Odeon & UCI Finco plc

ODEON & UCI Cinemas Group

FY 2012 Investor Presentation

26 March 2013

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Forward-Looking Statements

- **Forward-Looking Statements**

  This document includes forward-looking statements. When used in this document, the words “anticipate”, “believe”, “estimate”, “forecast”, “expect”, “intend”, “plan” and “project” and similar expressions, as they relate to ODEON, its management or third parties, identify forward-looking statements. Forward-looking statements include statements regarding ODEON’s business strategy, financial condition, results of operations, and market data, as well as any other statements that are not historical facts. These statements reflect beliefs of ODEON’s management, as well as assumptions made by its management and information currently available to ODEON. Although ODEON believes that these beliefs and assumptions are reasonable, the statements are subject to numerous factors, risks and uncertainties that could cause actual outcomes and results to be materially different from those projected. These factors, risks and uncertainties expressly qualify all subsequent oral and written forward-looking statements attributable to ODEON or persons acting on its behalf.

Q4 2012 Results Highlights

- Highest quarterly earnings of all time achieved in Q4.
- Film slate was much stronger than previous year, causing market attendance on average to increase by 14% in our territories combined.
  - UK + Ireland market attendances increased 23% vs Q4 2011, due to the phenomenal performance of ‘Skyfall’, which became the biggest UK box office success ever, with £102m of box office full run, and strong results of ‘Twilight Breaking Dawn Part 2’ and ‘The Hobbit’.
  - German market increased 31% vs Q4 2011, which also had the benefit of higher attendance of ‘Madagascar’ in October.
  - Spanish market performed well, rising by 8%, due to the local success ‘Lo Imposible’, becoming top film of the year with 5.9m attendees in the market.
  - Italian market was up less than other markets, as some local titles were postponed to 2013. All Top 5 films in the quarter were Hollywood titles.
- Group attendance was up 21%, with LFL paid attendance up 18%.
- Group revenue(2) of £232m was ahead 21% in total estate and 18% in LFL, in line with the attendance growth.
- Group EBITDA(3) of £54m was ahead 67%, and LFL EBITDA of £51m was ahead 60%.

Q4 markets(1) up 14%

Our Q4 attendance up 21%

Our Q4 revenue(2) up 21%

EBITDA(3) in Q4 was £54m

(1) Weighted average of all our territories attendance
(2) Constant fx rates
(3) EBITDA includes £9.1m credit to rent in 2012 with regard to prior years.

Full Year 2012 Results Highlights

- First quarter was soft, due to weak film slate exacerbated by poor cinema-going weather.
- Second quarter was our strongest second quarter ever, with strong titles and favourable weather in April and May, but much softer results in June due to the European football championship and weaker slate in all territories.
- Third quarter was heavily impacted by the Olympic and Paralympic games, a weak film slate and very warm and dry weather in Mediterranean area.
- Fourth quarter was our best quarter ever, with strong film slate and more favourable weather.
- For the full year, group attendance was up 4%. LFL attendance was 2% down.
- Group revenue(2) of £724m was up 4%, and LFL revenue was down 2%.
- Costs were controlled tightly, decreasing 3% LFL, or flat on previous year excluding the prior year credit to rent.
- EBITDA(3) of £91m was down 3% vs prior year, and LFL EBITDA of £82m was down 10%.

2012 markets(1) down 3%

Our 2012 attendance up 4%

Our revenue(2) up 4%

EBITDA(3) in 2012 was £91m

(1) Weighted average of all our territories attendance
(2) Constant fx rates
(3) EBITDA includes £9.1m credit to rent in 2012 with regard to prior years.

Total Market by Major Territory

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	Q4 2011	Q4 2012	Variance	FY 2011	FY 2012	Variance
UK Attendance (k)	40,413	49,901	+23%	172,058	172,499	--
Germany Attendance (k)	32,702	42,699	+31%	129,579	135,232	+4%
Spain Attendance (k)	26,007	28,051	+8%	98,383	92,916	(6%)
Italy Attendance (k)	33,838	33,899	0%	112,120	101,001	(10%)
Average Market Increase/(Decrease) for group territories (1)			**+14%**			**(3%)**
Group Paid Attendance (k)	21,642	26,160	21%	79,191	82,344	4%
Group LFL Paid Attendance (k)	21,372	25,315	18%	78,299	76,438	(2%)

