Kinepolis Group

Enriching people’s lives

through the power of movies.

Kinepolis at a glance

Kinepolis
at a glance

Since
1968

110
Complexes
In 9 countries

1,141
Screens

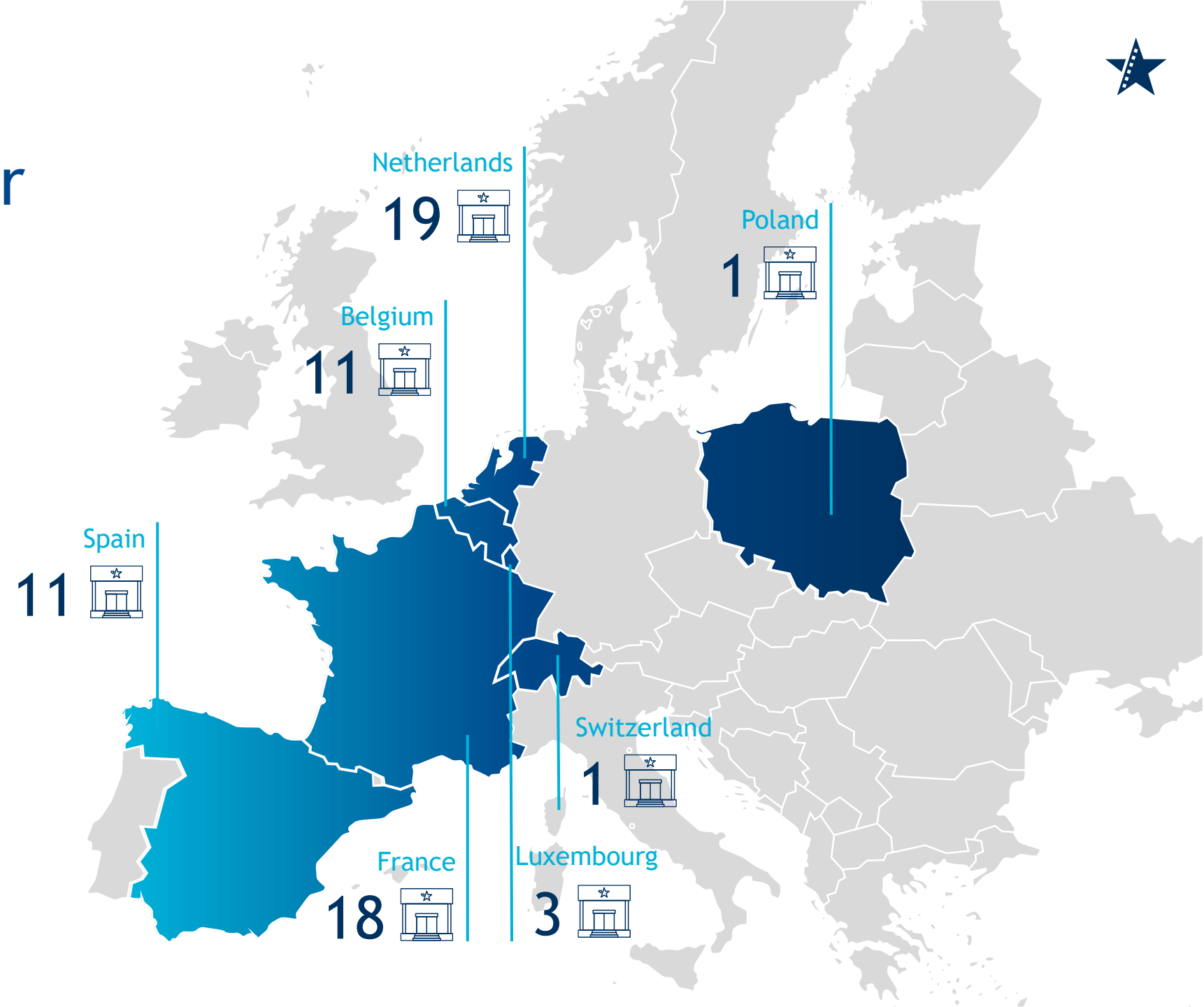
200,000
