

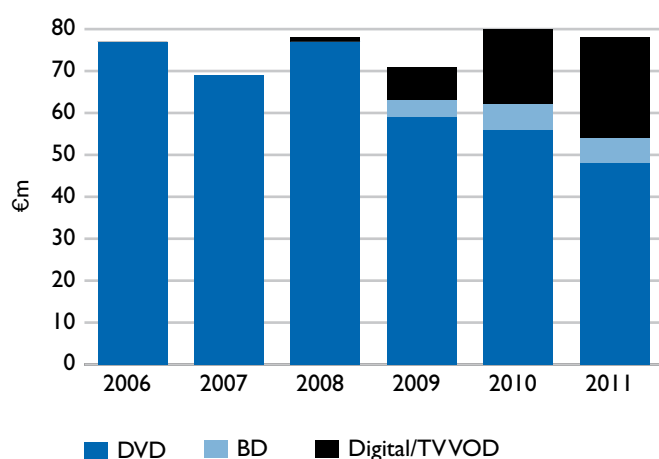
Poland

Poland: key data

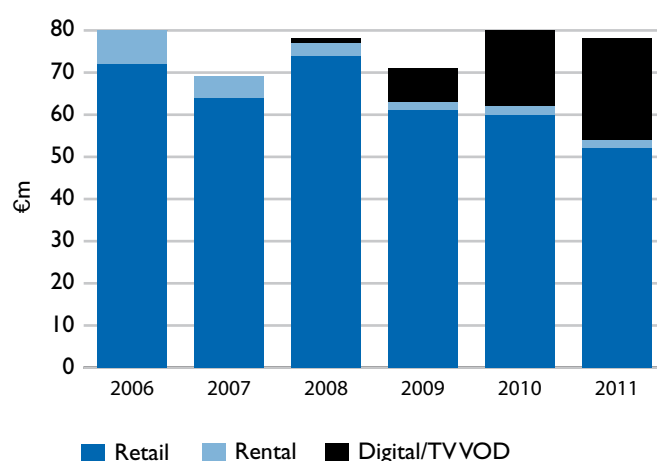
Population	38m
TV households	14.5m
DVD Video player/recorder	45.2%
Blu-ray Disc player/recorders penetration	6.2%
Distributor revenues from physical video software	zł 208.1m / € 50.4m
Comparison with 2010 (local currency)	-9.7%
DVD/ Blu-ray Disc split	€ 43.9m / € 6.6m
Video software rental/retail split (%)	3 / 97
Consumer spending on physical video software	zł 222m / € 53.8m
Comparison with 2010 (local currency)	-10.6%
DVD/ Blu-ray Disc split	€ 47.7m / € 6.1m
Video software rental/retail split (%)	3 / 97
Consumer spending on digital video and TV VOD	zł 99.9m / € 24.2m
Comparison with 2010 (local currency)	38.3%
Digital video/TVVOD split (%)	98 / 2



Consumer spending by format



Consumer spending by sector



		2006	2007	2008	2009	2010	2011	10/11
EXCHANGE RATES								
Exchange rate: Euro l=	zl	3.91	3.79	3.52	4.34	4.00	4.13	
Exchange rate: \$l=	zl	3.11	2.77	2.41	3.12	3.02	2.97	
Exchange rate: \$l=	Euro	0.80	0.73	0.68	0.72	0.75	0.72	
GENERAL								
Population	m	38.2	38.1	38.1	38.1	38.0	38.0	-0.1%
Households	m	14.1	14.3	14.4	14.5	14.6	14.7	0.6%
HARDWARE								
TV households	m	13.7	13.9	14.0	14.2	14.3	14.5	1.0%
DVD sector								
DVD Video player/recorder households	m	4.0	4.8	5.6	6.1	6.3	6.6	3.7%
Penetration of TV households	%	29.3	34.7	40.1	43.3	44.1	45.2	
DVD console households								
Penetration of TV households	%							
BD sector								
BD standalone player households	m			0.004	0.092	0.368	0.896	143.6%
Penetration of TV households	%			0.0	0.6	2.6	6.2	
PS3 console households								
Penetration of TV households	%							

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	zl m	233.0	228.0	239.4	247.5	230.4	208.1	-9.7%
Total revenues from video software	Euro m	59.6	60.1	68.0	57.1	57.6	50.4	-12.4%
Total revenues from retail video	zl m	212.0	211.1	227.4	237.6	221.6	201.0	-9.3%
Total revenues from retail video	Euro m	54.3	55.7	64.6	54.8	55.4	48.7	-12.0%
Total revenues from rental video	zl m	20.9	16.9	11.9	10.0	8.8	7.2	-18.4%
Total revenues from rental video	Euro m	5.4	4.5	3.4	2.3	2.2	1.7	-20.8%

