

Movie Marketing Online:

Digital Marketing Strategies for Studios and Publishers

June 3, 2008

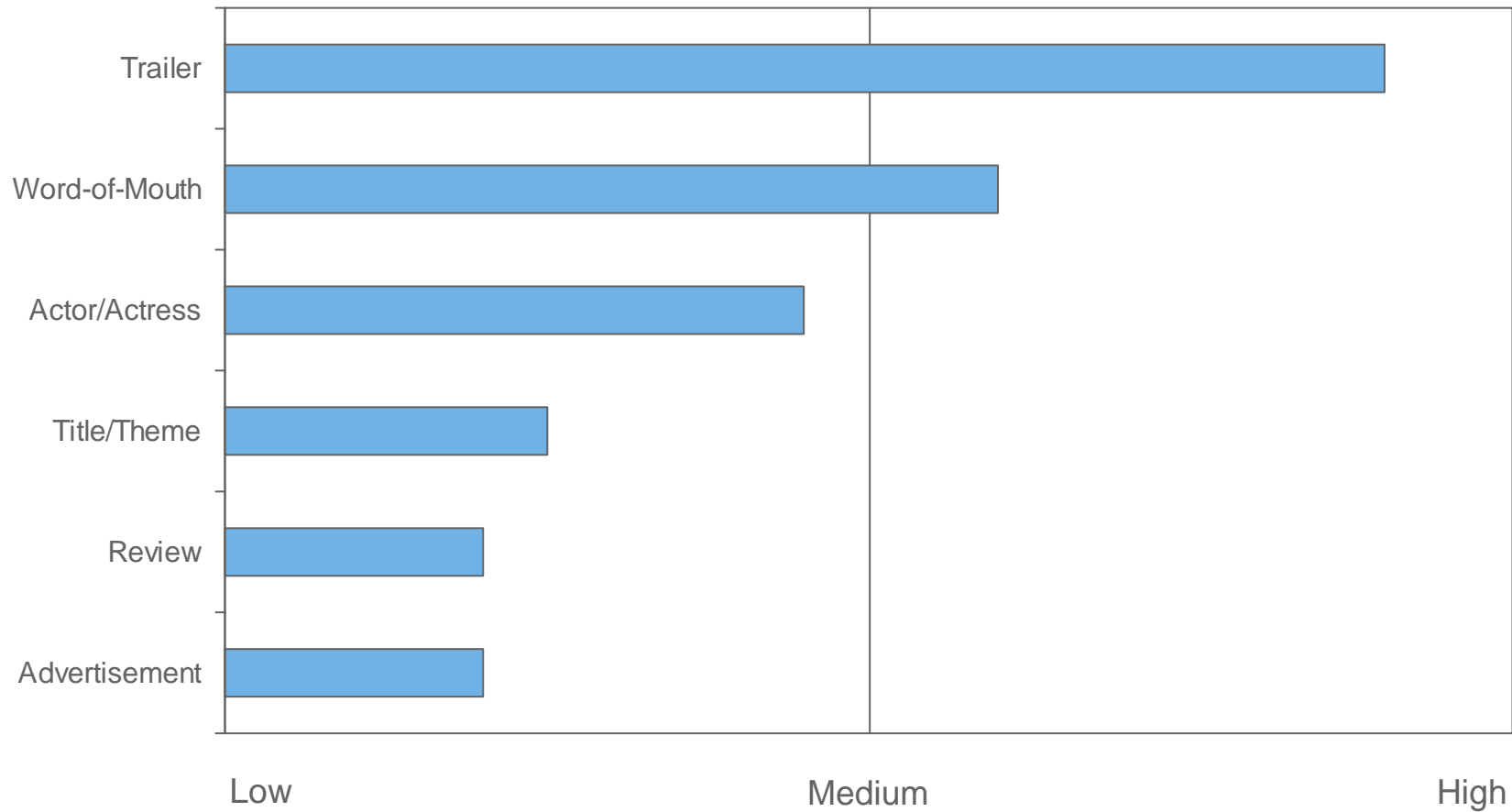
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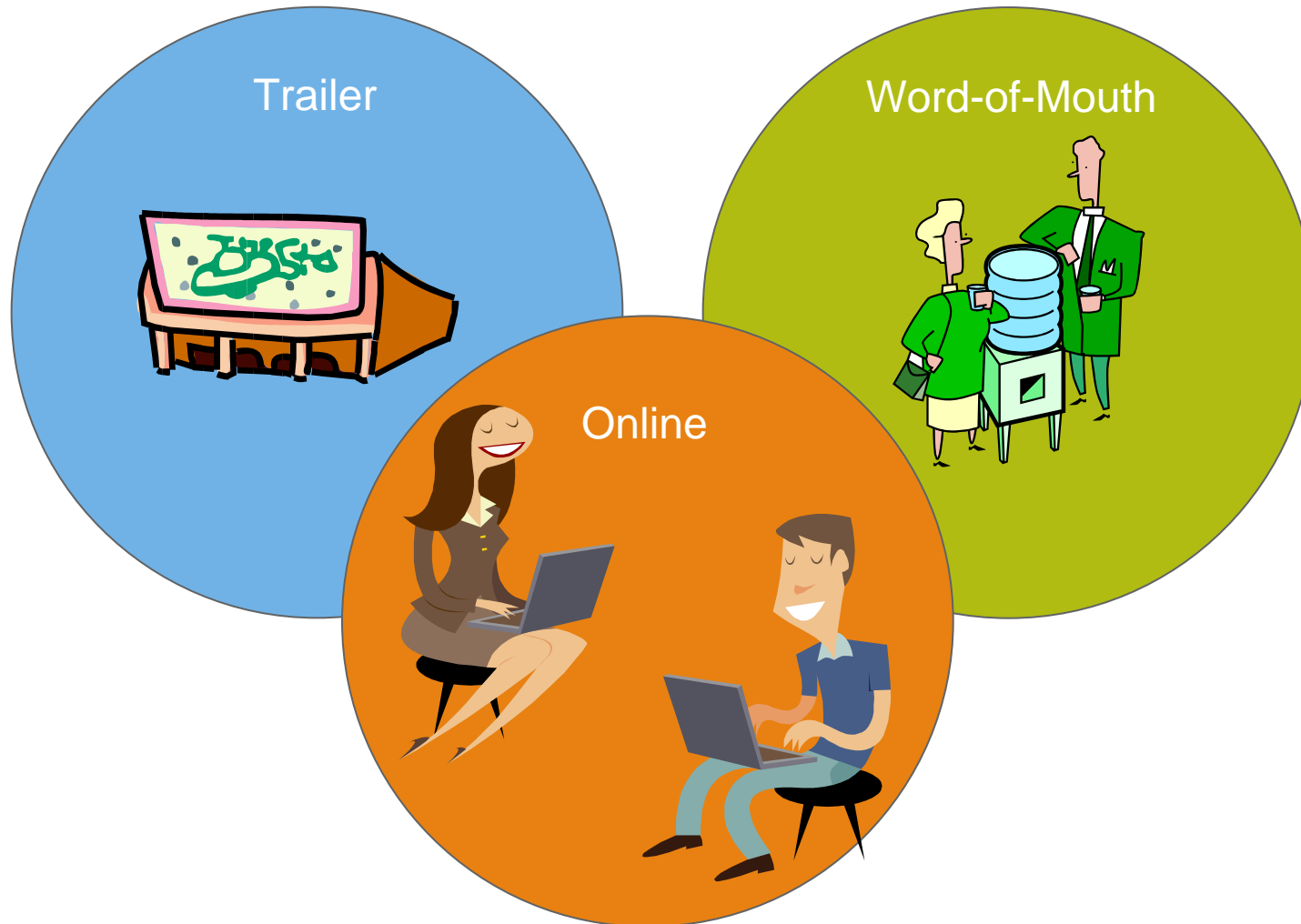
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Ranked Importance of Information Resources



