

# DER HOME VIDEO MARKT 2015

Erstellt im Auftrag der Filmförderungsanstalt

**Bitte beachten Sie, dass es vereinzelt (bei einem hohen Detaillierungsgrad) zu geringen Fallzahlen (<100) kommen kann. Die Streuung wird in diesen Fällen entsprechend groß, weshalb die zugrunde gelegten Zahlen nur eingeschränkt interpretierbar sind. Für eine verbesserte Transparenz wurden je nach Charttyp die Fallzahlen in diesen Chartsatz integriert und/oder geringe Fallzahlen markiert.**

**Wenn notwendig, wurden glättende Verfahren angewendet, um eine Zeitreihenbetrachtung zu erleichtern.**

**Um Coveragelücken auszugleichen, wurden externe Benchmarks (z. B. Handelspaneldata, exFactory-Zahlen, etc.) zur Korrektur verwendet.**

# Methodensteckbrief Stand Januar 2016



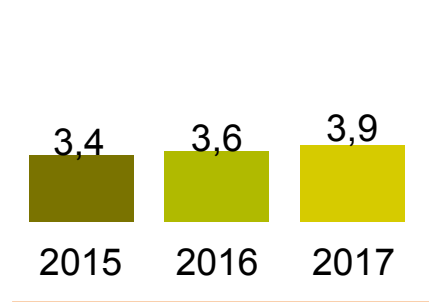
Befragungsinhalt		Erfassung aller Einkäufe (Neuprodukte) / Leihvorgänge von Videos (alle Formate inkl. digital (nur kostenpflichtige Modelle), von deutschen Privatpersonen ab 10 Jahren.
Befragungsmethode		Schriftlich (ca. 80% Online (Anteil steigend), ca. 20% Paper & Pencil) in Form eines Tagebuchs, das von den Panelteilnehmern selbst kontinuierlich geführt wird.
Hochrechnung		Die Ergebnisse werden auf die Grundgesamtheit (Stand Januar 2016: 67,7 Mio.) der deutschen Bevölkerung ab 10 Jahre hochgerechnet
Stichprobe		Kontinuierliches Panel von 25.000 deutschen Einzelpersonen ab 10 Jahren (brutto, Stand Januar 2016).

# Konsumklima und Verbrauchernachfrage

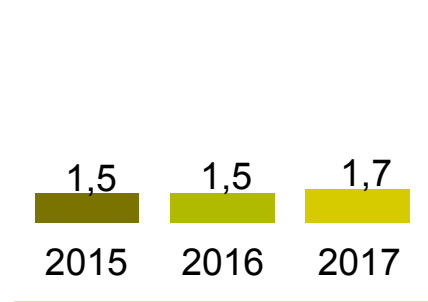
# Europa und die Weltwirtschaft – Erholung verfestigt sich

## Veränderung des realen Bruttoinlandsprodukts vs. Vorjahr (in %)

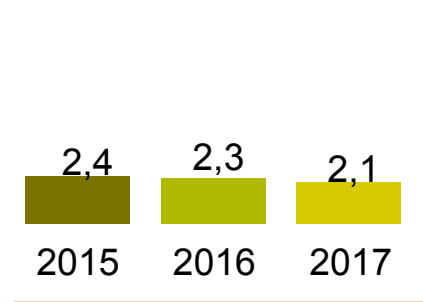
### Weltwirtschaft



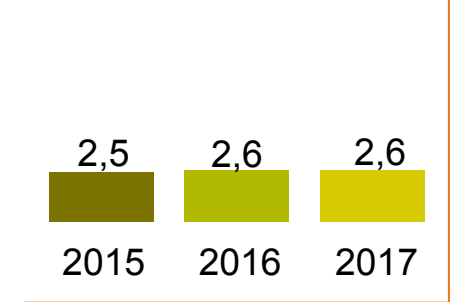
### Euroraum



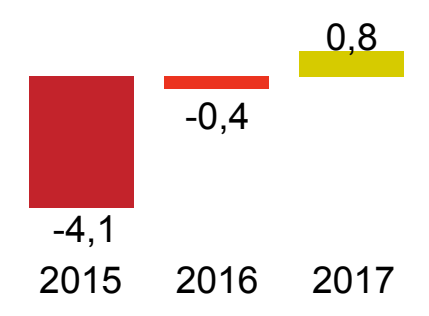
### UK



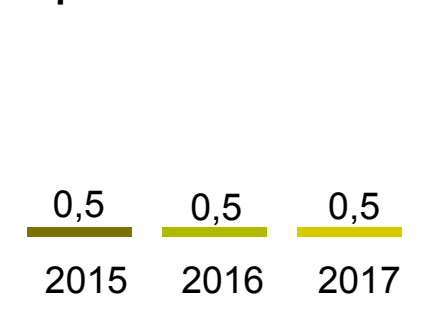
### USA



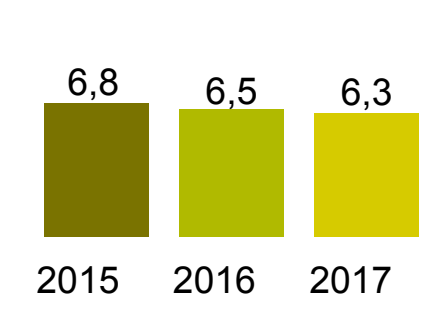
### Russland



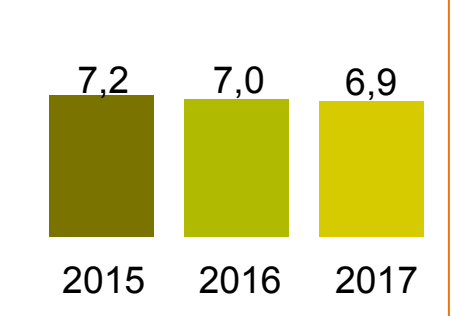
### Japan



### China



### Indien



Quelle: DIW (Stand: 16.12.2015)

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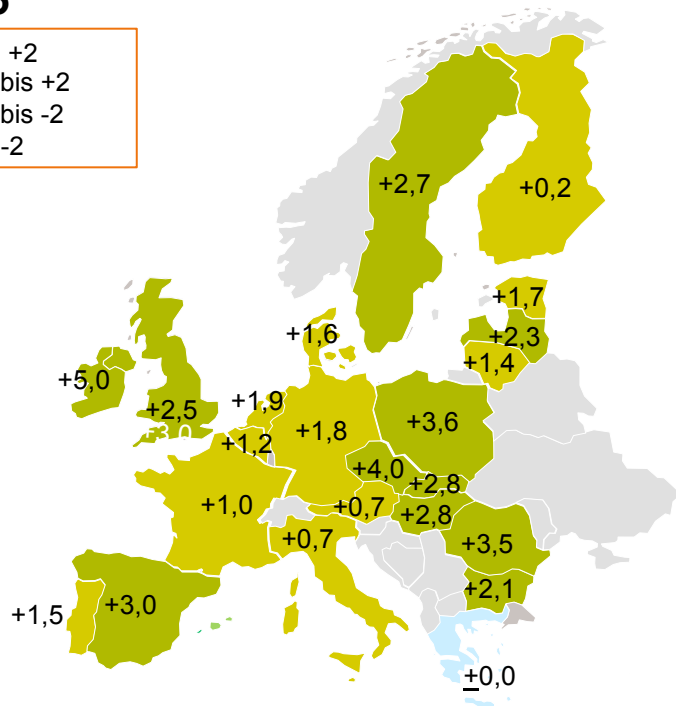
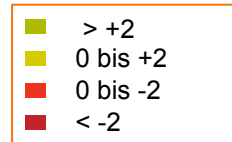
Please note that in particular situations, for example at a high degree of specification, comparatively low number of counts can occur which may limit the accuracy of the interpretation to some extent. In such cases the data may be less conclusive. If required, smoothing procedures will have been applied in order to facilitate time series analysis. To correct for coverage gaps, internal/external benchmarks have been used.

# 2015 erreicht Europa wieder durchgängig positive Zahlen beim Wirtschaftswachstum

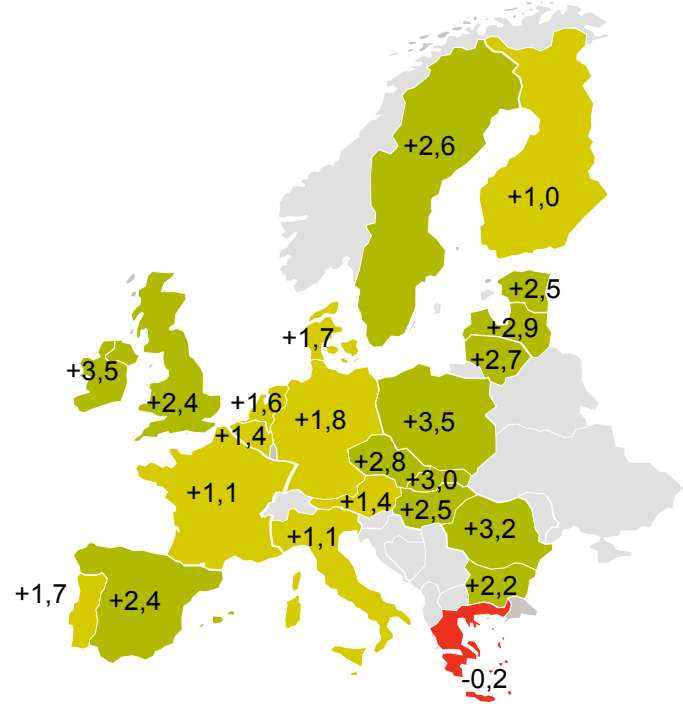


## Veränderung des realen Bruttoinlandsprodukts vs. Vorjahr (in %)

**2015**



**2016**



Quelle: Projektgruppe Gemeinschaftsdiagnose, Herbst 2015 (Stand: 14.10.2015)

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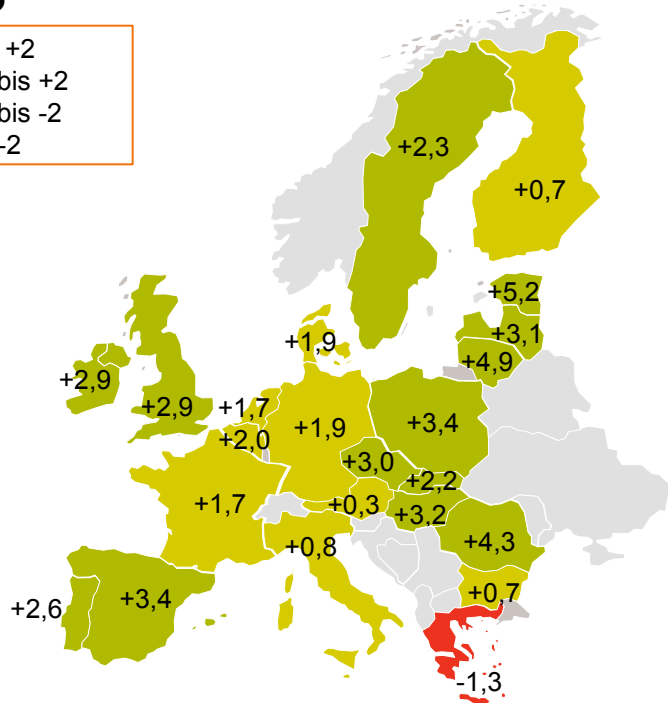
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# Konsum wird in nahezu allen Ländern eine wichtige Stütze der Konjunktur sein – Griechenland bleibt in der Schuldenkrise gefangen

