

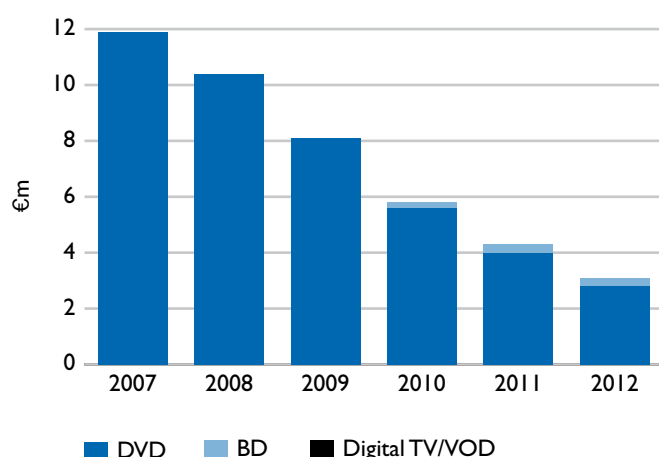
Croatia

Croatia: key data

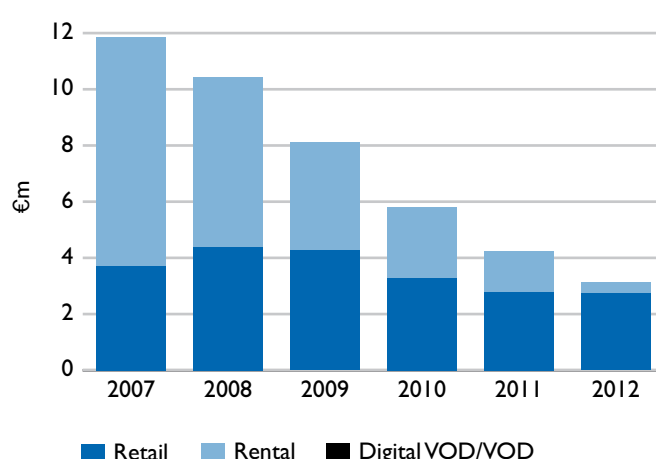
Population	4.4m
TV households	1.5m
DVD households (penetration)	64.3%
Blu-ray households (penetration)	5.2%
Distributors revenues from video software	Kuna 14.2m / € 1.9m
Comparison with 2011 (local currency)	-16.1%
DVD/ Blu-ray Disc split	€ 1.7m / € 0.2m
Video software rental/retail split (%)	7/93
Consumer spending on video software	Kuna 23.7m / € 3.1m
Comparison with 2011 (local currency)	-25.1%
DVD/ Blu-ray Disc split	€ 2.8m / € 0.3m
Video software rental/retail split (%)	-/-



Consumer spending by format



Consumer spending by sector



		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: Euro l=	Kuna	7.35	7.24	7.36	7.31	7.46	7.54	
Exchange rate: \$l=	Kuna	5.37	4.94	5.29	5.51	5.36	5.87	
Exchange rate: \$l=	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	4.43	4.42	4.42	4.41	4.40	4.40	-0.2%
Households	m	1.52	1.53	1.53	1.54	1.55	1.55	0.4%
HARDWARE								
TV households	m	1.49	1.50	1.51	1.52	1.53	1.53	0.6%
DVD sector								
DVD Video player/recorder households	m	0.592	0.683	0.798	0.881	0.943	0.987	4.7%
Penetration of TV households	%	39.8	45.6	52.9	58.1	61.8	64.3	
DVD console households	m	No data currently available						
Penetration of TV households	%	No data currently available						
BD sector								
BD standalone player households	m			0.0	0.0	0.0	0.1	129.4%
Penetration of TV households	%			0.0	0.3	2.3	5.2	
PS3 console households	m				0.0	0.1	0.1	10.9%
Penetration of TV households	%				2.8	3.3	3.6	

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
TRADE LEVEL PHYSICAL VIDEO								
<i>Total market figures include revenues from legacy formats not broken out separately (eg.VHS, HD-DVD, UMD) where relevant.</i>								
Total revenues from video software	Kuna m	41.1	36.8	29.9	20.9	17.0	14.2	-16.1%
Total revenues from video software	Euro m	5.6	5.1	4.1	2.9	2.3	1.9	-17.0%
Total revenues from retail video	Kuna m	23.8	23.9	22.1	15.8	13.5	13.2	-1.7%
Total revenues from retail video	Euro m	3.2	3.3	3.0	2.2	1.8	1.8	-2.7%
Total revenues from rental video	Kuna m	17.4	12.8	7.8	5.0	3.5	1.0	-71.6%
Total revenues from rental video	Euro m	2.4	1.8	1.1	0.7	0.5	0.1	-71.9%

