

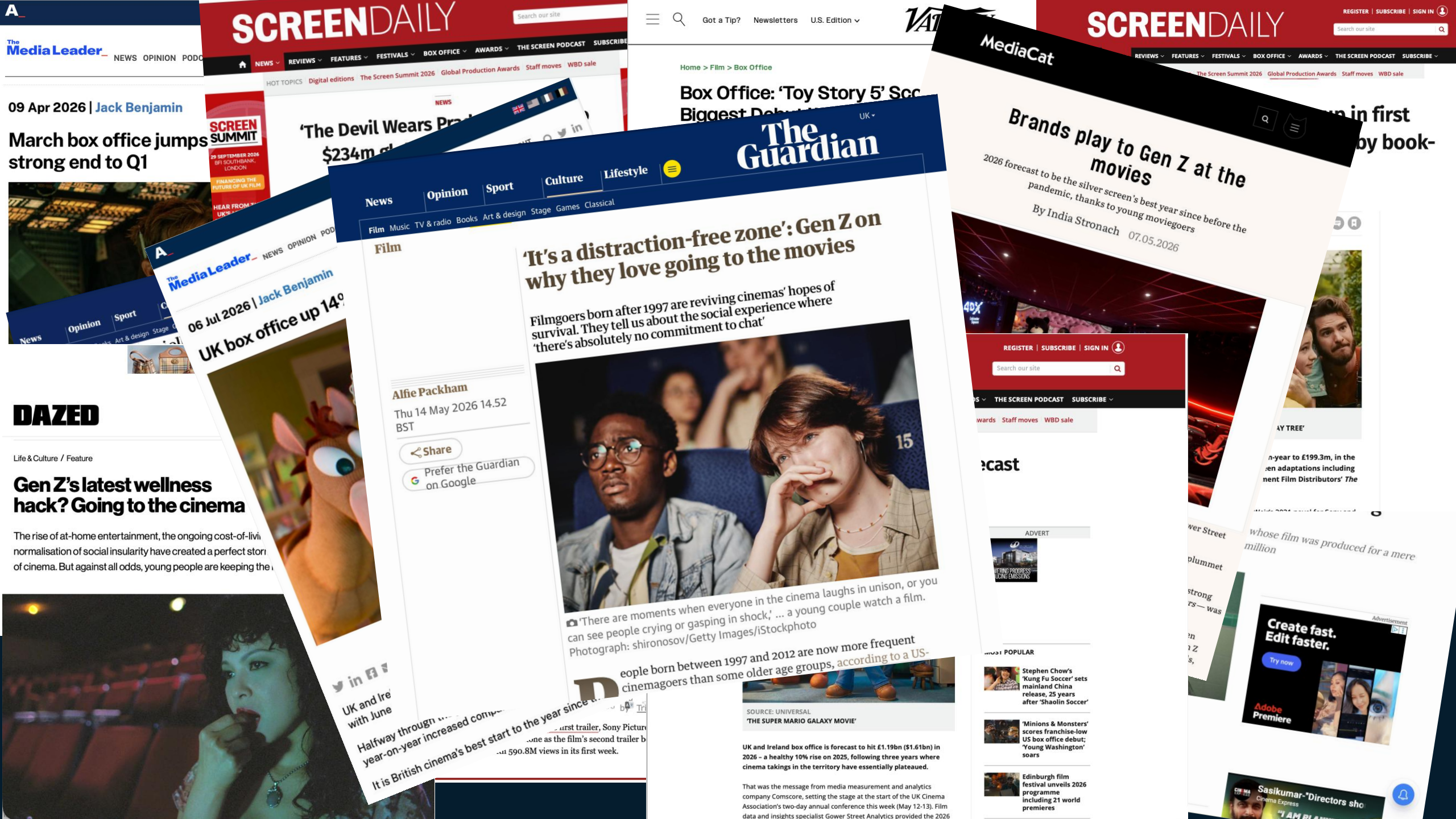
Welcome to DCM Upfronts 2026



Welcome

Karen Stacey
CEO, DCM





09 Apr 2026 | Jack Benjamin

March box office jumps strong end to Q1



'The Devil Wears Prada' \$234m

Box Office: 'Toy Story 5' See Biggest Debut

The Guardian

News

Opinion

Sport

Culture

Lifestyle

Film Music TV & radio Books Art & design Stage Games Classical

Film

'It's a distraction-free zone': Gen Z on why they love going to the movies

Filmgoers born after 1997 are reviving cinemas' hopes of survival. They tell us about the social experience where 'there's absolutely no commitment to chat'



There are moments when everyone in the cinema laughs in unison, or you can see people crying or gasping in shock,' ... a young couple watch a film. Photograph: shironosov/Getty Images/iStockphoto

People born between 1997 and 2012 are now more frequent cinemagoers than some older age groups, according to a US-

SOURCE: UNIVERSAL 'THE SUPER MARIO GALAXY MOVIE'

UK and Ireland box office is forecast to hit £1.19bn (\$1.61bn) in 2026 – a healthy 10% rise on 2025, following three years where cinema takings in the territory have essentially plateaued.

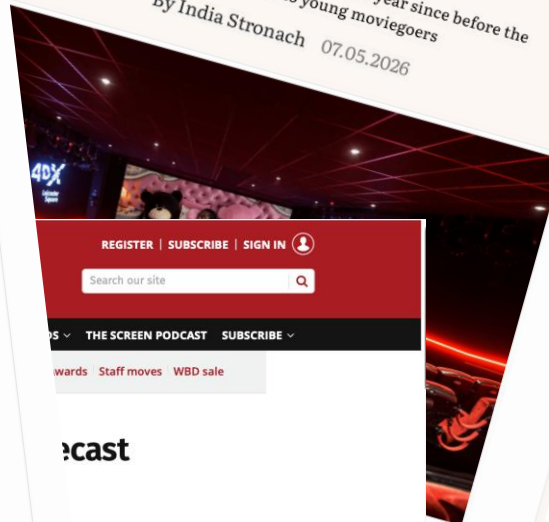
That was the message from media measurement and analytics company Comscore, setting the stage at the start of the UK Cinema Association's two-day annual conference this week (May 12-13). Film data and insights specialist Gower Street Analytics provided the 2026

MediaCat

Brands play to Gen Z at the movies

2026 forecast to be the silver screen's best year since before the pandemic, thanks to young moviegoers

By India Stronach 07.05.2026



REGISTER | SUBSCRIBE | SIGN IN

Search our site

THE SCREEN PODCAST SUBSCRIBE

wards Staff moves WBD sale

cast

ADVERT



WHAT'S POPULAR

Stephen Chow's 'Kung Fu Soccer' sets mainland China release, 25 years after 'Shaolin Soccer'

'Minions & Monsters' scores franchise-low US box office debut; 'Young Washington' soars

Edinburgh film festival unveils 2026 programme including 21 world premieres

in first by book-



AY TREE'

n-year to £199.3m, in the en adaptations including ment Film Distributors' The

whose film was produced for a mere million

Create fast. Edit faster.

Try now

Adobe Premiere

Sasikumar "Directors sho



Admissions
+9%
YTD



Delivered across a quality estate of cinemas



 **cineworld**
C I N E M A S

ODEON

vUE

125 +

*Picture
house*

the^{oo}light

OMNIPLEX
C I N E M A S

**INDEPENDENT
EXHIBITORS**

= 85% of all cinema admissions

Cinema: The Best Seat In Media



Today's themes

What you'll hear about this morning

**Culture that
resonates**

**The role of
cinema**

The film slate

01. Building Box Office Brands: Cultural Relevance

Michael Tull
Head of Strategy &
Insight, DCM

Caroline Wren
CEO, MTM



**Be in culture. Cultural moments.
Cultural visibility. Culturally
relevant.**



Brands with
**high cultural
relevance**
grow nearly
6X more
than brands
with low levels



What resonates and delivers relevance?



Behind the Scenes: Methodology

Experts

10 interviews with senior media planners,
film academics, and cultural strategists

Audience

30-min AI-moderated interviews with 75 cinemagoers
1500 adults (UK nat-rep, 16-64) completed 15min survey

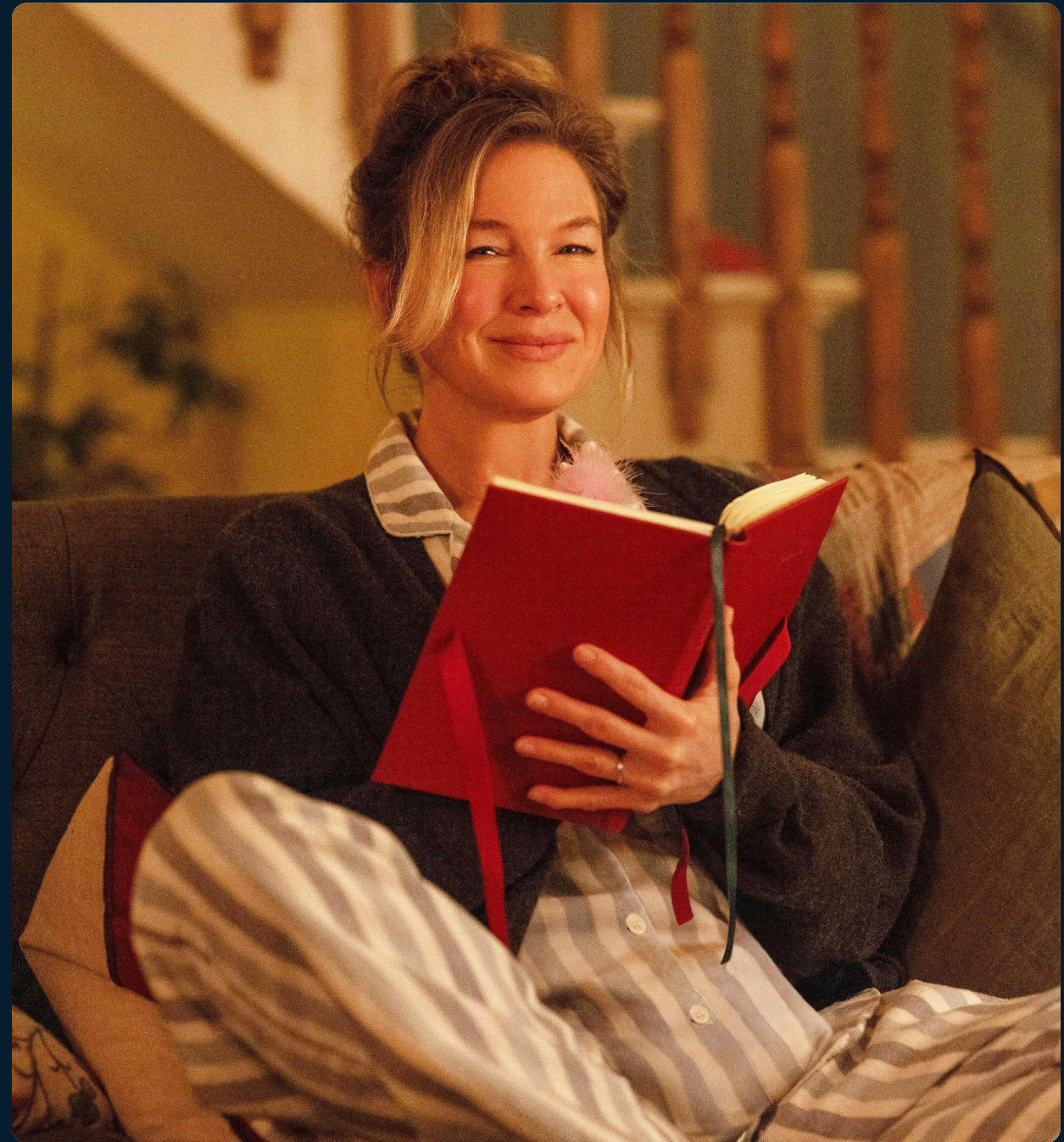
Defining 'Cultural Moments'

Cultural moments are collective moments that shape societal conversation.