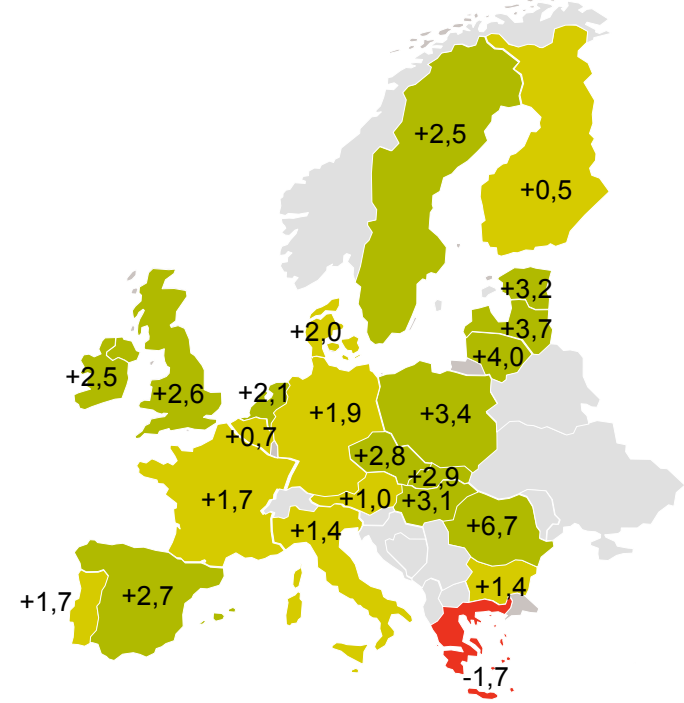


## Veränderung des realen privaten Konsums vs. Vorjahr [in %]

2015



2016



Quelle: EUROSTAT, Herbst Prognose der EU Kommission, November 2015

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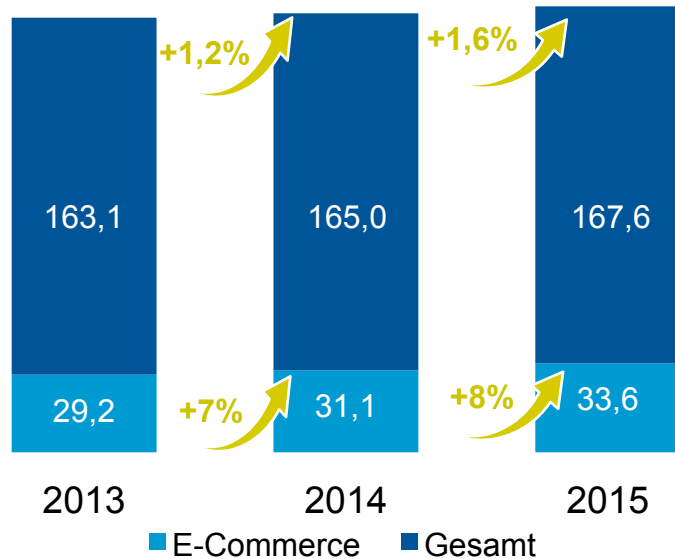
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# Sowohl Nonfood wie auch der Lebensmittel-Einzelhandel können 2015 zulegen

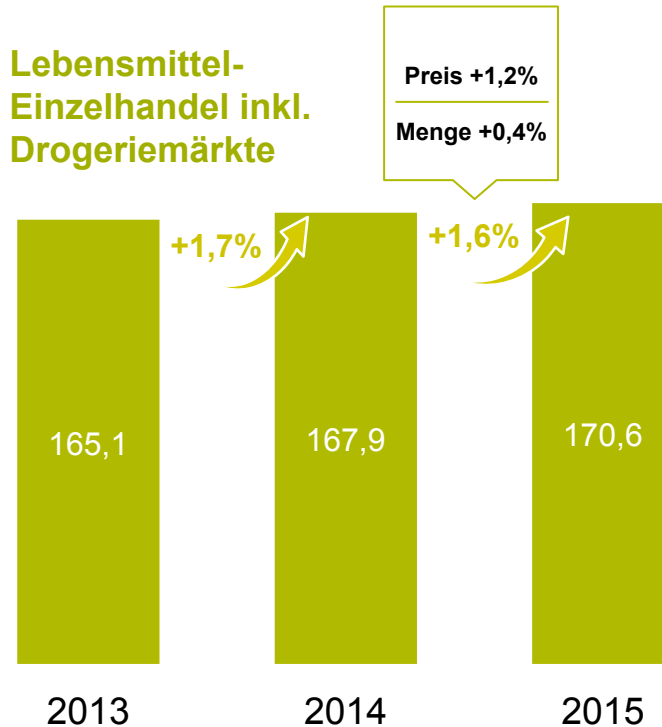
## Umsatz in Mrd. Euro



### Nonfood-Einzelhandel



### Lebensmittel-Einzelhandel inkl. Drogeriemärkte

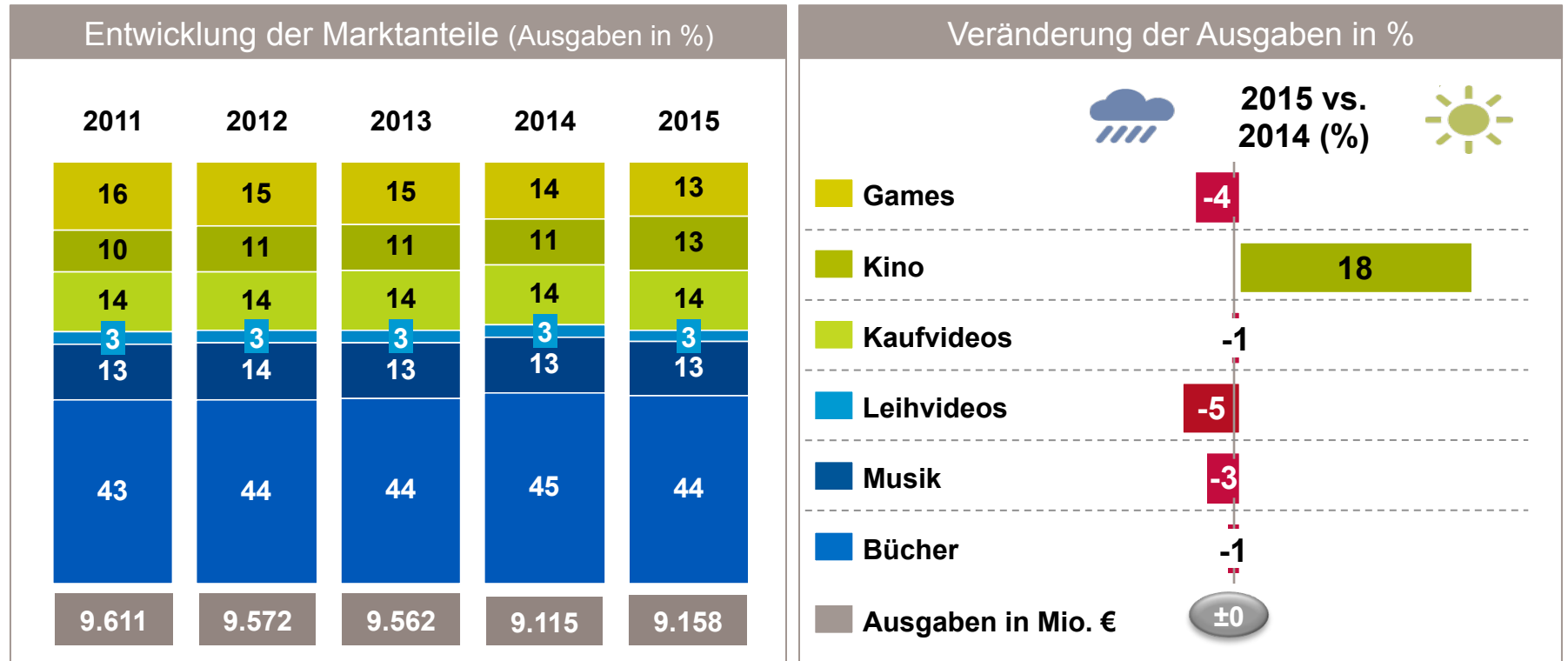


Quelle: GfK Consumerpanel Nonfood (2015 GfK Hochrechnung)/ GfK ConsumerScan, Bonsumme FMCG (inkl. Frische) vorläufig  
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# Die Ausgaben für Entertainmentprodukte



Gesamtmarkt inkl. Download ohne Streaming. Alle Zeiträume Januar-Dezember. Ausgaben in %

n 2015 = 131213

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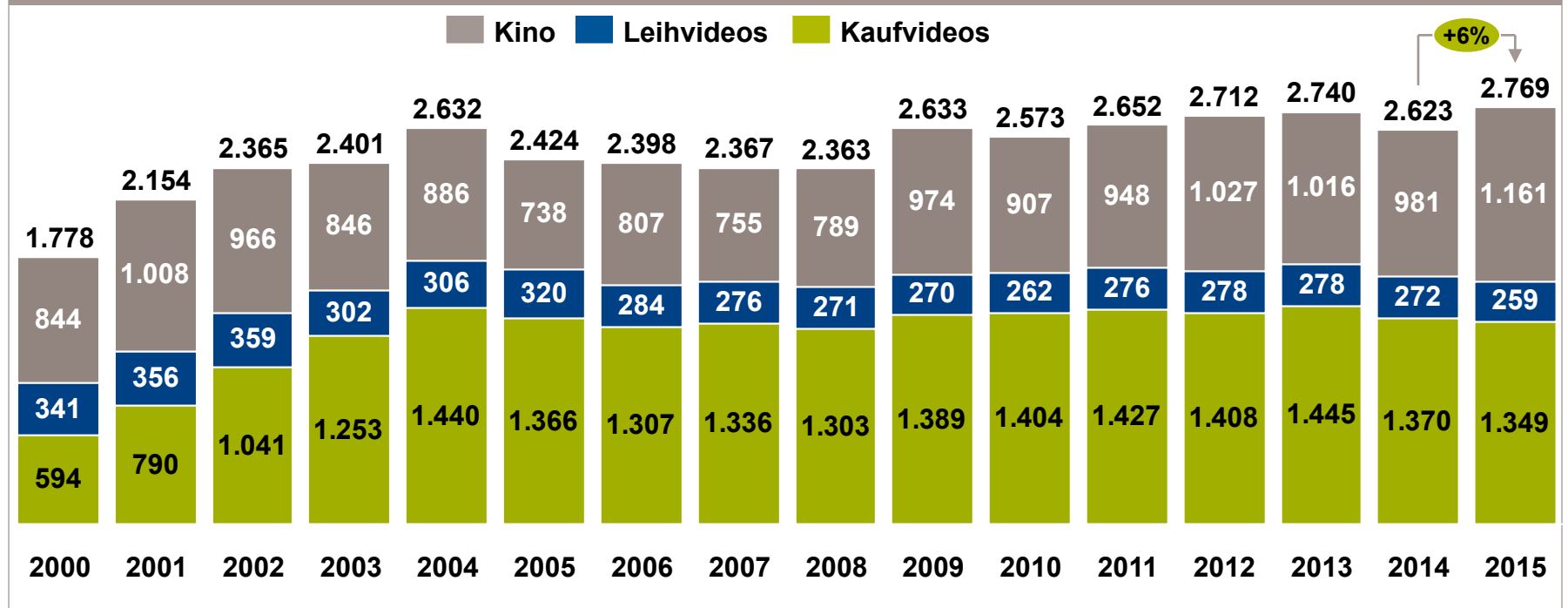
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# Kino & Video

