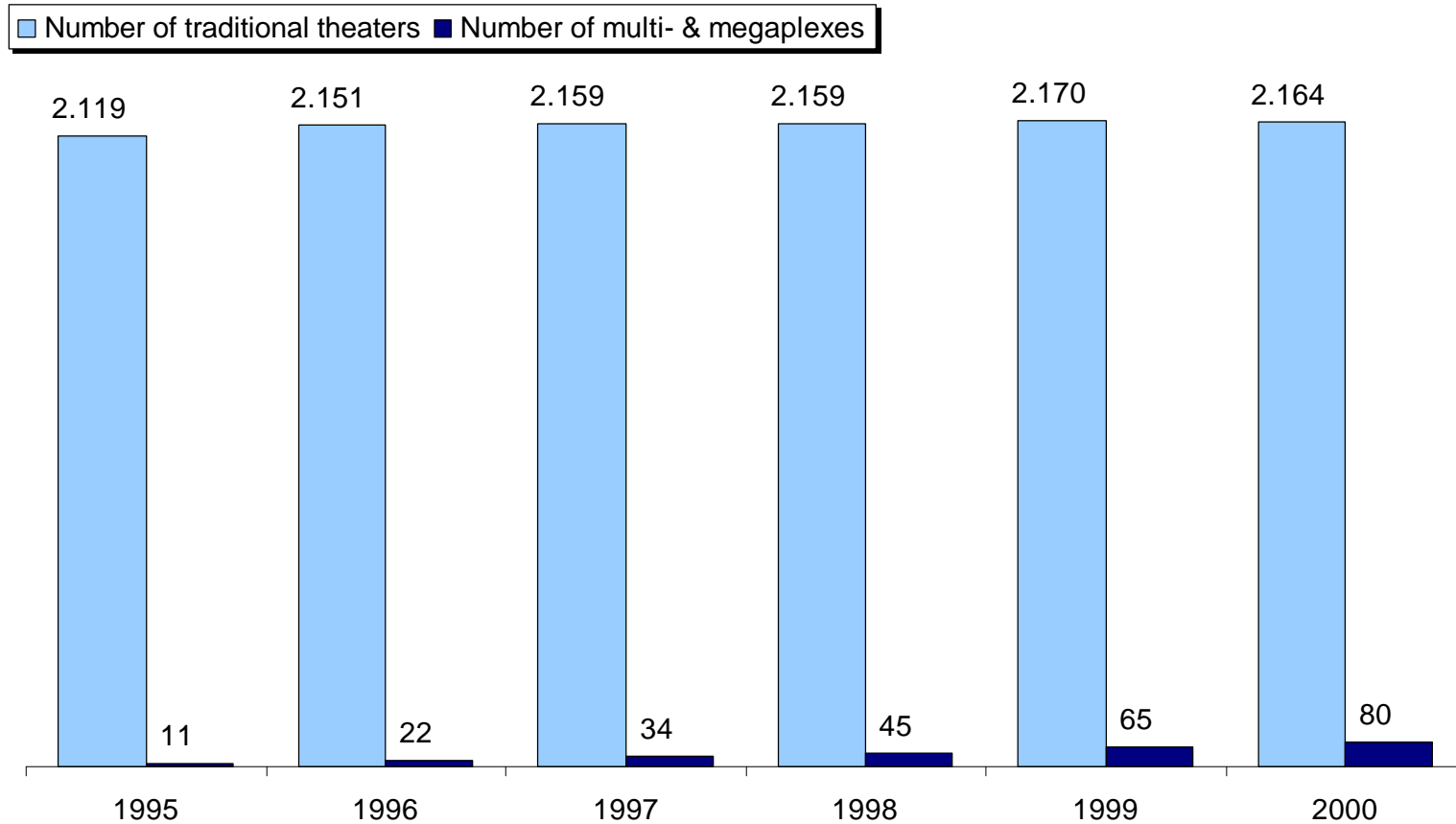
