



## ampd report: Tver, Amazon Prime Video and Netflix lead premium VOD category in Japan while U-Next establishes itself as the clear local leader in SVOD

### Key Highlights

- Japan's premium VOD category generated >100 bil. minutes and US\$4.5 bil. in subscription revenue in 2023
- 5 platforms – Amazon Prime Video, Netflix, U-Next, Disney+ and Hulu Japan – shaped Japan's SVOD economy in 2023, generating a cumulative US\$3.3 bil. in subscription revenue with an aggregate 38.0 mil. subscriptions at year-end
- Japanese anime, live-action dramas and variety content powered 65% of premium VOD viewership and accounted for over 50% of SVOD customer acquisition in 2023

(Singapore, Feb 5, 2024) A new report from ampd, a leading data analytics company owned by Media Partners Asia (MPA) to measure engagement and monetization across the digital economy, indicates that Japan's premium VOD category generated over 100 bil. minutes in viewership and US\$4.5 bil. in subscription revenue in CY 2023. The *Japan Online Video Consumer Insights & Analytics report* uses a permission-based passive panel measuring digital activity from over 19,000 members in partnership with the Intage Group.

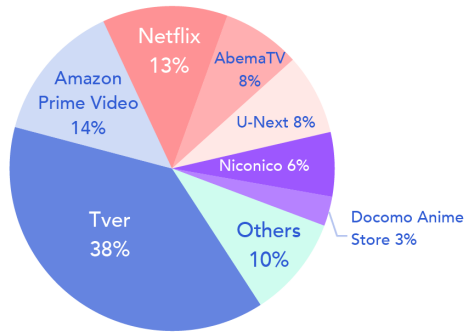
The report highlights Japan's large and competitive VOD ecosystem where local broadcaster-led AVOD platform Tver commanded over 20.2 mil. MAUs and captured 38% of premium VOD viewership in 2023. Amazon Prime Video led the SVOD category with 19.7 mil. MAUs, followed by U-Next (8.2 mil.) and Netflix (7.5 mil.). Tver and Netflix led engagement with an average of 8.8 and 7.3 hours per user each quarter, respectively.

Five platforms – Amazon Prime Video, Netflix, U-Next, Disney+ and Hulu Japan – shaped Japan's SVOD economy in 2023, generating a cumulative US\$3.3 bil. in subscription revenue with an aggregate 38.0 mil. subscriptions at year-end. Prime Video and Netflix led monetization in 2023 with 23% and 21% of total subscription revenue, respectively. Meanwhile, U-Next was the fastest growing player in SVOD in 2023 with a 30% share of net new subscriber additions. U-Next has emerged as the leading local SVOD player with high ARPU, benefiting from its acquisition of Paravi and a robust anime, local TV and sports offering.

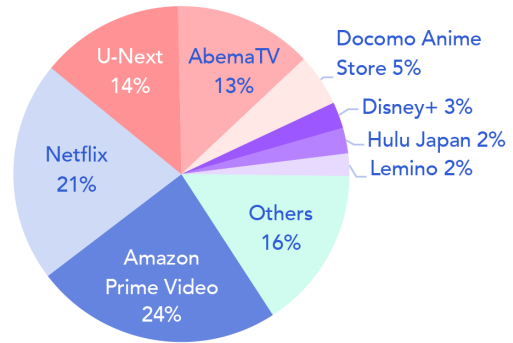
Commenting on Japan's premium VOD economy, ampd lead analyst Dhivya T said:

"Japanese anime, live-action dramas and variety content represented 65% of viewership in the premium VOD category and contributed over 50% of customer acquisition in the SVOD category in 2023. Licensed local dramas are important engagement drivers for Tver, U-Next and Hulu Japan, where TV hits have a second-life, while original dramas and variety have had clear acquisition impact on Netflix (Love Village, First Love) and Amazon Prime Video (The Bachelor). In addition, anime remains a core pillar of SVOD viewership, with all major SVOD services offering large, non-exclusive and current anime libraries. Exclusive anime such as One Piece Film: Red (Amazon) demonstrated notable customer acquisition impact."

### Share of Premium VOD Viewership (2023)



### Share of SVOD-only Viewership (2023)



Source: ampd

### About ampd

Our mission is to authentically understand digital-age customers through innovative technology and unparalleled expertise. We unearth genuine behavioural data and insights, empowering businesses for meaningful connections, customer-centric strategies, and sustainable success. Across the 12 markets in which we operate, ampd leverages more than 60,000 passively measured panel members with two SaaS based products – ampd Vision and ampd Pulse – while providing customized research to our clients across a variety of sectors including Streaming VOD, Content, Advertising, Telecoms and more.

Our clients include leading global internet and technology brands, Hollywood and Asian content studios, advertising agencies, telcos and pay-TV operators. ampd won the Best International Video Media Research Award at the 2023 UK Mediatel Media Research Awards, which recognizes organizations driving innovation in research.

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