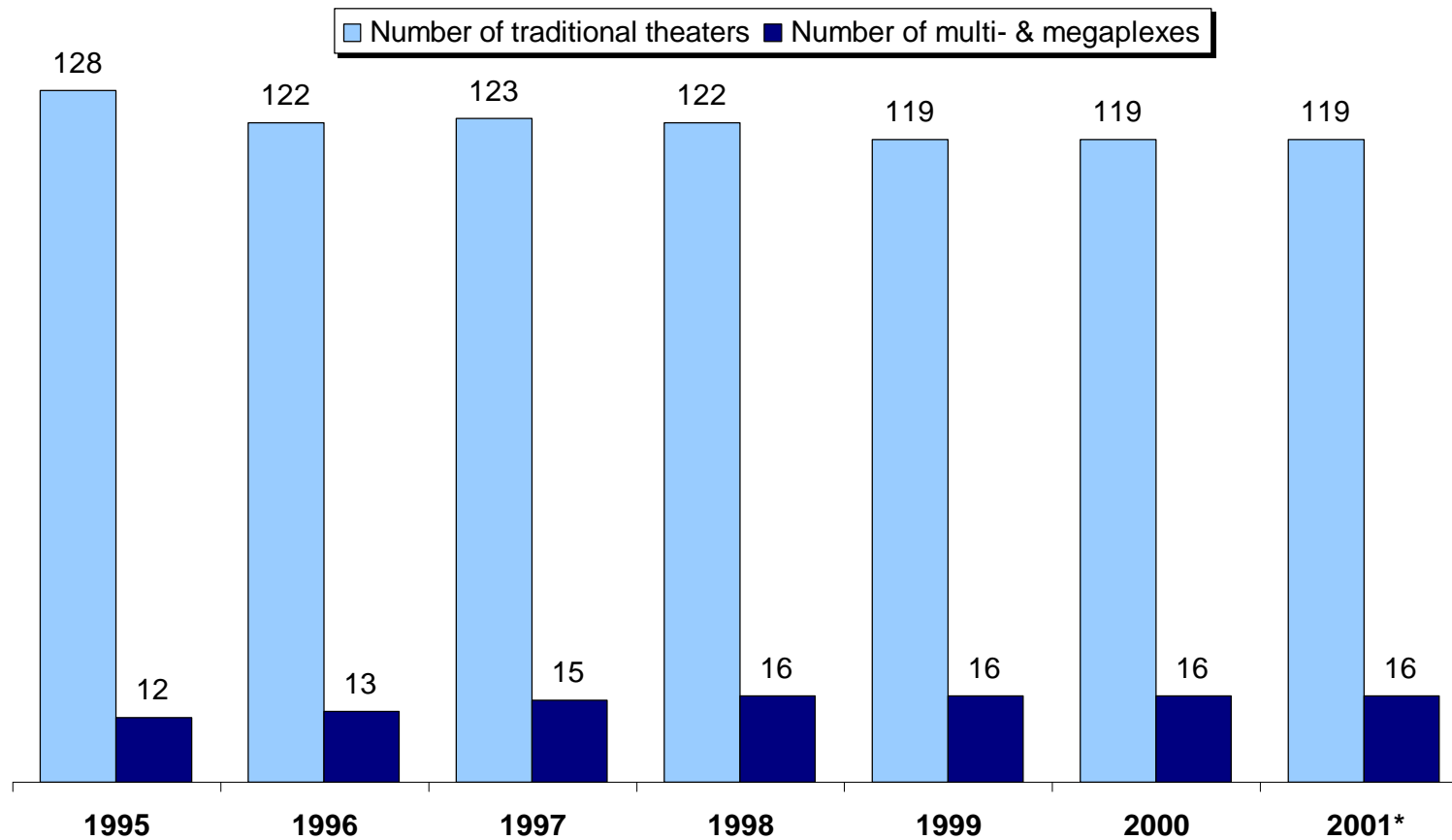

5. Cinema

December 2001

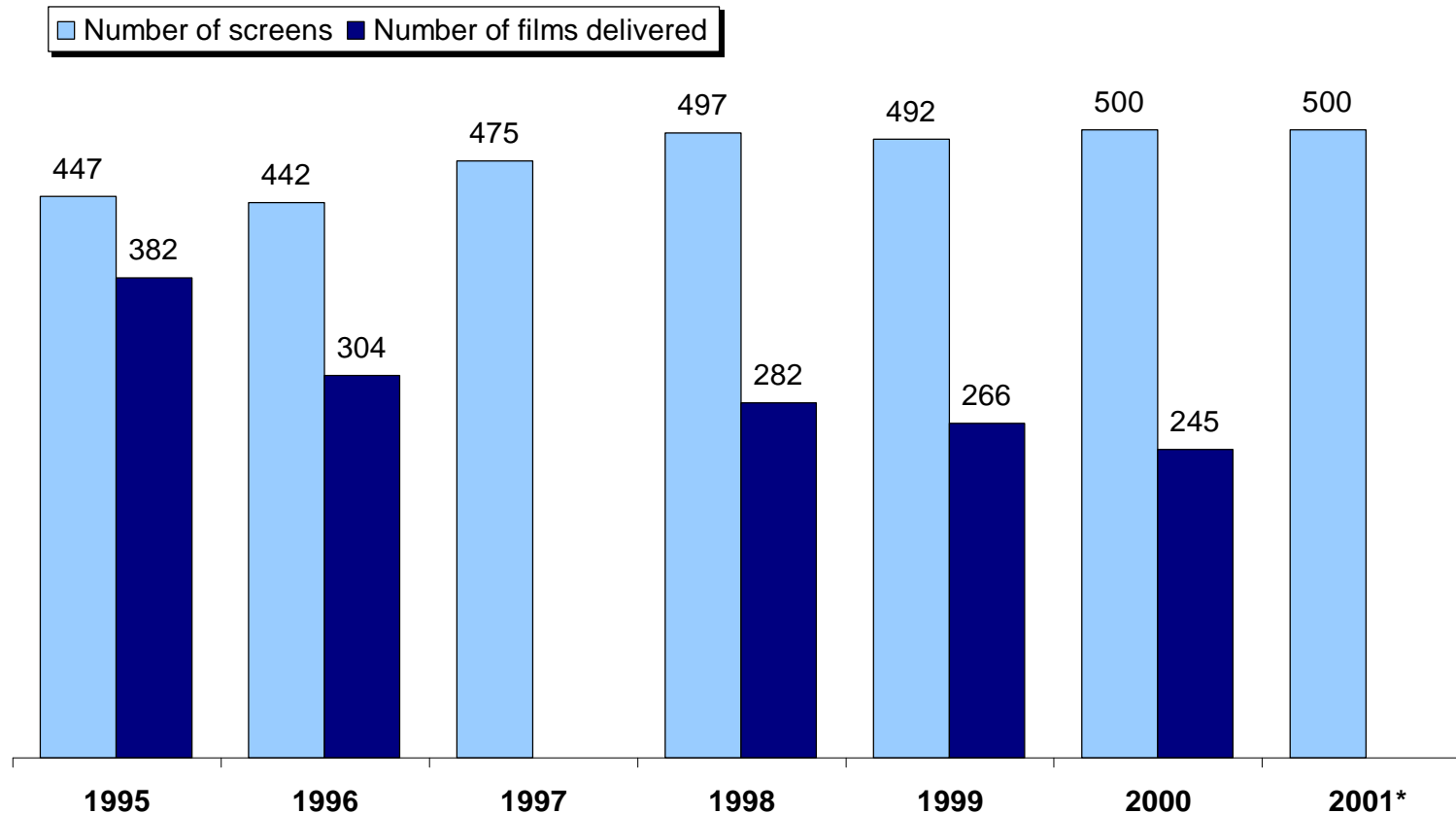
