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BIG BRANDS. BIG IDEAS. BIG IMPACT.

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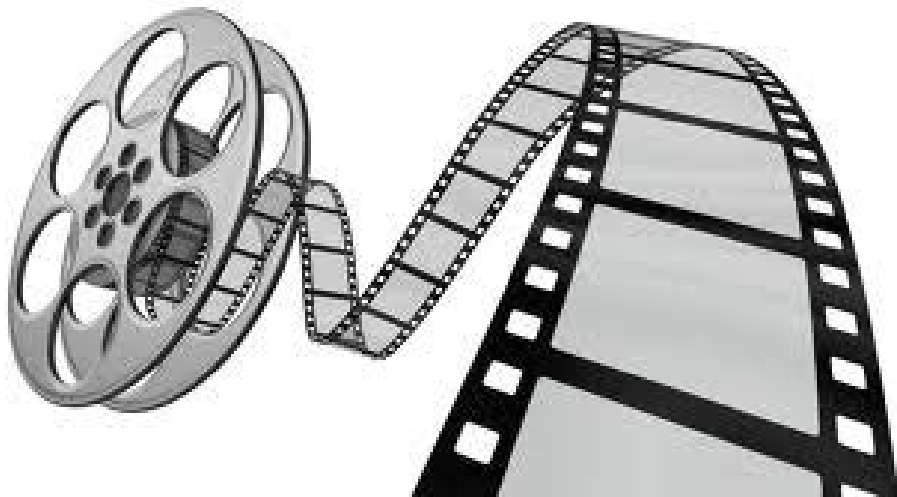
March 2014

Cinema Advertising

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- Background & Objectives
- Methodology
- Results snapshot
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# Background

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- Cinemark has been selling the value of cinema advertising to marketers since 1971. Key motivations provided to clients have focused around the experience in cinema. Attention is focused and the viewing experience is more intense. This ensures a more memorable, amplified experience versus other mediums
- Cinemark would like to base these arguments in sound research data which highlights the unique proposition cinema offers for advertisers
- The remainder of the report highlights the research conducted to meet this end goal

**The overall Business Objective is to establish evidence supporting the effectiveness of including cinema advertising into the advertising mix**



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## Research method:

Mixed methodology using quantitative and qualitative survey questions



## Data Collection:

Ster-Kinekor's MovieMinds online insight community over the period 26<sup>th</sup> February to 10<sup>th</sup> March 2014



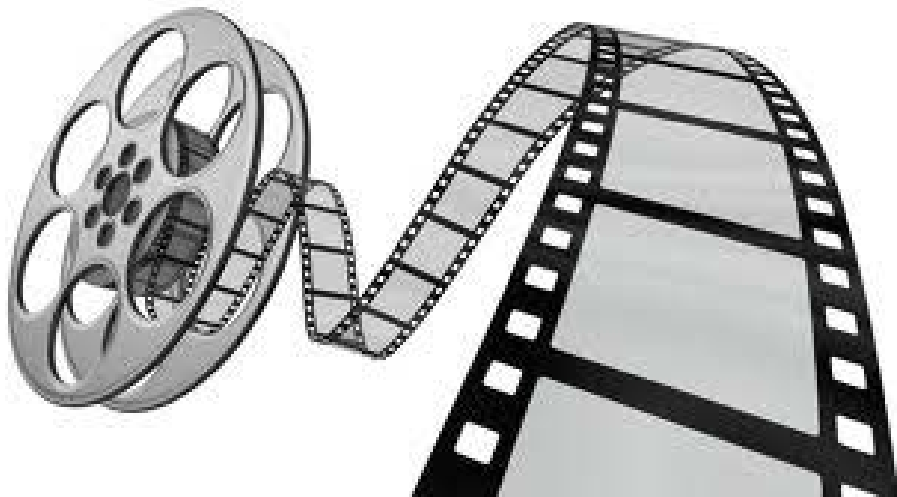
## Geographic Scope:

National Metropolitan South Africa

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# Are cinema ads avoided?

