WELCOMETO AN INTRODUCTION TOCHNEMA



AGENDA

Why cinema

- **2.** The cinema marketplace
- **3** Mission 16-34: Launch, Land, Impact
 - Power of cinema within AV
- **5.** How to buy cinema
 - DCM Studios
- Live Brief

2019: A year in film





4

6.

8.

MAY CINEMA

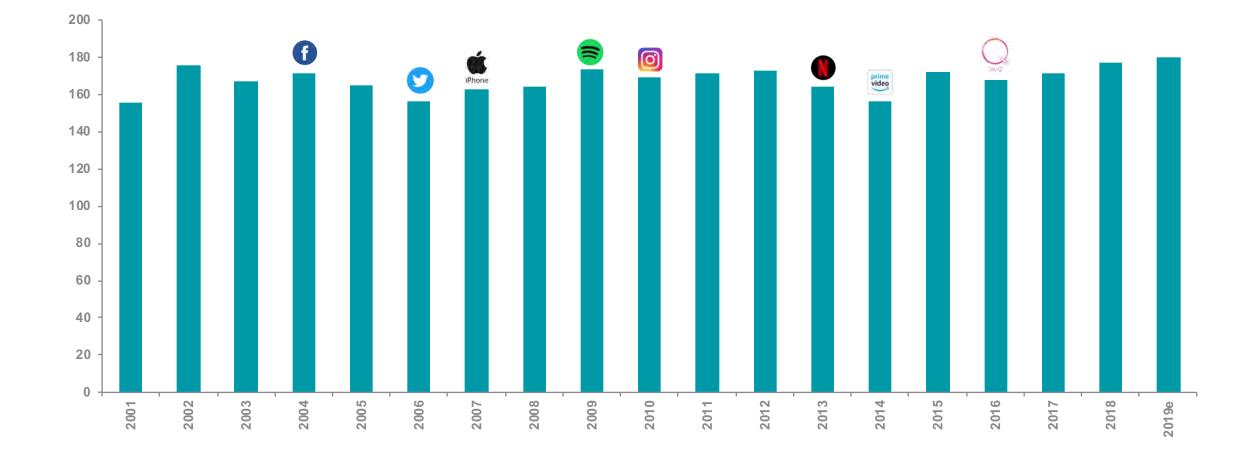
Emyr John, Agency Manager



CINEMA ADMISSIONS ARE STRONG & STABLE



STANDING THE TEST OF TIME





CINEMA ADMISSIONS HAD THEIR BEST YEAR SINCE 1971



CINEMA ADMISSIONS & AD REVENUE GROWTH





UK CINEMA – BOX OFFICE

2000 – £639m

2006 – £762m

2015 – £1.2bn

2016 – £1.3bn

2017 – £1.4 bn

2018 - £1.4 bn

2019 est. - £1.4bn



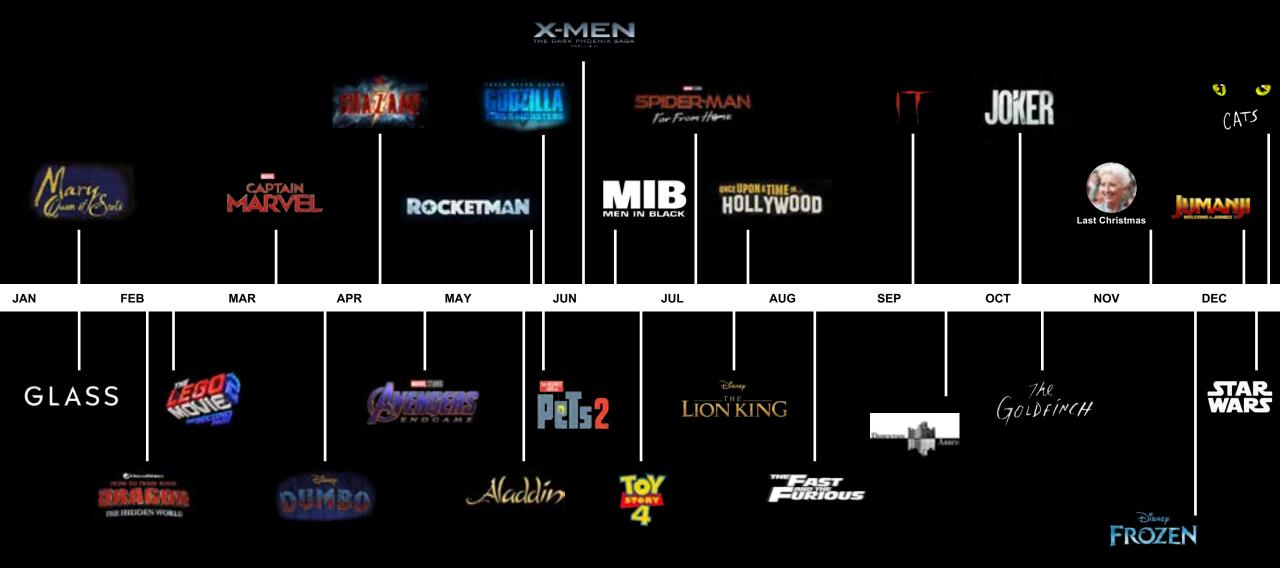
2018 TOP TEN

1. AVENGERS: INFINITY WAR	£70.8m
2. MAMMA MIA: HERE WE GO AGAIN	£65.5m
3. INCREDIBLES 2	£56.0m
4. BLACK PANTHER	£50.5m
5. THE GREATEST SHOWMAN	£42.4m
6. JURASSIC WORLD: FALLEN KINGDOM	£41.6m
7. PETER RABBIT	£40.9m
8. DEADPOOL 2	£32.7m
9. BOHEMIAN RHAPSODY	£29.5m
10. A STAR IS BORN	£25.7m





