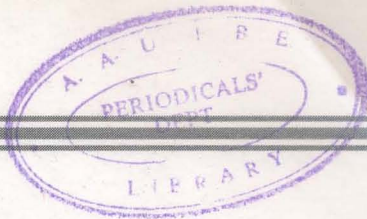


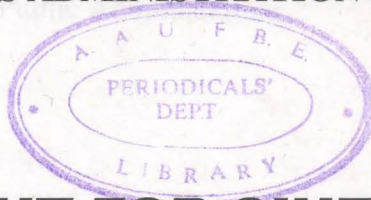
MBA 52



ADDIS ABABA UNIVERSITY

FACULTY OF BUSINESS AND ECONOMICS

MASTERS OF BUSINESS ADMINISTRATION (MBA) PROGRAM



**AN ASSESSMENT FOR CINEMA SCREEN
ADVERTISEMENT POTENTIAL IN
ETHIOPIA**

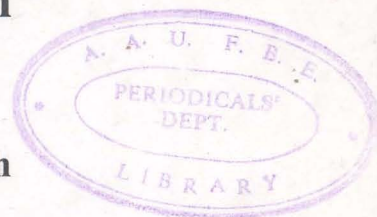
**A PROJECT PAPER REPORT SUBMITTED IN PARTIAL
FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE OF
MASTERS OF BUSINESS ADMINISTRATION**

By Deribie Mekonnen

Advisor: Dr. Gurmeet Singh

Faculty of Business and Economics

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JUNE 2004


52

MBA
DER

Dr. Gurmeet Singh
Faculty of Business and Economics
Department of Management and Public Administration
Addis Ababa University
Ethiopia

C E R T I F I C A T E

This is to certify that Ato Deribie Mekonnen has carried out his research work on the topic titled, " *An Assessment for Cinema Screen Advertisement Potential in Ethiopia*" under my supervision. This work is original in nature and it is suitable for submission for the partial fulfillment of the requirement for degree of masters of business administration.

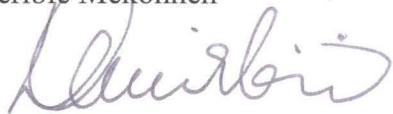

Research Supervisor 30/06/04

DECLARATION

I Deribie Mekonnen declare that this work titled," *An Assessment for Cinema Screen Advertisement Potential in Ethiopia*" is my own effort and study. I have produced it independently except for the guidance and suggestions of the research supervisor.

This study has not been submitted for any degree or diploma in this, or any other university. It is offered here in partial fulfillment of the requirement of the degree of Masters of Business Administration

Deribie Mekonnen



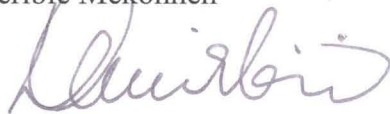
Researcher

DECLARATION

I Deribie Mekonnen declare that this work titled," *An Assessment for Cinema Screen Advertisement Potential in Ethiopia*" is my own effort and study. I have produced it independently except for the guidance and suggestions of the research supervisor.

This study has not been submitted for any degree or diploma in this, or any other university. It is offered here in partial fulfillment of the requirement of the degree of Masters of Business Administration

Deribie Mekonnen



Researcher

A C K N O W L E D G E M E N T

Profound thanks are due to Dr. Gurmeet Singh, my research advisor, for his unfailing encouragement, guidance, constructive comments, useful suggestions and warm welcome whenever and wherever I was in need of consultation. Indeed without his unreserved dedication, the successful completion of this study would have been difficult.

I would like to express my heart felt thanks to people who cooperated in filling in the questionnaire and the officials of the Addis Ababa cinema house administrations and management of promotional enterprises who were very cooperative in responding to the interview used to collect data for the study.

Finally I would like to thank all of my instructors who have been supporting and teaching me to come to a success.

Thank you all!!

Abstract

This descriptive study for an assessment of cinema screen advertisements potential in Ethiopia has three parts. Questionnaire for the first part and structured interview questions for the rest two parts were used as a tool for collecting data. Descriptive presentations of the results are discussed along with the findings of the reviewed literature. The first part of the study reveals that cinema/theater audiences are active in terms of making purchase decisions. The number of audiences is increasing even though no one has targeted them for advertisement when they are seated idle in the cinema/theater waiting for the movie or the theater to start. The second part of the study that focused on the cinema/theater houses has indicated that, if there are promotional enterprises that can produce and supply cinema screen advertisement slides or clips, they can run it and generate additional revenue. The third part of the study conducted on the promotional enterprises, on the other hand, has shown that there are very few limiting factors to start cinema screen advertisements except the missing awareness by the advertisers and the cinema/theater houses. Based on these indications, the study concludes that there is potential for cinema screen advertisements in Ethiopia. If the necessary preparations by the cinemas/theaters and the promotional enterprises are made and co-operations are established between these two parties that have the audience and the advertisers in common, the potential for cinema screen advertisement already exists.

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Operational Definitions:

- Cinema/Theater House –These two terms are used interchangeably in this study referring to the house or hall where people watch cinema or theater. It includes both private and public ones.
- Cinema Screen –refers to the white screen in cinemas or theater halls on which the running movie is projected so as to produce big picture.
- Cinema Screen Advertisement-refers the type of motion or stillness pictures for commercial advertisements that are projected on the cinema screen before the scheduled movie or theater starts.
- Cinema Administration- refers to the executives in charge of the management of the public as well as private theaters or cinemas that were contacted for the purpose of this study.
- Promotional Enterprises- these are businesses engaged in the activity of developing or producing and presenting advertisement promotional messages.

CHAPTER I

THE PROBLEM AND ITS APPROACH

1.1 Introduction

Commercial art is where every thing began in promotional activities. The following is stated about artwork in one of the well-known electronic encyclopedias (2003)¹

Artwork in a variety of forms is created to foster the sale of a product, service, or idea. Commercial art is used in many fields, such as advertising, packaging, publishing, cinema, television, and fashion, textile, and industrial design... The constant developments and improvements in lithography and photoengraving produced a flood of advertising—calendars, billboard posters, and catalogs. Late in the 19th century improved color reproduction and other advances increased the importance of commercial art and raised its standards.... In the 20th century, commercial art proliferated at an enormous rate. Specialists emerged in all fields; advertising agencies were established, offering an infinite variety of commercial art services....

The practice of art works is very aged in Ethiopia. The traditional arts have been well focuses particularly after the opening of some theaters and cinema houses in Ethiopia. The use of these commercial arts for business advertisement purpose however seems of recent phenomenon.

Most of the cinemas or theaters are located in the capital. Currently there are nine public and two private cinema/theaters in Addis Ababa. All of them do not have cinema screen advertisement pre-shows to their movies or theaters. Cinema screen advertisement however is very common in countries that are following the free market economic policy that demands completion not only in the general business operations but also in their communication about their products or services. It is another medium for audio-visual presentation of advertisement messages.

On the other hand, there are many promotional enterprises operating in the country at different capacities that can produce clips or slides for cinema screen advertisement. It is therefore time to asses the national potential foe cinema screen advertisements and provide the starting work and relevant recommendations. This project work aimed to be use as partial fulfillment of the requirements of the degree of masters of business administration has the above purpose.

The first chapter discusses the problem statement and the methodological approach used in the study. It indicates the scope and significance of the study along with some practical limitations. Chapter two presents the review of related literature in brief. The third chapter contains the results of the three parts of the studies use in the paper. The fourth chapter is discussion. The last chapter is conclusion of the study and recommendations that consequently follow

¹ Microsoft® Encarta® Encyclopedia 2003. © 1993-2002 Microsoft Corporation. All rights reserved.

1.2 Statement of the Problem

During the command economy that our country was following, there were little promotional activities. There were few advertisements about a product or service on the sole Ethiopian Television. But after the change of government in 1991 that changed the economic policy of the country too, promotional activities are blossoming in country.

Today viewers of Ethiopian Television (ETV) are helpless that they can't avoid the commercials that are aired on ETV that may come against their interests. There is no zapping opportunity for the viewers except for few who have Digital Satellite Television (DSTV) services. This has happened because of the 'free' economic policy that the country adopted. Businesses are in competition today than any other time before. The major area of competition seems the promotions where advertisement is the prominent. Most of these advertisements come through ETV, the only and the monopoly broadcasting TV channel through out the nation.

Few years ago it was right to think for a common sense businessperson that the only way of advertising a company's product or service is through the Ethiopian Television. This might have been true because what they knew as an advertising media was ETV. But gradually other medias particularly the press has come in to picture. Out door advertisement medias like prism board and digital billboards started to appear around many squares of Addis Ababa City and special localities. Some company owned vehicles are also started to be seen carrying company logos, picture of the major products and mottos of the companies. This is

an indication that advertisers are searching for diverse advertisement media and they have started the media planning for their promotions.

But still a lot has to be done, as this is only the start of it. One other alternative in this area is cinema/theater screen advertisements. Cinema screen advertising here means paid advertisements on the movie screen or in the theater lobby. Cinemas are getting more attendants than ever in Ethiopia because of the exploded film production in the country. New locally made cinemas are appearing almost every fortnight. The attendants are also growing proportionally. But the cinema screens are always idle while the attendants are waiting for the cinema to start. These waiting attendants could be one of the targets for effective advertisement.

Cinema screen vision captures moviegoers from the moment the cinema/theater attendants enter a theater, pick their seat and focus on the screen. Cinema screen promotions can help in building custom program that responds to specific media strategies while maximizing the use of screen vision cinema tools. This opportunity has not been utilized before in Ethiopia because it was not studied, and not known.

The study, therefore, is based on the hypothesis that there is a potential for cinema screen advertisements in Ethiopia.

1.3 Research Objectives

1.3.1 Main Objective of the Study

The main objective of the study is to assess the potentials for cinema screen advertisements in Ethiopia. And based on the results, conclude whether there is a potential for cinema screen advertisements or not and highlight research direction as well as to provide recommendations.

1.3.2 Specific Objectives of the Study

The study had the following specific objectives:

- To know whether cinema audiences would develop a positive or a negative feeling if they were exposed to advertising messages screened prior to a movie or a theater.
- To detail the level of satisfaction the cinema audiences have got on ETV advertisements if they have had a chance to see some and know how they rate ETV ads on some selected basic factors.
- To know the limiting factors that may hinder the cinema administrations to start and run cinema screen advertisements
- To know the limiting factors that may hinder the promotional enterprises to start and run production of promotions and /or advertisements messages for cinema screen advertisements
- To asses the demographic characteristics of cinema audiences and interpret what it indicates for the start of cinema screen advertisements.

1.4 The Research Methodology

In general the method used in this study is descriptive. Descriptive statistical analyses are used in the interpretation and discussions. Charts and percentages are widely used to present the results of the study.

1.4.1 Research Design

The research design used in this study is cross sectional survey design that slices a sample of population at a time. This design was chosen because it focuses on description- describing the characteristics of a population (Shandhenssy and Zechmeister, 1994)* Three different categories of population, i.e., cinema audiences, cinema/theater administration, and promotional enterprises, are used in the study denoted by Study I, Study II, and Study III respectively.

1.4.2 Population

The population of the study I is the cinema/theater attendants in Addis Ababa. Currently there are thirteen theater/cinemas houses in Addis Ababa. These are geographically dispersed in the metropolises. And each of the theater /cinema houses has got different number of seats. They are also of different standards.

The population for study II was cinema/theater house administration people who are in charge of the administration of the theaters/cinemas in Addis Ababa. The size of this population is the same as the number of the theater/cinema house in Addis Ababa. As an addition to these, the Addis Ababa Cinema Houses Administration of the Addis Ababa City Government is included. It is a body that centrally administrates the public cinema/theater houses in Addis Ababa. The population for study III constitutes the major promotional enterprises operating in Addis Ababa.

* John J. Shanghnessy and Eugent B. Zechmeister, (1994), Research Methods in Psychology, 3rd Ed, New York, McGraw Hill

1.4.3 Sample Frame

The sample frame used for the study I was a audience of s elected cinema/theater in Addis Ababa within a particular week. To develop this sampling frame, the geographical distribution of the cinema houses/theaters in the city was taken in to account and attempts were made to cover wider locality with the judgmental sampling of the cinemas/theaters. The sample frame was determined based on convenience.

The sample frame for Study II was the same as the population for study II. That is, the entire, cinema /theater houses in Addis Ababa were the sample frame for the study.

For the third study, the major promotional enterprises were taken as the sample frame. Here also the geographical distribution of these promotional enterprises was taken in to account to incorporate most of the enterprises from all the corners of the metropolis.

1.4.4 Sample Size

The sample size of the audiences from the sample cinemas/theaters for this study was determined based on quota. This was preferred because holding capacity of the selected cinemas /theaters vary significantly. For cinema/theater administration part, the sample frame and the sample size were one and the same except because of failing telephone contact with few of the identified promotional enterprises. The sample size for promotional enterprises was detrained based on convenience and judgment.