# NO

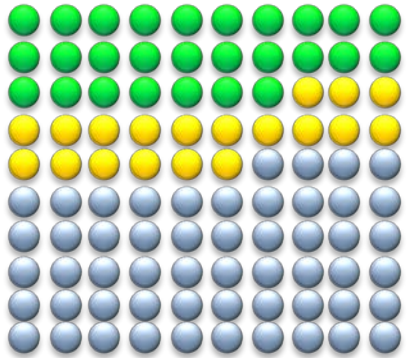
Only 3% of the cinema goers interviewed will intentionally arrive after the ads are finished



*TV ads are effective, but also easily avoided. TV ad breaks are synonymous with toilet runs, snack missions, Facebook updates and telephone calls. Never mind the remote control and its abilities to find alternatives to ads.....*



# Are cinema ads enjoyed?



Only 16% dislike cinema ads



Particularly enjoyed by:  
Youth, LSM 6-7, Black

73% enjoy cinema ads

27% of those thoroughly enjoy cinema ads

Cinema ads are enjoyed more than any other form of advertising. Only TV comes a close second.

WHY?

**WOW** factor – big sound, big screen

Not interrupting a programme

Has intent focus / no distractions

Less repetitive

Captivating





# How much attention is paid to cinema ads?



Cinema grabs 1<sup>st</sup> place for holding more attention than ads in any other media

*Why more attention?*  
*Fewer distractions*  
*Part of the entertainment*  
*Different ads*



Cinema = 72% attention  
TV = 60% attention  
All the rest = < 50%

## Did they act on it?

**YES!**

46% had bought or investigated a product / service directly as a result of a cinema ad

*Who listened most?*  
*Youth, LSM 6-7, Black*

# Do cinema ads influence behaviour?



TV ranked slightly higher in ranking of influential ads

Even though exposure to cinema ads are ranked lower than TV in terms of influence, cinema is still ranked 2<sup>nd</sup> - above all other formats.

**BUT**

A large part of TV ads impact is due to repetition. Can be effective, but does encourage avoidance (channel hopping, leave the room, alter focus). Can also cause irritation and resentment which is transferred to the marketed product.

**BUT**

If an ad is viewed on BOTH TV and cinema

**Result:**

A mere 7% rate the TV version as more effective  
**49% think cinema would be more effective**  
35% think they would be equally effective

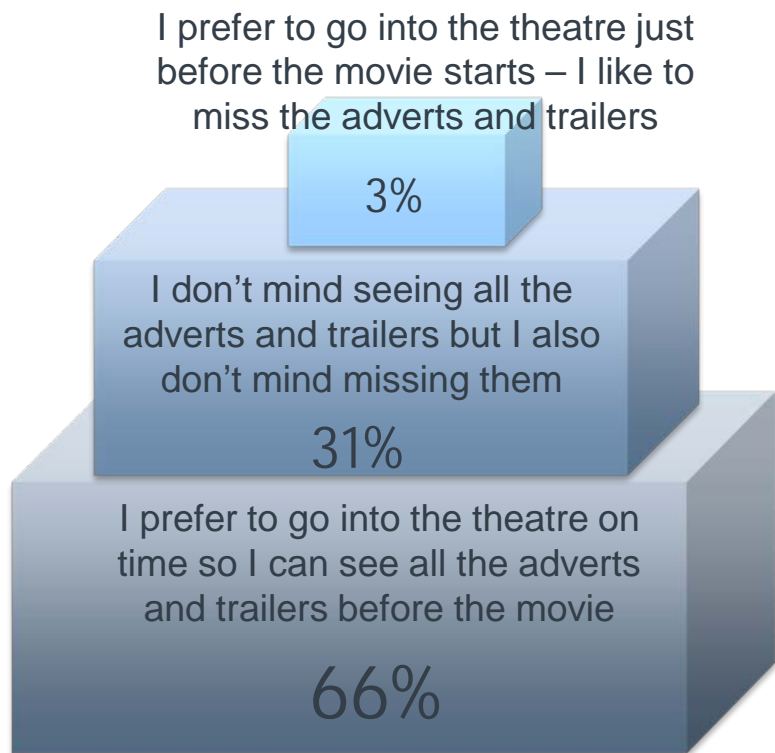
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Two-thirds of cinema goers ensure they are seated in time to watch all aspects, including the ads. In reality, some do arrive later and did miss all or some ads, but most saw the ads in at least three of the last five occasions

## Cinema behaviour

Which of the following best describes your behaviour when going to watch movies at the cinema?



If you think back to the last five movies you have seen at the cinema, estimate on how many of these occasions you have watched all or most of the ads before the movie?