2019 FILM SLATE





CINEMA HAS NEVER BEEN MORE RELEVANT



UNDIVIDED ATTENTION

A UNIQUE & ENGAGING ENVIRONMENT

UNDISTRACTED AUDIENCE

MAKING CINEMA AN EVENT



FIGHT FOR ATTENTION

FRACTIOUS TREND IN MEDIA CONSUMPTION

DECLINING 16-34 AUDIENCES ACROSS OTHER MEDIA

NOT ALL IMPACTS ARE EQUAL



UNIQUE CONTENT

16 WEEK THEATRICAL WINDOW IS GOING NOWHERE

800+ RELEASES IN 2018 (MORE THAN DOUBLE 2008) CONSISTENTLY STRONG FILM SLATE



IT'S NOT JUST THE AUDIENCE FLOCKING TO CINEMA

Superstars turn to the big screen



Beyoncé The Lion King

Donald Glover The Lion King

Lady Gaga A Star is Born



THE ULTIMATE APPOINTMENT TO VIEW







KEY INFORMATION



Audience 90% are cinemagoers 50/50 Male/Female



Admissions & frequency
77m admissions forecast in 2019
44% of all UK admissions
7.7 Visits per year vs. avg of 6

CINEMA BEHAVIOUR



Attend 3 Average group size 44% Friends 33% As a couple



Foyer Average dwell time 23 minutes



Regional skew 34% London



Upmarket 57% ABC1



Key footfall periods Opening weekend + first week Wednesday, Friday, Saturday



Technology

54% Browse internet on phone in foyer52% Share their cinema trip on social media



THE BEST SEAT IN MEDIA





THE CINEMA MARKETPLACE

Samantha Butters, Agency Manager

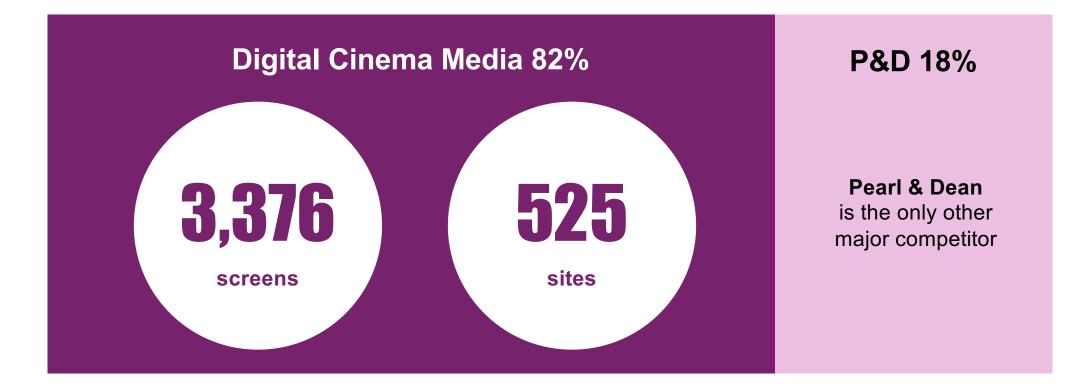


UK CINEMA – THE NUMBERS

/ / /



DCM REPRESENTS 82% OF THE UK MARKETPLACE





DCM'S PARTNERS



PLUS 160+ INDEPENDENT CINEMAS



INVESTMENT IN THE CINEMA EXPERIENCE











CINEWORLD SCREEN X (12)

THE SEREEN





BIGGEST CINEMA IN LONDON







CTUREHOUSE CENTRAL



#INTROTOCINEMA

CURZON RICHMOND



EVERYMAN LIVERPOOL





2019 GROWTH

26 CINEMAS 5N ADNISSIONS



COMING SOON...



VUE Eltham April / 6 screens



ODEON Leeds Thorpe Park April / 9 screens Dolby Vision (ATMOS, HDR, 6 more coming)



Everyman Manchester May / 3 screens



BUILDING BOX OFFICE BRANDS IV MADE AND, IMPACT

Michael Tull, Research and Insight Manager



THE APPROACH

EXPLORE AV HABITS

15 participants were recruited from across the UK (Birmingham, Edinburgh, London & Manchester)

They took part in a **5-day online community** designed to capture AV habits and explore the role of different content

12 participants were invited to the cinema where they were exposed to a typical 11-min ad reel in-situ

DEFINE

CINEMA

EXPERIENCE

They took part in **90 minute focus group** designed to unearth the specifics of the cinema experience and define the impact of cinema advertising **QUANTIFY** *KEY THEMES*

Nationally representative sample of **1,000 16-34s completed a 15 minute survey** designed to further understand and quantify the themes discovered in the Explore & Define stage

Differentology also undertook a **meta-analysis of 12 cinema ad effectiveness projects** to understand the average uplifts delivered by cinema.

HOW CINEMA CAN HELP BRANDS ENGAGE WITH THE 16-34 AUDIENCE





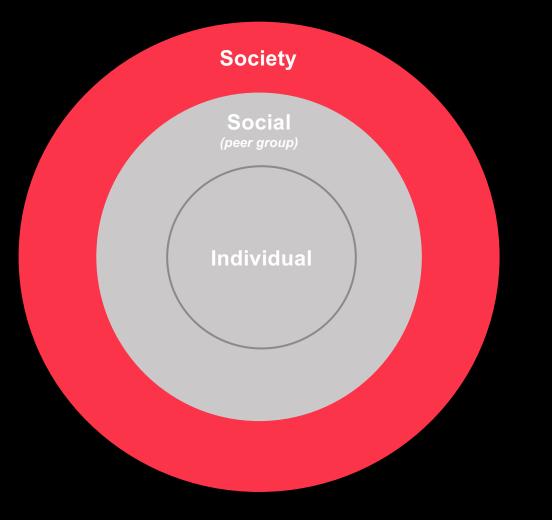
CINEMA PROVIDES CULTURAL MOMENTS

Cinema brings people together from all walks of life, and delivers 'big moments'. It is the entry point for shared stories we follow over years or even decades.

