



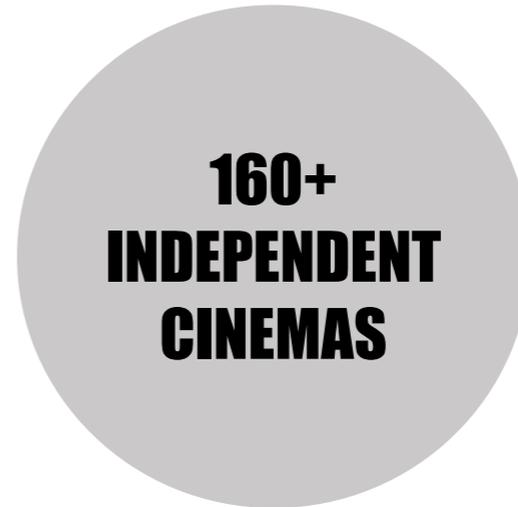
DCM INDEPENDENT CINEMAS

Offering a premium experience for a discerning, affluent audience

DCM'S INDEPENDENT PARTNERS



digital cinema media





Picture
house







**DCM
INDEPENDENTS**

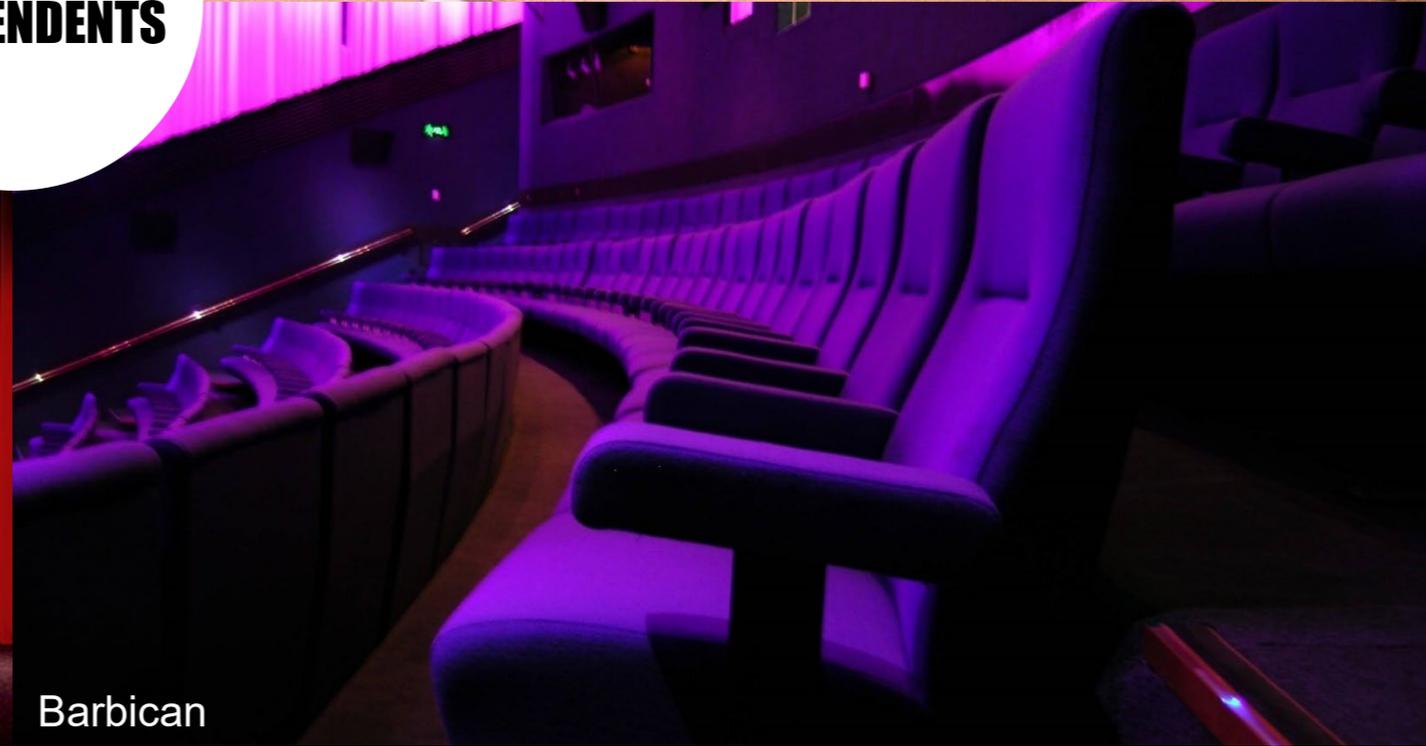




**DCM
INDEPENDENTS**

Electric White City

Archlight, Battersea



Rio Dalston

Barbican

INDEPENDENT CINEMA HAS BEEN THRIVING IN THE UK

Independent cinema has experienced significant growth in the UK over the last decade

