

 REPORT

# Mobile app trends 2025: Japan edition

App performance benchmarks  
and insights

 ADJUST

With insights from:  Sensor Tower



# Contents

**Introduction.....3**

- Steady shifts & smart growth define Japan’s 2025 app market.....3
- Japan’s ATT rates increase across most app categories.....5
- An overview of the Japanese app market ..... 6
- Methodology .....7
- Key takeaways ..... 8

**Part 1: Gaming ..... 11**

- Install and session trends.....14
- Finding and keeping users .....19

**Part 2: Finance ..... 21**

- Install and session trends.....24
- Finding and keeping users .....29

**Part 3: Entertainment ..... 31**

- The rise of short drama and OTT apps in Japan.....32
  - Short drama apps: snackable stories, serious revenue.....33
  - OTT platforms: localization, bundling, and CTV crossover....34
- Install and session trends..... 37
- Finding and keeping users ..... 40

**Part 4: Comics ..... 42**

- Install and session trends.....44
- Finding and keeping users ..... 47

## INTRODUCTION

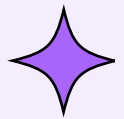
# Steady shifts and smart growth define Japan's app market in 2025

Japan remains one of the world's most valuable app markets in 2025, where user behavior, technology adoption, and monetization strategies continue to evolve in sync. The ecosystem is maturing steadily, supported by near-universal smartphone use, 194 million mobile connections ([157% of the population](#)), and increasing time spent in-app across both gaming and non-gaming verticals. In 2024, Japan retained its position as the [third-largest market for consumer app spend](#), reaching \$16.5 billion.

While gaming remains a cornerstone of the market, momentum is shifting. In addition to the enormous mobile games market, growth is increasingly driven by finance, entertainment, and comics—reflecting evolving user interests and structural changes in how apps are discovered, used, and monetized. Short drama apps are gaining traction with mobile-native storytelling, while OTT platforms are expanding rapidly, powered by Japan's 5G infrastructure and a growing appetite for high-quality, on-demand content. Generative AI is transforming the ecosystem further, accelerating content creation, powering personalization, and enabling deeper user engagement.

As the market advances, privacy frameworks are evolving in parallel. Marketers are moving beyond traditional analytics toward hybrid, privacy-conscious strategies. Next-gen solutions like predictive analytics, incrementality testing, and marketing mix modeling are becoming essential tools to drive performance across fragmented user journeys.










This report breaks down app performance and user trends across four key app verticals—gaming, finance, entertainment, and comics—with actionable insights for scaling in one of the world's most advanced mobile economies.



↓ Top 10 apps by downloads in Q1 2025 (Japan)

1	 <b>TikTok</b> Entertainment	
2	 <b>Pokémon TCG Pocket</b> Games	
3	 <b>ChatGPT</b> Utilities	
4	 <b>Mynaportal</b> Utilities	
5	 <b>Rakuten Pay</b> 楽天ペイ-楽天ポイントカードも利用できるスマホ決済アプリ Finance	
6	 <b>ENEOS公式アプリ - 給油も給油以外もいろいろおトクです</b> Lifestyle	
7	 <b>Chikawa Pocket</b> ちいかわぽけっと Games	
8	 <b>Temu: 億万長者気分でお買い物</b> Shopping	
9	 <b>Threads</b> Social Networking	
10	 <b>TVer(ティーバー)</b> 民放公式テレビ配信サービス Entertainment	

\$ Top 10 apps by consumer spend in Q1 2025 (Japan)

 <b>piccoma ピッコマ</b> Publications	
 <b>Pokémon TCG Pocket</b> Games	
 <b>LINE マンガ</b> Communication	
 <b>Monster Strike</b> モンスターストライク Games	
 <b>Last War:Survival Game</b> Games	
 <b>Umamusume: Pretty Derby</b> Games	
 <b>TikTok</b> Entertainment	
 <b>YouTube</b> Entertainment	
 <b>Fate/Grand Order</b> Games	
 <b>ドラゴンクエストウォーク</b> 歩く楽しみが増える位置情報ゲーム Games	

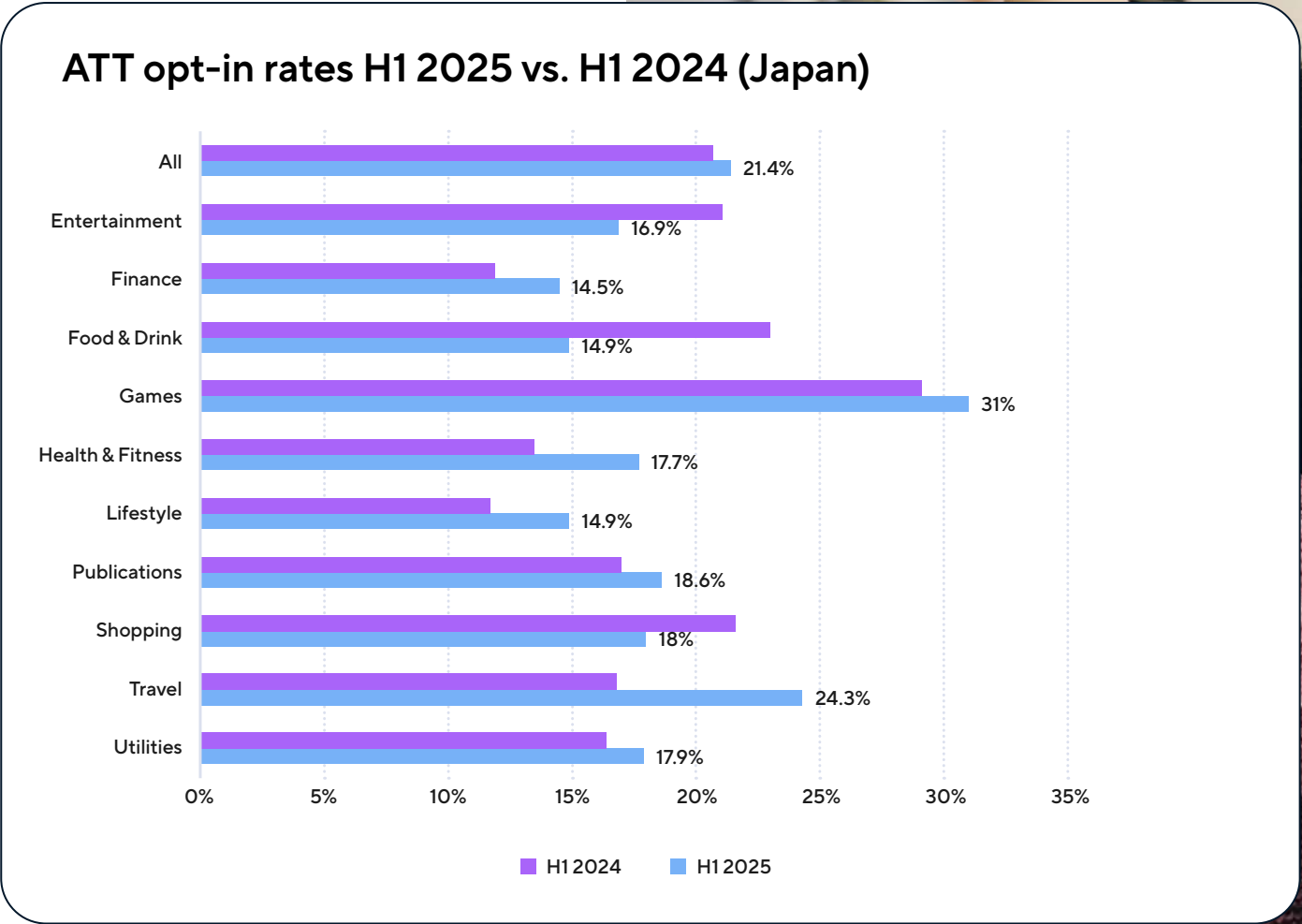
Source:  SensorTower



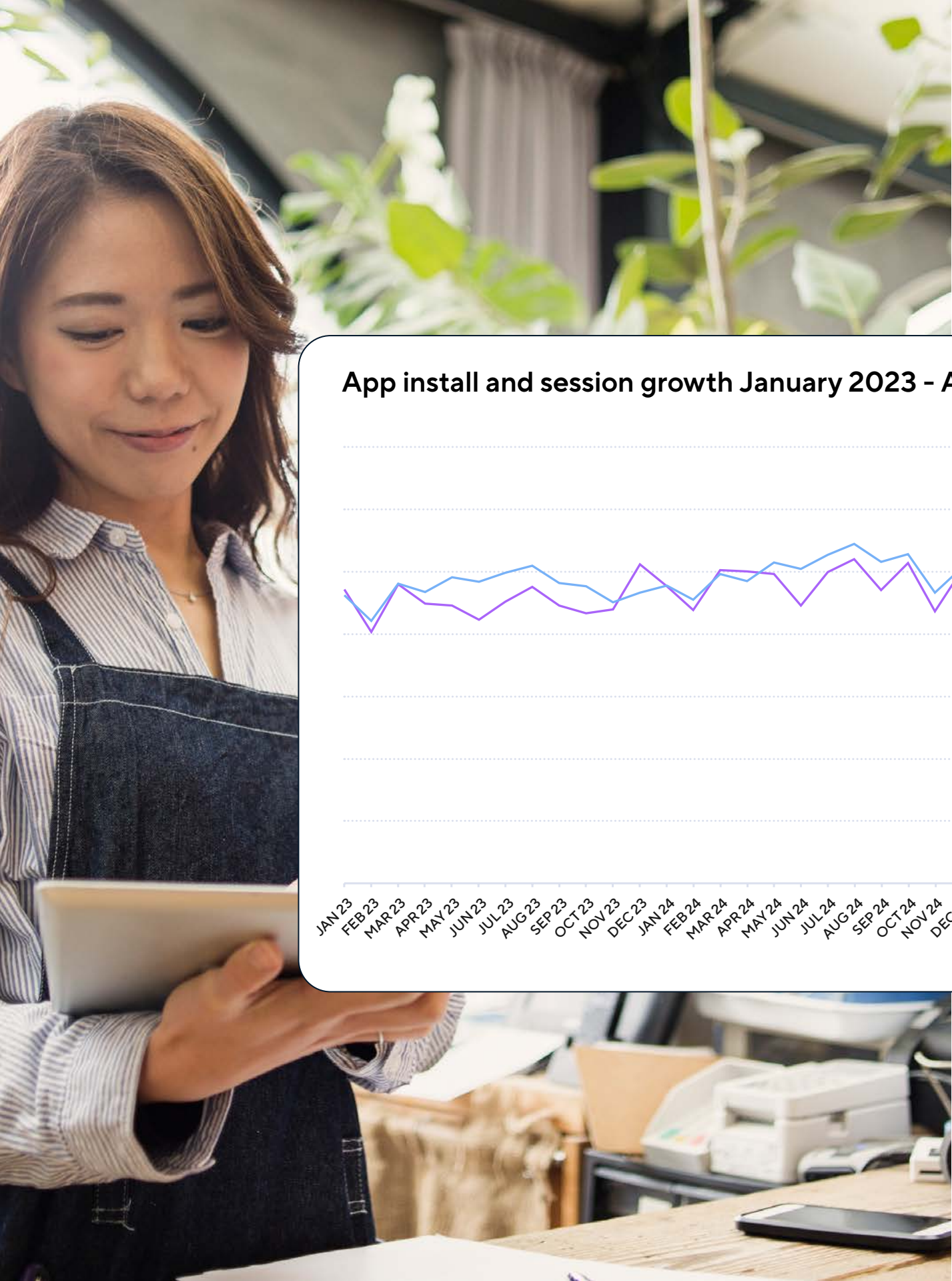
# Consent slowly climbs: Japan's ATT rates increase across most app categories

App Tracking Transparency (ATT) opt-in rates (among iOS users served the prompt) in Japan climbed from 20.7% in H1 2024 to 21.4% in H1 2025, reflecting steady improvements in user trust. Gaming led all verticals at 31%, followed by travel (24.3%), publications (18.6%), and shopping (18%). Gains were also seen across health & fitness (17.7%), utilities (17.9%), and finance (14.5%). Food & drink and entertainment, however, declined to 14.9% and 16.9%, respectively.

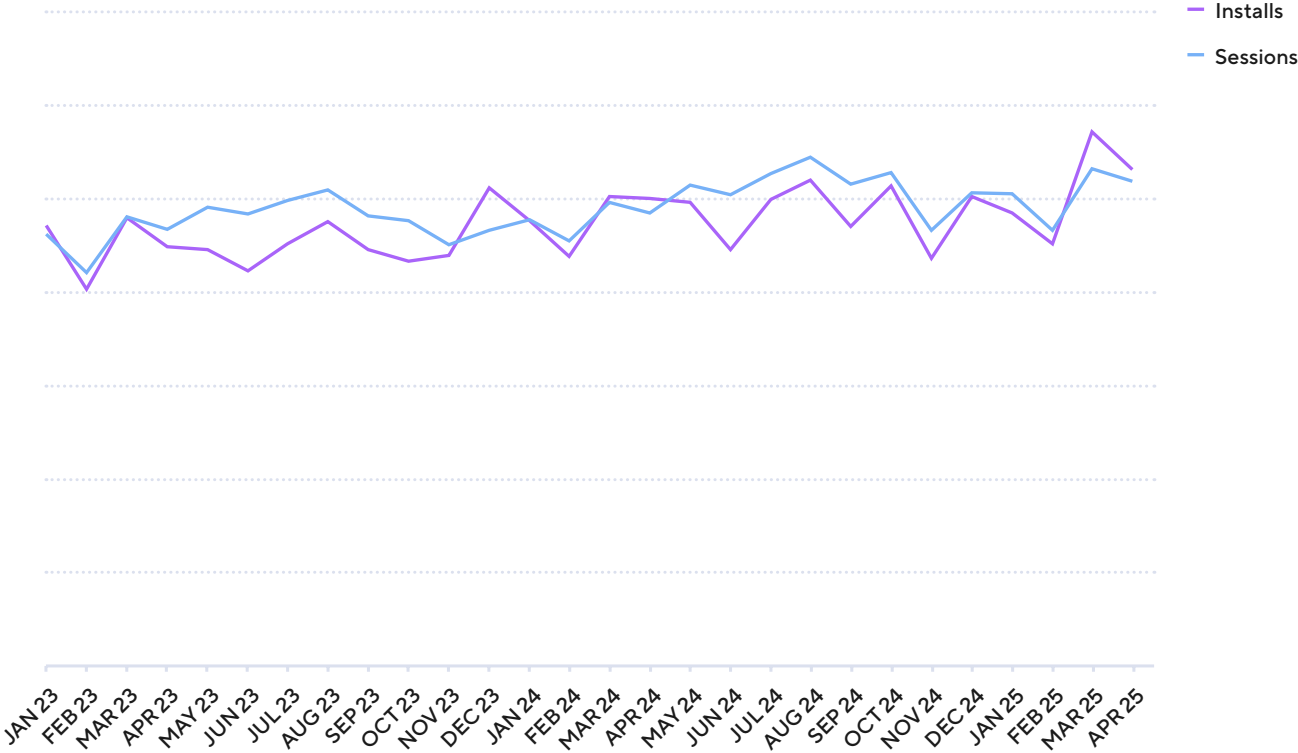
Japan's opt-in rates are low compared to global figures, and considering the market's high share of iOS users, it's a critical space to monitor. The numbers seen highlight the importance of refining opt-in journeys, not just at the point of prompt, but throughout the user experience. For marketers focused on iOS, securing consent isn't just a compliance box; it's a long-term advantage for better targeting, retention, and performance.







App install and session growth January 2023 - April 2025 (Japan)



# An overview of the Japanese app market

Overall app installs in Japan grew 7% YoY in 2024, while sessions rose by 6%. In 2024, August marked the high point, with installs 5% and sessions 6% above the annual average. October and April also outperformed the average, and the summer months saw steady session gains. In 2025 so far, March and April have led growth, with installs up 8% and 6% compared to the H1 average, and sessions rising 2% and 3%—signaling a strong start to the year.

# Methodology

## ADJUST

**VERTICALS:**

Finance/fintech, gaming, entertainment, comics

**REGIONS:**

Global, Japan, U.S.

**DATASET:**

A mix of Adjust's top 5,000 apps and the total dataset of all apps tracked by Adjust. Our data comes from two sources, one including a list of 45 countries and one with approximately 250 based on the ISO 3166-1 standard.

**DATE RANGE:**

January 2023 - May 2025

**RATIOS AND SHARES:**

Paid/organic is expressed as a ratio, where X:1. A value of 3 (3:1), for example, means that for every 100 organic installs, there are 300 paid installs.

**All dollar amounts are represented in USD.**

## Sensor Tower

**VERTICALS:**

Gaming, E-commerce, Fintech, Entertainment, Short Drama, Film & Television Streaming, Books and Comics. Apps were classified using Sensor Tower's App IQ taxonomy as of 3rd June 2025.

**REGIONS:**

Japan

**DATE RANGE:**

January 2023 - May 2025

**DATASET:**

Sensor Tower cultivates rich market insights into the trends shaping businesses in the global digital economy. The analysis is based on data from Sensor Tower Store Intelligence and Game Intelligence. Sensor Tower Store Intelligence provides download and revenue estimates across 95 countries, 12 regions and 25 categories to generate deep insights into the global mobile market with proprietary data models of the Apple Store and Google Play data. Sensor Tower's Game IQ drills down into hit mobile gaming strategies through advanced gaming taxonomy offering in-depth analysis of sub-genre, theme, art style, monetization, meta features and more.

Demographic data—such as gender and age breakdowns by app category—come from Sensor Tower's Audience Insights, powered by our first-party Android panel of millions of global consumers. Panelists opt in to share app and ad data, and we use privacy-enhancing technologies to protect their identities.

# Key takeaways

3%

Gaming app installs in Japan rose 3% YoY in H1 2025.

27%

Card and casino games installs increased 27% and 138%, with sessions up 127% and 36%.

50%

Finance app installs in Japan jumped 50% YoY in H1 2025, while sessions climbed 22%.

5.07↑

Finance app session lengths in Japan reached 5.07 minutes, their highest in three years.

14%

Entertainment app installs in Japan increased 14% YoY in H1 2025, while sessions rose 5%.

72%

iOS users accounted for 72% of entertainment app sessions in Japan.

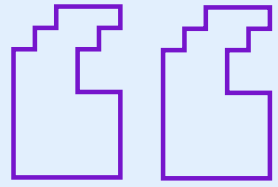
17.57↑

Comic app installs in Japan fell 17% YoY, but session lengths reached a high of 17.57 minutes.

1.55↑

Early engagement in Japan stayed strong, with 1.55 sessions per user on day 0.



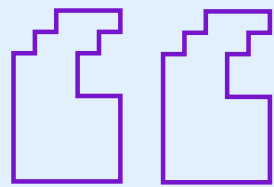


“Japan’s app economy in 2025 is marked by diversification and discipline. Finance apps are seeing rapid, sustained growth, entertainment is fragmenting into high-performing verticals like short drama, and even subtle shifts—like rising ATT opt-in rates—signal deeper engagement and user trust. Marketers are adapting with more localized, AI-driven, cross-functional strategies built for performance and resilience. Success in this market means pairing smart execution with privacy-conscious measurement that reveals which channels, creatives, and experiences are truly moving the needle.”