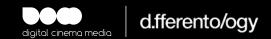
25%* of all 16-34s in the UK went to see *Avengers: Infinity War* at the cinema (where a decade long narrative came to a culmination).

They wanted to be part of the conversation.

51% OF 16-34s AGREE THEY "DON'T LIKE MISSING OUT ON THINGS THAT OTHER PEOPLE ARE TALKING ABOUT"



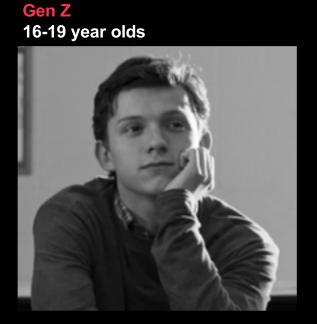
44%16-34 66% I GHT TV



Source: 1. 3.3m admissions / 44% = DCM Planner industry data 2018. 2. 66% = GB TGI Q3 2018.

16-34S ARE MOST RECEPTIVE TO CINEMA ADS

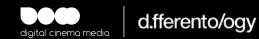
Cinema ads are the advertising format that both Gen Z & Gen Y are most positive towards



Gen Y 20-34 year olds



Cinema ads	44%	34%
TV ads	14%	23%
Video ads (laptop/PC)	-24%	-20%
Video ads (mobile)	-26%	-26%





Spontaneous awareness +33% increase 'wagamama is a
 cool brand'
 +16% increase

UK like-for-like sales increased by 12.2% 10.1% UK outperformance of the market during this quarter





d.fferento/ogy digital cinema media

CINEMA OCCUPIES A UNIQUE ROLE IN THE WORLD OF AV

Top 3 associations by platform

LIVE TV		VOD		YOUTUBE		SOCIAL VIDEO		CINEMA	
Fill time	30%	Binge viewing	27%	Fill time	43%	Fill time	38%	Shared experience	37%
Background viewing	26%	Fill time	25%	Helps me escape	28%	Low Attention	27%	High attention	34%
Comforting	18%	Quality content	19%	Binge viewing	27%	Spontaneous	20%	Quality content	31%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



72% OF 16-34s AGREE

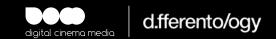
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE WORLD CAN'T INTRUDE"

66% OF 16-34s AGREE

THAT "I PAY MORE ATTENTION TO ADS IN CINEMA THAN ELSEWHERE"

70% OF 16-34 'AD AVOIDERS' AGREE

THAT "I TALK TO THE PEOPLE I GO TO THE CINEMA WITH ABOUT THE ADS (WHILST WATCHING THEM)"





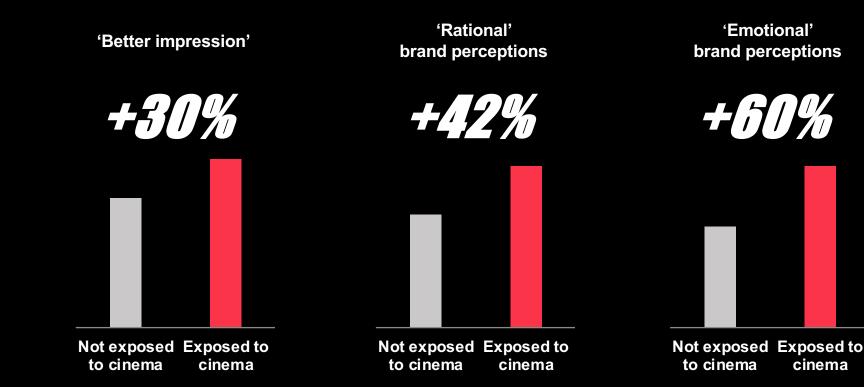
BRANDS CAN BENEFIT FROM A TRANSFER OF POSITIVE ATTRIBUTES

PREMIUM		TRUSTWORTHY A	DS	POSITIVE TOWAR BRAND	POSITIVE TOWARDS A BRAND		
Cinema	48%	Cinema	36%	Cinema	30%		
TV	17%	TV	31%	TV	25%		
YouTube	16%	YouTube	16%	YouTube	20%		
Social Media	11%	Social Media	10%	Social Media	17%		
VOD	9%	VOD	9%	VOD	8%		

ADS MAKE YOU FEEL MORE

CINEMA DELIVERS AT BOTH AN 'EMOTIONAL' AND A 'RATIONAL' LEVEL

<u>Meta-analysis of 12 recent cinema campaigns</u> 16-34 audience results



Meta-analysis consists of 12 campaigns from finance, travel, entertainment & leisure, FMCG and charity sectors Rational brand perceptions include: 'is value for money;, 'is good quality', 'is in convenient locations for me' Emotional brand perceptions include: 'is a brand I love', 'is a brand I'm passionate about, 'is an inspirational brand''. Top 3 agree scores for brand perceptions

KEY FINDINGS

The unique cinema experience creates an **immersive**, **non-intrusive**, **'bubble' of attention** that no other AV format can provide. Brands can benefit from a **positive transfer of attributes** that cinema possesses including being seen as **premium and trusted**. The immersive 'bubble' of cinema is also the perfect environment to land key messages –both emotional & rational – and creating a better brand impression.