Seats

3
Brands

35 MIO
Visitors in 2023

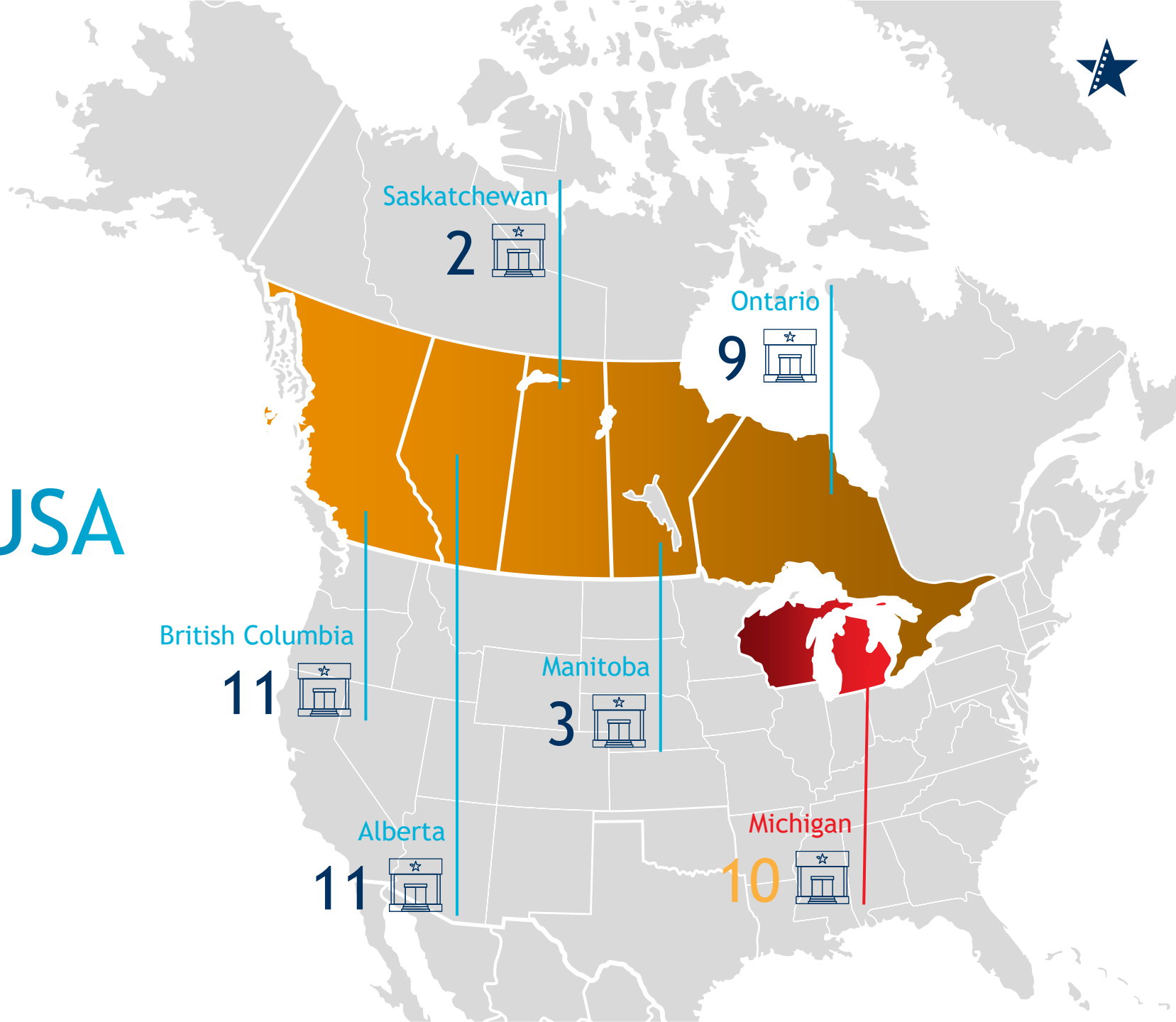
605 MIO
Turnover in 2023

Cinema operator active in Europe



Cinema operator active in

Canada and USA



Kinepolis Brétigny-sur-Orge (FR)

