

Croatia

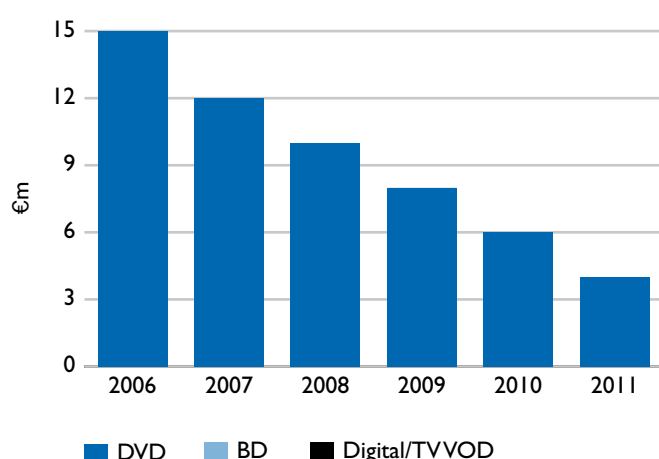
Croatia: key data

Population	4.4m
TV households	1.5m
DVD Video player/recorder	61.8%
Blu-ray Disc player/recorders penetration	2.3%
Distributor revenues from physical video software	Kuna 17m / € 2.3m
Comparison with 2010 (local currency)	-18.7%
DVD/ Blu-ray Disc split	€ 2.1m / € 0.2m
Video software rental/retail split (%)	21 / 79
Consumer spending on physical video software	Kuna 31.7m / € 4.2m
Comparison with 2010 (local currency)	-25.4%
DVD/ Blu-ray Disc split	€ 4m / € 0.3m
Video software rental/retail split (%)	35 / 65
Consumer spending on digital video and TV VOD	-
Comparison with 2010 (local currency)	-
Digital video/TVVOD split (%)	-

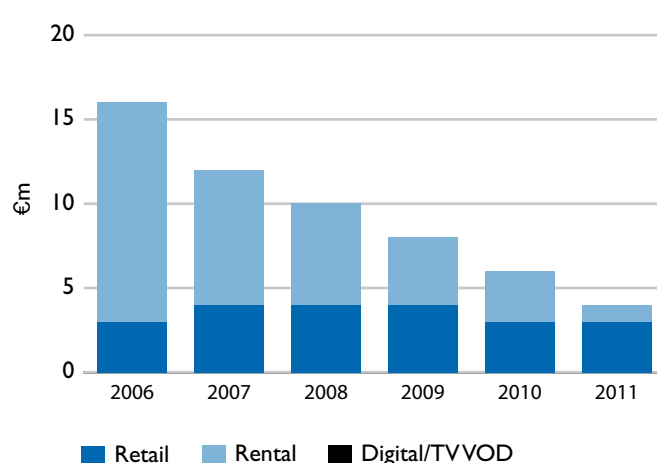


Video market: Croatia

Consumer spending by format



Consumer spending by sector



		2006	2007	2008	2009	2010	2011	10/11
EXCHANGE RATES								
Exchange rate: Euro l=	Kuna	7.33	7.35	7.24	7.36	7.31	7.46	
Exchange rate: \$l=	Kuna	5.84	5.37	4.94	5.29	5.51	5.36	
Exchange rate: \$l=	Euro	0.80	0.73	0.68	0.72	0.75	0.72	
GENERAL								
Population	m	4.44	4.43	4.42	4.42	4.41	4.40	-0.2%
Households	m	1.52	1.52	1.53	1.53	1.54	1.55	0.4%
HARDWARE								
TV households	m	1.48	1.49	1.50	1.51	1.52	1.53	0.7%
DVD sector								
DVD Video player/recorder households	m	0.355	0.592	0.683	0.798	0.881	0.943	7.1%
Penetration of TV households	%	24.0	39.8	45.6	52.9	58.1	61.8	
DVD console households	m							
Penetration of TV households	%							
BD sector								
BD standalone player households	m				0.000	0.005	0.035	614.6%
Penetration of TV households	%				0.0	0.3	2.3	
PS3 console households	m					0.043	0.050	16.3%
Penetration of TV households	%					2.8	3.3	

Total video software market

		2006	2007	2008	2009	2010	2011	10/11
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	38.7	41.1	36.8	29.9	20.9	17.0	-18.7%
Total revenues from video software	Euro m	5.3	5.6	5.1	4.1	2.9	2.3	-20.3%
Total revenues from retail video	Kuna m	15.6	23.8	23.9	22.1	15.8	13.5	-15.0%
Total revenues from retail video	Euro m	2.1	3.2	3.3	3.0	2.2	1.8	-16.7%
Total revenues from rental video	Kuna m	23.1	17.4	12.8	7.8	5.0	3.5	-30.3%
Total revenues from rental video	Euro m	3.2	2.4	1.8	1.1	0.7	0.5	-31.7%