REPOSITIONING

THE POWER OF THE P

Sarah Dack, Head of Research and Insight



PIVOTAL COVER

QUALITY ENGAGED IMPACTS

LAUNCH SPOTS 1+ IN WEEK REACH BUILD



INDUSTRY GOLD STANDARD





TOP TEN 16-34 – 2018 FILM RELEASES

1. AVENGERS: INFINITY WAR	26 TVRs
2. BLACK PANTHER	24 TVRs
3. INCREDIBLES 2	19 TVRs
4. DEADPOOL 2	18 TVRs
5. THE GREATEST SHOWMAN	15 TVRs
6. MARY POPPINS RETURNS	14 TVRs
7. JURASSIC WORLD: FALLEN KINGDOM	14 TVRs
8. MAMMA MIA: HERE WE GO AGAIN	14 TVRs
9. BOHEMIAN RHAPSODY	11 TVRs
10. VENOM	11 TVRs



TOP 16-34 PROGRAMMES ITV1 2018

England vs. Croatia WC 2018	30 TVRs
Avengers: Infinity War	26 TVRs
England vs. Colombia WC 2018	25 TVRs
Black Panther	24 TVRs
England vs. Belgium WC 2018	20 TVRs
Deadpool 2	18 TVRs
Jurassic World: Fallen Kingdom	14 TVRs
I'm a Celebrity Get Me Out of Here!	13 TVRs
Britain's Got Talent	12 TVRs
Croatia vs. Denmark WC 2018	12 TVRs



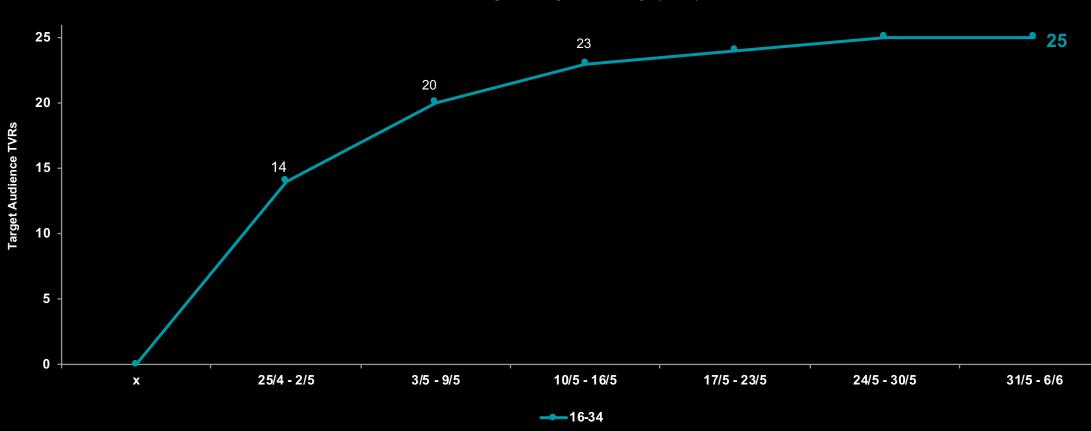
PREDICTED TOP TEN 16-34 FILM RELEASES: 2019

1. THE LION KING	27 TVRs
2. AVENGERS: ENDGAME	25 TVRs
3. TOY STORY 4	19 TVRs
4. IT: CHAPTER TWO	16 TVRs
5. STAR WARS: EPISODE IX	16 TVRs
6. FROZEN 2	14 TVRs
7. CAPTAIN MARVEL	13 TVRs
8. SPIDER-MAN: FAR FROM HOME	11 TVRs
9. KINGSMAN 3	10 TVRs
10. DUMBO	10 TVRs



