

WhipFLASH Webinar

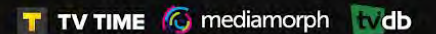
*Defining the New Normal for Theatrical Releases:
Opportunities for Rights Holders and Distributors*



Paul Hastings

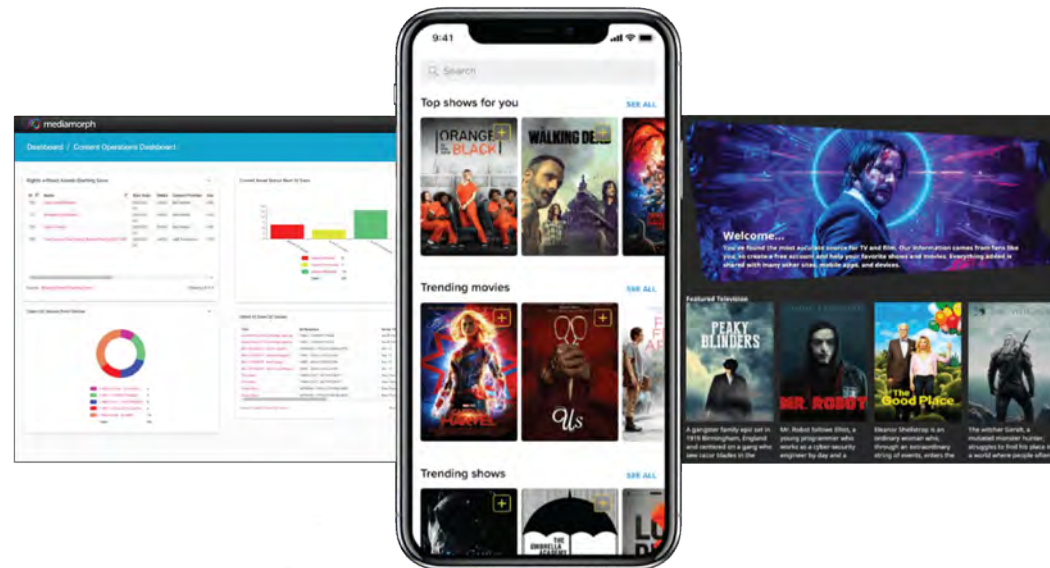
Senior Vice President Sales, EMEA
Whip Media Group

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Has the Movie Business Changed Forever?

The Unimaginable: The Night the Lights Went Dark on Cinema Marquees



"Leading U.K. cinemas chains Cineworld, Odeon, Picturehouse, Vue and Curzon have announced they are closing theaters in response to the coronavirus outbreak."

"Cinemas in England can reopen from 4 July, the government has confirmed - although many will not be ready to do so by that date"



In Response: Acceleration of PVOD

Straight-to-streaming experimentation of the in-home cinema experience



Cinema Admissions Were Already Under Pressure

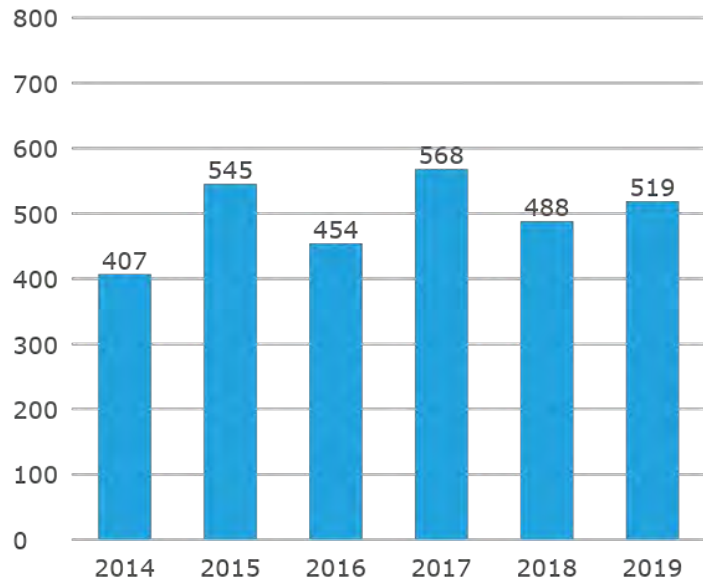
Some Rights Holders questioning the exclusive cinema first window