No. of movies where all or most ads seen



Represents 5%

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There are some who would prefer to arrive as the movie starts, but the consensus is that the ads and trailers are part and parcel of the whole experience. There are some aspects which make the ads more enjoyable – different to TV, humour, big screen presence – but overall, most sit and lap up the ads with whole-hearted concentration

## Spontaneous comments

Is there anything you would like to say or tell us about cinema advertising?

n=684

Humorous ads gain lots of attention

“A lot of people complain about the ads, but I really enjoy it and seeing the products on the big screen really is part of the experience for me.”

“Ads need to be funny and entertaining, that’s what the night or day to the movies are about.”

“Cinema advertising forces people to watch the adverts and so should make a great impact. Advertisers that make use of this and the wonderful surround sound and beautiful colour may make the adverts most effective.”

“Ads are better and more graphic on the big screen “cinema”.”

“Adverts that are shown in bigger screens like cinema draw more attention and there is less distraction cos the screen is too wide and you won’t miss anything.”

“Capitalize on the difference between cinema and regular TV’s. Make the most of the immersive cinema experience (especially factors such as Dolby surround, and 3D).”

Not the same ads as on TV – bigger, louder and more epic

“Cinema advertising is exciting and is supposed to be upbeat and put people in a good mood.”

Sad or worrying gets some attention, but upbeat works best

“Generally Cinema ads are exciting and great to watch. I would never cut them out as they form part of the movie experience.”

Make it part of the movie-going experience – drama, excitement, humour

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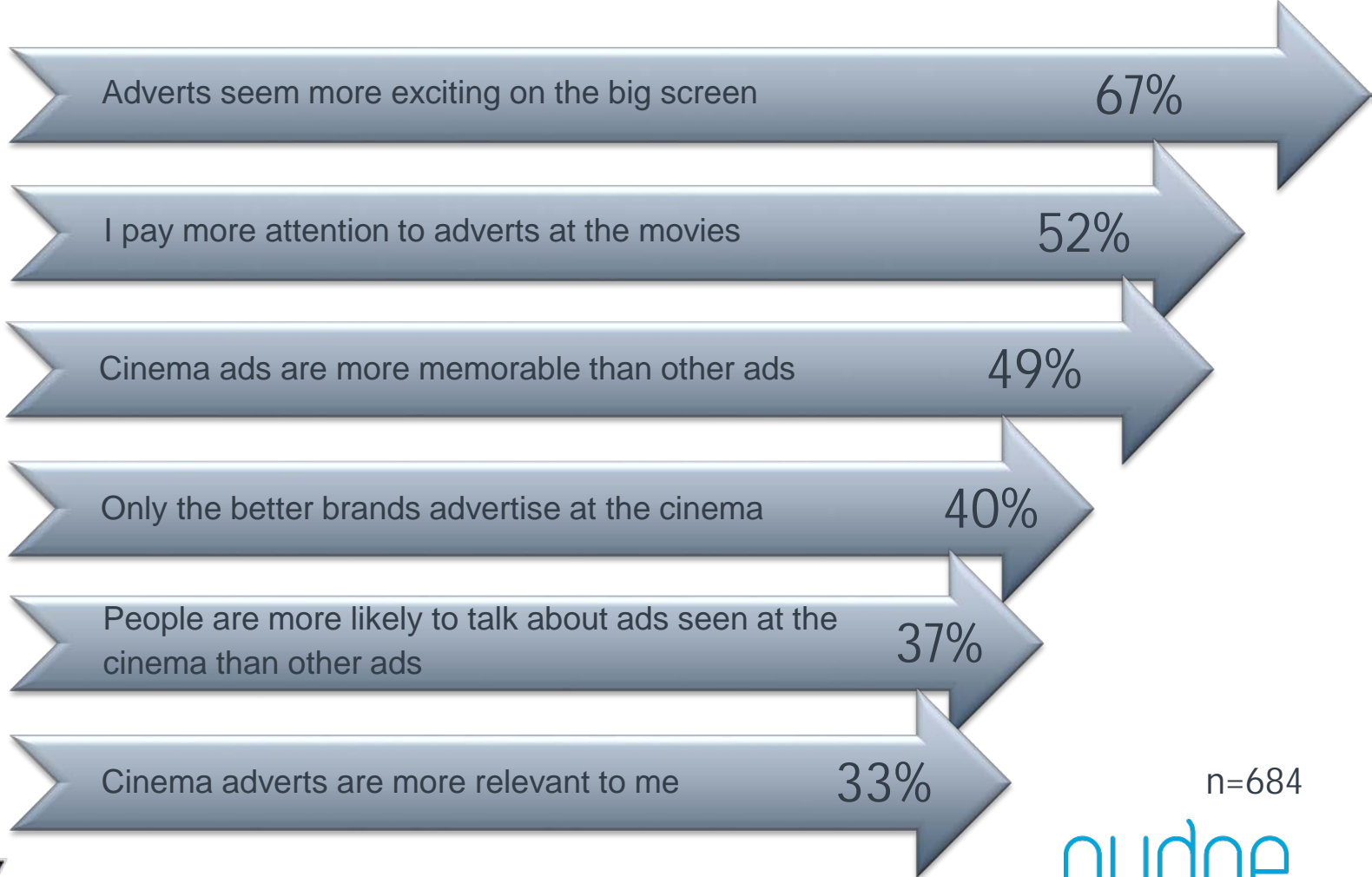
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The drama of the big screen is perceived to benefit not only movies but the ads at the cinema as well and cinema goers agree that they do pay more attention to ads in this format than on other media. Adding in the fact that they are more memorable and the benefit of cinema advertising is undisputable

