



MOTIVATE VALMORGAN
cinema advertising



Cinemas in KSA - Audience Profile, Preferences and Perception of Advertising

Background

Saudi Arabia has embarked on a new, transformational era of growth led by Vision 2030 (stamped by Saudi Crown Prince Mohamed bin Salman) to modernize and move the country forward, with one of the key announcements in 2017 being the lift of a 35-year ban on cinemas.

With several multiplexes already set up across key cities in Saudi Arabia, and many more in the pipeline over the next 5 to 10 years, cinema as a form of entertainment has been received with great excitement and is in great demand across the Kingdom.

The opening of cinemas at an exponential rate has also paved the way for cinema advertising, with industry leaders claiming that the medium has the potential to cut through neutrality, creating positive impact on recall, perception and comprehension of advertisements.



Cinema Trends in KSA



Source: KSA Cinema Exhibitors

Executive Summary

In order to evaluate the role of cinema advertising as part of the total cinema experience in Saudi Arabia, **Motivate Val Morgan** - market leader in cinema advertising across the Middle East, commissioned **Ipsos** - global market and opinion research specialist, to conduct a quantitative research study.

The report, **Cinemas in KSA – Audience Profile, Preferences and Perception of Advertising**, examines the following:

- Cinema audience viewing habits and preferences
- Cinema as a medium for advertising: impact, recall and how it compares to other forms of advertising

The key objective of the study was to determine the value of adding cinema advertising to an advertiser's media mix.



Methodology

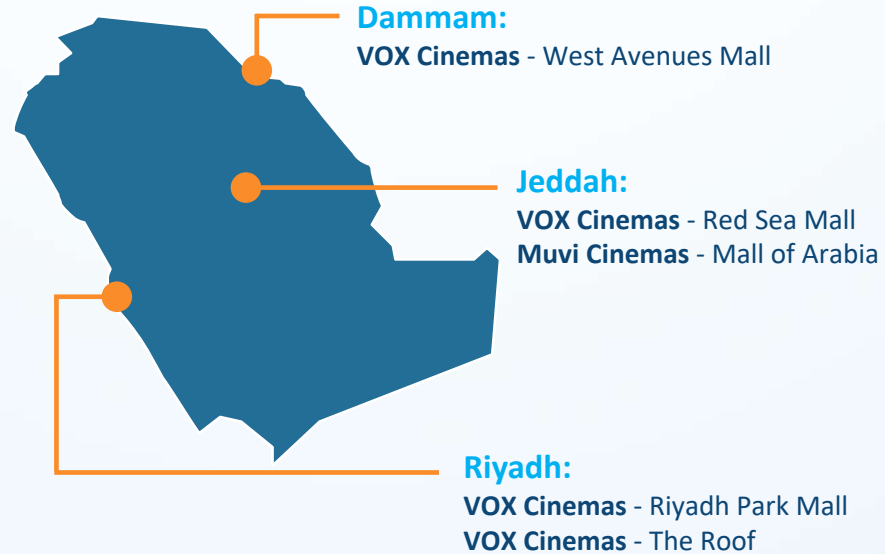


Sample Size: 530
(At least 100 at each cinema location)



Face to Face Exit Interviews
using Tablets

Those above the age of 15 years, who watched any movie alongside the release of '*Jumanji: Welcome to the Jungle*' at the following cinema locations:



Questionnaire Administration Time:
10 to 15 minutes



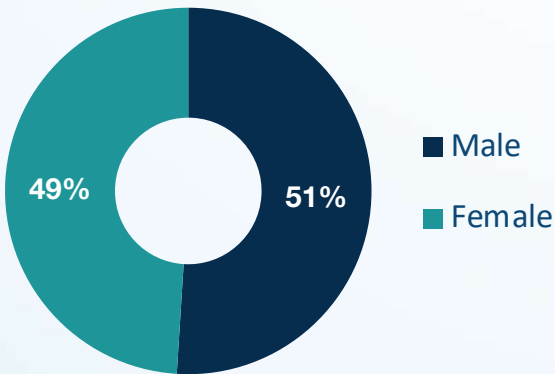
Survey Conducted:
December 2019



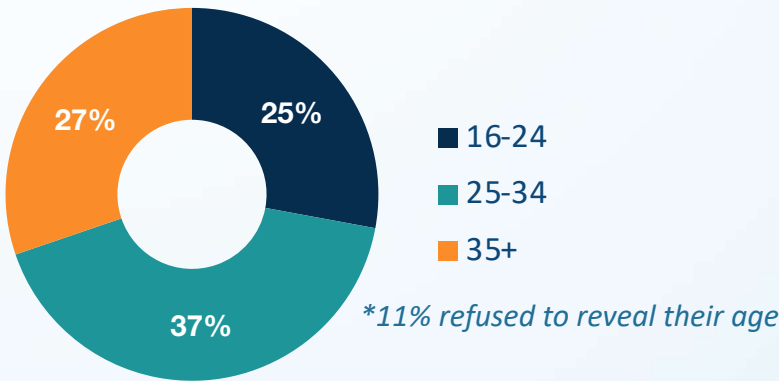
Demographic Profile (1/2)



