

WELCOME TO AN INTRODUCTION TO CINEMA

AGENDA

1. Why cinema
2. The cinema marketplace
3. Mission 16-34: Launch, Land, Impact
4. Power of cinema within AV
5. How to buy cinema
6. DCM Studios
7. Live Brief
8. 2019: A year in film



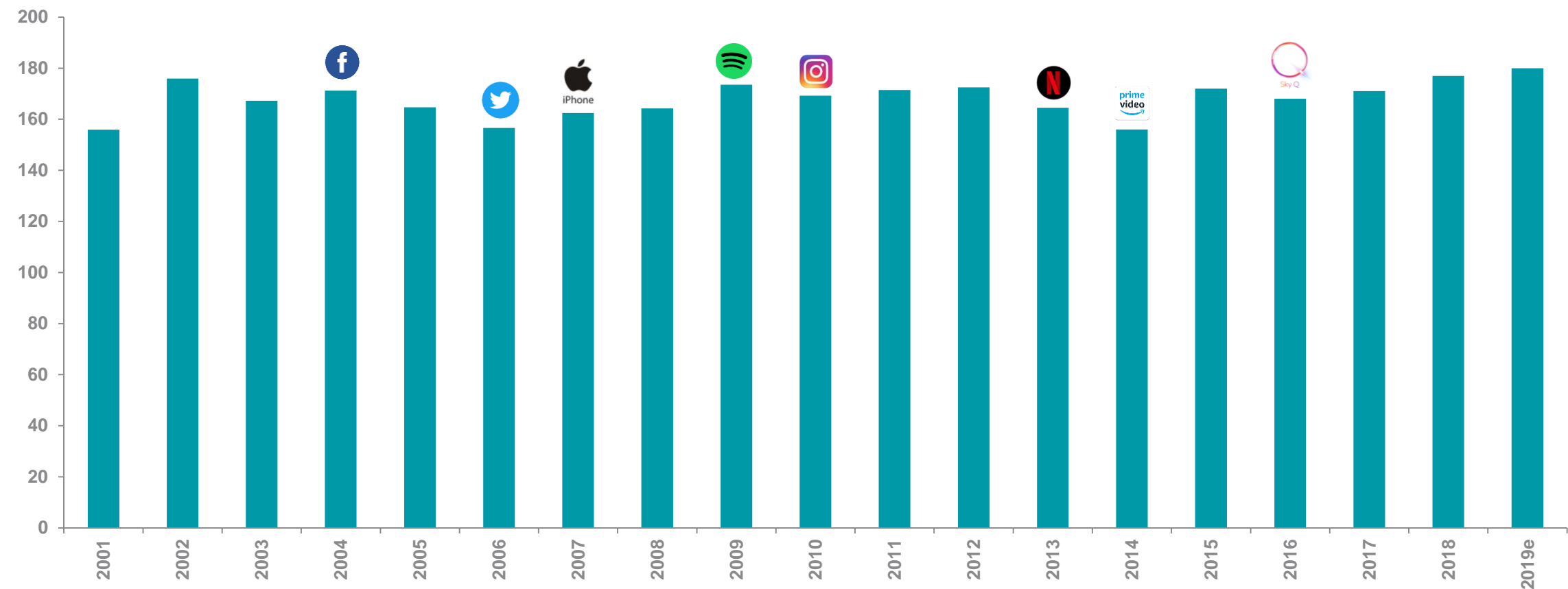
A photograph of an elephant lying down in a cage, with its head resting on the ground. The image is overlaid with a teal color filter. The elephant's eyes are visible, and it appears to be looking towards the camera. The cage bars are visible in the background.

WHY CINEMA?

Emyr John, Agency Manager

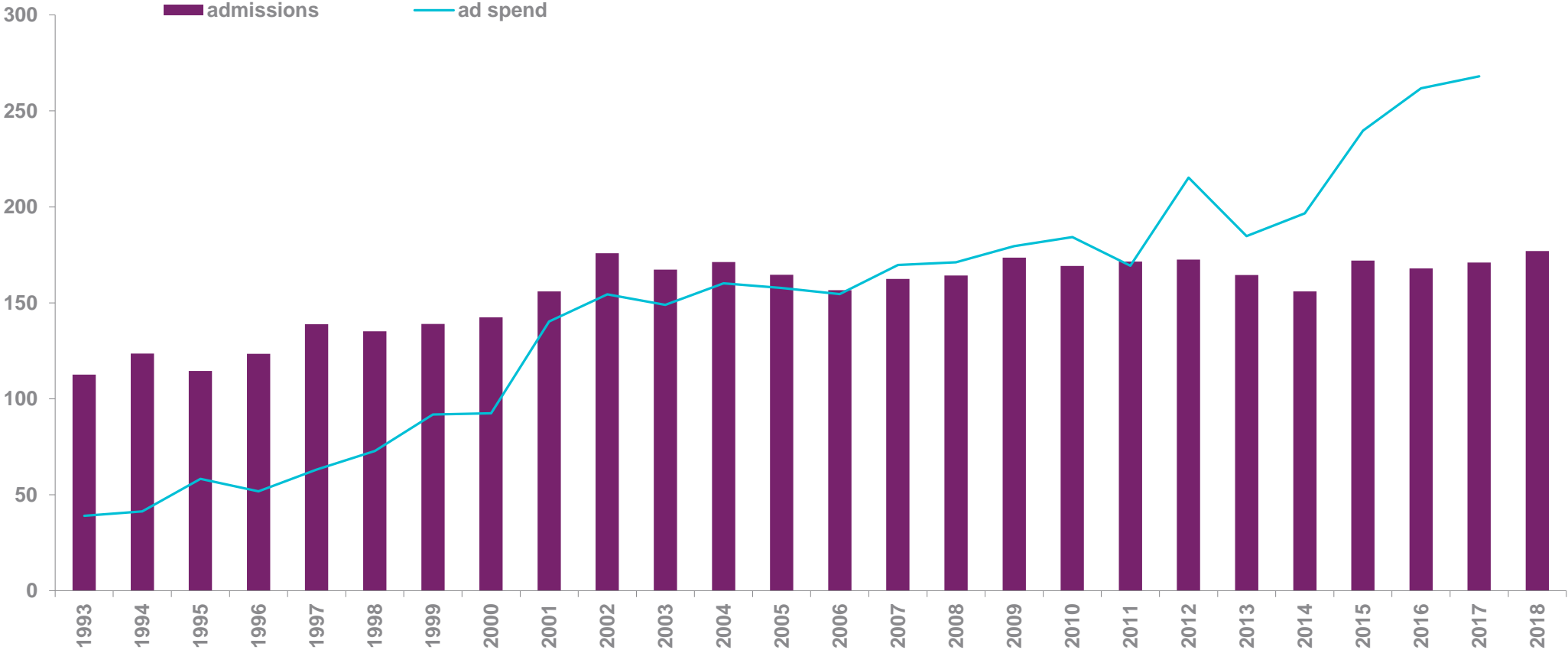
**CINEMA ADMISSIONS ARE
STRONG & STABLE**