# Dank des starken Kinojahres verzeichnet das Filmsegment ein Plus von 6 Prozent



## Entwicklung Kino/ Home Video 2000-2015



Kino/ Home Video; Alle Zeiträume: Januar-Dezember; Ausgaben in Mio. €

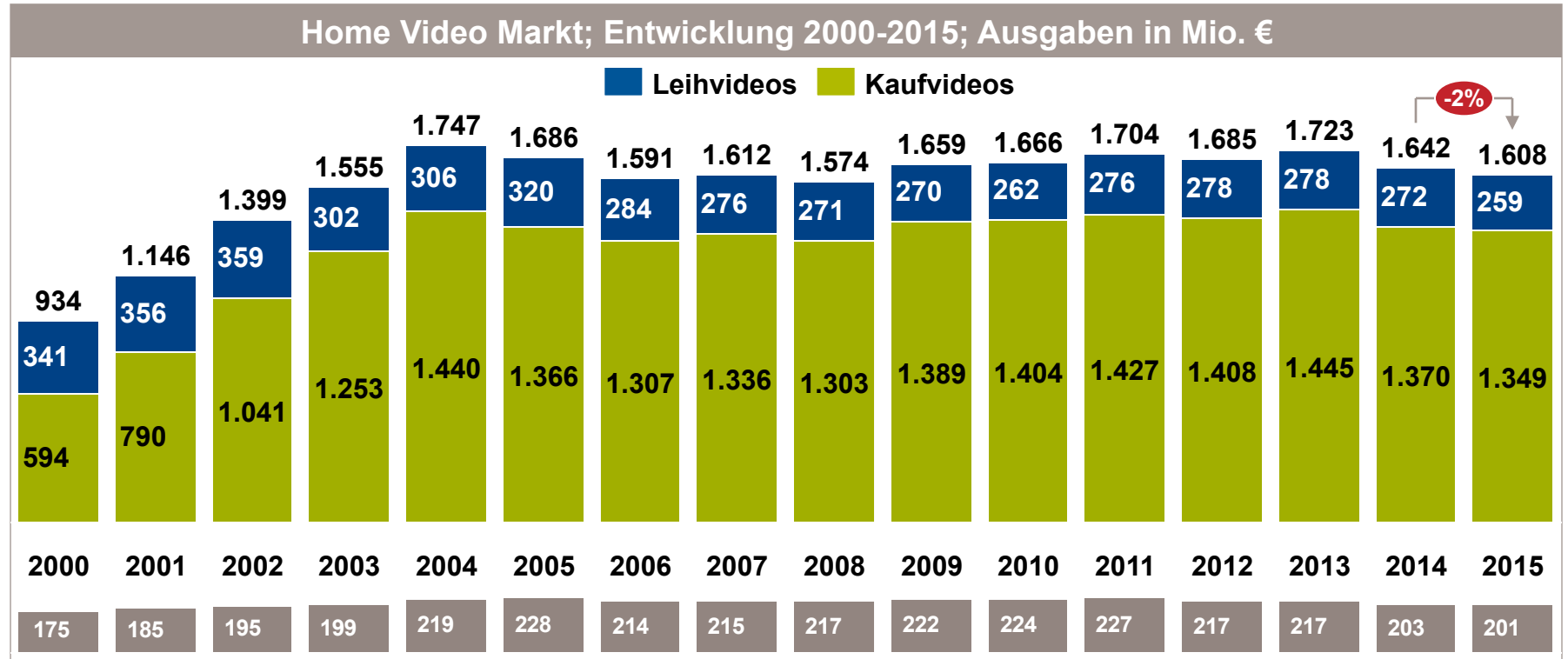
n 2015 = 50833

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# Home Videomarkt Total: Leichtes Minus auf hohem Niveau

# Home Video Markt: Leichtes Minus auf gleichbleibend hohem Niveau



Home Video physisch / digital exkl. SVoD; Alle Zeiträume: Januar-Dezember; Ausgaben in Mio. €

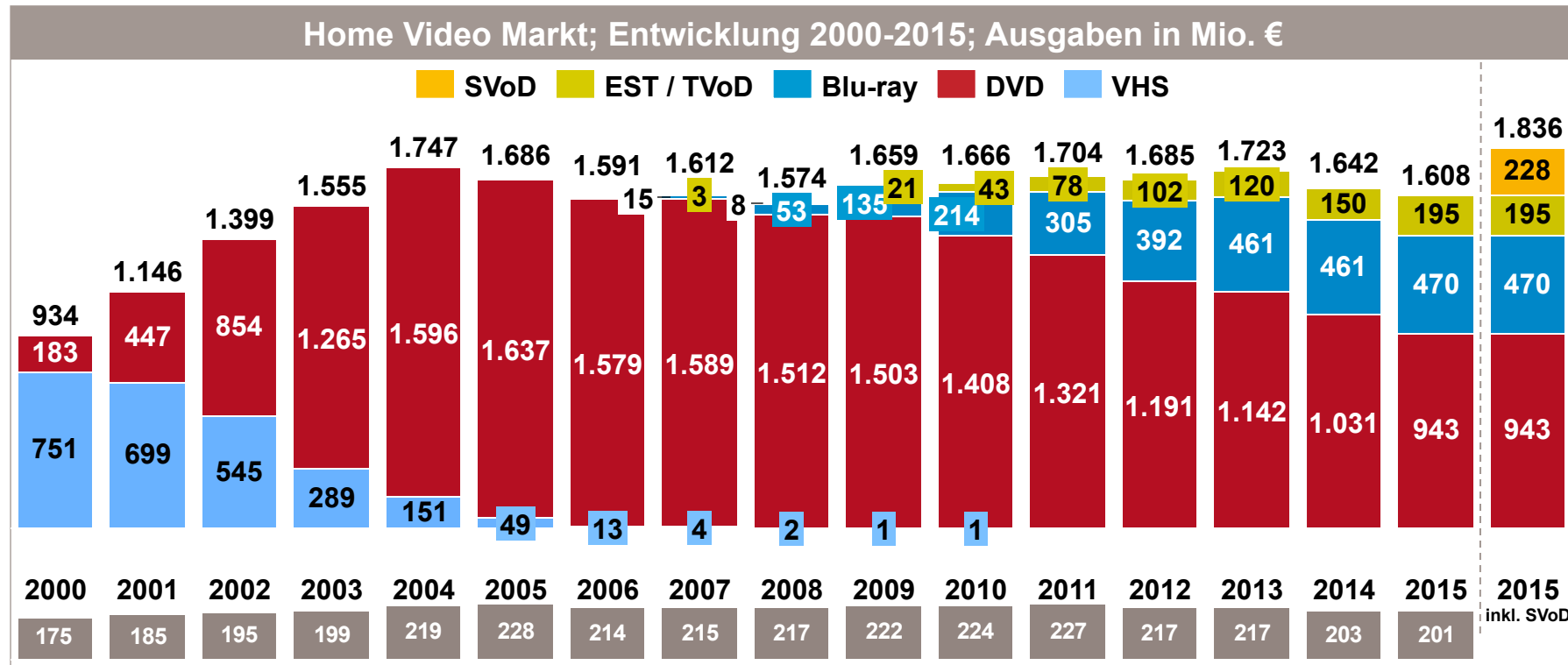
■ Absatz / Transaktionen in Mio.

n 2015 = 27756

© GfK 2016 im Auftrag der FFA | Der Videomarkt im Jahr 2015

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# Home Video Markt (ohne SVoD) mit leichtem Minus auf gleichbleibend hohem Niveau



Home Video physisch / digital exkl. SVoD; Alle Zeiträume: Januar-Dezember; Ausgaben in Mio. €

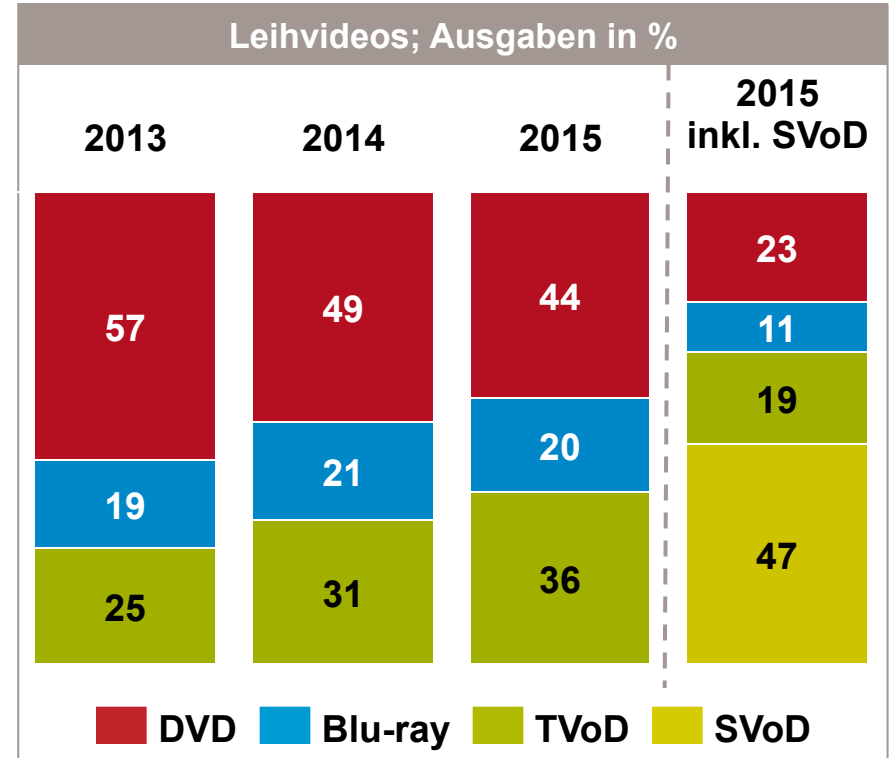
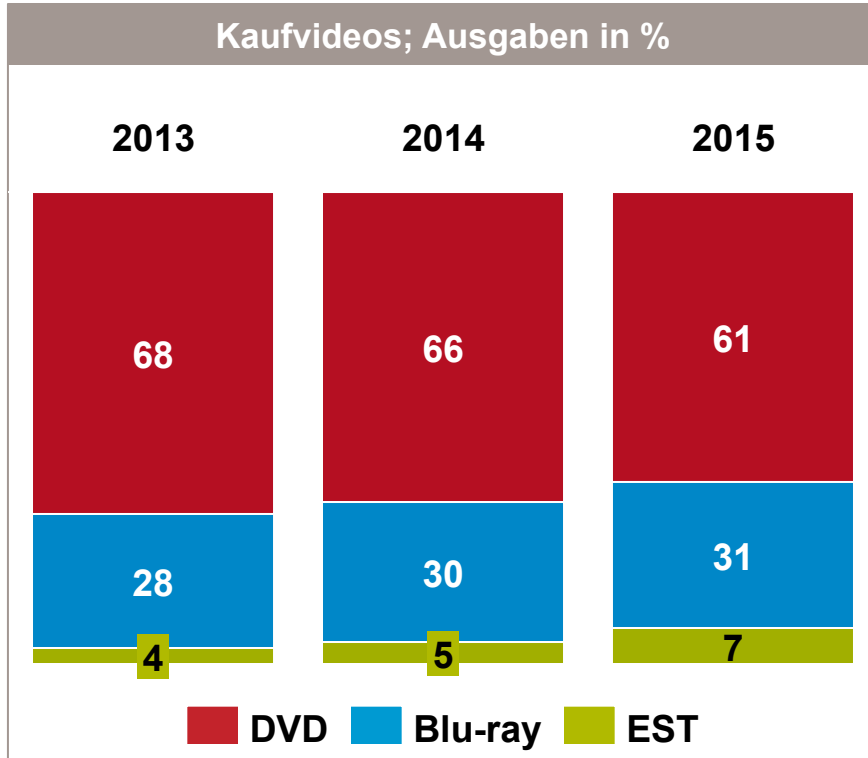
Menge / Transaktionen in Mio.

n 2015 = 27756

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# Verteilung der Formate im Videokauf und Videoleihmarkt