Video market: Croatia

		2006	2007	2008	2009	2010	2011	10/11
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	115.5	87.1	75.5	59.7	42.4	31.7	-25.4%
Total spending on video software	Euro m	15.7	11.9	10.4	8.1	5.8	4.2	-26.9%
Total spending on retail video	Kuna m	19.1	27.3	31.8	31.3	24.0	20.7	-13.9%
Total spending on retail video	Euro m	2.6	3.7	4.4	4.3	3.3	2.8	-15.6%
Total spending on rental video	Kuna m	96.4	59.8	43.7	28.4	18.4	11.0	-40.3%
Total spending on rental video	Euro m	13.1	8.1	6.0	3.9	2.5	1.5	-41.5%

		2006	2007	2008	2009	2010	2011	10/11
CONSUMER LEVEL DIGITAL VIDEO								
<i>The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.</i>								
Total spending on digital video	Kuna m							
Total spending on digital video	Euro m							

CONSUMER LEVEL TV VOD								
<i>The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.</i>								
Total spending on TV VOD	Kuna m							
Total spending on TV VOD	Euro m							

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	1,013	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	15.6	23.8	23.9	21.8	15.0	12.2	-18.9%
Revenues from retail DVD	Euro m	2.1	3.2	3.3	3.0	2.1	1.6	-20.5%
Retail DVD units shipped to trade	m	0.3	0.5	0.6	0.7	0.6	0.6	1.4%
Average trade price	Kuna	52.0	50.2	37.8	31.5	25.2	20.2	-20.0%
Average trade price	Euro	7.09	6.83	5.22	4.28	3.45	2.70	-21.6%
Number of titles released	no.	850	815	800	785	760	760	

Trade level: BD retail								
Revenues from retail BD	Kuna m			0.02	0.27	0.83	1.29	56.0%
Revenues from retail BD	Euro m			0.003	0.036	0.113	0.173	52.8%
Retail BD units shipped to trade	m			0.000	0.002	0.009	0.016	85.1%
Average trade price	Kuna				111.2	97.2	81.9	-15.7%
Average trade price	Euro				15.12	13.30	10.98	-17.4%
Number of titles released	no.				100	150	150	

Consumer level: DVD retail								
Spending on retail DVD	Kuna m	16.9	27.3	31.8	31.0	22.8	18.7	-17.8%
Spending on retail DVD	Euro m	2.3	3.7	4.4	4.2	3.1	2.5	-19.4%
Retail DVDs sold to consumers	m	0.23	0.39	0.53	0.62	0.57	0.59	2.8%
Average consumer price	Kuna	75.0	70.0	60.0	50.0	40.0	32.0	-20.0%
Average consumer price	Euro	10.23	9.53	8.29	6.80	5.47	4.29	-21.6%

Consumer level: BD retail								
Spending on retail BD	Kuna m				0.33	1.24	1.95	57.3%
Spending on retail BD	Euro m				0.04	0.17	0.26	54.1%
Retail BDs sold to consumers	m				0.002	0.008	0.015	87.5%
Average consumer price	Kuna				180.5	155.0	130.0	-16.1%
Average consumer price	Euro				24.54	21.22	17.44	-17.8%

Rental video market

		2006	2007	2008	2009	2010	2011	10/11
Video rental outlets	no.	800	600	400	300	200	100	
Rental chains with 10 or more outlets	no.	2	2	2	2	1	1	
Trade level: DVD rental								
Revenues from rental DVD	Kuna m	23.1	17.4	12.8	7.8	5.0	3.5	-30.3%
Revenues from rental DVD	Euro m	3.2	2.4	1.8	1.1	0.7	0.5	-31.7%
Rental DVD units shipped to trade	m	0.17	0.14	0.14	0.10	0.08	0.07	-12.9%
Average trade price	Kuna	136.0	125.6	94.5	78.8	63.0	50.4	-20.0%
Average trade price	Euro	18.55	17.09	13.06	10.71	8.62	6.76	-21.6%
Number of titles released	no.	600	515	400	285	185	185	
Consumer level: DVD rental								
Spending on DVD rental	Kuna m	94.8	59.8	43.7	28.4	18.4	11.0	-40.3%
Spending on DVD rental	Euro m	12.9	8.1	6.0	3.9	2.5	1.5	-41.5%
DVD rental transactions	m	7.9	5.2	3.8	2.5	1.6	1.0	-34.6%
Average rental price	Kuna	12.0	11.5	11.5	11.5	11.5	10.5	-8.7%
Average rental price	Euro	1.64	1.57	1.59	1.56	1.57	1.41	-10.5%

Source: IHS Screen Digest/IVF

Population and household figures: IHS Global Insight

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