Source: The Nielsen NRG American Moviegoing 2007 Study

Colliding Worlds of Information



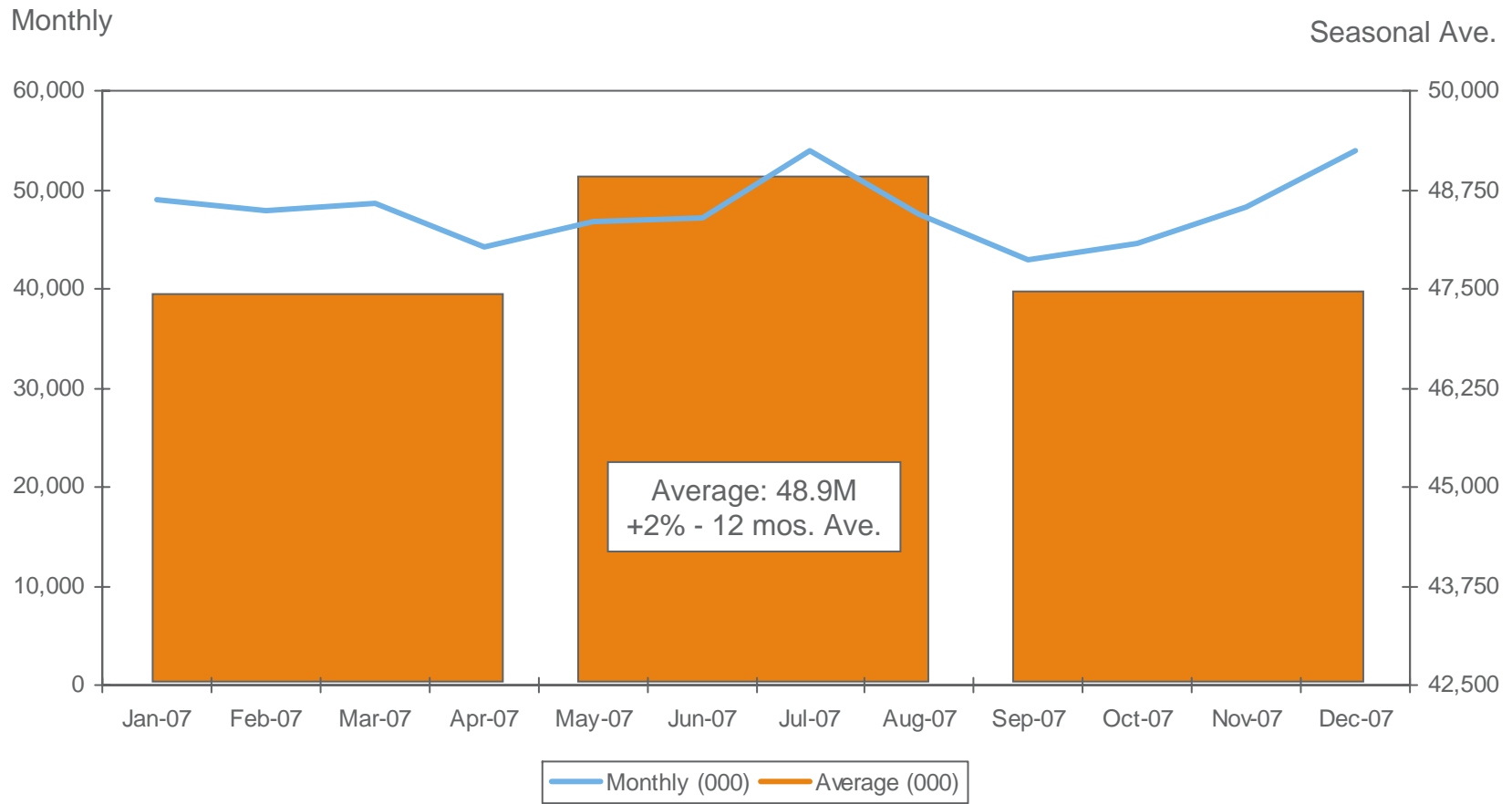
Key Questions

How can studios leverage and use this emerging space?