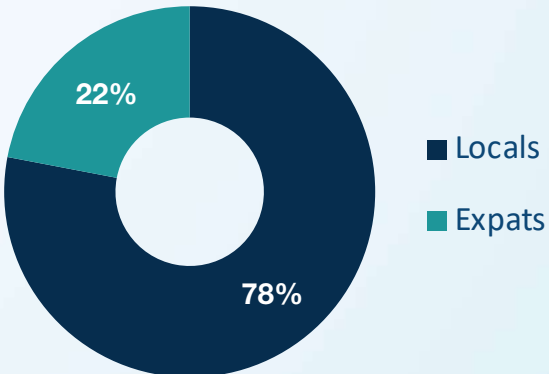
GENDER



AGE GROUPS



NATIONALITY



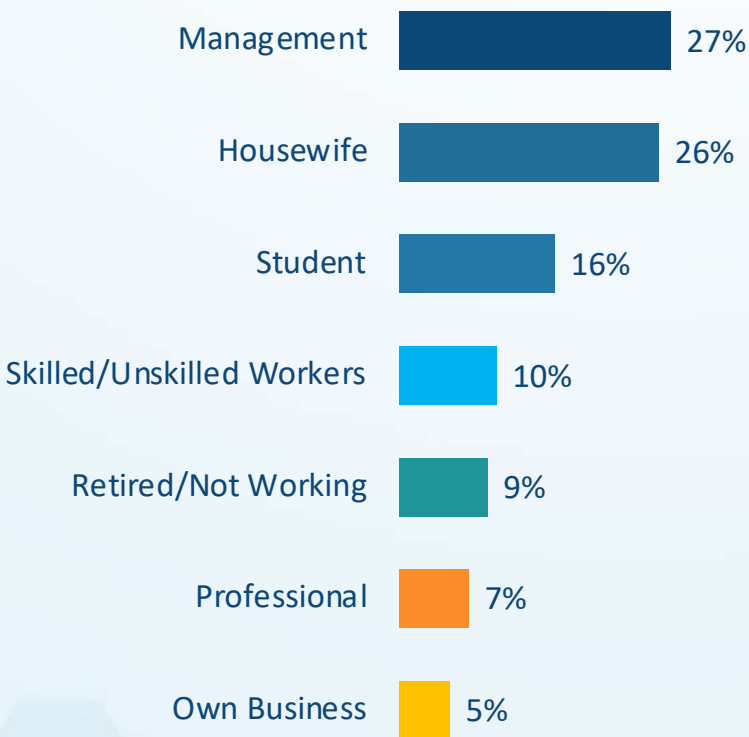
Sample Achievement (Location wise)	Total	Gender		Age Split				Nationality	
		Male	Female	16 – 24	25- 34	35+	Refused	Locals	Expats
Riyadh Park Mall (Riyadh)	108	57	51	48	39	17	4	80	28
The Roof (Riyadh)	100	50	50	25	24	41	10	80	20
West Avenue Mall (Dammam)	106	56	50	16	34	13	43	86	20
Red Sea Mall (Jeddah)	106	49	57	24	51	31	0	82	24
Mall of Arabia (Jeddah)	110	56	54	19	50	41	0	86	24
Total Sample	530	268	262	132	198	143	57	414	116

Base (all respondents): 530

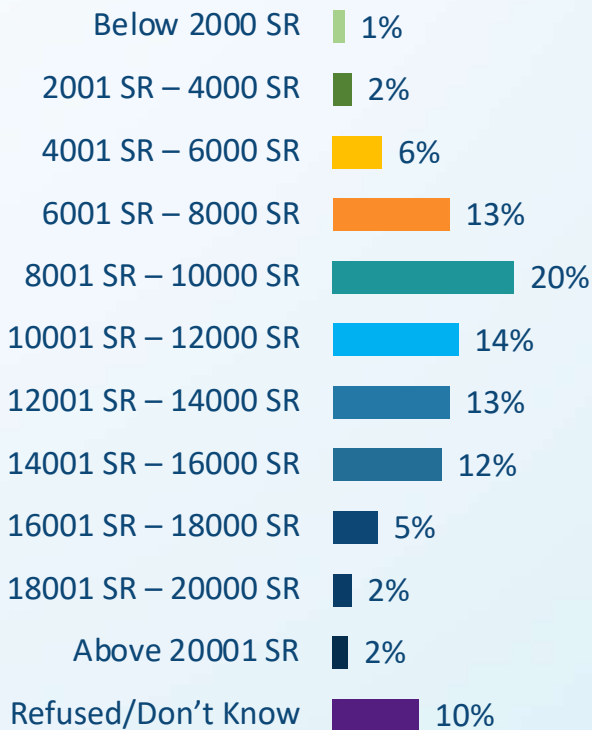
Demographic Profile (2/2)



