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Digitization of cinemas in Europe

by Elisabetta Brunella
Secretary General of MEDIA Salles

1st Meeting of the group of cinema experts in the partnership countries of Euromed Audiovisual III Programme of the European Union

Casablanca, 20 - 21 June 2013

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founded in 1991
operating within the framework of the
MEDIA Programme
with the support of the Italian Government

Members of MEDIA Salles:

national and international
Cinema Exhibitors'
Associations
from all over Europe

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Operating in 3 main areas:

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TRAINING

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TRAINING

In 2002 MEDIA Salles created
the first training course for cinema exhibitors
supported by the MEDIA Programme

Since 2002 MEDIA Salles has been organizing annually
training courses for European cinema professionals

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RESEARCH AND INFORMATION

Main publication:
The European Cinema Yearbook
(http://www.mediasalles.it/yearbook.htm)

Published for the first time in 1992
A detailed survey carried out annually on the European cinema exhibition sector

-36 European countries
- over 40 statistical indicators

available in Italian, French, English and Spanish
at MEDIA Salles' website: www.mediasalles.it

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TRAINING

DigiTraining Plus: New Technologies for the European Cinemas of the Future

Born in 2004
The only training course within the MEDIA Programme dealing with digital technologies from the point of view of cinemas

In 2013 the tenth edition:

CRACOW AND WARSAW, 28 AUGUST – 1 SEPTEMBER 2013

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European Cinema Yearbook

http://www.mediasalles.it/yearbook.htm

Since 2003: a specific section on digital cinema

Digital Cinemas: Focus on Europe

LATEST UPDATE: data as at 1st January 2012

Number of digital sites and screens by country, from 1st January 2004 to 1st January 2012

Number of digital and 3D sites and screens by country as at 1st January 2012 (overview)

Digital screens by country as at 1st January 2012 (detailed list)

Data as at 30 June 2011

"A pan-European snapshot" by Tero Koistinen, Director General, Finnish Chamber of Films

Number of digital sites and screens by country, from 30 June 2004 to 30 June

Number of digital sites and screens by country

(equipped with DLP Cinema™ and SXRD projectors)

print

Country	1st January 2004		1st January 2005		1st January 2006		1st January 2007		1st January 2008		1st January 2009		1st January 2010		1st January 2011		1st January 2012	
	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens	Total no of cinemas	Total no of screens
A	1	1	1	1	11	16	11	18	17	35	26	84	57	239	71	306	80	393
AD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	2	1	3
B	8	10	10	14	14	20	16	35	16	76	17	98	27	144	47	331	67	428
BG	-	-	-	-	-	-	2	4	2	4	8	17	12	23	17	57	17	77
CH	-	-	-	-	12	12	13	14	13	16	19	28	43	60	91	139	151	315
CY	-	-	-	-	-	-	-	-	-	-	-	-	6	6	6	15	6	18
CZ	1	1	1	1	1	1	1	1	1	1	2	2	42	50	94	133	131	299
D	2	2	2	2	21	31	48	96	72	151	71	162	317	566	560	1 238	678	2 011
DK	-	-	4	4	4	5	4	5	4	6	8	10	22	25	78	137	134	286
E	2	2	1	1	7	7	17	21	21	33	29	50	177	252	291	770	339	1 545
EE	-	-	-	-	-	-	-	-	-	-	1	2	2	5	3	13	5	18
F	3	3	6	6	20	21	27	34	44	66	72	253	257	904	532	1 885	997	3 649
FIN	-	-	-	-	-	-	1	1	1	1	8	12	35	48	56	86	94	180
GR	-	-	-	-	-	-	-	-	2	2	8	8	22	31	39	59	48	75
HR	-	-	-	-	-	-	-	-	-	-	6	7	7	8	7	9	12	90
HU	1	1	1	1	1	1	1	1	2	2	4	7	17	31	26	56	37	159
I	1	1	3	4	12	25	17	31	21	38	46	80	290	434	474	912	570	1 519
IRL	-	-	-	-	1	1	12	23	12	36	9	38	45	112	53	142	51	192
IS	-	-	-	-	-	-	1	3	2	3	4	7	4	7	7	14	8	28
L	-	-	1	3	1	3	2	13	2	13	4	21	5	22	5	24	13	33
LT	-	-	-	-	-	-	-	-	-	-	-	-	4	5	7	13	8	18

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DGT Online Informer

http://www.mediasalles.it/dgt_online/index.htm

Since 2006

Online newsletter for cinema professionals hosting news and information on digital technology in Europe and worldwide

DGT

What is the "DGT online informer"?

