

16-24S

7 IN 10

16-24s FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR 16-24S

LIVE TV

Fill time	33%
Background viewing	25%
Low Attention	19%

BVOD

Binge viewing	28%
Fill time	24%
Quality content	17%

YOUTUBE

Fill time	44%
Binge Viewing	34%
Helps me escape	32%

SOCIAL VIDEO

Fill time	39%
Low Attention	26%
Binge Viewing	19%

CINEMA

Shared experience	39%
High attention	35%
Quality content	33%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



61% OF 16-24s AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

65% OF 16-24s AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

56% OF 16-24s AGREE
THAT "I TALK TO THE PEOPLE I GO TO THE CINEMA
WITH ABOUT THE ADS (WHILST WATCHING THEM)"

CINEMA IS THE PLACE FOR BRANDS TO TELL THEIR 'FULL STORY'

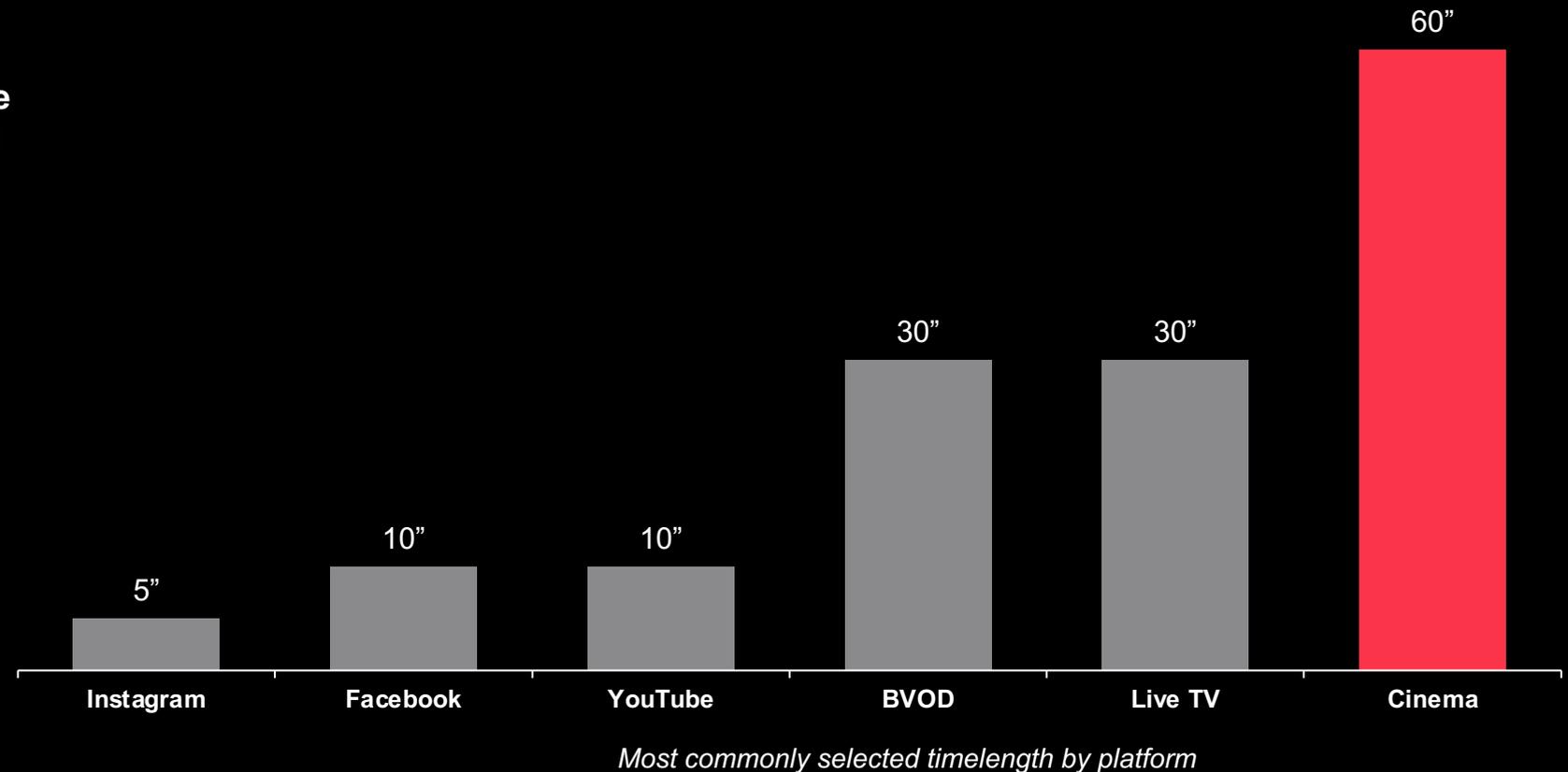
16-24s thought cinema was the best environment to showcase longer ads

