MISSION 16-34: LAUNCH, LAND, IMPACT



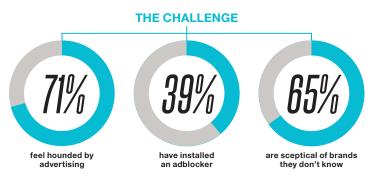
INTRODUCTION

Mission 16-34: Launch, Land, Impact is the fourth edition of DCM's industry-leading Building AV media play in the lives of Box Office Brands series. Created in partnership with

independent insight and strategy

agency Differentology, the study explores the different roles that young people and how cinema helps brands launch and land their messages with impact.

THE 16-34 AUDIENCE



THE MISSION

Kantar Millward Brown's AdReaction study found that cinema is the ad format that 16-34s are most positive towards so DCM's mission was to better understand this audience, their AV habits and the implications for brands.

WHAT WE FOUND

LAUNCH YOUR CAMPAIGN WITH CINEMA

Cinema delivers cultural moments.

The 16-week theatrical exclusivity window for cinema means that the big screen is still able to deliver big cultural moments that brands can take advantage of. Over half of 16-34s agree that they "don't like missing out on things other people are talking about" so they're quick to see the latest blockbusters to ensure they can be part of the wider conversation. This is perfect for brands looking to launch campaigns and reach an engaged, young audience.

Growing audience

Forecast Admissions¹

Big draw every week

Average weekly 16-34 admissions¹ Don't want to miss out

See a film in its opening 2 weeks²

Sources: 1. DCM Planner, industry admissions. 2. FAME 2017

Cinema occupies a unique position within AV.

The research shows that different AV channels are chosen either with 'active intent' or 'inactive intent' with some platforms delivering both at different times. Cinema occupies a unique position within

the AV mix as the only fully 'active' channel - it's a destination experience where 16-34s have actively planned to pay attention. This makes cinema the best environment for brands to land their campaigns - with an audience that is engaged and attentive.

One thousand 16-34s were asked to select descriptions they most associated with viewing AV content. These are the top three per channel...



Live TV

Fill time 30% Background viewing 26% Comforting 18%



YouTube

Fill time 43% 28% Helps me escape Binge viewing 27%

Cinema

Shared experience 37% High attention 34% Quality content



VOD

Binge viewing 27% Fill time 25% Quality content 19%



Social video:

Fill time 38% Low attention 27% Spontaneous 20%

Building Box Office Brands - Volume IV dem eo uk

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LAND - CONTINUED

Respondents were asked to rank from 1-5 the different AV platforms as 'premium' and 'trustworthy' with cinema ranking first most often across both measures. Brands advertising in cinema also benefit from a halo effect with cinema ads being ranked first at making 16-34s feel most positive towards a brand.

Premium experience

% channel ranked first

UVE TV: TV/
YOUTUBE: 15%

SOCIAL MEDIA: 11%

BVOD: 9%

Trustworthy ads

CINEMA: 35%

LIVE TV: 31%

YOUTUBE: 15%

SOCIAL MEDIA: 10%

BVOD: 9%

Brand positivity

LIVE TV: 25%

YOUTUBE: 20%

SOCIAL MEDIA: 7%

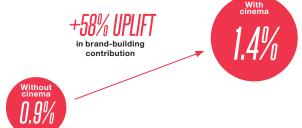
BVOD: 8%

IMPACT YOUR AUDIENCE

Cinema delivers positive impact.

Kantar Millward Brown's findings from *Building Box Office Brands Volume III* revealed that cinema delivers a greater contribution across all key brand-building metrics, but particularly brand love and brand difference. Including cinema in the media mix delivers a 58% uplift in the campaign's brand-building contribution.

Total contribution to brand building



Source: DCM/Kantar Millward Brown – Building Box Office Brands – Volume III. 208 campaigns without cinema; 61 campaigns with cinema.

Differentology's meta-analysis in Vol IV, focusing on 16-34s, has reinforced these results demonstrating that cinema's highly attentive and emotionally engaged audience delivers significant uplifts for brands including:

+30%

'Better Rational brand impression' perceptions

/**+60**%

Emotional brand perceptions

Base: 12 campaigns. 2,750 16-34s exposed to cinema; 1,402 16-34s not exposed to cinema.

TOP TEN 2019 16-34 FILMS

FILM	ADMISSIONS	TVRS*
Avengers 4	3.8m	25
The Lion King	2.7m	21
Toy Story 4	2.4m	19
lt 2	2.1m	16
Star Wars: Episode IX	2.0m	16
Aladdin	1.6m	12
Captain Marvel	1.6m	12
Frozen 2	1.6m	12
Spider-Man: Far From Home	1.4m	11
Dumbo	1.4m	11

Source: DCM Planner. Industry 16-34 admissions, between 01 Jan – 31 Dec 2019. *Equivalent TVRs.

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