Landmark Waterloo, Ontario

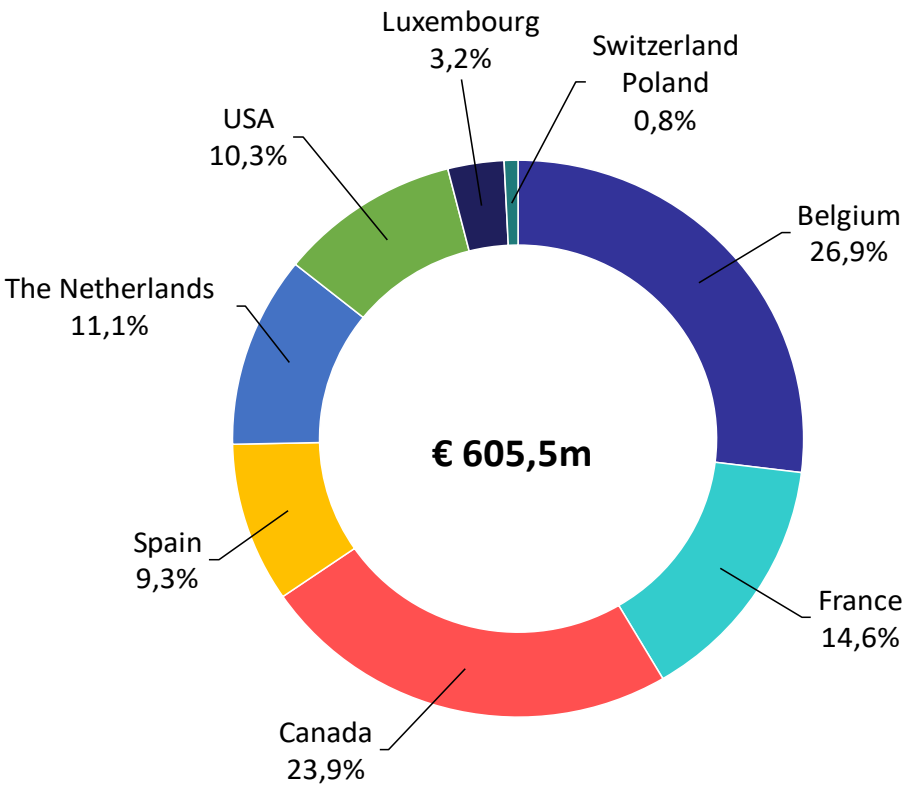
Kinepolis

Core activities

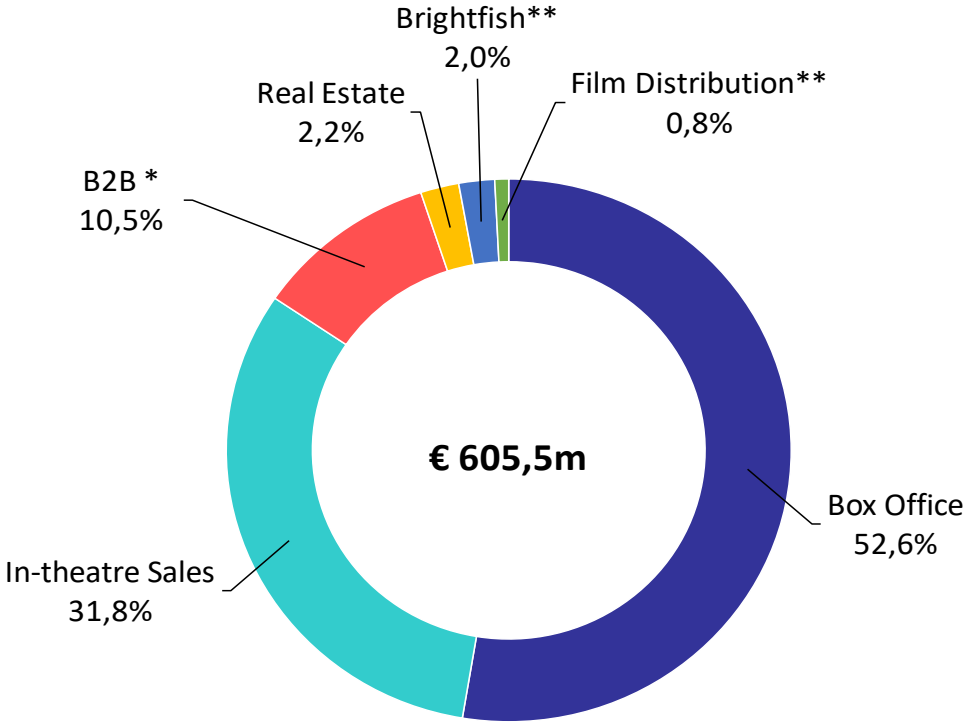
- Box Office
- In-theatre sales
- Real estate
- Business-to-Business
- Film distribution
- Brightfish – Screen advertising

Revenue

By country & activity



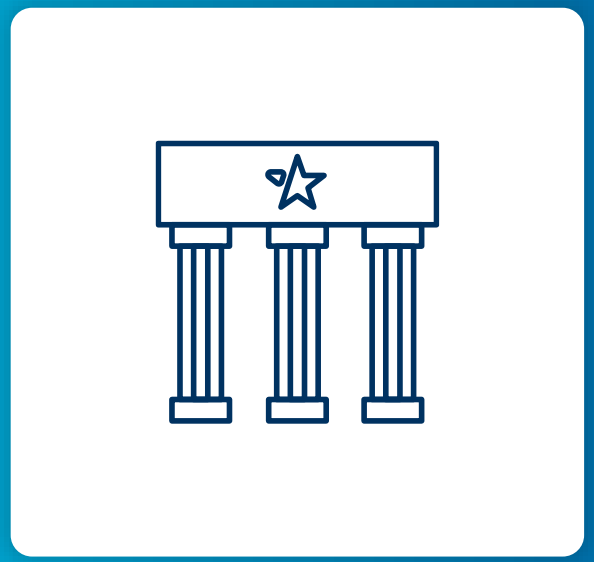
YE 2023



YE 2023

The Kinepolis strategy

3 pillar strategy



1 Best cinema operator

2 Best marketer

3 Best real estate manager

core strategy

3 pillar strategy

Best cinema operator

1

Self-learning organisation based on Business ownership

Customer Satisfaction (CSI)

Employee Satisfaction (PSI)

Financial KPIs

ESG KPIs

XENIA
KINEPOLIS

Best marketer

2

Continuously investing in the relationship with our visitors to provide an offer that meets their wishes and needs.