Admissions by Year (in millions)*

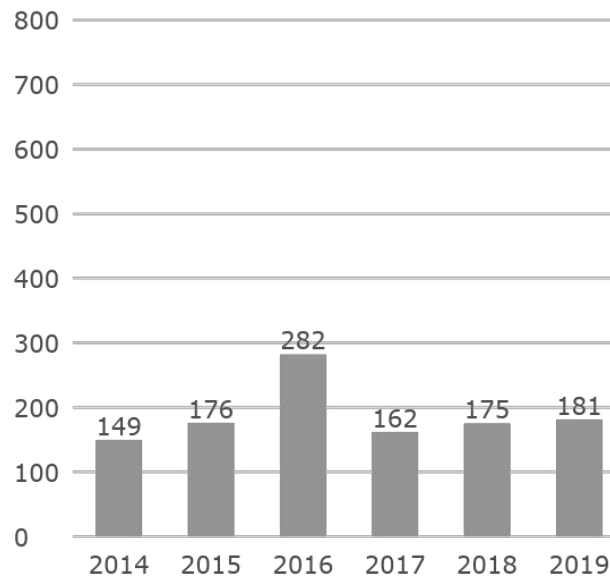
Budget > \$100M

This has been the largest growth segment at the box office



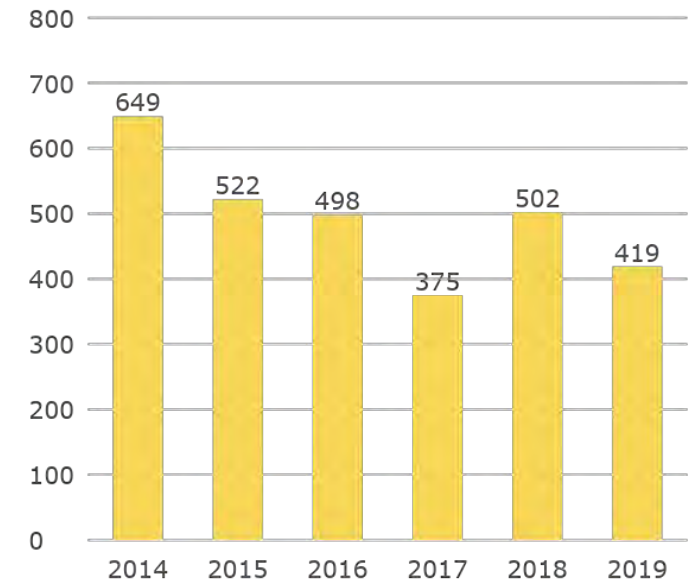
Animation

With the exception of 2016, admissions have held steady over the past six years.



Everything Else

This includes comedies, dramas, horror films, action/thrillers, documentaries, live-action family



*2020 Study by United Talent Agency



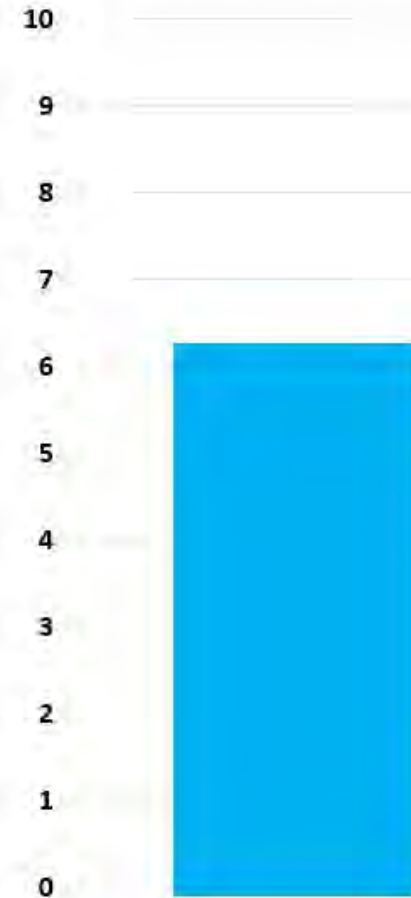
While Cinema's are working toward and promoting a "COVID-19 Compliant" environment...What is the "new normal" sentiment toward the cinema and PVOD experience?

COVID-19 Has Not Quelled Audience Interest

We miss going to the cinema



How much do you miss being able to go to the cinema? (0-10)

