Digital Cinema: Rollout, Business Models and Forecasts to 2010
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- Italy
- Belgium
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- Singapore
- China
- Japan
- Norway
- Germany
- Ireland

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- Manufacturing capacity of projector manufacturers
- Format choice
- Interoperability and DCI-compliance
- Post-production to distribution master workflow

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- Business models for international markets
- Dual deployment issues
- Price of equipment

**Logistical**
- Deployment of distribution infrastructure
- Training issues
- Screen bookings and management systems
- Booth size and air-conditioning
- Lack of content

**Third party operators**
- Christie/AIX
- AccessIT
- Technicolor Digital Cinema (TDC)
- National CineMedia (NCM)
- Dolby Digital Cinema
- Kodak Digital Cinema/Barco
- XDC
- Arts Alliance Digital Cinema (AADC)
- Digital Cinema Limited (DCL)
- Unique Digital
- Eclair Digital Cinema
- FHP
- T-Joy
- China Film Group

**Projectors**
- Texas Instruments
- DLP Cinema Technology
- Barco
- Cinemecanica
- Kinoton
- Christie Digital Systems
- NEC Corporation
- LGoS Technology
- Sony Electronics

**Servers**
- Avica Technology Corporation
- EVS Group
- DTS
- GDC Technology
- QuVis
- Dolby
- Doremi
- Kodak
- Qube
- Time Anteaus

**Digital 3D**
- RealD
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3 Digital roll-out business models

During 2005 and 2006, several digital cinema business models came to be offered to the market but it is worth stating that ultimately, the market will decide what the dominant business model will be, and this may well vary by territory or region, depending on the market structure and state of market development. The ones that respond most closely to the various market demands that are appearing from exhibitors will most likely win out. These demands can be summed up as follows:

- **Price** - as low as possible for the equipment
- **Cost** - neutral for the exhibitor
- **Interoperability** - exhibitors want a system that is as universal as 35mm
- **Content** - the promise of quality content via agreements with distributors
- **Upscaleability** - in essence, future proofing, at least for a set period of time
- **Quality** - as good as or better than 35mm

**Third party facilitators**

Many third party facilitators offer the potential for large scale roll out. This is because they are able to raise a large amount of capital, and slowly recoup this investment over time. A summary of the main players, their targets and their business models currently offered on the market can be found on the following page.

In reality, there are only a limited number of payment options for digital cinema deployment.

- **Distributor**
  - Virtual print fee (VPF)
  - Digital distribution charges

- **Exhibitor**
  - Rental of equipment
  - Costs savings passed on to audience
  - Capital Investment
  - Audience premium
  - Additional revenue generation
  - Sponsorship
  - Bulk Purchase

- **Government**

**Distributor**

**Virtual print fee**

A virtual print fee (VPF) or digital distribution charge signals the clear intention of a distributor to help fund the roll out of complete d-cinema systems in that particular market. The VPF is said to be the same market value as that paid for conventional 35mm film prints (in the region of $1,000 to $1,500 per copy), whereby the distributor is still ‘virtually’ paying for the print. So far, only the Studios have signed long term agreements to pay a VPF in the US market.

The industry-coveted VPF does not affect the traditional exhibitor/distributor agreements. The VPF is usually based on long term agreements with Studios or other content providers who will continue to subsidise the equipment over a number of years, typically 10-15 years, whilst also...
providing digital content to put through the system. So far this model has been deployed in US where studio product is dominant. It has also been touted in Ireland, whereby DCL expects the distributor to pay according to their use of the network. However, the commercial phase of this network has yet to take off at time of writing.

At the heart of the virtual print fee model for the roll-out of digital cinema is the middle-man or facilitator between the interested stakeholders. The facilitator acts to bring together the exhibitor, distributor and financial markets, seeking to exploit the potential cost benefits of digital cinema distribution down the line so that exhibitors may re-equip today for a low or no price.

Under the Christie/AIX business plan, exhibitors will be responsible for installation costs, repayable over a ten year period, whilst distributors, including independent operators, will continue to pay a virtual print fee. This is backed up by an $18m private placement on capital markets (with an additional amount being sought in a private placement in March 2006), which is where part of the funding for the roll-out is coming from. Once signed up (as five studios are as 1Q 2006), the distributor will pay a virtual print fee to Christie/AIX for each movie shown. The scheme is funded through the capital markets, with Christie AIX acting as a facilitator between exhibitor, distributor and capital markets. The virtual print fee paid to the facilitator is the basis for capital market interest.

