

Cinema Advertising Effectiveness Research

visit
QATAR

Conducted by: InsightzClub
Presented by: Motivate Val Morgan

KSA Market | December 2025

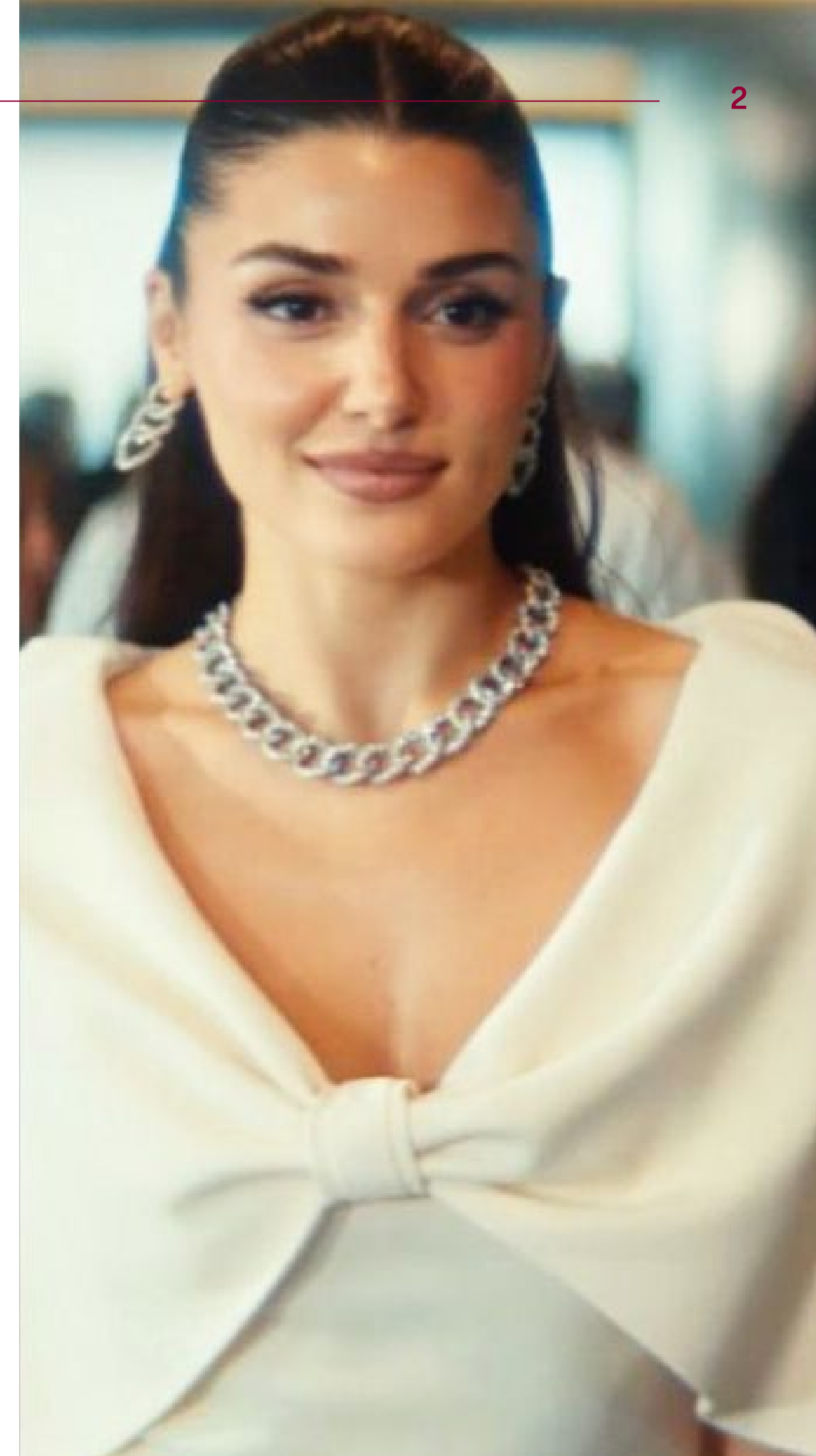


EXECUTIVE SUMMARY

Research Objective: Evaluate the effectiveness of Qatar Tourism's cinema advertising in shifting destination perception and driving travel consideration among KSA cinema-goers.

Metric	Control	Exposed	Lift
Destination Appeal (T2B)	77%	89%	+12pts
Destination Consideration	33%	43%	+10pts
Visit Intent (T2B)	81%	81%	+1pts
Ad Recognition (Aided)	0%	100%	+100pts
Brand Identification	0%	99%	+99pts

Conclusion: Cinema advertising drove statistically significant lifts across all primary KPIs, with some results exceeding industry benchmarks.



KEY INSIGHTS

Strategic Insights from Research:

Cinema Drives Destination Desirability

In a competitive regional travel market, cinema advertising successfully elevated Qatar's appeal and shifted perceptions from neutral to positive.

- +12pts appeal lift (T2B: 77% → 89%).
- Neutrality declined from 23% → 11% (shifted to positive).
- +10pts consideration lift (33% → 43%).

↳ Insight: Cinema creates emotional resonance with destinations, not just awareness.

Cinema Delivers High-Attention Environment

Cinema's captive environment ensures message reception and memorability.

- 74% attention/focus in cinema.
- 100% ad recognition (perfect visibility).
- 59% found ad memorable.
- 68% liked the advertisement.

↳ Insight: Cinema's lean-back environment creates receptive mindset for destination messaging.

Cinema Broadens Destination Knowledge

Cinema advertising successfully communicated Qatar's diverse offerings beyond sports and events.

- Awareness of attractions increased across all categories.
- Shopping/dining: 82% awareness in exposed group.
- Sporting events: 80% awareness · Entertainment/festivals: 72% awareness.
- Modern architecture: 77% awareness.

↳ Insight: Cinema can build on strength, not just fix weakness.

Qatar already leads consideration among KSA travelers, with cinema reinforcing competitive advantage.

- 43% consideration (exposed) vs. competing destinations:
 - Dubai: 21%
 - Abu Dhabi: 17%
 - Turkey: 26%
- High existing familiarity (17% already visited in past year).
- 81% visit intent demonstrates strong booking propensity.

↳ Insight: For established destinations, cinema reinforces preference and maintains top-of-mind status.

TABLE OF CONTENTS

Executive Summary ----- (Slide 2)

Key Insights ----- (Slide 3)

Table of contents ----- (Slide 4)

Research Methodology ----- (Slides 5-10)

Sample Composition ----- (Slides 11-14)

Primary Findings ----- (Slides 15-23)

Diagnostic Metrics ----- (Slides 24-28)

Insights & Recommendations ----- (Slides 29-30)

Appendix ----- (Slides 31-34)

RESEARCH METHODOLOGY

STUDY DESIGN

Research Design: Brand Lift Study (Exposed vs. Control)

Methodology:

- Post-exposure cross-sectional survey.
- Online questionnaire via mobile/web.
- Field period: 11 – 24 December 2025.
- Average completion time: 5 – 10 Minutes.

Sample:

- Total n = 300.
- Control group: n = 150 (cinemas without Qatar tourism ad).
- Exposed group: n = 150 (cinemas with Qatar tourism ad).
- Sampling method: Quota sampling based on cinema attendance.

Target Audience:

- KSA residents aged 18+.
- Visited cinema in past 2 weeks.
- Gender: Natural fall.



CINEMA ALLOCATION

Campaign Deployment:

Exposed Cinemas (n=5):

Cinema	Respondents	% Sample
VOX Cinemas - ROSHAN Front - Riyadh	39	26%
VOX Cinemas - Red Sea Mall - Jeddah	45	30%
AMC Cinemas - Panorama Mall 10 - Riyadh	22	15%
Muvi Cinemas - Mall of Arabia - Jeddah	16	11%
Muvi Cinemas - U Walk - Riyadh	29	19%
Total * 1 respondent visited 2 exposed cinemas	151	100%

CONTROL CINEMAS (n=15):

All other Saudi Arabia cinemas where Qatar tourism advertising did not run.
Sample distributed across: VOX, AMC and Muvi locations in Saudi Arabia.



QUESTIONNAIRE STRUCTURE

Screening (3 questions):

- S1: Age screening (18+ required).
- S2: Gender.
- S3: Cinema location visited (past 2 weeks).
 - > Determines control/exposed.

Main Questionnaire (12 questions):

Unaided Metrics:

- Q1: Unaided destination awareness (open ended).
- Q2: Unaided ad recall (cinema advertising).

Aided Metrics:

- Q5: Destination consideration (would visit).
- Q6: Qatar appeal (5-point scale).
- Q7: Event offering awareness (multiple answer).
- Q8: Qatar visit intent (5-point scale).

Ad Recognition:

- Q3: Ad recognition (shown masked ad).
- Q4: Brand identification (which destination?).

Touchpoints & Diagnostics (conditional):

- Q9: Media touchpoints (if Q4=Yes).
- Q10-Q12: Ad attention, likeability, memorability (if exposed & Q4=Yes).

