THE BIG PICTURE

Cinema Explained: AR Conference.

For all enquires please contact:

+44 (0) 7881 952740

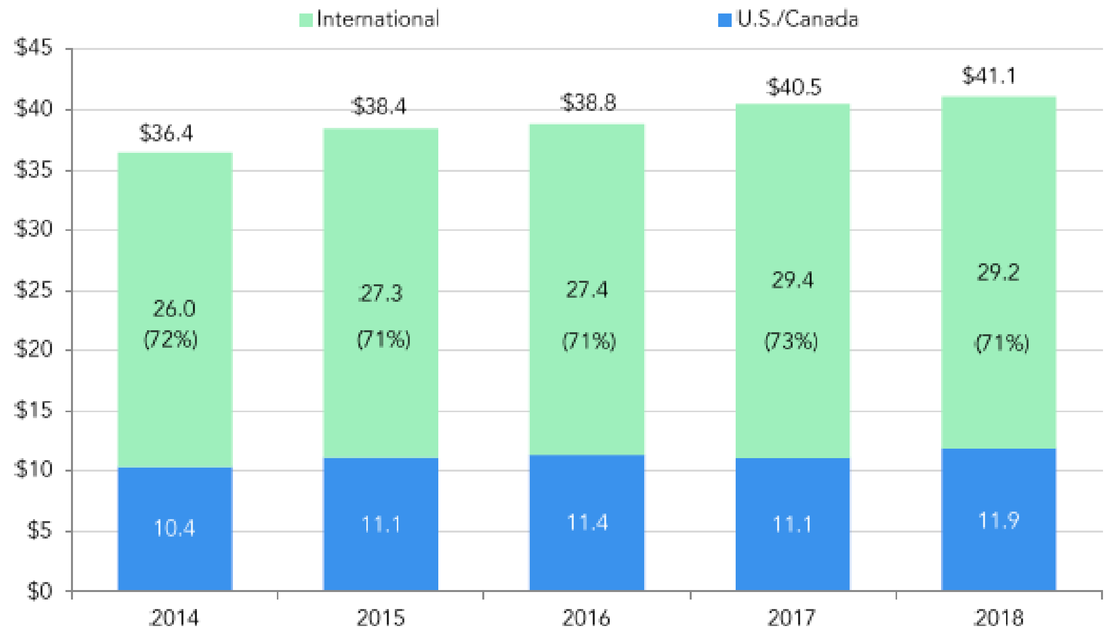
Rob.Arthur@the-bigpicture.com

The Big Picture (Cinema Advisers) Ltd

25 Eccleston Place London, SW1W 9NF

Out of Home Box Office Revenues US$

Global Box Office – All Films (US$ Billions)



	2014	2015	2016	2017	2018	% Change[2] 18 vs. 17	% Change[2] 18 vs. 14
U.S./Canada[3]	$10.4	$11.1	$11.4	$11.1	$11.9	7%	15%
International[4]	$26.0	$27.3	$27.4	$29.4	$29.2	-1%	12%
Total	$36.4	$38.4	$38.8	$40.5	$41.1	1%	13%

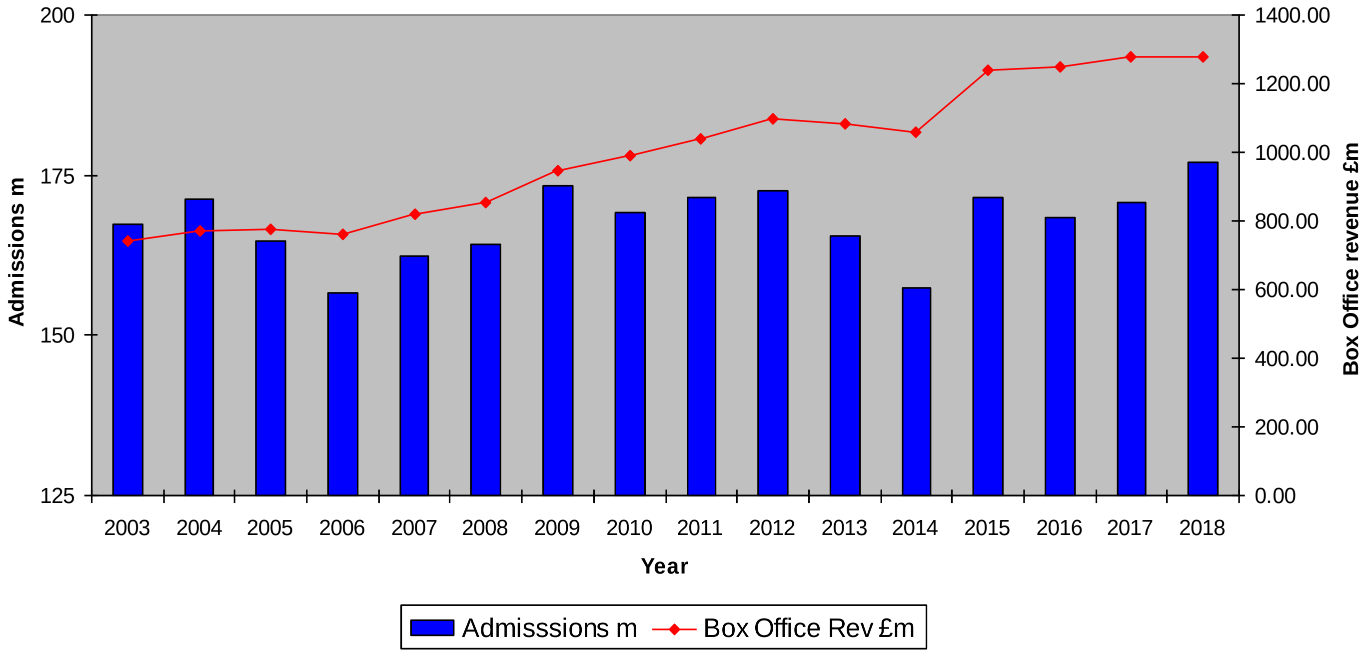
2018 Top 20 International Box Office Markets – All Films (US$ Billions)