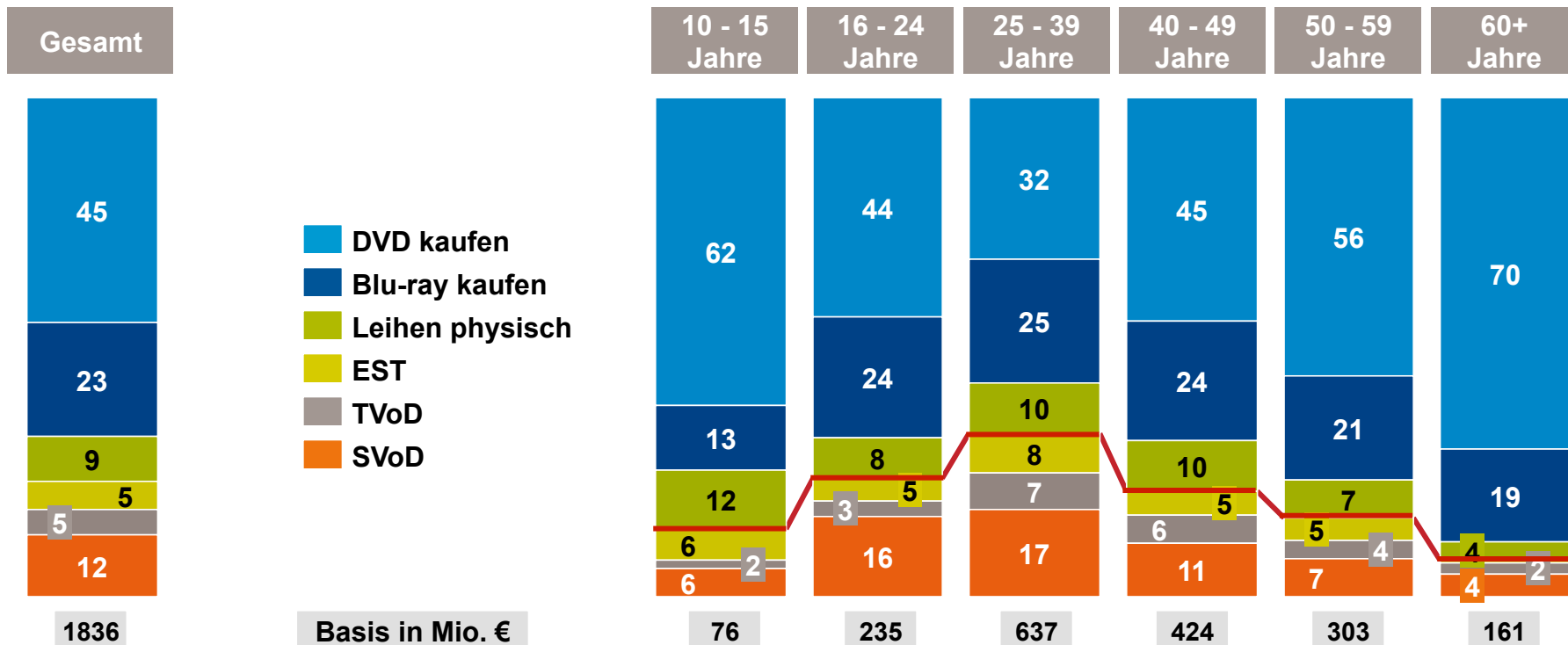
Home Video physisch / digital; Alle Zeiträume Januar – Dezember; Ausgaben in %

n 2015: Kaufvideos = 19582; Leihvideos = 8174

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Die DVD stellt in allen Zielgruppen weiterhin das wichtigste Format dar, digitale Formate erreichen mit 32% in der Gruppe der 25-39 Jährigen den höchsten Anteil.



Home Video physisch / digital; Alle Zeiträume Januar – Dezember; Ausgaben in %

n total = 42668

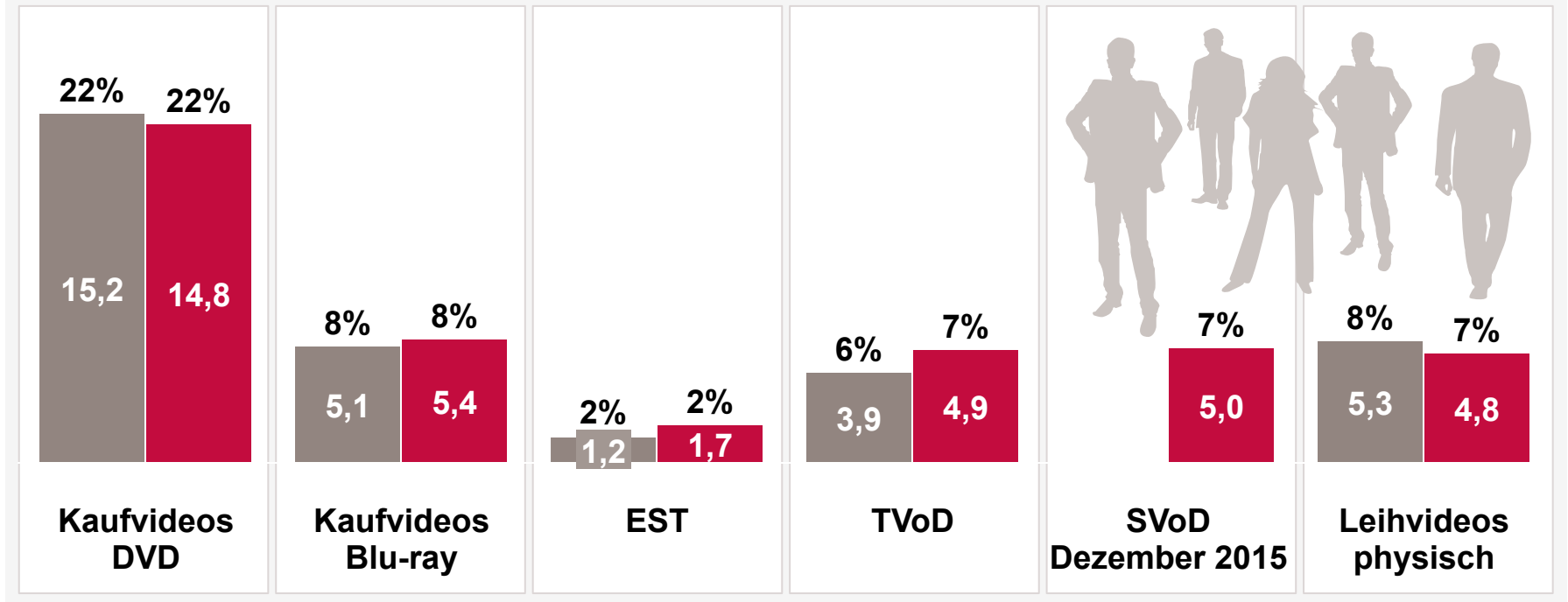
© GfK 2016 im Auftrag der FFA | Der Videomarkt im Jahr 2015

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# Aktive Videokonsumenten im Jahr 2014 und 2015

Reichweite in % / Personen in Mio.



Repräsentativ für die Dt. Bevölkerung ab 10 Jahren (2015 = 67,7 Mio. Pers.); Alle Zeiträume: Januar-Dezember

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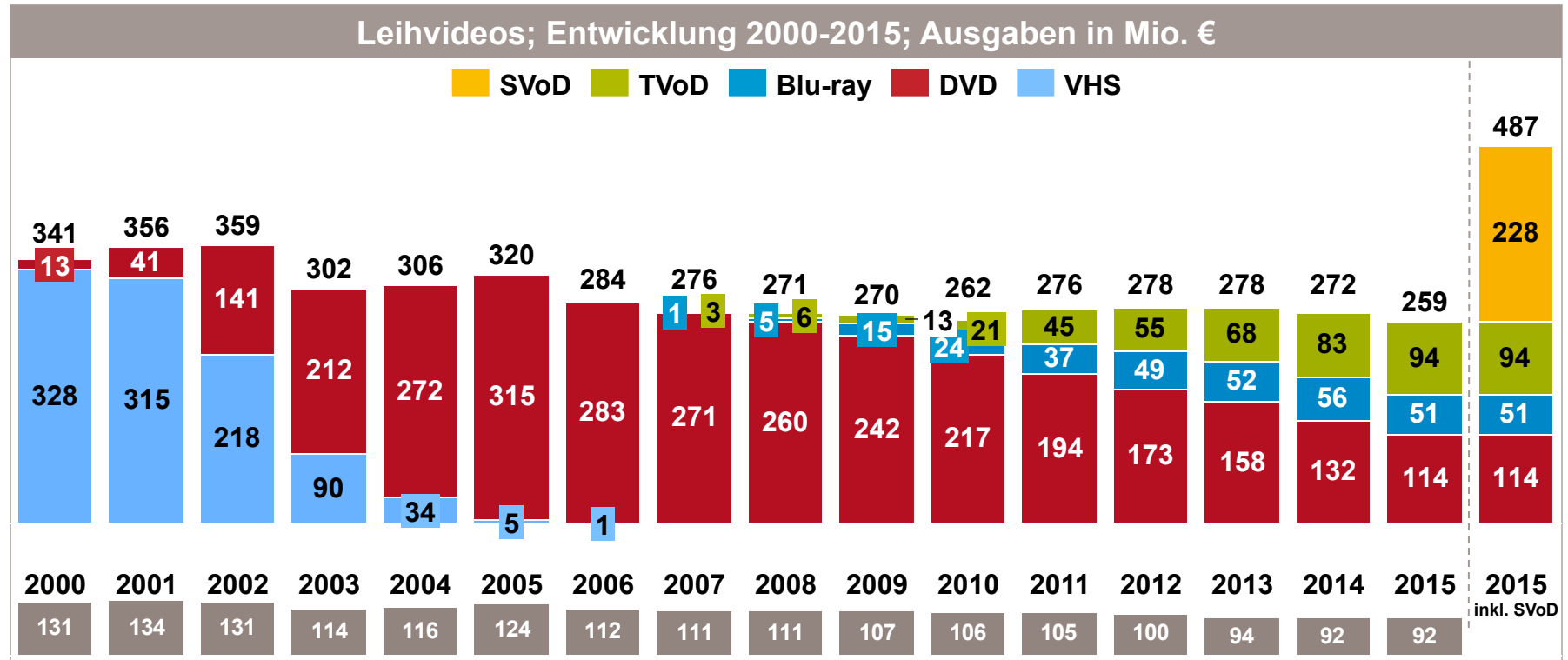
2014 2015

n Gesamt 2015 = 5141

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# Der Verleihmarkt

# Videoleihmarkt (ohne SVoD): Leicht rückläufiger Markt mit Verschiebungen in Richtung Video on Demand



Videoleihmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Ausgaben in Mio. €

■ Transaktionen in Mio.

