digital cinema media

#INTROTOCINEMA

WHY CINEMA?

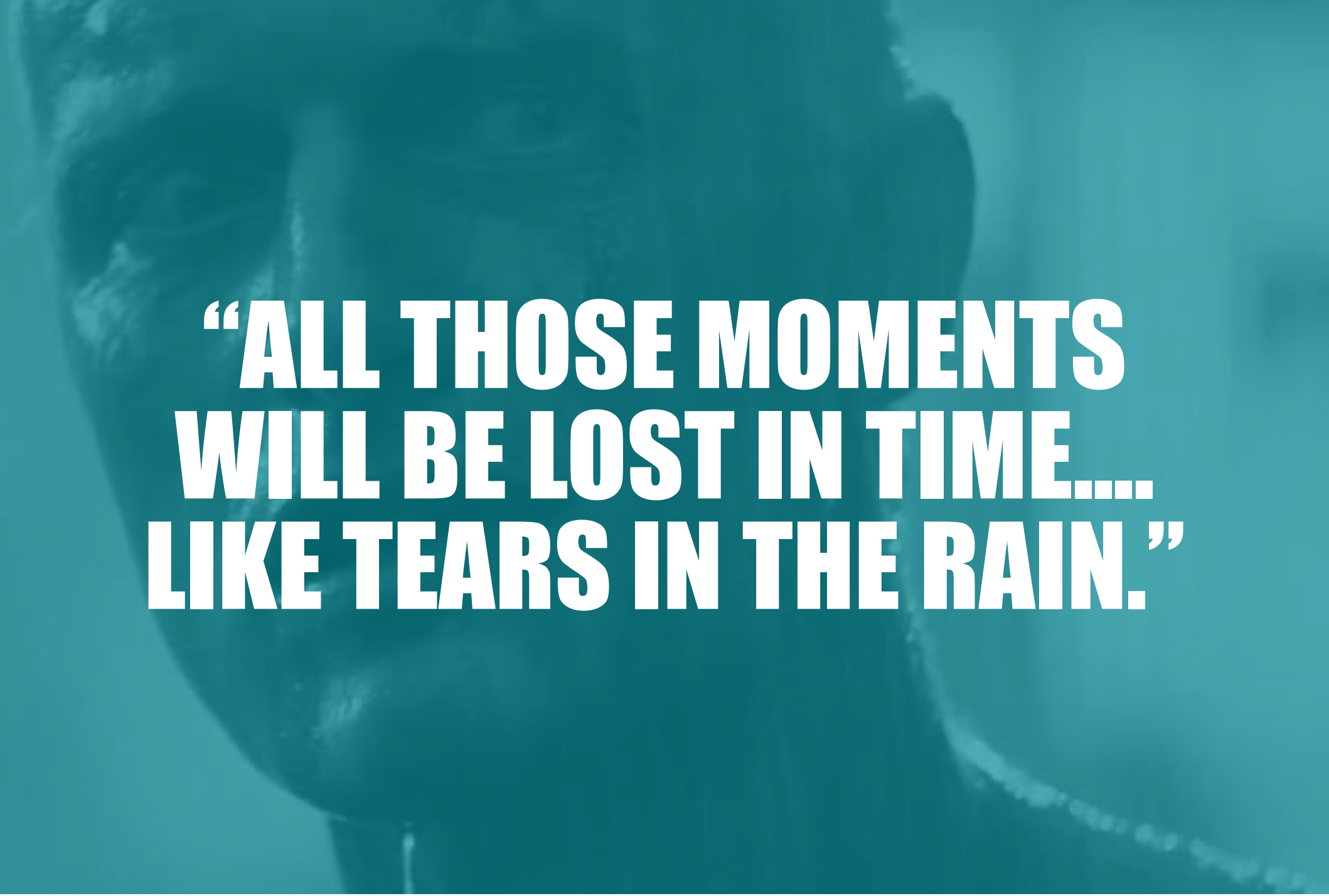
TALINE ERHARDT

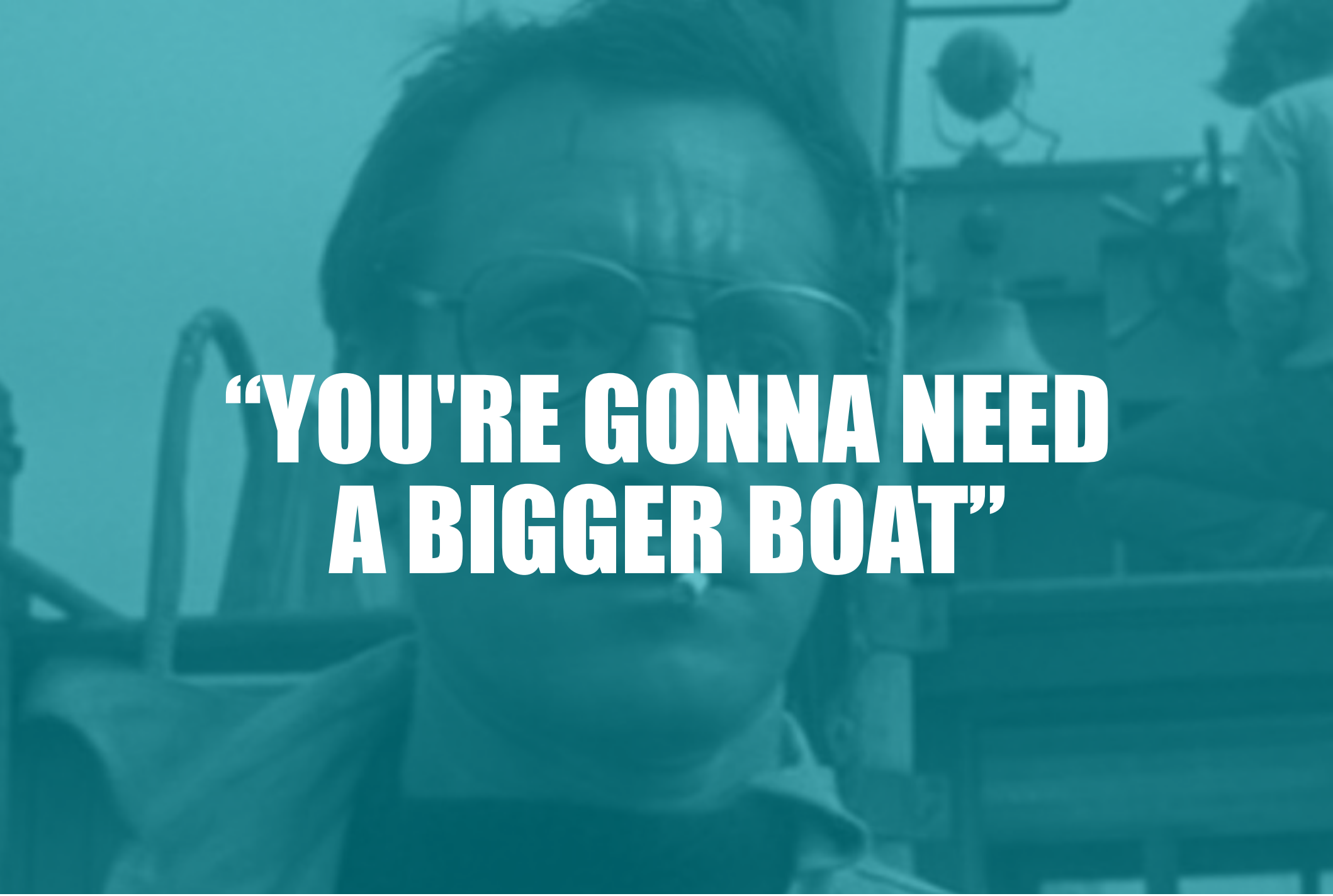
Senior Agency Manager, Digital Cinema Media

“FRANKLY MY DEAR,
I DON'T GIVE A DAMN.”

“TO INFINITY AND BEYOND”

“I’LL BE BACK”

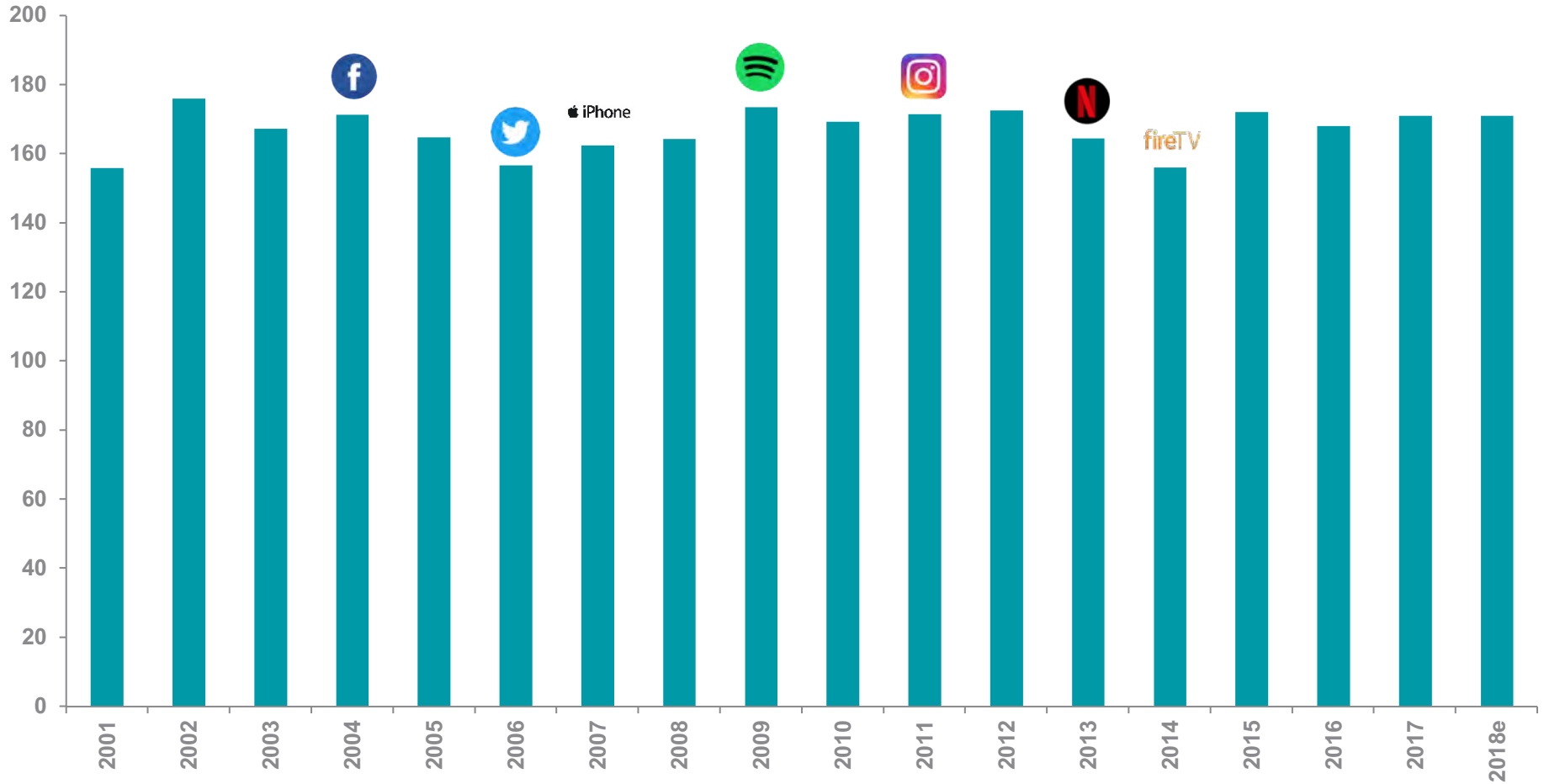

“ALL THOSE MOMENTS
WILL BE LOST IN TIME....
LIKE TEARS IN THE RAIN.”