**ADJUST**



Naoki Sassa  
**General Manager,  
Japan**



“Japan’s app economy is entering a new phase of transformation. While it remains a global leader in innovation and engagement, growth is now fueled by a broader mix of verticals—from the rapid rise of finance apps to emerging entertainment niches like short drama. This shift brings both opportunity and complexity, with each category requiring distinct approaches to user acquisition and monetization. In this evolving landscape, data-driven decision-making is key. With the right insights, publishers can identify emerging trends, understand user behavior, and build strategies that drive sustainable growth in Japan’s dynamic and increasingly diverse app market”



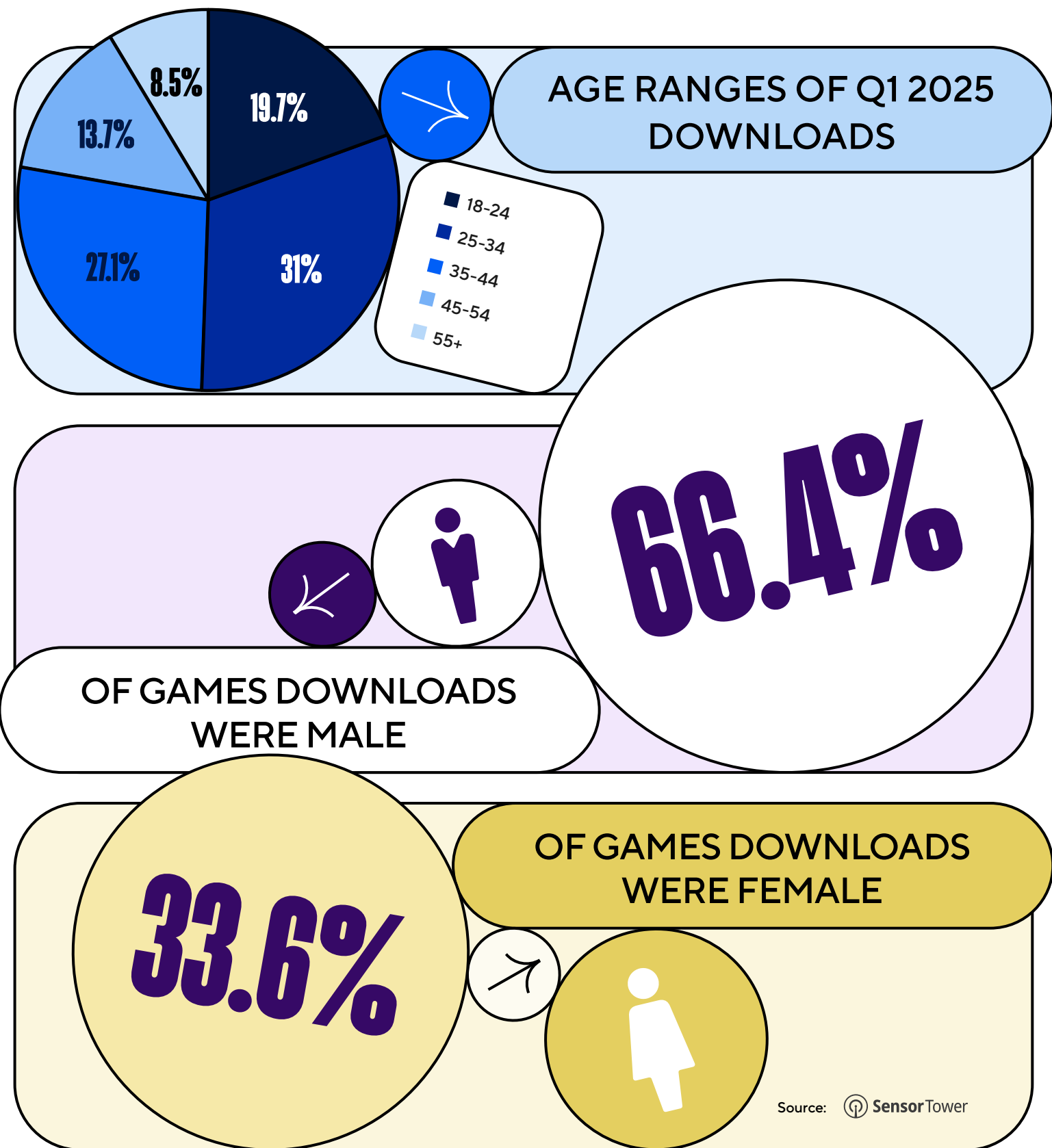
Donny Kristianto  
**Principal Analyst**

PART 1

# Gaming

























↓ Top 10 gaming apps by downloads in Q1 2025 (Japan)

1	 Pokémon TCG Pocket	
2	 Chiikawa Pocket	
3	 Color Block Jam	
4	 Car Jam	
5	 Archer0 2	
6	 Madoka Magica Magia Exedra	
7	 Screw Sort 3D - Pin Puzzle	
8	 Whiteout Survival	
9	 Another World 異世界 異世界 ~次はどの作品を、集めよう~	
10	 Block Blast!	

\$ Top 10 gaming apps by consumer spend in Q1 2025 (Japan)

 Pokémon TCG Pocket	
 Monster Strike モンスターストライク	
 Last War:Survival Game	
 Umamusume: Pretty Derby	
 Fate/Grand Order	
 Dragon Quest Walk ドラゴンクエストウォーク 歩く楽しみが増える位置情報ゲーム	
 Whiteout Survival	
 DRAGON BALL Z DOKKAN BATTLE	
 Professional Baseball Spirits A プロ野球スピリッツA	
 Honkai: Star Rail	

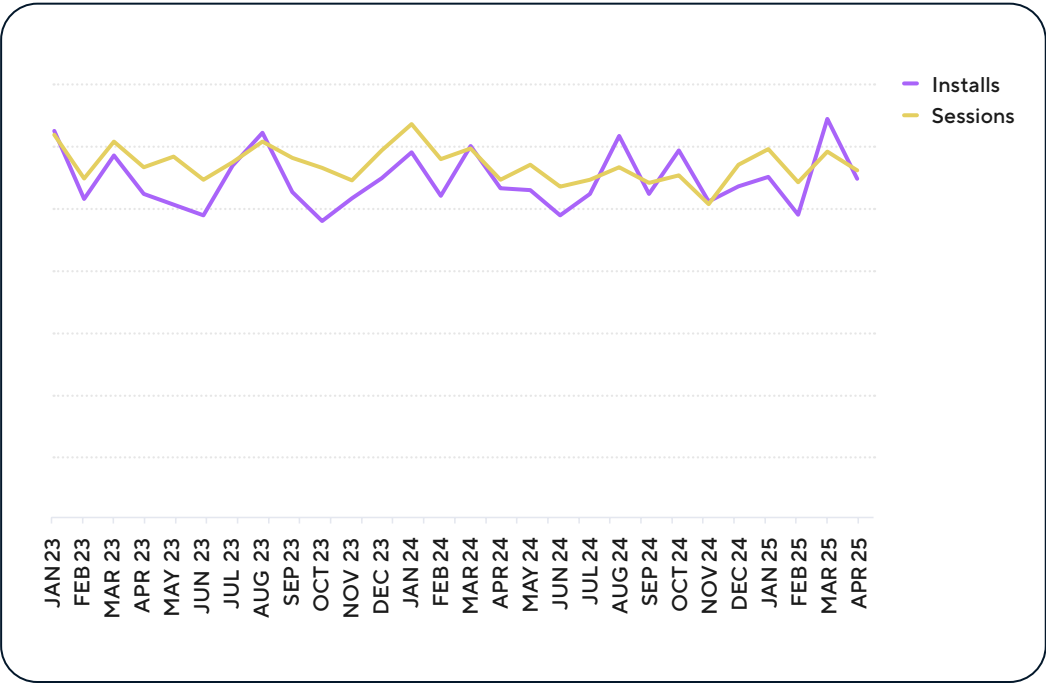
Source:  SensorTower

# Installs and sessions

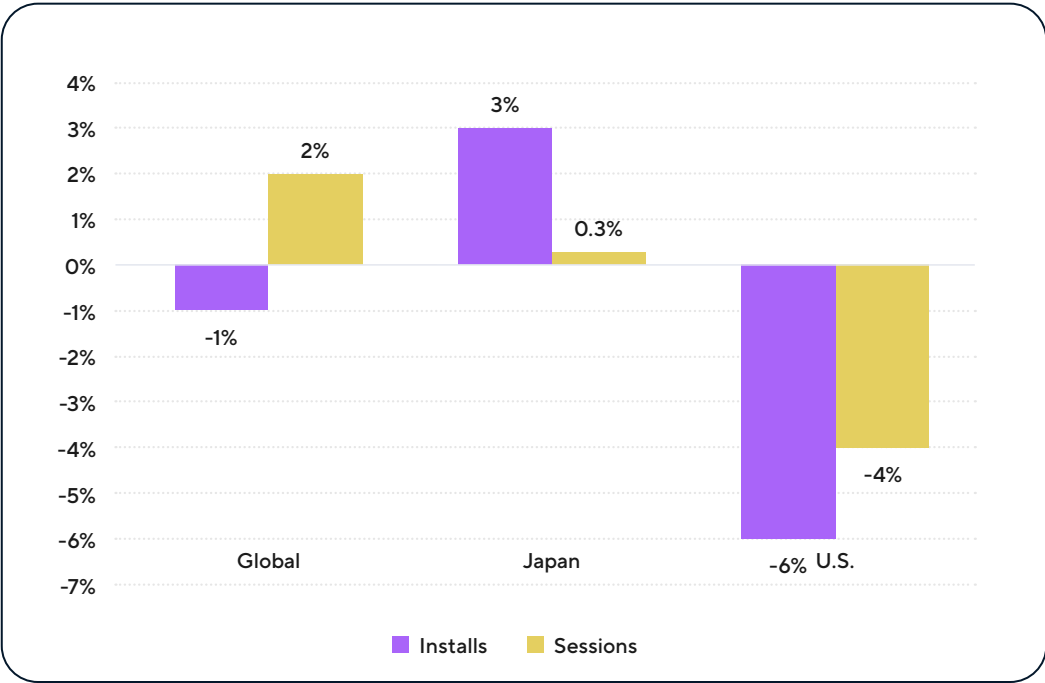
Gaming app performance in Japan remained consistent throughout 2024, with notable peaks in April (+5% installs), August (+5%, +6%), and October (+4%, +3%). Installs outpaced sessions in the second half of the year. While installs saw modest YoY growth of 1% in 2024 and sessions dipped by 3%, signs of momentum are re-emerging. In 2025 so far, installs performed best in March (+8% above the H1 average) and April (+6%), with sessions up 2% and 3%, respectively.

Japan’s mobile gaming market remained stable in H1 2025, with installs rising 3% YoY and sessions holding steady with a 0.3% lift. Globally, installs dipped slightly (-1%) while sessions rose 2%. In the U.S., both metrics declined. These figures offer important context, underscoring Japan’s consistent performance and the continued performance power of mobile gaming.

Gaming app install and session growth  
January 2023 - April 2025 (Japan)

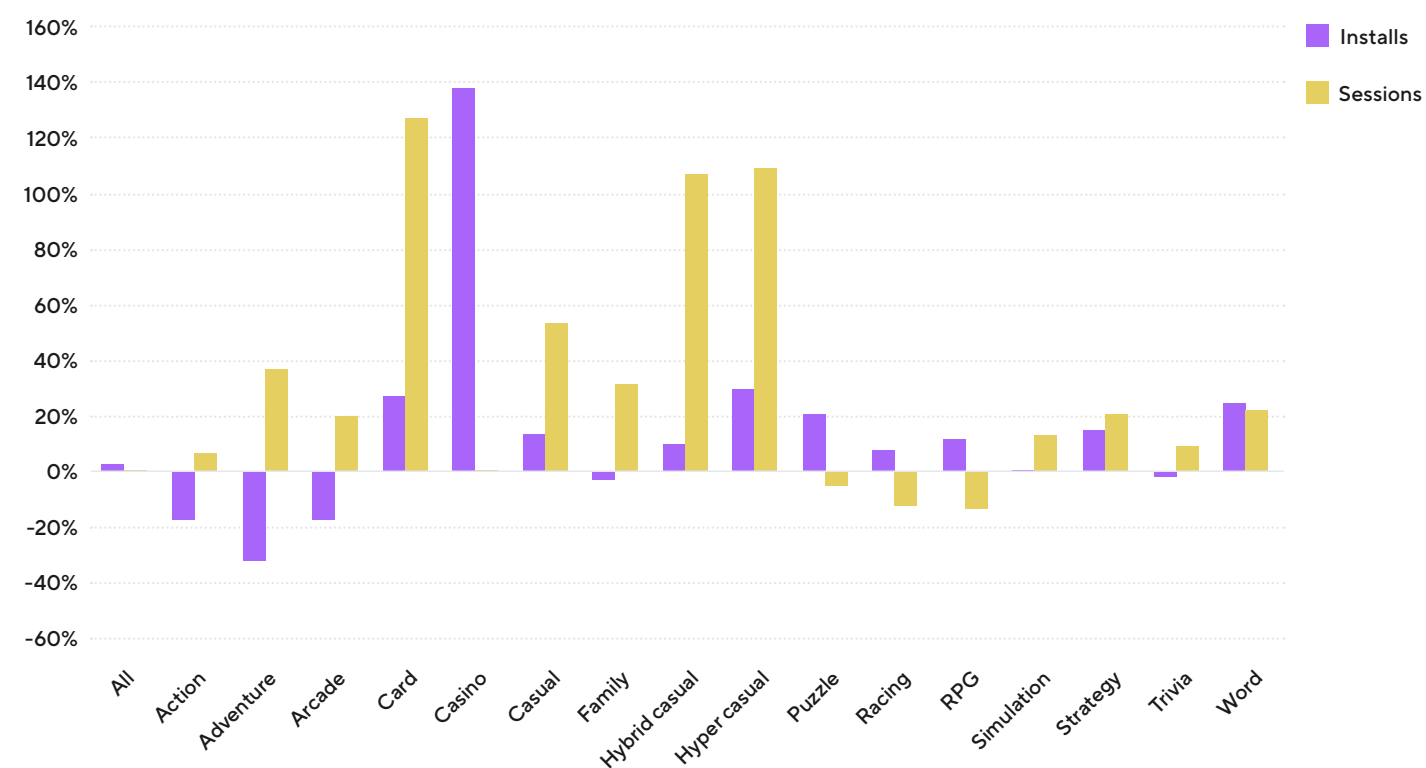


Gaming app install and session growth percentages  
YoY H1 2025 vs. H1 2024

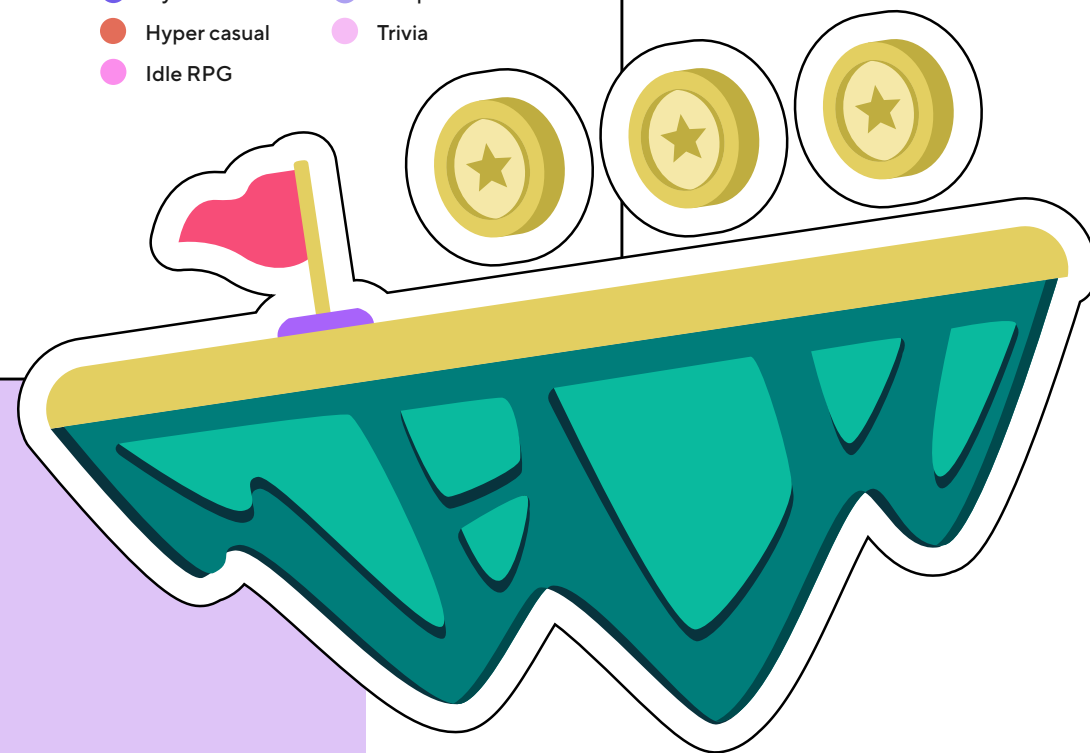
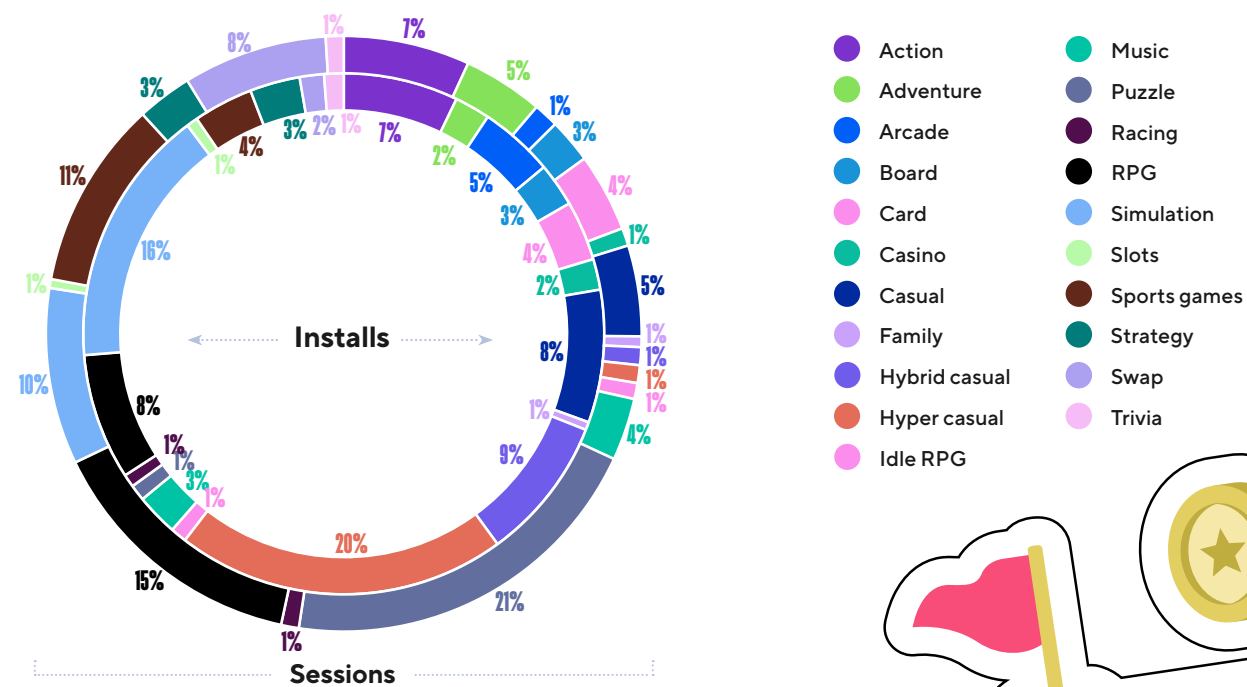


Gaming growth in Japan varied widely across subverticals in H1 2025 compared to H1 2024. Card games climbed 27% YoY in installs and 127% YoY in sessions, while casino games led overall with a 138% install surge. Casual games rose 14% in installs and 54% in sessions, and hyper casual followed closely with 30% and 109% growth, respectively. Adventure (+37%), family (+32%), and arcade (+20%) games saw strong session gains despite lower install volumes.

**Gaming app install and session growth percentages by subvertical YoY H1 2025 vs. H1 2024 (Japan)**



## Gaming app installs and sessions by subvertical 2024 - Q1 2025 (Japan)



Hyper casual games once again capture the largest share of installs at 20%, though they account for less than 1% of sessions, reflecting high churn and short play cycles. Puzzle games told a different story, with only 1% of installs but a notable 21% of sessions. RPGs showed a balanced profile with 8% of installs and 15% of sessions, while simulation apps showed their prevalence (16% installs, 10% sessions). Genres like sport games (4% installs, 11% sessions) and strategy (3% for both) indicate leaner acquisition but higher engagement.

These patterns reinforce the importance of genre-specific UA and monetization strategies: ad-driven genres focus on volume, while IAP-heavy genres benefit from loyalty and retention.