"Social media moves fast and we want to be onto the next story so I think shorter advertising makes more sense there and on YouTube. However cinema is more immersive and has more of our attention so has good potential for longer advertising."

Female, 18

"The beauty of cinema advertising is that you have gone there for a purpose and you are definitely focused on the screen."

Female, 16-24



Q. You have to run a video advert on each of the 6 following platforms. Please can you select by (dragging and dropping) what length of video you think is the most suitable to run on each platform.

Base: 500 '16-24s'

BRANDS CAN BENEFIT FROM A TRANSFER OF POSITIVE ATTRIBUTES

PREMIUM

Cinema	46%
YouTube	18%
TV	15%
Social Media	12%
BVOD	9%

TRUSTWORTHY ADS

Cinema	32%
TV	29%
YouTube	19%
Social Media	11%
BVOD	9%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema	29%
YouTube	26%
TV	21%
Social Media	16%
BVOD	8%

16-24s. % ranked first

16-34 MEN

7 IN 10

16-34 MEN FEEL *'HOUNDED BY ADVERTISING'*



Q. To what extent do you agree or disagree with the following statements? (10 point scale – top 5 responses shown)
Base: 495 16-34 Men

CINEMA OCCUPIES A UNIQUE ROLE FOR 16-34 MEN

<i>LIVE TV</i>		<i>BVOD</i>		<i>YOUTUBE</i>		<i>SOCIAL VIDEO</i>		<i>CINEMA</i>	
Fill time	31%	Fill time	27%	Fill time	46%	Fill time	37%	High attention	34%
Background viewing	27%	Binge viewing	24%	Helps me escape	29%	Low attention	27%	Shared experience	34%
Low attention	19%	Quality content	18%	Binge viewing	25%	Spontaneous	19%	Immersive	32%

Q. Which of the following words and phrases do you associate with [...]?
 Bold phrases indicate highest association for this phrase

Base: 495 16-34 Men

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



66% OF 16-34 MEN AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

64% OF 16-34 MEN AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

54% OF 16-34 MEN AGREE
THAT "I TALK TO THE PEOPLE I GO TO THE CINEMA
WITH ABOUT THE ADS (WHILST WATCHING THEM)"

CINEMA IS THE PLACE FOR BRANDS TO TELL THEIR 'FULL STORY'