STATISTICAL METHODOLOGY

This study measures the incremental impact of cinema advertising using a brand lift methodology:

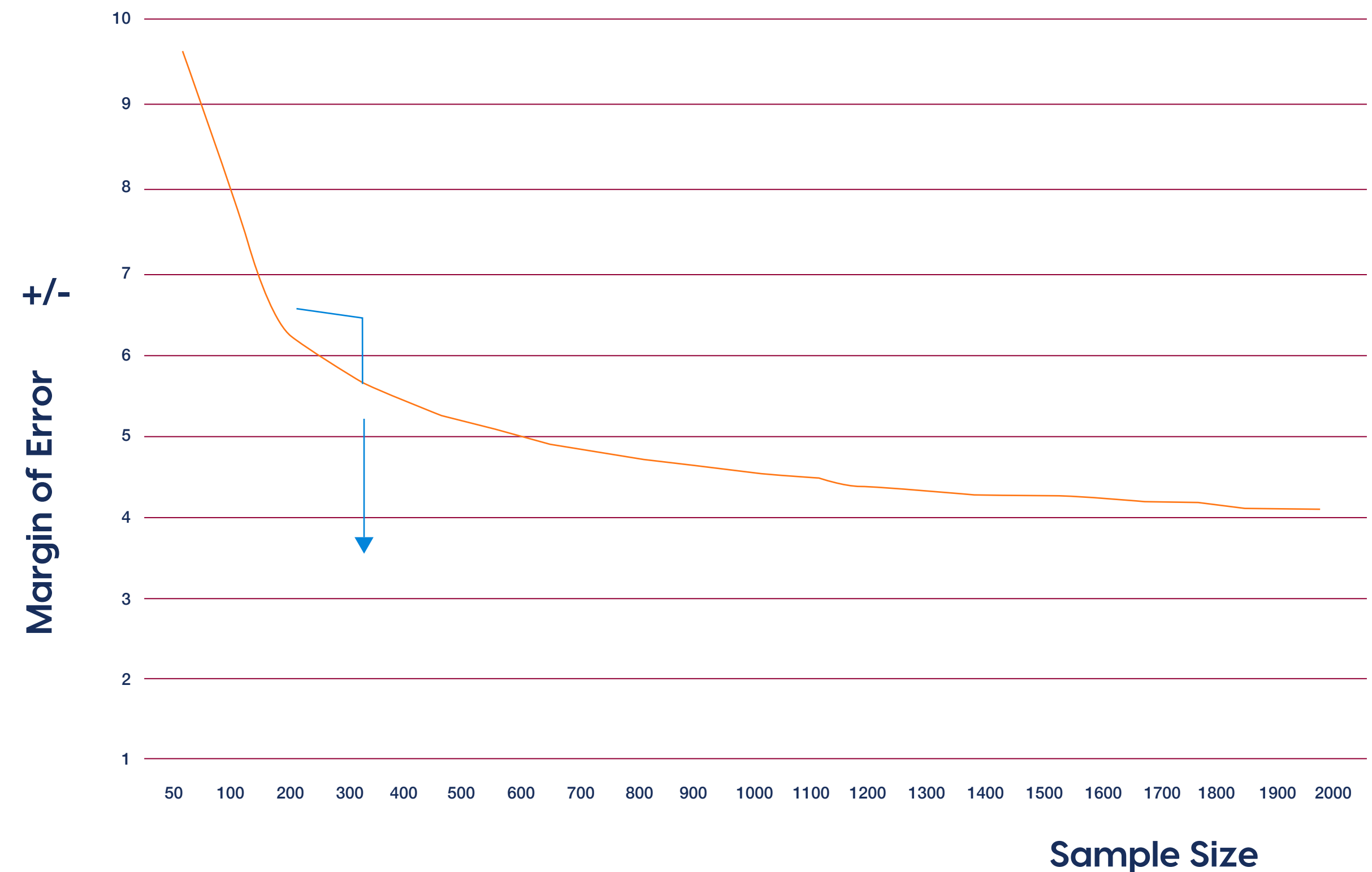
Sample Design:

- N=300 (Control: 150, Exposed: 150).
- KSA cinema-goers aged 18+.
- Margin of error: $\pm 5.6\%$ at 95% confidence.

Analysis:

- Two-proportion z-tests comparing control vs. exposed groups.
- 95% confidence level applied.
- All reported lifts are statistically significant ($p < 0.05$).

Interpretation: Results demonstrate the causal effect of Qatar Tourism cinema advertising on key brand metrics.



LIMITATIONS & ASSUMPTIONS

Assumptions

- Control and Exposed groups are comparable within the cinema-going audience.
- Cinema exposure provides a high-attention environment, supporting reliable ad recall.
- Creative execution and placement were consistent throughout the campaign period.
- External factors and other marketing activities affected both groups equally.

Limitations

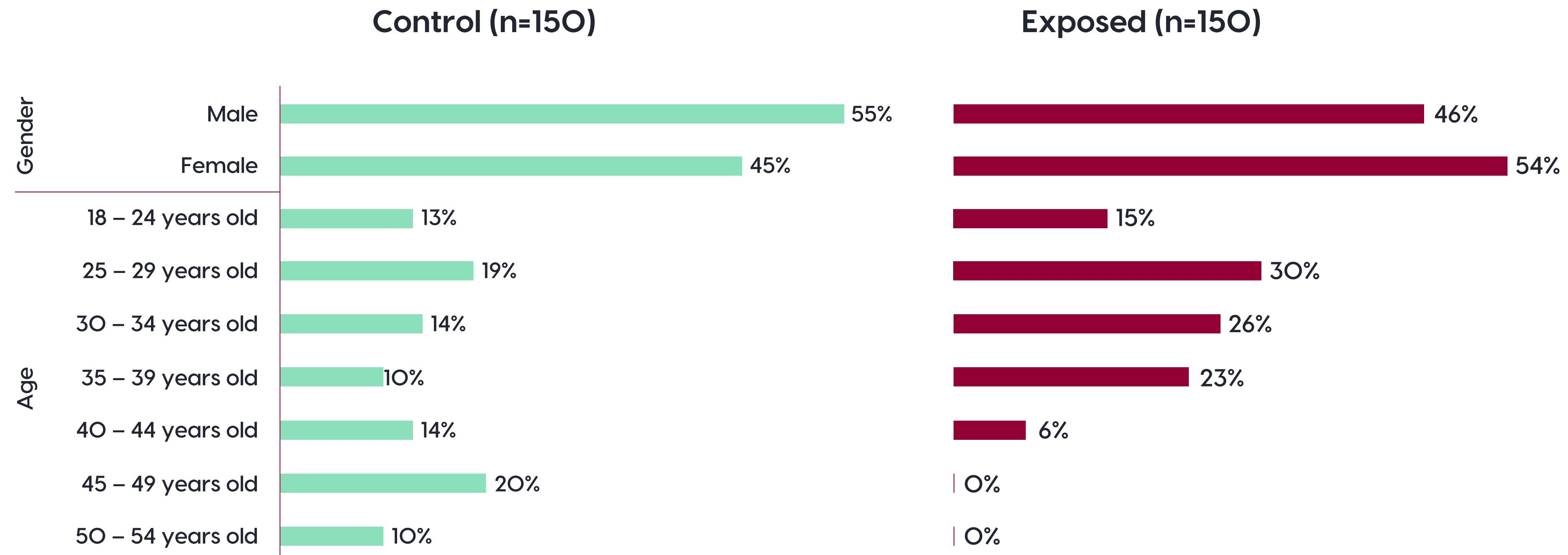
- Cross-channel exposure outside cinema may contribute to minor contamination.
- Ad exposure is based on self-reported recall and post exposure only.
- Result shows incremental cinema exposure vs non-cinema.
- Sample size limits deeper cuts by location, movie genre, or session time.



SAMPLE COMPOSITION

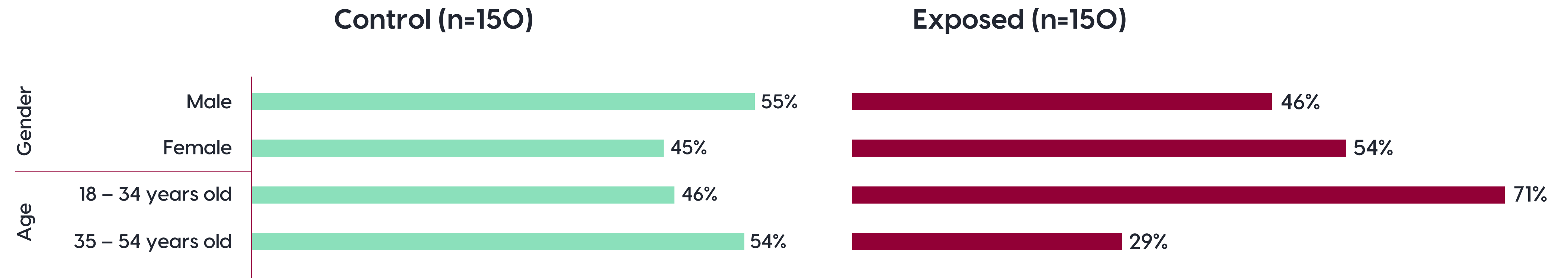
DEMOGRAPHIC PROFILE - AGE & GENDER

The exposed group skewed younger and more female than control, which can influence results. Lifts are representative of raw samples.