Cinema : Belgium

5.1. General indicators

About Cinema Structure



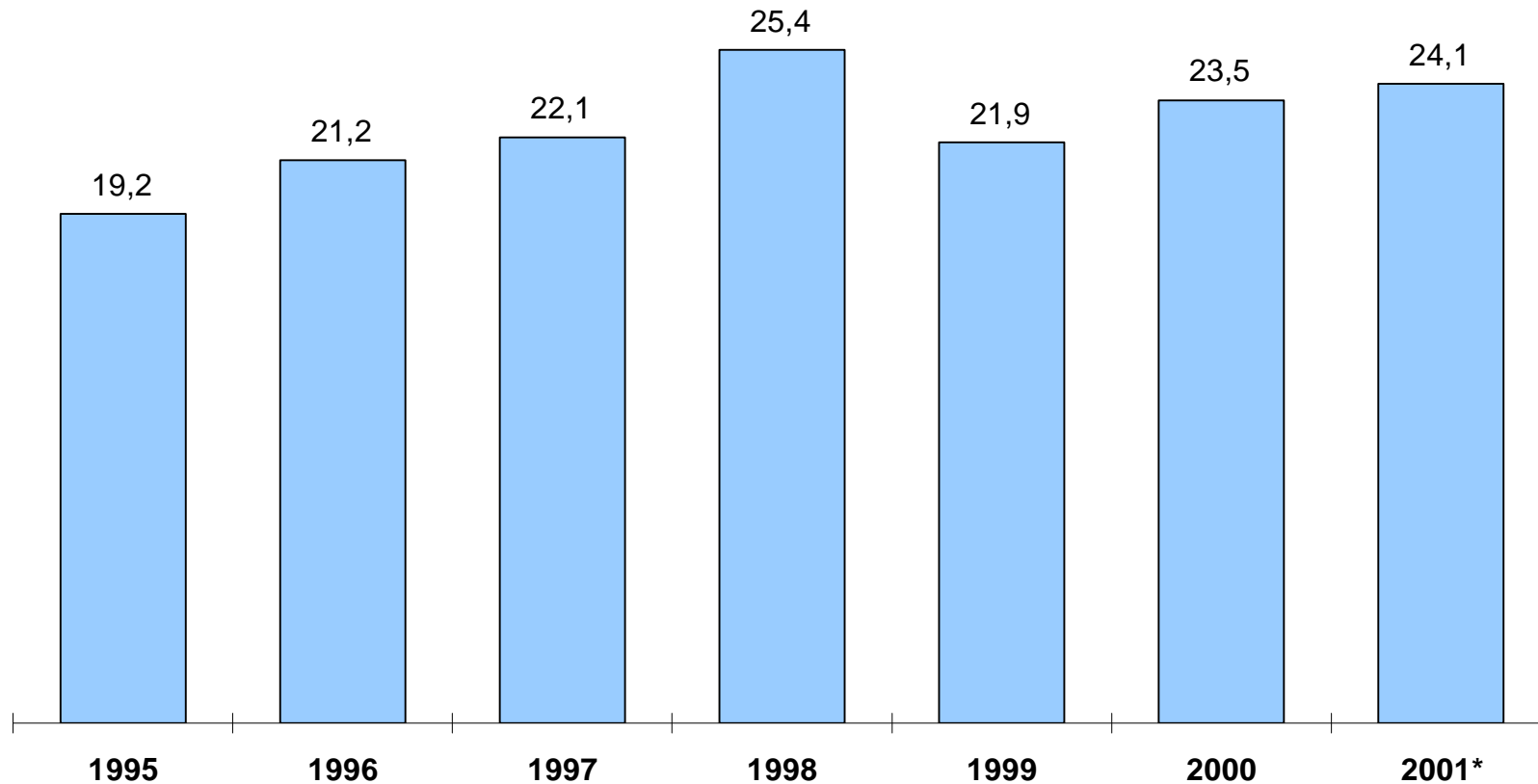
