

BUILDING **B**OX-OFFICE **B**RANDS

EXPLORING THE UNIQUE VALUE OF CINEMA
MEDIA IN TODAY'S CROSS-MEDIA LANDSCAPE

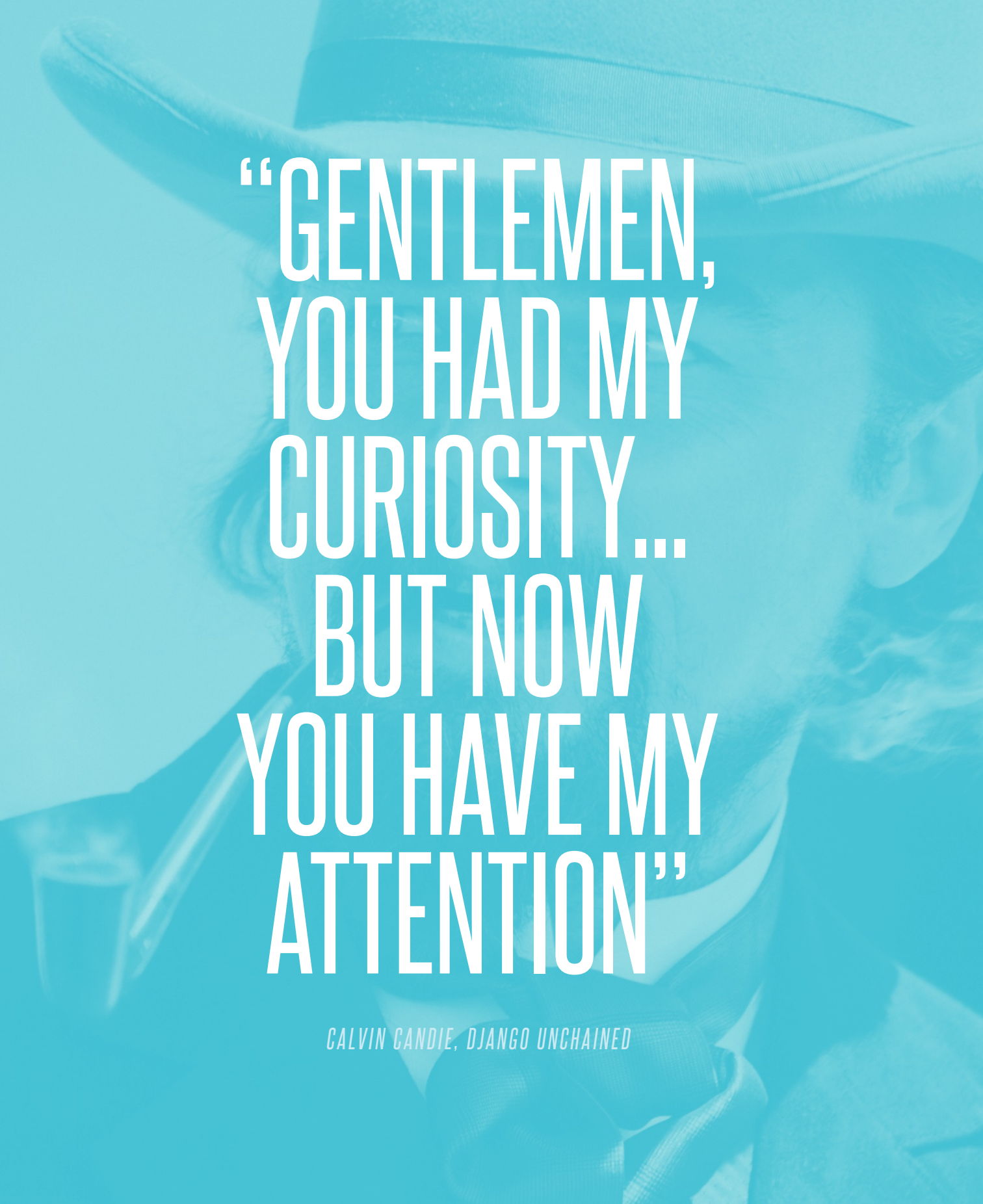


digital cinema media



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“GENTLEMEN,
YOU HAD MY
CURIOSITY...
BUT NOW
YOU HAVE MY
ATTENTION”

CALVIN CANDIE, DJANGO UNCHAINED

FOREWORD by Karen Stacey

CEO, Digital Cinema Media

We'll admit it: the wealthy landowner (played by Leonardo DiCaprio) in Tarantino's blockbuster Western wasn't talking about successful brand marketing. But he certainly could have been. Take it from creative director and thought leader Dave Trott instead: "What gets action is what gets attention. What gets attention is what gets seen. So being visible, being impactful, is the most important part of any communication designed to change behaviour."

Attention. It's the Holy Grail of modern marketing. According to the latest IPA Touchpoints 6 data, **87% of all adults now consume media simultaneously and brands are experiencing intense competition due to this 'attention deficit'**. Fast-changing media habits have led to more content, more screens and more ways than ever for brands to connect with their audiences.

Yet attention is exactly what Cinema delivers: captivated audiences, with wide eyes and pulsing emotions locked in sharp focus on the screen, while every possible distraction just disappears in the darkness. No wonder they can't stop talking about it afterwards. Cinema offers something to brands that's simply impossible to achieve on any other platform: **a shared media experience with the WOW factor.**

But what's the real value in this for brands? We wanted to truly understand Cinema's role in the media mix and the impact it delivers. To do this, we formed a partnership with Millward Brown to harness its CrossMedia approach, rapidly being seen as the global industry standard in multi-media measurement.

With media becoming increasingly fragmented, campaign plans have changed and so has the measurement of success. We're proud that Cinema media is at the forefront of this by working with Millward Brown on this research project.

We hope our initial analysis helps you navigate the increasingly complex cross-media landscape and, through our long-term partnership with Millward Brown, we will continue to measure Cinema's contribution as part of a cross-media plan.



“I WANT
TO REACH
PEOPLE ON
A PERSONAL
LEVEL”

JENNY CURRAN, FORREST GUMP

FOREWORD by Vincent Blaney

European Brand Director, Media & Digital, Millward Brown

Advertising covers every inch of our connected world. And that's the irony of media disruption. There have never been more channels for brands to reach their audiences, yet it's never been more difficult to engage people.

Brands now need to think cross-device, platform and channel to create coherent communications plans that amplify the consumer experience, meet consumer needs and build brand value. Within these communications, employing the right mix contributes hugely in delivering brand performance and ultimately driving revenues.

Our CrossMedia analysis shows that campaigns with more touchpoints tend to have greater impact and drive long-term value as each media has its own role to play and often amplifies the performance of other media. Through our partnership with Digital Cinema Media, it's also been hugely valuable to focus on the unique role that Cinema plays within the marketing mix and why it should be considered as part of an integrated media plan.

Looking at the brand impact of exposure to Cinema advertising clearly demonstrates that **Cinema delivers significant, and in some cases unbeatable, contributions to some of the most important brand metrics** – such as Brand Love and Brand Difference – ultimately leading to more powerful and more profitable global brands.

If you are interested in finding out more about Millward Brown CrossMedia analysis, please contact our Client Director, Hannah Walley at HannahW@millwardbrown.com.



Building Box-Office Brands is a new research study, brought to you by Digital Cinema Media (DCM) and Millward Brown, which explores the role of Cinema in today's cross media landscape. **Drawing on the combined learnings of 183 Millward Brown CrossMedia European case studies, with almost half from the UK**, it explores how each media performs against key metrics proven to drive brand value and sales growth. These metrics are core elements of Millward Brown's Meaningfully Different Framework which proves that brands which are 'Salient', 'Loved' and seen as 'Different' grow faster and command more of a price premium.



CINEMA MAKES BRANDS MEMORABLE

Cinema, Magazines and TV are the strongest contributors of Saliency (awareness) per person reached. Having strong Saliency means consumers are more likely to recall your brand when activated by an idea relating to retailer or category choice. That, in turn, drives sales volume.



CINEMA CREATES A BRAND LOVE STORY

Cinema makes consumers fall in love... with brands. No media channel is better at building Brand Love. It's also the most efficient, delivering 5.4% media ROI for every £1m invested. Love makes brands swell rapidly in value: consumers are far more likely to pay a premium for what they love.