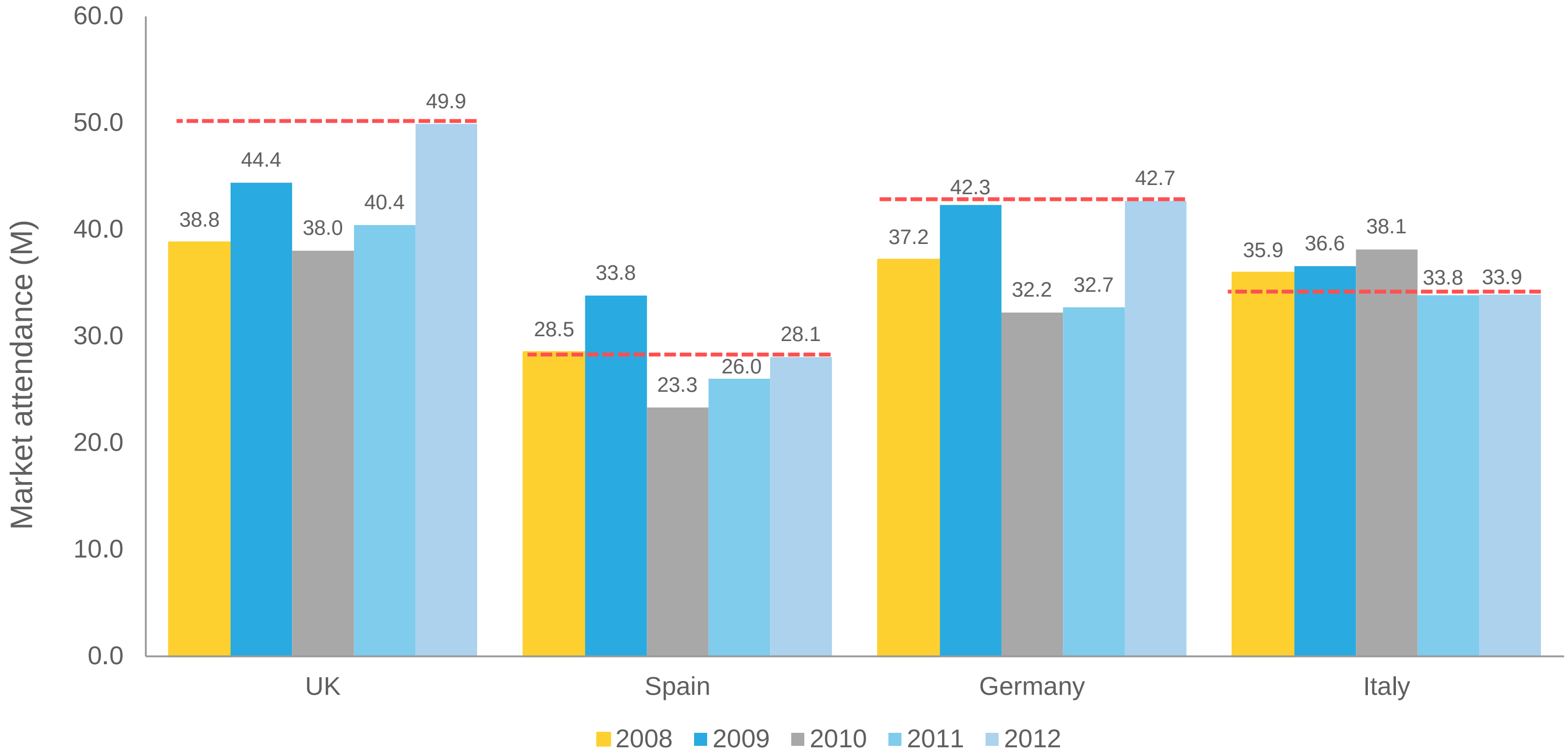
- Market attendance in Quarter 4 was stronger across all territories.
  - In the UK, ‘Skyfall’ record-breaking results were the main driver of market attendance.
  - In Germany, ‘Skyfall’ performed very well to be the 2nd biggest film of the year, and ‘Madagascar’ was also strong.
  - In Spain, the market was up YoY despite the increase in ticket prices from the rise in VAT, because of the strong performance of ‘Lo Imposible’.
  - In Italy, the market was also slightly up despite fewer local titles this year.
- Average market attendance in full year 2012 was down 3% vs prior year.

NOTE: Full year 2012 figures are estimated and subject to final confirmation from the relevant film industry bodies.

(1) Weighted average of all our territories

Markets in Q4

- In UK and German markets, the attendance in Q4 2012 was the highest of the last 5 years.
- The results in Spain were strong compared to the last 2 years, despite the VAT increase on ticket prices.
- Italy was in line with previous years, despite some local films postponed from Q4 2012 to 2013.

