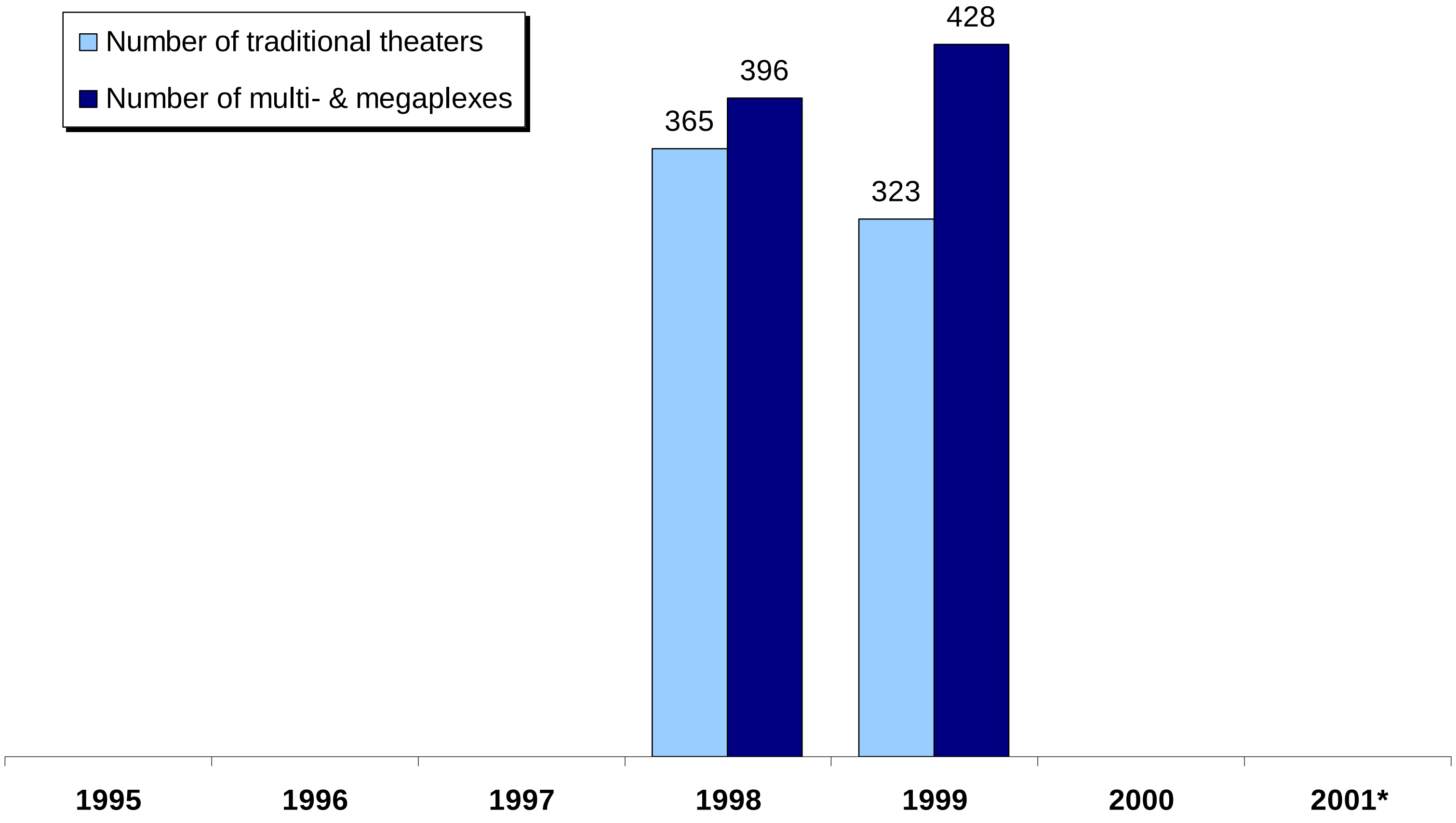
Cinema : United Kingdom

5.1. General indicators

