Der Videomarkt 2012

GfK Consumer Panel

Methodensteckbrief Stand Januar 2013

Befragungsinhalt	Erfassung aller Einkäufen/Leihvorgängen von Videos (alle Formate inkl. digital), von deutschen Privatpersonen ab 10 Jahren.
Befragungsmethode	Schriftlich (ca. 60% Online (Anteil steigend), ca. 40% Paper & Pencil) in Form eines Tagebuchs, das von den Panelteilnehmern selbst kontinuierlich geführt wird.
Hochrechnung	Die Ergebnisse werden auf die Grundgesamtheit (Stand 2012: 67,8 Mio.) der deutschen Bevölkerung ab 10 Jahre hochgerechnet
Stichprobe	Kontinuierliches Panel von 25.000 deutschen Einzelpersonen ab 10 Jahren (brutto, Stand 2013).

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Wirtschaftliche Rahmendaten

Fazit für das Jahr 2012 – Ausblick 2013

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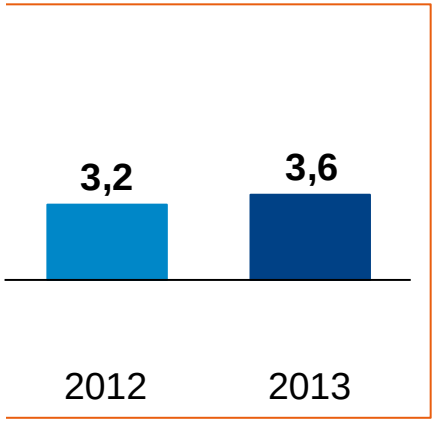
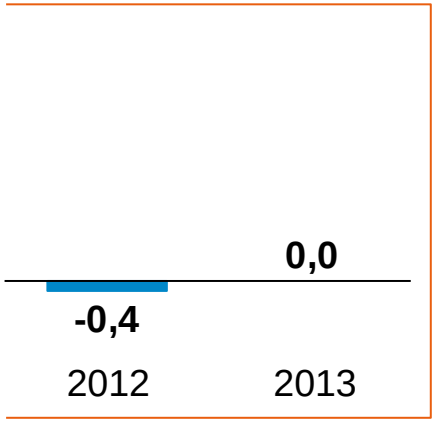
Entwicklung der Weltwirtschaft – Leichte Erholung 2013 dank der Schwellenländer

Veränderung des realen Bruttoinlandsprodukts vs. Vorjahr [in %]

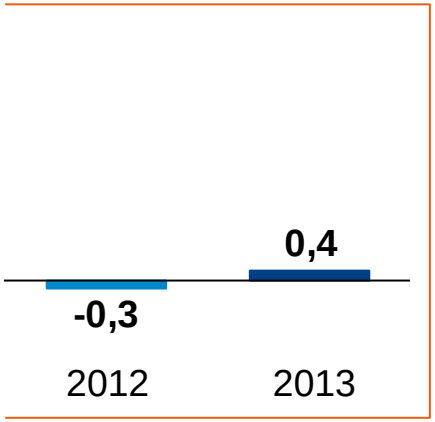
Weltwirtschaft



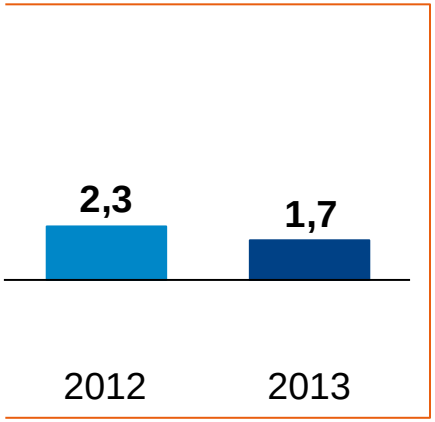
Euroraum



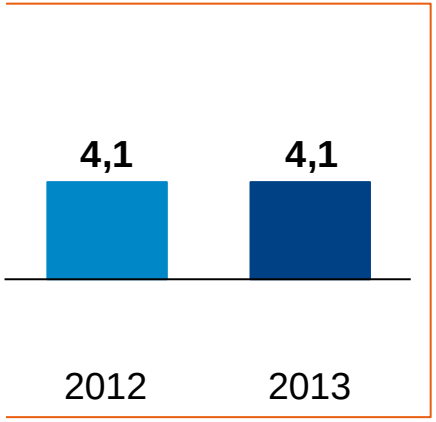
Großbritannien



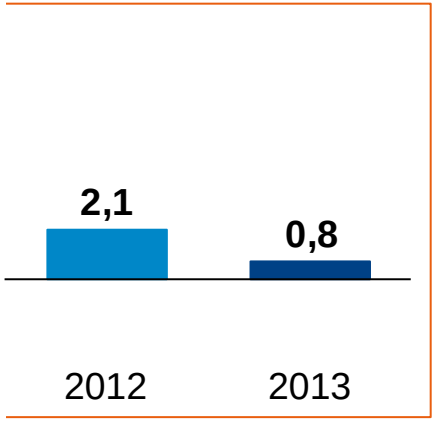
USA



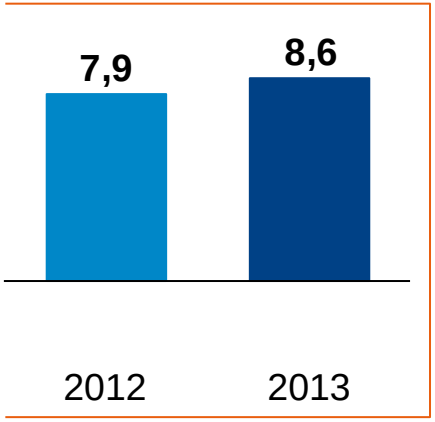
Russland



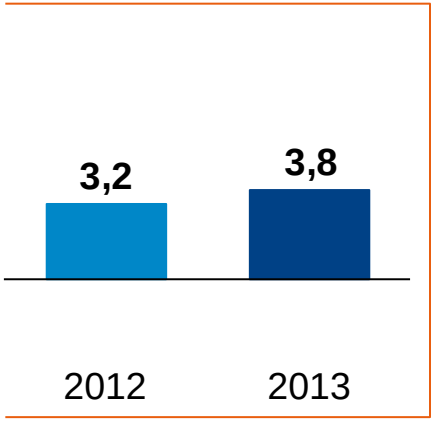
Japan



China



Indien



Quelle: DIW (Stand: 09.01.2013)

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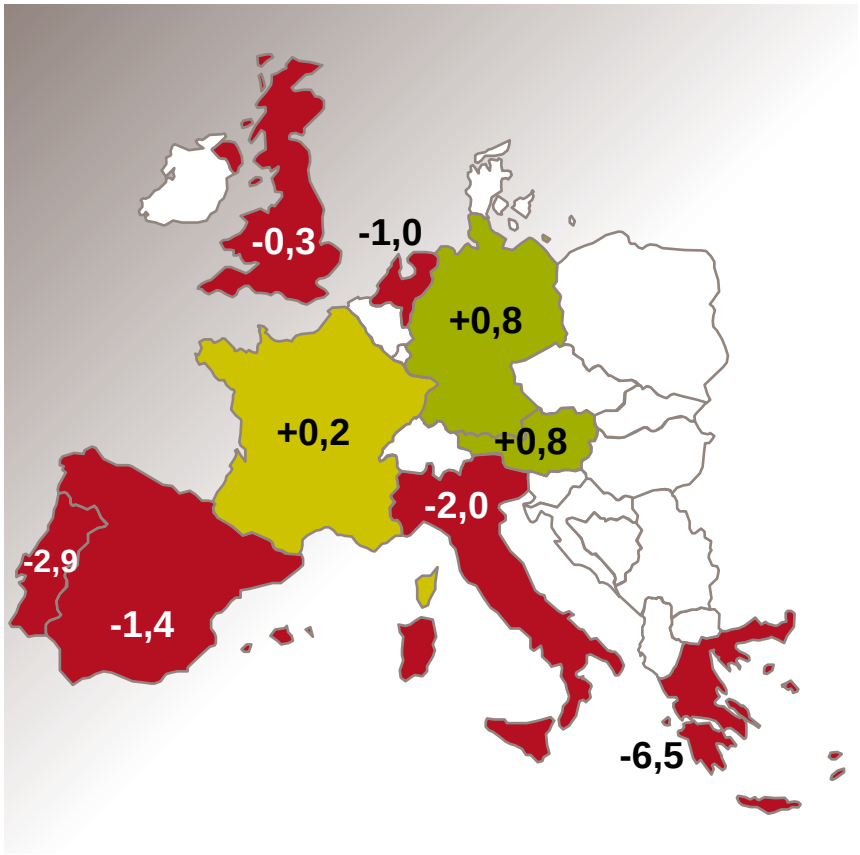
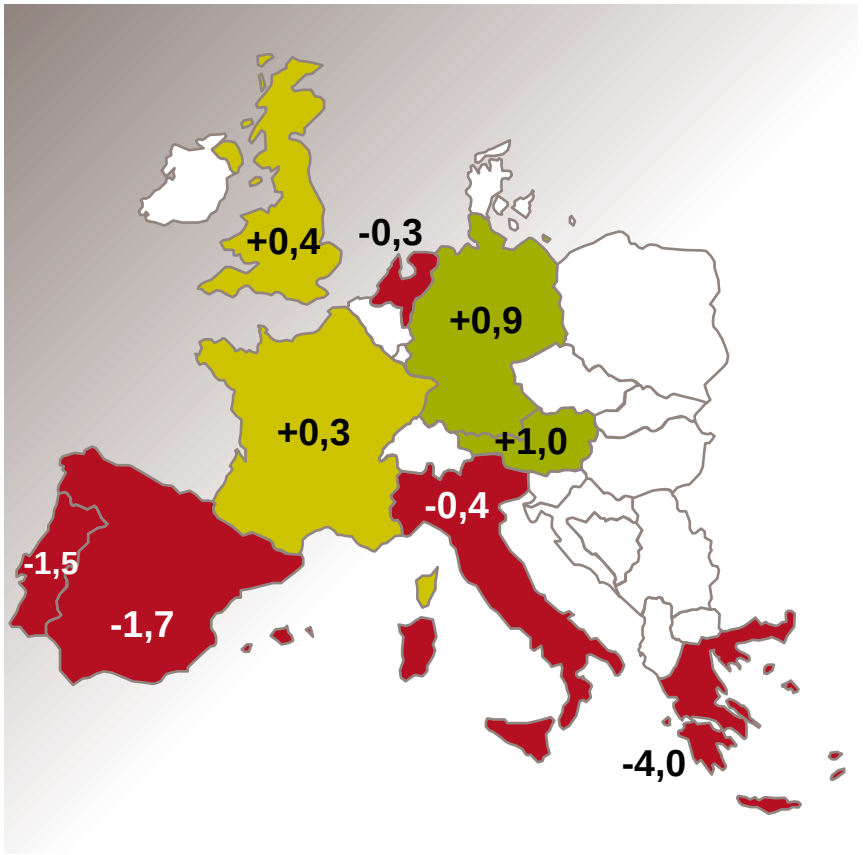
Deutschland in Westeuropa beim Wirtschaftswachstum führend – Sowohl 2012 als auch 2013

Veränderung des realen Bruttoinlandsprodukts vs. Vorjahr [in %]

2012



2013



Quelle: DIW (Stand: 09.01.2013) | P, A, GR: Projektgruppe Gemeinschaftsdiagnose Herbst (Stand: 11.10.2012)

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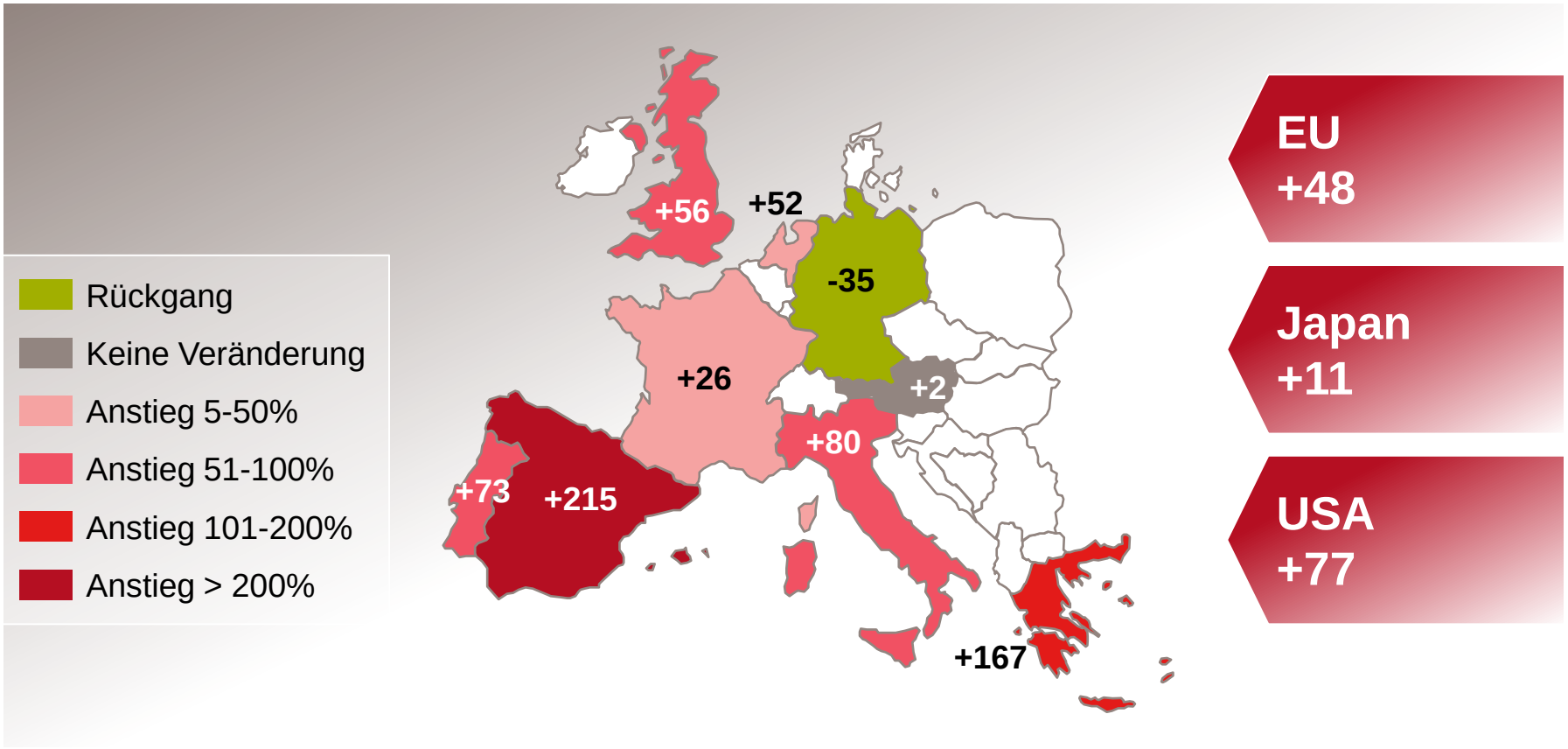
Der positive Arbeitsmarkt stützt die Konjunktur in Deutschland

