

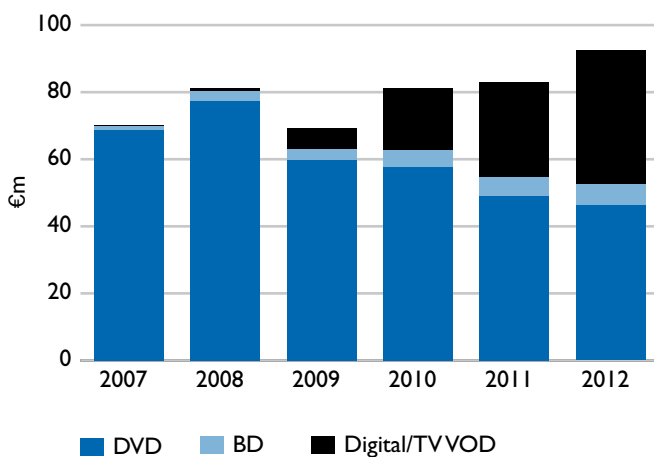
Poland

Poland: key data

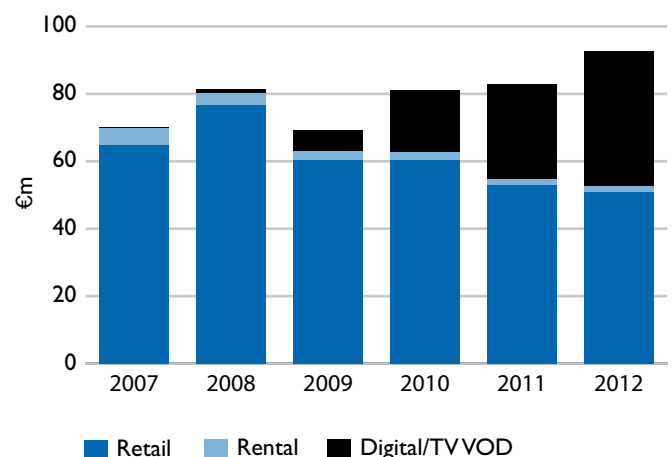
Population	37.9m
TV households	14.6m
DVD households (penetration)	51.0%
Blu-ray households (penetration)	3.1%
Distributors revenues from video software	zł 175.3m / € 41.8m
Comparison with 2011 (local currency)	-14.8%
DVD/ Blu-ray Disc split	€ 36m / € 5.9m
Video software rental/retail split (%)	3/97
Consumer spending on video software	zł 220.3m / € 52.6m
Comparison with 2011 (local currency)	-2.3%
DVD/ Blu-ray Disc split	€ 46.2m / € 6.4m
Video software rental/retail split (%)	3/97
Consumer spending on digital video and TV VOD	zł 167m / € 39.9m
Comparison with 2011 (local currency)	42.5%
Digital video/TVVOD split (%)	11 / 89



Consumer spending by format



Consumer spending by sector



		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: Euro l=	zł	3.79	3.52	4.34	4.00	4.13	4.19	
Exchange rate: \$l=	zł	2.77	2.41	3.12	3.02	2.97	3.41	
Exchange rate: \$l=	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	38.1	38.1	38.1	38.0	38.0	37.9	-0.1%
Households	m	14.3	14.4	14.5	14.6	14.7	14.8	0.6%
HARDWARE								
TV households	m	13.9	14.0	14.2	14.3	14.5	14.6	0.8%
DVD sector								
DVD Video player/recorder households	m	5.6	6.7	7.3	7.8	7.5	7.4	-0.6%
Penetration of TV households	%	40.6	47.7	51.7	54.2	51.7	51.0	
DVD console households								
Penetration of TV households	%							
BD sector								
BD standalone player households	m		0.1	0.092	0.150	0.350	0.450	28.6%
Penetration of TV households	%		0.4	0.646	1.047	2.417	3.085	
PS3 console households								
Penetration of TV households	%							

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on all video	zł m	265.6	285.7	300.7	324.6	342.7	387.3	13.0%
Total spending on all video	Euro m	70.0	81.1	69.3	81.1	83.0	92.4	11.3%

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
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	zł m	231.0	245.0	251.3	228.4	205.7	175.3	-14.8%
Total revenues from video software	Euro m	60.9	69.5	57.9	57.1	49.8	41.8	-16.0%
Total revenues from retail video	zł m	214.1	233.1	241.4	219.7	198.9	169.8	-14.6%
Total revenues from retail video	Euro m	56.4	66.2	55.7	54.9	48.2	40.5	-15.9%
Total revenues from rental video	zł m	16.9	11.9	9.9	8.7	6.8	5.5	-18.8%
Total revenues from rental video	Euro m	4.5	3.4	2.3	2.2	1.7	1.3	-20.0%