LAUNCH YOUR CAMPAIGN WITH AVENGERS: ENDGAME

High reach, low frequency – Constantly reaching new people



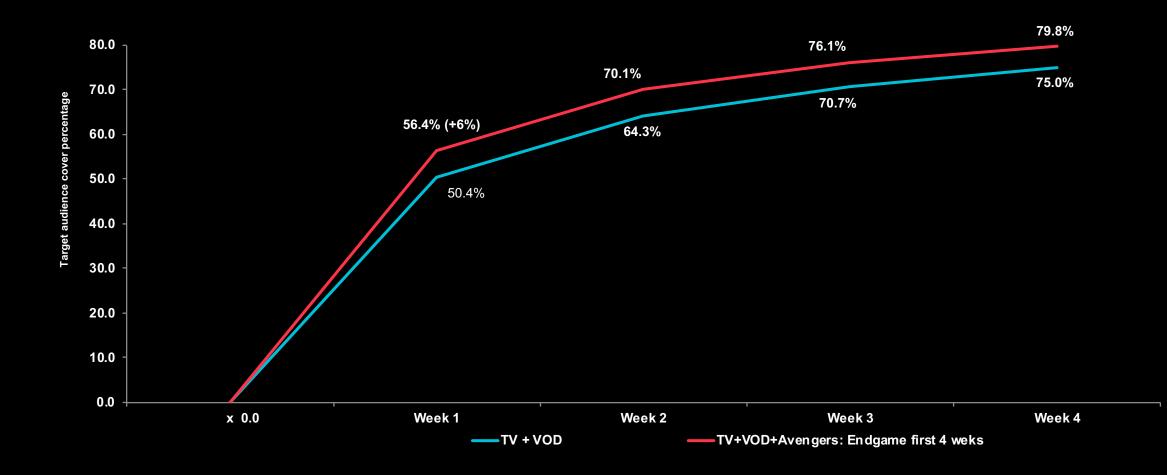


AUDENCES

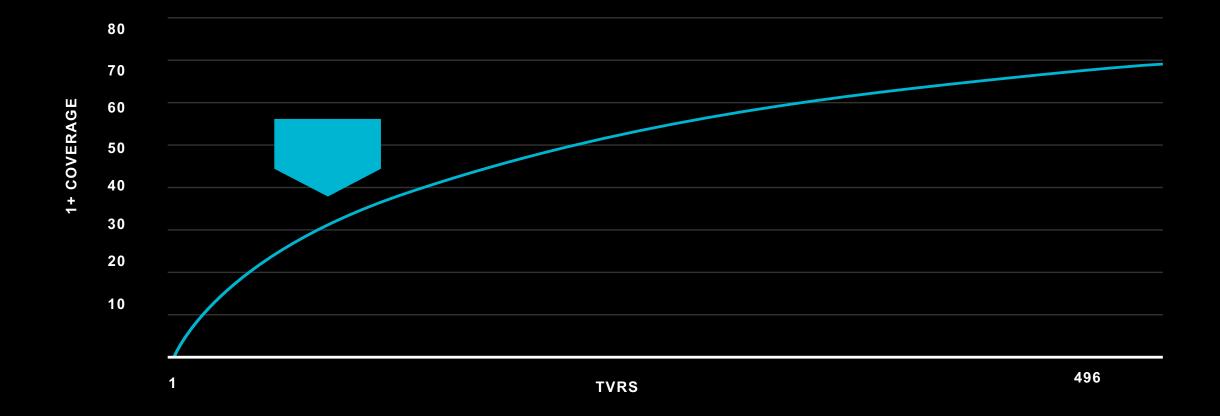


LAUNCH SPOTS BUILD PIVOTAL COVER

300 TVRs. 6m VOD impacts. 4 Weeks Avengers: Endgame Film Pack ratings



WHICH MEANS ITS ROLE IS HERE...



HOW TO BUY CINEMA

Emma Morrisroe, Agency Manager



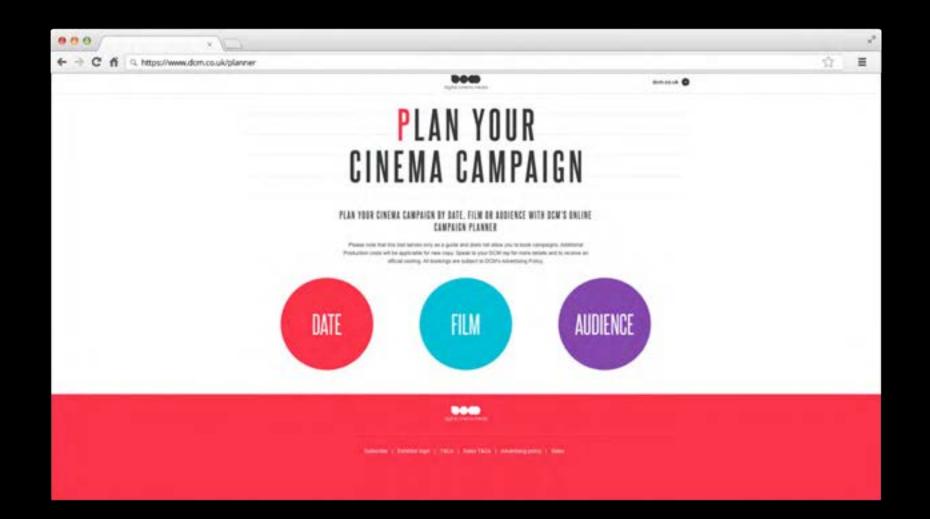
CINEMA IS A PREMIUM, BRAND SAFE, TRUSTED ENVIRONMENT







