

L'UHD ET SES NOUVEAUX ENJEUX

L'UHD ET SES NOUVEAUX ENJEUX

CONFÉRENCE UHD PARTNERS FRANCE – PARIS – 4 DÉCEMBRE 2019

20th CENTURY FOX

BDA

DOLBY

DTS

ECLAIR

EUROPACORP HOME ENTERTAINMENT

GAUMONT

LCJ

LG ELECTRONIQUE

MEDIA INDUSTRY

METROPOLITAN FILMEXPORT

MICROSOFT

MPO

PANASONIC

PARAMOUNT

PATHÉ

PHILIPS

PLAYSTATION

SAMSUNG

SILVERWAY MEDIA

SND-M6

SONOPRESS

SONY

SONY PICTURES HOME ENTERTAINMENT

STUDIO CANAL

TF1 VIDEO

THE WALT DISNEY COMPANY

TP VISION

UHDA

UNIVERSAL PICTURES

WARNER BROS

WILD SIDE VIDEO

XBOX

UHD Partners™
Ultra Haute Définition FRANCE

www.uhd-partners-france.org



Laurent Villaume

Président UHD Partners France
DGA Média Industry & Média Logistique



7 avril 2016 : conférence sur le lancement du BD UHD 4K en France.

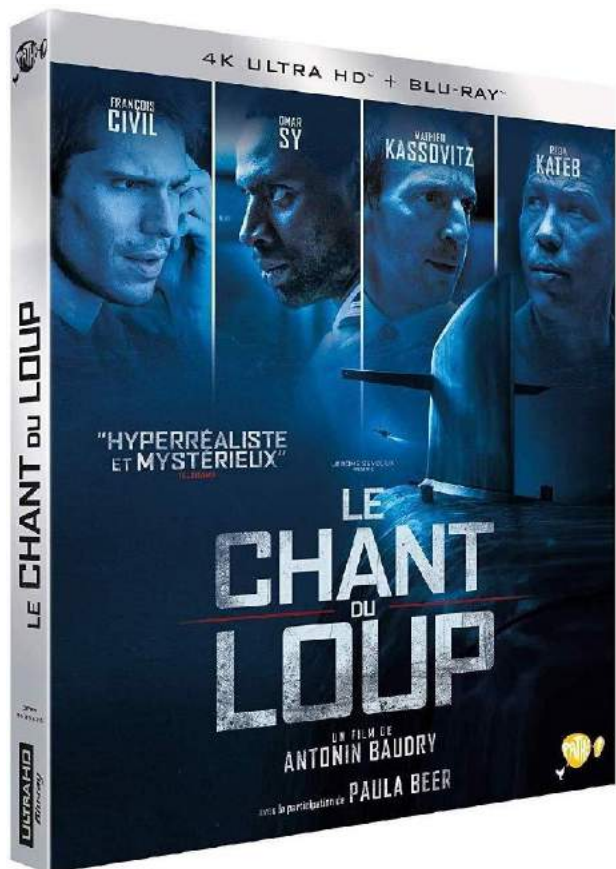
3 ans (et quelques mois) plus tard...

- Plus de 30 % des foyers possèdent un écran UHD 4K , ils seront 60% fin 2021
- Plus de 450 titres disponibles en BD UHD 4K, dont certains atteignent des scores tout à fait honorables (plus de 40K exemplaires écoulés sur certains titres) , l'adoption du HDR , Dolby Vision , Dolby Atmos , DTS X
- La captation et la retransmission d'événements (Coupe du Monde de Rugby , la F1, la Coupe d'Europe 2020 , Roland Garros etc) , les séries, l'arrivée de décodeurs UHD fibre et/ou satellites
- Un environnement global : le cinéma (salles Dolby 4DX) , la vidéo physique et digitale , le jeu Vidéo (la PS 5 sera équipée d'un lecteur BD UHD 4K).
- L'industrie de la musique vient de signer un accord avec Dolby Atmos (enfin...)

Un public demandeur , des consommateurs de plus en plus avertis,
,
un engouement extrêmement fort (Paris Audio Video Show)

Mais aussi nos réalisateurs.....

The image shows a YouTube video player interface. The video content features two men in front of a stone building. The man on the right, Antonin Baudry, is holding a Blu-ray case for 'Le Chant du Loup'. A red arrow points to him with the text 'ANTONIN BAUDRY'. To the left is a large Blu-ray box set for 'Le Chant du Loup'. Text overlays include 'TEST BLU-RAY', 'LE CHANT DU LOUP AVEC LE REALISATEUR !', and 'DOLBY VISION' and 'DOLBY ATMOS' logos. The video player controls at the bottom show a play button, volume, and a progress bar at 0:00 / 27:07. Below the video, the title 'TEST : Le Chant Du Loup en Blu-ray AVEC LE REALISATEUR !' is displayed, along with '24 376 vues • 3 juil. 2019' and engagement icons for likes (2K), dislikes (9), share, and save.



“ C’est le seul objet qui restera de mon film dans 10 ans ”

(Antonin Baudry Juin 2019 , Interview PP World)

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Victor Matsuda
Président de la BDA (USA)



Couple mythique

Blu-ray Disc Association



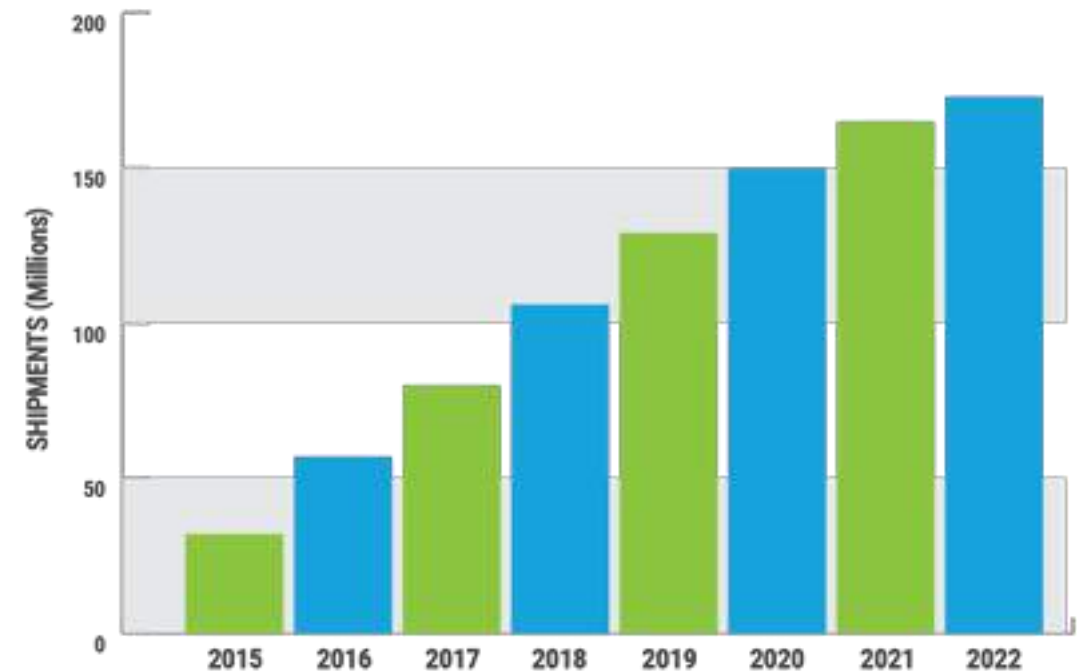
Key Points

- 4K Ultra HD TV Market continues to grow, driving demand for best quality content
- Ultra HD Blu-ray continues to be the absolute best quality/no-buffering content for 4K Ultra HD TVs
- Ultra HD Blu-ray, both hardware and software, experiencing approximately 26% and 56% growth, respectively
- In addition to the increasing number of new theatrical titles, studios are now also releasing new categories of content, including catalogue, local/regional, and episodic TV titles on Ultra HD Blu-ray
- The Blu-ray Disc Association continues its consumer education efforts and format promotion activities, with a special emphasis on targeted EU opportunities

4K Ultra HD TV continues to enjoy significant growth

- 4K Ultra HD TV shipments increased by nearly 33% in 2018 and expected to increase another 21% in 2019 and 16% in 2020
- 2019 will be first year that 4K Ultra HD TV shipments surpass non-4K Ultra HD TV shipments
- 61% of North American households will have 4K Ultra HD TVs by end of 2019