How can sites move into this new space?

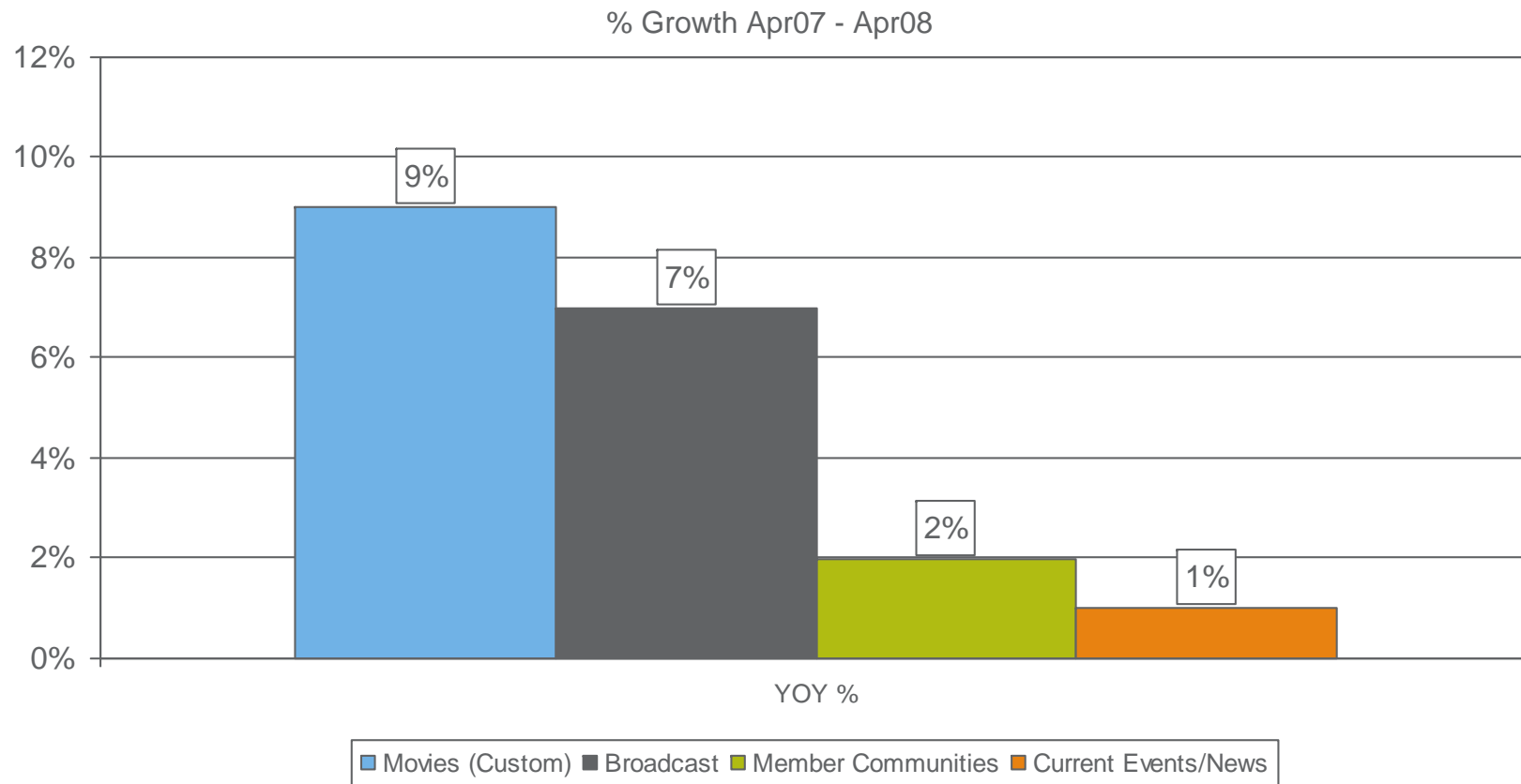
How should sites sitting in this space take advantage of this development?

