



2022 CINEMA UPDATE

The latest on the UK cinema marketplace

2021 CINEMA ADVERTISING HEADLINES

After a strong bounce-back in 2021, cinema revenue will continue to grow significantly across 2022 closing in on 2019's peak.

The Drum.

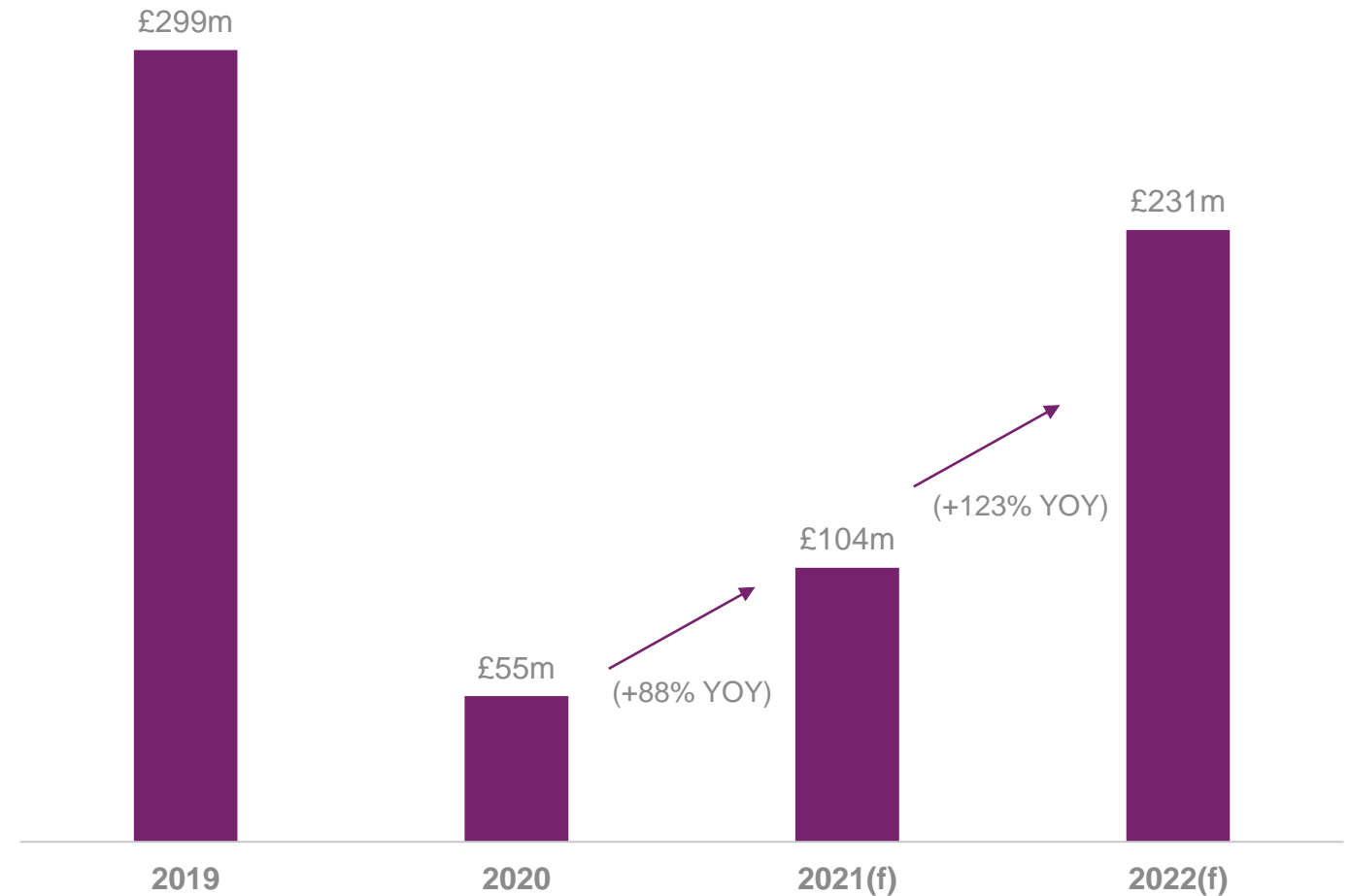
Cinema spend to near 2019 levels as 'almost every advertiser' returns

By Hannah Bowler - January 14, 2022

2021 Top advertisers included...



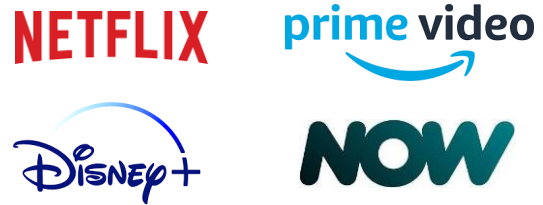
Cinema revenue
(Actual & Forecasts, WARC)



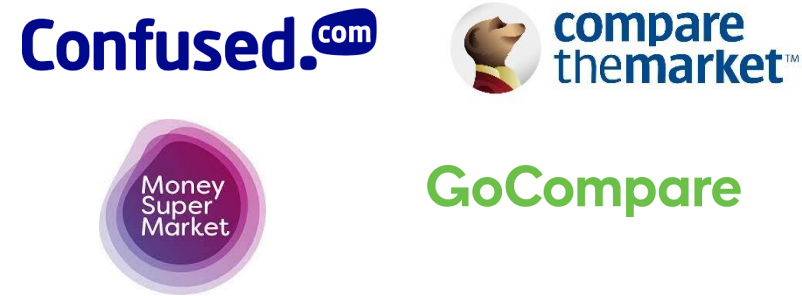
TV'S SURGE IN SPEND FROM **ONLINE BORN** BUSINESSES IS EXTENDING TO CINEMA

Having established themselves with AV campaigns on TV, many online-born businesses are now also extending AV schedules to include the big screen

