

# Poland

## Poland: key data

Population	38.2m
TV households	14.2m
DVD households (penetration)	47.4%
Blu-ray households (penetration)	2.5%
<b>Distributors revenues from physical video software</b>	zł 230.3m / € 57.5m
Comparison with 2009 (local currency)	-6.9%
DVD/ Blu-ray Disc split	€ 51.4m / € 6.2m
Video software rental/retail split (%)	4/96
<b>Consumer spending on physical video software</b>	zł 248.3m / € 62m
Comparison with 2009 (local currency)	-9.0%
DVD/ Blu-ray Disc split	€ 56.1m / € 6m
Video software rental/retail split (%)	4/96



## DVD and Blu-ray market

DVD player penetration in Poland increased to 47 per cent in 2010, reflecting an installed base of 6.8 million households. Adoption of Blu-ray Disc (BD) players in Poland has so far been slow with a penetration rate at just 2.5 per cent, the equivalent of 361,000 households.

## Retail

DVD shipments continued to decline in 2010, down by 9.2 per cent to 7.8 million units. The average trade price of a DVD also declined by 4.6 per cent to zł 25.28 (EUR 6.32). As a result, distributor revenue from retail DVD fell by 13.3 per cent to zł 196.9 million (EUR 49.2 million). Polish consumers purchased 7.7 million DVDs in 2010, a decline of 9.3 per cent year-on-year. The average consumer price per disc dropped 4.1 per cent, to zł 27.92 (EUR 6.98) and reduced spending on DVD by 13 per cent to zł 215 million.

At the same time, consumers spent zł 23.8 million on buying 250,000 Blu-ray Discs. Blu-ray Disc now accounted for 10 per cent of video retail spending, but only 3.2 per cent of video sales by volume.

Finally, there were still some lingering VCD sales in Poland. However, sales were typically back catalogue titles sold cheaply with newspapers.

## Rental

Poland's video rental market continued to decline, although the rate of decline had slowed down in recent years. Distributor revenues from DVD rental fell by 12.2 per cent to zł 8.71 million (EUR 2.2 million) reflecting a 10 per cent decrease in DVD rental transactions to 1.8 million.

BD rental is taking off slowly. So far the format accounted for less than 0.5 per cent of video rental in Poland according to IHS Screen Digest analysis.

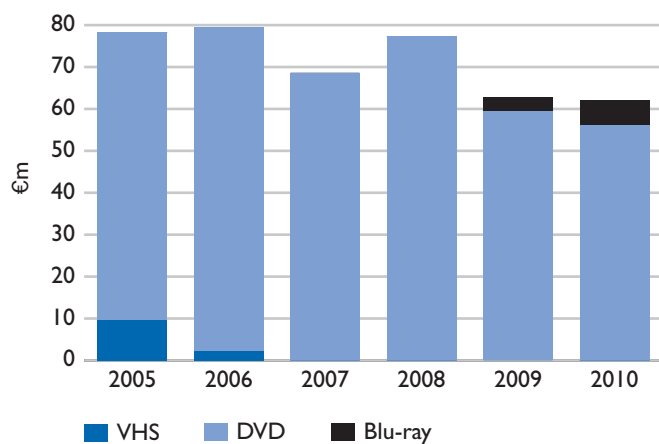
## Online distribution

There are a number of digital distribution services in Poland, including local operators iPlex and Cineman. When it comes to VOD, the key players are UPC and Astra.