Source: IHS Markit, local sources

1.	China[7]	$9.0	11.	Spain	$0.7
2.	Japan	$2.0	12.	Brazil	$0.7
3.	U.K.	$1.7	13.	Italy	$0.7
4.	South Korea	$1.6	14.	Netherlands	$0.4
5.	France	$1.6	15.	Indonesia	$0.4
6.	India	$1.5	16.	Taiwan	$0.3
7.	Germany	$1.0	17.	Poland	$0.3
8.	Australia	$0.9	18.	UAE	$0.3
9.	Mexico	$0.9	19.	Malaysia	$0.3
10.	Russia	$0.9	20.	Hong Kong	$0.3

THE BIG PICTURE

Out of Home - Box Office Revenues £ and Admissions



- 2018 was the best performing year since the 1970's – this year will be similar
- YTD is only -1.9% down on 2018
- October – December 2019 are looking positive starting with The Joker…
- 72% of box office revenues are generated by the Top 200 Cinemas
- 37% of total box office revenues are generated in Retail and Leisure Parks.

Need expert advice? Please get in contact: +44 (0) 7881 952740 | rob.arthur@the-bigpicture.com | The Big Picture (Cinema Advisors) Ltd, 25 Eccleston Place London, SW1W 9NF

THE BIG PICTURE

We transform places through cinema and leisure

THE BIG PICTURE

The Development Programme

Vision & Strategy

- Site Appraisals support
- Catchment Analysis
- Master Planning & Design (cinema advisory)

Viability & Procurement

- Feasibility
- Development Management
- Operator Selection

Consultation & Consent

- Planning & Licence (cinema advisory)
- Architecture (specialist cinema support)

Delivery

- Asset Management
- Project Management
- Commercial Agents (working with)

موفي
muvi
CINEMAS سينما

https://www.razawhitepaper.com/

Need expert advice? Please get in contact: +44 (0) 7881 952740 | rob.arthur@the-bigpicture.com | The Big Picture (Cinema Advisors) Ltd, 25 Eccleston Place London, SW1W 9NF

THE BIG PICTURE

Retail and Leisure Destination

There is a fine balance to deliver a Leisure and Retail Destination:

- The Vision.
- Public and Private Sector alignment.
- Co-operation and Commitment amongst all stakeholders to connect the various strands into a Leisure and Retail Destination.
- Development Strategy aligned to Licenced Operating Plans.
- Quality of Management, Brand offer and the ability for the operator to re-invest. Understanding of the local market.
- Covenant Strength / Investment Value / Lease Term
- The "Wow Factor" – Planning for the Future.

Paramount A VIACOM COMPANY | SONY PICTURES RELEASING | UNIVERSAL | WARNER BROS. PICTURES | Walt Disney STUDIOS MOTION PICTURES, UK

Dartford – Westgate Development (Muse)

- An opportunity to grow market share in the key London area.
- The Borough of Dartford has a young population with an average age of 37.9 (2 years younger than the UK average).
- 67% of the population are aged between 16 – 64 years.
- Population density of Dartford at 1,382 people per square kilometre, significantly higher than the UK average of 413.
- Fifteen minutes drivetime population of 290,539, which is highly concentrated in Dartford.
- The population of Dartford is projected to grow by 47 percent increase by 2031.
- 25% of the town population do not own a car and live local, but have access to excellent public transport links.
- Dartford Railway Station is now designated as a TFL Zone 8 station for Oyster Card users.
- Proposals for a Crossrail extension to Dartford are underway.
- Up to 11,000 new homes will be built within the Borough.
- Central Park is used for various outdoor events including the Summer Cinema Season.

"Through high quality design and innovative thinking Dartford will be a place which invests in its people and future generations celebrating their creativity and talent to deliver on the aspiration to make Dartford a 'Town Centre for the Future' – Dartford Borough Council.