DEMOGRAPHIC PROFILE - AGE & GENDER

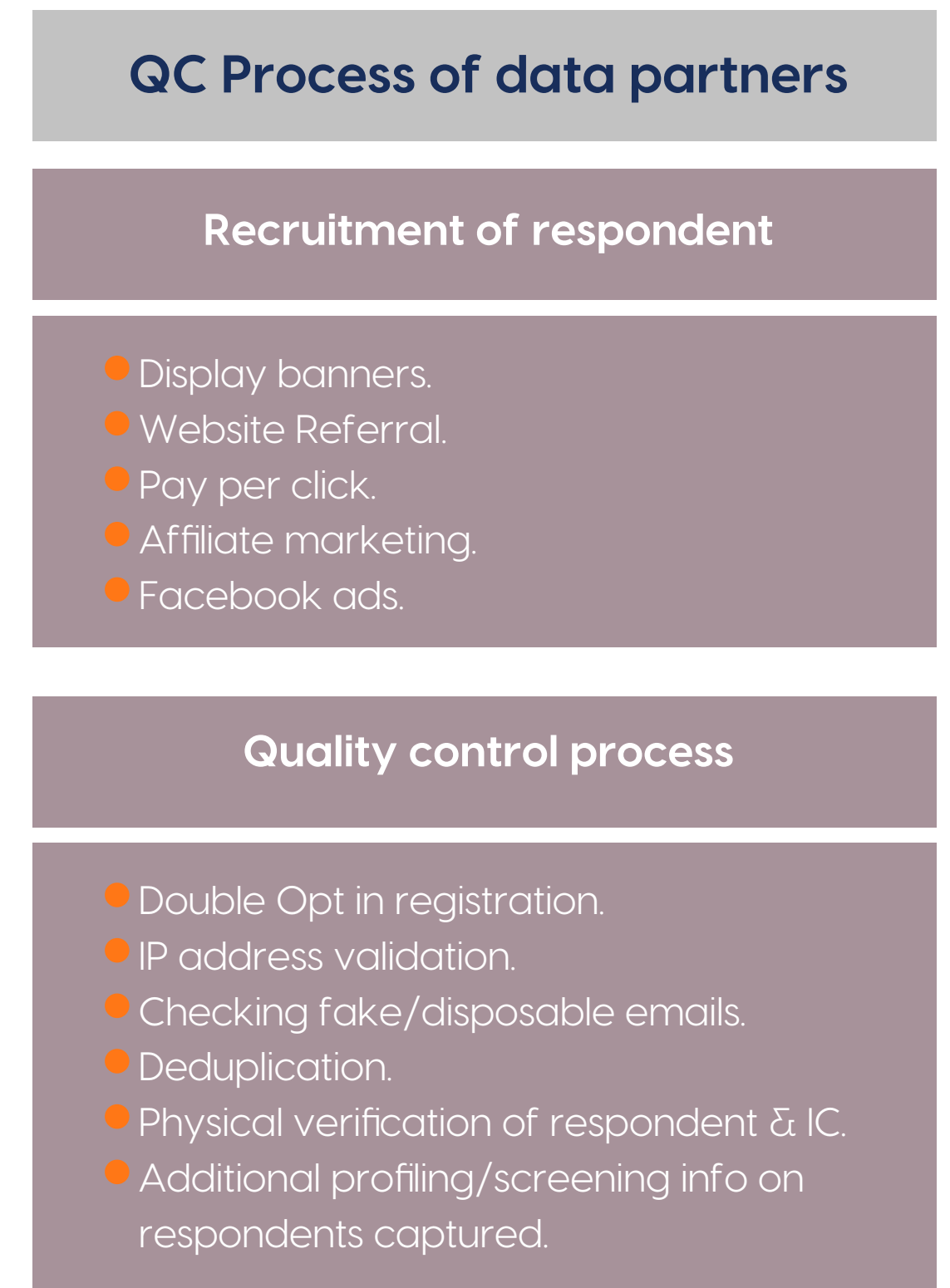
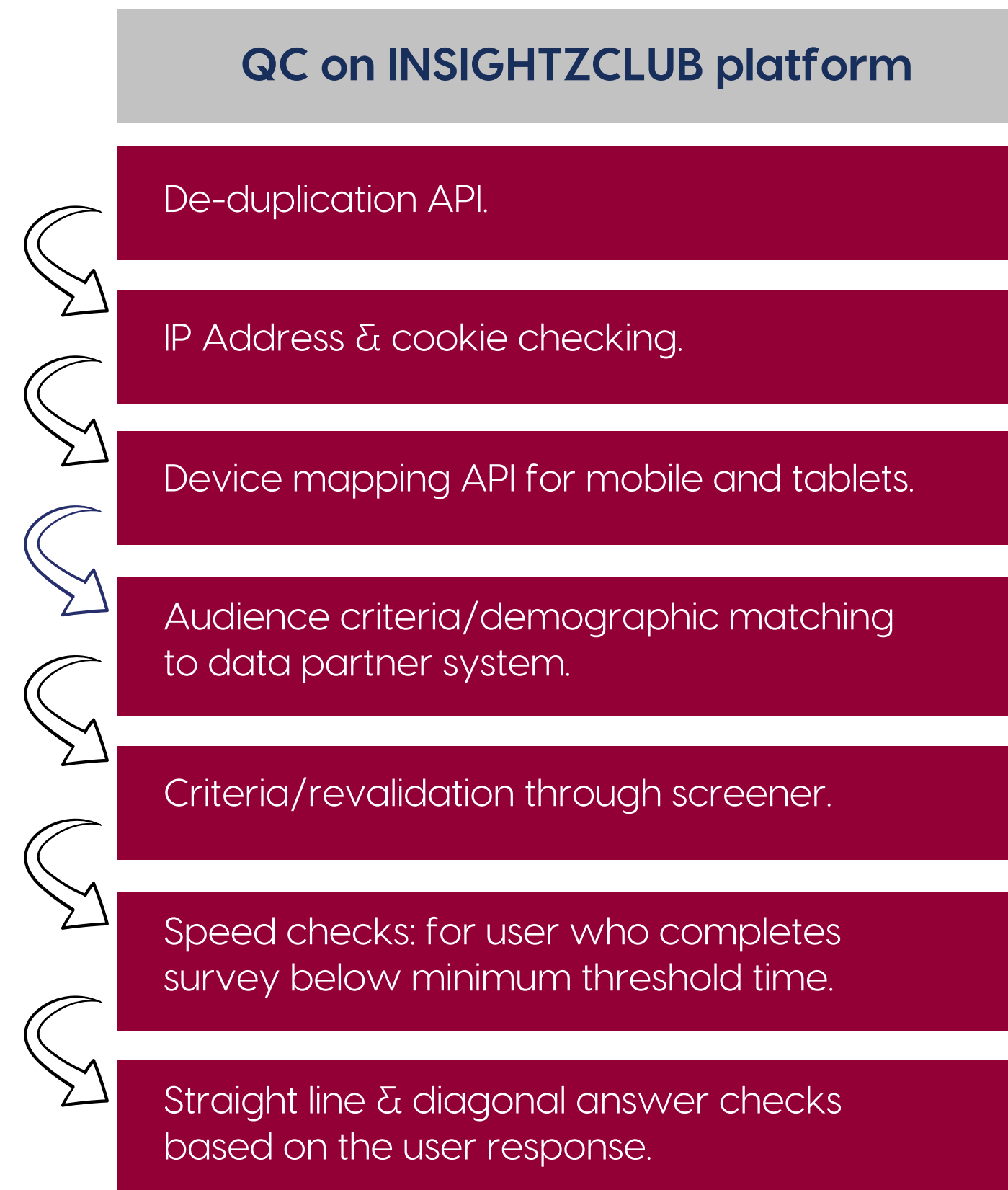
The exposed group skewed younger and more female than control (54% female vs. 45%), with 71% aged 18–34 compared to 46% in the control group.



N=300
Fieldwork Period : 11 – 24 Dec 2025

SAMPLE QUALITY METRICS

- Total surveys started: 504.
- Completion rate: 60%.
- Average completion time: 5 – 10 minutes.
- Contamination rate: 0.



*overachieving our target of 300 respondents.

PRIMARY FINDINGS

CAMPAIGN CUT-THROUGH & VISIBILITY

"Had you seen this specific advertisement during your cinema visit?"
"Which destination is this advertisement for?"