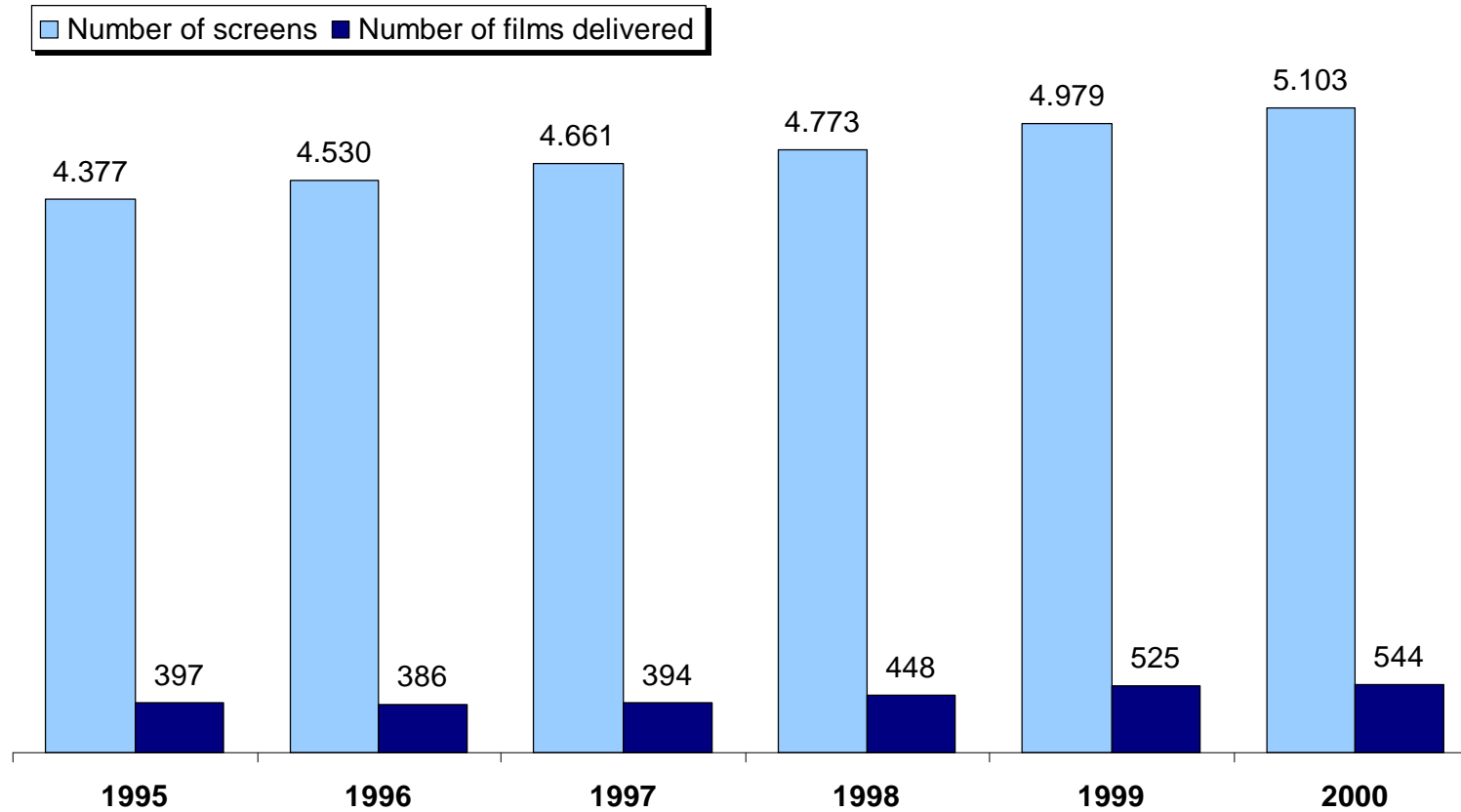