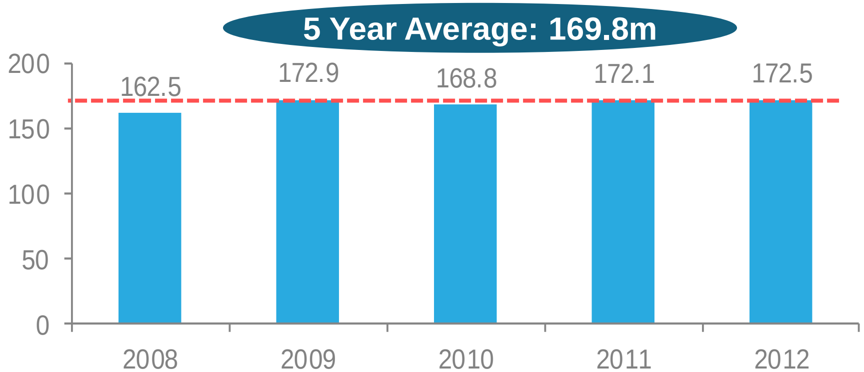


2012 Market level

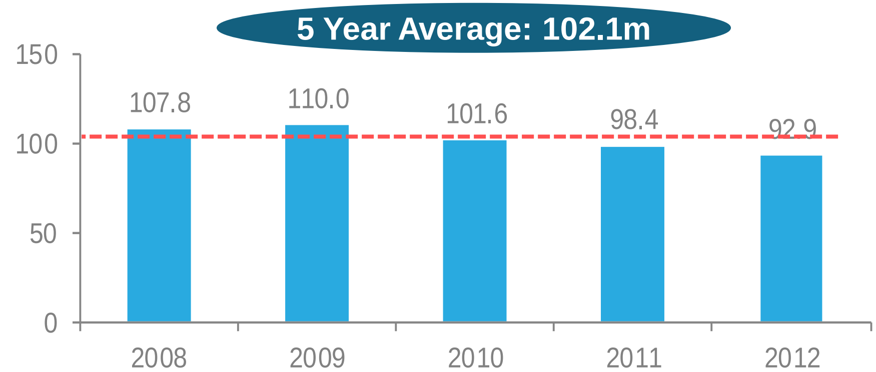
Full Year Market Attendance

- Our markets for the year were on average the lowest for over 10 years because of a combination of negative impacts.
  - Germany was ahead, with strong results in particular for 'The Intouchables' and 'Skyfall'.
  - In UK, strong Q4 titles, especially 'Skyfall', offset the weakness earlier in the year, impacted by the Golden Jubilee, the European Football Championships and the Olympics and Paralympics.
  - Spain and Italy were below 2011 because of weaker first nine months, with a thinner film slate, unusually adverse weather and the impact of the European Football Championships, with both countries playing to the final.

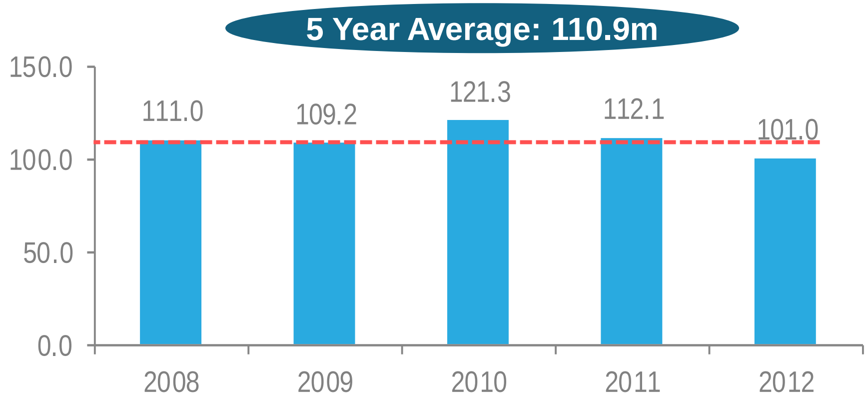
UK 2008-2012 Market



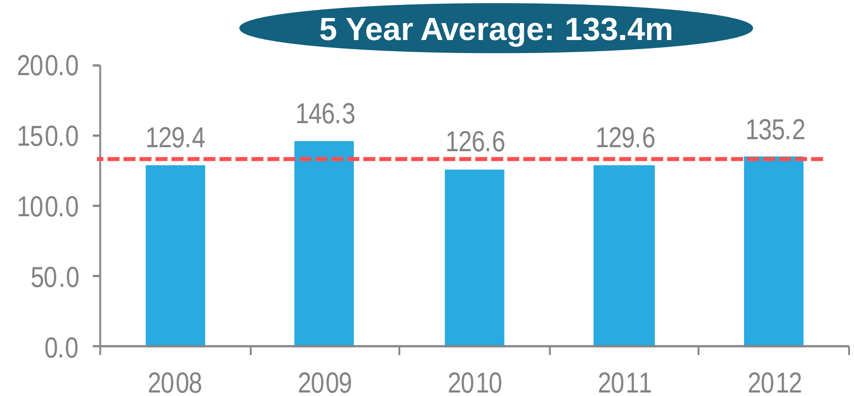
Spain 2008-2012 Market



Italy 2008-2012 Market



Germany 2008-2012 Market



NOTE: Full year 2012 figures are estimated and subject to final confirmation from the relevant film industry bodies.

Top Films Q4 - UK & Ireland

- Last year, 'Twilight Breaking Dawn Part 1' was the break-out film of the quarter.
- This year, 'Skyfall' achieved the 1st rank in the quarter, with record results (£100m).
- 'The Hobbit', 'Twilight Breaking Dawn Part 2' and 'Taken 2' this year also performed strongly in UK and Ireland, leading to a 113% rise in box office revenue for the Top 5 films.
- UK/Ireland market box office was 33% above prior year.