THE BIG PICTURE

Rotherham Forge Island

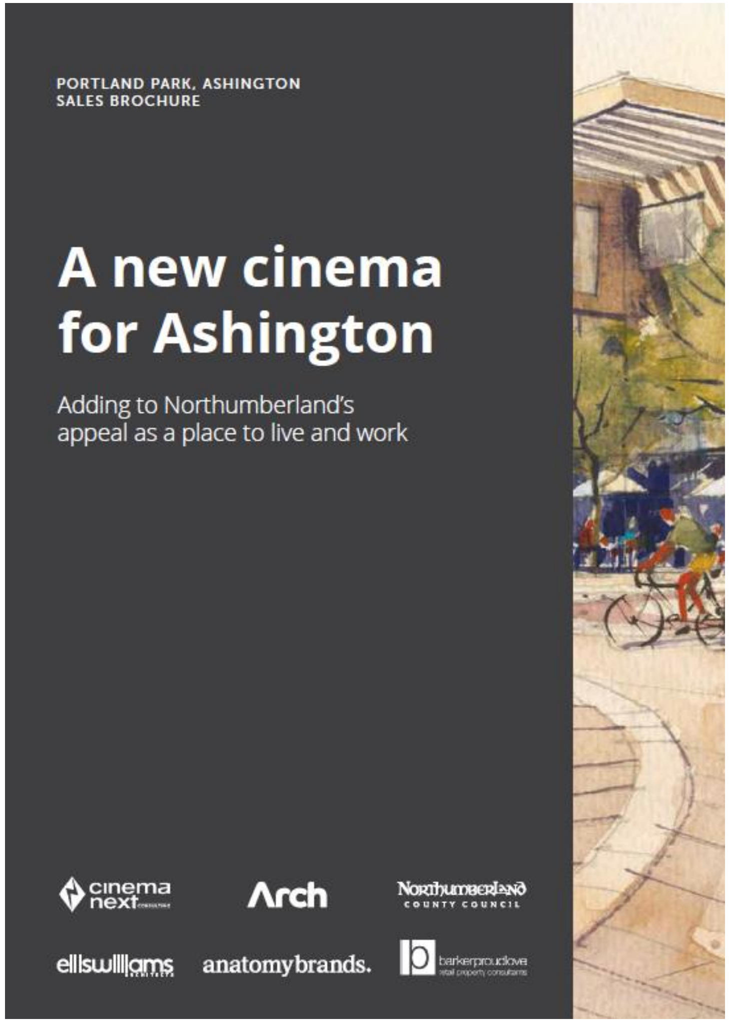
- 1.75ha site situated in a prime waterside location
- Twenty minutes drivetime delivers a total population of 240k residents – very local and concentrated
- 2 million customers in 30 minutes' drive
- Population will grow by 6.3% in the period to 2031
- Great British High Street Winner, 2015
- Over 300 independent & national retailers
- The UK's 4th busiest street market
- 8 million annual pedestrian flow
- 160 bus routes serving the town centre
- 2,000 town centre parking spaces
- Voted Best Large Outdoor Market, 2016
- 600,000 sq ft of commercial floor-space
- 14 acre conservation area

The Vision is that, "Rotherham Town Centre will become a place people will choose to use. It will become a bustling historic market town strengthened through a range of high impact place making projects".

Need expert advice? Please get in contact: +44 (0) 7881 952740 | rob.arthur@the-bigpicture.com | The Big Picture (Cinema Advisors) Ltd, 25 Eccleston Place London, SW1W 9NF

Cinema Development Benefits

- **Regeneration:** The Vision will attract leisure and retail investment.
- **Sustainability:** A high-quality cinema experience will provide improved trading opportunities each day and in particular during school holiday periods; and in the 6pm through to 9pm peak cinema trading hours.
- **Employment:** A cinema will generate direct and indirect employment opportunities and create a more diverse range of opportunities for the local population.
- **Community Development:** Cinema is about an experience, with customers engaging positively with film, entertainment and cultural events as well as with a mix of food and drinks.
- **Additionality:** Cinema provides incremental screening opportunities as well as providing greater access to those parts of the population who are unable to travel to out of town destinations.