1.4.5 Data Collection Technique.

The data from the cinema/theater audience for study I was collected mainly through questionnaire that the respondents were kindly requested to fill while they were at the cinema/theater. The questionnaires were prepared in Amharic languages to enhance good understanding of the questions and to appeal to all of the respondents. This was done because it is believed that more than half of the cinema/theater goers do not properly understand the content of the questionnaire in English language and/or the meaning of some of the contents of the questionnaire may be misleading to them if they are far from particularly the fields of promotion. In addition, Amharic is the federal language and almost all residents in Addis Ababa understand it. The questionnaires were distributed to the respondents randomly when they were waiting for check in at the gates of the cinemas or theater houses.

The data collected both from cinema/theater administration and promotional enterprises were through structured interview questionnaires that were administered through telephone. The researcher administered it so that some doubts the respondents had have been cleared. The responses were immediately recorded in the prepared format. Additional comments and suggestions were taken from the willing respondents.

1.5 Scopes and Significance of the Study

Because mixed-media research has focused on print and television (Confer and McGlathery, 1991)² and outdoors and television (Whitehill-King and Tinkham, 1989)³, there is a shortage of empirically grounded literature on cinema advertising. This is very particular in Ethiopia. The researcher has no access to empirical studies made in Ethiopia so far on this specific topic and even on the related areas. The present study goes some way toward addressing this lack by reviewing the characteristics of the medium, providing empirical evidence on

² Marian Confer and Donald McClathery. "The Research Study: The Advertising Impact of Magazines in Conjunction with Television." *Journal of Advertising Research* 31, 1 (1991): RC2-RC6.

³Whitehill-King and Tinkham Shelton, ed. "Hooked to the Silver Screen." *Marketing*, May 28, 1998.

whether cinema screen advertisement is a potential to make money for an entrepreneur or not. Recommendations are made by interpreting the evidences in this study in a manner that will enable practicing managers to use the medium more effectively for the purpose of effective advertisements. The article also serves as a springboard for future researchers, both commercial and academic, to advance the theoretical boundaries in this under researched domain

1.6 Limitations of the study

Major limitation of the study is that there are little or no empirical studies that have been made on the topic of cinema screen advertisement in Ethiopia. The fact that almost half of the respondents to the study questions did not have enough understanding and experiences in the field of advertisement as a business has been an other limitation. The use of telephone for data collection, as it naturally is, resulted in abrupt responses that are very short and shallow in content. There was difficulty in getting the respondents right on the appointment date and time over the telephone besides to some failure of contact mainly because of poor telephone handling by some secretaries of the promotional enterprises.

CHAPTER II

REVIEW OF RELATED LITERATURE

Sut Jhally argues that, 'Advertising is the most influential institution of socialization in modern society.' (Jhally, 1987).⁴ Advertisements are a common and accepted part of daily life, in print in magazines and newspapers, as well as in vision on television and cinema screens, and increasingly on the Internet, as well as on radio. As Greg Myers explains: 'Ads are common culture in a way that even the most popular movies or books are not.' (Myers, 1994)⁵.

The main reason behind commercial advertising is to increase familiarity and goodwill with the name and image of the company, rather than the actual product itself (Vestergaard & Schroder 1985, 1)⁶. J. Williamson provided the basis of the argument for studying adverts with the following statement: 'Pervading all the media, but limited to none, advertising, forms a vast superstructure with an apparently autonomous existence and an immense influence.' (Williamson, 1978: 11)⁷ Being so widespread and obviously influential they are therefore worthy of study for many reasons.

The role of promotion is to communicate with individuals, groups, or organizations to directly or indirectly facilitate exchanges by informing and persuading one or more to accept

⁴ Jhally, S (1990): *The Codes of Advertising*. London: Routledge

⁵ Myers, G (1994): *Words in Ads*. London: Edward Arnold

⁶ Vestergaard, T & K Schroder (1985): *The Language of Advertising*. Oxford: Basil Blackwell

⁷ Williamson, J (1978): *Decoding Advertisements*. London: Marion Boyars

an organizations product (Pride and Ferrell, 1993)⁸. One of the promotional mixes by which an effective communication is done is an advertisement whether it takes any form or it is local, national or international.

National advertisements have got big influence on the citizens. For example, a study made on national advertising by Woodside and Taylor (1978)⁹ reveals that the greater the consumer perceived level of national advertising, the higher the consumer perceived level of product quality and an increase in perceived product quality produces an increase in consumer purchase intention.

Some other studies on the other hand came up with findings that seem opposing. Kamin (1978)¹⁰ for example states that high level of reach frequency in advertisements does not necessarily results in high level of brand awareness and /or recall. Haug and Rostvig (1978)¹¹ studied the relationship between target group and message of advertisements and concluded that relationship between target group and message is important and that even modest difference in advertising message can result in highly different consumer reactions.

When we come to cinema advertisement, as an advertising medium, cinema has traditionally been favored by local retailers and service providers (Ewing, 2001).¹² However, a number of recent developments have impacted positively on the medium's future position

⁸ William M. Pride and O. C. Ferrell (1993): Marketing: Concepts and Strategies.8th Ed., Toronto, Houghton Mifflin Company.

⁹ Arch G. Woodside and James L. Taylor, Consumer Purchase Intention and Perception of Product Quality and National Advertising, Journal of Marketing, Winter1978, pp.48-51

¹⁰ Howard Kamin, Advertising Reach and Frequency, Journal of Advertising Research, February1978, pp. 21-25

¹¹ Kjell Gron Haug and Leif Roststvig, Consumers reaction to Advertisements Messages, Journal of Advertising Research, April 1978, pp. 23-28

¹² Michael T. Ewing, Cinema Advertising Re-considered Journal of Advertising Research, 00218499, Jan/Feb 2001, Vol. 41, Issue 1

in the mix (Rust and Oliver, 1994)¹³. First, television advertising, particularly network television, has come under scrutiny leading advertisers to search for alternative media to complement television. Second, cinema commercials have been well received by audiences in the markets where they have been introduced. Third, a growing list of well-respected, multinational advertisers are including cinema in their media schedules. This has resulted in an exponential growth in worldwide cinema advertising expenditure. Last, renewed interest in "media synergy," "media interaction," "mixed media," and "multiple media" have led agencies to search for potentially symbiotic interrelationships between media.

According to the Motion Pictures Association of America¹⁴, cinema advertisements have got pros and cons. Its pros include (a) localization—Cinema advertisements can be geographically, (b) high recall—Average moviegoer recall is 66 percent with cinema slides, nearly three times higher than television alone, (c) captive audience—Viewers cannot switch it off or change the channel, (d) low clutter— ad is not competing with hundreds of others for space and attention, and (e) low cost. The cons, on the other side include, (a) limited reach —Small audience compared to TV, radio and print and (b) potential resentment—Some viewers may resist attempts to persuade them to consider personal subjects.

¹³ Roland T Rust and Richard Oliver. "Advertising on its Deathbed." *Journal of Advertising* 23, 4 (1994): 71-77.

¹⁴ Motion Picture Association of America Worldwide Market Research, 2002, 2001 A.C. Nielsen EDI (based on circuits/theaters reporting grosses in 2001) Nielsen Media Research, 2001 <http://www.ignitingministry.org/pdf/theateradvertising.pdf>

Commonly cited advantages of cinema advertising include exposure, mood carryover, low absolute costs, and high recall (e.g., Belch and Belch, 1998)¹⁵.

Cinema is a unique advertising medium. Cinemagoers are both receptive and captive while seated in the darkened auditorium with no distractions. All these factors combine to ensure cinema advertising has the highest impact¹⁶

Unlike television, which document viewers' opportunity to see particular programmes (and by implication advertisements), little is known about cinema goers' exposure to advertising messages¹⁷.

Cinema advertisement is unique in that it reaches an attentive, captive audience. Consumers are not subject to the distractions they face at home such as the telephone, door knocks, child disturbances, multiple media channels or simply performing household activities away from broadcast media during commercial breaks¹⁸.

The trend is shifting from high dependence on TV advertisement to an alternative advertisement medium. Studies have indicated that TV commercials have some limitation. For example, televised commercials are misunderstood or miscomprehended because of factors such as fleeting message, clutter and limited viewers' attentions (Belch and Belch,

¹⁵ Belch, George E., and Michael A. Belch. Advertising and Promotion. An Integrated Marketing Communications Perspective, 4th ed. New York, NY: Irwin McGraw-Hill, 1998.

¹⁶ Untitled < <http://www.screenvision.com/ScreenvisionPremier.php> >

¹⁷ Marketing Bulletin, 1996, 7, 58-66 Page 3 of 8 < <http://www.marketingbulletin.com>
<http://marketing-bulletin.massey.ac.nz> >

¹⁸ Studio Movie Grill, Cinema Advertising: Viewer Demographics, <jlheath@studiomoviegrill.com>

2001)¹⁹. Jacoby and Hoyer (1982)²⁰ in their study that focused on viewers' miscomprehension of televised commercial, found that every one of the six televised commercial communication was miscomprehended and the average amount of miscomprehension associated with any given communication was unexpectedly high for diverse respondents. In addition, according to Jackoby, et al (1974)²¹ finite limit exists to the amount of commercial information consumers can effectively use.

Empirical studies made on the impact of commercial persuasion on children and their reaction to the television advertisement clearly indicates that there is lack of selectivity in TV commercials. Robertson and Rositer (1974)²² found that, when a child attributes persuasive intent to commercials, he/she believes them less, likes them less, and is less likely to want the product advertised. And Goldberg and Gorn (1978)²³ in their findings noted that, the attitude and behavior of 8 to 10 years old boys are affected by commercial exposure. The add seeing a single commercial produces more favorable reaction but further exposure to commercials does not increase this effect.

¹⁹ Gorge E Belch and Michael A. Belch (2001), Advertising and Promotion: An Integrated Marketing Communication Perspective, 5th Ed., Boston, and McGraw Hill.

²⁰ Jakob Jacoby and Wayne D. Hoyer, Viewers miscomprehension of Televised Communications: selected findings, Journal of Marketing, Vol.46 (Fall 1982), pp.12-26

²¹ Jakob Jackoby, Donald E. Speller, and Carol Kohn Berning, Brand Choice Behavior as a Function of Information Load: Replication and Extension, Journal of Consumer Research, Vol.1, June 1974, pp.33-43

²² Thomas S. Robertson and John R. Rositer, Children and Commercial Persuasions: An Attribution Theory Analysis, Journal of Consumer Research, Vol.1, June 1974, pp. 13-21

²³ Marvin E. Goldberg and Gerald J. Gorn, Children's Reaction to Television Advertisements: An Experimental Approach, Journal of Consumer Research, Vol.1, June 1974, pp. 37-46

The ultimate users of the product or service share the cost of advertising. Farris and Albion (1980)²⁴ in their study of the impact of advertising on the price of consumer products, concluded that, high relative manufacturer advertising is correlated with high relative consumer brand price, but not as strongly as high relative manufacturer advertising is correlated with high relative manufacturer factory price. High relative manufacturer advertising is correlated with low relative retail margins. The cost of cinema advertisement, however, is not that much significant in comparison to TV advertisements. For example cinema advertising expenditure is currently a modest \$65m in the United States (Dill, 1999)²⁵. In the United Kingdom the medium accounts for 1.4 percent (approximately US\$135m) of total advertising expenditure (Reid, 1999)²⁶. In South Africa, cinema advertising expenditure was more than double between 1995 and 1999 and recently accounts for 1.1 percent (US\$10.5m) of total advertising expenditure following an increase in the use of the medium (Ewing, 2001)²⁷.

Information seekers in commercials are more socio-economic elite, active, and involved audience segment (McEwen, 1978)²⁸. Peter Wright (1975)²⁹, who studied factors affecting cognitive resistance to advertising, has come up with the finding that, trait-type characteristics (general social confidence and information processing confidence, acute

²⁴ Paul W. Farris and Marks S. Albion, The Impact of Advertising on The Price of Consumer Products, *Journal of Marketing*, Vol.44 (summer 1980), pp. 17-35.

²⁵ Mallorie Dill, "Coming Attractions." *Ad week*, August 23, 1999.

²⁶ Alasdair Reid, "Cinema Under Scrutiny after SMG's Pearl and Dean Takeover." *Campaign*, June 18, 1999.

²⁷ Michael T. Ewing, Cinema Advertising Re-considered *Journal of Advertising Research*, 00218499, Jan/Feb 2001, Vol. 41, Issue 1

²⁸ William J. McEwen, Bridging the Information Gap, *Journal of Consumer Research*, March 1978, pp.247-251
Peter Wright, Factors Affecting Cognitive Resistance to Advertisement, *Journal of Consumer Research*, Vol.2 No.1, June 1975. pp. 1-10

characteristic & peer designated topical opinion leadership affect counter response activities to advertisements. Colvin, et al (1980), suggests that means of segmenting promotional strategy is better done allowing cross country differences in product perception and product attribute preferences.

The greater advantage of TV, on the other, hand is the opportunity it provides for presenting and advertising message. The interaction of sight and sound offers tremendous creative flexibility and makes possible dramatic and life like representation of products and services. TV commercials can be used to convey a mood or image for a brand as well as to develop emotional or entertainment appeal that makes the product appear inserting (Belch and Belch, 2001).³⁰ It is also an excellent medium for demonstrating a product or service.

³⁰ Gorge E Belch and Michael A. Belch (2001), Advertising and Promotion: An Integrated Marketing Communication Perspective, 5th Ed., Boston, and McGraw Hill.