OCCUPATION

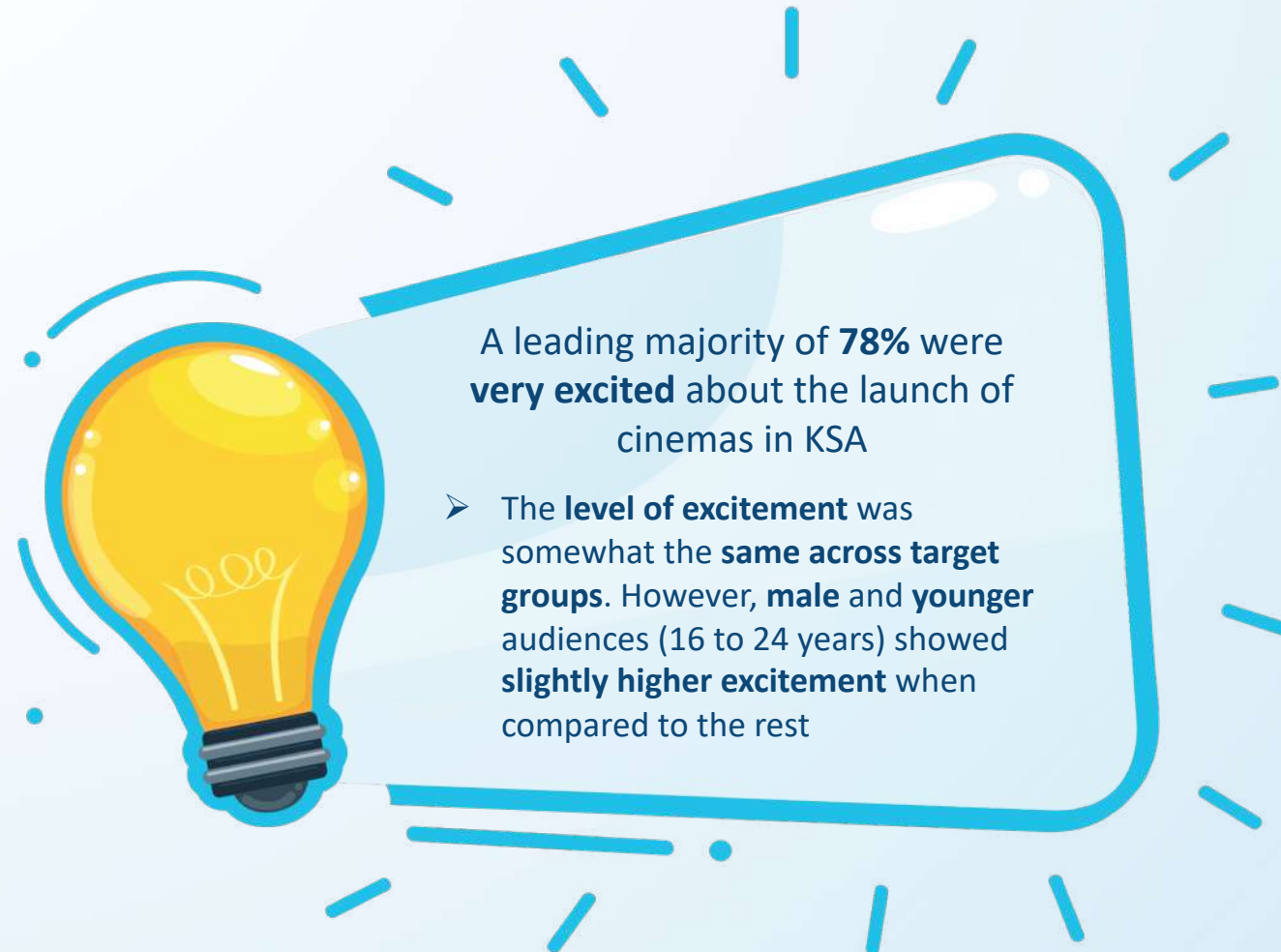
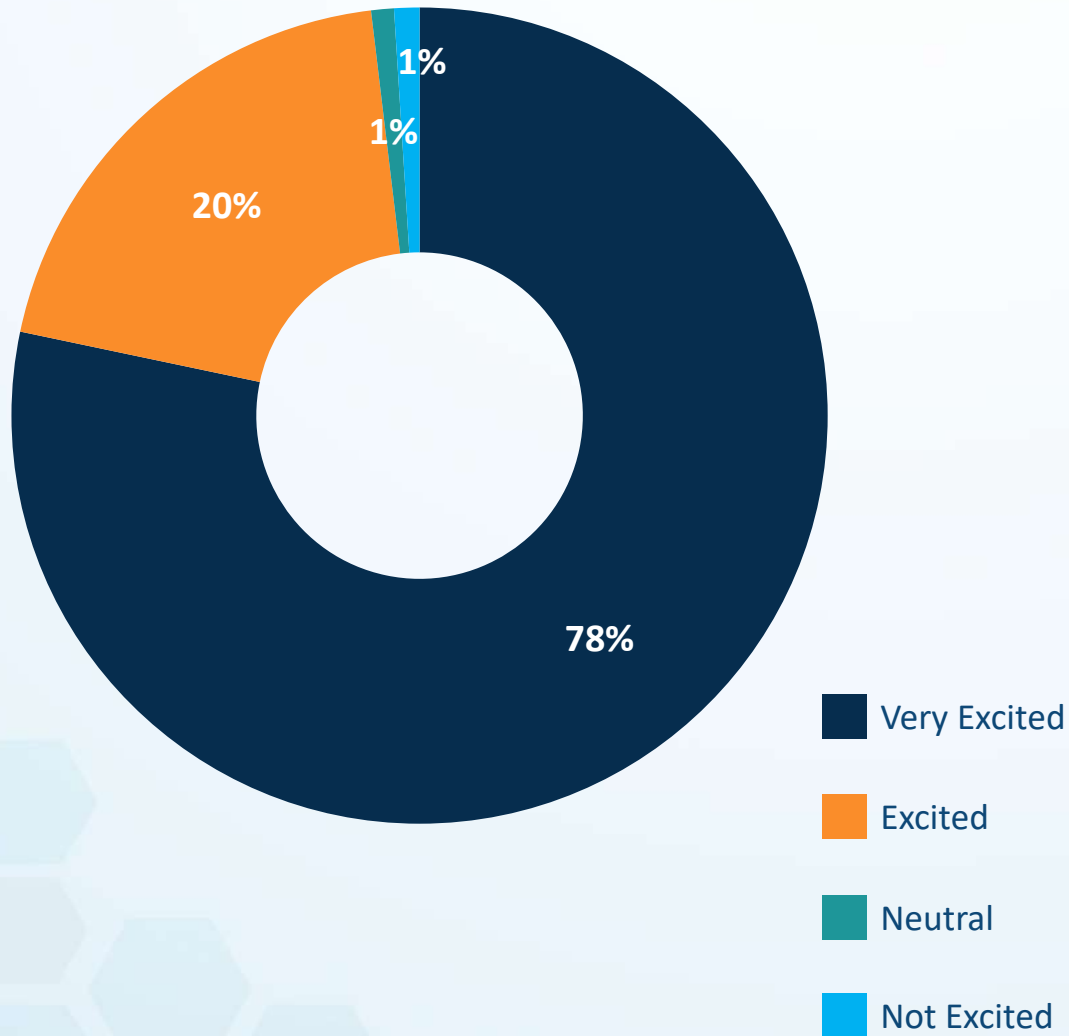