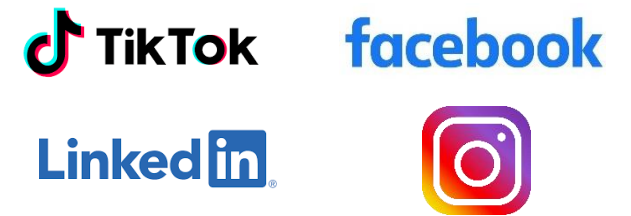
Streaming Platforms



Price Comparison Websites



Social Media



Food Delivery



Online Marketplaces



Exercise



Used Cars



Gambling



2021 CINEMA IN THE UK – THE NUMBERS



£556.9m

UK Box Office grew by
88% vs. 2020

497

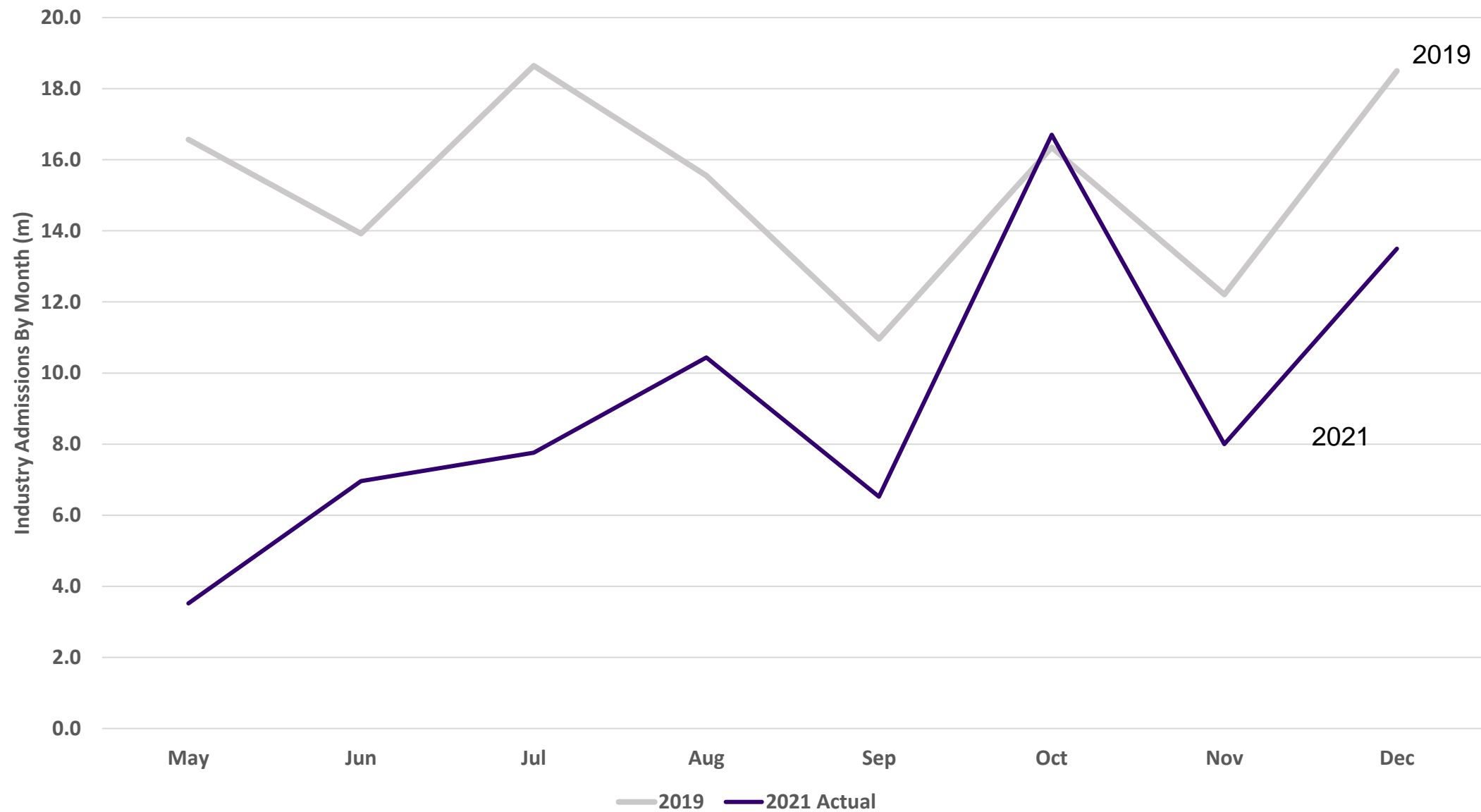
Number of titles
released was up 12%
YOY and only -20%
down on 2019's peak

74m

Industry admissions up
by 68% YOY

2021 - UK CINEMA ADMISSIONS BY MONTH VS PRE PANDEMIC

Gradual growth, with spikes around October and December, meant that we were back to c. 80% of pre-pandemic admissions levels by the end of 2021



UK Cinema Admissions:
2019 - 176m
2020 – 44m
2021 – 74m (+68% YoY)

UK TOP FILMS 2021

Incredible performances from *No Time To Die* and *Spider-Man: No Way Home* lead the 2021 UK box office