Cinema : France

5.1. General indicators

About Cinema Structure

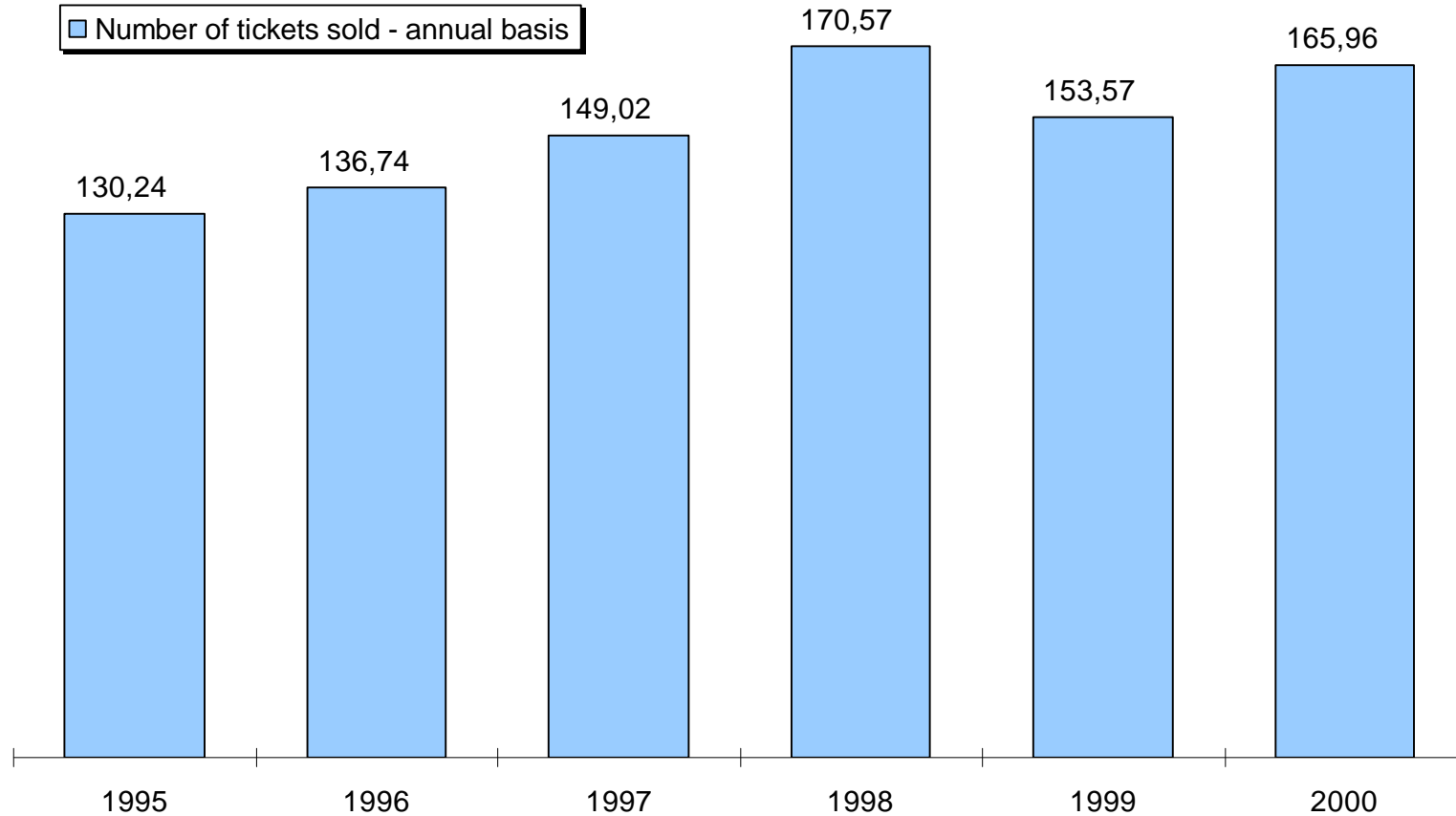


About Cinema Structure

