

Ireland

Ireland: key data

Population	4.2m
TV households	1.4m
DVD households (penetration)	97.5%
Blu-ray Disc household (penetration)	3.4%
Distributor revenues from physical video software	€ 81.1m
Comparison with 2009	-21.4%
DVD/Blu-ray Disc split	€ 76.1m / € 5m
Video software rental/retail split	11/89
Consumer spending on physical video software	€ 174m
Comparison with 2009	-19.0%
DVD/Blu-ray Disc split	€ 166.5m / € 7.5m
Video software rental/retail split	31/69



DVD and Blu-ray market

The Irish economic crisis in 2008 and the subsequent introduction of strict measures in the country in 2009 and 2010 had a major impact on the Irish video market performance in recent years.

Home video consumption in Ireland had historically been dominated by the rental business. The rental market share had fallen in the recent years from 39 per cent in 2004 to 29 per cent by 2010. However, this figure remained high compared to the rental share in other European territories and the UK where it accounted for just 9 per cent of consumer spending.

Higher average prices than in the UK and a lack of retailers stocking video, kept the DVD retail market relatively niche in Ireland. This largely prevented the commoditisation of the format, enabling it to remain more of an 'affordable luxury' than in the UK.

Retail

DVD unit sales declined 19.9 per cent in Ireland to 10.9 million in 2010. Average retail DVD prices fell by 22.2 per cent in 2009 and remained comparatively stable through 2010 (down 4.5 per cent to EUR 10.40). As a result, consumer spending on DVD declined for the third consecutive year resulting in a loss of 23.5 per cent in value to EUR 113.2 million.

The Blu-ray Disc (BD) format has still not gained traction on the Irish market. Though consumer spending on DVD and BD increased by 41 per cent in 2010, reaching EUR 6.45 million, BD only accounted for 2.6 per cent of consumer spending on total DVD and BD. Low consumer confidence and economic uncertainty considerably slowed down the format's adoption in the territory.

Rental

Although rental accounted for a relatively large share of video spending in Ireland compared to other countries, the sector was declining and following the broader European trend. The number of DVDs shipped for rental fell by 8.9 per cent in 2010 to 496,000 units.

Irish consumers made 11.4 million DVD rental transactions in 2010, spending EUR 53.3 million, a decline of 13.8 per cent compared to 2009.

In 2010, BD rental transactions remained very small in Ireland and little reliable information was available. IHS Screen Digest estimated that the format accounted for 2 per cent of rental transactions.

Online distribution

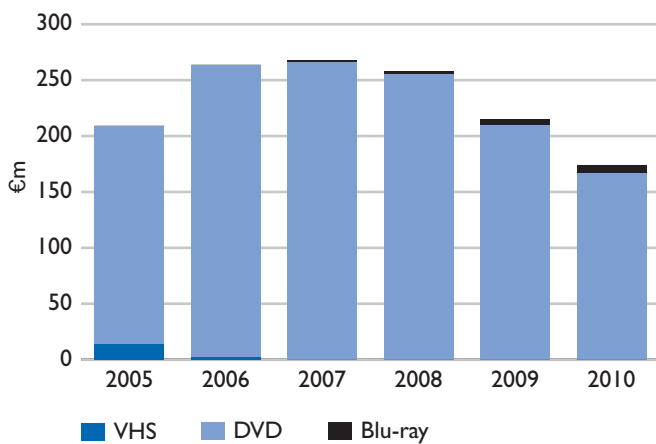
UPC remained the only significant cable VoD provider in Ireland though two small IPTV operators have joined the market.

In 2010, iTunes in Ireland introduced film titles to its Irish store and quickly dominated the small legitimate market for online film and video content over the course of the year. Other online players in Ireland were Microsoft's Zune Marketplace and Sky Player with a further five digital stores active in 2010.

