

# The Media Environment Today

## Fixed-point Media Survey (Tokyo)

●  
2014

Hakuhodo DY Media Partners  
Institute of Media Environment

June 2014



INSTITUTE OF MEDIA ENVIRONMENT  
メディア環境研究所

- Purpose: Take a fixed-point measurement (overview) of existing as well as newly emerging media channels within our ever-changing media environment with the purpose of discovering trends in the market structure
- Survey area: Tokyo, Osaka, Aichi, and Kochi prefectures
- Subjects: Males and females age 15–69
- Survey method: Survey by post
- Sampling method: Random Digit Dialing (RDD)
- Sample configuration: 2567 samples in four areas total (634 from Tokyo, 645 from Osaka, 653 from Aichi, 635 from Kochi)

*Age and gender groups weighted according to the FY2013 Basic Resident Register*

- Survey period: Friday, January 24, 2014 through Thursday, February 6
- Conducted by: Video Research Ltd.

# Sample configuration (Tokyo area)

	Age	Surveys issued	Surveys returned	Weighting
<u>Males</u>	15–19	63	57	59
	20–29	63	56	183
	30–39	62	48	241
	40–49	62	52	239
	50–59	60	51	167
	60–69	60	49	173
<u>Females</u>	15–19	62	56	56
	20–29	62	52	177
	30–39	60	53	228
	40–49	60	53	226
	50–59	60	52	159
	60–69	60	55	179
Totals		734	634	2086

1. Media contact times
2. Media reputation
3. Use of media services
4. Use of digital devices
5. Media interaction patterns
6. Social media

# Survey results

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(Tokyo area)

- **Most time spent interacting with TV followed by mobile phones and smartphones (pg. 11)**

*Sei-katsu-sha* spend 156.9 minutes watching television, 74.0 minutes using mobile phones and smartphones, and 69.1 minutes using computers each day. Mobile and smartphone use has exceeded computer use.

- **Tablet ownership tops 20% for the first time (pg. 61)**

Tablet ownership has hit 20.9% in the Tokyo area, and is particularly high (over 30%) among men in their 30s and 40s. The most common applications are web searches (83.9%), watching video (51.2%), and watching the news (50.8%).

- **Over half of females aged 15–19 interact with social media while watching TV (pg. 71)**

Among female teenagers in particular, writing or reading social network posts on a given program while watching it on TV has become a daily part of life.

1. Media contact times

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# Important note regarding 2014 Survey

In the past, our Fixed-point Media Surveys asked about “internet contact time” in terms of whether users got online via computer or via mobile phone.

In recent years, however, the spread of smartphones and tablets has made the definition of “internet” more complex with apps, social media, interactive gaming and so on.

Since sei-katsu-sha may have difficulty defining what “internet” means in this complex online environment, 2014 survey items have been revised as follows:

(Through 2013) Internet via computer → (Starting in 2014) Computer

(Through 2013) Internet via mobile phone → (Starting in 2014) Mobile phone/smartphone

Please keep the above changes in mind when interpreting time-series graphs showing media contact times.

Note also that we have added tablets to our list of six primary media touchpoints (TV, radio, newspapers, magazines, computers, mobile phones/smartphones).



# Q. How much do you use/watch/listen to the following types of information media on a typical day?

- TV
- Radio
- Newspaper  
(Morning and evening edition combined)
- Magazines
- Computer
- Tablet
- Mobile phone  
(Including smartphone)