TOTAL INCOME IN HH



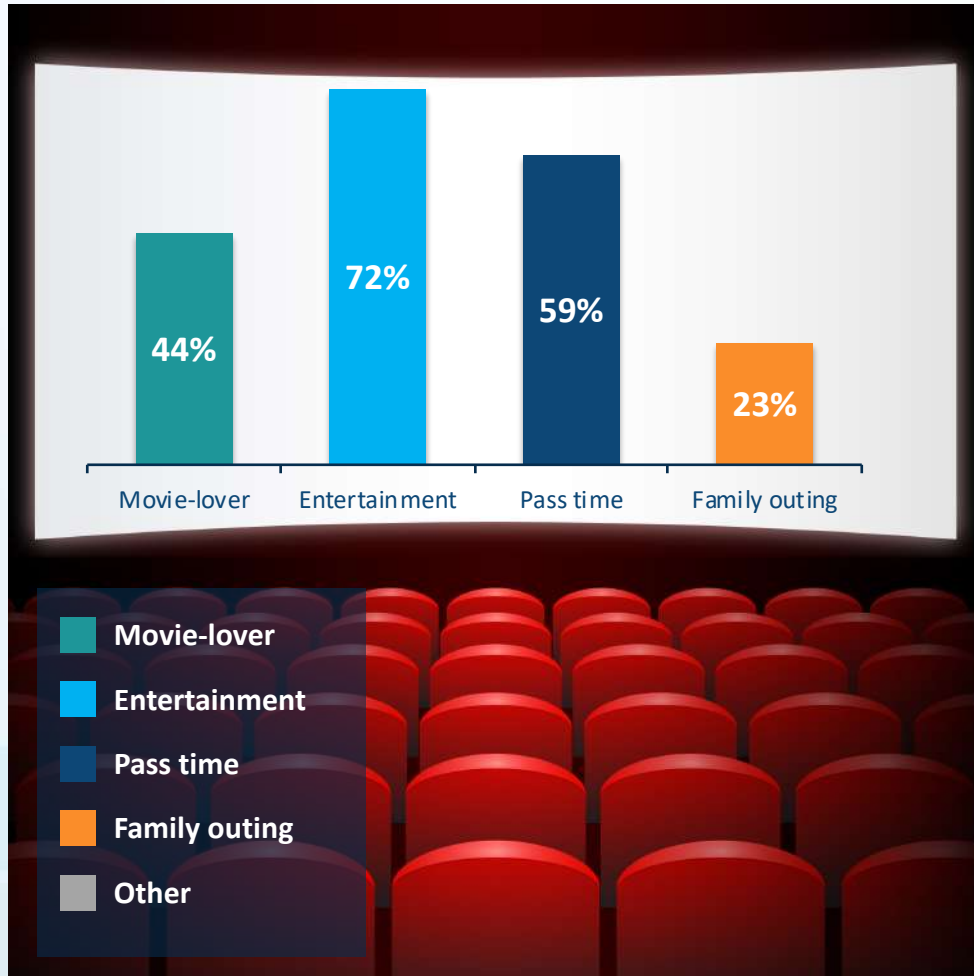
Base (all respondents): 530

Excitement on Cinemas Opening in KSA

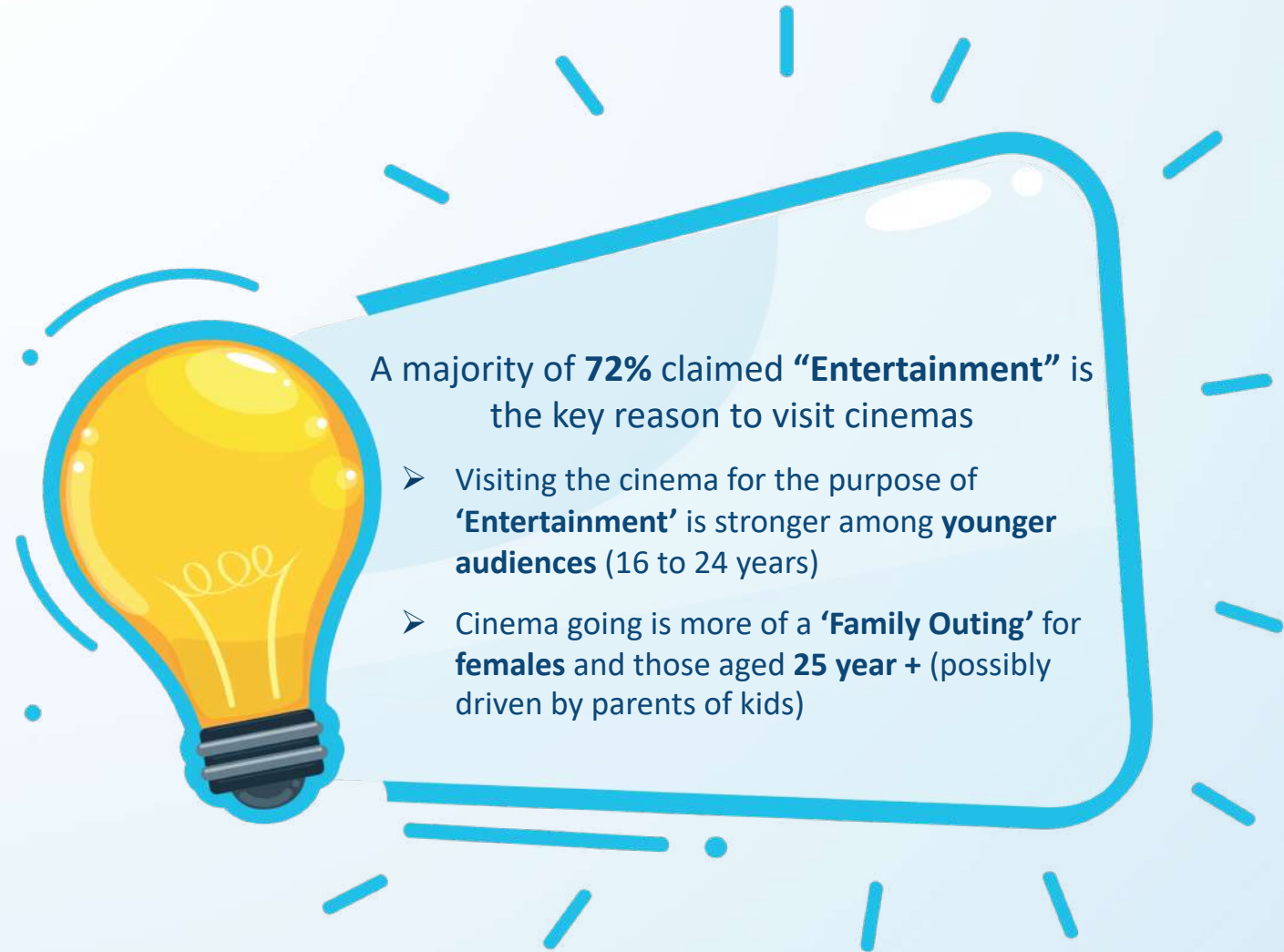


Base (all respondents): 530

Reasons to Visit Cinema

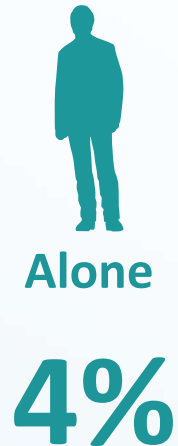


Please Note: This was a multiple choice question

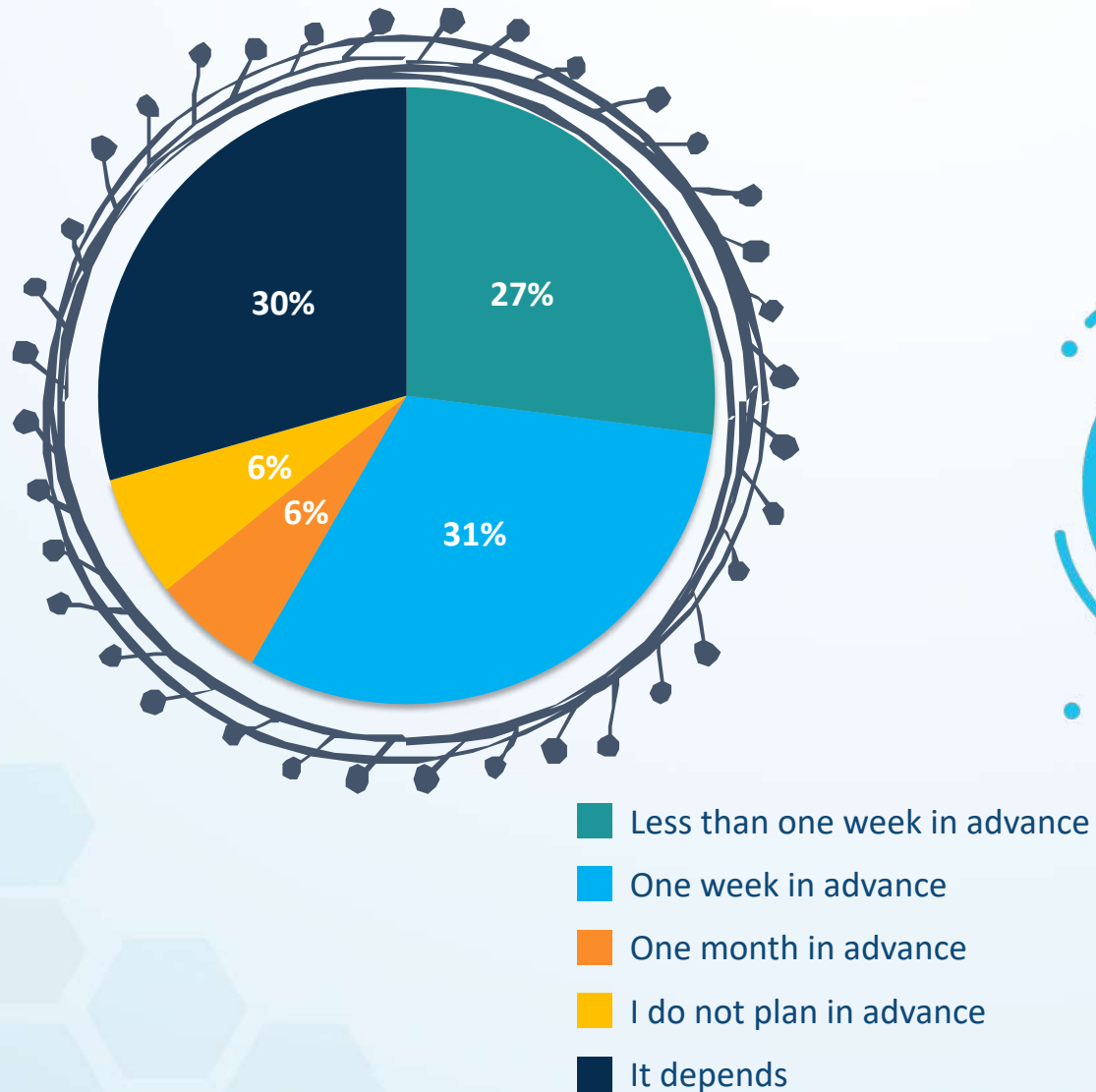


Base (all respondents): 530

Cinema Accompaniment
















Planning for Cinema