Metric	Control	Exposed	Lift
Aided Ad Recognition	0%	100%	+100pts
Brand Identification (Qatar)	0%	99%	+99pts

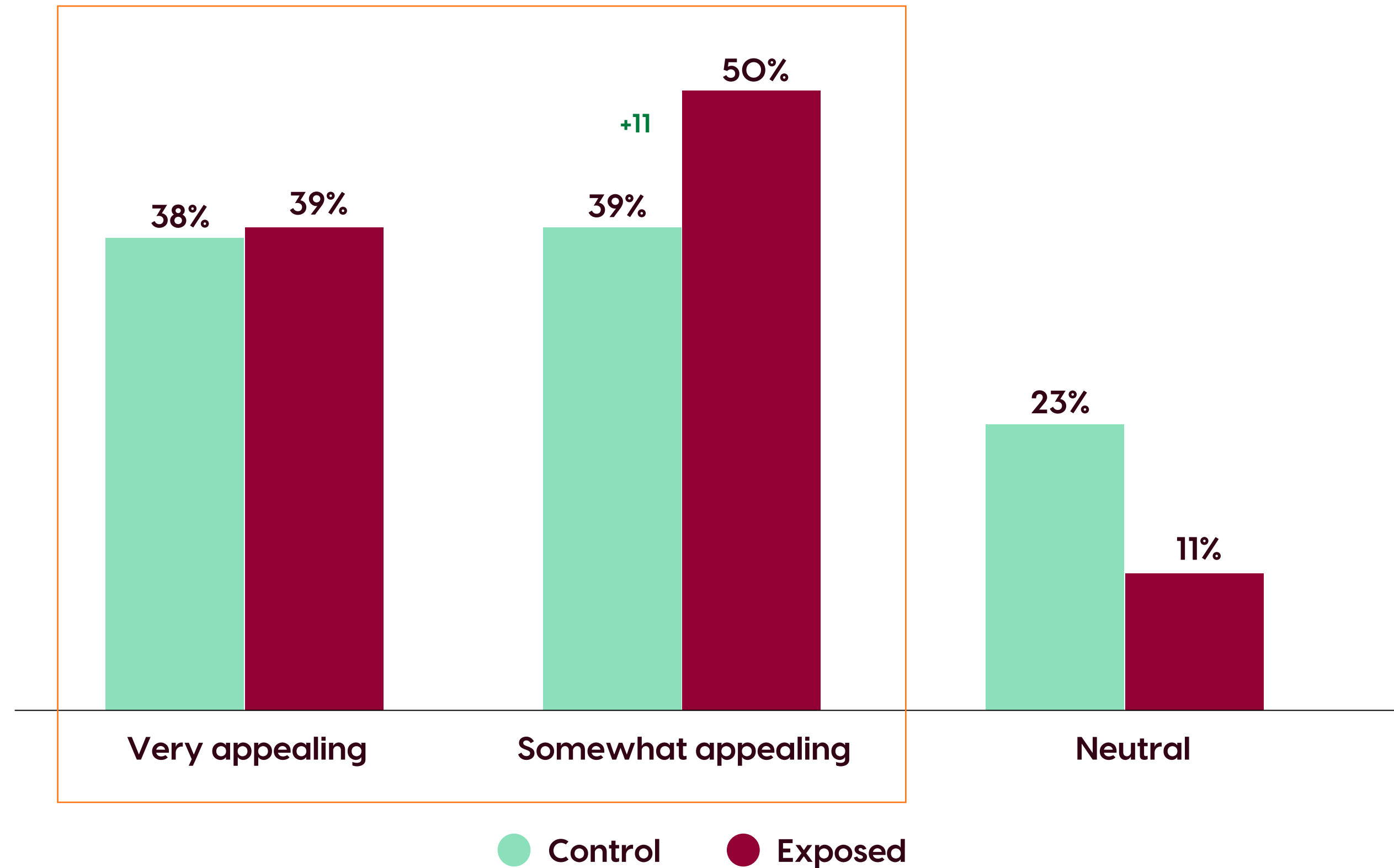
Findings:

Cinema advertising achieved perfect visibility with universal recognition.

Control vs. Exposed Results:

- Aided ad recognition: 0% → 100% (perfect visibility).
- Brand identification: 0% → 99% (clear attribution).

DESTINATION PERCEPTION



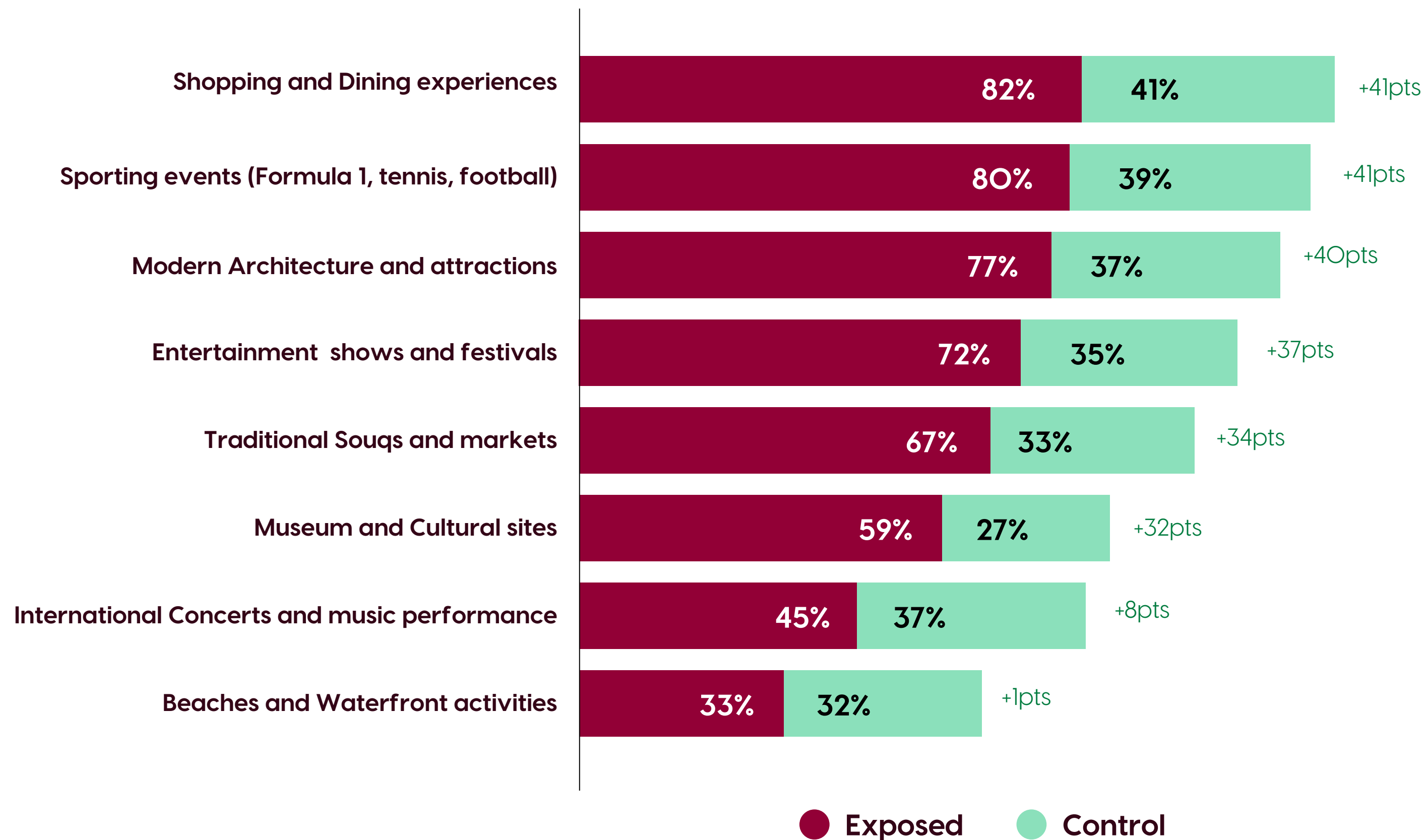
LIFT: +12 percentage points

Findings:

Cinema advertising successfully converted neutral perceptions into positive sentiment. The dramatic decline in neutrality (-12pts) demonstrates cinema's ability to shift emotional positioning for destinations. The +11pt gain in "somewhat appealing" indicates the campaign effectively moved fence-sitters toward active consideration.

UNDERSTANDING OF QATAR'S OFFERINGS

Question: "What do you know Qatar offers for visitors? Select all that apply"



Average lift: +29pts across all categories

Findings:

Cinema advertising significantly expanded destination associations across most attraction categories. The campaign was particularly effective at communicating:

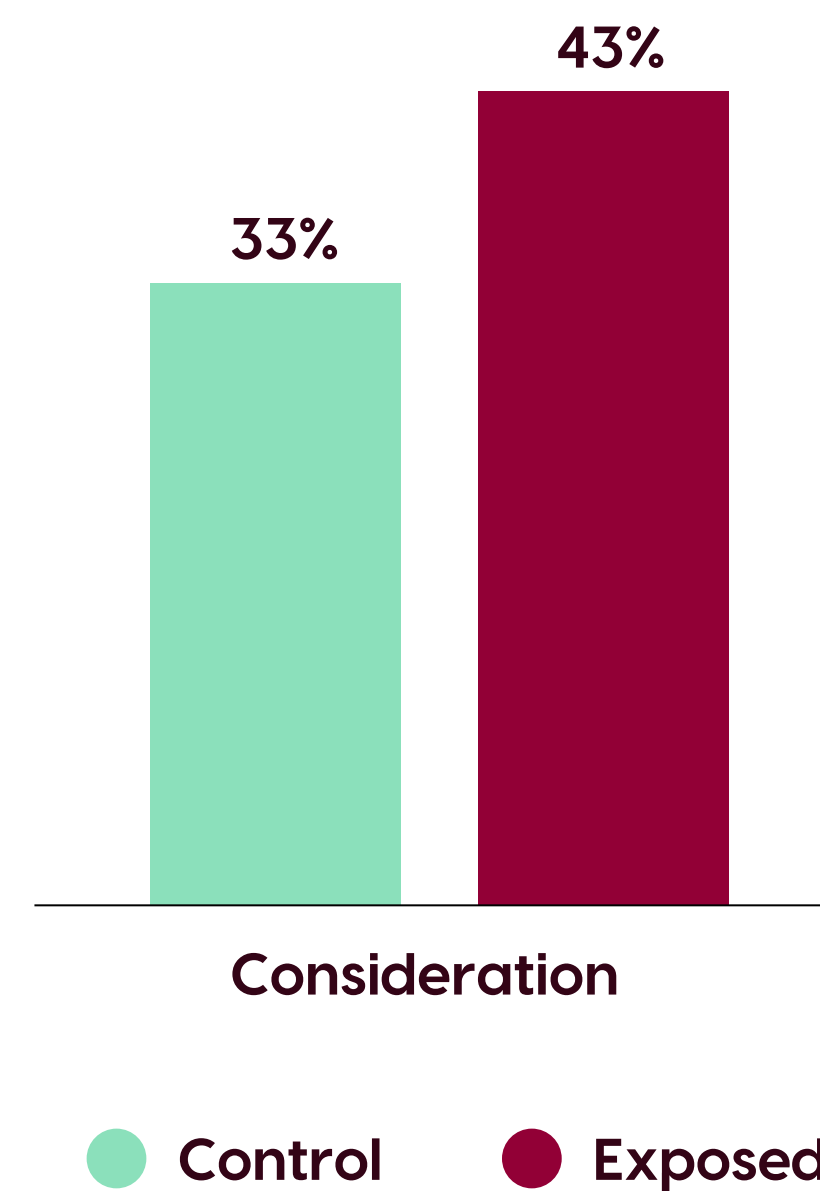
Highest Lifts:

- Shopping and dining experiences: +41pts.
- Major sporting events: +41pts.
- Modern architecture: +40pts · Entertainment shows and festivals: +37pts.

QATAR CONSIDERATION

Which of these destinations would you consider visiting for a short trip or weekend break in the next 12 months?

Qatar Consideration vs Turkey, Dubai, Abu Dhabi, Bahrain, Oman, Egypt.



LIFT: +10 percentage points

Findings:

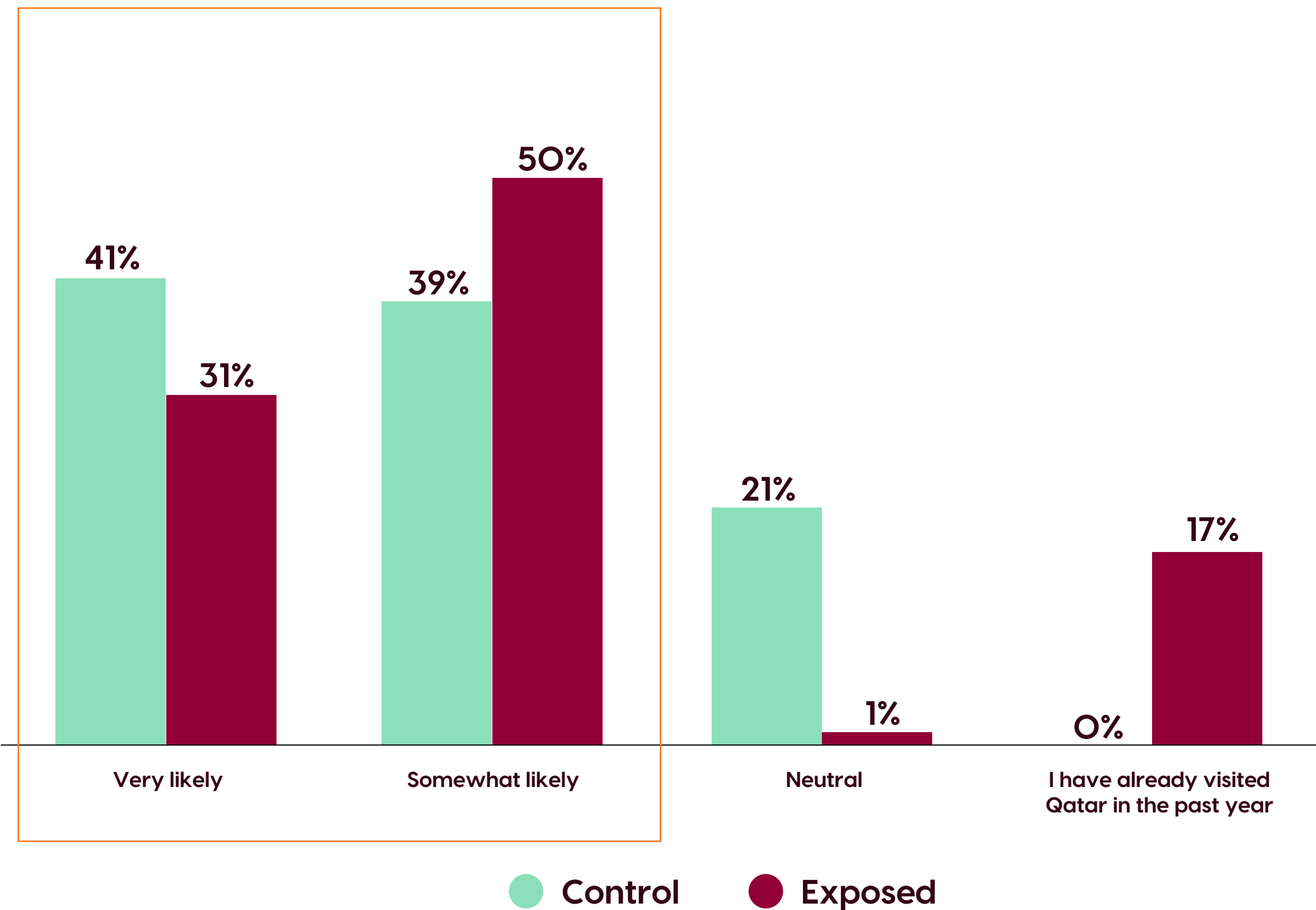
- Cinema advertising drove +10pts consideration lift among KSA travelers evaluating weekend/short-trip destinations.
- This positions Qatar ahead of key regional competitors, demonstrating cinema's ability to maintain competitive advantage in a crowded destination market.

Qatar leads consideration by significant margins:

- +17pts vs. Turkey.
- +22pts vs. Dubai.
- +26pts vs. Abu Dhabi.

VISIT INTENT & BOOKING PROPENSITY

Question: "How likely are you to visit Qatar in the next 12 months?"



Findings:

Visit intent showed minimal T2B lift (+1pt: 80% → 81%), but the data reveals significant behavioral shifts:

1. **Neutrality collapse:** 21% → 1% (-20pts).

Cinema eliminated fence-sitters, forcing travelers to make a decision.

2. **Intent redistribution:** "Very likely" decreased from 41% → 31% (-10pts).

- "Somewhat likely" increased from 39% → 50% (+11pts).

- Net effect: +1pt overall.

3. **Recent conversion:** 17% of exposed group visited Qatar in past year

This suggests potential cinema-driven activation of existing consideration.

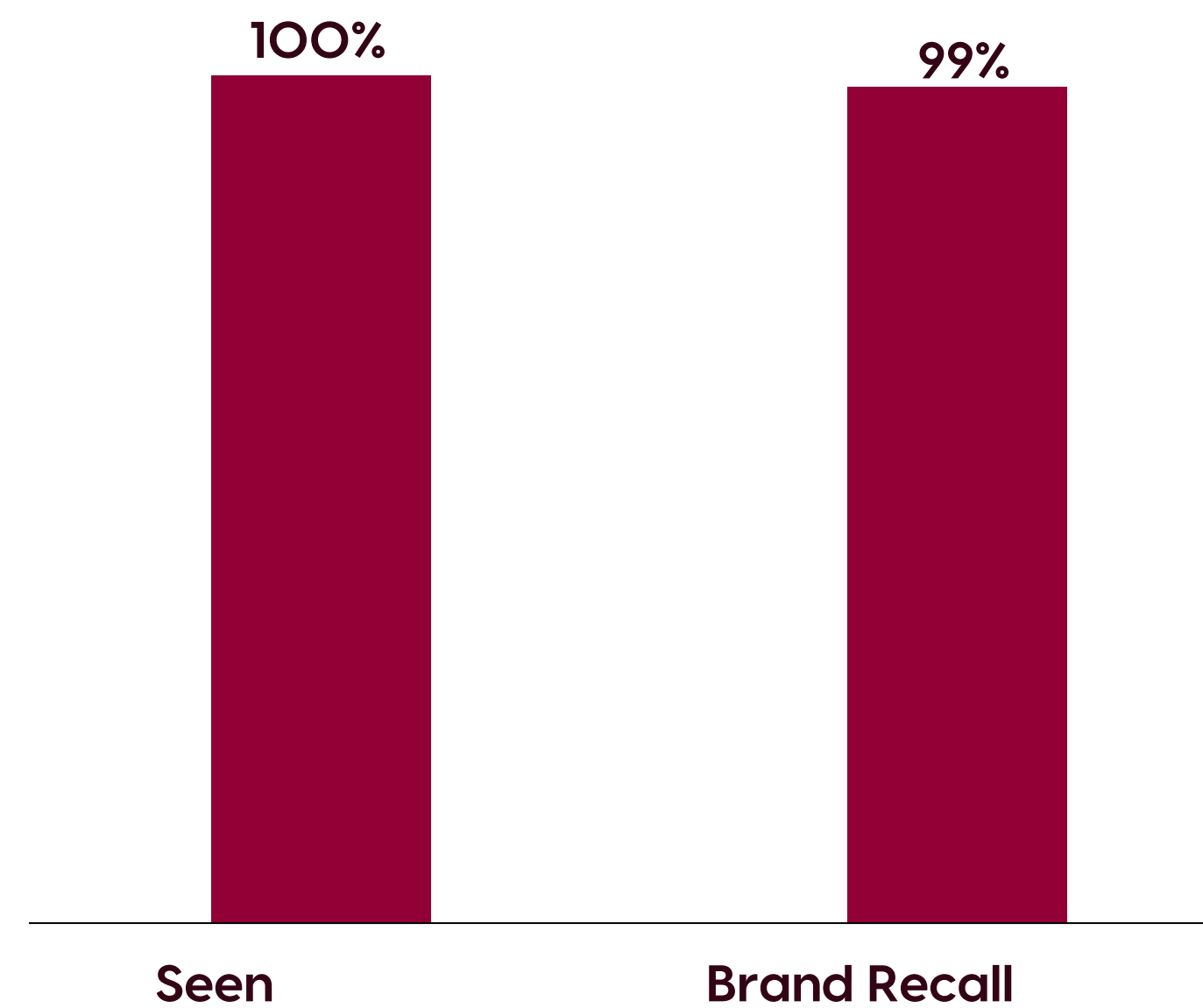
4. **High baseline:** 80% of control group already likely to visit Ceiling effect limits additional lift potential.