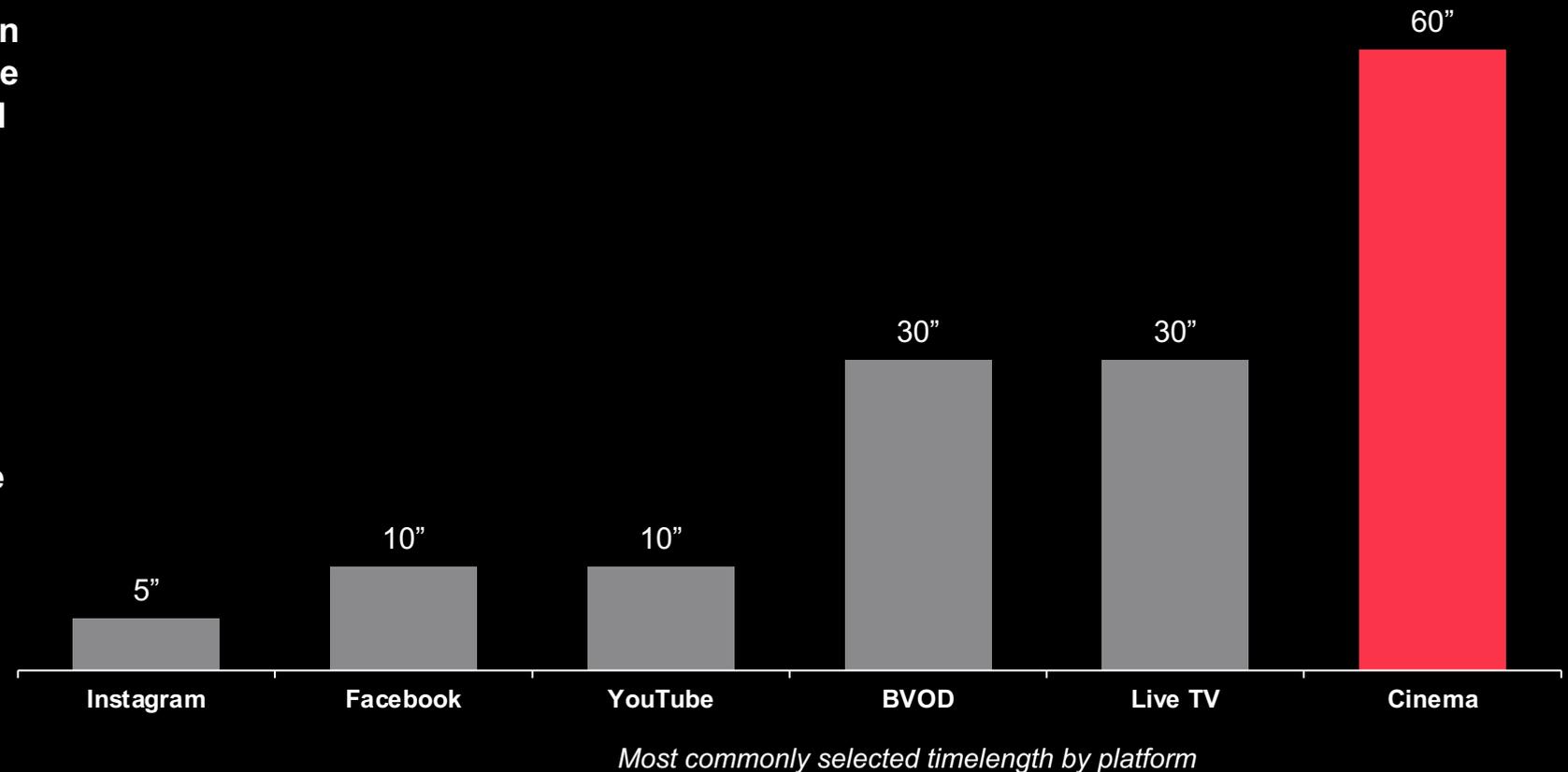
16-34 men thought cinema was the best environment to showcase longer ads

"Cinema has the most captivated audience, so longer timed ads can be shown. We are used to longer ads on TV, because we are not in control of the viewing on the channel. On the other three platforms we have control of what we want to see or not; this means we should not have to see long ads if we choose not to."

Male, 16-24

"I feel cinema is extremely immersive so running a longer advert will have higher impact. Social media is very scroll and swipe, so shorter catchy ads I imagine would be most captivating."

Male, 25-34



Q. You have to run a video advert on each of the 6 following platforms. Please can you select by (dragging and dropping) what length of video you think is the most suitable to run on each platform.