CINEMA GENERATES BRAND DIFFERENCE

Cinema is the number one place to create Brand Difference, delivering the biggest contribution per person reached, and with almost 5x more efficiency than Online Video. Brands that are seen as 'Different' increase brand value, attract new customers, and command a price premium and stronger loyalty.



CINEMA TURNS AUDIENCES INTO CUSTOMERS

Cinema moves people. Cinema and Magazines are the most successful media at driving Consideration for brands. Cinema also has 20x the media ROI for efficiency vs TV. Consideration helps create customers and is a key brand metric at the furthest point of the purchase funnel.



CINEMA WINS INFLUENTIAL FANS FOR BRANDS

Cinema, Magazines and Online Video are the most effective media at driving Brand Recommendation. Word of mouth, particularly in today's socially networked world, creates brand advocates. A brand that can motivate consumers to talk about it is a brand with the power to significantly grow its sales.

WHAT THIS MEANS FOR YOUR NEXT CAMPAIGN



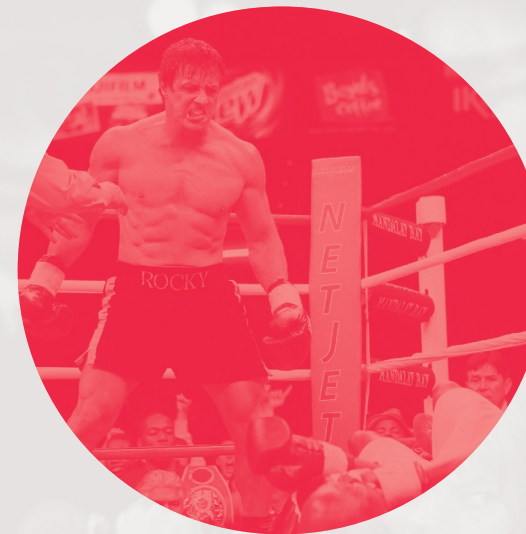
Integrated planning helps you stand out from the crowd. Businesses know this. They plough huge amounts of money into brand communications, all designed to effectively build brand health and wealth.

The goal hasn't changed: build brand preference among consumers and hold onto it. But the big challenge is now bigger than ever: **ensuring that communications do hit home in an increasingly cluttered environment.** Recognising the need to reach audiences on their terms, agencies are changing their thinking, using more media to stand out in more ways.

What has emerged, however, in a world of increasing ad clutter, is a fresh breed of savvy audiences who have become highly skilled at unconsciously detecting relevance and deleting irrelevance. The greater the clutter, the harder it is for ads to cut through to people. It's in this context that the role of Cinema begins to emerge.

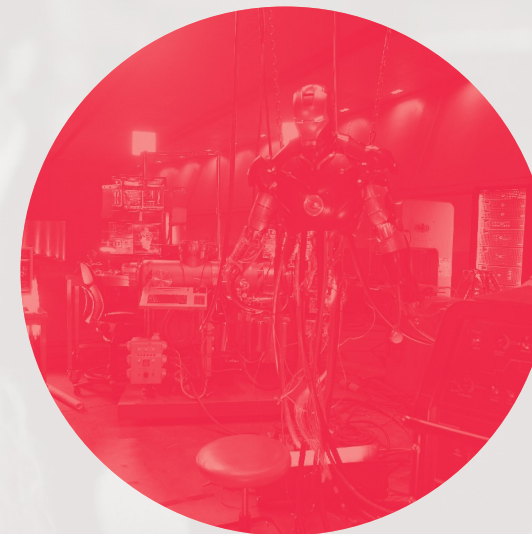
USE CINEMA TO CUT THROUGH THE CLUTTER

As today's brands need to stand out from the crowd, differentiate themselves and create an emotional connection like never before, Cinema provides perhaps the ultimate opportunity to do all of this and more. So while the Cinema experience – a darkened room, immersive sound, an awe-inspiring screen – hasn't changed in the past 100 years, the impact that it drives has magnified intensely. **Cinema is an uncluttered media environment where people have actually paid to pay attention.**



MAXIMISE THE IMPACT OF EVERY CONTACT

Today's marketers must focus not just on the consumer and media, but also on the environment. Brands need to think about the impact and efficiency of each person they reach through each channel and the roles these channels play in driving everyone's ultimate goal: sales. **Cinema creates an immersive experience, building brands for the long-term and extending campaign cover against traditionally hard-to-reach audiences such as 16-34s, ABC1s, Londoners, Dual-viewing families and Men.**



THINK EFFECTIVENESS AND EFFICIENCY OF OBJECTIVES

Return On Investment (ROI) isn't just about pounds and pence. If your campaign objective is about driving positive consideration for your brand, your media buying effectiveness needs to be measured against that. CrossMedia analysis helps media agencies and advertisers to do just that, allowing all elements within the plan to prove their strengths.



This is Millward Brown

In 55 countries around the world, Millward Brown specialises in advertising, marketing communications, media, digital and brand equity research. Key areas of focus? Brand strategy, creative development, channel optimisation and brand performance.

Understanding...
The Meaningfully Different Framework (MDF)

Millward Brown understands that brand value must always be intrinsically linked to the bottom line. Strong brands help companies to achieve higher share prices in good times and protect the business in times of crisis. In 2012, Millward Brown invested in a groundbreaking research and development project to take its equity model to the next level of insight generation. Through this work, they learned that brands which are meaningfully different are the ones that capture more volume share, command premiums and grow their value market share.

To do this, brands must be...

Meaningful (Consumers have affinity for the brand or think it meets their needs)

Different (Feels different to others or sets trends in the category)

Salient (Comes to mind quickly and readily when activated by ideas relating to the retailer or category choice)

This knowledge forms the basis of Millward Brown's equity model, the MDF. It shows, once again, that long-term success for brands means building their own brand equity alongside short-term sales.

Understanding... CrossMedia

Millward Brown CrossMedia data analysis is rapidly being seen as the global industry standard in multi-media brand measurement. It's designed to evaluate how paid marketing activities affect key brand equity measures such as awareness, engagement and consideration.

So how does it work? The approach uses controls for any underlying involvement factors (such as previous category interest and purchase behaviour) and ongoing influences (such as word of mouth or news coverage). This allows it to uncover the campaign's true influence on top of these other factors.

By understanding when marketing activity was running and what the media consumption habits of consumers were, Millward Brown is able to see how each media channel individually contributes to each brand metric.

How was this study done?

To evaluate the role of Cinema within the multi-media mix, Millward Brown drew on the combined learnings of 183 Millward Brown European case studies – including 88 from the UK. In fact, with almost half of all studies in the database coming from the UK, these studies make up an important part of the analysis. To ensure there is a good robust sample for each metric, results are shown at the European level, but the story is consistent with findings from the UK.

The metrics

Impact Per Person (IPP)

This metric only takes into account the impact among individuals who have *actually* been exposed to each media channel. By stripping out the influence of reach, Millward Brown puts all media channels on a level playing field.

Media efficiency
(Contribution per £1m)

As well as understanding the impact each media is having on key brand measures, it's also important to understand how efficient they are in doing this. For the purposes of this analysis, we're comparing the efficiency of each media based on what impact you would achieve for every £1m spent on the channel. This is calculated by looking at Impact Per Person reached/channel spend (in millions).

Base and media contributions

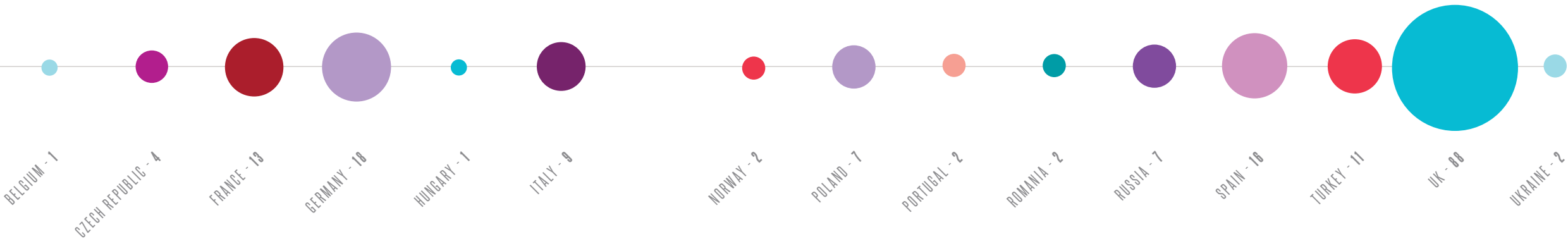
There are a number of factors such as brand category type, market position and

awareness that will vary considerably from brand to brand. For example, previous awareness of a highly established brand might be 99% vs a new launch brand which may be zero.