“YOU'RE GONNA NEED
A BIGGER BOAT”

“SAY HELLO TO MY
LITTLE FRIEND”

CINEMA HAS NEVER BEEN MORE RELEVANT

STANDING THE TEST OF TIME



THE CULTURE OF CINEMA

THE GREATEST SHOWMAN

Captured the public's imagination

LOVE, SIMON

Breaking down boundaries

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BLACK PANTHER

Breaking records

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"GREAT ADVERTISING AND COMMUNICATION BECOMES A PART OF CULTURE. SURELY A BRAND WANTS TO BE PART OF CULTURE?"
Sir John Hegarty

THE YEAR OF THE BRAND

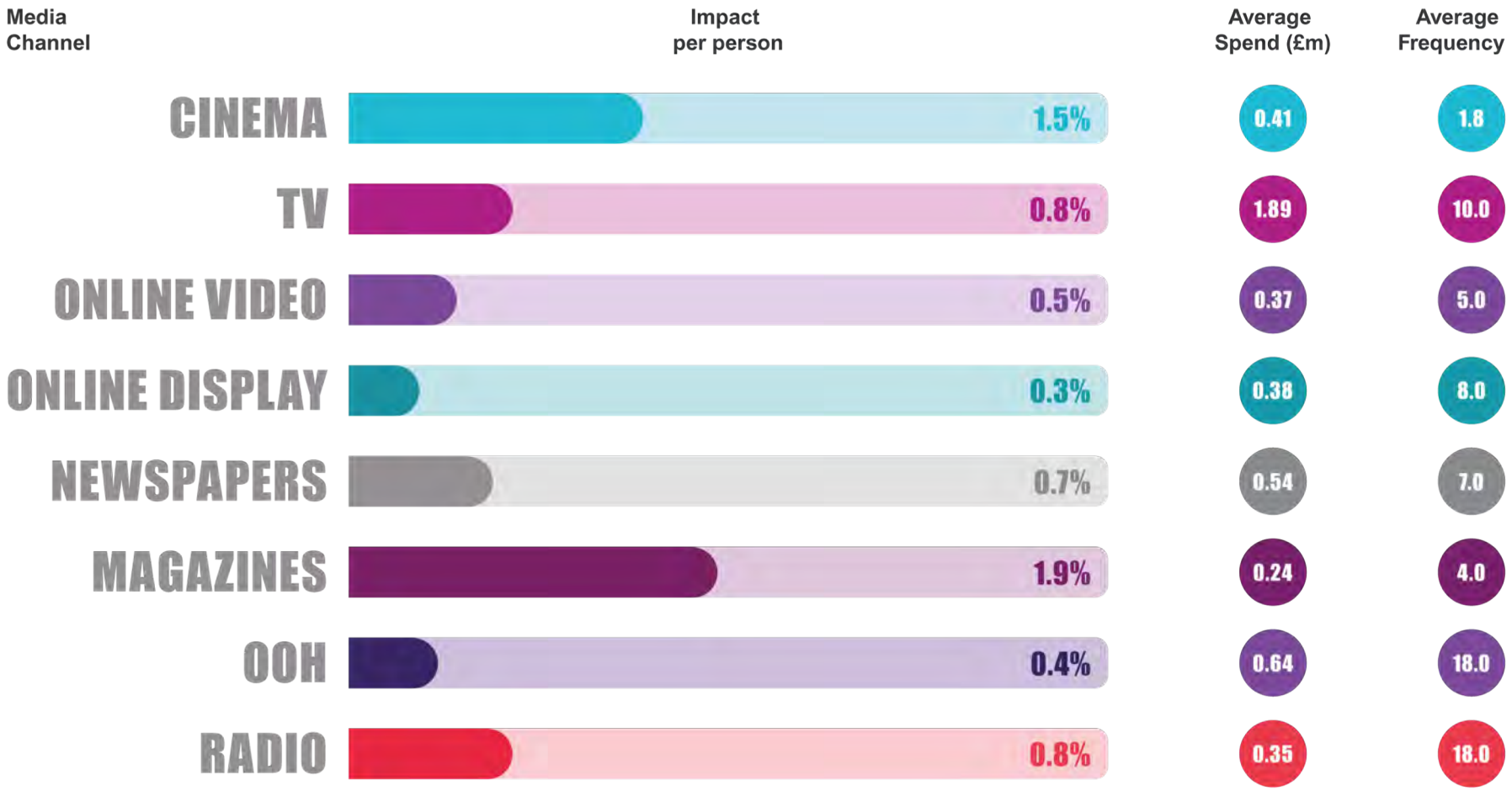
“WE’VE FORGOTTEN TO DO THE ONE THING ADVERTISING’S REALLY GOOD AT: MOVE PEOPLE”

Nils Leonard

EMOTIONAL CREATIVE WORK = LONG-TERM EFFECTS

BRAND LOVE

Cinema delivers 3x the impact of online video on brand love and delivers almost twice the contribution of TV per person reached.



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KANTAR MILLWARDBROWN

Source: Millward Brown CrossMedia Database, European data
Cinema: 71 | TV: 268| Online Video: 115 | Online Display: 232 | Newspapers: 76 | Magazines: 53 | OOH: 163 | Radio: 78

THE CONTEXT OF CINEMA

UNRIVALLED IMPACT

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THE MOTHER OF ALL SCREENS

THE SIZE OF…

336

of the largest TV screens

4,176

of the largest tablet screen

41,402

of the largest smart phone screen

UNDIVIDED ATTENTION

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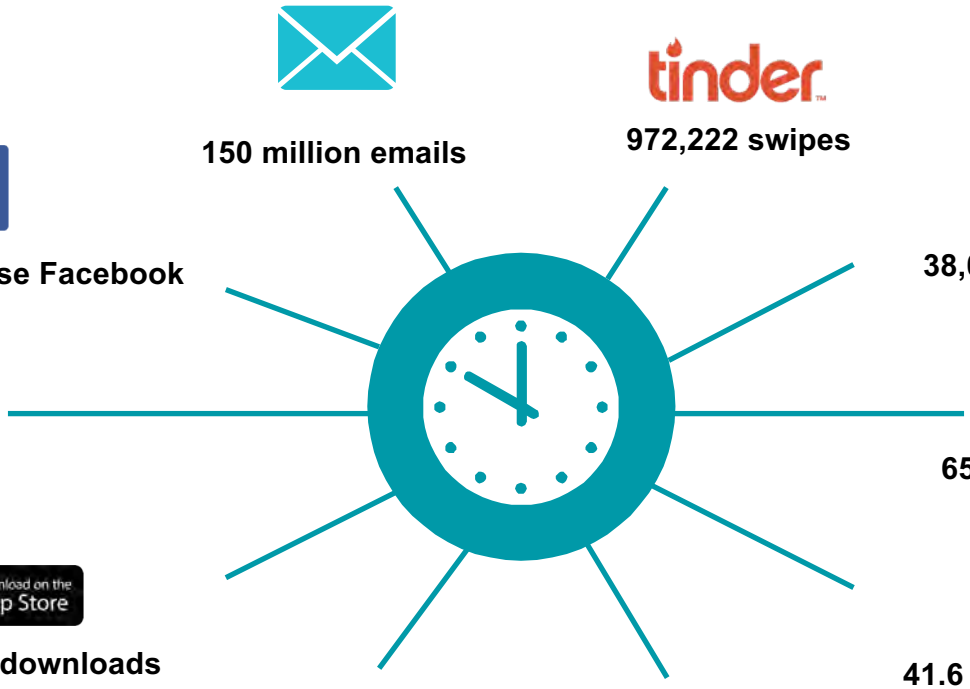
FIGHT FOR ATTENTION

HERE'S WHAT HAPPENS IN AN INTERNET MINUTE



150 million emails

972,222 swipes

763,888 people use Facebook

38,052 hours of listening

69,444 hours watched

65,900 videos and photos posted

51,000 app downloads

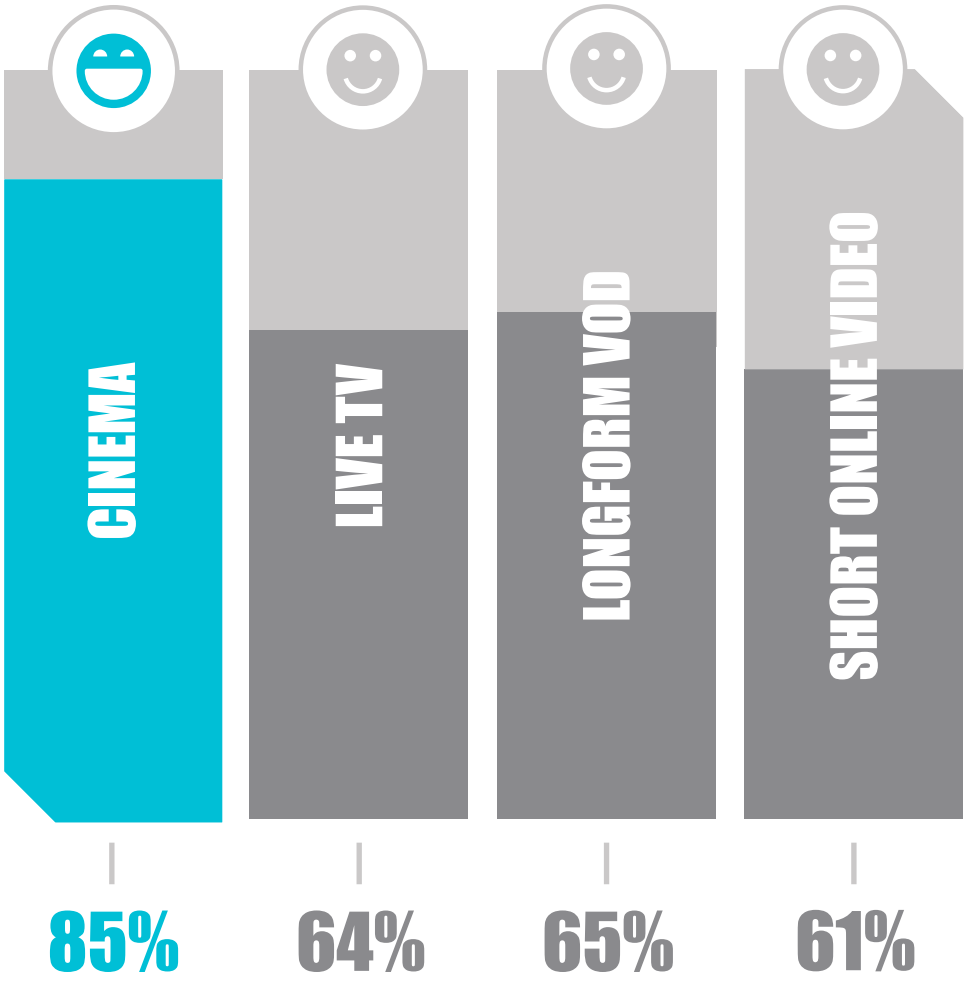
41.6 million messages

£587,723 spent online

1,389 rides

CINEMA CREATES POSITIVE EMOTIONS

More than any other AV channel



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Source: IPA TouchPoints 2016.
% of all time spent consuming each media associated with positive emotions

CINEMA PROFILES YOUNGER AND MORE UPMARKET

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Source: GB TGI Q1 2017
Base: All respondents. Target 'In the last week cinema' / 'Channels watched in the last week

YOUNG AUDIENCES

GROWTH IN YOUTH CINEMAGOING: 91% VS. 76%

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Source: GB TGI Q1 2017 vs. 2007
16-34 cinemagoers

FAST FACTS

16-34 Adults

KEY INFORMATION

Audience

91% are cinemagoers

50/50 Male/Female

Admissions & frequency

75.8m admissions per year

44% of all UK admissions

7.5 Visits per year vs. avg of 6

Regional skew

34% London SE

Upmarket

54% ABC1

CINEMA BEHAVIOUR

Attend

3 Average group size

38% Friends

33% As a couple

Foyer

Average dwell time **21 minutes**

Key footfall periods

Opening weekend + first week

Wednesday, Friday, Saturday

Technology

55% Browse internet on phone in foyer

47% Share their cinema trip on social media

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Source: Admissions / frequency data: CAA Film Monitor (Jan-Dec 2016).
Coverage & frequency system. Base 7+. Target 16-34 Year Olds
Demographics: IPA TouchPoints 2016

THE BEST SEAT
IN MEDIA
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COMING SOON

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THE CINEMA MARKETPLACE.