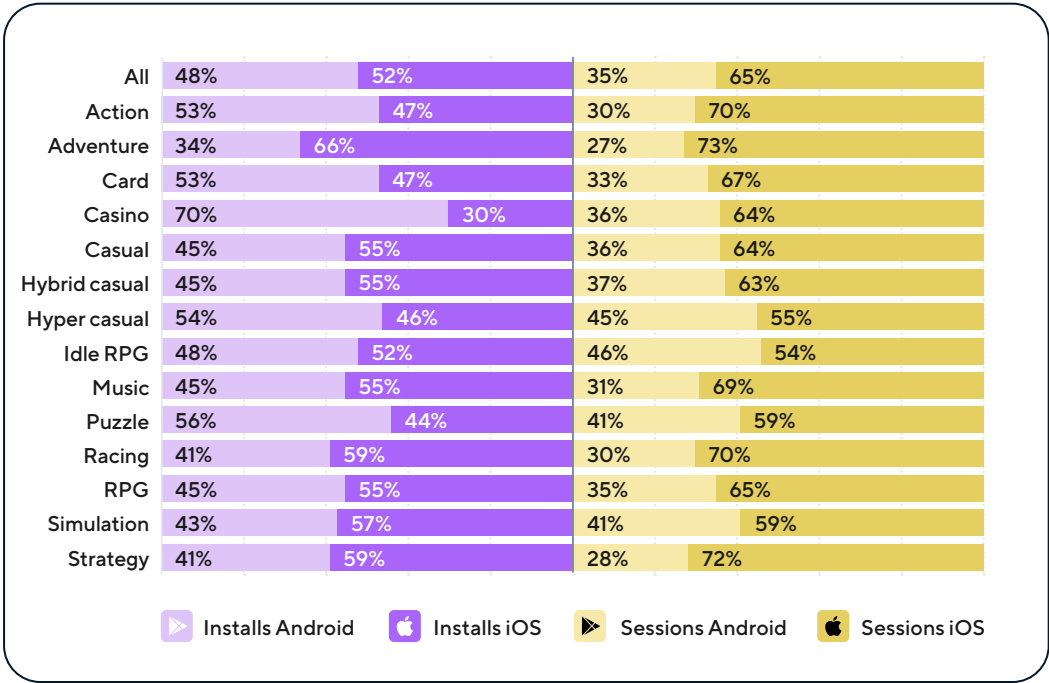


In Japan, iOS users drove 52% of gaming installs and 65% of sessions from 2024 to H1 2025. Genres like strategy (59% installs, 72% sessions), adventure (66%, 73%), and racing (59%, 70%) saw a stronger iOS session share. Android led in installs for casino (70%) and hyper casual (54%)—genres typically driven by high-volume UA.

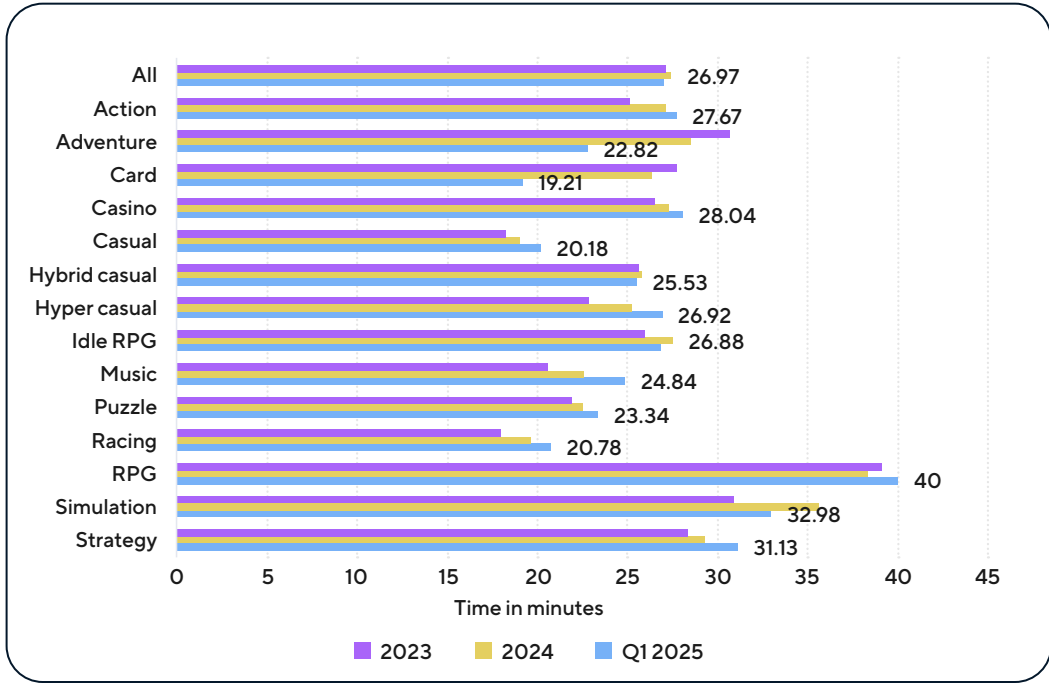
These differences highlight how platform usage patterns vary by genre, influenced by user behavior, monetization strategies, and gameplay design.

Gaming session lengths in Japan averaged 26.97 minutes in H1 2025, down from 27.42 in 2024. RPGs led the chart with a session average of 40 minutes, followed by simulation (32.98) and strategy (31.13). Music, hyper casual, and puzzle apps saw steady gains, and action climbed to 27.69 minutes.

Gaming app installs and sessions by platform 2024 - H1 2025 (Japan)

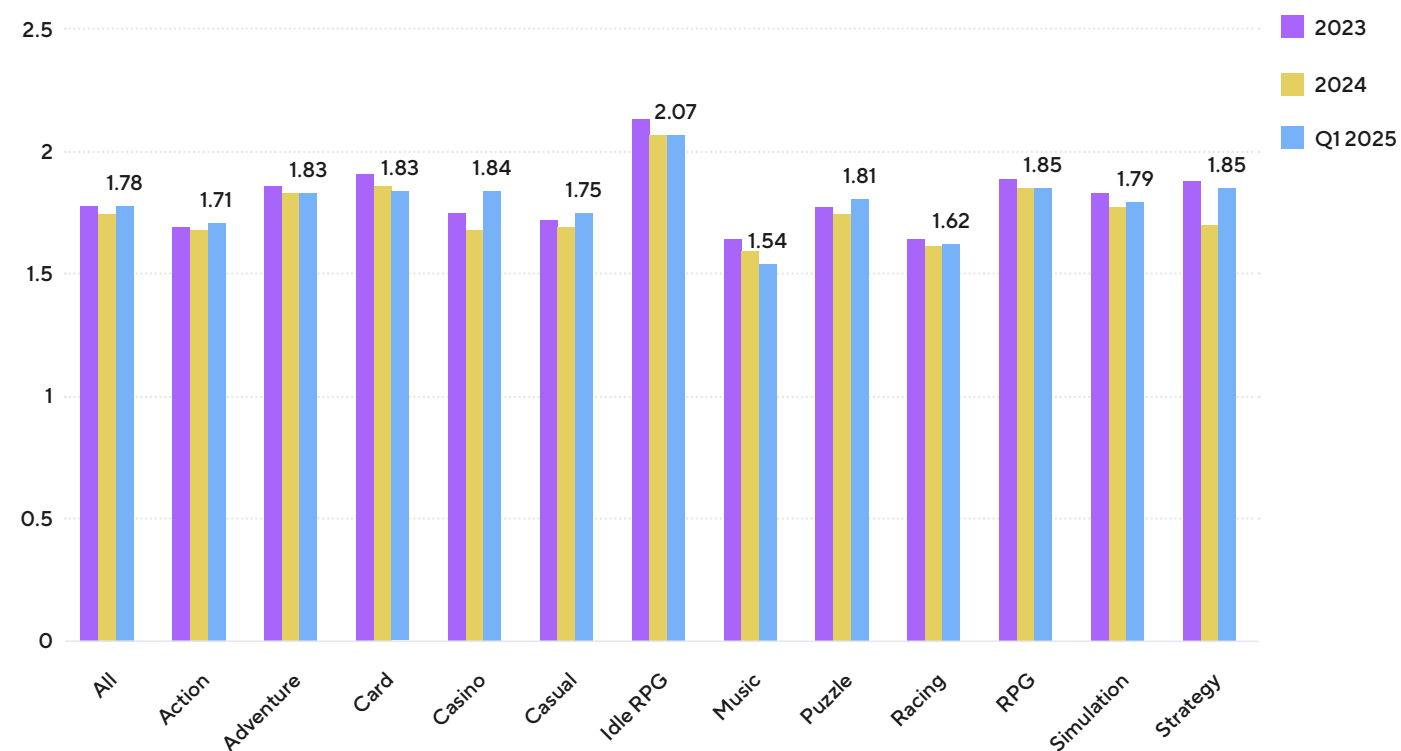


Gaming app session lengths 2023 - H1 2025 (Japan)



In Q1 2025, gaming apps in Japan had a median of 1.78 sessions per user on day 0, returning to 2023 levels after a slight dip in 2024. Idle RPGs consistently topped the chart across all three periods, with 2.07 sessions in Q1 2025. Strategy, RPG, and simulation followed closely, each maintaining or regaining strong early engagement. Card and casino apps remained stable, while casual and puzzle games saw small but steady gains.

**Gaming app sessions per user per day on day 0  
2023 - Q1 2025 (Japan)**



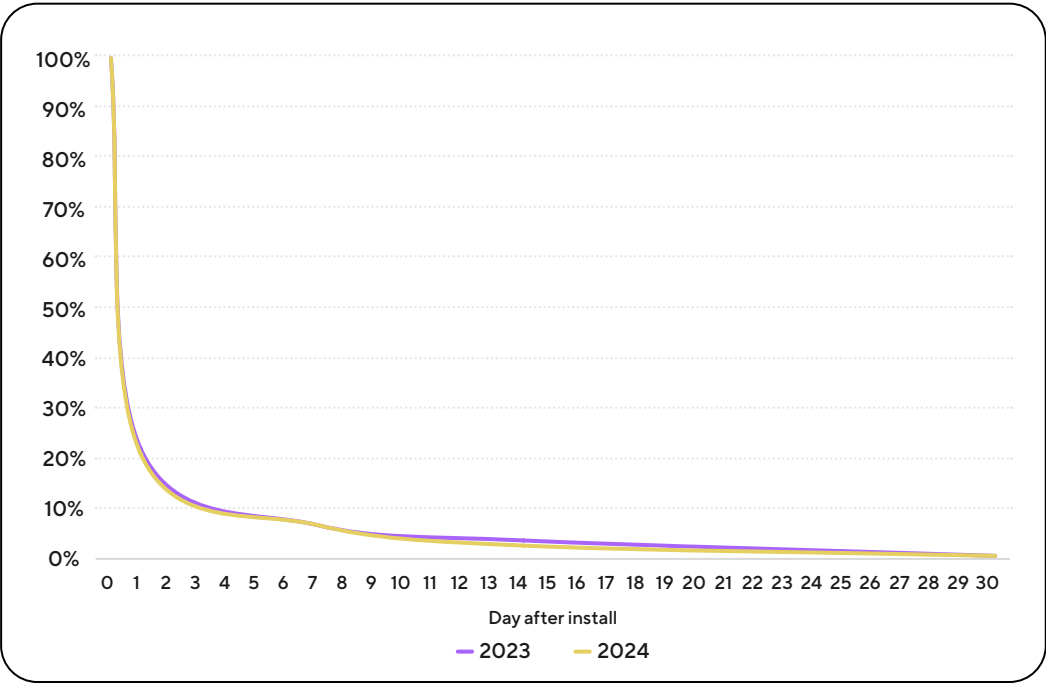
# Finding and keeping users

Gaming app retention in Japan followed a familiar curve in 2024, with 23% of users returning on day 1 and 9% still active by day 7, mirroring 2023. Day 14 dropped slightly from 6% to 5%, while day 30 held steady at 3%.

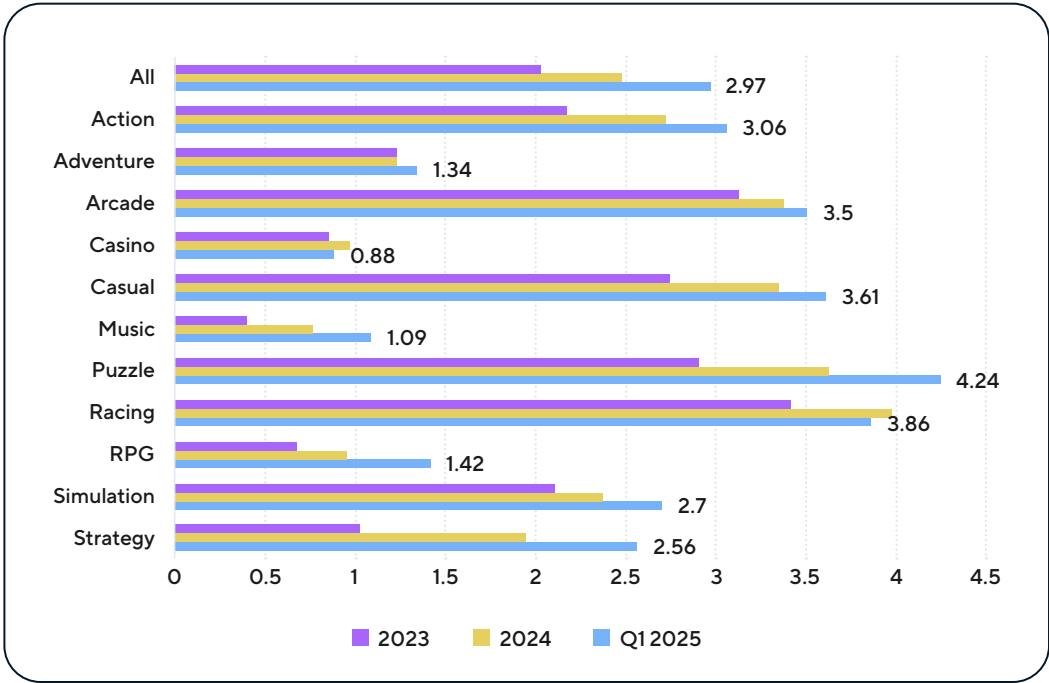
To boost mid- and long-term retention, developers can tap into spaces like live ops and AI-personalized rewards that match local play habits—in addition to UX and customer journey best practices.

Japan’s gaming apps installs leaned more heavily on paid UA in Q1 2025, with the overall paid/organic ratio rising to 2.97 (up from 2.03 in 2023). Puzzle (4.24), racing (3.86), and casual (3.61) topped the list. Genres like RPG (1.42) and music (1.09) also increased, but retained a higher share of organic volume.

Gaming app retention rates 2023 -2024 (Japan)



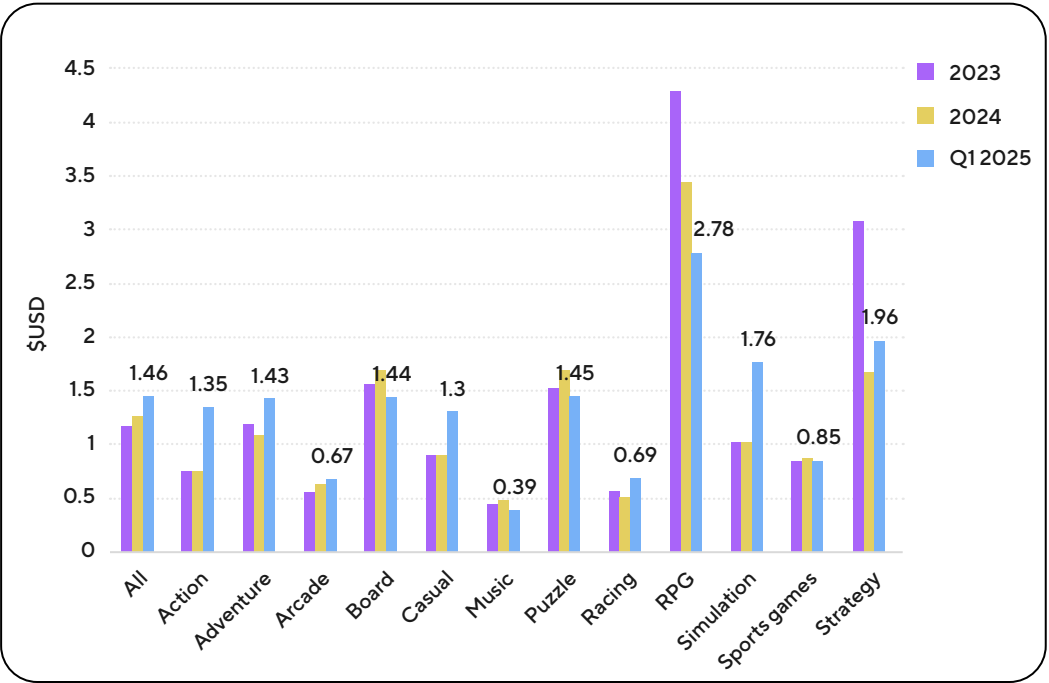
Gaming app paid/organic ratio 2023 - Q1 2025 (Japan)



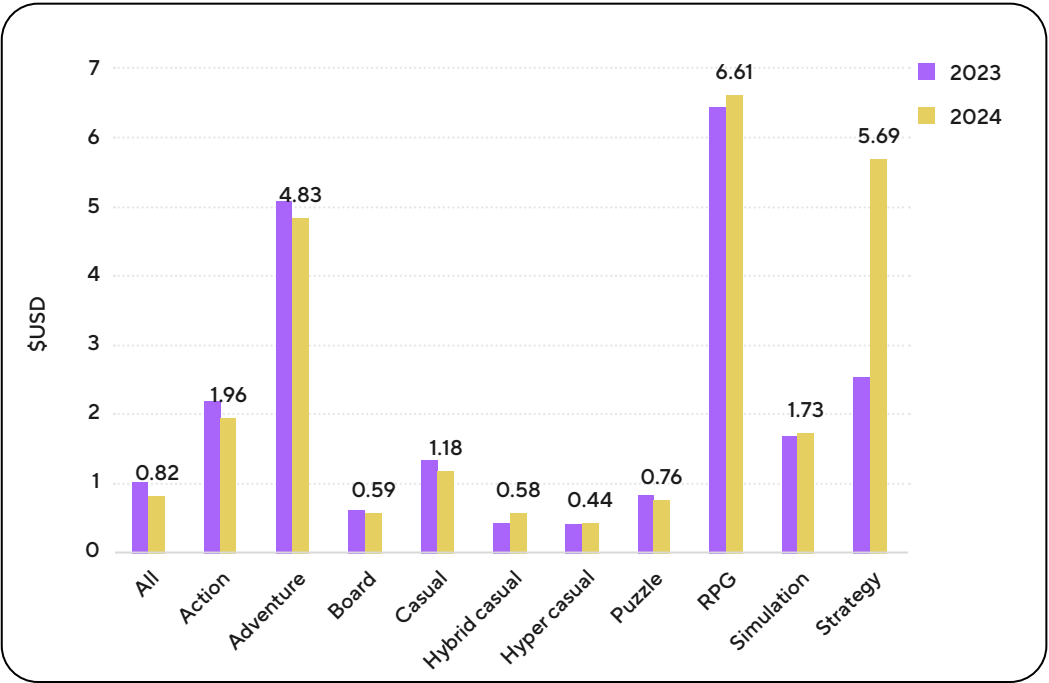
Gaming CPIs in Japan climbed across most genres in Q1 2025, averaging \$1.46—up from \$1.26 in 2024. RPGs remained the highest at \$2.78, though down from \$4.28 in 2023 and \$3.44 in 2024. Strategy (\$1.96) and simulation (\$1.76) also trended up. Casual and music apps saw notable YoY jumps, reflecting increased competition for early-stage users in these genres.

In 2024, RPGs led Japan’s gaming ARPMAU at \$6.61, followed by strategy (\$5.69) and adventure (\$4.83). While most genres saw slight YoY declines, hybrid casual rose to \$0.58 and simulation held steady at \$1.73. The overall ARPMAU dropped from \$1.03 to \$0.82, highlighting ongoing monetization pressure despite strong performance from core genres.