4K Ultra HD TV Shipments Worldwide



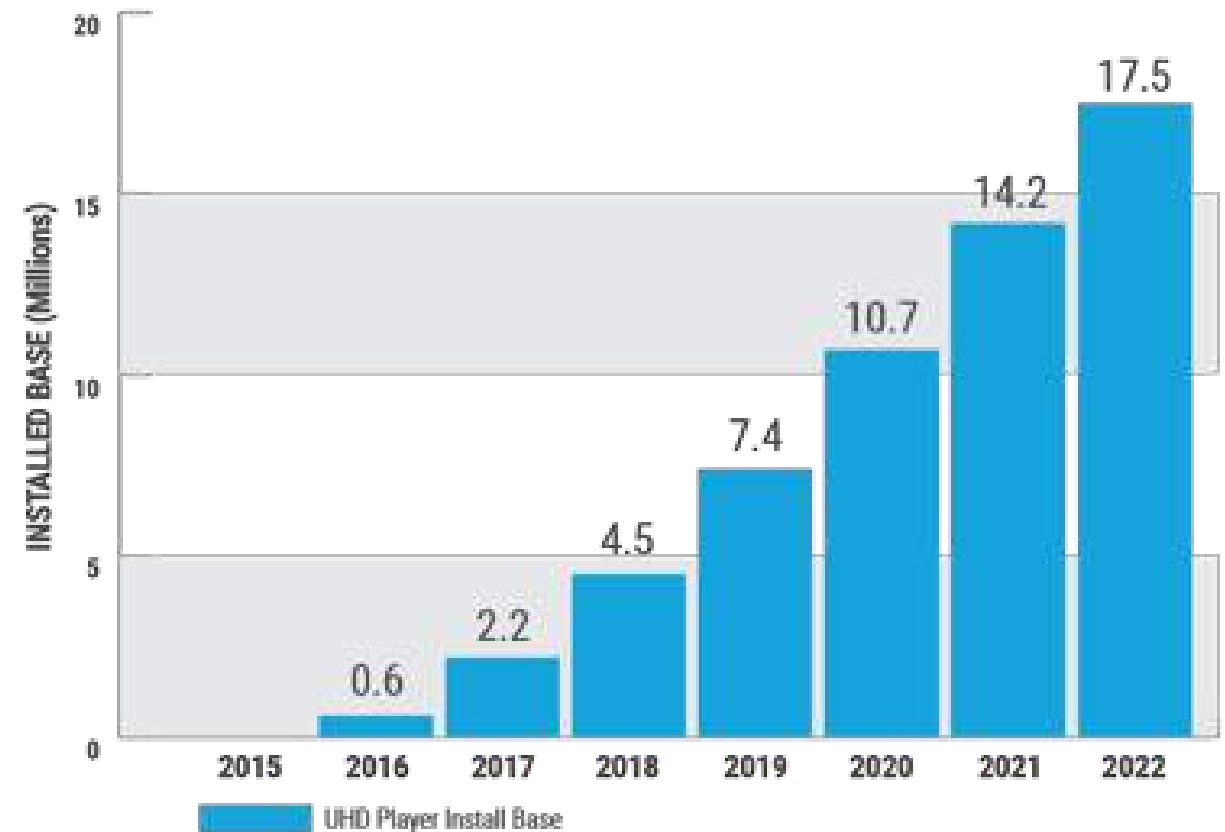
Source: FutureSource

Source: Futuresource

Ultra HD Blu-ray Player Growth

- Standalone Ultra HD Blu-ray player sales are on pace to surpass 2018 by 23% and further growth of 14% forecasted for 2020
- By EOY 2019 the total installed base of Ultra HD Blu-ray players will be 64% greater than it was at the end of 2018
- 23% of all Blu-ray players shipped WW in 2019 expected to be Ultra HD Blu-ray, anticipated to be almost 1/3 next year
- Healthy line-up of Ultra HD Blu-ray devices (as of Dec 1, 2019):
 - 4K UHD BD Players: 14 Models
 - Entry level at \$149

Ultra HD Blu-ray Player Installed Base



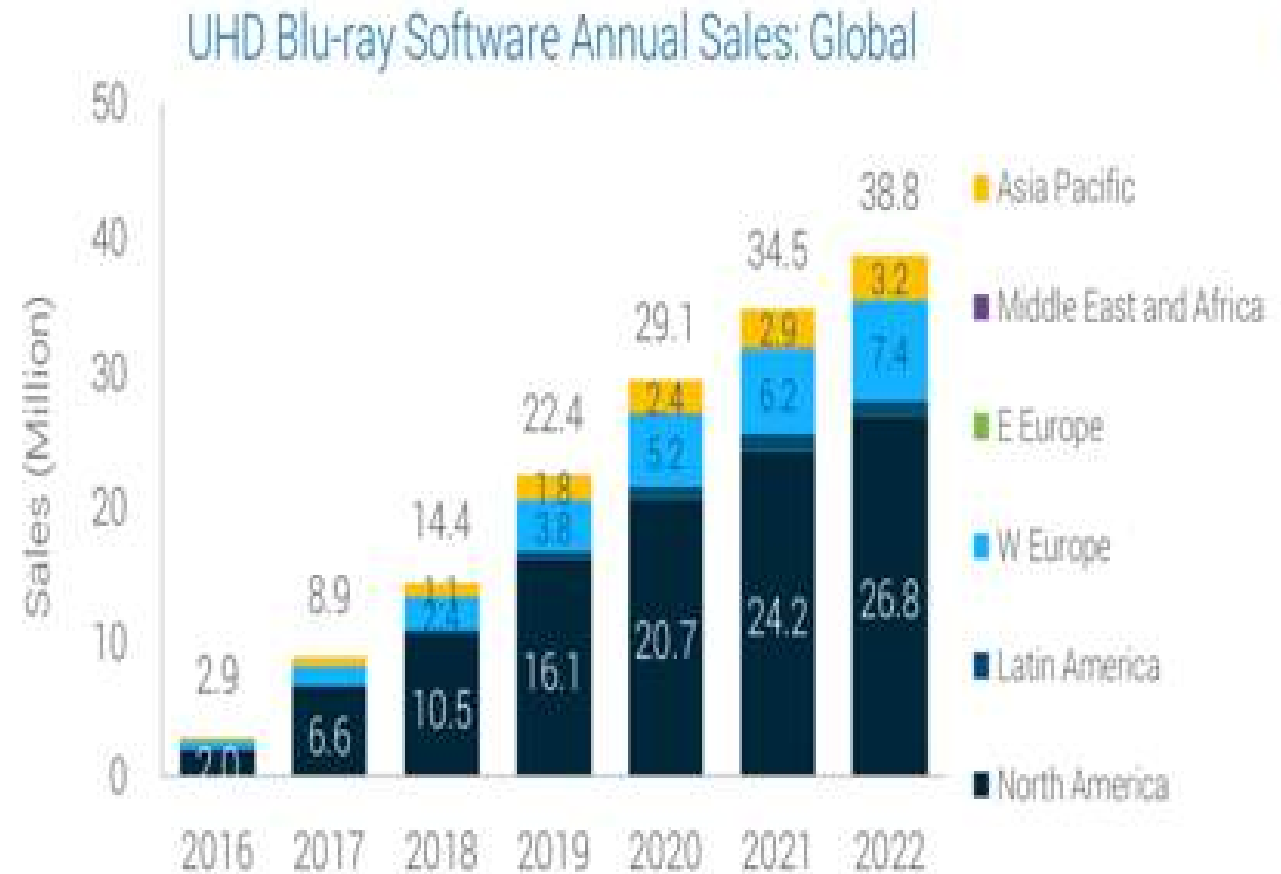
Source: Futuresource

Source: Futuresource

*Data excludes XBOX One sales

Ultra HD Blu-ray Content Growth

- Ultra HD Blu-ray sales continue to grow steadily, with nearly a 60% increase in 2019 vs. 2018, and another 30% increase forecasted for 2020
- Using the U.S. as an example, Ultra HD Blu-rays are expected to account for 16% of Blu-rays sold WW in 2019 and rising to 50% by 2023
- Key factors include the continuous release of the latest theatrical movies on Ultra HD Blu-ray, as well as recent Ultra HD Blu-ray titles from new categories: catalogue, local/regional, and episodic TV titles



Source: Futuresource

Ultra HD Blu-ray Content Growth

- Ultra HD Blu-ray titles available as of December 1:
 - US – 601
 - UK – 439
 - France – 450
 - Germany – 536
 - Japan – 387
- Studios are going deeper into catalog to remaster films for the format, including
 - *The Wizard of OZ*
 - *Alien*
 - *Scarface*



Ultra HD Blu-ray - the Premier 4K UHD Content Source

- Streaming growing but still hit or miss for 4K UHD
- Netflix recommends 25Mbps for 4K
- Most users well below that; in the EU: France, Germany, UK not even in top 10 in terms of broadband speeds

ISP LEADERBOARD - OCTOBER 2019		
France		
RANK	ISP	SPEED Mbps
1	SFR THD	4.24
2	Bouygues Telecom	3.80
3	Orange	3.72
4	Free	3.35
5	SFR	3.22