The Summer Audience is There



Source: Nielsen Online custom NetView roll-up of movie focused sites

Interest in Movies Outpaces Other Content



Source: Nielsen Online NetView, % growth April 2007 compared to April 2008

Moviegoers Like Their Voices to be Heard

Site Categories	Blogged	Visited a Blog	Watched Movies/Movie Clips (Last 30 days)	Any Streaming (Last 30 days)
Community	169	150	137	128
Entertainment – TV/Movie/Celebrity	149	142	164	141
News	116	130	131	127
Sports	119	131	143	136

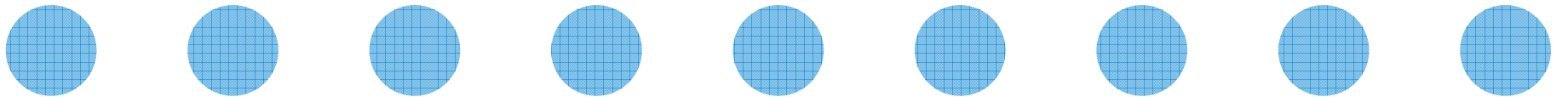
Source: Nielsen Online @Plan Summer 2008



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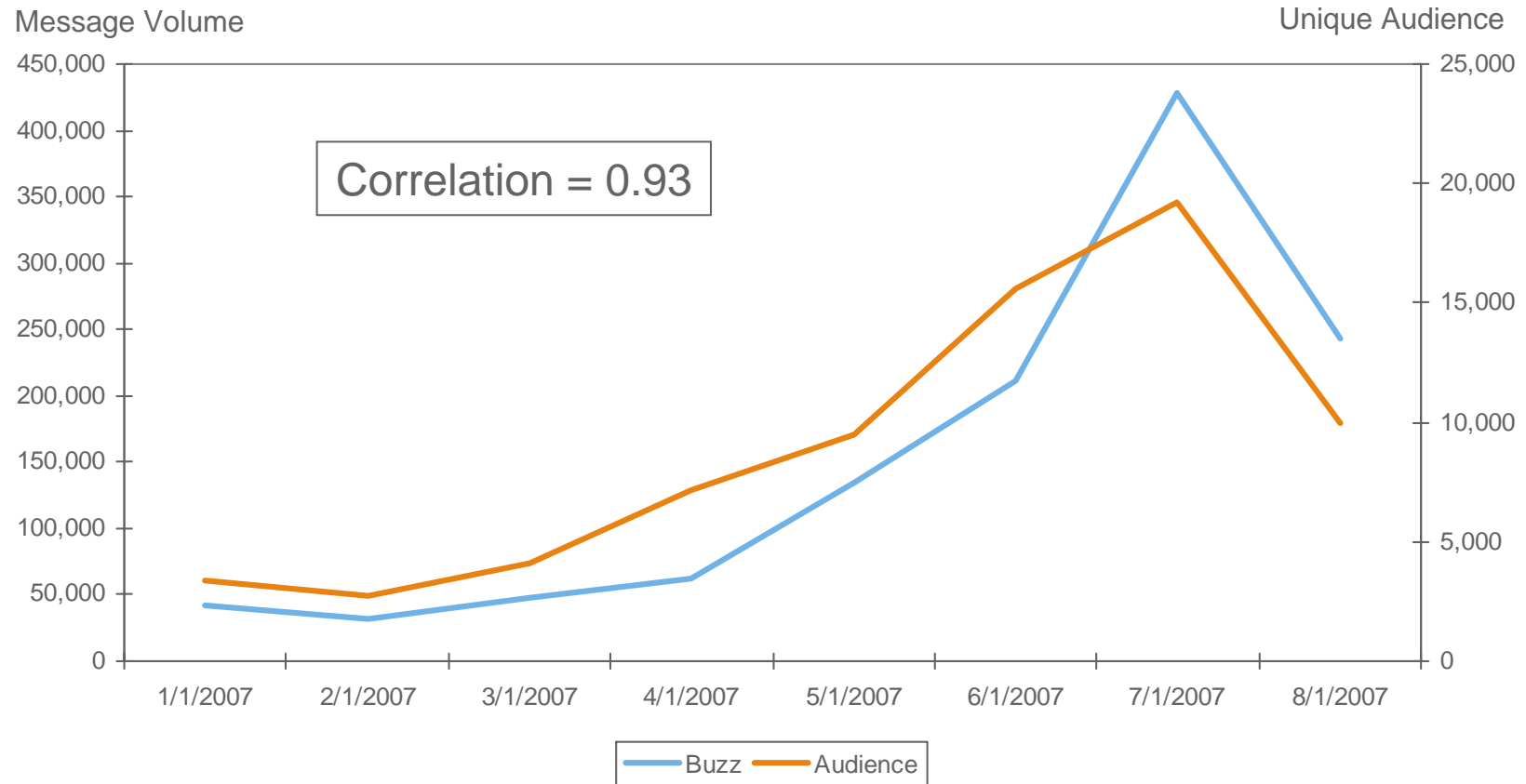
A Look at Last Summer