MADDY TYSOE
Agency Assistant, Digital Cinema Media

UK CINEMA - THE NUMBERS

803 SITES
CA. 4,323 SCREENS
CA. +800,000 SEATS

Source: IHS Screen Digest

UK CINEMA – CONTINUED GROWTH

Cinema Box Office

2000 – £639m

2006 – £762m

2015 – £1.2bn

2016 – £1.3bn

2017 – £1.4 bn

2018 est. – £1.4bn

Source: Comscore UK & Ireland data.

HUGE ADMISSIONS GROWTH OVER THE LAST 30 YEARS

1987: 74.8M

2017: 171M

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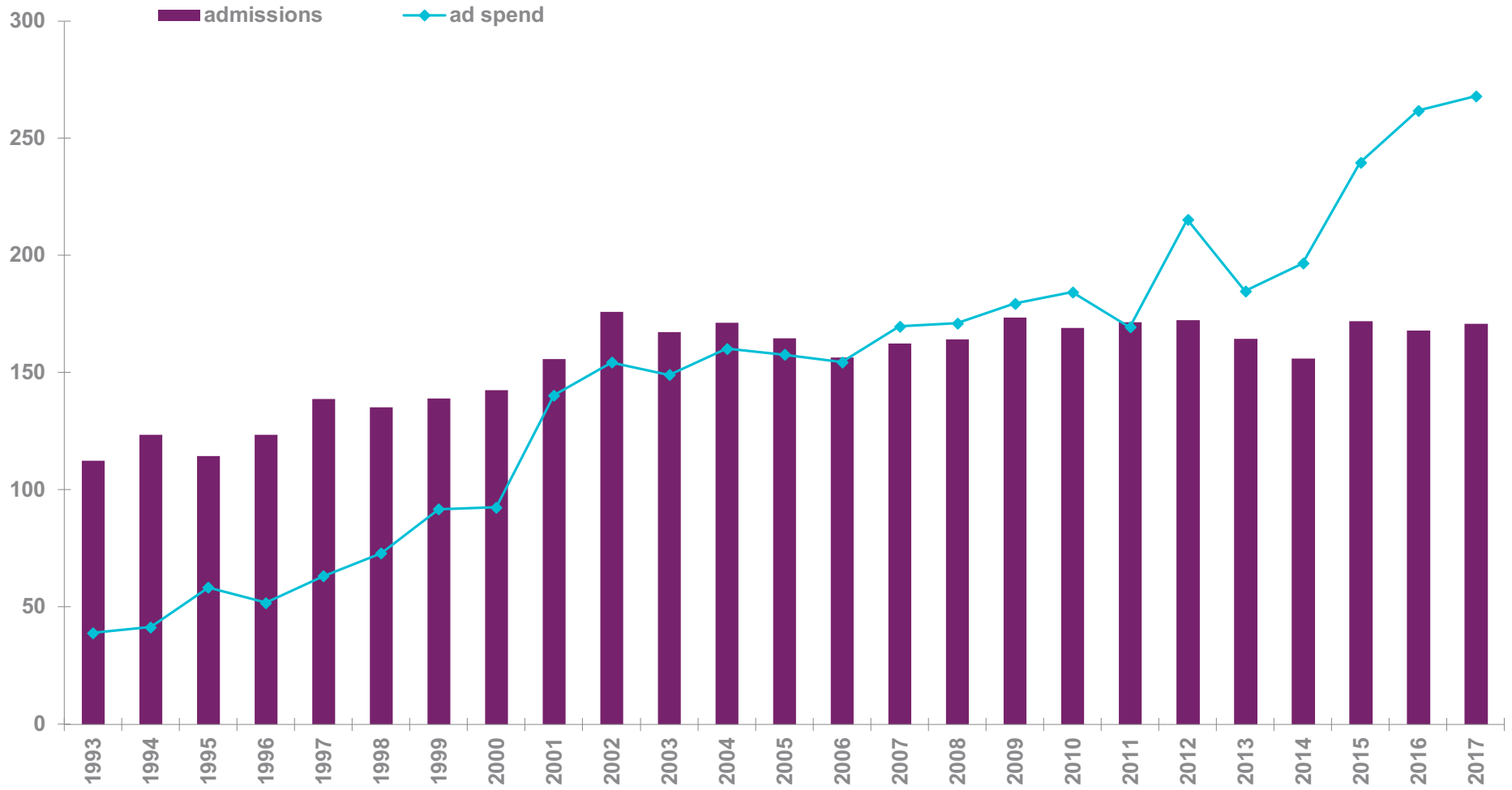
Source: Rentrak Jan – Dec 1987 cinema admissions.
Cinema Advertising Association Annual admissions Jan – Dec 2017.

CINEMA ADMISSIONS & AD REVENUE GROWTH



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Source: Admissions: CAA
Ad spend: WARC

ADMISSIONS – WEEKLY / YEARLY DELIVERY

171m

Estimated 2018
cinema admissions

3.3m

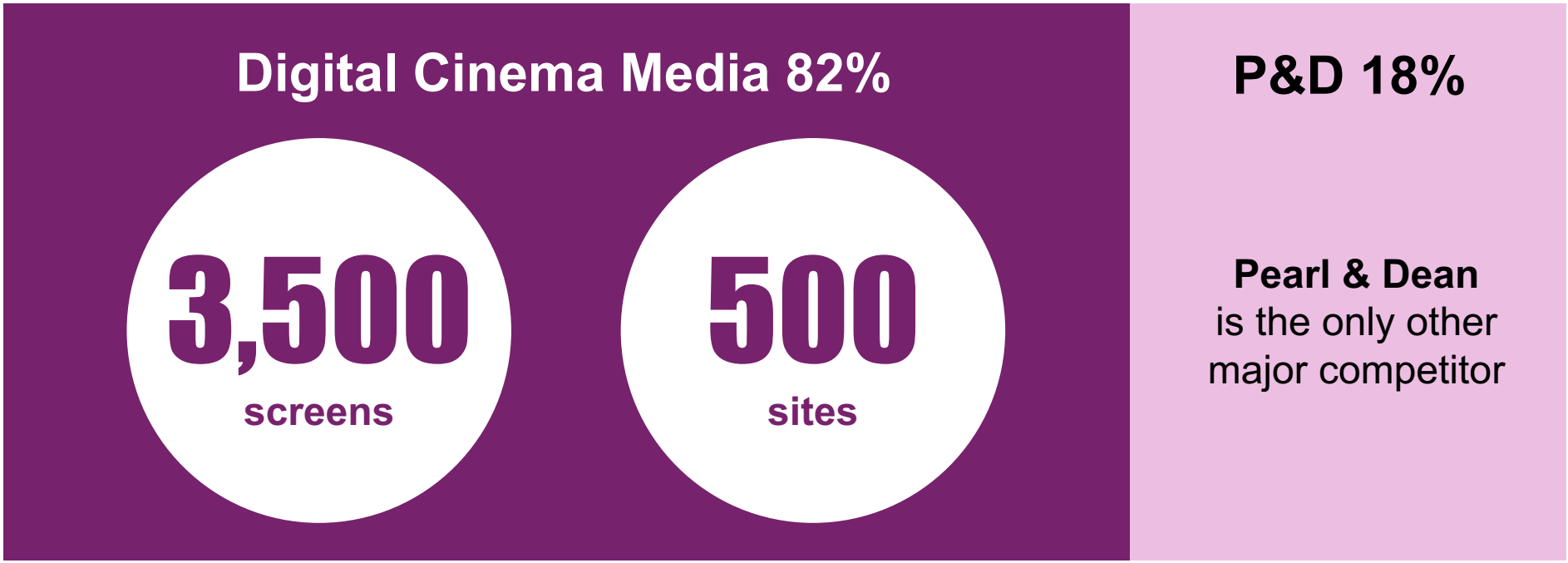
Average industry
weekly admissions

2.7m

Average DCM
weekly admissions

Source: DCM campaign Management.
Based on 171m estimated yearly admissions.
Jan – Dec 2018.

DCM REPRESENTS 82% OF THE UK MARKETPLACE



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Source: Sites and screens data = CAA.
DCM/P&D share of industry admissions = Comscore, 2017.