Independent cinemas are broadening what they offer and taking a more fundamental role in communities.

Ben Luxford, British Film Institute (BFI)

There is definitely a rise in boutique cinemas – they are tapping into a slightly different audience.

Nigel Parson, Leisure Analyst,
Canaccord Genuity

Indie theatres are the new big thing. It's looking like a new golden age.

Nada Farhoud, The Mirror

Independent cinema has never known a time like it, Indie theatres are reinventing themselves as the new entertainment hubs on the high street – eating into the market share of in-home rivals such as Netflix and Amazon Prime.

Rob Walker, The Guardian

We're comfortable. We're part of the neighbourhood, nice food and drink. And a big plus for us is the depth and range of our programming.

Clare Binns, Picturehouse

THE QUALITY EXPERIENCE IS A KEY DRIVER FOR INDEPENDENT CINEMA

'I like the atmosphere'
Index: 138

Great customer service
Index: 159

Café, bar or restaurant to enjoy as well as the film
Index: 182

'It shows more films that I like than other cinemas'
Index: 119



THE INDEPENDENT AUDIENCE

Independent cinema gives brands the opportunity to engage a discerning, affluent audience.

Demographics

Independents attracts an older affluent audience

	Independent cinemagoer	GB Profile
15-34	26%	30%
35-54	27%	31%
55+	45%	38%
AB	31%	25%
> £50k HH Income	22%	19%

Lifestyle

Heritage and quality are key choice drivers

It's worth paying extra for quality goods

(Index: 109)

I pay attention to where the products I purchase are made/grown

(Index: 121)

I buy Fair Trade products when available

(Index: 123)

Media habits

Enjoy a range of premium media outlets



THE PICTUREHOUSE AUDIENCE

Picturehouse cinema gives brands the opportunity to engage a culture-centric, affluent audience.

Demographics

A highly affluent younger-skewing audience

	Picturehouse cinemagoer	GB Profile
15-34	38%	30%
35-54	31%	31%
55+	30%	38%
ABC1	68%	60%
> £50k	28%	17%

Lifestyle

Perceptive and engaged

I pay attention to where the products I purchase are made/grown

(Index: 159)

I would be prepared to pay more for environmentally friendly products

(Index: 154)

Have visited music concert or theatre in last 12 months

(Index: 268)

Media habits

Seeking interesting & premium content



THE LIGHT AUDIENCE

The Light cinema gives brands the opportunity to engage a younger, consumer heavy, discerning audience.

Demographics

A younger-skewing, North-based audience

	The Light cinemagoer	GB Profile
15-34	54%	30%
35-54	26%	31%
55+	19%	38%
Northwest, & Yorkshire	47%	19%
> £50k	26%	17%

Lifestyle

Discerning and tech-centric

I only buy products from a company with whose ethics I agree
(Index: 124)

I buy new products before most of my friends
(Index: 209)

It is important my household is equipped with the latest technology
(Index: 150)

Media habits

Consumes novel & escapist content

NETFLIX



BBC RADIO



TimeOut

London Evening Standard

**INDEPENDENT CINEMAGOERS
ARE 45% MORE LIKELY TO BE
HEAVY CINEMAGOERS**

ACADEMY AWARD WINNERS DRAW IN THE CROWDS TO INDEPENDENT CINEMAS...