Top 5 UK & Ireland Titles in Q4 2011	£m
Twilight Saga: Breaking Dawn Part 1	30
Johnny English Reborn	21
Arthur Christmas	20
The Adventures Of Tintin	16
Sherlock Holmes: A Game Of Shadows[3]	15
Total	**102**
Total Market	**269**

Top 5 UK & Ireland Titles in Q4 2012	£m
Skyfall [1]	100
The Hobbit An Unexpected Journey [2]	37
Twilight Saga: Breaking Dawn Part 2	35
Taken 2	24
Madagascar 3	22
Total	**219**
Top 5 Variance to Q4 2011	*+113%*
Total Market	**357**
Total Market variance	*+33%*

[1] Estimated Full Run 'Skyfall' £102m
[2] Estimated Full Run 'The Hobbit' £52m
[3] Full Run 'Sherlock Homes' £26m

Top Films Q4 – Continental Europe

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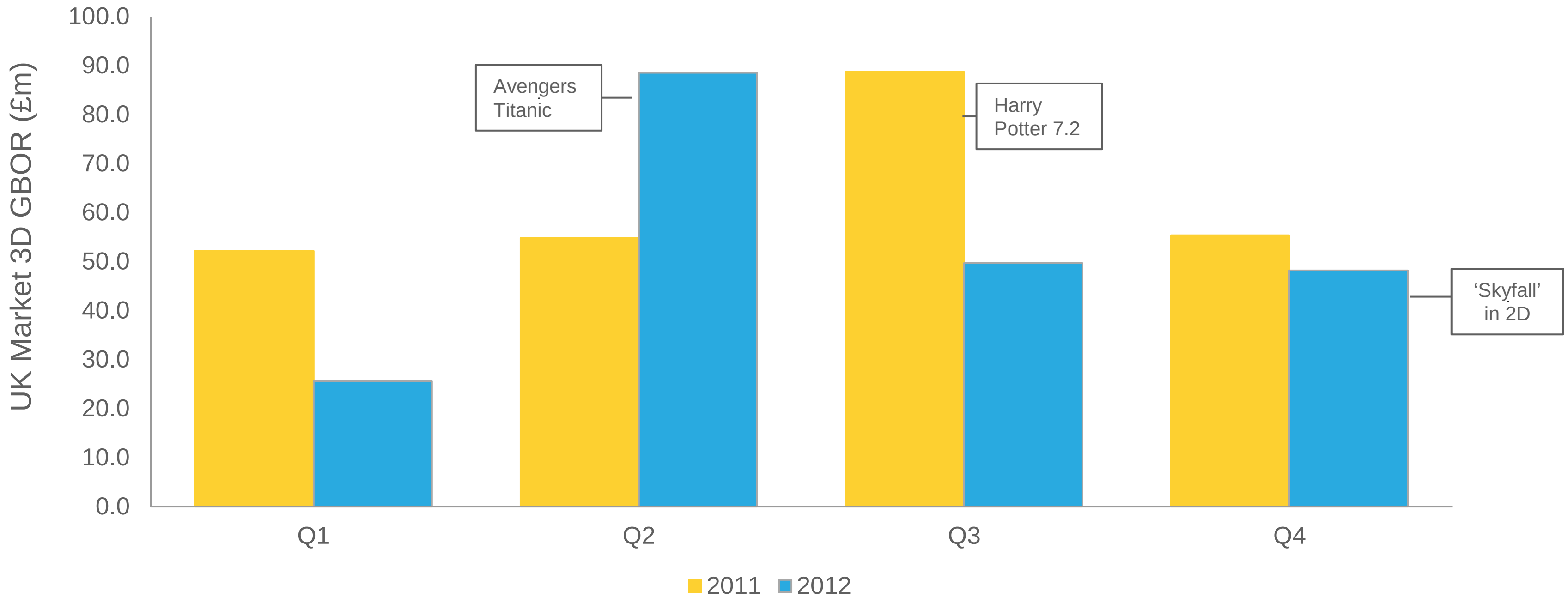
- High admissions in Q4 in Spain were driven by the good results of the local film ‘Lo Imposible’, becoming the 1st film of the year.
- Strong performance of ‘Skyfall’ in Germany, made it the 2nd film of the year. Four films in Q4 2012 did more admissions than the top film in 2011.
- Italy was slightly up vs prior year in Q4, despite an absence of local product.

Local titles in red

	2011		2012		% change
		Q4 Actual (Adm m)		Q4 Actual (Adm m)	
Spain	Twilight Saga: Breaking Dawn Part 1	3.0	Lo Imposible	5.9	
	The Adventures of Tintin	2.5	Twilight Saga: Breaking Dawn Part 2	3.2	
	Puss In Boots	2.1	The Hobbit	2.2	
	In Time	0.9	Hotel Transylvania	1.7	
	Fuga de Cerebros 2	0.8	Skyfall	1.5	
	Top 5 Total	**9.2**	**Top 5 Total**	**14.5**	**56%**
	Total Market	**26.0**	**Total Market / Variance from Q4 2011**	**28.1**	**8%**
Germany	Twilight Saga: Breaking Dawn Part 1	3.0	Skyfall	7.2	
	Puss In Boots	2.0	The Hobbit	4.3	
	Wickie Auf Grosser Fahrt	1.7	Madagascar 3	3.8	
	Johnny English 2	1.6	Twilight Saga: Breaking Dawn Part 2	3.4	
	The Adventures of Tintin	1.3	Hotel Transylvania	1.1	
	Top 5 Total	**9.7**	**Top 5 Total**	**19.9**	**105%**
	Total Market	**32.7**	**Total Market / Variance from Q4 2011**	**42.7**	**31%**
Italy	Twilight Saga: Breaking Dawn Part 1	2.6	Twilight Saga: Breaking Dawn Part 2	3.1	
	Sherlock Holmes 2	2.2	Ice Age 4: Continental Drift	2.6	
	I soliti idioti	1.8	Skyfall	2.1	
	La peggior settimana della mia vita	1.6	Ted	1.8	
	Puss In Boots	1.5	The Hobbit	1.8	
	Top 5 Total	**9.7**	**Top 5 Total**	**11.4**	**18%**
	Total Market	**33.8**	**Total Market / Variance from Q4 2011**	**33.9**	**0%**