Interpretation:

The +1pt T2B lift understates cinema's impact. The dramatic neutrality reduction (-20pts) shows cinema forced decision-making among fence-sitters. Combined with 17% recent visitors in exposed group, this suggests cinema activates existing consideration rather than just creating awareness.

This is typical for established, familiar destinations where the advertising challenge is activation (moving from "I should go" to "I'm booking") rather than awareness creation.

AD RECOGNITION & RECALL



Findings:

However, once prompted, ad recognition is universal, reflected in 100% seen and 99% brand recall. This suggests strong visual recognition and branding cues. But limited memorability without stimulus.

- Q4: Ad Recognition (shown masked ad).
- Q5: Brand Identification (which brand?).

LIFT SUMMARY- ALL PRIMARY METRICS

Primary KPI Performance Summary:

Primary KPI	Control	Exposed	Lift
Destination Appeal (T28)	77%	89%	+12pts
Destination Consideration	33%	43%	+10pts
Visit Intent (T2B)	80%	81%	+1pts
Ad Recognition (Aided)	0%	100%	+100pts
Brand Identification	0%	99%	+99pts

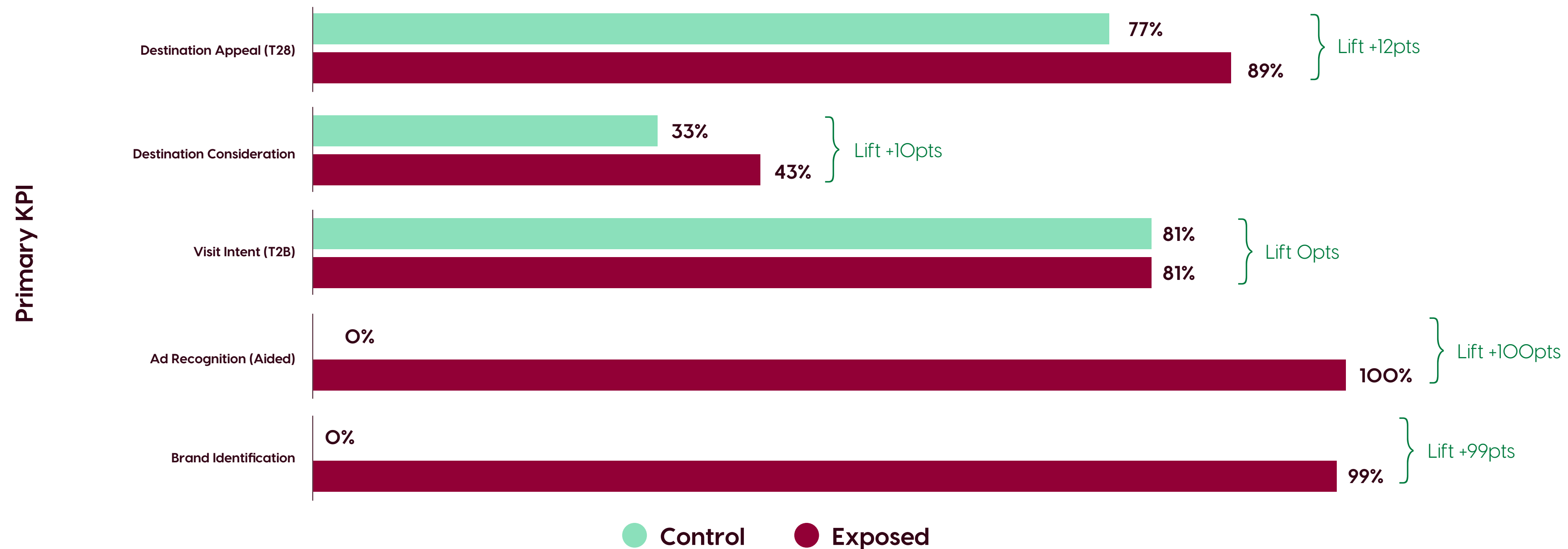
Findings:

Cinema advertising drove statistically significant and substantial lifts across key destination metrics:

- Destination Appeal: +12pts - Successfully shifted perceptions from neutral to positive.
- Destination Consideration: +10pts - Moved Qatar into active travel planning set.
- Visit Intent: +1pts - High baseline (80%) created ceiling effect.
- Campaign Visibility: Perfect recognition (100%) and attribution (99%).

LIFT SUMMARY- ALL PRIMARY METRICS

Primary KPI Performance Summary:



Findings:

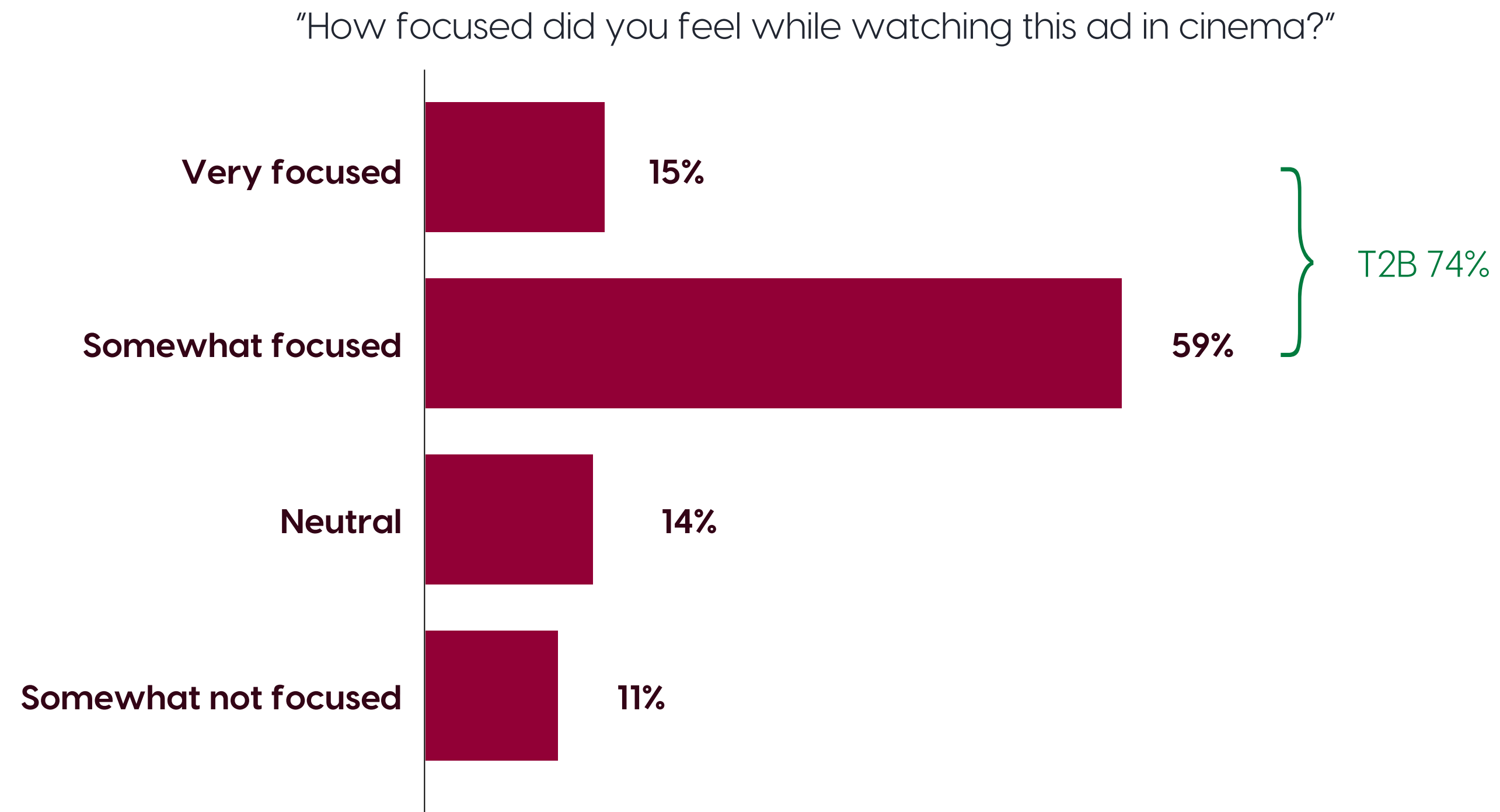
Cinema advertising drove statistically significant and substantial lifts across key destination metrics:

- Destination Appeal: +12pts - Successfully shifted perceptions from neutral to positive.
- Destination Consideration: +10pts - Moved Qatar into active travel planning set.
- Visit Intent: +1pts - High baseline (80%) created ceiling effect.
- Campaign Visibility: Perfect recognition (100%) and attribution (99%).