n 2015 = 8174

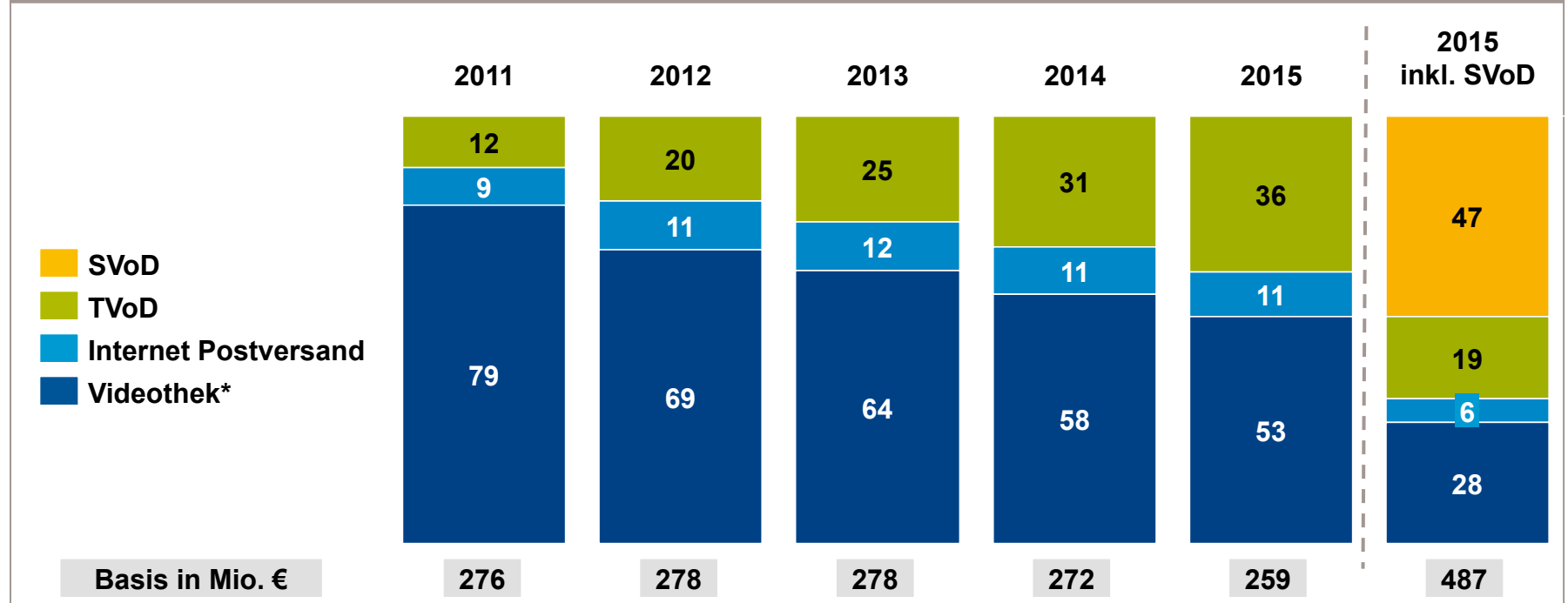
© GfK 2016 im Auftrag der FFA | Der Videomarkt im Jahr 2015

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# Videoleihmarkt: Auf Videotheken entfallen weiterhin rund die Hälfte der transaktionalen Ausgaben. Inkl. SVoD entfallen zwei Drittel der Ausgaben auf VoD-Modelle.



Vertriebsschienen (Ausgaben in %); Leihvideos



Videoleihmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Ausgaben in %

© GfK 2016 im Auftrag der FFA | Der Videomarkt im Jahr 2015

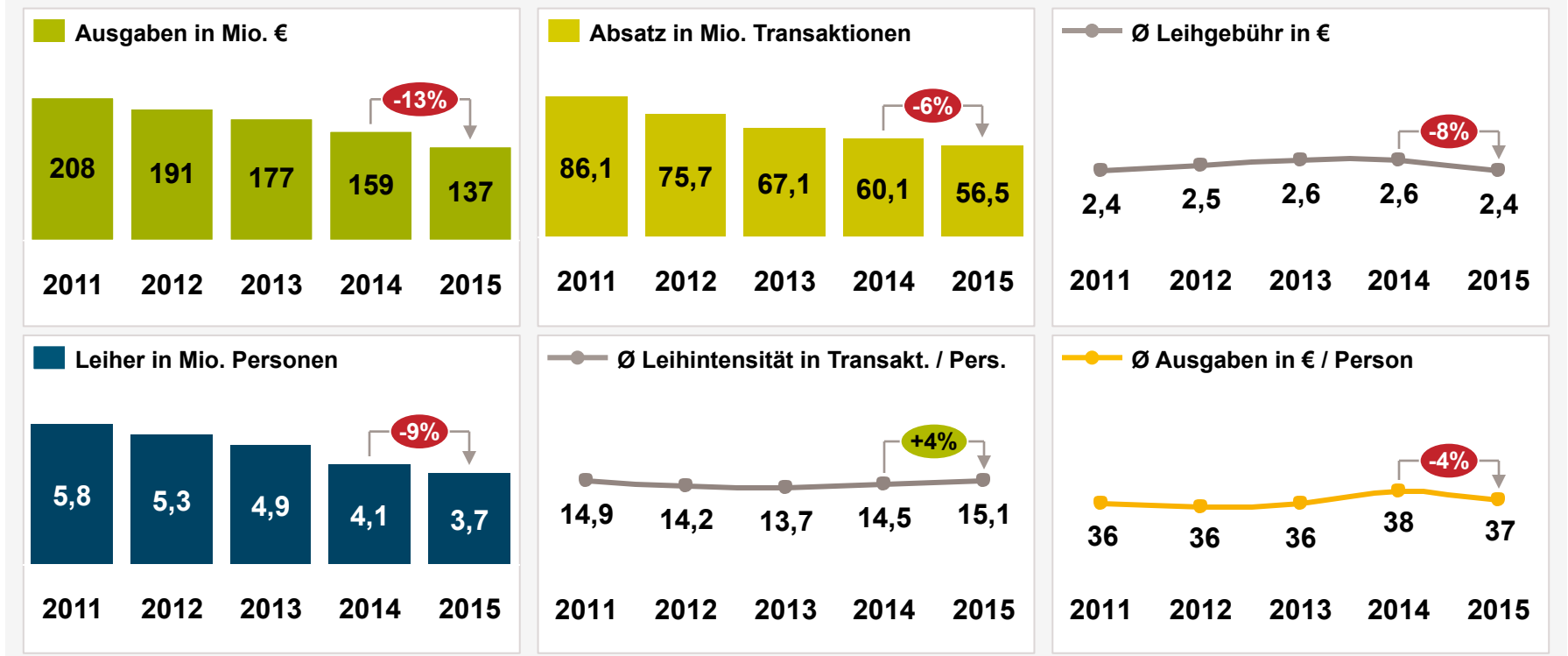
n 2015 = 8174

\*Videothek inkl. Automat

Please note that in particular situations, for example at a high degree of specification, comparatively low number of counts can occur which may limit the accuracy of the interpretation to some extent.

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# Videothek im 5-Jahresvergleich



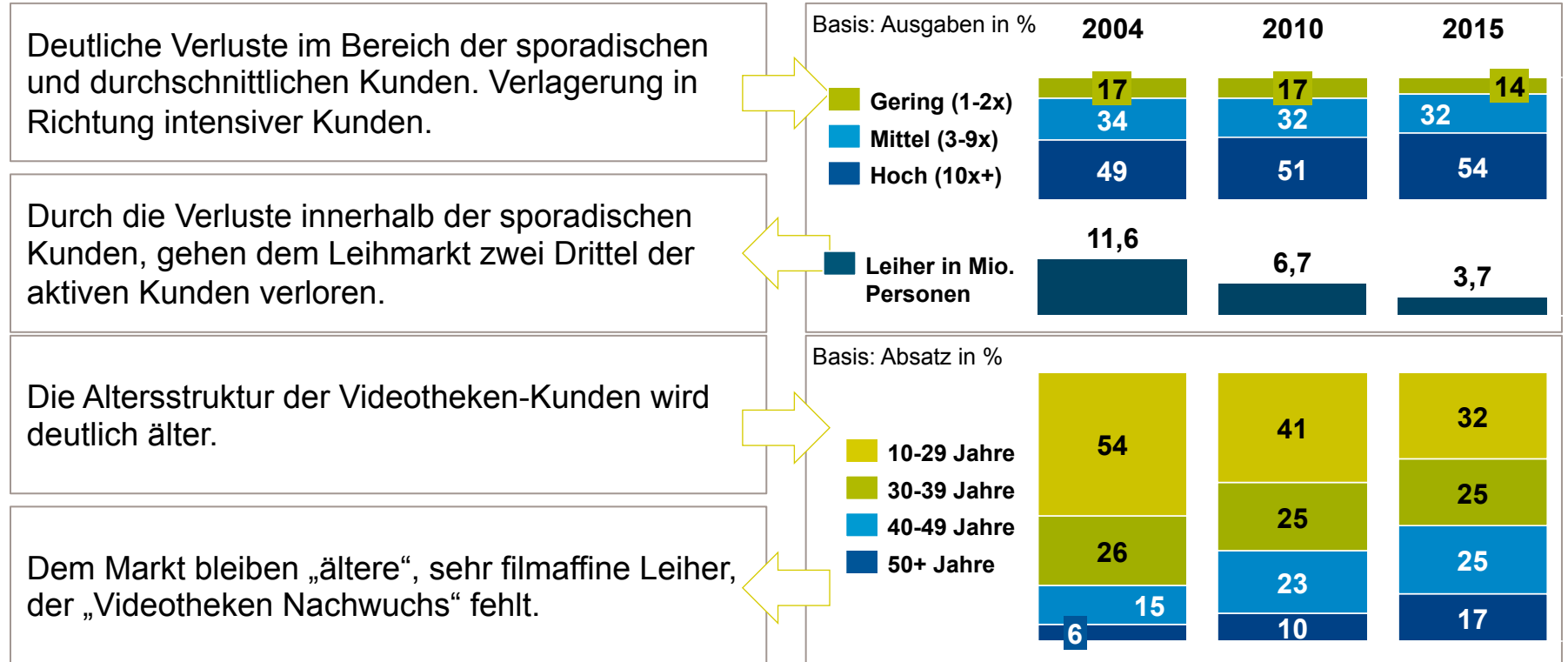
Videoleihmarkt physisch, Videothek (inkl. Automat); Alle Zeiträume: Januar-Dezember

n 2015 = 2090

© GfK 2016 im Auftrag der FFA | Der Videomarkt im Jahr 2015

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# Bestandsaufnahme Videotheken (inkl. Automaten)