Base: 495 16-34 Men

BRANDS CAN BENEFIT FROM A TRANSFER OF POSITIVE ATTRIBUTES

PREMIUM

Cinema	44%
YouTube	19%
TV	19%
Social Media	10%
BVOD	9%

TRUSTWORTHY ADS

Cinema	33%
TV	30%
YouTube	20%
BVOD	9%
Social Media	9%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema	30%
YouTube	26%
TV	24%
Social Media	12%
BVOD	9%

% ranked first
Base: 495 16-34 Men

16-34 WOMEN

OVER 7 IN 10

16-34 WOMEN FEEL *'HOUNDED BY ADVERTISING'*



Q. To what extent do you agree or disagree with the following statements? (10 point scale – top 5 responses shown) = 74%
Base: 495 16-34 Women

CINEMA OCCUPIES A UNIQUE ROLE FOR 16-34 WOMEN

<i>LIVE TV</i>		<i>BVOD</i>		<i>YOUTUBE</i>		<i>SOCIAL VIDEO</i>		<i>CINEMA</i>	
Fill time	29%	Binge viewing	29%	Fill time	39%	Fill time	28%	Shared experience	43%
Background viewing	24%	Fill time	23%	Binge viewing	28%	Low attention	26%	High attention	34%
Comforting	22%	Quality content	21%	Helps me escape	26%	Sponataneous	20%	Quality content	33%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



78% OF 16-34 WOMEN AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

69% OF 16-34 WOMEN AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

59% OF 16-34 WOMEN 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

Cinema 52%

TV 16%

YouTube 12%

Social Media 12%

BVOD 9%

TRUSTWORTHY ADS

Cinema 36%

TV 33%

YouTube 11%

Social Media 11%

BVOD 9%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema 30%

TV 26%

Social Media 21%

YouTube 15%

BVOD 8%

18-34S

7 IN 10

18-34s FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR 18-34S

LIVE TV

Fill time	29%
Background viewing	26%
Low Attention	18%

BVOD

Binge viewing	26%
Fill time	25%
Quality content	19%

YOUTUBE

Fill time	43%
Helps me escape	27%
Binge Viewing	26%

SOCIAL VIDEO

Fill time	37%
Low Attention	27%
Spontaneous	19%

CINEMA

Shared experience	37%
High attention	34%
Quality content	30%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



73% OF 18-34s AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

66% OF 18-34s AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

57% OF 18-34s AGREE
THAT "I TALK TO THE PEOPLE I GO TO THE CINEMA
WITH ABOUT THE ADS (WHILST WATCHING THEM)"

CINEMA IS THE PLACE FOR BRANDS TO TELL THEIR 'FULL STORY'