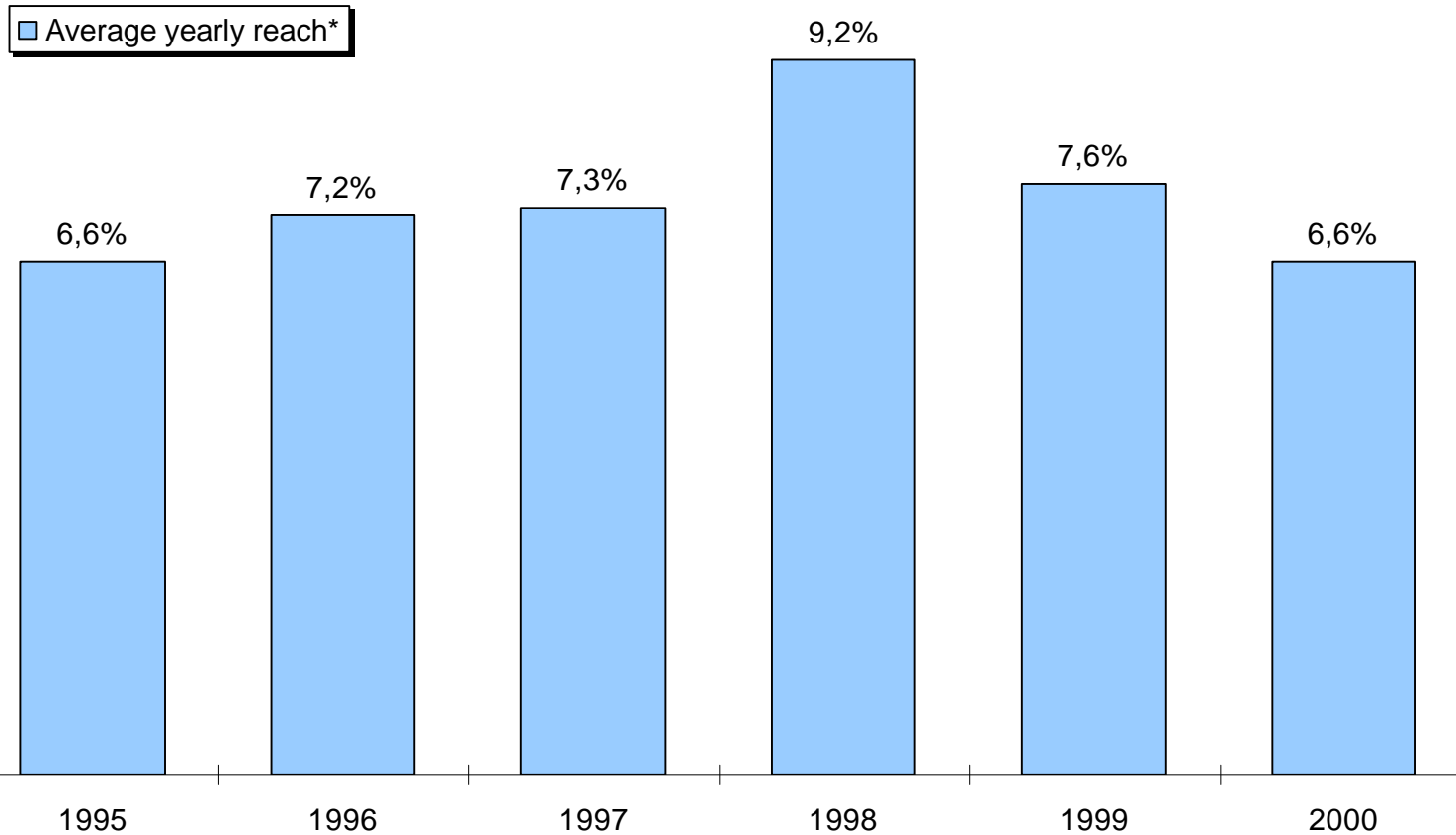


5.2. Audiences

About Audiences



About Audiences



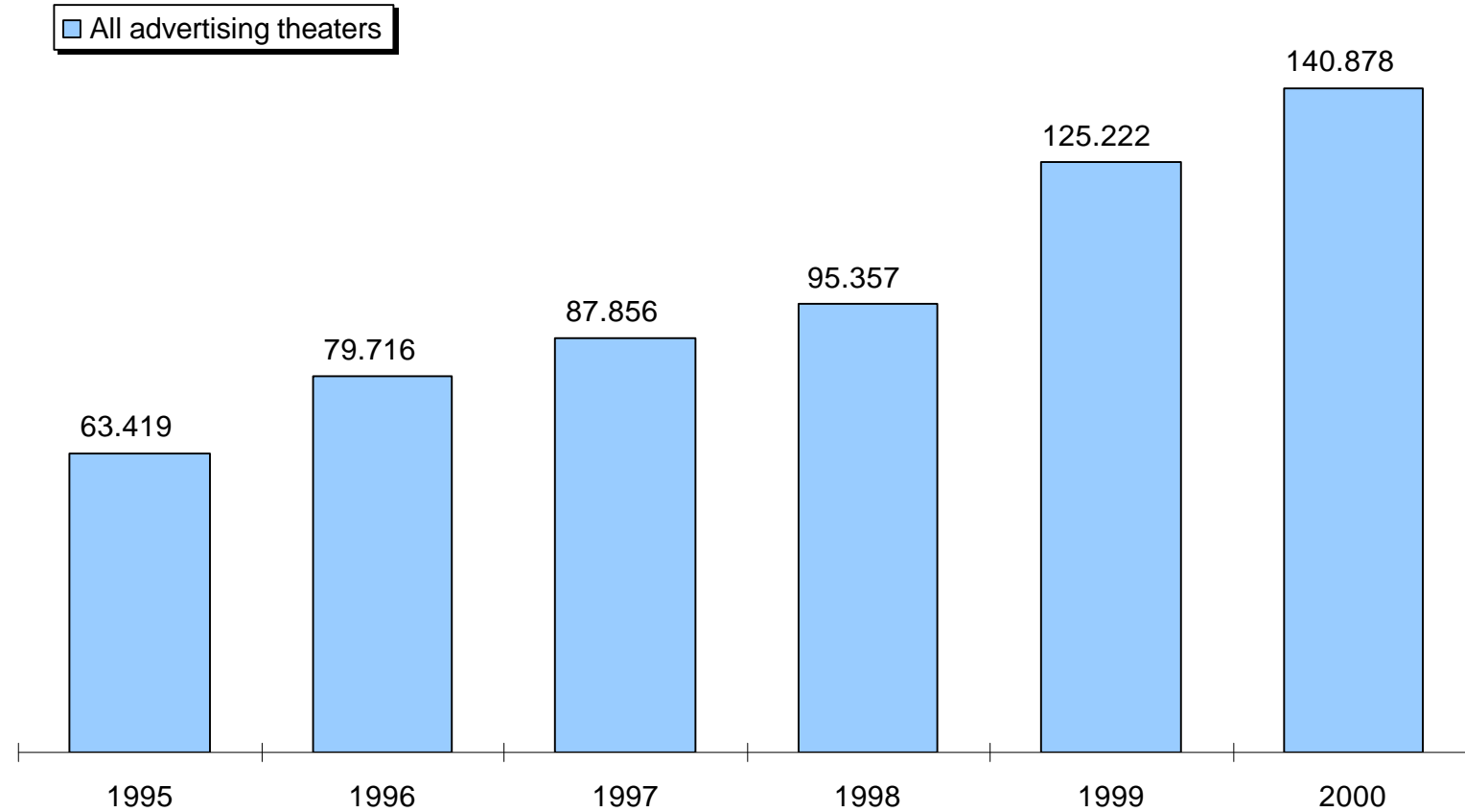
5.3. Commercial Offer in 2001*

Sales houses	Owner	Status
Médivision	Publicis, Famille Jean Mineur	Part of an International Group
Circuit A	UGC	Part of an International Group