Gaming app CPI 2023 - Q1 2025 (Japan)



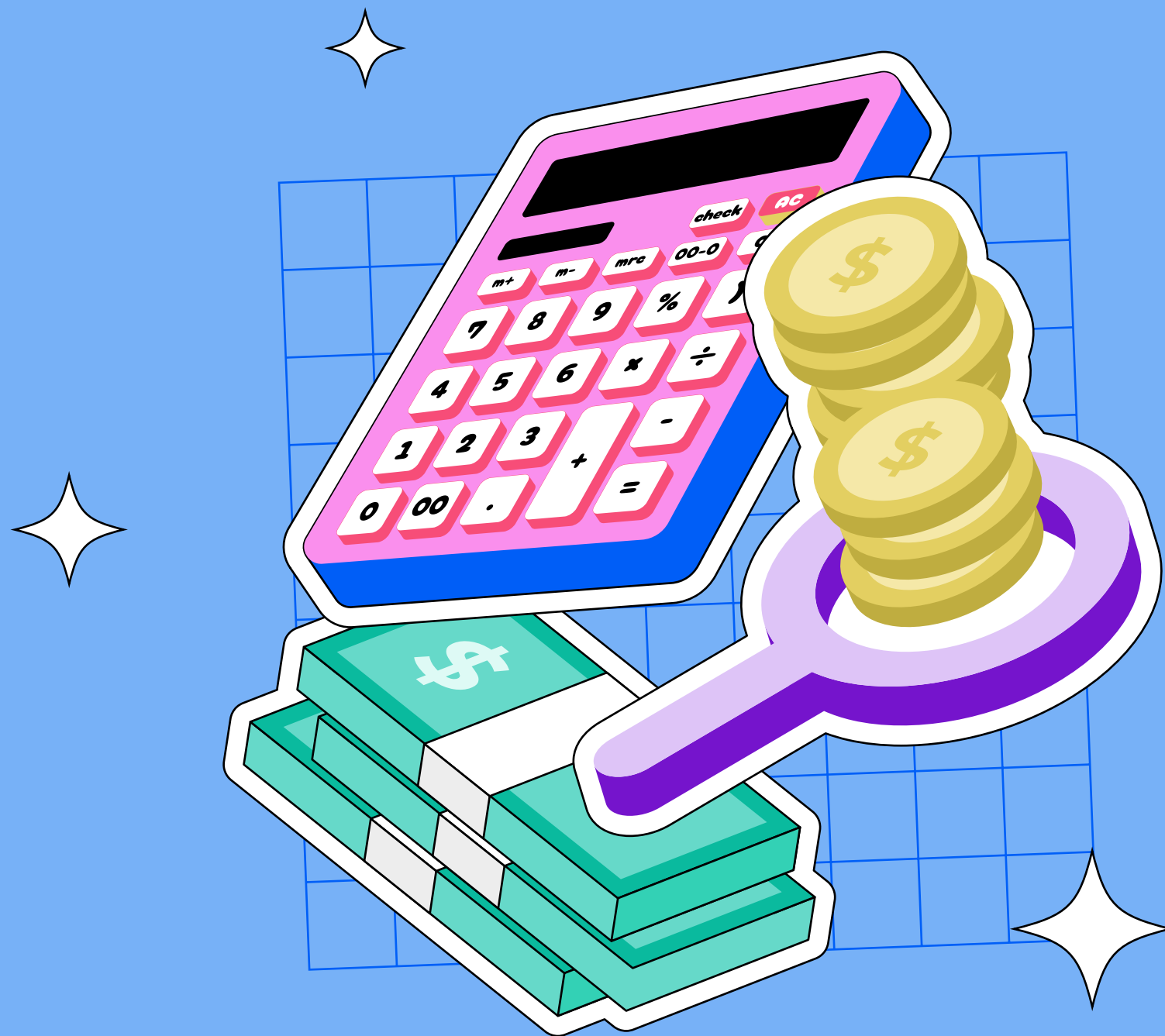
Gaming app ARPMAU 2023 -2024 (Japan)

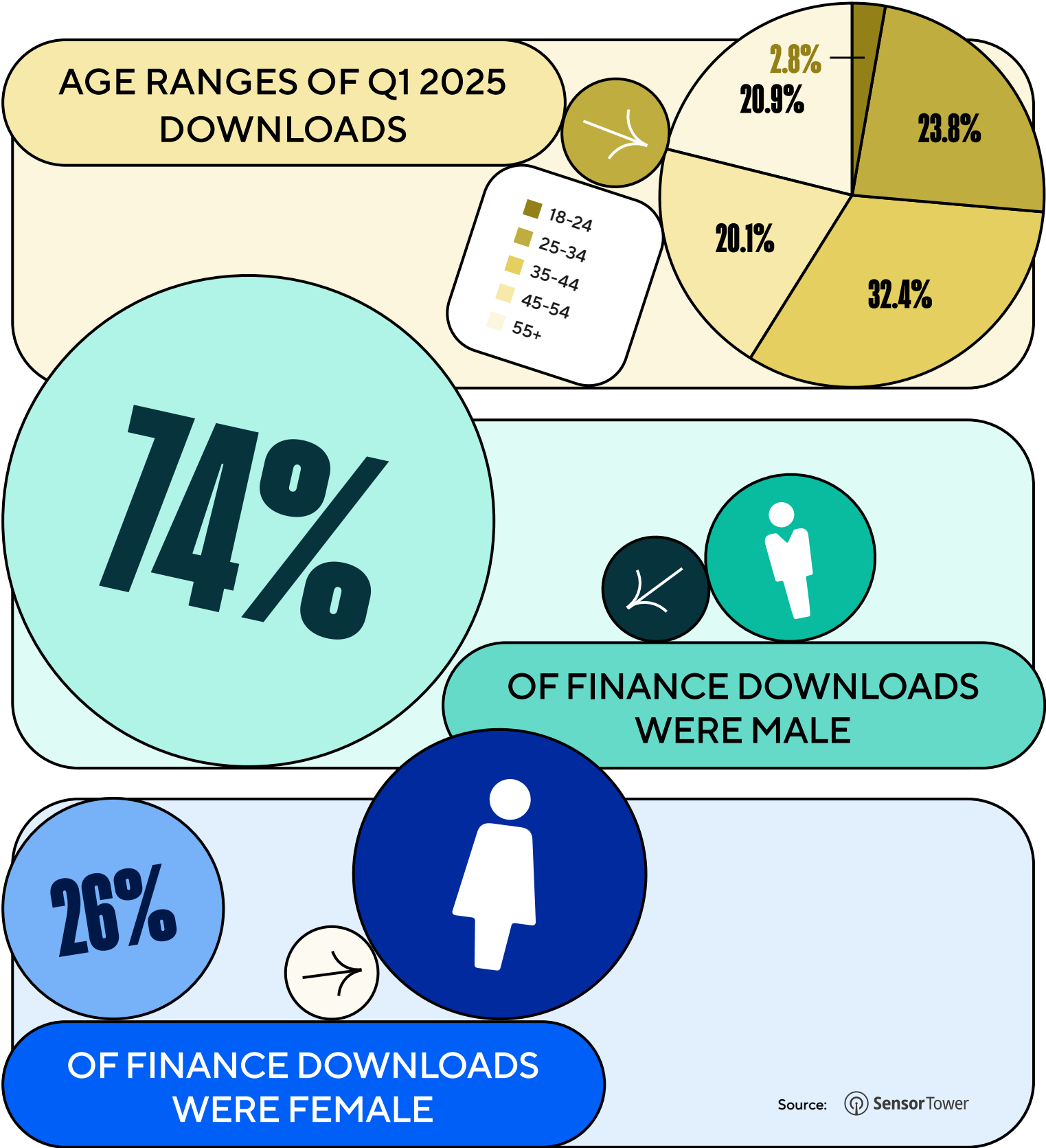




PART 2

# Finance





↓ Top 10 finance apps by downloads in Q1 2025 (Japan)

1	 Rakuten Pay 楽天ペイ-楽天ポイントカードも利用できるスマホ決済アプリ	
2	 PayPay-ペイペイ	
3	 Japan Post Bank ゆうちょ通帳アプリ-銀行 アプリ	
4	 Air Wallet エアウォレット	
5	 dPay d払い-スマホ決済アプリ、キャッシュレスでお支払い	
6	 Vpass 三井住友カード Vpassアプリ	
7	 V Point App Vポイントアプリ (旧名称: Tポイントアプリ)	
8	 Paidy	
9	 Sumitomo Mitsui Banking Corporation App 三井住友銀行アプリ	
10	 iGrow - 楽天証券の資産づくりアプリ	

\$ Top 10 finance apps by consumer spend in Q1 2025 (Japan)

 Money Forward ME 家計簿マネーフォワード ME - 人気の家計簿(かけいぼ)	
 freee Tax return filing 確定申告はfreee 会計ソフト - 会計アプリで青色申告	
 Everybody's Bank みんなの銀行	
 Taxnap 確定申告ならタックスナップ -スキマ会計アプリ	
 TradingView: Track All Markets	
 Zaim 家計簿Zaim - 貯金ができる人気家計簿 (かけいぼ)	
 Kabuu カビュウ - 株式投資管理・分析アプリ	
 Money Forward 確定申告はマネーフォワード 青色申告・白色申告対応	
 Moneytree 家計簿より楽チン	
 GoMining - Coin Mining App	

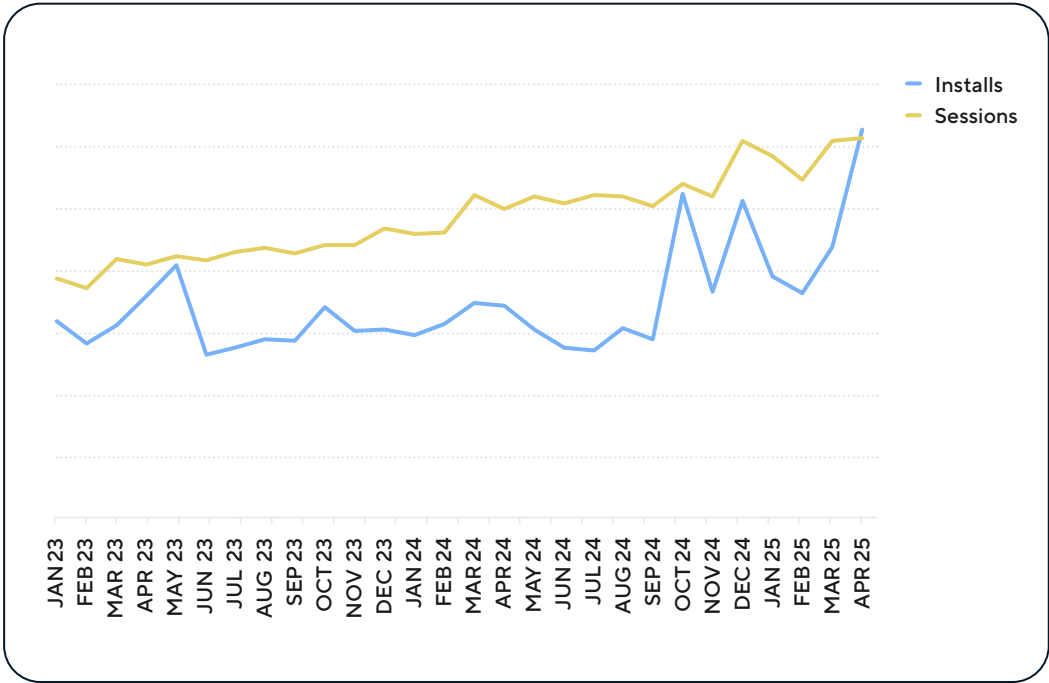
Source:  SensorTower

# Installs and sessions

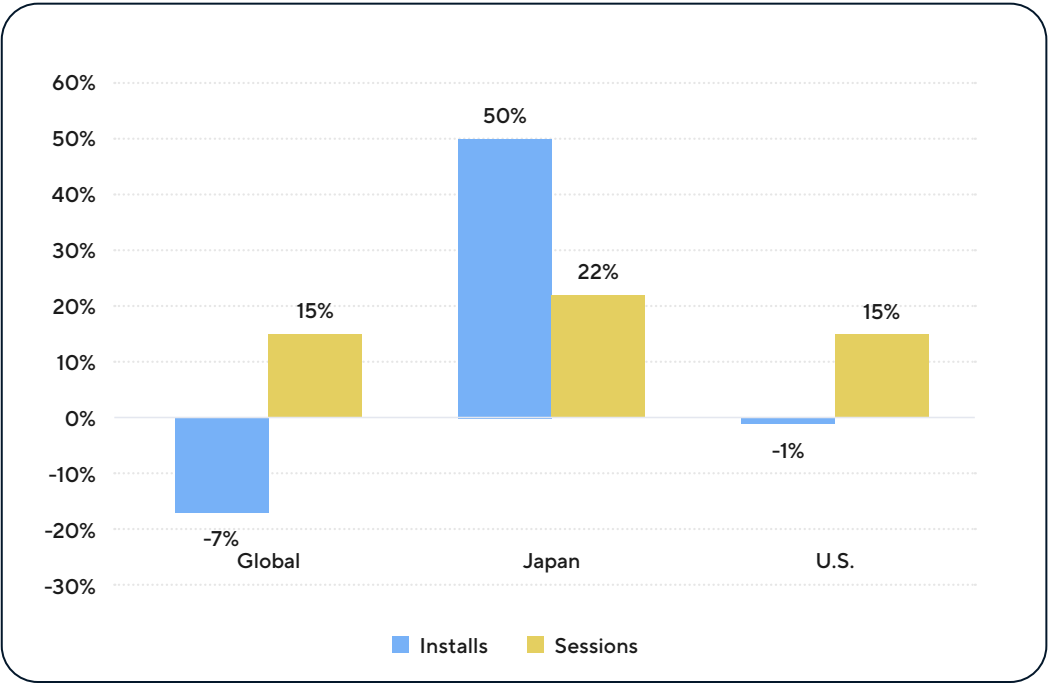
In 2024, Finance apps in Japan recorded 11% YoY growth in installs and a notable 23% in sessions. While most of 2024 trended below the year's average, momentum shifted in Q4 with spikes in October (+49%), November (+15%), and December (+45%). This upward trend extended into 2025, with installs up 45% in April compared to the H1 average.

In H1 2025, Japan's finance app market experienced strong momentum, with installs up 50% and sessions up 22% YoY. Sessions also grew globally and in the U.S. (both +15%), while install trajectories varied across regions.

Finance app install and session growth January 2023 - April 2025 (Japan)



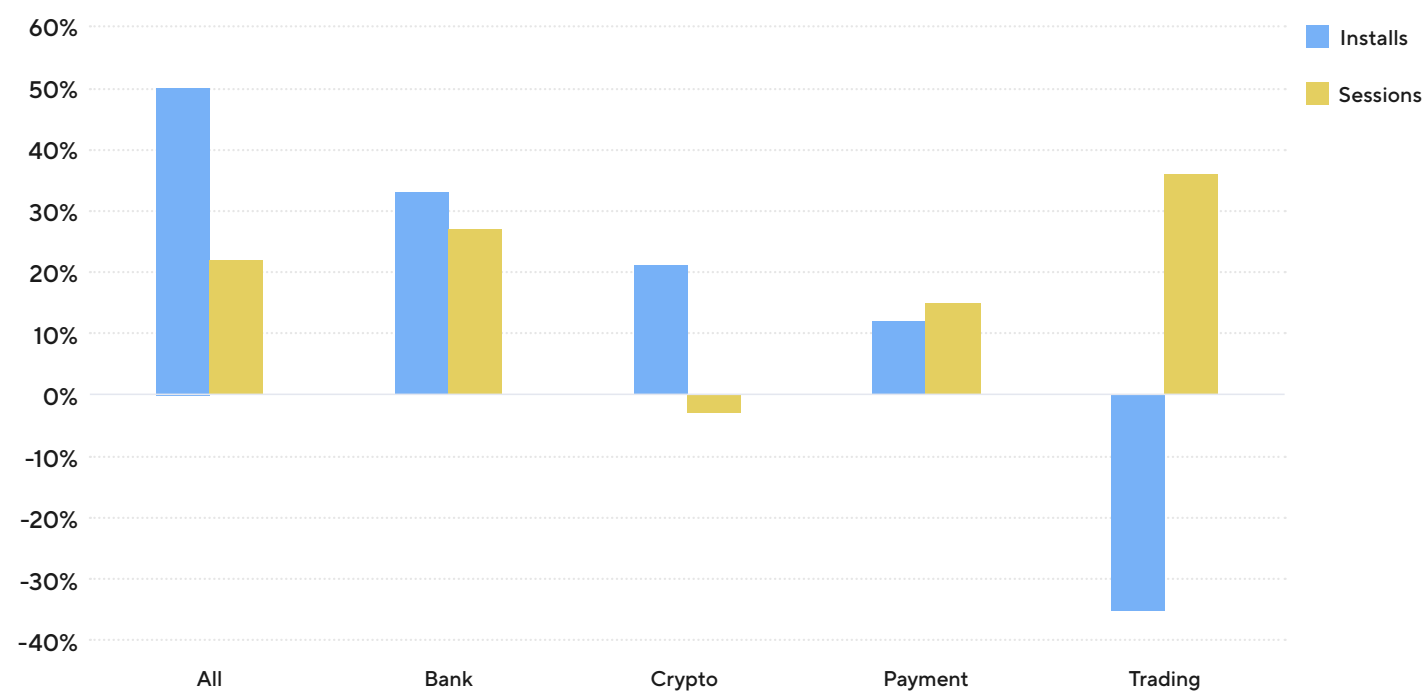
Finance app install and session growth percentages YoY H1 2025 vs. H1 2024



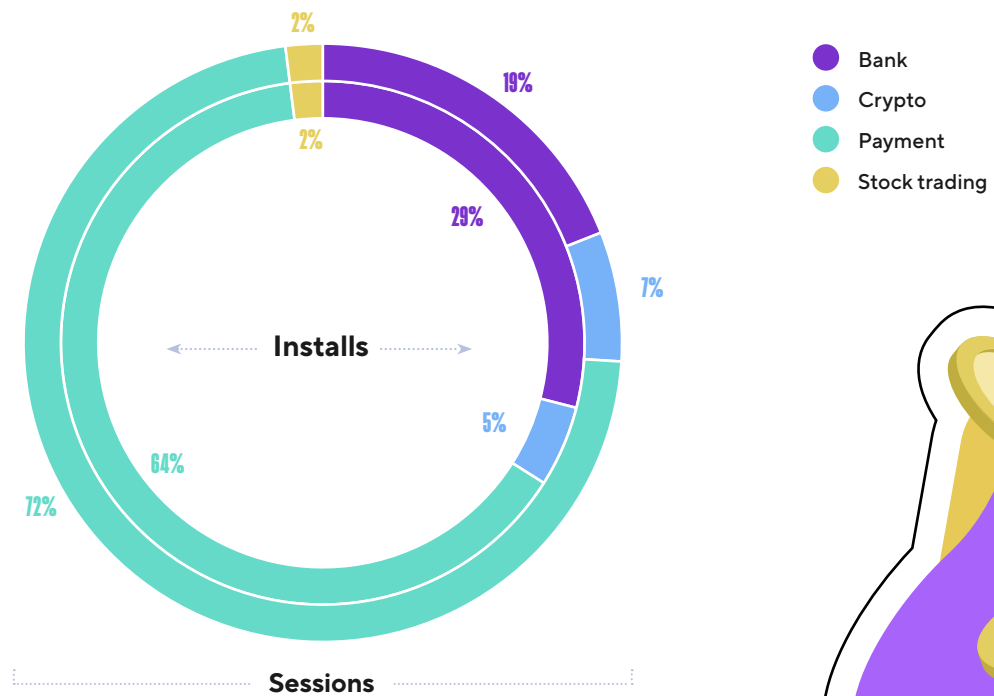


Growth in H1 2025 was strongest among banking apps, with installs and sessions up 33% and 27% YoY. Payment apps posted steady gains (+12% installs, +15% sessions), while crypto saw strong install growth (+21%) but a drop in sessions (-3%). Stock trading stood out for engagement, with sessions surging 36% despite a 35% decline in installs.