Änderung der Zahl der Arbeitslosen von 2007 bis 2012

Angaben [in %]



Quelle: GfK, Eurostat, harmonisierte Werte, 2012: Jan-Nov

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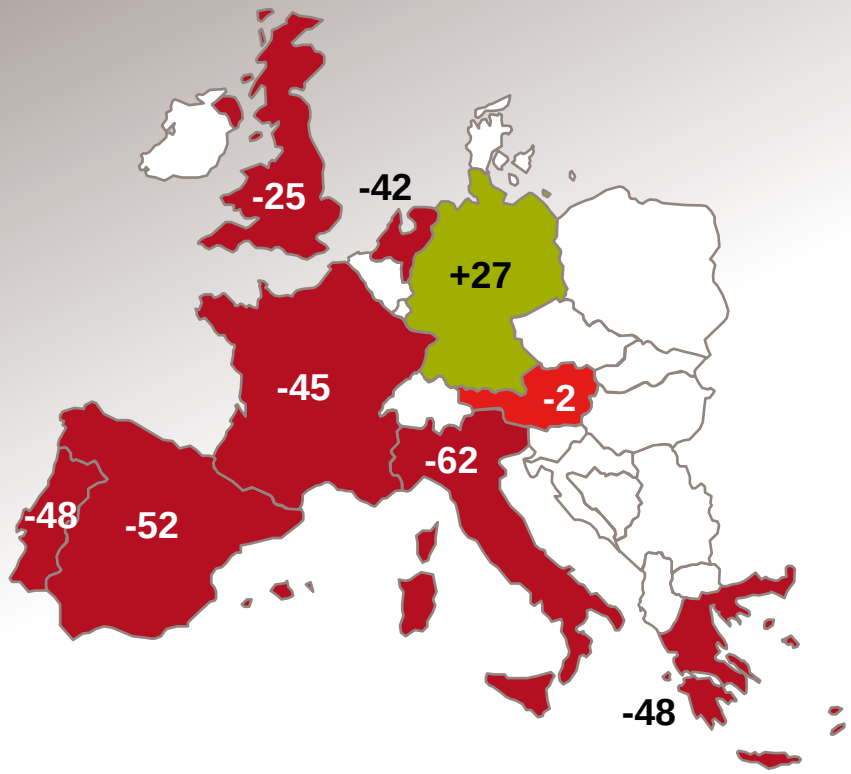
Einkommensaussichten in Europa deutlich negativ – Deutschland mit absoluter Ausnahmestellung

Einkommenserwartung

Durchschnitt 2. Halbjahr 2012



EU Gesamt
-52

Quelle: GfK, EU-Kommission

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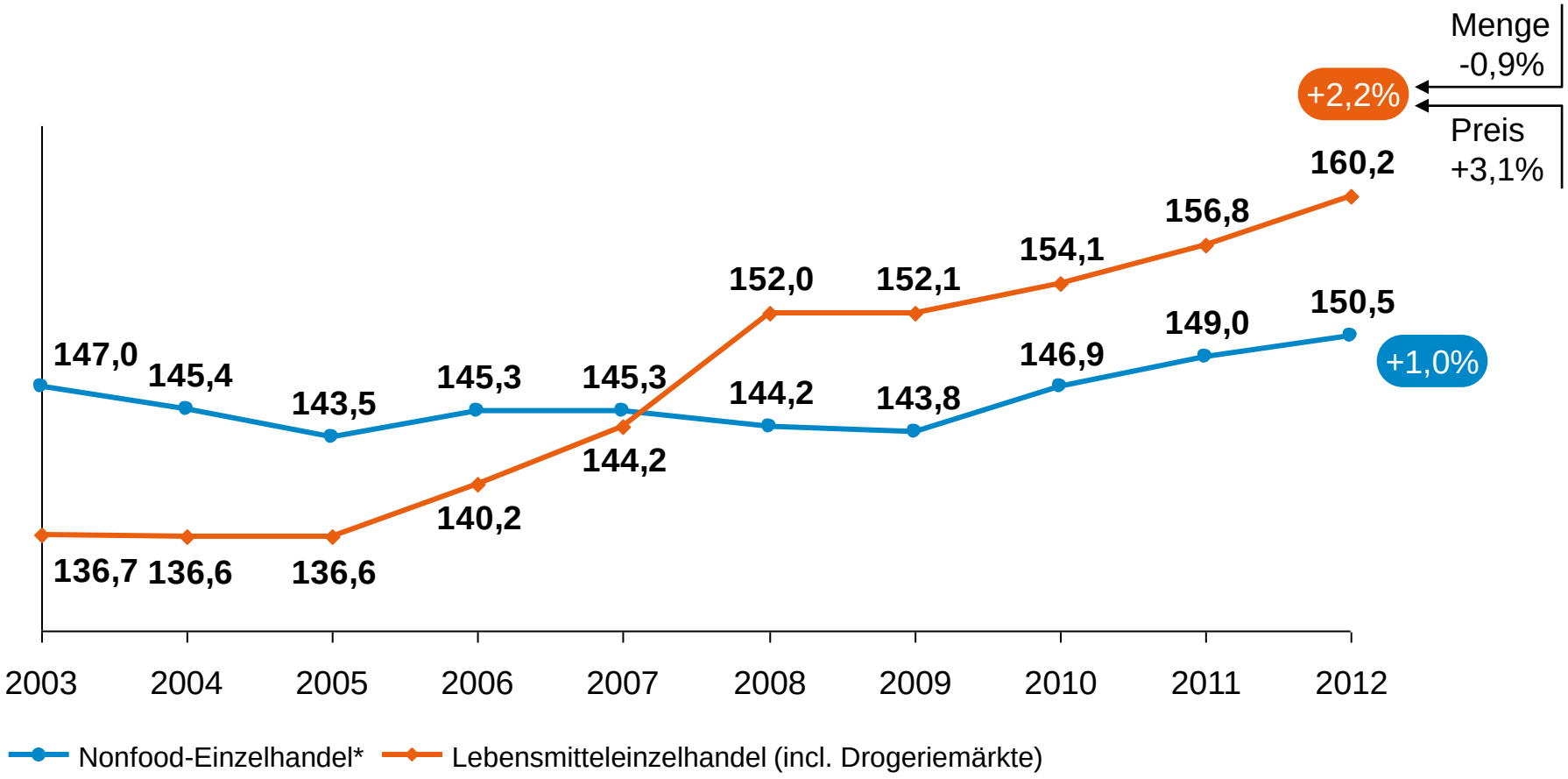
LEH auf Wachstumskurs – Durchwachsene Umsatzentwicklung im Nonfood-Einzelhandel

Umsatz [in Mrd. EUR]



Quellen: Grundgesamtheiten SymphonyIRI Group,
GfK ConsumerScope (*Nonfood: Elektro/Textil/Hartwaren/DIY, excl. Tierbedarf/Münzen; 2012: Prognose),
GfK ConsumerScan (LEH 2012: eigene Berechnungen Basis Haushaltspanel, Bonsumme FMCG incl. Frische)

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Entwicklung Home Video & Cinema

Bestes Umsatzergebnis in der Geschichte

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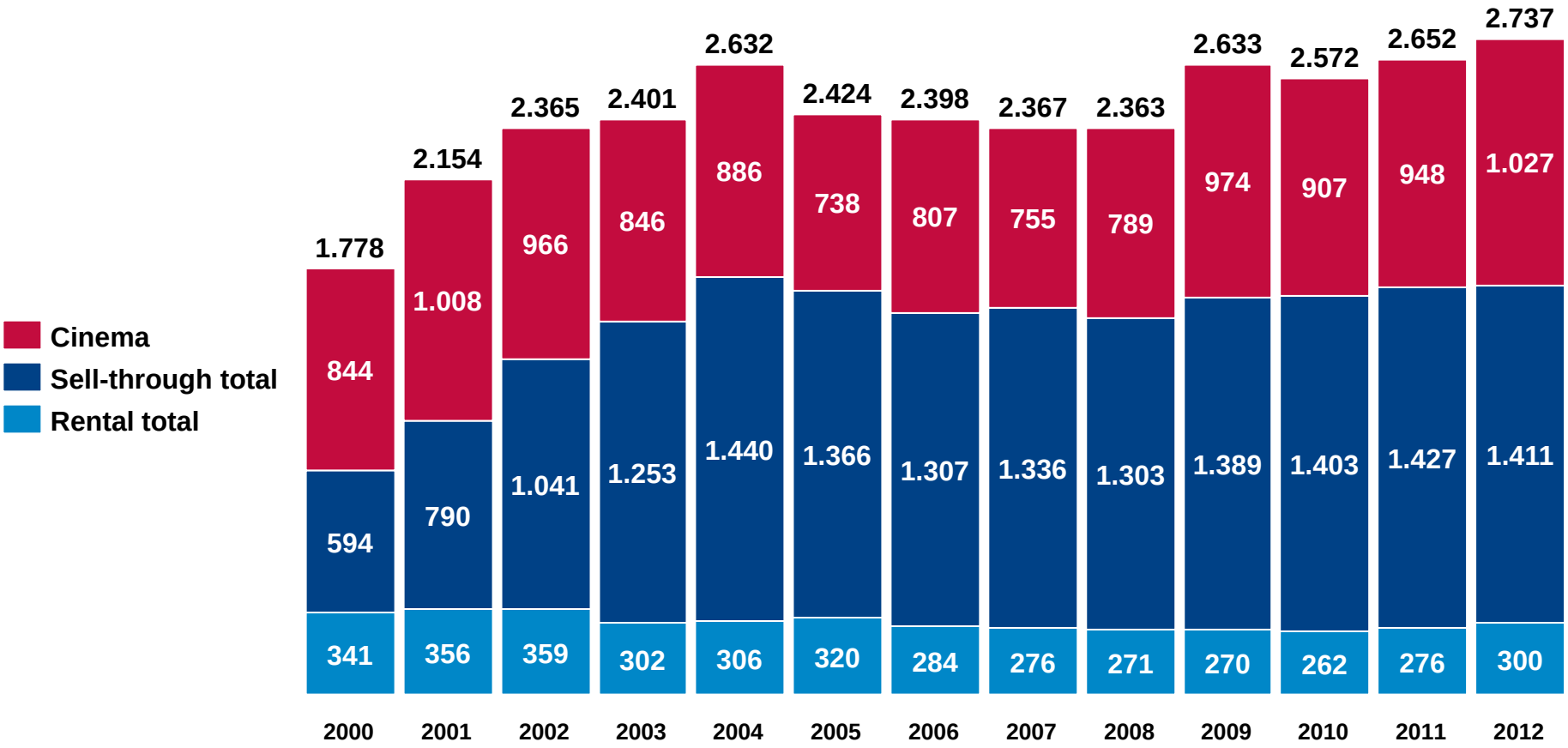
Die Ausgaben für Kino und Video erreichen 2012 ein neues Rekordniveau und sind seit dem Jahr 2000 um knapp eine Mrd. Euro angestiegen



n 2012= 64866
Cinema/ Home Video physical/ digital
All periods: January-December
Value in m €

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Entwicklung Home Video

Zweitbestes Umsatzergebnis in der Geschichte

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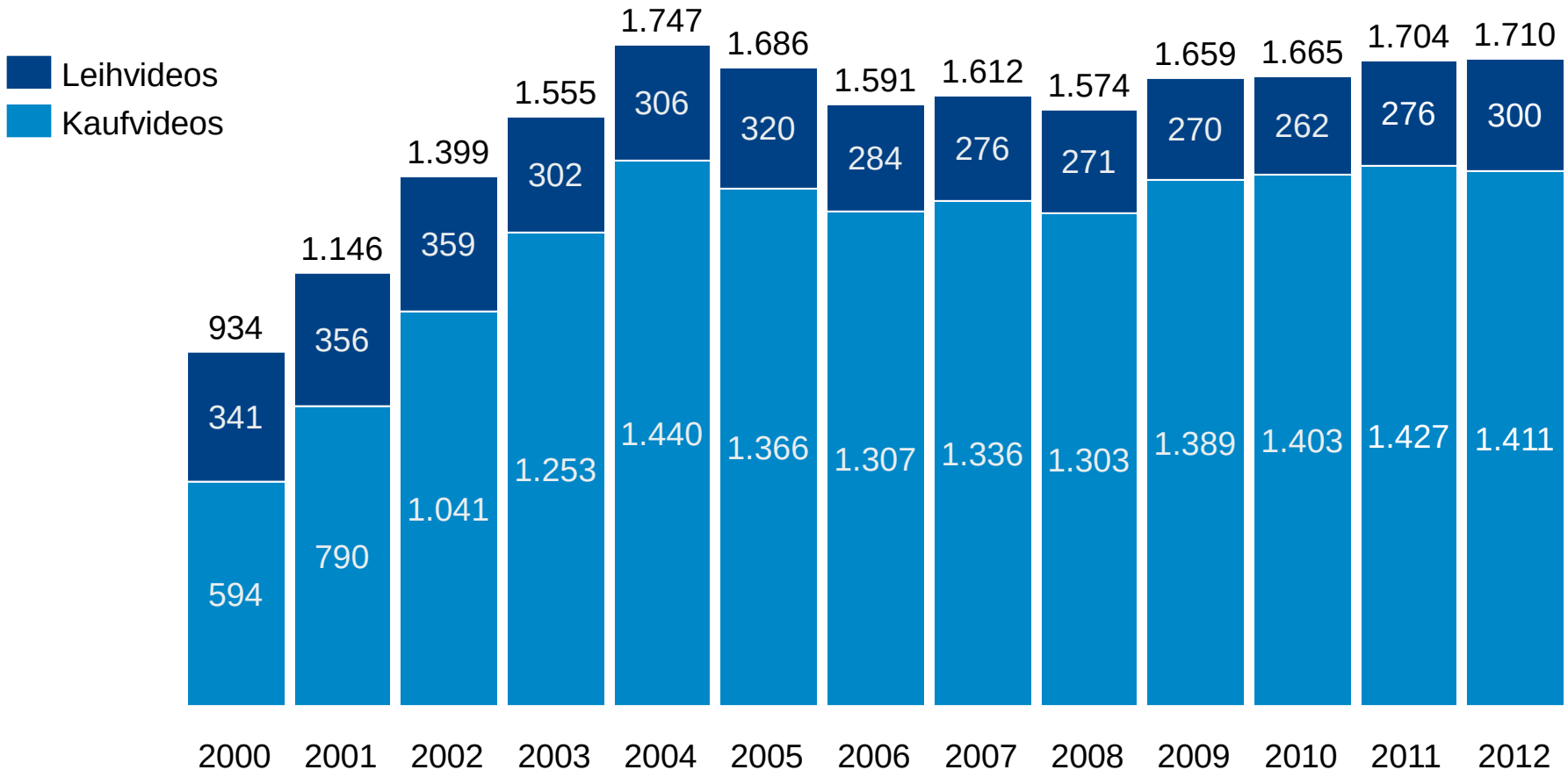
Der Home Video Markt erreicht das zweitbeste Umsatzergebnis seiner Geschichte. Leicht rückläufige Kaufumsätze werden um deutlich wachsende digitale Verleihumsätze überkompensiert.