ISP LEADERBOARD - OCTOBER 2019		
Germany		
RANK	ISP	SPEED Mbps
1	Unitymedia KabelBW	4.47
2	Kabel Deutschland	4.37
3	Versatel	4.36
4	NetCologne	4.30
5	Telekom	4.24
6	EWE	4.24
7	M-net	4.13
8	o2	4.08
9	Vodafone Germany	3.84

ISP LEADERBOARD - OCTOBER 2019		
United Kingdom		
RANK	ISP	SPEED Mbps
1	Virgin	4.54
2	BT	4.48
3	TalkTalk Fiber	4.37
4	EE	4.23
5	Plusnet	4.19
6	Vodafone	4.14
7	Sky	4.12
8	TalkTalk DSL	3.35

Recent Developments Favoring Ultra HD Blu-ray

- Playstation 5 includes Ultra HD Blu-ray player capability
- The emergence of 8K displays should prove beneficial to Ultra HD Blu-ray as 4K Ultra HD discs will be the best source of content for these displays.
- There is little or no 8K content available, so upscaling will be required on 8K sets and Ultra HD Blu-ray provides the best source for that upscale
- As streaming services continue to venture into 4K and HDR, objective comparisons pointing to Ultra HD Blu-ray as offering the better picture quality

Recent Developments Favoring Ultra HD Blu-ray

“Avengers: Endgame is a visual triumph, including CGI characters like Thanos and the massive final battle scene against the Mad Titan’s full forces. But it looks like those signature visuals might differ a bit depending on how you watch the blockbuster. Fans notice this discrepancy and took to the internet, **where it was revealed that the images are crisper on the physical copies, as opposed to streaming.**”

This discrepancy makes a great deal of sense, simply because the movie is streaming. The movie is constantly loading in order to play, which typically affects the visual quality across all platforms. What's more, **Blu-ray is known for being the most crisp and visual-friendly type of owning movies. So it should probably bit a bit higher quality.”**

- Cinema Blend

Summary

- 4K Ultra HD TV Market continues to grow, driving demand for best quality content; Ultra HD Blu-ray continues to be the absolute best quality/no-buffering content for 4K Ultra HD TVs
- Ultra HD Blu-ray, both hardware and software, experiencing approximately 26% and 56% growth in 2019, respectively; continued healthy growth forecasted for 2020
- In addition to the increasing number of new theatrical titles, studios are now also releasing new categories of content, including catalogue, local/regional, and episodic TV titles on Ultra HD Blu-ray
- 8K? Ultra HD Blu-ray will be the premier source for viewing on 8K displays entering the market
- The inclusion of Ultra HD Blu-ray in PlayStation 5 will create a large jump in the installed base and bodes well for content sales.
- Best value and utility: Ultra HD Blu-ray, bonus features, and digital copy
- As subscription streaming services multiply, licensing rights can change and digital accessibility is not guaranteed. With Ultra HD Blu-ray, you OWN the movie you purchased!

L'UHD ET SES NOUVEAUX ENJEUX



Michael Fidler

Président de l' UHDA (USA)





Michael Hoog

Directeur des Communications de l' UHDA (USA)



MAINTAINING
CREATIVE
INTENT

MEMBERS

							
							
							
							
						Membership as of 8.20.19	

THE REQUEST

- Leading filmmakers approached the UHDA about developing a uniform solution to preserving creative intent in the home
- The UHDA was eager and ideally situated to engage in this conversation
 - Membership represents the entire home entertainment ecosystem



CREATIVE COMMUNITY QUESTIONNAIRE

Q: “How important is it to you to have a simple way to get your home TV set-up similar to monitors in the color-grading suite for viewing content that YOU created?”



**TOP 2 BOX:
SOMEWHAT/
MOST IMPORTANT**

140
DIRECTORS

122
CINEMATOGRAPHERS

12
COLORISTS

16
DIGITAL
IMAGING
TECHNICIANS

51
EDITORS

7
PRODUCERS

12
VFX
SUPERVISORS

2
WRITERS

11
OTHER

CONSUMER STUDY

88%

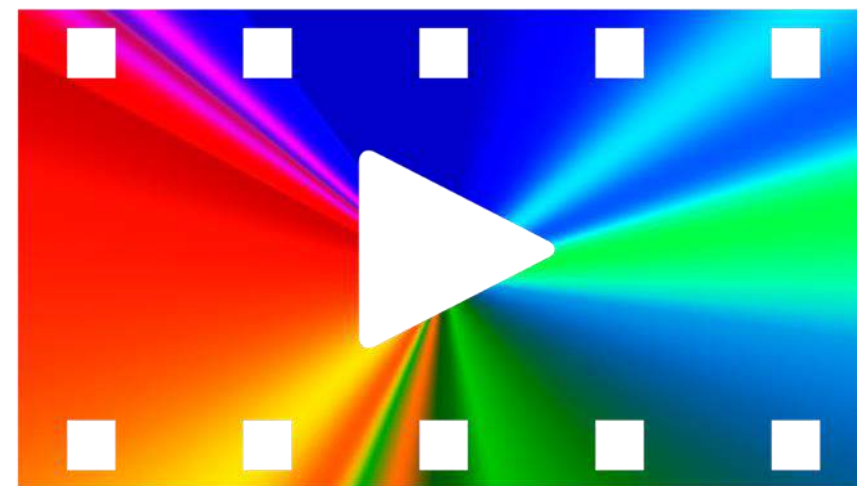
Of consumers would purchase a TV with Filmmaker Mode vs. without – if the TV specs are similar

94%

Amongst 4K TV owners

THE SOLUTION

- UHDA actively engaged the creative community in defining specifications for Filmmaker Mode
 - The home is an increasingly important viewing environment
- Primary goal was to ensure that consumers can access this mode very easily
 - Either automatically through metadata; or
 - Through a button on the remote
- To simplify the messaging for consumers, it was important to agree on a single name for this new viewing mode across manufacturers



FILMMAKER MODE™

THE LAUNCH



Star Wars: The Last Jedi Director, Rian Johnson, delivers keynote address at Filmmaker Mode Launch

“Your Skynet is motion smoothing. ... Luckily our John Connor has arrived, Filmmaker Mode...I want to get down on my knees and offer burnt sacrifices of thanks to the TV manufacturers who are in on this, and I hope others will follow their lead and show the world that they love movies.”

- Rian Johnson

THE LAUNCH



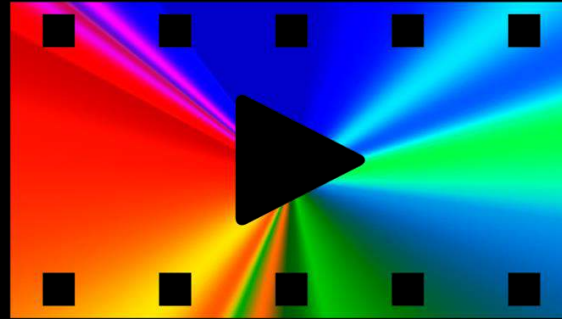
“I’ve now seen the Filmmaker Mode demonstrated up close, watching it instantly adjust an out of the box Vizio 4K consumer display to line up with a \$30K Sony reference monitor used widely by directors to grade their films. It’s stunning how well it works.”

- Bill Hunt The Digital Bits



FILMMAKER MODE™

TV LAUNCH PARTNERS



Panasonic®

VIZIO

HOW IT'S DONE



Technical Specification Overview

Goal: Preserve correct aspect ratio, colors and frame rates.

- Applies to both SDR & HDR content.
 - White Point: D65
- Image & Display Parameters
 - Maintain source content frame rate & aspect ratio.
 - Motion interpolation: OFF
 - Overscan: Only if signaled with the image
 - Sharpening: OFF
 - TV Noise Reduction: OFF
 - Other image "enhancement" processing: OFF