Millward Brown's meta-analysis therefore creates a performance benchmark for each channel and each brand metric. Normative databases of advertising effectiveness are becoming more important to make go / no go decisions about advertising allocations. When considering the size of the media contribution, Millward Brown also focuses on individual campaign performance as opposed to total brand health over time.

It's also important to note again that the CrossMedia analysis study strips out non-campaign contributions such as word of mouth and news coverage, so the results may look different compared to a traditional pre vs post methodology.

The fundamental idea behind the analysis is to understand which media channels contribute to each measure and which channels are best suited to driving different brand objectives.



INTRODUCTION: BUILDING A SUCCESSFUL BRAND CAMPAIGN

The media mix will also be influenced by whether the campaign is planned to build reach or to build frequency. For campaigns built around TV, levels of frequency need to be taken into account. For some categories, like finance or government campaigns, high frequency on TV is essential as messaging and understanding can take longer to build.

However, for many brands, this is unnecessary and can lead to some wastage. This money could be used to deliver valuable incremental reach, allowing audiences to experience your brand and message in a different way, influencing them at different parts of the purchase funnel.

In fact, whilst average campaign reach for Cinema is low at around 15%, Millward Brown demonstrates that **Cinema is able to efficiently target traditionally hard-to-reach audiences**. This corresponds to IPA Touchpoints 5 Channel planner data which shows **when just 5% of a £1.3m TV budget is re-invested in Cinema, it delivers 2% incremental reach against 16-34s, 4.7% for Housewives with Kids, 1.9% ABC1s and 6.2% for 16-34 year old Londoners**.

Other media, such as Online Video, can also deliver incremental reach to these audiences, but nothing has the receptivity, engagement and emotional power of Cinema.

1 ARE YOU REACHING THE RIGHT PEOPLE?

The foundation for most big brand campaigns will be TV, because of its unparalleled reach. But it's important to consider which other media to introduce into the media mix. Millward Brown's CrossMedia data analysis shows that campaigns with more touchpoints tend to have a greater impact. So where possible, multiple media should be used to deliver messages in the most efficient way.

2 IS YOUR MESSAGE RELEVANT TO THEM?

Creating memorable and compelling advertising that engages with a relevant audience, gives brands the greatest opportunity to resonate with consumers.

It may sound obvious, but Millward Brown analysis shows that relevance of ads improves campaign impact at every stage of the purchase funnel from awareness through to consideration.

But between 50-75% of the campaign impact is driven by the creative itself. TV has the greatest creative investment overall and adding Cinema to the AV mix can significantly increase the impact of the same creative.

According to DCM research, 95% of Cinema ads also run on TV, but 85% of Cinemagoers think it's a different ad. This mysterious boost to the perceived uniqueness of the ad is due to the inherent power of engagement in the Cinema: the big screen, superior sound, the opportunity to show longer creative, the darkened room, the exciting experience and the full attention the audience gives to the creative.

There is also a misconception around the types of brands and advertising that are suitable for Cinema. According to Millward Brown, pretty much any product category and brand can work. It doesn't need to be epic, it just needs to be entertaining. Advertising that's considered very enjoyable tends to be rated highly suitable for Cinema.

3 ARE THEY OPEN TO LISTENING AND SHARING?

The way we feel can significantly influence how receptive we are to advertising on any platform. People are considered to be either bored, relaxed or in an active frame of mind when consuming media.

Cinema is particularly effective at driving receptivity, because Cinemagoers are extremely relaxed – they've

actively chosen and paid for the experience. Out-of-Home advertising can also work well when consumers are under-stimulated, particularly when it is delivered in close proximity to purchase.

The sheer volume of ads we're exposed to can also influence how receptive we are. Media channels that suffer the most from this media clutter are TV and Online, due to their high levels of advertising vs content. Magazines and Cinema, on the other hand, have low levels of clutter: people are exposed to far fewer ads during the time they spend with each media. Combined with the audience's opt-in mindset, this allows ads to stand out strongly.

When people are actively opt in and engage with what they see on the screen and the printed page, brand messages are amplified by the media and absorbed by the audience.

When faced with heavy clutter, advertisers can choose from a number of strategies. Often the response, on TV for example, is to increase spend and take a larger share of voice. To some extent this makes sense, as Millward Brown research into long term and short term impact on brand has shown that when brands have a share of voice that's higher than their market share, they tend to grow.

However, outshouting the competition is not always wise. Very high frequencies on TV and excessively 'stalking' consumers with ads online based on behavioural data can lead to negative consumer response and diminishing media returns. With this in mind, channels such as Cinema are particularly effective at allowing brands to gain a higher share of voice within an uncluttered environment.

All three of the above questions are key to creating a successful campaign, but the most important ingredient is ensuring that each platform on the plan has a specific job to do – and that the success of the media is measured against that objective.

FIVE METRICS THAT MATTER

IN THIS SECTION, WE EXPLORE THE STRENGTHS AND WEAKNESSES OF THE DIFFERENT MEDIA ACROSS THE FIVE KEY BRAND METRICS WHILE HIGHLIGHTING THE KEY ROLE OF CINEMA IN THE MIX.

BRAND
SALIENCE

BRAND
LOVE

BRAND
CONSIDERATION

BRAND
DIFFERENCE

BRAND
RECOMMENDATION



“I REMEMBER
EVERYTHING...”

JASON BOURNE, THE BOURNE ULTIMATUM

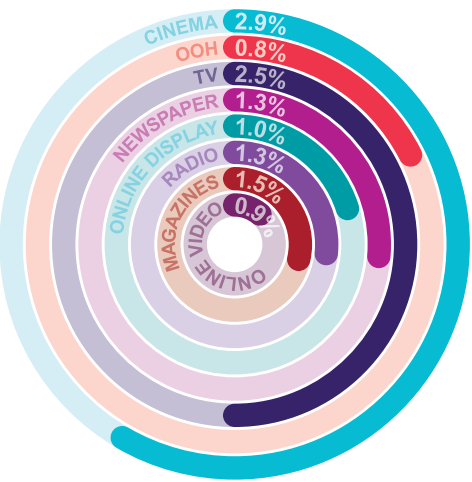
WHAT'S BROUGHT TO MIND IS WHAT'S BOUGHT... IT'S EASY TO UNDERSTAND THE EFFECT OF SALIENCE. SALIENCE (AKA AWARENESS) GIVES A BRAND AN ADVANTAGE, BECAUSE HUMAN BEHAVIOUR LEANS HEAVILY ON HABIT. WHEN SHOPPING, PEOPLE RELY ON MENTAL SHORTCUTS WHEN THEY MAKE THEIR BRAND DECISIONS. ONE OF THESE HABITS IS TO ASSIGN GREATER IMPORTANCE TO SOMETHING THAT COMES TO MIND QUICKLY WHEN TRIGGERED BY THE NEED TO CHOOSE.

In this study, Millward Brown looks at the combined elements that make up saliency metrics: Unaided Brand Awareness, Aided Brand Awareness and Total Brand Communications Awareness. We can then look at the media channels that are best placed to influence this overall metric and drive brand value and growth.

CrossMedia findings

Cinema is one of the three most valuable contributors for salience, alongside TV and Magazines, per person reached. TV has the advantage of frequency, while Cinema and Magazines benefit from far less advertising clutter than other media channels. Crucially, this means quality versus quantity of exposure. Cinemagoers are relaxed and receptive, therefore more likely to recall both the advertising itself and the brand which it's for. Where else do audiences take such time to immerse and invest themselves in media?