## Attributes

Here are some comments that people have made about cinema ads. To what extent do you agree with these comments? Top2Box %



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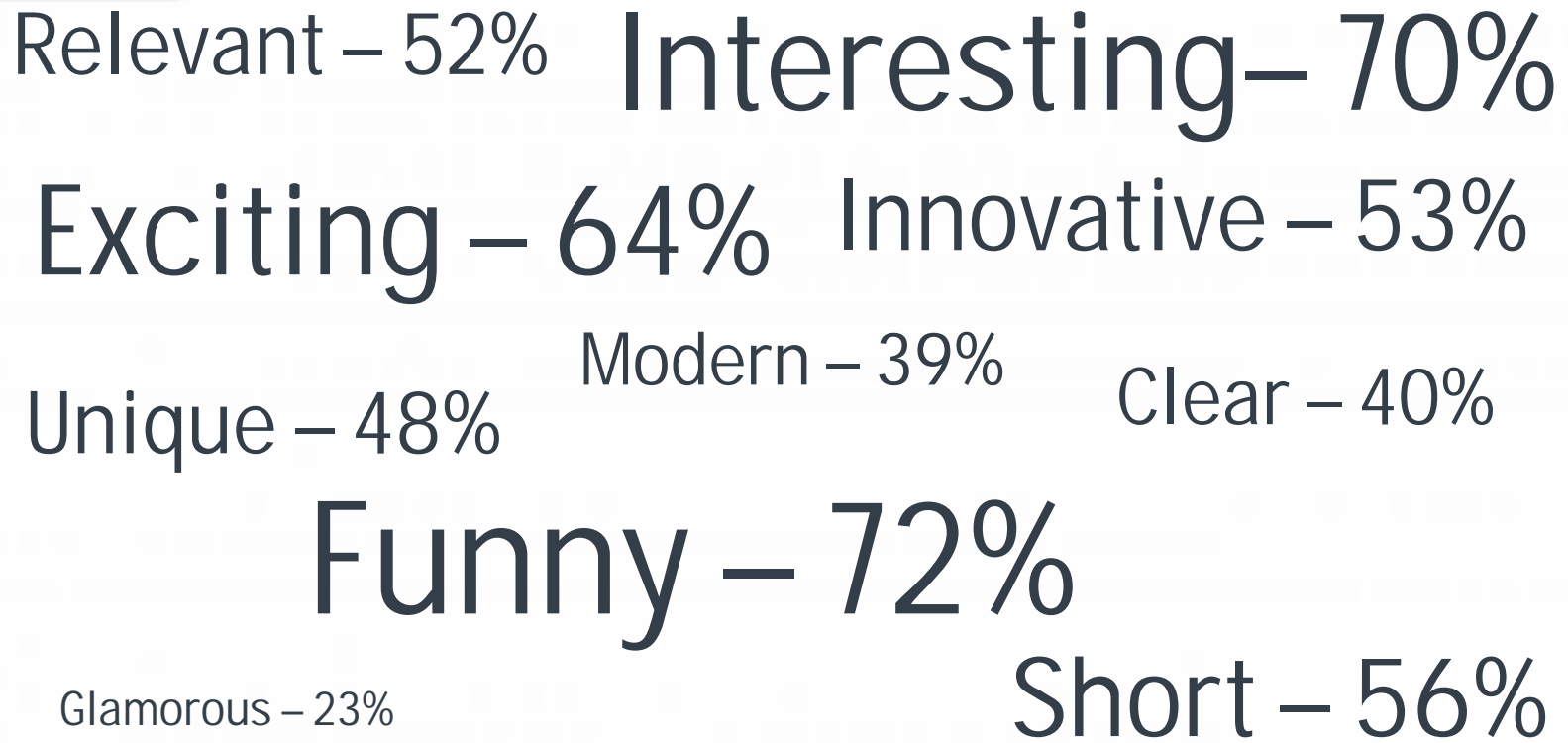