No Time To Die
£96.5m



Spider-Man: No Way Home
£74.8m



Dune
£21.8m



Shang Chi And The Legend of the Ten Rings
£21m



Peter Rabbit 2
£20.4m



Black Widow
£18.8m



Venom: Let There Be Carnage
£18.0m



Free Guy
£16.8m



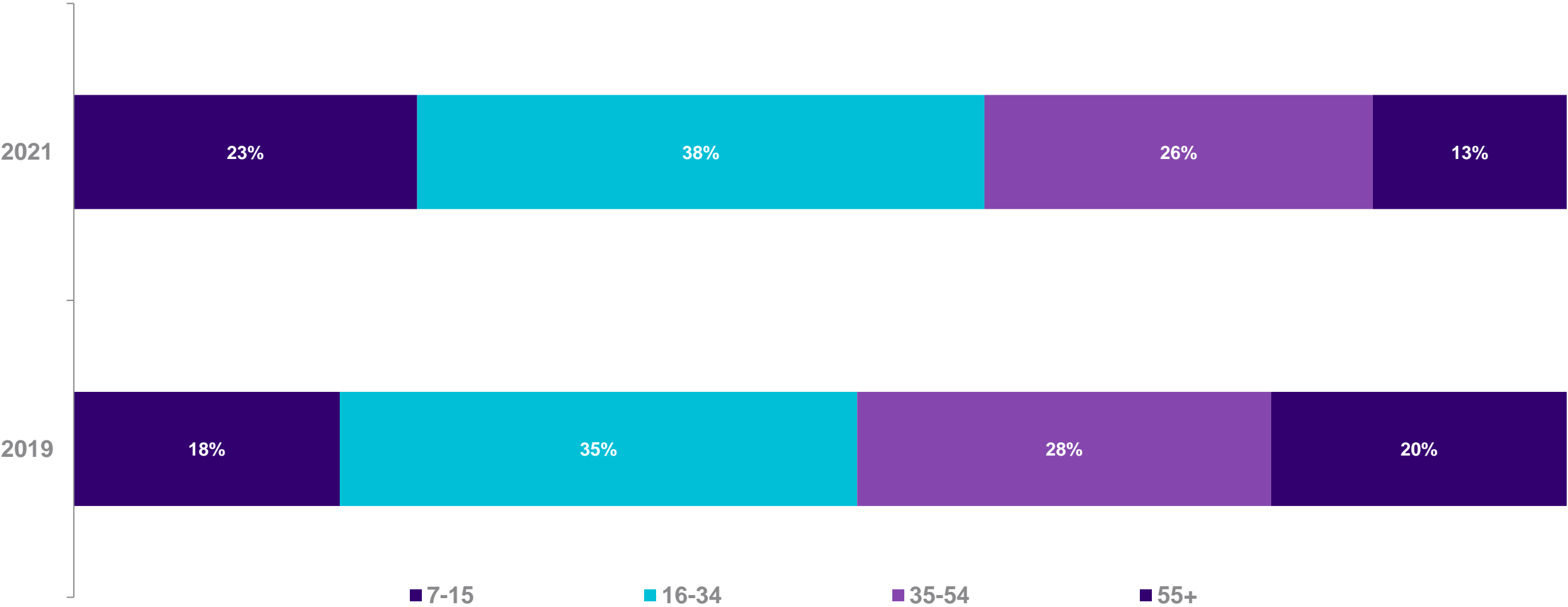
Fast & Furious 9
£16.4m



Eternals
£14.8m

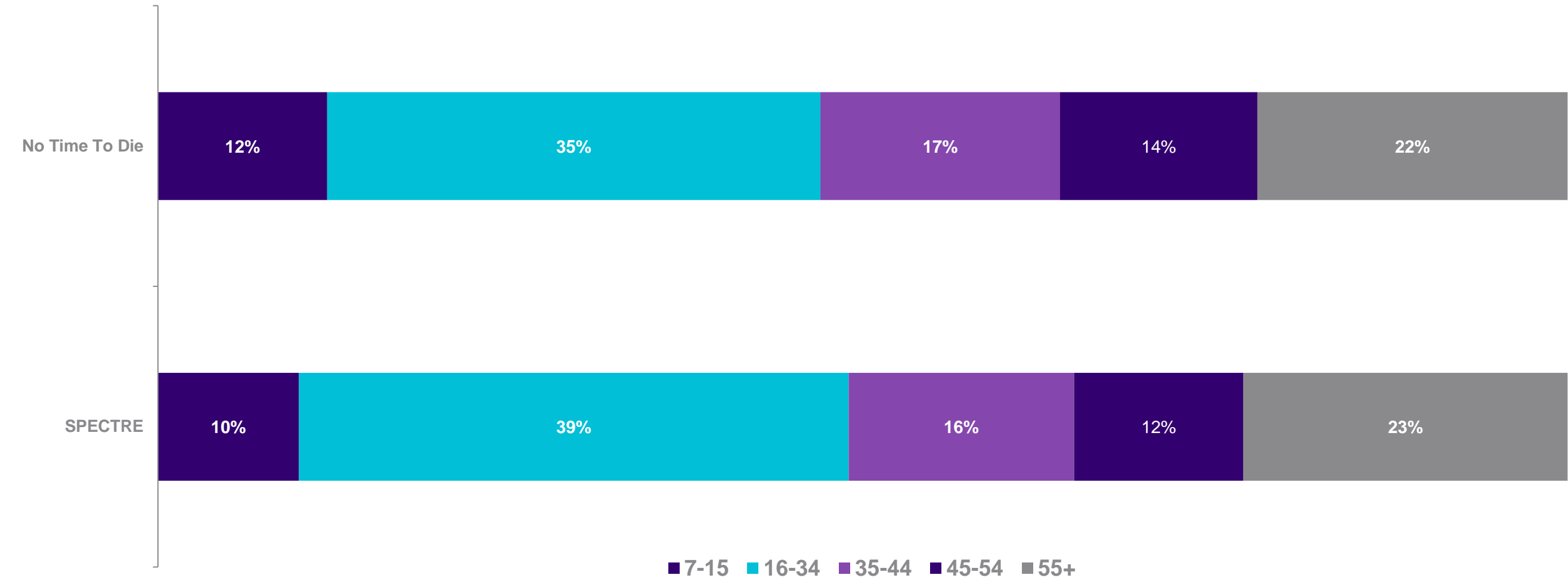
CINEMA'S POST-PANDEMIC AUDIENCE IS PROFILING YOUNGER

Based on the opening seven months, 38% of cinema's returning audience are 16-34, up 8% vs the pre-pandemic profile.



THE OLDER AUDIENCE ARE RETURNING FOR THE RIGHT FILM

No Time To Die's audience is very similar to *SPECTRE's*



RETURNING CINEMAGOERS HAVE LOVED BEING BACK

What did you enjoy about the experience of being back at the cinema?

“The **atmosphere of a cinema is unbeatable**. The comfy chairs and massive screens and big speakers. No annoying family members asking questions and trying to speak during the film. Also I’ve missed Tango ice blasts and slushies!”

“Being **immersed in the film** and **not having the distractions of life**. That feeling when you go back into the sunlight and it’s like you’ve been in a different world”

“**Dark room, great sound, adverts, trailers and properly focussing** on a film. Great atmosphere and experience”

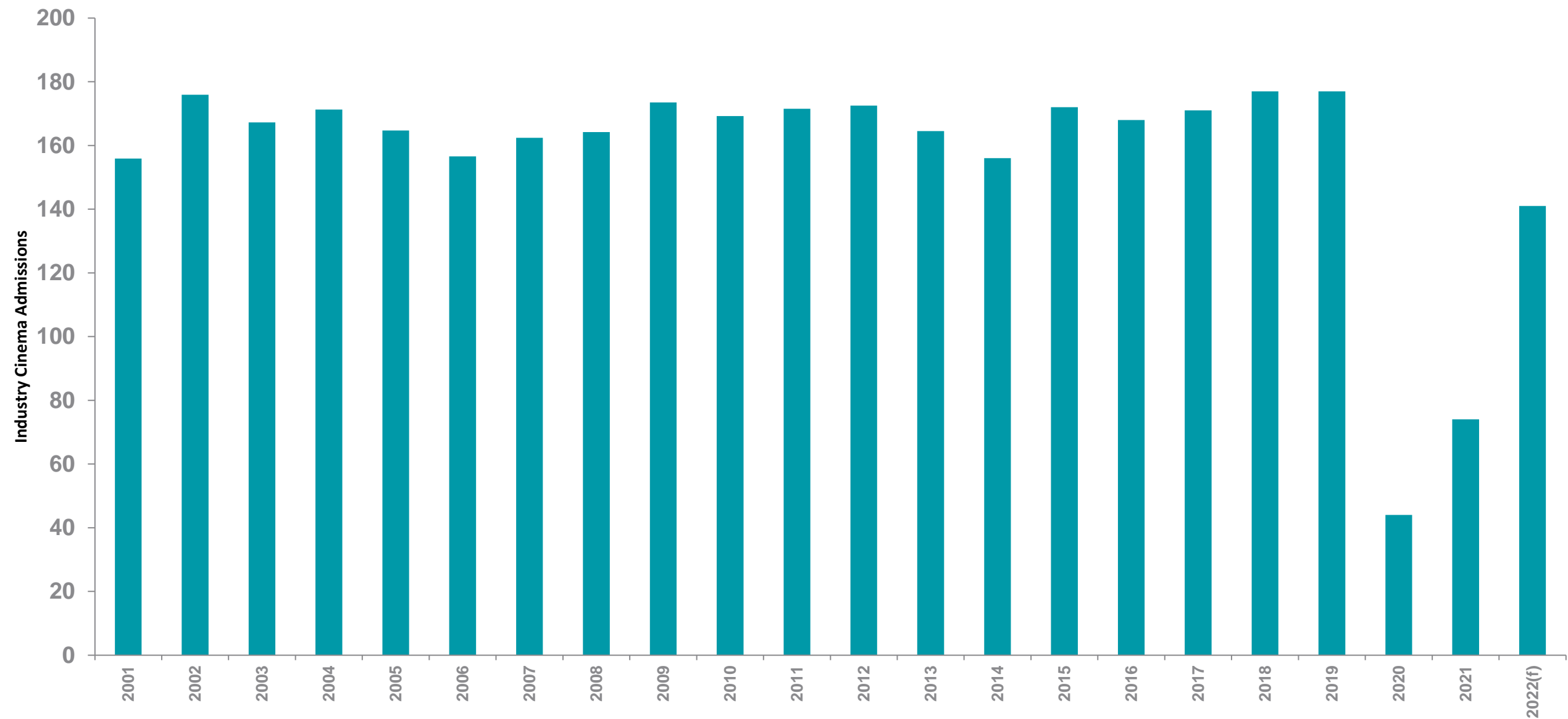
“Feeling the movie through your body. The **surround sound is something I missed** so much, it **adds another dimension**”