YOU CAN PLAN YOUR CINEMA CAMPAIGNS DYNAMICALLY





PRODUCTION It's easier than ever to be on the big screen



- 10-

WE CAN GET YOU ON THE BIG SCREEN IN 72 HOURS



MORE FLEXIBILITY WITH LATE MONEY



THE CINEMA PLAYLIST



Average reel length: 11 minutes



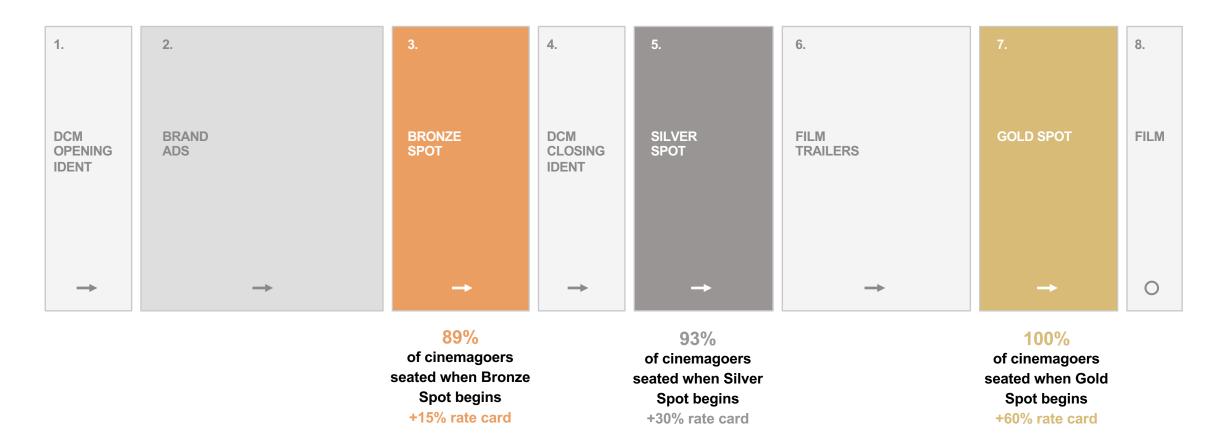
THE MOST PRESTIGIOUS POSITIONS IN ADVERTISING ARE AVAILABLE



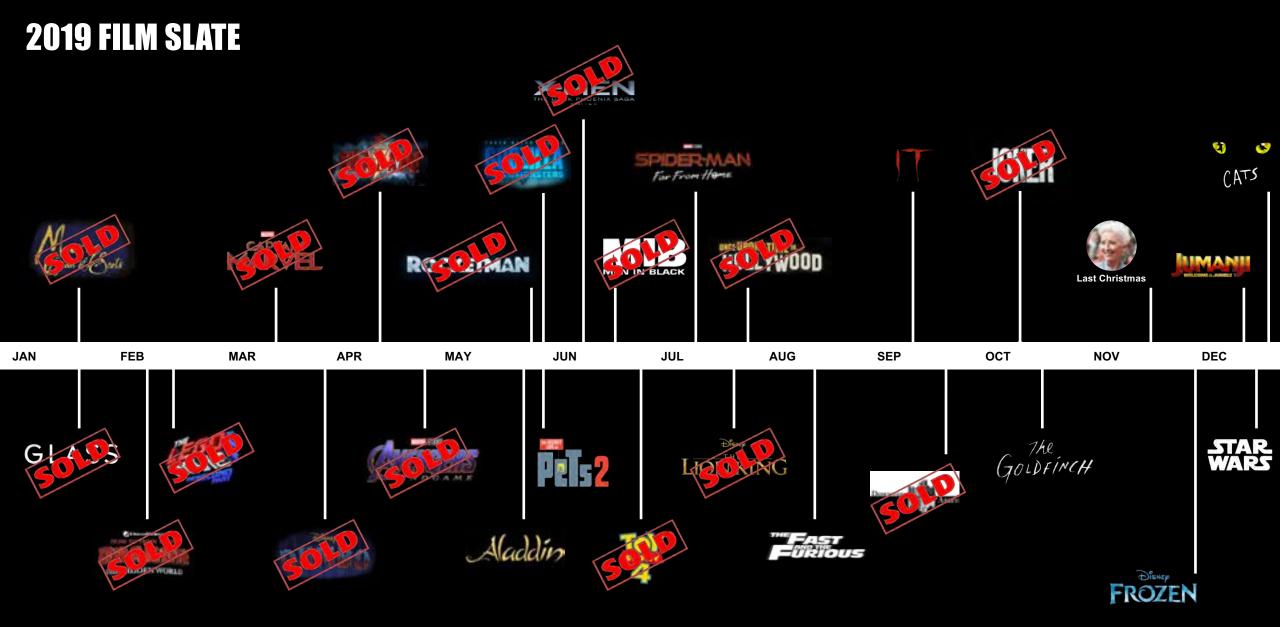
THE GOLD, SILVER & BRONZE SPOTS

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.





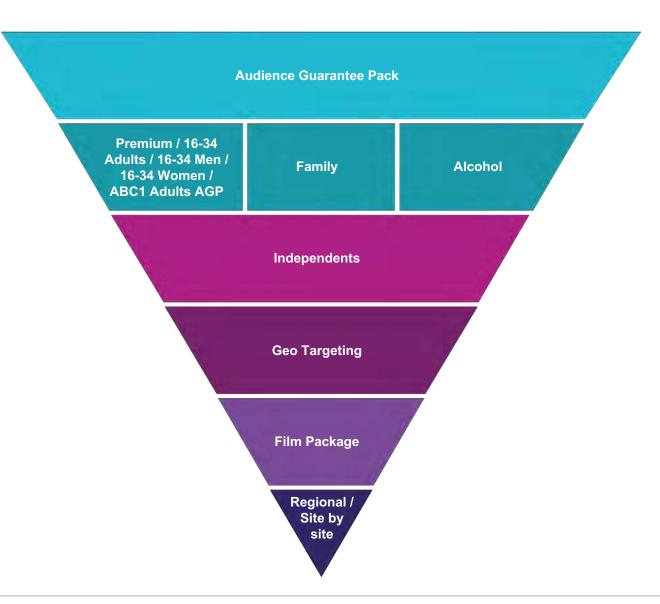




30" CREATIVE ACCOUNTS FOR 50% OF CAMPAIGNS



CINEMA BUYING ROUTES





AUDIENCE GUARANTEE PACK (AGP)

Cinema's most popular buying route.

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



ALCOHOL/GAMBLING AGP

Only includes films that profile 75%+ 18+ and have been approved by the alcohol directive at the CAA.

- Bar sponsorships are available, with 30% of our sites featuring a bar on the premises
- 30" Ratecard CPT: £70



REGIONAL AND SITE BY SITE TARGETING

- Opportunity to buy cinema nationally or regionally
- Also offer cinema on a site by site basis
- Regions split same as ISBA TV regions
- Rate Card price on application



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.



FAMILY PACK

Engage with families during all family releases over a given period.

- 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.

- Choose national or regional targeting **30" Ratecard CPT: £80/£100/£120**
- _



WHY YOU CAN TRUST CINEMA

Since becoming a fully digital operation in 2012 we offer an accountable and transparent process



We forecast admissions for each film, forming the basis of our buying routes. Over 4 years' worth of admissions data is used to inform average footfall by site and screen predictions



Cinemas update us daily on what movies they plan to show over the 7-14 days, by site, date and time so we can schedule adverts against them

3. TICKET SALES REPORTED

Box office ticket sales are delivered directly from the cinema's in house POS system or web portal to our Data Warehouse



If a film starts outside of its allocated time band, is cancelled, or is shown without our prior knowledge, these admissions are automatically detected and discarded. We only report admissions for films that have a live and accountable playlist and then allocate these to campaigns.