CHAPTER III

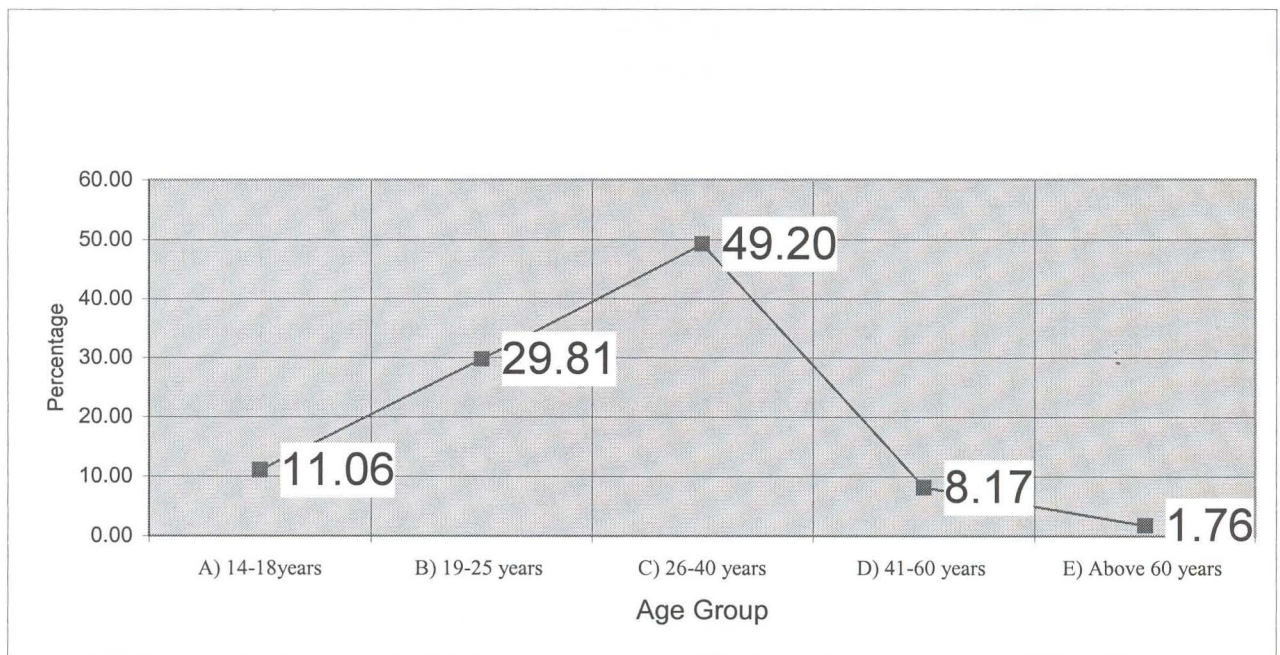
RESULTS OF THE STUDIES

3.1 Result of Study I

Part I

In study I, from the total of 624 cinema/theater audiences (please see annex I for all the results of this study along with its percentages) that have filled the questionnaire 53.85% were male and 46.15% were female. Most of them fall to the age group of 24-40 (49.20%) when significant number of the respondents (29.81%) falls to the age group of 19-25 years.

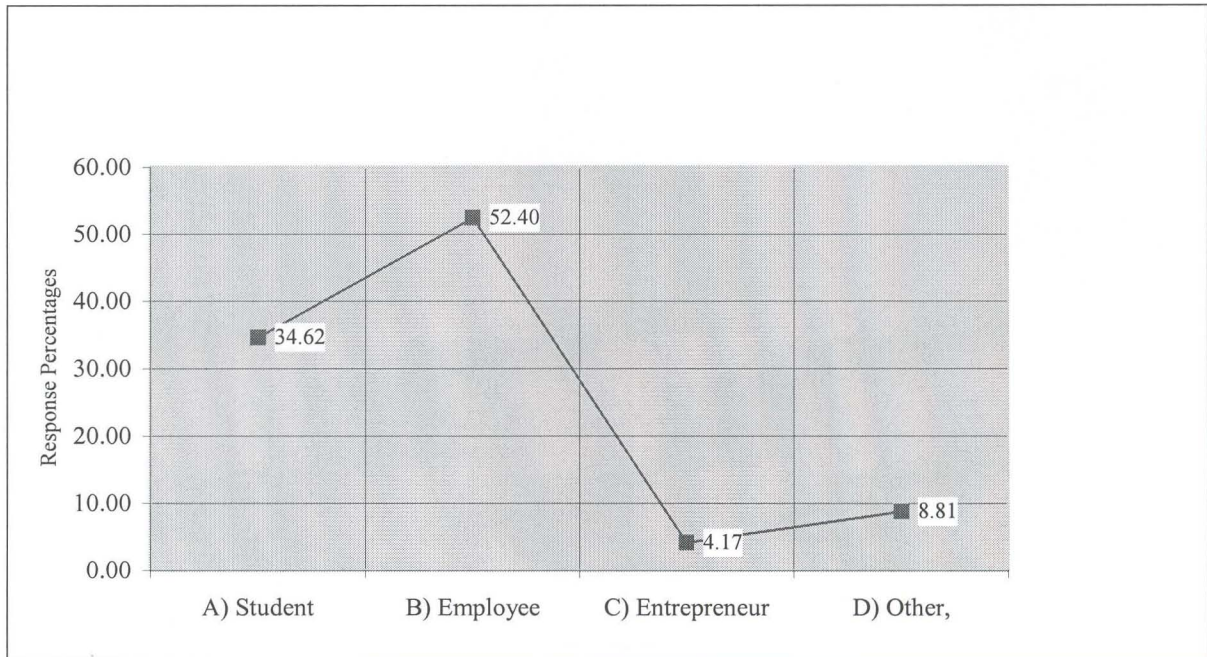
Chart 3. 1 Age Group of the Respondents



More than half of the respondents were single (50.64%). Slightly more than quarters were married (32.53%). 69.23% of the respondents have children.

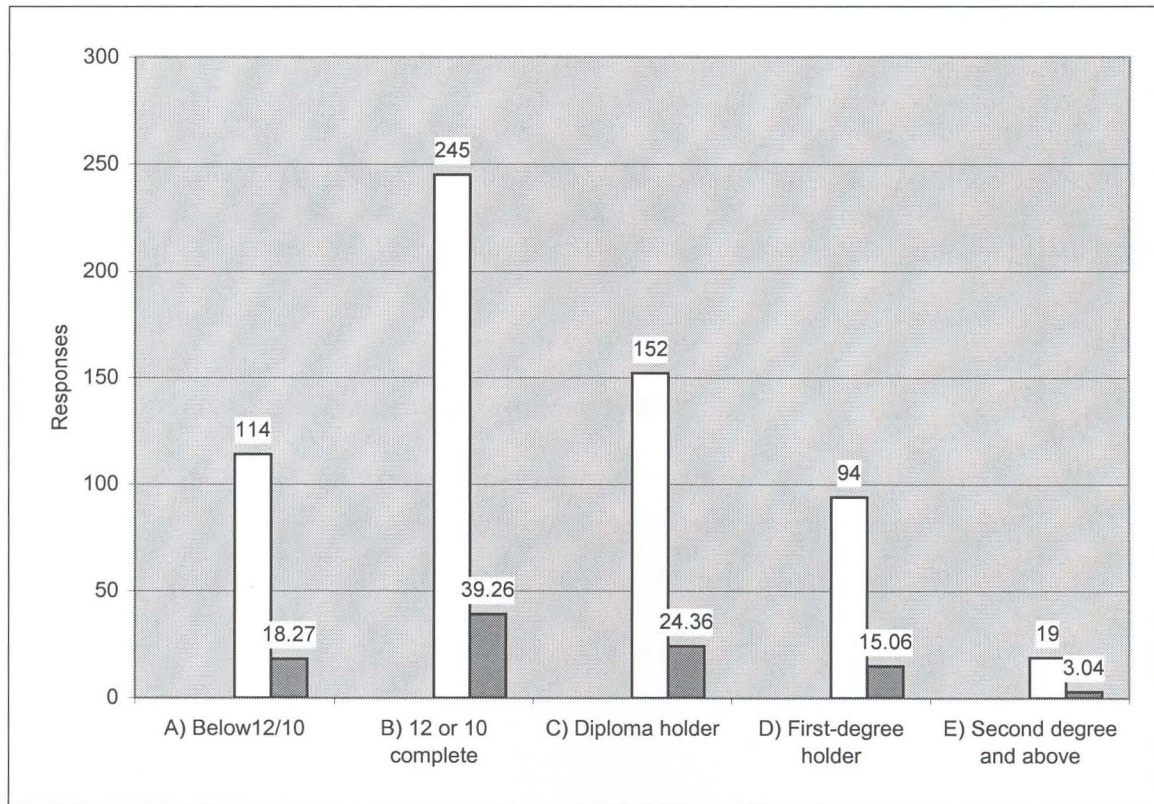
Occupations wise, most of the respondents were employees (52.40%). Followed by students (34.62%). Only few of them were entrepreneurs (4.17%).

Chart 3. 2 Occupation of the Respondents



The educational levels of most of the respondents are below first degree (81%). Only 19% have got first degree and above. Tenth or twelfth complete respondents are the majority (39.26%) followed by diploma holders (24.36%). Those who have got below tenth or twelfth grade education level were also significant (18.27%).

Chart 3.3 Educational Level of the Respondents



Almost all of the respondents live in Addis Ababa as their permanent residence (82.69%) while very few have come from out of Addis Ababa city mainly from different major towns of the nation (14.09%).

Part II

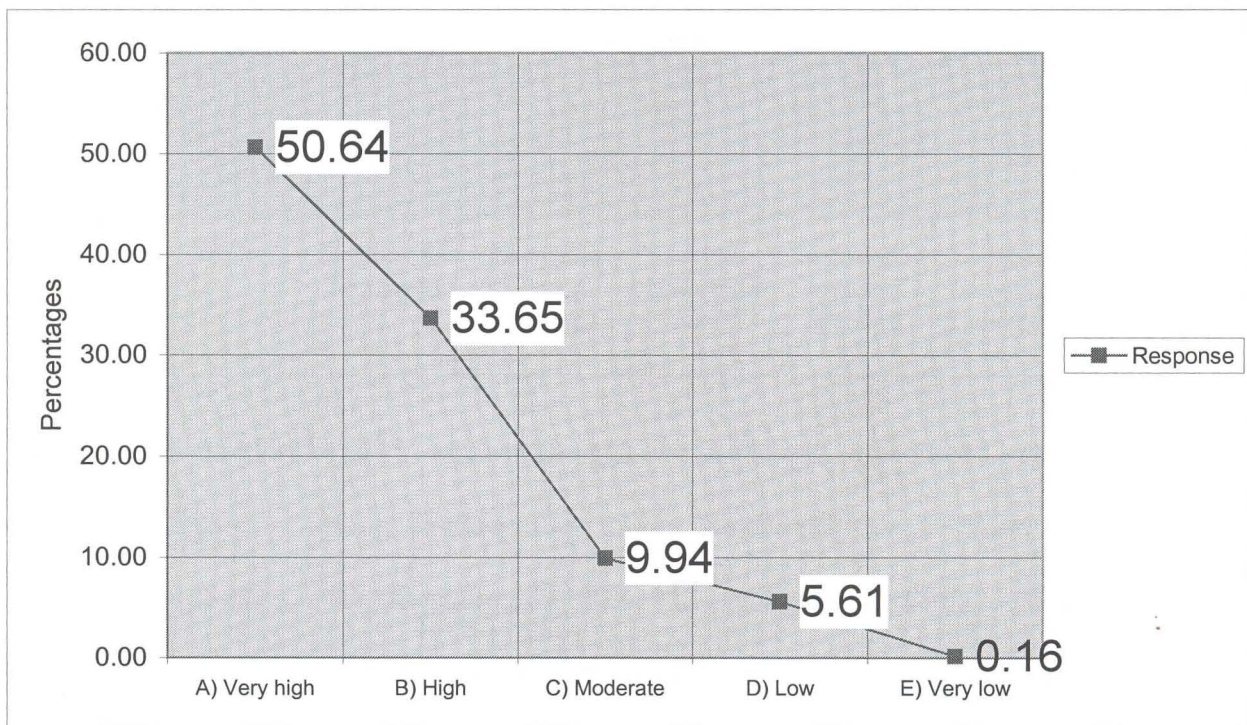
Most of the respondents (68.43%) have television set at home. Among them, 30.93% responded that they watch TV very often and 33.81% of them watch TV rarely. Indeed, 12.66% responded that they watch TV always.

Almost all of the respondents (95.99%) have answered that they knew what an advertisement means (Q2.3II). 63.14% of the respondents have shown their interest on TV

commercials while 36.86% of the respondents responded that they do not have an interest on TV advertisements.