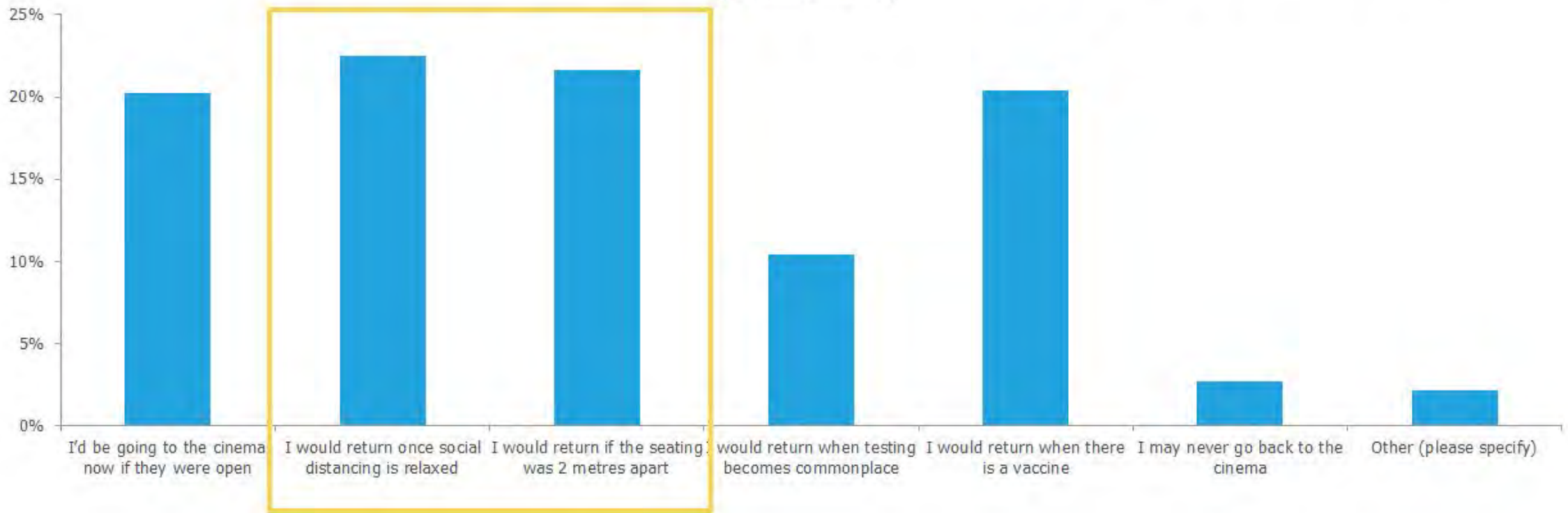


Audiences Will Return to the Cinema

Creating a social distancing environment is critical



Which of the following statements BEST reflects your desire to go back to the cinema?
(Choose one)



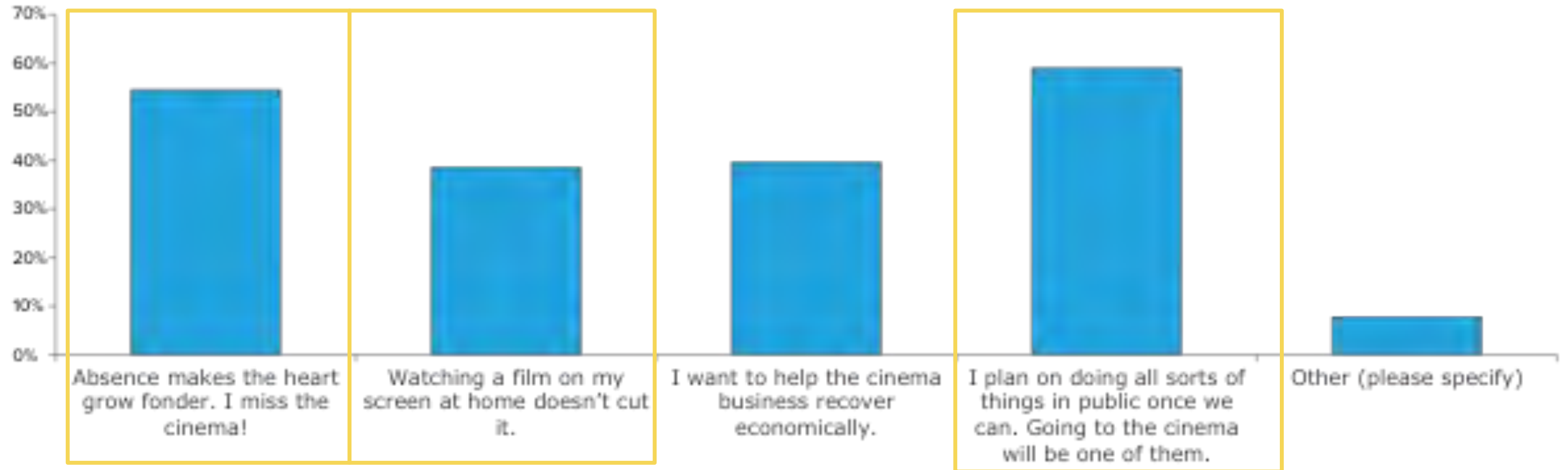
44%

The Cinema Experience Is Part of Our Social Fabric

The "New Normal" is getting back to normal



You said you think you will go to the cinema more often than you did before COVID-19. Why is that? (Select all that apply)