		2007	2008	2009	2010	2011	2012	12/11
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	zł m	265.1	282.7	273.0	251.6	225.5	220.3	-2.3%
Total spending on video software	Euro m	69.9	80.3	62.9	62.9	54.6	52.6	-3.8%
Total spending on retail video	zł m	246.1	270.6	262.6	242.2	218.7	213.6	-2.4%
Total spending on retail video	Euro m	64.9	76.8	60.5	60.5	53.0	51.0	-3.8%
Total spending on rental video	zł m	19.0	12.2	10.4	9.4	6.7	6.7	-0.8%
Total spending on rental video	Euro m	5.0	3.5	2.4	2.3	1.6	1.6	-2.3%

		2007	2008	2009	2010	2011	2012	12/11
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	zł m	0.0	0.2	0.4	0.5	2.2	17.7	715.1%
Total spending on digital video	Euro m	0.0	0.0	0.1	0.1	0.5	4.2	702.9%

		2007	2008	2009	2010	2011	2012	12/11
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 TVVOD	zł m	0.5	2.9	27.4	72.5	115.0	149.3	29.8%
Total spending on TVVOD	Euro m	0.1	0.8	6.3	18.1	27.9	35.6	27.8%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no.	850	850	850	850			
Retail chains with 10 or more outlets	no.							
Kiosks stocking retail video	no.	1,000	1,000	1,000	1,000			

Trade level: DVD retail								
Revenues from retail DVD	zł m	211.1	227.4	227.3	196.9	173.9	145.1	-16.5%
Revenues from retail DVD	Euro m	55.7	64.6	52.4	49.2	42.1	34.6	-17.8%
Retail DVD units shipped to trade	m	8.5	8.8	8.6	7.8	7.2	6.5	-10.3%
Average trade price	zł	24.81	25.96	26.50	25.28	24.00	22.33	-7.0%
Average trade price	Euro	6.54	7.37	6.11	6.32	5.82	5.33	-8.3%
Number of titles released	no.	815	800	785	760			

Trade level: BD retail								
Revenues from retail BD	zł m	3.0	5.7	14.1	22.8	25.0	24.6	-1.6%
Revenues from retail BD	Euro m	0.8	1.6	3.3	5.7	6.1	5.9	-3.1%
Retail BD units shipped to trade	m	0.1	0.1	0.3	0.5	0.6	0.6	11.4%
Average trade price	zł	60.00	56.50	56.47	45.50	44.74	39.50	-11.7%
Average trade price	Euro	15.82	16.04	13.02	11.37	10.84	9.43	-13.0%
Number of titles released	no.							

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Consumer level: DVD retail								
Spending on retail DVD	zł m	241.1	260.6	249.5	222.1	196.0	186.9	-4.6%
Spending on retail DVD	Euro m	63.6	74.0	57.5	55.5	47.5	44.6	-6.1%
Retail DVDs sold to consumers	m	8.3	8.5	8.5	7.7	6.9	6.7	-3.3%
Average consumer price	zł	29.22	30.65	29.39	28.85	28.50	28.10	-1.4%
Average consumer price	Euro	7.70	8.70	6.78	7.21	6.91	6.71	-2.9%

Consumer level: BD retail								
Spending on retail BD	zł m	5.0	10.0	13.1	20.1	22.8	26.7	17.4%
Spending on retail BD	Euro m	1.3	2.8	3.0	5.0	5.5	6.4	15.6%
Retail BDs sold to consumers	m	0.1	0.1	0.1	0.2	0.3	0.4	33.3%
Average consumer price	zł	99.99	99.99	98.15	94.36	84.34	74.24	-12.0%
Average consumer price	Euro	26.37	28.39	22.63	23.57	20.44	17.72	-13.3%

Rental video market

		2007	2008	2009	2010	2011	2012	12/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	1,100	1,100	1,100	1,100			
Rental chains with 10 or more outlets	no.	2	2	2	2			

Trade level: DVD rental								
Revenues from rental DVD	zł m	16.9	11.9	9.9	8.7	6.8	5.5	-18.8%
Revenues from rental DVD	Euro m	4.5	3.4	2.3	2.2	1.7	1.3	-20.0%
Rental DVD units shipped to trade	m	0.33	0.23	0.20	0.18	0.14	0.12	-16.8%
Average trade price	zł	52.07	50.82	49.60	48.41	47.25	46.12	-2.4%
Average trade price	Euro	13.73	14.43	11.44	12.09	11.45	11.01	-3.9%
Number of titles released	no.	515	400	285	185			

Consumer level: DVD rental								
Spending on DVD rental	zł m	19.0	12.2	10.4	9.4	6.7	6.7	-0.8%
Spending on DVD rental	Euro m	5.0	3.5	2.4	2.3	1.6	1.6	-2.3%
DVD rental transactions	m	3.6	2.3	2.0	1.8	1.3	1.1	-16.8%
Average rental price	zł	5.30	5.20	5.20	5.20	5.20	6.20	19.2%
Average rental price	Euro	1.40	1.48	1.20	1.30	1.26	1.48	17.5%

Source: IHS/IIVF

Population and household figures: IHS Global Insight

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