The importance of humour in cinema advertising is undisputable. However, this has to be done cleverly in order to also include the other desirable elements such as being interesting, exciting and relevant

## Cinema Ad Elements

Which of the following elements do you find important in a cinema advert?

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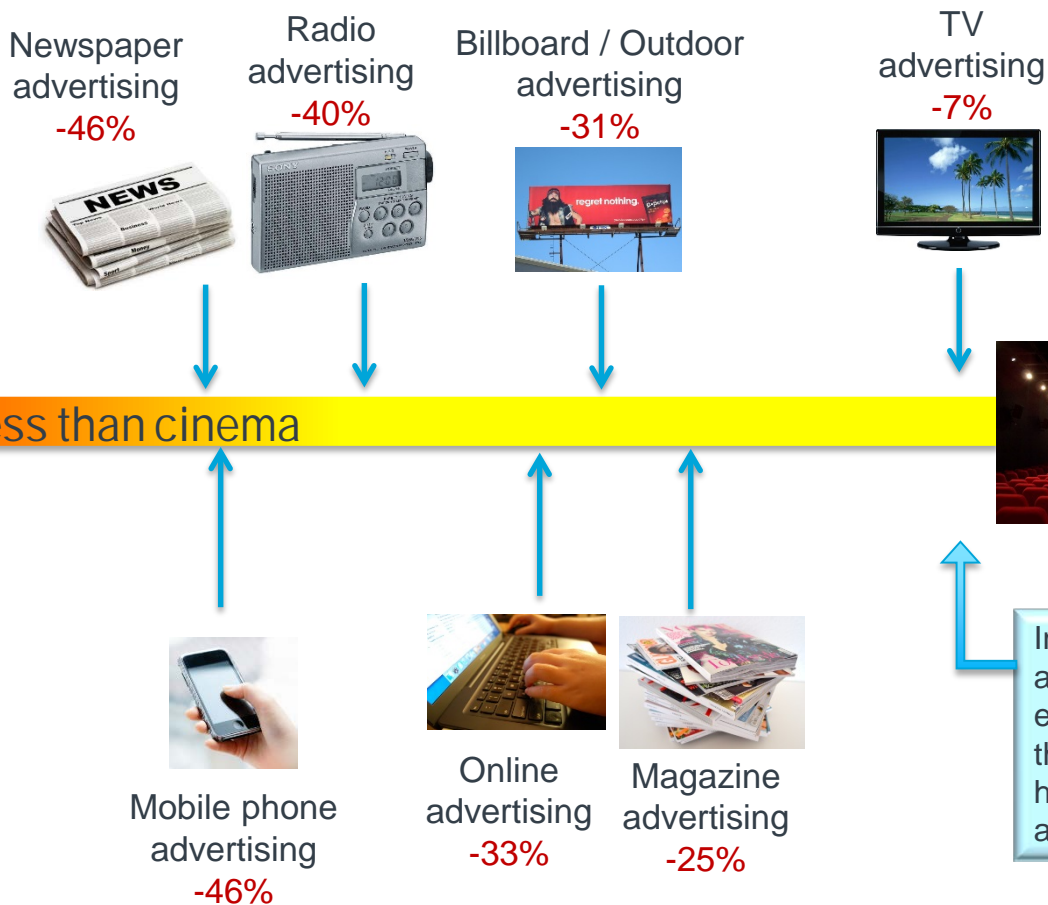




When it comes to enjoyment, ads on other media lag behind cinema ads. TV was fairly competitive with cinema as a format, but newspaper, radio and mobile phone ads lagged behind considerably

## Relative Enjoyment

How would you rate your experience of cinema advertising relative to other forms of advertising?