Shared: A defined event or piece of content that a lot of people engage with together (in-person or online)

Discursive: Causes audiences to engage with others' experiences of the moment and it transcends through the created discourse

Time-bound: Has a defined peak where audiences engage with the content or event concurrently



They can vary in scale, predictability and endurance

These characteristics are not mutually exclusive. For example, cultural moments can be mass, spontaneous and fleeting; or niche, planned and long-lasting



Niche

Mass

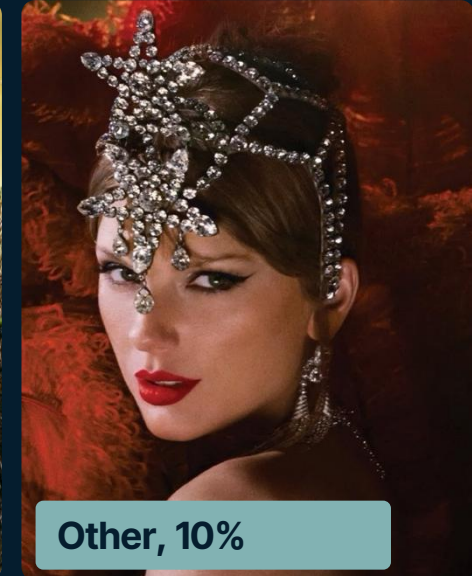
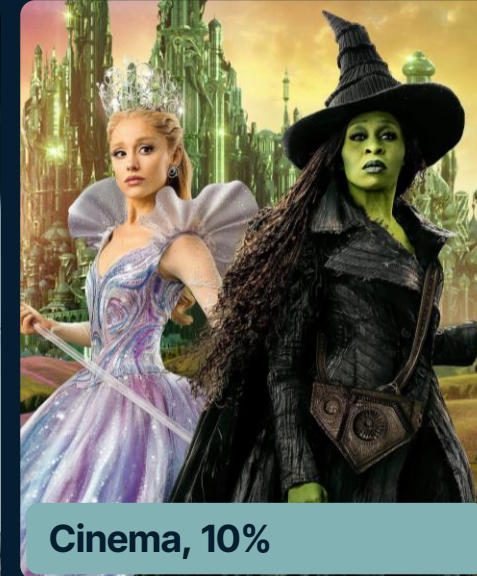
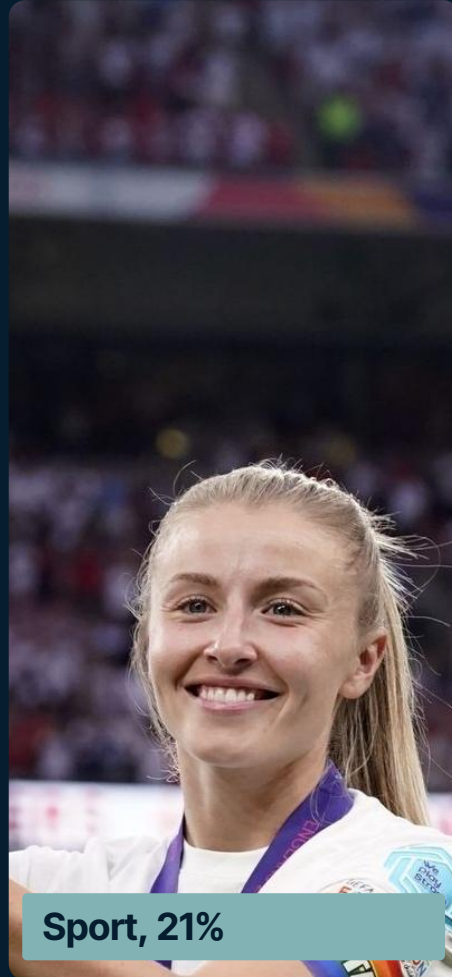
Spontaneous

Planned

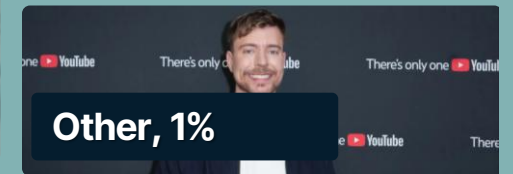
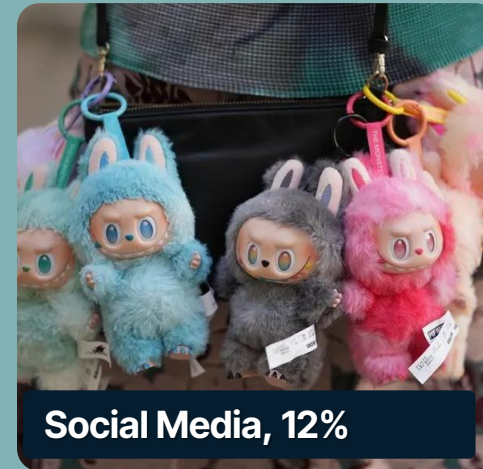
Fleeting

Long-lasting

Audiences engage with a wide range of culture



TV and Cinema deliver 85% of commercially available entertainment that resonates



Cinema delivers disproportionate cultural impact

Cinema outperforms its small share of 'video time' delivering significant, long-lasting cultural impact

28%

**recalled cultural
moments**

vs

1%

**total video
viewing time**

Cinema remains a culturally relevant force



Channels deliver culture in different ways

Cinema and the SVOD players are differentiated by their ability to deliver high talkability
"must see" moments

Social media platforms & creators are known for creating trendy, hyper-personalised, relatable moments.

Champions alternative views

Provides culture that reflects my own life and identity

Gives a platform to everyday voices



Defines what is popular and mainstream right now



Is the heart of our culture



Creates culture that stands the test of time

Traditional broadcasters are seen to create quintessential, timeless moments that feel distinctly British.

Is the place to discover what's coming next



Sparks moments I want to talk about with others

Creates "must-see" moments everyone talks about



SVOD & Cinema create buzzworthy moments that define the wider cultural zeitgeist.

The trajectory of a cultural moment

Cultural moments aren't just about the moment and the resonance

Salient moment

The point at which audiences collectively engage with the event

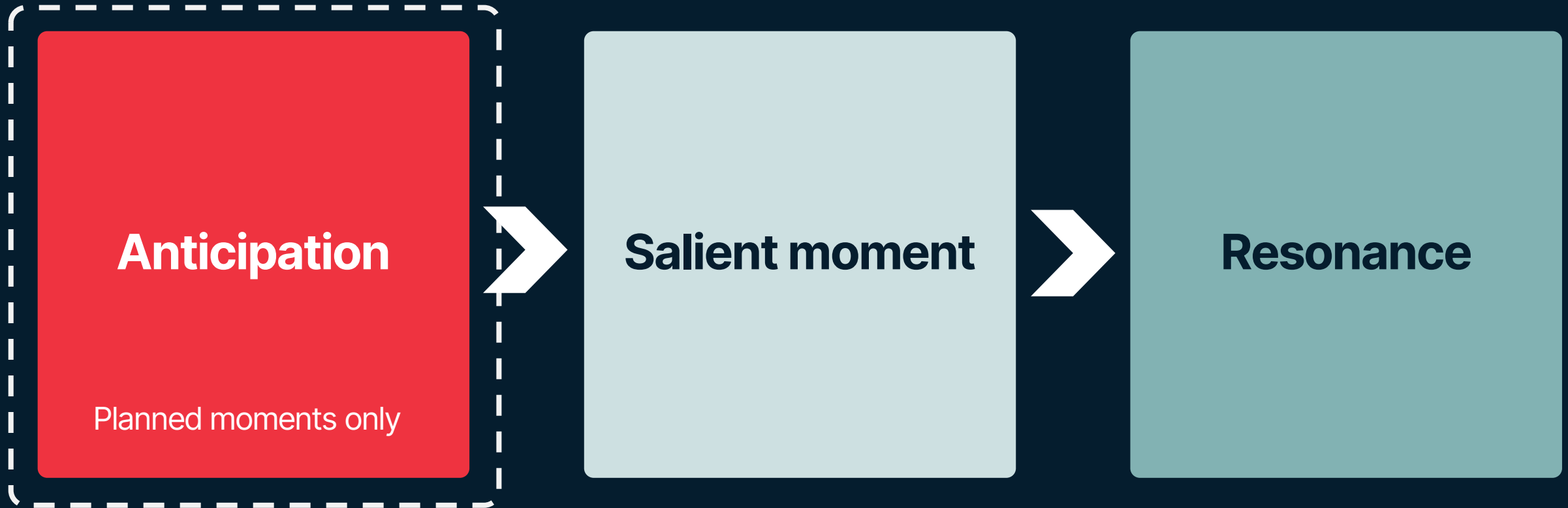


Resonance

The ripple effect of discourse, wider event coverage, and the enduring memories

The trajectory of a cultural moment

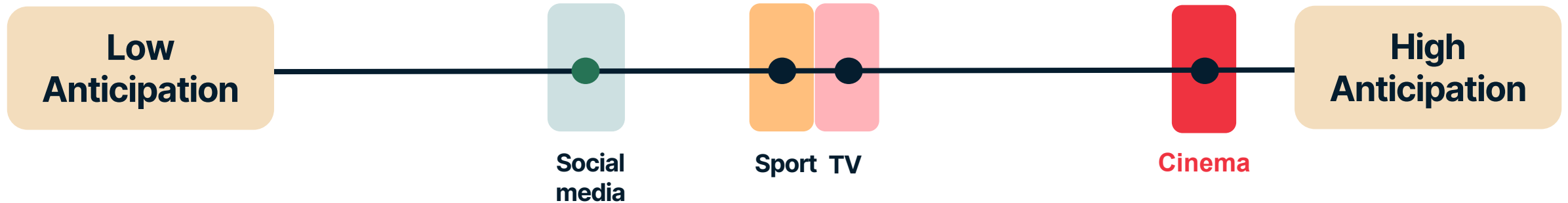
Cultural moments aren't just about the moment and the resonance – planned moments deliver a key 'build up' stage



Cinema is unparalleled for being highly anticipated

Cinema has an inherent 'event' status and a whole ecosystem that drives anticipation for months that separates it from other video channels/programming.

Cultural Moments Associations – Gap between left [0-3] & right side [8-10] (All respondents)





2.5M

weekly cinema admissions

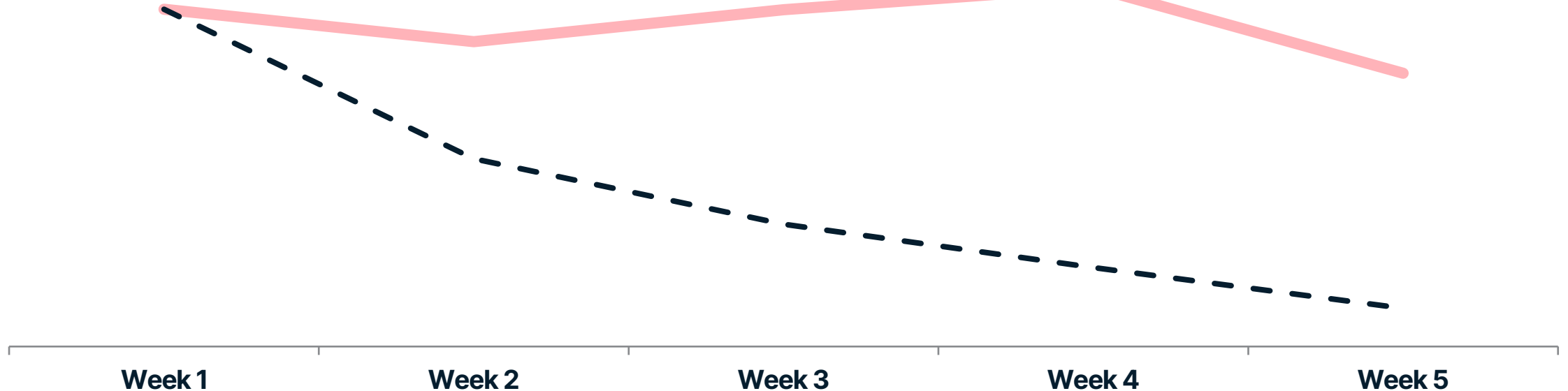
Every ticket sold is a 'high anticipation' moment that is a high value opportunity for brands to harness

Cinema isn't just about IP and franchises

When a new film strikes the zeitgeist, cinema is the only place they can see it – as seen with Obsession's remarkable box office performance