Approach

- 2007 Summer Big Budget Theatrical Releases
 - \$10+ M Openers
 - Wide Releases (2,000+ theaters)
- Audience (custom dictionary of trailers and sections)
 - Studio sites, Major portals and Movie-centric sites
- Discussion
 - Volume, Top blogs, Top links
- Advertising

Content Interest and Conversation are Intertwined



Source: Nielsen Online BrandPulse; messages related to Summer Blockbuster, NetView; custom definition of Summer Blockbuster across movie related sites

The Dynamics of the Discussion

Blog	% of Discussion
Cinematical	7%
The Movie Blog	5%
Defamer, LA Gossip Rag	4%
The-Leaky-Cauldron	3%
HPANA – Harry Potter News	3%
LAist	2%
Hollywood Elsewhere	2%
TVgasm	2%
The Hot Blog	2%
MovieWeb	2%

Source: Nielsen Online BrandPulse; % of discussions related to Summer Blockbuster

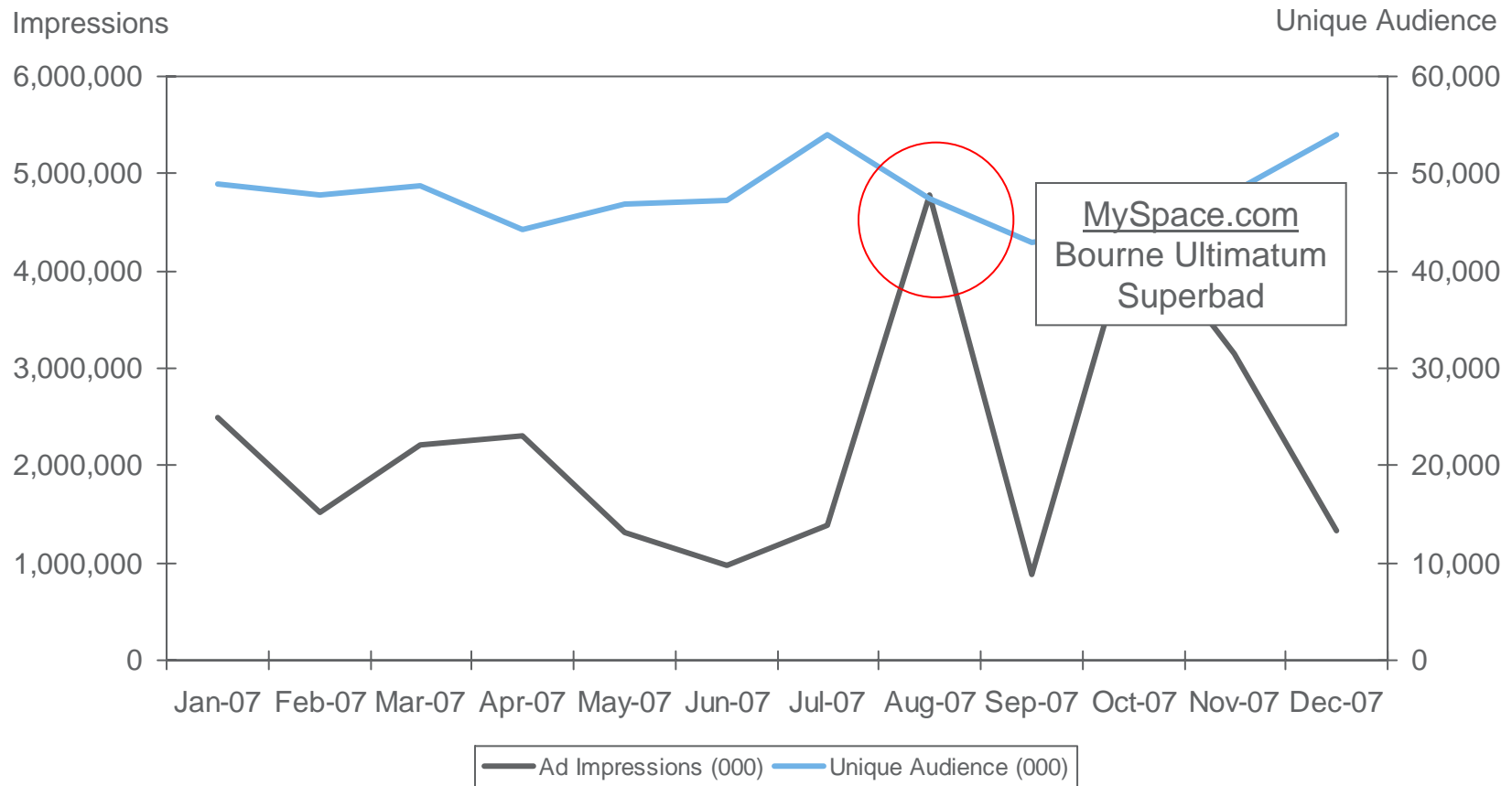
The Value of Sites to the Conversation Emerges