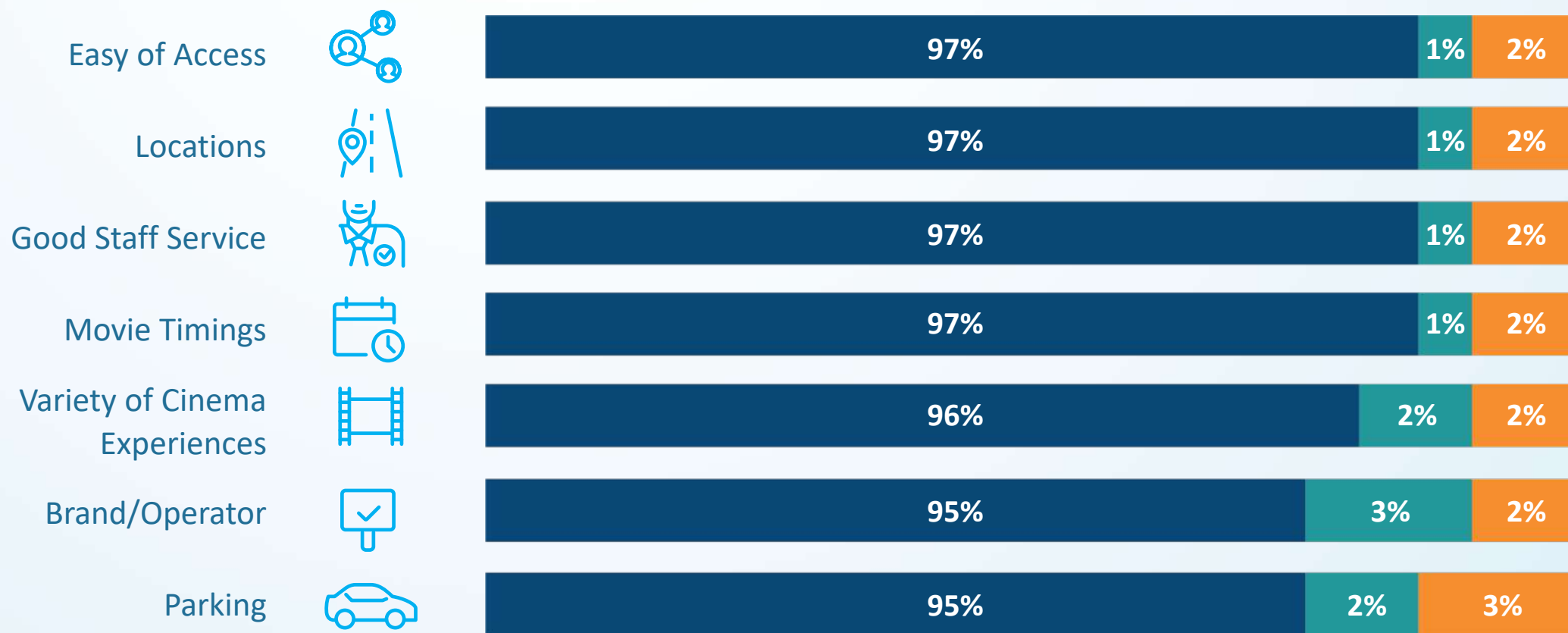
Base (all respondents): 530

Cinema Experiences That Amaze – By City

Riyadh	Dammam	Jeddah	
 54%	 2%	 42%	 32%
 39%		 36%	 31%
 5%		VIP  26%	 24%
VIP  2%		 14%	 11%

Base: respondents who have tried the above experiences

Factors Considered When Choosing a Cinema



Very Important/Somewhat Important Neutral Somewhat Not Important/Not Important

Base (all respondents): 530

Time of Arrival at the Cinema



59%