About Cinema Structure



5.2. Audiences

About Audiences

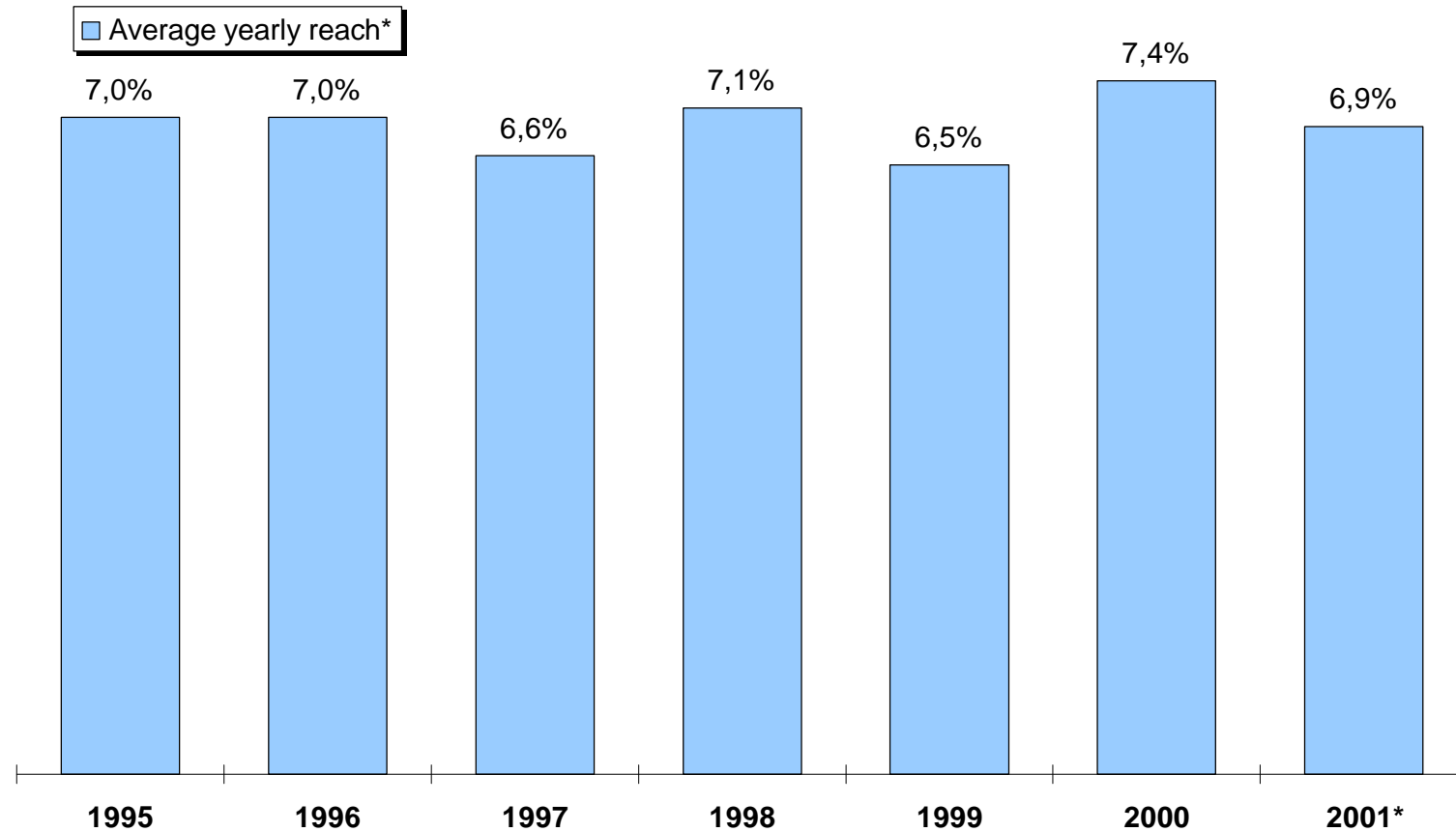
Number of tickets sold - annual basis



Belgium

In millions
of tickets sold 2000 & 2001 : estimates
Sources: INS
* 2001 : 1/1/01-30/6/01