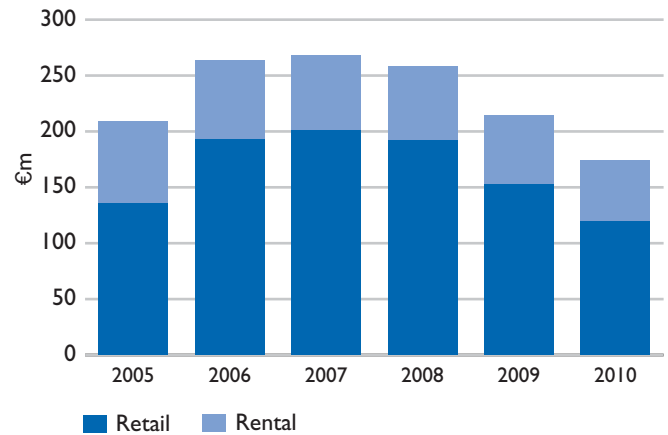
This commentary was provided by IHS Screen Digest.

Video market: Ireland

Consumer spending by format



Consumer spending by sector



		2005	2006	2007	2008	2009	2010	10/09
EXCHANGE RATES								
Exchange rate: \$1 =	Euro	0.80	0.80	0.73	0.68	0.72	0.75	
GENERAL								
Population	m	4.17	4.23	4.29	4.32	4.25	4.17	-1.9%
Households	m	1.37	1.40	1.42	1.45	1.47	1.50	1.8%
HARDWARE								
TV households	m	1.2	1.3	1.3	1.3	1.3	1.4	1.7%
DVD sector								
DVD Video player/recorder households	m	0.735	0.910	1.126	1.201	1.302	1.337	2.7%
Penetration of TV households	%	58.9	71.4	86.7	90.8	96.6	97.5	
DVD console households	m	0.631	0.618	0.633	0.646	0.708	0.804	13.6%
Penetration of TV households	%	50.5	48.5	48.8	48.8	52.5	58.7	
BD sector								
BD standalone player households	m				0.004	0.026	0.047	80.0%
Penetration of TV households	%				0.308	1.923	3.402	
PS3 console households	m			0.084	0.160	0.236	0.293	24.2%
Penetration of TV households	%			6.5	12.1	17.5	21.4	
Penetration of TV households								

Total video software market

		2005	2006	2007	2008	2009	2010	10/09
TRADE LEVEL PHYSICAL VIDEO								
Total revenues from video software	Euro m	98.5	129.7	134.2	128.0	103.1	81.1	-21.4%
Total revenues from retail video	Euro m	84.0	115.6	121.2	116.1	92.5	71.9	-22.3%
Total revenues from rental video	Euro m	14.5	14.1	13.0	11.9	10.6	9.2	-13.4%
CONSUMER LEVEL PHYSICAL VIDEO								
Total spending on video software	Euro m	209.4	263.9	267.8	258.2	214.9	174.0	-19.0%
Total spending on retail video	Euro m	135.5	192.9	200.4	192.3	152.5	119.6	-21.5%
Total spending on rental video	Euro m	73.9	71.0	67.3	65.9	62.4	54.4	-12.9%

Video market: Ireland

		2005	2006	2007	2008	2009	2010	10/09
CONSUMER LEVEL DIGITAL VIDEO*								
Total spending on digital video	Euro m	0.0	0.0	0.0	0.1	0.2	2.0	883.9%
CONSUMER LEVEL TVVOD**								
Total spending on TVVOD	Euro m	9.8	9.2	9.8	10.6	10.5	10.7	2.0%

*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.