CARAT CRYSTAL

About Cinema Structure

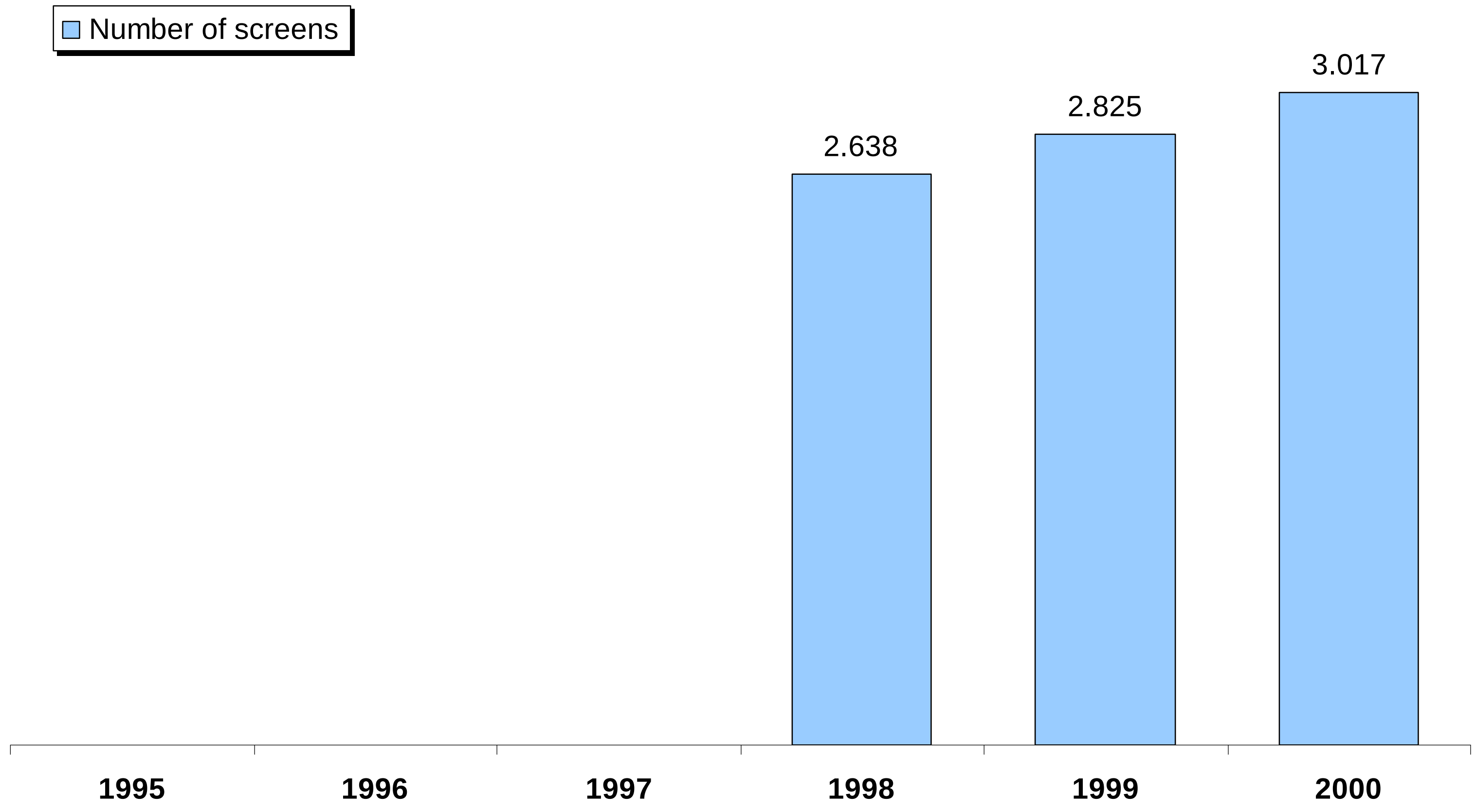


CARAT CRYSTAL

U.K.