Video market: Croatia

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL PHYSICAL VIDEO								
<i>Total market figures include spending on legacy formats not broken out separately (eg,VHS, HD-DVD, UMD) where relevant.</i>								
Total spending on video software	Kuna m	87.1	75.5	59.7	42.4	31.7	23.7	-25.1%
Total spending on video software	Euro m	11.9	10.4	8.1	5.8	4.2	3.1	-25.9%
Total spending on retail video	Kuna m	27.3	31.8	31.3	24.0	20.7	20.6	-0.4%
Total spending on retail video	Euro m	3.7	4.4	4.3	3.3	2.8	2.7	-1.5%
Total spending on rental video	Kuna m	59.8	43.7	28.4	18.4	11.0	3.1	-71.6%
Total spending on rental video	Euro m	8.1	6.0	3.9	2.5	1.5	0.4	-71.9%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no.	962	871	789	715	649		
Retail chains with 10 or more outlets	no.							
Kiosks stocking retail video	no.							

Trade level: DVD retail

Revenues from retail DVD	Kuna m	23.8	23.9	21.8	15.0	12.2	11.6	-5.0%
Revenues from retail DVD	Euro m	3.2	3.3	3.0	2.1	1.6	1.5	-6.0%
Retail DVD units shipped to trade	m	0.47	0.63	0.69	0.60	0.60	0.58	-3.4%
Average trade price	Kuna	50.22	37.80	31.50	25.20	20.16	19.84	-1.6%
Average trade price	Euro	6.83	5.22	4.28	3.45	2.70	2.63	-2.7%
Number of titles released	no.	815	800	785	760	760		

Trade level: BD retail

Revenues from retail BD	Kuna m		0.0	0.3	0.829	1.293	1.675	29.6%
Revenues from retail BD	Euro m		0.0	0.0	0.113	0.173	0.222	28.1%
Retail BD units shipped to trade	m		0.0	0.0	0.009	0.016	0.023	42.6%
Average trade price	Kuna			111.22	97.19	81.90	74.39	-9.2%
Average trade price	Euro			15.12	13.30	10.98	9.87	-10.2%

Consumer level: DVD retail

Spending on retail DVD	Kuna m	27.3	31.8	31.0	22.8	18.7	18.0	-4.0%
Spending on retail DVD	Euro m	3.7	4.4	4.2	3.1	2.5	2.4	-5.0%
Retail DVDs sold to consumers	m	0.39	0.53	0.62	0.57	0.59	0.57	-2.5%
Average consumer price	Kuna	70.00	60.00	50.00	40.00	32.00	31.50	-1.6%
Average consumer price	Euro	9.53	8.29	6.80	5.47	4.29	4.18	-2.7%

Consumer level: BD retail

Spending on retail BD	Kuna m			0.3	1.240	1.950	2.606	33.6%
Spending on retail BD	Euro m			0.0	0.170	0.262	0.346	32.2%
Retail BDs sold to consumers	m			0.0	0.008	0.015	0.022	47.1%
Average consumer price	Kuna			180.50	155.00	130.00	118.07	-9.2%
Average consumer price	Euro			24.54	21.22	17.44	15.66	-10.2%

Rental video market

		2007	2008	2009	2010	2011	2012	12/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	600	400	300	200	100		
Rental chains with 10 or more outlets	no.	2	2	2	1	1		
Trade level: DVD rental								
Revenues from rental DVD	Kuna m	17.4	12.8	7.8	5.0	3.5	1.0	-71.6%
Revenues from rental DVD	Euro m	2.4	1.8	1.1	0.7	0.5	0.1	-71.9%
Rental DVD units shipped to trade	m	0.14	0.14	0.10	0.08	0.07	0.02	-71.8%
Average trade price	Kuna	125.55	94.50	78.75	63.00	50.40	50.70	0.6%
Average trade price	Euro	17.09	13.06	10.71	8.62	6.76	6.73	-0.5%
Number of titles released	no.	515	400	285	185	185		
Consumer level: DVD rental								
Spending on DVD rental	Kuna m	59.8	43.7	28.4	18.4	11.0	3.1	-71.6%
Spending on DVD rental	Euro m	8.1	6.0	3.9	2.5	1.5	0.4	-71.9%
DVD rental transactions	m	5.2	3.8	2.5	1.6	1.0	0.3	-71.1%
Average rental price	Kuna	11.50	11.50	11.50	11.50	10.50	10.33	-1.6%
Average rental price	Euro	1.57	1.59	1.56	1.57	1.41	1.37	-2.7%

Source: IHS/IVF

Population and household figures: IHS Global Insight

Note: Distributor level excludes and consumer level includes VAT/sales tax