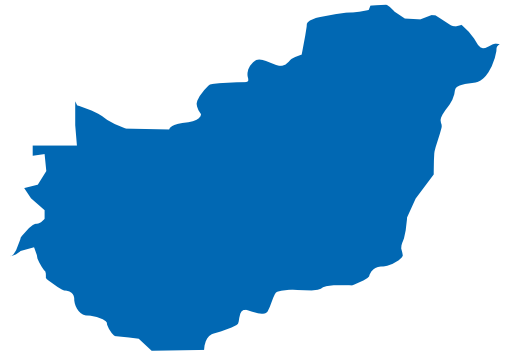


Hungary

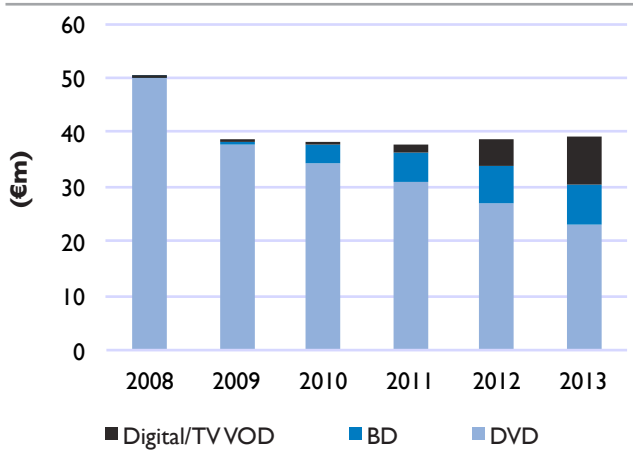
Hungary: key data

Population	9.9m
TV households	3.8m
DVD Video player/recorder penetration	66.8%
Blu-ray Disc player/recorders penetration	9.4%
Consumer spending on physical video software	forint 9.1bn / € 30.5m
Comparison with 2012 (local currency)	-6.7%
DVD/ Blu-ray Disc split	€ 23.1m / € 7.4m
Video software rental/retail split (%)	2 / 98
Consumer spending on digital video and TV VOD	forint 2565.7m / € 8.6m
Comparison with 2012 (local currency)	66.9%
TVVOD/ Digital video split (%)	34 / 66



Video market: Hungary

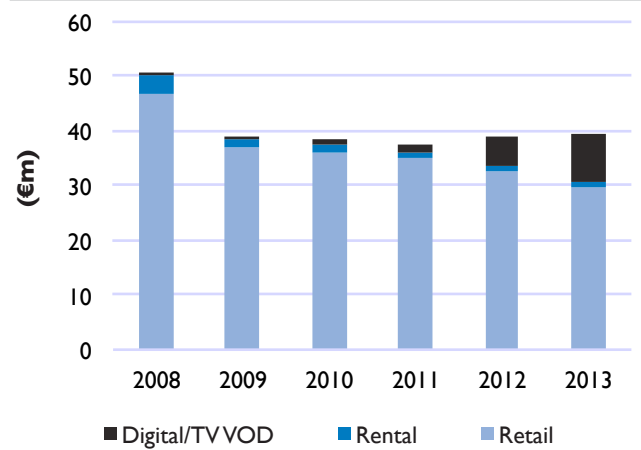
Consumer spending by format



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=	forint	253.14	282.23	275.67	279.94	289.16	297.13	
Exchange rate: \$l=	forint	172.11	202.34	207.94	201.11	225.06	223.73	
Exchange rate: \$l=	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	10.01	9.99	9.97	9.95	9.93	9.91	-0.2%
Households	m	3.81	3.83	3.85	3.87	3.89	3.93	0.9%
HARDWARE								
TV households	m	3.68	3.70	3.72	3.74	3.76	3.80	1.0%
DVD sector								
DVD Video player/recorder households	m	2.208	2.439	2.456	2.466	2.511	2.537	1.1%
Penetration of TV households	%	60.0	66.0	66.0	65.9	66.8	66.8	0.1%
DVD console households	m							
Penetration of TV households	%							
BD sector								
BD standalone player households	m	0.000	0.022	0.094	0.148	0.229	0.356	55.6%
Penetration of TV households	%	0.0	0.6	2.5	4.0	6.1	9.4	54.1%
PS3 console households	m							
Penetration of TV households	%							