Media contribution to Brand Salience*



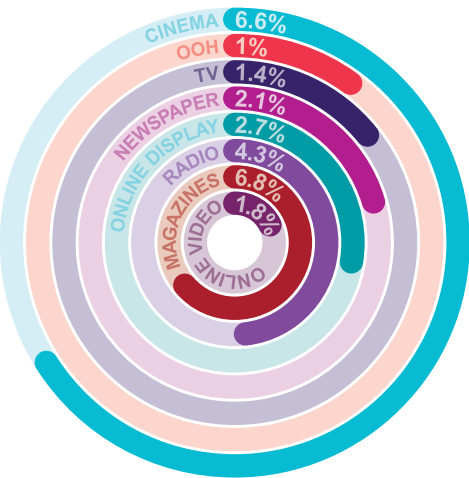
* % Impact per person

"CINEMAGOERS ARE MORE LIKELY TO RECALL BOTH THE ADVERTISING ITSELF AND THE BRAND WHICH IT'S FOR"

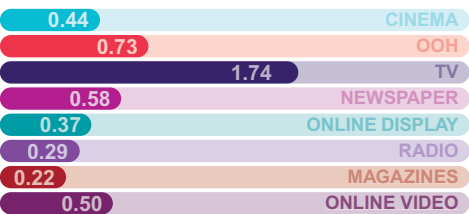
Cost efficiency

Clearly, it's not just about how many people you reach. It's about quality of exposure. The benefits of Cinema and Magazines become obvious when looking at cost efficiency and media return on investment (ROI) in delivering impact on awareness. For every £1m invested, you get 6.6% and 6.8% contribution to salience respectively. Average spend in Cinema and Online Video are similar (£440k / £500k), but Cinema is much more cost efficient. While Cinema reaches less people, those people are far more likely to take notice.

Media contribution per £1m spend



Average Spend (£ in M)



● CASE STUDY

Measure	Communications awareness
Country	UK
Category	Beverage
Objectives	Drive awareness and brand associations with sports event
Target audience	Broad but with secondary target of 16-34 adults
Total media spend	£3m approx

% Channel split



This case study for an established beverage brand is an example of how different media channels can work together to drive communications awareness measures. Of the 2.8% total contribution delivered for awareness, 54% was delivered by Cinema, with the remaining 46% delivered by TV. Although the campaign was targeted at a broad audience, it had a particular focus on reaching young adults.

"CINEMA IS VERY EFFICIENT AT DELIVERING THIS HARD-TO-REACH AUDIENCE"

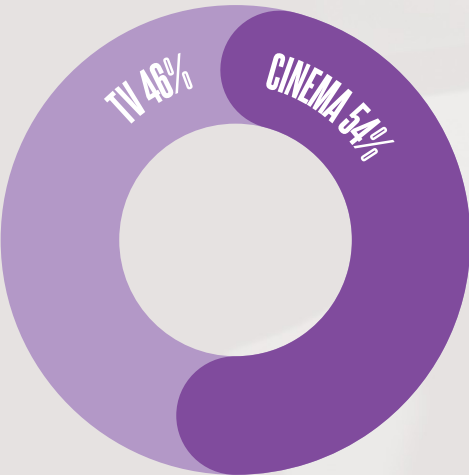
This youth demographic is a key factor behind why Cinema performed so strongly. On average 44% of total yearly Cinema admissions are delivered by 16-34 year old adults¹ – meaning it's very efficient at delivering this hard-to-reach audience. Well-planned Cinema campaigns can deliver significant increases in awareness, for a fraction of the cost of TV.

BASE CONTRIBUTION OF 49%

APPROX £3M TOTAL MEDIA SPEND



2.8% CONTRIBUTION TO SALIENCE



“ALL YOU NEED
IS LOVE!”

CHRISTIAN, MOULIN ROUGE

LOVE, ACTUALLY, INCREASES BRAND VALUE... BRANDS CAN'T SURVIVE ON LOVE ALONE. BUT IT REALLY DOES LIFT BRANDS UP WHERE THEY BELONG: BRANDS THAT ARE LOVED BY CONSUMERS GROW RAPIDLY IN BRAND VALUE – AND THE MILLWARD BROWN WPP BRANDZ 'LOVE' METRIC PROVES THAT THE IMPACT IS HUGE. OVER THE PAST 10 YEARS, BRANDS SCORING HIGH IN 'LOVE' INCREASED IN VALUE 10X MORE THAN BRANDS SCORING LOW IN 'LOVE'.

'Love' measures emotional affinity with a brand. It's not simply about making the brand fuzzy and friendly – although that's fine, if it's genuine – it's about building a true emotional bond between the brand and its customers. Crucially, this 'Love' means consumers are not only more likely to choose a brand, but are more willing to pay a price premium for it too.

In their IPA paper 'The Long and the Short of it', Les Binet and Peter Field demonstrated the same thing: “emotions are more powerful than rational messages and deliver twice the profit.”

BrandZ™ Global Top 100
10-Year Value Change

Top Third 'Love'
'Love' Index - 173

+227%
(10-Year Value Change)

Middle Third 'Love'
'Love' Index - 95

+39%

Bottom Third 'Love'
'Love' Index - 61

+22%

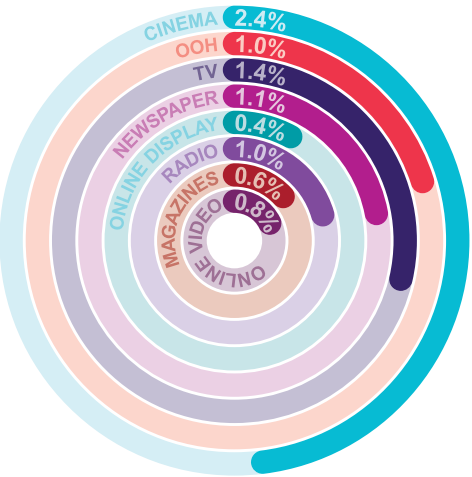
Three groups of brands from the 57 brands in the BrandZ™ Global Top 100 that have 10-year value change and the 'Love' metric

CrossMedia findings

We've established that Brand Love is a hugely important metric for brands to shift. So what media are best placed to do this? Having a wider media mix is an effective way to drive brand affinity and we can see that a range of media channels are capable of driving this metric. Cinema takes a runaway lead in driving Brand Love however, delivering 2.4% contribution to this measure for every person reached. TV is the second most efficient media, delivering 1.4% – almost 2x higher than the next most effective AV media, Online Video.

This leads us to ask, what therefore is Cinema's secret? A well-targeted audience, a high-quality experience and positive emotions associated with consuming Cinema are all drivers of the deeper brand affinity that Cinema can deliver for advertisers.

Media contribution to Brand Love*

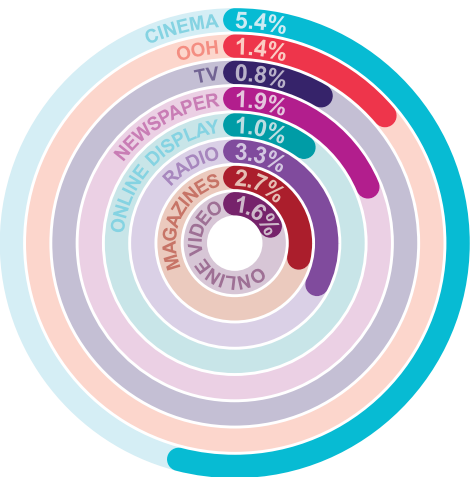


* % Impact per person

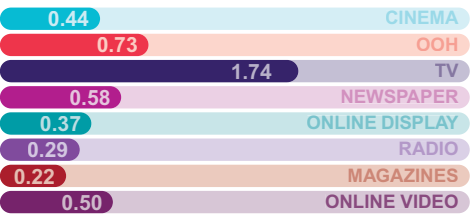
Cost efficiency

Cinema again leads the way in terms of return on investment in this measure, delivering a 5.4% increase for every £1m invested. Radio and Magazines are the second and third most efficient media, proving they're also valuable contributors to a wider media plan. In terms of AV, Online Video is the second most efficient channel after Cinema, delivering 1.6% contribution.