“The **whole cinema experience**, getting ready to go, deciding what to watch, eating takeout before film starts, ordering treats and snacks and drinks in the cinema with the film, big screen and sound, and after meal after cinema experience”

“It was amazing, **I had forgotten what being in a cinema was like, I loved it so much and I can’t wait to go back later this month!!**”

UK CINEMA AUDIENCE WILL CONTINUE TO RETURN IN 2022

With the impressive slate for this year lined up, we are forecasting 2022 to reach 80% of the record breaking 2019 admission level.

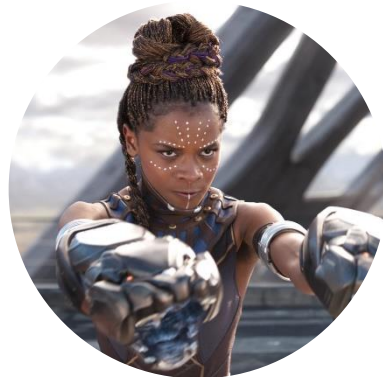


PREDICTED TOP FILMS – 2022 UK BOX OFFICE

Returns to Pandora, Wakanda and Gotham City are forecast to deliver 2022's biggest hits at the UK box office



Avatar 2
£70m



Black Panther: Wakanda Forever
£45m



The Batman
£45m



Thor: Love and Thunder
£40m



Jurassic World: Dominion
£35m



Top Gun: Maverick
£30m



Doctor Strange In The Multiverse of Madness
£30m



Mission: Impossible 7
£25m

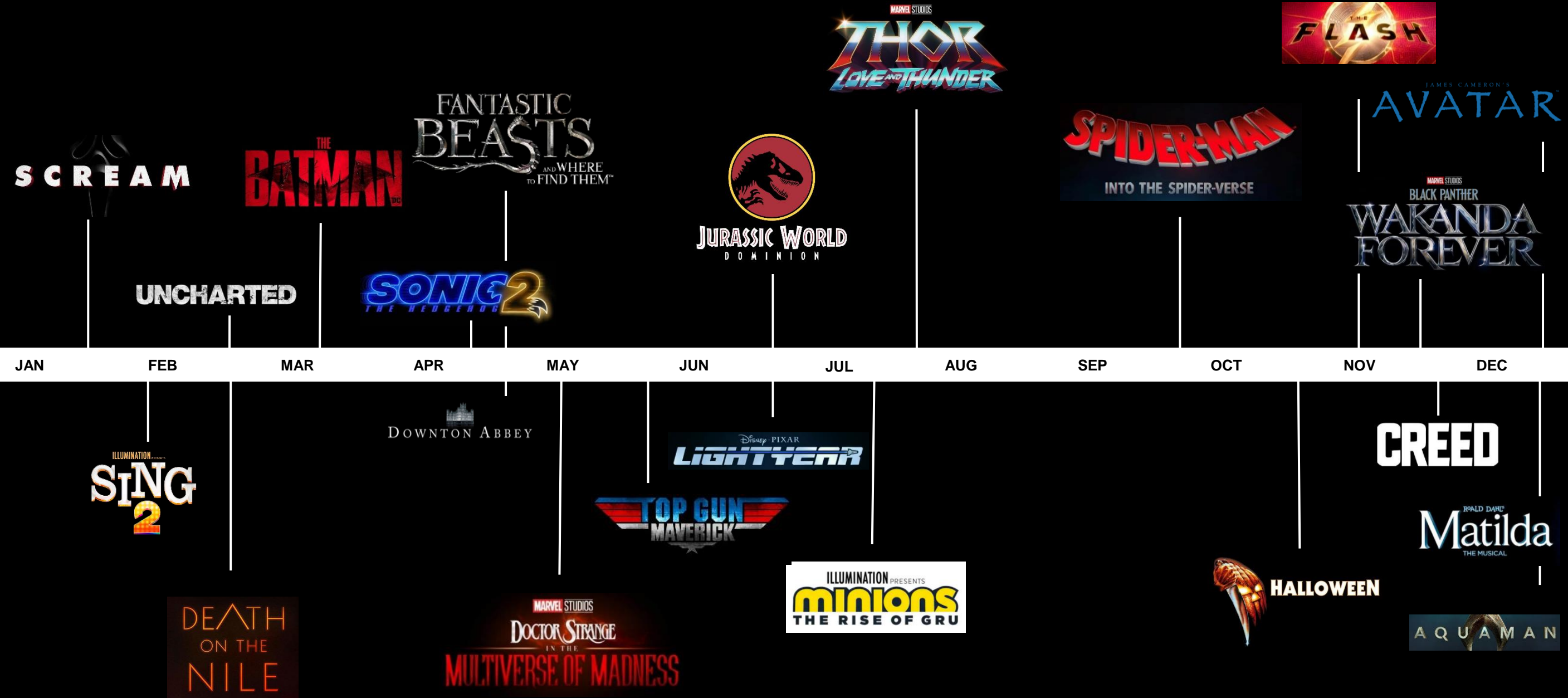


Fantastic Beasts: The Secrets of Dumbledore
£25m



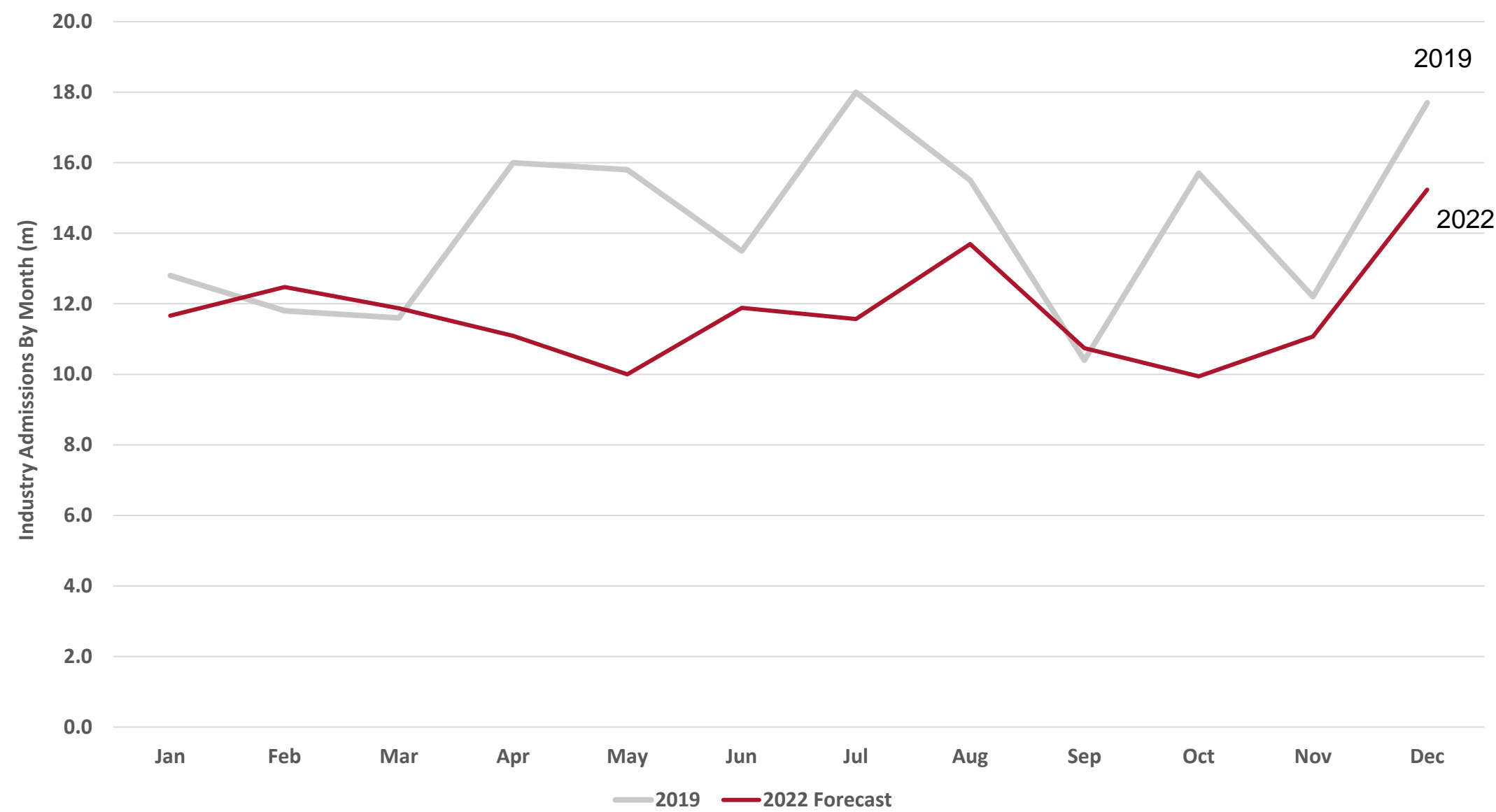
Downton Abbey: A New Era
£21m

2022 FILM SLATE



2022 - UK CINEMA ADMISSIONS FORECAST VS 2019