**Finance app install and session growth percentages by subvertical YoY H1 2025 vs. H1 2024 (Japan)**



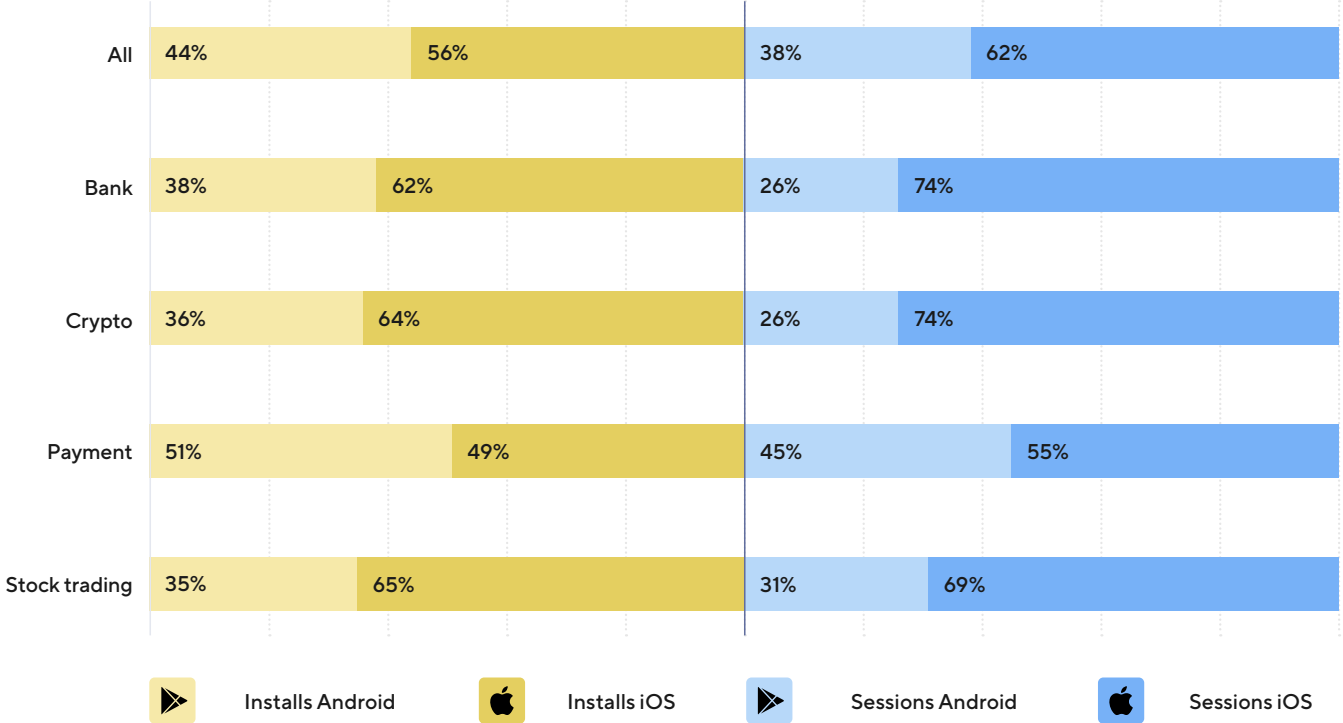
## Finance app installs and sessions by subvertical 2024 - Q1 2025 (Japan)



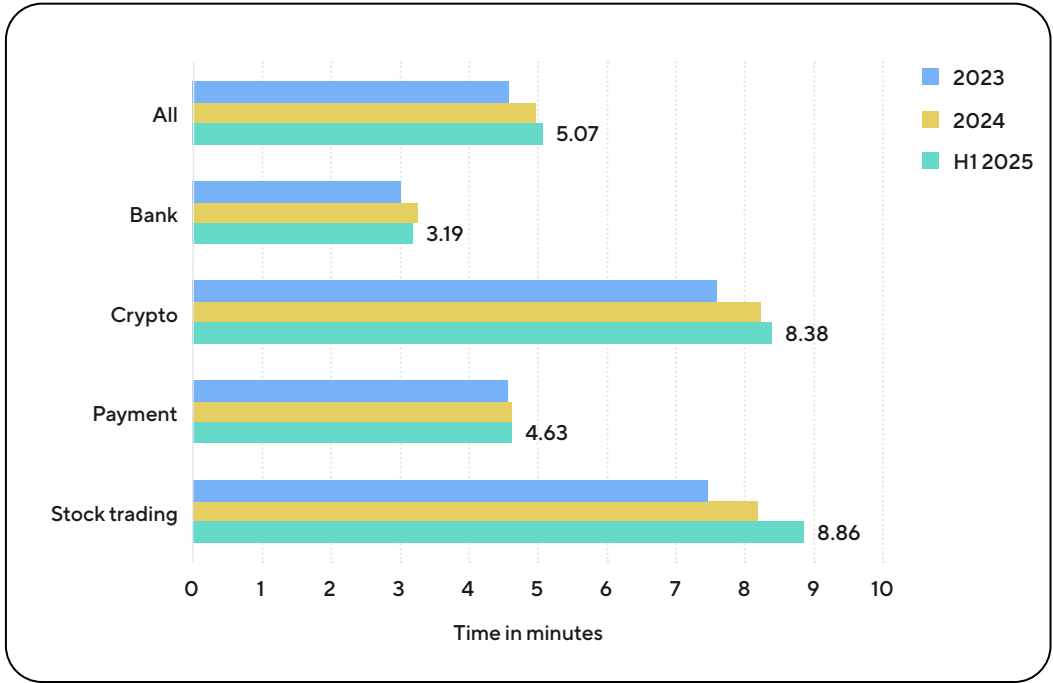
The largest share of installs and sessions within the finance vertical in Japan is represented by payment apps— 64% and 72%. Next is banking, with 29% of installs and 19% of sessions.

iOS accounts for the majority of finance app installs and sessions in Japan, making up 56% of installs and 62% of sessions. The split is most pronounced in the crypto (64% installs, 74% sessions) and banking (62%, 74%) subverticals. Payment apps were more balanced, with Android capturing 51% of installs and 45% of sessions.

Finance app installs and sessions by platform 2024 - H1 2025 (Japan)

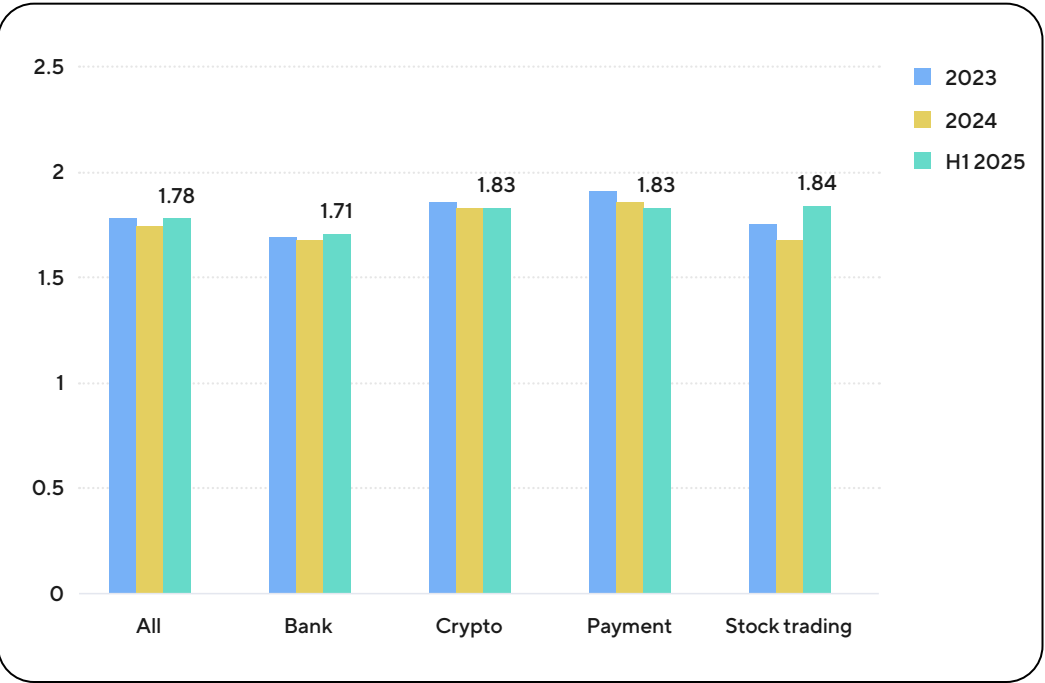


Finance app session lengths 2023 - H1 2025 (Japan)



Finance app session lengths in Japan continued to climb in H1 2025, reaching an average of 5.07 minutes—up from 4.98 in 2024 and 4.57 in 2023. Users spent the longest time in stock trading (8.86 min) and crypto (8.38 min) apps. Payment apps were steady at 4.63 minutes, while banking saw a slight dip to 3.19 minutes.

Finance app sessions per user per day on day 0 2023 - Q1 2025 (Japan)



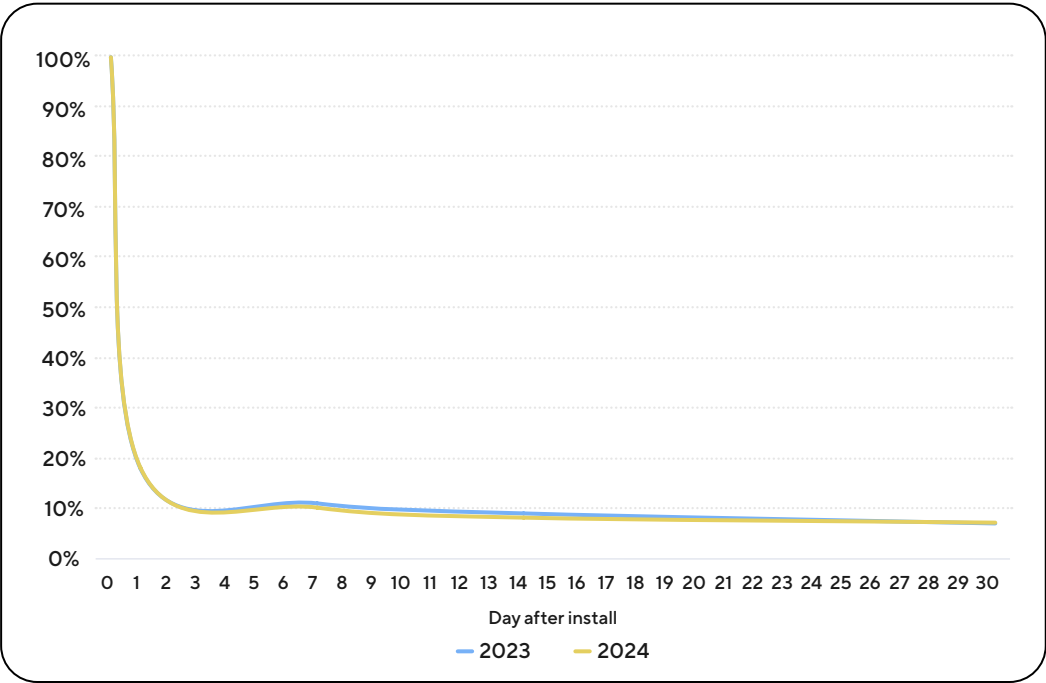
In Q1 2025, sessions per user on day 0 for finance apps in Japan returned to 2023 levels (1.78), following a slight dip in 2024 (1.74). Bank and stock trading apps saw the biggest YoY improvements, reaching 1.71 and 1.84, respectively. Meanwhile, crypto and payment apps experienced minimal change.

# Finding and keeping users

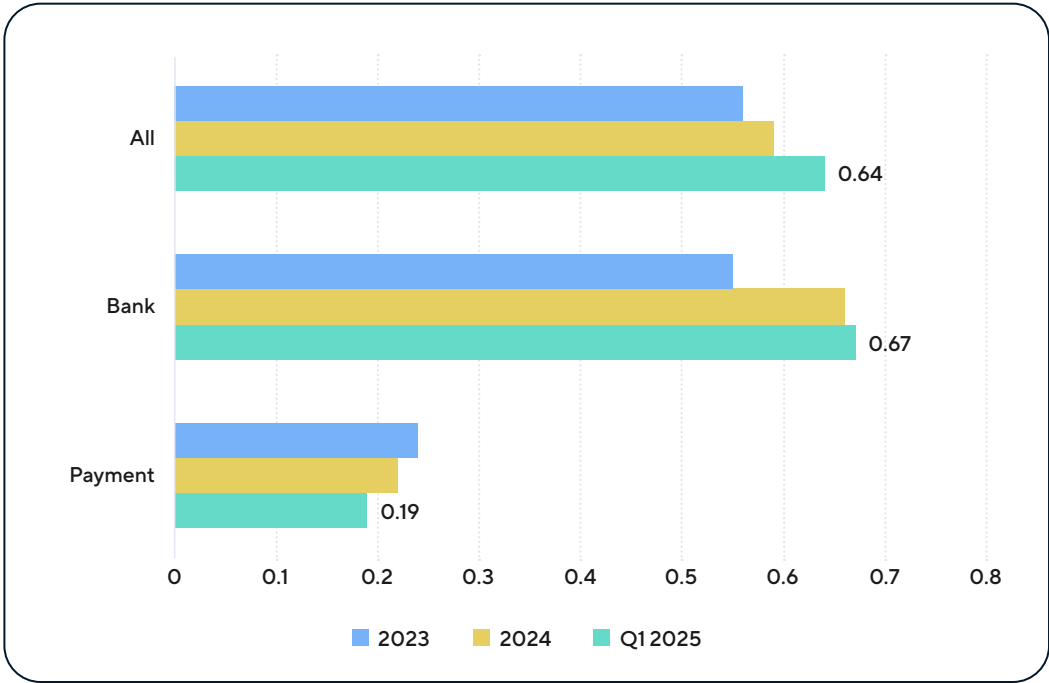
Finance app retention rates in Japan showed minor YoY shifts in 2024. Day 1 retention stood at 18%, while day 7 dipped slightly from 11% to 10%. By day 14, the rate decreased from 9% to 8%, before leveling off at 7% by day 30 in both years.

In Japan, the paid-to-organic ratio for finance apps rose to 0.64 in Q1 2025, up from 0.59 in 2024 and 0.56 in 2023, indicating a continued push in paid user acquisition. Banking apps maintained the highest ratio at 0.67, while payment apps leaned most heavily on organic, dropping to 0.19 from 0.24 in 2023.

Finance app retention rates 2023 -2024 (Japan)

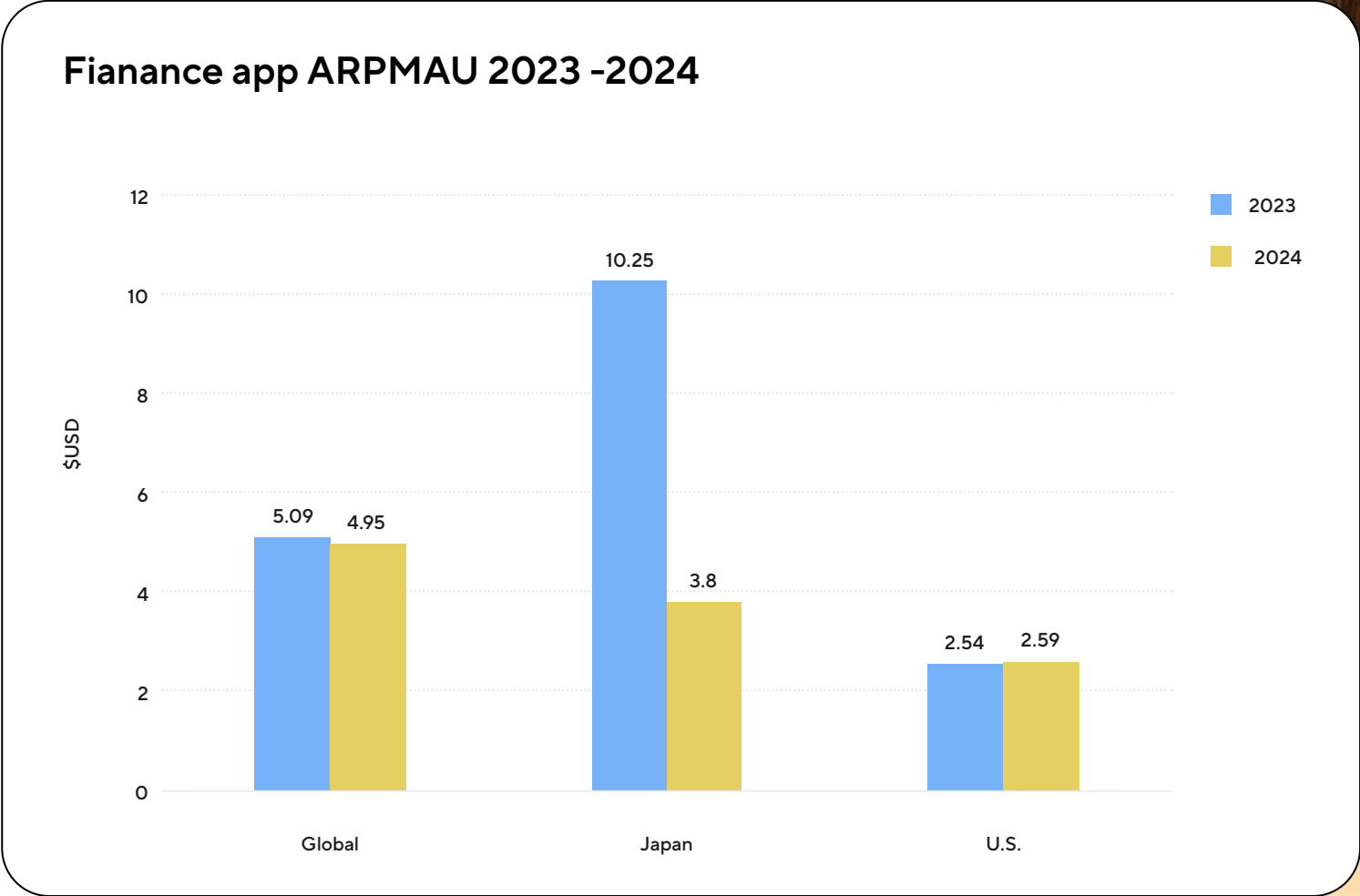


Finance app paid/organic ratio 2023 - Q1 2025 (Japan)





In 2024, Japan's ARPMAU for finance apps dropped from \$10.25 to \$3.80, marking a steep decrease from 2023's high median. Meanwhile, global ARPMAU decreased slightly from \$5.09 to \$4.95, and the U.S. saw a modest lift from \$2.54 to \$2.59.



PART 3

# Entertainment

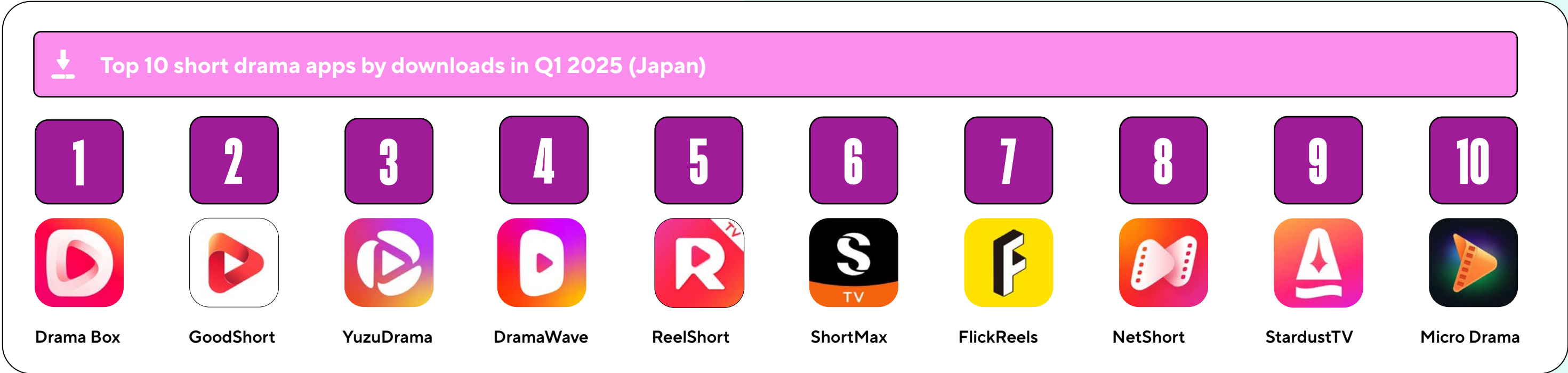


# Mobile-first entertainment and the rise of short drama and OTT apps in Japan

In 2025, Japan's mobile entertainment landscape is being reshaped by two high-engagement verticals: short drama apps and OTT streaming platforms. Both are capturing attention—and yen—from a broadening user base, thanks to shifting consumption habits, 5G adoption, and the growing role of AI in content delivery.

## SHORT DRAMA APPS: SNACKABLE STORIES, SERIOUS REVENUE

Japan’s short drama app market has evolved from niche and into a premium force in mobile entertainment. Between August 2023 and June 2024, Japanese users spent [\\$13.22 million](#) on short drama apps, accounting for 5.13% of global revenue despite making up just 2.16% of downloads. That high-value user base has pushed Japan to the second-largest market globally by revenue, with revenue per download (RPD) sitting at \$4.13—outperforming even leading mobile games.



Source:  SensorTower

This monetization efficiency reflects not only consumer willingness to pay but also a finely tuned product-market fit. Short drama apps in Japan specialize in vertical, 1–2-minute episodes, with revenge plots and emotional cliffhangers fueling snackable binge behavior—particularly among women aged 25–44. Platforms like TopShort and DramaBox standardize short-form storytelling that hooks viewers within seconds and keeps them watching via freemium models, incentivized ads, and in-app purchases. Some apps, like Teller Drama, even use AI to accelerate production and enable interactive character engagement.

These apps rely on a hybrid freemium model: the first few episodes are free, with ad views or micro-transactions unlocking additional content. Stickiness is high—DramaBox, for example, retains 17% of users at six months. Driving this retention is a combination of aggressive user acquisition (60–70% of installs are paid), addictive content, and increasingly, original Japanese storylines replacing translated Chinese dramas.

