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## Press Release

# Analysis of the actual utilization of video content in 2021 Video on demand services continue to make great strides

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**Tokyo, December 10th, 2021** - GEM Partners has published a report called "Video on demand / Broadcast / Physical home video market user analysis report in Japan (Surveyed in November 2021)" an analysis report on the actual usage of video content.

The survey revealed that the usage rate of subscription video on demand (SVOD) and free video on demand (AdVOD) services, which had been on a marked upward trend since the Covid-19 pandemic, has further increased since the previous year's survey (October 2020). In this article, we inform you of the actual status of user usage based on excerpts from the report, focusing on the trend of the usage rate across the type of contract and type of media, as well as the average number of SVOD services used.

### [Survey Highlights]

- **The usage rates for the fast-growing SVOD and AdVOD services increased further from the previous year, when they grew rapidly, reaching 35.2% and 57.4%, respectively.**
- **The DVD/BD rental market continued to shrink, while the DVD/BD purchase market declined this year after remaining flat in the previous year.**
- **The average number of services used by SVOD users was 1.7, unchanged from the previous year. The overall market increased by 0.1 units from the previous year to an average of 0.7 subscriptions.**

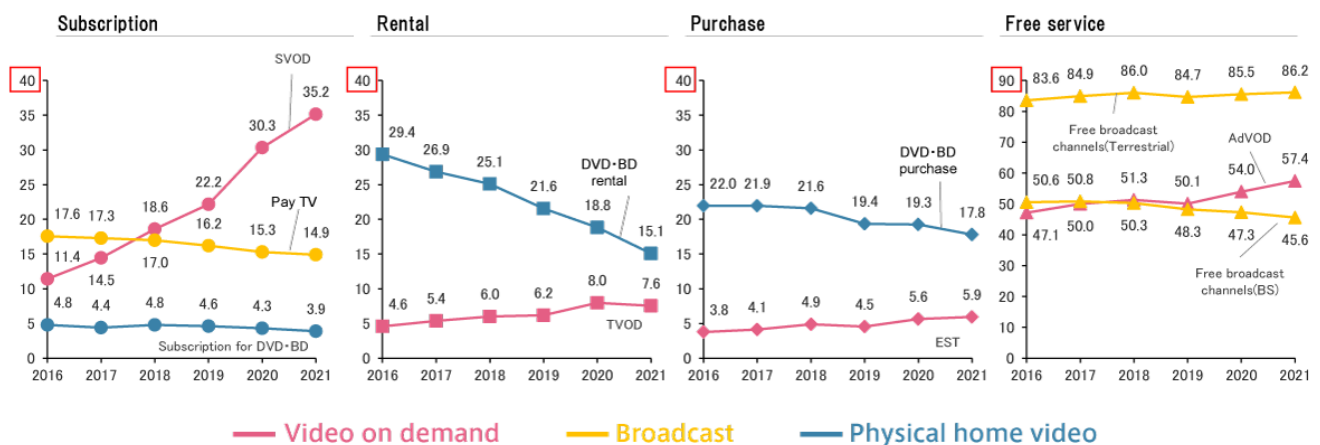
## Service category: Categorization per type of contract and Type of media

		Type of contract			
		● Subscription	■ Rental	◆ Purchase	▲ Free service
Type of media	Video on demand(VOD)	● SVOD※1	■ TVOD※2	◆ EST※3	▲ AdVOD※4
	Broadcast	● Pay TV	-	-	▲ Free broadcast channels Terrestrial/BS
	Physical home video	● Subscription for DVD・BD	■ DVD・BD rental	◆ DVD・BD purchase	-

Source: "Video on demand / Broadcast / Physical home video market user analysis report in Japan (Surveyed in November 2021)," ■ GEM Standard

The report takes a broad view of the market by combining the type of contract (Subscription, Rental, Purchase, and Free service) and type of media (Video on demand, Broadcast, and Physical home video) as shown below, surveying 19,784 men and women aged 15-69 in Japan.

## Changes in utilization rate per type of contract (%, Target for summing up: All respondents)



Source: "Video on demand / Broadcast / Physical home video market user analysis report in Japan (Surveyed in November 2021)," ■ GEM Standard

The usage rates for the fast-growing SVOD and AdVOD services increased further from the previous year, when they grew rapidly, reaching 35.2% and 57.4%, respectively.

Usage rates were surveyed by type of contracts, such as Subscription, Rental, Purchase, and Free service. The largest increase was SVOD seen in the "Subscription" <Video on demand> category, rising 4.8 pt\* from the previous year to 35.2%. SVOD, which includes Amazon Prime Video, Netflix, and other services, has grown rapidly in the 2020 survey by +8.1 ppt from the previous year, and its value is growing unabated.

