Article title: ‘Coming to a cinema near you?’: digitized exhibition and independent cinemas in Australia

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Abstract:

Australia is on the path to a full-scale conversion to digital cinema exhibition probably within the next five to ten years. Despite early optimism that digitization could provide a catalyst for greater democratization of the Australian exhibition market, by creating more opportunities for audiences to see independent and alternate films, this outcome now appears far from certain. The launch and ongoing roll-out of the international standard for digital exhibition, which is now firmly controlled by the major American studios, is intensifying, rather than diminishing, the market dominance of these media conglomerates and their local allies, the major Australian exhibition chains. Independent film exhibition and alternative presentation formats, on the other hand, are being pushed even further to the periphery by these increasingly centralized market forces. While independent and major exhibitors have historically coexisted, albeit at times in a somewhat uneasy relationship, the financial imperatives of digital cinema now threaten to drive many independent cinemas to the edge, and with it the ongoing diversity of cinema culture in Australia. Of particular concern is the fate of independent theatres in regional and rural locations where many of these cinemas provide the only public screening opportunities within large geographic areas.

This article outlines digital developments in Australia’s commercial cinema industry within a national and international context, and in doing so, considers the impact of digital exhibition technologies on Australia’s independent cinema sector.

Keywords: Digital cinema; DCI Specification; 3D; Independent cinemas; Australian cinema; Cinema audiences

This article examines Australia's progress towards full-scale conversion to digitized cinema exhibition and explores the impact of this innovation on independent cinemas. In doing so, it also examines the important contribution that independents make to the cultural landscape at a local, national and international level. The move towards the digitization of cinema exhibition has been widely promoted as an innovation full of promise and potential for both the screen industry and audiences. Advocates contend that due to its relatively low cost, digital technologies will encourage and facilitate the production and screening of more independent, niche and alternate films. However, industrial innovations are rarely, if ever, implemented in a vacuum. They are inevitably almost always controlled by corporations and other organizations with vested interests in directing their implementation in order to maintain and/or enhance market share or power, or both. This is certainly the case with the international roll-out of digital cinema exhibition, which, following a brief period of experimentation and some market liberalization, is now under the firm control of the major American studios. This has implications not just for technical standards but also for how independent cinemas, who lack the box office clout and hence negotiating power of chain-owned multiplexes, are able to operate (or not) in this digitized environment.

This article critically examines some of the claims made in relation to digital cinema and addresses some key questions. Will the conversion actually broaden the range of films available at Australian cinemas? And what impact will digital exhibition have on cinematic culture and experience? The first section of this article sets some definitional parameters for the discussion and outlines the international context for the development and implementation of digital cinema as well as the specifics of the Australian experience. The article goes on to examine the role of independent cinemas in Australia and the significance of urban and rural inequalities. It concludes by arguing for the importance of the continued inclusion of independent cinema in the cultural landscape and continued access to cinema, whatever the format, in rural Australia.

Digital cinema and exhibition

The term 'digital cinema exhibition', as used in this article, refers to the process of projecting audiovisual content in cinemas using data files rather than traditional 35mm film. There are a variety of formats for digital projection and these are often distinguished from one another by their screen

resolution. Early commercial systems generally operated with resolutions of 1.3K or 1.4K, sometimes lower, and are often referred to as 'electronic cinema' or 'e-cinema' (Inglis 2008: 13). The 1.3K resolution equates to 1300 pixels across the horizontal frame, 1.4K to 1400 pixels and so on, with higher resolutions generally equating to a high quality image (Watson 2007:2). While the 1.3K format is considered capable of matching 35mm in terms of quality, these systems are highly problematic for the major American studios because they play unencrypted digital files that can be illegally duplicated relatively easily (Wessel 2007: 106, Inglis 2008: 13, Lake 28 October 2008 interview). As a consequence, the studios have not allowed widespread distribution of their films in the e-cinema format.

Digital cinema is, nevertheless, a highly attractive proposition for the studios because of its potential to significantly reduce the cost of film distribution. The major American studios reportedly spend around US\$1 billion annually on 35mm film prints worldwide (Culkin and Randle 2003: 88) but digital 'prints' can be produced for significantly less. In Australia, DCI Specification digital prints can be made for less than a fifth of the cost of a traditional 35mm version (Lake 28 October 2008 interview). The scale of the potential cost savings underlines the persuasive economic argument for the conversion to digital cinema - the hurdle for the major American studios was to find a solution to the security issues.