3D Quarterly UK Market Performance

- Q1 was a weak quarter for 3D films, but Q2 saw a strong recovery in the penetration of 3D, with 'The Avengers' and 'Titanic' performing very well.
- 3D results in Q3 were weaker than previous years, as the main films in the quarter were 2D ('The Dark Knight Rises' and 'Ted'), vs 'Harry Potter' in 3D last year.
- Some good 3D films were released in Q4 2012 ('The Hobbit', 'Life of Pi'), but the record breaking results of 'Skyfall', released in 2D, captured more of the public's attention.



3D slate for 2013 look stronger than in 2012

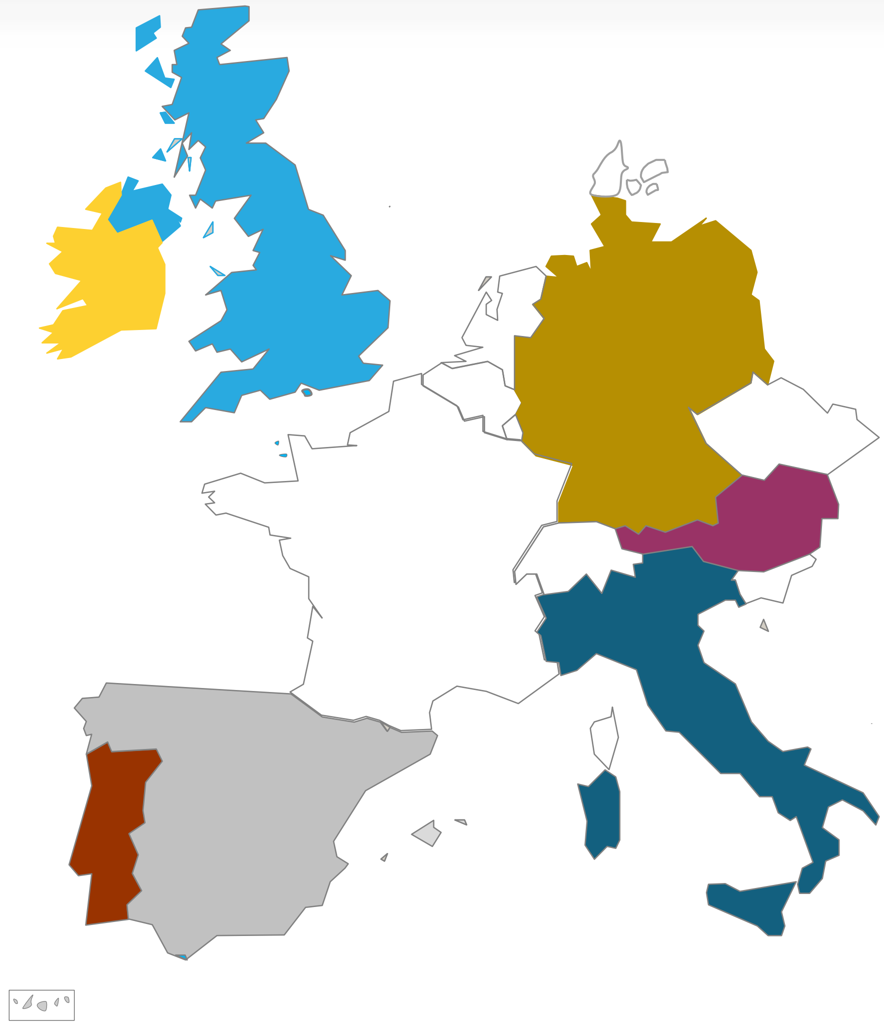
Unique pan-European footprint

UK
- Sites: 112
- Screens: 869
- 25% market share

Ireland
- Sites: 10
- Screens: 68
- 17% market share

Spain
- Sites: 44
- Screens: 521
- 21% market share

Italy
- Sites: 41
- Screens: 435
- 17% market share



Germany
- Sites: 23
- Screens: 203
- 7% market share

Austria
- Sites: 3
- Screens: 38
- 10% market share

Portugal
- Sites: 3
- Screens: 45
- 13% market share

We now have c.20% market share in 4 important markets with 236 sites and 2179 screens

Note: Site and screen numbers as at December 2012. Market share as at Dec 2012 and based on Gross Box Office for UK and Ireland and attendance for the rest of territories.

Q4 & Full Year 2012 Financial Highlights

- Q4 was our strongest quarter for earnings ever, but the year ended slightly down because of the weak start.