Admissions by week

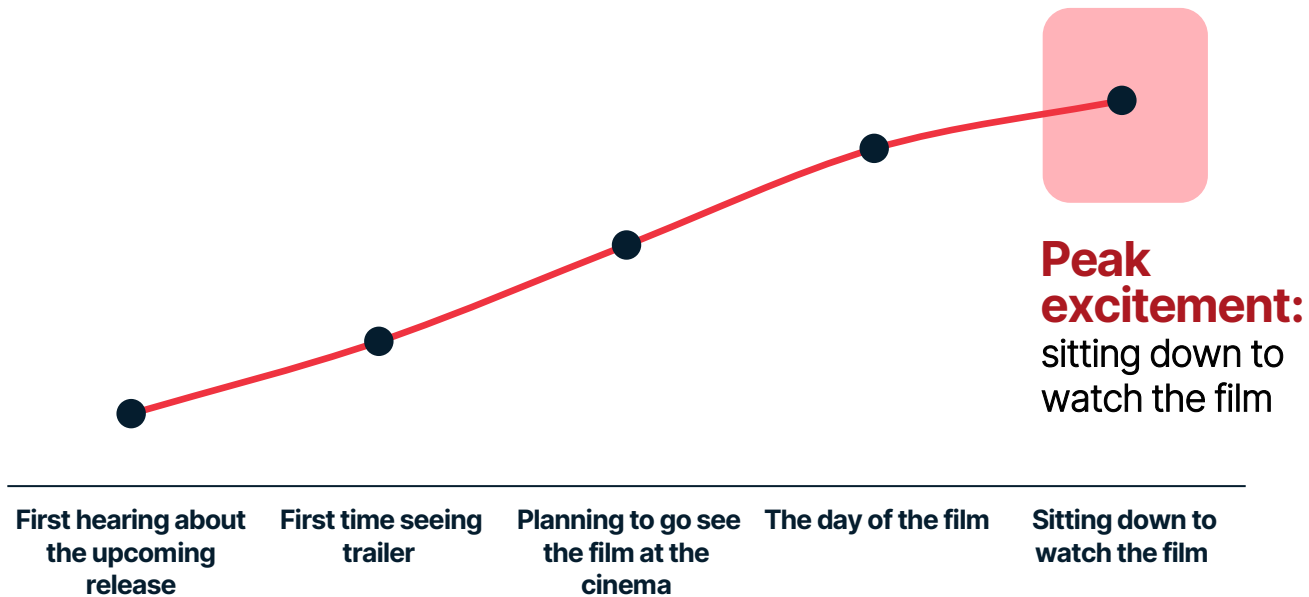
OBSSESSION



With cinema, brands always enter the scene just as excitement is peaking

Excitement Curve:

Feel excited (6-10) at each moment



Cinema's build up creates an emotional high no other channel can match

"The lights go down, the screen's
really big, everyone's quiet in
anticipation, and no one checks
their phones. It just feels more
exciting"

Female cinemagoer, London

Emotions before watching something new at the cinema

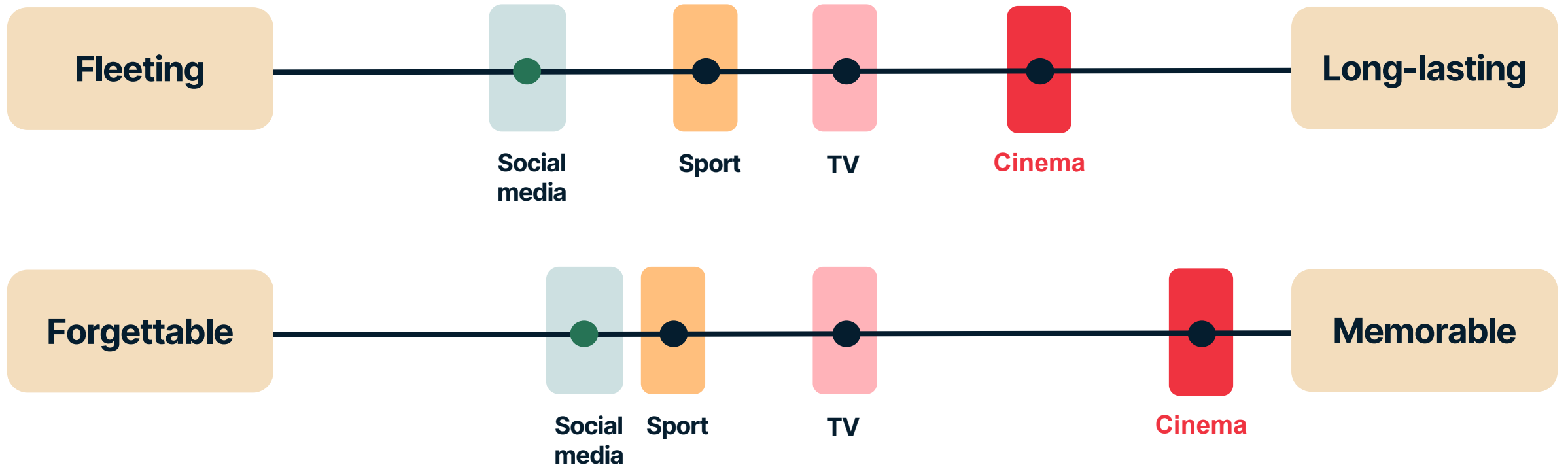


*Cinema significantly higher than all other channels

Emotional resonance is cinema's strength

Cinema cultural moments are felt to be the longest lasting, while by comparison social media moments are more fleeting and forgettable

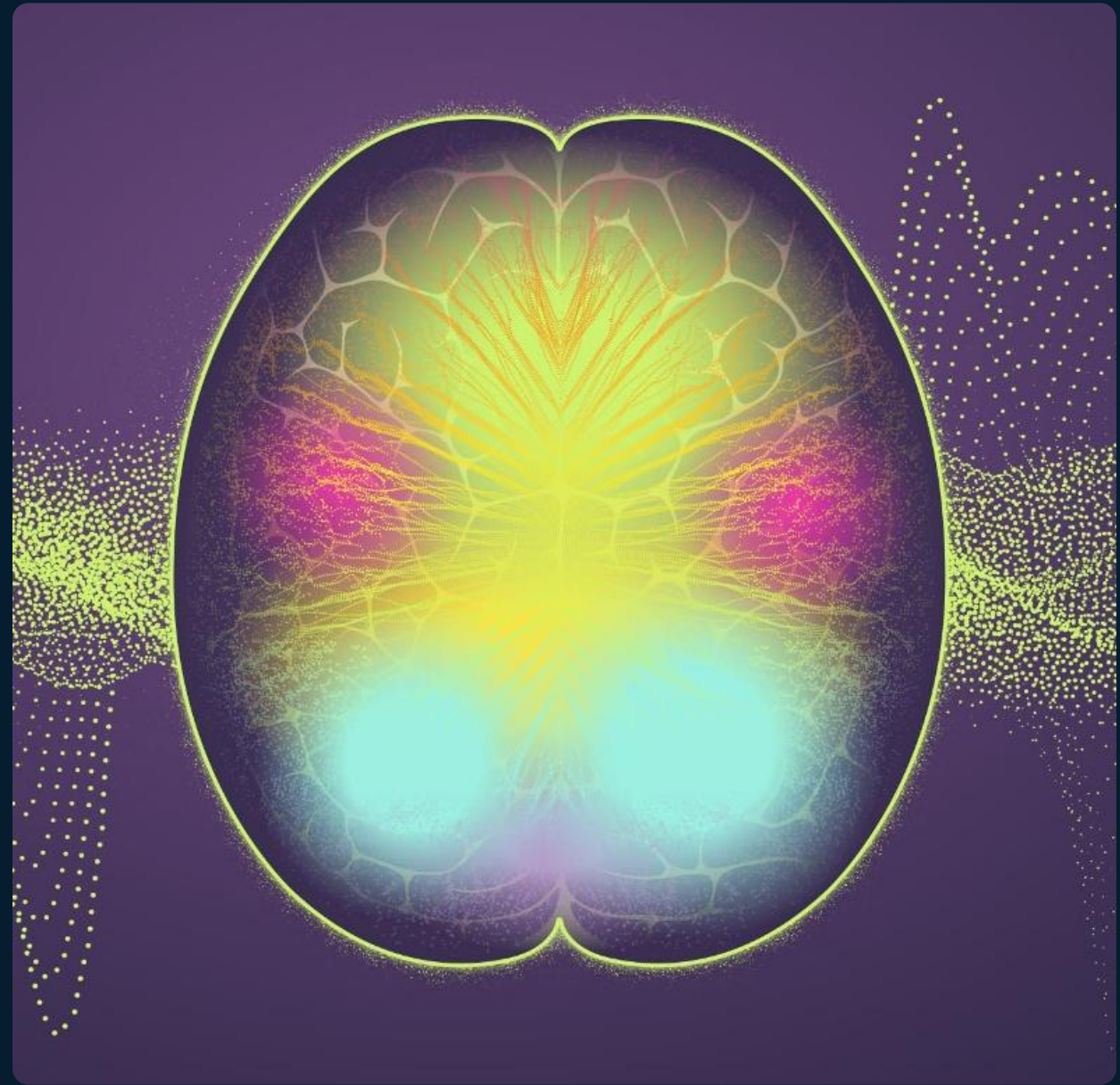
Cultural Moments Associations – Gap between left [0-3] & right side [8-10] (All respondents)



Brands can ride the wave of emotional intensity to long-term memory

Cinema's unparalleled emotional resonance drives stronger memory encoding. The brain also builds associations between these positive emotions and the advertiser brands.

"I think if you are seeing [ads] before something you're very excited about, it is naturally going to create a positive association." Female cinemagoer, London



The nature of cinema makes audiences more open to advertising

The high anticipation moment, the focused setting, the well-established ad experience positioned before the main event (as opposed to during) help make audiences more positive to ads in cinema.

63%

of cinemagoers agree that 'advertising is an expected part of the build up to cultural moments'

#1

Cinema scores highest vs
TV, Streaming, Social & Online Video

Ads do not interrupt my experience

Openness to ads shown

Memorable ads

Cinema stands out from other channels for its ability to deliver a 'big brand energy' halo

% agree 'more likely to associate attribute with brand' when they've advertised before a cinema cultural moment

High quality

67%

Relevant to me

65%

Established

63%

Category leading

61%

Cinema vs.
all channel average



+16%



+13%



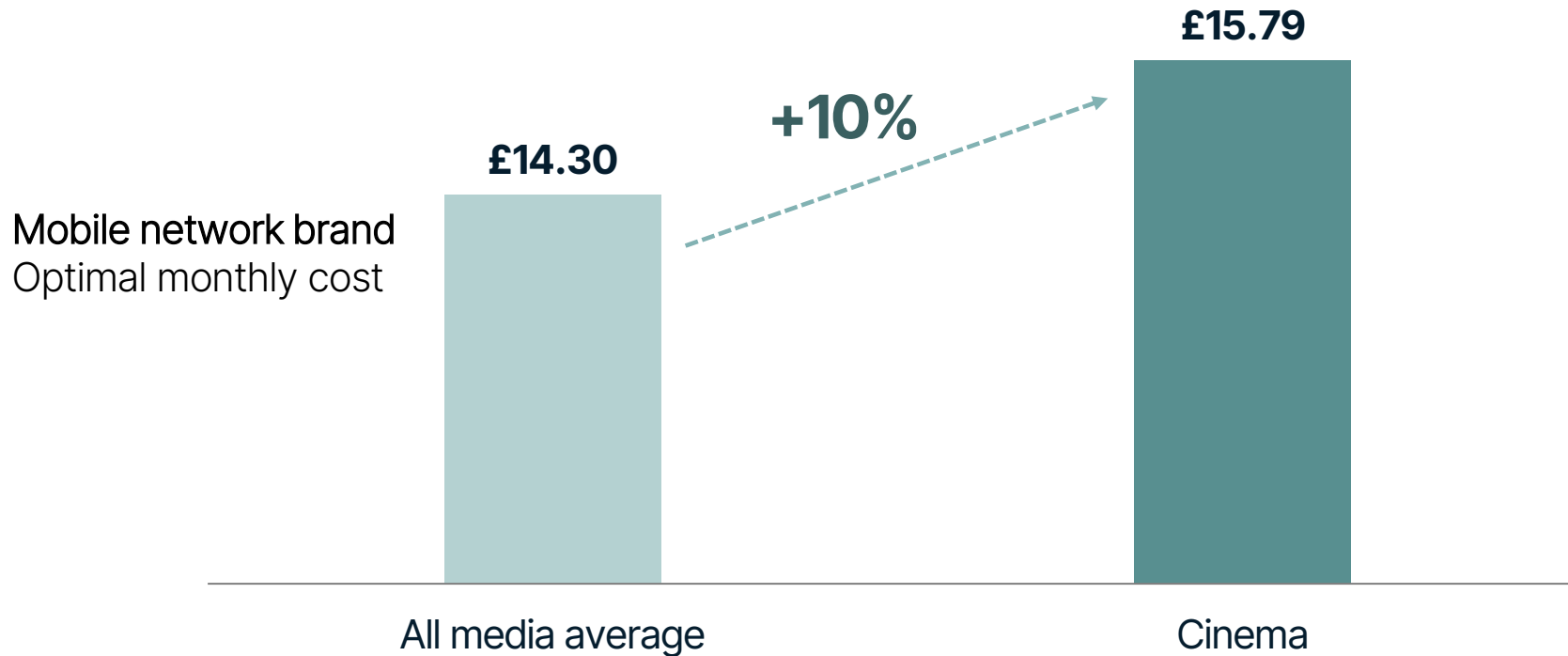
+15%



+14%

Cinema enhances quality perceptions and perceived brand value

Results from our research last year showed that when people believe a brand is launching with advertising in cinema, price perceptions for the brand significantly increase.