Across the year admissions are anticipated to round out at c.80% of 2019's total.



UK Cinema Admissions:
2019: 176m
2020: 44m
2021: 74m
2022(f): 145m

2022 NON-BARTER TITLES

We will not accept barter on these designed non-barter films across the year



Jurassic World: Dominion

10 June



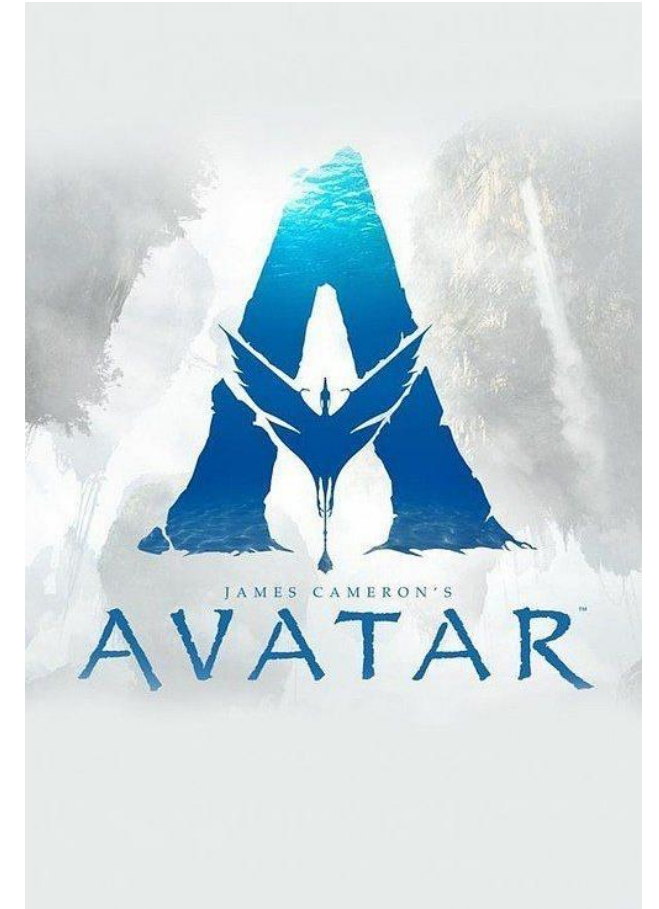
Thor: Love and Thunder

8 July



Black Panther: Wakanda Forever

11 November



Avatar 2

16 December

2022 TOP 10 16-34 BLOCKBUSTER FORECASTS

2022 will be a huge year at cinema with the return of some of the biggest franchises of all time

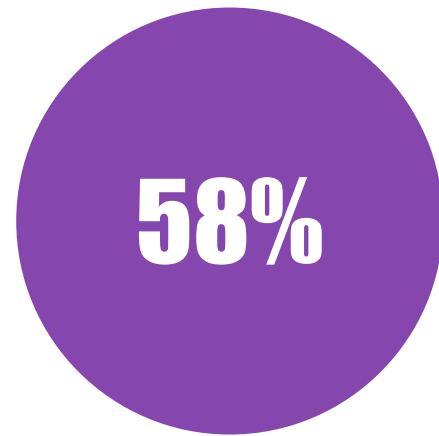
	Industry Admissions	16-34 TVRs
Black Panther: Wakanda Forever November	5.7m	23
The Batman March	5.6m	21
Thor: Love & Thunder July	5.1m	20
Doctor Strange In The Multiverse Of Madness May	3.9m	15
Jurassic World: Dominion June	5.1m	15
Top Gun: Maverick May	4.4m	14
Avatar 2 December	4.9m	13
Fantastic Beasts: Secrets of Dumbledore April	3.2m	11
The Flash November	2.6m	9
Morbius April	1.9m	8



CINEMA HELPS DELIVER MORE OF THE KEY 16-34 AUDIENCE FOR YOUR PLANS

Investment across March can deliver incremental reach to TV+BVOD campaigns among the pivotal 16-34 audience

Adding the 16-34 AGP to your March plan adds reach...