- Highly concentrated commercial offer : Duo-poly

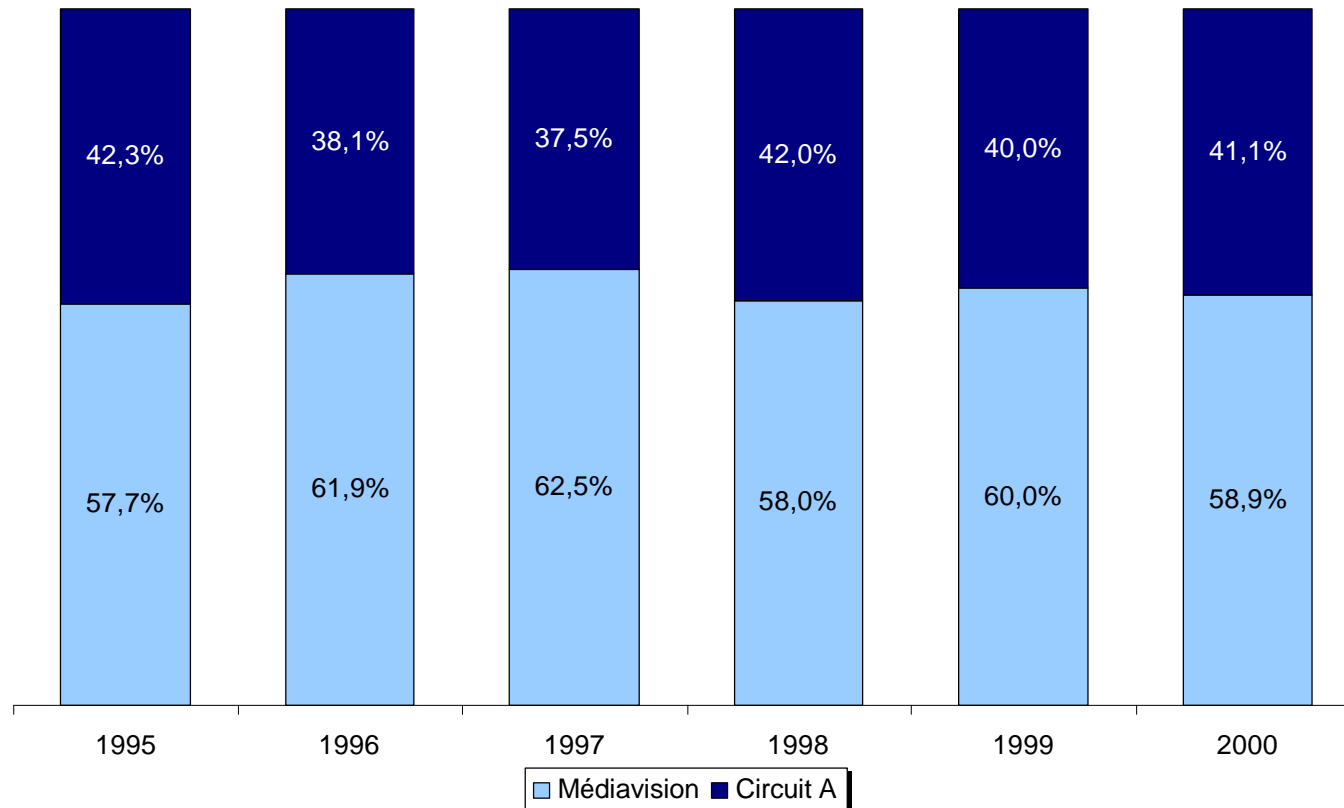
5.4. Media investments

Media Investments



Media Investments

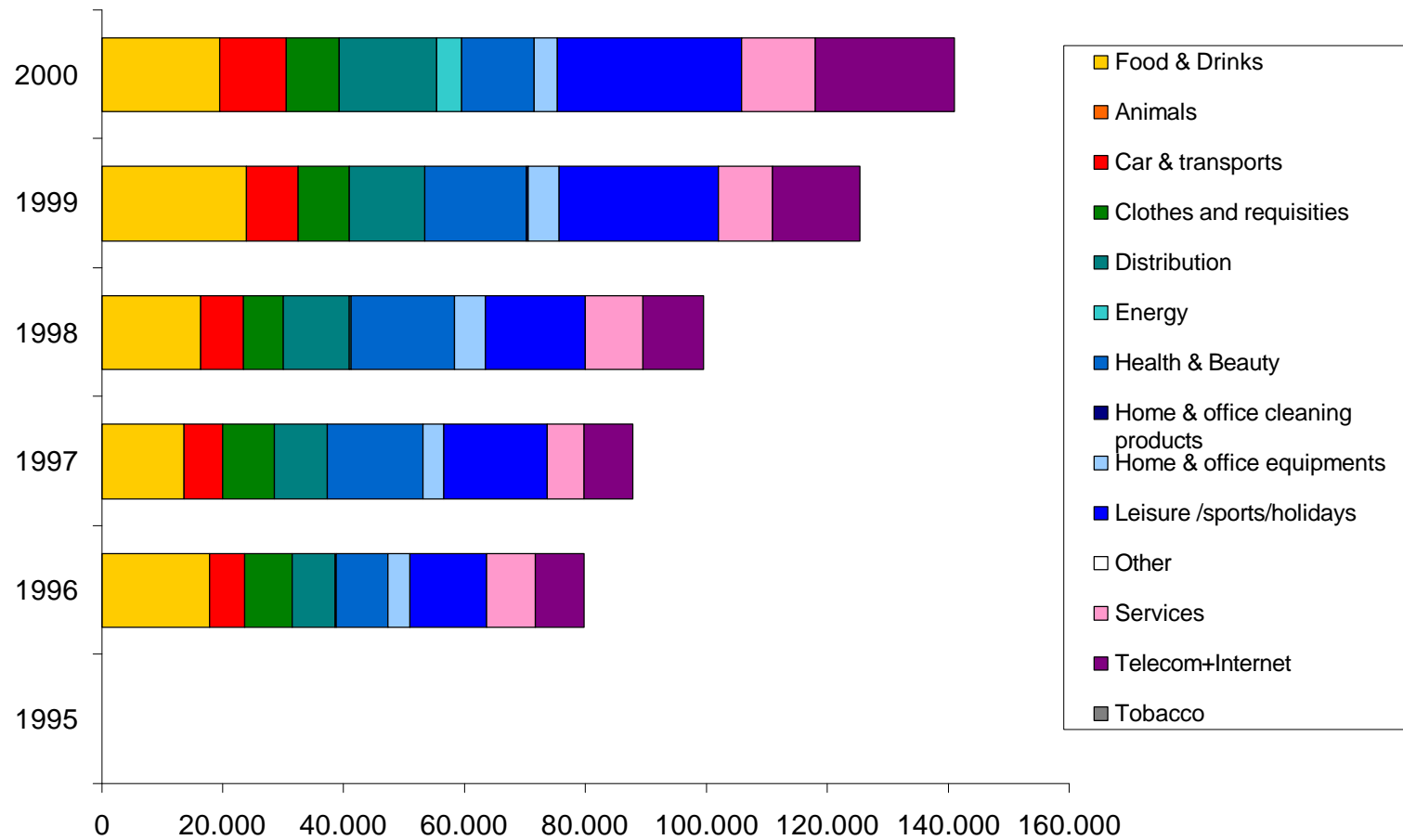
Advertising market share of the 2 national sales houses