HOW IT'S DONE

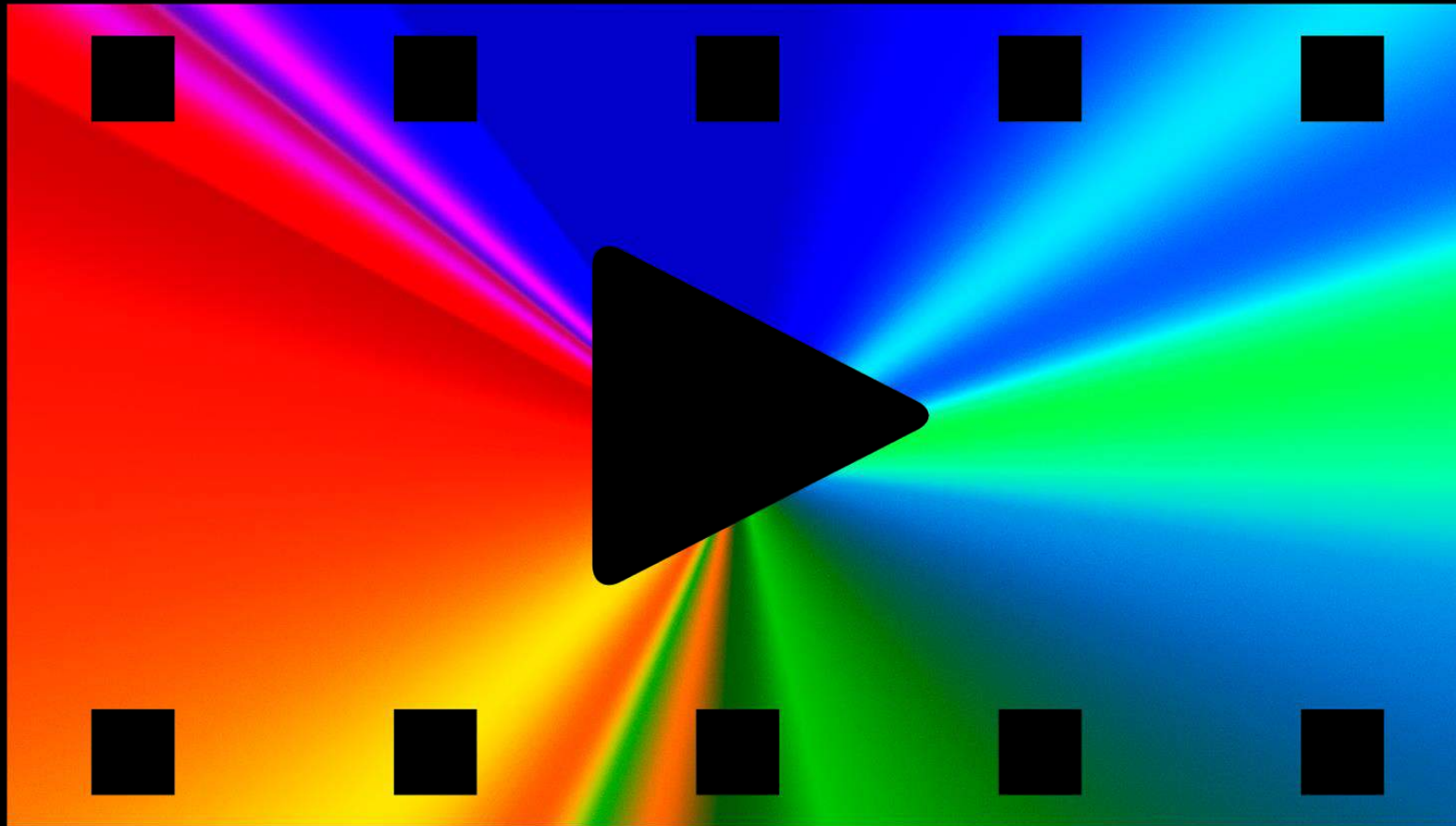
Consumer Access

Goal: Easily accessible to viewers

- Filmmaker Mode to be accessible through at least one of the following methods:
 1. A button on the remote; or
 2. Automatic display device switching based on Metadata in the video bitstream
- *Additionally, devices are encouraged to implement other user-friendly access methods, such as touch screen, voice control, etc.*

SUMMARY

- Filmmaker Mode is the result of an industry-first collaboration between the UHD Alliance, Filmmakers, CE Manufacturers and Hollywood Studios
- Filmmaker Mode displays movies and television shows as they were intended by the filmmaker
- Filmmaker Mode disables all post-processing (e.g. motion smoothing, etc.) preserving the correct aspect ratios, colors and frame rates
- Filmmaker Mode will be easily accessible on TVs from multiple manufacturers, without searching through different menus



FILMMAKER MODE™

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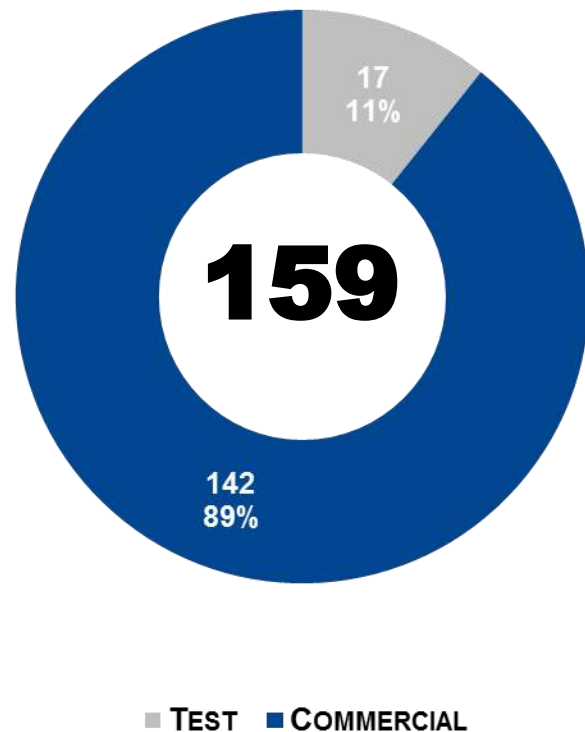
UHD PAR SATELLITE

Tom Christophory

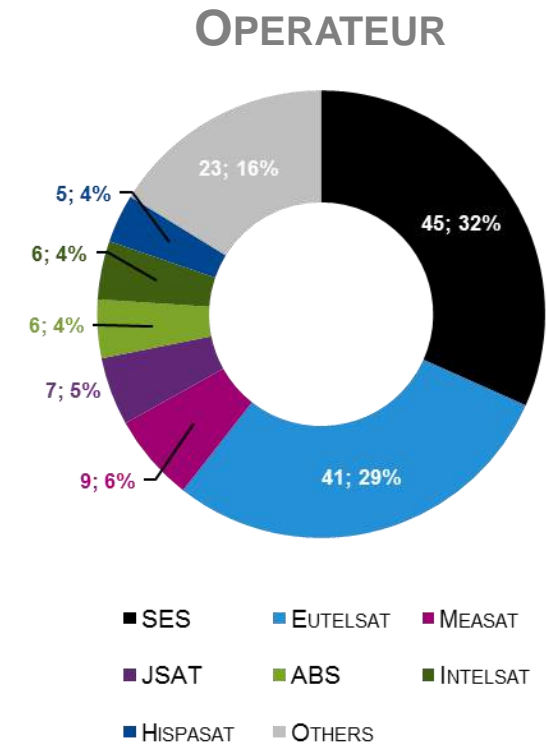
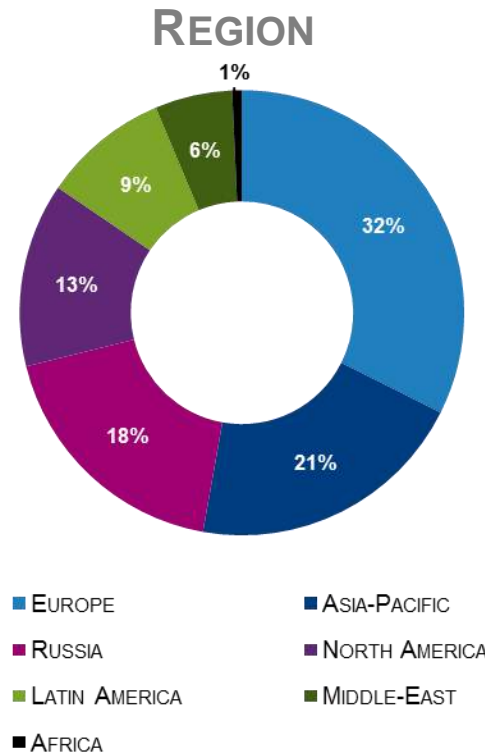
General Manager Video & IP Technology, SES (ASTRA)

SES▲

Monde – Combien de chaînes UHD par satellite en 2019?