10 to more than 15 mins
before movie start time



25%

5 mins before
movie start time



9%

Exactly at
movie start time



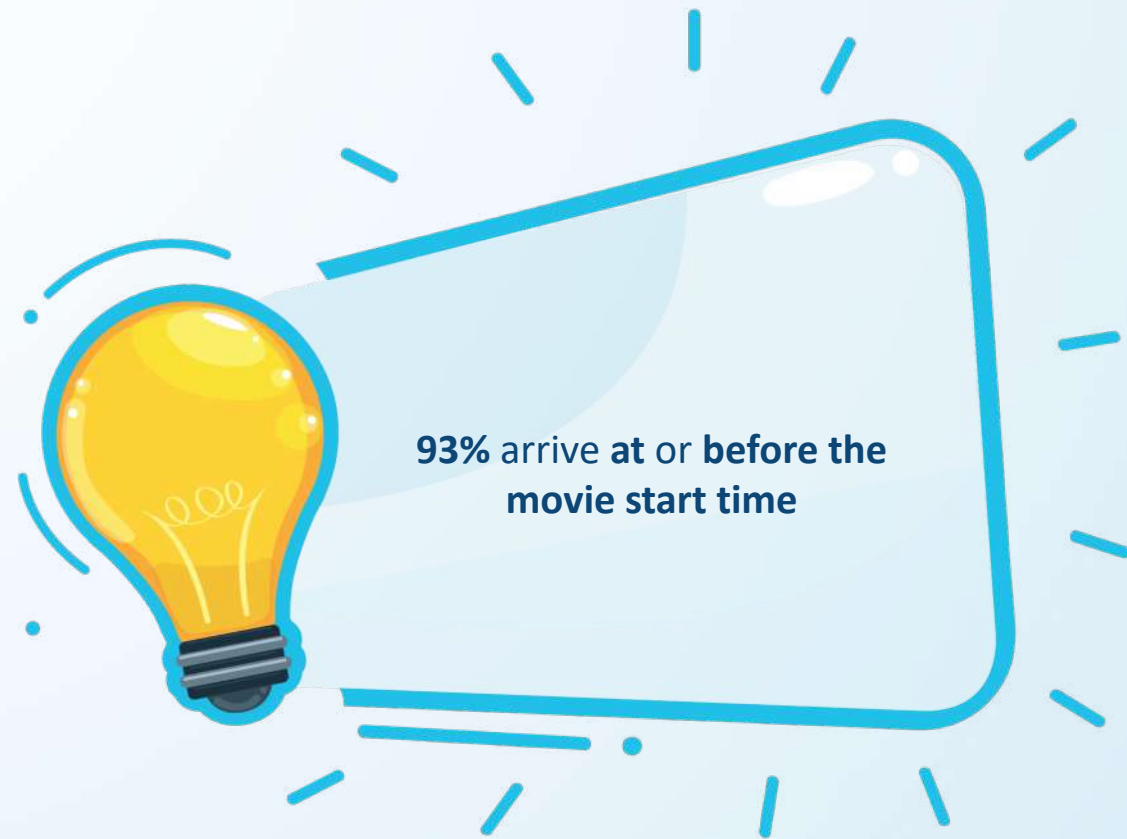
4%

5 mins after
movie start time



3%

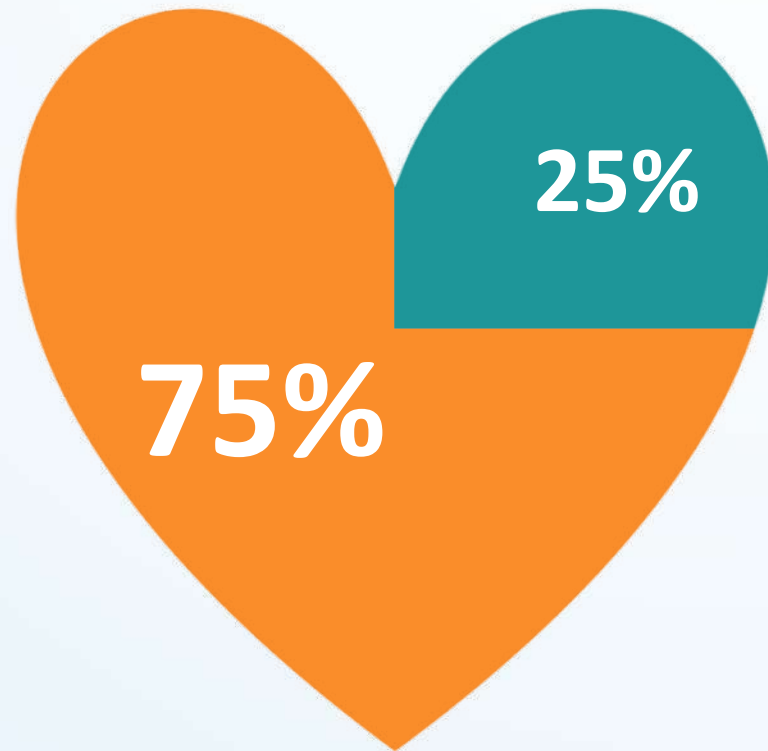
10 to more than 15 mins
after movie start time



Please Note: Movie start time refers to the time on the movie ticket, which includes advertising and trailers

Base (all respondents): 530

Enjoy Watching Cinema Ads?



