

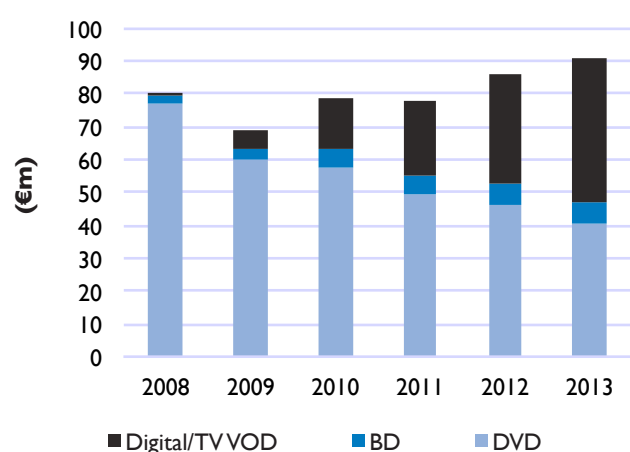
# Poland

## Poland: key data

Population	37.9m
TV households	14.7m
DVD Video player/recorder penetration	45.6%
Blu-ray Disc player/recorders penetration	9.8%
<b>Consumer spending on physical video software</b>	zł 198.9m / € 47.4m
Comparison with 2012 (local currency)	-10.2%
DVD/ Blu-ray Disc split	€ 40.6m / € 6.7m
Video software rental/retail split (%)	3 / 97
<b>Consumer spending on digital video and TV VOD</b>	zł 183.7m / € 43.8m
Comparison with 2012 (local currency)	33.6%
TVVOD/ Digital video split (%)	80 / 20



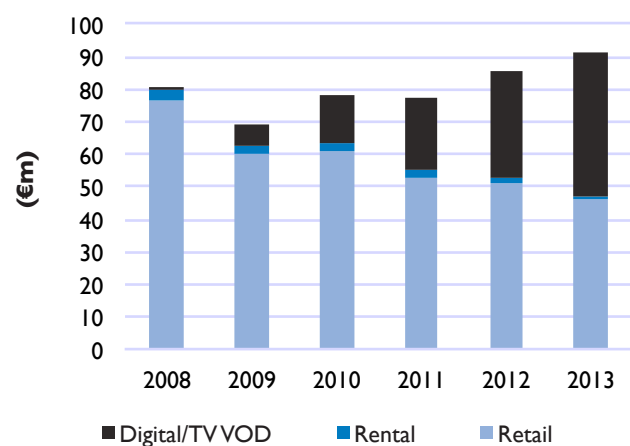
## Consumer spending by format



Source: IHS/IVF

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## Consumer spending by sector



Source: IHS/IVF

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		2008	2009	2010	2011	2012	2013	12/13
<b>EXCHANGE RATES</b>								
Exchange rate: Euro l=	zl	3.54	4.35	4.00	4.13	4.18	4.20	
Exchange rate: \$l=	zl	2.41	3.12	3.02	2.96	3.26	3.16	
Exchange rate: \$l=	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
<b>GENERAL</b>								
Population	m	38.1	38.1	38.0	38.0	37.9	37.9	-0.1%
Households	m	14.4	14.5	14.6	14.7	14.8	14.9	0.5%
<b>HARDWARE</b>								
TV households	m	14.0	14.2	14.3	14.5	14.6	14.7	0.7%
<b>DVD sector</b>								
DVD Video player/recorder households	m	6.7	7.3	7.8	7.5	7.4	6.7	-9.9%
Penetration of TV households	%	47.7	51.7	54.2	51.7	51.0	45.6	-10.5%
<b>DVD console households</b>								
Penetration of TV households	%							
<b>BD sector</b>								
BD standalone player households	m	0.050	0.092	0.150	0.350	0.450	1.434	218.7%
Penetration of TV households	%	0.4	0.6	1.0	2.4	3.1	9.8	216.5%
<b>PS3 console households</b>								
Penetration of TV households	%							

## Total video software market

		2008	2009	2010	2011	2012	2013	12/13
<b>CONSUMER LEVEL ALL VIDEO</b>								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	zl m	285.7	300.4	313.3	320.7	358.9	382.6	6.6%
Total spending on video	Euro m	80.6	69.0	78.4	77.7	85.8	91.1	6.2%