DGT Online Informer No. 91 - 10 May 2013 -
DGT Online Informer No. 90 - 9 February 2013 -
DGT Online Informer No. 89 - 24 December 2012 -
DGT Online Informer No. 88 - 9 November 2012 -
DGT Online Informer No. 87 - 1 September 2012 - (versione italiana)
DGT Online Informer No. 86 - 31 August 2012 - (versione italiana)
DGT Online Informer No. 85 - 30 August 2012 - (versione italiana)
DGT Online Informer No. 84 - 29 August 2012 - (versione italiana)
DGT Online Informer No. 83 - 28 August 2012 - (versione italiana)
DGT Online Informer No. 82 - 22 June 2012 -

All different, all digital
by Elisabetta Galeffi

This column hosts portraits of cinemas in Europe and the rest of the world which are quite different from one another but have in common the fact that they have all adopted digital projection.

Country	Site	Town	Company	Number of digital projectors	Projector	Resolution	Server	No. of 3D screens
Denmark	Grand Teatret	Copenhagen	Grand	6	Barco	2K	Dolby	-

Grand Teatret, Copenhagen

It is 4 January, 7.30 p.m.: the first screening of the evening at Copenhagen's Cinema Grand. Winter, and it's been as black as night for at least three hours. The most popular means of transport for getting to the 'Grand Teatret' is the bicycle.

The difference in the evening is that in the dark cyclists wear a helmet fitted with a light. Like miners, for example. At seven thirty, the bike stands in front of the Grand are "overbooked and a quiet, orderly queue, helmets in hand, is waiting to buy tickets for one of the 6 auditoriums in the historical theatre. Founded in 1913, the Grand is on" e of the oldest cinemas in the Danish capital: impossible to remain indifferent to the fascination of this Art Nouveau style building right in the city centre. Mikkel Bryggers Gade 8, a stone's throw away from Tivoli, the popular amusement park, and the Town Hall. A few hours at the Grand or stopping off at the theatre's café for a magic moment surrounded by the beautiful posters of former days that cover the walls is much more than just a way of warming up and recovering from Denmark's icy winter winds.

Thank goodness in Denmark films are screened in their original language with subtitles: it wasn't difficult to find one that we could follow in German. There would have been fewer problems with English but "Barbara", an art-house film, whilst having won an award at the 2012 Berlinale, would have been more difficult to find anywhere else and seemed even more tempting than "Jack Reacher" with Tom Cruise.

Another virtue of the Grand Teatret is that its 6 auditoriums screen up to nine films of all types. The secret is to juggle the screening times: the first is at 11.30 a.m. and the last at 9.30 p.m.

Grand Teatret is thus marked by close attention to programming which, moreover, despite a century of history, is perfectly "modern", having become 100% digital in 2012.

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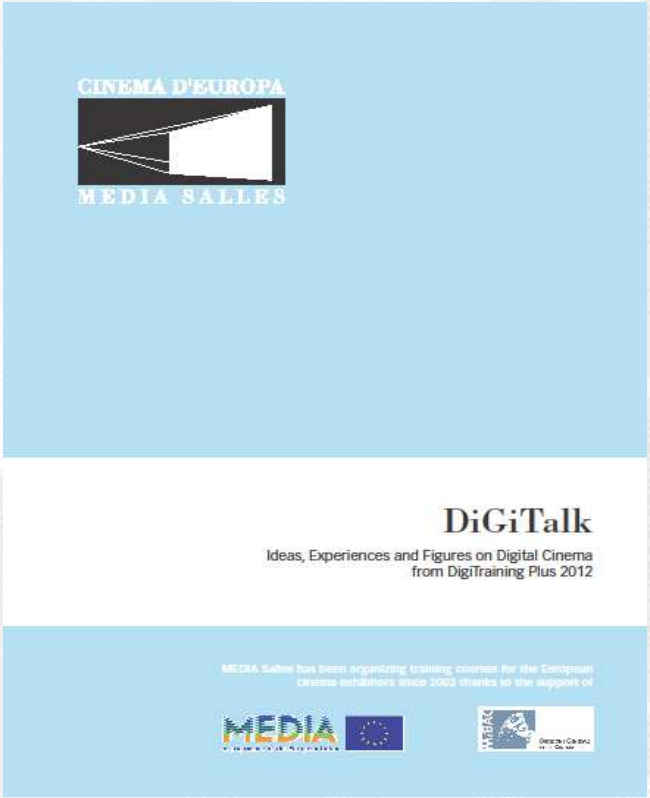