The majors (Disney, Fox, Paramount, Sony, Universal and Warner Bros.) formed a partnership to develop a new digital cinema format and their 'Digital Cinema Initiatives (DCI) Specification' was launched in 2005. The DCI standard satisfied the studios' requirements for protection against piracy with a range of in-built security specifications including dual encryption of digital film prints and digital projectors, designed specifically to prevent direct copying of files at cinemas. The DCI Specification also established the 2K resolution as the minimum projection standard for studio films and comprises a range of other detailed technical requirements including prescribed formats for file compression (Digital Cinema Initiatives 2009a, 2009b). As well as successfully addressing some practical concerns about digital cinema, this proprietary format also effectively re-asserted the studios' dominance and control over the evolving digital landscape by excluding alternate and lower cost digital cinema formats, such as e-cinema, from playing their films.

With the DCI Specification in place, the major American studios are poised to capitalize on the economic benefits of digital cinema but exhibitors, who will be required to install the hardware to facilitate the conversion, are less enthusiastic. The lack of enthusiasm is attributable in part to the absence of novelty when comparing standard 2D format digital with earlier cinematic innovations such as the coming sound in the 1920s or the use of the colour image after the 1950s, which both contributed to significant increases in cinema attendance (Gomery 1992: 219-221; 237). With many present day cinema-goers reportedly having difficulty distinguishing between images projected digitally from those on 35mm, digital cinema is not a revolution for audiences. Consequently exhibitors have remained unconvinced of the potential of 2D digital cinema to dramatically increase attendance and revenues (Belton 2002: 104, Wessell 2007: 106, Inglis 2008: 13). In order to provide incentives for exhibitors, the studios have proposed a scheme known as the Virtual Print Fee, which offers to compensate cinemas for the high cost of acquiring the digital cinema projection hardware. Under this scheme, the studios pay a fee to the exhibitor (or third party hardware provider) each time a first release print is shipped to their cinema. To be paid over a period of around seven to ten years, the Virtual Print Fee, as currently proposed, is intended to cover approximately 65 per cent to 80 per cent of the cost of the digital cinema equipment (Inglis 2008: 19-21; Smith 2009).

The terms of Australian Virtual Print Fee negotiations are confidential but unofficial industry responses signal major concerns about the impact of restricting the offer of subsidy to cinemas with at least three or four screens. If this is implemented, the outlook for independent cinemas is bleak. Half Australia's 491 cinema theatres are either single or twin screen and of these 70 per cent (173) are in regional and rural areas. The vast majority are independent with only seven single or twin screen cinemas in Australia owned by major chains (MPDAA 2009), and therefore likely to be rolled into larger Virtual Print Fee deals. For cinemas not offered the Virtual Print Fee the burden of self-financing the conversion is likely to be substantial with a standard 2D DCI digital cinema system currently costing in excess of \$80,000 (Roggenkamp 6 October 2009 interview). Meeting this cost may prove fiscally impossible for some cinemas, particularly those in regional and rural areas where businesses are smaller, and turnover and profitability tends to be much lower. Cinemas unable to make the conversion to DCI digital are likely to face an uncertain future with increased competition for a dwindling supply of 35mm prints. Then once the conversion is complete, the inability to screen any new studio films,

which many independents rely on for a substantial portion of their income (Screen Australia 2009a, Lake 28 October 2008 interview).

While negotiations for Australian Virtual Print Fee deals are continuing (Smith 2009), the intensity of the debate around the subsidy has been somewhat overshadowed by the recent boom in installations of DCI standard digital 3D. Significantly, the conversion of screens to digital 3D is being funded directly by exhibitors rather than under the studio-controlled Virtual Print Fee scheme. With the steady supply of new-generation stereoscopic films and demonstrated box office superiority in comparison with 2D, there are strong economic incentives for exhibitors to self-fund the transition to this particular digital format (Hancock and Jones 2009: 109; Jones 2009: 103). With many digital 3D systems also capable of screening in 2D, the current momentum in the former may encourage the major American studios to adopt a more cautious ‘wait and see’ approach to future Virtual Print Fee deals until it becomes clearer how much of the conversion exhibitors might be willing to pay for without the subsidy. However, the studios may have stronger incentives for promoting an expeditious mass transition to digital cinema. The economic benefits of the conversion will not begin to be fully realized until the number of digital screens worldwide is sufficient to allow the production of 35mm release prints to be substantially reduced and later eventually phased out.

