# Brand Loyalty Survey for Subscription Media Streaming Services

**B**lu-ray **I**nte**R**net **D**VD **S**urvey  For the home entertainment industry.

To understand the impact of service policies regarding subscription media streaming services, including strengthening promotions and program lineups, by conducting a monthly survey on the status of brand penetration, loyalty, brand image, and subscription and cancellation in such services.

To obtain suggestions about factors for enhancement and promotion that effectively lead to the acquisition of new users, by analyzing the impact of brand image on intention to start using a new service.
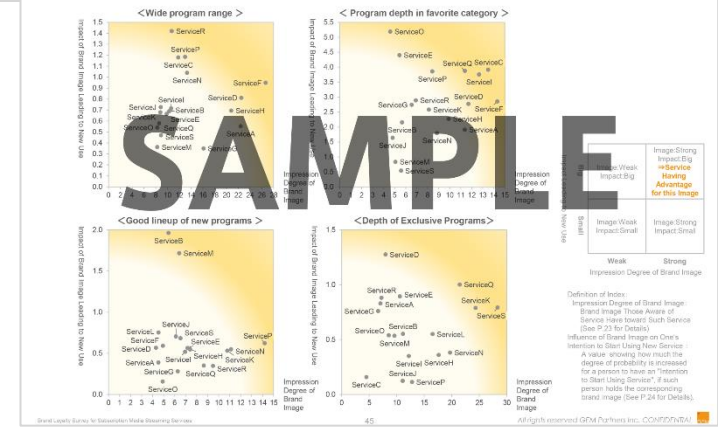
Understanding the growth of The SVOD market and the positioning of their services

# Brand Loyalty Survey for Subscription Media Streaming Services

**GEM**

## Purposes of This Survey

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◆ To obtain suggestions about factors for enhancement and promotion that effectively lead to the acquisition of new users, by analyzing the impact of brand image on intention to start using a new service.



Sample Chart - Brand Penetration (Awareness/usage, Media exposure and estimated no. of members)
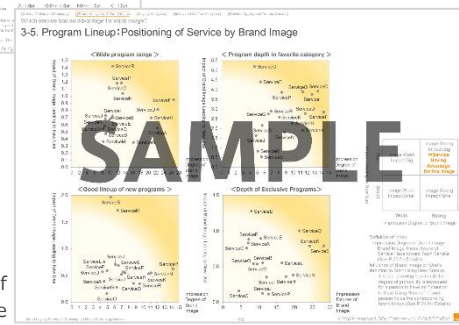


Sample Chart - Positioning of Brand Image by Service

## Key Benefits of Buying the Report

**Status of Brand Penetration**

Awareness/usage,
Media exposure
Estimated no. of members

**Potential for Acquiring New Users**

Reasons for Intention to Start /Not Start Using New Service

**Inflow and Outflow Analyses**

Status & Reasons of Subscription/ Cancellation within 3 Months

## The survey covered 17 services

- ABEMA Premium
- Amazon Prime Video
- Anime Hodai
- Apple TV+
- d Anime Store
- DAZN

- Disney+
- dTV
- FOD (FOD Premium)
- Hikari TV Video Service
- Hulu
- J:COM On Demand

- Netflix
- Paravi
- Rakuten TV
- TELASA
- U-NEXT

( Alphabetical Order )

## Price

**Annual subscription for Jan-Dec 2022 issue**

1. **Japanese Ver.** (PDF)
   **+ Aggregate Calculation by Segment** (Excel)
   **¥2,640,000**

2. **Japanese Ver.** (PDF) **+ English Ver.** (PDF)
   **+ Aggregate Calculation by Segment** (Excel)
   **¥3,036,000**

※ All prices are tax included.
※ Subscriptions can be started during the term.
   Please contact us for details..

