



Kinepolis Group

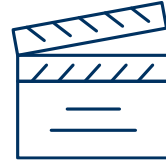


Enriching people's lives
through the power of movies.

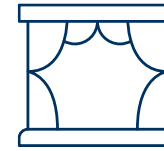


Kinepolis at a glance

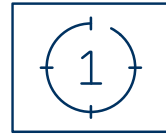
Kinepolis at a glance



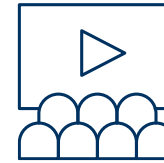
Since
1968



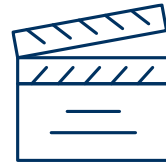
109
Complexes
In 9 countries



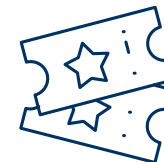
1,131
Screens



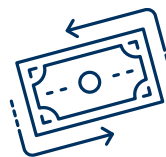
200,000
Seats



3
Brands



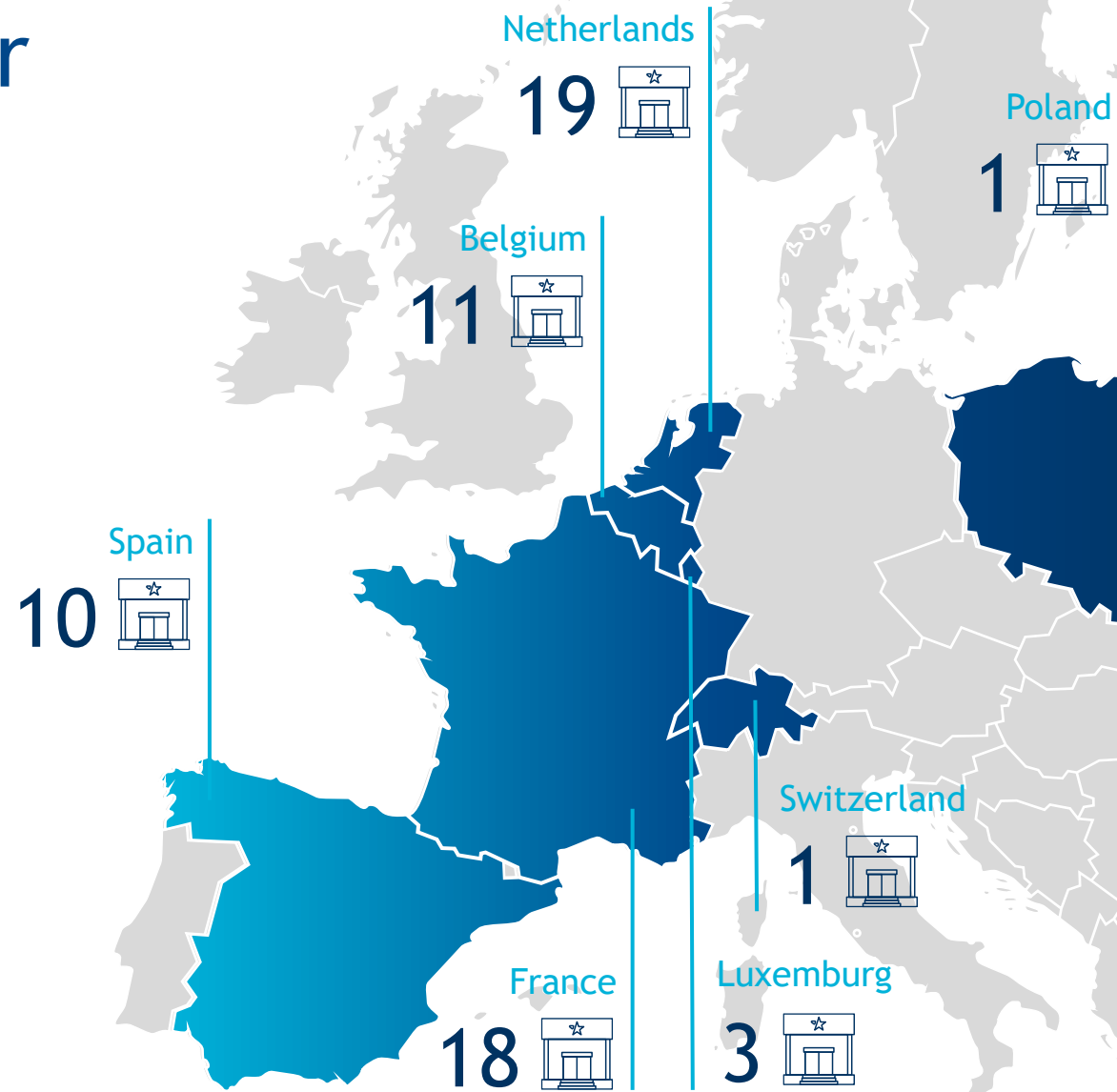
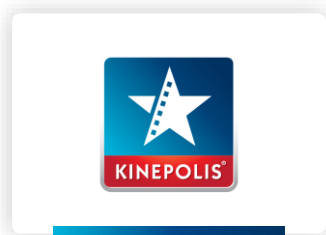
35 MIO
Visitors in 2023