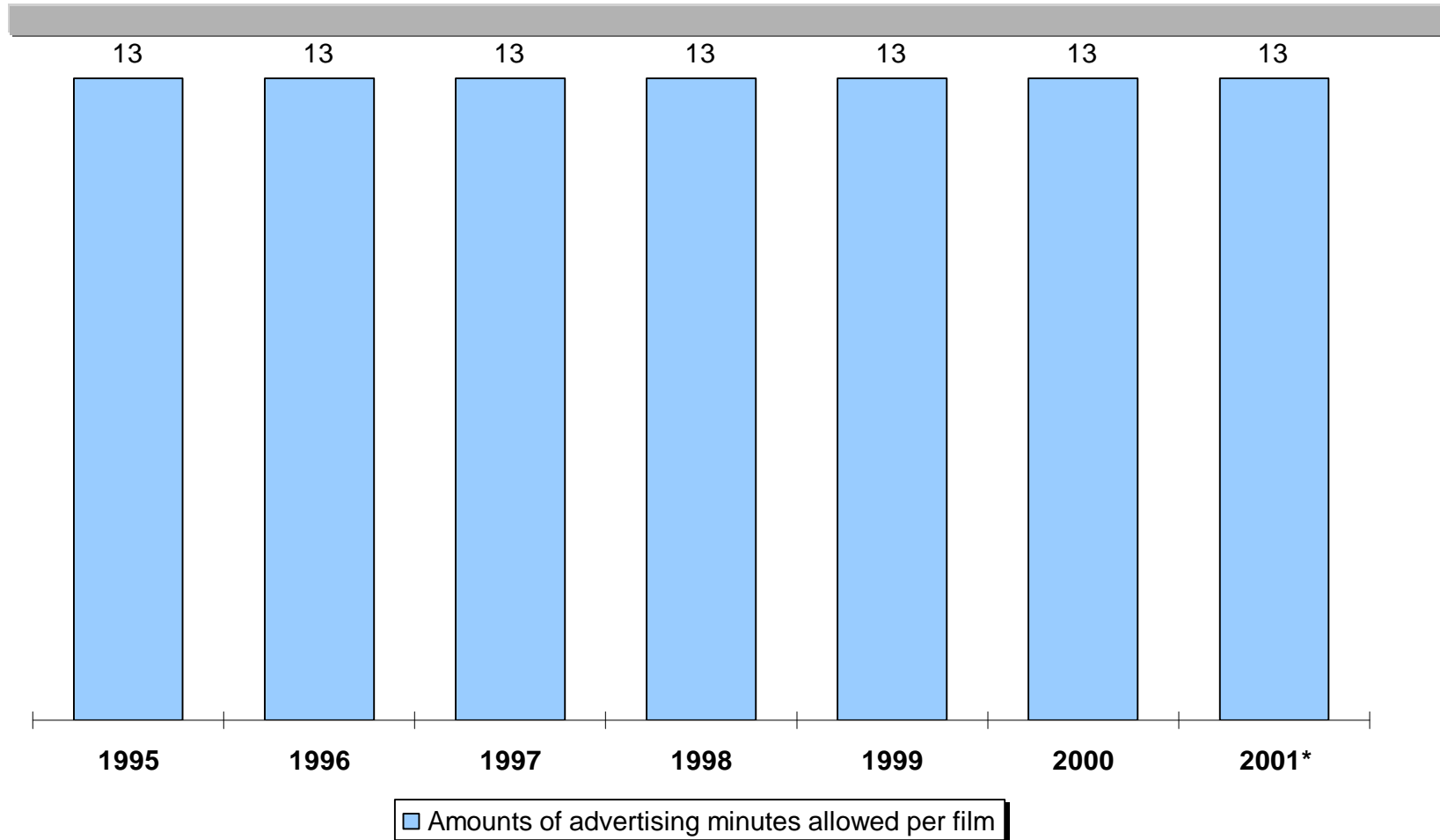
About Audiences



Belgium

* based on average week, total 15+
8.435.200 inhab.
Source: CIM
* 2001 : 1/1/01-30/6/01