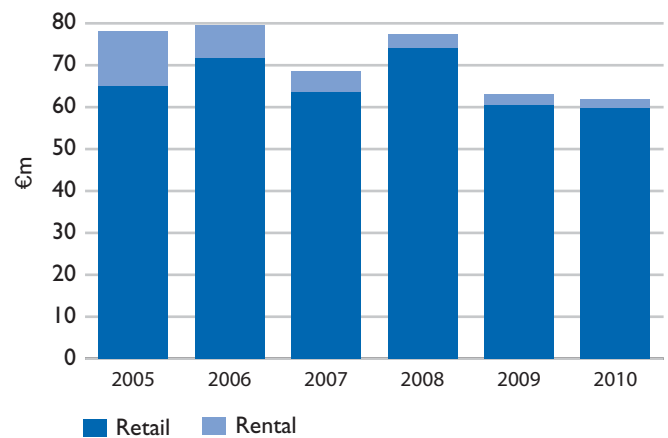
*This commentary was provided by IHS Screen Digest.*

## Video market: Poland

### Consumer spending by format



### Consumer spending by sector



		2005	2006	2007	2008	2009	2010	10/09
<b>EXCHANGE RATES</b>								
Exchange rate: Euro   =	zł	4.03	3.91	3.79	3.52	4.34	4.00	
Exchange rate: \$   =	zł	3.24	3.11	2.77	2.41	3.12	3.02	
Exchange rate: \$   =	Euro	0.80	0.80	0.73	0.68	0.72	0.75	
<b>GENERAL</b>								
Population	m	38.17	38.14	38.12	38.11	38.16	38.21	0.1%
Households	m	13.58	13.65	13.72	13.77	13.82	13.90	0.6%
<b>HARDWARE</b>								
TV households	m	13.5	13.7	13.9	14.0	14.1	14.2	0.8%
<b>DVD sector</b>								
DVD Video player/recorder households	m	3.2	4.0	4.8	5.6	6.1	6.8	10.5%
Penetration of TV households	%	23.6	29.3	34.7	40.1	43.3	47.4	
<b>DVD console households</b>								
Penetration of TV households	%							
<b>BD sector</b>								
BD standalone player households	m				0.004	0.073	0.361	396.2%
Penetration of TV households	%				0.029	0.515	2.532	
<b>PS3 console households</b>								
Penetration of TV households	%							

### Total video software market

		2005	2006	2007	2008	2009	2010	10/09
<b>TRADE LEVEL PHYSICAL VIDEO</b>								
Total revenues from video software	zł m	239.6	230.0	228.0	239.3	247.5	230.3	-6.9%
Total revenues from video software	Euro m	59.5	58.9	60.1	67.9	57.1	57.5	0.8%
Total revenues from retail video	zł m	201.6	209.1	211.1	227.4	237.6	221.6	-6.7%
Total revenues from retail video	Euro m	50.0	53.5	55.7	64.6	54.8	55.4	1.1%
Total revenues from rental video	zł m	38.0	20.9	16.9	11.9	9.9	8.7	-12.2%
Total revenues from rental video	Euro m	9.4	5.4	4.5	3.4	2.3	2.2	-4.8%

## Video market: Poland

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL PHYSICAL VIDEO</b>								
Total spending on video software	zł m	315.3	310.5	260.1	272.7	273.0	248.3	-9.0%
Total spending on video software	Euro m	78.3	79.5	68.6	77.4	62.9	62.0	-1.4%
Total spending on retail video	zł m	261.6	279.8	241.1	260.6	262.6	238.9	-9.0%
Total spending on retail video	Euro m	64.9	71.6	63.6	74.0	60.5	59.7	-1.4%
Total spending on rental video	zł m	53.6	30.7	19.0	12.2	10.4	9.4	-10.0%
Total spending on rental video	Euro m	13.3	7.9	5.0	3.5	2.4	2.3	-2.5%

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL DIGITAL VIDEO*</b>								
Total spending on digital video	zł m			0.0	0.2	0.3	0.5	57.2%
Total spending on digital video	Euro m			0.0	0.0	0.1	0.1	70.3%

		2005	2006	2007	2008	2009	2010	10/09
<b>CONSUMER LEVEL TV VOD**</b>								
Total spending on TV VOD	zł m		0.1	1.4	5.1	15.3	57.8	277.1%
Total spending on TV VOD	Euro m		0.0	0.4	1.4	3.5	14.4	308.6%

\*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/NVoD/PPV) basis via cable/satellite/IPTV services.

