

Ireland

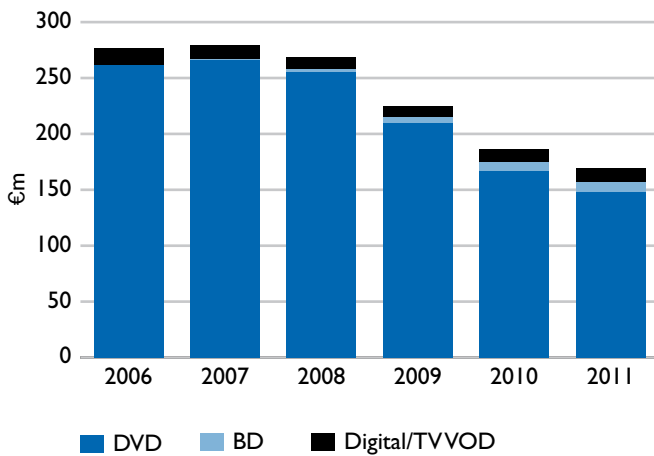
Ireland: key data

Population	4.7m
TV households	1.5m
DVD Video player/recorder	95.8%
Blu-ray Disc player/recorders penetration	7.3%
Distributor revenues from physical video software	€ 71.1m
Comparison with 2010	-12.6%
DVD/ Blu-ray Disc split	€ 65.7m / € 5.4m
Video software rental/retail split (%)	12 / 88
Consumer spending on physical video software	€ 156.9m
Comparison with 2010	-9.9%
DVD/ Blu-ray Disc split	€ 148.3m / € 8.6m
Video software rental/retail split (%)	34 / 66
Consumer spending on digital video and TV VOD	€ 12.5m
Comparison with 2010	12.2%
Digital video/TVVOD split (%)	71 / 29

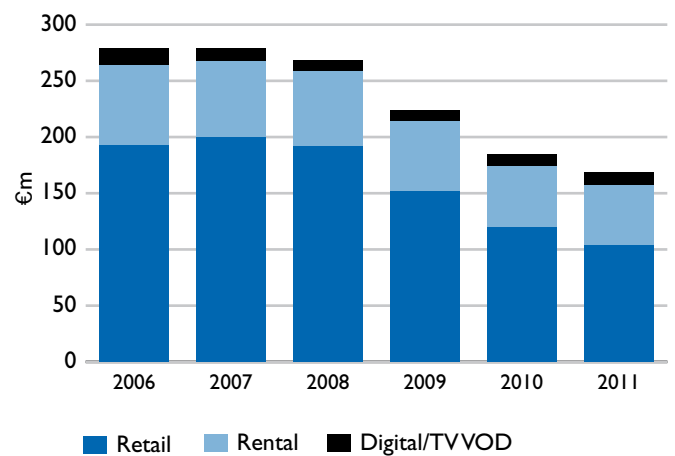


Video market: Ireland

Consumer spending by format



Consumer spending by sector



		2006	2007	2008	2009	2010	2011	10/11
EXCHANGE RATES								
Exchange rate: \$1=	Euro	0.80	0.73	0.68	0.72	0.75	0.72	
GENERAL								
Population	m	4.3	4.4	4.4	4.5	4.6	4.7	1.5%
Households	m	1.5	1.5	1.6	1.6	1.6	1.7	2.0%
HARDWARE								
TV households	m	1.38	1.41	1.43	1.46	1.48	1.51	1.8%
DVD sector								
DVD Video player/recorder households	m	0.94	1.20	1.28	1.39	1.42	1.45	1.8%
Penetration of TV households	%	67.9	84.6	89.5	95.2	95.9	95.8	
DVD console households	m	0.62	0.63	0.67	0.75	0.88	0.97	9.6%
Penetration of TV households	%	44.8	44.8	46.4	51.2	59.5	64.1	
BD sector								
BD standalone player households	m			0.004	0.03	0.05	0.11	135.3%
Penetration of TV households	%			0.3	1.8	3.1	7.3	
PS3 console households	m		0.08	0.16	0.24	0.29	0.35	18.3%
Penetration of TV households	%		5.9	11.2	16.2	19.8	23.0	

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	Euro m	129.7	134.4	128.2	103.2	81.3	71.1	-12.6%
Total revenues from retail video	Euro m	115.6	121.3	116.2	92.6	72.1	62.3	-13.7%
Total revenues from rental video	Euro m	14.1	13.0	11.9	10.6	9.2	8.8	-4.1%

Video market: Ireland

		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	Euro m	263.9	267.8	258.2	214.9	174.0	156.9	-9.9%
Total spending on retail video	Euro m	192.9	200.4	192.3	152.5	119.6	103.7	-13.3%
Total spending on rental video	Euro m	71.0	67.3	65.9	62.4	54.4	53.1	-2.3%

		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	Euro m	0.002	0.017	0.1	0.2	2.0	3.6	80.4%

		2006	2007	2008	2009	2010	2011	10/11
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	Euro m	14.6	11.8	9.6	9.9	9.1	8.9	-2.6%

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	1,650	1,650	1,600	1,450	1,250	1,100	
Retail chains with 10 or more outlets	no.	6	6	5	4	3	3	
Kiosks stocking retail video	no.							