McDONALDS
FACTORY STORE
LEISURE CENTRE
LIDL
ASDA
THE SITE
FORMER CO-OP
STATION ROAD RETAIL
WILKO

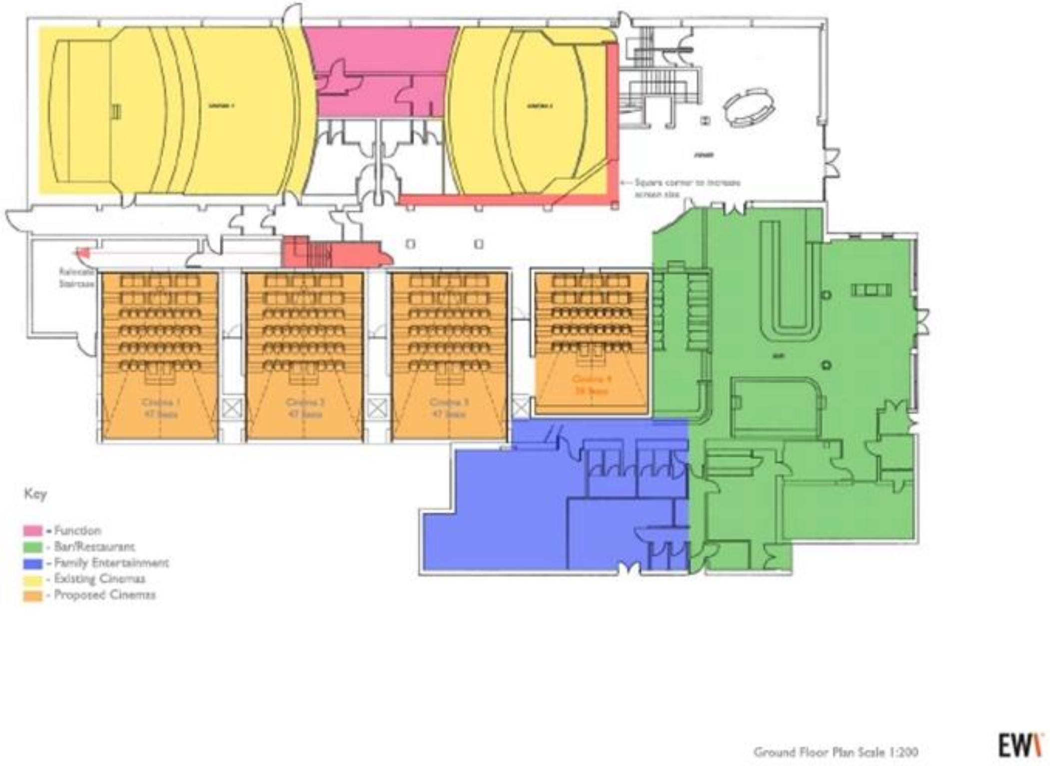

CINEMA
CINEMA

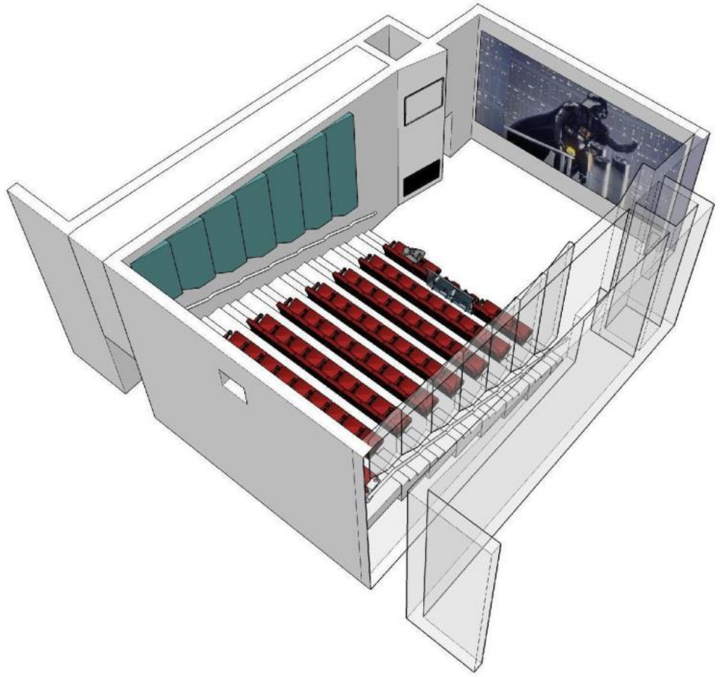
Silverburn, Glasgow

- In 2015, Silverburn extended the Centre's offer with a leisure development.
- The £20 million, 100,000 square foot extension was a significant addition to the footprint of Silverburn.
- Anchored by a 50,000-square foot, 14-screen Cineworld multiplex.
- Silverburn's leisure extension included an overhaul of the food and beverage offer.
- Silverburn has experienced a 7.9% increase in footfall and 11.7% increase in like-for-like F&B sales.

http://silverburn.cmail19.com/t/ViewEmail/y/5BFC8229CB4C1226/916B2AC456289A01F7E8006BBCB98688