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

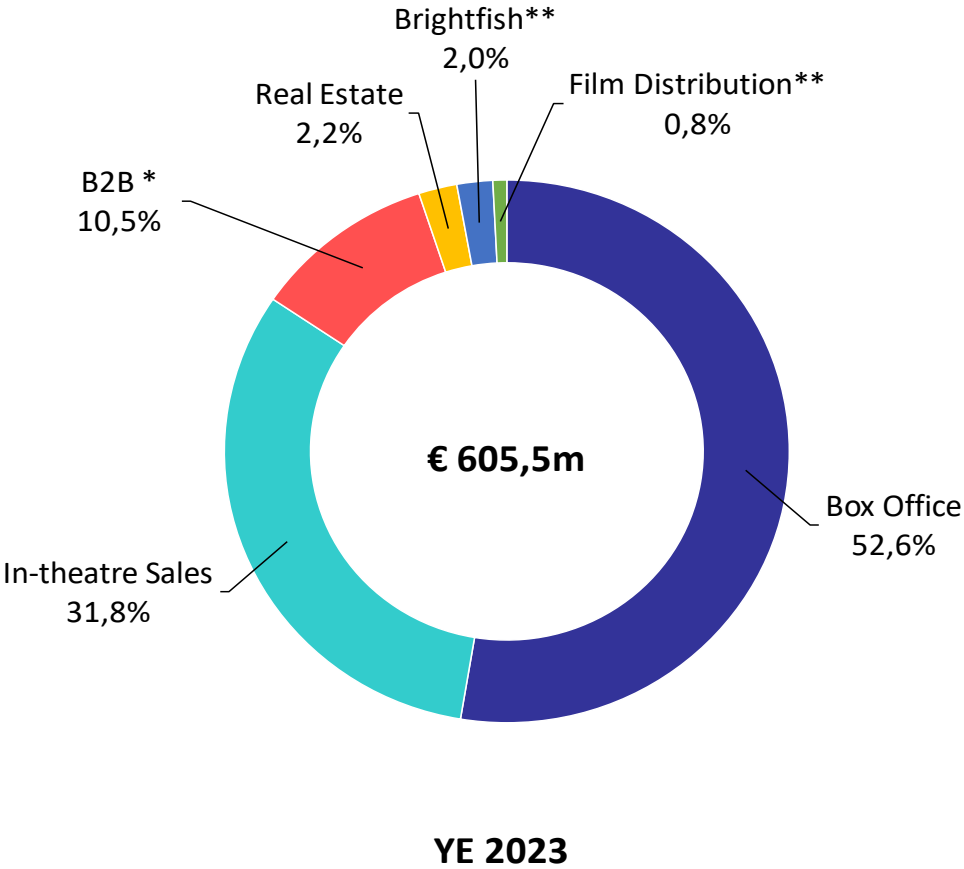
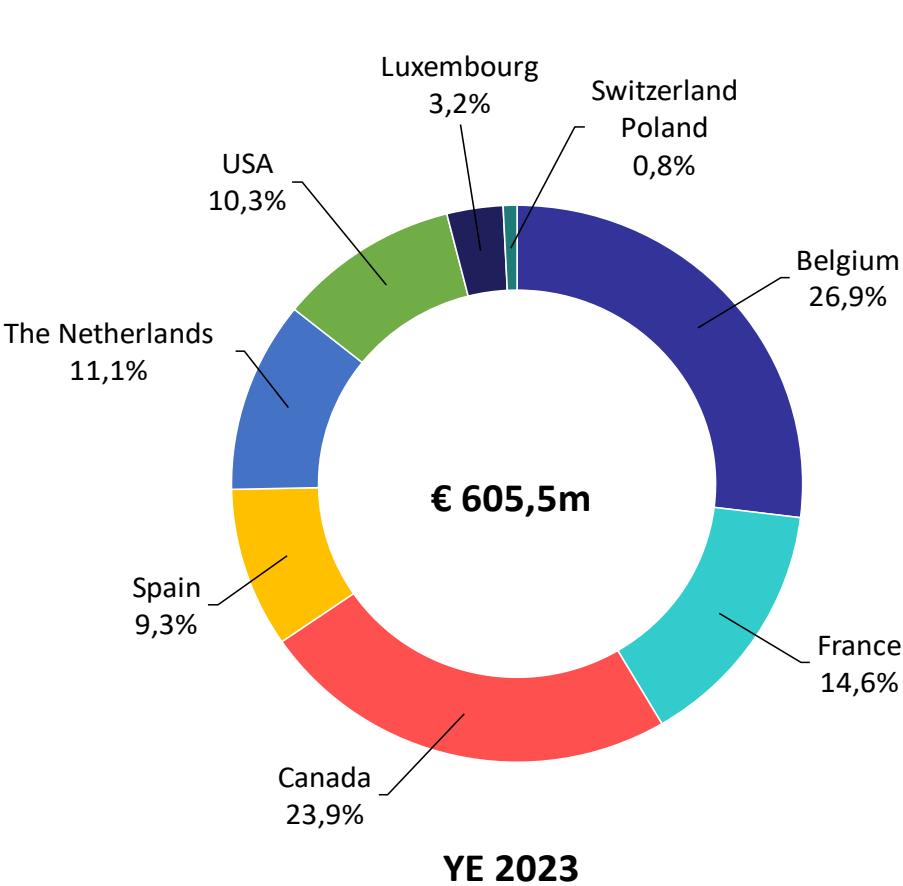