DCM'S PARTNERS

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ODEON FANATICAL ABOUT FILM

cineworld CINEMAS

VUE

Picture House

CURZON

EVERYMAN

PLUS 160+ INDEPENDENT CINEMAS

ODEON, CINEWORLD AND VUE

PICTUREHOUSE, CURZON AND EVERYMAN

BOUTIQUE ESTATE

BUILDING BOX OFFICE BRANDS

ROB ATTWOOD

Insight Assistant, Digital Cinema Media

BUILDING BOX OFFICE BRANDS

VOLUME 1

Media Mix

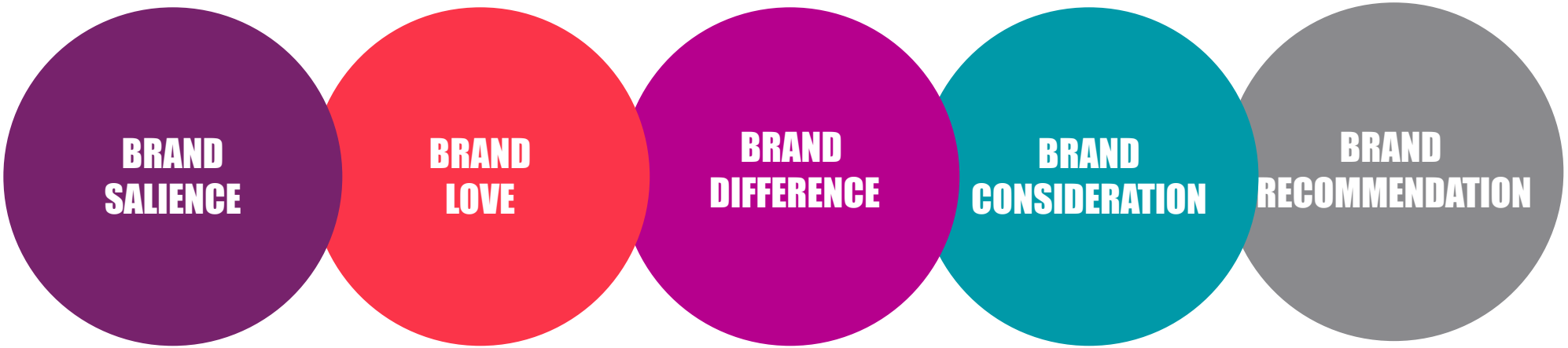
VOLUME 2

ROI

VOLUME 3

AV Platforms

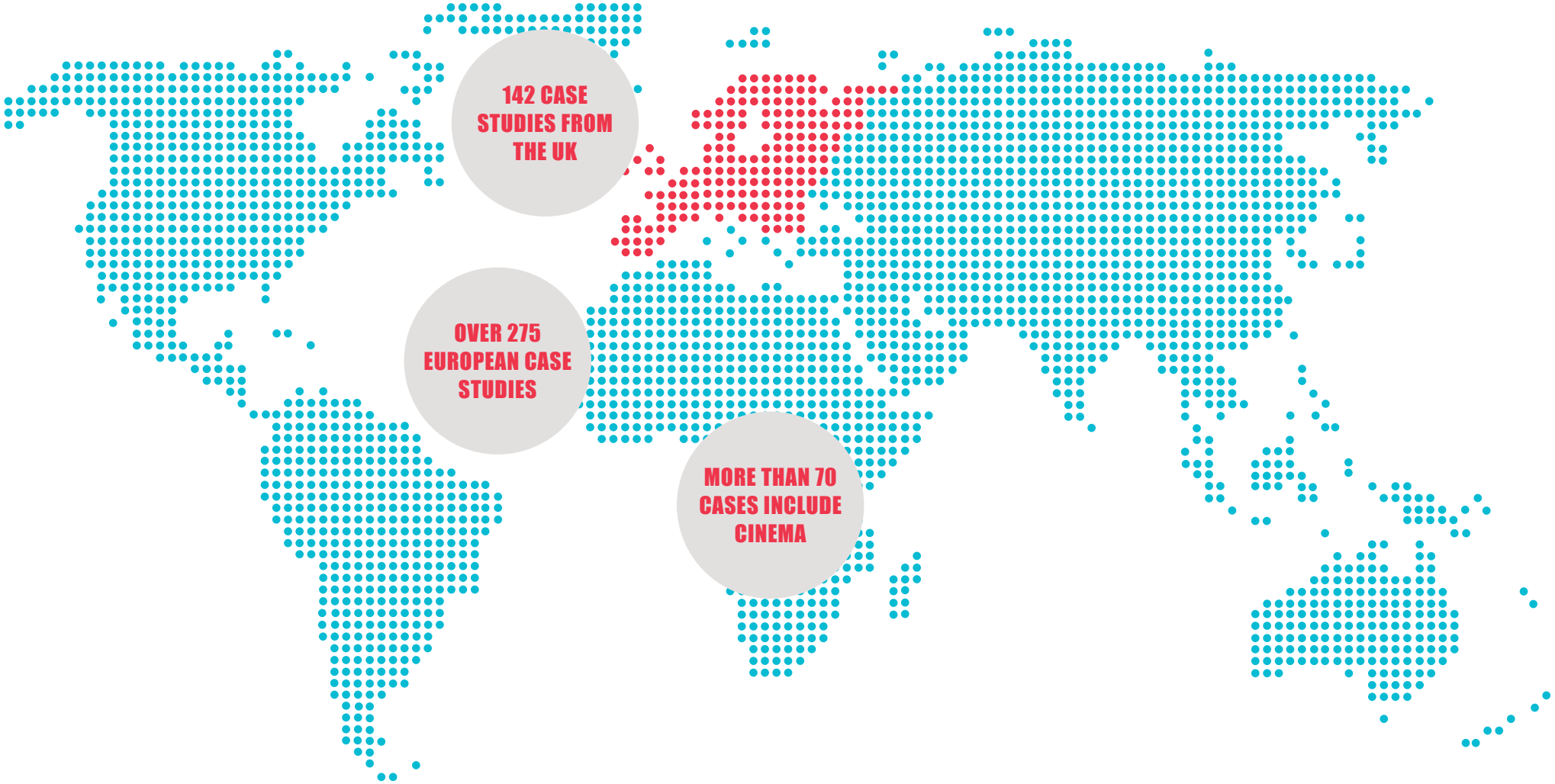
CORE BRAND-BUILDING METRICS



THE METHODOLOGY

HOW THE STUDY WAS DONE

Kantar Millward Brown have a comprehensive databank of European CrossMedia case studies – with half of these coming from the UK.



UNPICKING BRAND IMPACT DELIVERED BY ADVERTISING

BRAND METRIC

Brand Metric
First, Millward Brown takes a brand metric for a specific brand.

The Base (Non-Media) Contribution
Millward Brown then identify any **underlying involvement factors** and **ongoing influences** that can influence a consumer's view of a brand and control for these within the modelling:

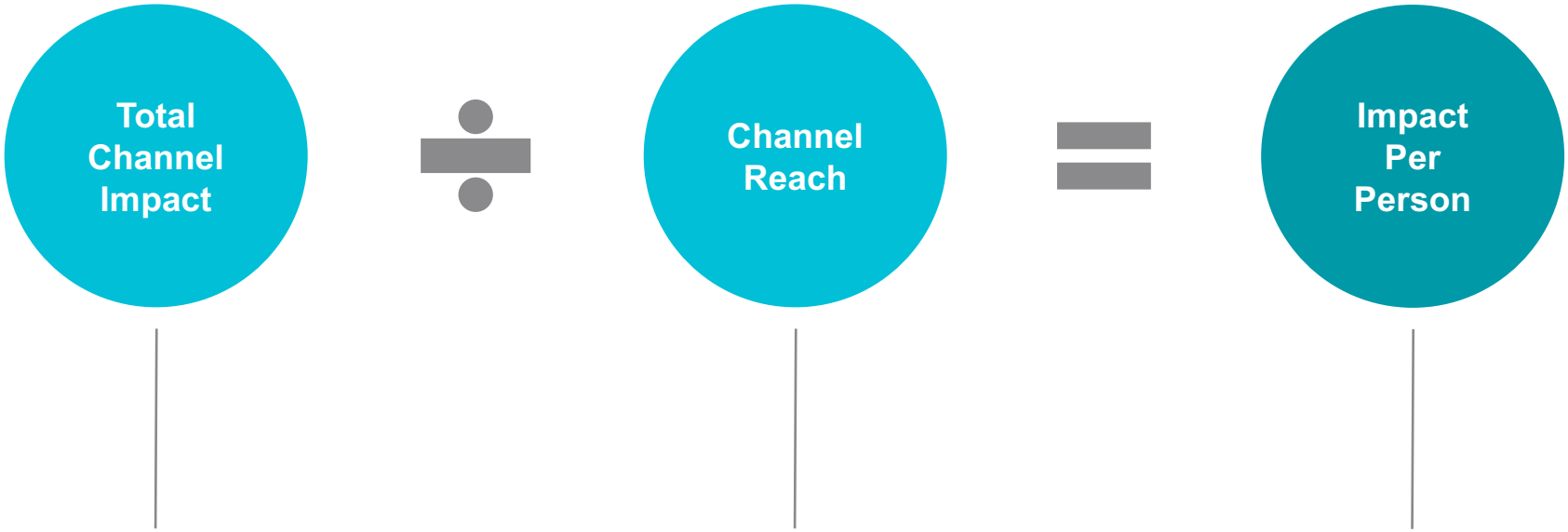
– Category interest
– Media bias
– Brand involvement
– Purchase behaviour
– Previous campaigns
– News coverage
– Word of mouth

The Media Contribution
Finally, Millward Brown identify the actual campaign influence of the media channels on top of these other factors through sophisticated modelling based on:

– Detailed media consumption habits – Viewership, listening, readership habits etc.
– Online behaviour

THE METRICS – IMPACT PER PERSON

Creating a level playing field to compare the contribution of different media channels



Total contribution to a key metric delivered by a media channel

Reach of each amongst the brand's target audience

Performance of each media channel among those who have been exposed

CINEMA MAKES BRANDS MEMORABLE

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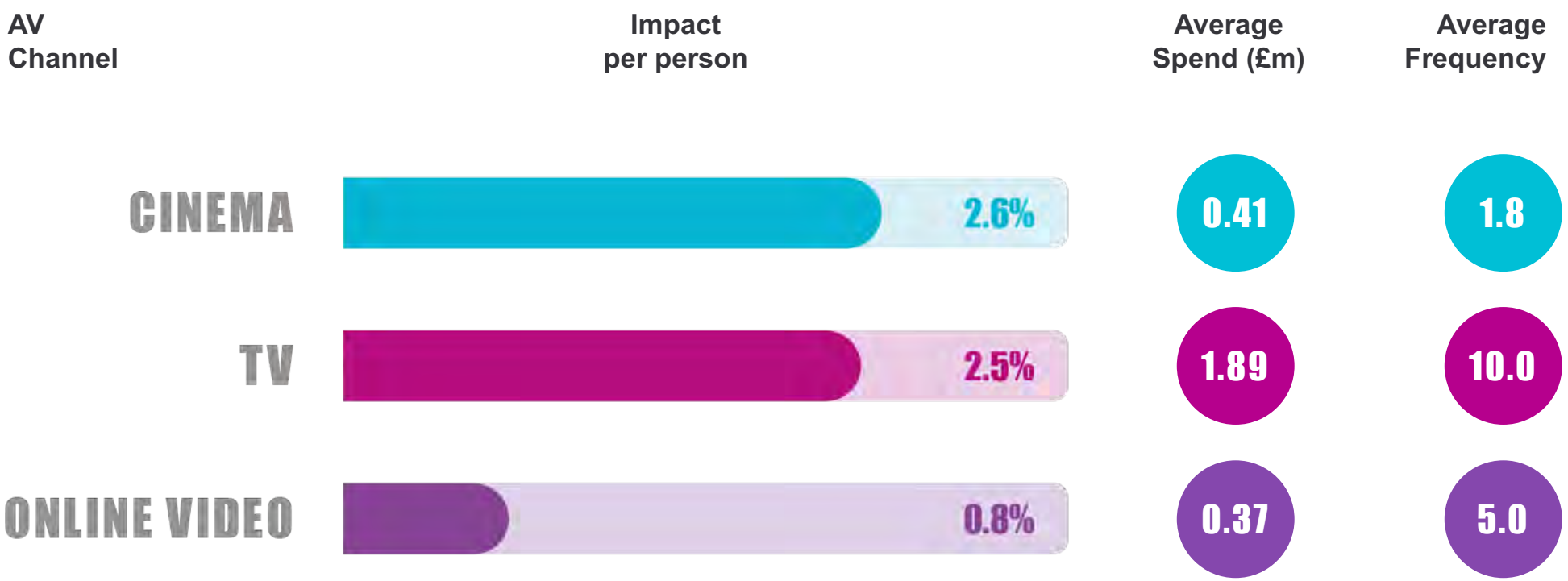
KANTAR MILLWARDBROWN

"You remember the last time I saw you?" – Moonlight

BRAND SALIENCE

Cinema and TV are most valuable AV media contributors to awareness per person reached.