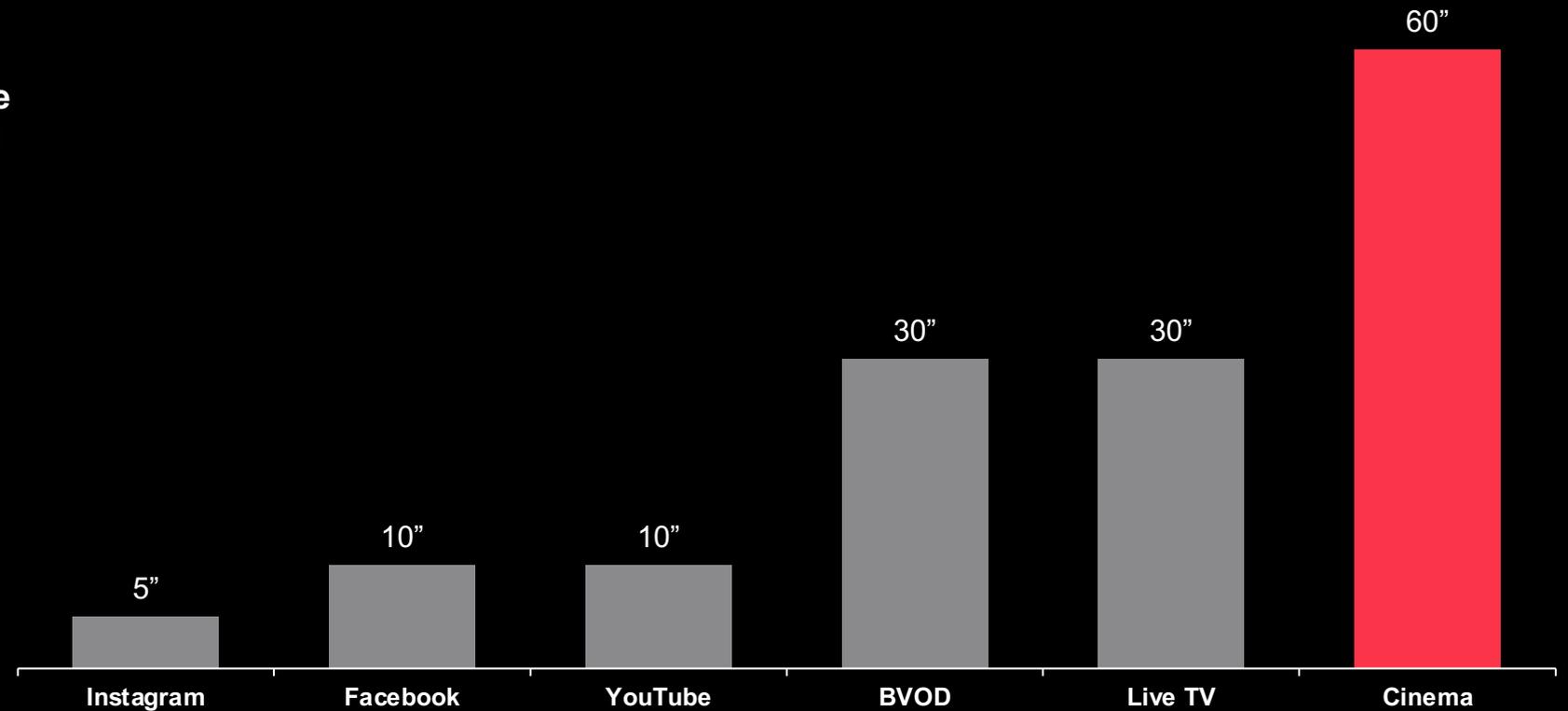
18-34s thought cinema was the best environment to showcase longer ads

“Social media moves fast and we want to be onto the next story so I think shorter advertising makes more sense there and on YouTube. However cinema is more immersive and has more of our attention so has good potential for longer advertising.”

Female, 18

“The beauty of cinema advertising is that you have gone there for a purpose and you are definitely focused on the screen.”

Female, 18-34



Q. You have to run a video advert on each of the 6 following platforms. Please can you select by (dragging and dropping) what length of video you think is the most suitable to run on each platform.
Base: 1000 '18-34s'

BRANDS CAN BENEFIT FROM A TRANSFER OF POSITIVE ATTRIBUTES

PREMIUM

Cinema	48%
Live TV	18%
YouTube	15%
Social Media	10%
BVOD	9%

TRUSTWORTHY ADS

Cinema	35%
TV	31%
YouTube	16%
Social Media	10%
BVOD	9%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema	30%
Live TV	26%
YouTube	20%
Social Media	17%
BVOD	8%

BUILDING BOX OFFICE BRANDS IV

***LAUNCH, LAND,
IMPACT***

ABC1 ADULTS

7 IN 10

ABC1 ADULTS FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR ABC1 ADULTS

Cinema is seen as a uniquely shared experience with the audience giving high levels of attention to the quality content, making it stand out within the variety of AV occasions.

LIVE TV

Fill time	27%
Comforting	26%
Quality content	26%

BVOD

Quality content	24%
Binge viewing	22%
Fill time	22%

YOUTUBE

Fill time	30%
Helps me escape	18%
Spontaneous	18%

SOCIAL VIDEO

Fill time	30%
Low Attention	23%
Spontaneous	17%

CINEMA

Shared experience	35%
High attention	34%
Quality content	32%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



75% OF ABC1 ADULTS AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

56% OF ABC1 ADULTS AGREE
THAT "I LOVE WATCHING STORES THAT I CAN GET
EMOTIONALLY INVOLVED IN"