The economic imperatives of the digital cinema exhibition proposition are clear. The major American studios are highly motivated to realize the considerable savings that digital cinema offers by reducing the cost of distribution as well as providing a platform for innovations such as the re-launch of 3D. Earlier scholarship concerned with digital exhibition has tended to represent the transition as a largely unproblematic and globally standardized proposition where existing cinematic power structures and markets would remain relatively unaltered, and where the technical presentation of films and the experience of cinema going for audiences are also not fundamentally changed (Belton 2002, Culkin and Randle 2003). However, the limitation of such a position lies in its failure to consider the role of the national and the local in mediating and shaping global phenomena. One exception in this regard has been Stuart Hanson’s work on digital cinema and specialized film exhibition in the United Kingdom (Hanson 2007). As Ward and Moran argue, engaging with the specificities of place does not diminish the significance of global discourses. Rather it allows researchers to become attuned to how globalizing influences intermesh with nations and localities to contribute to particular circumstances and outcomes

(Ward and Moran 2007: 83-84). A critical examination of digital cinema in Australia that looks beyond the studios and multiplexes, opens scholarly discourse to an examination of how this transition is occurring outside the mainstream. More specifically, it provides an approach for interrogating the uneven and, at times disadvantageous development, of digital exhibition for independent cinemas and their audiences.

Australia – the current situation

Digital cinema in Australia has been deployed effectively at both ends of the technology spectrum. There have been widespread installations of e-cinema systems, largely by independent exhibitors who use them for advertising as well as for screening independently distributed films available in this format. More recently, there has been rapid growth in the number of DCI digital 3D screens, predominantly in cinemas owned by the major exhibition chains.

There are no comprehensive figures for the number of e-cinema systems in Australia but estimates suggest their use has been significant, particularly in the independent sector. In 2007 it was claimed over 250 cinemas in Australia were equipped with e-cinema, ranging from resolutions of 1K to 1.4K (Watson 2007: 5). In early 2009, Peter Castaldi, an independent distributor who at that time used the e-cinema network, estimated that around half of Australia's 609 independent cinema screens had e-cinema capabilities (Castaldi 22 January 2009 interview). Commercial screenings of films in e-cinema format began in Australia in 2005 and since then around 40 to 50 independent local and international films have been exhibited in this format (Parkes 26 April 2009 interview). However, the rollout of new e-cinema systems has slowed considerably as cinemas ponder the implications of the DCI Specification and await the outcome of Virtual Print Fee negotiations. Due to concerns about illegal copying, it is clear the major American studios will allow their films to be screened *only* on DCI compliant systems (Digital Cinema Initiatives 2009b). With mainstream American films crucial to the economic viability of most cinemas (Screen Australia 2009a), exhibitors currently using e-cinema are facing the inevitability of converting to DCI digital cinema in the near future.

Numbers of DCI Specification systems are tracked by the Motion Picture Distributors Association of Australia (MPDAA). According to their data, the number of digital screens in Australia more than

tripled in 2009, with 3D accounting for the vast majority of new installations. By December there were 171 digital screens, representing eight per cent of the national total (MPDAA 2009, Screen Australia 2009b). New-generation 3D is infinitely superior to the 3D releases of the 1970s and 1980s (Maddox 2009: 6) and unlike earlier revivals of 3D (Gomery 1992: 240-241), the films are also proving to be highly lucrative at the box office. In the United States, 3D versions are generating on average three times the revenues of the same film on 2D screens (Jones 2009: 103) and there have been anecdotal reports of similar successes in Australia with major releases such as *Ice Age: Dawn of the Dinosaurs* (Saldanha and Thurmeier 2009), *Monsters vs Aliens* (Letterman and Vernon 2009) and *Up* (Docter and Peterson 2009). The major American studios have been investing heavily in 3D production, with releases now exceeding more than one per month. Senior DreamWorks Animation executive, Jeffrey Katzenberg, recently predicted that within the next five to seven years all films from the studios would be released in digital 3D (Frater 2008).