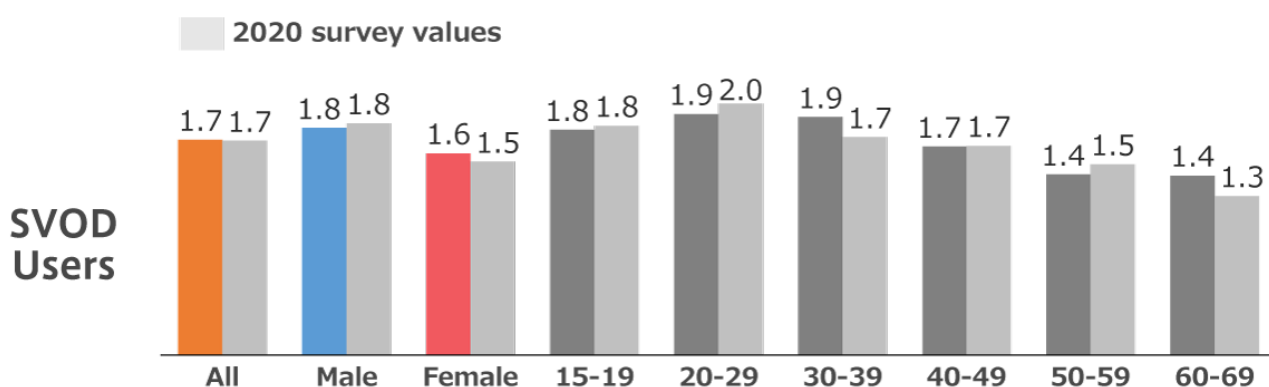
\*Rounding has resulted in the first decimal place not matching the difference from the previous year's apparent figure.

AdVOD, the "Free Service" <Video on demand>, is also growing in usage. AdVOD, which includes YouTube, TVer, TikTok, etc., increased +3.9 pt over 2019 in the Covid-19 pandemic the previous year, and this year the value has also increased +3.4 pt over the previous year, to 57.4%.

### The DVD/BD rental market continued to shrink, while the DVD/BD purchase market declined this year after remaining flat in the previous year.

On the other hand, the usage rate of <Physical home video> is on a downward trend. In particular, DVD/BD rentals in the "Rental" category have continued to shrink since 2016, at -3.7 pt year-on-year. The usage rate for DVD/BD purchases, which has fluctuated little, also declined this year, falling 1.5 ppt from the previous year. It can be inferred that the shift from physical to digital, especially SVOD, is accelerating.

## Average number of SVOD services used



Source: "Video on demand / Broadcast / Physical home video market user analysis report in Japan (Surveyed in November 2021)," GEM Standard

The average number of services used by SVOD users was 1.7, unchanged from the previous year. The overall market increased by 0.1 units from the previous year to an average of 0.7 subscriptions.

The average number of SVOD services subscribed to was 0.7 services for the market as a whole, an increase of 0.1 from the previous year. However, when focusing on SVOD users, there was no change from the previous year, with an average of 1.7 per person.

In consideration of the increase in SVOD usage, it is clear that although the total number of overall market users has expanded, multiple service subscriptions among users have not progressed. Furthermore, there were declines by age group, with those in their 20s and 50s decreasing by 0.1 service subscriptions from the previous year.

As mentioned above, the " Video on demand / Broadcast / Physical home video market user analysis report in Japan (Surveyed in November 2021)" provides a wide variety of data, including analysis across contract types and media type, actual usage by category, brand penetration by individual service, and in-depth analysis of usage by video on demand service. We hope you will find it useful in understanding and analyzing the home entertainment market as a whole.

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## **Report specification**

Product name: Video on demand / Broadcast / Physical home video market user analysis report in Japan (Surveyed in November 2021)

Survey method : Internet survey

Survey target :Male/female of ages between 15 and 69 who are living in Japan

The number of respondents : 19,784

Published Date: December 10, 2021

Survey date : Saturday, Saturday, November 6, 2021 - Wednesday, November 10, 2021

Language: English / Japanese

Deliverable Option: Report (PDF), Aggregate tools \*(optional extra: Tableau, Excel)

## **About GEM Partners inc.**

GEM Partners Inc. launched in 2008 in Japan. The company provides data x digital marketing services for the entertainment industry. 10+ years' experience in providing the most trusted and accurate predictive analysis of theatrical and home entertainment revenue, and digital media execution services with unmatched marketing insights and analytical expertise in the entertainment industry.

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