AI is playing a growing role, from voice dubbing and translation to interactive storytelling and character chats that deepen engagement. As this genre matures, Japan’s demand for high-quality, culturally resonant content will likely push the boundaries of what mobile drama can be.

Although the genre’s share of Japan’s overall streaming ecosystem was under 0.3% two years ago, it is now [growing at over 30% YoY](#). Cross-pollination with TikTok-style vertical formats, integration of AI-powered dubbing and voiceovers, and influencer-led discovery are accelerating growth. In-app ad creatives reached over 1.27 million in Q1 2025, reflecting aggressive UA. As localization deepens and loop-based episodic formats mature, short drama apps are poised to command an outsized share of mobile entertainment in Japan.



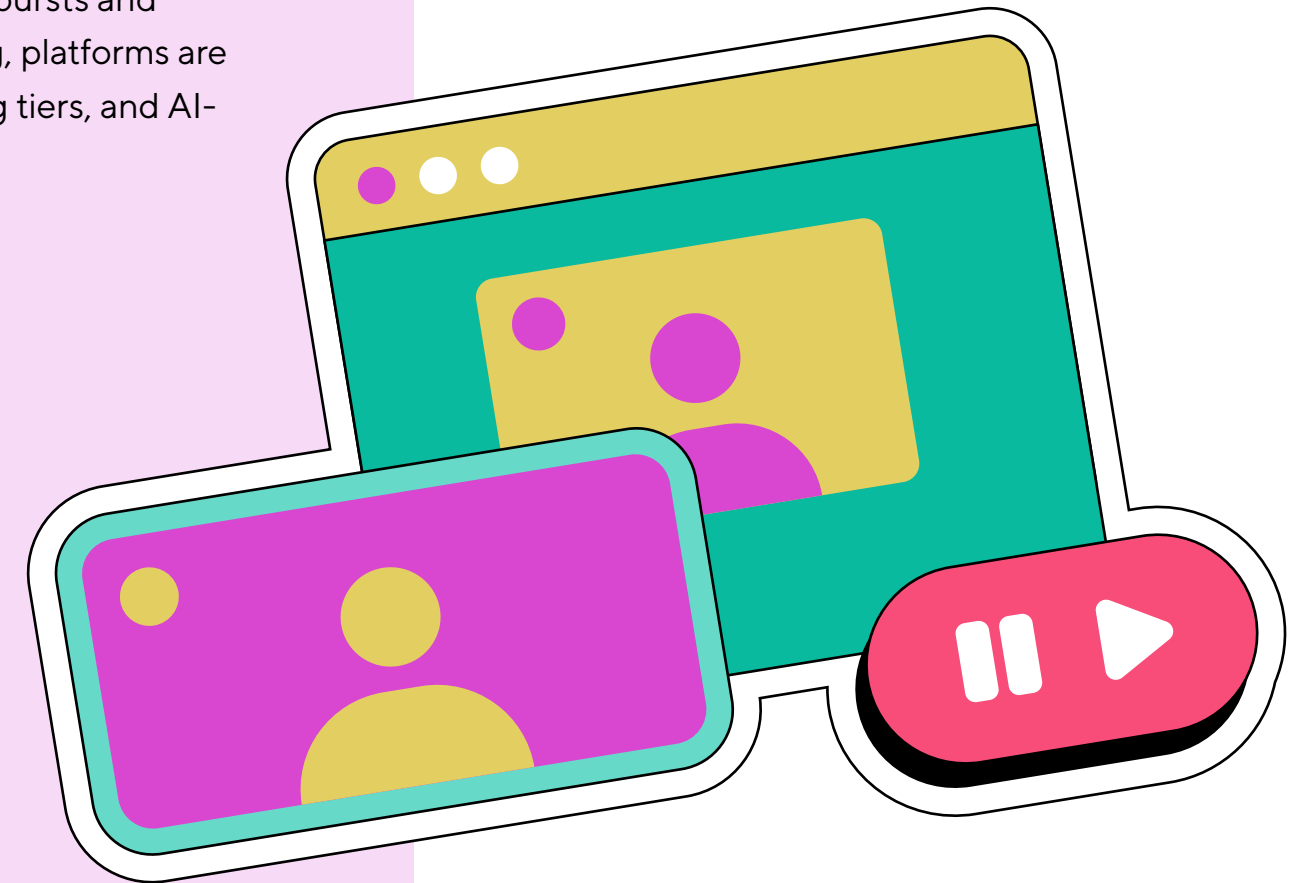


## OTT PLATFORMS: LOCALIZATION, BUNDLING, AND CTV CROSSOVER

The OTT market in Japan continues to stand out as one of the most competitive and advanced globally. Valued at [\\$9.78 billion in 2024](#), the market is projected to double by 2032, reaching \$20.18 billion with a 12.83% CAGR. Subscription video-on-demand (SVoD) alone is forecasted to grow from [\\$4 billion in 2023 to \\$5.6 billion by 2028](#), while ad-supported services are gaining traction with [22% annual growth](#). This surge is powered by nearly universal broadband access (93%) and deep mobile penetration, including 5G coverage across 95% of the population.

The [leading platforms](#)—Amazon Prime Video, Netflix, U-Next, and TVer—are employing different levers for growth. Prime Video, with 18.6 million subscribers, dominates via bundled pricing and a vast anime library. Netflix follows with 10 million paid users and strong engagement (7.3 hours/viewer quarterly), thanks to a \$2.5B investment in local content. TVer, Japan’s top AVOD platform, leads in engagement at 8.8 hours/user and captures 38% of premium VOD viewership with free, time-sensitive local TV.

Japanese viewers favor anime and domestic drama, prompting heavy investment in originals and exclusives. U-Next acquired \$815 million in J-drama rights in 2024, and hybrid monetization models are emerging—like “subscribe-to-own” and micropayments for single episodes. Mobile remains a key battleground: OTT apps are heavily optimized for smartphones, with average households [streaming on 4.3 devices](#) and consuming content in both short bursts and lean-back sessions. With price sensitivity rising, platforms are differentiating through content, flexible pricing tiers, and AI-driven personalization.



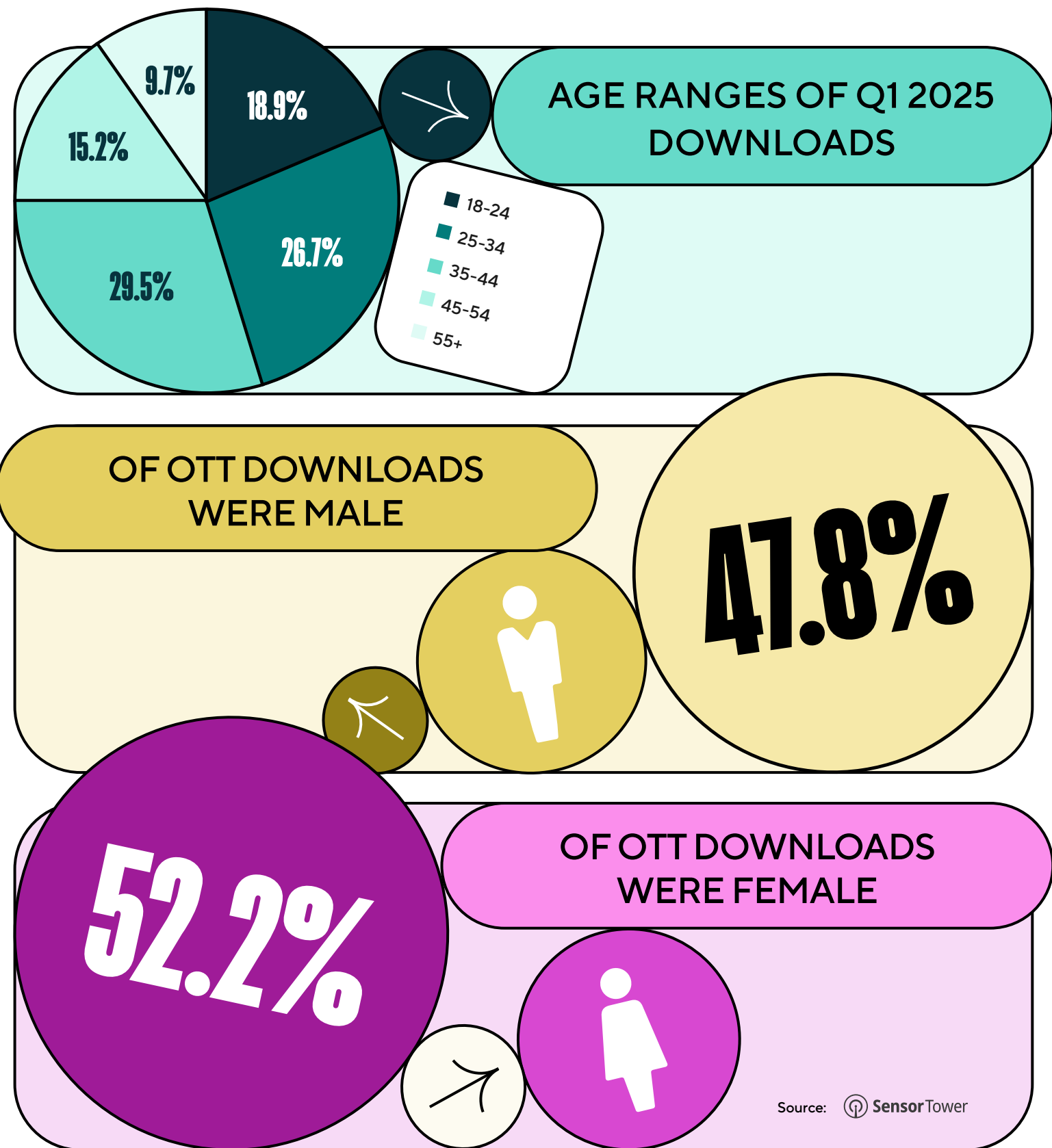
↓ Top 10 OTT apps by downloads in Q1 2025 (Japan)

1	 TVer(ティーバー) 民放公式テレビ配信サービス	
2	 Netflix	
3	 Amazon Prime Video	
4	 ABEMA(アベマ) 新しい未来のTV	
5	 U-NEXT - 映画やドラマ、アニメなどの動画が見放題	
6	 Disney+	
7	 NHKプラス	
8	 Hulu: Stream TV shows & movies	
9	 Lemino (レミノ) 映画やドラマ、アニメなどの動画が見放題	
10	 FujiTV ドラマ / 映画はFOD テレビの見逃し配信や動画が見放題!	

\$ Top 10 OTT apps by consumer spend in Q1 2025 (Japan)

 U-NEXT - 映画やドラマ、アニメなどの動画が見放題	
 ABEMA(アベマ) 新しい未来のTV	
 Hulu: Stream TV shows & movies	
 Disney+	
 FujiTV ドラマ / 映画はFOD テレビの見逃し配信や動画が見放題!	
 Amazon Prime Video	
 D Anime Store Unlimited dアニメストア アニメ動画見放題アプリ/マルチデバイス対応	
 Netflix	
 Toei 東映特撮ファンクラブ	
 Paravi (パラビ)	

Source:  SensorTower

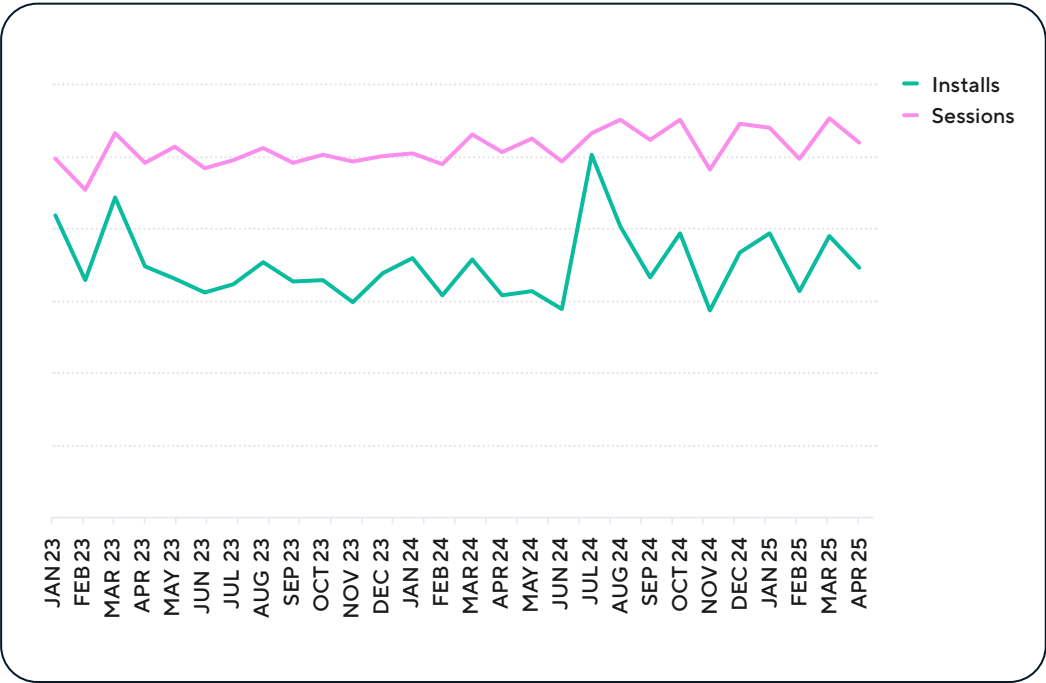


# Installs and sessions

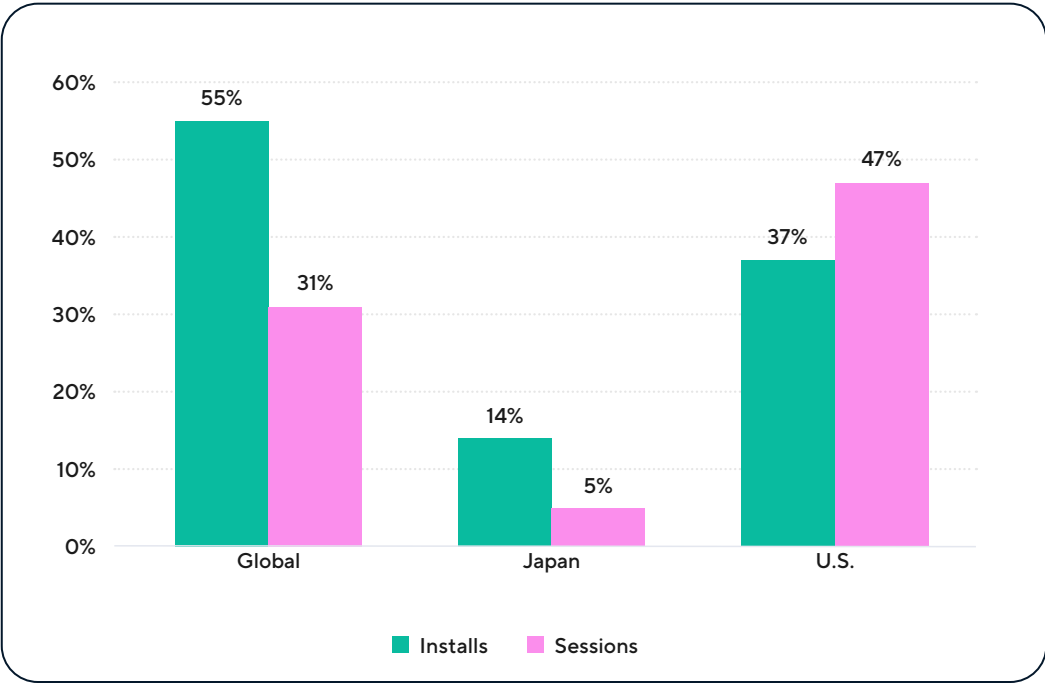
Entertainment app installs in Japan rose 2% YoY in 2024, with sessions up 5%. July saw the sharpest monthly lift at +41% over the annual average, followed by strong gains in August (+13%) and October (+10%). Session growth was steadier, peaking at +4% in both August and October.

In H1 2025, entertainment app installs in Japan surged 14% YoY, while user engagement also strengthened, reflected in a 5% increase in sessions. Growth was more pronounced globally—installs surged 55% and sessions by 31%. In the U.S., installs increased 37% alongside a 47% boost in sessions.

Entertainment app install and session growth  
January 2023 - April 2025 (Japan)



Entertainment app install and session growth  
percentages YoY H1 2025 vs. H1 2024

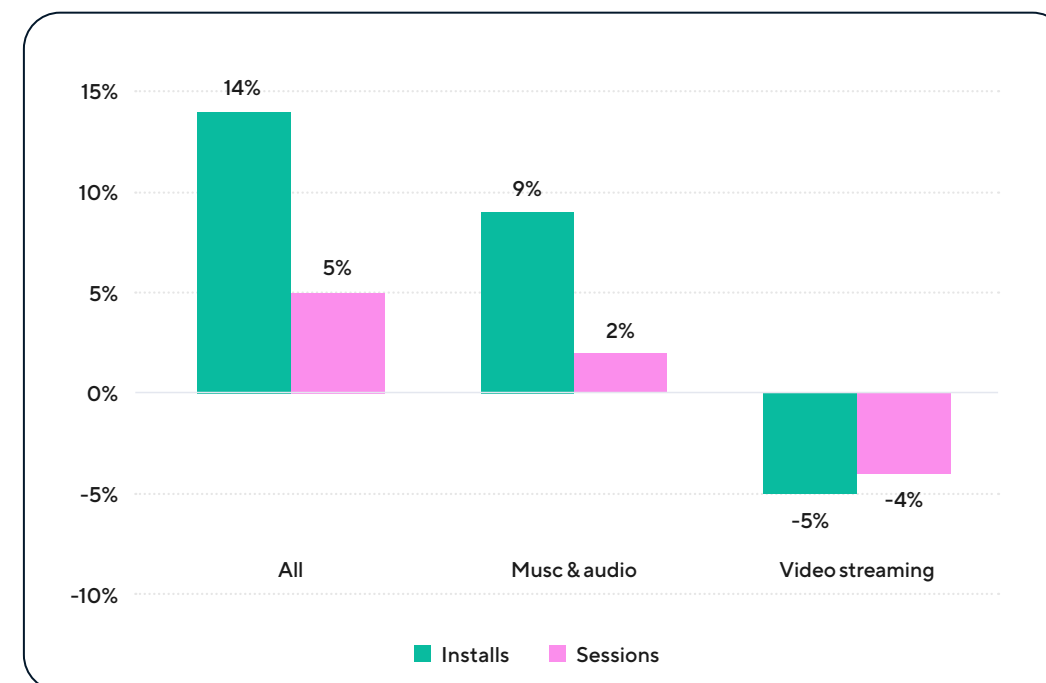




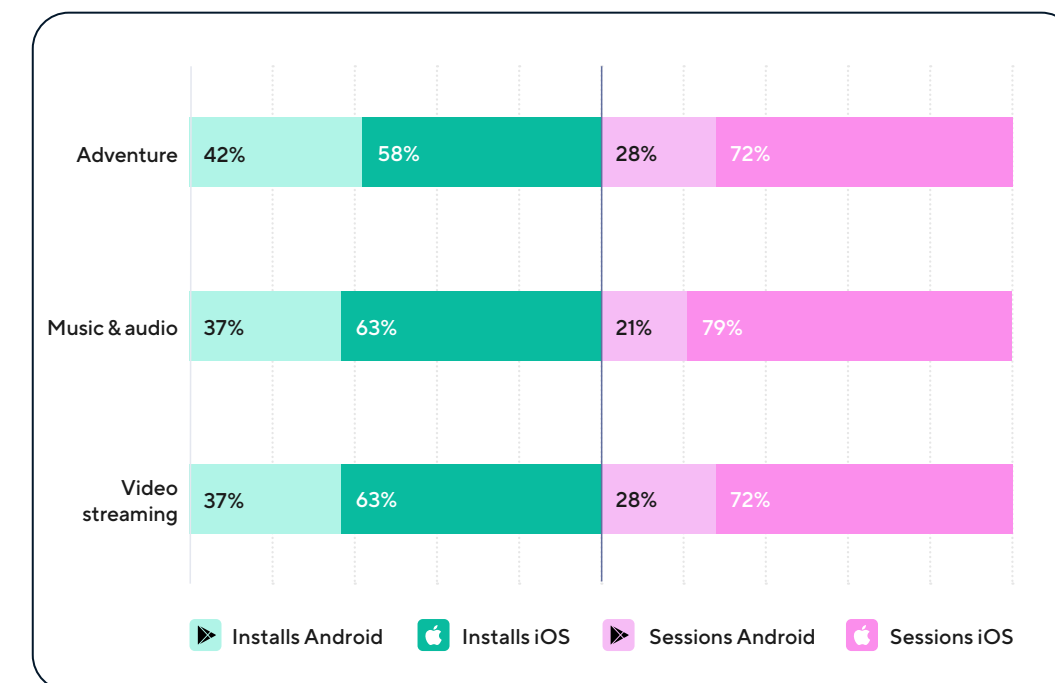
In H1 2025, installs of music & audio apps increased by 9% and sessions by 2% YoY. Despite growth in the vertical overall, video streaming apps experienced declines in both installs and sessions over the same period.

iOS continues to dominate entertainment app engagement in Japan, accounting for 72% of all sessions from 2024 to H1 2025. Music and audio apps saw an even sharper skew toward iOS, with 79% of sessions on Apple devices. While install share was more balanced, iOS still led across the board, ranging from 58% overall to 63% in both subverticals.