**The delivery of movies and TV content on a transactional (VoD/INVoD/PPV) basis via cable/satellite/IPTV services.

Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	1,650	1,650	1,650	1,600	1,450	1,250	
Retail chains with 10 or more outlets	no	6	6	6	5	4	3	
Kiosks stocking retail video	no							
Trade level: DVD retail								
Revenues from retail DVD	Euro m	80.0	115.0	119.2	113.4	89.4	67.1	-25.0%
Retail DVD shipped to trade	m	7.8	11.3	12.6	13.5	13.7	10.8	-21.5%
Average trade price	Euro	10.26	10.19	9.44	8.38	6.52	6.23	-4.5%
Number of titles released	no	8,679	10,727	9,347	8,897	7,202	7,684	6.7%
Trade level: BD retail								
Revenues from retail BD	Euro m			1.7	2.7	3.1	4.8	54.9%
Retail BD shipped to trade	m			0.084	0.144	0.211	0.323	53.3%
Average trade price	Euro			20.58	18.78	14.69	14.85	1.1%
Consumer level: DVD retail								
Spending on retail DVD	Euro m	130.0	192.1	199.1	189.3	147.9	113.2	-23.5%
Retail DVD sold to consumers	m	7.6	11.3	12.6	13.5	13.6	10.9	-19.9%
Average consumer price	Euro	17.11	17.02	15.77	14.00	10.89	10.40	-4.5%
Consumer level: BD retail								
Spending on retail BD	Euro m			1.1	2.9	4.6	6.4	41.0%
Retail BD sold to consumers	m			0.033	0.101	0.200	0.291	45.2%
Average consumer price	Euro			33.20	28.59	22.84	22.18	-2.9%

Rental video market

		2005	2006	2007	2008	2009	2010	10/09
Video rental outlets	no	1,000	1,000	1,000	950	850	700	
Rental chains with 10 or more outlets	no	5	5	5	5	4	33	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	13.0	14.0	13.0	11.9	10.4	9.0	-13.9%
Rental DVD shipped to trade	m	0.60	0.65	0.61	0.59	0.54	0.50	-8.9%
Average trade price	Euro	21.67	21.54	21.41	20.25	19.16	18.13	-5.4%
Number of titles released	no	528	600	417	423	405	365	-9.9%
Trade level: BD rental								
Revenues from rental BD	Euro m					0.166	0.189	
Rental BD shipped to trade	m					0.011	0.013	
Average trade price	Euro					14.69	14.85	
Number of titles released	no				360	344	310	-9.9%
Consumer level: DVD rental								
Spending on DVD rental	Euro m	65.9	70.0	67.3	65.9	61.8	53.3	-13.8%
DVD rental transactions	m	14.7	15.0	14.5	14.2	13.2	11.4	-13.8%
Average rental price	Euro	4.47	4.67	4.64	4.65	4.67	4.67	
Consumer level: BD rental								
Spending on BD rental	Euro m					0.634	1.072	
BD rental transactions	m					0.136	0.230	
Average rental price	Euro					4.67	4.67	

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

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

Video market: Ireland

DVD retail top 10

Rank	Title	Distributor
1	Avatar	Twentieth Century Fox
2	The Twilight Saga: New Moon	Entertainment One
3	The Hangover	Warner Bros.
4	Up	Walt Disney
5	Alvin and the chipmunks:The Squealquel	Twentieth Century Fox
6	Alvin and the Chipmunks	Twentieth Century Fox
7	Toy Story 3	Walt Disney
8	The Twilight Saga: Eclipse	Entertainment One
9	Sex and the City 2	Warner Bros.
10	The Hurt Locker	Elevation

Source: BVA/Official UK Charts

Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data

Blu-ray Disc retail top 10

Rank	Title	Distributor
1	Inception	Warner Bros.
2	Toy Story 3	Walt Disney
3	Beauty and the Beast	Walt Disney
4	The Expendables	Elevation
5	The A-Team	Twentieth Century Fox
6	The Pacific: Complete Series	Warner Bros.
7	Avatar	Twentieth Century Fox
8	The Twilight Saga: Eclipse	Entertainment One
9	Harry Potter:Years 1-6	Warner Bros.
10	Sex and the City 2	Warner Bros.

Source: BVA/Official UK Charts

Notes: 1. Ranking based on retail sales by volume
2. Units sold based on available data

Retail market by genre

	% share DVD	% share Blu-ray Disc
Children's	18.3	15.9
Feature film	64.3	76.4
Music	2.1	2.1
Sport & Fitness	1.5	0.1
TV programming	11.3	5.4
Other	2.5	0.1

Source: British Video Association (BVA)

1. Shares based on retail sales by volume