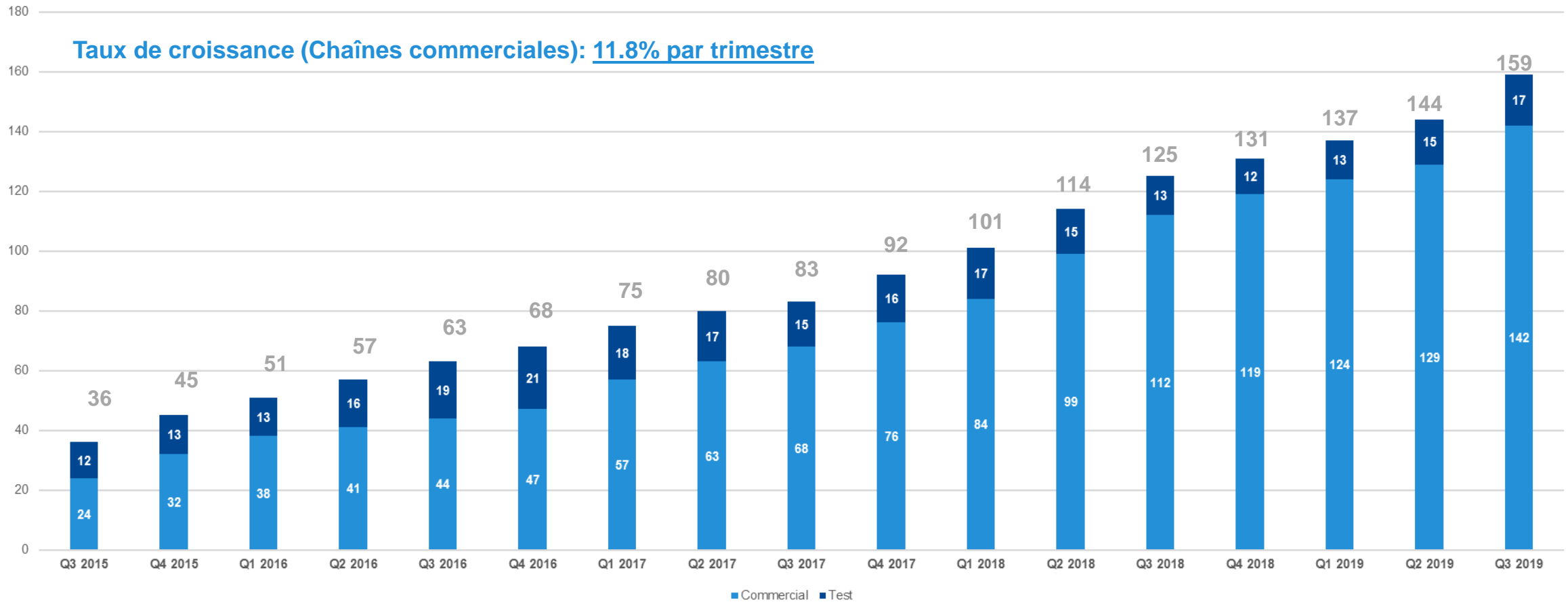


Chaînes commerciales en Ultra HD par ...



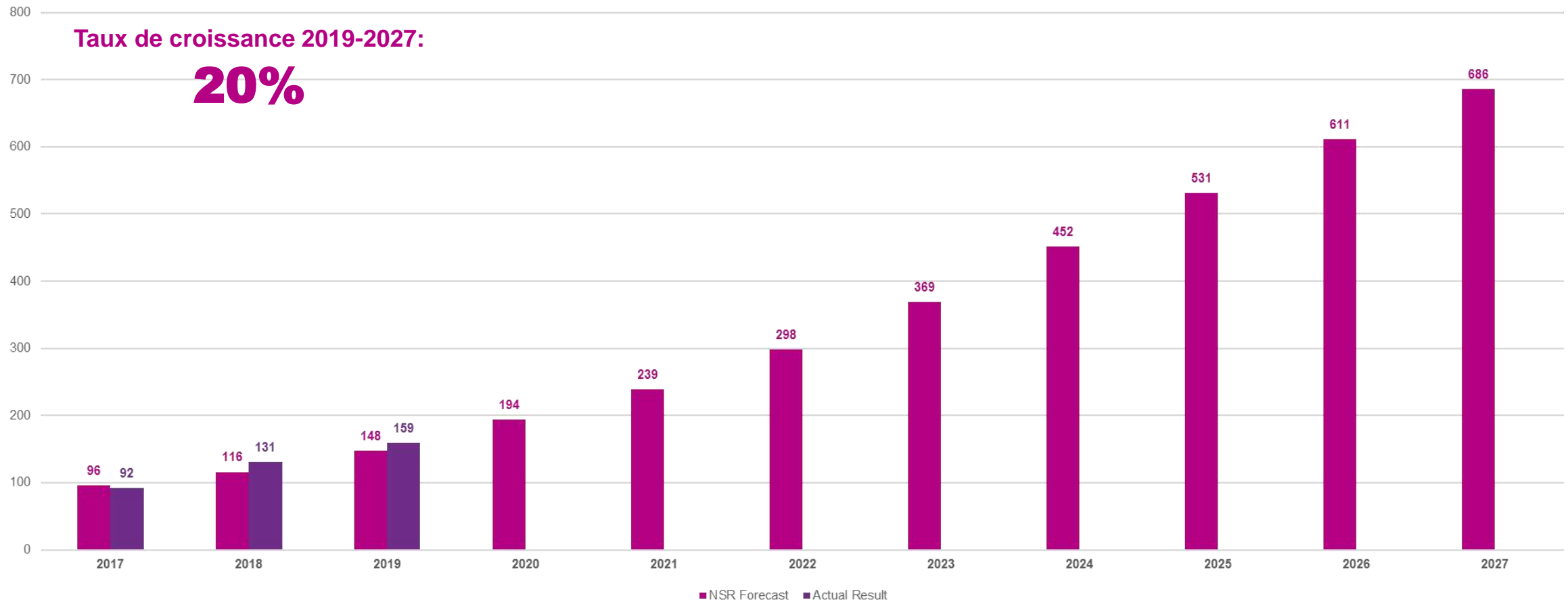
Source: Lyngsat – T3 2019

Monde – Croissance soutenue du nombre de chaînes UHD



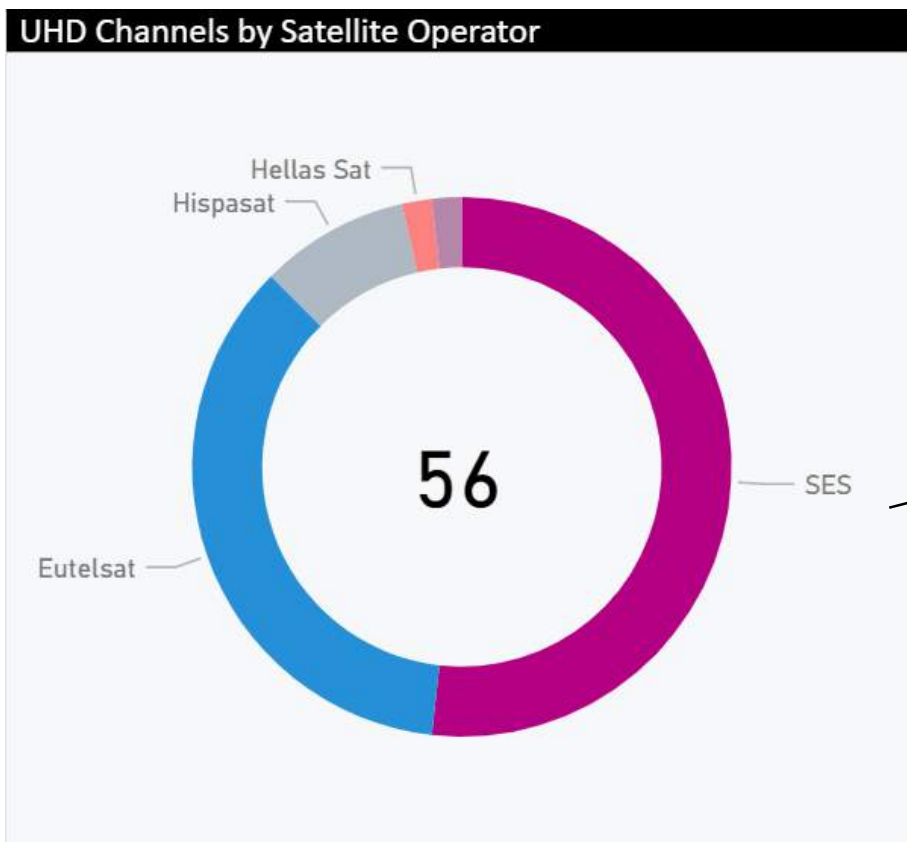
Source: Lyngsat – T3 2019

Près de 700 chaînes Ultra HD d'ici à 2027



Source: NSR – “Global Satellite Capacity Supply & Demand, 16th Edition - Juin 2019”

SES diffuse la moitié des chaînes UHD par satellite en Europe



Canal + en Ultra HD promo	3
Insight UHD	2
Canal + France	1
Fashion One 4K	1
NPO 1	1
Pearl TV	1
QVC Deutschland	1
RMC Sport 1	1
RTL UHD	1
Sky Sport Bundesliga UHD	1
Sky Sport UHD	1
Sky UHD 1	1
Sky UHD 2	1
Travelxp 4K Europe	1
UHD 1	1
Viasat Ultra HD	1