Videoleihmarkt Videothek (inkl. Automat); Alle Zeiträume: Januar-Dezember

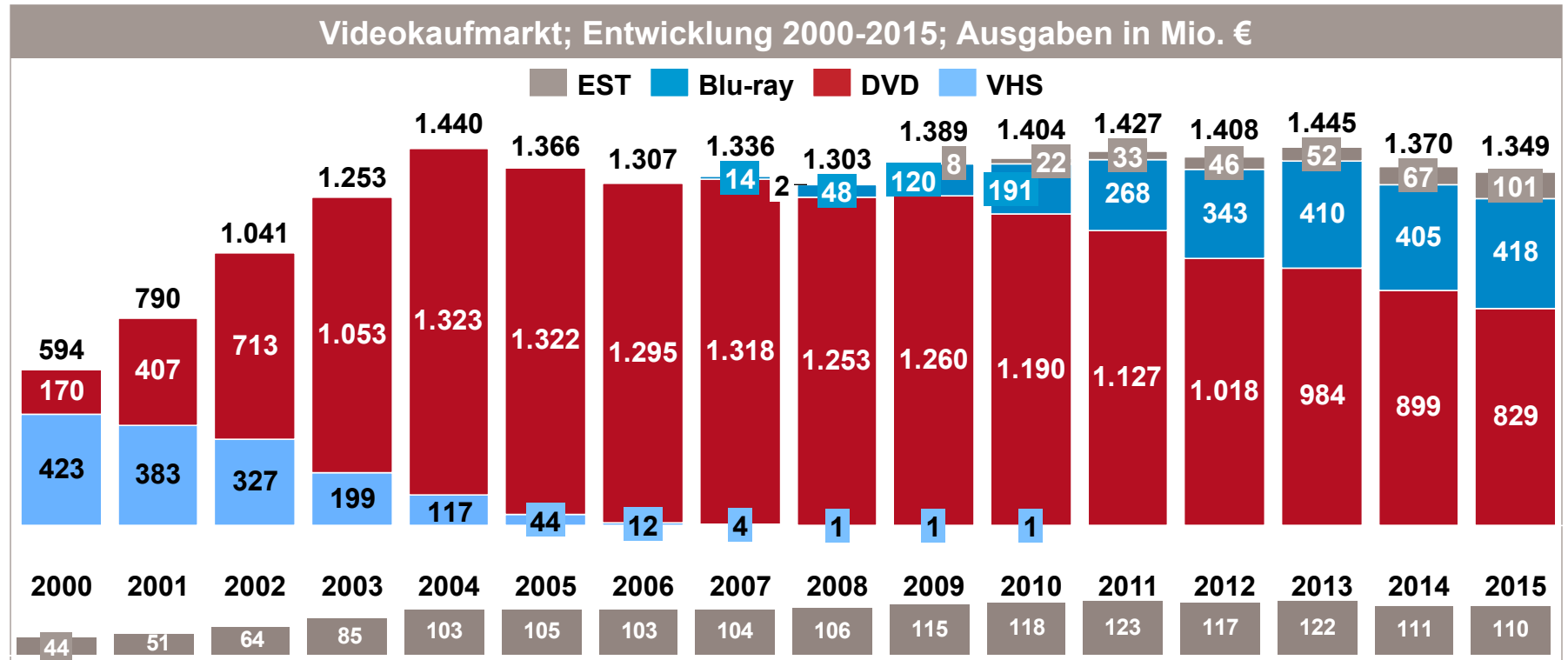
n 2015 = 2090

© GfK 2016 im Auftrag der FFA | Der Videomarkt im Jahr 2015

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# Der Videokaufmarkt

# Videokaufmarkt: Leichter Rückgang auf hohem Niveau



Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Ausgaben in Mio. €

■ Absatz in Mio. Stück

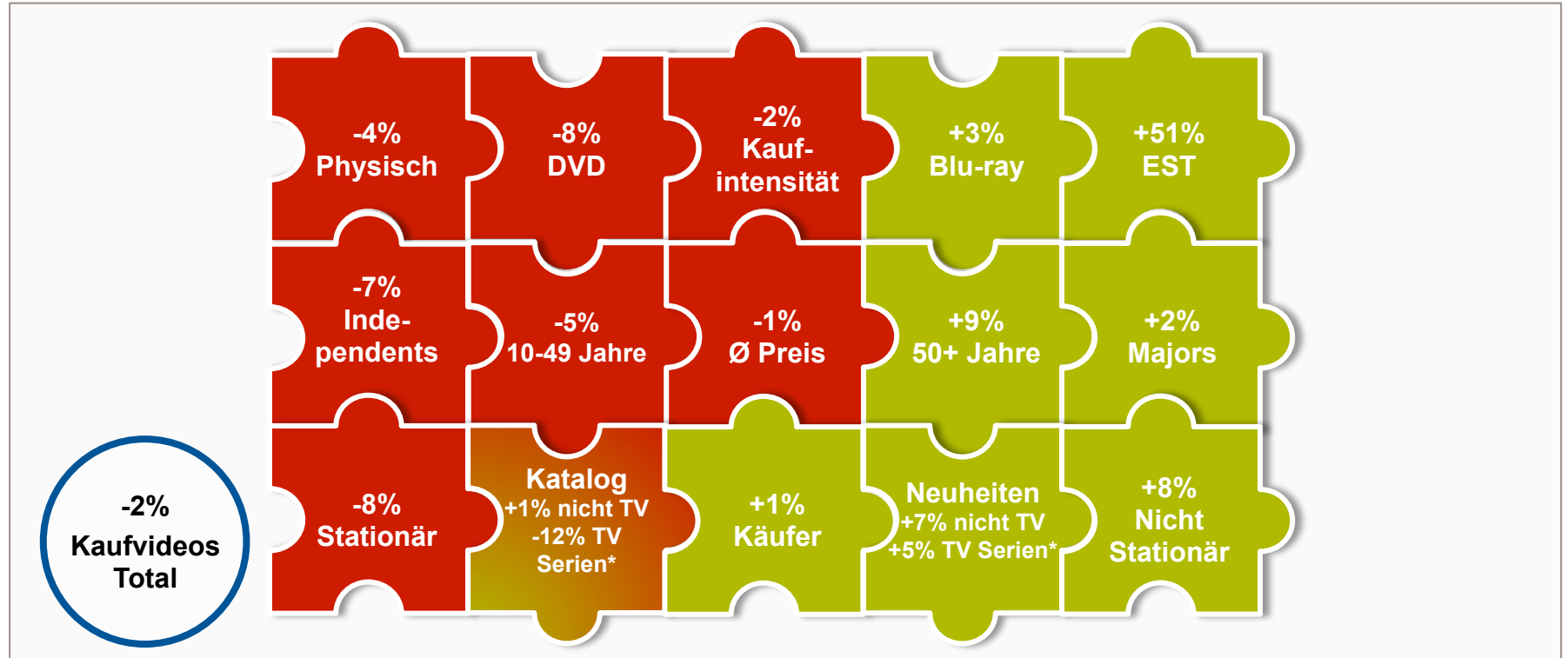
n 2015 = 19582

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# Kaufvideos: Die wichtigsten Marktentwicklungen



Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Ausgaben in Mio. €

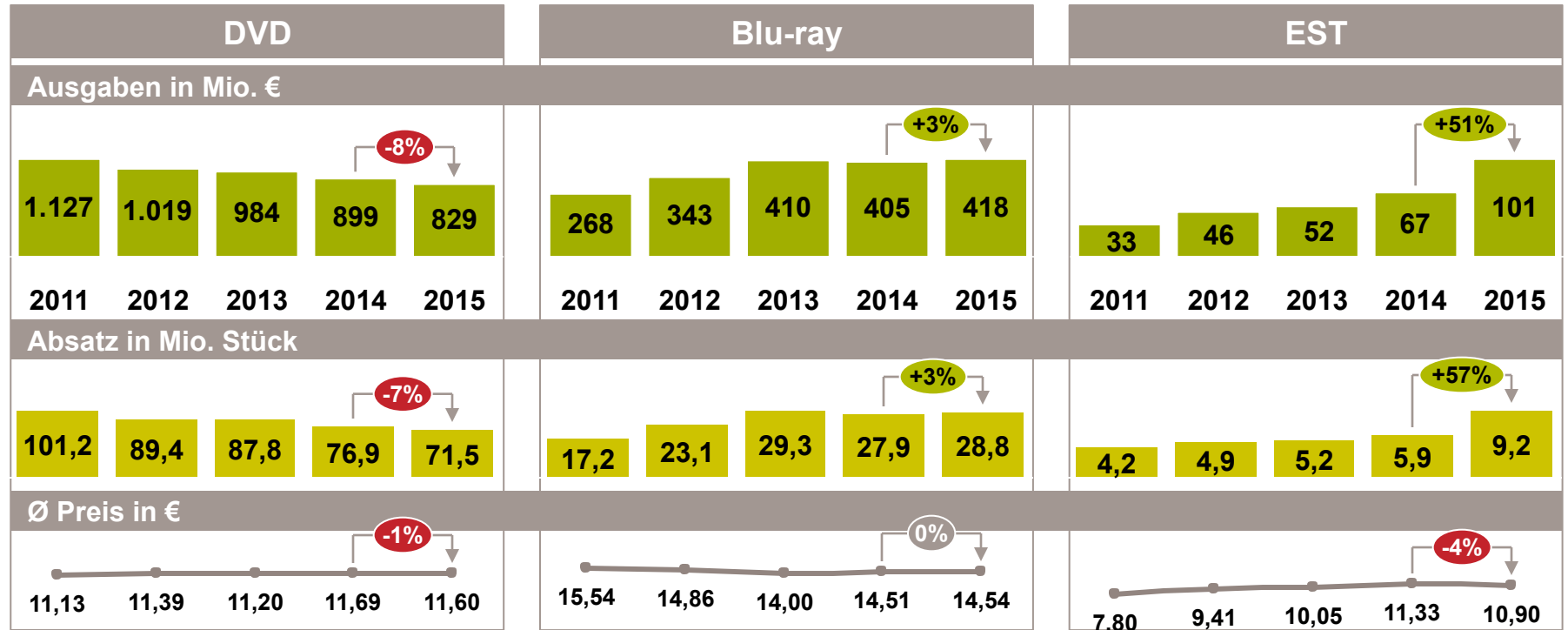
n 2015 = 19582

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# Formate

# Entwicklung nach Formaten



Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember

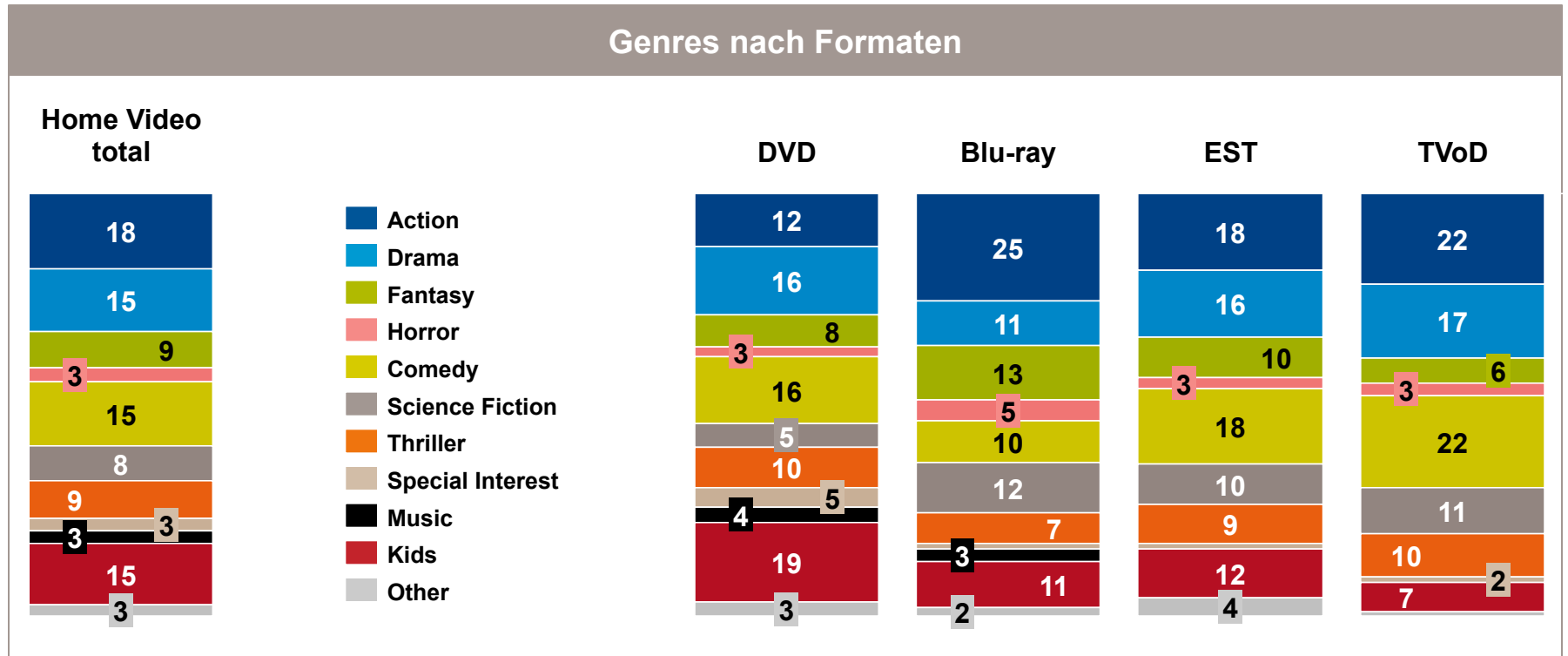
n 2015: DVD = 13314; Blu-ray = 5534; EST = 734

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# Genres nach unterschiedlichen Formaten