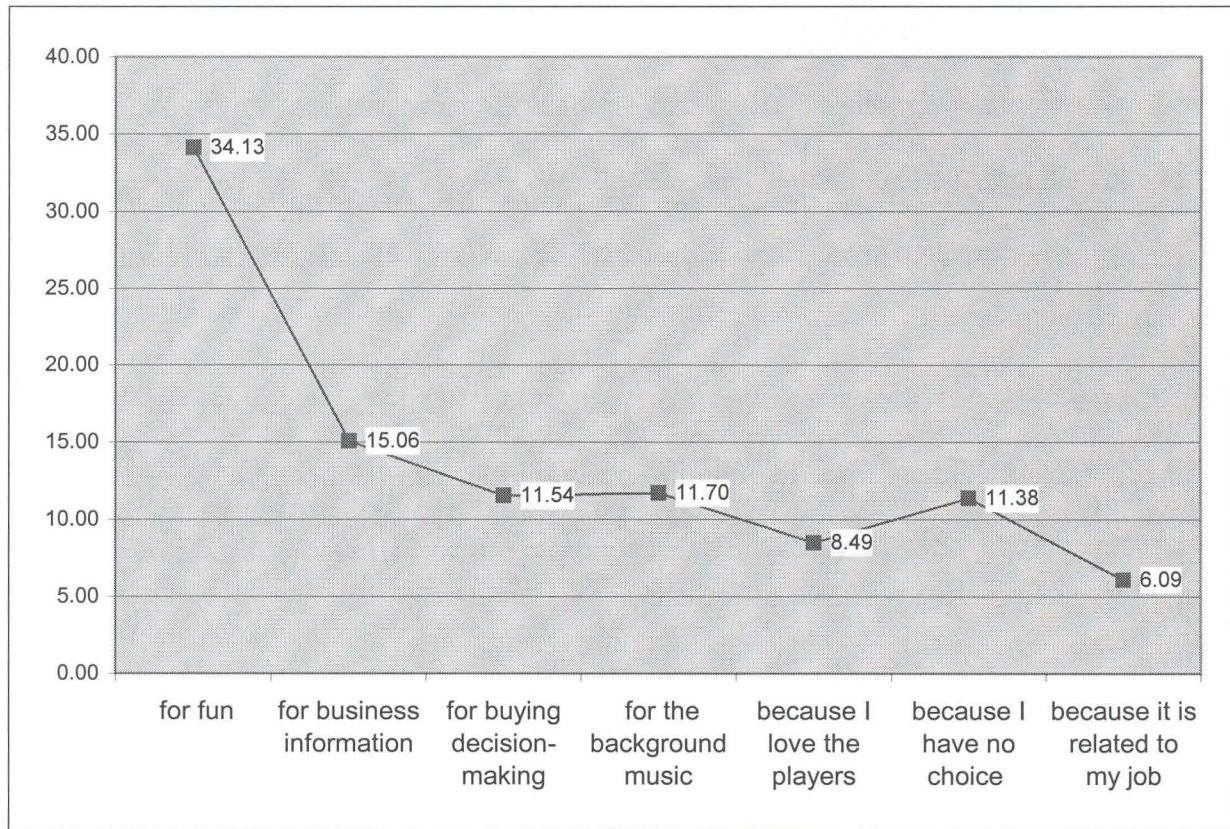
The respondents have judged the frequency of advertisements (Q2.4II) on the Ethiopian Television (ETV). Accordingly, 50.64% (316) said it is very high, 33.65% (210), high, and 9.94% (62) moderate.

Chart 3. 4 Evaluation of Advertisement Frequency on ETV



Asked why they watch ETV advertisements (Q2.7II), most responded that they watch it just for fun (34.13%, 213). Others responded that they watch it for business information (15.06%, 94), for buying decision making (11.54%, 72), for the background music (11.70%, 73), because they love the actor / actress who play the advertisements (8.49%, 53), and because it is related to their jobs (6.09%, 38). There are respondents (11.38%, 71) that have answered that they watch ETV advertisements because they have no other choices.

Chart 3. 5 Reason For Watching ETC Advertisements



On the evaluation of ETV advertisements, the audiences had varied responses. Among others, there is a strong disagreement to the statements that ETV advertisements are attractive (38.62%, 241), interesting (50.00%, 312), and unforgettable (23.08%, 144). On the other hand, the respondents have strongly agreed that ETV advertisements are entertaining (50.00%, 312), funny (33.97%, 212), key source of business information (32.21% ,201). The respondents have agreed that ETV advertisements are attractive (38.62%, 241), entertaining (34.61%, 216), persuasive (58.65%, 366), funny (49.37%, 308), key source of business information (49.36%, 307). They disagreed to the statement that ETV advertisements are boring (49.83%, 311) and ETV advertisements are believable (38.14%, 238).

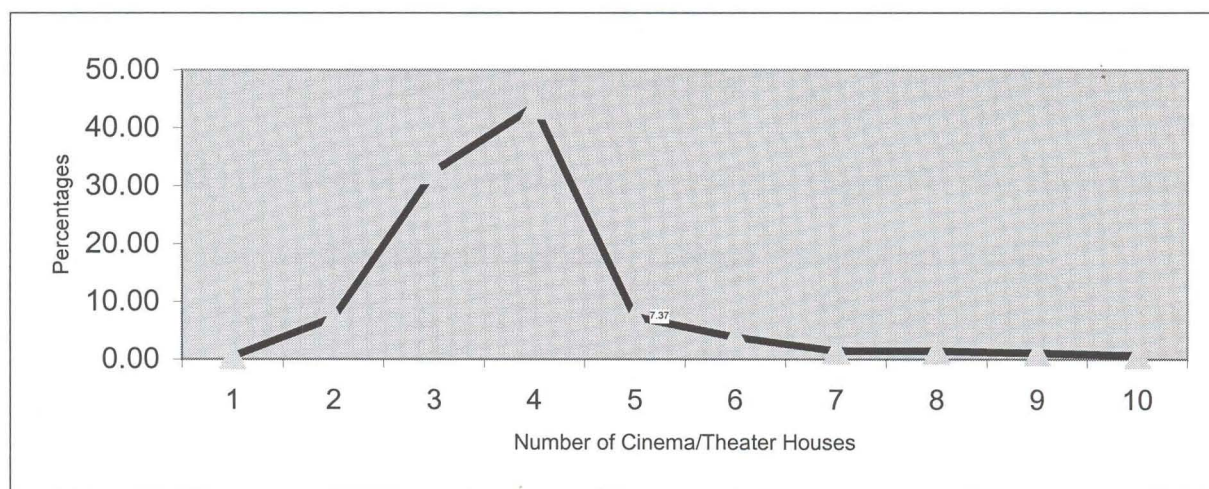
Through the evaluation of ETV advertisements, the respondents were asked on how they respond to statements, 'Advertisements dominate ETV programs' (Q2.4II o) and 'An alternative should be found for TEV advertisements' (Q2.4II n), 62.98% (393) strongly agreed to the former statement while 51.76% (323) strongly agreed to the later statement. Significant numbers of the respondents (32.37%) and (19.71%) respectively have agreed to these statements.

Part III

Most of the respondents (34.13%, 213) attend cinema/theater always, large number of the respondents (27.72%, 173) attends rarely and only few of them attend very rarely (4.65%, 29). In general, 67.15%(419) of the respondents attend cinema/theater always and/or very often (Q3.1II).

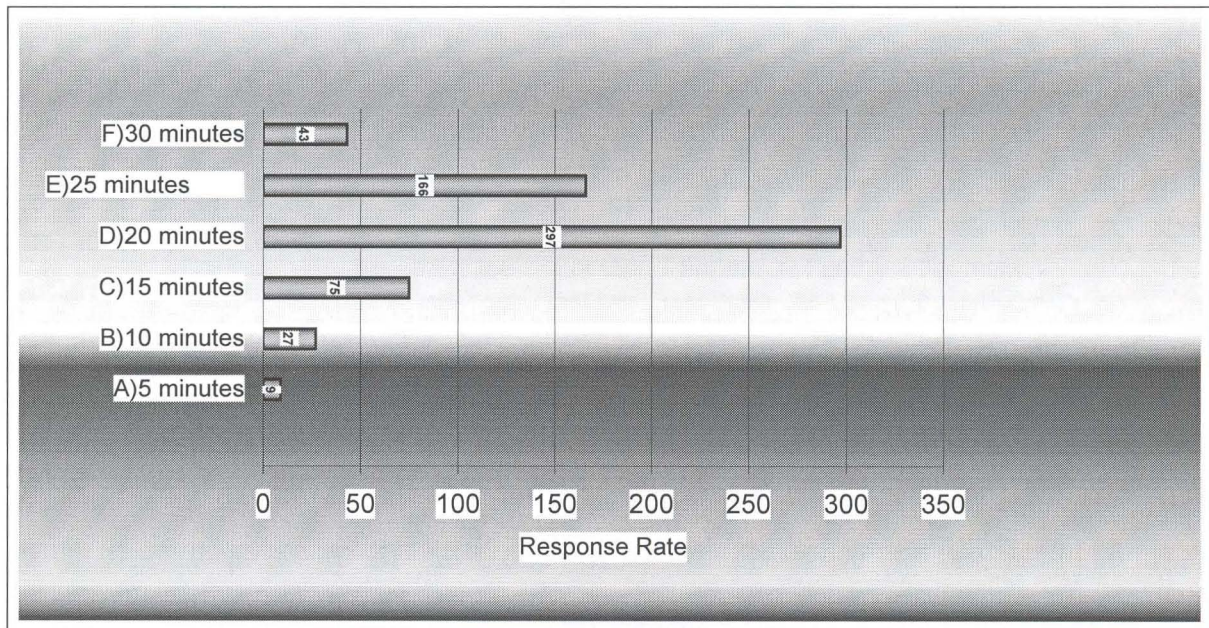
The respondents have reported that they knew three or four (76.28%, 476) of the cinema/theater houses in Addis Ababa where they have been attending cinema or theater. 4.10% (88) of the respondents have been attending cinema/theater at more than four cinemas/theaters.

Chart3.6 Number of Cinema/Theater Houses Attendants



Most of the respondents (47.60%, 297) have indicated that they avail themselves to cinemas/theaters at least twenty minutes before the cinema/theater starts (Q3.3II). 26.60%(166) of them reach the cinema/theater house when 25 minutes remain for the movie/theater to start. Some of the respondents come to the cinema/theater early by 15minutes (12.02%, 75), 10minutes (4.33%, 27), 5minutes (44%, 9).

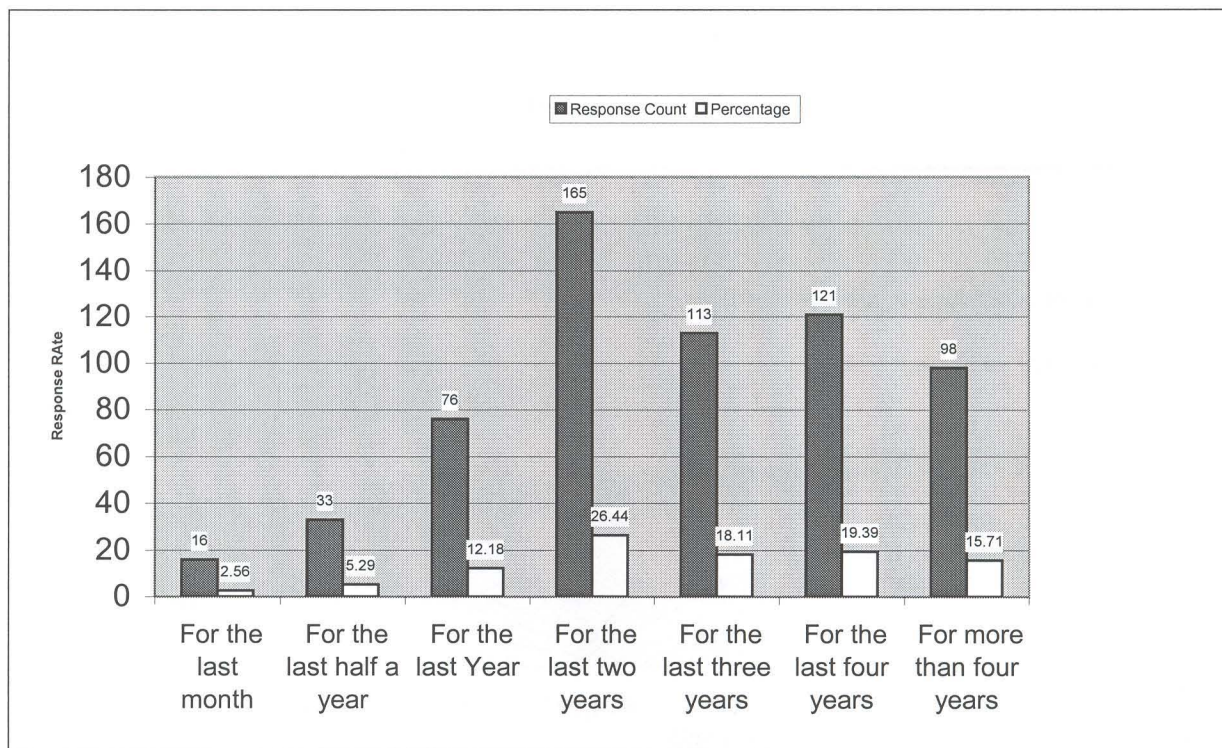
Chart 3.7 How Early Attendants Come to Cinema/Theater



Almost all (97.11%, 606) of the respondents reported that they never saw cinema screen advertisement that runs independently before the Cinema/ Theater starts (Q3.5II).