Site	% of Total
Studio Movie Site	29
IMDb	25
MSN Movies	10
Apple Trailers	3
YouTube	3
Rotten Tomatoes	2
AOL Moviefone	2
Wikipedia	2
Simpsons Promotional Sites	2
Blogdecine	2

Site	% of Total
Yahoo! Movies	2
Gothamist	2
Variety	1
USA Today	1
NY Times	1
MSNBC	0.4
Ain't It Cool News	0.4
BBC	0.4
Hollywood Reporter	0.4
CNN	0.3

Source: Nielsen Online BrandPulse; % of links related to Summer Blockbusters within discussions

Advertising Lagging Behind



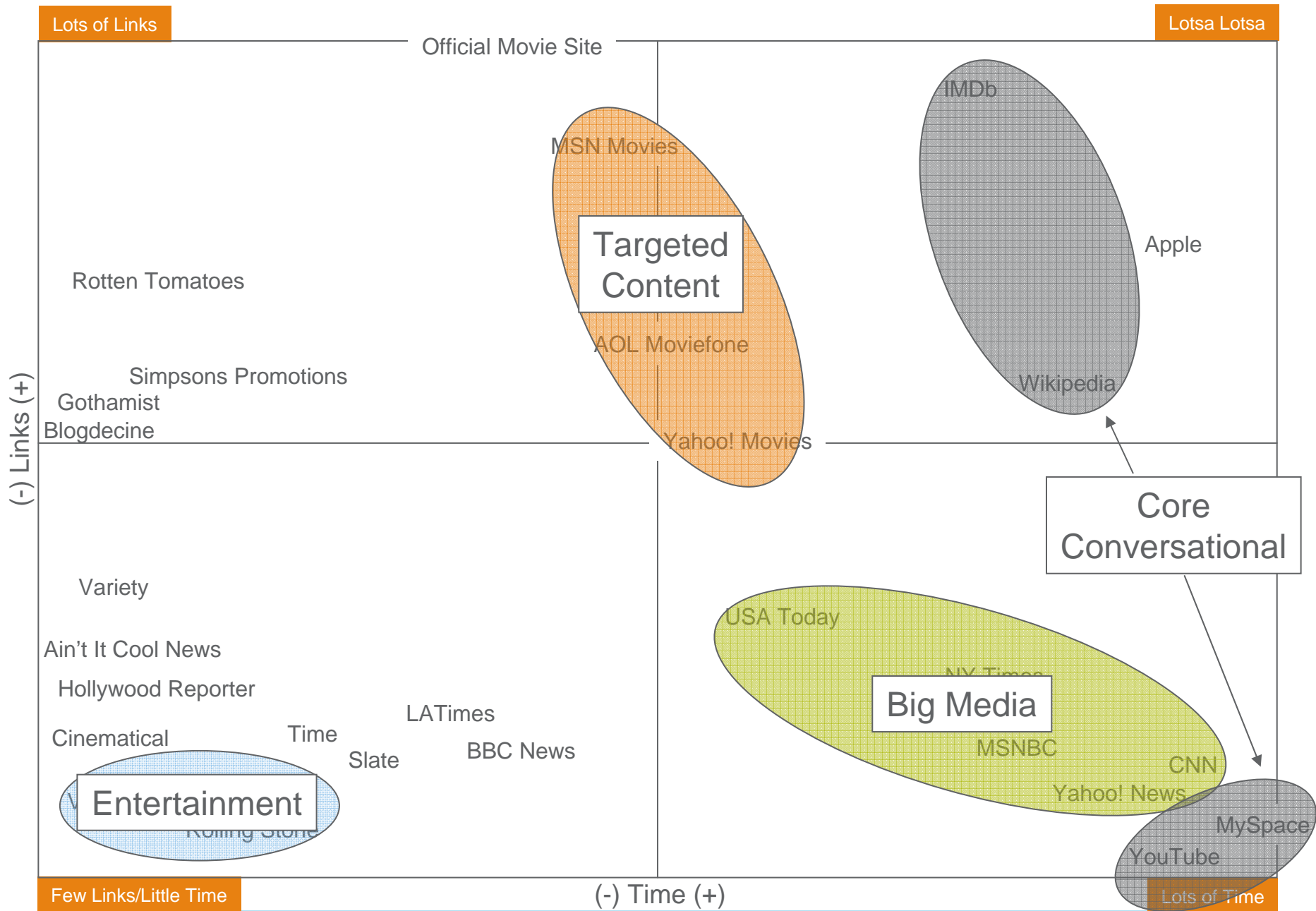
Source: Nielsen Online custom NetView, Ad Relevance – New release movie advertising