Figures available only for 1998 & 1999
Sources: CAA
** 2001 : 1/1/01-30/6/01*

About Cinema Structure

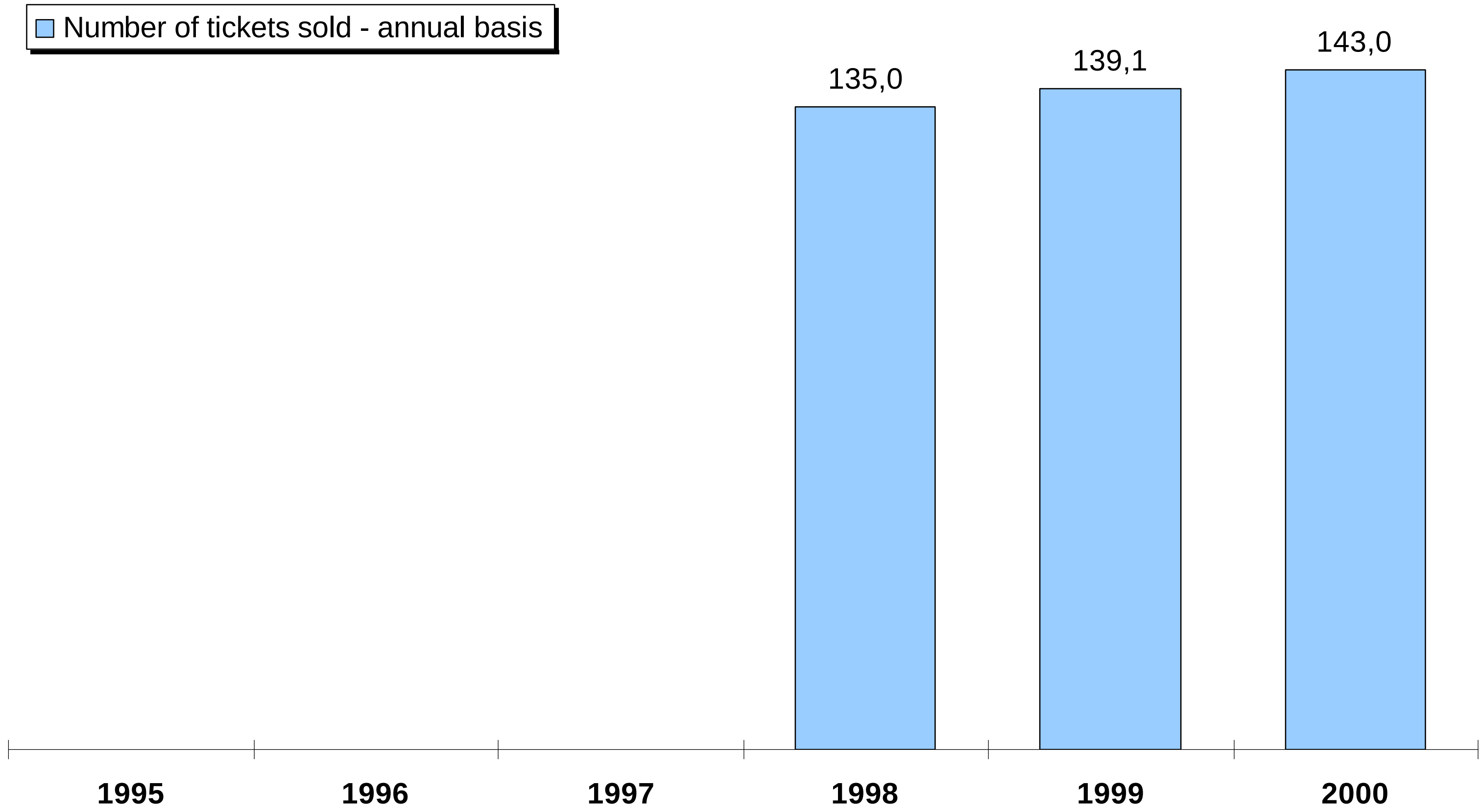


U.K.

# of screens available only for 1998, 1999, 2000
# of films delivered not available
Sources: CAA
** 2001 : 1/1/01-30/6/01*