STANDING THE TEST OF TIME



**CINEMA ADMISSIONS
HAD THEIR BEST YEAR
SINCE 1971**

CINEMA ADMISSIONS & AD REVENUE GROWTH



UK CINEMA – BOX OFFICE

2000 – £639m

2006 – £762m

2015 – £1.2bn

2016 – £1.3bn

2017 – £1.4 bn

2018 - £1.4 bn

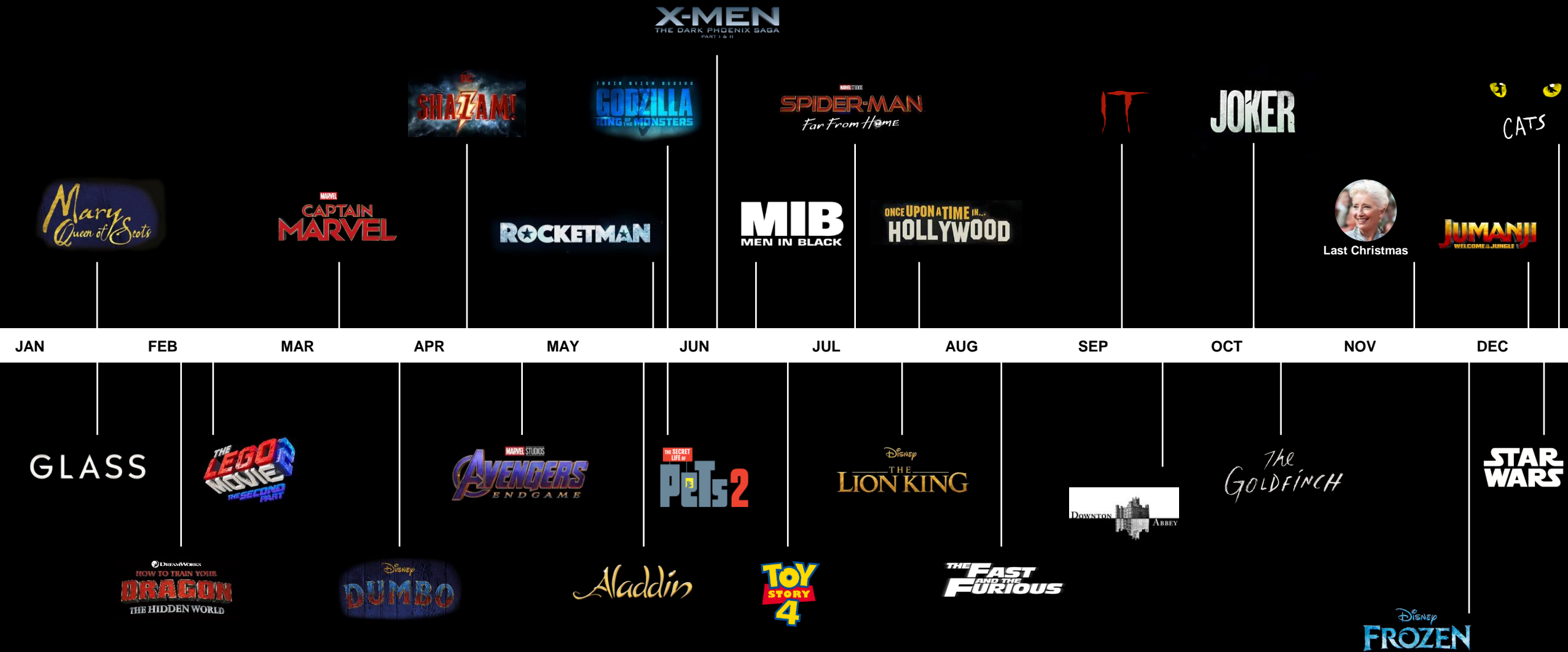
2019 est. – £1.4bn

2018 TOP TEN

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



2019 FILM SLATE



**CINEMA HAS NEVER
BEEN MORE RELEVANT**

UNDIVIDED ATTENTION

**A UNIQUE & ENGAGING
ENVIRONMENT**

**UNDISTRACTED
AUDIENCE**

**MAKING CINEMA
AN EVENT**

FIGHT FOR ATTENTION

**FRACTIONOUS TREND IN
MEDIA CONSUMPTION**

**DECLINING 16-34
AUDIENCES ACROSS
OTHER MEDIA**

**NOT ALL IMPACTS
ARE EQUAL**

UNIQUE CONTENT

**16 WEEK THEATRICAL
WINDOW IS GOING
NOWHERE**

**800+ RELEASES IN
2018 (MORE THAN
DOUBLE 2008)**

**CONSISTENTLY
STRONG
FILM SLATE**

IT'S NOT JUST THE AUDIENCE FLOCKING TO CINEMA

Superstars turn to the big screen



Beyoncé
The Lion King



Donald Glover
The Lion King



Lady Gaga
A Star is Born

THE ULTIMATE APPOINTMENT TO VIEW

**FILMS CREATE
CULTURAL MOMENTS**

**SHARED
EXPERIENCES**

“MUST SEE”

FAST FACTS

16-34 Adults

KEY INFORMATION



Audience

90% are cinemagoers
50/50 Male/Female



Admissions & frequency

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



Regional skew

34% London



Upmarket

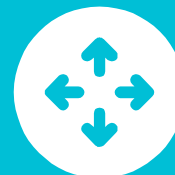
57% ABC1

CINEMA BEHAVIOUR



Attend

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



Foyer

Average dwell time **23 minutes**



Key footfall periods

Opening weekend + first week
Wednesday, Friday, Saturday



Technology

54% Browse internet on phone in foyer
52% Share their cinema trip on social media

THE BEST SEAT IN MEDIA



digital cinema media

THE CINEMA MARKETPLACE

Samantha Butters, Agency Manager

UK CINEMA – THE NUMBERS

810 SITES
4,390 SCREENS
+800,000 SEATS

DCM REPRESENTS 82% OF THE UK MARKETPLACE

Digital Cinema Media 82%

3,376

screens

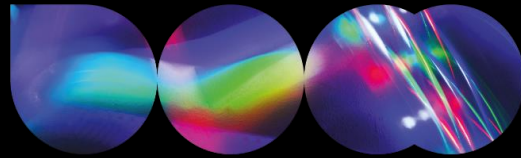
525

sites

P&D 18%

Pearl & Dean
is the only other
major competitor

DCM'S PARTNERS



digital cinema media



PLUS 160+ INDEPENDENT CINEMAS

INVESTMENT IN THE CINEMA EXPERIENCE





CINEWORLD SCREEN X (12)



CINEWORLD 02...

BIGGEST CINEMA IN LONDON

4,500



PICTUREHOUSE CENTRAL



CURZON RICHMOND



EVERYMAN LIVERPOOL



2019 GROWTH

26 CINEMAS
6M ADMISSIONS

COMING SOON...



VUE Eltham
April / 6 screens



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



Everyman Manchester
May / 3 screens

BUILDING BOX OFFICE BRANDS IV

MISSION 16-34

LAUNCH, LAND, IMPACT

Michael Tull, Research and Insight Manager

THE APPROACH

EXPLORE

AV HABITS

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

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

DEFINE

*CINEMA
EXPERIENCE*

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

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

QUANTIFY

KEY THEMES

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

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

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

LAUNCH

*YOUR
CAMPAIGN*

LAND

*YOUR
MESSAGE*

IMPACT

*YOUR
AUDIENCE*

A full-page background image featuring Tom Cruise in a dynamic running pose, wearing a dark jacket and pants. He is positioned in the foreground, slightly to the right. In the background, the iconic dome and classical architecture of the United States Capitol building are visible. The entire image is overlaid with a semi-transparent blue filter. The word "LAUNCH" is centered in a large, white, italicized sans-serif font.

LAUNCH

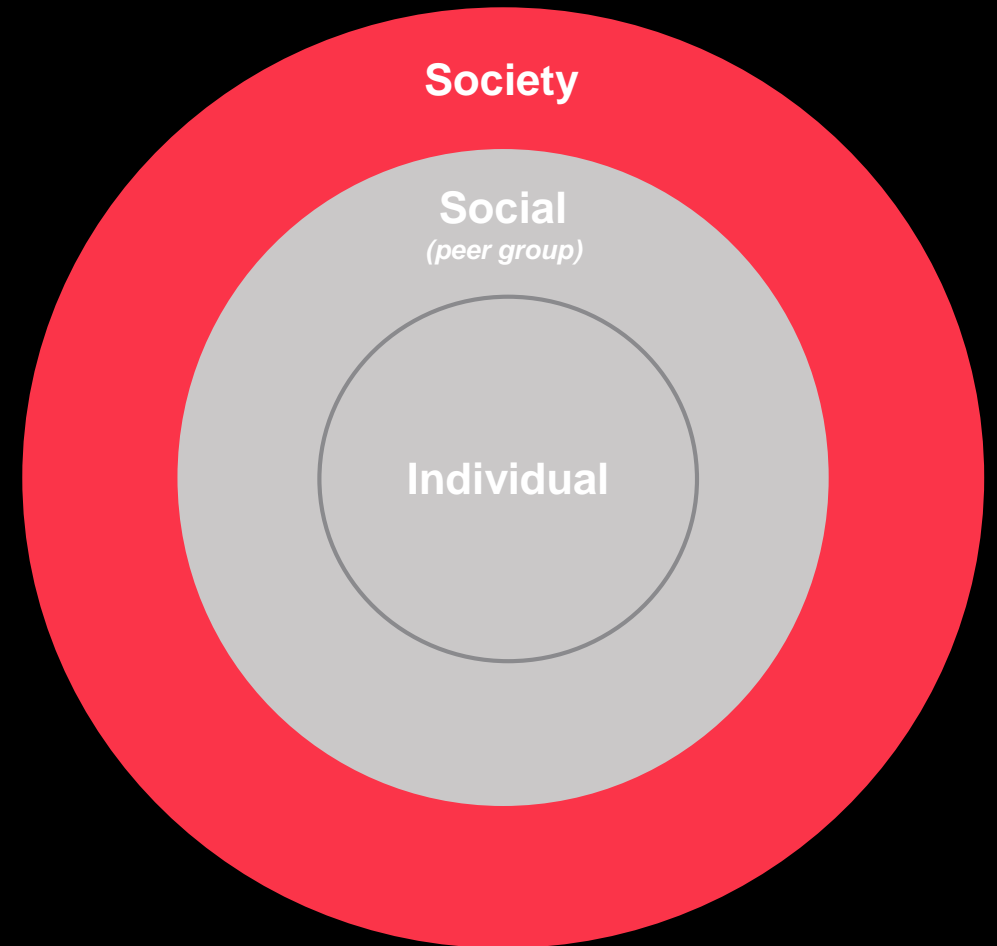
CINEMA PROVIDES CULTURAL MOMENTS

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

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

They wanted to be part of the conversation.

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



3.3M TICKETS

44% 16-34

66% LIGHT TV

16-34S ARE MOST RECEPTIVE TO CINEMA ADS

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

Gen Z
16-19 year olds



Gen Y
20-34 year olds



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

RESULTS

**Spontaneous
awareness**
+33% increase

**'wagamama is a
cool brand'**
+16% increase

**UK like-for-like
sales increased
by 12.2%**

**10.1% UK
outperformance
of the market
during this
quarter**

A full-page background image featuring Tom Cruise running towards the viewer. He is wearing a dark jacket and pants. In the background, the US Capitol building is visible, with its iconic dome and classical architecture. The entire image has a strong blue color cast.

LAND

CINEMA OCCUPIES A UNIQUE ROLE IN THE WORLD OF AV

Top 3 associations by platform

LIVE TV

Fill time	30%
Background viewing	26%
Comforting	18%

VOD

Binge viewing	27%
Fill time	25%
Quality content	19%

YOUTUBE

Fill time	43%
Helps me escape	28%
Binge viewing	27%

SOCIAL VIDEO

Fill time	38%
Low Attention	27%
Spontaneous	20%

CINEMA

Shared experience	37%
High attention	34%
Quality content	31%

CINEMA ADS HELP BRING THE VIEWER INTO A 'BUBBLE'



72% OF 16-34s AGREE
THAT "CINEMA IS A BUBBLE WHERE THE OUTSIDE
WORLD CAN'T INTRUDE"

66% OF 16-34s AGREE
THAT "I PAY MORE ATTENTION TO ADS IN CINEMA
THAN ELSEWHERE"

70% OF 16-34 'AD AVOIDERS' AGREE
THAT "I TALK TO THE PEOPLE I GO TO THE CINEMA
WITH ABOUT THE ADS (WHILST WATCHING THEM)"

A full-page background image featuring Tom Cruise running towards the viewer. He is wearing a dark jacket and pants. In the background, the US Capitol building is visible, with its iconic dome and classical architecture. The entire image has a blue color overlay.