Large chain cinemas, such as Greater Union, Hoyts and Village, have accounted for the majority of digital 3D installations, but independents in both metropolitan and some larger regional areas have also been converting screens to 3D (MPDAA 2009). For exhibitors the cost of digital 3D, currently around 50 per cent more than a standard 2D DCI system, has been offset by substantial increases in box office revenues (Wilson 2009). However, while digital 3D is proving to be a potentially self-sustaining model for digital conversions in larger population centres, it is not viable for many smaller cinemas because their audiences are not large enough to generate sufficient revenue to support the capital outlay for the 3D equipment.

The Place of Independent Cinemas

In metropolitan locations, independents offer an alternative to the relatively homogeneous experience that characterizes cinema going at large multiplexes owned by major exhibitors. Independents, such as the Nova in Melbourne and the Hayden Orpheum and the Chauvel Cinema in Sydney, offer audiences a differentiated cinema aesthetic. The styling and interiors of independent cinemas often represents a less modern contrast to the sleek, standardized design of present day multiplexes. Independents also tend to screen a more diverse program of specialized films including foreign language and documentaries as well as selected mainstream titles. For many cinemas, this point of differentiation is

crucial to their economic survival because they are simply unable to compete directly with the multiplexes in terms of the technical quality of their film presentation and limited access to new film releases. From an audience perspective, these differences give rise to variety and choice.

Metropolitan independents cater for film audiences actively seeking alternate content and cinema going environments (Wilinsky 2001: 3). The significance of this alternate cinema culture is often articulated by audiences through reference to its differentiation from the multiplex culture and the interdependency of these differing film cultures provides important relational boundaries through which meanings are articulated. As Bourdieu observed cultures ‘only exist through each other and it is the relation, or rather, the objective collaboration of respective production apparatuses and clients which produces the value of culture and the need to possess it’ (Bourdieu 1984: 250). As Janna Jones observed at the Tampa Theater, an independent arthouse cinema in Florida, United States, the significance of the cinema for its audience was based on perceptions of the Tampa as a ‘place of *distinction*’ (italics original text) and of themselves as part of ‘community of discriminating patrons’ whose filmic tastes were expressed principally by reference to their dislike for multiplexes and blockbuster films (Jones 2001: 124). Similar attitudes are observable among audiences at Australian independent cinemas. Interviews with patrons of the independent Electric Shadows Cinema, in Australia’s capital city of Canberra which closed in 2006, emphasize the importance of distinctions between their cinema and the multiplex culture:

You went [to Electric Shadows] to enjoy a movie but you went to enjoy the social surrounding of it as well. It’s quite different to a cineplex which is like a film supermarket – it [Electric Shadows] has an entirely different feel.

Electric Shadows Cinema Patron (*Electric Shadows: The Story of a Cinema*, Scarano 2009)

Electric Shadows brought us films that we hold dear, films that commercial cinemas would not touch but which Electric Shadows brought to our city which is just fantastic.

Electric Shadows Cinema Patron (*Electric Shadows: The Story of a Cinema*, Scarano 2009)

In regional and rural areas, independents regularly provide the only cinema going opportunities for local residents and operate in a wide variety of smaller towns where populations are not sufficient to

support large multi-screen complexes. As a result, most screen a program that is skewed towards mainstream American films but these cinemas are also demonstrated to be receptive and adaptive to the interests of local community sub-groups. For example, the Picture Show Man Cinema in Merimbula on the far south coast of New South Wales, programs at least one film per week for the large local retiree population (Parkes 26 April 2009 interview). The First Avenue Cinema at Sawtell, also in regional New South Wales, regularly screens documentaries that highlight environmental or social issues such as *The Inconvenient Truth* (Guggenheim 2006), *Garbage Warrior* (Hodge 2007) and *Fahrenheit 9/11* (Moore 2004), which appeal to the substantial green and/or alternate lifestyle demographic in the local area (Brissett 31 July 2009 interview).