AV Contribution to Brand Salience



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KANTAR MILLWARDBROWN

Source: Kantar Millward Brown CrossMedia Database, European data
Awareness KPI: Top of mind, prompted brand awareness, communications awareness
Cinema: 68 | TV: 262 | Online Video: 112

U

CINEMA CREATES A BRAND LOVE STORY

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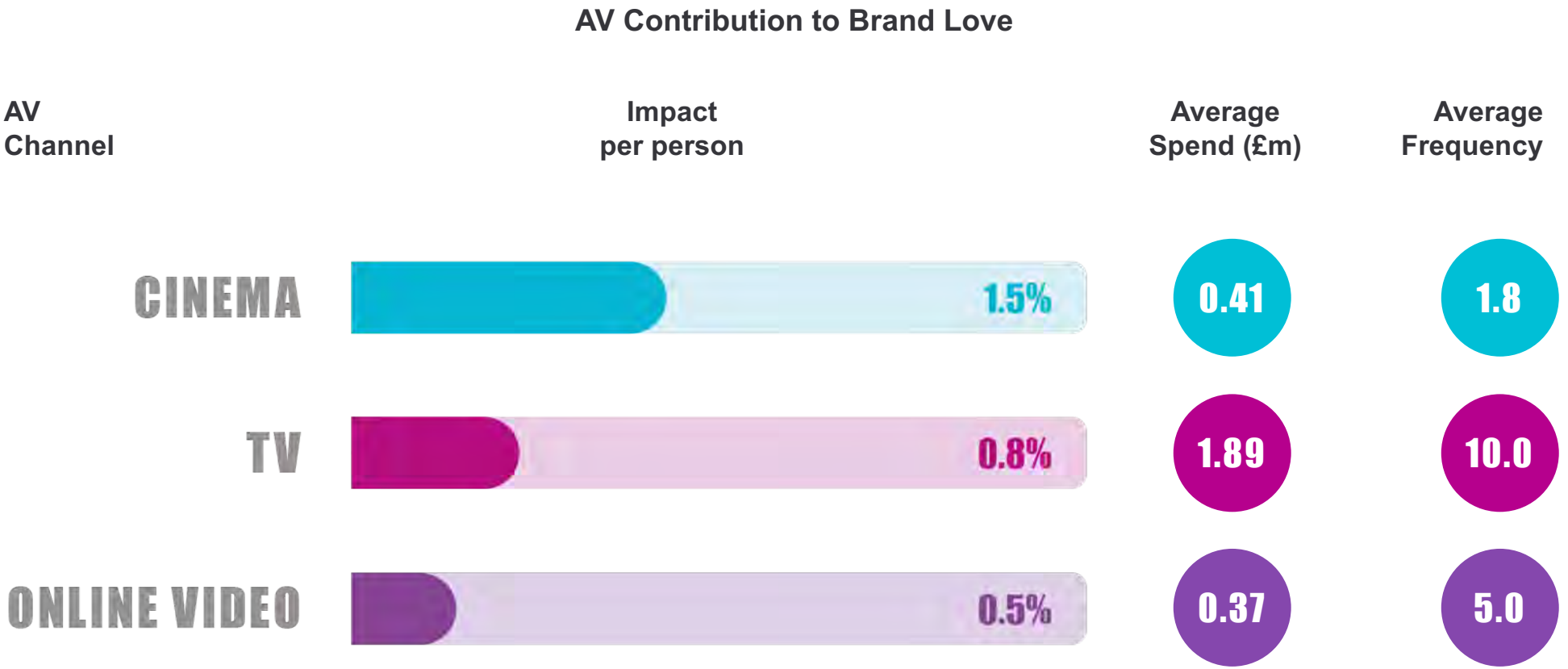
KANTAR MILLWARDBROWN

"Only love will truly save the world" – Wonder Woman

BRAND LOVE

Cinema delivers 3x the impact of online video on brand love and delivers almost twice the contribution of TV per person reached.

AV Contribution to Brand Love



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KANTAR MILLWARDBROWN

Source: Millward Brown CrossMedia Database, European data
Love metric: Love, meets needs
Cinema: 42 | TV: 122 | Online Video: 55

CINEMA TURNS AUDIENCES INTO CUSTOMERS

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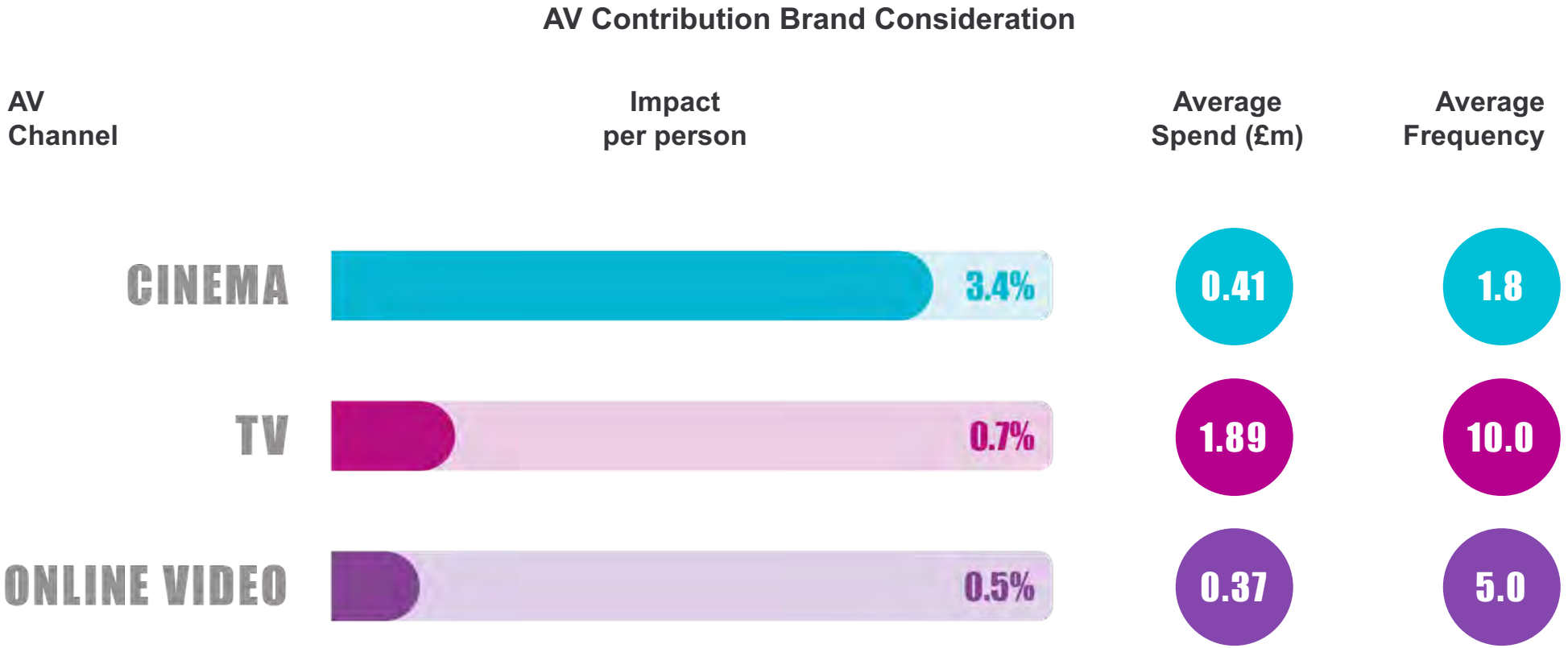
KANTAR MILLWARDBROWN

“I’ve considered every option” - Skyfall

BRAND CONSIDERATION

Of the AV channels, cinema delivers the biggest impact per person reached on this crucial metric.

AV Contribution Brand Consideration



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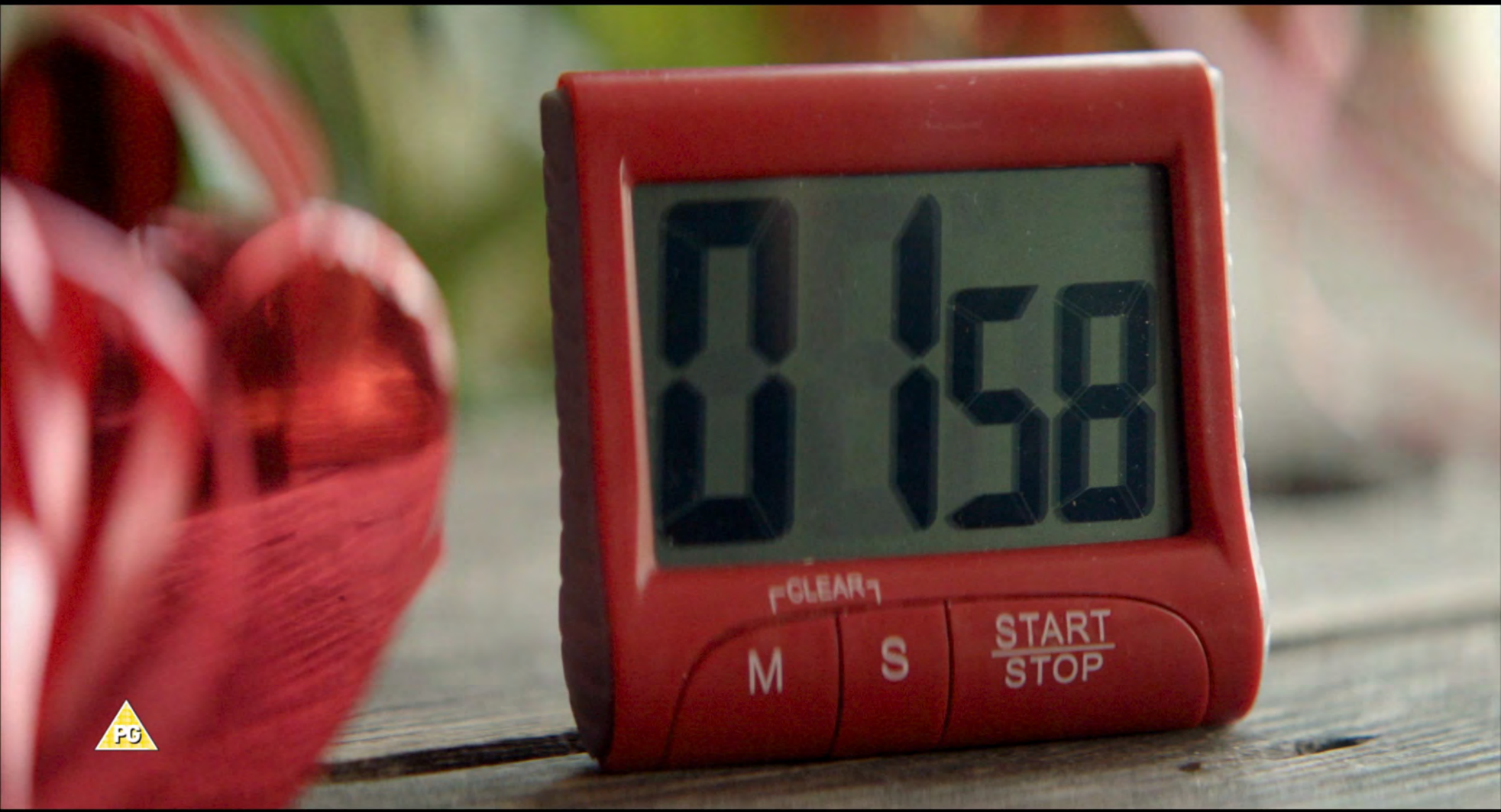
KANTAR MILLWARDBROWN

Source: Millward Brown CrossMedia Database, European data
Very/Quite likely Consideration scores
Cinema: 58 | TV: 229 | Online Video: 110


01:58
CLEAR
M
S
START
STOP
PG

FIVE KEY TAKEAWAYS

1. CINEMA MAKES BRANDS MEMORABLE

2. CINEMA CREATES A BRAND LOVE STORY

3. CINEMA MAKES BRANDS FEEL DIFFERENT

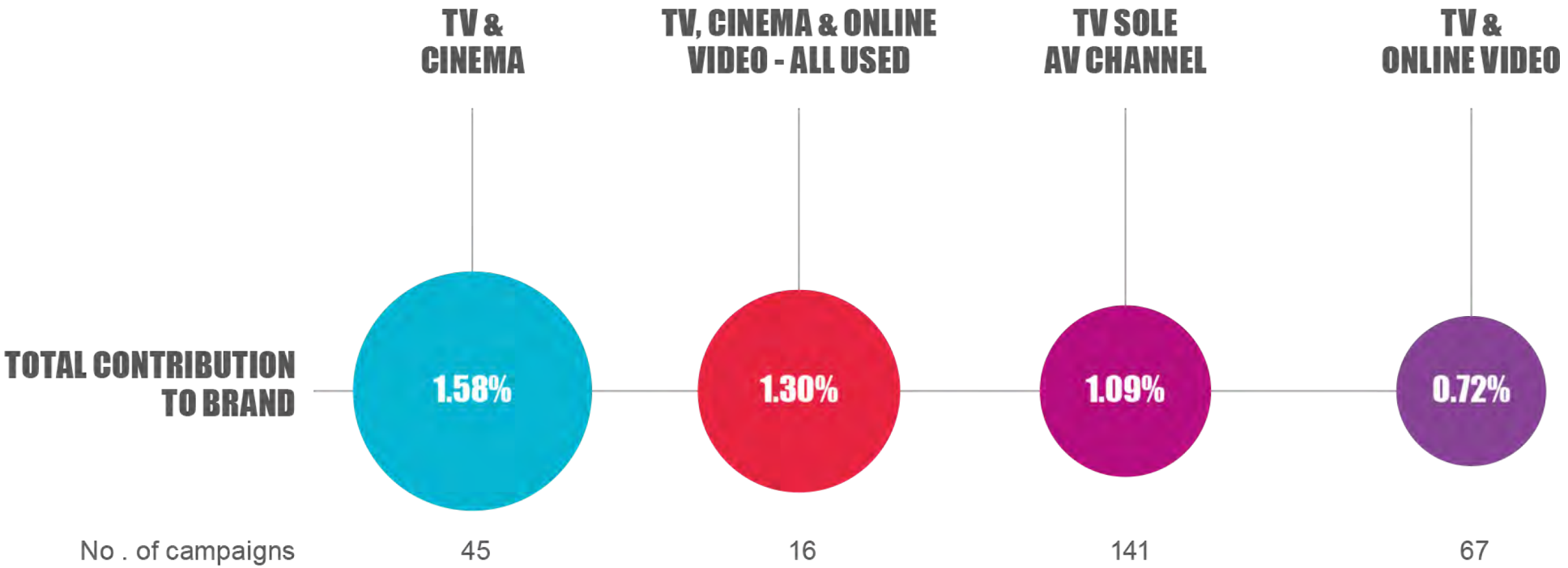
4. CINEMA TURNS AUDIENCES INTO CUSTOMERS