DIAGNOSTIC METRICS

ATTENTION/FOCUS

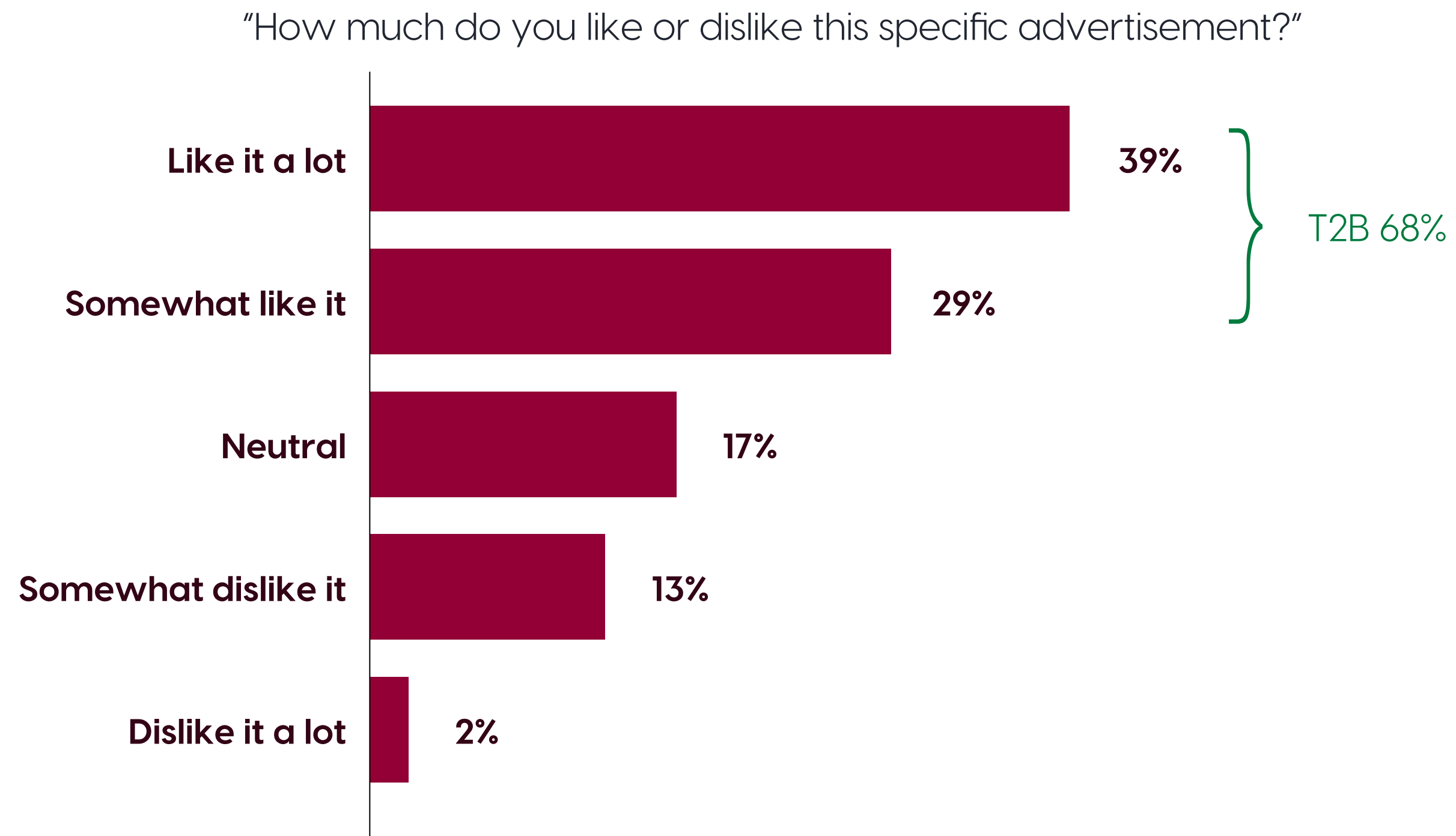
Asked only to exposed group who recognized ad.



Cinema delivered 74% attention (T2B), positioning it as a high-attention medium for destination messaging. This attention level is significantly higher than digital display (11-29%) and competitive with TV (43%), making cinema particularly effective for visually-driven destination advertising that requires sustained viewer engagement.

AD LIKEABILITY

Asked only to exposed group who recognized ad.

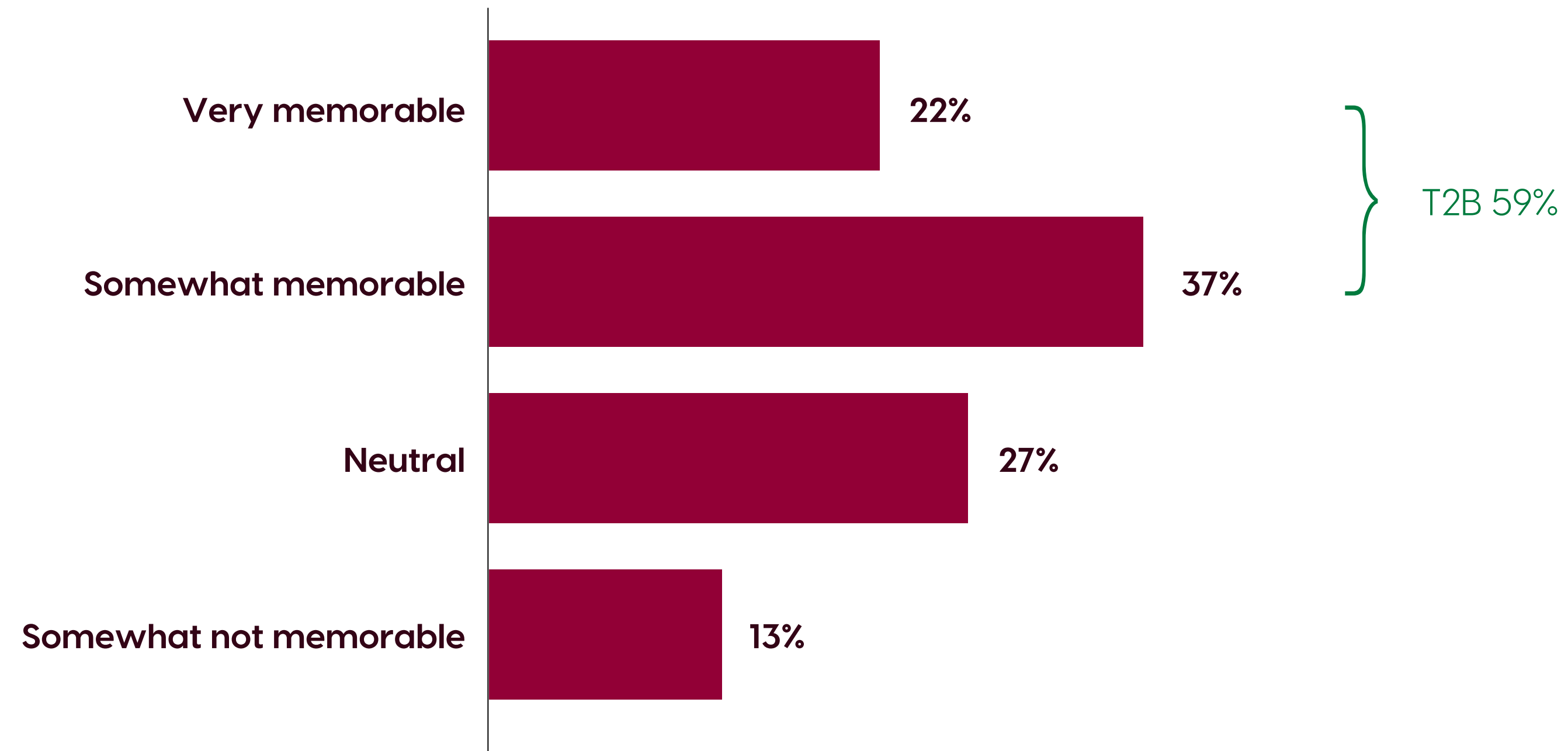


68% of exposed viewers liked the Qatar Tourism advertisement, with only 15% expressing any level of dislike. This positive reception indicates the creative execution resonated well with the target audience and supports the appeal (+12pts) and consideration (+10pts) lifts observed in primary metrics.

MEMORABILITY

Asked only to exposed group who recognized ad.