IMPACT

BRANDS CAN BENEFIT FROM A TRANSFER OF POSITIVE ATTRIBUTES

PREMIUM

Cinema	48%
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TV	17%
----	-----

YouTube	16%
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Social Media	11%
--------------	-----

VOD	9%
-----	----

TRUSTWORTHY ADS

Cinema	36%
--------	-----

TV	31%
----	-----

YouTube	16%
---------	-----

Social Media	10%
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VOD	9%
-----	----

ADS MAKE YOU FEEL MORE POSITIVE TOWARDS A BRAND

Cinema	30%
--------	-----

TV	25%
----	-----

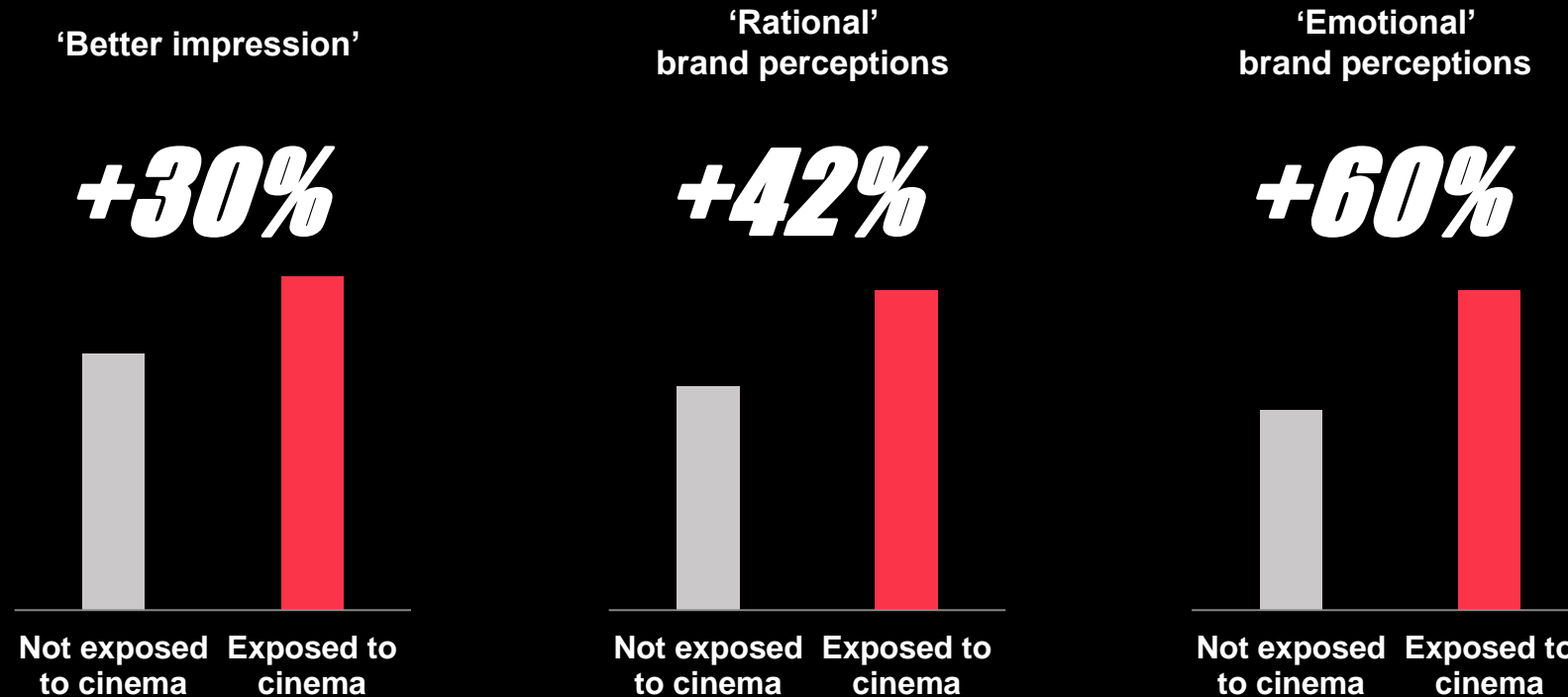
YouTube	20%
---------	-----

Social Media	17%
--------------	-----

VOD	8%
-----	----

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

Meta-analysis of 12 recent cinema campaigns
16-34 audience results



KEY FINDINGS

The unique cinema experience creates an **immersive, non-intrusive, 'bubble' of attention** that no other AV format can provide.

Brands can benefit from a **positive transfer of attributes** that cinema possesses including being seen as **premium and trusted**.

The immersive 'bubble' of cinema is also the perfect environment to land key messages –both **emotional & rational** – and creating a **better brand impression**.

REPOSITIONING

THE POWER OF CINEMA WITHIN AV

Sarah Dack, Head of Research and Insight

PIVOTAL COVER

QUALITY ENGAGED IMPACTS

**LAUNCH SPOTS
1+ IN WEEK REACH BUILD**

INDUSTRY GOLD STANDARD



TOP TEN 16-34 – 2018 FILM RELEASES

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



TOP 16-34 PROGRAMMES ITV1 2018

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

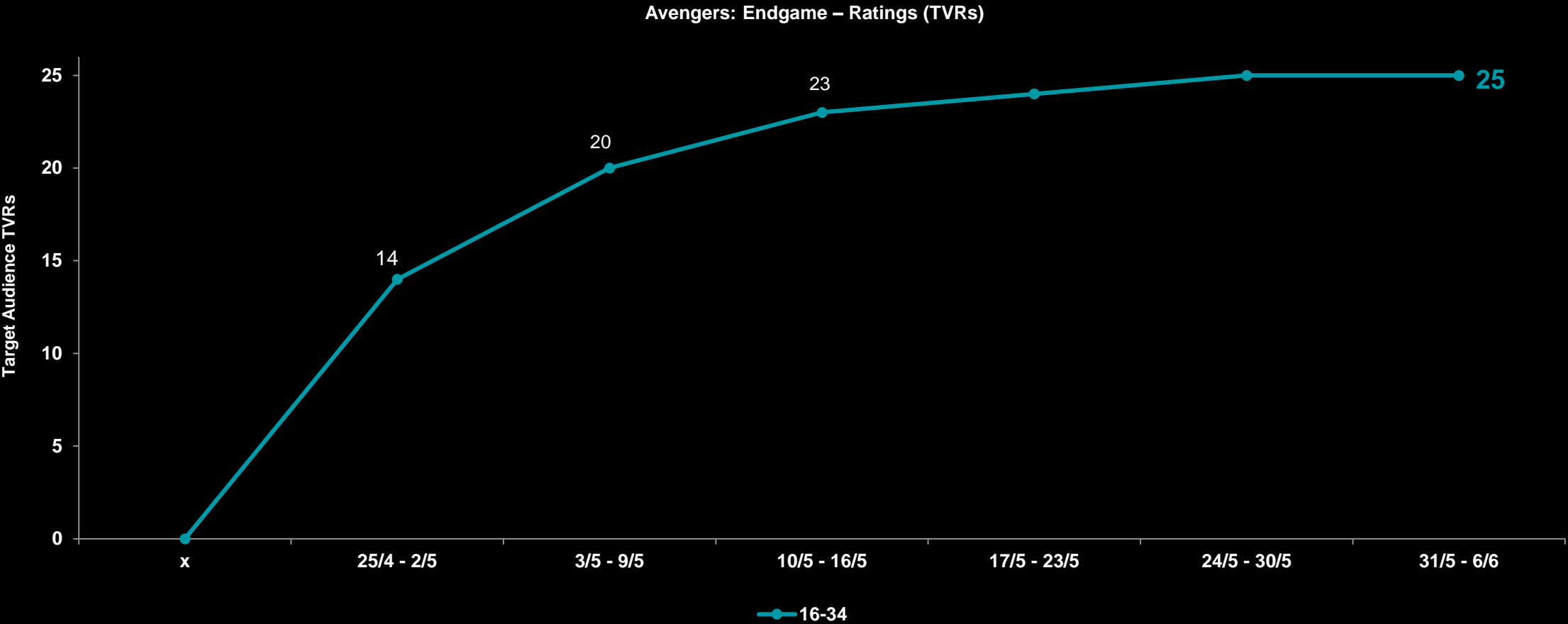
PREDICTED TOP TEN 16-34 FILM RELEASES: 2019

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



LAUNCH YOUR CAMPAIGN WITH AVENGERS: ENDGAME

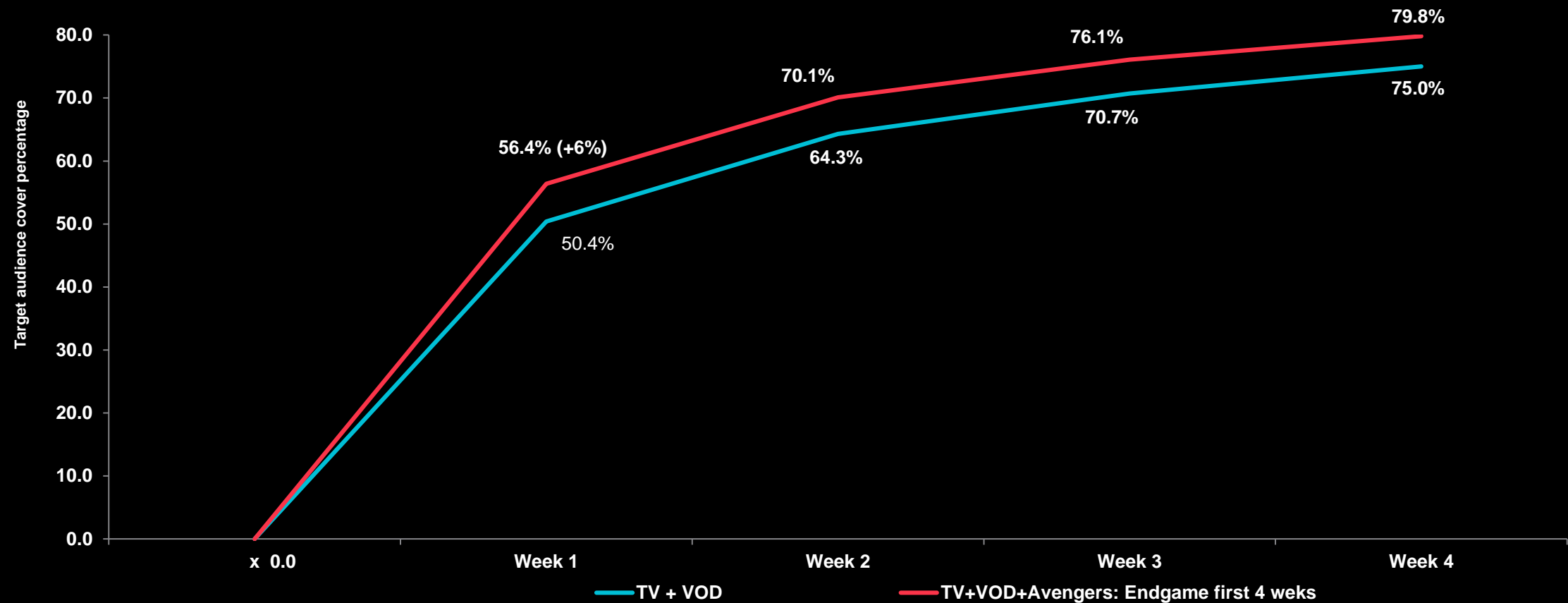
High reach, low frequency – Constantly reaching new people