THE BIG PICTURE

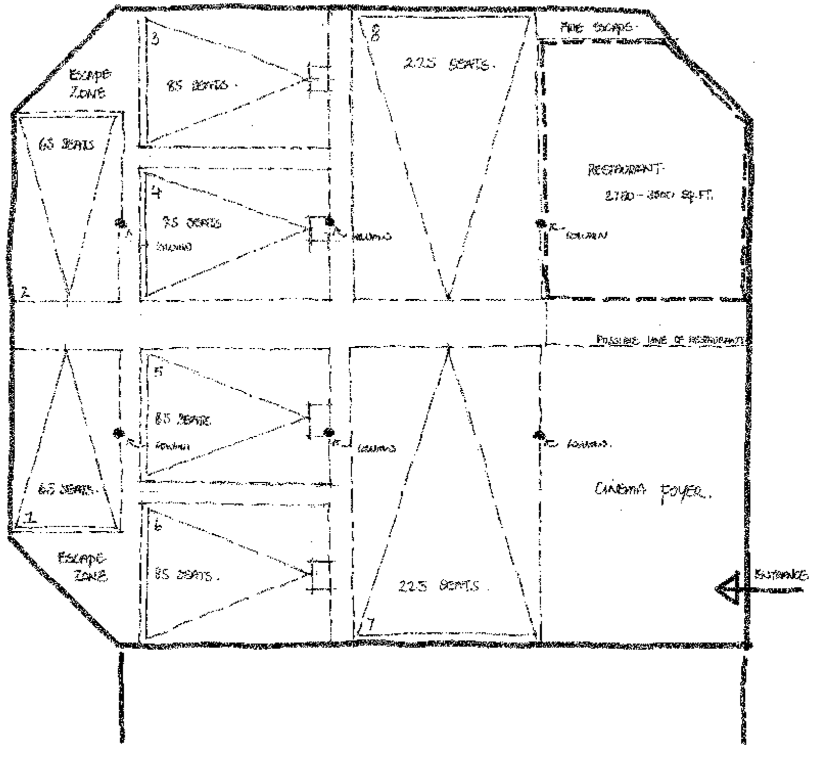


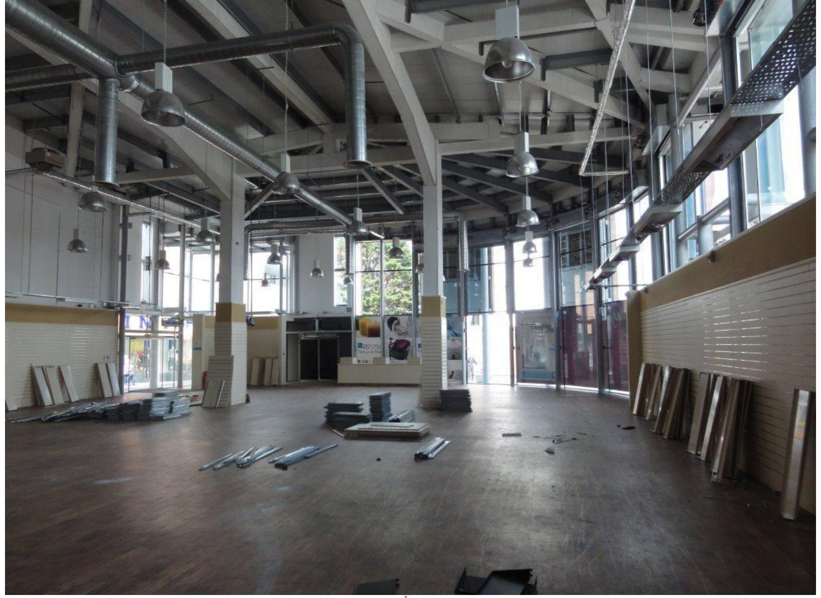


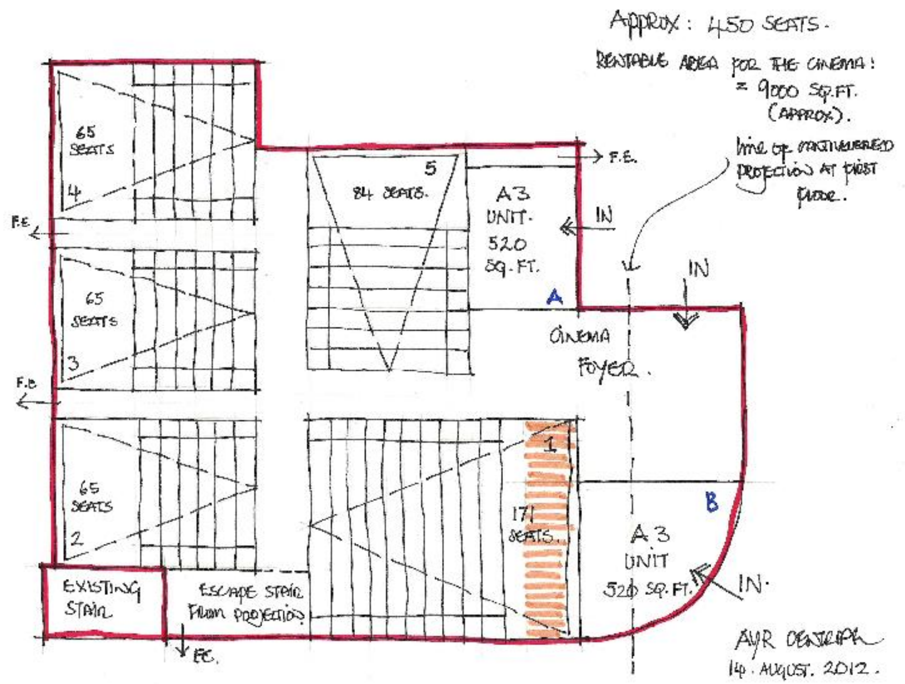
65 seats can be achieved in 115m2 gross area 650m2 volume.