91.82%(573) of the respondents have an experience of more than a year as cinema/theater attendance.

Chart 3. 8 How Long as Cinema/Theater Audience



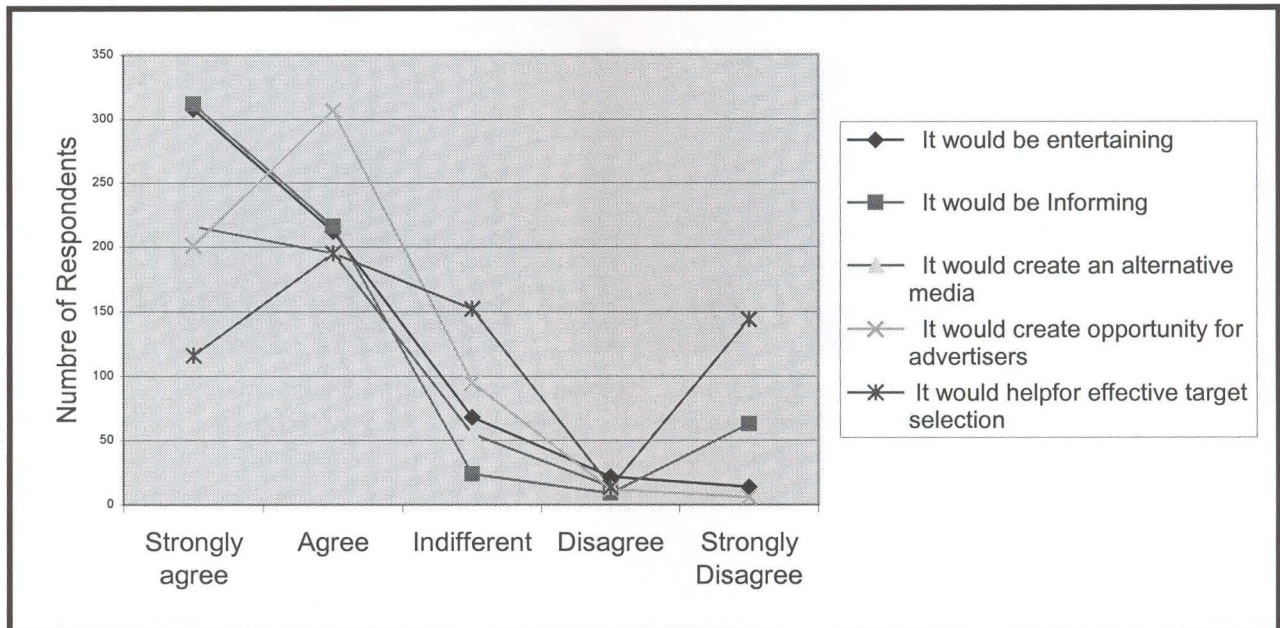
Asked what would they feel if screen advertisement runs on the cinema screen before the movie or the theater starts (Q3.6III), majority of them responded that they would be happy (34.46%, 215) or very happy (35.74%, 223) when 96.57%(41) reported that they would be very disappointed, and 9.93% (62) would be disappointed

The majority of the audience (73.87%, 461) attends Cinema/ Theater on the weekends, 68.43%(427) in the evenings, i.e. from 5:00 P.M to 8:00P.M, and they prefer to attend during the summer (50.96%) and winter (49.03%) seasons.

The respondents have strongly agreed that if cinema screen advertisements start, it would be entertaining (49.35%, 308), informing (50.00%, 312), create an alternative for an advertisement

(34.60%, 215), create an opportunity for advertisers (32.21%, 201), and help for effective reach (33.39%, 212).

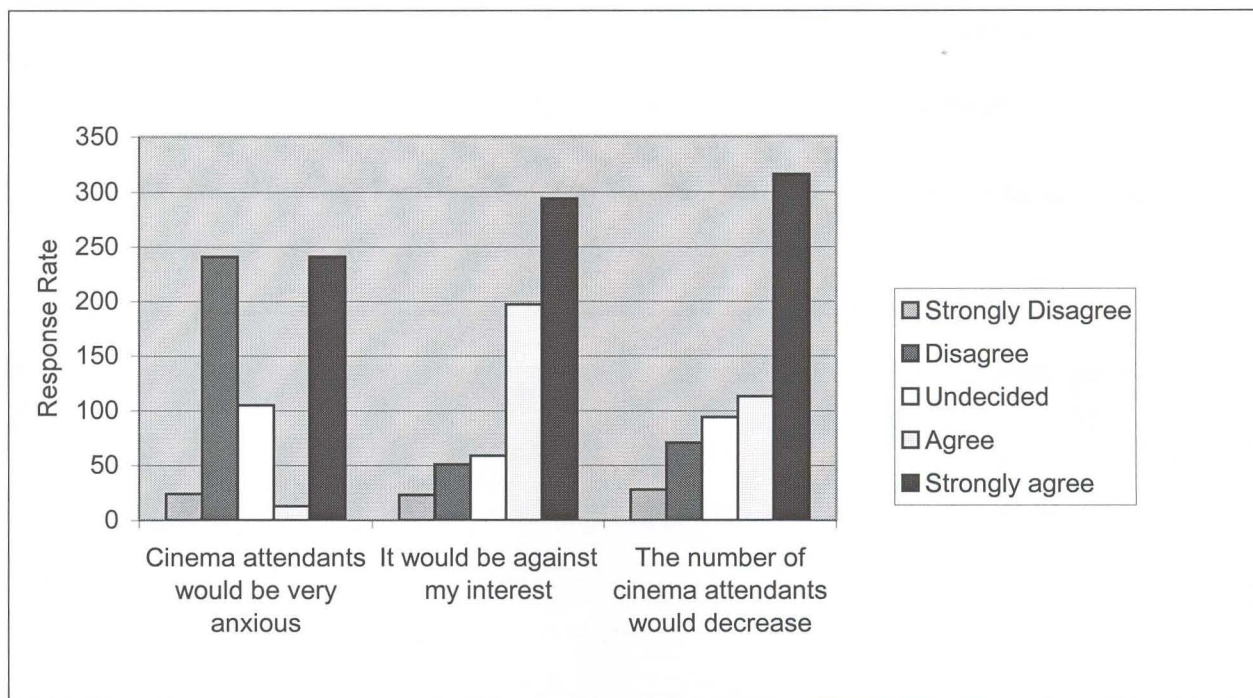
Chart 3. 9 Feelings if Cinema Screen Advertisements Would Start



In addition, the respondent respectively have agreed that the start of cinema screen advertisements would be entertaining (33.97%), informing (34.61%), create an alternative for an advertisement (31.25%), creates an opportunity for advertisers (49.20%), and help for an effective advertisement reach (31.41%).

On the other hand, respondents strongly disagreed that if cinema screen advertisements starts, cinema attendants would be anxious (38.61%, 241); it would be against their interests (47.11%, 294); and the number of cinema attendants would decrease (50.64%, 316)

Chart 3.10 Selected Responses to what if Cinema Screen Advertisement Starts



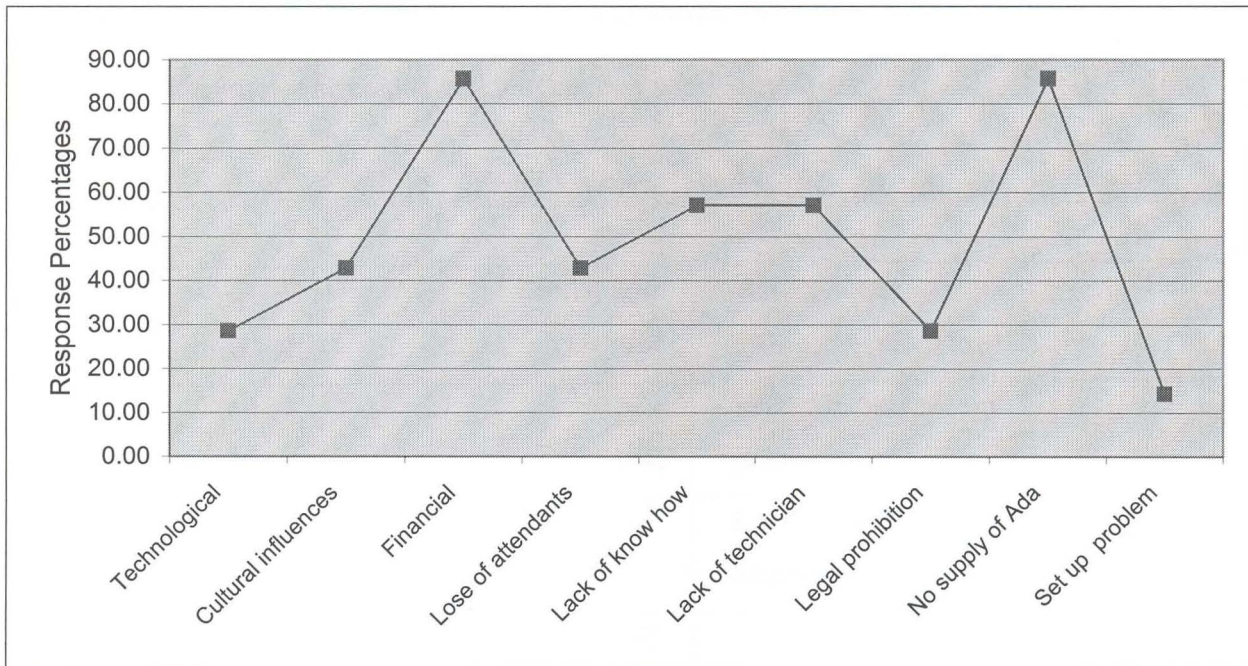
3.2 Result of Study II

The entire cinema/theater houses (seven) that were consulted have responded to the question, "Has your organization ever thought of cinema screen advertisement?" (Q1 II), unanimously that they did not. The same answer was given to the question that asks whether the cinema house administration has made any study or an assessment of potentials for cinema screen advertisement. In deed some, two of the seven, have stated that even though formal studies were not carried out to asses the market, there has been issues related to this that were discussed among the executives of the house to find ways and menses for increasing the revenue of the houses.

The administrators were also asked what they think are the major potential threats to start cinema screen advertisements. It was quit difficult for most of them to mention some may be

because they do not have deeper thought of it. Given some of the potential factors to rate (Q4II), however, all of them responded based on their experiences, observations, and technical capabilities. Their responses are summarized in the following chart.

Chart 3. 11 Potential Limiting Factors as Rated by Cinema/Theater Houses to Start Cinema Screen Advertisements



Accordingly, the major potential factors that are thought to affect the smooth start of cinema screen advertisements are financial limitations (85.71%), lack of supply of tailor made commercials/ advertisement slides (85.71%), and lack of technicians (57.14%) and know-how (57.14%). The same number of respondents assured that these would be the major threatening factors to start cinema screen advertisements in their respective cinemas / theaters.

To the question, “ What do you think are the major potential opportunities to start cinema screen advertisements?’(Q5II), they responded that they feel there would be lucrative

opportunity to start it because local cinema production is blossoming. Some commented that, if it has to be started, the right time is this time because they said that this time is” the time for cinema revolution “in Ethiopia. They stressed that the number cinema attendant has increased recently more than any time before in the Ethiopian history.

In an attempt to identify the strengths and weaknesses of the cinema/theaters (Q6&7II), the following major strengths and weaknesses were identified.

Table 3.1 Major strengths and weaknesses of cinema/theater houses to start cinema screen advertisements

Strengths	Percentage	Weaknesses	Percentage
Established halls	(100%)	Low professionalism	(71.42%)
Customer base	(85.71%)	High dependence on practitioners	(100%)
Good reputation	(71.42%)	Lack of Flexibility in administration	(42.85%)
Well known artists	(57.14)		
Equipments in place	(100%)		

3.3 Result of Study III

Just as the cinema /theater house administrations, most of the promotional enterprises that were contacted (81.81%) did not think of to start cinema screen advertisements. Their responses to the question,” Has your organization ever thought of screen advertisement?” (Q1III), was ‘no’. For this they reason out that it is not known in the country and no

advertiser has ever requested them to develop an advertisement slides for cinema screen advertisement.

No study has been made so far by the promotional enterprises that have aimed on the assessment of potentials for cinema screen advertisements (Q2III). One of the respondents, however, commented that had it not been because of lack of awareness of the advertisers, large money would have been generated through cinema screen advertisements in a country like Ethiopia where the audiences go to the cinema/theater houses almost an hour before the movie/theater starts.

The enterprises were also asked to rate some of the potential factors (Q3III) that have hindered the start of cinema screen advertisements. They rated the given factors as follows.