Media contribution per £1m spend



Average Spend (£ in M)



● CASE STUDY

Measure	Brand Love
Country	UK
Category	Automotive
Objectives	Increase consideration and desire for specific brand model
Target audience	ABC1 Men
Total media spend	£2m+

% Channel split



The campaign objective was to drive consideration and desire for a specific model of car amongst an ABC1 male audience. Overall media delivered 1.1% contribution to 'Brand Love'. Of this, 55% was delivered by Cinema, with the remaining 45% delivered by a combination of VOD and Online display.

"55% OF THE MEDIA CONTRIBUTION TO 'BRAND LOVE' WAS DELIVERED BY CINEMA"

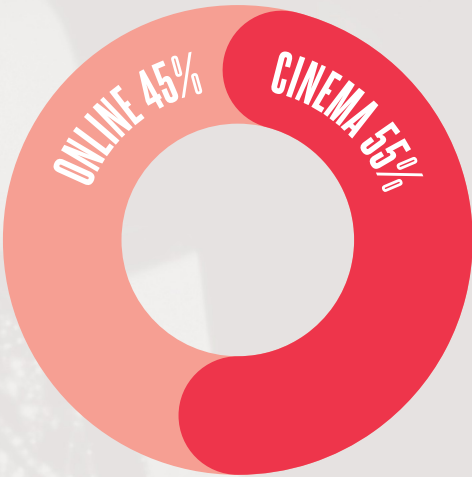
Cinema, by its nature, is emotionally connecting. The dark room, huge screen and surround sound allow the audience to be pulled in. It also has the benefit of being able to showcase creative to its full effect, aiding brand desire.

BASE MEDIA CONTRIBUTION OF 42.8%

£2M TOTAL MEDIA SPEND



1.1% MEDIA CONTRIBUTION TO LOVE



“I FEEL
DIFFERENT.
IS DIFFERENT
OKAY?”

BOB PARR, THE INCREDIBLES

BEING DIFFERENT IS WHAT
MAKES THE DIFFERENCE...
NEVER HAS IT BEEN HARDER
FOR BRANDS TO DIFFERENTIATE
THEMSELVES. AS SUCH, IN A
WORLD OF SO MANY PRODUCTS,
BRANDS THAT CONSUMERS VIEW
AS ‘DIFFERENT’ GENERALLY
ACHIEVE HIGHER BRAND VALUE.

Over the past 10 years, the brands which ranked in the top half of Millward Brown and WPP’s BrandZ Top 100 Most Valuable Global Brands achieved an average Difference score of 139 and grew 124% in Brand Value. Brands in the bottom half scored 96 in Difference and increased only 24% in Brand Value.

This matches with findings from Millward Brown’s Meaningfully Different Framework, which shows that brands who are able to differentiate themselves from the competition in a meaningful way are more likely to attract new customers, command loyalty and are able to charge a price premium.

How do brands achieve difference? It varies. The top-scoring brands on Difference are also seen as ‘creative’, ‘in control’ and ‘trustworthy’. It’s not enough to simply be ‘different’: that Difference needs to correspond to the brand proposition. Even brand category leaders, such as Coca-Cola or BMW, need to guard their leadership by constantly refreshing their brand message to remain unique.

Brand Value

Brands Ranked 1 to 50

139

Average Difference Score

+124%

10-Year Value Change

Brands Ranked 51 to 100

96

Average Difference Score

+24%

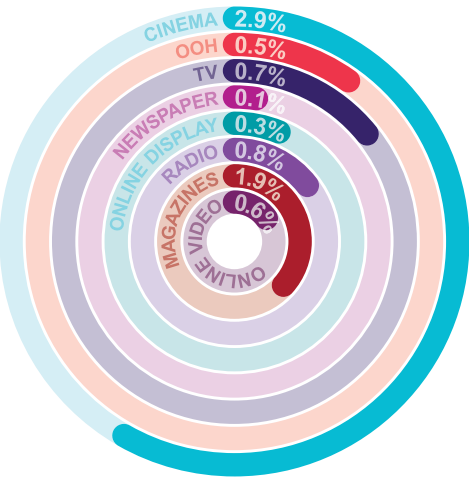
10-Year Value Change

CrossMedia findings

Once again, no media has greater impact on Brand Difference than Cinema: it delivers 2.9% contribution per person reached versus the next best performing media (Magazines at 1.9%). Given that many brands run their TV copy in Cinema – albeit an extended version in some cases – this suggests that it's the effect of the captive, clutter-free and engaging environment that's driving this impact more so than other AV channels.

To some extent, all media deliver a contribution to Brand Difference. But using the best-performers (Cinema, Magazines, TV and Radio) within your media plan is what gives advertisers the greatest opportunity to differentiate their brand from others.

Media contribution to Brand Difference*



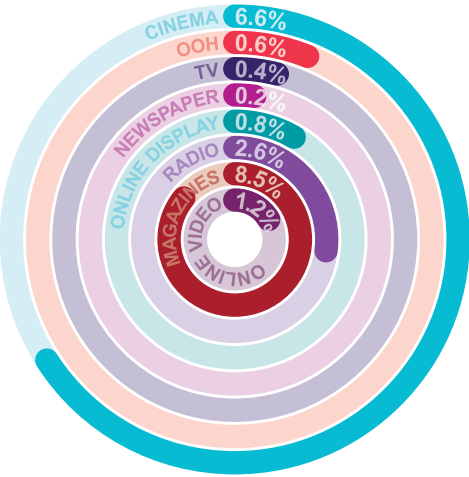
* % Impact per person

"NO MEDIA HAS GREATER IMPACT ON BRAND DIFFERENCE THAN CINEMA"

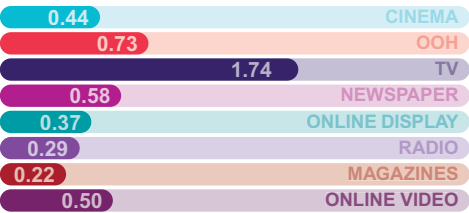
Cost efficiency

Cinema also delivers on differentiation when cost efficiency is taken into account. Cinema outperforms all other channels except for Magazines when it comes to delivering brand difference. This reveals what a valuable contributor Cinema can be as part of a brand's wider AV mix, helping to cost effectively boost this important measure.

Media contribution per £1m spend



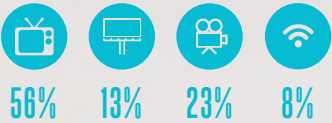
Average Spend (£ in M)



CASE STUDY

Measure	Brand Difference
Country	UK
Category	Media Brand
Objectives	Enhance brand perceptions
Target audience	Broad
Total media spend	£3m+

% Channel split



The campaign objective was to enhance brand perceptions and drive reappraisal. Cinema ran throughout the duration of the campaign to complement TV and Out-of-Home spend.

Here we can see that overall the campaign added just under 1% to overall perceptions of Brand Difference (significant contribution at 95% confidence level). Of the three media that contributed to this impact, Cinema delivered a third of this. When we look at percentage of overall media budget (23%) vs share of the impact for this measure (31%), we can see that Cinema is punching above its weight here compared to other media. Both Out-of-Home and TV were only able to deliver in line with investment.

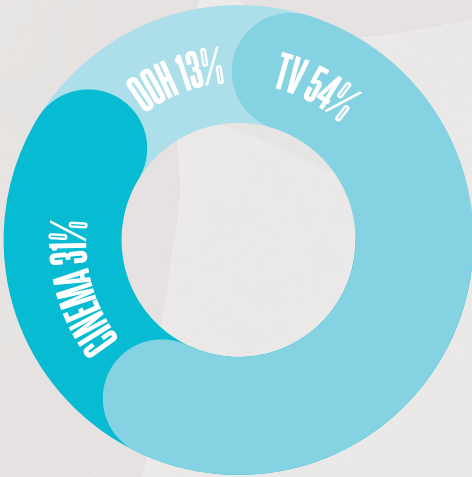
AV creatives for this campaign were strong. Short and long edits were used in combination to drive awareness and impact. TV showed the shorter copy length, a longer two-minute version, was shown in cinemas across the UK. The creative not only leant itself to the storytelling nature of Cinema, but also helped to differentiate the brand, resulting in a strong performance for Cinema overall.