20 chaînes commerciales en UHD sur les satellites SES en Europe

Des contenus par satellite déjà disponibles sur notre flotte



#C4K360



CANAL+ 4K UHD



LE NOUVEAU DECODEUR CANAL
UN VÉRITABLE CONCENTRE DE TECHNOLOGIES



**LE DECODEUR
CANAL**

SATELLITE / INTERNET
4K-ULTRA HD
PROCESSEUR DUAL CORE
WIFI AC 4*4 QUANTUM
8 TUNERS

SUPER ENREGISTREUR DE 320 GO A 1 TO

QVC vient de lancer sa deuxième chaîne Ultra HD



Lancement: 1^{er} Décembre 2017



Lancement: 1^{er} Octobre 2019

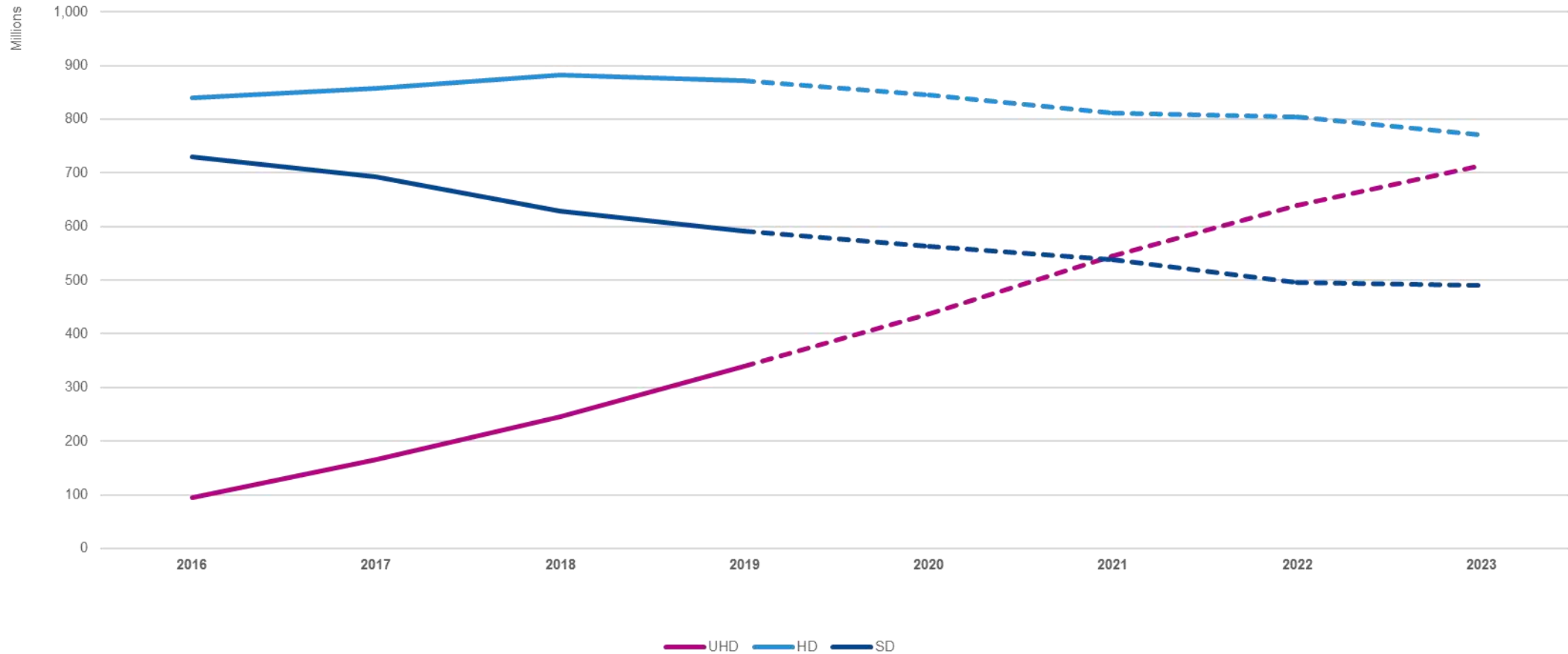


Le satellite contribue au déploiement à grande échelle de l'UHD



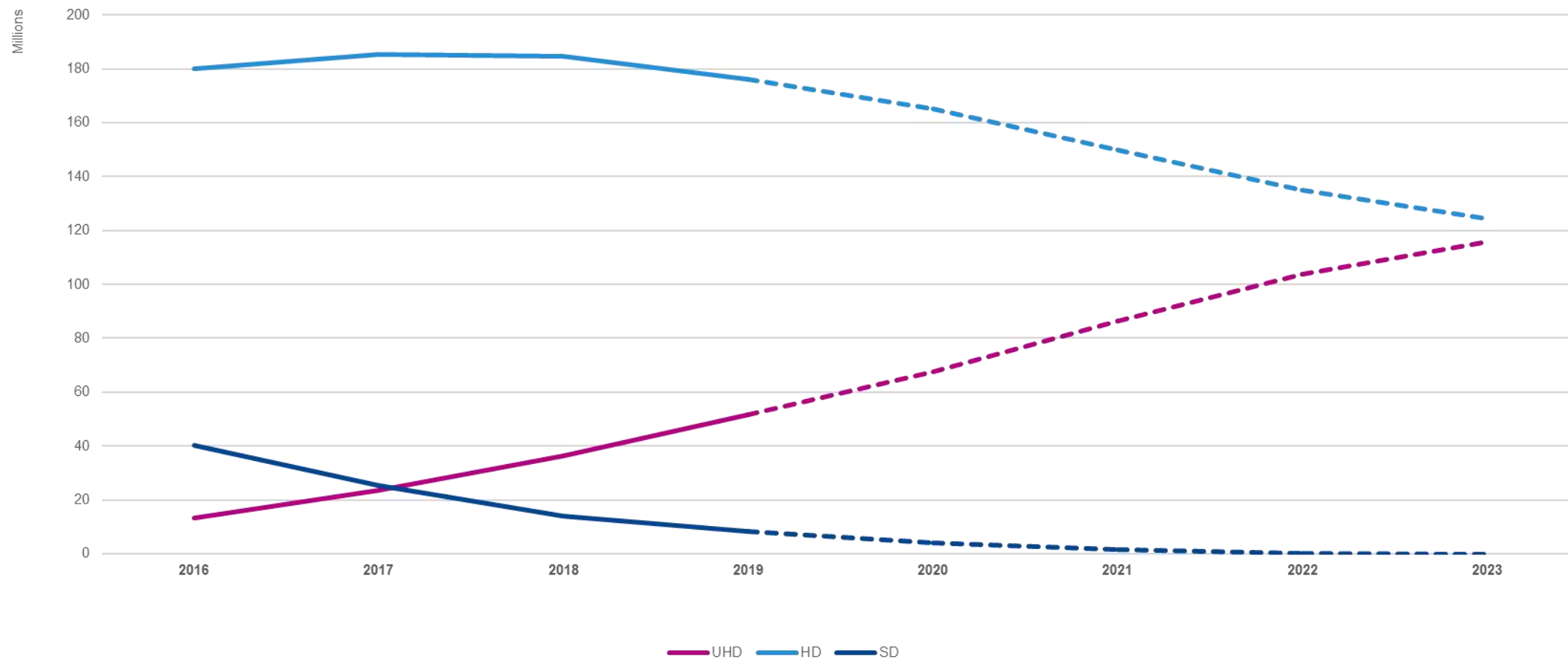
- Convergence sur **les normes et standards** pour la diffusion des contenus HDR au niveau mondial
 - Adoption progressive du HLG
- De plus en plus de **contenus 4K tournés** dans le monde
- Un parc de téléviseurs **installé de plus en plus important**
- Déploiement à **grande échelle en France** avec le lancement de l'offre 4K-UHD du groupe CANAL
 - Le satellite est la **solution technique pour la 4K live** en France
 - Couverture immédiate à 100% avec une qualité d'image et de service inégalée (vs Fibre, ADSL, TNT)
 - Déploiement massif du nouveau décodeur 4K UHD CANAL

Monde – Des foyers qui s'équipent de + en + en UHD



Source: Dataxis 2019 – Evolution de la résolution des écrans dans le monde

Europe – Forte pénétration des écrans UHD dans les foyers



Source: Dataxis 2019

Conclusion

- Le satellite est **la solution de diffusion de l'Ultra HD 4K**
 - Couverture immédiate à 100% avec une qualité d'image et de service inégalée
 - Facteurs économiques favorables pour un déploiement à grande échelle
- Le Business du satellite aujourd'hui se situe dans la **conversion des programmes vers la HD et l'UHD**
- La 8K débute mais nécessite **des débits trop élevés**
 - Objectif: un codec plus efficace pour atteindre un débit 8K entre 30-40 Mbit/s soit deux chaînes 8K par répéteur
 - Lancement des transmissions 8K (hors Japon et Corée) attendu au delà de 2025