A second driver company using the virtual print fee model is Technicolor Digital Cinema. Under their business model, a studio/distributor will continue to book a film directly with an exhibitor, and the studio/distributor will pay a virtual print fee to Technicolor Digital Cinema (TDC) for using the equipment in cinemas where TDC has deployed digital projectors. There is no stipulation on the technology to be used, with

### Third Party Facilitators Main Proposals (end 2005)

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Source: Screen Digest
Digital Cinema installations worldwide

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<td>Doremi</td>
<td>Jun-05</td>
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<tr>
<td>Sunnyside, WA</td>
<td>Hallett Grand Cinemas</td>
<td>Barco</td>
<td>DP100</td>
<td>Dolby</td>
<td>Nov-05</td>
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<tr>
<td>Meridian, ID</td>
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<td>CP2000</td>
<td>Dolby</td>
<td>May-05</td>
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<td>Peoria, AZ</td>
<td>Harkins Arrowhead Fountains 18</td>
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<td>CP2000</td>
<td>Dolby</td>
<td>Nov-05</td>
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<tr>
<td>New York, NY</td>
<td>Jazz at Lincoln Theatre</td>
<td>Christie</td>
<td>CP2000</td>
<td>NK</td>
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<td>Coon Rapids, MI</td>
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<td>Nov-05</td>
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<td>CP2000</td>
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<td>Rockwood, IL</td>
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<td>New York, NY</td>
<td>Loews 34th St.</td>
<td>Christie</td>
<td>DCP</td>
<td>Avica</td>
<td>May-02</td>
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<td>CP2000</td>
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</table>

Source: Screen Digest
progress. Utopolis has screened six European films digitally out of a total 15 digital titles on its screens. Fifteen (out of 27, therefore over half) US studio titles that were released digitally in USA did not receive a further digital release in the world, which does suggest that titles may be being held back to a certain degree.

German distributor Senator Film has recently announced its intention to launch digital copies of all its films for purpose of screening them at digitally equipped cinemas. Senator is the first German film distributor to offer all its future slate as digital cinema versions. The company is working with pan-European d-cinema initiative XDC, who is responsible for the production, coding, and duplication of the copies.

In Central and Eastern Europe the lack of studio d-film releases has also been compounded by the general release lag of Hollywood titles (which can be up to six months) as well as the fact that only around 80 per cent of US movies actually reach multiplexes in the region.

In Sweden, the e-cinema circuit run by FHP (62 screens) has regular digital screenings of local first-run films. There were 15 digital films released in Sweden in 2005, all on e-cinema quality projection systems. However, FHP tends not to distinguish between d and e-cinema standards, and if the circuit does not want to screen Hollywood films, and if other distributors have no problem, then e-cinema is a viable option.

Outside of Europe, Brazil is an active digital cinema territory, again at e-cinema level, through the Rain Network circuit. The circuit is used for advertising and screening local movies, which have proved successful.

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**Widest global digital releases in 2005**

<table>
<thead>
<tr>
<th>Distributor</th>
<th>Territories</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Star Wars: Episode 3</td>
<td>20th Century Fox</td>
</tr>
<tr>
<td>2 Harry Potter and the Goblet of Fire</td>
<td>Warner Bros</td>
</tr>
<tr>
<td>3 The Island</td>
<td>Warner Bros</td>
</tr>
<tr>
<td>4 Chicken Little</td>
<td>Buena Vista</td>
</tr>
<tr>
<td>5 Chronicles of Narnia</td>
<td>Buena Vista</td>
</tr>
<tr>
<td>6 Constantine</td>
<td>Warner Bros</td>
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<tr>
<td>7 Corpse Bride</td>
<td>Warner Bros</td>
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<tr>
<td>8 The March of the Penguins</td>
<td>Buena Vista</td>
</tr>
<tr>
<td>9 Sin City</td>
<td>Miramax</td>
</tr>
<tr>
<td>10 Flight Plan</td>
<td>Buena Vista</td>
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</tbody>
</table>

Source: Screen Digest

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**Widest global digital releases in 2005**

![Graph of widest global digital releases in 2005](source: Screen Digest)