BASE MEDIA CONTRIBUTION OF 22.3%

£3M+ TOTAL MEDIA SPEND



0.7% MEDIA CONTRIBUTION TO DIFFERENCE



HOW BRANDS TURN AUDIENCES INTO CUSTOMERS... CONSIDERATION MAY BE THE MOST IMPORTANT STEP ON A CUSTOMER'S PATH TO A PURCHASE. A CONSUMER CAN BE AWARE OF YOUR BRAND AND YET STILL NOT BUY YOUR PRODUCT. ONLY WHEN THEY REACH THE "CONSIDERATION" STAGE DO THEY MAKE THE ACTUAL DECISION TO BECOME A CUSTOMER. EVERY BRAND MUST DRIVE CONSIDERATION IN ORDER TO PLACE THEMSELVES IN THE STRONGEST POSSIBLE POSITION TO DRIVE SALES.

All of the metrics that we have covered so far help a brand begin to stand out from the crowd. However, consumers might still be left with several brands on their initial 'consideration shortlist' for a particular product. It's in this stage that media selection is particularly key – engaging people with a persuasive and compelling message can have a real impact and drive a brand to the top of the list.



“DO ME A FAVOUR,
TAKE THIS INTO
CONSIDERATION”

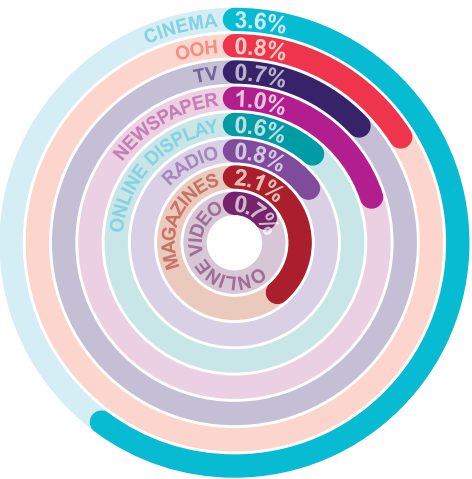
TOM HAGEN, THE GODFATHER

CrossMedia findings

We've seen how all media channels influence one or more parts of the MDF framework, so it follows that all are capable of impacting on Brand Consideration. But as with every other element of the funnel, some channels drive a higher impact on persuasion.

Magazines and Cinema are the most successful media at driving Consideration. Given Cinema's strong contributions to key engagement metrics – Brand Love and Brand Difference – it figures that this channel has a key influence on Consideration. We've seen how the Cinema screen can deliver a unique message to an appropriate audience. With strong creative and targeting, Magazines are also perfect for niche audiences. It's less good news for very high reach media such as TV and Out-of-Home, which can suffer from poorer channel engagement or lack of attention to creative.

Media contribution to highest levels of Consideration*
(Very / Quite likely Consideration scores)

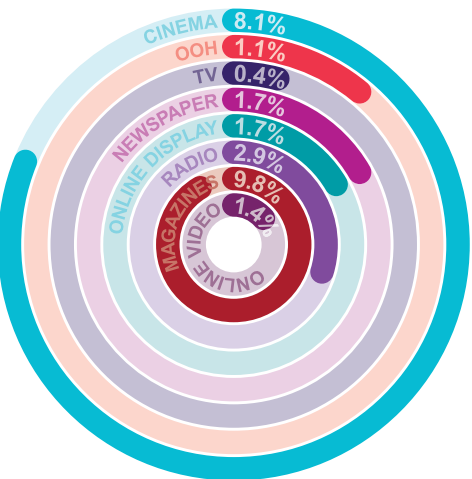


* % Impact per person

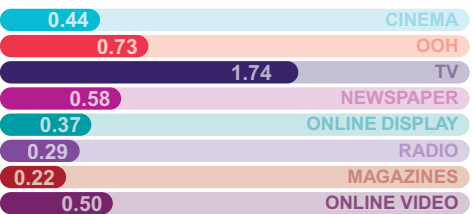
Cost efficiency

Whilst all other channels are more cost efficient than TV at driving their ontribution to Consideration, Cinema and Magazines dominate in terms of their media ROI. Cinema is fantastic at capturing audiences and converting them to buyers. This is backed up by findings from econometrics specialist BrandScience, which proves that Cinema delivers £2.84 Revenue Return on investment for every £1 invested.

Media contribution per £1m spend



Average Spend (£ in M)



CASE STUDY

Measure	Consideration
Country	UK
Category	Personal care
Objectives	Drive Very/Quite likely consideration and trial scores
Target audience	Broad (adults 18-65)
Total media spend	£3m+

% Channel split



This case study shows the very positive impact Cinema is capable of delivering on Consideration, even for FMCG brands targeting a broad audience. The campaign objective was to drive trial, and Cinema was phased to run after other media had launched, in order to drive deeper understanding of the brand once initial awareness had been established.

The total media contribution was 1.9%, of this Cinema delivered 50%, with the remaining 50% coming from TV. Taking into consideration that TV spend is 20x higher than Cinema, the result really highlights the influence and cost efficiency of Cinema at driving key persuasion measures.

"THE RESULTS HIGHLIGHT THE INFLUENCE AND COST EFFICIENCY OF CINEMA AT DRIVING KEY PERSUASION MEASURES"

BASE MEDIA CONTRIBUTION OF 42.8%

£3M+ TOTAL MEDIA SPEND



1.9% MEDIA CONTRIBUTION TO CONSIDERATION





“THAT’S THE
BEST THING
I’VE HEARD
ALL DAY”

PENNY KIMBALL, INHERENT VICE

WINNING BRANDS ARE BRANDS WITH FANS... A BRAND THAT CAN STIMULATE CONSUMERS TO RECOMMEND ITS PRODUCTS OR SERVICES TO OTHERS HAS THE POTENTIAL TO FURTHER ITS SALES GROWTH. THE BRAND METRIC RECOMMENDATION, SOMETIMES KNOWN AS ‘ADVOCACY’ OR ‘WORD OF MOUTH’, IS ANOTHER KEY INDICATOR OF MOTIVATIONAL PERFORMANCE.

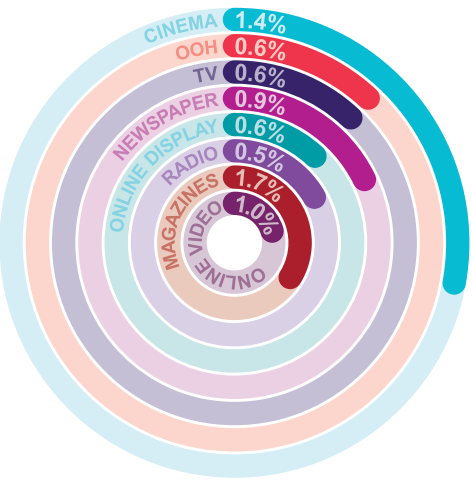
It’s easy to see why Recommendation is playing an increasingly more prominent role in marketers’ plans. First, there’s little doubt that word of mouth has a clear impact on sales and brand performance. In fact, Millward Brown found Recommendation to be one of the most influential touchpoints in creating brand demand and informing the decisions of people who are actively shopping a category.

Second, there’s good reason to believe that word of mouth has even more influence today than it did in the past. Three factors have boosted the relative impact of Recommendation in today’s marketplace: consumers’ dwindling trust of traditional marketing communications, the dizzying number of brand choices in most product and service categories, and the increased speed and breadth that information now travels.

CrossMedia findings

Cinema, Magazines and Online Video have proved their worth in this area, each delivering significant contributions. We see less success from Out-of-Home, TV, Online Display and Radio in terms of Brand Recommendation. Firstly then, this supports the notion that advertising drives advocacy. Secondly, results indicate that Cinema is not only a key contributor, but it provides significantly more impact than most media. Its ability to drive fans suggests that Cinema can play a key role in sparking offline brand discussion and purchase decision.

