

# Asia-Pacific vs. North America: Regional Behaviour Study

Usage Patterns, Feature Preferences, and Monetisation Behaviour Across 8 Markets — 2,400-User Cross-Regional Study

## EXECUTIVE SUMMARY

This cross-regional study compares AI companion usage patterns, feature preferences, session timing, and monetisation behaviour between Asia-Pacific and North American user cohorts. Analysis is based on 1,200 users per region drawn from platform analytics and a supplemental 800-respondent survey. Key findings include Japan's 35% daily engagement rate (the highest globally), North America's ARPU lead at \$54.80/month, and significant regional divergence in feature adoption and peak usage hours.

## DAILY ENGAGEMENT BY REGION

Daily active user rates vary substantially across markets, reflecting cultural normalisation differences and product feature availability.

- **Japan: 35% of registered users engage daily — highest globally**
- **South Korea: 31% daily engagement**
- **Australia: 28% daily engagement**
- **United States: 26% daily engagement**
- **Canada: 24% daily engagement**
- **United Kingdom: 22% daily engagement**
- **India: 19% daily engagement**
- **Philippines: 22% daily engagement**

Japan's lead is consistent with the country's broader history of AI companion and virtual relationship media normalisation. The gap between Japan (35%) and the US (26%) is significant and has been stable across three quarters of tracking.

## SESSION TIMING: PEAK HOURS

Peak session hours diverge meaningfully between regions, with implications for real-time feature delivery and server capacity planning.

- **Asia-Pacific peak: 10:00 PM – 1:00 AM local time (consistent across Japan, South Korea, Australia)**
- **North America peak: 8:00 PM – 10:00 PM local time (consistent across US and Canada)**

In both regions, approximately 35% of all daily sessions occur within a two-hour peak window. The later Asia-Pacific peak may reflect later working hours and higher rates of urban single-occupancy households in major cities.

## FEATURE ADOPTION: VOICE VS. TEXT

Voice interaction has been adopted at significantly higher rates in Asia-Pacific than North America, a trend that first emerged in Q3 2024 and has accelerated since.

- **Asia-Pacific users with voice chat enabled: 61%**
- **North America users with voice chat enabled: 44%**
- **Asia-Pacific voice session proportion of total sessions: 38%**
- **North America voice session proportion of total sessions: 24%**

Asia-Pacific voice sessions are also longer on average (34 minutes versus 26 minutes in North America), suggesting deeper engagement with the audio modality. This has informed accelerated voice feature investment for APAC-localised builds.

## MONETISATION AND ARPU

North America leads on average revenue per user despite lower daily engagement rates than Japan and South Korea. This reflects purchasing power differences and price sensitivity rather than satisfaction gaps.

- **North America ARPU: \$54.80/month**
- **Australia ARPU: \$48.20/month**
- **Japan ARPU: \$41.50/month (strong purchasing power but lower willingness to pay for AI intimacy)**
- **South Korea ARPU: \$38.90/month**
- **India ARPU: \$9.40/month (driven by large free-tier user base)**

- **Philippines ARPU: \$11.20/month**

Free-to-premium conversion rates are highest in Japan (31%) and South Korea (28%), despite lower ARPU, indicating strong product-market fit with a more price-sensitive premium tier.

### CULTURAL ATTITUDES AND OPENNESS

Survey data on openness to AI companionship reveals the cultural factors behind adoption rates. Respondents were asked whether they considered AI companion use socially acceptable in their community.

- **Japan: 68% agree it is socially acceptable**
- **South Korea: 54% agree**
- **Australia: 42% agree**
- **United States: 38% agree**
- **United Kingdom: 31% agree**
- **Canada: 35% agree**
- **India: 29% agree**

Cultural acceptance correlates strongly with daily engagement rates, reinforcing that adoption barriers in Western markets are primarily social rather than technological or economic.

### DATA TABLE

Market	Daily Engagement	ARPU/Month	Voice Adoption
Japan	35%	\$41.50	61%
South Korea	31%	\$38.90	58%
Australia	28%	\$48.20	49%
United States	26%	\$54.80	44%
Canada	24%	\$51.20	41%
United Kingdom	22%	\$46.10	38%
Philippines	22%	\$11.20	33%
India	19%	\$9.40	27%

### METHODOLOGY

Platform analytics drawn from anonymised server logs across 1,200 users per region (Asia-Pacific: Japan 400, South Korea 300, Australia 250, Philippines 250; North America: US 700, Canada 300, UK 200). Analytics period: January 1–July 31, 2025. Supplemental survey of 800 respondents (400 per region) conducted July 2025 via in-platform opt-in. ARPU figures from billing system, restricted to users active for a minimum of 60 days. Exchange rates fixed to July 1, 2025 mid-market rates.

#### Disclosure

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