×

Weekday (M–F)  
Saturday/Sunday

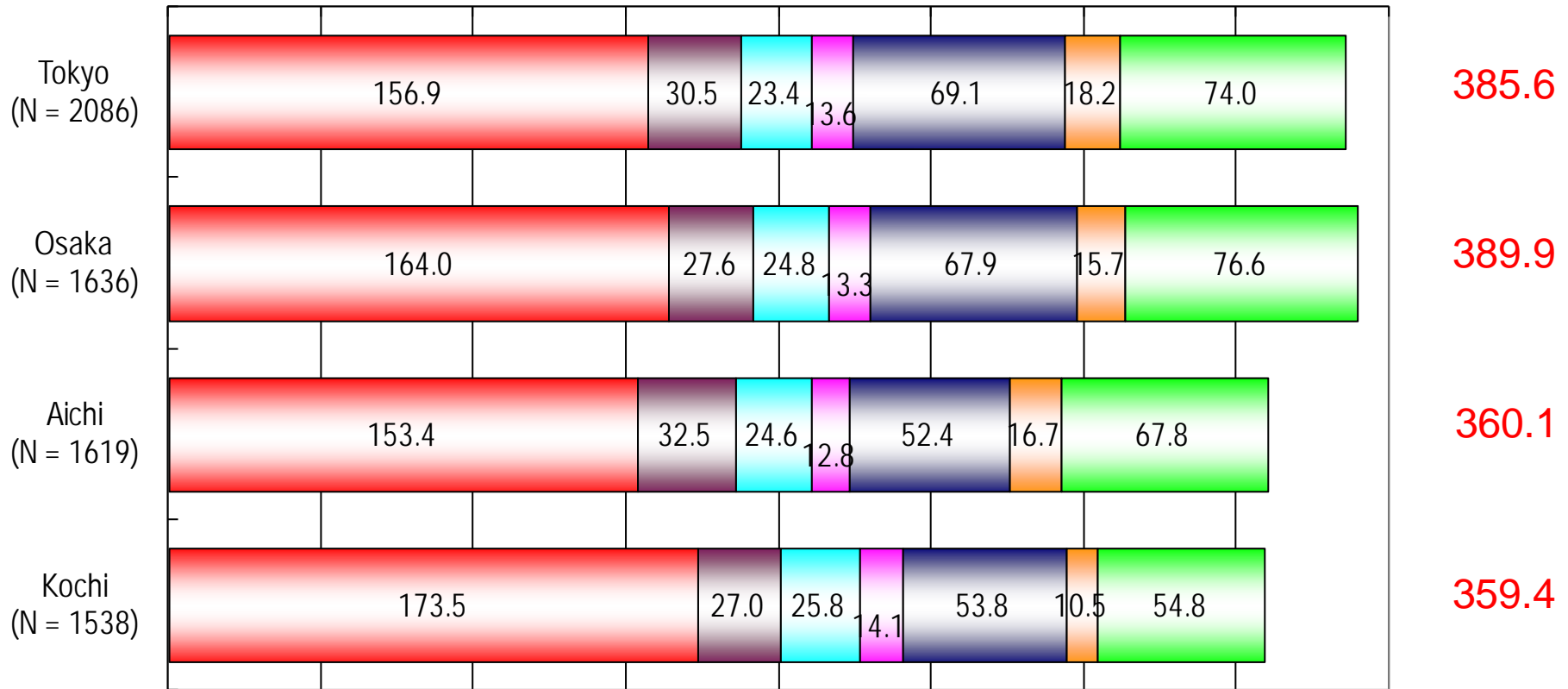
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- Less than 10 minutes
- 10–20 minutes
- 20–30 minutes
- 30–40 minutes
- 40–45 minutes
- 50–60 minutes
- 1–1.5 hours
- 1.5–2 hours
- 2–3 hours
- 3–4 hours
- 4–5 hours
- 5 hours or more
- Not at all

