Ipsos MediaCT
The Media, Content and Technology Research Specialists

The power of the big screen

A Thought Piece based on TouchPoints3 Data

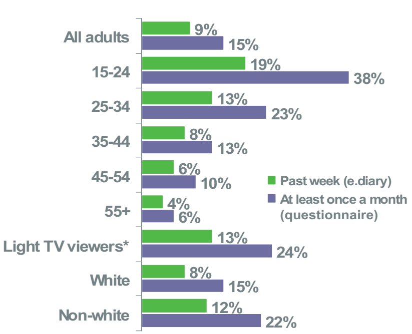
2011

Cinema audiences in the UK have been enjoying a decade and a half of steady growth, peaking at 173.5 million in 2009. The exact causes are open to debate, but the introduction of multiplexes in the mid 80s and, more recently, the explosion of 3D, diversification of the cinema offer, and price promotions such as "Orange Wednesday", all appear to have ensured the health of cinema even in a time of recession.

With its current popularity and credentials, and with the potential for 3D advertising to create **even more impact in the near future**, this would seem to be the right time for advertisers and planners to take cinema very seriously. The IPA TouchPoints3 Hub and Channel Planner, with its **rich seam of data about genre preferences and cinema behaviour**, linked with all other media currencies, provides valuable insights into the lives and attitudes of the cinema audience and gives advertisers a unique planning tool to establish how cinema can best be integrated into their communication plans.

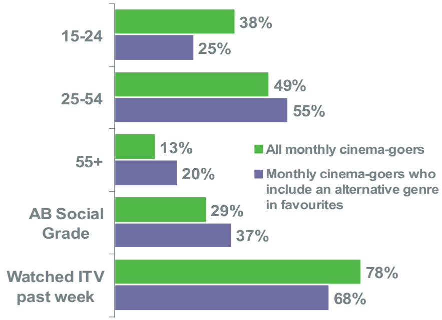
The Hub data tell us that nearly 15% of GB adults (c.7.5 million aged 15+) visit the cinema at least once a month, rising to 38% of 15-24 year olds and 22% of non-white adults. Monthly cinema-goers are **young, upmarket and affluent** in comparison with others. They are **early adopters and are influential** amongst their peers, being significantly more likely than others to agree that "I always seem to be the first in my group to have the latest thing" and that "Friends ask my advice on new products or brands". They are also **lighter consumers of all other media**, with the exception of the internet.

Recency and frequency of cinema visits



Source: IPA TouchPoints3 Hub Survey | * *Lightest third of TV viewers – 9hrs 27 mins per week*

Profile of all monthly cinema-goers vs all including an alternative genre in favourites



Source: IPA TouchPoints3 Hub Survey Self-Completion Questionnaire

Data from the e.diary, in which respondents accounted for every half hour over the course of a week, tell us that 9% of adults and **19% of those aged 15-24 visited the cinema** during the e.diary week, with visits peaking, as expected, on Fridays and Saturdays (and with a midweek peak on Wednesdays) and in the evenings, the times when internet usage is at its lowest, making **cinema a great complement to online**.

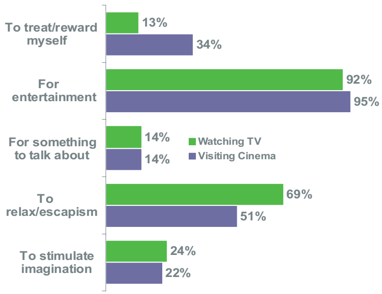
Frequent cinema visitors display enthusiasm for film in all its formats. Although 9% of them admit to streaming or downloading films from unofficial sites on a monthly basis, **38% buy a DVD at least once a month** and over half (54%) pay for a film (either online, bought or rented on DVD, via TV pay-per-view or delivered to a games console), compared with 19% of those who visit the cinema less frequently.

Traditional "blockbuster" genres remain the most popular, according to the IPA TouchPoints3 self-completion questionnaire, with comedy, action and adventure topping the list of favourites for most key subgroups. The average monthly cinema-goer has relatively wide-ranging tastes within the mainstream, mentioning around **seven different genres as favourites**. Although the mainstream may offer more limited opportunities for incremental reach, much of cinema's potential lies in the facility it offers to target by film or by genre, and here the potential for additional reach seems more promising.