MAJORITY OF THE AUDIENCE UNIQUE

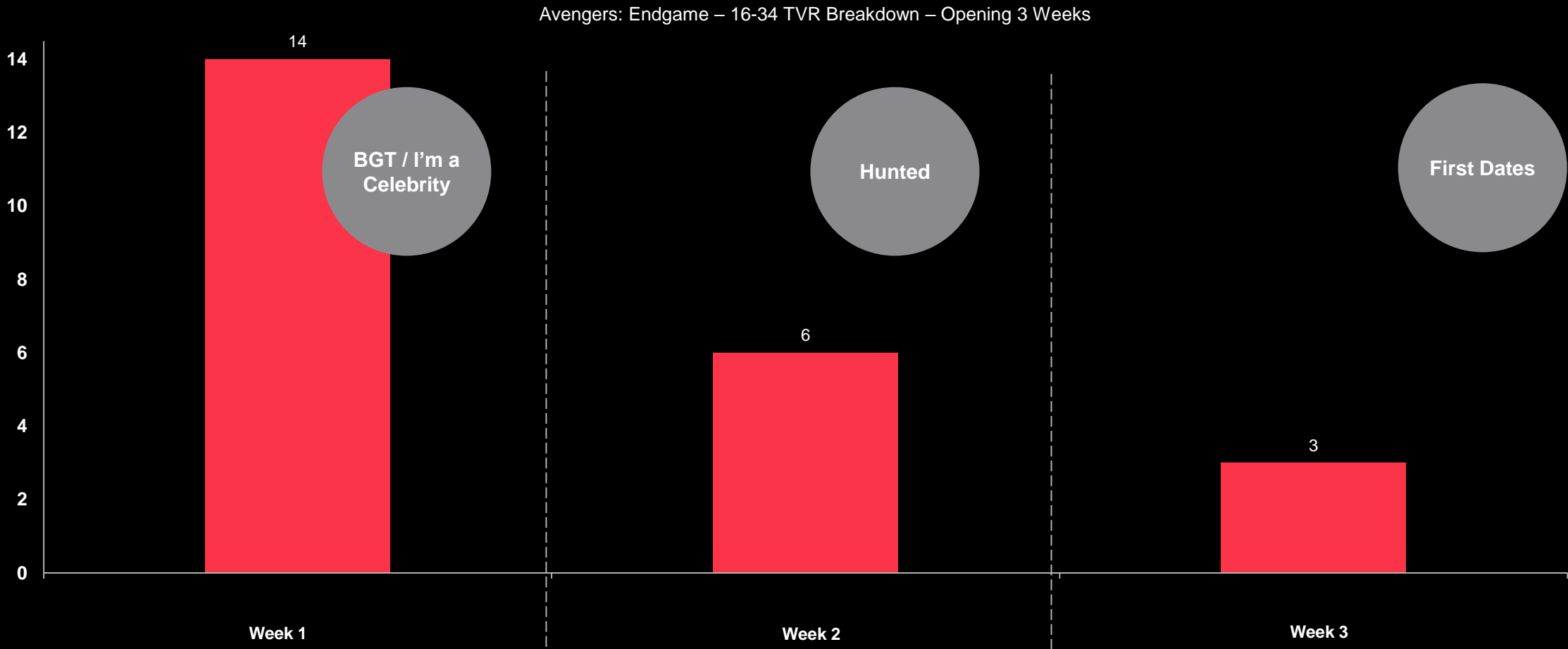
LAUNCH SPOTS BUILD PIVOTAL COVER

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

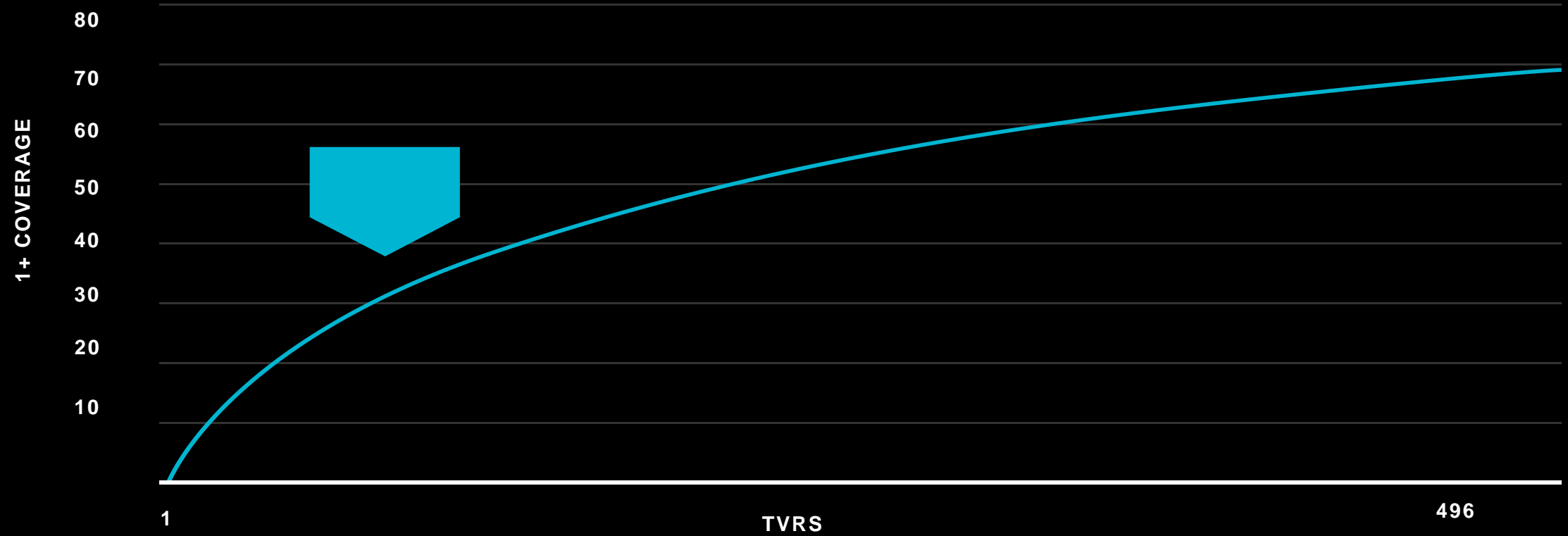


EACH WEEK EQUAL TO TV SPECIAL

A great addition to any AV plan targeting 16-34 adults



WHICH MEANS ITS ROLE IS HERE...