Brightfish -
Screen
advertising



Revenue

By country & activity

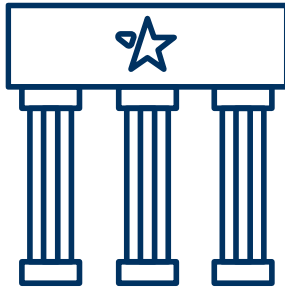




The Kinepolis strategy



3 pillar
strategy



Best cinema operator

1



Best marketer

2



Best real estate manager

3



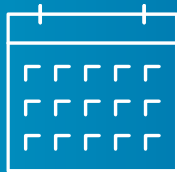
Self-learning organisation based on Business ownership







“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
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ILLUMINATION



LASER
ULTRA
by
KINEPOLIS

LASER
ULTRA
by
KINEPOLIS

14



LASER
ULTRA
by
KINEPOLIS®



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



KINEPOLIS

BOWLING

Brasserie

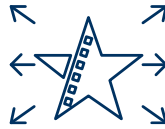
Successful execution of expansion strategy since 2014



Based on

Improvement potential

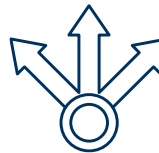
Derived from core strategy



Integration of

Kinepolis' way

of working and management structure



From 23 to 109

Cinemas to date
(Europe and North-America)





Timeline 2014-2023

Covid-19



2015

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

2016

Reopening
IMAX
Brussel
(BE)

2016

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

2019

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

2020-2022

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

2014

Takeover of two
Spanish
cinemas
(Madrid &
Alicante)

2014

Takeover Wolff
Bioscopen cinema
group
Entrance Dutch
market



2015

Takeover
cinema
Mégaroyal
(Bourgoin,
FR)

2016

Takeover
cinema in
Rouen
(FR)

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)

2022

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

2023

Takeover
2 French
cinemas
(Belfort,
Béziers)



Key elements for growth



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

Internal expansion (premium concepts)

External expansion

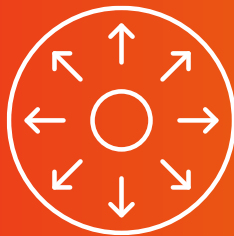
Key elements
for future growth



Internal expansion

premium formats & products

Supported by market demand
for more experience



Roll-out of premium formats

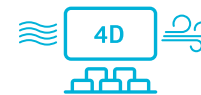
and new product development

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

Premium formats & products



IMAX



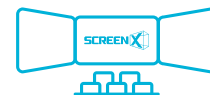
4DX



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, Kinopolis Leidschendam (NL)



Premiere Seats, Landmark Waterloo



Value creation as driver for M&A

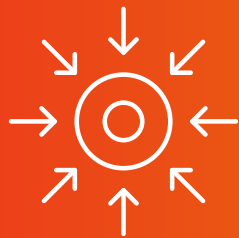
Targetting family-held mid-size businesses

In macro-economic healthy regions

Preference to have real estate on board

External expansion

Supported by Kinopolis
outperforming the market





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



Empowering employees

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



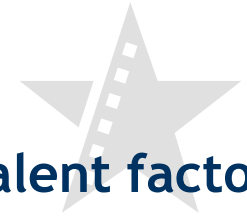
Business ownership

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

Human
capital
self-learning
company
culture



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