Maximising cultural relevance with cinema





Running in the premium
positions of cinema's
biggest blockbusters
maximises cultural
relevance

+55%

Summary

**Cinema remains a
powerful cultural
force**

**Anticipation +
Context deliver
a high value
advertising
opportunity**

**Cinema maximises
cultural relevance
for brands**

02. Cinema's Hidden Value:

Why measurement holds the key to smart investment

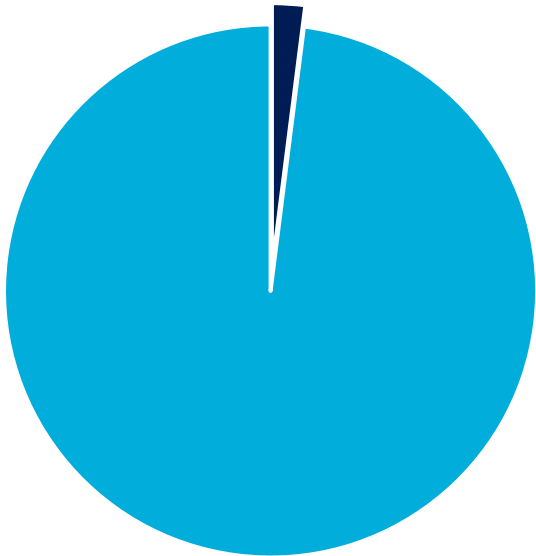
Bryony Lawler
Senior Director, UK&I, Ebiquity



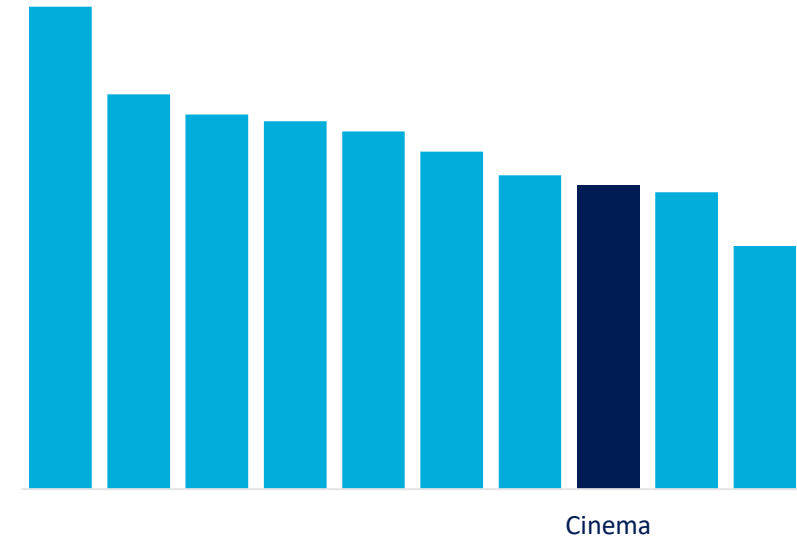
Cost efficiency and effectiveness are not the same thing. Confusing them can be costly.

Cinema represents a small proportion of media spend and also sits at the lower end of ROI benchmarks

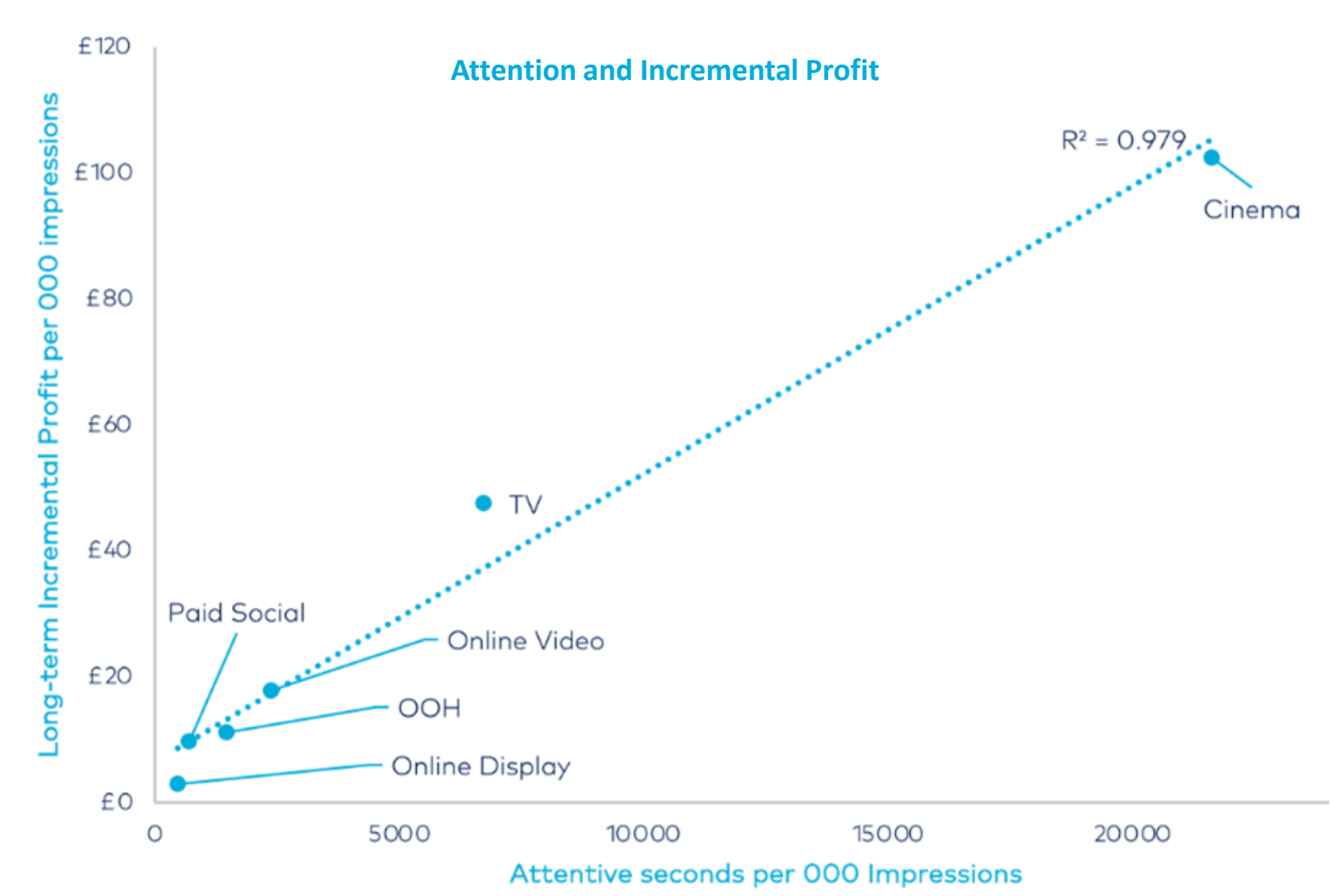
Ebiquity client data highlights the reality that **Cinema** only accounts for about **2%** of advertiser's yearly budgets.



Cinema sits at the lower end of the Ebiquity ROI benchmark hierarchy.



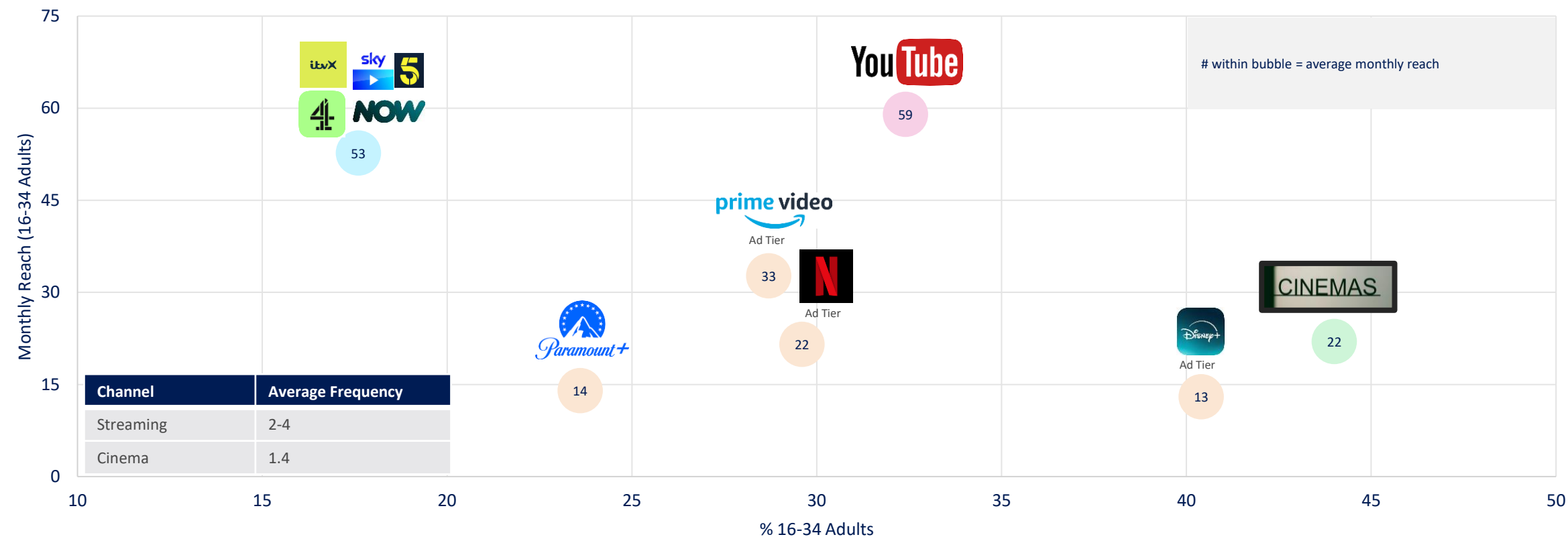
However, Cinema has one of the highest long-term multipliers and delivers the strongest attentive seconds per 000 impressions





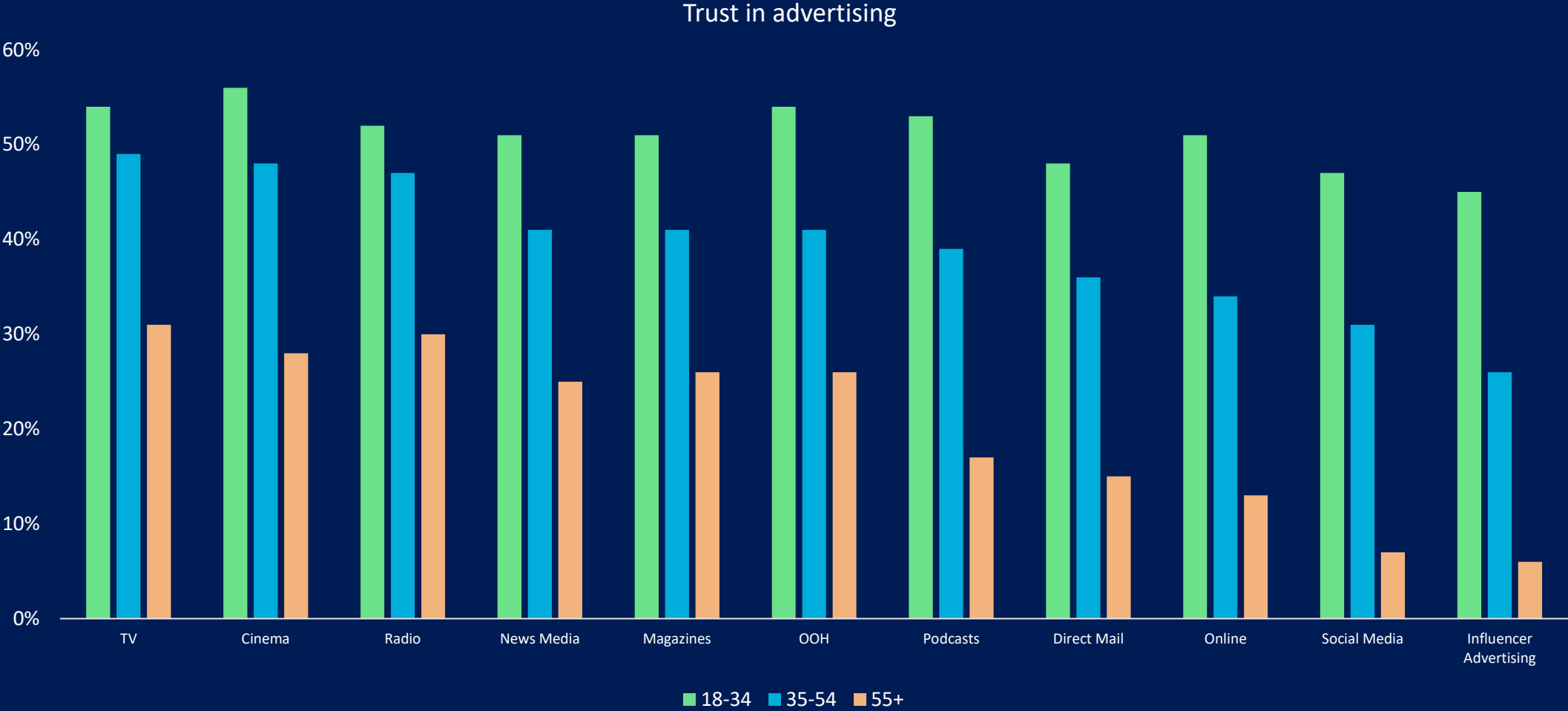
Cinema isn't just about ROI, it's about **FAME**
in a **QUALITY, BRAND-SAFE** environment

Cinema delivers fame, reach and an elusive younger audience profile



Source: DCM, BARB, TechEdge As Broadcast January-June 2026

Supporting responsible advertising in high quality environments pays dividends



Source: Credos 2024

Premium placements deliver stronger returns across every channel.