n 2012 = 38550
Kauf-/ Leihvideos physisch/ digital
alle Zeiträume: Januar-Dezember
Umsatz in Mio. €

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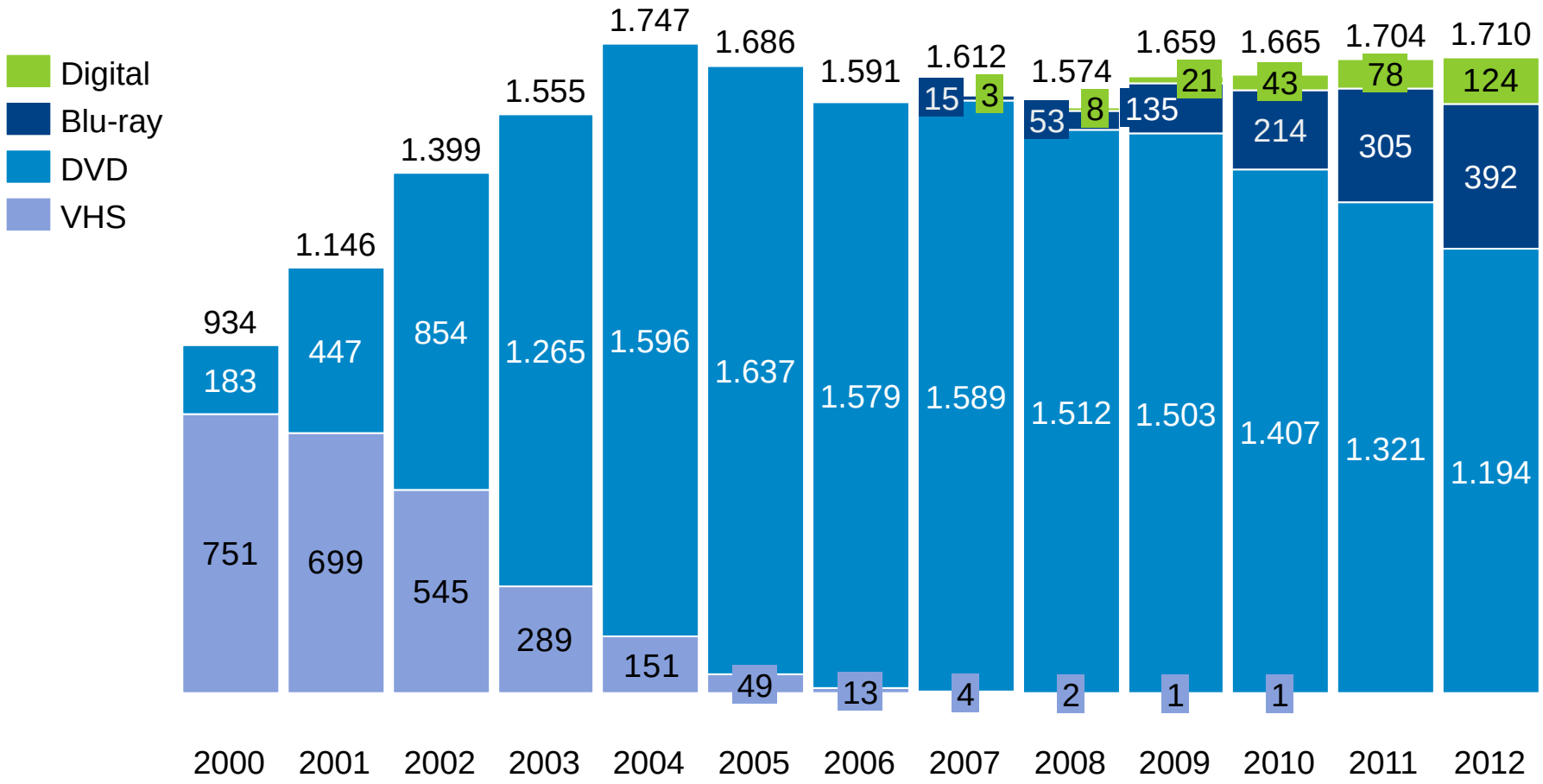
Physisches Produkt dominiert mit 93% Umsatzanteil den Home Video Markt. Blu-ray steigert seine Marktbedeutung auf 23%, Digital überschreitet erstmals die 100 Mio. Euro Grenze.



n 2012 = 38550
Kauf-/ Leihvideos physisch/ digital
alle Zeiträume: Januar-Dezember
Umsatz in Mio. €

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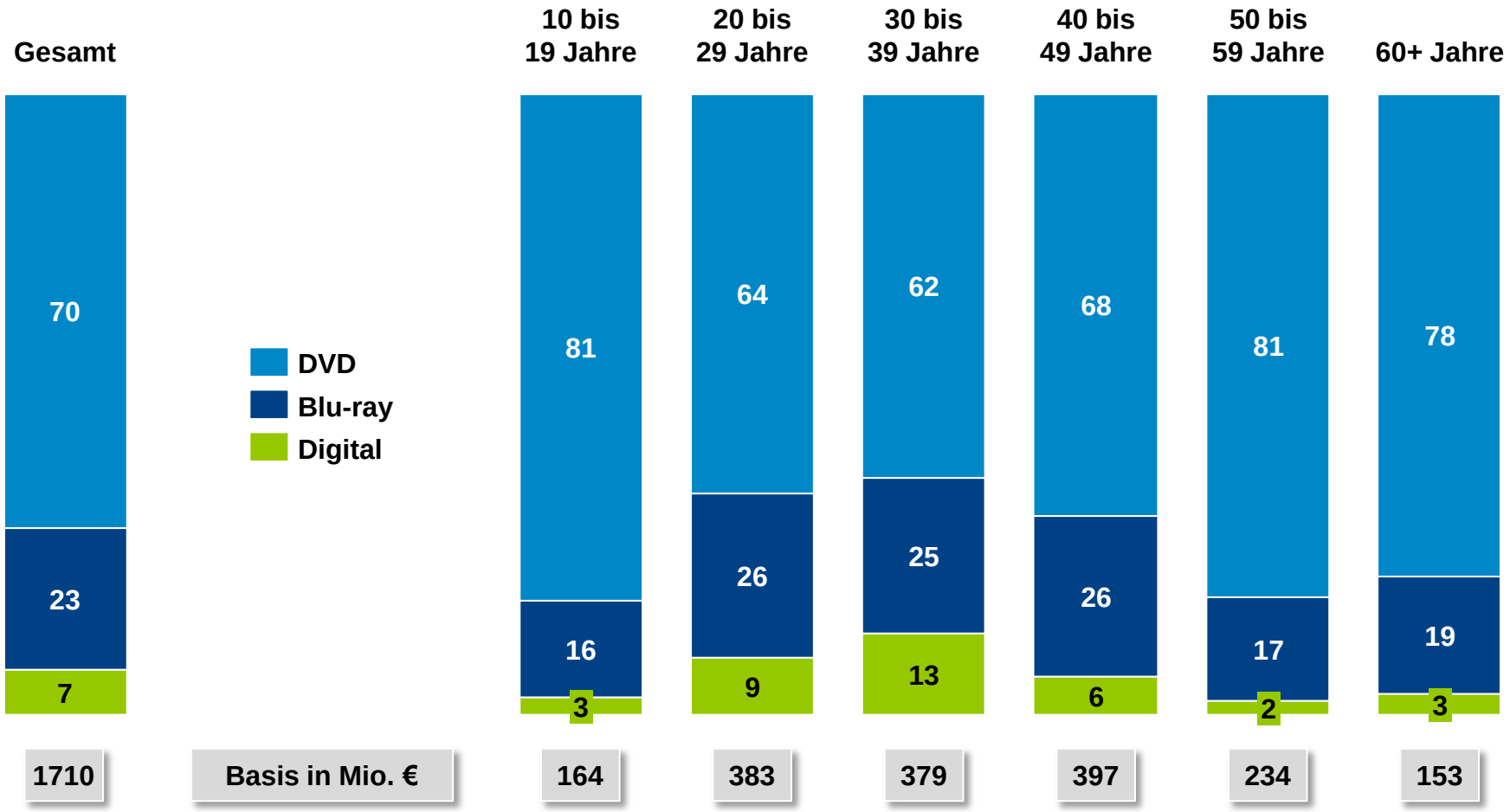
Die Format-Wahl differiert zwischen den Zielgruppen, Blu-ray und Digital sind in den Zielgruppen 20-39 Jahre bereits für mehr als ein Drittel der Umsätze verantwortlich



n Gesamt = 38550
Kauf-/ Leihvideos physisch/ digital
Zeitraum: Januar-Dezember 2012
Umsatz in %

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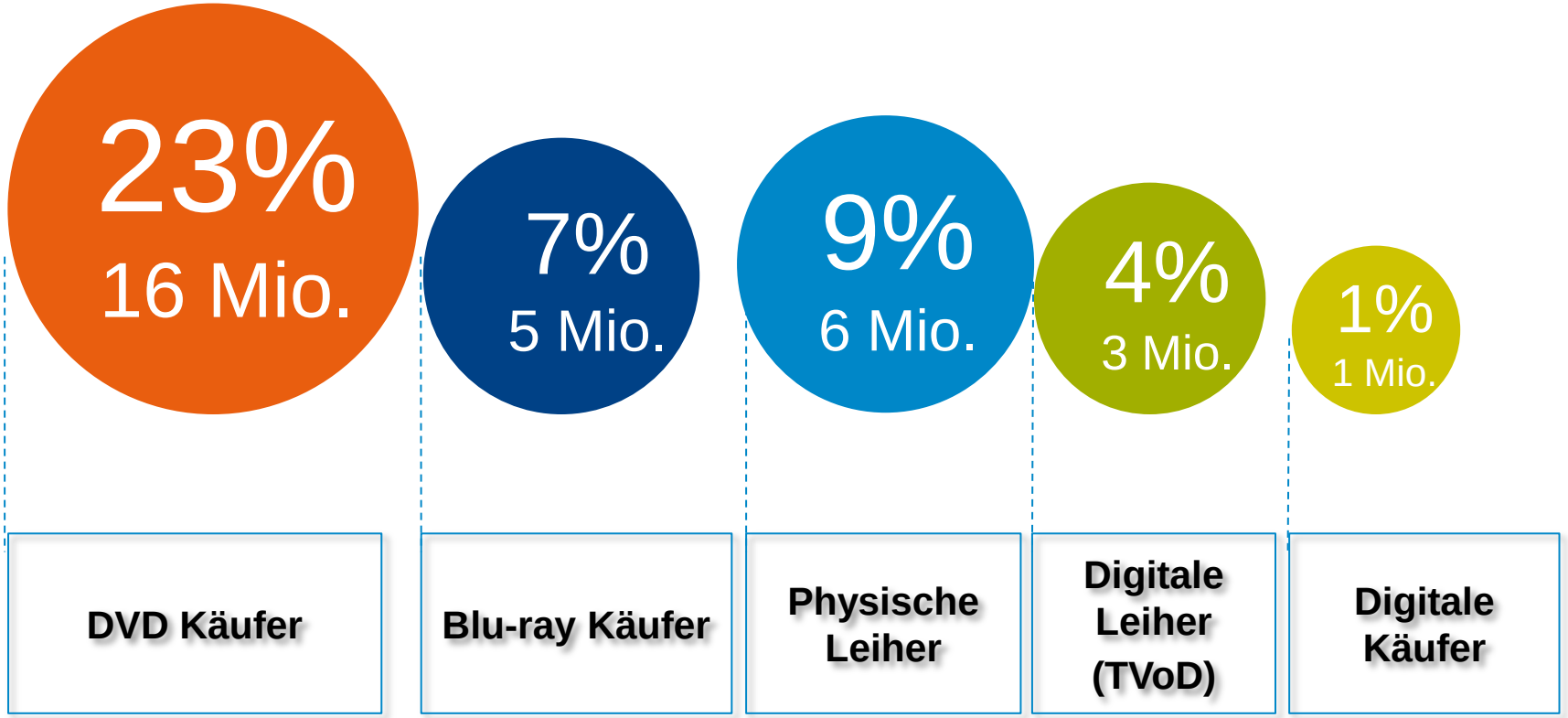
Aktive Videokonsumenten im Jahr 2012

Reichweiten in der Bevölkerung (Personen absolut)



Repräsentativ für die dt. Bevölkerung 2012 = 67,781 Mio. Personen

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Home Video: Der Digitale Videomarkt

Hohe Zuwachsraten, die in erster Linie aus dem Verleihbereich stammen, SVOD macht sich bemerkbar