## Video market: Poland

		2008	2009	2010	2011	2012	2013	12/13
<b>CONSUMER LEVEL PHYSICAL VIDEO</b>								
<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	282.6	273.4	252.1	226.4	221.4	198.9	-10.2%
Total spending on video software	Euro m	79.8	62.8	63.1	54.9	52.9	47.4	-10.4%
Total spending on retail video	zł m	270.2	262.6	242.2	218.7	213.6	192.1	-10.1%
Total spending on retail video	Euro m	76.3	60.3	60.6	53.0	51.0	45.8	-10.3%
Total spending on rental video	zł m	12.4	10.9	9.9	7.6	7.8	6.8	-13.1%
Total spending on rental video	Euro m	3.5	2.5	2.5	1.9	1.9	1.6	-13.4%

		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>								
<b>CONSUMER LEVEL DIGITAL VIDEO</b>								
<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	0.17	0.38	0.47	2.29	17.64	36.50	106.9%
Total spending on digital video	Euro m	0.05	0.09	0.12	0.55	4.22	8.69	106.3%

		2008	2009	2010	2011	2012	2013	12/13
<b>CONSUMER LEVEL TV VOD</b>								
<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	2.9	26.6	60.7	92.0	119.9	147.2	22.8%
Total spending on TVVOD	Euro m	0.8	6.1	15.2	22.3	28.6	35.1	22.4%

## Retail video market

		2008	2009	2010	2011	2012	2013	12/13
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			

		2008	2009	2010	2011	2012	2013	12/13
<b>Consumer level: DVD retail</b>								
Spending on retail DVD	zł m	260.2	249.5	222.1	196.0	186.9	164.9	-11.7%
Spending on retail DVD	Euro m	73.4	57.3	55.6	47.5	44.7	39.3	-12.0%
Retail DVDs sold to consumers	m	8.50	8.49	7.70	6.88	6.65	6.30	-5.2%
Average consumer price	zł	30.6	29.4	28.9	28.5	28.1	26.2	-6.9%
Average consumer price	Euro	8.64	6.75	7.22	6.91	6.72	6.23	-7.2%

		2008	2009	2010	2011	2012	2013	12/13
<b>Consumer level: BD retail</b>								
Spending on retail BD	zł m	10.00	13.06	20.10	22.77	26.73	27.18	1.7%
Spending on retail BD	Euro m	2.82	3.00	5.03	5.52	6.39	6.47	1.4%
Retail BDs sold to consumers	m	0.100	0.133	0.213	0.270	0.360	0.439	22.0%
Average consumer price	zł	100.0	98.2	94.4	84.3	74.2	61.9	-16.7%
Average consumer price	Euro	28.22	22.55	23.61	20.44	17.74	14.74	-16.9%

## 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.	1,100	1,100	1,100				
Rental chains with 10 or more outlets	no.	2	2	2				
<b>Consumer level: DVD rental</b>								
Spending on DVD rental	zl m	12.2	10.4	9.4	6.7	6.7	5.6	-15.7%
Spending on DVD rental	Euro m	3.4	2.4	2.3	1.6	1.6	1.3	-16.0%
DVD rental transactions	m	2.3	2.0	1.8	1.3	1.1	0.9	-15.0%
Average rental price	zl	5.2	5.2	5.2	5.2	6.2	6.2	-0.8%
Average rental price	Euro	1.47	1.19	1.30	1.26	1.48	1.47	-1.1%
<b>Consumer level: BD rental</b>								
Spending on BD rental	zl m	0.26	0.47	0.52	0.89	1.12	1.14	2.3%
Spending on BD rental	Euro m	0.07	0.11	0.13	0.22	0.27	0.27	2.0%
BD rental transactions	m	0.05	0.09	0.10	0.17	0.18	0.19	3.1%
Average rental price	zl	5.20	5.20	5.20	5.20	6.20	6.15	-0.8%
Average rental price	Euro	1.47	1.19	1.30	1.26	1.48	1.47	-1.1%
Average rental price	Euro	1.40	1.48	1.20	1.30	1.26	1.48	17.5%

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 TV VOD figures may differ from locally published figures due to the application of different definitions.