The Market Share Story after MySpace

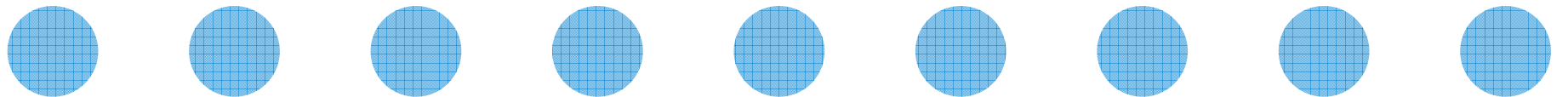
Site	% of Total
Myspace	45.7
Yahoo! (home page)	8.4
YouTube	6.9
NY Times	4.3
Nick.com	3.1
IMDb	3.1
Yahoo! Movies	2.2
Yahoo! Mail	2.2
Movietickets.com	1.5
MSN Movies	1.1

Site	% of Total
Cartoon Network	1.0
NeoPets	1.0
AOL Moviefone	1.0
MSN (home page)	0.8
Fandango	0.7
NBC	0.6
AOL Entertainment	0.5
Addicting Games	0.5
Disney Online	0.4
AOL (home page)	0.4

Source: Nielsen Online AdRelevance – May 2007 through August 2007 Ad Impressions of Summer Blockbuster movies

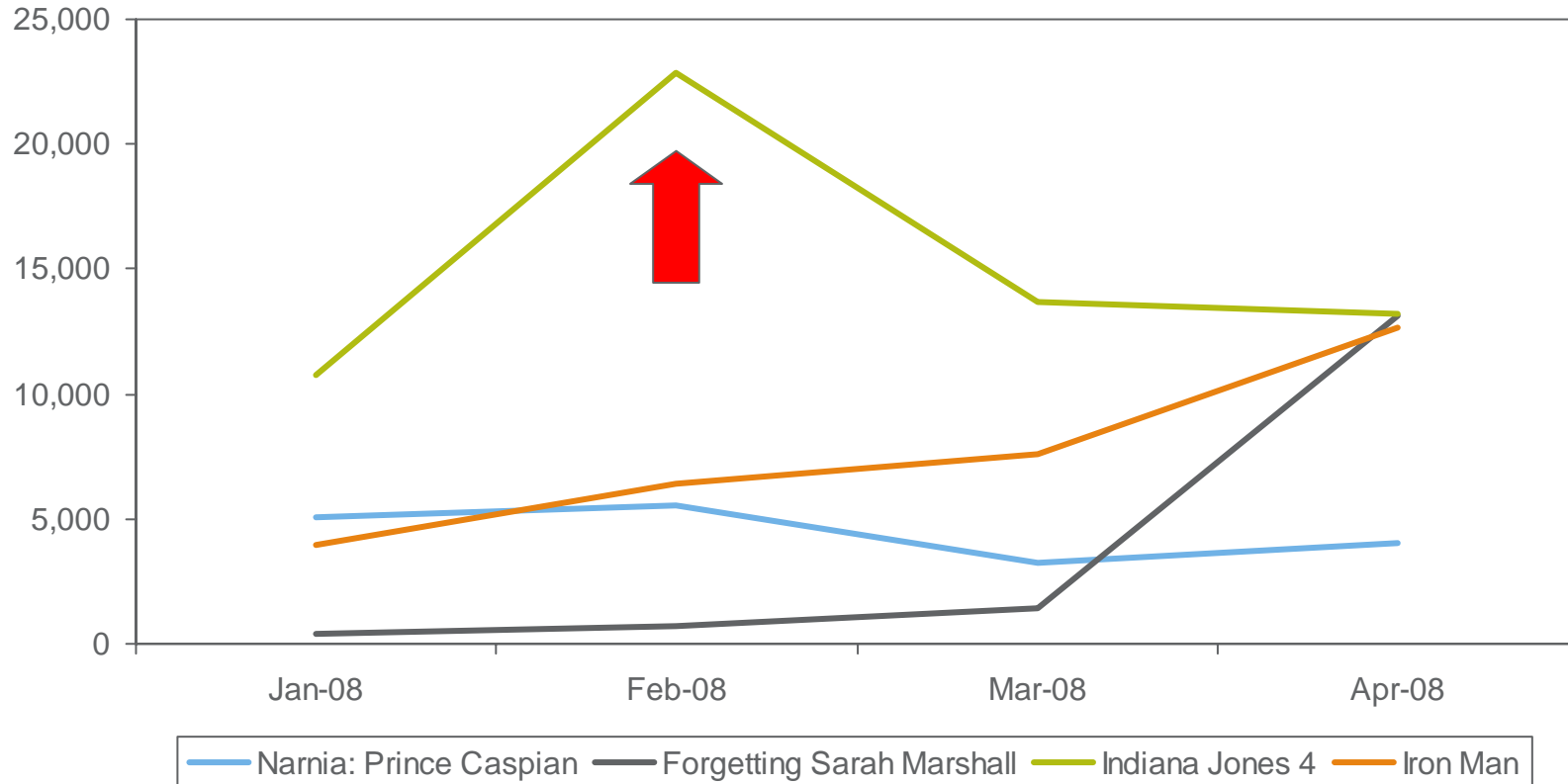


An Early Look at 2008



What had People Buzzing Early?

Message Volume



Source: Nielsen Online BrandPulse

And They're Saying...