Home Video physisch / digital; Zeitraum: Januar-Dezember 2015; Ausgaben in %

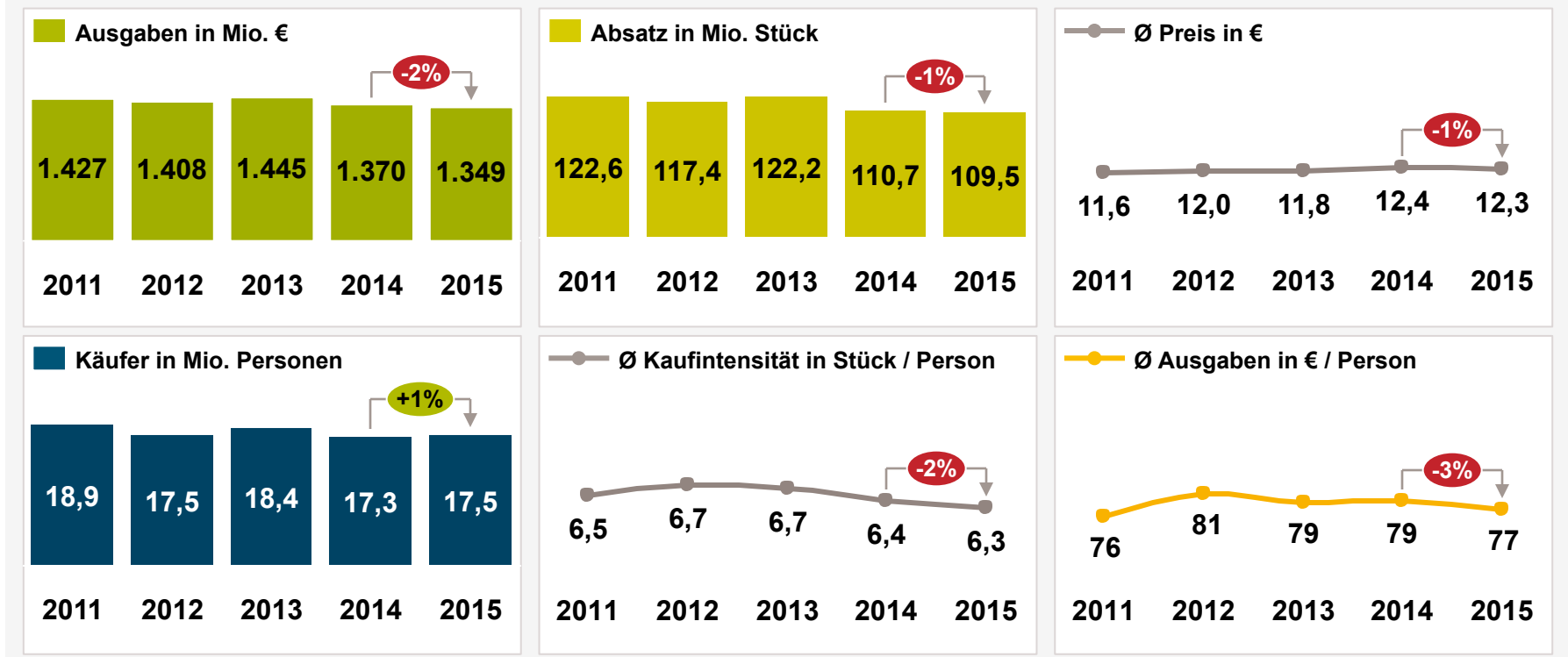
n total = 27756

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# Käufer und Reichweite

# Kennzahlen Videokaufmarkt im 5-Jahresvergleich



Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember

n 2015 = 19582

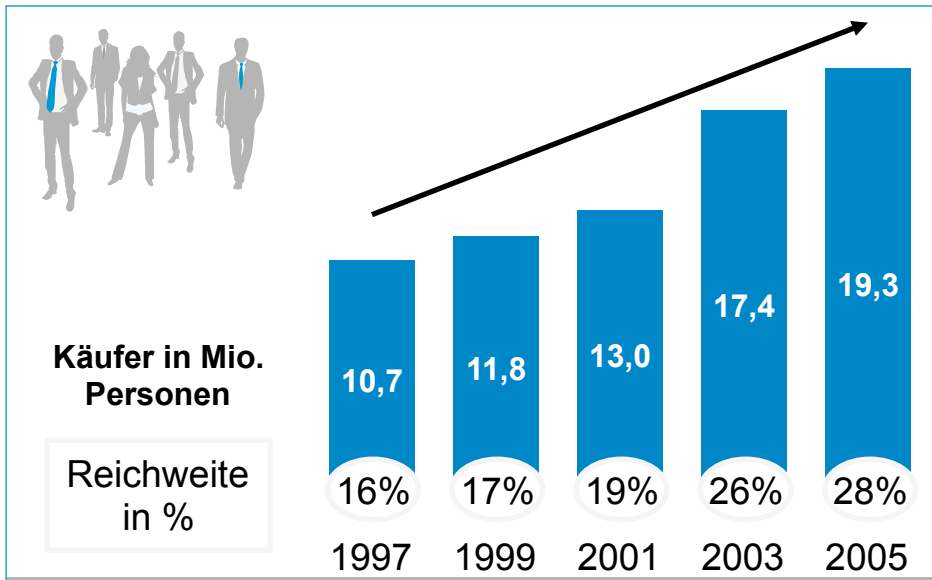
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Käuferreichweite im Videokaufmarkt. 17,5 Mio. Aktive Käufer im Jahr 2015, dies entspricht einer Reichweite von 26%.

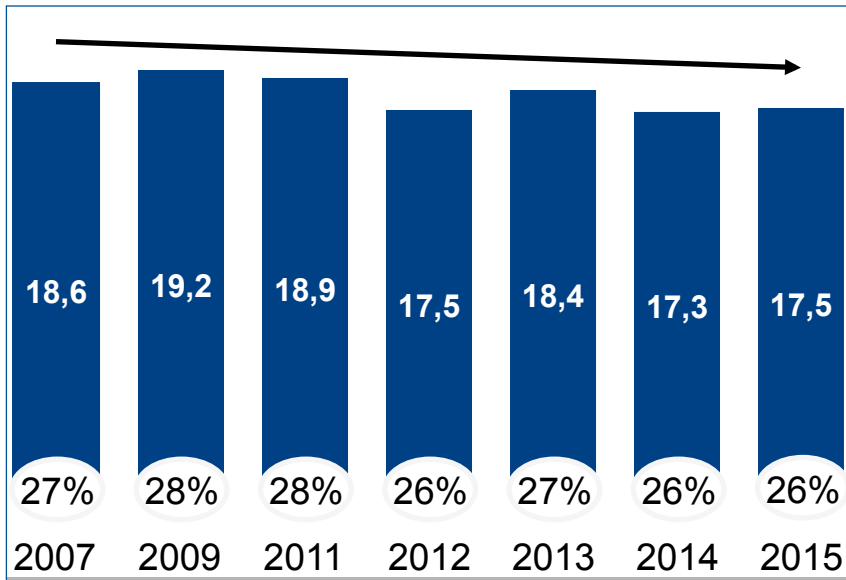


## Markterweiterung



Die Digitalisierung des Marktes durch die DVD lässt die Käuferreichweite auf knapp 30% steigen

## Stagnation



Blu-ray und EST haben keinen positiven Effekt auf die Käuferreichweite

Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Käufer in Mio. Personen

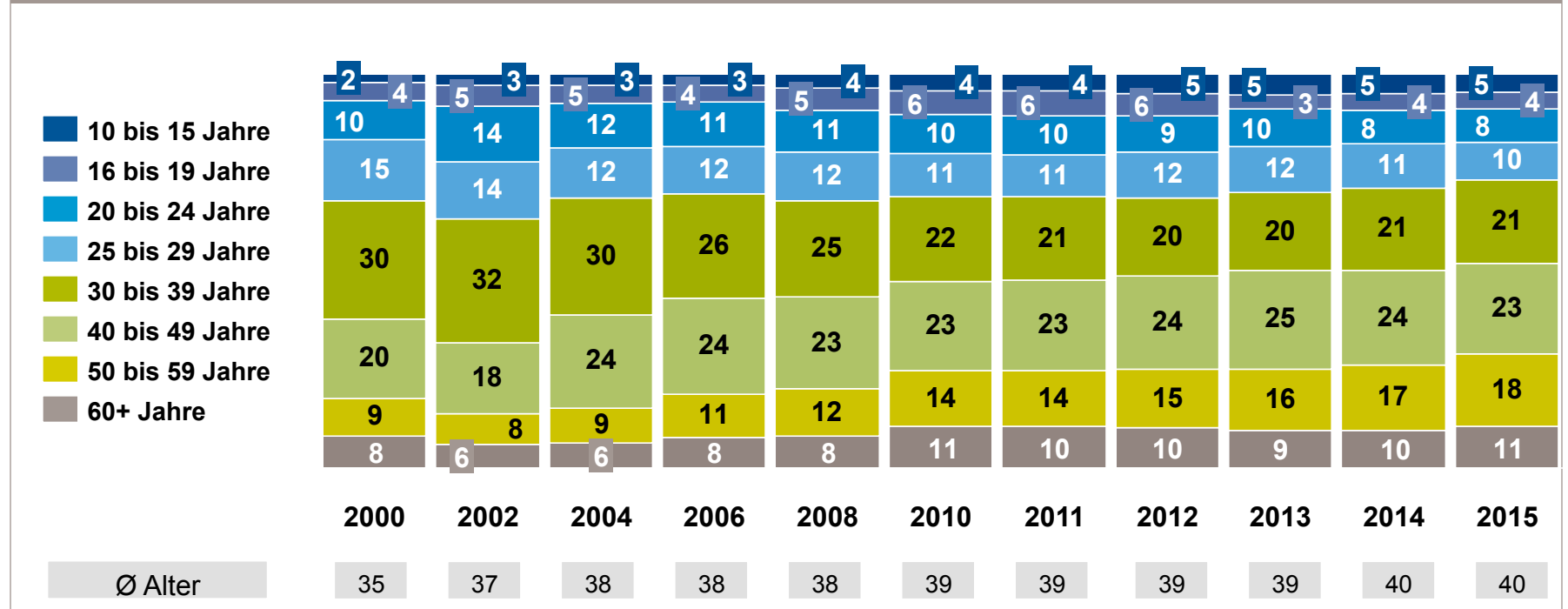
n 2015 = 19582

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# Videokaufmarkt: Käuferstruktur im Zeitverlauf