HOW TO BUY CINEMA

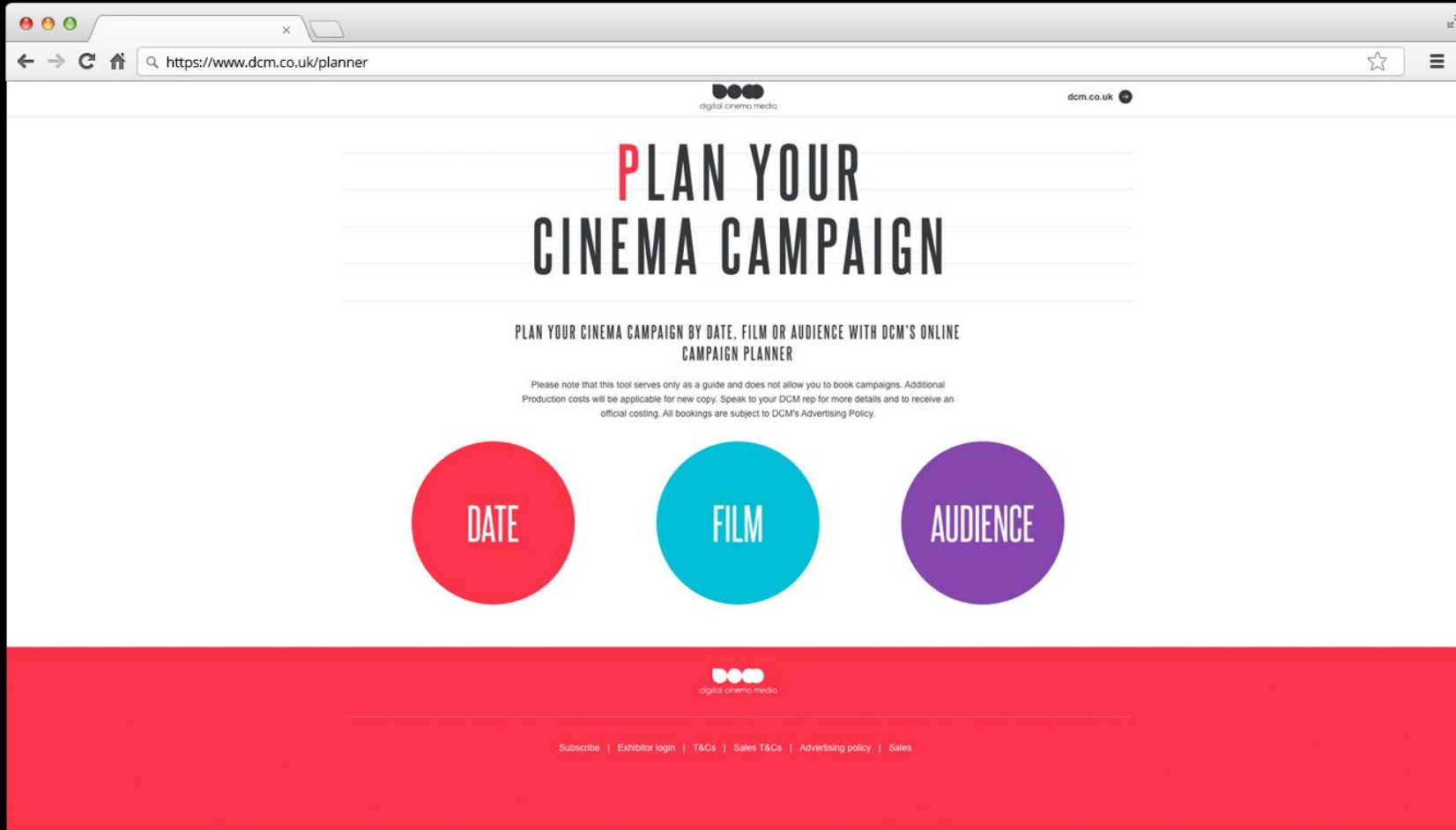
Emma Morrisroe, Agency Manager

**CINEMA IS A PREMIUM,
BRAND SAFE, TRUSTED
ENVIRONMENT**

ANOTHER AV CHANNEL



YOU CAN PLAN YOUR CINEMA CAMPAIGNS DYNAMICALLY



PRODUCTION

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



A dramatic low-angle shot looking up into a narrow, reddish-brown rock crevice. A person is seen from behind, crouching and reaching out with their right hand towards the opposite rock wall. The person is wearing a cap and a dark shirt. The background is a clear, bright blue sky. The overall mood is one of challenge and achievement.

**WE CAN GET YOU ON
THE BIG SCREEN
IN 72 HOURS**



MORE FLEXIBILITY WITH LATE MONEY

THE CINEMA PLAYLIST



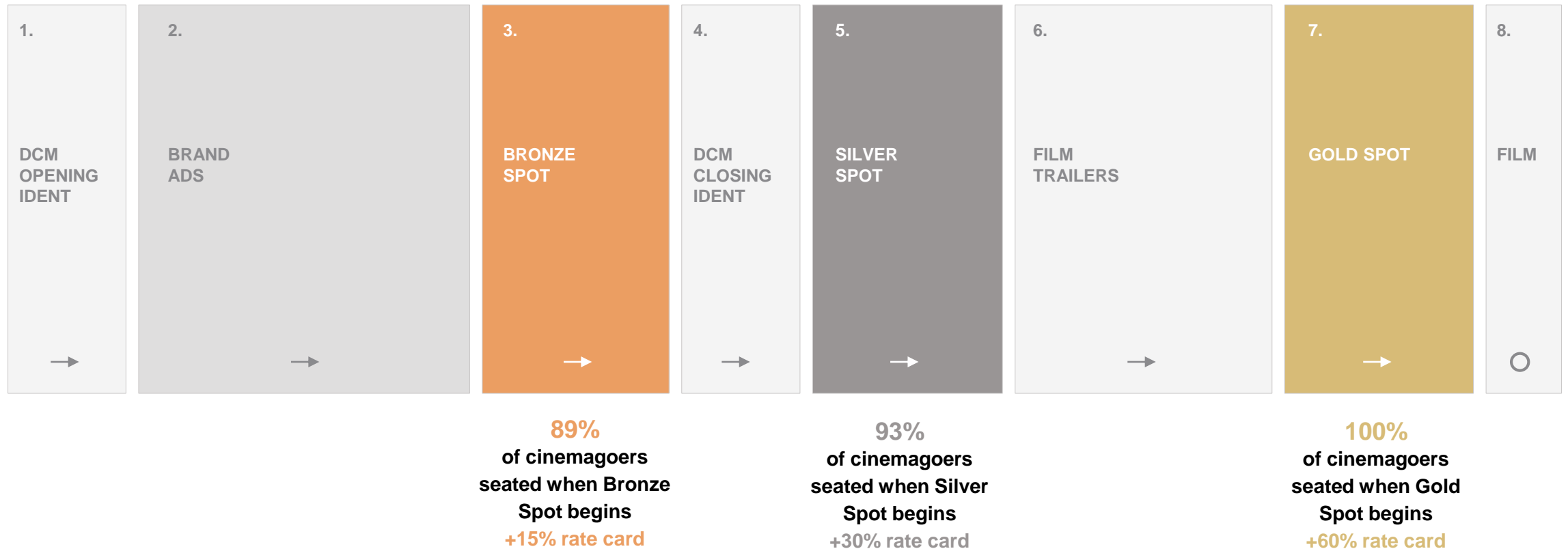
Average reel length: 11 minutes

**THE MOST PRESTIGIOUS
POSITIONS IN ADVERTISING
ARE AVAILABLE**

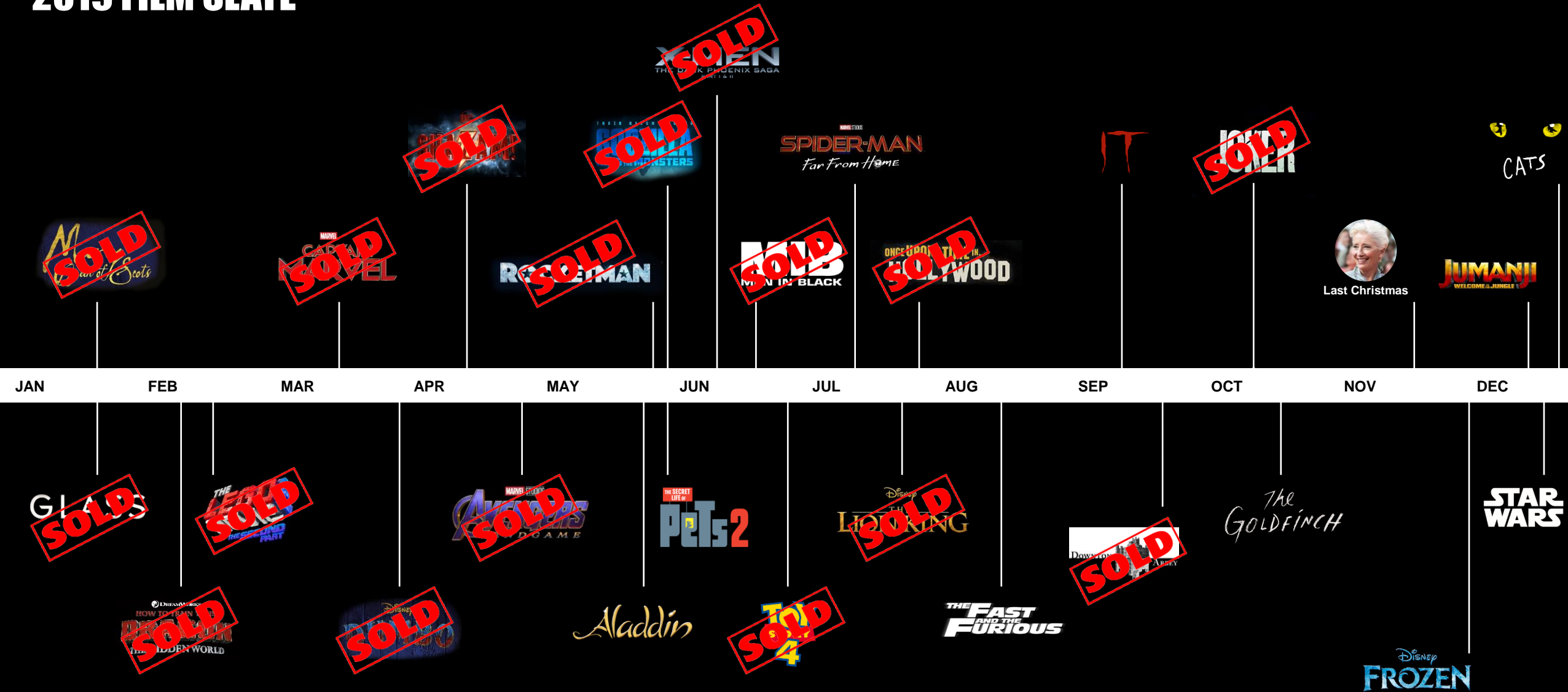
THE GOLD, SILVER & BRONZE SPOTS

Take advantage of the most prestigious positions in advertising

Have your ad sit side-by-side with the greatest content in media, and in front of the most engaged audience, at an appointment to view occasion. Give your creative the impactful spot it deserves.