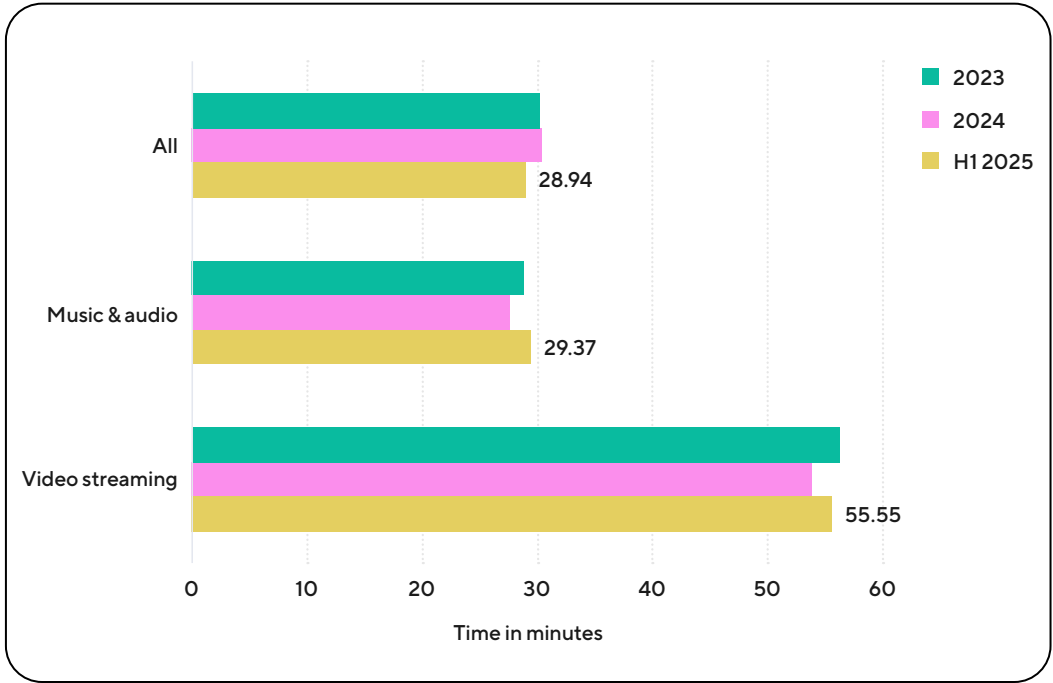
Entertainment app install and session growth percentages by subvertical YoY H1 2025 vs. H1 2024 (Japan)



Entertainment app installs and sessions by platform 2024 - H1 2025 (Japan)

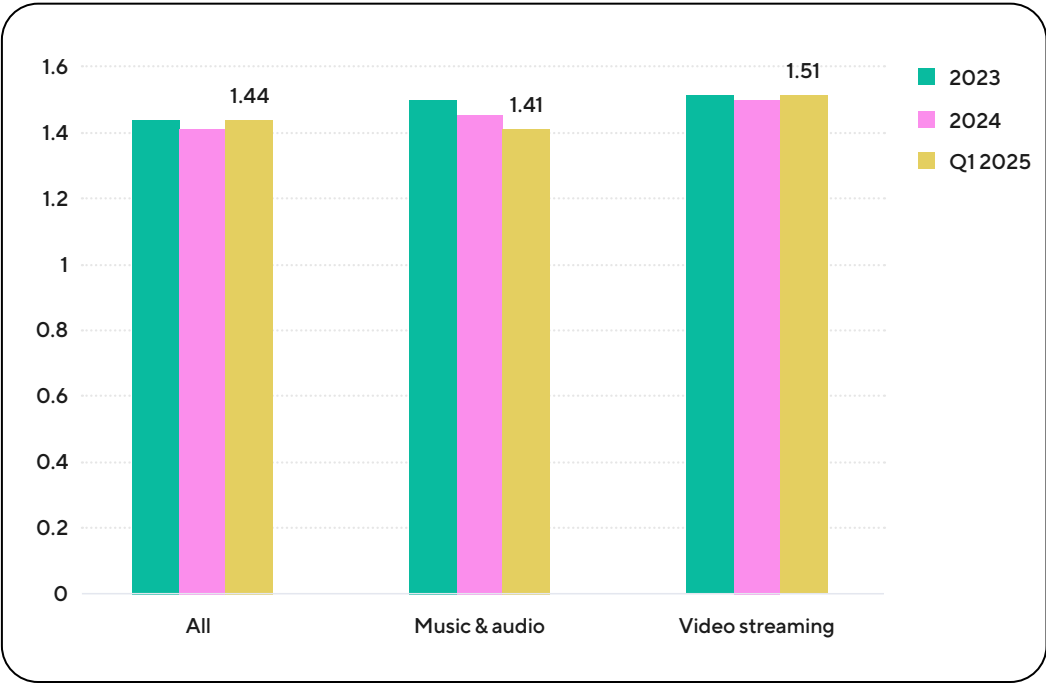


Entertainment app session lengths  
2023 - H1 2025 (Japan)



Average session lengths for entertainment apps in Japan hovered around the 29-minute mark in H1 2025, remaining consistent with (albeit a little bit lower than) previous years. Music & audio apps nudged up to 29.37 minutes, while video streaming held a strong lead at 55.55 minutes—slightly below 2023 but still ahead of 2024.

Entertainment app sessions per user per day on day 0  
2023 - Q1 2025 (Japan)



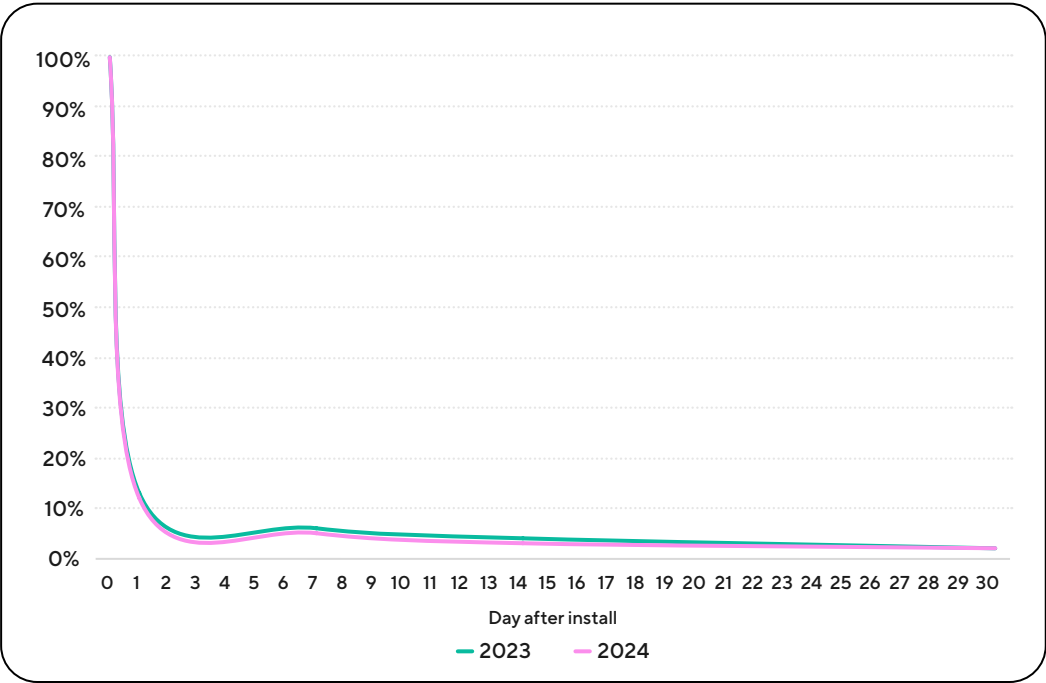
Day 0 sessions per user for entertainment apps in Japan remained consistent across the time period analyzed, averaging 1.44 in Q1 2025. Music & audio settled at 1.41, slightly lower than previous periods, while video streaming stayed unchanged at 1.51.

# Finding and keeping users

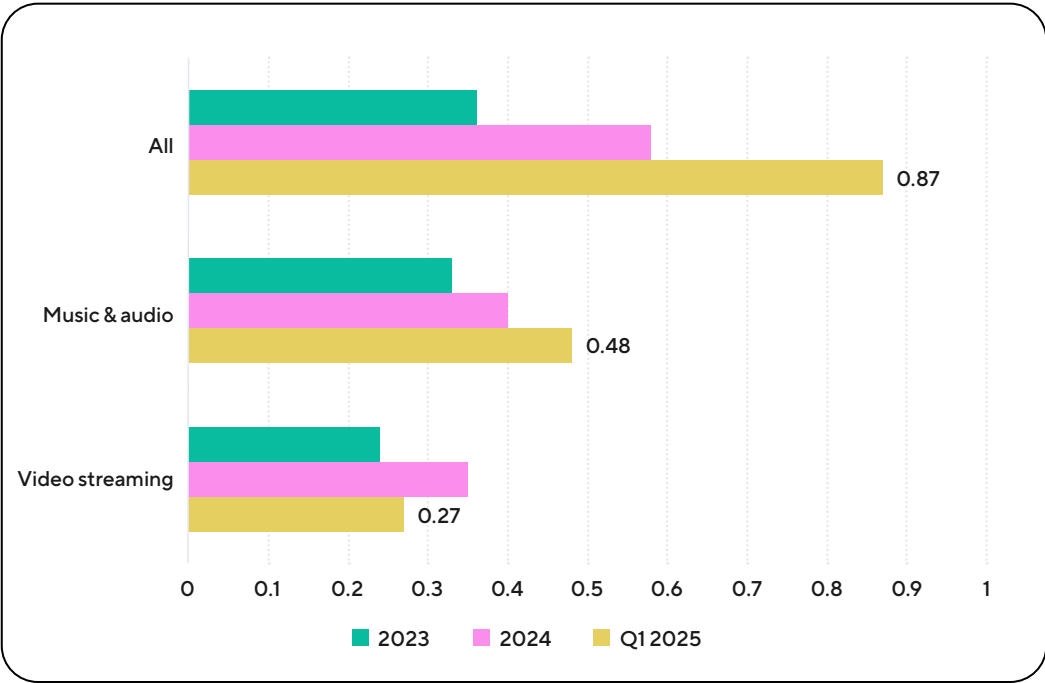
Day 1 retention for entertainment apps in Japan saw a small shift from 13% in 2023 to 12% in 2024. The one percentage point difference stayed the same by day 7 (6% vs. 5%) and day 14 (4% vs. 3%), with both years aligning at 2% by day 30.

In Q1 2025, Japan’s entertainment apps—like other app verticals in this report—leaned more heavily on paid user acquisition, with the paid/organic ratio reaching 0.87 overall. Music & audio apps showed the most consistent growth in this metric across the three periods, rising to 0.48. Video streaming’s ratio was the only one to decline in favor of organic installs, ending at 0.27—closer to 2023 levels than 2024.

Entertainment app retention rates 2023 - 2024 (Japan)

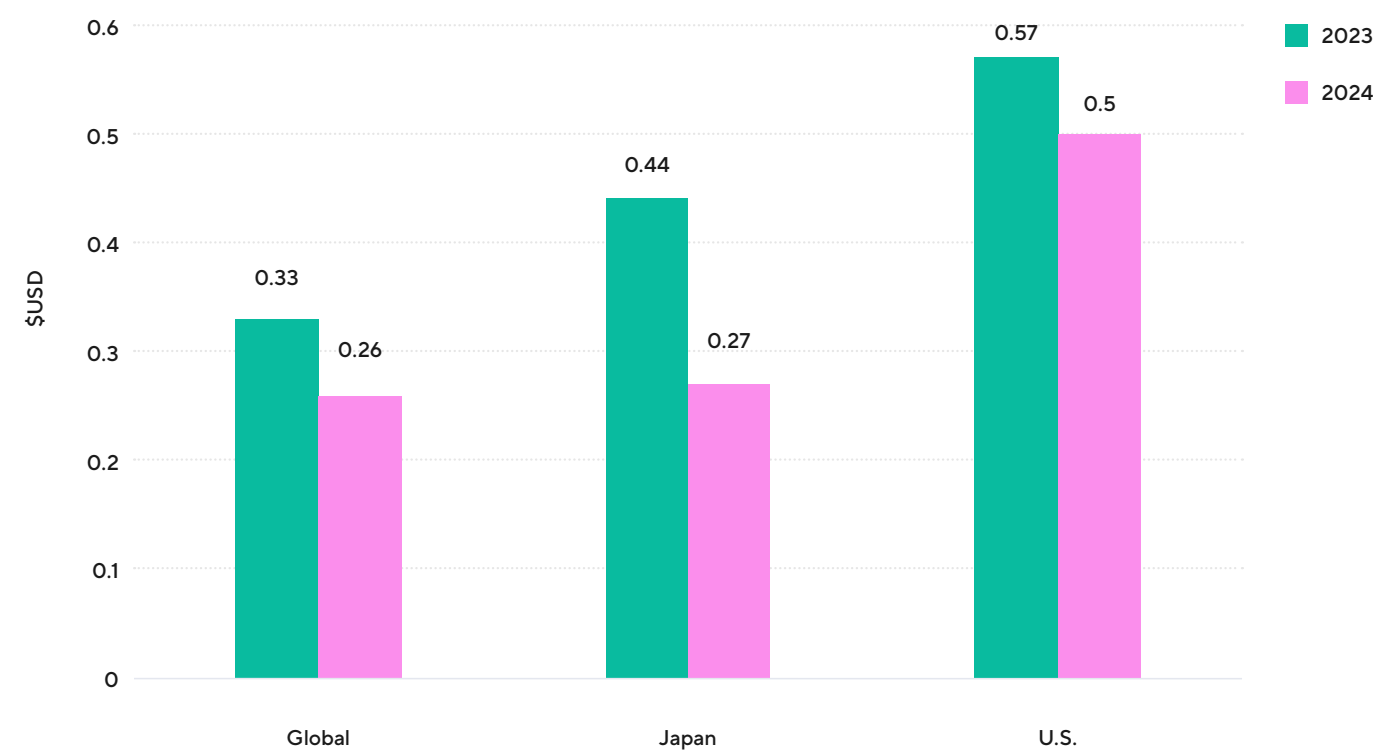


Entertainment app paid/organic ratio 2023 - Q1 2025 (Japan)



Entertainment app ARPMAU in Japan dipped from \$0.44 in 2023 to \$0.27 in 2024, bringing it closer to the global median of \$0.26. While the U.S. continued to lead with \$0.5, it also saw a decrease from \$0.57.

Entertainment app ARPMAU 2023 -2024





PART 4

# Comics



Japan’s comic app ecosystem is one of the largest in the world, built on the country’s deep cultural affinity for manga and mobile content consumption. Platforms like [Piccoma](#), [LINE Manga](#), and [Mecha Comic](#) serve millions of users with a mix of classic titles, exclusive serializations, and mobile-optimized webtoons. While Adjust data shows that overall growth slowed in 2024, Japan remains a revenue powerhouse, with a loyal user base and high monetization through chapter-based purchases, subscriptions, and timed “free unlock” models.

What defines this market now isn’t rapid expansion, but depth of engagement. The vertical scroll format and episodic structure keep readers coming back daily, while AI is quietly enhancing production, localization, and personalized recommendations. In a saturated entertainment landscape, comic apps in Japan continue to convert cultural passion into reliable mobile revenue.

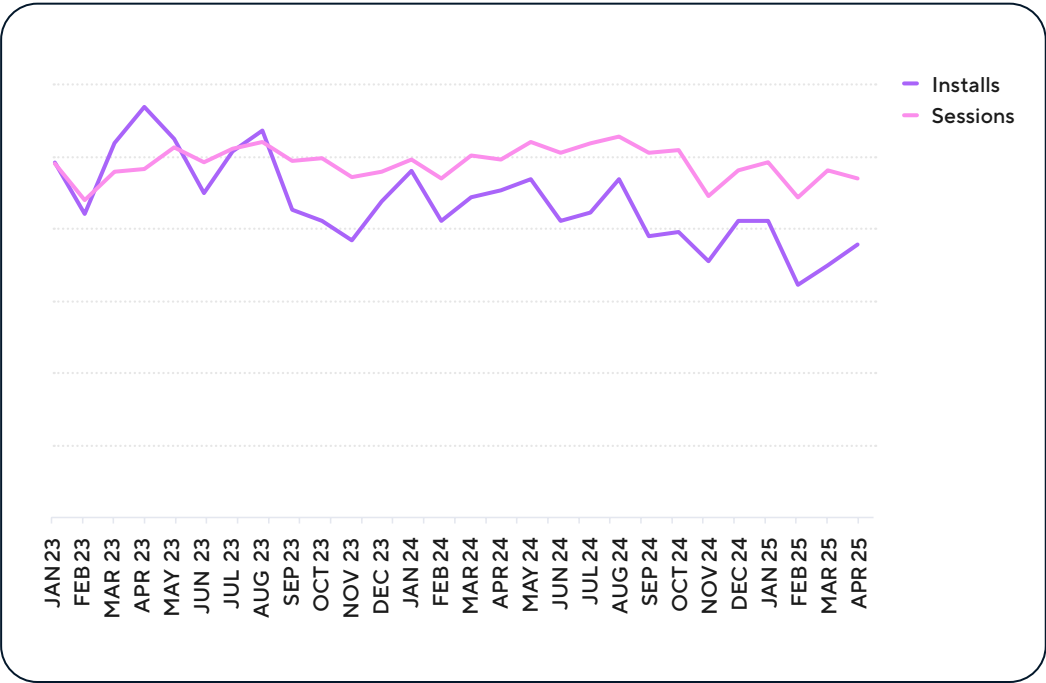


# Installs and sessions

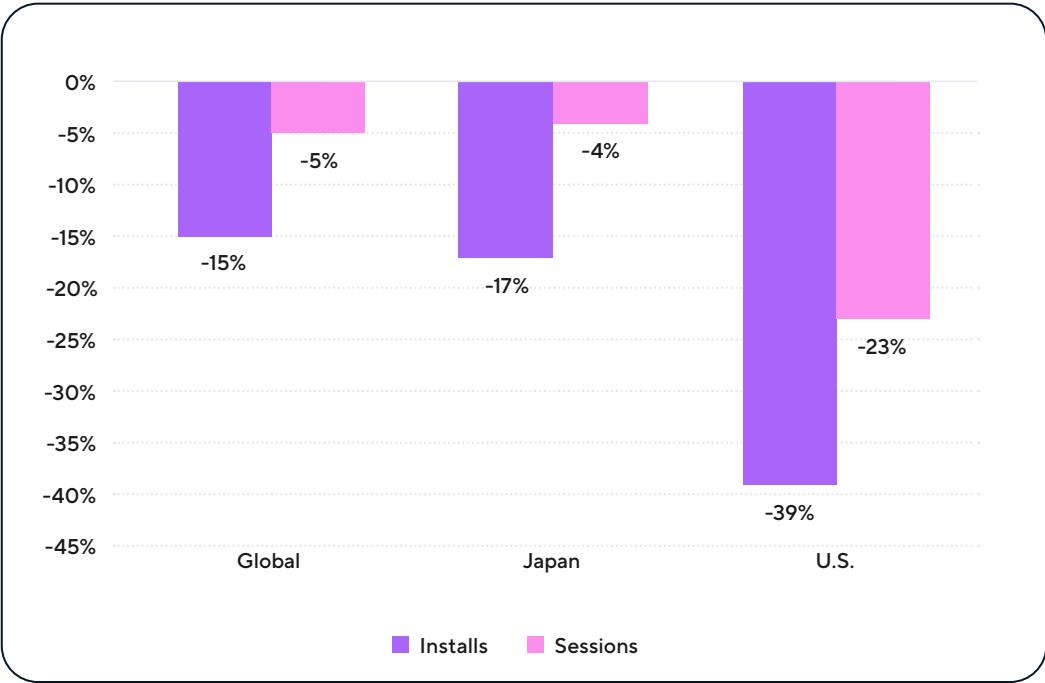
Comic app performance in Japan was steady in 2024, with installs trending downward throughout most of the year. Installs peaked at +11% in January and saw additional momentum in April, May, and August (+8%). Sessions steadily improved across the second half of the year, resulting in a 2% YoY increase.