# Daily media contact times

Weekly averages

0min 50min 100min 150min 200min 250min 300min 350min 400min

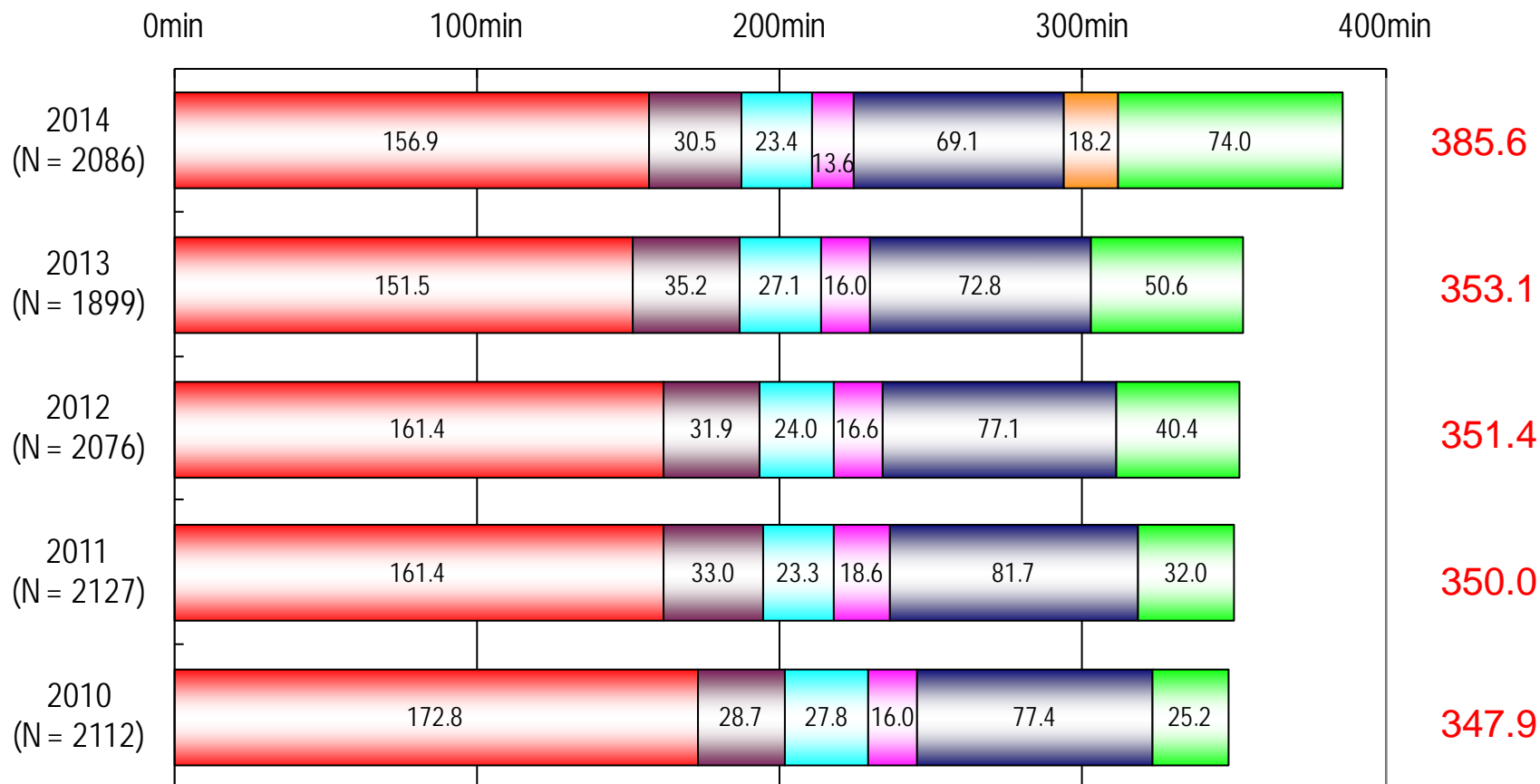


■ TV ■ Radio ■ Newspapers ■ Magazines ■ Computers ■ Tablets ■ Mobile phones/smartphones

Note: Tablet figures added in 2014

(Tokyo area)