Note: There were NO forms of media that were liked more than cinema overall

Interestingly, the lower LSMs are considerably less likely to enjoy TV ads and are therefore likely to channel hop / leave the room during ads



The sheer amount of TV ads, their repetitive screening and their often less exciting message / product clearly impact on enjoyment for many, whereas cinema can cash in on its superiority in size and sound, as well as the fact that it provides a captive audience

Lack of TV Enjoyment:  
Main Themes

Why do you enjoy TV adverts LESS than cinema adverts?

25% enjoy TV ads less than cinema ads

Big screen,  
Big sound

Too frequent /  
too many ads

TV ads interrupt  
my programme

Too repetitive

TV ads tend to be  
ordinary

Less distractions  
at cinema

Cinema ads are  
more captivating

TV ads are  
irrelevant to me

TV ads are of lesser  
quality

n=175



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The cinema lends the same 'wow' factor to movies and adverts on its screens

## Big screen, Big Sound verbatims



*"They don't have the umphhh (attraction) as the ad on Cinema."*

*"They don't grab my attention - the sound quality and picture size is not as good as on the big screen."*

*"Smaller screen it disrupts what I am watching... They look boring and the quality is terrible."*

*"Because TV is too small and its surroundings is not the same as cinema."*



Why do you enjoy TV adverts LESS than cinema adverts? n=175

25% enjoy TV ads less than cinema ads

## Big screen, Big sound

Big sound and big screen equates to big impact. Cinema ads were seen as using these to great advantage to show off the product more effectively.



*"There is no wow factor like the BIG SCREEN has."*



*"For some or other reason it just doesn't capture my imagination as the cinema would, there's some 'X' element while seeing an ad in the cinema."*

*"The large screen and good sound at the cinema makes anything exciting."*

*"It's always better on a big-screen."*

Many complained about the almost constant interruption from ads on TV which ended with them feeling resentful to the ads and their products

Too frequent / too many ads verbatims

Why do you enjoy TV adverts LESS than cinema adverts? n=175

25% enjoy TV ads less than cinema ads

*“On cinema they only run for 15 min then its over. On TV every 15 min there is an advertisement about MAQ.”*

## Too frequent / too many ads

*“It comes up too frequently and spoils the TV watching experience.”*

Watching 15 minutes of ads at the cinema was acceptable to many, but having more ads constantly being played was very irritating to many, who generally resort to channel hopping to escape the ads.

*“They are more frequent than cinema adverts. In the cinema they get their 10 minutes then after that you enjoy your movie, TV on the other hand has constant adverts on every single channel from channel 100 (which basically is an advert on loop) all the way to 500.”*

*“Its annoying and takes more time than the programme I'm watching.”*

*“... there are just too many, and too many that aren't very good.”*

*“I fast forward and takes too long.”*



*“Because its nothing I'm interested in and there are too many of them on TV.”*

A short burst of ads – BEFORE the entertainment starts – was definitely preferred to a constant stream of interruptions throughout their viewing experience

## TV ads interrupt verbatims

Why do you enjoy TV adverts LESS than cinema adverts? n=175

25% enjoy TV ads less than cinema ads

## TV ads interrupt my programme

*"I don't enjoy them especially when they disrupt my attention."*

*"They interrupt what I am watching.. Movie adverts don't.. If I recorded it on my PVR, I'll skip through it."*

*"Cinema makes you feel part of what you watching . TV adverts are more interruptive than entertaining."*

*"There is nothing worse than watching a movie with a advert in the middle of the good part its a movie, not a series nor soap."*

*"TV ads cut into the program I'm watching and wastes time, therefore seeing all the ads before the film/program starts is better."*

A set of ads prior to the movie was given the okay – but constant interruption of a TV programme or sports event was high up on the irritation scale.



*"Because the timing of TV adverts is normally all wrong (especially if they occur during live events)."*

*"I "zone out" during TV ads, or quickly get up to do something before the show continues. I think they interrupt the shows of what I really want to watch and can waste time."*

*"They interrupt programs and sometimes movies. And I hate that."*

Viewers tend to 'switch off', change channel or leave the room to do something else to avoid ads they have seen numerous times already

Too repetitive  
verbatim

Why do you enjoy TV adverts LESS than cinema adverts? n=175

25% enjoy TV ads less than cinema ads

*"Too much of something is not good, you see the same ad on TV many times a day, which after time it will get boring which is a different story from the Cinema."*

*"They are boring and generally the same thing over and over again, Cinema adverts are different and exciting."*

*"We see them all the time, don't want to see them again."*

*"The same TV adverts are played way to much, they start to get annoying."*

## Too repetitive

Too much exposure to an ad can make even a good ad seem bad...