DiGiTalk

Since 2010 – now at its 3rd edition

An easy-to-consult booklet summarizing ideas, experiences and figures from the DigiTraining Plus courses

It includes a rich section of tables and graphs on digital cinema in Europe and worldwide

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European Cinema Journal

http://www.mediasalles.it/ecjourn.htm

Since 1999

Newsletter issued on the occasion of the promotional events organized by MEDIA Salles

European Cinema JOURNAL MEDIA SALLES

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The European Digital Cinema Report

MEDIA Salles – European Audiovisual Observatory

The first in-depht analysis of the digital roll-out in Europe.

Published in December 2011

(http://www.obs.coe.int/oea_publ/market/european_digital_cinema.html)

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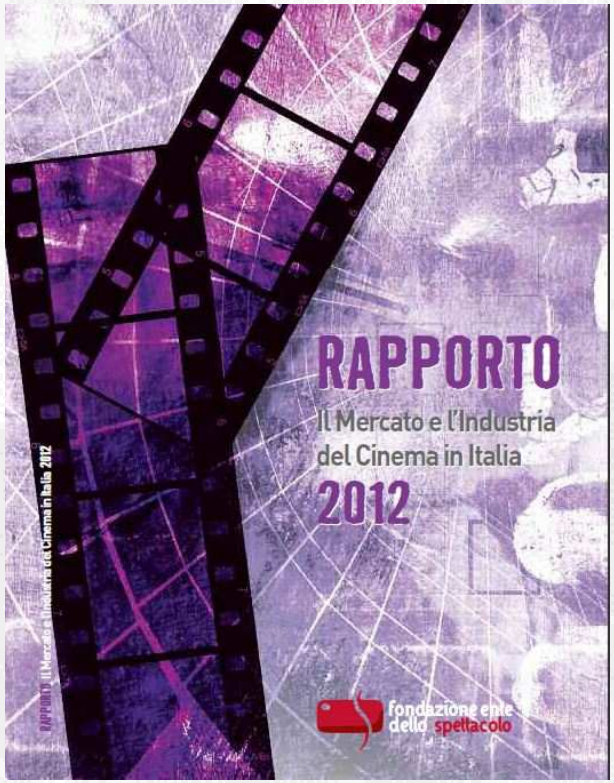

Contribution to various publications and

collaboration to international events and workshops

dealing with digital cinema

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The digital roll-out in Europe

75% of the world's screens are now digital

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The digital roll-out

as at 1st January 2013

90,142 **digital screens worldwide**

36,286 **in North America**

25,085 **in Europe**

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The digital roll-out as at 1st January 2013