# Change in media contact over time



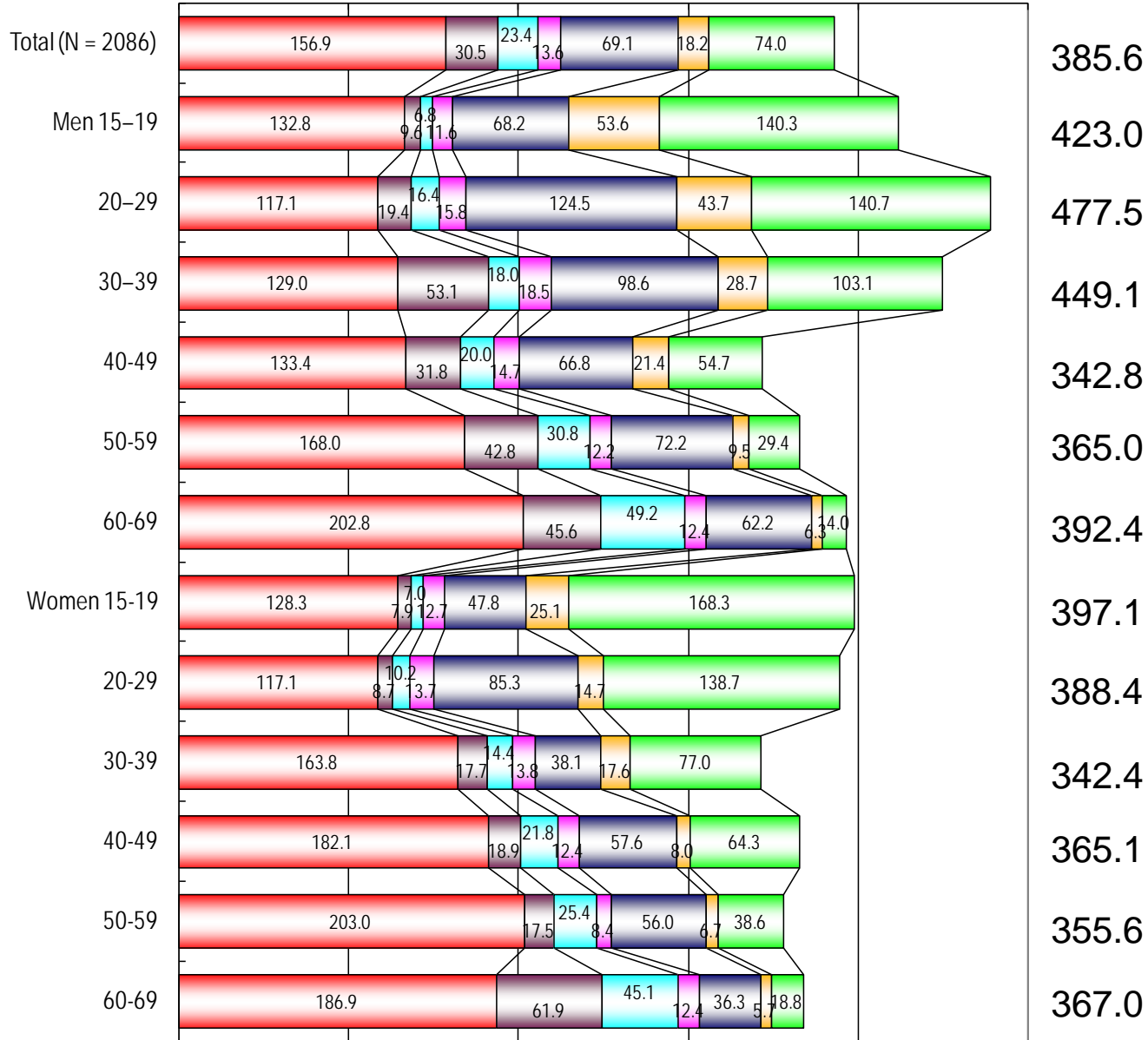
**Note:**

- Tablet figures added in 2014
- Internet access via computer has been changed to “computers”, while internet access via mobile phone or smartphone has been changed to “mobile phone/smartphones”

(Tokyo area)