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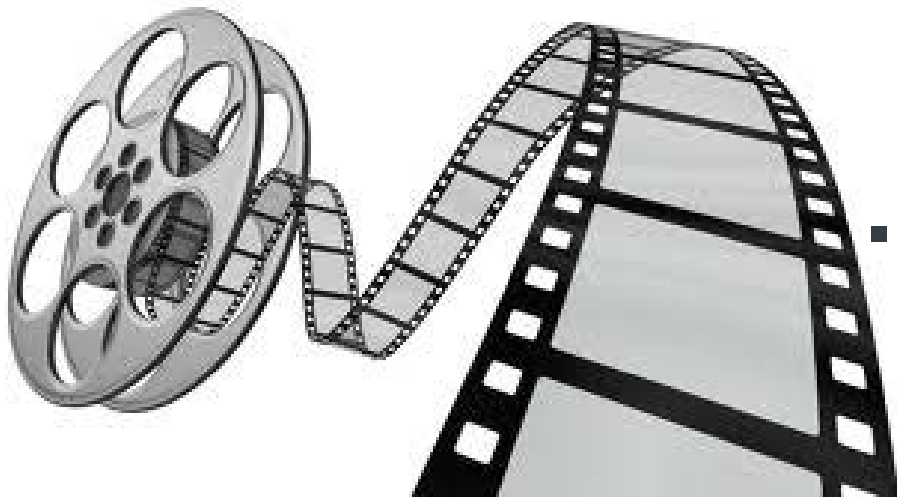
*"They are boring and generally the same thing over and over again, Cinema adverts are different and exciting."*

*"They become monotonous seeing the same thing everyday."*

*"Also because TV adverts are repeated multiple times per day you often see the same adverts multiple times in a day , so eventually I just start channel-hopping to avoid the TV adverts."*

*"On TV, you see the same thing over and over again. TV ads are short and unmemorable, and often I can't tell which ad belongs to which brand because they are so similar."*

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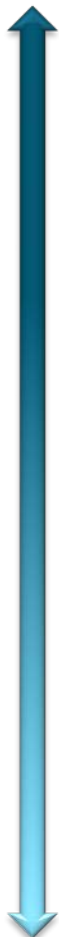
Cinema grabs attention considerably more effectively than other forms of media, most of which allow ample means of escape from the message. This is particularly strong amongst the younger groups, black and lower LSM participants which all reported very high levels of attention to cinema ads

**Relative Attention**

How much attention do you pay to each of the following types of adverts? - Top2Box %

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100% full attention



- Cinema advertising – 72%
- Television advertising – 60%
- Outdoor advertising – 49%
- Magazine advertising – 48%
- Online advertising – 44%
- Radio advertising – 41%
- Newspaper advertising  
Mobile phone advertising 36%

0% no attention at all

Exploring attention paid to Cinema Ads

Above average

<b>LSM 6-7</b> 79%	<b>Black</b> 79%	<b>15-20 yrs</b> 78%	<b>21-24 yrs</b> 77%
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Average

<b>25-29</b> 71%	<b>Male / Female</b> 72%	<b>Indian</b> 70%	<b>LSM 8-10</b> 71%
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Below average

<b>White</b> 65%	<b>30-34 yrs</b> 65%	<b>Coloured</b> 69%
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The ads that are easier to ignore appear to be rated as the least irritating – most likely because they can be so easily filtered out. Of the remainder which are more difficult to ignore, cinema is the least irritating, with TV following close behind.

## Relative Irritation

How would you rate your level of irritation of cinema advertising relative to other forms of advertising?