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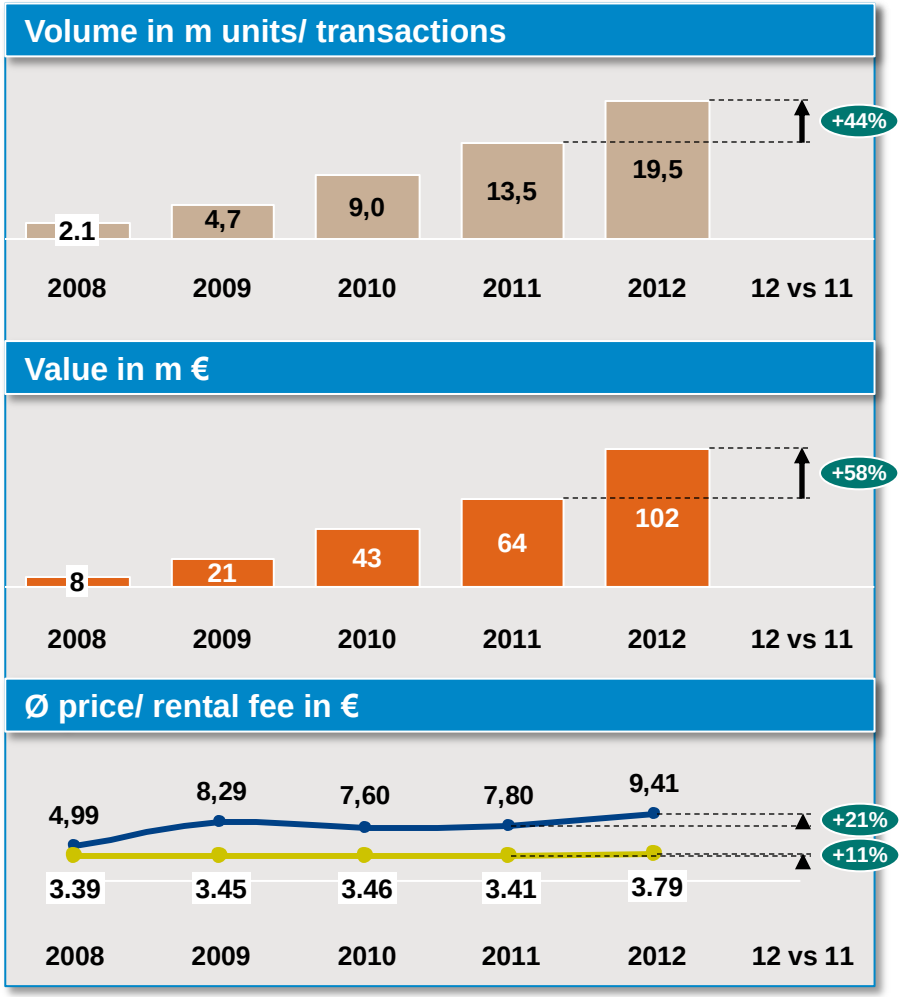
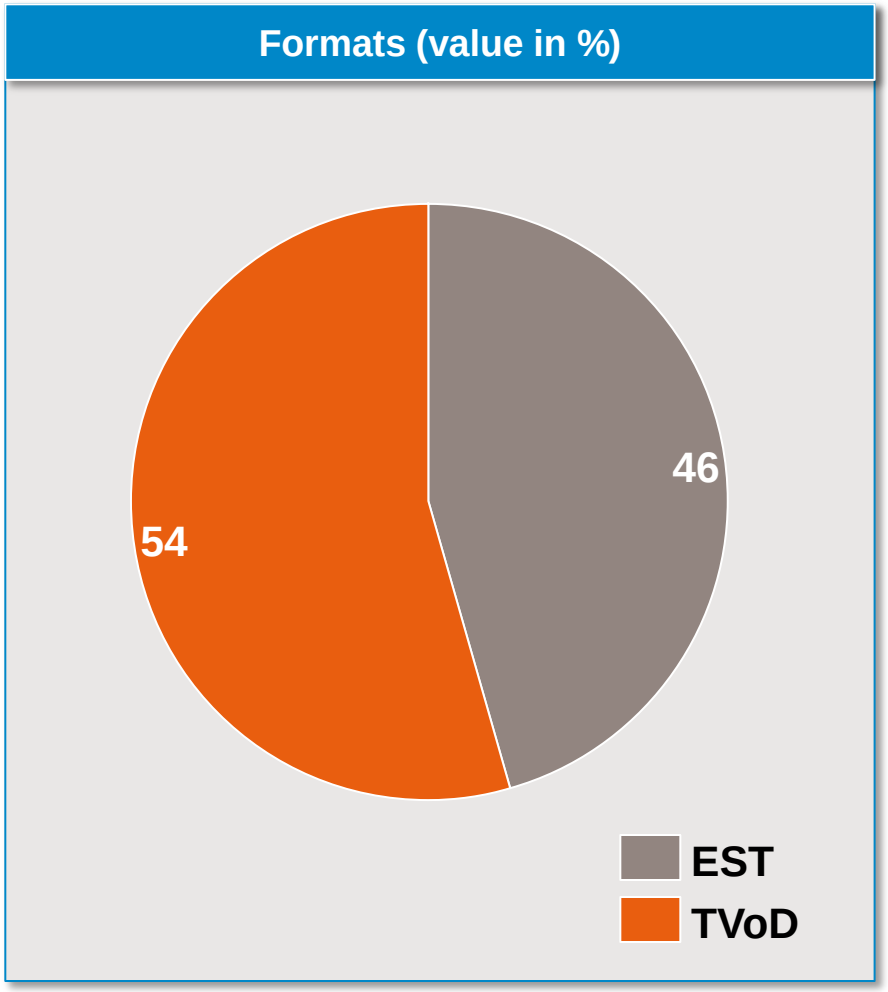
Der Digitale Videomarkt (Verleih/Verkauf) wächst auf Umsatzseite um 58% und verlagert sich stärker in Richtung Verleih





n 2012 = 1249
Video sell-through/ rental market digital w/o SVoD
All periods: January-December

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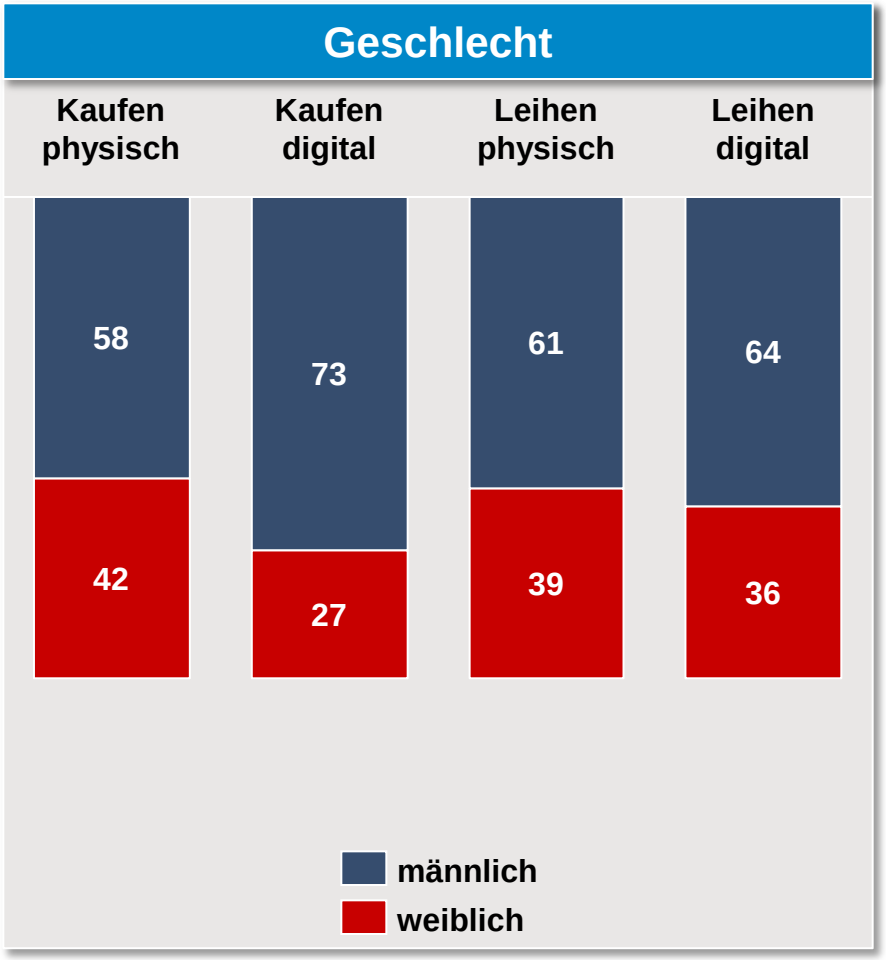
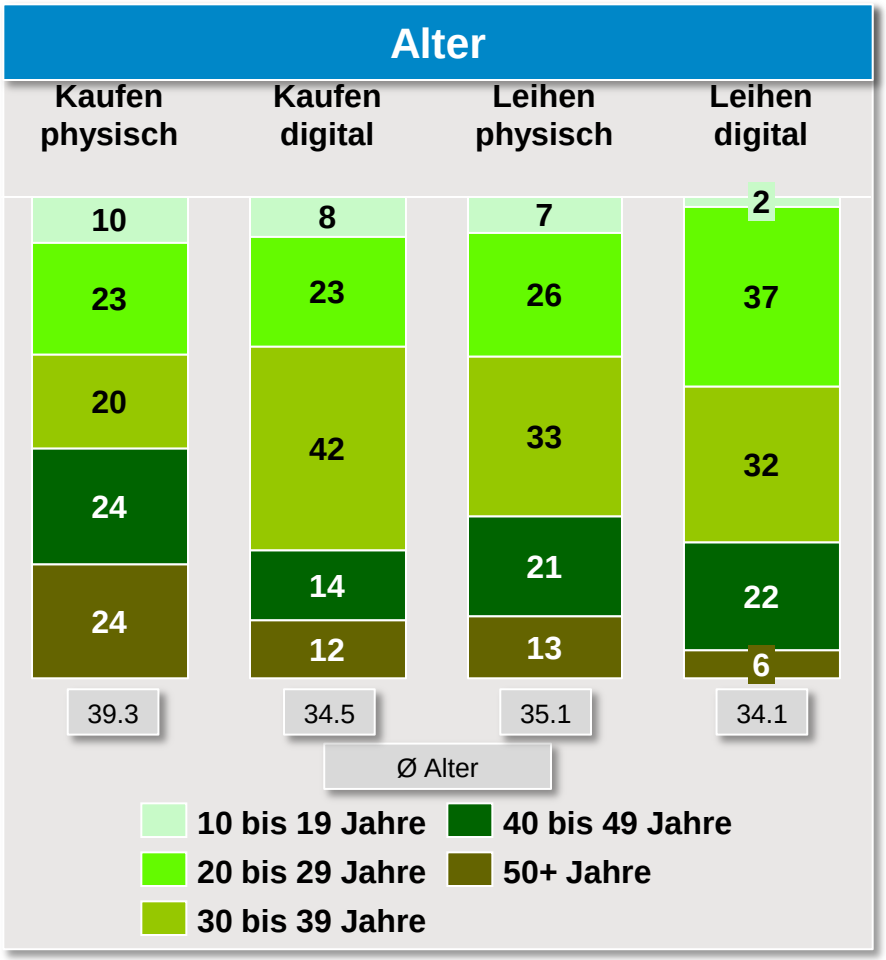
Digitale Konsumenten sind im Vergleich männlicher mit Schwerpunkt 20-39 Jahre





n 2012: Kaufen physisch = 25552; Kaufen digital = 187; Leihen physisch = 11180; Leihen digital = 1631
Kauf-/ Leihvideos physisch/ digital
Zeitraum: Januar-Dezember 2012
Absatz in %

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Der Verleihmarkt

Internet (Post) Verleih und VOD sorgen für ein Plus, Videotheken weiter unter Druck

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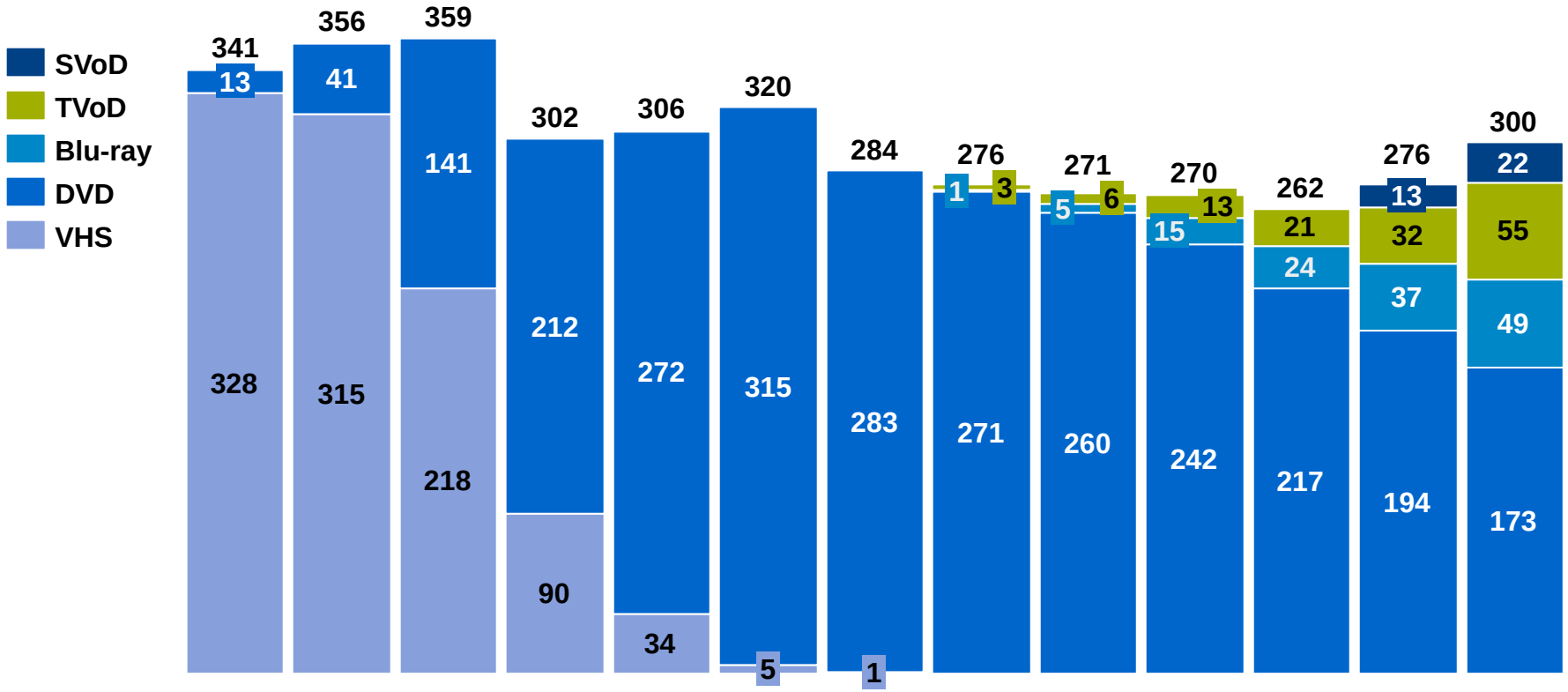
Video Leihmarkt: Die neuen Formate Blu-ray und Video on Demand sorgen für einen wachsenden Markt



