

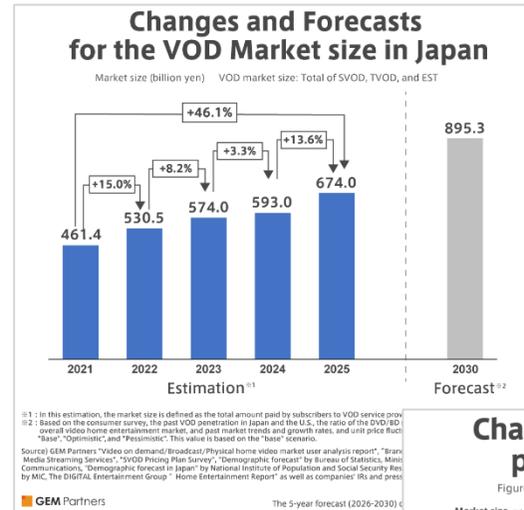
Platform & Contents

# The 5-year forecast (2026-2030) of Video On Demand market

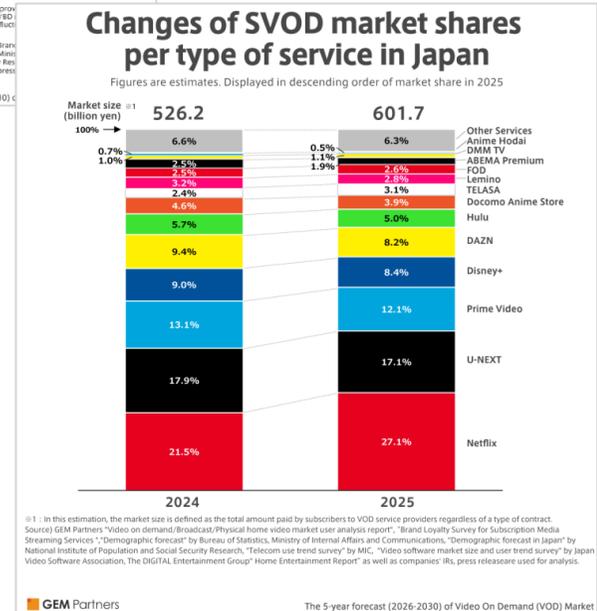
Market forecast per SVOD/TVOD/EST

The report estimates the market size and share of video on demand (VOD) in 2025 by SVOD/TVOD/EST. The report also provides the market size forecast by 2030 under the three scenarios of "Base," "Optimistic," and "Pessimistic" for each SVOD/TVOD/EST as well as the overall market.

Furthermore, the report provides a detailed description of the estimation logic used in the report, allowing you to confirm the estimation method.



<sup>#1</sup> : In this estimation, the market size is defined as the total amount paid by subscribers to VOD service providers.  
<sup>#2</sup> : Based on the consumer survey, the past VOD penetration in Japan and the U.S., the ratio of the DVD/BD overall video home entertainment market, and past market trends and growth rates, and unit price fluctuation scenarios: "Base," "Optimistic," and "Pessimistic." This value is based on the "Base" scenario.  
 Source: GEM Partners "Video on demand/Broadcast/Physical home video market user analysis report", "Brand Media Streaming Services", "SVOD Pricing Plan Survey", "Demographic forecast" by Bureau of Statistics, Mass Communications, "Demographic forecast in Japan" by National Institute of Population and Social Security Research, MIC, The DIGITAL Entertainment Group "Home Entertainment Report" as well as companies' IRs and press releases.



<sup>#1</sup> : In this estimation, the market size is defined as the total amount paid by subscribers to VOD service providers regardless of a type of contract.  
 Source: GEM Partners "Video on demand/Broadcast/Physical home video market user analysis report", "Brand Loyalty Survey for Subscription Media Streaming Services", "Demographic forecast" by Bureau of Statistics, Ministry of Internal Affairs and Communications, "Demographic forecast in Japan" by National Institute of Population and Social Security Research, "Telecom use trend survey" by MIC, "Video software market size and user trend survey" by Japan Video Software Association, The DIGITAL Entertainment Group "Home Entertainment Report" as well as companies' IRs, press release used for analysis.

# The 5-year forecast (2026-2030) of Video On Demand (VOD) market

The report estimates the market size/share of video on demand (VOD) in 2025 by SVOD/TVOD/EST. It also provides the market size forecast by 2030 under the three scenarios of "Base," "Optimistic," and "Pessimistic" for each SVOD/TVOD/EST as well as the overall market. Furthermore, It provides a detailed description of the estimation logic used in the report, allowing you to confirm the estimation method.