Gregory Waller has argued that cinemas in small towns are often deeply embedded in sense of community and the social and cultural life of the town (Waller 2005: 15). Although Waller made these claims in relation to cinema in the United States in the 1930s and 1940s, my own detailed research, undertaken among regional and rural cinema audiences in Australia over the past twelve months, suggests this continues to have resonance today. In both written surveys and in face to face interviews, cinema goers across numerous sites have regularly and at times forcefully expressed opinions about the importance of their local cinema as both a commercial and social institution within the town through descriptions of local cinemas as a 'valuable community resource', 'an important venue for social outings' and 'a great local business'. Audience comments also suggest regional and rural cinemas are perceived to be *part* of their community. Despite the fact these cinemas screen films that rarely have any direct connection to the local area, they are nevertheless perceived as venues offering 'local entertainment'.

Independent cinemas in both metropolitan and regional and rural areas have an important role in facilitating different types of social and cinema going practices (Harbord 2002: 45), without which the multiplex would effectively monopolize the options and thereby alter the meanings and experience of film consumption in Australia. In metropolitan locations independent cinemas enable diversity, while in regional and rural locations they often have the added role of bringing public cinema exhibition in any form to their local area. Independents support the screening of limited release films, which with fewer release prints and specialized audience appeal, often find it difficult to find screens in multiplexes, and would otherwise be available only on DVD or television. Additionally, as Janet

Harbord suggests, it is the *site* of film consumption as well as the screen content that is important to the social value and meanings of cinematic culture (Harbord 2002: 39). This assertion is clearly supported by comments from film audiences as outlined earlier in this section, which demonstrate the relevance of the physical and cultural location of independent cinemas.

The ‘promise’ of digital cinema

The potential for the low cost and high accessibility of digital technologies to liberalize cinema production and distribution has been advocated by various scholars including Jenkins (2006) and Willis (2005). While the Internet is often seen as the ultimate democratic platform connecting free-thinking audiences with new forms of digitally-produced content, it is similarly claimed that digital exhibition will also broaden the range of films available at cinemas. The contention is, due to the relatively low cost of digital prints, it will be feasible to screen more independent and specialized films in cinemas (Hanson 2007: 373). It has also been argued that the lower costs of digital exhibition will improve the cinema experience for people living in regional and rural areas, where the practical problems associated with the use of 35mm currently limit screening opportunities (Gadd 2005: 60; Watson 2007: 5-6).

Historically, the cost of releasing films at cinemas in 35mm format has certainly been *one* barrier to entry for many specialized, niche and/or experimental filmmakers and independent distributors. The development of the optimism around the potential for digital cinema to increase diversity and accessibility can be understood through an examination of the use of e-cinema in Australia by the independent sector in recent years. The low cost of e-cinema created opportunities for independent distributors to extend the scope of certain theatrical releases to more effectively capitalize on audience demand. In 2006 the Australian feature *Kenny* (Jacobson 2006) opened on 77 screens (Ziffer 2006), a large release for a locally made and independently released film. The breadth of the release was achieved within the distributor’s limited financial resources only through the use of both 35mm and e-cinema digital prints. The film went on to become the second highest grossing Australian film in 2006 (Australian Film Commission 2007). E-cinema has also facilitated the entry of a number of new independent distributors into the Australian market, such as the Australian Film Syndicate and Titan View, who have utilized the format to release specialized and niche films as well as more mainstream titles (Lister 2009, Simpson 2009). Films distributed by Titan View include *The Jammed* (McLachlan

2007) and *Men's Group* (Joy 2008), the latter winning the Inside Film Awards for Best Film, Best Script and Best Actor in 2008 (Titan View 2009). However, with the e-cinema network likely to be phased out by the implementation of DCI Specification digital cinema, examples of these kinds of boundary testing innovations within the independent sector may be short lived.