Yes
No



Base (all respondents): 530

Cinema Ads - Part of the Total Movie Experience?



Yes
78%



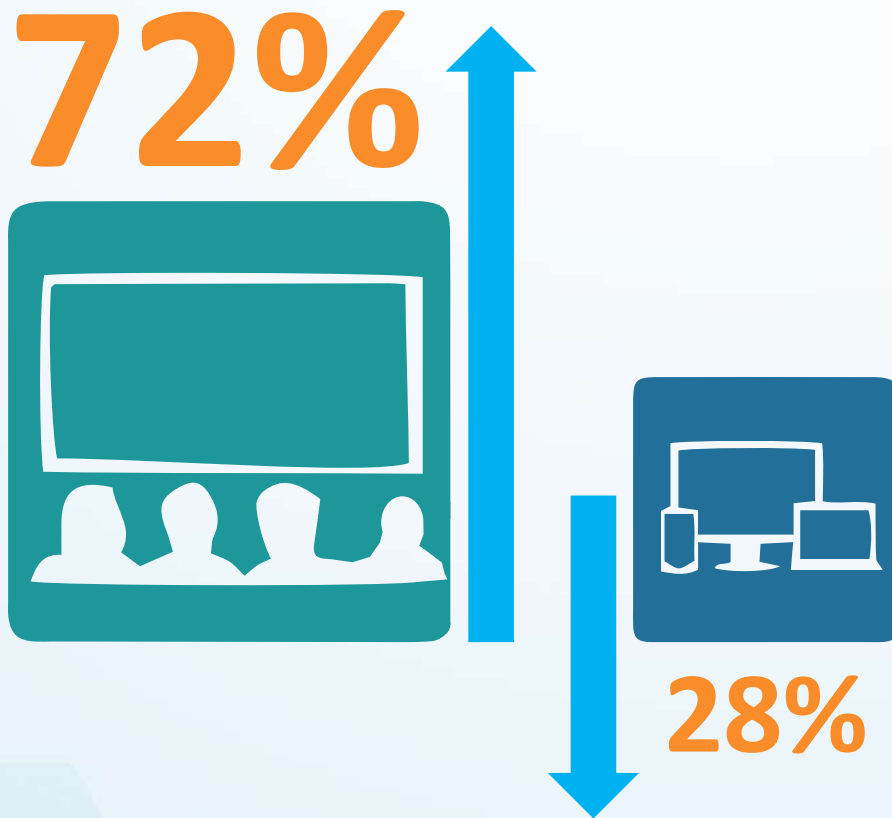
No
22%



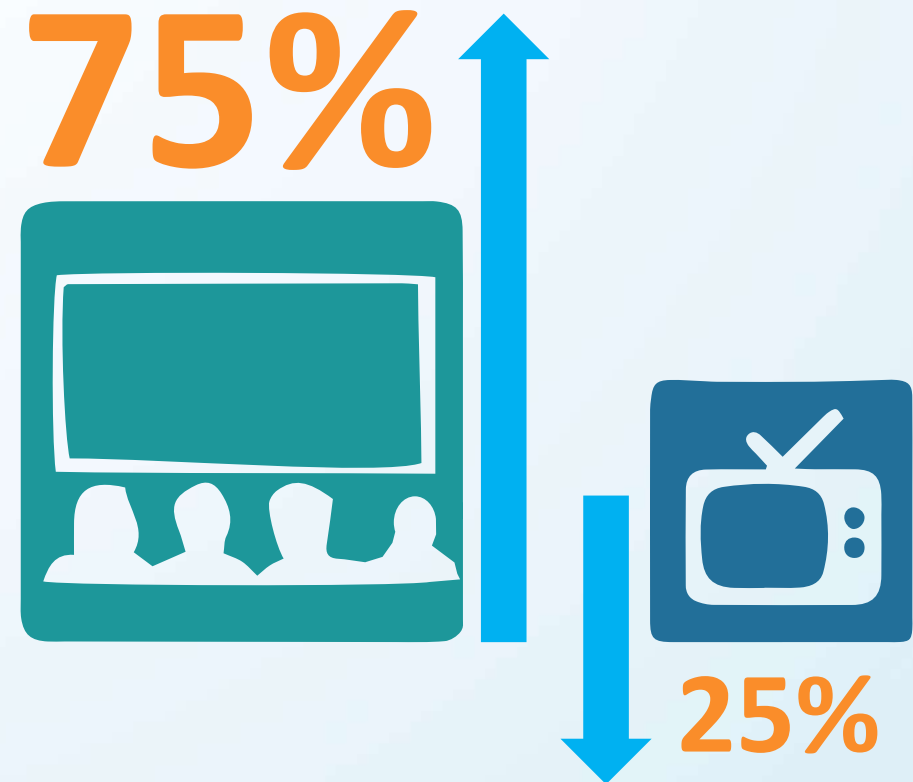
Base (all respondents): 530

Cinema Ads - Impact

Cinema vs Digital

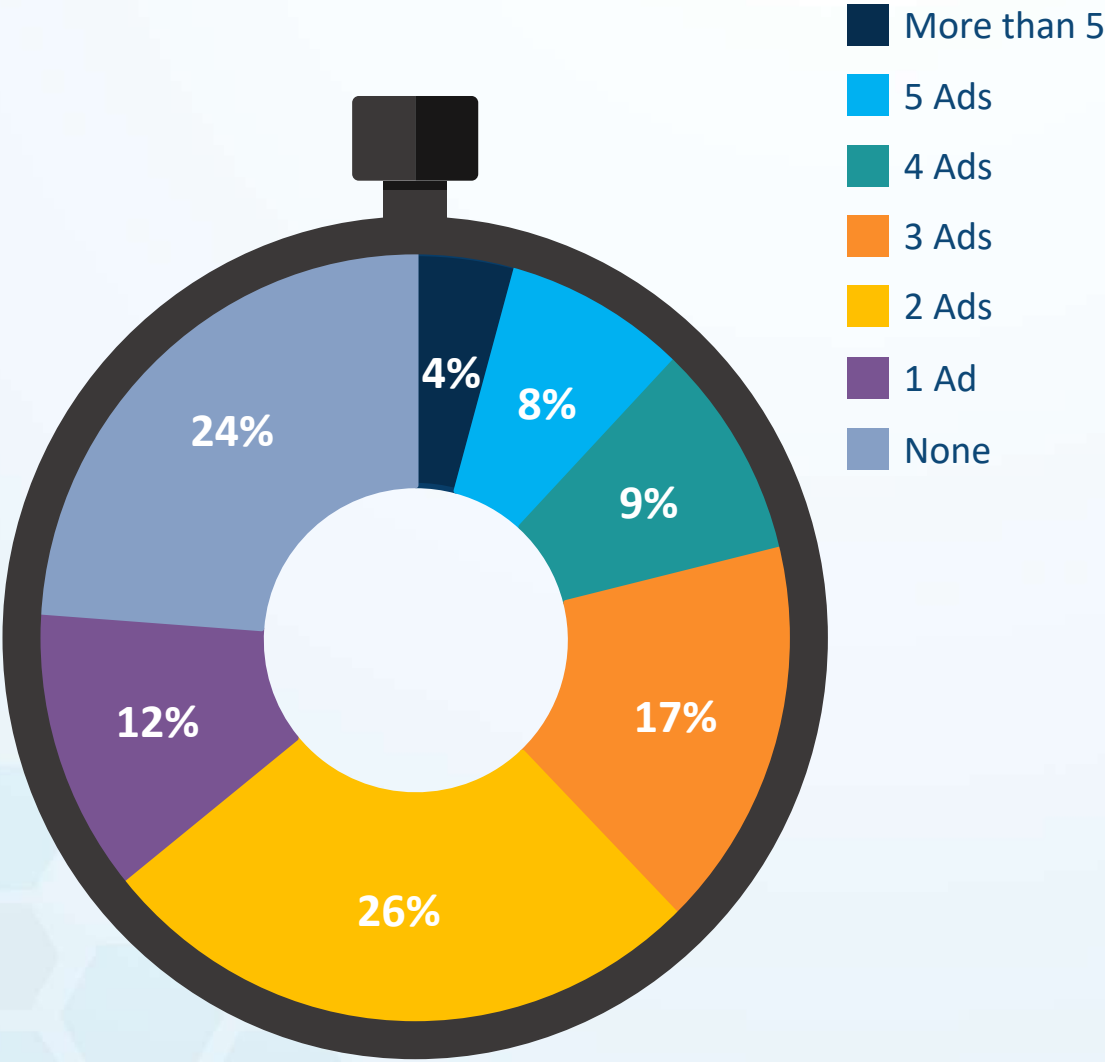


Cinema vs TV



Base (all respondents): 530

Unprompted Cinema Ad Recall - Count



Base (all respondents): 530

Unprompted Top Brands Recalled – All Locations



SEPHORA



SAUDI
GERMAN
HOSPITAL
DUBAI



Please Note: The brands displayed above are in no particular order

Base (all respondents – across the five cinema locations): 530

Top Brands Recalled – Riyadh Park Mall

Total Awareness



L'OCCITANE
EN PROVENCE



west elm



MOVADO



SEPHORA



زين
ZAIN



KAEC
مدينة الملك عبدالله الاقتصادية
Another World



Please Note: 'Total Awareness' includes both prompted and unprompted recall
The brands displayed above are in no particular order

Base (all respondents at Riyadh Park Mall): 108

Top Brands Recalled – The Roof

Total Awareness



Please Note: 'Total Awareness' includes both prompted and unprompted recall
The brands displayed above are in no particular order

Base (all respondents at The Roof): 100

Top Brands Recalled – West Avenue Mall

Total Awareness



SEPHORA



Please Note: 'Total Awareness' includes both prompted and unprompted recall
The brands displayed above are in no particular order

Base (all respondents at West Avenue Mall): 106

Top Brands Recalled – VOX Red Sea Mall

Total Awareness



Please Note: 'Total Awareness' includes both prompted and unprompted recall
The brands displayed above are in no particular order

Base (all respondents at Red Sea Mall): 106

Top Brands Recalled – Muvi Mall of Arabia

Total Awareness



SAMSUNG
Galaxy

SEPHORA



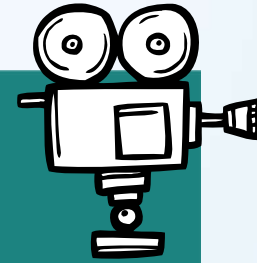
Please Note: 'Total Awareness' includes both prompted and unprompted recall