Kaufvideos; Käuferalter 2000-2014; Ausgaben in %



Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Ausgaben in %

n 2015 = 19582

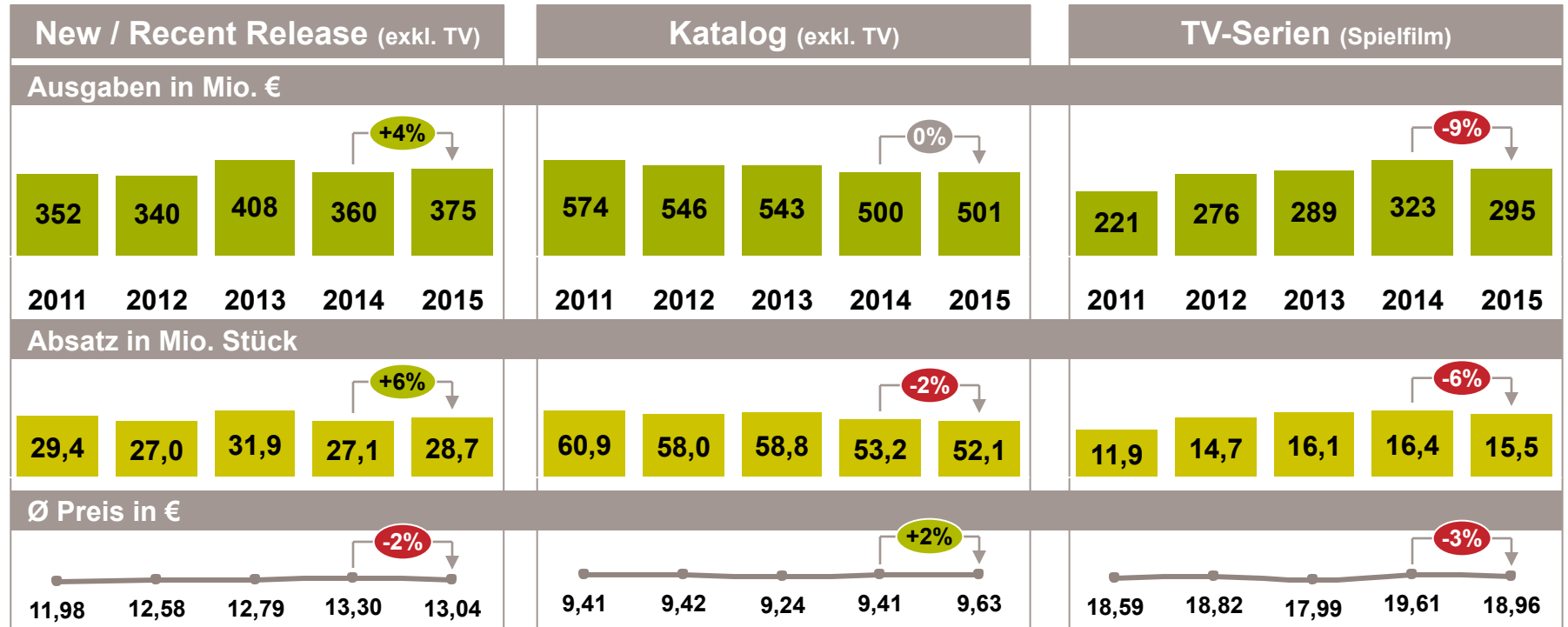
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# Entwicklung nach Teilmärkten

# Videokaufmarkt: Entwicklung nach Teilmärkten



Videokaufmarkt physisch / digital Spielfilm / Kinder; Alle Zeiträume: Januar-Dezember

n 2015: New / Recent Release= 4976; Katalog = 9120; TV-Serien = 2944

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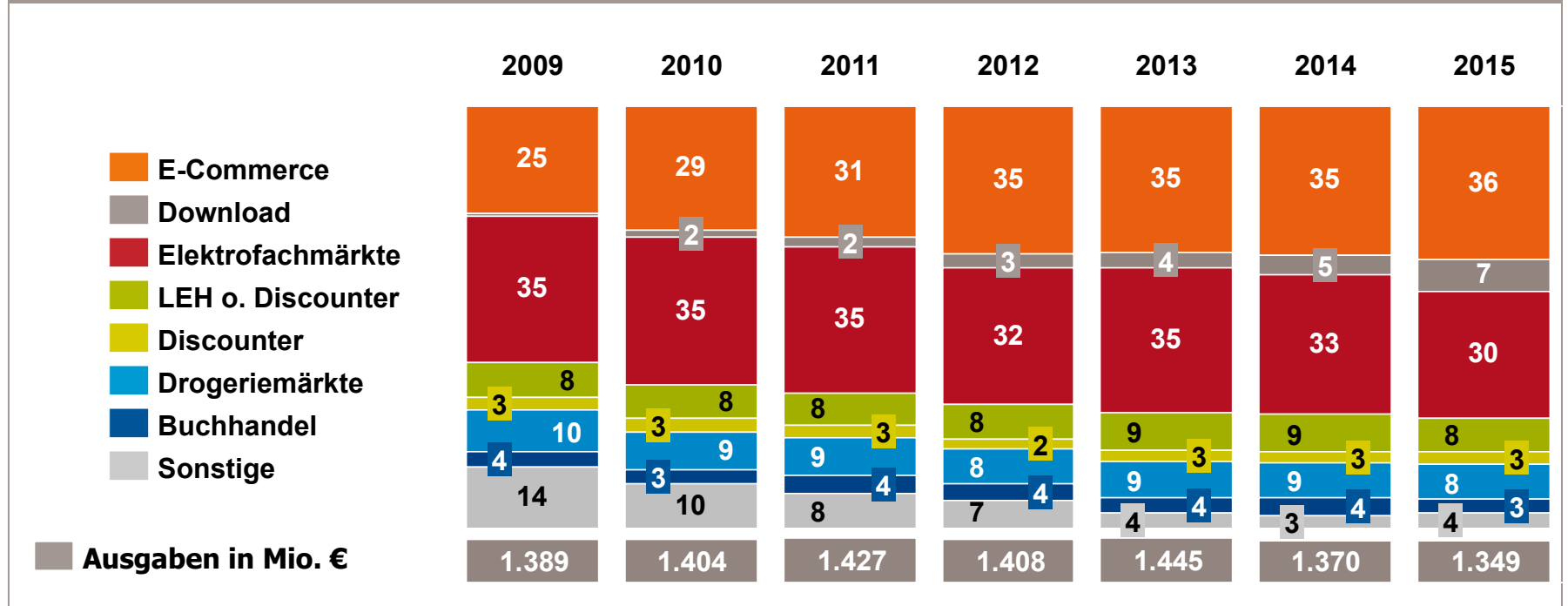
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# Distribution

# In einem leicht rückläufigen Markt gewinnen Download und E-Commerce Marktanteile



## Ausgabenanteile der Vertriebskanäle im Videokaufmarkt Januar-Dezember



Videokaufmarkt physisch / digital; Alle Zeiträume: Januar-Dezember; Ausgaben in %

n 2015 = 19582

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# Toplisten DVD / Blu-ray 2015

# Top 10 DVD / Blu-ray Kinospieelfilm 2015

Basis Handelspanel Units 100%

Pos.	Titel*	Publisher
1	Honig im Kopf	Warner Home Video
2	Der Hobbit: Die Schlacht der fünf Heere	Warner Home Video
3	Fifty Shades of Grey - Geheimes Verlangen	Universal
4	Die Eiskönigin - Völlig unverfroren	Walt Disney Studios Home Entertainment
5	Die Tribute von Panem - Mockingjay, Teil 1	STUDIOCANAL
6	Guardians of the Galaxy	Walt Disney Studios Home Entertainment
7	Jurassic World	Universal
8	Fast & Furious 7	Universal
9	Minions	Universal
10	Interstellar	Warner Home Video

\* Alle EANs/physische Abverkäufe Panel 100% hochgerechnet/alle Versionen (DVD/BD) auf Produkt/Titel zusammengefasst

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# Top 10 DVD / Blu-ray Special Interest 2015

Basis Handelspanel Units 100%

Pos.	Titel*	Publisher
1	Jillian Michaels - Shred: Schlank in 30 Tagen	Polyband
2	Dragonball Z: Kampf der Götter	universum film
3	FIFA WM 2014 - Alle Highlights	Studio Hamburg Enterprises
4	Die Mannschaft	Studio Hamburg Enterprises
5	Wacken - Der Film	Warner Home Video
6	Das Salz der Erde	EuroVideo Medien GmbH
7	Nowitzki. Der perfekte Wurf	EuroVideo Medien GmbH
8	Jillian Michaels - Bauch, Beine, Po intensiv	WVG Medien
9	Yogaworks - Das Basisprogramm	Polyband
10	Best of FC Bayern München	Lighthouse Home Entertainment

\* Alle EANs/physische Abverkäufe Panel 100% hochgerechnet/alle Versionen (DVD/BD) auf Produkt/Titel zusammengefasst

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# Top 10 DVD / Blu-ray TV-Serien 2015

Basis Handelspanel Units 100%

Pos.	Titel*	Publisher
1	Game of Thrones - Season 4	Warner Home Video
2	Game of Thrones - Season 1	Warner Home Video
3	Game of Thrones - Season 2	Warner Home Video
4	Game of Thrones - Season 3	Warner Home Video
5	The Walking Dead - Season 5	WVG Medien
6	Downton Abbey - Season 5	Universal
7	The Big Bang Theory - Season 7	Warner Home Video
8	Outlander - Season 1.1	Sony Pictures Home Entertainment
9	True Detective - Season 1	Warner Home Video
10	The Big Bang Theory - Season 8	Warner Home Video

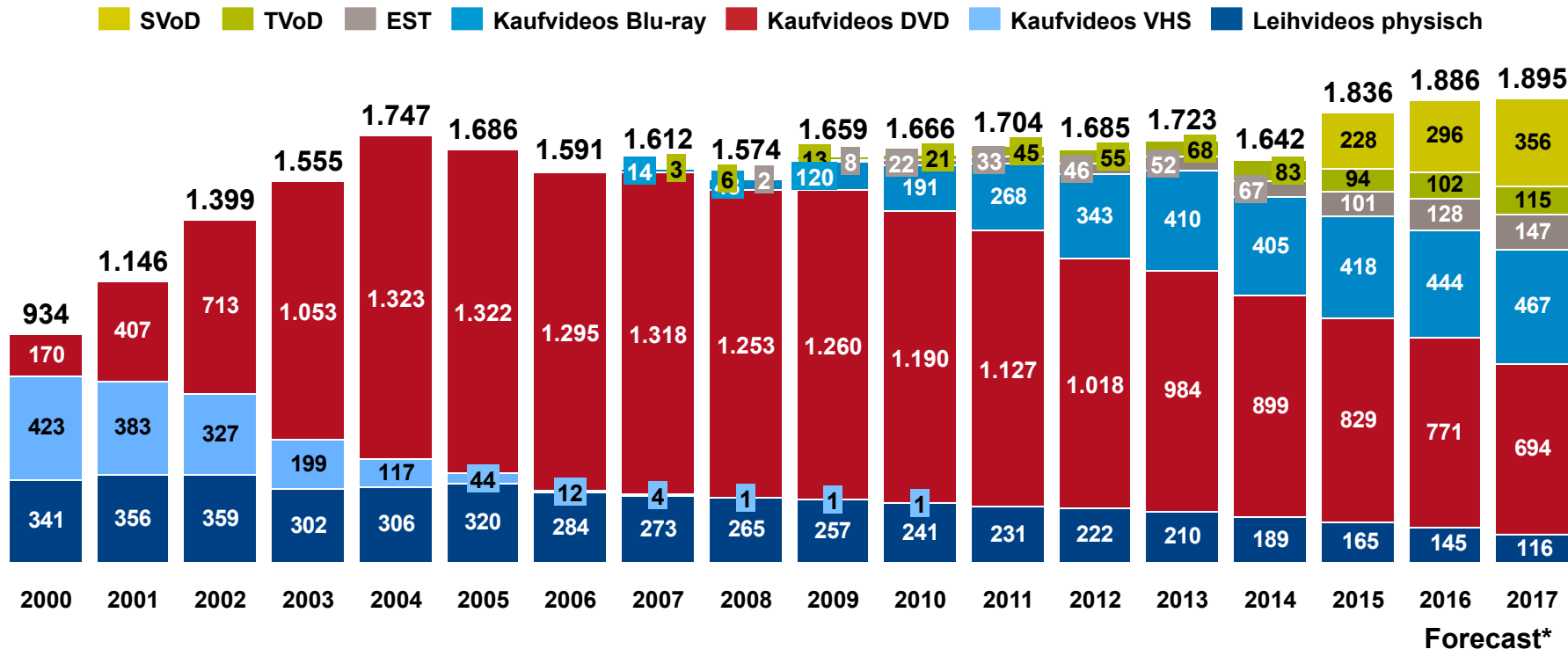
\* Alle EANs/physische Abverkäufe Panel 100% hochgerechnet/alle Versionen (DVD/BD) auf Produkt/Titel zusammengefasst

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# Forecast

# Forecast Home Video: Anhaltende Zuwächse im digitalen Bereich, zwei Drittel werden weiterhin über physische Formate generiert.



\* Prognose erstellt im Februar 2016 basierend auf Jahresdaten 2015  
 Home Video physisch / digital; Ausgaben in Mio. €; SVoD ab 2015  
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n 2015 = 42668

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