1.4x

greater returns than daytime TV



5x

more attention than online digital



3x

Higher conversion than programmatic

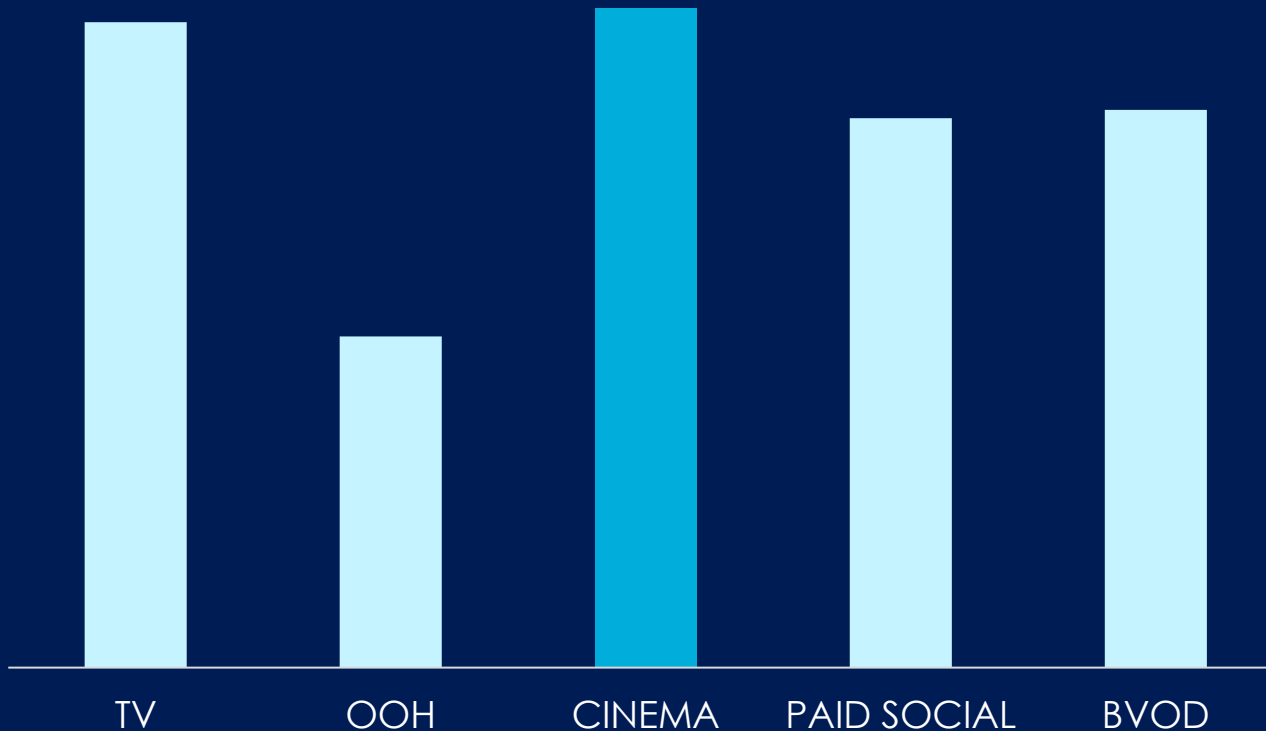
‘You get what you pay for’ rings true

Source: Ebiquity (1) Ocean Outdoor – The Attention Dividend/ IAB

**Cinema's value is hidden because
the data isn't telling the full story.
YET...**

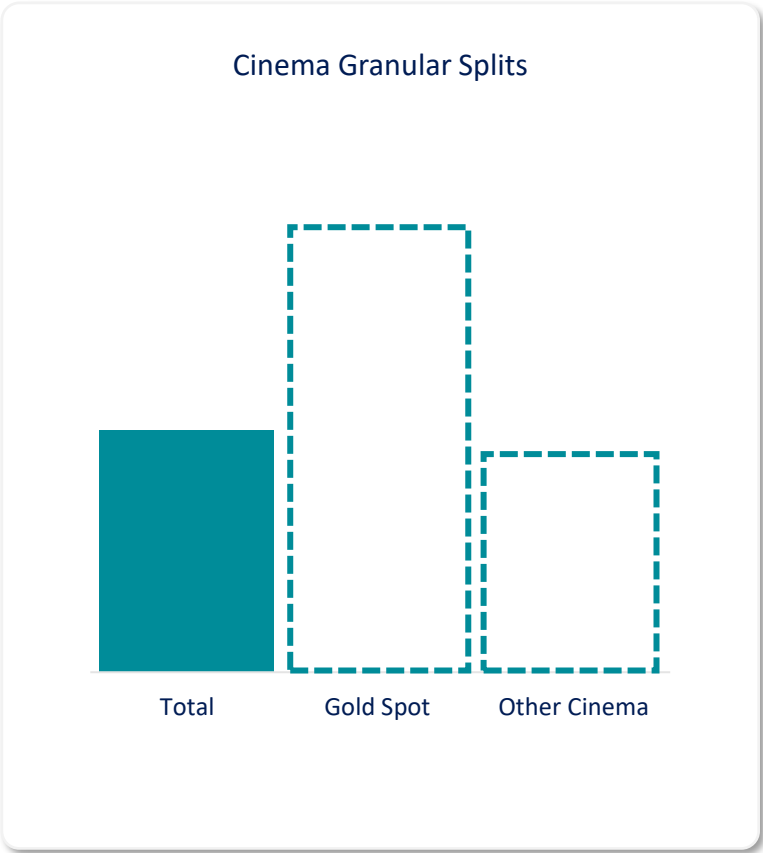
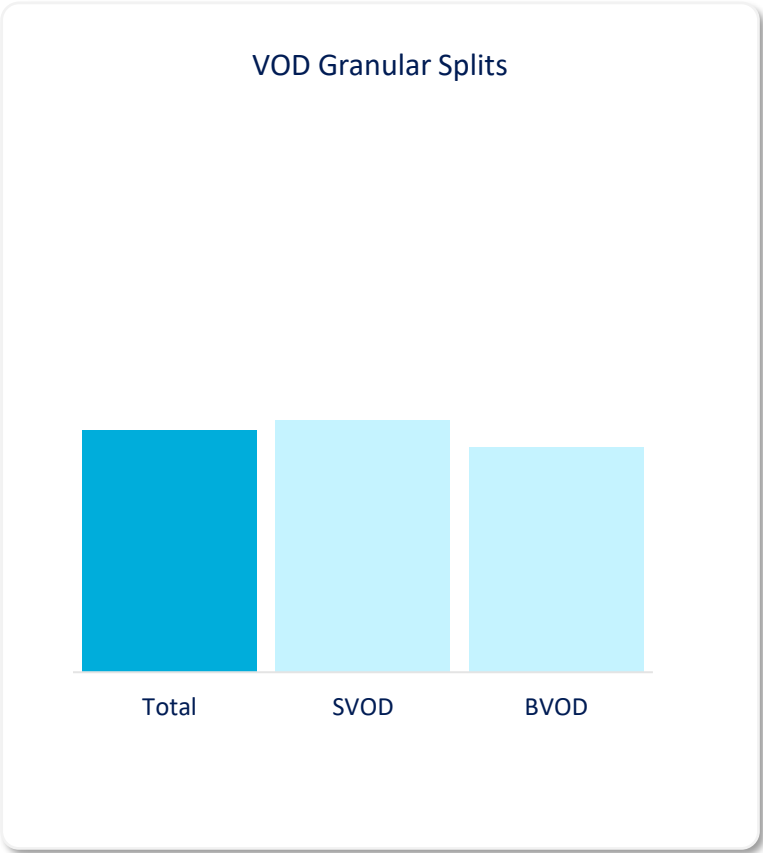
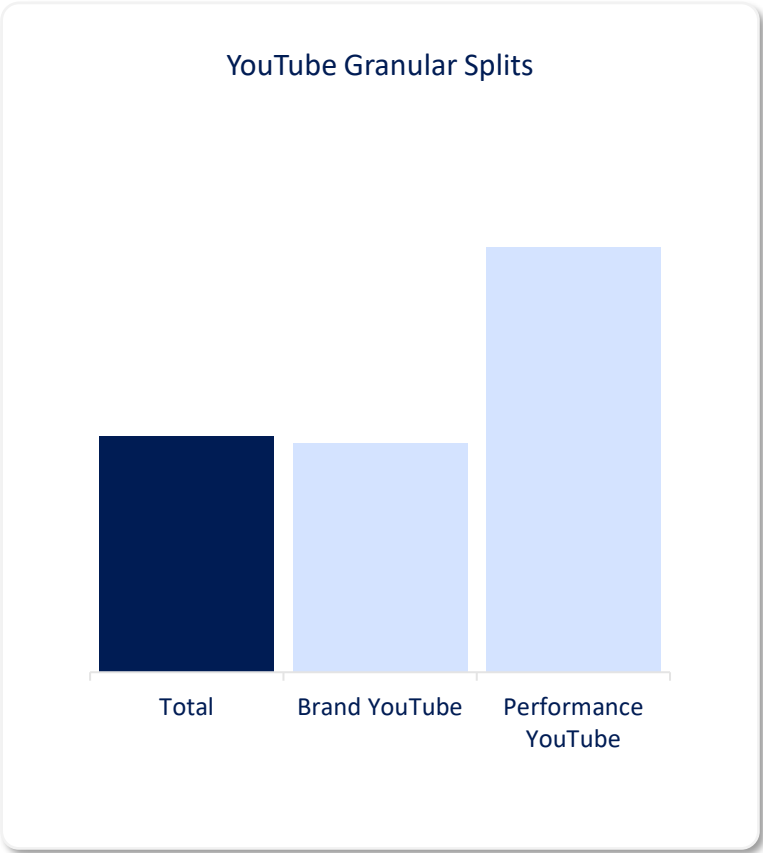
The characteristics of high performing Cinema

Client Illustration: Media Channel ROI



- Powerful brand-building channel with a premium, high-attention environment
- Strong creative amplifies returns, rewarding story-led executions
- Context is critical, driven by audience mindset and message/product relevance
- Can provide efficient incremental value, even at low spend levels
- Strongest within a broad media mix with integrated creative execution

Granular buy type splits are likely to reveal a materially stronger case for investment



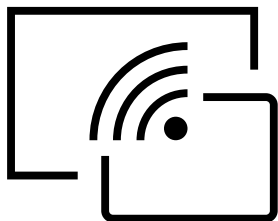
A case study demonstrating why sub-channel splits are essential to accurate media evaluation – Gold spot and other cinema example is for illustration only

Cinema sets the bar for media data, with fully accountable and independently verified admissions available at a spot level

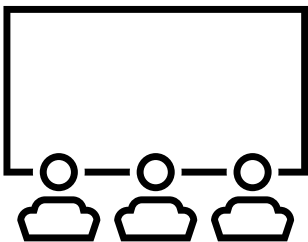
Date	TV Region	Buying Route	Film	Delivered Admissions	Location	Postcode
27/06/2026	YORKSHIRE	Film Pack	Toy Story 5	145	Parkway Beverley	HU17 0PW
27/06/2026	SCOTLAND	Film Pack	Toy Story 5	296	Vue Glasgow Fort	G34 9DL
27/06/2026	MERIDIAN	Film Pack	Toy Story 5	139	Vue Thanet	CT10 2BF
27/06/2026	GRANADA	Film Pack	Toy Story 5	45	The Light Stockport	SK1 1SA
27/06/2026	LONDON	AGP	Obsession	128	Vue West End	WC2H 7AL
27/06/2026	LONDON	AGP	Carry On Jatta 4	142	Cineworld Hounslow	TW3 1EY
27/06/2026	CENTRAL	AGP	Supergirl	78	Odeon Dudley	DY5 1SY
27/06/2026	LONDON	AGP	Michael	76	Vue Stratford	E20 1EJ

Source: DCM

Richness of cinema data can help answer the ‘Why’ behind the ROI



When and where exactly did my ads playout?