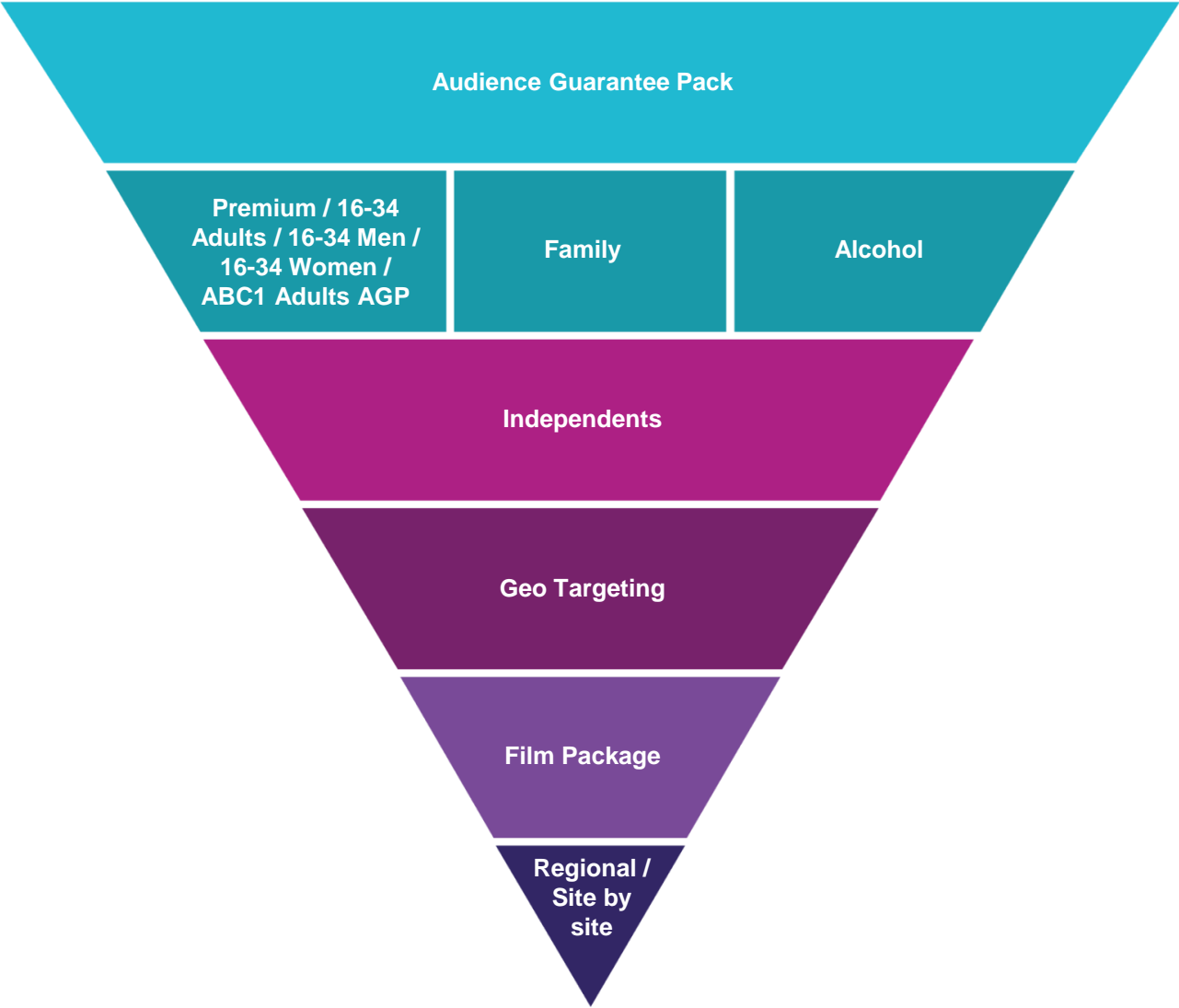


2019 FILM SLATE



**30" CREATIVE
ACCOUNTS FOR
50% OF CAMPAIGNS**

CINEMA BUYING ROUTES



AUDIENCE GUARANTEE PACK (AGP)

Cinema's most popular buying route.

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

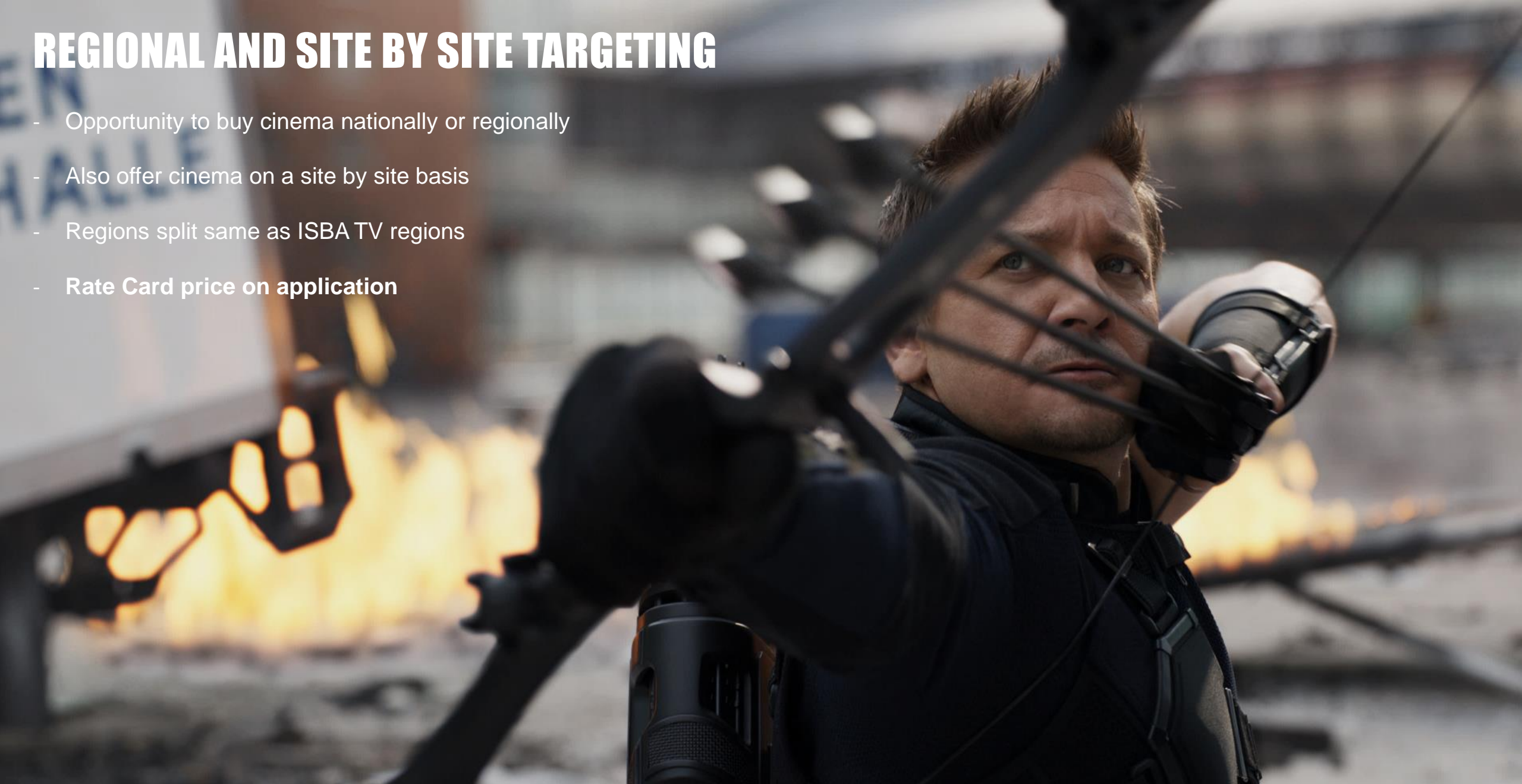
ALCOHOL/GAMBLING AGP

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

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

REGIONAL AND SITE BY SITE TARGETING

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



GEO-TARGETING PACK

Using Cinemapper, DCM's cinema proximity planning tool, you can run national campaigns with a local spin for every region, city, town or cinema across the UK via local end frame messaging.



FAMILY PACK

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

- Releases fall in school holidays
- 30" Ratecard CPT: £34



FILM PACK

Film packages allow you to select individual films that profile well against your target audience and engage cinemagoers.

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



WHY YOU CAN TRUST CINEMA

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

1. INFORMED FORECASTS

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

2. DAILY UPDATES

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

3. TICKET SALES REPORTED

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

4. ACCOUNTABLE REPORTING

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

5. INDEPENDENT CORROBORATION

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

SUMMARY



Premium spots



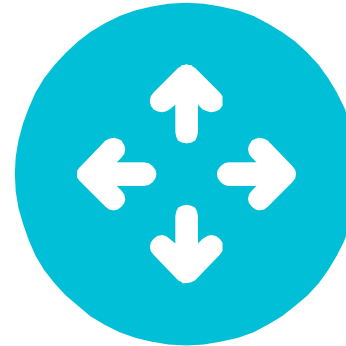
7 days lead time



Flexible late cash



Audience targeting



Accountable tracking



Brand safe



HEADS SHOULDERS TAILS

Elza Luksa, Agency Manager

WHO IS DCM OWNED BY?

HEADS
SHOULDERS
TAILS

ODEON & VUE
ODEON & CINEWORLD
CINEWORLD & VUE

SHOULDERS

ODEON
FANATICAL ABOUT FILM

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

HOW MANY INDUSTRY CINEMA ADMISSIONS WERE THERE IN 2018?

HEADS	171m
SHOULDERS	175m
TAILS	177m

TAILS

177M

Q3

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

**HEADS
SHOULDERS
TAILS**

**ODEON
CINEWORLD
PICTUREHOUSE**

SHOULDERS



WHAT PERCENTAGE OF THE CINEMA AUDIENCE IN THE UK IS 16-34s?