5. CINEMA WINS INFLUENTIAL FANS FOR BRANDS

“BRACE FOR IMPACT”
CHESLEY SULLENBERGER, SULLY

THE IMPACT OF AV CHANNELS

Analysis demonstrates how adopting a multi-screen strategy that has cinema in the mix can have the greatest influence and contribution towards brand building metrics.



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KANTAR MILLWARDBROWN

Source: Kantar Millward Brown CrossMedia Database, European data
Online video includes VOD

IMPLICATIONS

Cinema can deliver significant impact for brands and should be an essential part of the AV mix. These results can help inform the planning of your next campaign in three ways:

CINEMA SHOULD BE INCLUDED ON EVERY BRAND'S AV SCHEDULE

CINEMA SHOULD BE PLANNED AS 'APPOINTMENT TO VIEW' PROGRAMMING

MAXIMISE CINEMA CREATIVITY

‘NO ONE COUNTS THE NUMBER OF ADS YOU RUN; THEY JUST REMEMBER THE IMPRESSION YOU MAKE’

Bill Bernbach
Co-Founder, DDB

HOW TO BUY CINEMA.

NICK PRICE

Agency Manager, Digital Cinema Media

CINEMA IS A DYNAMIC MEDIUM

7 days
Turnaround to
get on-screen

8x
Reduction in
production costs

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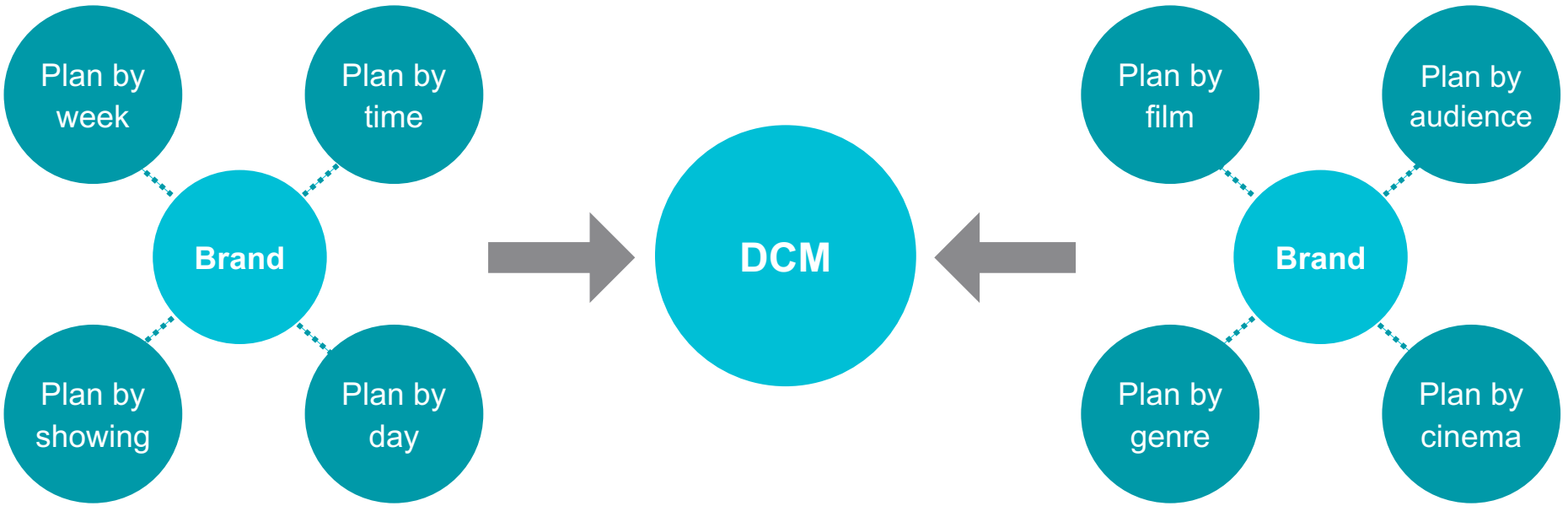
Source: DCM 11.02.13 Production cost reduced by average of 80% since 28.09.12 vs. 28.09.11. Lead times from 6 weeks to 1 week

YOU CAN PLAN YOUR CINEMA CAMPAIGNS...

…dynamically.



THE CINEMA PLAYLIST

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THE MOST PRESTIGIOUS POSITIONS IN ADVERTISING ARE AVAILABLE

THE GOLD, SILVER & BRONZE SPOTS

Take advantage of the most prestigious positions in advertising

Have your ad sit side-by-side with the greatest content in media, and in front of the most engaged audience, at an appointment to view occasion. Give your creative the impactful spot it deserves.

89%
of cinemagoers seated when Bronze Spot begins
+15% rate card

93%
of cinemagoers seated when Silver Spot begins
+30% rate card

100%
of cinemagoers seated when Gold Spot begins
+60% rate card

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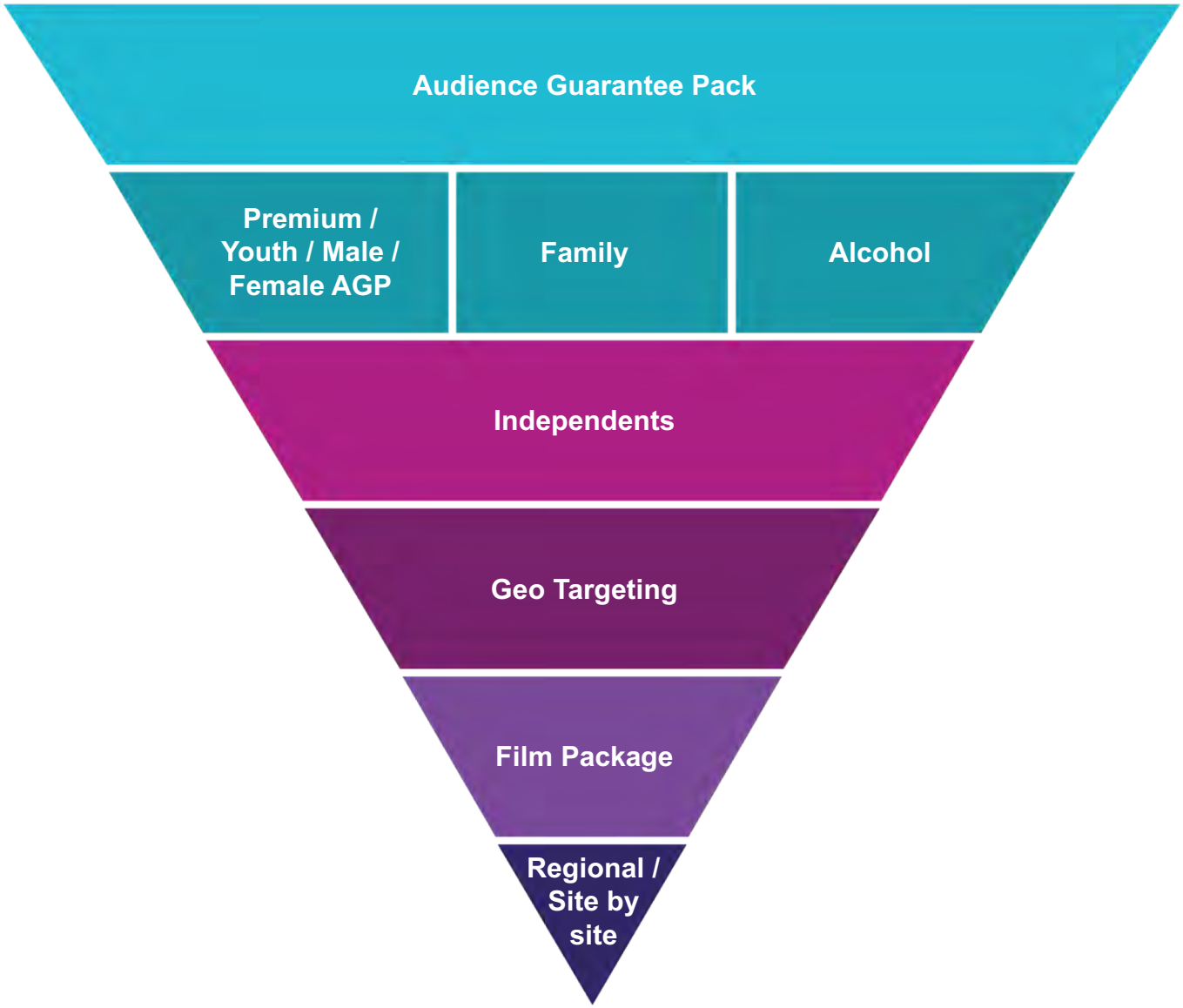
Source: Assosia