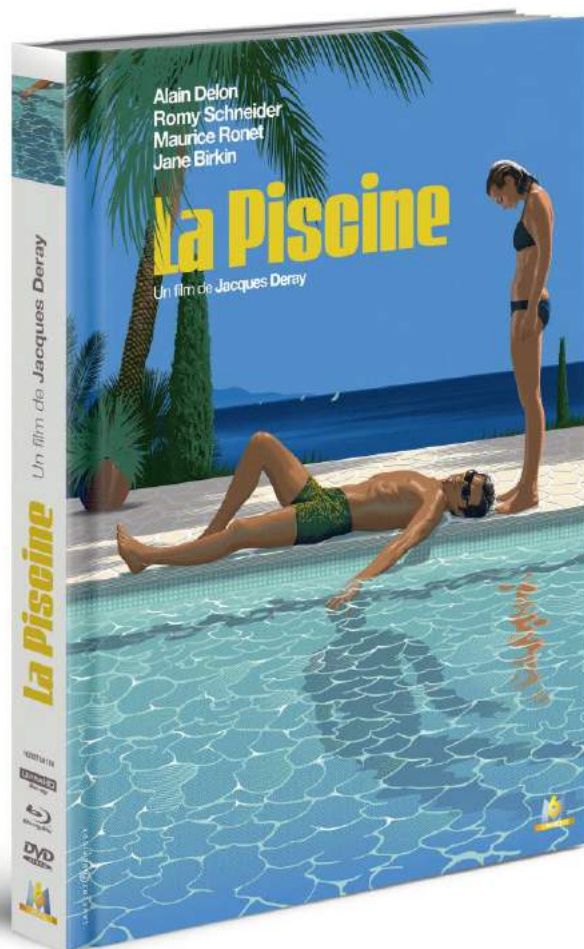
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Jérôme PICQUARD

Directeur marketing vidéo et digital
SND – M6 vidéo





POUR LES 50 ANS DU FILM QUI A RENDU LE COUPLE SCHNEIDER/DELON MYTHIQUE, LA VERSION RESTAUREE 4K DANS UNE EDITION ULTIME

Un packaging élégant

- Une illustration exclusive de Laurent Durieux
- Médiabook 3 disques : BD 4K – BD - DVD
- *La Piscine d'hier à aujourd'hui, signe des temps* : Livret inédit de 32 pages par Marion Laporte

Un contenu exhaustif avec bonus exclusifs

- La version anglaise du film sous-titrée,
- La fin alternative (UHD)
- Les bandes annonces française et anglaise (UHD)
- La course de natation : archives (UHD)
- 50 ans plus tard : Documentaire inédit réalisé par Agnès Vincent-Deray avec la participation de Alain Delon, Jane Birkin, Jean-Claude Carrière et Alain Page

La restauration 4K réalisée à partir du négatif original 35 mm et supervisée par Laurence Deray et Marina Girard-Muttelet, chez Filmo et Hiventy, est exceptionnelle



Une projection événement, en avant-première, au Festival Lumière dans sa section *Grandes Projections* !

Une ressortie cinéma par Unzero Films, au 23 octobre concomitamment à la sortie vidéo