HEADS	44%
SHOULDERS	34%
TAILS	30%

HEADS

44%

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

**HEADS
SHOULDERS
TAILS**

11 TVRs
19 TVRs
15 TVRs

SHOULDERS

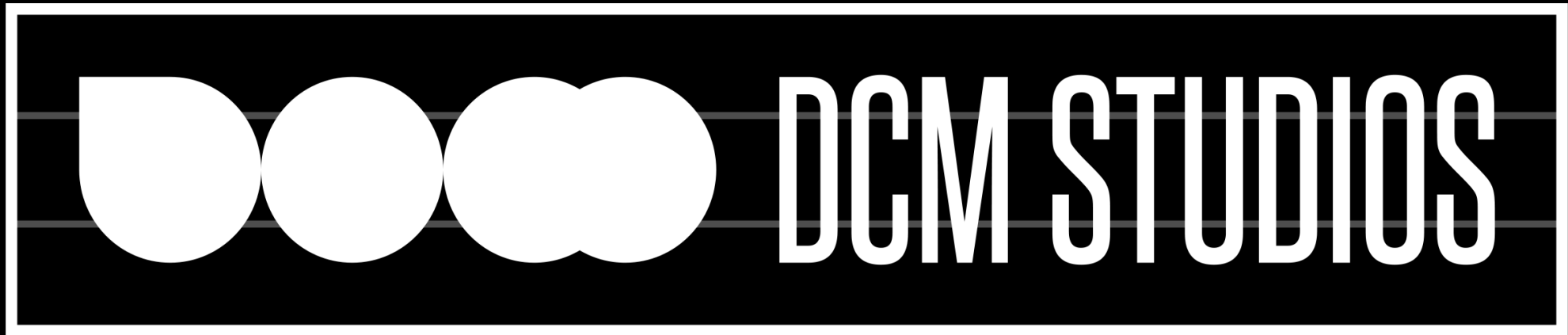
19 TVRS

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

HEADS	200.8m
SHOULDERS	177.1m
TAILS	224.6m

TAILS

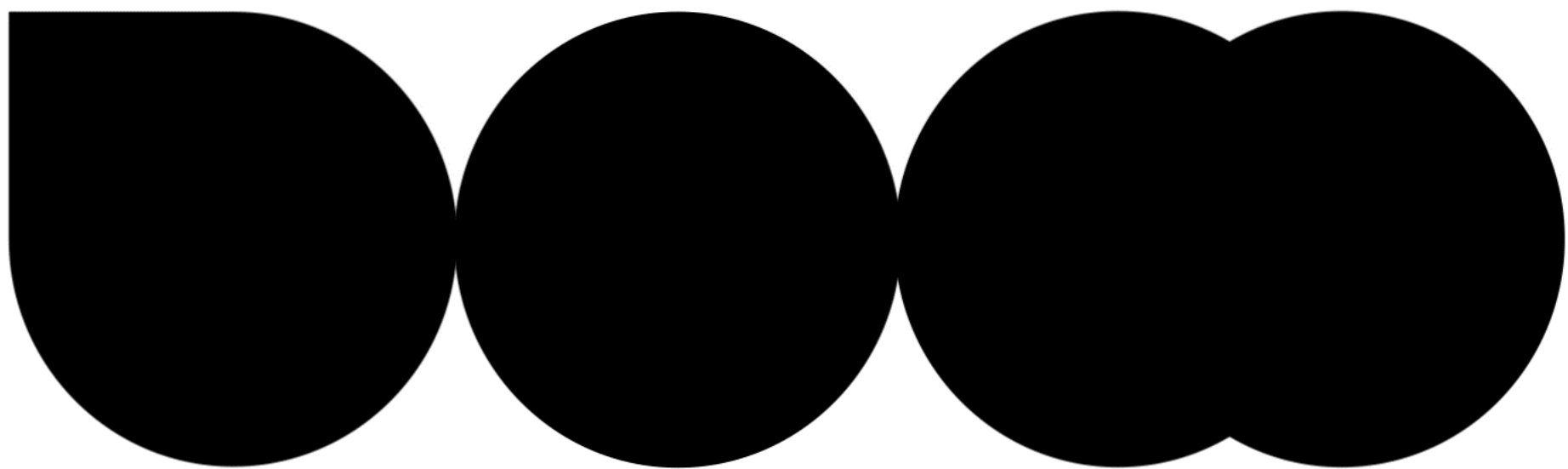
224.6m



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

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





DCM STUDIOS - CONTENT, EXPERIENCES, PARTNERSHIPS



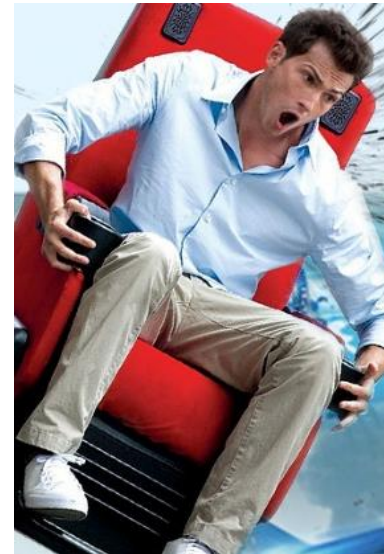
Film slate



Film partnerships



Content creation



Technology



Events & experiences



Sponsorships

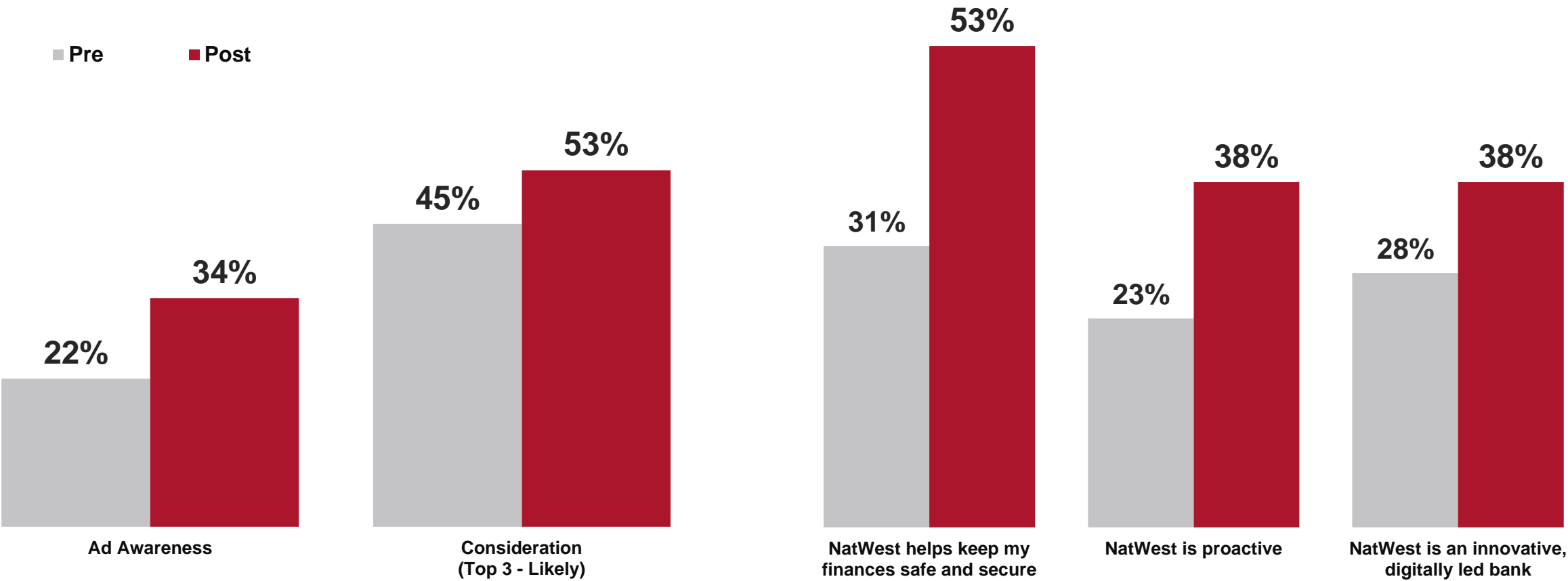
CONTENT

NATWEST

*Oceans 8, Mission Impossible:
Fall Out & First Man*



'Safety and Security' - 2018



COUNTER TERRORISM

CAM 075

REC

000039



000039



ITV REPORT 23 January 2019 at 6:00am

Real life foiled plots in new counter terrorism film



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

The film highlights the importance of communities in the UK's fight against terrorism.



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

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

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

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



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

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



Assistant Commissioner Neil Basu says the public's help has been vital

The assistant commissioner said the authorities know where some of the British foreign fighters are overseas, but others they don't.

Mr Basu said he was "incredibly grateful" that 2018 was spared the level of carnage of the previous year, when dozens of people were killed in attacks in London and Manchester.

However, he warned the "worst-case scenario" was public complacency.

Mirror

EveningStandard.

BBC
RADIO



LIDL



MAX FACTOR

*Murder On The Orient Express
& The Greatest Showman*



MAX FACTOR EVENTS



Creating For

TECHNOLOGY

BIGGER SCREENS...