Ceiling to floor heights can be as low as 3.5m

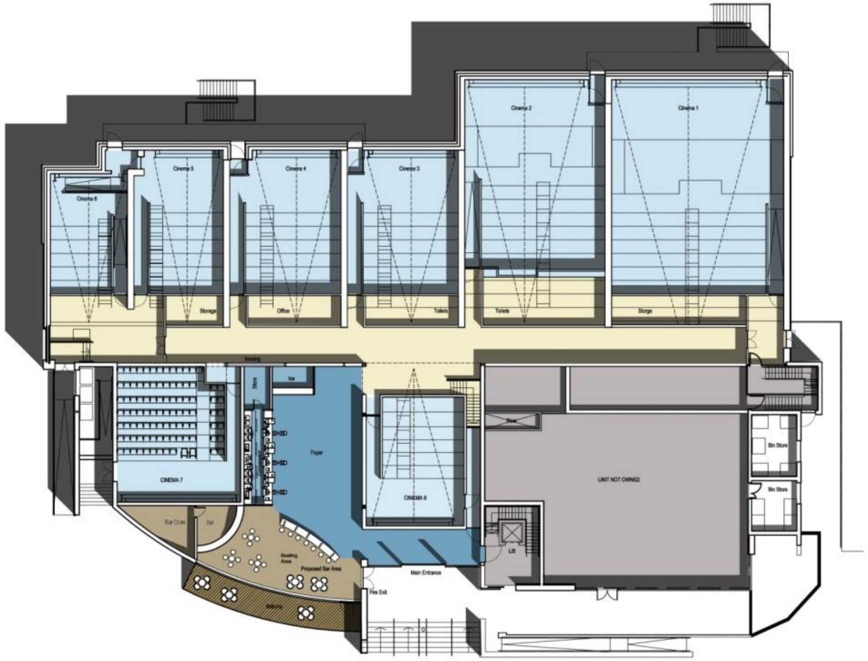
THE BIG PICTURE

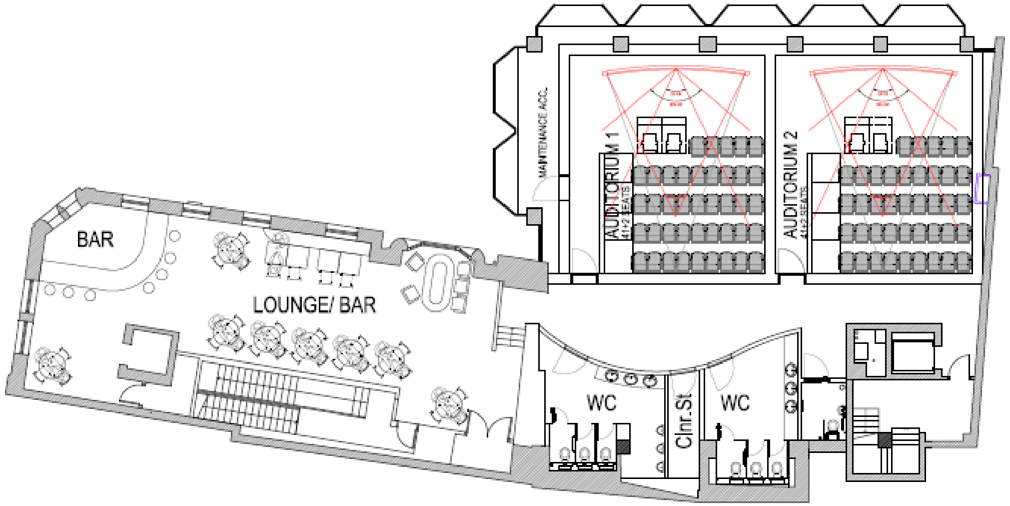






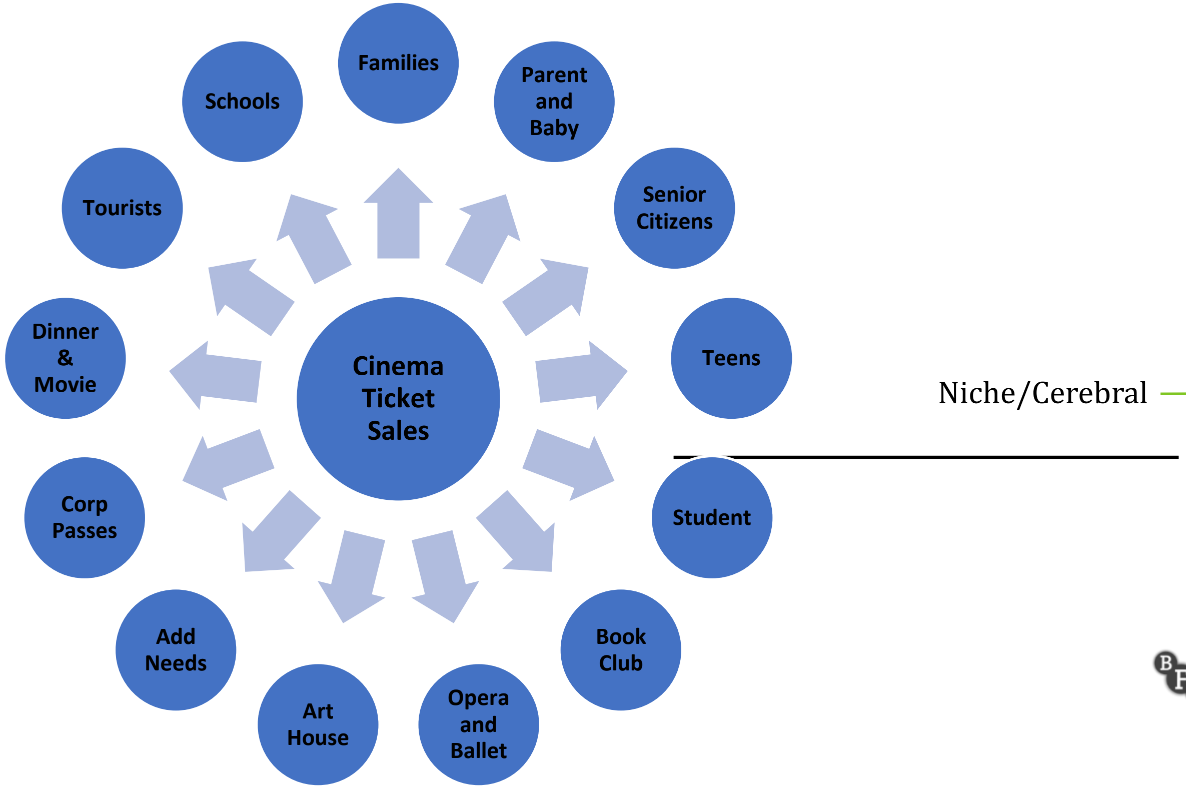
Need expert advice? Please get in contact: +44 (0) 7881 952740 | rob.arthur@the-bigpicture.com | The Big Picture (Cinema Advisors) Ltd, 25 Eccleston Place London, SW1W 9NF