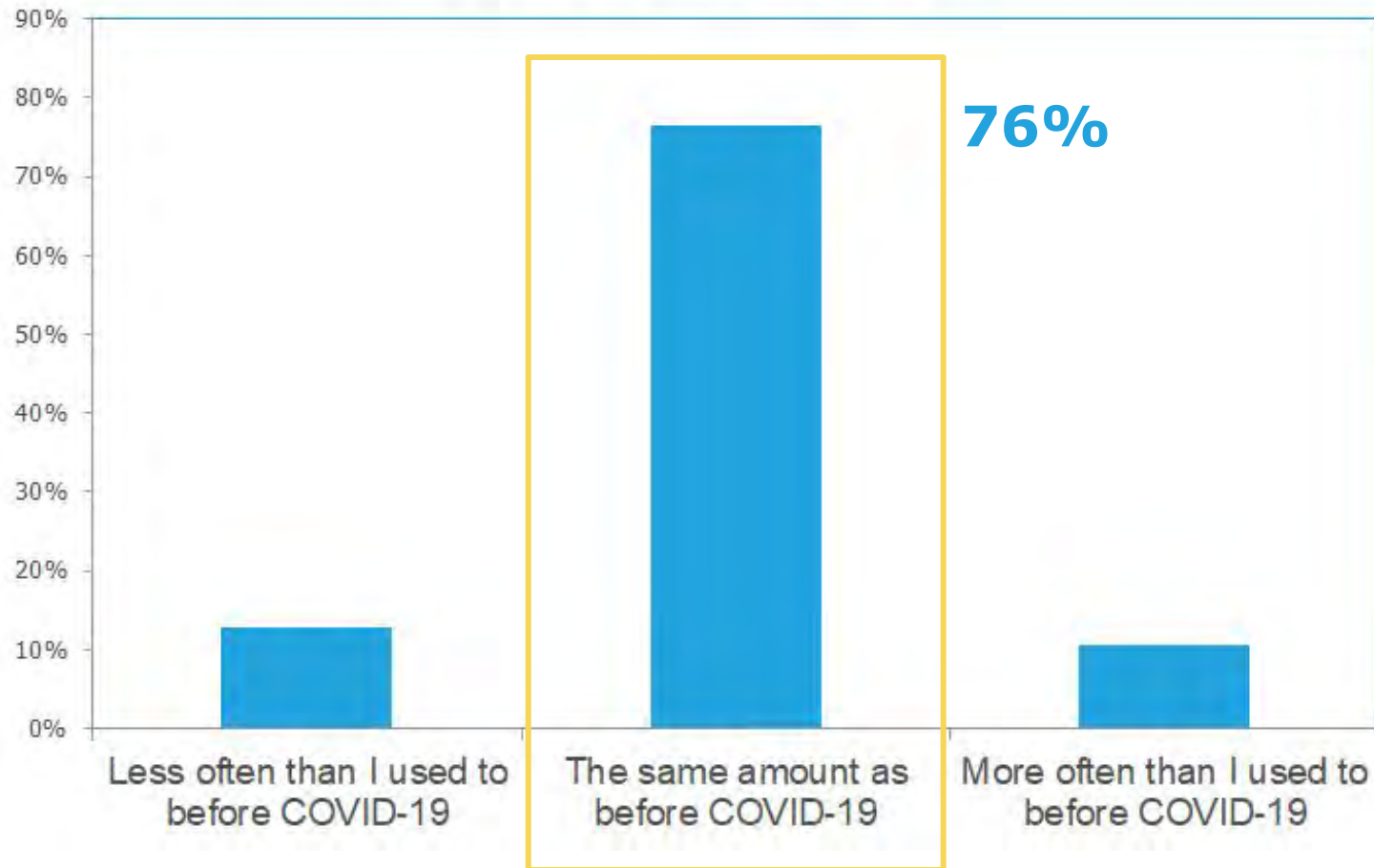


Majority Will Attend At the Same Level

Reinforces the value of the cinema experience



Once I feel comfortable returning to the cinema,
I can see myself going...



Pre-COVID, How often did you attend the cinema?

- >21% once a week
- 20% once a month
- 34% few times a year
- < 15% once a year/never

For the “Nevers”, It’s Less About Health

Cost and streaming availability dominate



You said you might not ever go back to the cinema. Why is that?
(Select all that apply)