- Active programming
- Digital marketing
- Experience

Nintendo + ILLUMINATION
THE SUPER
MARIO
BROS.
MOVIE

LASER
ULTRA
by
KINEPOLIS®
14
LASER
ULTRA
by
KINEPOLIS®

Best real estate manager

3

"Committed to continuing the optimal management, use and management of our unique real estate portfolio.

KINEPOLIS
BOWLING
Brasserie

Successful execution of expansion strategy since 2014

Based on

Improvement potential

Derived from core strategy

Integration of

Kinepolis' way

of working and management structure

From 23 to 110

Cinemas to date
(Europe and North-America)

Timeline 2014-2023

Covid-19

2014
Takeover of **two Spanish cinemas** (Madrid & Alicante)

2014
Takeover Wolff Bioscopen cinema group
Entrance Dutch market

2015
Takeover Utopolis cinemas in The **Netherlands, Lux & France**
Entrance Lux market

2015
Takeover cinema **Mégaroyal** (Bourgoin, FR)

2016
Reopening IMAX Brussel (BE)

2016
Takeover **cinema in Rouen** (FR)

2016
Opening of 5 new-build cinemas (Dordrecht, Breda, Granada, Fenouillet, Utrecht)

2017
Takeover **NH Bioscopen** (NL)

2017
Takeover of Landmark Cinemas (Canada)
45 Canadian complexes

2018
Takeover **El Punt** (ES)
Opening various new-builds (FR, NL, CA)

2019
Takeover MJR Digital Cinemas (US)
10 multi- and megaplexes

2020-2022
Opening of 5 new-builds (FR (2), NL (2), CA(1))

2022
Takeover of 2 Spanish cinemas (Barcelona/ Marbella)
And 1 French cinema (Amnéville)

2023
Takeover 2 French cinemas (Belfort, Béziers)

2024
Takeover of Spanish cinema (Almería)

Key elements for growth

Key elements for future growth

Further recovery visitor numbers driven by Hollywood offering expected to be fully recovered by 2025/2026

Internal expansion (premium concepts)

External expansion

Internal expansion

premium formats & products

Supported by market demand
for more experience

Roll-out of premium formats

and new product development

For a state-of-the-art experience
Supported by the newest cinema technologies

Premium formats & products

IMAX

4DX

Laser Ultra

3D

Screenx

Cosy seats

Vip seats

Premiere seats

ScreenX, 270° viewing experience

Laser ULTRA combines the unique image quality of Barco’s 4K laser projector with immersive Dolby Atmos sound

4DX – 4D movie experience with moving seats, weather simulations and scent effects, perfectly synchronised with the on-screen action.

Cosy Seats Plus, Kinepolis Leidschendam (NL)

Premiere Seats, Landmark Waterloo

External expansion

Supported by **Kinepolis outperforming the market**

Value creation as driver for M&A

Targetting family-held mid-size businesses

In macro-economic healthy regions

Preference to have real estate on board

ESG Focus areas

Best cinema operator

Best marketer

Best real estate manager

Development & empowerment of employees

Employee well-being, diversity and inclusion

Customer Experience excellence

Green and resilient building & infrastructure

Responsible waste management

Human capital self-learning company culture

Empowering employees

to actively contribute to the development of the company and its results

Business ownership

stimulates entrepreneurship

Innovation Lab

all employees are encouraged to think out of the box and come up with new ideas

Talent factory

high internal mobility rate

Yearly Employee survey

PSI

Yearly performance cycle

for 100% of employees

Roll out of intelligent building management systems

save up to 50% energy consumption

led by International Efficiency Engineer for technical installations

Ongoing investments in transition to laser projection

80% of Kinepolis' European screens was laser by the end of 2023

60% at Group level

Towards net zero emissions

by 2050

SCIENCE BASED TARGETS

DRIVING AMBITIOUS CORPORATE CLIMATE ACTION

Creating value for employees, customers, shareholders and partners as well as the environment and communities Kinepolis is part of.

International recognition

Awards

Global Achievement in Exhibition 2014 (CinemaCon, Las Vegas)

Exhibitor of the Year 2017 (CineEurope, Barcelona)

Entrepreneur of the Year 2019 (Onderneming v/h jaar, Brussels)

Milestone award 2024 (CineEurope, Barcelona)

Kinepolis team, CineEurope 2024 Milestone Award

READY

FOR THE FUTURE