Trade level: DVD retail

Revenues from retail DVD	Euro m	115.0	119.2	113.4	89.4	67.1	57.3	-14.7%
Retail DVD units shipped to trade	m	11.3	12.6	13.5	13.7	10.8	9.3	-13.9%
Average trade price	Euro	10.19	9.44	8.38	6.52	6.23	6.17	-0.9%
Number of titles released	no.	10,727	9,347	8,897	7,202	6,778	6,391	

Trade level: BD retail

Revenues from retail BD	Euro m		1.7	2.9	3.2	5.0	5.0	-0.6%
Retail BD units shipped to trade	m		0.08	0.14	0.2	0.3	0.3	3.2%
Average trade price	Euro		20.81	20.01	15.27	15.63	15.06	-3.7%
Number of titles released	no.		186	550	850	925	1,250	

Consumer level: DVD retail

Spending on retail DVD	Euro m	192.1	199.1	189.3	147.9	113.2	97.6	-13.8%
Retail DVDs sold to consumers	m	11.3	12.6	13.5	13.6	10.9	9.5	-13.0%
Average consumer price	Euro	17.02	15.77	14.00	10.89	10.40	10.31	-0.9%

Consumer level: BD retail

Spending on retail BD	Euro m		1.1	2.9	4.6	6.4	6.1	-4.8%
Retail BDs sold to consumers	m		0.03	0.10	0.2	0.3	0.3	5.5%
Average consumer price	Euro		33.20	28.59	22.84	22.18	20.02	-9.7%

Rental video market

		2006	2007	2008	2009	2010	2011	10/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	1,000	1,000	950	850	700	650	
Rental chains with 10 or more outlets	no.	5	5	5	4	2	2	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	14.0	13.0	11.9	10.4	9.0	8.4	-6.5%
Rental DVD units shipped to trade	m	0.65	0.61	0.59	0.54	0.50	0.49	-0.6%
Average trade price	Euro	21.54	21.41	20.25	19.16	18.13	17.04	-6.0%
Number of titles released	no.	600	417	423	405	365	383	
Trade level: BD rental								
Revenues from rental BD	Euro m				0.17	0.20	0.41	106.5%
Rental BD units shipped to trade	m				0.01	0.01	0.03	114.4%
Average trade price	Euro				15.27	15.63	15.06	-3.7%
Number of titles released	no.				162	183	192	
Consumer level: DVD rental								
Spending on DVD rental	Euro m	70.0	67.3	65.9	61.8	53.3	50.7	-4.9%
DVD rental transactions	m	15.0	14.5	14.2	13.2	11.4	10.9	-4.9%
Average rental price	Euro	4.67	4.64	4.65	4.67	4.67	4.67	
Consumer level: BD rental								
Spending on BD rental	Euro m				0.63	1.07	2.43	126.3%
BD rental transactions	m				0.14	0.23	0.52	126.3%
Average rental price	Euro				4.67	4.67	4.67	

Source: IHS Screen Digest/IVF/BVA

Population and household figures: IHS Global Insight

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

Retail market by genre

	% share all video	% share DVD	% share Blu-ray Disc
Children's	15.3	19.4	9.2
Feature film	53.7	61.4	83.4
Music	2.7	2.0	1.7
Sport & Fitness	2.4	1.9	0.6
TV programming	17.2	11.8	4.9
Other	8.8	3.5	0.2

Source: British Video Association (BVA)

Blu-ray Disc retail top 10

Rank	Title	Distributor
1	Harry Potter and the Deathly Hallows: Part 1	Warner Bros.
2	Star Wars: The Complete Saga	Twentieth Century Fox
3	Harry Potter and the Deathly Hallows: Part 2	Warner Bros.
4	Avatar	Twentieth Century Fox
5	Transformers: Dark Side of the Moon	Paramount Pictures
6	The Lion King	Walt Disney
7	Inception	Warner Bros.
8	Rise of the Planet of the Apes	Twentieth Century Fox
9	Pirates of the Caribbean: On Stranger Tides	Walt Disney
10	Tron Legacy	Walt Disney

Source: BVA/Official UK Charts

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

DVD retail top 10

Rank	Title	Distributor
1	The Guard	Element Pictures
2	The Inbetweeners Movie	Channel 4
3	Harry Potter and the Deathly Hallows: Part 1	Warner Bros.
4	Brendan Grace: It's a Great Laugh	Beaumex
5	Taken	Twentieth Century Fox
6	Despicable Me	Universal Pictures
7	Harry Potter and the Deathly Hallows: Part 2	Warner Bros.
8	The Hangover 2	Warner Bros.
9	Tangled	Walt Disney
10	Bridesmaids	Universal Pictures

Source: BVA/Official UK Charts

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