# Definition of Index



All Respondents

(Have Never Heard of Name of Service)

Awareness of Name of Service
(Have Heard of Name of Service)

(Know Name of Service, but don't know that Such Service Offers SVOD )

Awareness of Contents of Service
(Know that Such Service Offers SVOD)

(Know Contents of Service, but Don't Use It)

(Intending Not to Start Using Service/Intending to Stop Using Service)

Intention to Start Using New Service
(Intending to Start Using Service)

Trial Use
(Utilization with Free Account)

(Intending Not to Start Using Service/Intending to Stop Using Service)

Intention to Continue to Use Service
(Intending to Start Using Service)

Use
(Utilization with Paid Account)

(Intending Not to Start Using Service/Intending to Stop Using Service)

Intention to Continue to Use Service
(Intending to Start Using Service)

# Sample Image

Degree of penetration, whether members obtained or not, degree of media exposure during the period

## 1-1. Awareness/usage, Media exposure and estimated no. of members

(Subject for Aggregate Calculation: All Respondents, n = 9,877)
Listed in Descending Order of Utilization

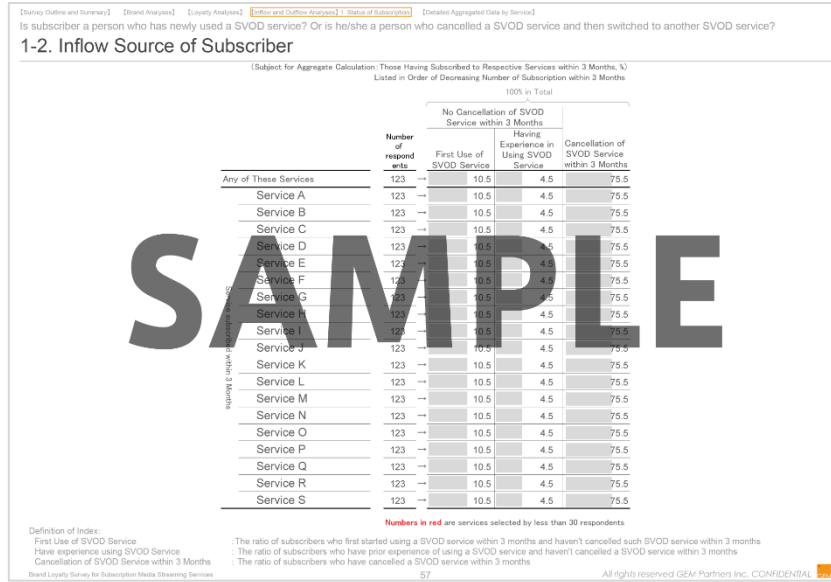| | Assumed Number of Subscribers (Million) ※ | Awareness/usage — Awareness of Name of Service — Value as of This Month (%) | Difference from Previous Month (pt) | Awareness of Contents of Service — Value as of This Month (%) | Difference from Previous Month (pt) | Trial Use — Value as of This Month (%) | Difference from Previous Month (pt) | Use — Value as of This Month (%) | Difference from Previous Month (pt) | Media Exposure — TV Exposure(GRP) — TVCM Exposure | TV Program Exposure | Digital※2 — Number of Tweets | Number of Online News | Number of Blog Posts |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Amazon Prime Video | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Netflix | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Hulu | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| DAZN | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Abema Video(Premium Plan) | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| J:COM On Demand | 99.9 | | | 99.9 | | | -9.9 | | | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| dTV | | | | 99.9 | +9.9 | | -9.9 | | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| U-NEXT | | | | 99.9 | +9.9 | | | | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| d Anime Store | ＊＊＊ | | | 99.9 | +9.9 | | | | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Disney DELUXE | ＊＊＊ | | | 99.9 | | | | | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Hikari TV Video Service | ＊＊＊ | | | 99.9 | | | | | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Paravi | ＊＊＊ | 99.9 | +9.9 | 99.9 | | | | | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Rakuten TV | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| TSUTAYA TV | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| TELASA | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| FOD(FOD Premium) | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Anime Hodai | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Apple TV+ | ＊＊＊ | 99.9 | +9.9 | 99.9 | +9.9 | 99.9 | -9.9 | 99.9 | -9.9 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |

FYR)
Awareness of SVOD Service (Know Such Kind of Service): 89.7%(+2.6pt)
Use of Any SVOD Service (Either Paid Service Usage or Trial Use): 27.9%(+2.9pt)

Definition of Index:
Awareness of Name of Service : Ratio of respondents having heard of the name of such service
Awareness of Content of Service : Ratio of respondents who know that such service offers SVOD
Trial Use : Ratio of Those Using Such Service with Free Account
Use : Ratio of Those Using Such Service with Paid Account