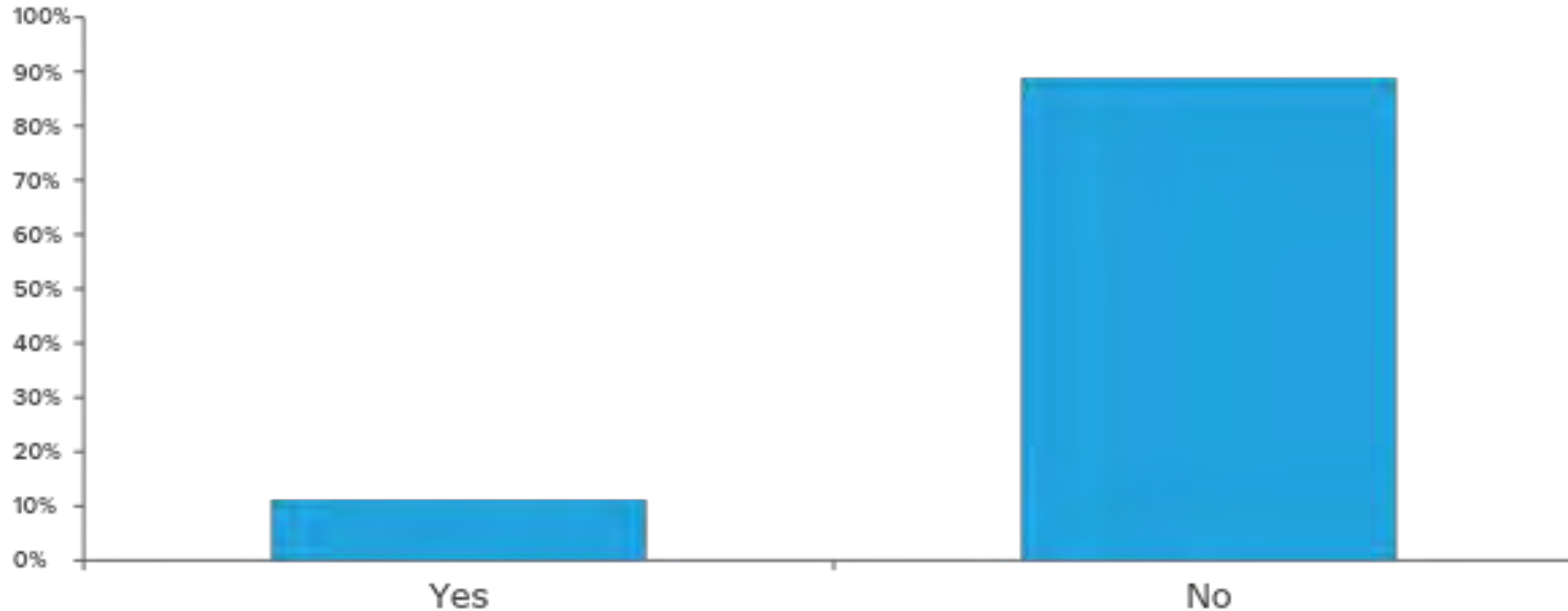


PVOD: The Beginning of a Trend?

Titles and marketing could push the demand



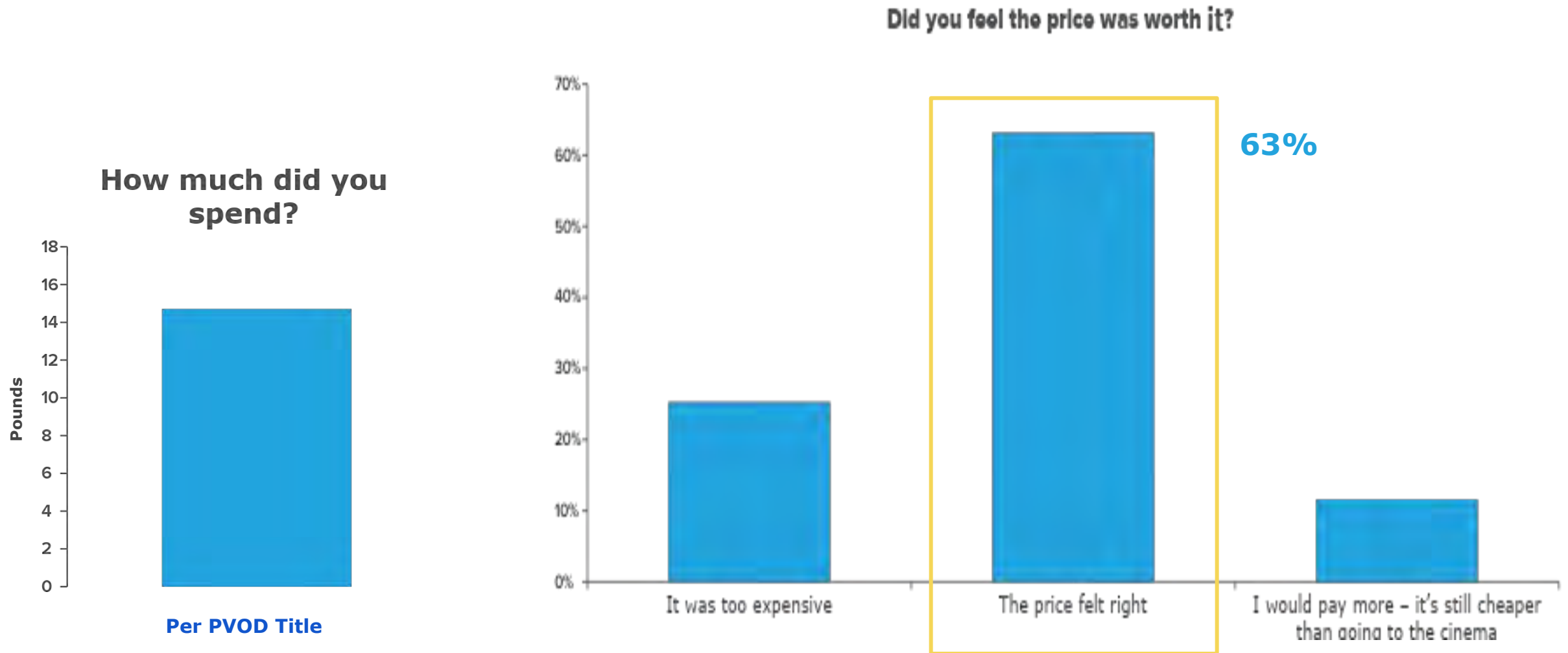
More and more, films that were going to be shown in the cinema are going straight to streaming services as premium Video-On-Demand. Many are being initially offered for £16. Have you purchased any of these films since these 'stay at home' measures?