Media contribution to Brand Recommendation*



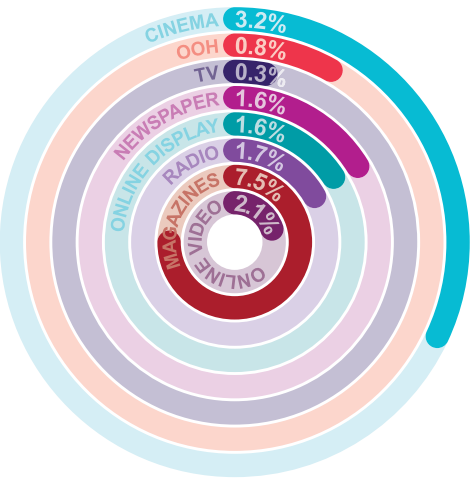
* % Impact per person

"RESULTS INDICATE THAT CINEMA IS NOT ONLY A KEY CONTRIBUTOR, BUT IT PROVIDES SIGNIFICANTLY MORE IMPACT THAN MOST MEDIA"

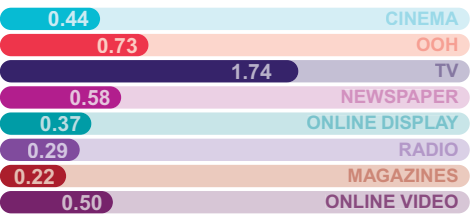
Cost efficiency

Not only does Cinema play a pivotal role for motivational measures, it does so at a much lower cost than other channels. This further highlights the importance of Cinema in the media mix.

Media contribution per £1m spend



Average Spend (£ in M)



CASE STUDY

Measure	Recommendation
Country	UK
Category	Male personal care brand
Objectives	Create 'buzz' and trial
Target audience	Men
Total media spend	£3m+

% Channel split



This case study shows the very positive impact which Cinema is capable of delivering on Recommendation. Despite a spend of over £3m, and a strong multi-media mix, Cinema was the only channel which was shown to deliver this measure.

This personal care campaign's objective was to introduce its new variant and generate 'buzz' and trial for the brand, as well as encourage participation in an exclusive competition. Cinema was phased to run in bursts to extend the multi-media campaign and help build and deepen perceptions of the brand. With around 3% of spend in Cinema, it is punching above its weight by delivering 100% of the impact on Recommendation.

"CINEMA WAS THE ONLY CHANNEL TO BE SHOWN TO DELIVER ON RECOMMENDATION"

BASE MEDIA CONTRIBUTION OF 49%

£3M+ TOTAL MEDIA SPEND



0.3% MEDIA CONTRIBUTION TO RECOMMENDATION

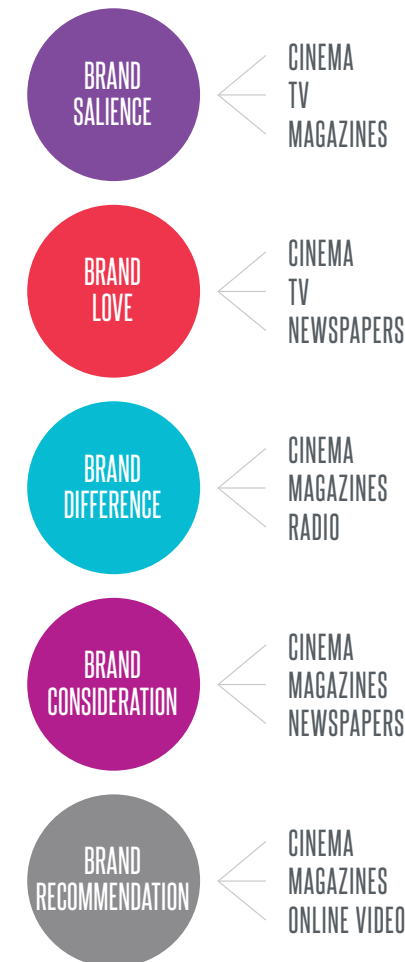


“IT WILL
MAKE YOU MORE
POWERFUL
THAN YOU EVER
IMAGINED”

PROFESSOR XAVIER, X-MEN: DAYS OF FUTURE PAST

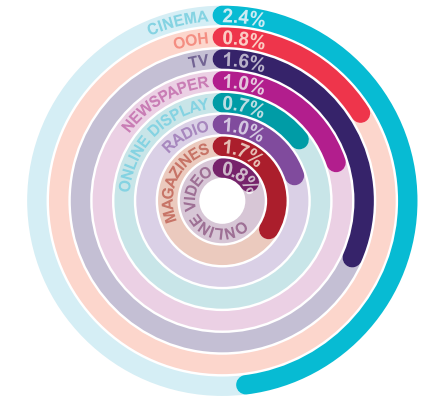
SO WHAT DOES ALL THIS MEAN
FOR YOUR MEDIA PLAN? MOST
SUCCESSFUL BRANDS USE A
MIX OF CHANNELS FOR THEIR
INDIVIDUAL STRENGTHS.

Top 3 Media per Brand Metric



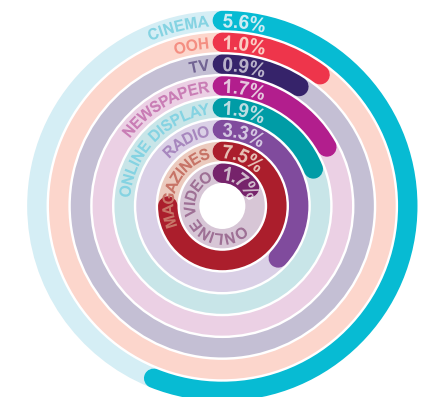
Total KPI Measures

Media contribution per person reached
(Average awareness, engagement and consideration measures*)

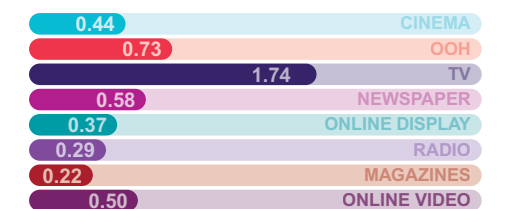


* % Impact per person

Media contribution per £1m spend



Average Spend (£ in M)