Independents deliver 14% of all DCM admissions, but often a far higher proportion of Oscar winning movies



Everything Everywhere All at Once

30% of DCM admissions



The Whale

28% of DCM admissions



Women Talking

66% of DCM admissions



Killers of the Flower Moon

21% of DCM admissions



Anatomy of a Fall

67% of DCM admissions



Past Lives

60% of DCM admissions

...BUT THEY ALSO ENJOY BLOCKBUSTERS TOO

Independent cinemagoers also seek out quality blockbuster entertainment across the year



Elemental

Index: 241



Oppenheimer

Index: 219



**Indiana Jones And The Dial Of
Destiny**

Index: 215



The Little Mermaid

Index: 200



Barbie

Index: 199



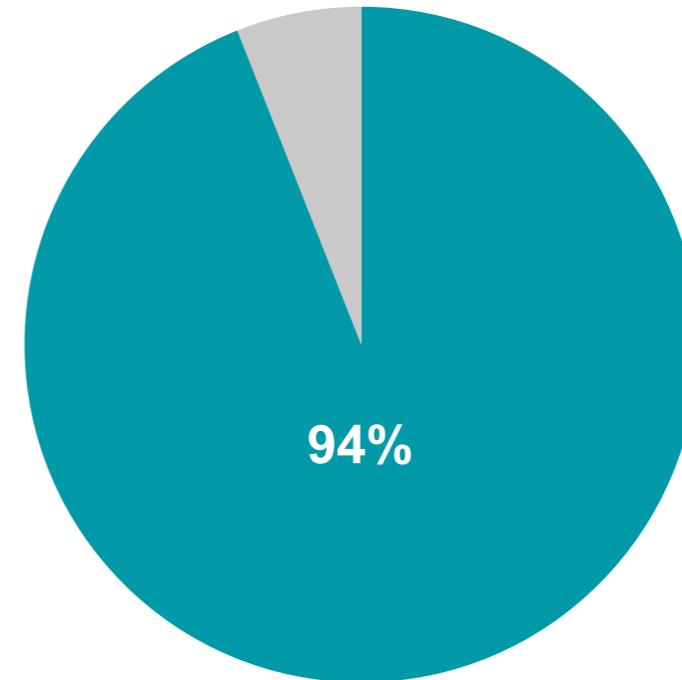
**Mission: Impossible - Dead
Reckoning Part One**

Index: 182

DCM'S INDEPENDENT CINEMAS OFFER BRANDS NATIONAL COVERAGE



Number of independent cinemas on a high street, retail park or in a shopping centre



■ High Street/Shopping Centre/Retail Park
■ Not on a High Street/Shopping Centre

57% of independent cinemagoers
go shopping, or for food and drink after their cinema trip
(Idx: 101)

INDEPENDENT CINEMA CAMPAIGN SUCCESSES

Kia

Movement That Inspires



- Kia was looking for the opportunity to showcase their innovative credentials in a premium environment as part of a new brand identity and product launch of the new EV6 and Niro.
- Kia bought into the annual Independent Gold Spot in addition to partnering with Picturehouse to launch several creatives as part of its 'Movement that Inspires' campaign.
- This long-term campaign saw significant uplifts across its first year with key messaging cutting through more for cinemagoers vs. control – 'leader in electric vehicles' (+24%) and 'innovative brand' (+37%).
- Association of Kia with the key 'movement that inspires' message increased across the campaign, with a 14% uplift in association seen from Wave 1 to Wave 2

Hop House 13

Discover Tuesdays @ Picturehouse



Hop House 13 became the headline partner of Picturehouse's 'Discover Tuesdays' – encouraging consumers to discover Guinness' lager for the first time alongside a new film.

'Hop House 13' owned Discover Tuesdays as part of a year-long partnership incorporating a 30" on-screen advert, in foyer activations, bar stocking, online banners, social media and newsletter branding.

The results proved significant for Hop House 13 - across the 12 month partnership almost 35,000 units were sold across Picturehouse's 23 cinemas.

Volkswagen

Independent cinema sponsorship



Volkswagen supported independent cinema for over a decade; a partnership that has delivered clear long-term benefit by establishing a strong bond between the brand and a business critical audience.

When the sponsorship began, 29% of those exposed said that they would consider a Volkswagen in the future - within three years this had more than doubled, reaching 64% (Source: CAA 2007).

Those exposed to the campaign are twice as likely to consider Volkswagen as their number one choice than those who aren't (Source: Hall & Partners 2014).

As well as shifting brand perceptions and consideration metrics the sponsorship has also helped sell more cars. VW's market share has grown by 22% in the 10 years from 2004 (7.1% to 8.7% in 2014).



THANK YOU