Each week, ComScore who independently measure 95% of worldwide box office data, collect admissions and report these to our campaign management team. This data is used to corroborate our own admissions, ensuring transparency



SUMMARY





Flexible late cash



Brand safe



HEADS Shoulders Tails

Elza Luksa, Agency Manager



WHO IS DCM OWNED BYP

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



SHOULDERS

DDEDN FANATICAL ABOUT FILM





HOW MANY INDUSTRY CINEMA ADMISSIONS WERE THERE IN 2018?

 HEADS
 171m

 SHOULDERS
 175m

 TAILS
 177m









WHICH OF THESE CHAINS WILL OPEN LONDON'S BIGGEST CINEMA SITE THIS YEAR?

HEADS SHOULDERS TAILS ODEON CINEWORLD PICTUREHOUSE









WHAT PERCENTAGE OF THE CINEMA AUDIENCE IN THE UK IS 16-345?

 HEADS
 44%

 SHOULDERS
 34%

 TAILS
 30%











HOW MANY INDUSTRY 16-34 MALE TVRS HAS CAPTAIN MARVEL DELIVERED TO DATE?

HEADS11 TVRsSHOULDERS19 TVRsTAILS15 TVRs









HOW MANY VIEWS DID THE LION KING TRAILER RECEIVE ONLINE GLOBALLY IN 24 HOURS?

HEADS SHOULDERS TAILS 200.8m 177.1m 224.6m

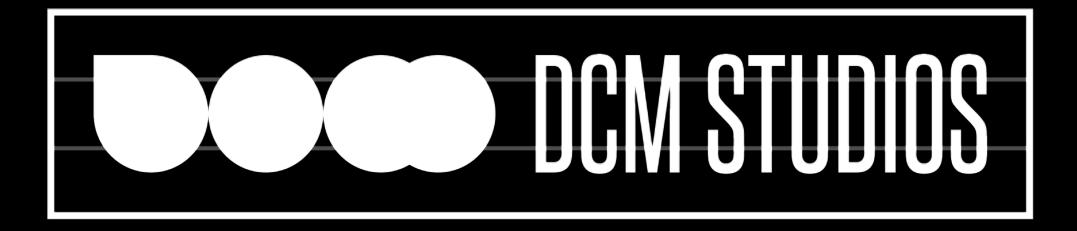








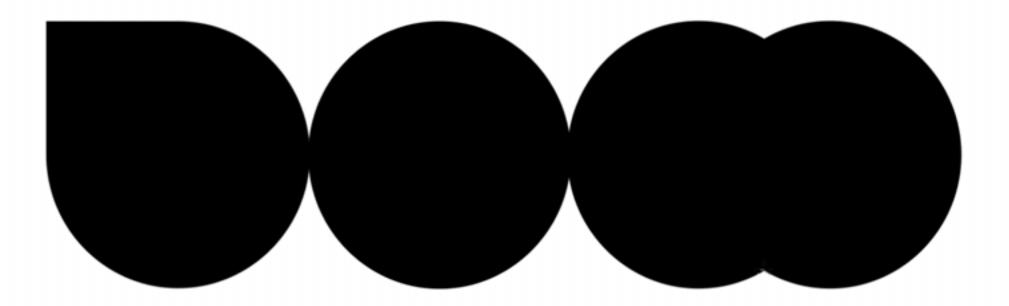




James Bottomley, Account Manager – DCM Studios & Miles Phillip, Senior Account Manager – DCM Studios

WE USE OUR KNOWLEDGE OF THE CINEMA AUDIENCE, FILM SLATE AND LATEST TECHNOLOGY TO CREATE CONTENT, EXPERIENCES AND PARTNERSHIPS FOR BRANDS LOOKING TO ENHANCE THE **CINEMA EXPERIENCE.**





DCM STUDIOS - CONTENT, EXPERIENCES, PARTNERSHIPS



Film slate



Film partnerships



Content creation



Technology



Events & experiences





Sponsorships







NATWEST

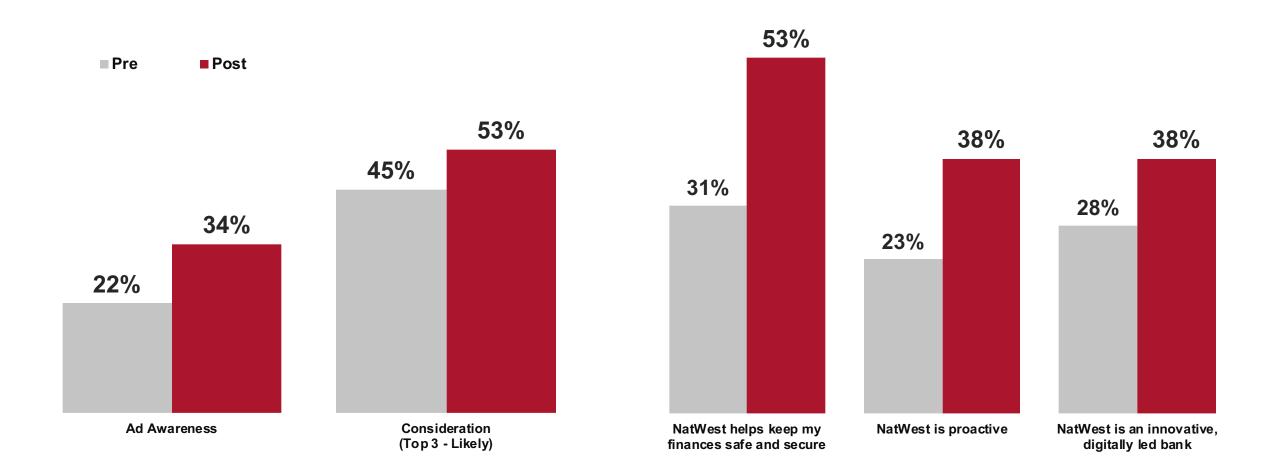
Oceans 8, Mission Impossible: Fall Out & First Man