TV + VOD ONLY

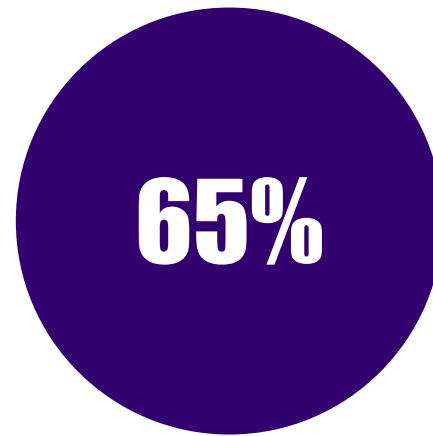
4 weeks

16-34 Adults

250 commercial TVRs

3m VOD impressions

No cinema



TV + VOD + CINEMA (£360K*)

4 weeks

16-34 Adults

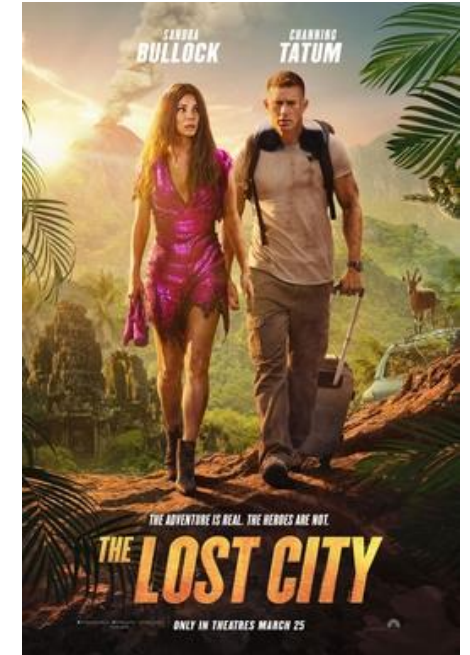
250 TVRs

3m VOD impressions

2.3m cinema admissions (19.7 TVRs)

+7% exclusive reach

Key 16-34 titles...



Source: IPA Touchpoints Channel Planner & DCM Aston Campaign Planner.
16-34 adults AGP – March 2022. *No agency discount applied to cinema budget.



THE LATEST ON CINEMAGOERS

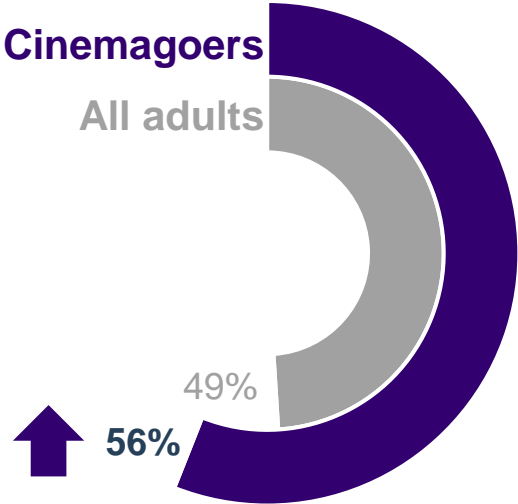
Insight from research conducted by Old Salt and Little Wing

CINEMAGOERS FEEL MORE LIBERATED, EMPOWERED AND AMBITIOUS

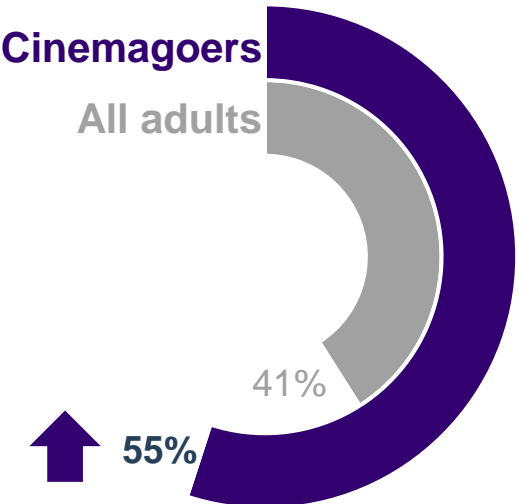
Cinemagoers – who are typically younger – are coming out of the last few years feeling inspired to pursue their ambitions and with a greater sense of self-belief

% agree...

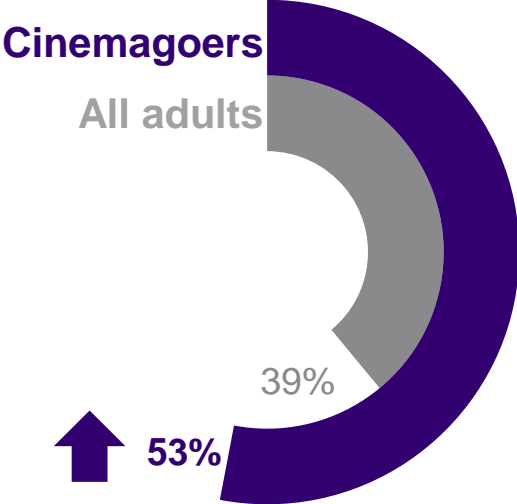
‘I worry about other people’s opinions less now than I did before the Coronavirus pandemic’



‘I feel more inspired to pursue my ambitions now than I did before the Coronavirus pandemic’








‘I have more self-belief now than I did before the Coronavirus pandemic’



OUR TOP AMBITIONS RELATE TO IMPROVING QUALITY OF LIFE & HOW WE SPEND OUR TIME

Travelling ranks higher than 'time with loved ones' for cinemagoers whose top ambitions are less likely to have changed since the pandemic

All adults top 5 personal ambitions

- #1**  More time doing things that make me happy
- #2**  More time with loved ones
- #3**  Improving my physical health
- #4**  Saving money
- #5**  Improving my mental health