Video market: Poland

		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	zł m	310.5	260.1	272.7	273.0	248.3	222.0	-10.6%
Total spending on video software	Euro m	79.5	68.6	77.4	62.9	62.0	53.8	-13.3%
Total spending on retail video	zł m	279.8	241.1	260.6	262.6	238.9	215.2	-9.9%
Total spending on retail video	Euro m	71.6	63.6	74.0	60.5	59.7	52.2	-12.6%
Total spending on rental video	zł m	30.7	19.0	12.2	10.4	9.4	6.8	-28.0%
Total spending on rental video	Euro m	7.9	5.0	3.5	2.4	2.3	1.6	-30.2%

		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	zł m		0.02	0.16	0.33	0.51	1.67	223.5%
Total spending on digital video	Euro m		0.01	0.05	0.08	0.13	0.40	213.8%

		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 TVVOD	zł m	0.015	0.863	4.5	33.4	71.7	98.2	36.9%
Total spending on TVVOD	Euro m	0.004	0.227	1.3	7.7	17.9	23.8	32.8%

Retail video market

		2006	2007	2008	2009	2010	2011	10/11
Outlets stocking retail video	no.	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		

Trade level: DVD retail

Revenues from retail DVD	zł m	209.1	211.1	227.4	227.3	196.9	173.9	-11.7%
Revenues from retail DVD	Euro m	53.5	55.7	64.6	52.4	49.2	42.1	-14.3%
Retail DVD units shipped to trade	m	7.4	8.5	8.8	8.6	7.8	7.2	-7.0%
Average trade price	zł	28.3	24.8	26.0	26.5	25.3	24.0	-5.1%
Average trade price	Euro	7.24	6.54	7.37	6.11	6.32	5.82	-7.9%
Number of titles released	no.	850	815	800	785	760		

Trade level: BD retail

Revenues from retail BD	zł m				10.32	24.68	27.08	9.7%
Revenues from retail BD	Euro m				2.380	6.164	6.561	6.4%
Retail BD units shipped to trade	m				0.183	0.500	0.559	11.8%
Average trade price	zł				56.5	49.4	48.4	-1.9%
Average trade price	Euro				13.02	12.33	11.74	-4.8%
Number of titles released	no.							

Consumer level: DVD retail

Spending on retail DVD	zł m	276.4	241.1	260.6	247.2	215.0	190.1	-11.6%
Spending on retail DVD	Euro m	70.8	63.6	74.0	57.0	53.7	46.1	-14.2%
Retail DVDs sold to consumers	m	7.10	8.25	8.50	8.49	7.70	6.88	-10.7%
Average consumer price	zł	38.9	29.2	30.7	29.1	27.9	27.7	-1.0%
Average consumer price	Euro	9.97	7.70	8.70	6.71	6.98	6.70	-3.9%

Consumer level: BD retail

Spending on retail BD	zł m				15.31	23.89	25.09	5.0%
Spending on retail BD	Euro m				3.53	5.97	6.08	1.9%
Retail BDs sold to consumers	m				0.155	0.213	0.270	26.8%
Average consumer price	zł				98.5	112.2	92.9	-17.2%
Average consumer price	Euro				22.71	28.03	22.52	-19.6%

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.	1,200	1,100	1,100	1,100	1,100		
Rental chains with 10 or more outlets	no.	3	2	2	2	2		

Trade level: DVD rental

Revenues from rental DVD	zł m	20.9	16.9	11.9	9.9	8.7	7.2	-17.8%
Revenues from rental DVD	Euro m	5.4	4.5	3.4	2.3	2.2	1.7	-20.3%
Rental DVD units shipped to trade	m	0.39	0.33	0.23	0.20	0.18	0.14	-19.9%
Average trade price	zł	53.4	52.1	50.8	49.6	48.4	49.7	2.6%
Average trade price	Euro	13.66	13.73	14.43	11.44	12.09	12.03	-0.5%
Number of titles released	no.	600	515	400	285	185		

Trade level: BD rental

Revenues from rental BD	zł m			0.030	0.05	0.06		
Revenues from rental BD	Euro m			0.009	0.010	0.015		
Rental BD units shipped to trade	m							
Average trade price	zł			150.0	150.0	150.0		
Average trade price	Euro			42.58	34.58	37.47		
Number of titles released	no.							

Consumer level: DVD rental

Spending on DVD rental	zł m	25.5	19.0	12.2	10.4	9.4	6.8	-27.9%
Spending on DVD rental	Euro m	6.5	5.0	3.5	2.4	2.3	1.6	-30.0%
DVD rental transactions	m	4.7	3.6	2.3	2.0	1.8	1.3	-27.9%
Average rental price	zł	5.4	5.3	5.2	5.2	5.2	5.2	
Average rental price	Euro	1.39	1.40	1.48	1.20	1.30	1.26	-3.0%

Consumer level: BD rental

Spending on BD rental	zł m		0.006	0.010	0.016	0.021		
Spending on BD rental	Euro m		0.002	0.003	0.004	0.005		
BD rental transactions	m		0.001	0.002	0.003	0.004		
Average rental price	zł		5.30	5.20	5.20	5.20		
Average rental price	Euro		1.40	1.48	1.20	1.30		

Source: IHS Screen Digest/IVF

Population and household figures: IHS Global Insight

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