NATWEST

'Safety and Security' - 2018







DCM STUDIOS

000039

CAM 075

REC

STATE THE PERSONNER THE GOAL HAD THE THE THE THE THE SHOULD BE AND ADD THE PERSONNEL THE THE THE THE THE SHOULD BE AND

COUNTER TERRORISM PR

itvNEWS



Real life foiled plots in new counter terrorism film



A new film has been released by counter terrorism police encouraging people to report surplicious behaviour. It will be shown in cinemas across the Midlands.

The Noshiobioths Healmourfaire of communities in Health's fight assist terration



Counter terror police have told LBC they have thwarted 18 terror attacks in the UK in the last two years.

The head of UK Counter Terrorism Policing Assistant Commissioner Neil Bass told Nick Ferrari that the most recent attack that they stopped was designed to maim and kill innocent victims.

He was speaking at the launch of a new advert, designed to encourage the public to report any suspicious activity to the police.

And he revealed the success that last year's TV advert had in helping to intercept secror cells before they carried out attacks - 14 Islamist attacks and four from the far-right.



He told LBC: "We're dealing with a record number of operations, over 700 and we've disrupted our 18th attack plot in this country. That is a significant change in tempo and pace and that hasn't receded.

"What has been great is we've worked incredibly hard to stop them, hence the 18 disrupted plots.





Associated Communities from Sociation in Programming From International

The possible of communications usual the authorities involve where some of the Decisi foreign fighters are overcases, but others they don't.

IN Beau and he was 'reproduly grateful' mad 2018 was spinnt the book of carbage of the provincy year, where ideary of people were killed in attacks in Landon and Hamberton'

However, he warned the "worst-case sceneric" was public completency.











MAX FACTOR

DOCD DCM STUDIOS

Murder On The Orient Express & The Greatest Showman

-

MAX FACTOR EVENTS

A HANK &

ater

DCM STUDIOS

MAXFACTORX

A TUTORIAL INSPIRED BY THE CLASSIC LOOKS IN THE MOVIE

444111.





BIGGER SCREENS...

Captive Audience

Longer Creative

4K



...TRUER SOUND

Make it part of the creative

Dolby Atmos







Dive into the Movie!

SCREEN X



YOUR TURN TO Ghallenge US



THE LIVE BREF

Bruno McKay, Agency Manager



WHAT YOU NEED TO DO

- Check your lanyard for your team number
- 45 minutes to come up with the best cinema solution for the brief
- Create a cinema campaign idea that answers the brief
- Take into account what we have spoken about this morning
- This is about ideas, we don't need the numbers



THE LIVE BRIEF

PRODUCT: A fragrance
CAMPAIGN DATES: Launch in June 2019 (30%), with support through key retail periods,
e.g. Black Friday, Christmas, etc (70%)
TARGET AUDIENCE: 16-34 Women

Objectives:

- Create a long-term association with film and cinema
- Maximise engagement with the key 16-34 audience
- Drive awareness and stand-out for the new fragrance
- Cut-through the noise within a cluttered category
- Ensure there are opportunities to sample the brand
- Create an eye-catching and engaging campaign that breaks category norms

Considerations:

- The brand wants to be seen as accessible luxury
- The creative impact of cinema lends itself to long copy ads or bespoke executions
- The cinema experience is more than just the film
- Awareness and sales will be the key measures of success





WHAT YOU NEED TO DO

 Hand your response to a DCM member of staff at the end of the break

 Your ideas will be judged during the rest of the presentation, and 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



2019: A YEAR IN FILM

Summer Baxter, Agency Executive & Chris Rogers, Agency Assistant





Delivering over 100 16-34 TVRs



Avengers: Endgame 25 April



Toy Story 4 21 June



The Lion King 19 July CRAPTCA TWO

6 September



Frozen II 22 November



Star Wars: Episode IX 19 December



FEMALE 16-34 FILMS

A huge variety from horror to action to romance



The Hustle 10 May



Aladdin 22 May



Annabelle Comes Home 28 June



Maleficent: Mistress Of Evil 18 October



Charlie's Angels 15 November

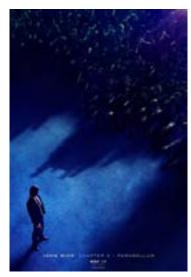


Last Christmas 15 November



MALE 16-34 FILMS

A blockbuster selection of content



John Wick: Chapter Three – Parabellum

17 May



Men in Black International 14 June



Spider-Man: Far From Home 3 July



Fast & Furious: Hobbs & Shaw 2 August



Once Upon a Time in Hollywood

14 August



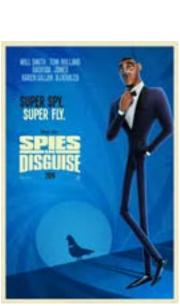
4 October







Blinded By the Light 9 August



Spies In Disguise 9 August



Gemini Man 11 October



The Aeronauts 1 November



Ford Vs Ferrari 15 November



Knives Out 27 November



UPMARKET FILMS

The best way to reach a premium ABC1 audience



Rocketman 22 May



Yesterday 28 June



Downton Abbey 13 September



The Woman in the Window 27 September





CATS

Cats 20 December



2020 FILM SLATE



Death on the Nile



LIVE BRIEF