La commercialisation d'affiches collector par *Nautilus Art Print* et *Plakat*

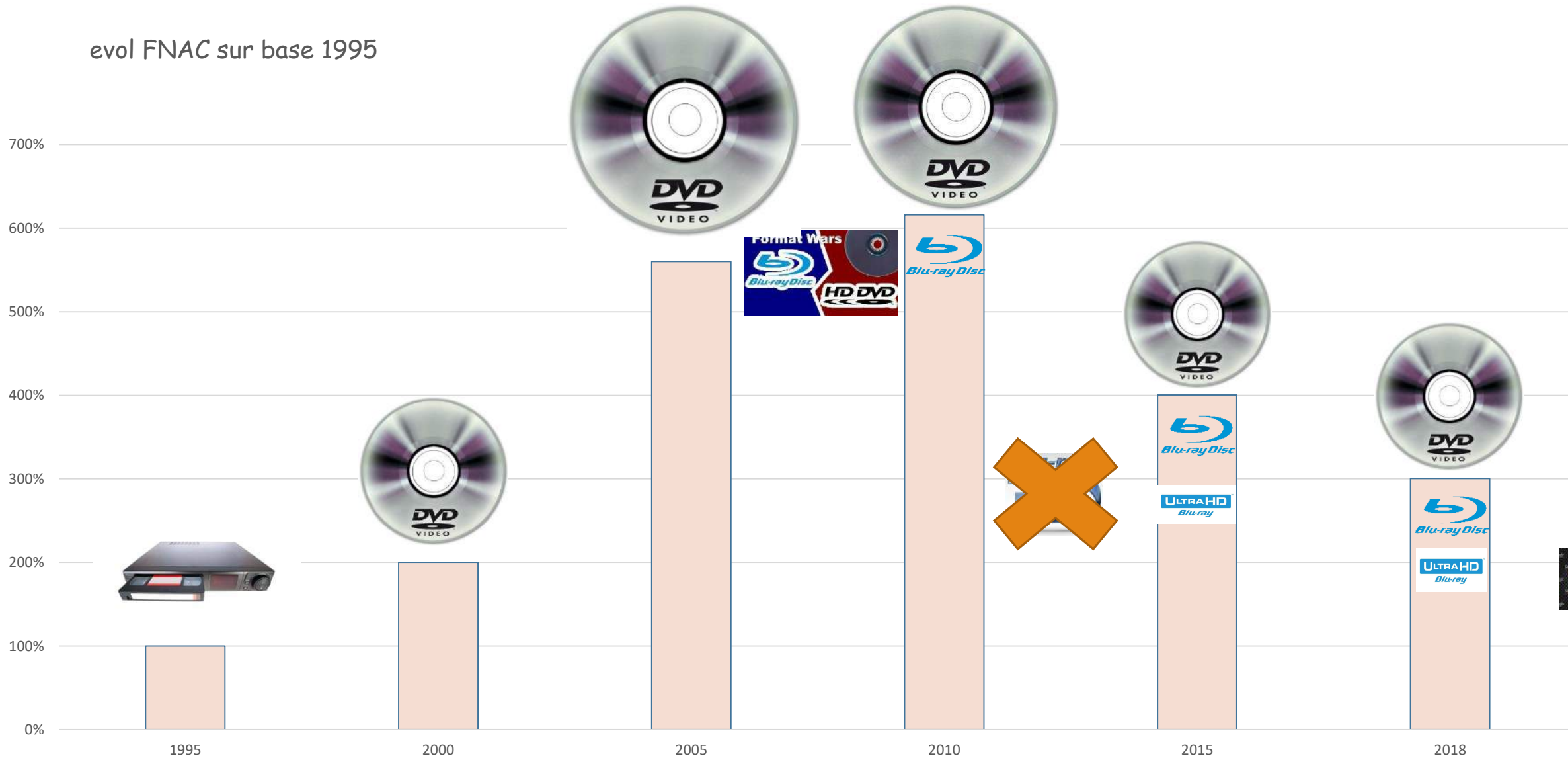




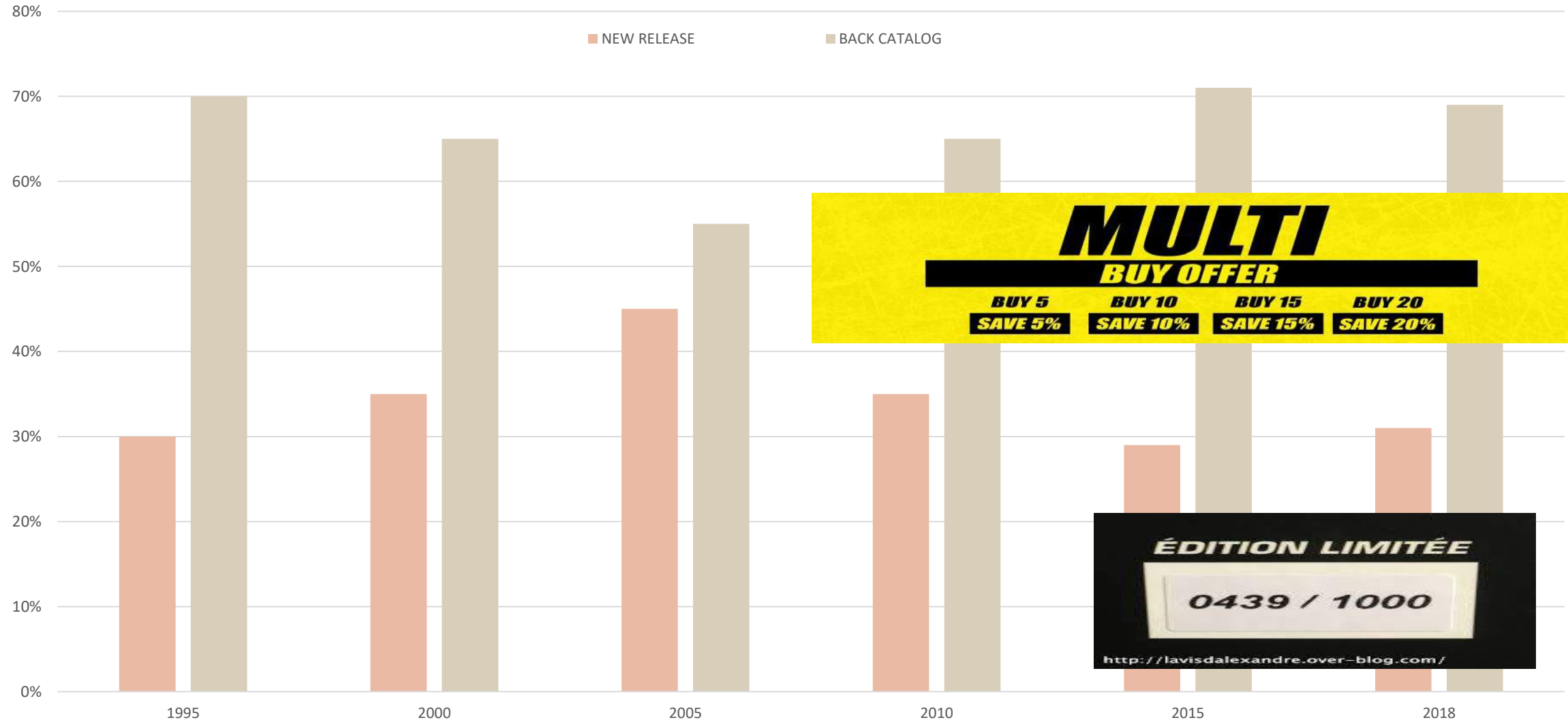
Bruno Jan

Chef de secteur vidéo enregistrée
Fnac/Darty

evol FNAC sur base 1995







FAVORISEZ LA PRE RESA ET UPGRADER LA VALEUR



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Patrick Marteau
Éditeur/Rédacteur en Chef
LES ANNEES LASER

LES ANNEES LASER
MAGAZINE DU CINÉMA À DOMICILE

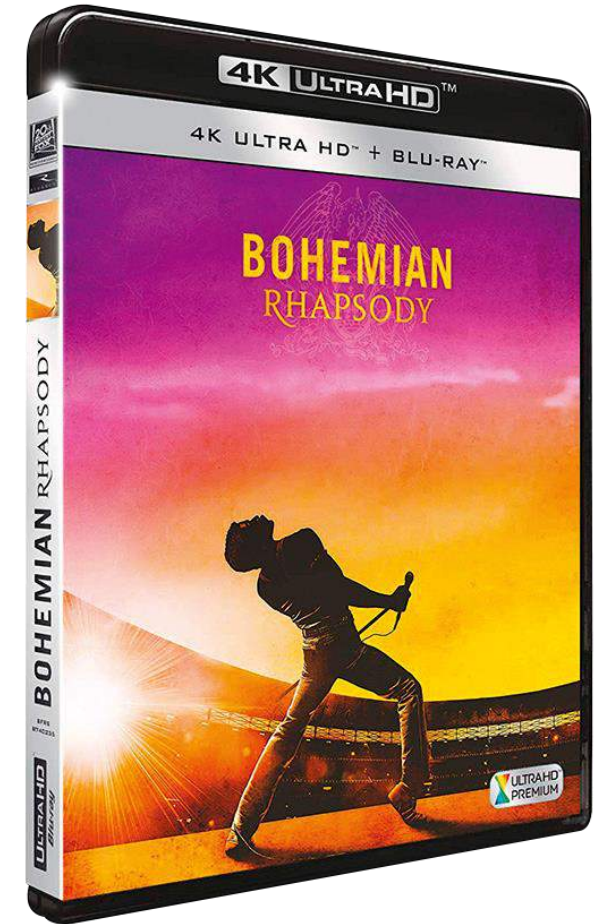
Hugo La Hutte
Directeur du développement
et de la stratégie Marketing
Son-Vidéo.com

Son-Vidéo.com
La référence hi-fi & home-cinéma





Meilleur Son Bohemian Rhapsody 20th Century Fox



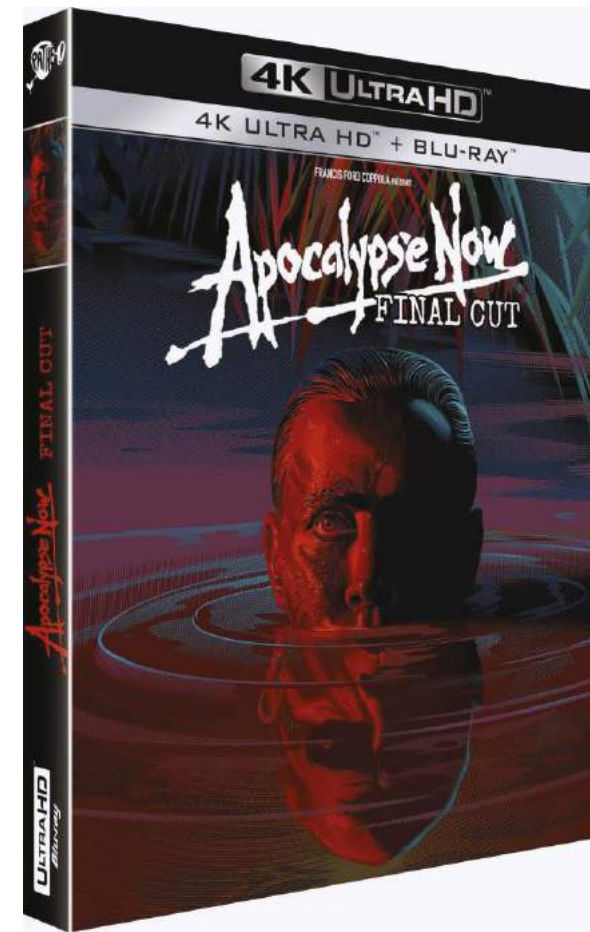


Meilleure Image
Alita battle angel
20th Century Fox





Meilleur film de Patrimoine
Apocalypse Now
Pathé



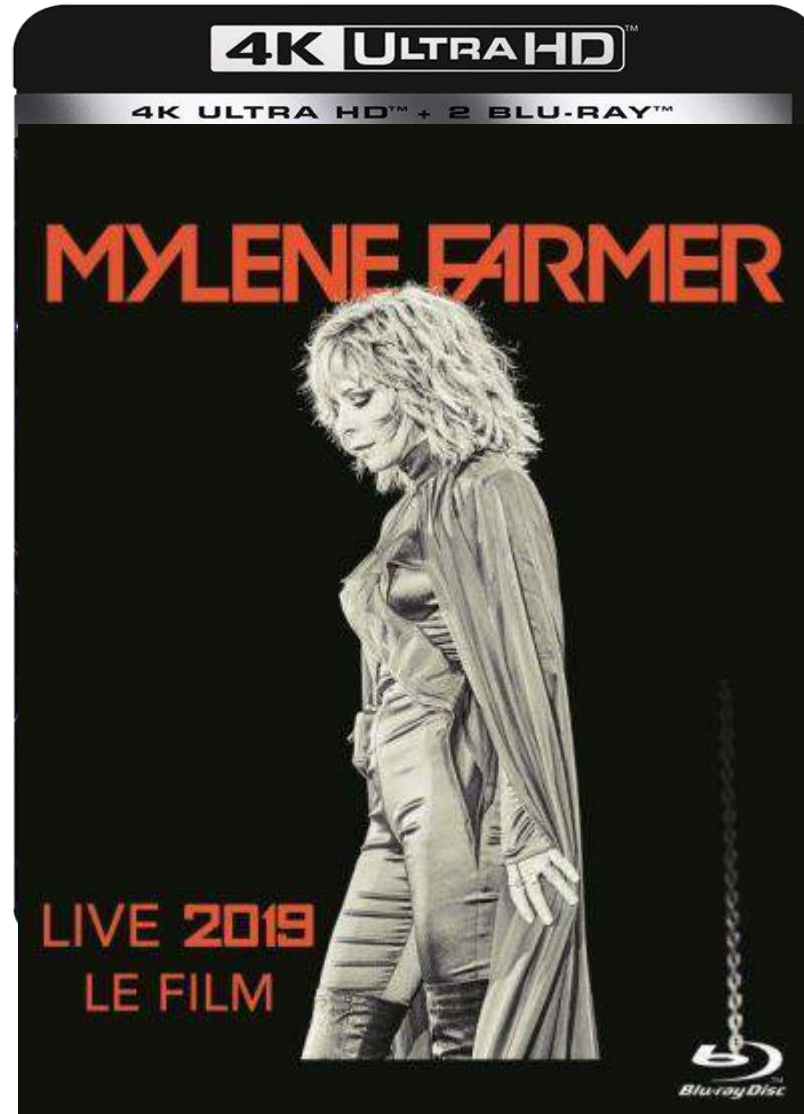


Le "Meilleur des Meilleurs" Avengers : Endgame Marvel





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Hubert Bouan du Chef du Bos
Délégué Général & Trésorier
UHD Partners France
Contact : [hubert @bouan .net](mailto:hubert@bouan.net)
www.uhd-partners-france

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