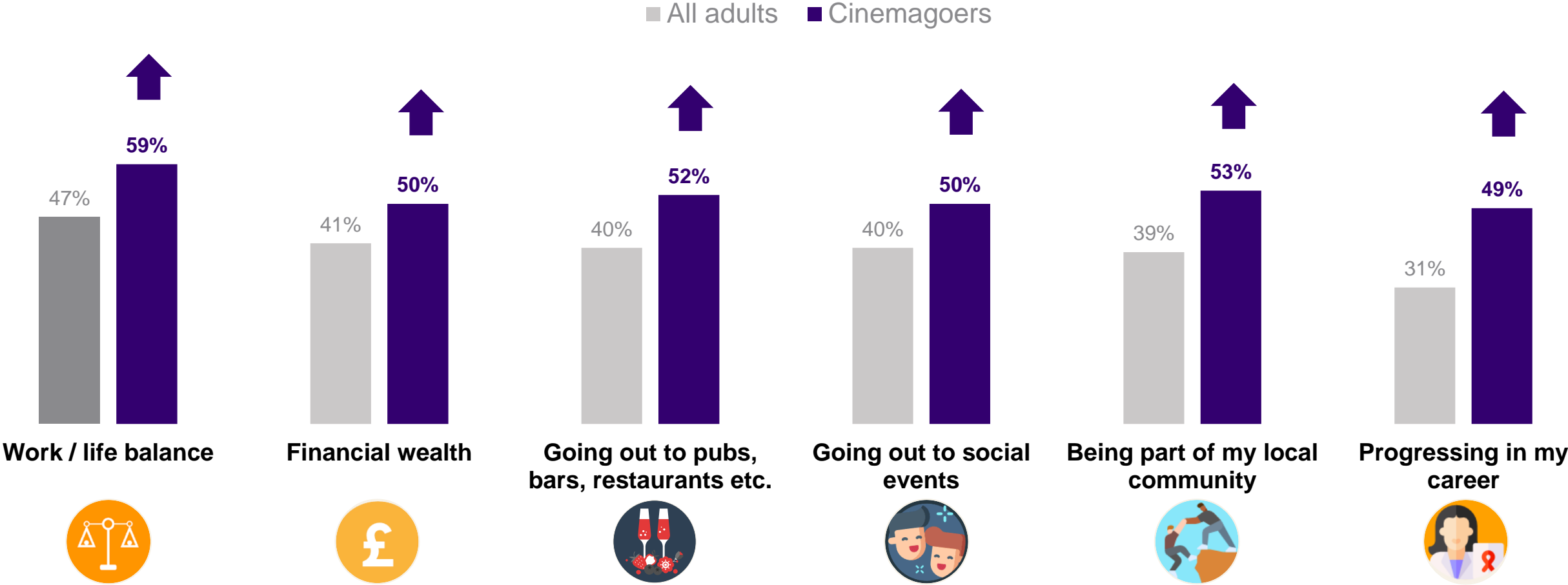
Cinemagoers top 5 personal ambitions

- #1**  More time doing things that make me happy
- #2**  Saving money
- #3**  Improving my mental health
- #4**  Travelling
- #5**  Improving my physical health

CINEMAGOERS ARE MORE LIKELY TO FEEL EXTRINSIC & SOCIAL GOALS ARE MORE IMPORTANT

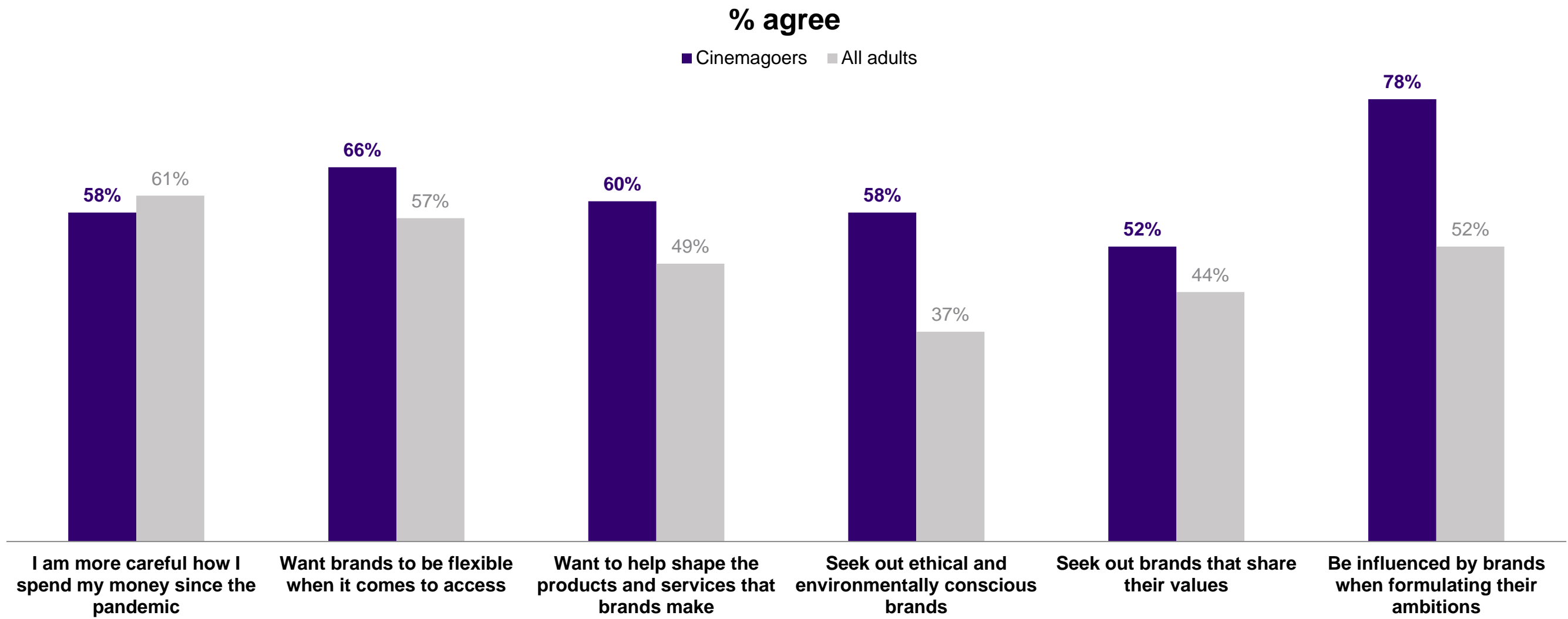
Cinemagoers are significantly more likely to agree that balance, financial and career progression and socialising are all even more important to them now.