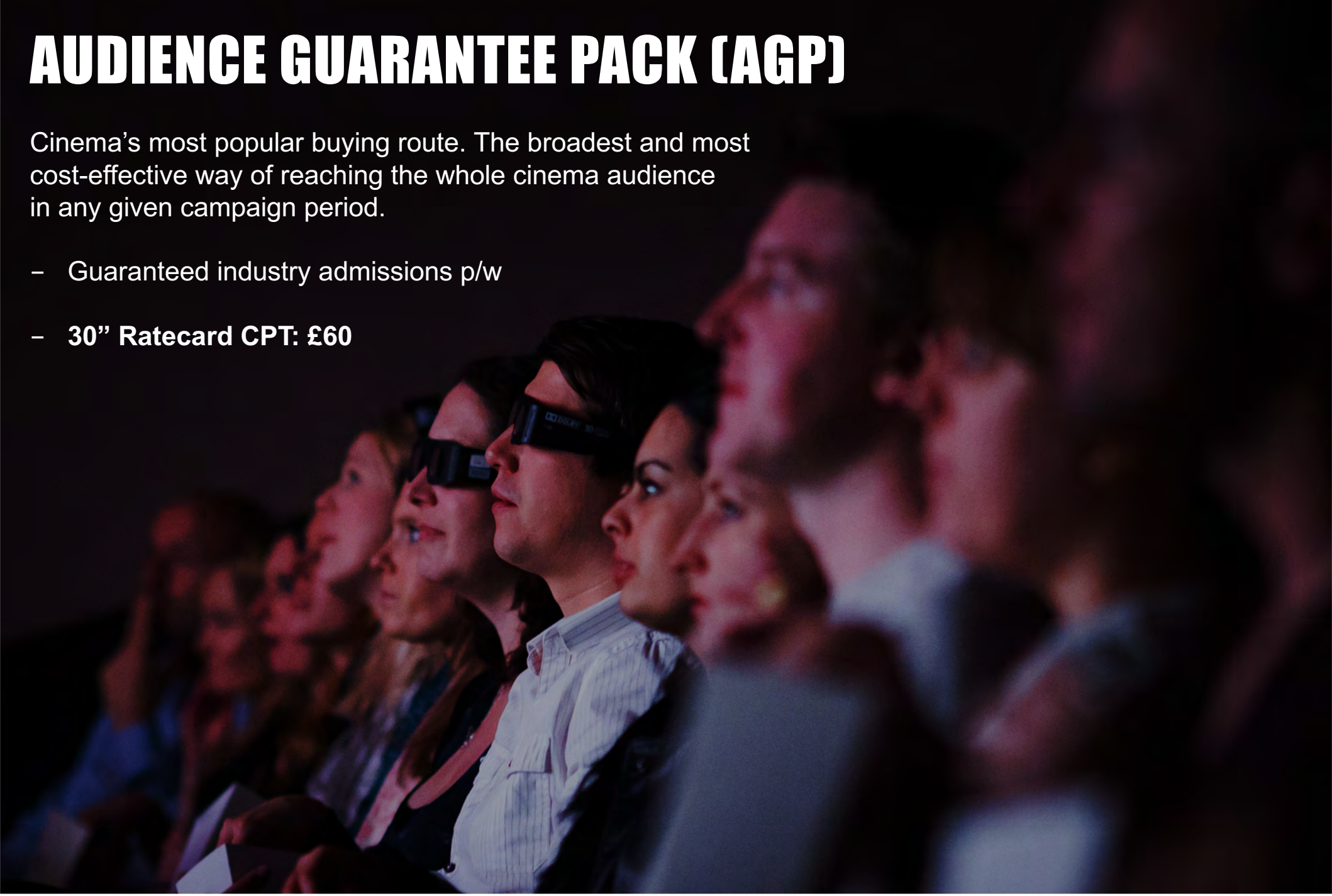
CINEMA BUYING ROUTES



AUDIENCE GUARANTEE PACK (AGP)

Cinema's most popular buying route. The broadest and most cost-effective way of reaching the whole cinema audience in any given campaign period.

- Guaranteed industry admissions p/w
- **30" Ratecard CPT: £60**



ALCOHOL/GAMBLING AGP

This package only includes films that profile 75%+ 18+ and have been approved by the alcohol directive at the CAA as suitable for this type of advertising. An extra film filter allows bespoke audience targeting.

- Bar sponsorships are available, with 30% of our sites featuring a bar on the premises

- **30” Ratecard CPT: £70**

GEO-TARGETING PACK

Using Cinemapper, DCM's cinema proximity planning tool, you can run national campaigns with a local spin for every region, city, town or cinema across the UK via local end frame messaging.

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FAMILY PACK

Engage with families during all family releases over a given period, especially during school holidays and tap into a hard to reach housewives and kids audience.

- Releases fall in school holidays
- **30” Ratecard CPT: £34**

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FILM PACK

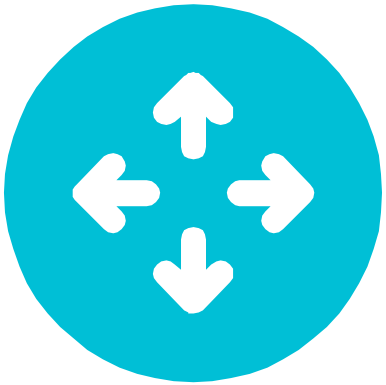
Film packages allow you to select individual films that profile well against your target audience and engage cinemagoers, while gaining powerful brand association with the hype and excitement around an eagerly anticipated release.

- Choose national or regional targeting

- **30" Ratecard CPT: £80/£100/£120**

M&S
PRESENTS

SUMMARY



Digital & flexible

7 days lead time

Audience targeting

Bespoke packages

Premium spots

Film association

HEADS, SHOULDERS OR TAILS.

MICHAELA WEBB

Agency Assistant, Digital Cinema Media

Q1

WHO IS DCM OWNED BY?

HEADS	ODEON & VUE
SHOULDERS	ODEON & CINEWORLD
TAILS	CINEWORLD & VUE

ODEON
FANATICAL ABOUT FILM
COSTA

cineworld
PITCH PERFECT 2
SUPER HEROES
25% OFF

Q2

HOW MANY INDUSTRY CINEMA ADMISSIONS WERE THERE IN 2017?

HEADS	170m
SHOULDERS	168m
TAILS	171m

171m

Q3

WHICH OF THESE IS A BOUTIQUE CINEMA IN MANCHESTER?

HEADS	Home
SHOULDERS	House
TAILS	Garage

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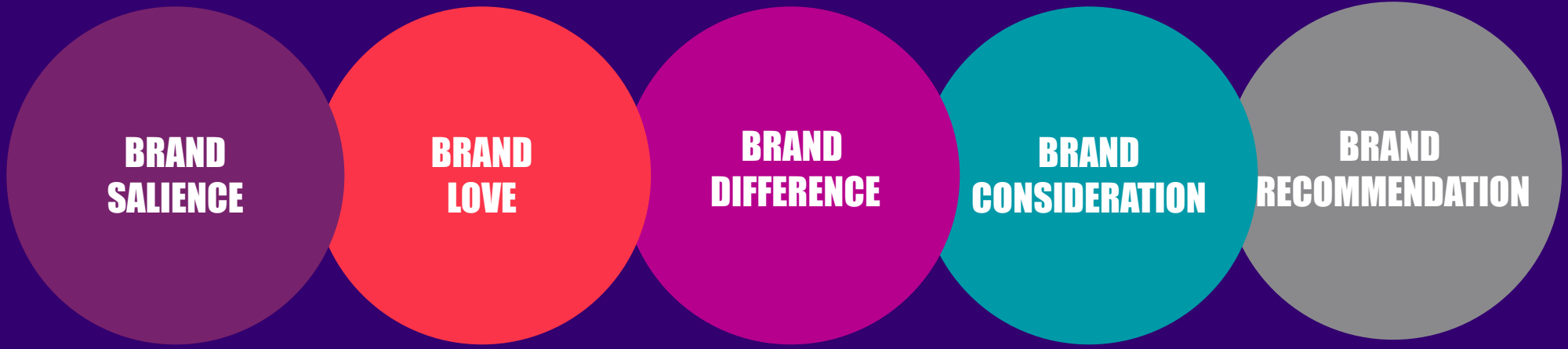
Q4

WHICH OF THESE IS NOT A CORE BRAND BUILDING METRIC?

HEADS	Brand Style
TAILS	Brand Salience
SHOULDERS	Brand Difference


BRAND SALIENCE
BRAND LOVE
BRAND DIFFERENCE
BRAND CONSIDERATION
BRAND RECOMMENDATION

Q5

HOW MANY TRAILER VIEWS DID THE LATEST AVENGERS: INFINITY WAR TRAILER RECEIVE ONLINE IN 24 HOURS?

HEADS	181m
SHOULDERS	177m
TAILS	179m

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Q6

HOW MUCH DID BLACK PANTHER TAKE IN ITS OPENING WEEKEND IN 2018?

HEADS	£17.7m
SHOULDERS	£14.6m
TAILS	£15.3m

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BEYOND THE BIG SCREEN

ED MCCLARAN & CRAIG MCFARLANE

Innovation Manager & Senior Innovation Manager

THE BEST SEAT
IN MEDIA
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DCM STUDIOS