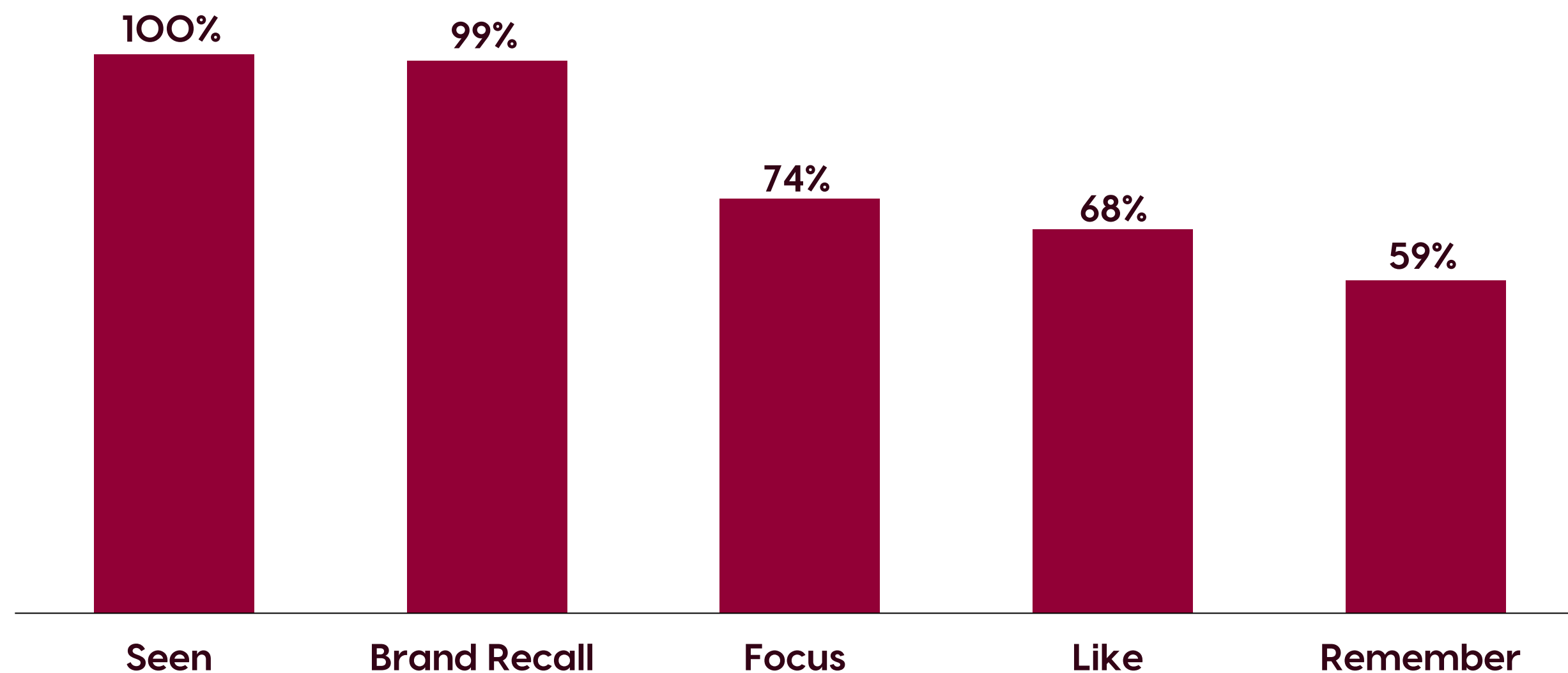
"To what extent did watching this ad in cinema affect how well you remember it?"



59% found the Qatar Tourism ad memorable in the cinema environment. Combined with 74% attention and 68% likeability, these diagnostic metrics demonstrate that cinema provided a receptive environment for destination messaging, though there is opportunity to enhance memorability through creative optimization (e.g., stronger storytelling, more distinctive visual hooks, or improved closing brand moment).

CINEMA ENVIRONMENT IMPACT

Ad Performance in Cinema Context:



Cinema Advantage:

- No ad skipping.
- No multitasking.
- Large screen format.
- Premium sound.
- Emotionally receptive audience (entertainment mindset).

DESTINATION-SPECIFIC BENEFITS:

Longer ad formats allow destination storytelling.

- High-quality environment matches premium destination positioning.
- Affluent, travel-active audience demographic.
- Group viewing creates social validation.

Findings:

The combination of high attention, perfect visibility, and lean-back viewing mindset makes cinema particularly effective for emotionally-driven destination marketing.

INSIGHTS & RECOMMENDATIONS

STRATEGIC RECOMMENDATIONS

Immediate Actions:

Maintain Cinema as Core Media Channel

- Results validate cinema as effective channel.
- Recommendation: Continue cinema investment in KSA market with optimized creative rotation.

Rationale: Results demonstrate cinema's effectiveness for destination marketing in competitive regional travel market.

Scale to Broader Reach

- Current: 5 premium cinemas.
- Opportunity: 15+ additional KSA locations tested as control.
- Projected impact: +30pt lift across broader audience.

Rationale: Replicate success across broader cinema-going population.

Leverage Results in Sales Enablement

- 43% consideration among exposed cinema-goers
- Action: Share cinema campaign results with travel agents, tour operators, and OTAs to support trade marketing efforts.

Benefit: Demonstrates consumer pull to drive trade push.

Strategic Considerations:

Optimize for Destination Storytelling

- Success formula: Visual showcase of Qatar's diversity, high-attention format
- Application: Develop creative specifically for cinema's strengths (longer formats, cinematic quality, sound design).
- Recommendation: Create destination anthology series for cinema showcasing different experiences/seasons.

Integrate with Digital Ecosystem

- Cinema delivered: 100% visibility and 68% likeability
- Multi-channel data: Q9 (media touchpoints) shows exposure patterns across channels.
- Recommendation: Use cinema as anchor medium, retarget cinema audiences with digital display and social media to drive conversion.

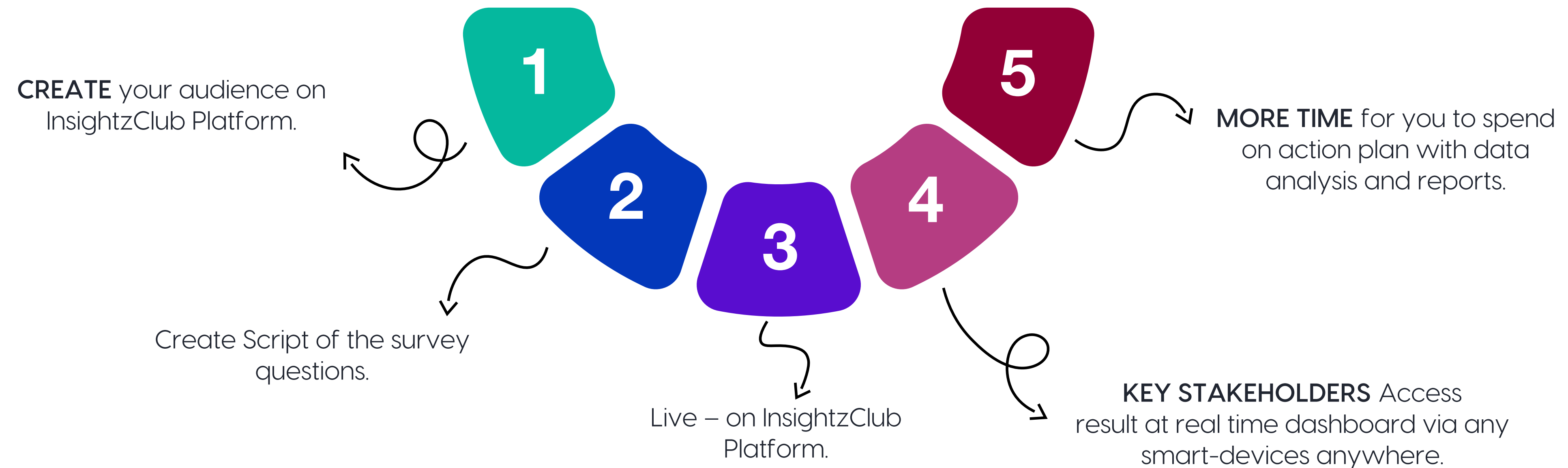
APPENDIX

SURVEY METHODOLOGY

Survey of 300 respondents was executed on the InsightzClub Platform.

InsightzClub is a marketing technology platform that delivers highly personalized insights for marketing by integrating & analyzing data from multiple sources.

Data Collection Process on the platform.



DATA SOURCES

Panel Company

First Party Active Source.

Integrating with API to run surveys:

- Monetize their database.
- Reduce project management.

Affinity: Ecommerce, Retail Channels, Telcos, Etc

Users behind CRM system.

Integrating with API to run surveys:

- Enrich existing database.
- CRM activity/engagement.
- Revenue monetization.

ICZ Mobile App

InsightzClub mobile app.

Passive data collection –
Behavioural as well as transactional.

SURVEY RESPONDENTS

Pre-Targeting Based on Actual Behaviour Vis-À-Vis Claimed

Demographic



Targeting consumers based on their demographics, eg. Age, gender, income.

Location Data



Access of Location-based data.

Appographic Data



Based on user's interest in various segments based on apps downloaded.

User Intent /Preferences



Categories of ads users have engaged with over a period of time across various platforms.

Technographic Data



Eg. Device type, OS, Model, language, telco used.

Thank You