Explanatory Notes on Difference from Previous Month

| | | | |
|---|---|---|---|
| Awareness of Name of Service | ≧+5.0pt | +0.0~+5.0pt -0.0~-5.0pt | <-5.0pt |
| Awareness of Contents of Service | ≧+1.0pt | +0.0~+1.0pt -0.0~-1.0pt | <-1.0pt |
| | ≧+0.5pt | +0.0~+0.5pt -0.0~-0.5pt | <-0.5pt |

※1 Method for Calculating Estimated Number of Subscribers : Regarding the services that had made public the respective number of their subscribers, "the number of subscribers per 1 percent of those using a paid service" was calculated based on the correlation between the paid service usage and the number of subscribers, and then that calculated number was multiplied by the ratio of subscribers using a paid service as of the time of this survey in order to obtain the estimated number of subscribers. As for dTV, d Anime Store, Anime Hodai and TALASA, their respectively estimated number of subscribers were calculated based on "the number of subscribers per 1 percent of those using the paid service" of dTV , those for other services were calculated using "the number of subscribers per 1 percent of those using the paid service" of Hulu.
※2 Since the trends for number of Tweets, online news, and blog posts differ greatly according to how well known the service name is, it's be careful with service comparisons. The trend within each service is more important (refer to p. 62 and after).

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Is subscriber a person who has newly used a SVOD service? Or is he/she a person who cancelled a SVOD service and then switched to another SVOD service?

## 1-2. Inflow Source of Subscriber

(Subject for Aggregate Calculation: Those Having Subscribed to Respective Services within 3 Months, %)
Listed in Order of Decreasing Number of Subscription within 3 Months
100% in Total

| | Number of respondents | | No Cancellation of SVOD Service within 3 Months — First Use of SVOD Service | Having Experience in Using SVOD Service | Cancellation of SVOD Service within 3 Months |
|---|---|---|---|---|---|
| Any of These Services | 123 | → | 10.5 | 4.5 | 75.5 |
| Service A | 123 | → | 10.5 | 4.5 | 75.5 |
| Service B | 123 | → | 10.5 | 4.5 | 75.5 |
| Service C | 123 | → | 10.5 | 4.5 | 75.5 |
| Service D | 123 | → | 10.5 | 4.5 | 75.5 |
| Service E | 123 | → | 10.5 | 4.5 | 75.5 |
| Service F | 123 | → | 10.5 | 4.5 | 75.5 |
| Service G | 123 | → | 10.5 | 4.5 | 75.5 |
| Service H | 123 | → | 10.5 | 4.5 | 75.5 |
| Service I | 123 | → | 10.5 | 4.5 | 75.5 |
| Service J | 123 | → | 10.5 | 4.5 | 75.5 |
| Service K | 123 | → | 10.5 | 4.5 | 75.5 |
| Service L | 123 | → | 10.5 | 4.5 | 75.5 |
| Service M | 123 | → | 10.5 | 4.5 | 75.5 |
| Service N | 123 | → | 10.5 | 4.5 | 75.5 |
| Service O | 123 | → | 10.5 | 4.5 | 75.5 |
| Service P | 123 | → | 10.5 | 4.5 | 75.5 |
| Service Q | 123 | → | 10.5 | 4.5 | 75.5 |
| Service R | 123 | → | 10.5 | 4.5 | 75.5 |
| Service S | 123 | → | 10.5 | 4.5 | 75.5 |

Numbers in red are services selected by less than 30 respondents

Definition of Index:
First Use of SVOD Service : The ratio of subscribers who first started using a SVOD service within 3 months and haven't cancelled such SVOD service within 3 months
Have experience using SVOD Service : The ratio of subscribers who have prior experience of using a SVOD service and haven't cancelled a SVOD service within 3 months
Cancellation of SVOD Service within 3 Months : The ratio of subscribers who have cancelled a SVOD service within 3 months

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What factors have caused people to intend to start using a service?

## 2-3. Reasons for Intention to Start Using New Service

(Subject for Aggregate Calculation : Those Who Intend to Start Using Respective Services※, %)
Listed in Descending Order of Utilization

Numbers in red are services selected by less than 30 respondents

■ Items with a high value

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Which service has an advantage for each image?