"Indiana Jones and the Kingdom of the Crystal Skull, teaser trailer out <http://movies.yahoo.com/feature/ind...tml?showVideo=1> Awesome." ... Winamp Forums

I giggled and laughed and cried through the entire trailer for *Indiana Jones and the Kingdom of the Crystal Skull*. I have never sounded more fangirlish in my life, I'm sure. ...xanga.com/Lady_Shada

New indiana jones trailer

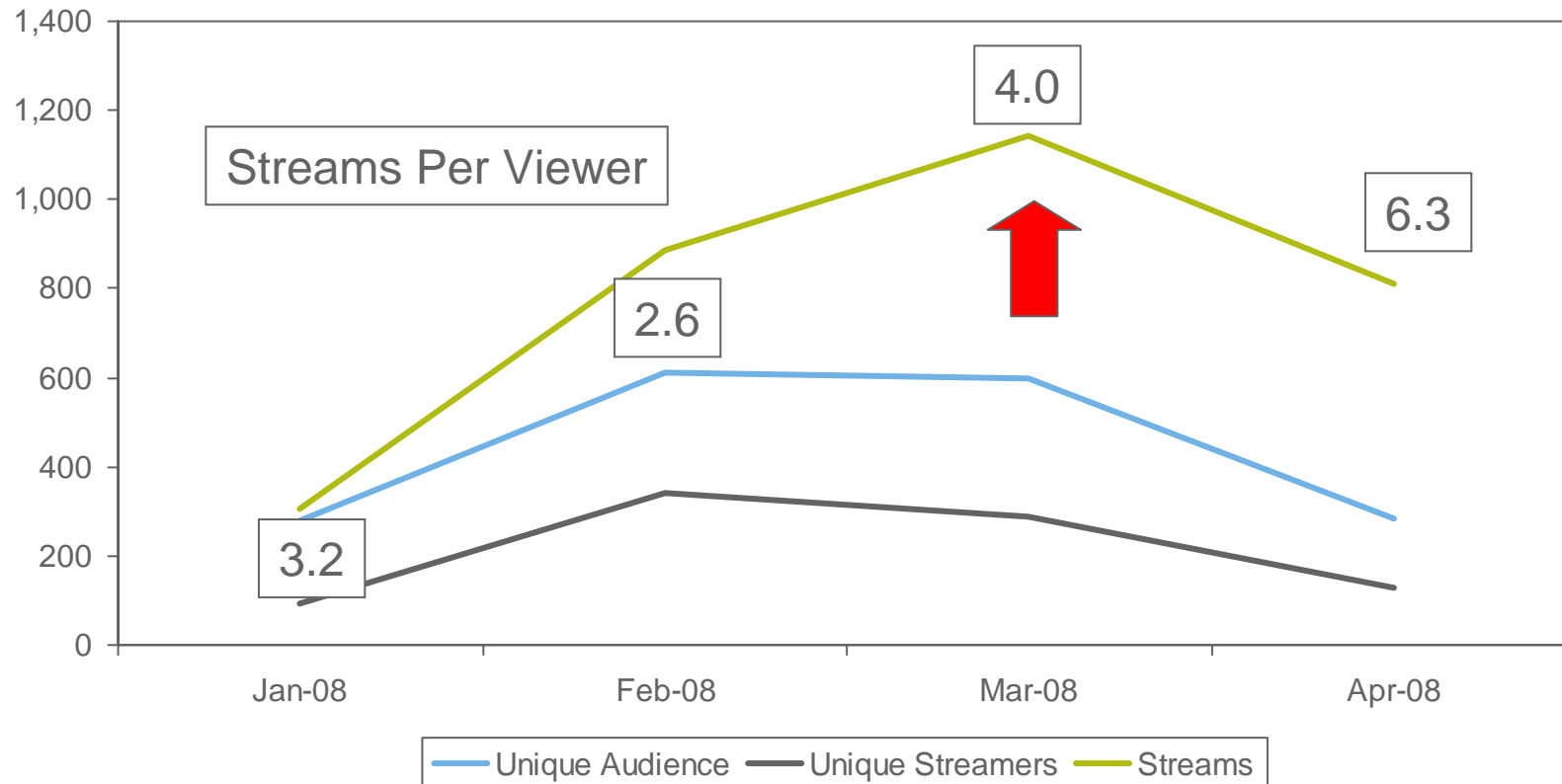
"Man, every time I watch that I giggle like a schoolboy!" ... community.playstation

"Indy 4 Trailer with Indy Punch" ... IMDb

Movie: Indiana Jones and the KINGDOM OF THE CRYSTAL SKULL

"I've been waiting for this for a while now" ... houston-imports.com

Visitors Swinging into Action on *Indianajones.com*



Source: Nielsen Online NetView, VideoCensus

Key Findings

- There is an audience and appetite for movie content online, especially in Summer
- Marketing online is as complex as offline combined even though everything is 'under one roof'
- Discussion and content interest are closely related

Conclusion

- Studios and movie marketers need to optimize the full scope of marketing opportunities online
- Publishers and studios should partner in developing promotional activity
- The relationship with conversational media can differentiate publishers and greater marketing impact for movie marketers