Supplier Mix
Ad Length
Day of Week
Time of Day
Content
Location



Source: DCM

Measurement holds the key to smarter investment

Cinema Measurement: a best practice framework

ebiquity



Digital
Cinema
Media

Cinema's Hidden Value: Why Measurement Holds the Key to Smarter Investment

03.

In Conversation



Lucy Verby
Founder,
We Are Masterplan



Michael Bensley
Head of Client, DCM



Fleur Andrews
Head of Campaigns,
Google Pixel UK



Gareth George
Director of Media
(Group), RVU



Vanisha Vaghela
Head of Media
Planning, Vodafone

04. Cultural moments and creative impact

Tom Linay
Head of Film, DCM

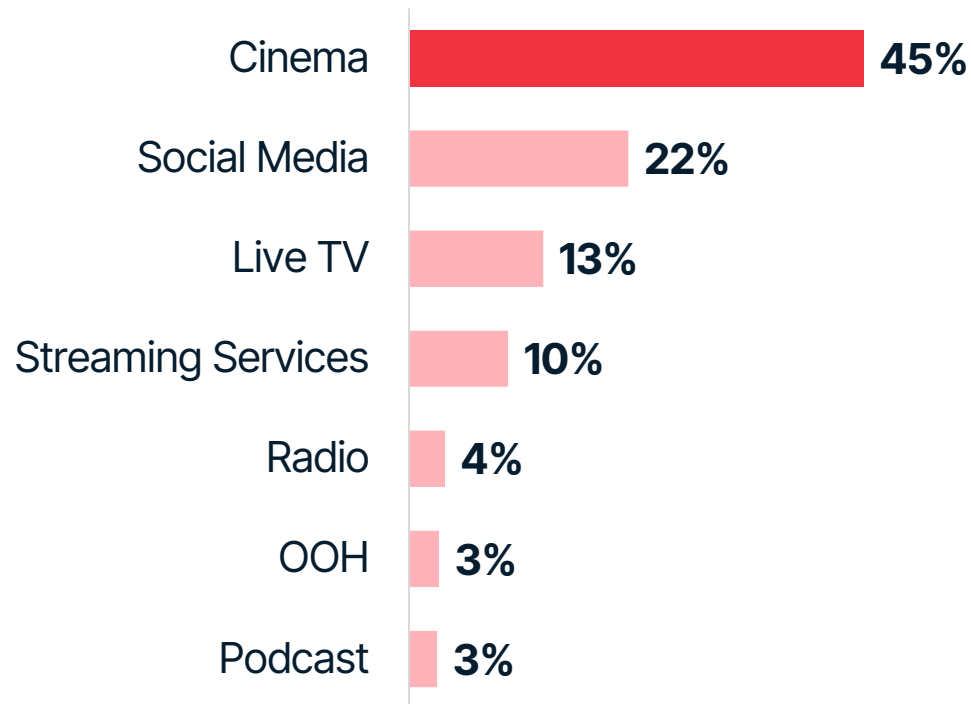
Jeremy Kolesar
Head of Creative, DCM



Cinema = the home of the most creative ads

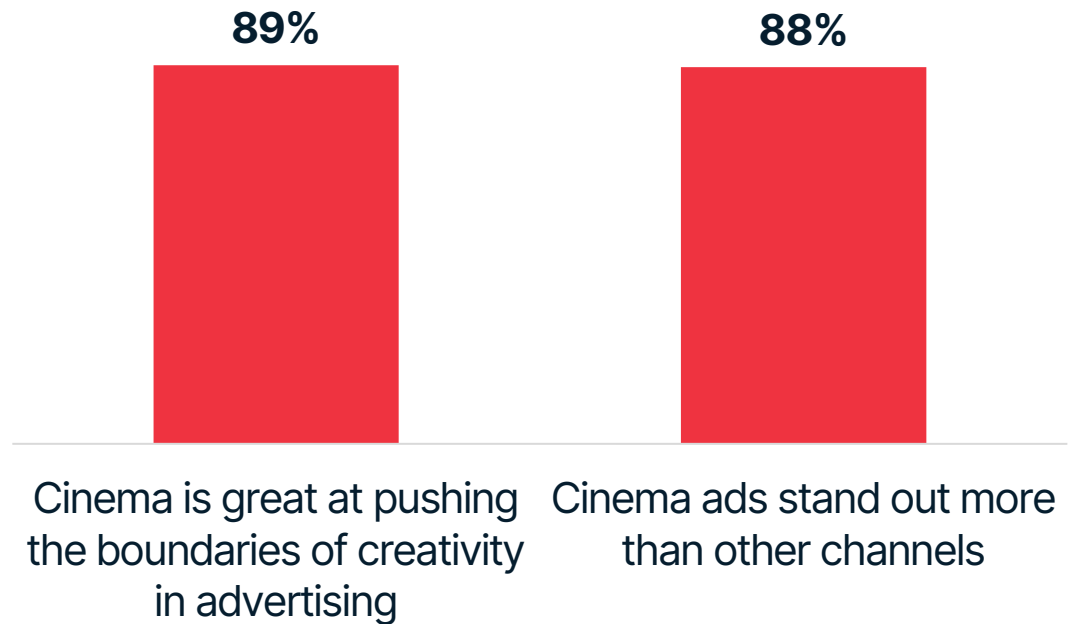
Advertising Creativity

% ranked in 1st place

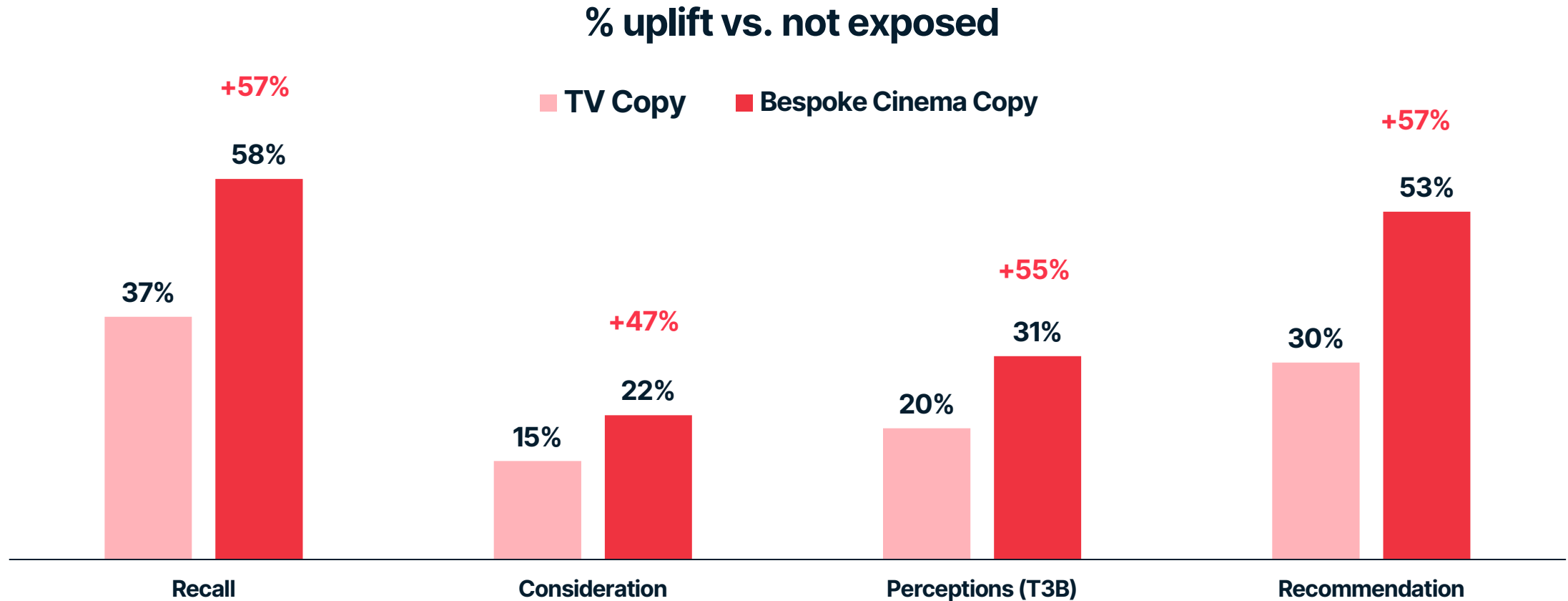


Perceptions of Cinema Advertising

% agree

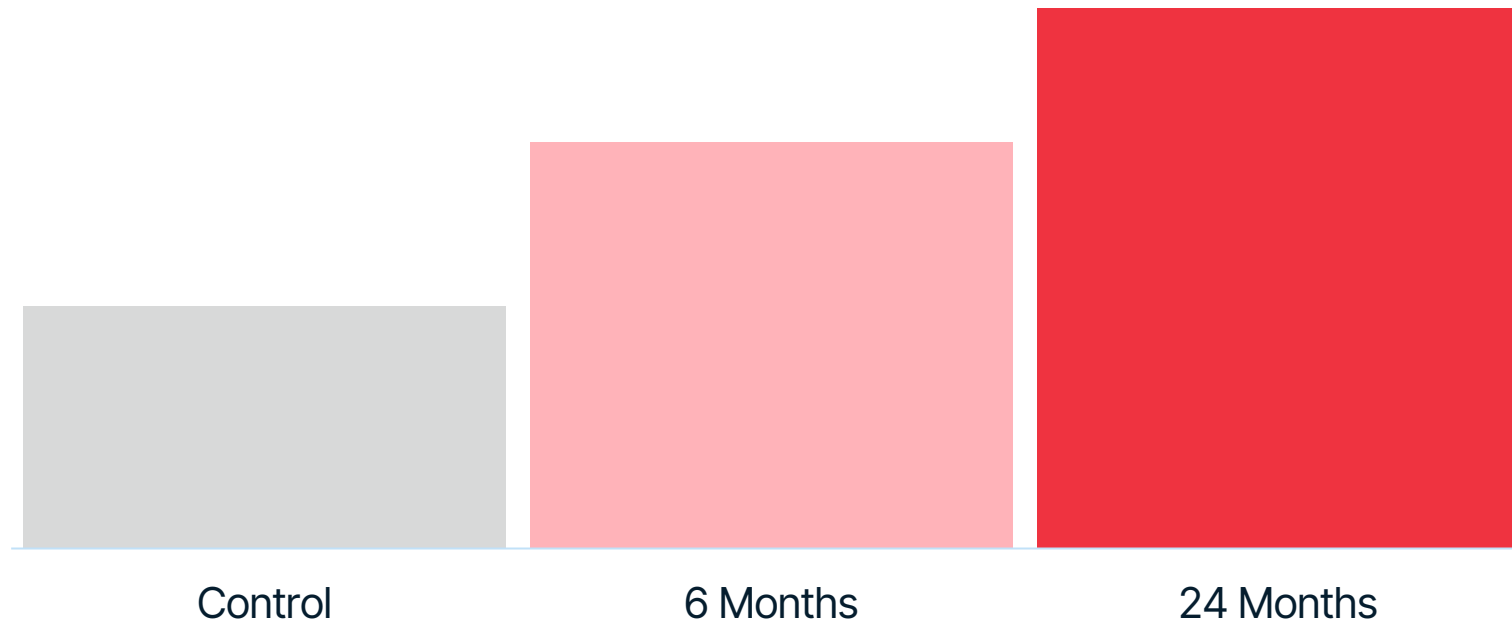


Maximise cut through and impact with bespoke cinema copy

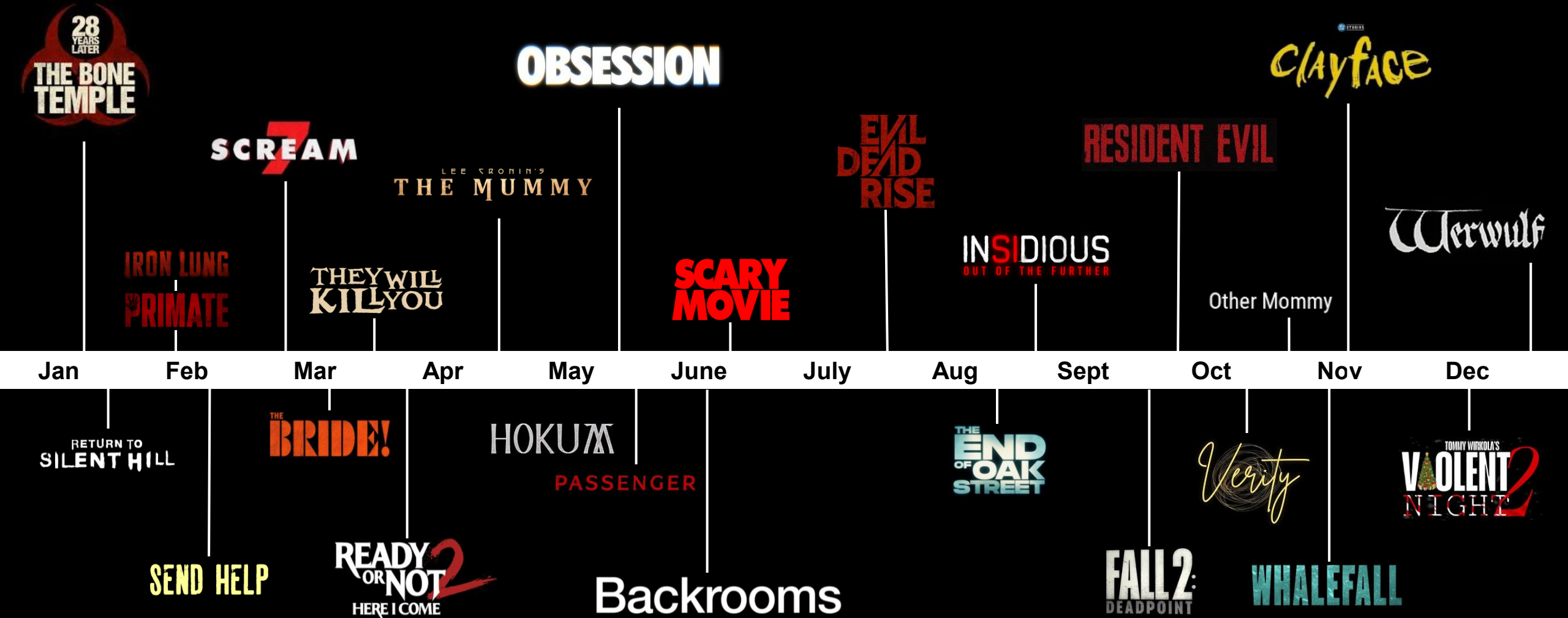