PVOD Price Seems Fairly Valued



Consumers don't seem to factor in the "popcorn & babysitting price" when in-home

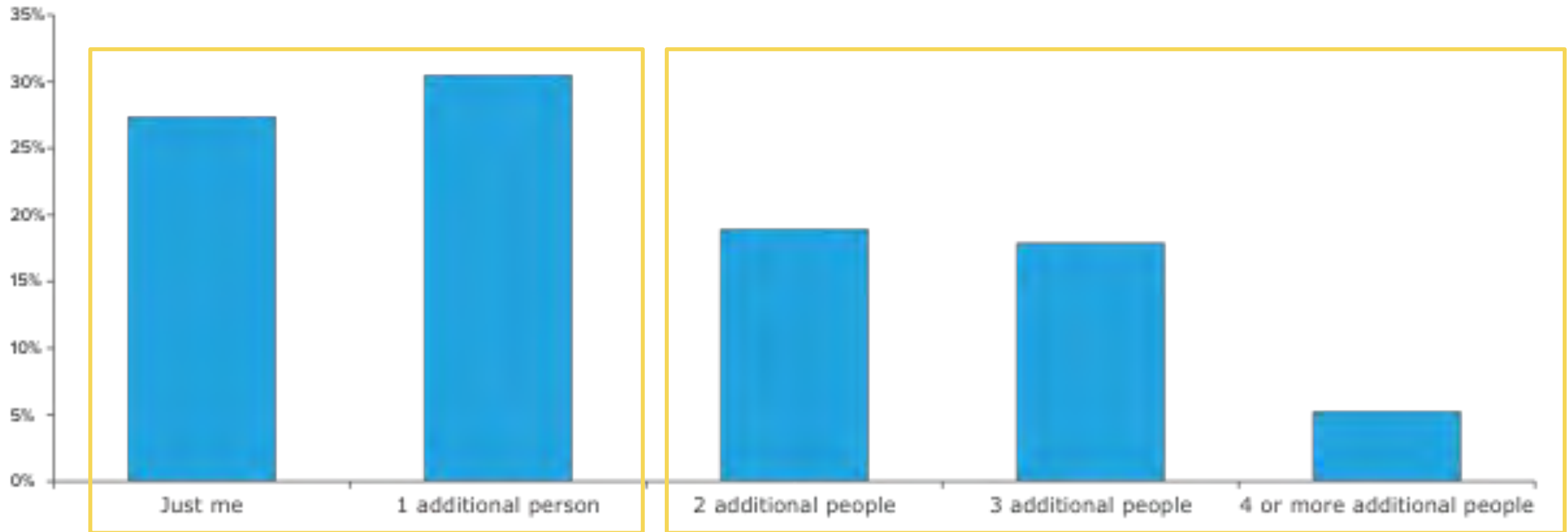


Generational Skew To Purchase

Families may be less inclined to PVOD without the draw of a family-friendly title



How many people did you watch with?



58%

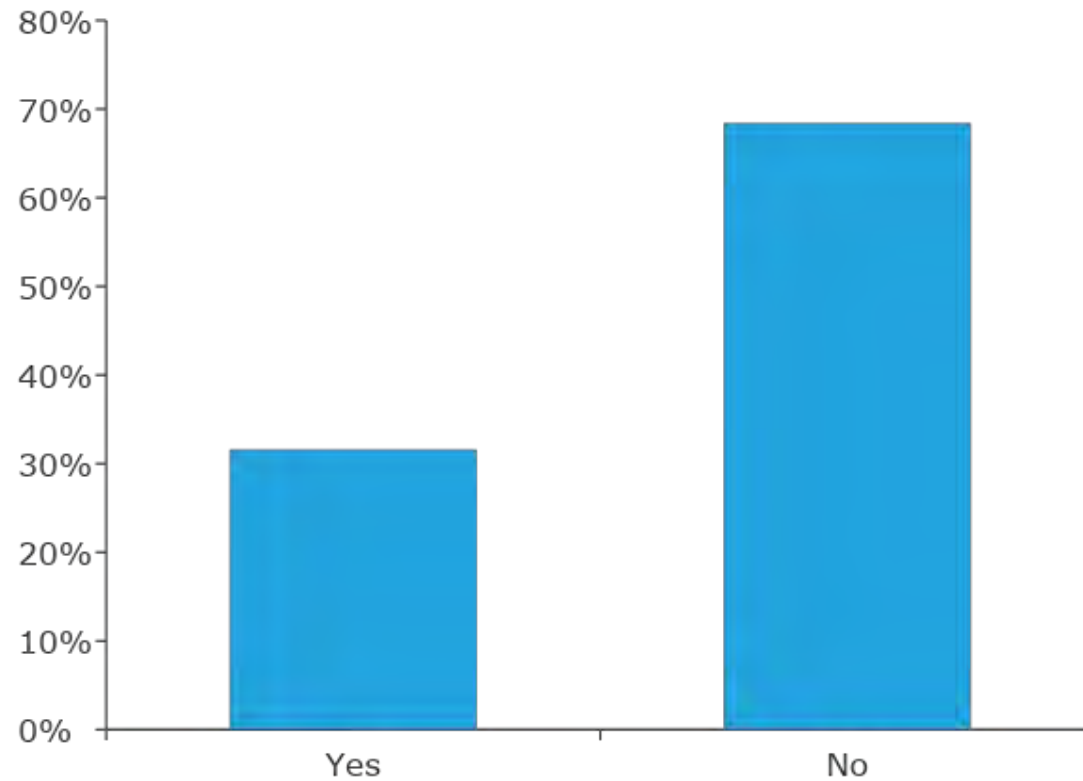
42%

Viewing Behavior Impacted by Generation

Limited viewing window lends itself to one-time/time-restricted use



Did you watch the film more than once?

