

Croatia

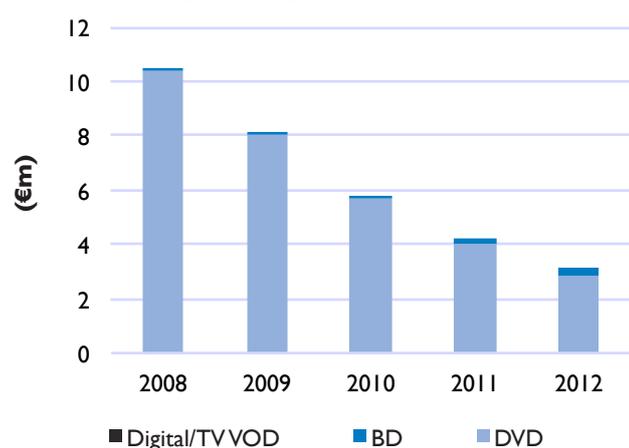
Croatia: key data

Population	4.4m
TV households	1.5m
DVD Video player/recorder penetration	65.9%
Blu-ray Disc player/recorders penetration	9.6%
Consumer spending on physical video software	Kuna 22.1m / € 2.9m
Comparison with 2012 (local currency)	-6.7%
DVD/ Blu-ray Disc split	€ 2.5m / € 0.4m
Video software rental/retail split (%)	9 / 91



Video market: Croatia

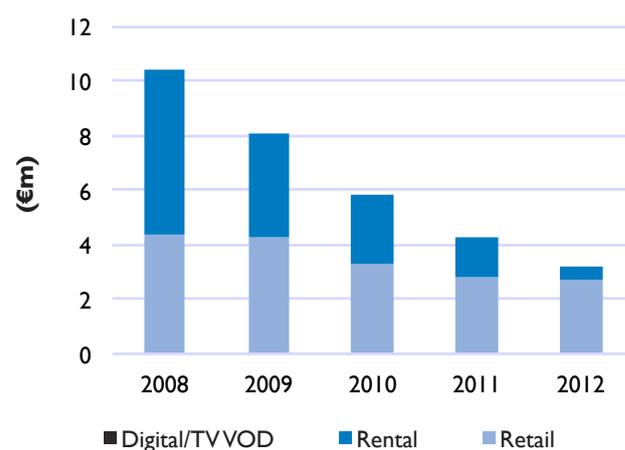
Consumer spending by format



Source: IHS/IVF

© 2014 IHS

Consumer spending by sector



Source: IHS/IVF

© 2014 IHS

		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: Euro l=	Kuna	7.26	7.37	7.29	7.44	7.52	7.58	
Exchange rate: \$l=	Kuna	4.94	5.28	5.50	5.34	5.85	5.71	
Exchange rate: \$l=	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	4.42	4.42	4.41	4.40	4.40	4.39	-0.2%
Households	m	1.53	1.53	1.54	1.55	1.55	1.56	0.4%
HARDWARE								
TV households	m	1.50	1.51	1.52	1.53	1.53	1.54	0.5%
DVD sector								
DVD Video player/recorder households	m	0.683	0.798	0.881	0.943	0.987	1.016	2.9%
Penetration of TV households	%	45.6	52.9	58.1	61.8	64.3	65.9	2.4%
DVD console households	m							
Penetration of TV households	%							
BD sector								
BD standalone player households	m		0.000	0.005	0.035	0.080	0.148	83.8%
Penetration of TV households	%		0.0	0.3	2.3	5.2	9.6	82.8%
PS3 console households	m			0.043	0.050	0.055	0.059	7.2%
Penetration of TV households	%			2.8	3.3	3.6	3.9	6.7%

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include revenues from legacy formats not broken out separately (eg. VHS, HD-DVD, UMD) where relevant.</i>								
Total spending on video	Kuna m	75.5	59.7	42.4	31.7	23.7	22.1	-6.7%
Total spending on video	Euro m	10.4	8.1	5.8	4.3	3.2	2.9	-7.5%

Video market: Croatia

		2008	2009	2010	2011	2012	2013	12/13
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	75.5	59.7	42.4	31.7	23.7	22.1	-6.7%
Total spending on video software	Euro m	10.4	8.1	5.8	4.3	3.2	2.9	-7.5%
Total spending on retail video	Kuna m	31.8	31.3	24.0	20.7	20.6	20.2	-1.8%
Total spending on retail video	Euro m	4.4	4.3	3.3	2.8	2.7	2.7	-2.7%
Total spending on rental video	Kuna m	43.7	28.4	18.4	11.0	3.1	1.9	-39.2%
Total spending on rental video	Euro m	6.0	3.9	2.5	1.5	0.4	0.3	-39.7%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	962	871	789	715	649		
Retail chains with 10 or more outlets	no.							
Kiosks stocking retail video	no.							

Consumer level: DVD retail

Spending on retail DVD	Kuna m	31.8	31.0	22.8	18.7	18.0	17.2	-4.2%
Spending on retail DVD	Euro m	4.4	4.2	3.1	2.5	2.4	2.3	-5.0%
Retail DVDs sold to consumers	m	0.53	0.62	0.57	0.59	0.57	0.55	-3.0%
Average consumer price	Kuna	60.0	50.0	40.0	32.0	31.5	31.1	-1.2%
Average consumer price	Euro	8.27	6.78	5.49	4.30	4.19	4.11	-2.0%

Consumer level: BD retail

Spending on retail BD	Kuna m	0.02	0.33	1.24	1.95	2.61	2.98	14.3%
Spending on retail BD	Euro m	0.00	0.04	0.17	0.26	0.35	0.39	13.3%
Retail BDs sold to consumers	m	0.000	0.002	0.008	0.015	0.022	0.027	23.6%
Average consumer price	Kuna	194.5	180.5	155.0	130.0	118.1	109.1	-7.6%
Average consumer price	Euro	26.80	24.49	21.27	17.48	15.71	14.40	-8.4%

Rental video market

		2008	2009	2010	2011	2012	2013	12/13
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	400	300	200	100			
Rental chains with 10 or more outlets	no.	2	2	1	1			

Consumer level: DVD rental

Spending on DVD rental	Kuna m	43.7	28.4	18.4	11.0	3.1	1.9	-39.2%
Spending on DVD rental	Euro m	6.0	3.9	2.5	1.5	0.4	0.3	-39.7%
DVD rental transactions	m	3.8	2.5	1.6	1.0	0.3	0.2	-38.5%
Average rental price	Kuna	11.5	11.5	11.5	10.5	10.3	10.2	-1.2%
Average rental price	Euro	1.58	1.56	1.58	1.41	1.38	1.35	-2.0%

Source: IHS/IVF

Population and household figures: IHS Global Insight

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

Note: Consumer level digital video and TVVOD figures may differ from locally published figures due to the application of different definitions.