Long term relationship with cinema audiences to build brand consideration

Kia's sponsorship of independent cinema has driven incremental consideration uplift in wave after wave of research:



2026 – a legendary year for Horror



Dead Good Films

8 16-34 TVRs



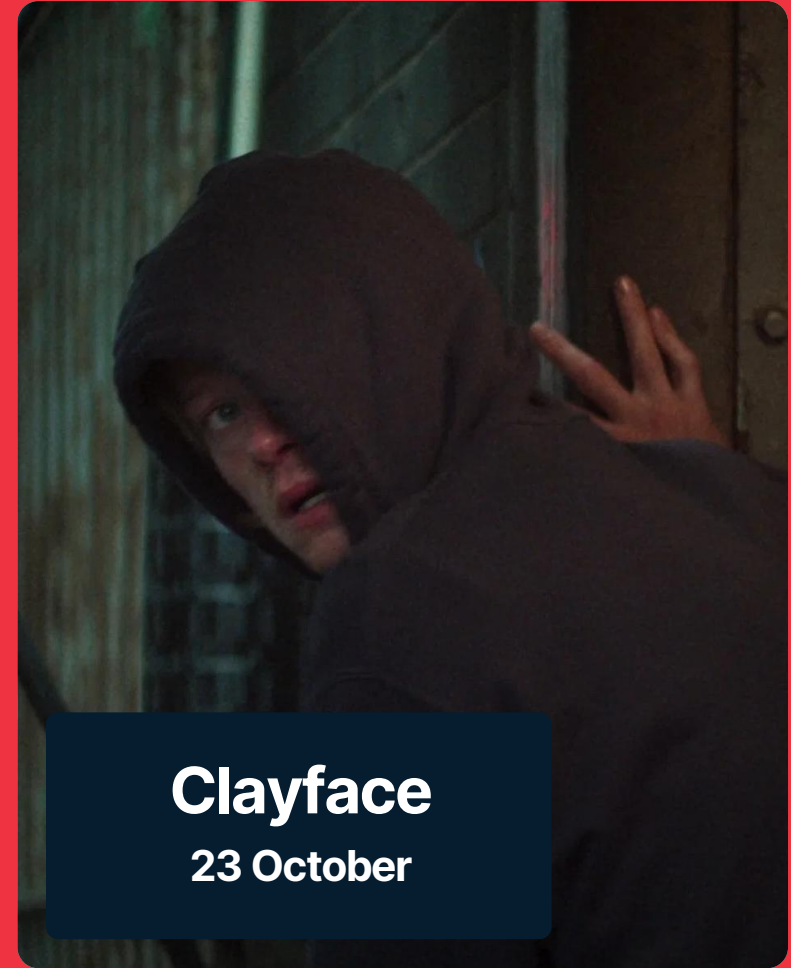
Resident Evil

18 September



Whalefall

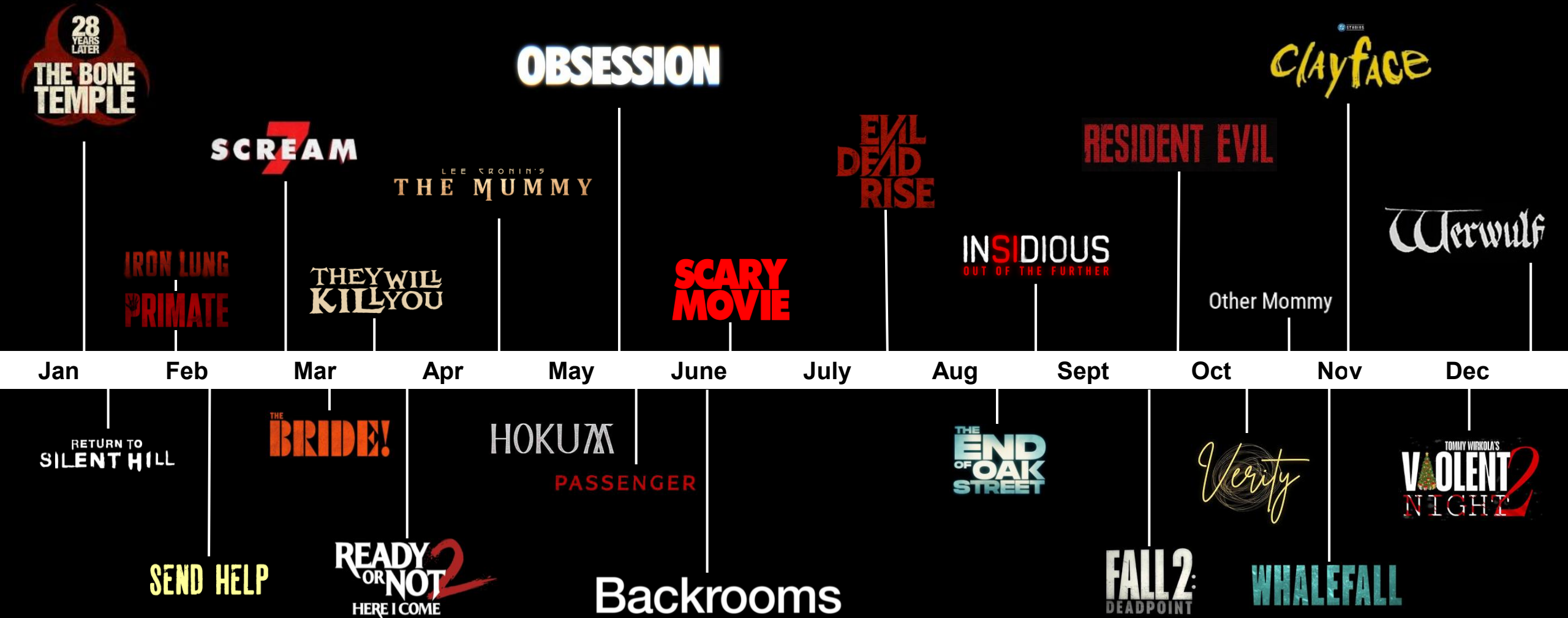
16 October



Clayface

23 October

2026 – a legendary year for Horror



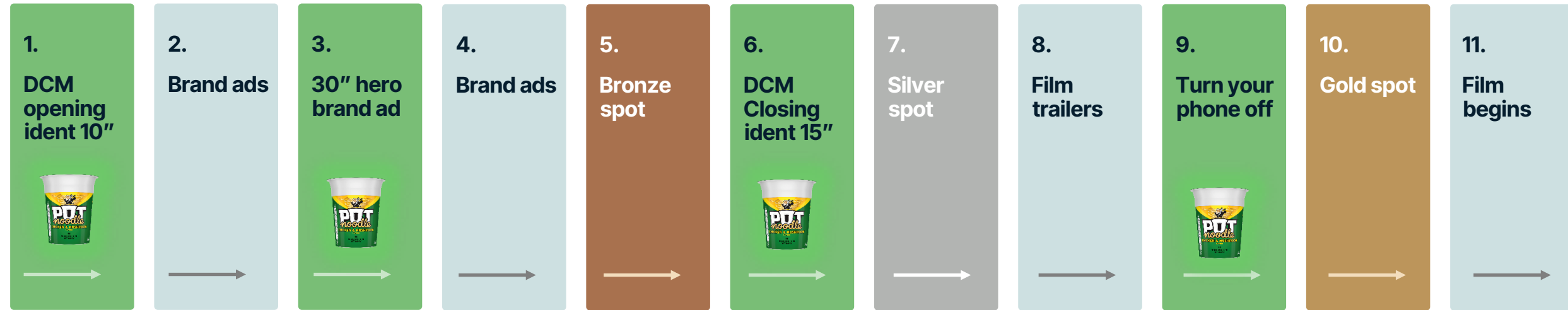
Pot Noodle: 'Dead Good Films'

Fully embracing the horror fandom to
connect at Cineworld

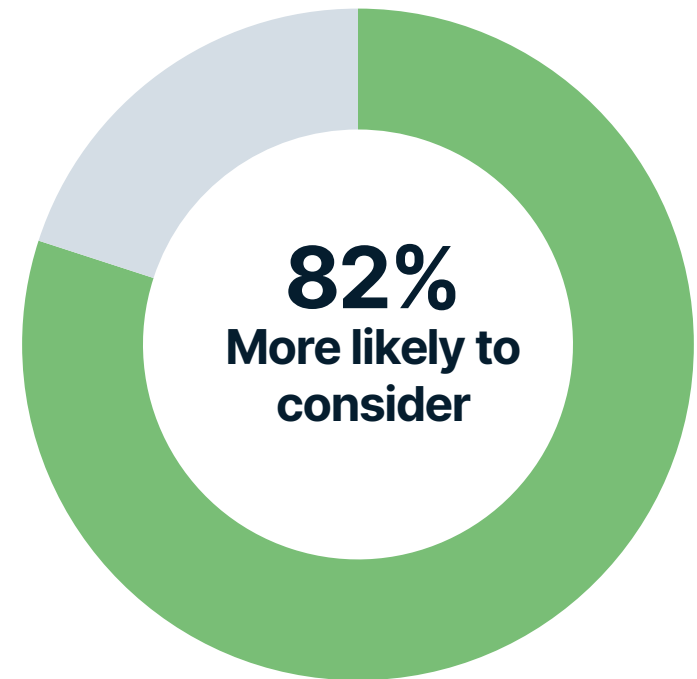
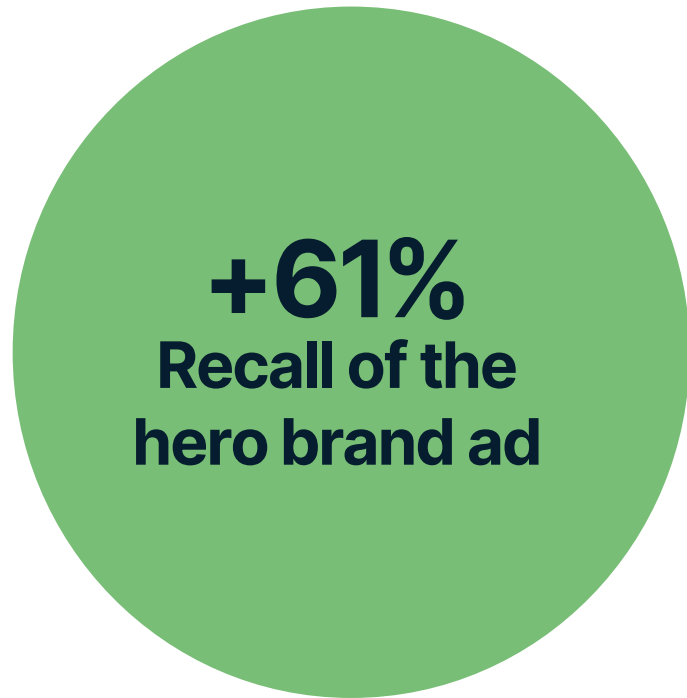


Pot Noodle presents 'Dead Good Films'

Built ownership in the high 16-24 indexing horror films - with presence including branded idents, the hero brand ad and TYPO message



'Dead Good' results



81% of cinemagoers who enjoy horror agree

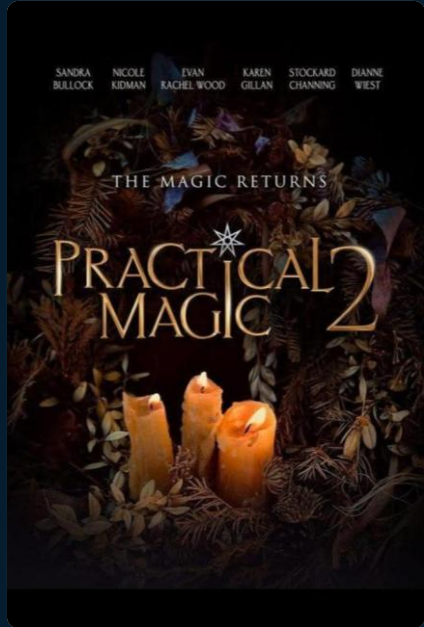
"I don't feel negatively towards a brand if they are advertised before a horror film at the cinema."