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THE FOUR PILLARS

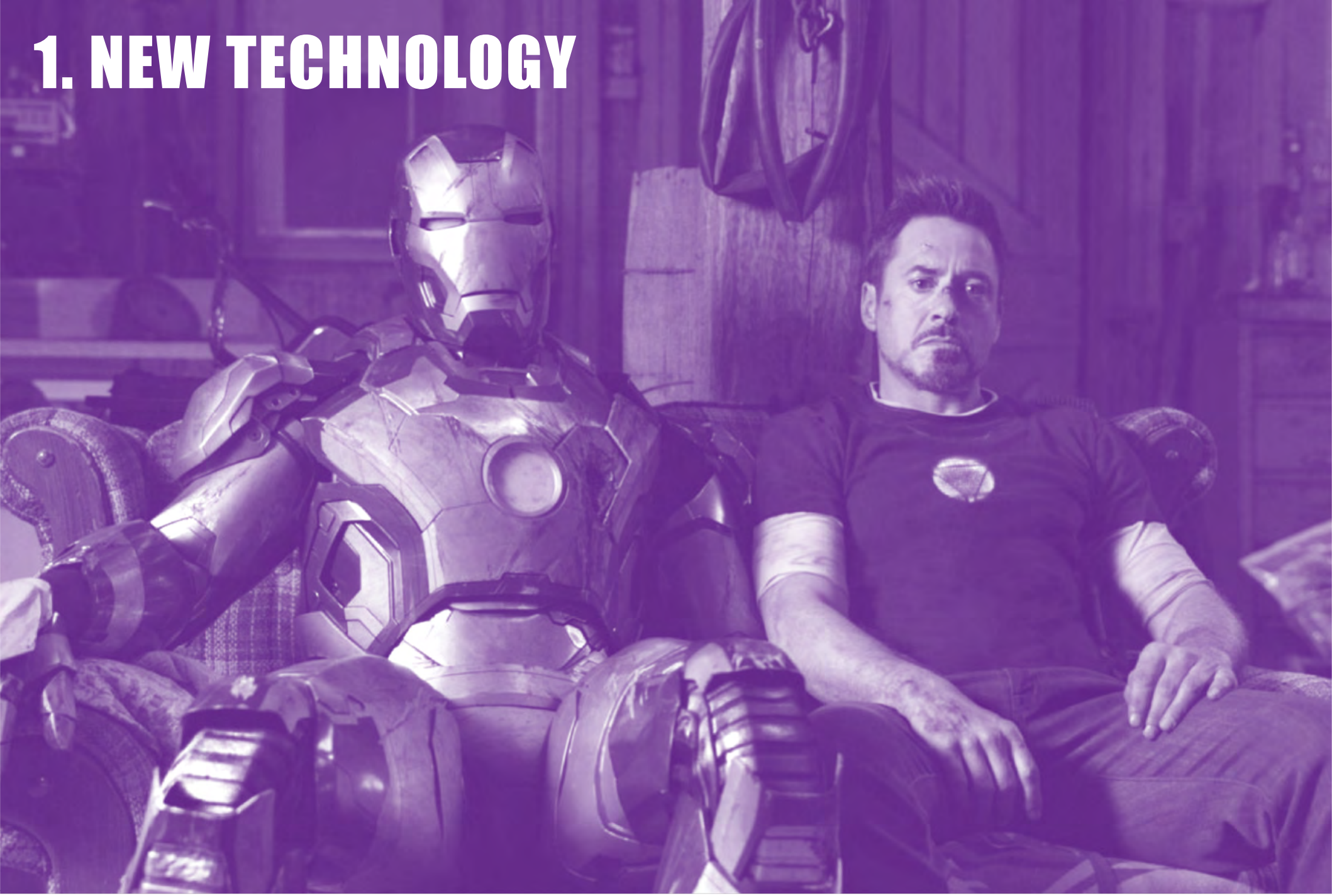
TECHNOLOGY

FILM CONTENT

FILM PARTNERSHIPS

CONTENT PRODUCTION

1. NEW TECHNOLOGY



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TECHNOLOGY

CONTINUING THE CONVERSATION

Social listening

Geo retargeting

PUSHING THE PRE-SHOW

Real time advertising

Live advertising

EXPANDING THE EXPERIENCE

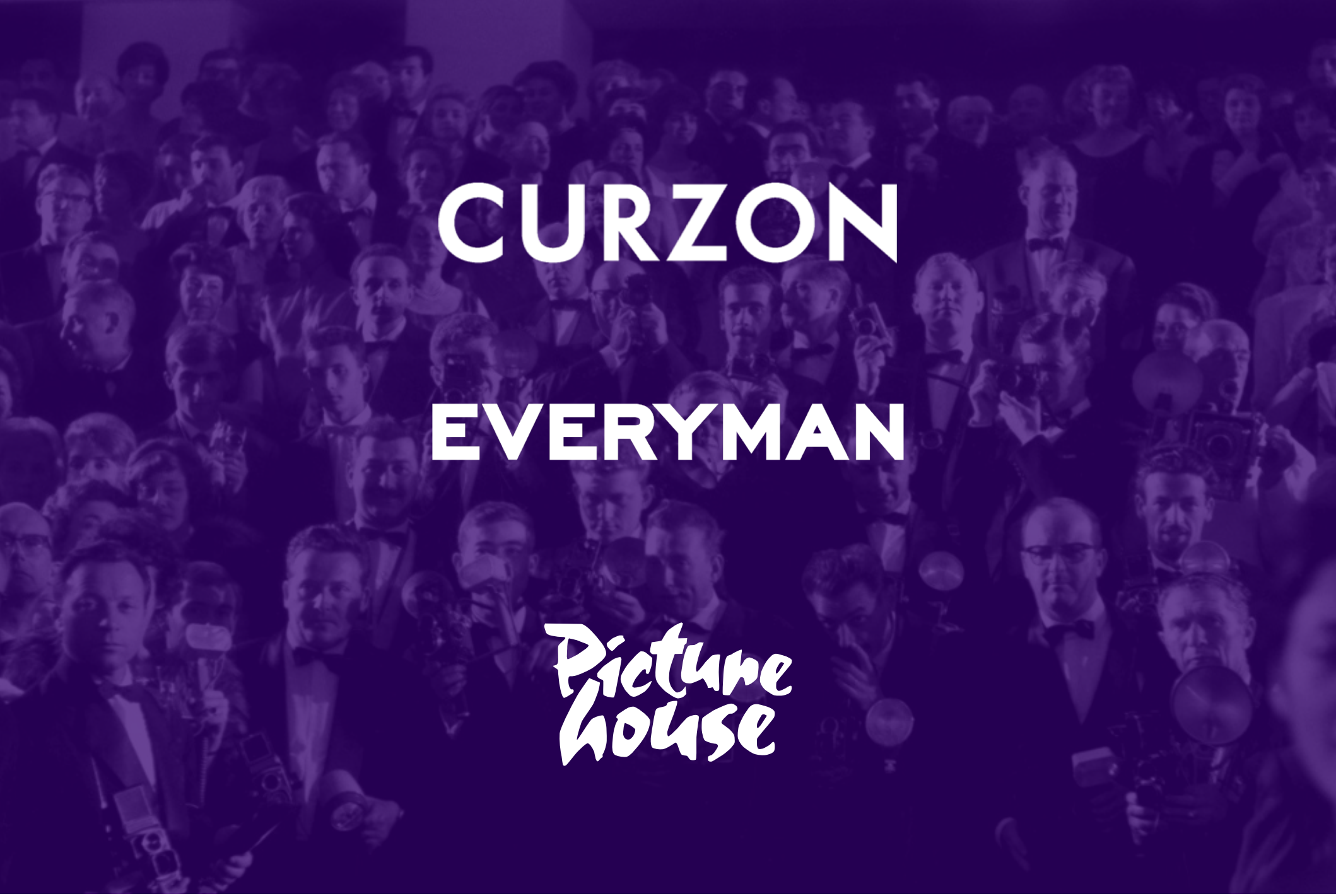
Projection mapping

VR, AR & MR

2. FILM CONTENT

OPENING WEEKS PACKAGE

The Opening Week Package allows one brand to sponsor the opening weeks of all Blockbuster films all year – engaging with early adopters at the forefront of the cinema experience.


CURZON
EVERYMAN
Picture house

EXPERIENTIAL

CERVEZA INTERNACIONAL
San Miguel
EXPLORANDO EL MUNDO DESDE 1890
PRESENTS
Picture House
POP UP

3. FILM PARTNERSHIPS

MAX FACTOR X
— PRESENTS —

A TUTORIAL INSPIRED BY

THE CLASSIC LOOKS IN THE MOVIE

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CINEMA PARTNERSHIPS

Go above & beyond, delivering added stand out in the most impactful medium

There's something for all audiences…

Kids Clubs
Parent & Baby Clubs
Family Matinees

16-34

Blockbuster Opening Wks
IMAX
4DX

ABC1

Awards Season
Headline Partners
Film Seasons

55+

Silver Cinema
Membership Screenings
Vintage Sundays

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cineworld

CURZON · CINEMAS

EVERYMAN

ODEON

Picture House

VUE CINEMAS

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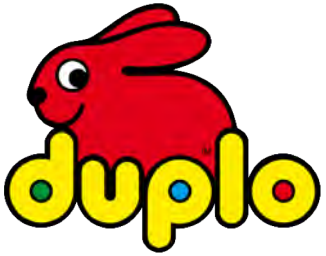
4. CONTENT PRODUCTION

CONTENT PRODUCTION



YOUR TURN TO CHALLENGE US

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THE LIVE BRIEF

SUMMER BAXTER

Agency Executive, Digital Cinema Media

THE LIVE BRIEF

Putting your cinema knowledge to the test!

What you need to do

- Team numbers are highlighted on your lanyards
- You have 45 minutes to come up with the best cinema solution for the brief
- No investment / No figures
- Simply create a cinema campaign idea taking into account everything you have learned this morning

THE LIVE BRIEF

PRODUCT: A craft gin brand
CAMPAIGN DATES: Long-term partnership, Q2-Q4 2018
TARGET AUDIENCE: Upmarket affluent adults

Objectives:

- Create a long-term association with film and cinema
- Maximise engagement with an upmarket, affluent audience
- Raise awareness of the craft of gin distillation
- Change perception of craft gin drinkers from ‘hipsters’ to a broader more affluent and premium audience
- Ensure there are opportunities to sample the brand
- Create an eye catching and engaging campaign

Considerations:

- There are limitations to the films that can carry alcohol advertising
- The creative impact of cinema lends itself to long copy ads or bespoke executions
- The cinema experience is more than just the film

THE LIVE BRIEF

What you need to do

- Be sure to hand in your idea to a DCM member of staff at the end of the break
- Your ideas will be judged during the rest of the presentation
- The winning team will be announced at the end of the course
- Each winning member will win a luxury cinema goody bag

SEE YOU BACK HERE IN 45 MINS

2018: A YEAR IN FILM.

TOM LINAY

Head Of Film, Digital Cinema Media

ANOTHER FANTASTIC YEAR FOR FILM.

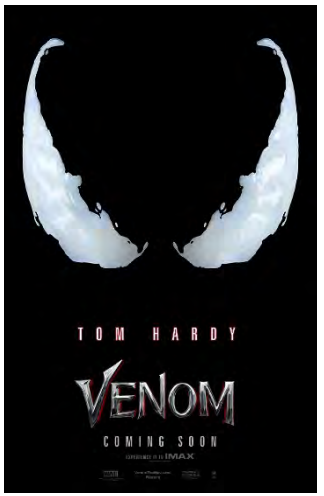
FILMS AIMED AT A MALE AUDIENCE

Some of the biggest franchises return

Avengers: Infinity War
26 April

Deadpool 2
15 May

Skyscraper
13 July



Venom
5 October

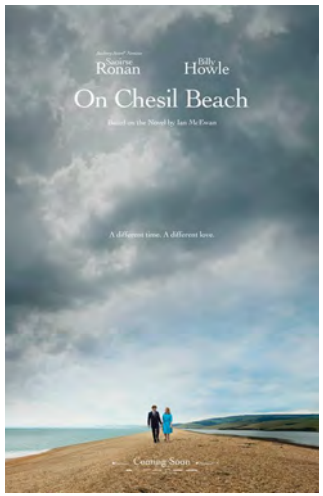
Johnny English Strikes Again
12 October

Aquaman
14 December

FILMS AIMED AT A FEMALE AUDIENCE

A big summer is in store

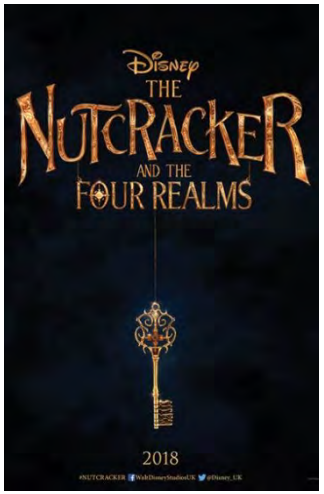
Tully
4 May



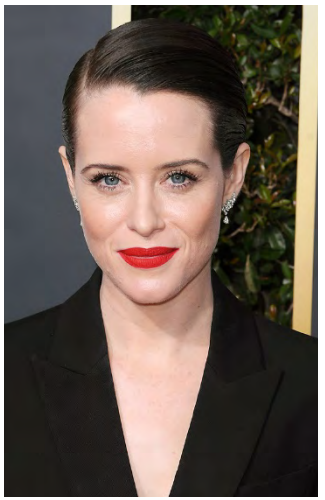
On Chesil Beach
18 May

Ocean's 8
22 June

A Star Is Born
5 October



The Nutcracker And The Four Realms
26 October

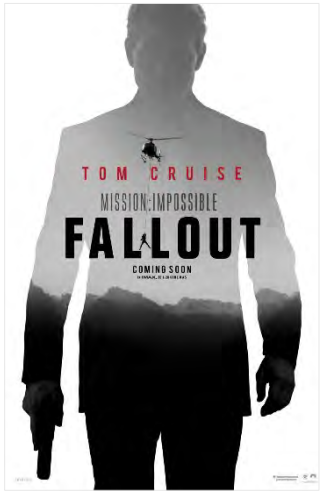


The Girl In The Spider's Web
26 October

UPMARKET FILMS

The best way to reach a premium ABC1 audience

Sicario 2: Soldado
29 June

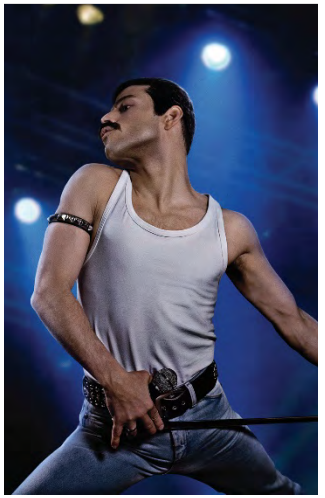


Mission: Impossible – Fallout
26 July

Mary, Queen of Scots
14 September

First Man
2 November

Widows
9 November



Bohemian Rhapsody
26 December

FAMILY

Some huge animations get the sequel treatment

Sherlock Gnomes
11 May

Incredibles 2
13 July

Hotel Transylvania 3
27 July

Disney's Christopher Robin
17 August

The Grinch
9 November

Wreck-It Ralph 2: Ralph Breaks The Internet
30 November

THE REALLY BIG FILMS.

SOLO: A STAR WARS STORY

24 May 2018

JURASSIC WORLD: FALLEN KINGDOM

6 June

MAMMA MIA! HERE WE GO AGAIN

20 July

FANTASTIC BEASTS: THE CRIMES OF GRINDELWALD

16 November

MARY POPPINS RETURNS

21 December

2019 BLOCKBUSTERS

The biggest year in UK cinema history?

Avengers Infinity War 2
3 May 2019

Toy Story 4
21 June 2019

The Lion King
19 July 2019

Bond 25
October 2019

Frozen 2
27 November 2019

Star Wars Episode 9
20 December 2019

LIVE BRIEF WINNER

THANK YOU.