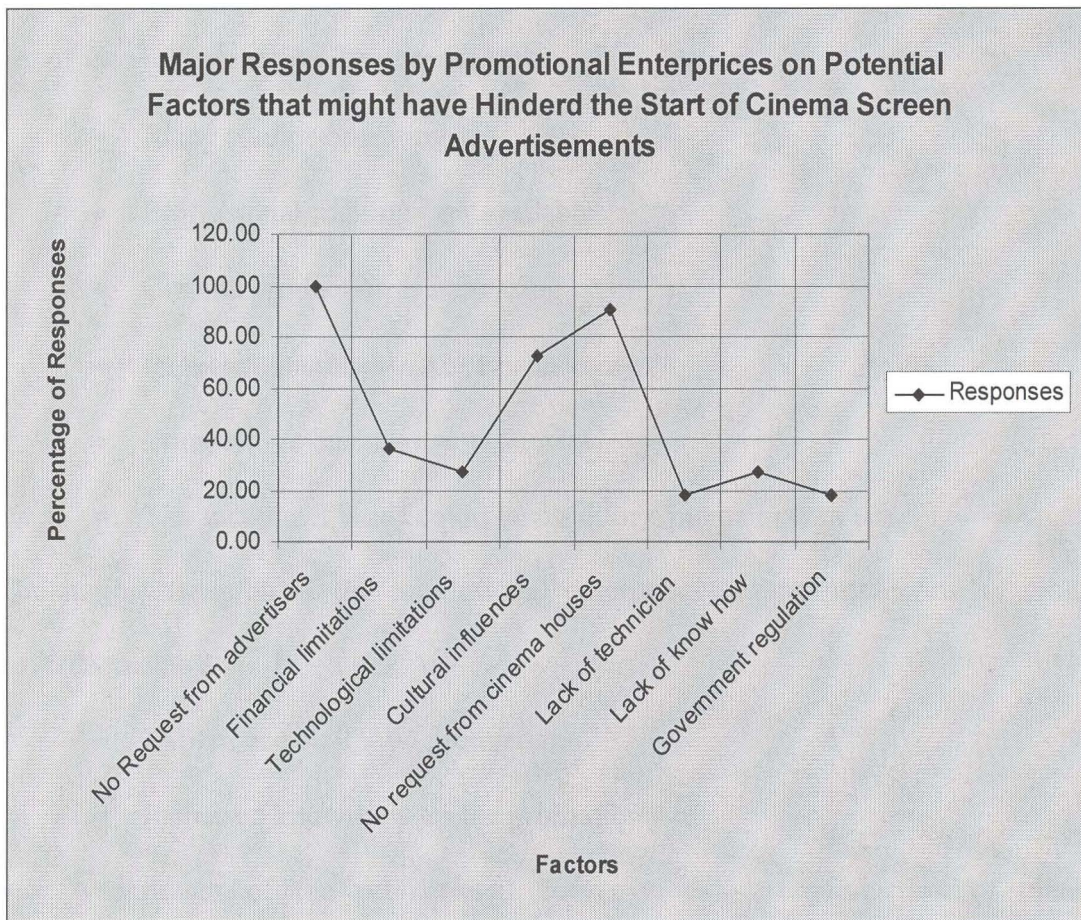
Table 3.2 Ratings of the major factors that might have hindered the start of cinema screen advertisements

Factors	Percentages
No Request from advertisers	100.00%
Financial limitations	36.36%
Technological limitations	27.27%
Cultural influences	72.73%
No request from Cinema/Theater houses	90.91%
Lack of technician	18.18%
Lack of know how	27.27%
Government regulation	18.18%

The respondents have indicated that the major factor that hinder the start of cinema screen advertisements They indicated that advertisers did not request for production of cinema screen advertisements (100%, 11), cinema houses have not come with request for such an advertisement (90.91%, 10) and because of fear of the cultural influences (72.73%, 8).

On the other hand, they responded that technological and financial limitations, government regulation, lack of know-how have been not among the major factors that hindered the start of cinema screen advertisements form the point of view of the promotional enterprises.

Chart 12



The major potential threat to start production of cinema screen advertisements, according to the promotional enterprises, is creation of awareness among the advertisers. Most of our business people, they said do not know such an alternative advertisement media.

If they are able to attract advertisers, the next threatening factor for these promotional enterprises could be the management aspect of running cinema screen advertisements at different cinema/theater houses. This they said highly depends on the capabilities and cooperation of the cinema/theater houses administrations on which they have a doubt.

The major potential opportunities to start developing cinema screen advertisements from the point of view of promotional enterprises are:

- Many studios operating
- Professional trainings are available
- Cinema production is increasing
- Increasing number of cinema audience
- Competitive business environment
- The fact that TV ads could be used for Cinema Screen ads.

The major strengths of the promotional enterprise to start production of cinema screen advertisements are:

- Experience on TV ad production
- Increased know-how on the promotional art

Major weaknesses of the promotional enterprise to start production of cinema screen advertisements as identified by the promotional enterprises are:

- Lack of close cooperation and integration with cinema/theater houses
- Limited marketing professionals who can uphold the art and ethics of advertisement to the Ethiopian diverse culture, values and demographics.

CHAPTER IV

DISCUSSION

The result of the study indicates that most of the cinema audiences are male. Most of the times the male gender makes the purchase decisions in the Ethiopian tradition. In fact the number of female audience is significant (46.15%). Half of the cinema/theater audiences fall to the age group of 26-40. This age group is very active in terms of making purchase decisions.

One study conducted in the United States of America³¹ shows that the total number of Americans who went to the movies in a month reached 95 million people and moviegoers are a younger, affluent, active consumer group representing an extremely attractive advertising target. According to this study moviegoers are much more likely to be younger than 35 years of age and consumers notice their enriched cinema environment...and they don't mind the advertising in cinema as something against their interests. Consumers spend "quality time" at the theater. On average moviegoers arrive in the theater 19 minutes before the movie starts.

Even though the researcher does not have the exact statistics of the number of cinemagoers in Addis Ababa, it is estimated to be not less than 50,000 a week. It is true that most of the cinemagoers are affluent, active consumer group. The result of study I indicated that most of the cinemagoers are in the age group of 26-40(Chart 3.1) and most of them feel happy if cinema screen advertisement starts. The audience comes to the cinema or the theaters mostly twenty minutes before he start of the movie or the theater (see Chart 3.7). The quality time that the audiences are spending being idle in the darkened auditorium should be use for the purpose of generation an income.

³¹ Studio Movie Grill, Cinema Advertising: Viewer Demographics, <jheath@studiomoviegrill.com>

Screen advertising is literally the only place you can catch the attention of active, upwardly mobile, young adults, at leisure - resulting in an unaided recall level exceeding 90% compared to less than 20% for most advertising.³²

The majority of cinema /theater audiences are employees who may earn salary or wage. This indicates that they can have purchasing power of the products or services that would be advertised on the cinema/theater screen.

The cinema/theater houses administrations have indicated that the number of cinema/theater audience has increased significantly. Study by Val Morgan has indicated the same. He states that cinema attendance worldwide has increased rapidly in recent years and this growth in attendance has seen a parallel increase in the utilization of cinema as an advertising medium (Val Morgan 1996)³³. This is believed to be one of the sources of revenue for the cinema/theater houses if utilized on the advertisements aspects. The promotional enterprises also pointed out that the major limiting factors that have hindered the cinema screen advertisement are the fact that awareness of the advertisers on cinema screen as medium of advertisement is very low and there has not been any request or sense of cooperation and collaboration from the cinema/theater houses to use their resources for the tripartite benefit.

As indicated in the result section, even though most of the respondents have got TV set at home, only one third of them watch the TV programs very often that may not include the commercial breaks. It is noticeable that the viewers are some times irritated by the very high frequency of aired commercials during public holidays and special events. Some TV owners publicly comment that the program mix of the ETV is very poor mainly because of the domination of the commercials in the program. As a result ETV commercials are less attended. This is one of the indications that advertisers need to look for other medium of advertisements.

³²Coming Soon: More Ads Tailored to Your Tastes," American Demographics , August ,2001
< <http://www.ignitingministry.org/pdf/theateradvertising.pdf>>

³³ Val Morgan (1996) Cinema Advertising, Personal Communication, New York,

Televised commercials are misunderstood or miscomprehended because of factors such as a fleeting message, clutter and limited viewers' attentions (Belch and Belch, 2001)³⁴ and every one of the six televised commercial communication is miscomprehended and the average amount of miscomprehension associated with any given communication is unexpectedly high for diverse respondents besides to the finite limit that exists to the amount of commercial information consumers can effectively use (Jacoby and Hoyer, 1982)³⁵..

In addition, advertisers cannot be selective on their ETV ads because it is aired to the entire citizen attending the TV program. Nationally advertising a product or service in fact can have an advantage of wider reach. The disadvantage it has got however on the issue of segmenting or target selection. For example, Robertson and Rositer (1974)³⁶ found that, when a child attributes persuasive intent to commercials, he/she believes them less, likes them less, and is less likely to want the product advertised. This may have an influence on the purchase decision of the children when they grow up. The commercials on ETV are highly repetitive until the viewers hate them and turn off their TV not to see them again. Studies however indicate that seeing a single commercial produces more favorable reaction but further exposure to commercials does not increase this effect (And Goldberg and Gorn, 1978)³⁷.

These all indicate that, an alternative for audio-visual advertisement medium has to be found and utilized in Ethiopia in addition to the customary ETV. For this cinema screen advertisements can help a lot where the audience is increasing, private cinema houses are emerging and local cinema production is blooming

³⁴ Gorge E Belch and Michael A. Belch (2001), Advertising and Promotion: An Integrated Marketing Communication Perspective, 5th Ed., Boston, and McGraw Hill.

³⁵ Jakob Jacoby and Wayne D. Hoyer, Viewers miscomprehension of Televised Communications: selected findings, Journal of Marketing, Vol.46 (Fall 1982), pp.12-26

³⁶ Thomas S. Robertson and John R. Rositer, Children and Commercial Persuasions: An Attribution Theory Analysis, Journal of Consumer Research, Vol.1, June 1974, pp. 13-21

³⁷ Marvin E. Goldberg and Gerald J. Gorn, Children's Reaction to Television Advertisements: An Experimental Approach, Journal of Consumer Research, Vol.1, June 1974, pp. 37-46

Some researchers have argued that cinema possesses a number of advantages which make it a more attractive medium than has thus far been recognized (Johnson 1981)³⁸. So far in Ethiopia, only few of Amharic language cinemas have got advertisements on them. The promotional enterprises have commented that inclusion of advertisement on cinemas is too costly for the advertisers and it does not allow flexibility as cinema screen advertisements. It may lead to the development of an attitude towards the cinema that may be or may not be favorable as a result of the fact that the advertisement is permanently in built in the cinema. In addition, it very likely that such advertisements will be prone to zipping. Cinema screen advertisements however are free of these as they are run independently of the cinema or the theater that they precede or follow

Pre show programmes in cinema are very common in the developed world. In the U.S., for example, approximately 25,000 screens have pre-show advertising programs - with most showing slides.³⁹ It will not be a surprise to our cinema audiences to start pre shows to the scheduled cinemas or theaters.

It has to be noted however that advertisements only offer us a text; it is our own experiences and knowledge that allow us to make meaning out of what we see.⁴⁰ Vestergaard and Schroeder argue that all mass media are dependent on the co-operation of their readers for their success ... why should people bother if they get nothing out of it, if somehow the meaning communicated didn't respond to the attitudes, hopes and dreams of those reading media messages? The content of the mass media can therefore be seen as a celebration of common experiences, of socially shared dreams and hopes, which are validated for their readers by this celebration. (Vestergaard and Schroeder, 1985:120)⁴¹ But at the early beginning, the producers of advertisement messages to be communicated through cinema screen advertisements, due care must be given so as not to initiate bad attitude toward it.

³⁸ Johnson, K (1981). Cinema Advertising. *Journal of Advertising*, 10, 11-19.

³⁹ Coming Soon: More Ads Tailored to Your Tastes," *American Demographics*, August, 2001
<<http://www.kodak.com/US/en/motion/news/screenMediaP.shtml>>

⁴⁰ <<http://www.aber.ac.uk/media/Students/rwh9501.html>>

⁴¹ Vestergaard, T & K Schroder (1985): *The Language of Advertising*. Oxford: Basil Blackwell

Cinema/theater houses under the public administration, that constitute about 27% of the total cinema/theater houses in Addis Ababa, should make use of this opportunity as means of generation of revenue besides to the renting of their halls to promotional enterprises that are airing their own cinema to support their financial requirements that they have been expecting from the hands of the government.

They have indicated that the major factors that have been hindering the start of cinema screen advertisements from their side are the limitation in finance and the lack of promotional institutions (see chart 3.11) that supply cinema screen slides or clips. Otherwise they have the necessary equipments in place in established halls with good reputation and customer base (see T able 3 .1). But p rofessional d evelopment and a daptive administration systems are among what need to be improved.

On the part of the promotional enterprises, too much is expected to widen their area of involvements. The major challenge is increasing advertisers' awareness on the importance of cinema screen advertisements as an alternative medium of advertisements. If enough awareness is raised, it looks very easy to them to produce cinema screen advertisements because they have the know-how from the production of TV commercials, competition is increasing, cinema production and audiences are increasing, and professional studios are opened.

The result also indicates that the promotional enterprises should work in cooperation and integration to realize their common opportunities. Professionalism in advertisement has to be well developed among the promotional enterprises. Capacity to launch an awareness program needs to be developed.

