

May 24, 2022

MPA REPORT: AMAZON PRIME VIDEO & NETFLIX LED SVOD GROWTH IN Q1 2022 AS TOTAL SUBS IN JAPAN REACHED 48.4M; LOCAL CONTENT DRIVES CUSTOMER ACQUISITION WITH 66% OF FIRST-TITLE DEMAND

Key Highlights

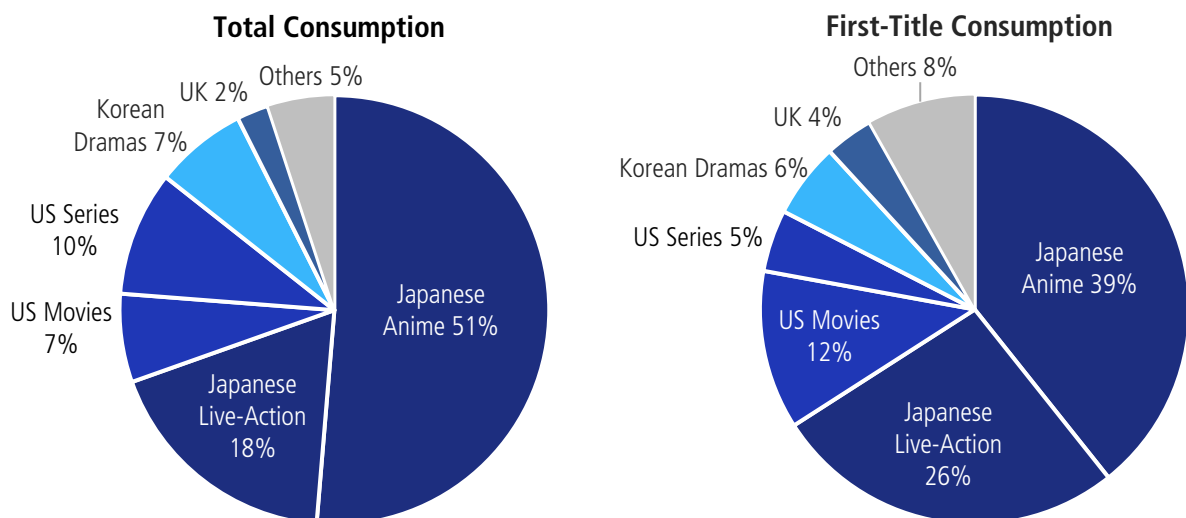
- Japan reached 48.4 mil. SVOD subscriptions in Q1 2022. Netflix and Amazon Prime Video led SVOD growth, ending the quarter with a combined 48% share of Japan’s SVOD base. The two also accounted for 35% of measured premium video consumption.
- Amazon maintains a significant lead with 16.5 mil. subs and 23% of premium video consumption.
- Anime is a defining attribute of premium video streaming in Japan, exceeding 50% of measured premium video consumption in Q1 2022. Local content – both anime and live-action dramas – played a critical role in bringing new subscribers to Amazon Prime Video, Netflix, Hulu Japan and U-Next.

(SINGAPORE, May 24, 2022) Amazon Prime Video and Netflix exited Q1 2022 with a robust growth quarter to have a combined 48% of total SVOD customers and 35% of total premium video consumption, according to Media Partners Asia’s quarterly report, *Japan Online Video Consumer Insights & Analytics*. The report leverages MPA’s proprietary AMPD Research Platform to measure and analyse streaming media consumption across key VOD services.

The report indicates that the SVOD paying subscribers reached 48.4 mil. in Q1 2022, with Amazon Prime Video (34%), Netflix (14%) and Hulu Japan (6%) in the lead. Abema TV, TVer and U-Next remain significant in the AVOD, freemium and SVOD categories while Disney+ is steadily growing its reach in the market. Commenting on the report’s findings, MPA Executive Director Vivek Couto said:

“The premium video segment in Japan remains competitive. While Amazon retains a significant lead in the market, we saw material growth in subs and consumption share from Netflix in Q1, driven by the release of new live action originals and a strong K-drama slate. Acquired and largely non-exclusive anime remains a massive driver of online video demand across platforms, exceeding 50% of total measured demand, with titles from 10 animation studios capturing 45% of anime demand. Live action dramas are particularly important for platforms like Hulu Japan which leverages content from parent Nippon TV and others.”

SHARE OF PREMIUM ONLINE VIDEO CONSUMPTION (Q1 2022)



Note: (1) Measured platforms include Amazon Prime Video, Disney+, Hulu Japan, Netflix and U-Next.

(2) First-title consumption refers to new paying customer demand, aggregated across measured platforms.

Source: AMPD Research

About This Report & Methodology

This report, entitled *Japan Online Video Consumer Insights & Analytics* leverages MPA's proprietary AMPD Research Platform to evaluate consumer behavior and usage patterns across VOD media services in Japan. The report includes analysis and profiles of 17 unique OTT video platforms focusing on paying subscribers, monthly active users, streaming minutes, average daily time spent, viewer profiles and demographics. Title-level content analysis is provided for five major platforms – Amazon Prime Video, Disney+, Hulu Japan, Netflix and U-Next.

The AMPD platform uses a permission-based panel of consumers who consent to the collection of their session-based activity. For this report, the platform passively measured real consumption on all android and IOS devices in Japan in Q1 2022 with a sample size of 23,440 sourced from our in-market research partner Intage Group (ITG), Japan's largest market research institute. The data reported is anonymized and conforms to data privacy legislation in Japan. AMPD Vision was used by MPA to provide a granular view of streaming content consumption across key VOD services. Consumption estimates are based on MPA's proprietary weighting and projection techniques to be nationally representative of mobile consumption for individuals aged 15 to 69.

About Media Partners Asia (MPA)

Media Partners Asia (MPA) is the leading independent provider of research, advisory and consulting services across media, telecoms, sports and entertainment industries in the Asia Pacific and the Middle East. We provide customized research with strategic recommendations to help clients launch new products & services, enter new markets, as well as acquire and sell businesses. MPA reports are used and sourced by local, regional and global companies for strategic planning and equity & debt transactions. We also offer dedicated primary research through subsidiary AMPD Research to measure consumer behavior across the digital economy, including online video, connectivity, advertising and gaming. MPA also hosts the APOS Summit, the defining voice for the Asia Pacific media, telecoms, sports and entertainment industry.

For more details, visit www.media-partners-asia.com

About AMPD Research (AMPD)

Founded by Media Partners Asia (MPA) in 2019, AMPD captures real consumer data to provide deep insights across the digital ecosystem with a focus on the fast-growing global streaming economy. AMPD has a footprint across 12 global markets. Critically, working with Reality Mine technology, AMPD is the only global platform with available title-level reporting for streaming platforms capturing all consumption. AMPD uses passive measurement and proprietary software to measure consumer behavior and generate reliable app / platform metrics across mobile android, iOS and PCs platforms. AMPD reports and custom-made research projects include the analysis of more than 100 online video platforms and cover several use cases across Advertising, Content, Connectivity, Commerce, Gaming, Music & Video sectors.

Contact

Lavina Bhojwani

VP & GM

Media Partners Asia

E: lavina@media-partners-asia.com

###