Value in m €, Volume w/o SVoD, n 2012 = 12811
All periods: January-December

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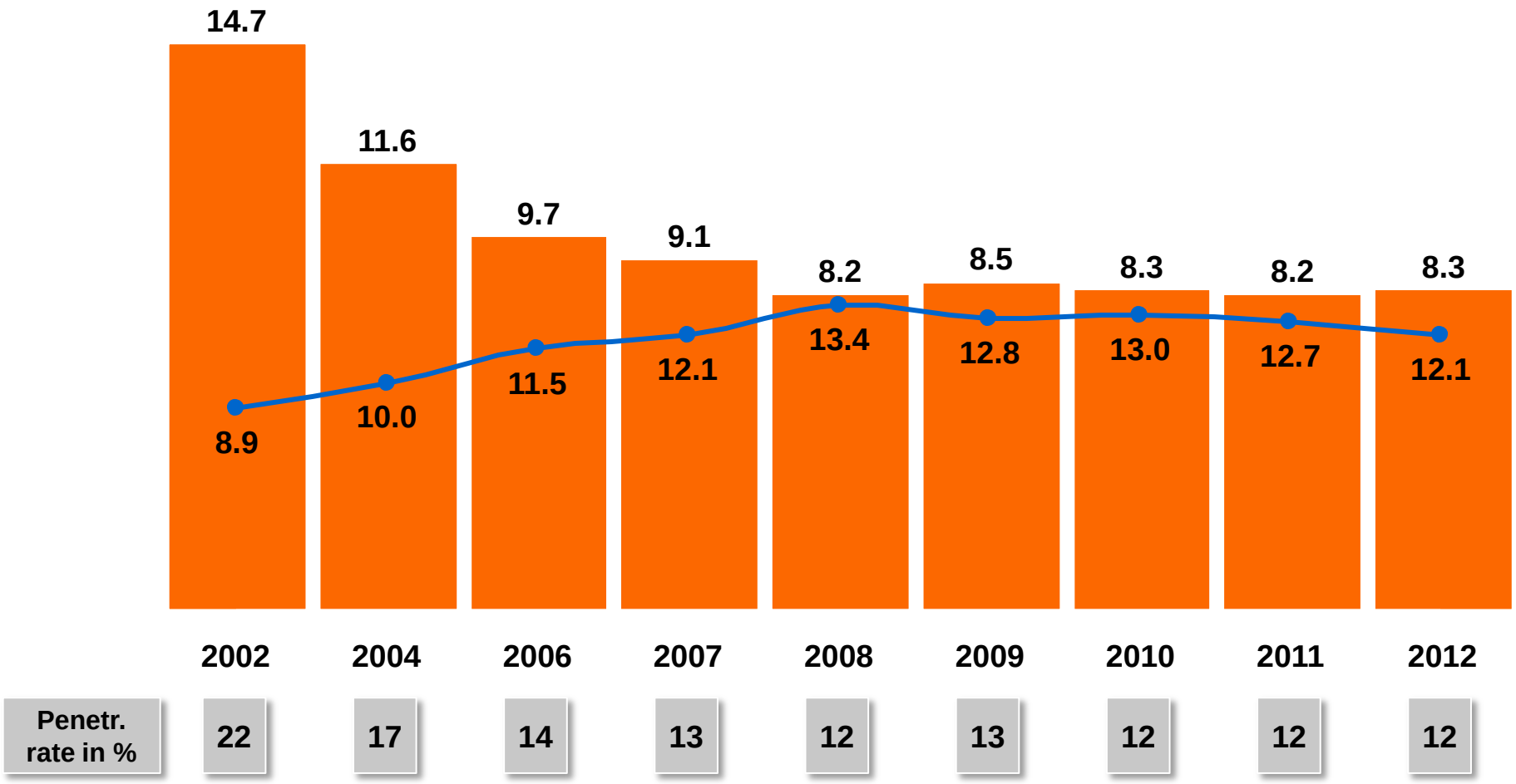
Betrachtet man den physischen und digitalen Leihmarkt gemeinsam sorgt der Zuwachs im digitalen Bereich in Summe seit 2008 für eine stabile Reichweite von 12%



n 2012 = 12811
Video rental market physical/ digital
All periods: January-December
Persons in m/ Ø renting intensity in TA/ person

Ø renting intensity in transactions/ person
Renter in m persons

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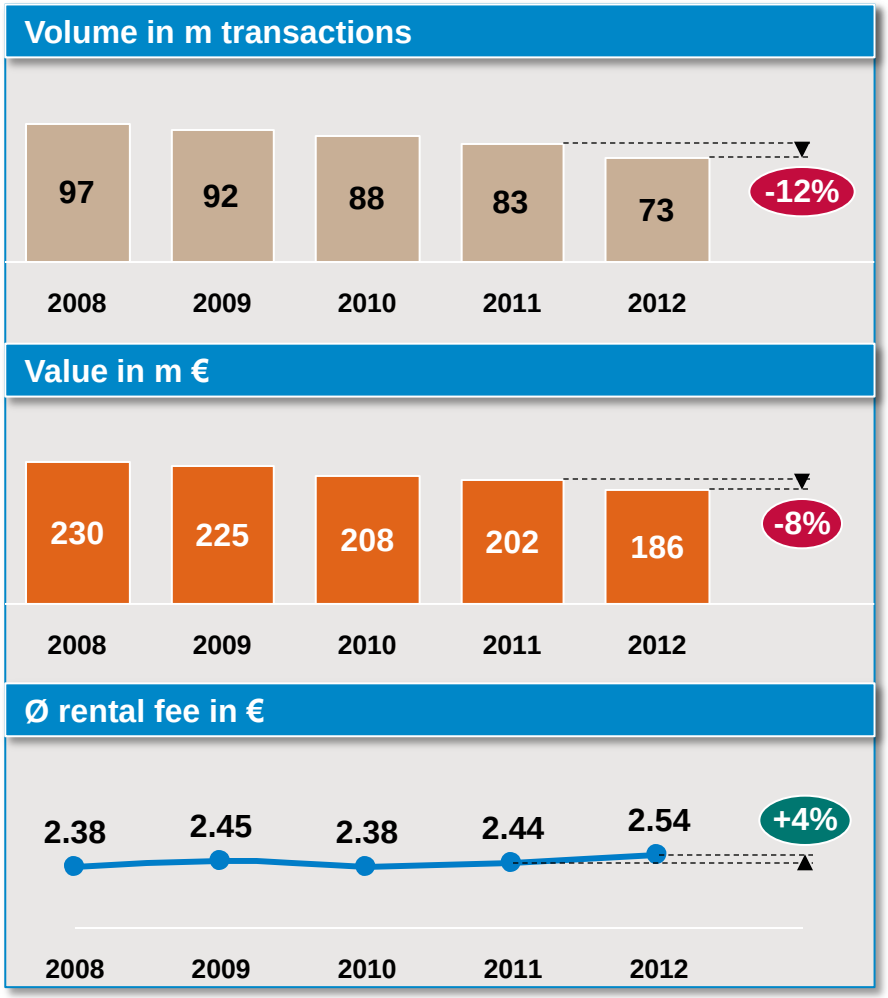
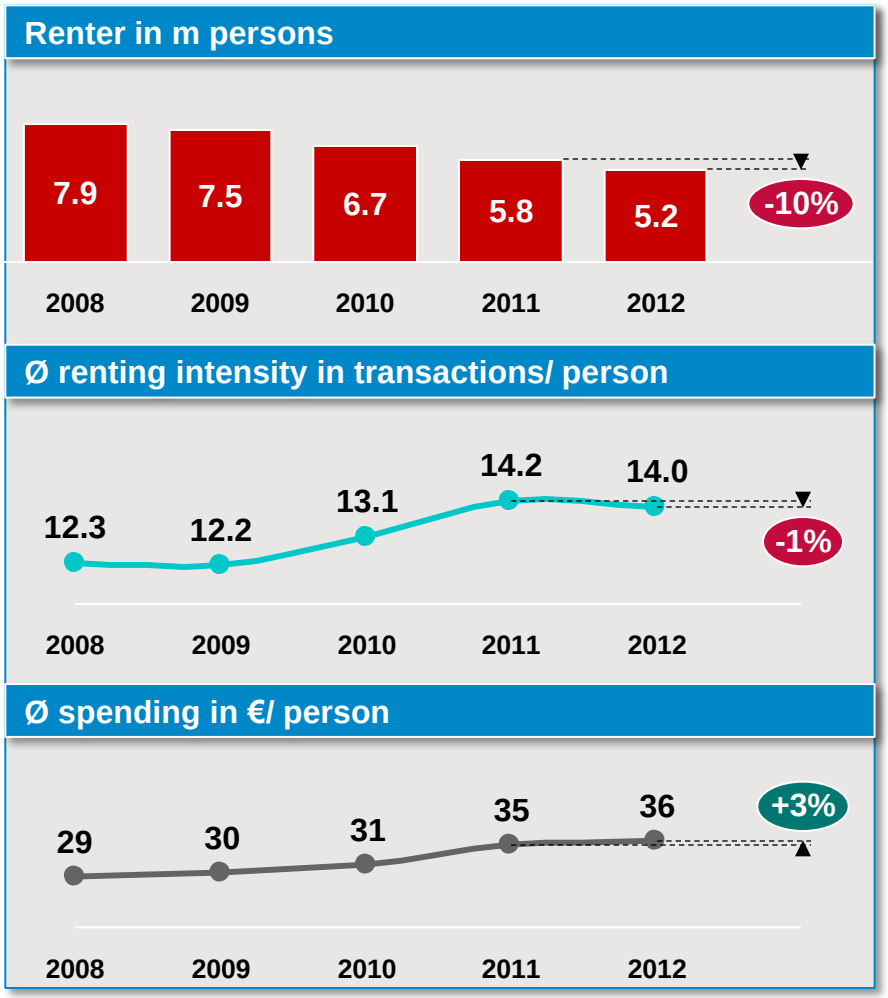
Videothek: Deutliche Käuferrückgänge, die durch steigende Verleihgebühren abgemildert werden. Die Intensität ist unvermindert hoch.





n 2012 = 4369
Video rental market physical Video rental store
All periods: January-December

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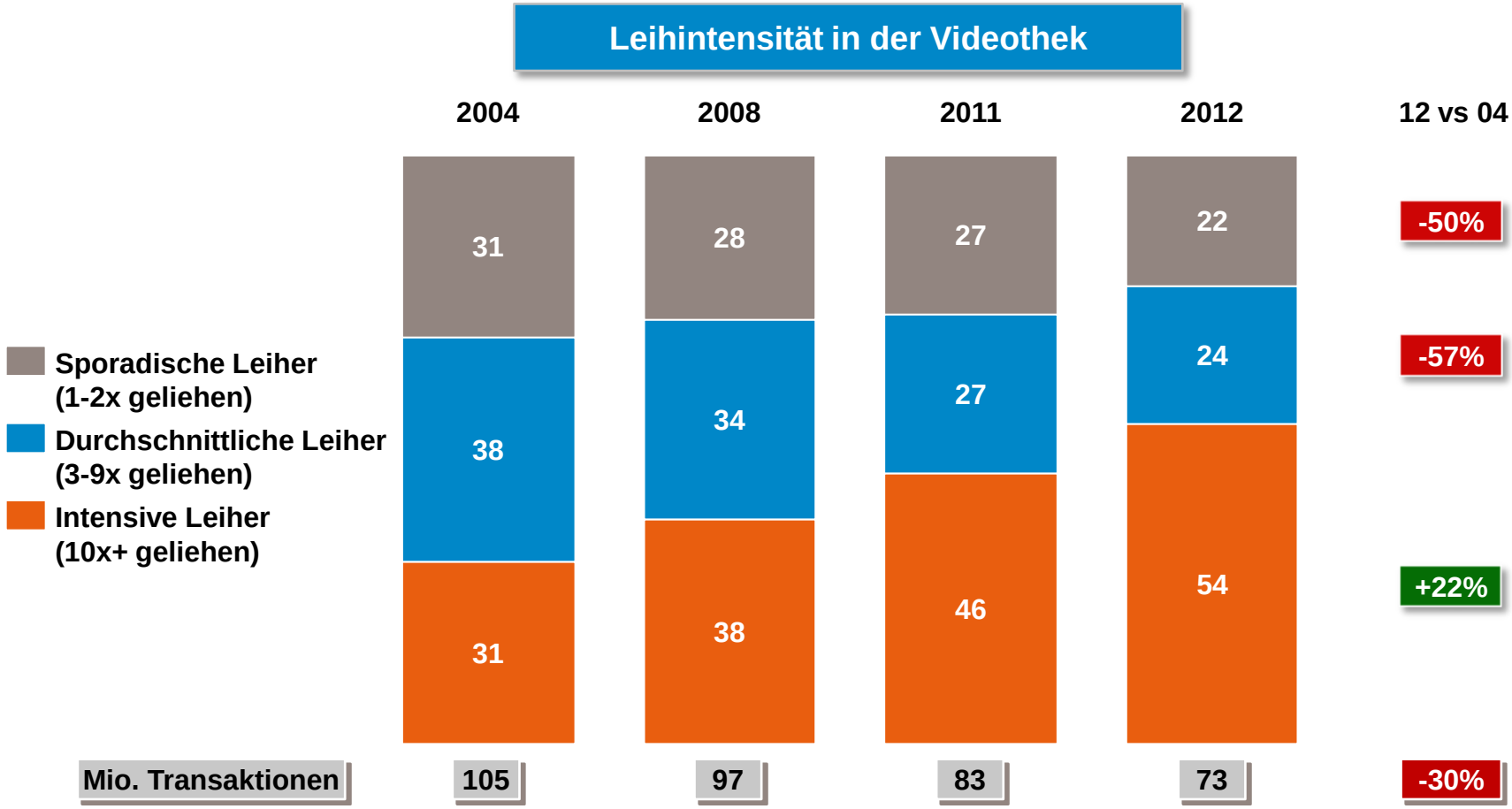
Videothek: Der Verlust der sporadischen und durchschnittlichen Leiher



n 2011 =4369
Videoleihmarkt physisch)Videothek
Alle Zeiträume: Januar-Dezember
Absatz in %