56% OF ABC1 ADULTS AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

BRANDS CAN BENEFIT FROM A POSITIVE TRANSFER OF ATTRIBUTES USING TV+CINEMA

PREMIUM

Cinema 51%

TV 31%

YouTube 7%

BVOD 6%

Social Media 5%

TRUSTWORTHY ADS

TV 50%

Cinema 32%

YouTube 6%

BVOD 6%

Social Media 6%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

TV 43%

Cinema 31%

YouTube 9%

Social Media 8%

BVOD 8%

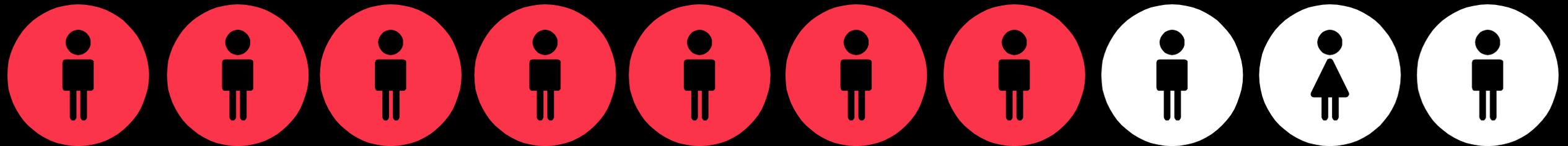
BUILDING BOX OFFICE BRANDS IV

***LAUNCH, LAND,
IMPACT***

ABC1 MEN

7 IN 10

ABC1 MEN FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR ABC1 MEN

Cinema is seen as a uniquely immersive, shared experience with the audience paying high levels of attention, making it stand out within the AV world.

LIVE TV

Quality content	30%
Fill time	27%
Comforting	24%

BVOD

Quality content	26%
Fill time	22%
Binge viewing	20%

YOUTUBE

Fill time	33%
Helps me escape	21%
Quality content	19%

SOCIAL VIDEO

Fill time	29%
Low Attention	23%
Spontaneous	17%

CINEMA

Immersive	35%
Shared experience	32%
High attention	32%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



72% OF ABC1 MEN AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

72% OF ABC1 MEN AGREE
THAT "I LOVE WATCHING STORES THAT I CAN GET
EMOTIONALLY INVOLVED IN"

56% OF ABC1 MEN AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

BRANDS CAN BENEFIT FROM A POSITIVE TRANSFER OF ATTRIBUTES USING TV+CINEMA

PREMIUM

Cinema 48%

TV 32%

YouTube 9%

BVOD 7%

Social Media 4%

TRUSTWORTHY ADS

TV 49%

Cinema 31%

YouTube 9%

BVOD 7%

Social Media 4%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

TV 42%

Cinema 32%

YouTube 11%

BVOD 8%

Social Media 7%

BUILDING BOX OFFICE BRANDS IV

***LAUNCH, LAND,
IMPACT***

ABC1 WOMEN

7 IN 10

ABC1 WOMEN FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR ABC1 WOMEN

Cinema is seen as a uniquely shared experience with the audience paying high levels of attention and valuing the escapism it brings - making it stand out within the AV world.

LIVE TV

Fill time	28%
Comforting	28%
Helps me escape	27%

BVOD

Binge viewing	24%
Quality content	22%
Fill time	21%

YOUTUBE

Fill time	27%
Spontaneous	18%
Helps me escape	15%

SOCIAL VIDEO

Fill time	30%
Low Attention	23%
Spontaneous	18%

CINEMA

Shared experience	38%
High attention	35%
Helps me escape	32%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



78% OF ABC1 WOMEN AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

77% OF ABC1 WOMEN AGREE
THAT "I LOVE WATCHING STORES THAT I CAN GET
EMOTIONALLY INVOLVED IN"

57% OF ABC1 WOMEN AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

BRANDS CAN BENEFIT FROM A POSITIVE TRANSFER OF ATTRIBUTES USING TV+CINEMA

PREMIUM

Cinema 54%

TV 31%

BVOD 6%

YouTube 5%

Social Media 4%

TRUSTWORTHY ADS

TV 51%

Cinema 33%

Social Media 7%

BVOD 5%

YouTube 5%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

TV 44%

Cinema 31%

Social Media 10%

BVOD 9%

YouTube 7%

BUILDING BOX OFFICE BRANDS IV

***LAUNCH, LAND,
IMPACT***

AB ADULTS

7 IN 10

AB ADULTS FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR AB ADULTS

Cinema is seen as a uniquely shared experience with the audience giving high levels of attention to the quality content, making it stand out within the variety of AV occasions.