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	forint m	12,678.2	10,957.7	10,599.3	10,512.4	11,249.9	11,631.1	3.4%
Total spending on video	Euro m	50.1	38.8	38.4	37.6	38.9	39.1	0.6%

Video market: Hungary

		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	forint m	12,625.0	10,850.0	10,359.4	10,099.7	9,712.3	9,065.4	-6.7%
Total spending on video software	Euro m	49.9	38.4	37.6	36.1	33.6	30.5	-9.2%
Total spending on retail video	forint m	11,876.4	10,367.2	9,934.2	9,761.7	9,435.8	8,839.6	-6.3%
Total spending on retail video	Euro m	46.9	36.7	36.0	34.9	32.6	29.7	-8.8%
Total spending on rental video	forint m	748.6	482.8	425.3	338.0	276.6	225.8	-18.3%
Total spending on rental video	Euro m	3.0	1.7	1.5	1.2	1.0	0.8	-20.5%

		2008	2009	2010	2011	2012	2013	12/13
<i>Owing to a definitional change, digital video and TVVOD numbers may differ from those published in the 2012 IVF Yearbook.</i>								
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	forint m	11.8	15.1	17.3	45.3	887.5	1,686.4	90.0%
Total spending on digital video	Euro m	0.05	0.05	0.06	0.16	3.07	5.68	84.9%

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 TVVOD	forint m	41.5	92.6	222.5	367.4	650.1	879.3	35.2%
Total spending on TVVOD	Euro m	0.2	0.3	0.8	1.3	2.2	3.0	31.6%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	531	560	570				
Retail chains with 10 or more outlets	no.							
Kiosks stocking retail video	no.							

Consumer level: DVD retail

Spending on retail DVD	forint m	11,864.8	10,207.2	9,055.7	8,336.2	7,579.4	6,650.0	-12.3%
Spending on retail DVD	Euro m	46.9	36.2	32.8	29.8	26.2	22.4	-14.6%
Retail DVDs sold to consumers	m	6.80	6.44	6.08	5.69	5.26	4.67	-11.1%
Average consumer price	forint	1,744.8	1,586.2	1,490.1	1,465.7	1,441.8	1,422.6	-1.3%
Average consumer price	Euro	6.89	5.62	5.41	5.24	4.99	4.79	-4.0%

Consumer level: BD retail

Spending on retail BD	forint m	11.55	159.96	878.49	1425.49	1856.39	2189.60	17.9%
Spending on retail BD	Euro m	0.05	0.57	3.19	5.09	6.42	7.37	14.8%
Retail BDs sold to consumers	m	0.002	0.030	0.134	0.255	0.390	0.533	36.8%
Average consumer price	forint	6389.4	5413.1	6553.1	5588.5	4765.9	4107.8	-13.8%
Average consumer price	Euro	25.24	19.18	23.77	19.96	16.48	13.82	-16.1%

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.	300	270	270				
Rental chains with 10 or more outlets	no.							

Consumer level: DVD rental								
Spending on DVD rental	forint m	748.6	482.8	425.3	338.0	276.6	225.8	-18.3%
Spending on DVD rental	Euro m	3.0	1.7	1.5	1.2	1.0	0.8	-20.5%
DVD rental transactions	m	1.5	1.1	0.9	0.8	0.6	0.5	-19.7%
Average rental price	forint	500.0	450.0	450.0	441.0	447.4	455.1	1.7%
Average rental price	Euro	1.98	1.59	1.63	1.58	1.55	1.53	-1.0%

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.