The cost of the release format, however, is not the *only* barrier for specialized films seeking cinema release in Australia. Major exhibitors program films based on their ability to maximize attendance and profitability and in Australia this means screening mostly mainstream American films, which account for the vast majority of box office revenues (Screen Australia 2009a). The majors have large numbers of screens to program and hence maintain close relationships with the studios in order to be assured of a consistent supply of profitable product. As a result, the majority of screens in Australia are likely to be booked up to a year ahead based around the upcoming release schedules of the American studios (Aveyard and Moran 2009: 11). With the major exhibitors controlling around 70 per cent of Australian cinema screens (Screen Australia 2009b), this significantly reduces the opportunities for independent films. In addition, the forward booking by the major American studios tends to lead to a more formulaic and centralized approach to film programming. Major exhibitors tend to focus around a standard four to six week cinema release window for most of their films and rely on a regular turnover of product. Film scheduling tends to be undertaken at head office level and applied across all sites in the chain with little locational variation (Meggs 13 July 2009 interview).

Consequently major exhibitors often find it difficult to be responsive to the needs of individual specialized films, which may require a more customized approach to promotion and scheduling in order to find their audience. Independent exhibitors, on the other hand, while operating under similar financial imperatives to the majors, are nevertheless able to be more flexible with their programming because they are not locked into the same predetermined release schedules. They often have the capacity to run films for shorter periods of a week or less and, alternatively, when a film has been very successful, to extend the season and even bring very popular films back after they have closed for second and third runs (Dell 29 July 2009 interview).

Improved access to cinema in regional and rural Australia

Cinema exhibition in Australia is currently organized around a system that, for the present, is still based principally on the 35mm format. Under this system it is generally only major exhibitors in metropolitan areas that are guaranteed access to first release prints. Smaller independent cinemas must negotiate with distributors on a film by film basis and often have to wait until the conclusion of metropolitan releases before they can obtain what is then a second-hand print. The delay can range from four to six weeks up to several months in some cases, by which time the DVD release date may be looming and public interest in the film has waned.

In 2005 the then head of Industry and Cultural Development at the Australian Film Commission gave a very positive assessment of the potential of digital cinema to address the problems of accessibility that exist under this two tier system:

Audiences in the smallest and most remote country towns in Australia, that currently do not get to see many programs due to a business model that can't economically support them, would be able to view a film on the same day as its release in Sydney (Gadd 2005: 60)

The assumption is that because digital prints can be made at a much lower cost than 35mm, distributors will make more of them and any cinema, either major or independent, who wants to screen a film on its national release date will be able to do so. However, while digital cinema may lower the threshold considerably in terms of eligibility for first release prints, it would be unrealistic to assume that there will be no threshold, as the comments above from the former Australian Film Commission suggest might be the case. There are costs involved in producing digital prints and distributors will surely continue to seek to be assured of a minimum return on that investment from a cinema before committing to supply it with a first release digital print. Under this scenario, numerous small rural cinemas are likely to remain second run theatres even after the digital conversion. However, the challenge for many regional and rural exhibitors, whether first or second run theatres, will be to firstly survive the transition, in order to access any benefits that might arise from more immediate access to films.

Digital cinema also creates opportunities for the screening of non-film content such as ballet, opera and music concerts, which may have particular benefit for people living in regional and rural areas who

may lack the option to see these kinds of cultural events live. Both major exhibitors and independents in Australia have already begun including these events as a regular, albeit small, component of their schedules (Palace Theatrical 2009, Elliott 2009). However, while providing cinema audiences with greater variety these events simultaneously reduce the number of screens available for film content and thereby may have an ultimately negative impact on cinematic diversity should their popularity increase significantly.

Conclusion

As a new format for distributing and presenting feature films, digital cinema offers distributors and many exhibitors the potential to increase profitability and operational efficiencies. What is clear though is that not all digital cinema is equal. For example, standard 2D digital technology does not dramatically alter the experience of watching films in a cinema. To date, box office figures suggest it is only the technical quality and novelty factor of 3D digital that is attracting audiences in any significant additional numbers.

However, despite the novelty enhanced technology, the cultural diversity of the cinema experience is under threat. The DCI digital cinema transition is likely to increase the American studios' domination of the local exhibition industry by reinforcing control of the supply of film content as well as the new projection standards. Major exhibitors are assured of place in the new digital cinema landscape but many independents face an uncertain future. Significant closures of independent cinemas will erode cultural diversity and reduce the options for audience seeking an alternative to the multiplex experience and opportunities to see specialized and independent films. For people in regional and rural Australia this may mean losing access to a cinema altogether.

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