Around one in eight adults in the IPA TouchPoints3 Hub survey mentions at least one "alternative" genre (art house, biopics, documentary and foreign language) as a favourite, rising to one in four monthly cinema-goers. (This does not include the Bollywood enthusiasts, another great opportunity for advertising to predominantly Asian audiences.) The "alternative" group proves to be the real cinema enthusiasts, who are more than twice as likely as others to visit the cinema at least once a month (31%). By share of total admissions, this group is therefore likely to have an importance well beyond its 12% of population. Their skew towards those of AB social grade and their particularly light TV viewing gives alternative cinema obvious **potential to generate incremental reach**, while their high propensity to cite music and the arts as favourite genres on television augurs well for the relatively recent introduction of live ballet and opera performances to the big screen.

It is not only the size and profile of the cinema audience that makes them so desirable a target; their clear advantage over other media is in terms of their **receptiveness to advertising**. According to TouchPoints3, 75% of monthly cinema-goers who express an opinion say that they tend to arrive in time for the trailers and advertisements, and, in a world of multi-tasking and almost constant interaction, cinema really is the **only single-task medium remaining**, the entertainment medium most conducive to switching off entirely from the "always-on" world of other media and communications. The TouchPoints3 data show that cinema differentiates itself clearly from television in fulfilling the role of a treat or reward; it is the **ultimate appointment to view** and the nearest an advertiser can get to guaranteeing the complete attention of the audience. While the same film on television or DVD might be talked over,

Reasons for visiting cinema



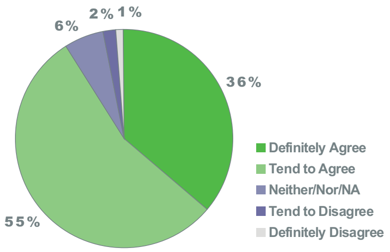
Base: All watchingTV/visitng cinema at least once a month
Source: IPA TouchPoints3 Hub Survey Self-Completion Questionnaire

discussed online, paused, fast-forwarded or otherwise interrupted, cinema etiquette dictates that we sit back and give our full attention to the screen, distracted only by the obligatory bag of popcorn.

It seems logical that the captive audience, big screen and surround sound should lead to attention levels well beyond that experienced with television, and that high levels of emotional arousal should enhance advertising recall. Indeed, research case studies by cinema sales houses have demonstrated that cinema advertising leads to recall that is more detailed, more spontaneous, lasts longer and creates higher brand favourability than the same advertising on television. Despite the significantly higher cost per thousand for an equivalent creative, some have argued that the unique features of cinema advertising actually make it twice as cost-effective as TV.

Word of mouth is a selling point for cinema too; monthly cinema-goers have an average of twelve family members and very close friends with whom they communicate fairly often. They are also twice as likely as others to have social networked online during the survey week (65% compared with 32% of non cinema-goers), with the higher propensity reflected within age group as well as in total. Furthermore, 91% of monthly cinema-goers say that they **often talk about films they've seen** at the cinema with friends and family. With cinema advertising very much part of the entertainment, it seems reasonable to assume that advertisers will benefit to some extent from the same effect.

"I often talk about films I've seen at the cinema with friends or family"



Base: All who visit the cinema at least monthly
Source: IPA TouchPoints3 Hub Survey

About Ipsos MediaCT

Ipsos MediaCT helps clients make connections in the digital age. We are leaders in providing research solutions for companies in the fast-moving and rapidly converging worlds of media, content, telecoms and technology.

About IPA TouchPoints

IPA TouchPoints is a unique, consumer-focused, multi-media database produced specifically to provide insights into how people use all media.

The Hub Survey gives a unique view of how media usage fits into people's daily lives, through respondents recording their activities for each half hour across a week in an e.diary. The TouchPoints Channel Planner is created by integrating the industry media currencies onto the Hub Survey to provide the only industry available, multimedia channel planner.

Ipsos MediaCT conducts research for a number of film distribution clients, as well as all other major media, and we would be delighted to hear from you if you think we might be able to help with your research in this or related areas. For more information, please contact:

Judith Kennedy
T: +44(0)20 8861 8163
E: judith.kennedy@ipsos.com
www.ipsos-mori.com