  - ATP and RPH, increased in Q4 and the year, in spite of lower 3D mix, reflecting the benefit of investments in initiatives and refurbishments.
  - Screen Advertising(1) in Q4 LFL was 17% ahead of 2011, reversing the negative trend earlier in the year, and helped by the results of ‘Skyfall’. For the full year, UK was up year on year, but the group overall was down 15%, with particularly weak results in Italy.
  - Gross profit margin(1) was 5% pts worse in the quarter and 1% pt worse in full year, reflecting higher film hire because of the greater mix of blockbuster product, in particular in Q4 2012, where big titles represented a larger proportion of admissions.
  - Operating costs(1) were tightly controlled, particularly staff costs, with LFL indirect costs decreasing by 3% in the year. Excluding the £9.1m one-off rent adjustment, operating costs were close to flat, despite inflation on utilities.

(1) Stated at constant fx rate

Q4 and Full Year 2012 KPIs

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	LIKE-FOR-LIKE		TOTAL ESTATE	
QUARTER 4	**Q4** 2012	**Variance from 2011** +Fav/(Adv)	**Q4** 2012	**Variance from 2011** +Fav/(Adv)
Paid Attendance (m)	25.3	*18%*	26.2	*21%*
Group turnover(1) (£m)	221.9	*18%*	231.7	*21%*
Average Ticket Price(2) £	6.03	*3%*	6.07	*1%*
Retail revenue per Head(2) £	1.93	*1%*	1.94	*0%*

	LIKE-FOR-LIKE		TOTAL ESTATE	
FULL YEAR	**FY** 2012	**Variance from 2011** +Fav/(Adv)	**FY** 2012	**Variance from 2011** +Fav/(Adv)
Paid Attendance (m)	76.4	*(2%)*	82.3	*4%*
Group turnover(1) (£m)	670.5	*(2%)*	723.9	*4%*
Average Ticket Price (2) £	6.03	*1%*	6.02	*(1%)*
Retail revenue per Head (2) £	1.97	*3%*	1.96	*0%*

(1) At constant fx rates.
(2) At constant fx rates and constant territory weighting, for major territories.

Q4 and Full Year 2012 Margins and Costs

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	LIKE-FOR-LIKE ESTATE			TOTAL ESTATE		
QUARTER 4	**Q4** 2011	**Q4** 2012	**Variance from 2011** +Fav/(Adv)	**Q4** 2011	**Q4** 2012	**Variance from 2011** +Fav/(Adv)
Group Revenue[(1)] (£m)	188.1	221.9	*18%*	190.9	231.7	*21%*
Gross Profit[(1)] (£m)	126.6	138.3	*9%*	128.5	144.5	*12%*
Gross Profit Margin [(1)]	67.3%	62.3%		67.3%	62.4%	
Operating Costs[(1)] (£m)	96.0	87.7	*9%*	97.5	90.9	*7%*
EBITDA [(1)] (£m)	30.5	50.6	*66%*	31.0	53.6	*73%*
EBITDA Margin [(1)]	16.2%	22.8%		16.2%	23.1%	
EBITDA [(2)] (£m)	31.6	50.6	*60%*	32.0	53.6	*67%*

	LIKE-FOR-LIKE ESTATE			TOTAL ESTATE		
FULL YEAR	**FY** 2011	**FY** 2012	**Variance from 2011** +Fav/(Adv)	**FY** 2011	**FY** 2012	**Variance from 2011** +Fav/(Adv)
Group Revenue[(1)] (£m)	686.5	670.5	*(2%)*	697.2	723.9	*4%*
Gross Profit[(1)] (£m)	445.3	428.2	*(4%)*	452.5	463.2	*2%*
Gross Profit Margin [(1)]	64.9%	63.9%		64.9%	64.0%	
Operating Costs[(1)] (£m)	356.3	345.9	*3%*	361.9	372.4	*(3%)*
EBITDA [(1)] (£m)	89.0	82.3	*8%*	90.6	90.8	*0%*
EBITDA Margin [(1)]	13.0%	12.3%		13.0%	12.5%	
EBITDA [(2)] (£m)	91.8	82.3	*(10%)*	93.4	90.8	*(3%)*

(1) Variances stated at constant fx rate
(2) Stated at historic fx
(3) EBITDA includes £9.1m credit to rent in 2012 with regard to prior years.

Q4 & Full Year 2012 Abbreviated Cashflow

As at	Q4 2011	Q4 2012	FY 2011	FY 2012
£m				
EBITDA	**32.0**	**53.6**	**93.4**	**90.8**
Working capital	5.8	21.0	(13.0)	12.7
Net capital expenditure	(15.1)	(12.4)	(51.3)	(41.9)
Provisions and one offs	1.0	(5.4)	(13.4)	(15.7)
Finance Costs	(9.8)	(8.8)	(49.4)	(60.0)
Tax	(2.3)	(0.8)	(3.8)	(2.6)
Acquisitions and disposals	(28.7)	(3.3)	(116.2)	(3.6)
Share capital issued			0.1	
Change in Net Debt	**(17.1)**	**43.9**	**(153.6)**	**(20.3)**

- The cash flow on **working capital** was positive £21m in the quarter and £13m for the year, reflecting seasonal stronger year end trading.
- **Capital expenditure** of £12m mainly related to cinema openings and refurbishments. The capex in the full year, which is net of digital refunds, reflected significant investment in development and growth opportunities, as the proceeds of the May 2011 notes issue continued to be applied.
- **Finance Costs** in the quarter were £9m primarily representing one quarter's Euro note coupon. The half-yearly Sterling note interest payments are made in February and August. The full year figure was unusually high in 2012 because of the timing of the first Sterling notes interest payment.
- **Net debt** decreased by £44m in the quarter.