## 3-5. Program Lineup：Positioning of Service by Brand Image

< Wide program range >
< Program depth in favorite category >
< Good lineup of new programs >
< Depth of Exclusive Programs >

Definition of Index:
Impression Degree of Brand Image : Brand Image Those Aware of Service Have toward Such Service (See P.23 for Details)
Influence of Brand Image on One's Intention to Start Using New Service : A value showing how much the degree of probability is increased for a person to have an "Intention to Start Using Service", if such person holds the corresponding brand image (See P.24 for Details)

Understanding the growth of The SVOD market and the positioning of their services
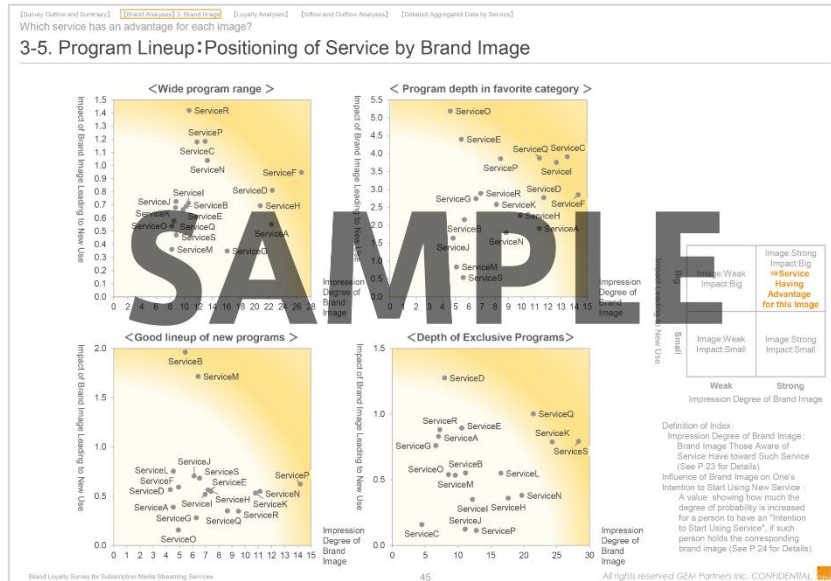
# Brand Loyalty Survey for Subscription Media Streaming Services

## Table of Contents

# Outline

| Brand Loyalty Survey for Subscription Media Streaming Services | |
| --- | --- |
| **Survey Method** | Online Questionnaire sent by e-mail |
| **Survey Target** | Males and Females living in Japan from ages 15 to 69 |
| **Implementation Date** | The end of every month |
| **Number of Respondents** | A little under 10,000 /month |
| **Published Date** | 12 issues/ year (publishing 15th of every month)<br>*In the case of Saturdays, Sundays and public holidays, it would be the following business day |
| **Services Subject to This Survey** | ABEMA Premium / Amazon Prime Video / Anime Hodai / Apple TV+ / d Anime Store / DAZN / Disney+ / dTV / FOD (FOD Premium) / Hikari TV Video Service / Hulu / J:COM On Demand / Netflix / Paravi / Rakuten TV / TELASA / U-NEXT |
| **Deliverable Option** | 1. Japanese Ver. (PDF) & Aggregate Calculation by Segment (Excel)<br>2. Japanese Ver. (PDF) & English Ver. (PDF) & Aggregate Calculation by Segment (Excel) |
| **Provided files** | PDF (Report) , Excel (Aggregate Calculation by Segment) |

# GEM Standard

Product and service overview

# Product and service

## Tracking Report

Providing industry indexes and demand forecasts.

**For production companies, exhibitors, distributors**
**and marketing companies in the movie theater industry.**

### CATS

**C**inema **A**nalytical **T**racking **S**urvey

**For the home entertainment industry.**

### BIRDS

**B**lu-ray **I**nte**R**net **D**VD **S**urvey

## Custom Marketing Research

Providing insights from quantitative and qualitative research to guide marketing strategy that maximizes the value of entertainment brands.

**For all brand marketers in the entertainment industry.**

### DOGS

**D**emand & **O**pportunity **G**enerating **S**urvey

## Digital Marketing

Planning, executing and analyzing digital marketing for entertainment brands based on proprietary data and insights.

**For all brand marketers in the entertainment industry.**

### PANDA

**P**rogrammatic advertising **AND** **A**nalytics

# For inquiries, please contact

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