The brands displayed above are in no particular order

Base (all respondents at Mall of Arabia): 110

Key Findings (1/2)

78%

Feel excited about the launch of cinemas in KSA



93%

Arrive at the cinema before or by the movie start time



75%

Enjoy watching cinema ads



78%

Believe advertisements are part of the total cinema experience



Key Findings (2/2)

72%

Consider cinema ads to be more impactful than digital ads



75%

Consider cinema ads are more impactful than TV ads



76%

Recall 1 to more than 5 cinema ads from a cinema visit



Takeaways for Advertisers

There is presently great demand for cinema in KSA. Based on our findings, cinema operators will not have a problem in attracting crowds to their existing and upcoming locations over the next couple of years.

Cinema advertising is also well received in KSA. With cinema's unique ability to deeply engage with a captive and attentive audience in a unique environment - creating positive impact on recall, perception and comprehension of advertisements, there is a significant opportunity for brands to connect and engage with potential consumers in KSA like never before.

Given the overall findings from our research, we suggest the following to advertisers:

1

Cinema advertising is the new growth medium in KSA. Make cinema advertising an integral part of your brand's broader media mix for greater campaign impact.

2

Effective on-screen cinema advertising requires a slightly different approach to Digital and TV ads. Aim for running longer duration cinema ads over a lengthier time frame with more story-telling to make them more memorable

3

Each cinema operator offers unique cinema experiences which are in demand. For greater campaign effectiveness, choose a mix of locations

4

Take an integrated approach by combining off-screen with on-screen advertising for greater brand recall



MOTIVATE VALMORGAN
cinema advertising



Thank You