LIVE TV

Quality content	26%
Fill time	25%
Comforting	25%

BVOD

Quality content	27%
Binge viewing	20%
Fill time	20%

YOUTUBE

Fill time	24%
Helps me escape	16%
Quality content	16%

SOCIAL VIDEO

Fill time	26%
Low Attention	19%
Spontaneous	16%

CINEMA

Shared experience	35%
High attention	34%
Quality content	34%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



78% OF AB ADULTS AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

78% OF AB ADULTS AGREE
THAT "I LOVE WATCHING STORES THAT I CAN GET
EMOTIONALLY INVOLVED IN"

62% OF AB ADULTS AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

BRANDS CAN BENEFIT FROM A POSITIVE TRANSFER OF ATTRIBUTES USING TV+CINEMA

PREMIUM

Cinema 51%

TV 30%

YouTube 8%

BVOD 6%

Social Media 5%

TRUSTWORTHY ADS

TV 50%

Cinema 32%

YouTube 7%

BVOD 6%

Social Media 5%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

TV 42%

Cinema 29%

BVOD 11%

YouTube 10%

Social Media 8%

16-34 WOMEN

OVER 7 IN 10

16-34 WOMEN FEEL *'HOUNDED BY ADVERTISING'*



Q. To what extent do you agree or disagree with the following statements? (10 point scale – top 5 responses shown) = 74%
Base: 495 16-34 Women

CINEMA OCCUPIES A UNIQUE ROLE FOR 16-34 WOMEN

<i>LIVE TV</i>		<i>BVOD</i>		<i>YOUTUBE</i>		<i>SOCIAL VIDEO</i>		<i>CINEMA</i>	
Fill time	29%	Binge viewing	29%	Fill time	39%	Fill time	28%	Shared experience	43%
Background viewing	24%	Fill time	23%	Binge viewing	28%	Low attention	26%	High attention	34%
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CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



78% OF 16-34 WOMEN AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

69% OF 16-34 WOMEN AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

59% OF 16-34 WOMEN 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

Cinema 52%

TV 16%

YouTube 12%

Social Media 12%

BVOD 9%

TRUSTWORTHY ADS

Cinema 36%

TV 33%

YouTube 11%

Social Media 11%

BVOD 9%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema 30%

TV 26%

Social Media 21%

YouTube 15%

BVOD 8%

18-34S

7 IN 10

18-34s FEEL *'HOUNDED BY ADVERTISING'*



CINEMA OCCUPIES A UNIQUE ROLE FOR 18-34S

LIVE TV

Fill time	29%
Background viewing	26%
Low Attention	18%

BVOD

Binge viewing	26%
Fill time	25%
Quality content	19%

YOUTUBE

Fill time	43%
Helps me escape	27%
Binge Viewing	26%

SOCIAL VIDEO

Fill time	37%
Low Attention	27%
Spontaneous	19%

CINEMA

Shared experience	37%
High attention	34%
Quality content	30%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