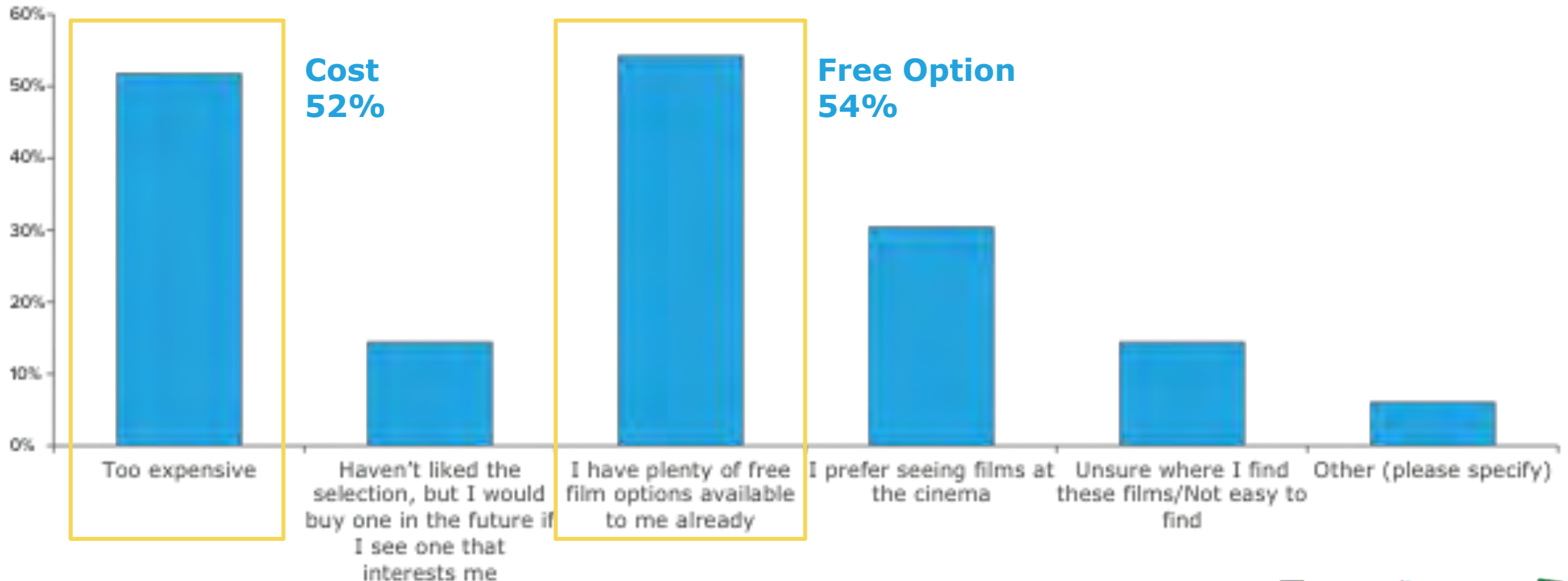


PVOD Barriers Are Expense and Free Options...

Or audiences may not fully understand that PVOD is not TVOD/SVOD content

Among those who had not purchased

Why haven't you purchased any premium Video-On-Demand films?
(Select all that apply)