About Audiences



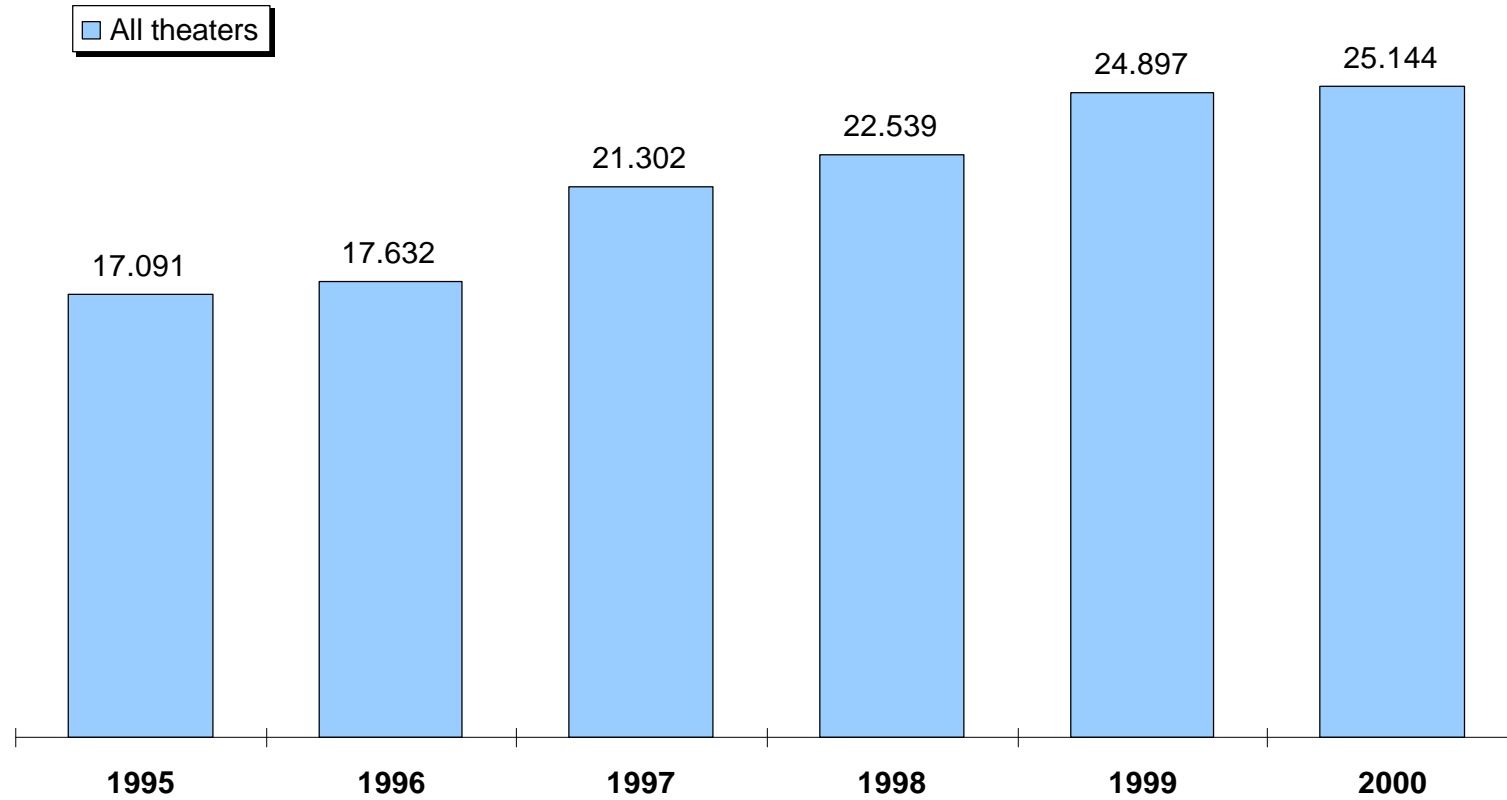
5.3. Commercial Offer in 2001*

Sales houses	Owner	Status
RMB	RMB	Part of an international group, RMBi

- Highly concentrated commercial offer : Monopoly

5.4. Media investments

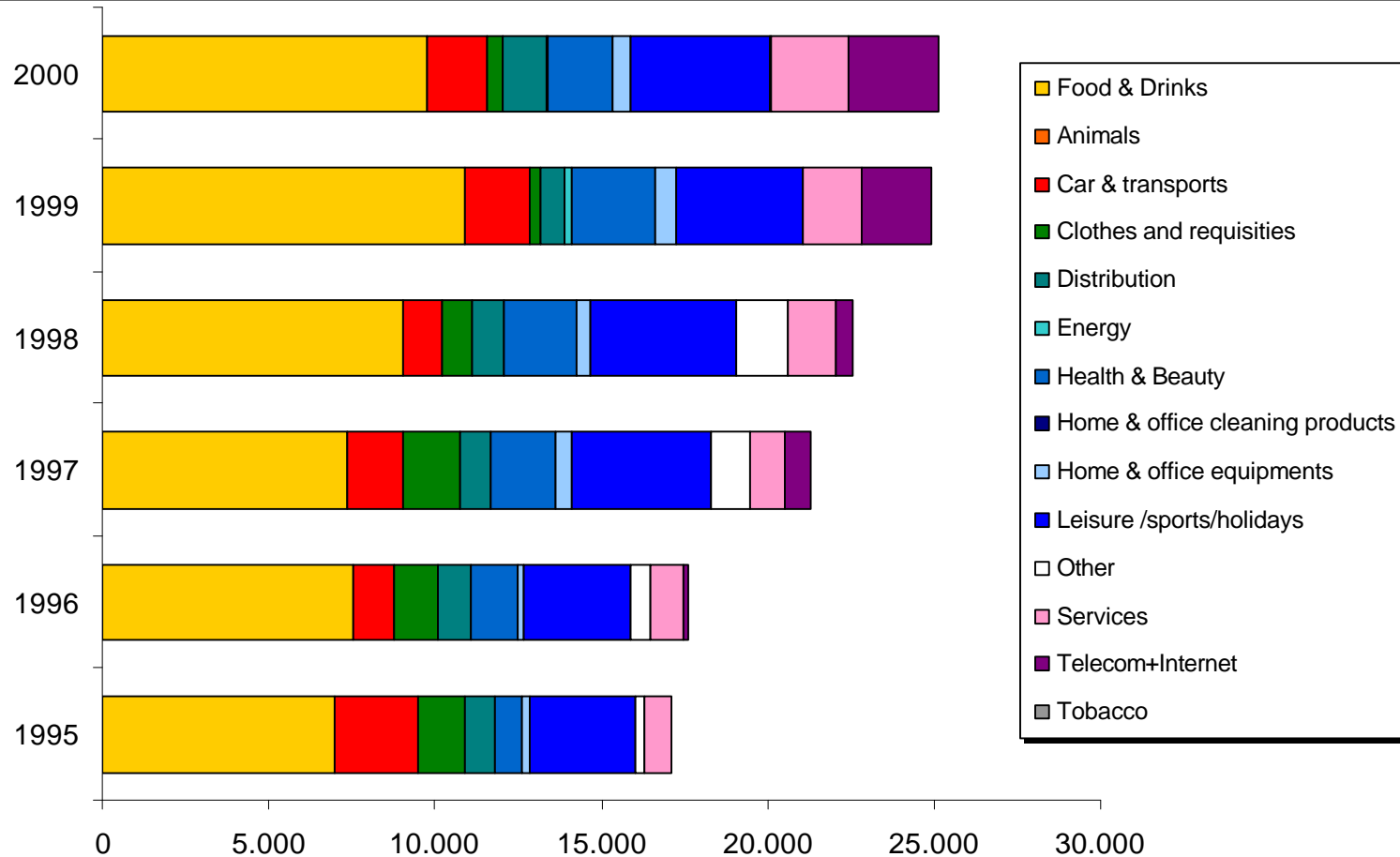
Media Investments



Media Investments

By Advertising Type	1995	1996	1997	1998	1999	2000
Commercial spots	17.091	17.632	21.302	22.539	24.897	25.144
Billboard Spots	Unexisting					
Sponsoring spots	Measured as commercial spots					
Self Promotion Spots	Not measured					
Live promotion/demo in the theater	Not measured					
Inserts or Product Placement spots	Unexisting					

Media Investments



Media Investments

Cinema investments split per sector

	1995	1996	1997	1998	1999	2000
Food & Drinks	6.967	7.537	7.366	9.024	10.871	9.772
Animals	0	0	0	0	0	0
Car & transports	2.510	1.220	1.670	1.170	1.979	1.803
Clothes and requisities	1.404	1.297	1.740	907	297	474
Distribution	909	1.019	905	975	751	1.302
Energy	0	0	0	12	237	29
Health & Beauty	823	1.407	1.926	2.141	2.468	1.962
Home & office cleaning products	0	0	0	0	0	0
Home & office equipments	225	186	521	449	661	527
Leisure /sports/holidays	3.174	3.237	4.157	4.379	3.780	4.204