73% OF 18-34s AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

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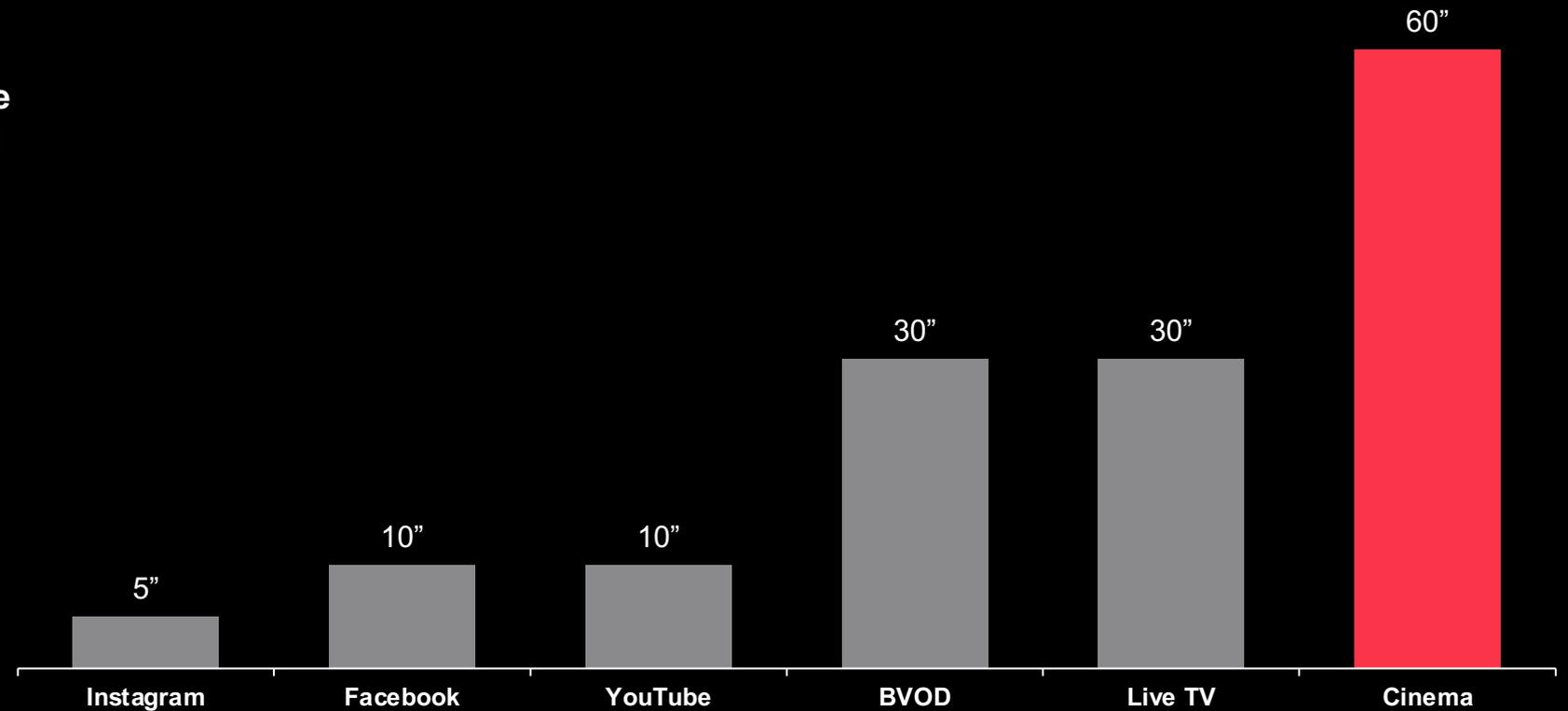
18-34s thought cinema was the best environment to showcase longer ads

“Social media moves fast and we want to be onto the next story so I think shorter advertising makes more sense there and on YouTube. However cinema is more immersive and has more of our attention so has good potential for longer advertising.”

Female, 18

“The beauty of cinema advertising is that you have gone there for a purpose and you are definitely focused on the screen.”

Female, 18-34



Q. You have to run a video advert on each of the 6 following platforms. Please can you select by (dragging and dropping) what length of video you think is the most suitable to run on each platform.
Base: 1000 '18-34s'

BRANDS CAN BENEFIT FROM A TRANSFER OF POSITIVE ATTRIBUTES

PREMIUM

Cinema	48%
Live TV	18%
YouTube	15%
Social Media	10%
BVOD	9%

TRUSTWORTHY ADS

Cinema	35%
TV	31%
YouTube	16%
Social Media	10%
BVOD	9%

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema	30%
Live TV	26%
YouTube	20%
Social Media	17%
BVOD	8%