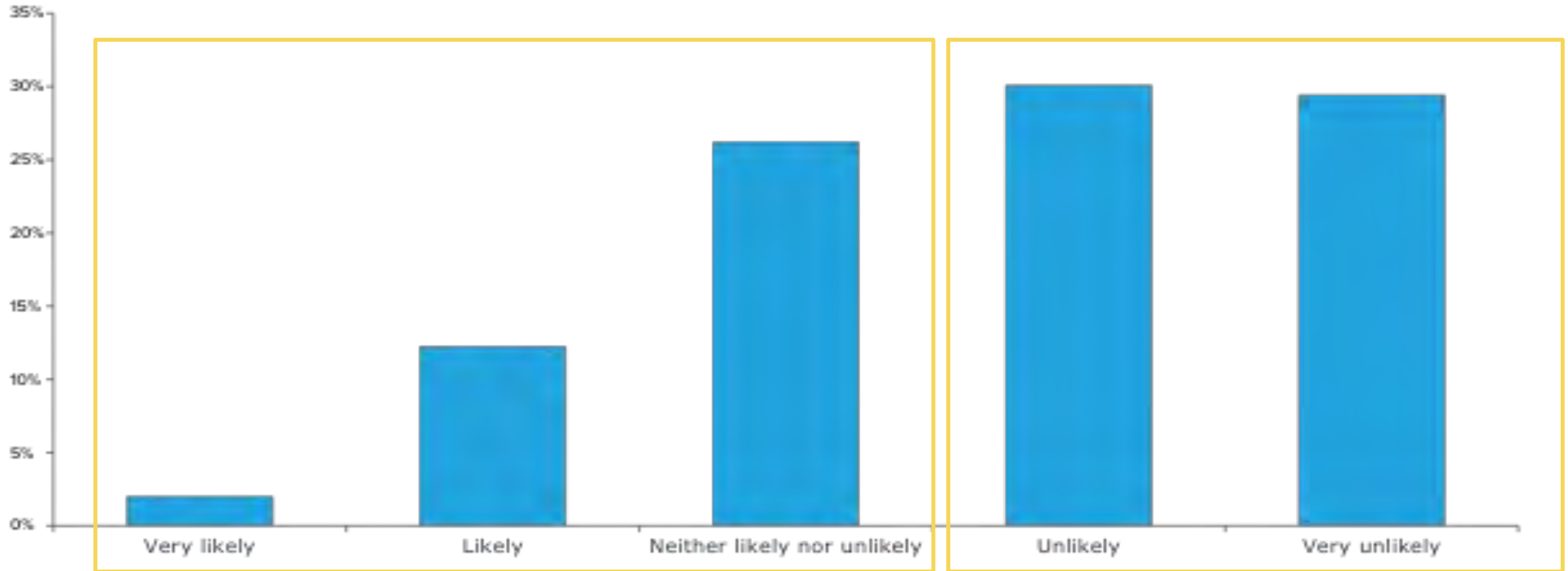
The Door is Open for PVOD

Audiences need to understand value & positioning (coexistence) vis-a-vis Cinema



Among those who had not purchased

How likely are you to purchase one in the future?



40%

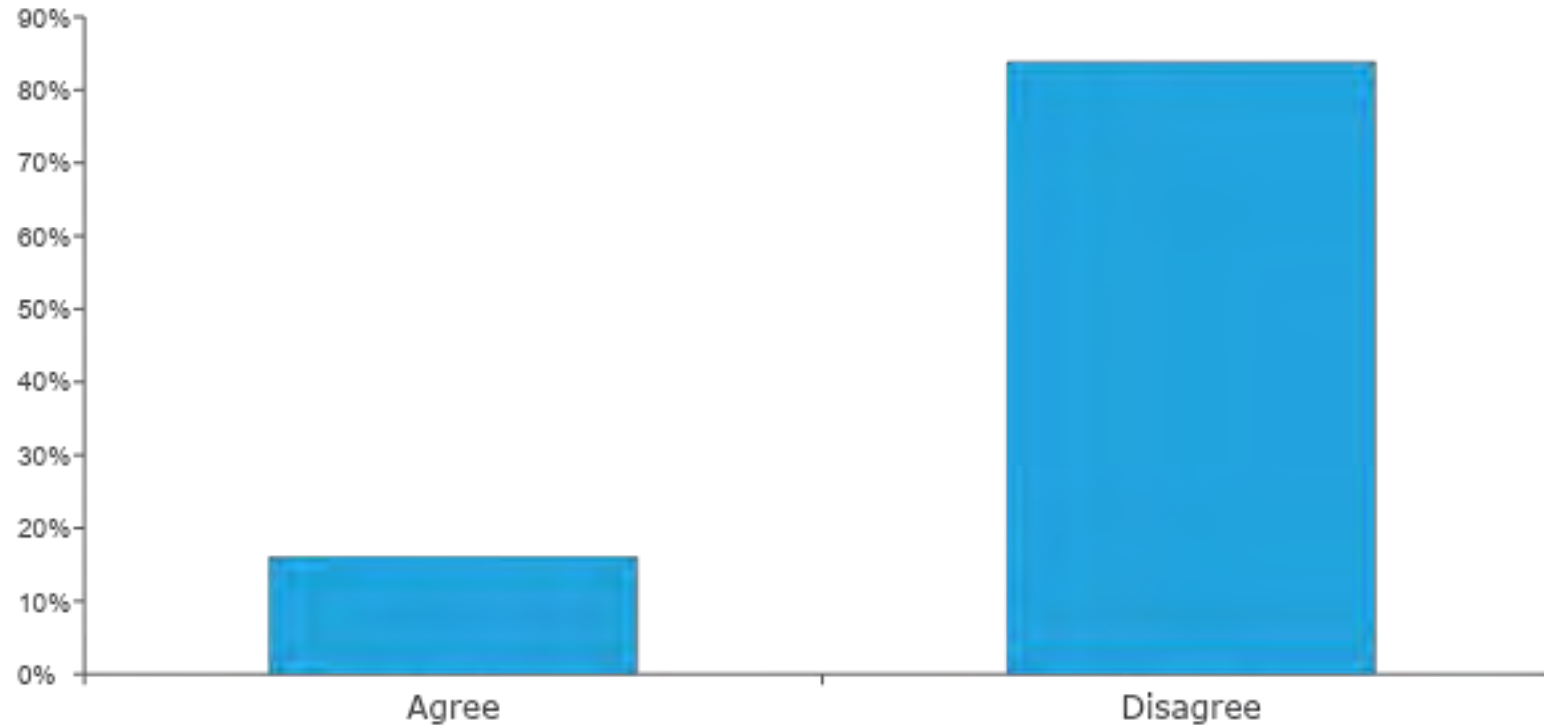
59%

Audiences Want to Return to the Cinema

4K/UHD TV in-home screen and convenience can't trump the big screen experience



When cinemas reopen, I am more likely to watch a film in-home for a price of £16, if available, versus paying to watch the film on the big screen at the cinema.



QUESTIONS?



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