### Retail video market

		2005	2006	2007	2008	2009	2010	10/09
Outlets stocking retail video	no	850	850	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	1,000	1,000	

<b>Trade level: DVD retail</b>								
Revenues from retail DVD	zł m	187.1	209.1	211.1	227.4	227.3	196.9	-13.3%
Revenues from retail DVD	Euro m	46.4	53.5	55.7	64.6	52.4	49.2	-6.1%
Retail DVD shipped to trade	m	5.8	7.4	8.5	8.8	8.6	7.8	-9.2%
Average trade price	zł	32.31	28.27	24.81	25.96	26.50	25.28	-4.6%
Average trade price	Euro	8.02	7.24	6.54	7.37	6.11	6.32	3.4%
Number of titles released	no	700	850	815	800	785	760	-3.2%

<b>Trade level: BD retail</b>								
Revenues from retail BD	zł m					10.3	24.7	
Revenues from retail BD	Euro m					2.4	6.2	
Retail BD shipped to trade	m					0.2	0.5	
Average trade price	zł					56.47	49.35	
Average trade price	Euro					13.02	12.33	

<b>Consumer level: DVD retail</b>								
Spending on retail DVD	zł m	244.7	276.4	241.1	260.6	247.2	215.0	-13.0%
Spending on retail DVD	Euro m	60.7	70.8	63.6	74.0	57.0	53.7	-5.8%
Retail DVD sold to consumers	m	5.5	7.1	8.3	8.5	8.5	7.7	-9.3%
Average consumer price	zł	44.49	38.93	29.22	30.65	29.12	27.92	-4.1%
Average consumer price	Euro	11.04	9.97	7.70	8.70	6.71	6.98	3.9%

<b>Consumer level: BD retail</b>								
Spending on retail BD	zł m					15.3	23.9	
Spending on retail BD	Euro m					3.5	6.0	
Retail BD sold to consumers	m					0.2	0.3	
Average consumer price	zł					98.52	93.19	
Average consumer price	Euro					22.71	23.28	

Rental video market

		2005	2006	2007	2008	2009	2010	10/09
Video rental outlets	no	1,200	1,200	1,100	1,100	1,100	1,100	
Rental chains with 10 or more outlets	no	3	3	2	2	2	2	
<b>Trade level: DVD rental</b>								
Revenues from rental DVD	zl m	26.7	20.9	16.9	11.9	9.9	8.7	-12.2%
Revenues from rental DVD	Euro m	6.6	5.4	4.5	3.4	2.3	2.2	-4.8%
Rental DVD shipped to trade	m	0.48	0.39	0.33	0.23	0.20	0.18	-10.0%
Average trade price	zl	55.69	53.35	52.07	50.82	49.60	48.41	-2.4%
Average trade price	Euro	13.82	13.66	13.73	14.43	11.44	12.09	5.8%
Number of titles released	no	625	600	515	400	285	185	-35.1%
<b>Trade level: BD rental</b>								
Revenues from rental BD	zl m							
Revenues from rental BD	Euro m							
Rental BD shipped to trade	m							
Average trade price	zl							
Average trade price	Euro							
Number of titles released	no							
<b>Consumer level: DVD rental</b>								
Spending on DVD rental	zl m	31.6	25.5	19.0	12.2	10.4	9.4	-10.0%
Spending on DVD rental	Euro m	7.8	6.5	5.0	3.5	2.4	2.3	-2.5%
DVD rental transactions	m	5.8	4.7	3.6	2.3	2.0	1.8	-10.0%
Average rental price	zl	5.49	5.42	5.30	5.20	5.20	5.20	
Average rental price	Euro	1.36	1.39	1.40	1.48	1.20	1.30	8.4%
<b>Consumer level: BD rental</b>								
Spending on BD rental	zl m							
Spending on BD rental	Euro m							
BD rental transactions	m							
Average rental price	zl							
Average rental price	Euro							

Source: IHS Screen Digest/IVF

Population and household figures: Economist Intelligence Unit

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