"When I watch adverts before horror films at the cinema, I don't associate the brands with the content of the film."

"I don't feel negatively towards a brand if they are in a horror film."

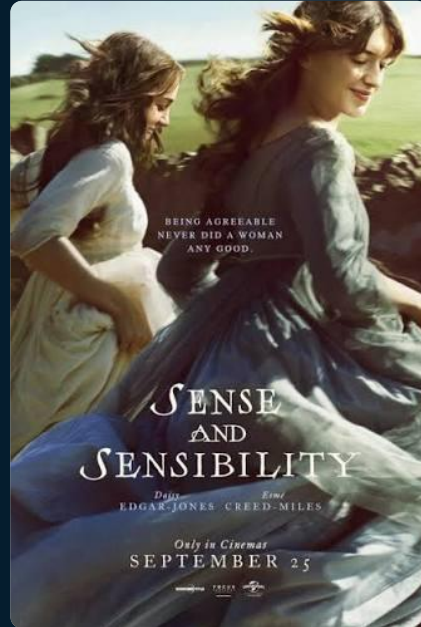
It's the most 'ABC1' time of the year

Cinema forecast to deliver 30 ABC1 Ad TVRs across Sep-Oct



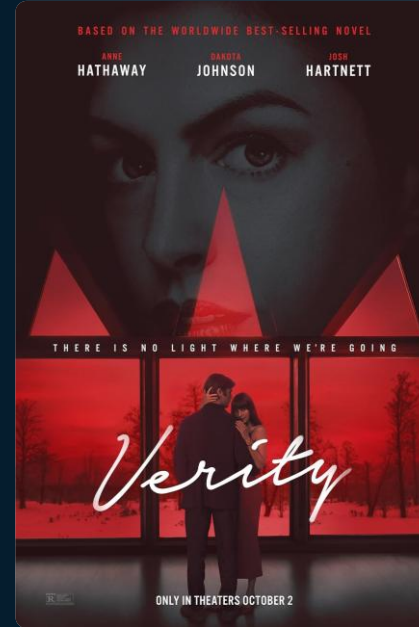
Practical Magic 2

11 September



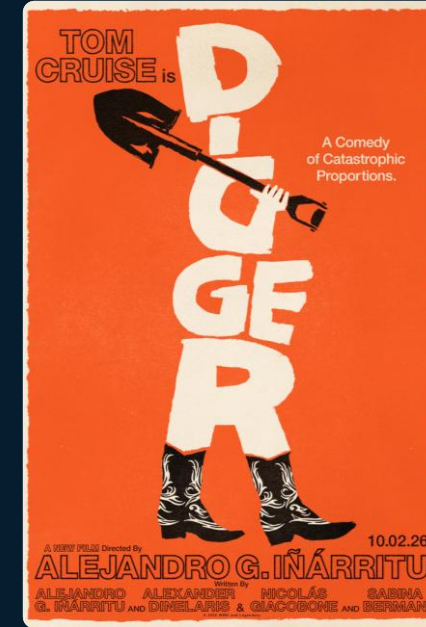
Sense & Sensibility

25 September



Verity

2 October



Digger

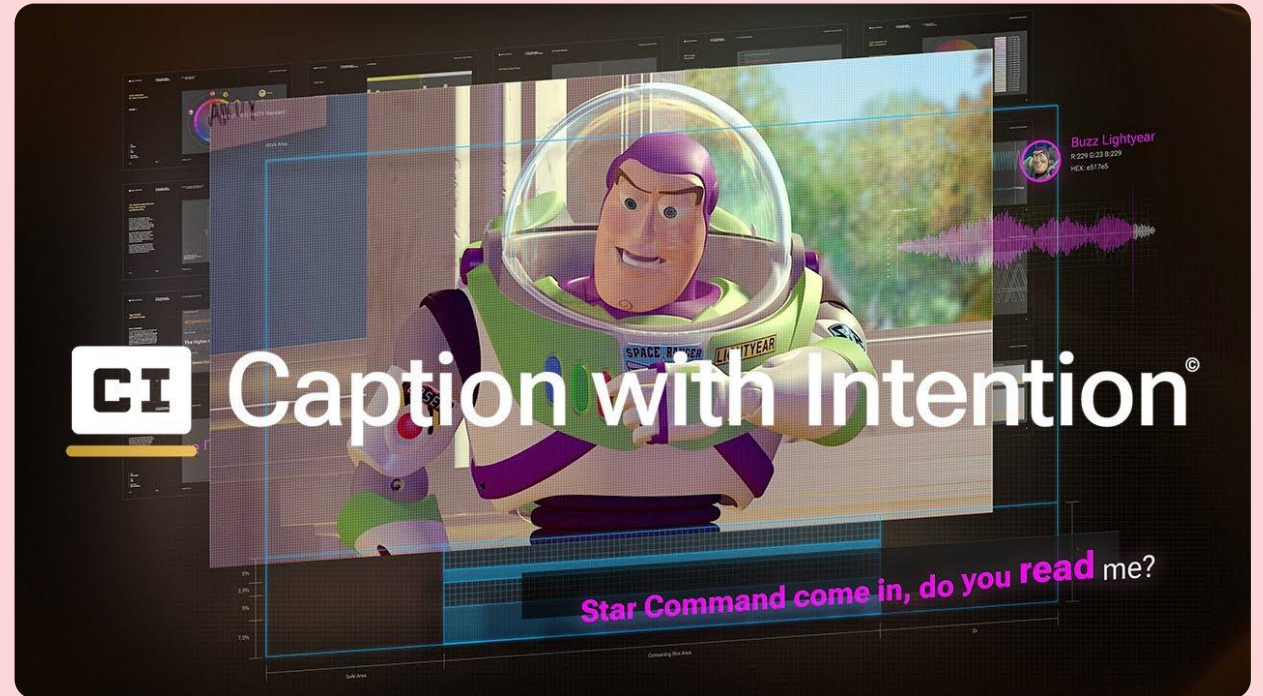
2 October



The Social Reckoning

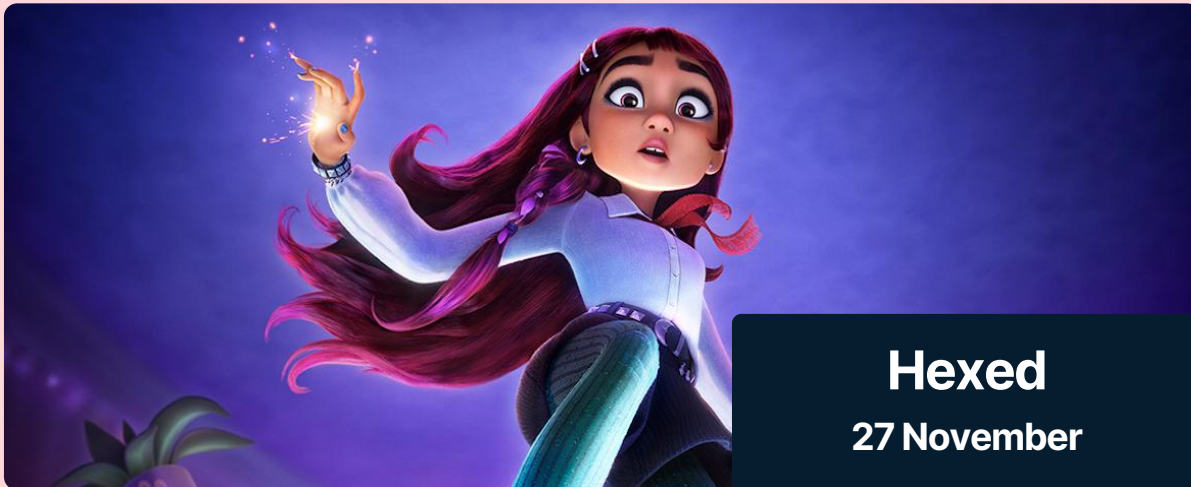
9 October

Building deeper connections with audiences



Films for the family

These four titles are set to collectively deliver 15 HPCH TVRS



McDonald's Friends Festival

Cinema Takeover



May the odds be ever in your favour this festive season



The Hunger Games: Sunrise on the Reaping

20 November

8 16-34 TVRs



Focker-in-Law

25 November

4 16-34 TVRs



Jumanji: Open World

11 December

12 16-34 TVRs

Cinema-goers assemble!



Avengers Doomsday

18 December

18 16-34 TVRs



Dune: Part 3

18 December

10 16-34 TVRs

Anamorphic 3D maximises creative and brand impact

DCM x Differentology Study

Recall

+9%

higher vs those who saw 2D ad

Perceptions

+15%

higher vs those who saw 2D ad

Intent to Act

+57%

higher vs those who saw 2D ad



Anamorphic 3D maximises creative and brand impact

Grey Mattr EEG Study

Attention

+23%

higher vs 2D equivalent

Engagement

+43%

higher vs 2D equivalent



Breadth & quality of films continues in 2027

Literary adaptations, original dramas, and new takes on IP set to continue box office success



Children of Blood & Bone

22 January

16-34 Index: 171



Narnia

12 February

HPCH Index: 177



A Place In Hell

26 February

ABC1 Women Index: 149



The Thomas Crown Affair

5 March

16-34 Men Index: 167

The Force is strong in H1 2027



2027 Highlights

Q1

Werewolf

NARNIA

STAR WARS
A NEW HOPE
EPISODE IV

The THOMAS
CROWN Affair

Disney · PIXAR
GATO

Q2

THE LEGEND OF
ZELDA

STAR
STAR FIGHTER
WARS

SHREK
5

SPIDER-MAN
BEYOND THE SPIDER-VERSE

OCEAN'S

Q3

A
MINECRAFT
MOVIE
SQUARED

STUDIOS
MAN OF TOMORROW

A QUIET PLACE
PART III

THE
SIMPSONS

BLUEY
THE MOVIE

Q4

THE
BATMAN
PART II

Disney
FROZEN III

THE
HOUSEMAID'S
SECRET

Marvel Studios
AVENGERS
SECRET WARS

— THE LORD OF THE RINGS —
THE HUNT FOR
GOLLUM

Film Partnerships



05. Closing

Karen Stacey
CEO, DCM



Digital Cinema Media Awards 2026



campaign



Cinema Campaign of the Decade: shortlisted campaigns



2015, 'Heineken Open Your Cities',
Heineken, Starcom Mediavest Group



2016, 'I know what you unboxed last summer',
Three and LG, Mindshare



2017, 'Channel 4 Paralympics',
Channel 4, OMD UK



2018, 'Max Factor: Putting a Spotlight on the
Leading ladies of Cinema', Coty, Zenith



2019, 'Lidl Movie Moments',
Lidl, Starcom



2022, 'Frighteningly Good: How Disney+ Jump
Started Their 18+ Audience', Disney+, Publicis



2023, 'Kia driving to the electric future with
independent cinema', Specsavers, MGOMD



2024, 'Stimulating Senses With 4DX And The
Royal Air Force', RAF, MGOMD



2025, 'Should've Gone To... Cinema',
Specsavers, MGOMD

Three weeks left to enter!

**Vote for your Cinema
Campaign of the Decade**



The Greatest Ad Show returns

In partnership with IPA President, Karen Martin, CEO, BBH

Welcome to
**THE GREATEST
AD SHOW**

Three key takeaways

Power of adding cinema to your media plans

**Culture that
resonates**

**Value of
measurement**

**Maximising
cinema's impact**