

MPA REPORT: DISNEY+ LEADS JAPAN SVOD GROWTH AS TOTAL SUBS TOP 49.4M; LOCAL CONTENT LEADS FIRST-TITLE DEMAND, WITH K-CONTENT GAINING SUBSCRIBER ACQUISITION IMPACT ON NETFLIX & DISNEY+

Key Highlights

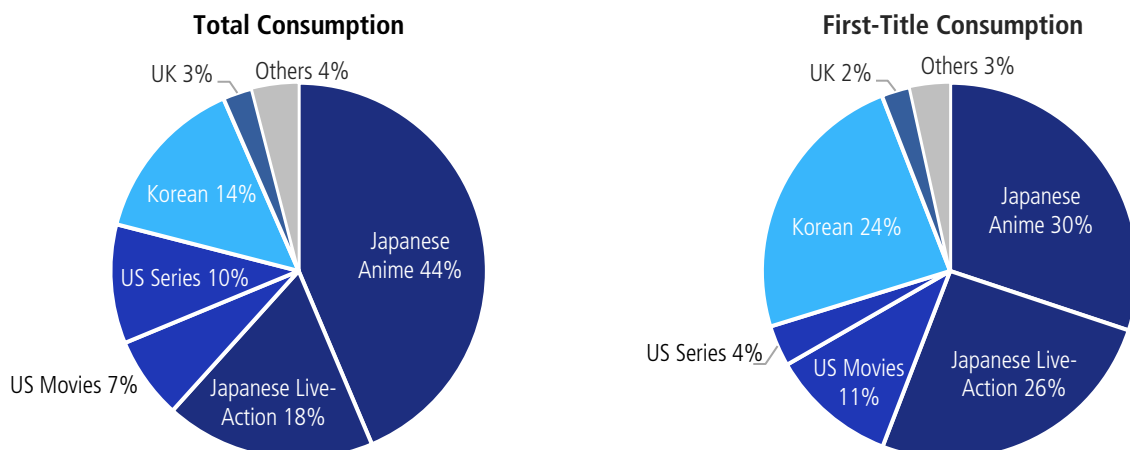
- Japan added 1.1 mil. net new SVOD subscriptions over Q2-Q3 2022. Disney+ led SVOD growth, closing Q3 with 3.6M total subscribers, while Amazon Prime Video maintained SVOD leadership with 16.5M subs, followed by Netflix at 7.0M.
- Local broadcast TV consortium TVer leads premium video viewership with 26% share in Q3 with Amazon Prime Video in second place with 19%.
- Anime is a defining attribute of premium video streaming in Japan, accounting for 44% of premium video consumption in Q3 2022. Korean content has significant subscriber acquisition impact on Netflix and Disney+, driving an outsize 26% of new user consumption, while licensed live-action content is particularly important on Hulu Japan and U-Next.

(SINGAPORE, Nov 8, 2022) Disney+ led Japan's SVOD growth, while Tver and Amazon Prime Video powered premium video consumption in Q3 2022, 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 total SVOD subscriptions in Japan topped 49.4 mil. in Q3 2022 led by Amazon Prime Video with 16.5 mil. subs, followed by Netflix at 7.0 mil. Disney+ replaced Hulu Japan at the #3 spot with 3.6 mil. subscribers. Boosted by marketing and promotional discounts, Disney+'s kids, Korean, and tentpole franchises drove subscriber acquisition. Other key local SVOD platforms include Hulu Japan, U-Next, and Abema TV, while TVer leads local AVOD. Commenting on the findings, MPA Executive Director Vivek Couto said:

“Ex-Disney+, SVOD growth in Japan was relatively flat over Q2 and Q3. Amazon Prime Video continues to lead the category, followed by Netflix, both leveraging large, non-exclusive anime libraries to drive consumption. Local TV consortium and AVOD platform TVer continues to grow its share of premium video consumption, meeting demand for TV livestreams and catch-up of popular variety and drama programming. Licensed TV content also drives subscriber acquisition on Hulu Japan and U-Next. Notably, Korean dramas play an outsize role in subscriber acquisition for Netflix and Disney+, providing competitive differentiation amidst largely non-exclusive anime libraries. Disney+ has also started to build an exclusive anime library, underscoring strategies towards content differentiation in a maturing SVOD environment.”

SHARE OF PREMIUM ONLINE VIDEO CONSUMPTION (Q3 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 Q3 2022 with a sample size of 23,500 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 13 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.

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