# Daily media contact times by gender and age group

0min 100min 200min 300min 400min 500min



Note: Tablet figures added in 2014



1. Media contact times

2. Media reputation

3. Use of media services

4. Use of digital devices

5. Media interaction patterns

6. Social media

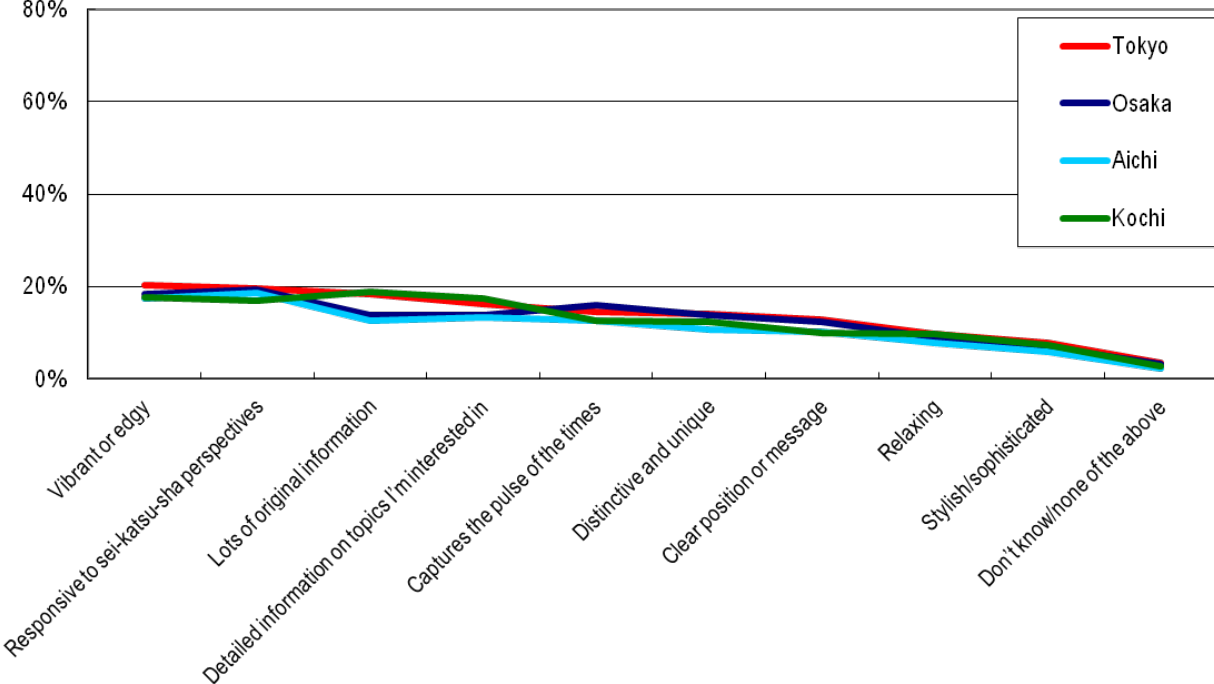
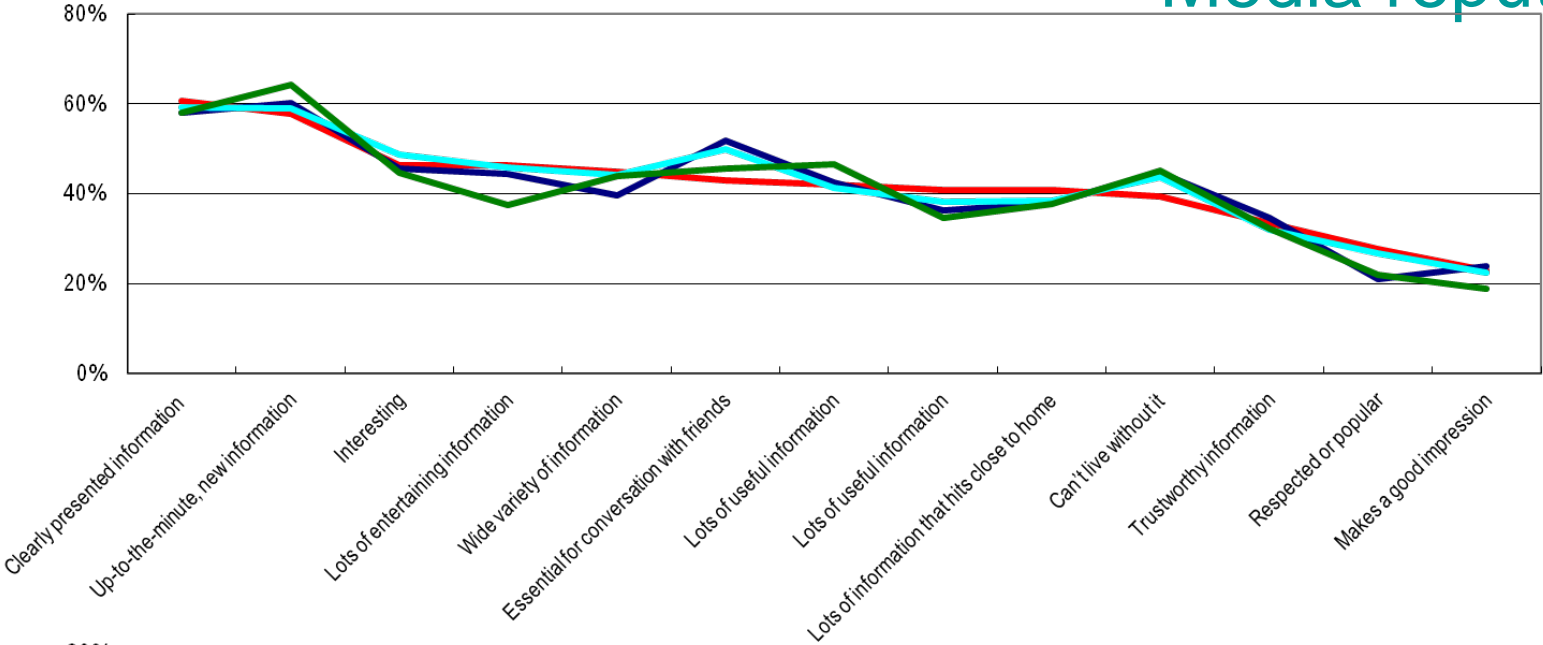
# Q. Which of these statements describe your opinion about the following types of information media?