## Estimated market size/share by contract type (SVOD/TVOD/EST).

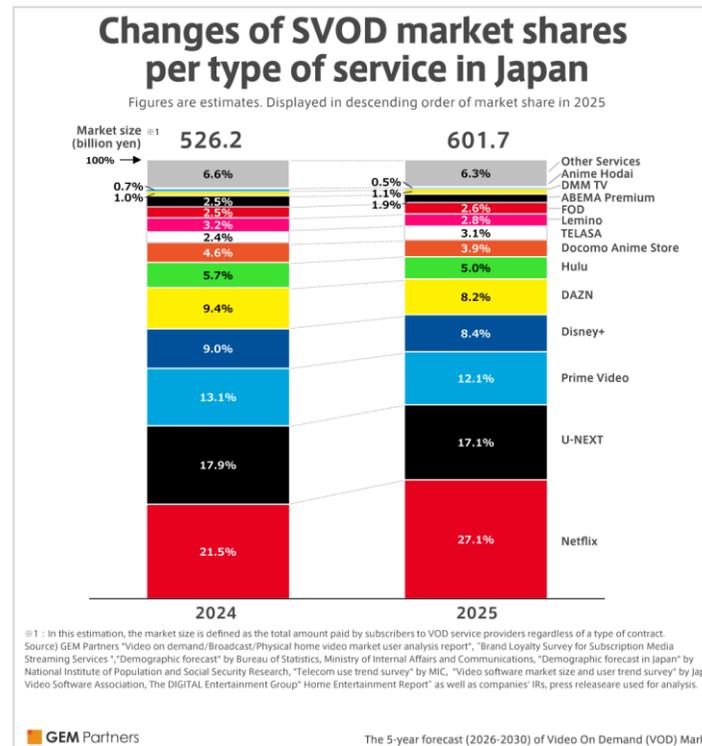
Using our own consumer research, we have estimated market share/size in 2025 by SVOD (subscription video on demand), TVOD (transactional video on demand) and EST (Electric Sell Through).

## Base, Optimistic and Pessimistic scenario design

Based on the track record of video on demand in Japan and the U.S. to date, we have set three scenarios (Base, Optimistic and Pessimistic) and forecasted the market size until 20230.

## Sharing of estimation logic and results

In addition to our own consumer research, we have used public statistics and published figures from video on demand service providers to create our estimates for this report. In the report, the estimation logic is also described in detail.

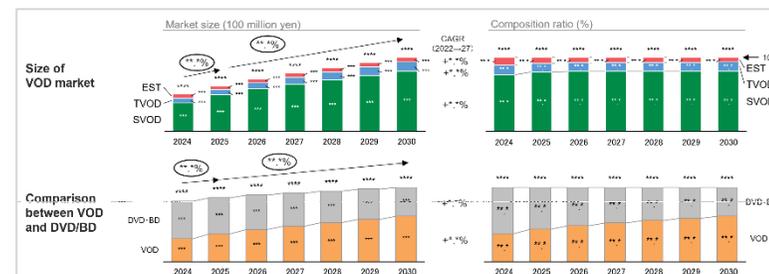


**Price**

**Japanese Ver. (PDF+Excel) : ¥330,000**

**Japanese Ver. (PDF+Excel) +English Ver. (PDF+Excel) : ¥550,000**

\*All prices are tax included.



# Contents

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## Overview

### 1: Estimation results

- 1) Estimation results for overall VOD market
- 2) Comparison of VOD market with DVD/BD market
- 3) Shares per type of service

### 2: Estimation logic

#### Overall picture of estimation logic

#### Step1 Estimation of market size in 2025

- Parameter values used in 2025 estimation

#### Step2 Estimation of market size in and after 2026

- Correlation between the number of users and its growth rate
- Changes of parameters used in estimation (Base scenario)
- [A1] Changes of internet population and shares per gender/generation
- [A2] (Total) Changes of utilization rate
- [A] (Total) Changes of the number of users

## 3: Reference

### 1) Market size and composition of each scenario

### 2) Estimation of shares per content type/content holder in 2025

- Shares per content type in 2025 (estimation)
- Shares per content holder of movies in 2025 (estimation)

### 3) Changes of market size/shares per type of service

- SVOD
- TVOD
- EST

### 4) Results of Annual spending per SVOD user

### 5) (Reference) Trends in the U.S. video streaming market

### 6) Video content viewing patterns and trends by content genre (2025)

\*Additional survey in 2026

※ Definition of a term

VOD : **V**ideo **o**n **D**emand

SVOD: **S**ubscription **V**OD

TVOD: **T**ransactional **V**OD

EST: **E**lectronic **S**ell **T**hrough

# Survey overview

## The 5-year forecast (2026-2030) of Video On Demand (VOD) market

<b>Survey method</b>	GEM Partners "Video on demand/Broadcast/Physical home video market user analysis report", "Brand Loyalty Survey for Subscription Media Streaming Services ", "Demographic forecast" by Bureau of Statistics, Ministry of Internal Affairs and Communications, "Demographic forecast in Japan" by National Institute of Population and Social Security Research, "Telecom use trend survey" by MIC, "Video software market size and user trend survey" by Japan Video Software Association, The DIGITAL Entertainment Group "Home Entertainment Report" as well as companies' IRs, press release are used for analysis.
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