Captive Audience

Longer Creative

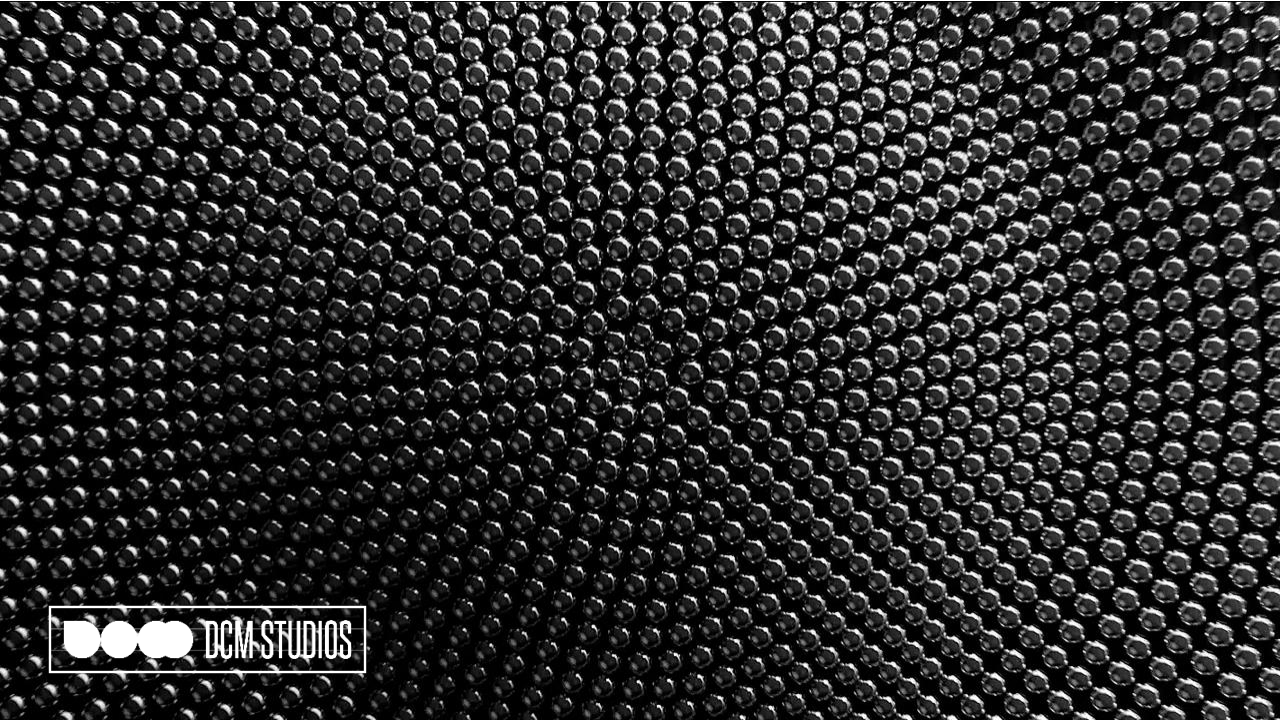
4K



...TRUER SOUND

Make it part of the creative

Dolby Atmos





I'm in the movie

4DX

SCREEN X



Dive into the Movie!



**YOUR TURN TO
CHALLENGE US**



THE LIVE BRIEF

Bruno McKay, Agency Manager

WHAT YOU NEED TO DO

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

THE LIVE BRIEF

PRODUCT: A fragrance

CAMPAIGN DATES: Launch in June 2019 (30%), with support through key retail periods, e.g. Black Friday, Christmas, etc (70%)

TARGET AUDIENCE: 16-34 Women

Objectives:

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

Considerations:

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



WHAT YOU NEED TO DO

- Hand your response to a DCM member of staff at the end of the break
- Your ideas will be judged during the rest of the presentation, and the winning team will be announced at the end of the course
- Each winning member will win a luxury cinema goody bag



**SEE YOU BACK
HERE IN 45 MINS**



2019: A YEAR IN FILM

Summer Baxter, Agency Executive &
Chris Rogers, Agency Assistant

16-34 FILMS

Delivering over 100 16-34 TVRs



Avengers: Endgame

25 April



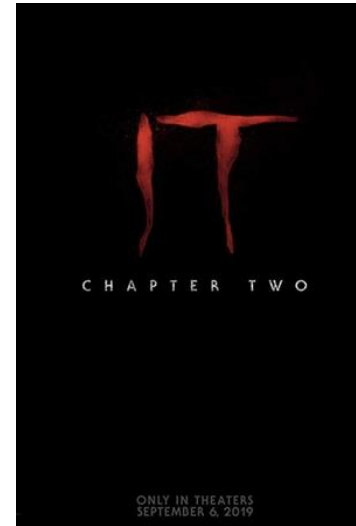
Toy Story 4

21 June



The Lion King

19 July



It Chapter 2

6 September



Frozen II

22 November



Star Wars: Episode IX

19 December

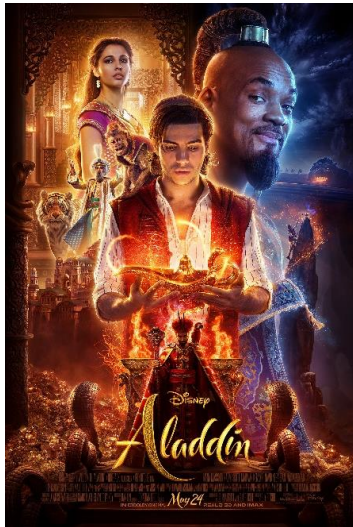
FEMALE 16-34 FILMS

A huge variety from horror to action to romance



The Hustle

10 May



Aladdin

22 May



Annabelle Comes Home

28 June



Maleficent: Mistress Of Evil

18 October



Charlie's Angels

15 November



Last Christmas

15 November

MALE 16-34 FILMS

A blockbuster selection of content



John Wick: Chapter Three – Parabellum

17 May



Men in Black International

14 June



Spider-Man: Far From Home

3 July



Fast & Furious: Hobbs & Shaw

2 August



Once Upon a Time in Hollywood

14 August



Joker

4 October

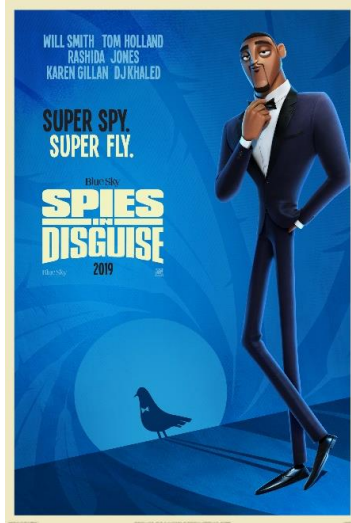
HIDDEN GEMS

Quality films flying under the radar



Blinded By the Light

9 August



Spies In Disguise

9 August



Gemini Man

11 October



The Aeronauts

1 November



Ford Vs Ferrari

15 November



Knives Out

27 November

UPMARKET FILMS

The best way to reach a premium ABC1 audience



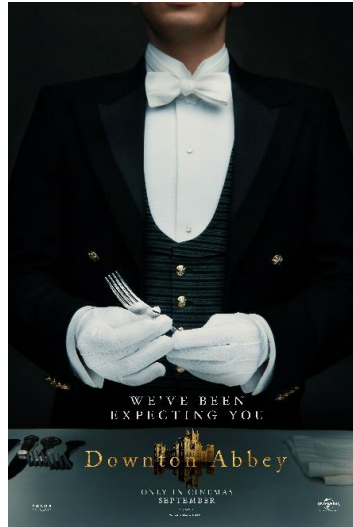
Rocketman

22 May



Yesterday

28 June



Downton Abbey

13 September



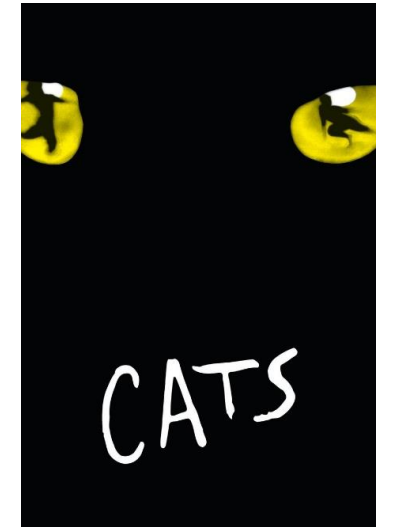
The Woman in the Window

27 September



The Goldfinch

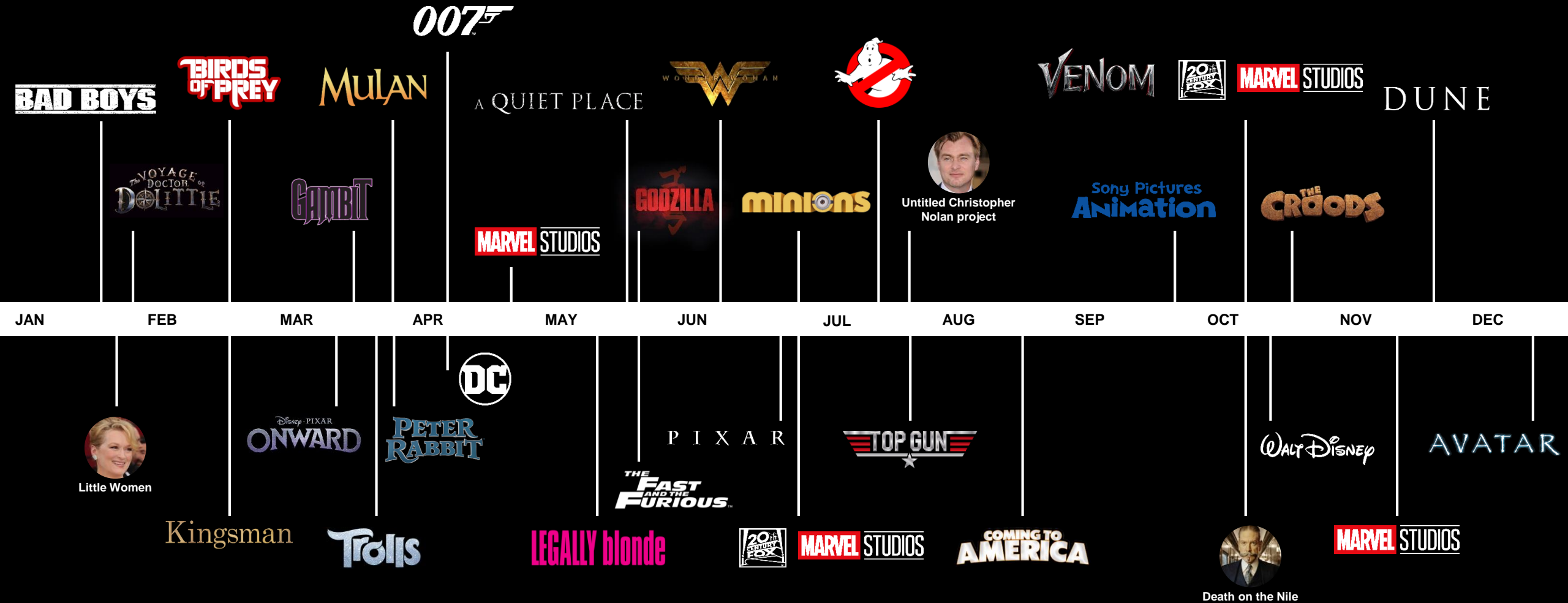
11 October



Cats

20 December

2020 FILM SLATE



THANK YOU!