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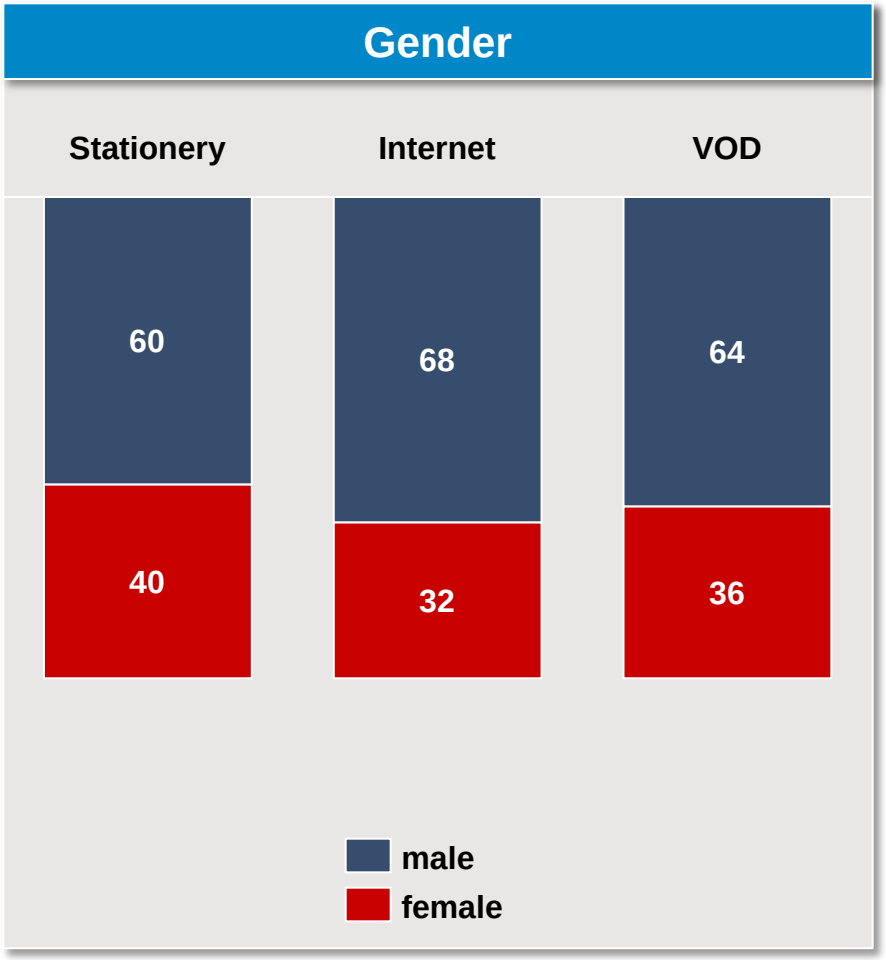
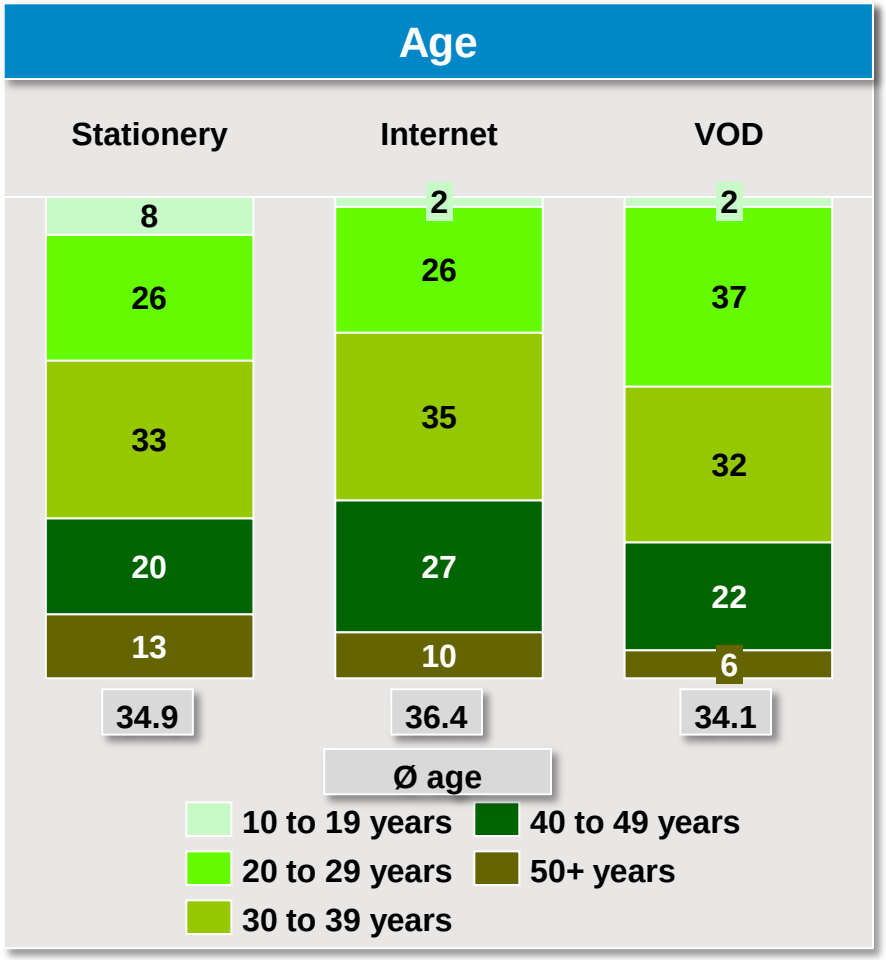
Zielgruppe der Verleihformen im Vergleich: Internet und VOD mit höherem Männeranteil und niedrigeren Anteilen 50 Jahre+





n 2012: Stationery = 4555; Internet = 6625; Digital = 1631
Video rental market physical/ digital
Period: January-December 2012
Volume in %

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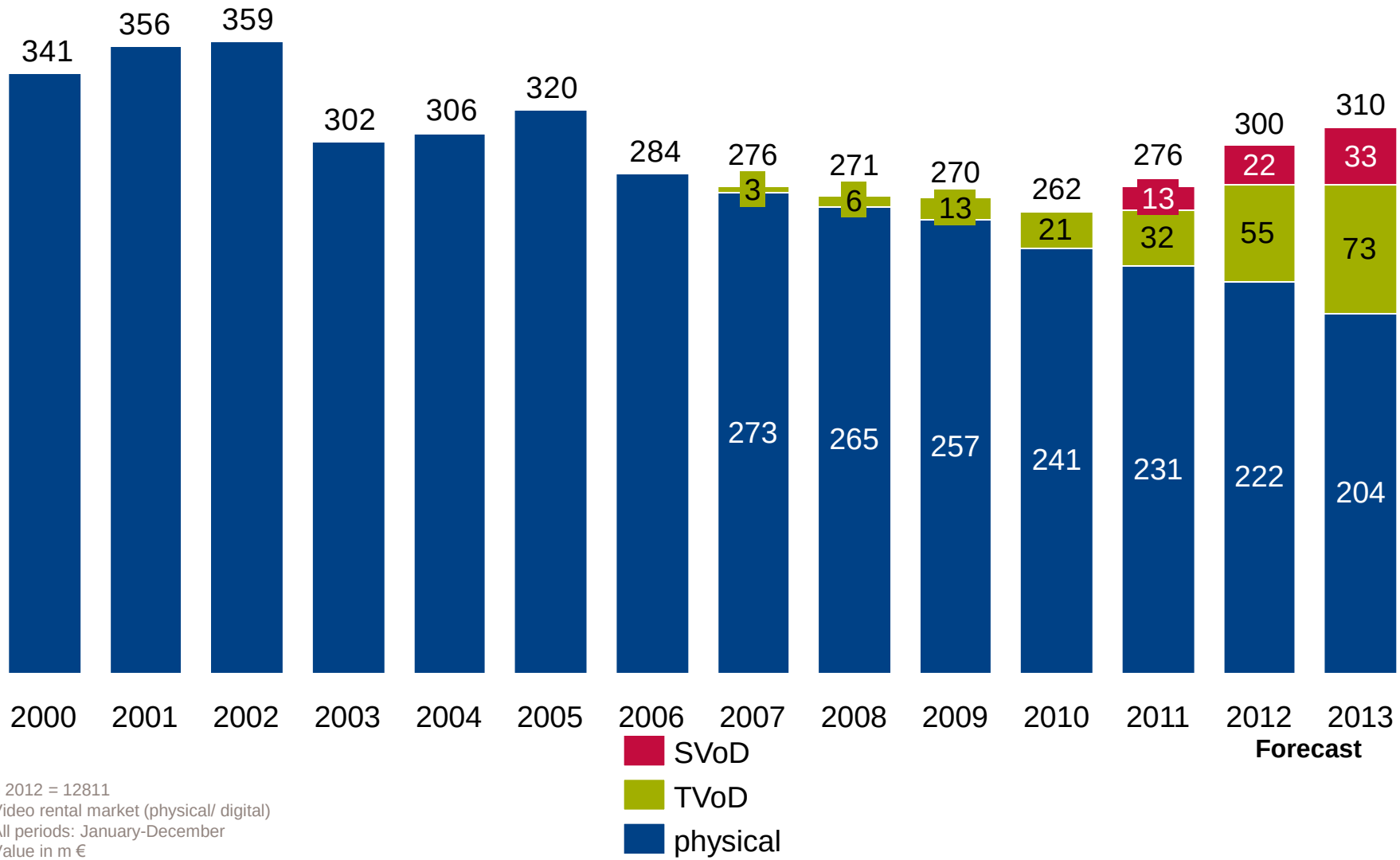
Prognose Verleihmarkt: Weiter steigende digitale Umsätze sorgen für einen wachsenden Markt



n 2012 = 12811
Video rental market (physical/ digital)
All periods: January-December
Value in m €

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Der Videokaufmarkt: Generelle Entwicklung

Stabile Marktentwicklung auf hohem Niveau

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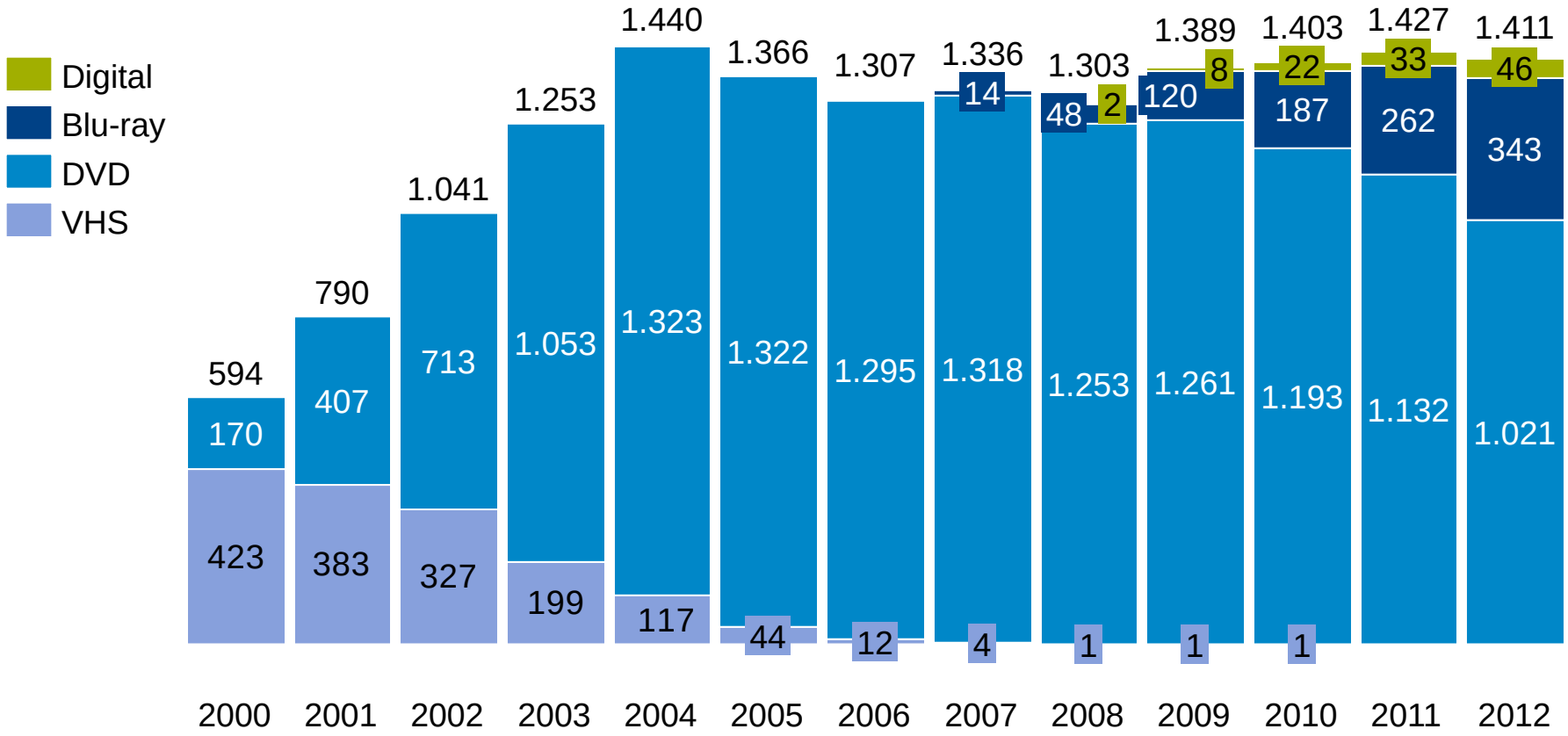
Zuwächse im Bereich Blu-ray und Digital sorgen für einen fast stabilen Markt und das drittbeste Ergebnis des Videokaufmarktes



Mio. Stück	44	51	64	85	103	105	103	104	106	115	118	123	117

n 2012 = 25739
Kaufvideos physisch/ digital
alle Zeiträume: Januar-Dezember
Umsatz in Mio. €