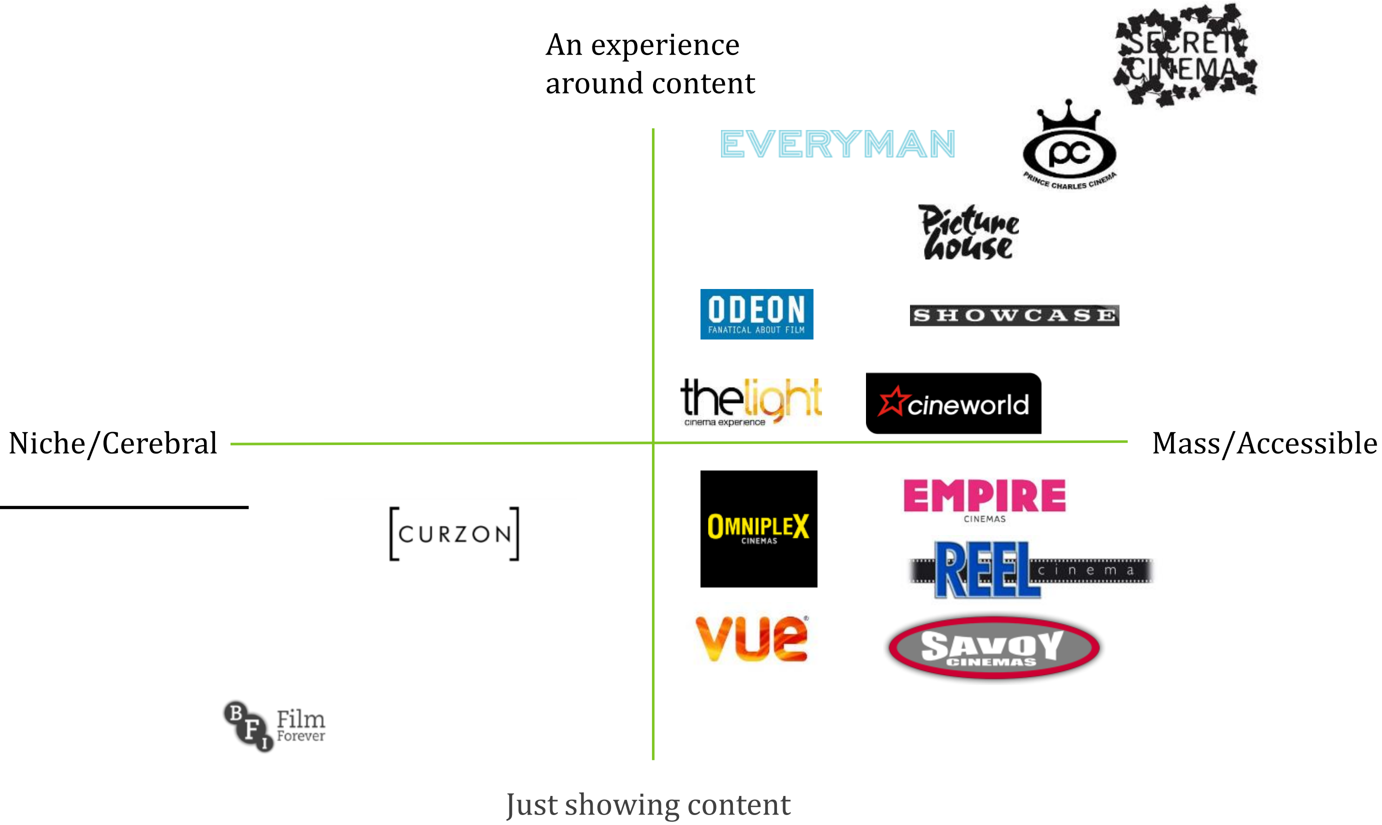


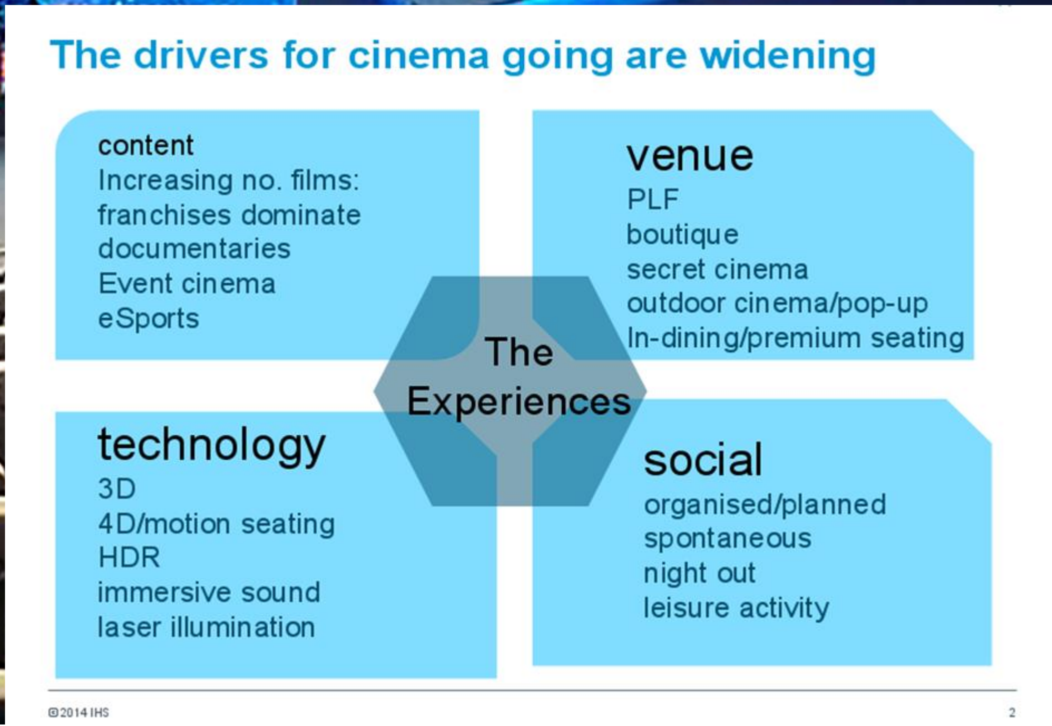

BAR
LOUNGE/ BAR
MAINTENANCE ACC.
AUDITORIUM 1
AUDITORIUM 2
WC
Clnr.St
WC


CHIQUITO

THE BIG PICTURE







MARINA MALL DOLBY CINEMA
DUBAI, UAE

Home Cinema In the Cinema

VIP - Luxury Cinemas with Full Service to Seats

Serving a sophisticated or specialized clientele. “Once one is introduced in any location, everybody raves about it. But it’s a challenge to operators because it’s a whole different way of doing things”.