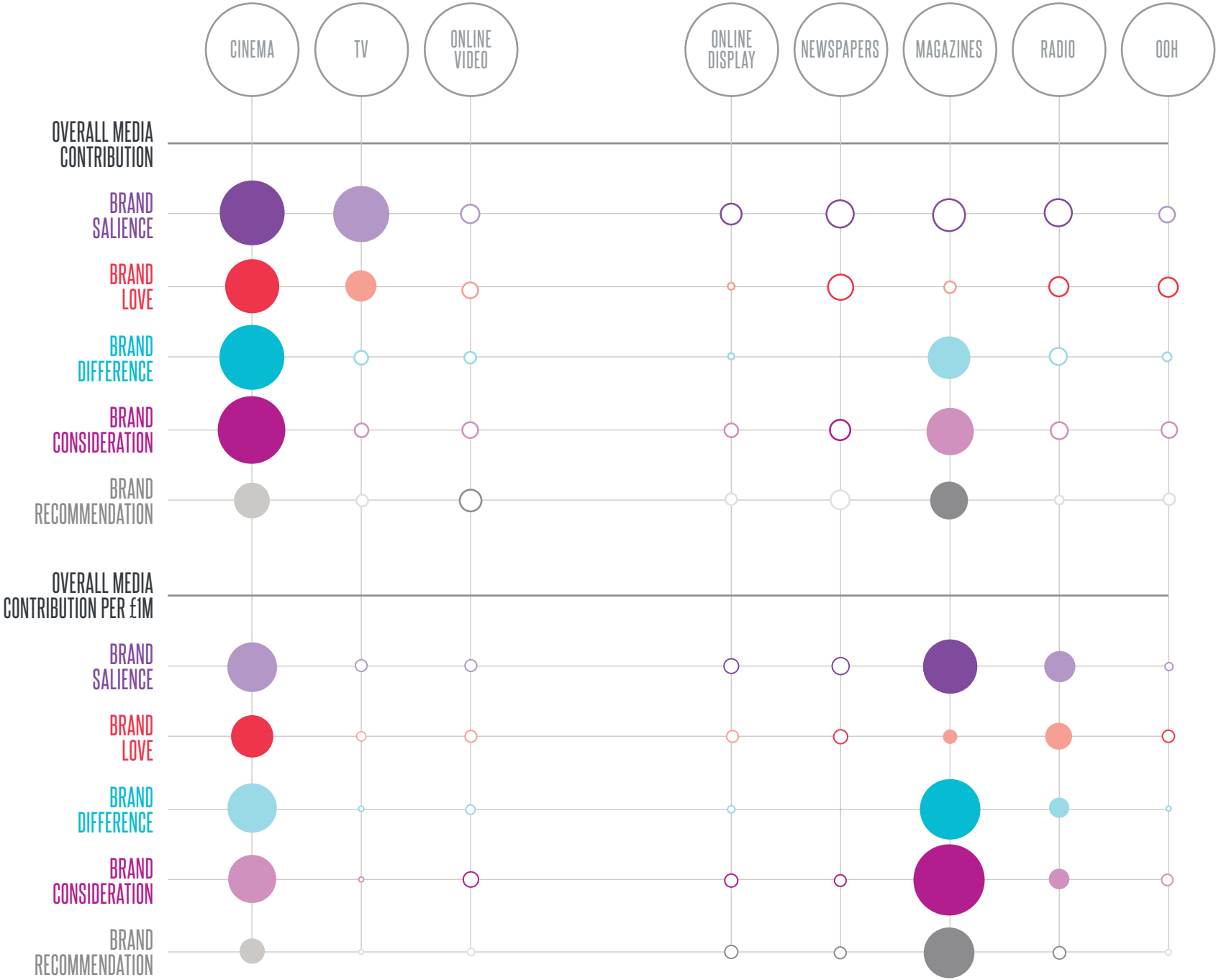


SUMMARY: THE CONTRIBUTIONS OF EACH MEDIA CHANNEL

To show which media are best suited at driving specific measures, we've created this colour-coded visual for you.

It's clear that all media channels can play a valuable role on the media plan to ultimately help create powerful brands. If we look at an average of the contributions that each channel has delivered, we see Cinema, TV and Magazines proving to be the biggest drivers of the five key brand metrics.

Yet it's also clear that some media are more cost effective than others. We've seen that Cinema consistently comes in the top two media in terms of efficiency, indicating that a campaign with Cinema on the plan will deliver better ROI.



Darker colour is the most impactful and the lighter colour is the least impactful

Contribution % Impact per person

WHAT THIS MEANS FOR ADVERTISERS

Whatever they're doing, every advertiser is trying to drive sales. We wanted to understand the link between boosting these brand metrics and achieving longer-term financial success.

We talked earlier about Millward Brown's insight that 'Meaningful Difference' is the mark of a successful brand. All of the key metrics included in this booklet help drive this. The Meaningfully Different Framework is used by Millward Brown to understand brand strength and how this correlates with brand equity and sales.

Analysis of the Millward Brown framework has highlighted how strengthening perceptions (and building a meaningful, different and salient brand) is vital to long-term financial success.

A powerful brand can benefit from 5x more volume, command a higher price premium and has a greater likelihood of growing its value share.

UNDERSTANDING THE IMPLICATIONS FOR AV CHANNELS



TV, Online Video and Cinema are all capable of delivering against campaign objectives, whether it is delivering brand engagement, building associations or driving motivation. But how do these AV channels work together and complement each other on a plan?

MORE PEOPLE, MORE EFFICIENT

TV-viewing is still the big reach-driver that most campaigns are planned around. Through our analysis, we have seen that both Cinema and Online Video can be far more cost effective at reaching the last 1-5% of an audience than plugging additional money into TV. Both media help to complement those audiences already delivered, and deliver additional impacts to those who are traditionally harder to reach, such as light TV viewers, young adults, men, dual-viewing families and ABC1s.



TARGETING CAPABILITIES

Targeting is also another key element of any campaign. Whilst TV delivers its message to a mass audience, Cinema can efficiently target specific demographics, either through its general audience delivery or tailored specifically by film. This helps it further drive efficiency and appeal. So rather than duplicating effort employed by TV, Cinema and Online Video with their excellent targeting capabilities and ability to deliver messaging at different points of the purchase funnel, should actually be seen as doing a different job.



BETTER TOGETHER

TV, Cinema and Online Video can all work well together. Reaching consumers in different frames-of-mind not only influences the length and style of the creative you show, but also what your audience will take out of it. Using all three media as part of your plan helps to deliver the right messaging, at the right time, when people are in the right mindset to consume it. For example, when watching TV we are typically laid back, but often multitasking, so creative needs to be engaging to grab our attention. When online we are typically lean forward and goal orientated so short tailored copy works well.

At the Cinema – like no other place in modern life – we tend to be engaged and relaxed with little distractions. We are more than a captive audience. We're a captivated audience. The differences between all three AV channels help each play a different role, so using them together on a plan can be really impactful.



HOW CAN CINEMA HELP YOU?

CINEMA IS IMPACTFUL. CINEMA IS EFFICIENT. CINEMA IS FOR ANYONE WHO NEEDS TO BUILD A BRAND THAT DELIVERS.

But why is Cinema media such an valuable opportunity right now? Because we live in an age of distraction and clutter, where audiences are giving less time and less attention to the media they consume.

Yet in a multi-screen world where attention is scarce and media is fragmented, this is the value of Cinema for modern marketers: an undistracted, uniquely engaged environment with the ability to shift powerful brand metrics.

Combining almost every storytelling medium – sound, music, movement, words – it may be the most emotionally impactful platform that has ever existed. Brands can think of it less as a screen and more as an open window to travel directly into consumers' hearts and minds. And that emotional impact converts directly into an increased willingness to pay more, driving brand value and sales growth.

It's the fully engaged mindset of the Cinemagoer that makes the platform so effective. Emerging as a key channel for helping marketers drive people through the purchase funnel, Cinema's contributions and cost efficiency in terms of brand engagement and motivational measures are notably strong.

We believe that these factors make choosing Cinema media one of the greatest opportunities for brands to drive impact in today's market. Indeed, when it comes to some of the most vital metrics such as Brand Love and Brand Difference, which enable brands to grow rapidly in value and command a price premium, Cinema's contributions are unbeatable.

SO, DO WE HAVE YOUR ATTENTION?

HOW TO GET INVOLVED: DCM & MILLWARD BROWN'S NEW CROSSMEDIA ANALYSIS



We know that the most powerful brand campaigns use a creative mix of channels to achieve their KPIs. However this has increasingly created a challenge for media owners and brands – how do you understand how successful the various media channels you are using are at delivering on the objectives you've set?

WHAT WILL DCM CROSSMEDIA ANALYSIS PROVIDE?

In 2016, DCM is partnering with Millward Brown to offer advertisers the chance to have their campaigns analysed using the CrossMedia methodology and provide a better evaluation of Cinema's role within the wider media multimedia mix. This solution allows DCM to provide advertisers access to trusted and unbiased cross-media measurement that will help them better understand how each channel used is working and how best to optimise the mix going forward.

The CrossMedia analysis will calculate the contribution of each campaign media used (for any media which has at least 10-15% reach against the specified target audience) on the following metrics – Awareness (brand and comms), Brand affinity, Love, Differentiation, Trust, Consideration and brand-specific measures agreed up front. Recommendations are then created to optimise future campaign spend allocations.

What media channels are included?

- **Cinema**
- **Digital Display, Online Video, Video on Demand**
- **Digital Paid Social**
- **Newspapers, Magazines and Supplements**
- **Out-of-Home**
- **Point of Sale (POS)**
- **Radio**
- **TV**



ELIGIBILITY CRITERIA

DCM will be funding a number of CrossMedia projects in 2016 and these will be available to those advertisers who are investing significantly in Cinema.

To be considered for measurement the campaign must be running for at least four weeks with a minimum investment of £250,000 on Cinema, and at least one other additional channel being used in the mix. Advertisers must also agree that the results can be made into a branded case study and used by DCM as part of ongoing communications, including publication on the DCM website.

Meeting this initial feasibility criteria however doesn't guarantee that the campaign will be measured – DCM retains final discretion on which campaigns will be approved for measurement.



FOR MORE INFORMATION

If you are interested in finding out more, or would like your campaigns to benefit from Millward Brown CrossMedia analysis, please contact your DCM representative or our Head of Insight, Sarah Dack at sarah.dack@dcm.co.uk.

If you are interested in finding out more about CrossMedia analysis, please contact Millward Brown Client Director, Hannah Walley at HannahW@millwardbrown.com.



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