Media Investments

By Advertising Type	1995	1996	1997	1998	1999	2000
Commercial spots	63.419	79.716	87.856	95.357	125.222	140.878
Billboard Spots	Unexisting					
Sponsoring spots	Unexisting					
Self Promotion Spots	Not measured					
Live promotion/demo in the theater	Not measured					
Inserts or Product Placement spots	Not measured					
Habillage d'écran (sponsoring)	Not measured					

Media Investments



Media Investments

Cinema investments split per sector

	1996	1997	1998	1999	2000
Food & Drinks	17.692	13.676	16.436	24.024	19.546
Animals	0	0	0	0	0
Car & transports	6.058	6.334	6.866	8.518	11.060
Clothes and requisities	7.597	8.639	6.751	8.476	8.741
Distribution	7.195	8.574	11.027	12.324	15.907
Energy	325	0	207	0	4.160
Health & Beauty	8.467	15.879	17.012	16.934	12.075
Home & office cleaning products	0	0	25	107	0
Home & office equipments	3.542	3.438	5.080	5.328	3.914
Leisure /sports/holidays	12.722	16.997	16.700	26.244	30.365
Other	65	0	15	0	0
Services	8.022	6.199	9.508	8.966	12.224
Telecom+Internet	8.032	8.119	9.878	14.410	22.878
Tobacco	0	0	0	0	0

Media Investments

Cinema investments split per sector

	1996	1997	1998	1999	2000
Food & Drinks	22%	16%	17%	19%	14%
Animals	0%	0%	0%	0%	0%
Car & transports	8%	7%	7%	7%	8%
Clothes and requisities	10%	10%	7%	7%	6%
Distribution	9%	10%	11%	10%	11%
Energy	0%	0%	0%	0%	3%
Health & Beauty	11%	18%	17%	14%	9%
Home & office cleaning products	0%	0%	0%	0%	0%
Home & office equipments	4%	4%	5%	4%	3%
Leisure /sports/holidays	16%	19%	17%	21%	22%
Other	0%	0%	0%	0%	0%
Services	10%	7%	10%	7%	9%
Telecom+Internet	10%	9%	10%	11%	16%
Tobacco	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 France, handled by independent exhibitors.
- The French market looks successful in protecting its local film business.
- 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

Note about Cinema Audiences

- In France (as in the UK), the number of minutes is negotiated by the sales house with each theater exhibitor. Though this customised situation results in self-regulation, it is very similar to the number of minutes in Belgium.
- 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.