5.2. Audiences

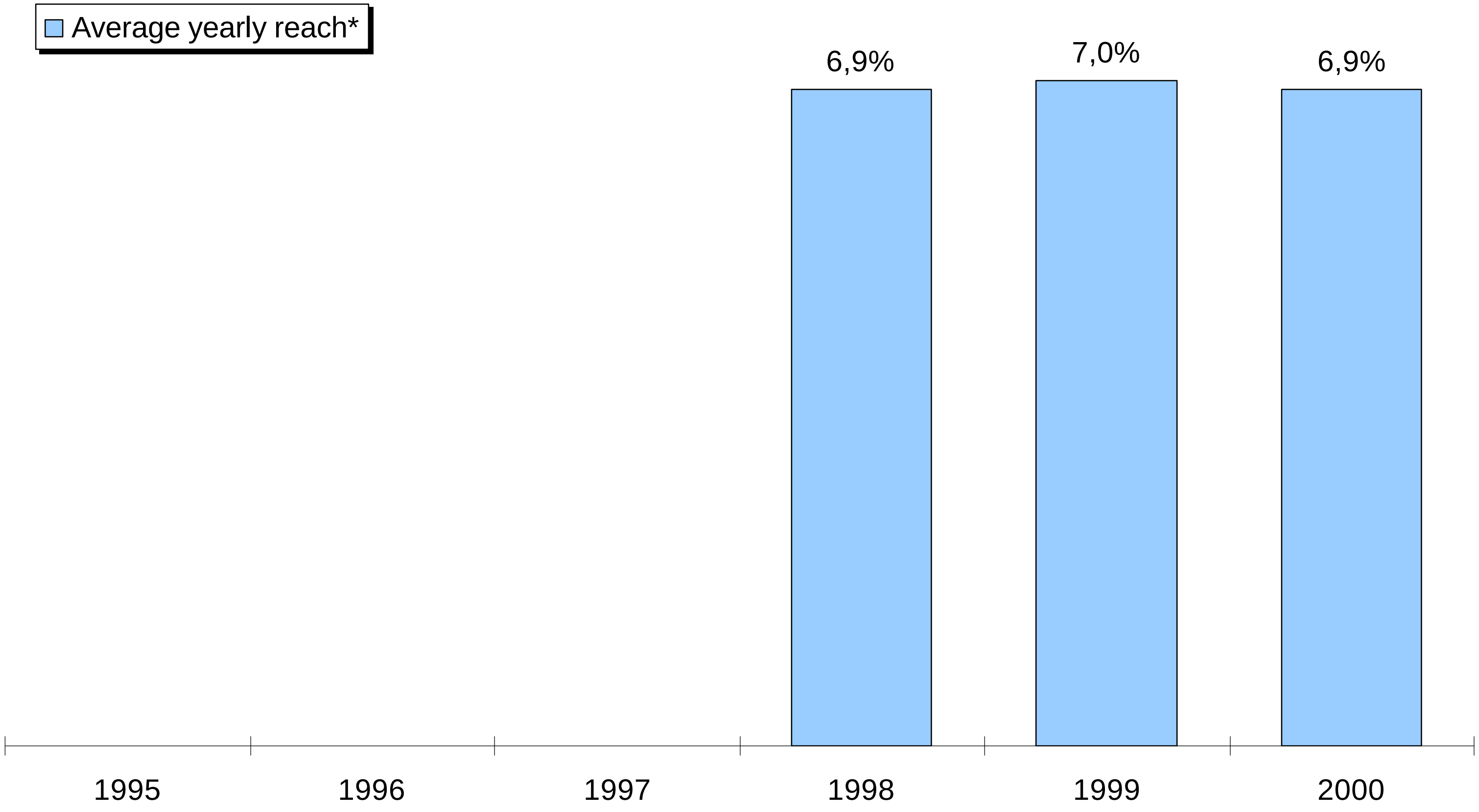
About Audiences



U.K.

In millions
Figures available only for 1998, 1999 & 2000
Sources: CAA

About Audiences



U.K.

Figures available only for 1998, 1999 & 2000
** based on average week, total 15+*
Sources: CAA