n=684

Billboard / Outdoor advertising

-25%



Newspaper advertising

-3%



TV advertising

+3%



Online advertising

+30%



← Less irritating than cinema

More irritating than cinema →

Magazine advertising

-22%



Radio advertising

+20%



Mobile phone advertising

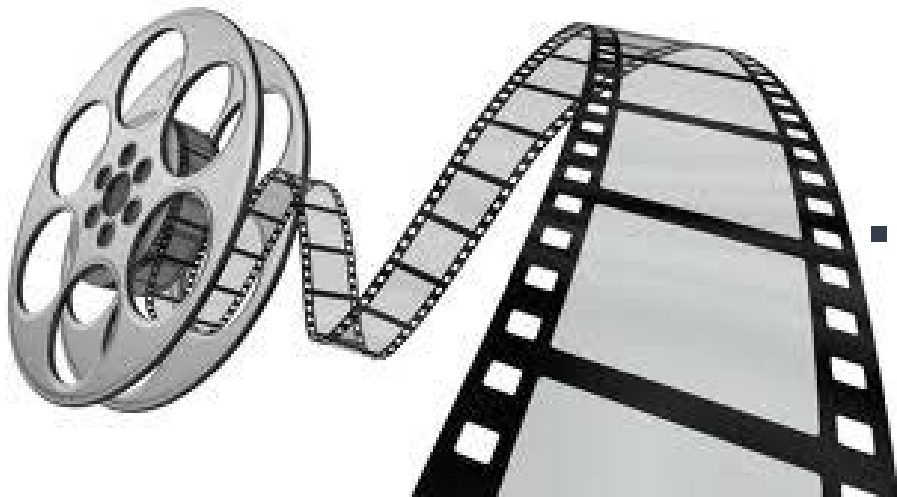
+43%



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TV ads do have a bit of an edge over cinema ads, most likely due to the fact that they are seen very regularly. However, cinema does beat all other forms of advertising. Cinema ads are particularly influential amongst the youth market and LSMs 6 and 7

## Influential Ranking

In many instances, adverts are trying to convince you to use or buy a product or service. Please select the top three MOST INFLUENTIAL types of advertising.

	Ranked 1 <sup>st</sup> – most influential	Overall ranked score	Demographically
<b>TV Ads</b>	39%	1 <sup>st</sup> – 59%	TV's impact does not differ very significantly from group to group
<b>Cinema Ads</b>	22%	2 <sup>nd</sup> – 38%	15-20 yr olds and LSM 6 & 7 markedly more likely to rank cinema as influential
<b>Online Ads</b>	11%	3 <sup>rd</sup> – 24%	Influential amongst Coloureds and Whites, not Indians or Blacks – also low amongst LSM 6&7
<b>Radio Ads</b>	5%	4 <sup>th</sup> – 18%	More impact on 30-34 yr olds. Quite low influence on Blacks
<b>Magazine Ads</b>	6%	5 <sup>th</sup> – 17%	Patchy influence – not very much influence on males, under 25s, Black and lower LSMs
<b>Outdoor Ads</b>	6%	5 <sup>th</sup> – 17%	Differences not marked but a bit lower on 15-20 yr olds and lower LSMs
<b>Mobile Ads</b>	6%	7 <sup>th</sup> – 14%	Limited influence amongst 30-34 yr olds, females and Whites
<b>Newspaper Ads</b>	4%	8 <sup>th</sup> – 12%	Limited influence, slightly elevated amongst 30-34 yr olds, males and Indians

Weak influence

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Overall ranked score calculated by weighting  
1<sup>st</sup> \* 100%, 2<sup>nd</sup> \* 67% and 3<sup>rd</sup> \* 33%

Almost half of all those surveyed had either investigated something from an advert at the movies, or had actually gone out and bought due to the ad. Younger viewers were most likely to take action due to an ad, whilst black movie-lovers and males also stood out as being more susceptible to cinema advertising

## Influence to Action

Has a cinema ad ever influenced you to buy something or to find out more about a product or service?



**Who is more readily influenced to take action?**

15-20 and 21-24 yr olds – 55% Yes  
Males 51% Yes  
Blacks 61% Yes  
LSM 6&7 56% Yes

46%

21%

33%

**Who are more difficult to convince?**

30-34 yr olds – 41% No  
Whites 45% No

**YES**  
**MAYBE**  
**NO**

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# In Summary

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*There is a multitude of evidence to support the effectiveness of including cinema advertising into the advertising mix:*



Cinema ads are NOT avoided - Only 3% of the cinema goers intentionally arrive after the ads are finished



Cinema ads offer uninterrupted viewing whereas television ad breaks are synonymous with skipping channels, toilet runs, snack missions, Facebook updates and telephone calls



Cinema ads are enjoyed more than any other form of advertising - only 16% disliked cinema ads



Cinema ads grab more attention than ads via any other media



Cinema adverts influence behaviour - 46% of movie-lovers had bought or investigated a product / service directly as a result of a cinema ad



If an advert is seen on BOTH television and cinema, a mere 7% rate the television version as more effective