The first company in Turkey to introduce advanced film technologies

4DX · STARIUM · SCREENX · IMAX · AYRICALIKLI VE KONFORLU GOLD CLASS · D-BOX · TEMPUR CINEMA yatsan · MPX MARS PREMIUM EXPERIENCE

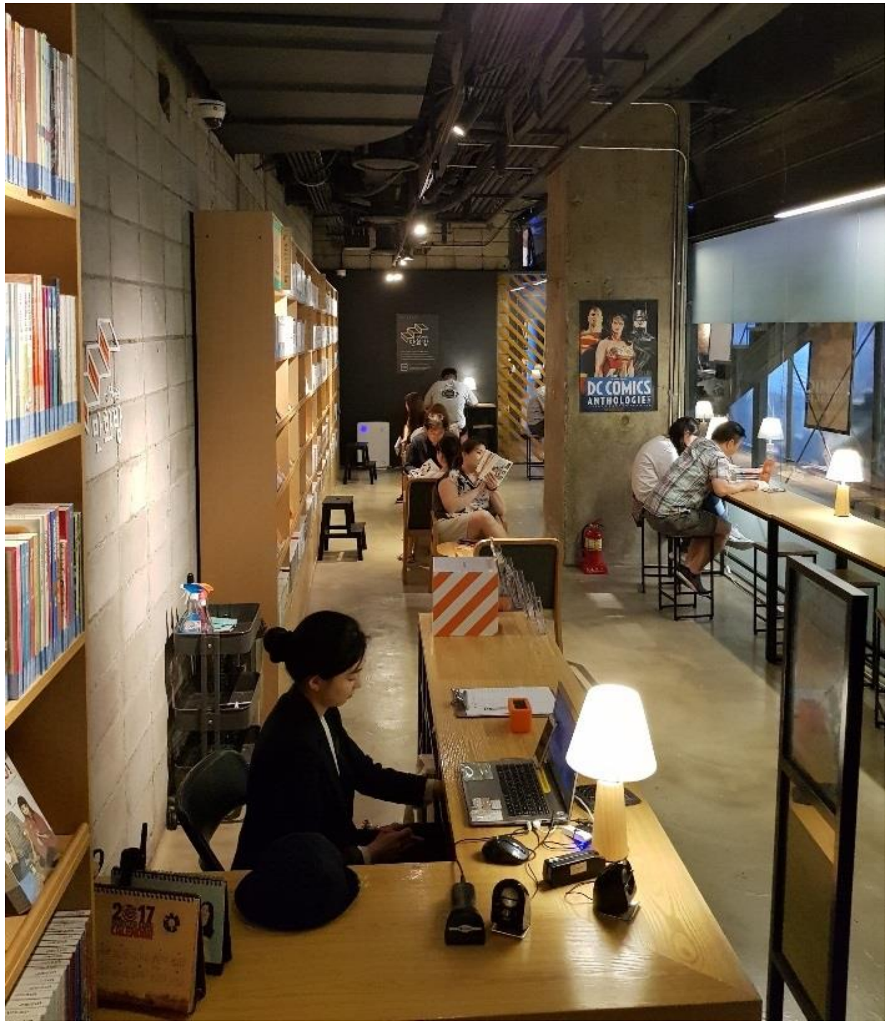
We constantly search and invest in new cinema technologies

Day Beds to 4DX

CGV's aim is,"To go beyond the regular definition of cinema, and turn it into a service platform, which brings entertainment and culture together."

CGV call this new approach the "Cultureplex"

Marvel Boutique / Manga Lounge



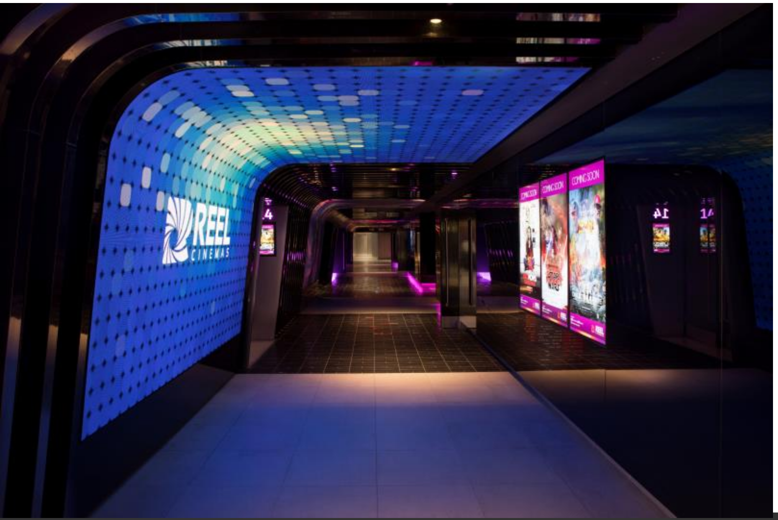
Kids Events

http://villagecinemas.com.au/vjunior

In Summary

Cinemas

- Are changing
- It's Not Just a Box
- Can trigger re-purposing with the right mass, not on their own
- Can also solve issues with existing buildings
- Create social and cultural hubs
- Can be a multi-media resource - conferences, live theatre, film festivals
- U.K. expertise is crucial to the development of cinema - here and internationally



THE BIG PICTURE

—

For all enquires please contact:

+44 (0) 7881 952740

Rob.Arthur@the-bigpicture.com

The Big Picture (Cinema Advisers) Ltd

25 Eccleston Place London, SW1W 9NF

THE BIG PICTURE

Our Team

John Sullivan

john.sullivan@the-bigpicture.com
+44 (0) 7768 013 702

Mike Thomson

mike.thomson@the-bigpicture.com
+44 (0) 7894 480 669

Rob Arthur

rob.arthur@the-bigpicture.com
+44 (0) 7881 952 740

Judith Querfurth

judith.querfurth@the-bigpicture.com
+44 (0) 7807 013 265