5.3. Commercial Offer in 2001*

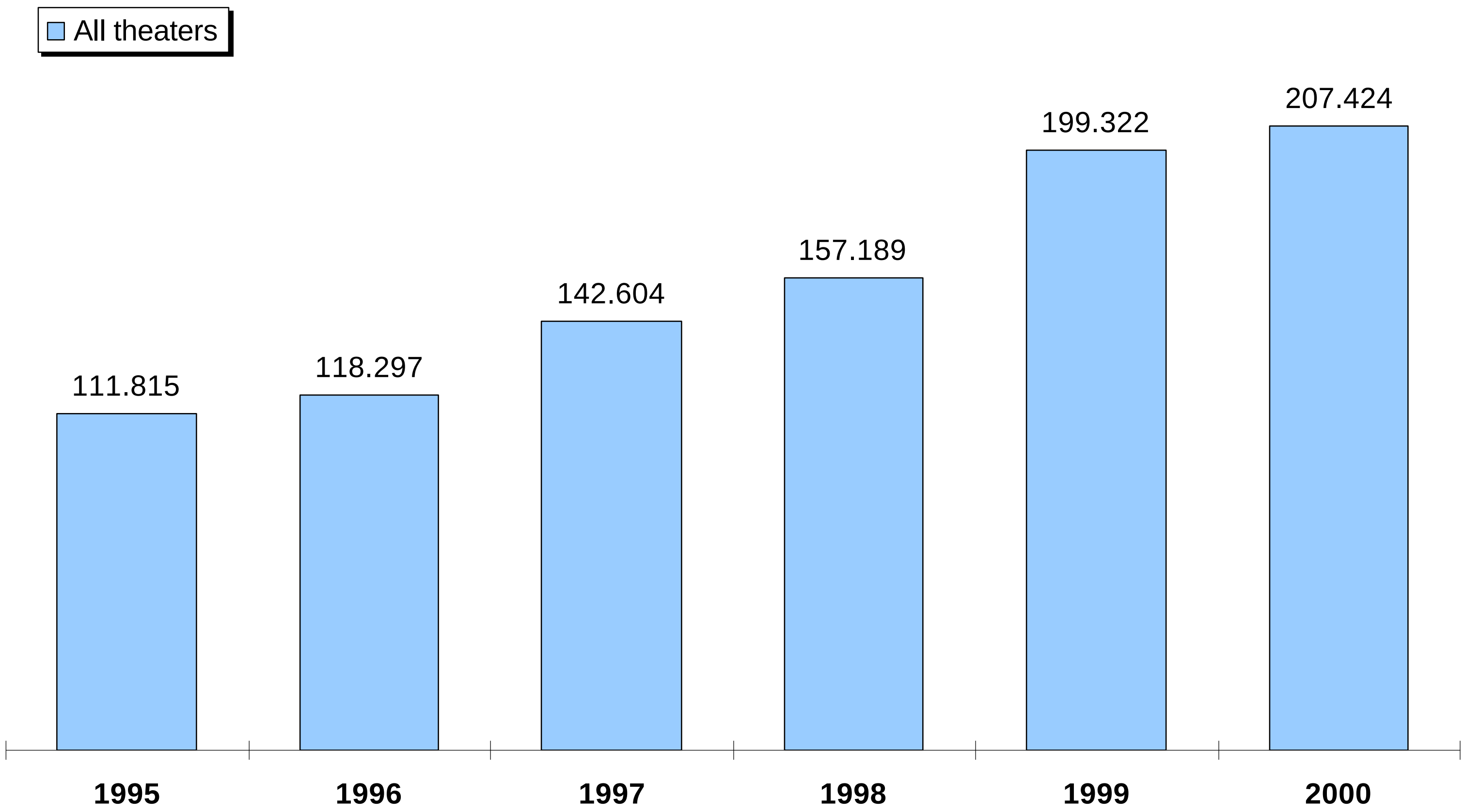
Sales houses	Owner	Status
Pearl & Dean	Scottish Media Group	Part of an International Group
Carlton Screen Advertising	Carlton	Local Network / Group

- Highly concentrated commercial offer : Duo-poly

** 2001 : 1/1/01-30/6/01*

5.4. Media investments

Media Investments



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U.K.