% who say each is more important now vs before the pandemic



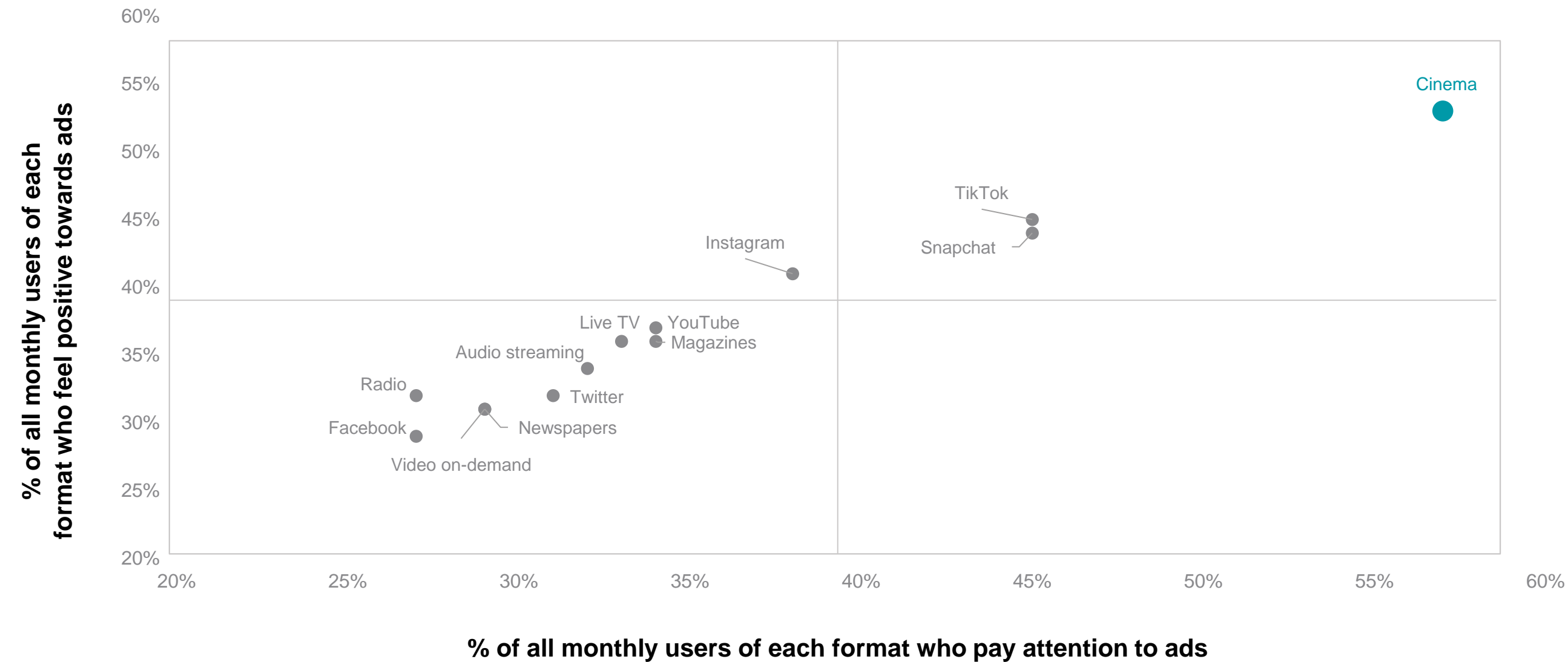
3 IN 5 ARE MORE DISCERNING WITH MONEY NOW BUT BRANDS REMAIN IMPORTANT

Cinemagoers are more in tune with brands, keen to engage with shaping their offering, place more importance on ethical and environmental concerns and they're aware that they're influenced by brands too.



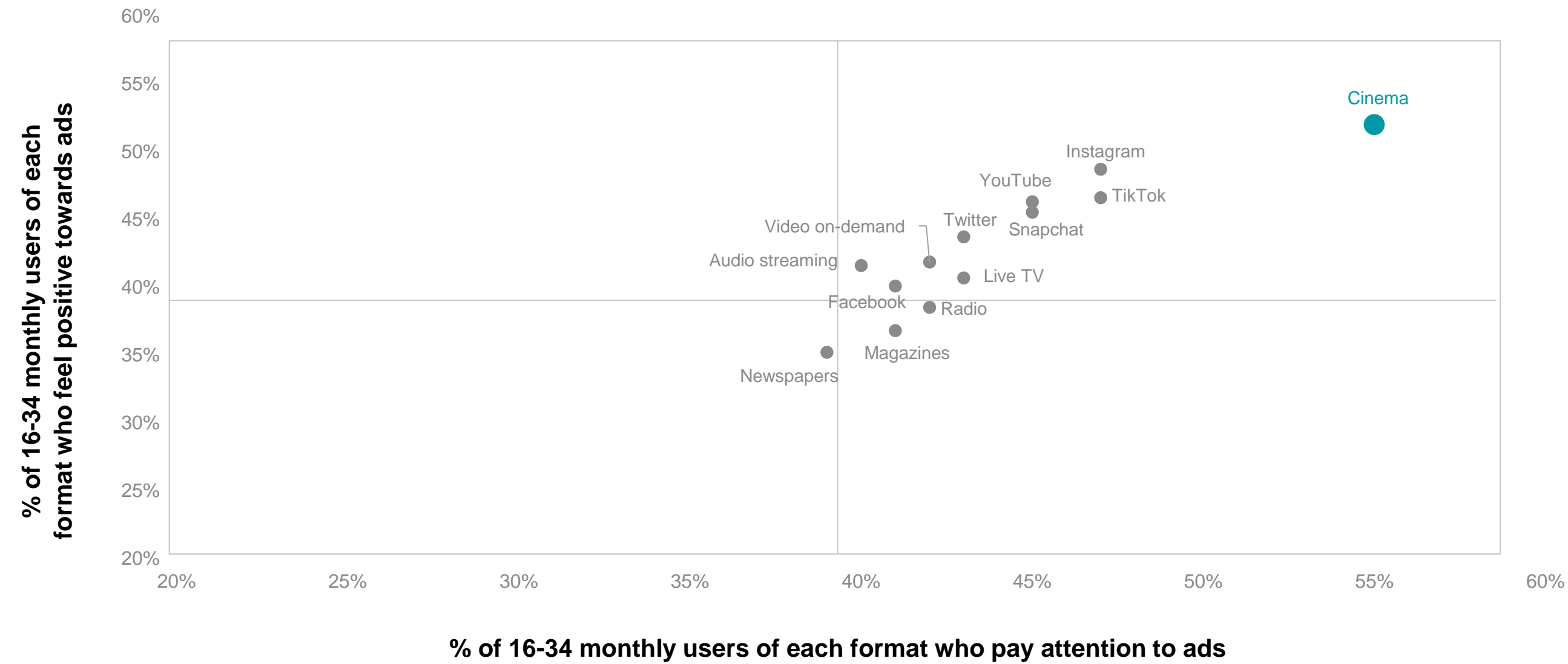
CINEMA ADS REIGN SUPREME FOR ATTENTION AND POSITIVITY

Cinema has a clear advantage for brands offering a format where its regular users are far more likely to feel positive towards the ads they see and the amount of attention they pay to them.



CINEMA ALSO COMES OUT ON TOP FOR THE 16-34 AUDIENCE

16-34 monthly users of each channel are more likely to be positive/attentive to the ads – with cinema yet again coming out a clear first.



**WATCH THIS SPACE FOR
MORE ON ATTENTION IN
CINEMA LATER IN 2022...**

THE BEST SEAT IN MEDIA



digital cinema media