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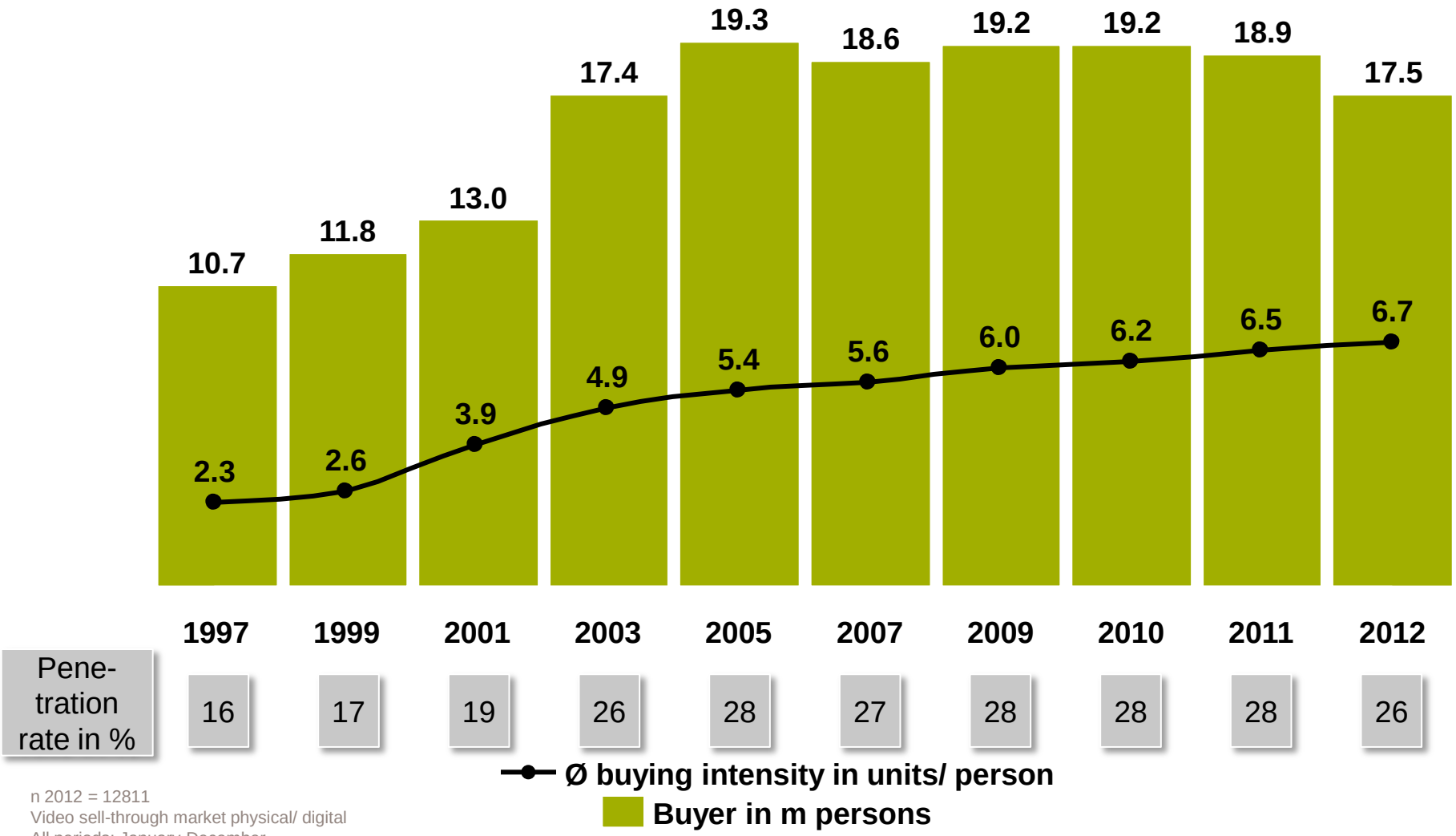
Die Intensität steigt auf 6,7 Filme pro Konsument, aber die Zahl der aktiven Videokäufer sinkt um -7%



n 2012 = 12811
Video sell-through market physical/ digital
All periods: January-December
Persons in m/ Ø buying intensity in units/ person

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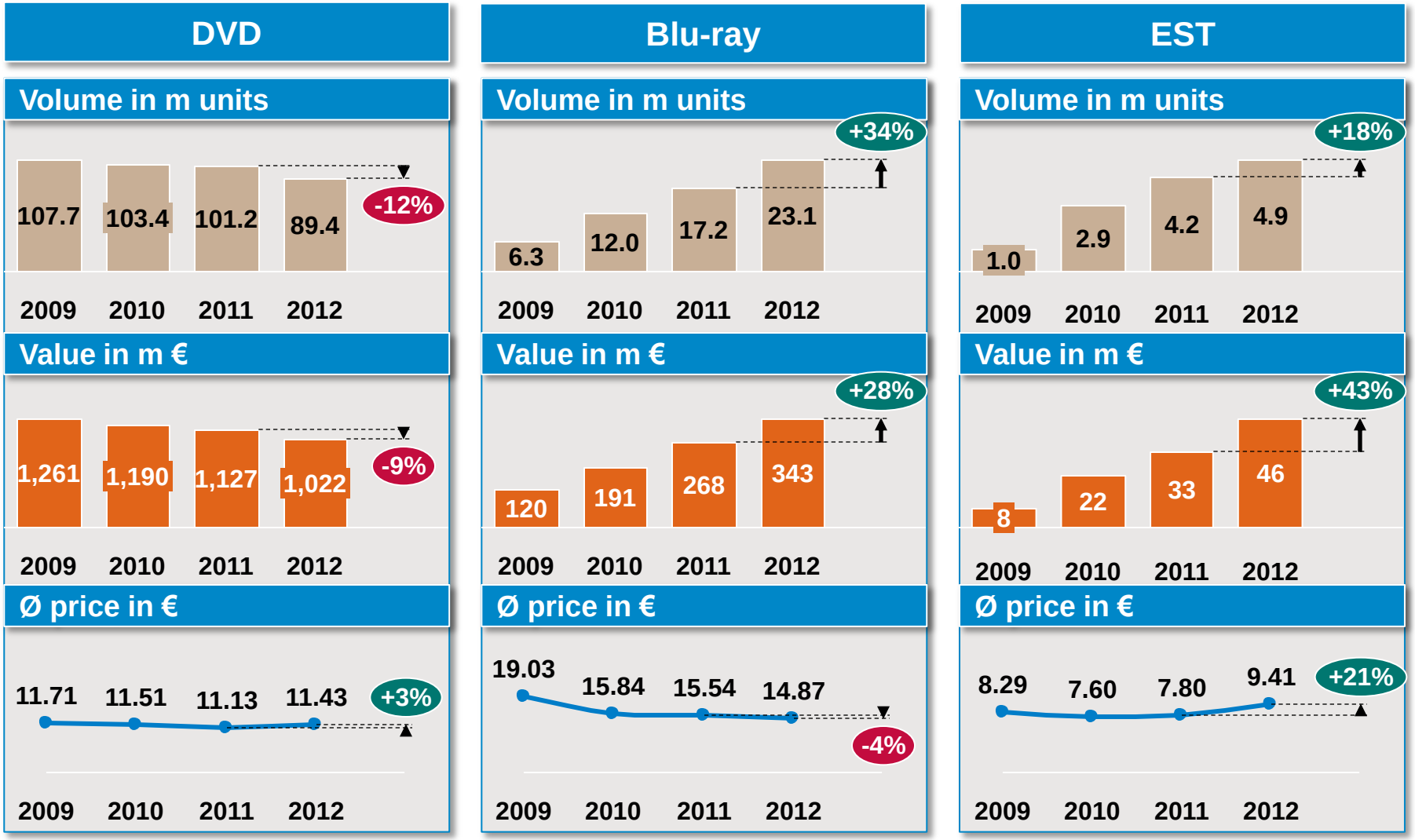
Die DVD Umsätze gehen bei leicht gestiegenen Preisen um 9% zurück. Blu-ray gewinnt weiterhin deutlich. Das Wachstum bei EST kommt in erster Linie aus einer Preissteigerung



n 2012: DVD = 20002; Blu-ray = 5550; EST = 187
Video sell-through market physical/ digital
All periods: January-December

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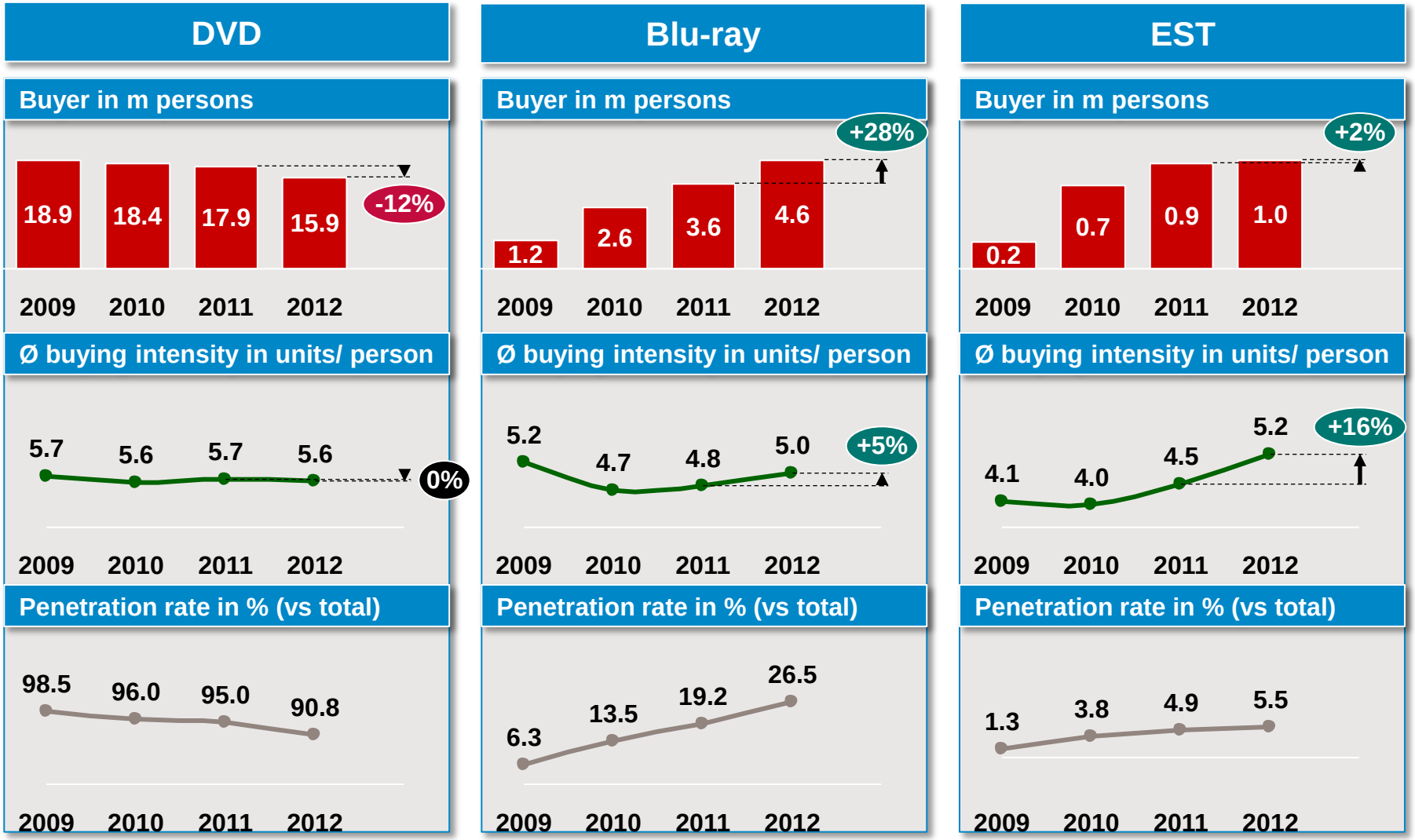
2 Mio. Käuferverlust bei DVD. Mehr als ein Viertel der Videokäufer fragt das hochauflösende Format nach, die EST-Käuferzahl erreicht erstmals knapp 1 Million



n 2012: DVD = 20002; Blu-ray = 5550; EST = 187
Video sell-through market physical/ digital
All periods: January-December

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Der Videokaufmarkt: Distribution

Die Verlagerung der Umsätze in Richtung Internet gewinnt an Geschwindigkeit, was auch dazu führt, dass das Internet erstmals der größte Vertriebskanal ist.

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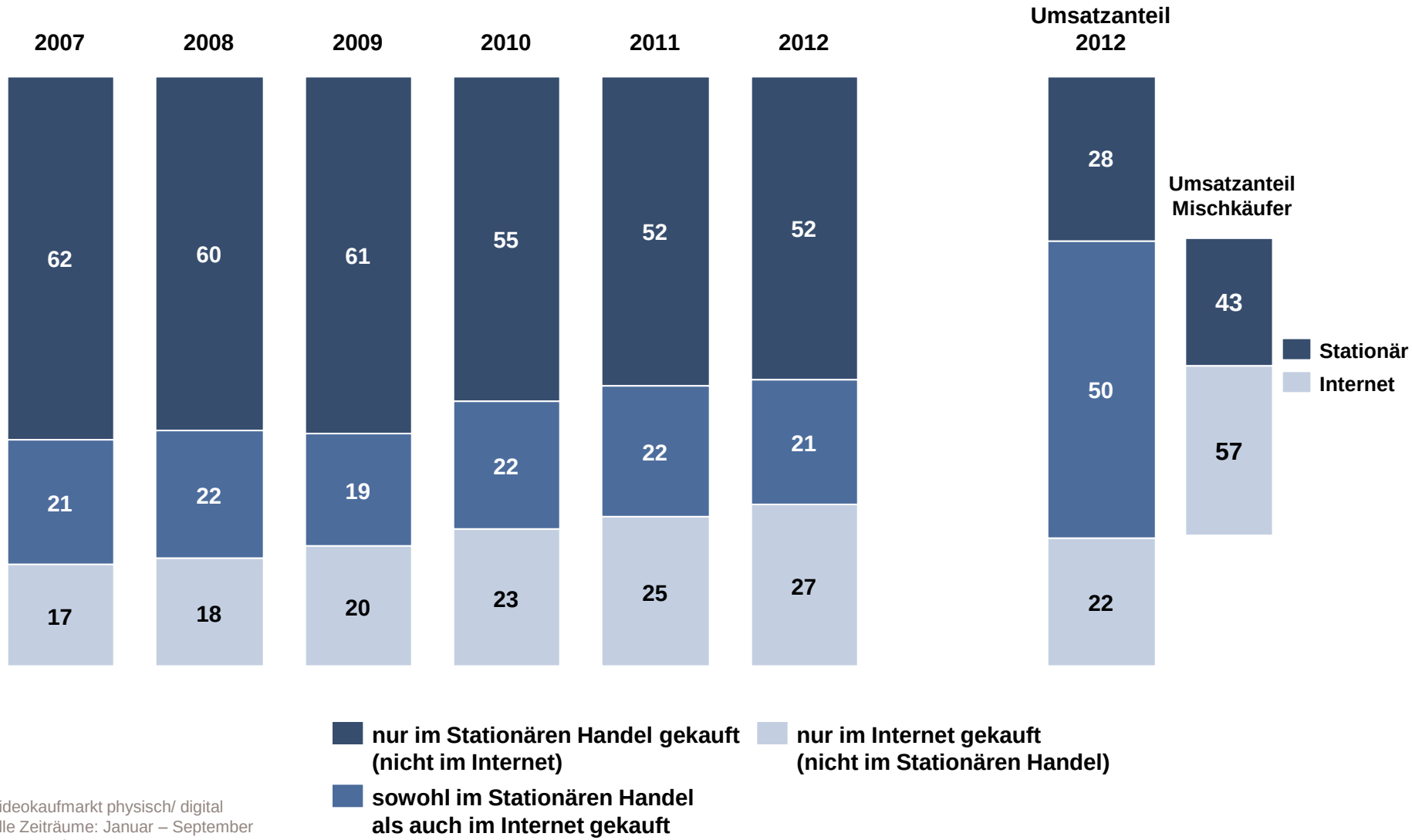
Die Zahl der reinen Internetkäufer wird immer größer. Über 30% kaufen mittlerweile nur noch Online. Die Mischkäufer (stationär und online) sind für knapp 50% der Umsätze verantwortlich