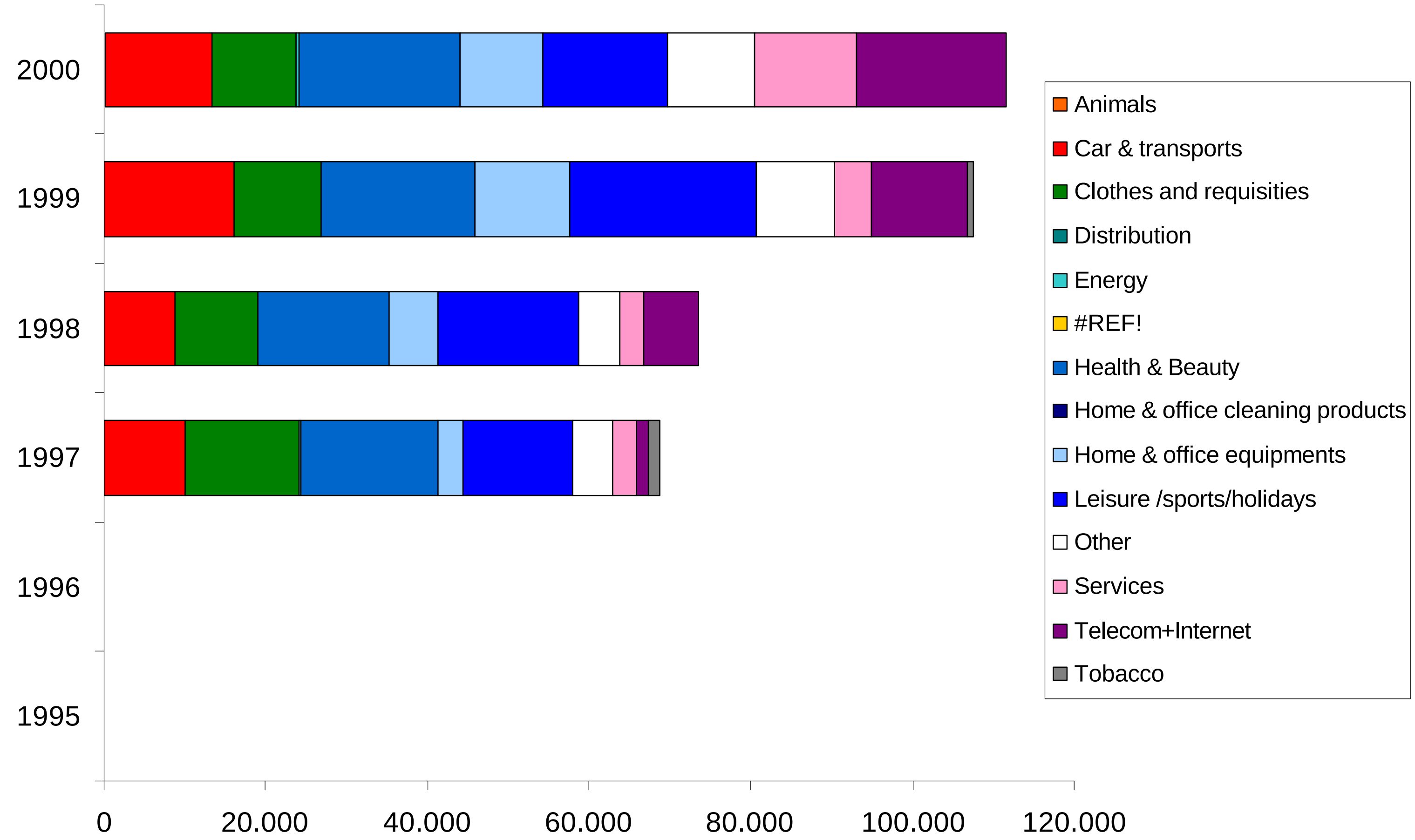
In Space Value - 1000 euros
100% commercial spots
Sources: Advertising Association

Media Investments

By Advertising Type	1995	1996	1997	1998	1999	2000
Commercial spots	111.815	118.297	142.604	157.189	199.322	207.424
Billboard Spots	Not measured					
Sponsoring spots	Not measured					
Self Promotion Spots	Not measured					
Live promotion/demo in the theater	Not measured					
Inserts or Product Placement spots	Not measured					

In Space Value - 1000 euros
100% commercial spots
Sources: Advertising Association

Media Investments



CARAT CRYSTAL

U.K.

In Space Value - 1000 euros
1995 & 1996 figures not available
Sources: ACNielsen MMS

Media Investments

Cinema investments split per sector

	1997	1998	1999	2000
Food & Drinks	33.542	44.729	41.256	38.377
Animals	0	0	0	154
Car & transports	10.108	8.815	16.101	13.162
Clothes and requisities	14.122	10.150	10.699	10.501
Distribution	0	0	0	0
Energy	104	19	0	328
Health & Beauty	16.930	16.251	19.058	19.951
Home & office cleaning products	26	33	0	0
Home & office equipments	3.216	6.098	11.726	10.173
Leisure /sports/holidays	13.462	17.421	23.011	15.506
Other	4.956	5.118	9.848	10.729
Services	2.990	2.951	4.410	12.650
Telecom+Internet	1.312	6.591	11.885	18.422
Tobacco	1.623	0	767	0

CARAT CRYSTAL

U.K.

1995 & 1996 figures not available
Sources: ACNielsen MMS

Media Investments

Cinema investments split per sector

	1997	1998	1999	2000
Food & Drinks	33%	38%	28%	26%
Animals	0%	0%	0%	0%
Car & transports	10%	7%	11%	9%
Clothes and requisities	14%	9%	7%	7%
Distribution	0%	0%	0%	0%
Energy	0%	0%	0%	0%
Health & Beauty	17%	14%	13%	13%
Home & office cleaning products	0%	0%	0%	0%
Home & office equipments	3%	5%	8%	7%
Leisure /sports/holidays	13%	15%	15%	10%
Other	5%	4%	7%	7%
Services	3%	2%	3%	8%
Telecom+Internet	1%	6%	8%	12%
Tobacco	2%	0%	1%	0%

CARAT CRYSTAL

U.K.

1995 & 1996 figures not available
Sources: ACNielsen MMS

Note 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
- High number of multi- & megaplexes in the UK
- Downward trend for films delivered in the UK
  - 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.

- In the UK, the number of ad 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.

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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