Focus on Europe

70% of European screens are now digital

but the European average conceals great differences

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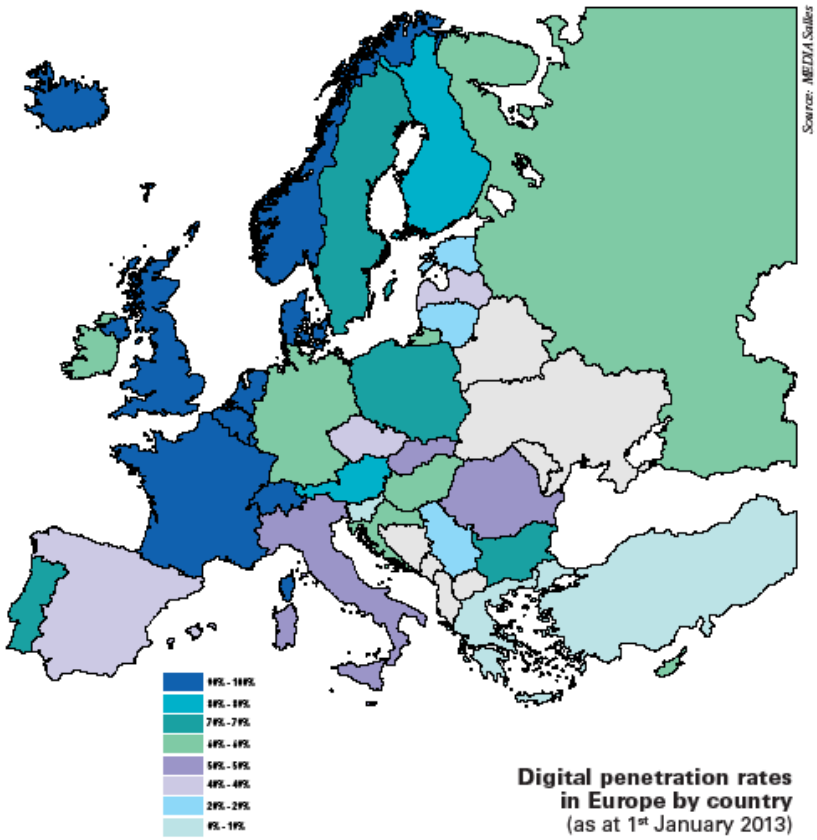

Digital penetration rates in Europe by country
(as at 1st January 2013)

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Focus on Europe

The 6 leading markets

Country	Digital screens as at 01.01.13	Digital penetration rates
France	5,150	94%
United Kingdom	3,544	94%
Germany	3,134	68%
Russia	2,100	67%
Italy	2,112	55%
Spain	1,800	45%

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Penetration rates of digital screens in Europe

Very high in some countries

Country	Digital screens as at 01.01.13	Digital penetration rates
Luxembourg	33	100%
Norway	415	100%
The Netherlands	808	100%

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Penetration rates of digital screens in Europe

Very low in some countries

Country	Digital screens as at 01.01.13	Digital penetration rates
Lithuania	21	25%
Serbia	29	24%
Greece	81	17%

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Main factors of the roll-out:

2009 – 2010: digitization is mainly driven by 3D installations

2011 – 2012:
3D is no more the key factor for the increase of digital screens

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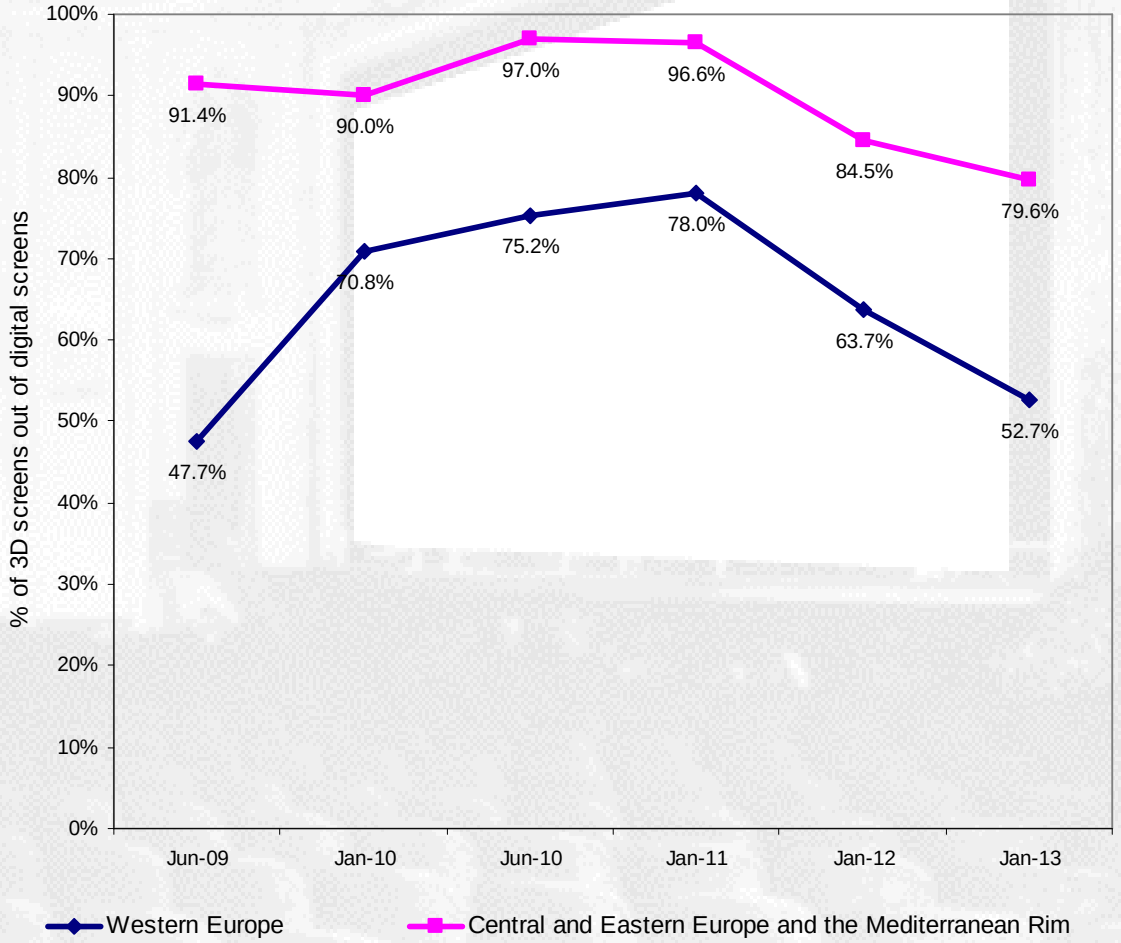
Percentage of 3D screens out of total digital screens



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Digitization is now mainly driven by

2D installations

3D penetration will settle at around 50% when digitization reaches completion

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Another key factor (since 2011):

Availability of support schemes

at international, national and local level

Mainly addressing cinemas with a cultural and social role

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Methodology

SOURCES

- National Film Institutes
- National statistical organizations
- Cinema Exhibitors' Associations

- Cinema exhibition companies
- Suppliers of digital and 3D technology
- Suppliers of services (satellite connections)
- Suppliers of alternative content
- Third party integrators managing VPF agreements

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Methodology
THE DATABASE OF DIGITAL CINEMAS

Information collected

For each cinema:

Company
Site
Town
Country
Continent
Total number of screens
Total number of 35mm projectors
Total number of digital projectors
Total number of 3D screens
Satellite connection (yes/no)
Name of the satellite operator
Decoder brand
DCP delivery method

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THE DATABASE OF DIGITAL CINEMAS

Information collected

For each digital screen:

Digital projector technology
Digital projector resolution
Digital projector brand
Date of installation
Date of replacement of the digital projector (if the projector has been replaced)
Server
Supplier of 3D technology (if any)
Integrator (if any)

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Notes and definition of terms used

Digital screen: a screen equipped with a DLP Cinema™ or a SXRD™ projector
Digital site/cinema: a cinema with at least one digital screen

Note:
The lists of digital cinemas in the European countries, published in the European Cinema Yearbook, were originally “per cinema”. Since 2012, “per screen” lists are available for some countries, with a much higher degree of detail.

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Methodology

The objectives at the basis of the research

- To offer reliable information
- To indicate developments in technology adoption

- To answer the questions:

Which are the main players in digital cinema?
Where are digital screens located?
What types of cinemas have converted to the new technologies and which, instead, yet have to digitize?
What are the advantages for spectators?
What are the future prospects in the view of exhibitors?

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Methodology

The ultimate aim

To help European cinemas to become more competitive

To help European institutions to adopt effective and targeted policies
to allow the digitization of all screens

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Thank you for your attention

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www.mediasalles.it

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