Debt and Leverage

- 2012 was an unusually phased year.
- Q3 had a particularly weak LTM as a result of phasing, which led to higher leverage.
- LTM EBITDA started to recover in Q4 towards previous levels.

	Q1 2012	Q2 2012	Q3 2012	Q4 2013
LTM EBITDA £m	84	86	69	91
Proforma adjustments £m (1)	10	10	7	6
Proforma LTM EBITDA £m	95	96	76	97
Net Debt £m	478	467	491	450
Net Debt / EBITDA	5.0x	4.9x	6.5x	4.6x
Fixed Charge Cover	2.4x	2.5x	2.0x	2.6x

(1) Proforma adjustments in Q4 2012 are £3m Digital costs savings and £3m from New Sites.

Q4 & Full Year 2012 Activity Highlights

- **Development capex projects in 2012 will grow earnings in the future and consolidate our leadership position in Europe.**

- We opened 5 cinemas in Q4 2012: Llanelli and Dorchester in UK, Puerto Venecia and As Cancelas in Spain and Catania in Italy, and we closed 1 site (Area Central, Spain). During the year, we added 8 cinemas to our portfolio, and closed 3, resulting in a net increase of 5.
- 6 cinemas were refurbished during the year, including the launch of the new luxury concept 'The Lounge' in Whiteleys in Q1 and Odeon Leicester Square Mezzanine, which was converted into Odeon Studios in Q4.
- In Q4, 8 auditoria were converted into our big screen / big sound formats: in 2012 in total we added 1 IMAX and 22 iSens to the circuit.
- The roll-out of Costa Coffee shops in UK added 6 new shops in Q4. We also added 2 Farggi shops in Spain.
- New initiatives developed and implemented during the year included Croma pizza restaurants and Danone & Yog yogurt shops.
- We completed the digitalisation of all cinemas in July 2012, achieving digital benefits: 3D established, staff cost savings half way through, DCM screen advertising delivery trial and growing alternative content.
- The trial commenced of a 4D experience (Dbox motion seats) at Liverpool One in July, and second trial opened in mid-November at Metrocentre (Gateshead, UK).
- We launched a VOD platform, in partnership with Canal + Yomvi, in Spain.

  → Both 4D and VOD are in their early stages; their potential and performance will become clearer during 2013.

- Spanish market attendance since the VAT rise in September 2012 has been positively impacted by film slate. We continue to monitor results to assess the VAT impact on the market.
- Prior year acquisitions were fully integrated, which will provide further opportunity for growth in turnover and EBITDA and will strengthen our leadership position in Europe.

2012 and Estimated 2013 Top 20 Title Phasing

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UK Slate

Top 7 films of each year in Red.

	2012 Top 20	2013 Anticipated Top 20
Q1	Woman in Black	Les Miserables IMAX
	The Best Exotic Marigold Hotel	Oz: The Great and Powerful **3D** IMAX
	War Horse	Wreck-It Ralph **3D**
	The Muppets	Life of Pi **3D** IMAX
		The Croods **3D**
Q2	The Hunger Games IMAX	Iron Man 3 **3D** IMAX
	Prometheus **3D** IMAX	Star Trek Into Darkness **3D** IMAX
	The Avengers **3D** IMAX	The Hangover Part III
	Men In Black 3 **3D**	Man of Steel **3D** IMAX
	The Pirates! In An Adventure With Scientists **3D**	Fast and Furious 6 IMAX
	American Pie Reunion	Despicable Me 2 **3D**
Q3	The Dark Knight Rises IMAX	Monsters University **3D**
	Ted	The Smurfs 2 **3D**
	Ice Age: Continental Drift **3D** IMAX	The World's End
	The Amazing Spiderman **3D** IMAX	The Wolverine
	Brave **3D**	The Lone Ranger **3D** IMAX
Q4	Skyfall (Bond 23) IMAX	Hunger Games: Catching Fire IMAX
	The Hobbit: An Unexpected Journey **3D** IMAX	The Hobbit: The Desolation of Smaug **3D** IMAX
	Twilight Saga: Breaking Dawn Part II IMAX	Thor: The Dark World **3D** IMAX
	Madagascar 3 **3D** IMAX	Turbo **3D**
	Taken 2	

Product for 2013 seems to be better balanced across the year

2013-2015 Hollywood Major Film Slate

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Current indications of future film line up – all subject to change, deletions, additions, delays and variance in box office estimates. So, plenty of good film titles on the slate