Other	304	550	1.178	1.562	10	16
Services	774	1.043	1.037	1.419	1.758	2.316
Telecom+Internet	0	135	802	501	2.085	2.738
Tobacco	0	0	0	0	0	0

Media Investments

Cinema investments split per sector

	1995	1996	1997	1998	1999	2000
Food & Drinks	41%	43%	35%	40%	44%	39%
Animals	0%	0%	0%	0%	0%	0%
Car & transports	15%	7%	8%	5%	8%	7%
Clothes and requisities	8%	7%	8%	4%	1%	2%
Distribution	5%	6%	4%	4%	3%	5%
Energy	0%	0%	0%	0%	1%	0%
Health & Beauty	5%	8%	9%	9%	10%	8%
Home & office cleaning products	0%	0%	0%	0%	0%	0%
Home & office equipments	1%	1%	2%	2%	3%	2%
Leisure /sports/holidays	19%	18%	20%	19%	15%	17%
Other	2%	3%	6%	7%	0%	0%
Services	5%	6%	5%	6%	7%	9%
Telecom+Internet	0%	1%	4%	2%	8%	11%
Tobacco	0%	0%	0%	0%	0%	0%

Notes about Cinema

Note about Cinema Structure

- Definitions used by the General Assembly of the “Union Internationales des Cinémas”
 - Traditional theater : up to 8 screens per theater
 - Multiplex : 8 screens or more per theater
 - Megaplex : 16 screens or more per theater
- Predominance of traditional theaters in Belgium, concentrated in networks
- Downward trend for films delivered
 - Offer in theaters in decline due to concentration of the film business
 - Dominance of American movies and American film distributors with high negotiation power
 - Concentration of theaters in networks
 - ⇒ Uniform programming (blockbusters shown on several screens in same theater)
 - ⇒ Cost-efficient distribution: fewer releases but more copies per release
 - ⇒ Difficult access to the screens for independent movies

Note about Cinema Audiences

- Number of tickets sold highly depends on major releases available (see positive impact of Titanic in 1998).
- Cinema has limited reach potential on total population compared to other media.
- The amount of advertising minutes is strictly limited in Belgium in order to guarantee a qualitative medium.

Note about Cinema Media Investments

- Growing media investments
 - Only commercial spots are measured.
 - Self promotion spots as well as spots on the film format (THX, Dolby...) are on free basis.
 - Main investment sectors: targeting young, urban, up-scale consumers
 - traditionally Food & Drinks, Leisure/Sports/Holidays, Health & Beauty
 - newcomer Telecom/Internet
 - No film breaks are allowed for advertising.
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