In general, the result indicates that if the necessary preparations by the cinemas/theaters and the promotional enterprises are done and co-operations are established between the two having the audience and the advertisers in common, the potential for cinema screen advertisement already exists and the market for this is attractive.

CHAPTER V

CONCLUSION AND RECOMMENDATION

5.1 Conclusion

The Result of the study has indicated that most of the cinema/theater audiences are in the very active age group, employees of different institutions, who're likely to have the purchasing power. In addition, most of them are not well educated to resist to an advertisement messages. The audiences are think that the advertisement frequency on the Ethiopian Television is very high that they usually try to avoid it by rarely tuning to it.

The cinema attendants are increasing as the cinema production is increasing. Most of the audiences attend more than three cinema/theater houses very often and they avail themselves at the cinema/theater houses when at least twenty minutes are remaining to start the movie or the theater. This provides to the potential advertisers an ample time to run cinema screen advertisement to these potential buyers of the product or service being advertised. Most of the respondents feel very happy if cinema screen advertise starts.

The same is true for the Cinema/Theater Houses administrations and the promotional Enterprises because they could earn money by running and producing cinema screen advertisements. If awareness is created among advertisers and the cinema houses administration, the promotional enterprises are capable of producing commercials for cinema screen advertisements. The cinema/theater houses can start running screen advertisements as pre-show to the movies or the theater at ease. There are no significant

factors that can affect negatively the start of cinema screen advertisements other than those mentioned above.

The promotional enterprises as well as the administrations of the cinema/theater houses do understand that the start of cinema screen advertisement will be lucrative are for generation of additional revenues at very less cost and effort. Particularly public cinemas/theaters that are allotted a budget from the government can find it very substantial in supporting themselves by decreasing their dependence on the government budgets.

The high dependence on ETV for products and/or services advertisement cannot help much in the competitive economic policy environment where every company wants to be heard by its target market. All companies have been communicating about their products and services through one audiovisual broadcasting channel in Ethiopia. This naturally has a problem of effective targeting and segmenting and it has been costly. It is time, therefore for advertisers to search for an other medium of advertisements that can combine the audio and visual component for the high impact while providing the demonstration of products and services features. For this, cinema screen advertisements come first to thought of the advertisers. And the utilization of this opportunity should not be delayed.

In general, the results of all the three parts of the study strongly support the hypothesis that there is a potential for cinema screen advertisement in Addis Ababa. This can safely be generalized to there exists a potential for cinemas screen advertisements in Ethiopia. The very good grounds for this broad generalization are:

- (a) the fact that cinema houses out of Addis Ababa are located only in the major towns of the regional governments and they are very similar in their administration and setup as the public cinema/theater houses in Addis Ababa,
- (b) all the major promotional enterprises that are capable of producing the commercials for cinema screen advertisements are located in Addis Ababa and
- (c) the advertisers, i.e. the companies who are able and willing to advertise on cinema screens are in Addis Ababa or have their agents in Addis Ababa.

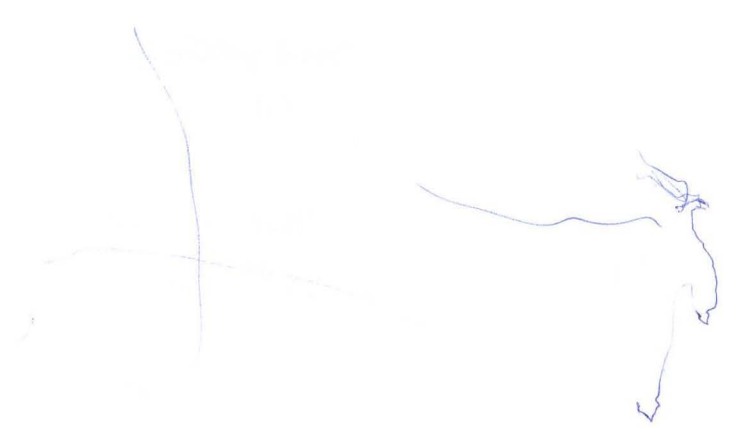
But it has to be noted that this is not to mean there is no need for customization of those commercials that would be run at regional cinema houses to make the adaptation to the local preferences, sub culture, language, ethnic values and different out looks. In deed further study is required for this. The last word for this study is that there exists a potential for cinema screen advertisements in Ethiopia.

5.2 Recommendations

To effectively utilize the opportunities in cinema screen advertisements in Ethiopia, the following recommendation are in force.

- An awareness creation campaign to attract potential advertisers from all private, public and nongovernmental organizations has to be organized and benefits of using cinema screen advertisement has to be communicated well to generate demand for advertisements in this medium. This could be done by the joint effort of the promotional enterprises and cinema/theater houses.
- Sprit of cooperation and partnership has to be developed between and among the promotional enterprises and the cinema/theater house administration to maximize their common interests and benefits.

- Further studies have to be made on the customization of cinema screen advertisements based on the audience demographics, seasons, the movie and theater types, location of the cinema/theater houses, etc. to make sure that the advertisement messages reach the target effectively and have the right impact.
- Promotional enterprises should arrange and come to an agreement with the cinema houses or theaters on how to run the presentation of cinema screen advertisements. The promotional enterprises may lease the facilities of the cinemas or theaters or they may directly sell the commercials that they have produced to the cinemas or theaters so that the cinemas or the theaters may possibly schedule for and run the presentations themselves. Whichever way is convenient to the two parties as well as to the advertising companies has to be agreed up on and formalized before an attempt is made to start cinema screen advertisements.
- Market study that focuses on the assessment of feasibility has to be conducted so as to measure how much attractive this potential market is to invest on it.



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Annex I- Responses to Interview questionnaire for study I

Result of Study I

PART 1

	Total responses	624	Percentage
1.1 Gender			
A) Male	336		53.85
B) Female	288		46.15
Age group			
A) 14-18years	69		11.06
B) 19-25 years	186		29.81
C) 26-40 years	307		49.20
D) 41-60 years	51		8.17
E) Above 60 years	11		1.76
1.3 Marital Status			
A) Married	203		32.53
B) Single	316		50.64
C) Widowed	17		2.72
D) Divorced	88		14.10
1.4 Have child/children?			
A) Yes	432		69.23
B) No	192		30.77
1.5 Occupation			
A) Student	216		34.62
B) Employee	327		52.40
C) Entrepreneur	26		4.17
D) Other,	55		8.81
1.6 Educational Level			
A) Below12/10	114		18.27
B) 12 or 10 complete	245		39.26
C) Diploma holder	152		24.36
D) First-degree holder	94		15.06
E) Second degree and above	19		3.04
1.7 Where do you live currently?			
A) In Addis Ababa	516		82.69
B) Out of Addis Ababa	93		14.90
C) Out of Ethiopia	15		2.40

Result of Study I

PART 2

2.1 Have television set at home

A) Yes	427	68.43
B) No	197	31.57

2.2 How often do you watch Ethiopian Television?

A) Always	79	12.66
B) Very often	193	30.93
C) Rarely	211	33.81
D) Very rarely	133	21.31
E) Not at all	8	1.28

2.3 Know what an advertisement mean

A) Yes	599	95.99
B) No	25	4.01

2.4 Evaluation of ETV advertisements

	Strongly Agree	agree	Undecided	Disagree	Strongly Disagree
a ETV advertisements are attractive	24	241	105	13	241
b ETV advertisements are interesting	201	51	8	52	312
c ETV advertisements are entertaining	312	216	7	24	65
d ETV advertisements are convincing	196	166	16	28	218
e ETV advertisements are unforgettable	216	195	55	14	144
f ETV advertisements are believable	19	49	299	238	15
h ETV advertisements are persuasive	37	366	151	28	42
i ETV advertisements are funny	212	308	68	22	14
j ETV advertisements are distinctive	38	175	291	49	71
k ETV advertisements are boring	21	29	211	311	52
l ETV advertisements are the key source of business information	201	307	95	12	6
m ETV advertisements quality has declined	162	201	41	200	18
n Advertisements dominate ETV programs	393	202	21	7	1
o Alternative should be found for motion advertisements in Ethiopia	323	123	93	14	71

2.5 Have interest in ETV advertisements/Commercials

A) Yes	394	63.14
B) No	230	36.86

Frequency of advertisement on ETV

A) Very high	316	50.64
B) High	210	33.65
C) Moderate	62	9.94
D) Low	35	5.61
E) Very low	1	0.16

2.7 Why watch ETV advertisement

A) I watch it for fun	213	34.13
B) I watch it for business information	94	15.06
C) I watch it for buying decision-making	72	11.54

An Assessment of Potentials for Cinema Screen Advertisements in Ethiopia

D) I watch it for the background music	73	11.70
E) I watch it because I love the actors and actress doing the commercial	53	8.49
F) I watch it for because I have no choice	71	11.38
G) I watch it for because it is related to my job/profession	38	6.09

3.1 How often attend Cinema/theater

A) Always	213	34.13
B) Very often	106	16.99
C) Often	103	16.51
D) Rarely	173	27.72
E) Very rarely	29	4.65

3.2 How many cinema houses been to

1	3	0.48
2	45	7.21
3	203	32.53
4	273	43.75
5	46	7.37
6	24	3.85
7	9	1.44
8	9	1.44
9	7	1.12
10	4	0.64

3.3 How early do you come to the cinema/ theater?

A) 5 minutes	9	1.44
B) 10 minutes	27	4.33
C) 15 minutes	75	12.02
D) 20 minutes	297	47.60
E) 25 minutes	166	26.60
F) 30 minutes	43	6.89

3.4 For how long have you been attending cinema/theater?

For the last month	16	2.56
For the last half a year	33	5.29
For the last Year	76	12.18
For the last two years	165	26.44
For the last three years	113	18.11
For the last four years	121	19.39
For more than four years	98	15.71

3.5 Have you ever seen screen advertisement that runs independently before the Cinema/ Theater starts?

Yes	18	(2.88)
No	606	(97.11)

3.6 If your answer is no to the above question, what would you feel if screen advertisement runs on the cinema screen before the movie or the theater starts?

I would be very disappointed	41	6.57
I would be disappointed	62	9.93
I would be indifference	83	13.30
I would be happy	215	34.46
I would I be very happy	223	35.74

3.7 When do you go to cinema houses most often?

Summer	318	(50.96)	Day time	197	(31.41)
			Holy days	173	(27.72)

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Winter 306(49.03) Evening 427(68.43) Weekends 461(73.87)

3.8 What would be your response to the below statement if screen advertisement is run in cinema house before the movie or the theater starts?

	Strongly Agree	agree	Undecided	Disagree	Strongly Disagree
It would be entertaining	308	212	68	22	14
It would be Informing	313	216	4	9	63
It would create an alternative media for advertisement	215	195	55	14	144
It would create opportunity for advertisers	201	307	95	12	6
It would be an alternative for advertisers for effective target selection	116	195	152	14	144
It would be Boring to the attendants of the cinema	312	226	7	24	65
Cinema attendants would be very happy	201	308	95	12	6
Cinema attendants would be very anxious	24	241	105	13	241
It would be against my interest	23	51	59	197	294
It would help for effective target selection	82	169	293	56	24
It would help for effective reach	212	196	198	12	6
The number of cinema attendants would decrease	28	71	94	113	316
People would come to cinema houses to watch Advertisements	104	84	97	124	215
ETV would loose its income from advertisements	341	196	59	19	9
There would be little technology to do it	17	55	214	241	97
The cost of advertisement on ETV would decrease	241	296	40	34	9
People would be more influenced by cinema screen advertisements	38	62	274	185	64

Annex II- Questionnaire used for Study I

Addis Ababa University
Faculty of Business and Economics
Masters of Business Administration (MBA) Program

This questionnaire is prepared to collect responses of cinema/theater attendants to conduct a study on the title "Cinema Screen Advertisement Potential in Ethiopia." Your cooperation is vital for the success of the study. You are therefore kindly requested to spare your valuable time to fill this questionnaire. Please fill it as honestly as possible. The result of this study may be of benefit to you in one way or another.

Please give your answer by placing a tick (✓) mark wherever this box (☐) appears.

Thank you in advance for your cooperation and responses.

PART 1

1.1 Gender Male ☐ Female ☐

1.2 Please indicate your age group

- 14-18 years ☐
- 19-25 years ☐
- 26-40 years ☐
- 41-60 years ☐
- Above 60 years ☐

1.3 Marital Status

- Married ☐
- Single ☐
- Widowed ☐
- Divorced ☐

1.4 Do you have child/children? Yes ☐ No ☐

1.5 Occupation

- Student ☐
- Employee ☐
- Entrepreneur ☐
- Other, ☐ Specify _____

1.6 Educational Level

- ☐ Below 12/10
- ☐ 12 or 10 complete
- ☐ Diploma holder
- ☐ First-degree holder
- ☐ Second degree and above

1.7 Where do you live currently?

- In Addis Ababa ☐
- Out of Addis Ababa ☐
- Out of Ethiopia ☐

PART 2

2.1 Do you have television set at home? Yes No

2.2 How often do you watch Ethiopian Television?

- Always
- Very often
- Rarely
- Very rarely
- Not at all

2.3 Do you know what an advertisement mean? Yes No

2.4 Evaluation of ETV advertisements

If you ever watched Ethiopian Television (ETV), how do you feel about the following statements?