Comic apps experienced a global downturn in H1 2025, with installs falling 15% and sessions dipping 5% YoY. Japan followed a similar trend, with a 17% drop in installs and a more modest 4% decline in sessions. The U.S. saw the sharpest decrease, particularly in installs, which dropped 39%, alongside a 23% session decline. Things are starting to improve, however, with installs in April up 6% compared to the H1 average.

Comic app install and session growth  
January 2023 - April 2025 (Japan)



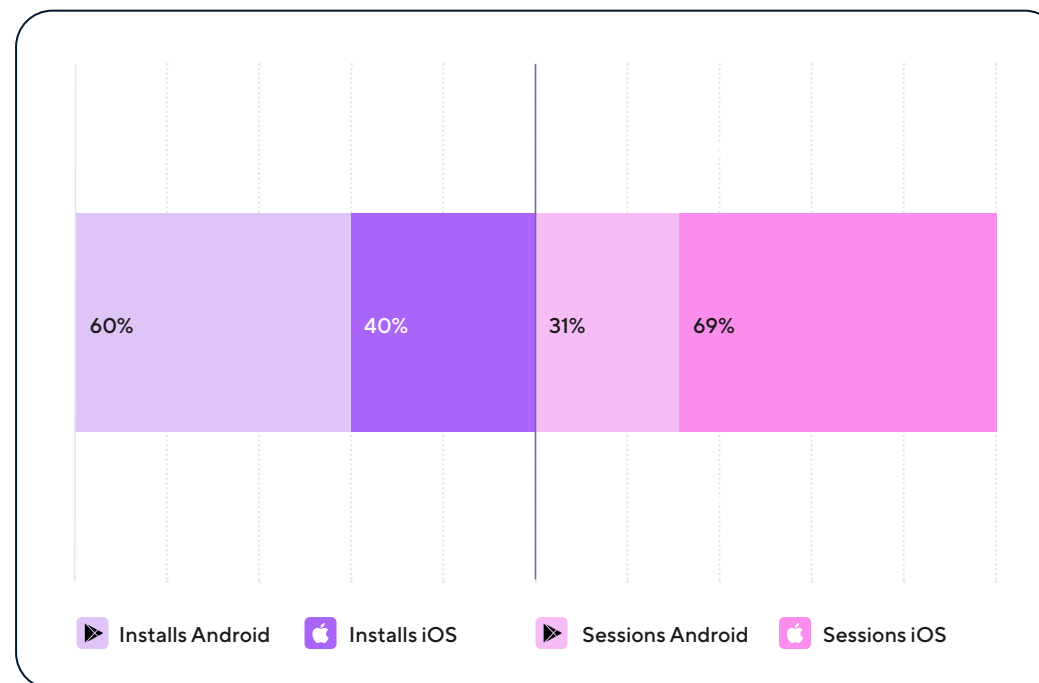
Comic app install and session growth  
percentages YoY H1 2025 vs. H1 2024



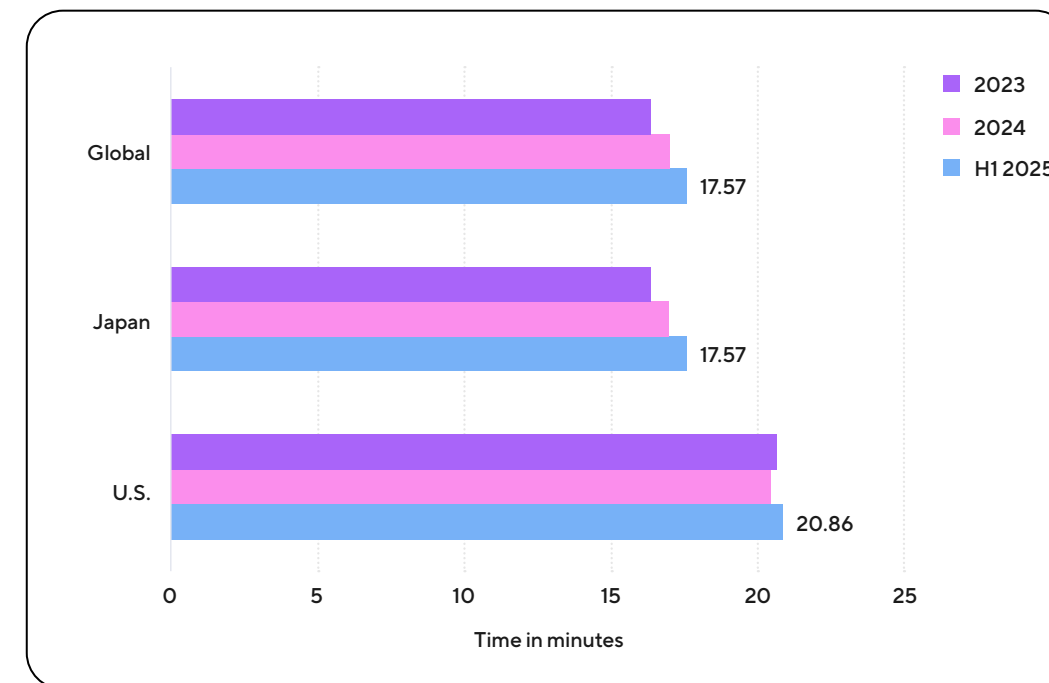
In Japan, comic apps—unlike most other verticals—saw a higher share of installs on Android (60%) compared to iOS (40%) from 2024 to H1 2025. However, iOS users were more active, generating 69% of all sessions, while Android contributed 31%.

Engagement time in comic apps continued to trend upward in H1 2025. Average session lengths reached 17.57 minutes in both Japan and globally, reflecting steady YoY growth. In the U.S., users spent 20.86 minutes per session, holding its position as the region with the longest average session duration among the markets analyzed.

Comic app installs and sessions by platform 2024 - H1 2025 (Japan)

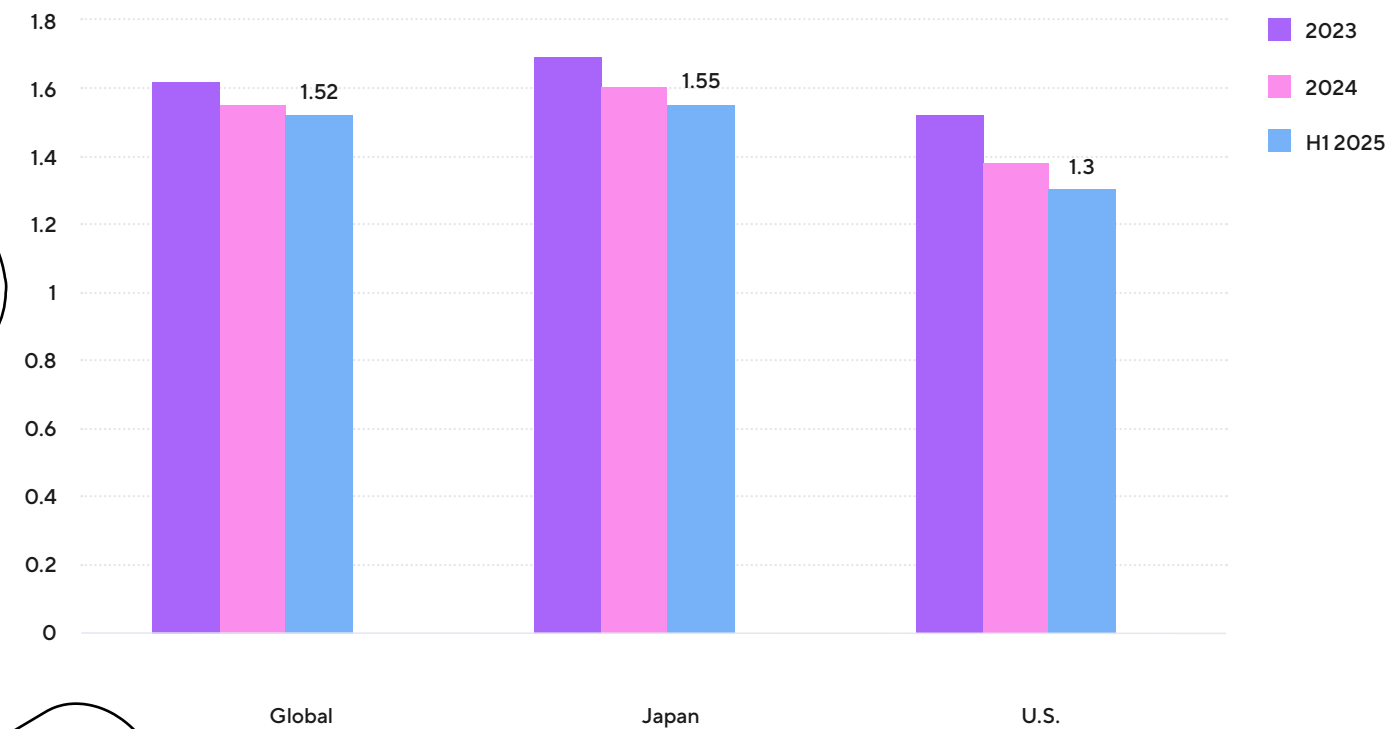


Comic app session lengths 2023 - H1 2025



In Q1 2025, the median day 0 sessions per user for comic apps declined across all regions. Japan maintained the highest level at 1.55, followed by global at 1.52. The U.S. saw the lowest amount of engagement at 1.3 sessions per user.

Comic app sessions per user per day on day 0 2023 - Q1 2025 (Japan)



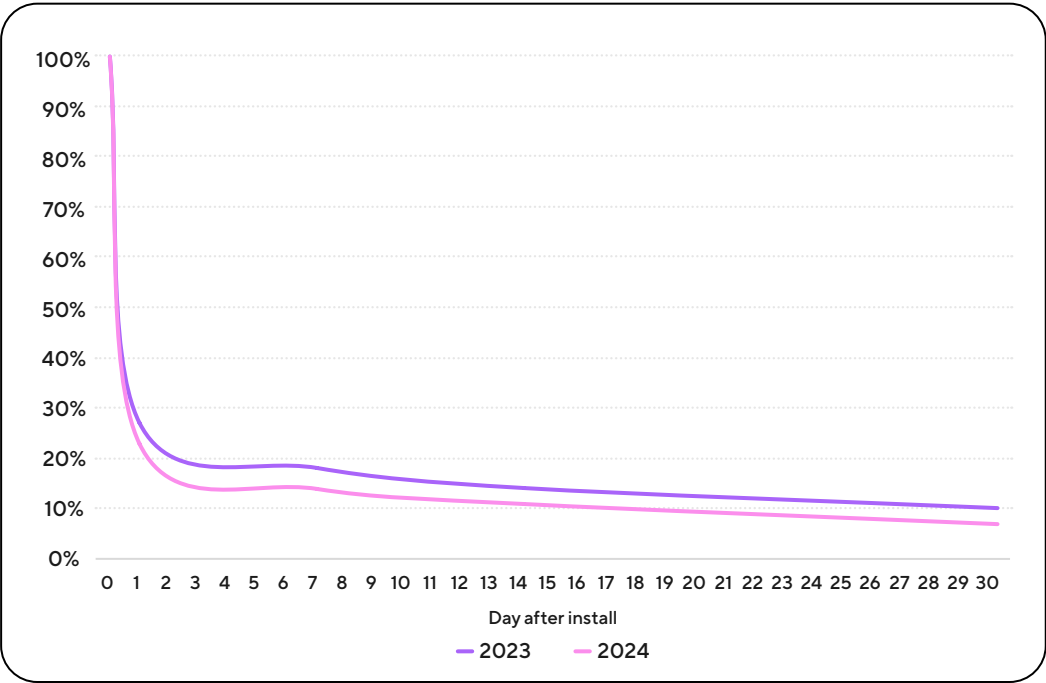


# Finding and keeping users

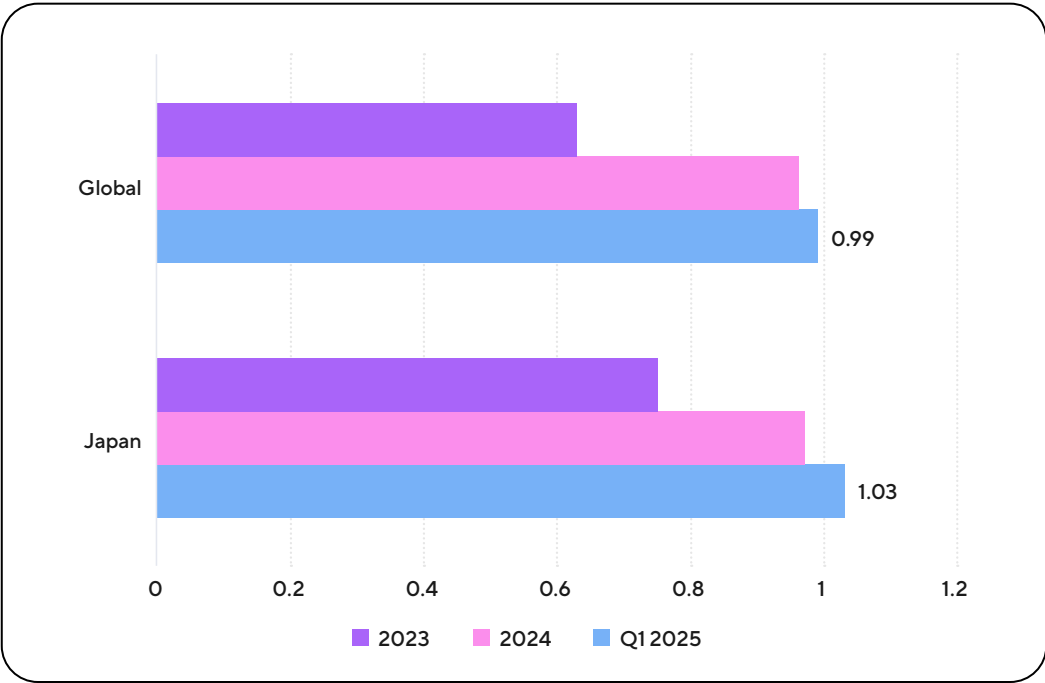
Comic app retention in Japan saw a dip in 2024, with day 1 rates falling from 27% to 23% and day 30 retention down to 7% from 10% in 2023. The gap between early interest and lasting engagement widened slightly, underscoring the importance of optimizing the user journey to avoid churn throughout the first 14-30 days post-install.

The balance between paid and organic user acquisition continued to shift in Q1 2025. Japan reached a ratio of 1.03—its highest yet—while the global median climbed to 0.99. With both regions progressing from sub-1.0 levels in 2023, the data reflects a growing emphasis on paid media to drive comic app installs.

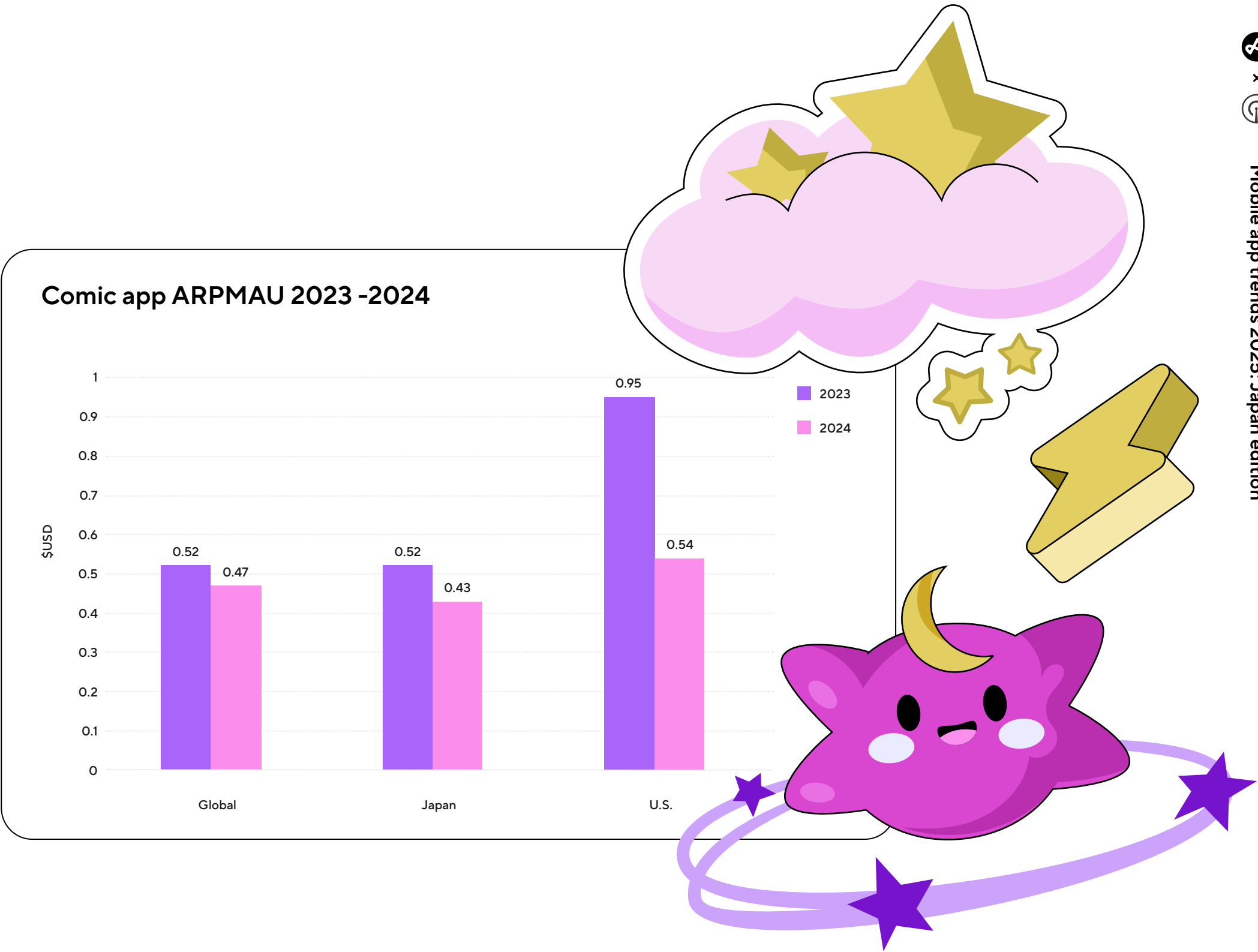
Comic app retention rates 2023 -2024 (Japan)



Comic app paid/organic ratio 2023 - Q1 2025



A YoY dip in ARPMAU suggests tightening of user spend in the comic app space. The Japan and global medians fell to \$0.43 and \$0.47, respectively, while the U.S. experienced a sharper drop, down from \$0.95 to \$0.54. This highlights shifts in user spend and possible pricing or content strategy adjustments.





## ABOUT ADJUST

Adjust, an AppLovin (NASDAQ: APP) company, is trusted by marketers around the world to measure and grow their apps across platforms. Adjust works with companies at every stage of the app marketing journey, from fast-growing digital brands to brick-and-mortar companies launching their first apps. Adjust's powerful measurement and AI-powered analytics solutions provide visibility and insights, while deep linking and engagement solutions help to drive ROI.

[adjust.com](https://adjust.com)



[adjust.com](https://adjust.com)



[@adjustcom](https://twitter.com/adjustcom)



## ABOUT SENSOR TOWER

Sensor Tower cultivates rich market insights into the trends shaping businesses in the global digital economy. Our data scientists and algorithms process trillions of aggregated data points that people contribute to us from millions of devices, making up our one-of-a-kind data estate.

We augment our customers' market understanding with industry benchmarks, leaderboards and by identifying disruptive shifts, invisible in their enterprise data. Data analysts discover opportunities for optimization through on-demand primary research in our cloud platform or their favorite data science tools. Business leaders rely on our signature reports to inform their growth strategies.

We are obsessed with the pursuit of superior data quality and ensuring universal customer success.

[sensortower.com](https://sensortower.com)



[sensor-tower](https://sensortower.com)



[@SensorTower](https://twitter.com/SensorTower)