GBOR Potential in UK £m	2013	2014	2015
£40m + range	The Hobbit (Part 2) Monsters University Les Miserables	The Hobbit (Part 3) Bond 24 The Inbetweeners	Avatar 2 Justice League of America The Avengers 2 Batman Reboot Star Wars Episode 7
£25m + range	Iron Man 3 Hunger Games: Catching Fire Star Trek Into Darkness The Hangover: Part 3 Man of Steel Life of Pi	Dawn of the Planet of the Apes Transformers 4 The Amazing Spider-Man 2 Maleficent The Good Dinosaur The Hunger Games: Mockingjay 1 Wicked Jurassic Park 4 Untitled Minions Project	Inside the Mind (Pixar) The Hunger Games: Mockingjay 2 Paradise (Prometheus 2) Pirates of the Caribbean 5 3D Pixar film
£15m + range	Fast and Furious 6 Wreck-It Ralf The Croods Despicable Me 2 The Smurfs 2 Turbo Thor: The Dark World The Lone Ranger The Wolverine The World's End Oz: The Great and Powerful	Captain America 2 Lego: Piece of Resistance Noah Rio 2 Guardians of the Galaxy Kung Fu Panda 3 How to Train Your Dragon 2 Fifty Shades of Grey Ninja Turtles	Penguins of Madagascar Peanuts Movie Untitled Illumination Animation Tomorrowland The Smurfs 3 Annie Tintin: Red Rackham's Treasure Mission: Impossible 5 Ant-Man

Current trading & Outlook

- The year has started well, particularly in the UK, with strong performances of ‘Life of Pi’, ‘The Hobbit’ and ‘Les Miserables’. The weighted average market box office to 14 March is up 9% vs last year, with 2% market attendance increase [(1)].

- 3D admissions in January and February increased by 27% for the group vs last year, representing 11% of the total attendance vs 9% prior year.

- The film slate for 2013 looks more evenly phased across the year than in 2012. It includes several sequels to established franchises, such as Monsters, The Hunger Games, The Hobbit, Iron Man, The Hangover, Fast and Furious, Despicable Me and The Smurfs, and other highly anticipated films such as Star Trek Into Darkness and Man of Steel.

- 3D slate is expected to be better than in 2012, with 14 films in 3D within the estimated Top 20 of the year 2013, compared to 9 films in 2012.

- No impact on the attendance or on film phasing from major sporting or Jubilee events expected for 2013.

- Our new site development will continue during 2013, with the opening of 5 new cinemas. We also plan to continue with our retail initiatives strategy, to continue to grow our retail per head.

[(1)] Weighted average of all our territories. Q1 YTD until 14 March 2013.

Q&A & AOB

- Any questions?

- Further questions can be addressed below:
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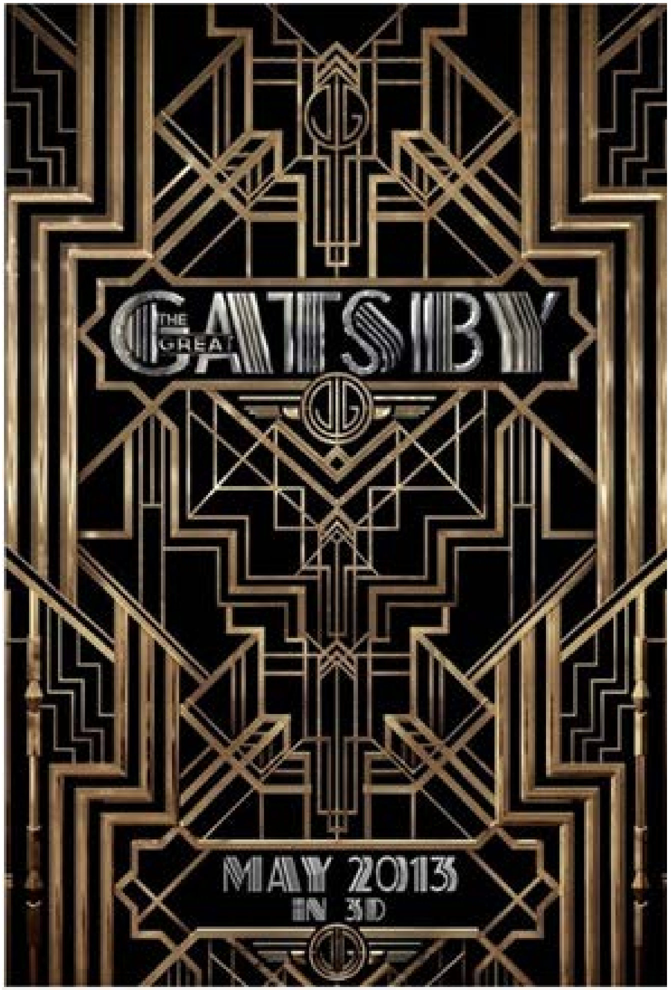
FIGHT. DREAM. HOPE. LOVE.
Les Misérables
THE MUSICAL PHENOMENON
CHRISTMAS DAY


THE GREAT GATSBY
MAY 2013
IN 3D


STAR TREK
INTO DARKNESS
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