	Statement	Strongly agree	Agree	Undecided	Disagree	Strongly disagree
a	ETV advertisements are attractive					
b	ETV advertisements are interesting					
c	ETV advertisements are entertaining					
d	ETV advertisements are convincing					
e	ETV advertisements are unforgettable					
f	ETV advertisements are believable					
h	ETV advertisements are persuasive					
i	ETV advertisements are funny					
j	ETV advertisements are distinctive					
k	ETV advertisements are boring					
l	ETV advertisements are the key source of business information					
m	ETV advertisements quality has declined					
n	Advertisements dominate ETV programs					
o	Alternative should be found for motion advertisements in Ethiopia					

2.5 Are you interested in ETV advertisements/Commercials? Yes No

2.6 How do you judge frequency of advertisement on ETV?

- Very high
- High
- Moderate
- Low
- very low

2.7 Why do you watch ETV advertisement?

- I watch it for fun
- I watch it for business information
- I watch it for buying decision-making
- I watch it for the background music
- I watch it for because I love the actors and actress doing the commercial
- I watch it for because I have no choice
- I watch it for because it is related to my job/profession

Part 3

3.1 How often are you attending Cinema/theater?

- Always
- Very often
- Often
- Rarely
- Very rarely

3.2 How many cinema houses have you been to?

- Please tick in one.
- | | | | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

3.3 How early do you come to the cinema/ theater?

- 5 minutes
- 10 minutes
- 15 minutes
- 20 minutes
- 25 minutes
- 30 minutes

3.4 For how long have you been attending cinema/theater?

- For the last month
- For the last half a year
- For the last Year
- For the last two years
- For the last three years
- For the last four years
- For more than four years

3.5 Have you ever seen screen advertisement that runs independently before the Cinema/ Theater starts?

- Yes No

3.6 If your answer is no to the above question, what would you feel if screen advertisement runs on the cinema screen before the movie or the theater starts?

- I would be very disappointed
- I would be disappointed
- I would be indifference
- I would be happy
- I would I be very happy

3.7 When do you go to cinema houses most often?

- | | | |
|--|-----------------------------------|------------------------------------|
| A | B | C |
| <input type="checkbox"/> During summer | <input type="checkbox"/> Day time | <input type="checkbox"/> Holy days |
| <input type="checkbox"/> During winter | <input type="checkbox"/> Evenings | <input type="checkbox"/> Weekends |

An Assessment of Potentials for Cinema Screen Advertisements in Ethiopia

3.8 What would be your response to the below statement if screen advertisement is run in cinema house before the movie or the theater starts?

	Statement	Strongly agree	Agree	Indifferent	Disagree	Strongly disagree
a	It would be entertaining					
b	It would be Informing					
c	It would create an alternative media for advertisement					
d	It would create opportunity for advertisers					
e	It would be an alternative for advertisers for effective target selection					
f	It would be Boring to the attendants of the cinema					
g	Cinema attendants would be very happy					
h	Cinema attendants would be very anxious					
i	It would be against my interest					
j	It would help for effective target selection					
k	It would help for effective reach					
l	The number of cinema attendants would decrease					
m	It would come to cinema houses to watch Advertisements than to watch movies or Theaters					
n	ETV would loose its income from advertisements					
o	There would be little technology to do it					
p	The cost of advertisement on ETV would decrease					
q	People would be more influenced by cinema screen advertisements than by ETV advertisements					

አዲስ አበባ ዩኒቨርሲቲ
 የቢዝነስና ኦኮኖሚክስ ፋኩልቲ
 የማስተራት (MBA) ሮግራም

ይህ ቃለመጠይቅ የሲኒማ ቤቶች የአስክሪን ላይ ማስታወቂያ በኢትዮጵያ አዋጭ መሆኑን ወይም አለመሆኑን ለማጥናት የሚሆን የሲኒማና የቲያትር ታዳሚዎች እንዲሞሉት የተዘጋጀ ነው። የአርስዎ ትብብር ለጥናቱ ስኬታማነት በጣም አስፈላጊ ነው። ስለዚህ ከውድ ጊዜዎን ጥቂቱን ይህን ቃለመጠይቅ ለመሙላት እንዲያውሉ በታላቅ ትህትና ተጠይቀዋል። በቅንነት ይህን ቃለመጠይቅ በመሙላት ለሚያደርጉት ትብብር ደግመን እያመሰገንን የጥናቱ ውጤት ለአርሶም በቀጥታ ወይም በተዘዋዋሪ ጠቀሜታ ሊኖረው እንደሚችል እምነታችን ነው።

እባክዎን ይህ ምልክት ባለበት ሁሉ የራይት ምልክት (✓) በመጻፍ ይመልሱ።

ለትብብርዎና ለሚሰጡት ምላሾች በቅድሚያ እናመሰግናለን።

ክፍል አንድ

1.1 እባክዎን የታዎን ይግለጹ ወንድ ሴት

1.2 እባክዎን የዕድሜ ክልልዎን ይግለጹ

- ከ18 ዓመት በታች
- ከ19-25 ዓመት
- ከ26-40 ዓመት
- ከ41-60 ዓመት
- ከ60 ዓመት በላይ

1.3 የጋብቻ ሁኔታ

- ያገባ/ ያገባች
- ያላገባ/ ያላገባች
- የተፋታ/ የተፋታች

1.4 ልጅ አለዎት? አለኝ የለኝም

1.5 የሥራ መስክ

- ተማሪ
- ተቀጣሪ
- ባለሃብት
- ሌላ እባክዎን ይግለጹ _____

1.6 የትምህርት ደረጃ

በጣም እናመሰግናለን።

- ከ10ኛ/ከ12 ክፍል በታች
- 10ኛ/12ኛ የጠናቀቀ
- ዲፕሎማ
- የመጀመሪያ ዲግሪ
- ሁለተኛ ዲግሪ እና ከዚያ በላይ

1.7 አሁን የት እየኖሩ ነው?

- አዲስ አበባ ውስጥ
- ከአዲስ አበባ ውጪ
- ከኢትዮጵያ ውጪ

ክፍል ሁለት

2.1 እቤትዎ ቴሌቪዥን አለዎት? አለኝ የለኝም

2.1 ቴሌቪዥን የሚመለከቱት

- ሁሌ
- ብዙ ጊዜ
- አልፎ አልፎ
- ጥቂት ጊዜ
- ጨርሶ አልመለከትም

2.3 የቴሌቪዥን ማስታወቂያ ማለት ምን ማለት እንደሆነ ያውቃሉ? አውቀለሁ አላውቅም

2.4 የኢትዮጵያ ቴሌቪዥንን የሚመለከቱ ከሆነ፣ በኢትዮጵያ የሚተላለፉ ማስታወቂያዎችን በተመለከተ ከዚህ በታች ለተመለከቱት አረፍተነገሮች ከተቀመጡት አማራጭ የእርስዎ ስሜት በሚገልጽ በአንዱ ላይ ምልክት ያድረጉ።

	በጣም እስማማለሁ	እስማማለሁ	ግድ የለኝም	እቃወማለሁ	በጣም አቃወማለሁ
የ (ETV) ማስታወቂያዎች የሚሰጡ ቸው					
የ(ETV) ማስታወቂያዎች አስዳሳች ናቸው					
« አዝናኝ ናቸው					
« አሳማኝ ናቸው					
« የማይረሱ ናቸው					
« ታማኝ ናቸው					
« ጎትጎት ናቸው					
« አስቂኝ ናቸው					
« ልዩ ናቸው					
« ወሳኝ መረጃዎች ናቸው					
« በዝተዋል					
« አማራጭ መፈለግ ያስፈልጋል					

3.6 መልስዎ ከላይ በ3.5 ለተጠየቀው «አላውቅም» ከሆነ በቲያትር ሲኒማ ቤቶች ቲያትር ወይም ፊልም ከመጀመሩ በፊት በቴሌቪዥን የሚታዩ ማስታወቂያዎች ሲታዩ ምን ይስማማታል?

- በጣም እበሳጫለሁ::
- እበሳጫለሁ::
- ግድ የለኝም::
- ደስ ይለኛል::
- በጣም ደስ ይለኛል::

3.7 በአብዛኛው ወደ ቲያትር/ሲኒማ ቤት የሚሄዱት

- | | | | | | |
|-------------|--------------------------|----------|--------------------------|-------------|--------------------------|
| ሀ. በክረምት ጊዜ | <input type="checkbox"/> | ለ. ቀን ቀን | <input type="checkbox"/> | ሐ. በበዓል ቀናት | <input type="checkbox"/> |
| በበጋ ጊዜ | <input type="checkbox"/> | ማታ ማታ | <input type="checkbox"/> | ቅዳሜና እሁድ | <input type="checkbox"/> |

3.8 በሲኒማ ቤቶች የእስክሪን ላይ ማስታወቂያ (በኢ.ቲ.ቪ የሚተላለፍ አይነት ማስታወቂያ) ከተከተለው/ከፊልም በፊት መታየት ቢጀምር ምን ሊሰማዎ እንደሚችል ከዚህ በታች ከተዘረዘሩት ዓረፍተ ነገሮች ጋር ከቀረቡ አማራጮች በአንዱ ትይዩ የራይት ምክት (✓) በማስቀመጥ ይጠቀሙ::

	በጣም እስማማለሁ	እስማማለሁ	ግድየለኝም	እቃወማለሁ	በጣም እቃወማለሁ
ሀ. አዝናኝ ይሆናል					
ለ. መረጃ ሰጪ ይሆናል					
ሐ. ለማስታወቂያ አማራጭ ይሆናል					
መ. ለምርትና አገልግሎት አስተዋዋቂዎች ተጨማሪ እድል ነው					
ሠ. ማስታወቂያዎች ለተመልካች እንዲደርሱ ይረዳል					
ረ. ለሲኒማ ታዳሚዎች አሰልፎ ይሆናል					
ሰ. የሲኒማ ታዳሚዎች ደስተኛ ይሆናሉ					
ሸ. የሲኒማ ታዳሚዎች በጣም ያዝናሉ					
ቀ. ከሲኒማ ታዳሚዎች ፍላጎት ውጪ የሚደረግ ይሆናል					
በ. የማስታወቂያ ታዳሚን በትክክል ለማግኘት ያስችላል					
ተ. ማስታወቂያዎች በትክክል ይደመጣሉ					
ቸ. የሲኒማ ታዳሚዎች ቁጥር ይቀንሳል					
ነ. የኢትዮጵያ ቴሌቪዥን ገቢው ይቀንሳል					
ኘ. ለመተግበር በቂ ቴክኖሎጂ አይኖርም					
የ. ለኢትዮጵያ ቴሌቪዥን የማስታወቂያ ዋጋ ይቀንሳል					
ደ. ሰዎች ከኢ.ቲ.ቪ ማስታወቂያ ይልቅ በሲኒማ እስክሪን ማስታወቂያ የበለጠ ይጠቀማሉ					

እጅግ በጣም እናመሰግናለን::

Annex III-Structured interview questions used for Study II

STRUCTURED INTERVIEW QUESTIONS FOR CINEMA HOUSE ADMINISTRATION

1. Have your organization ever thought of screen advertisement?
2. Is there any study made so far for the assessment of potentials for cinema screen advertisement?
3. What limiting factors are there to hinder the cinema house to run screen advertisements?
 - Financial limitations
 - Technological
 - Cultural influences
 - Little time to do so
 - Lack of technician
 - No supply of ads from promotional enterprises
 - Fear of lose of attendants
 - Lack of know how
 - Government regulation
 - Legal prohibition
 - The cinema House set up (arrangement) problem
 - Others, please mention
4. What do you think are the major potential threats to start cinema screen advertisements?
5. What do you think are the major potential opportunities to start cinema screen advertisements?
6. What are the major strengths of the cinema House to start cinema screen advertisements?
7. What are the major weaknesses of the cinema House to start cinema screen advertisements?
6. If you have planned to start cinema screen advertisement, when would you like to start?

Annex IV-Structured interview questions used for Study III

STRUCTURED INTERVIEW QUESTIONS FOR PROMOTIONAL ENTERPRISES

1. Has your organization ever thought of screen advertisement?
2. Is there any study made so far for the assessment of potentials for cinema screen advertisement?
3. What limiting factors are there to hinder the promotional enterprises to develop ads for screen advertisements?
 - There has been no such a request from customers
 - There has been no request from cinema houses
 - It is not known in Ethiopia
 - It is not profitable to develop as that one for EVT advertisements
 - There has been no significant number of cinema attendants in Ethiopia
 - Financial limitations
 - Technological
 - Cultural influences
 - Little time to do so
 - Lack of technician
 - Lack of know how
 - Government regulation
 - Legal prohibition
 - Others, please mention
4. What do you think are the major potential threats to start developing cinema screen advertisements?
5. What do you think are the major potential opportunities to start developing cinema screen advertisements?
6. What are the major strengths of the promotional enterprise to start production of cinema screen advertisements?
7. What are the major weaknesses of the promotional enterprise to start production of cinema screen advertisements?
8. If you have planned to start production of cinema screen advertisement, when would you like to start?