Videokaufmarkt physisch/ digital
Alle Zeiträume: Januar – September
Personen in %

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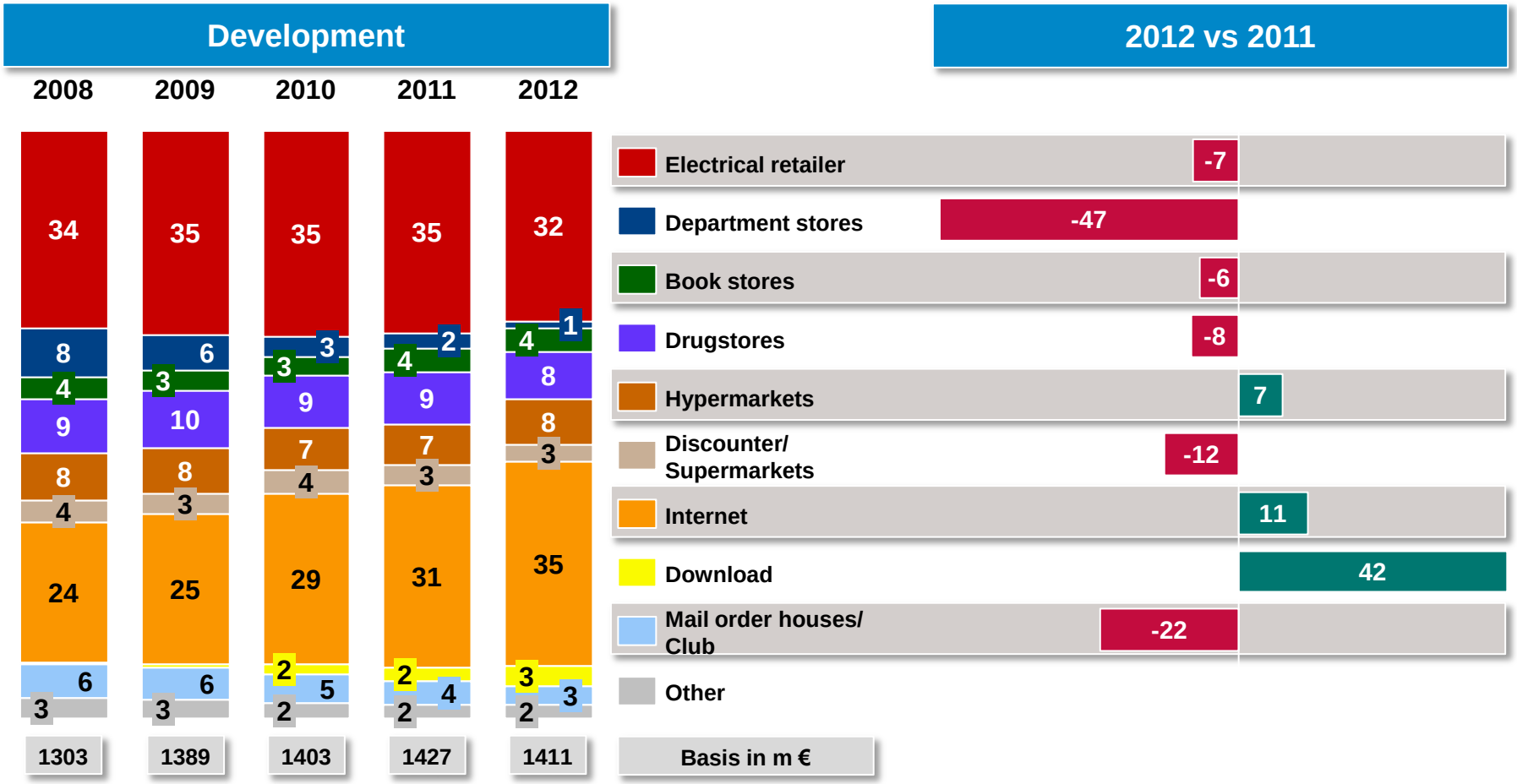
Die Verlagerung der Umsätze in Richtung Internet gewinnt an Geschwindigkeit. Erstmals ist das Internet der größte Vertriebskanal.



n 2012 = 25739
Video sell-through market physical/ digital
All periods: January-December
Value in %

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Der Videokaufmarkt: Preise

Stabile Preise im Formate-Mix

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Moderater Rückgang bei Blu-ray, steigende Preise bei DVD, HD und TV-Staffeln lassen die Preise bei EST steigen

n 2012: DVD = 20002; Blu-ray 2D = 5042; Blu-ray 3D = 508; EST = 187
Kaufvideos physisch/ digital
Alle Zeiträume: Januar-Dezember
Ø Preis in €

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Der Videokaufmarkt: Prognose

Leicht rückläufiger Markt auf hohem Niveau

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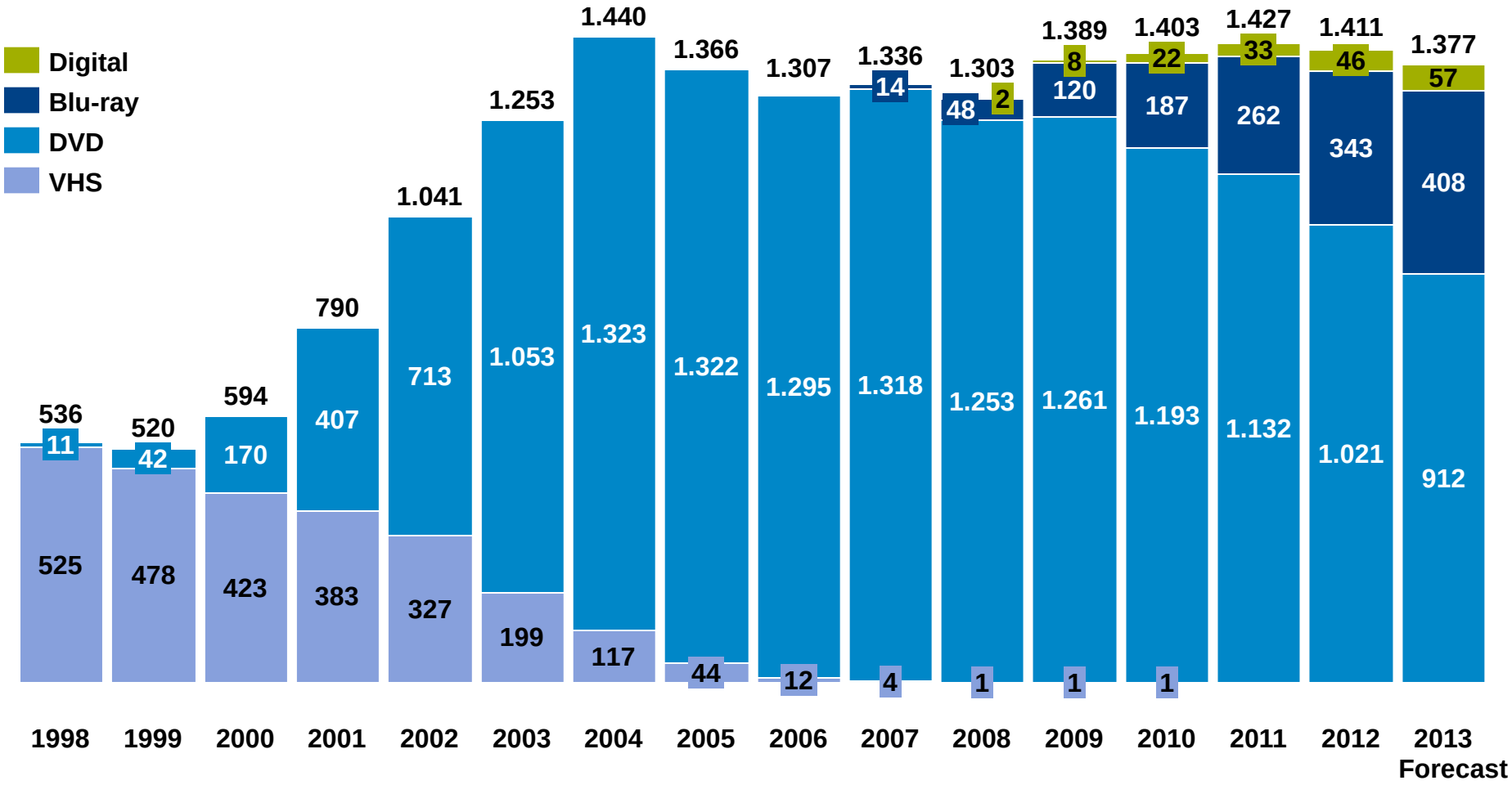
Prognose Videokaufmarkt:
Leicht rückläufiger Markt auf hohem Niveau



n 2012 = 25739
Video sell-through market physical/ digital
Value in m €

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Der Home Video Markt: Prognose

Stabiler Markt mit ansteigenden digitalen Umsätzen

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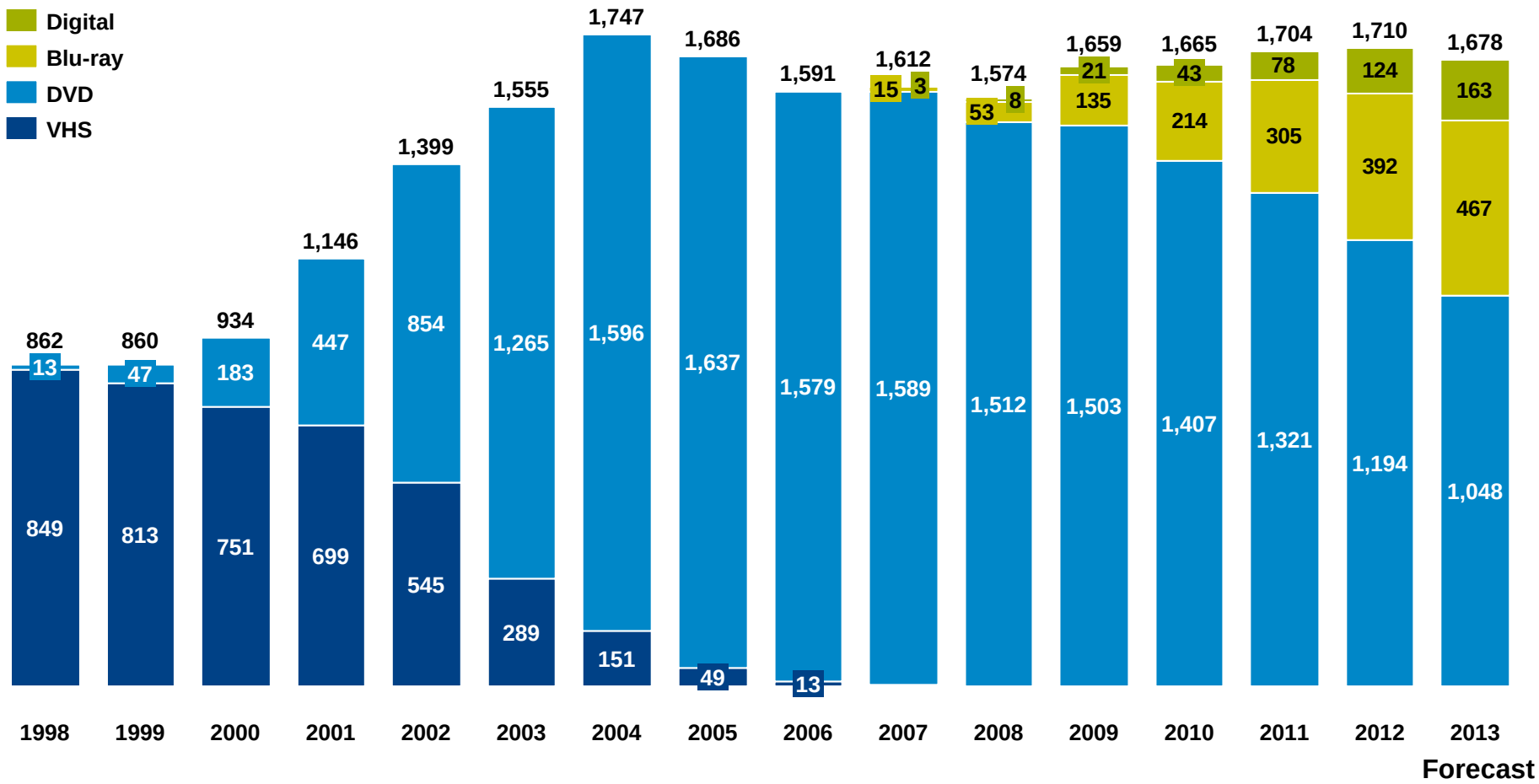
Der Ausblick für den Videomarkt: Stabiler Markt auf hohem Niveau, digitale Umsätze gewinnen an Bedeutung, DVD/BD bleibt das führende Trägermedium



n 2012 = 25739
Video sell-through/ rental market physical/ digital (since 2011 incl. SVoD)
Value in m €

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