**TV Radio Newspaper Magazines Computers Mobile phones/smartphones**

*Note: Internet access via computer has been changed to “computers”, while internet access via mobile phone or smartphone has been changed to “mobile phone/smartphones”*

1. Trustworthy information
2. Up-to-the-minute, new information
3. Wide variety of information
4. Clearly presented information
5. Detailed information on topics I'm interested in
6. Lots of original information
7. Lots of information that hits close to home
8. Engaging or exciting information
9. Lots of useful information
10. Lots of entertaining information
11. Relaxing
12. Can't live without it
13. Essential for conversations with friends
14. Interesting
15. Clear position or message
16. Distinctive and unique
17. Respected or popular
18. Stylish/sophisticated
19. Vibrant or edgy
20. Captures the pulse of the times
21. Responsive to sei-katsu-sha perspectives
22. Makes a good impression
23. Don't know/none of the above

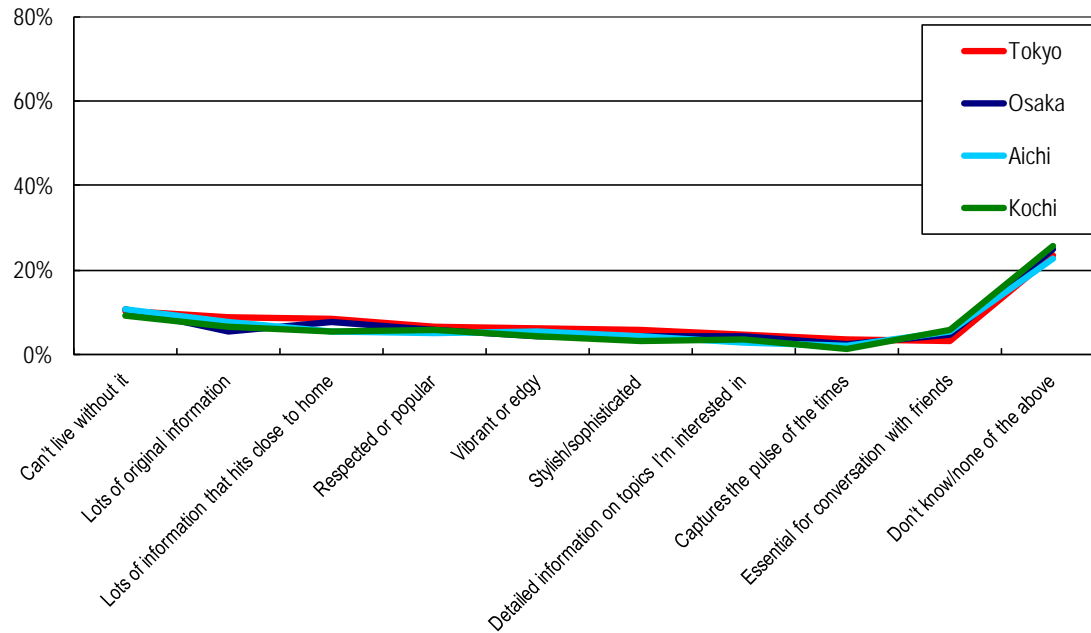
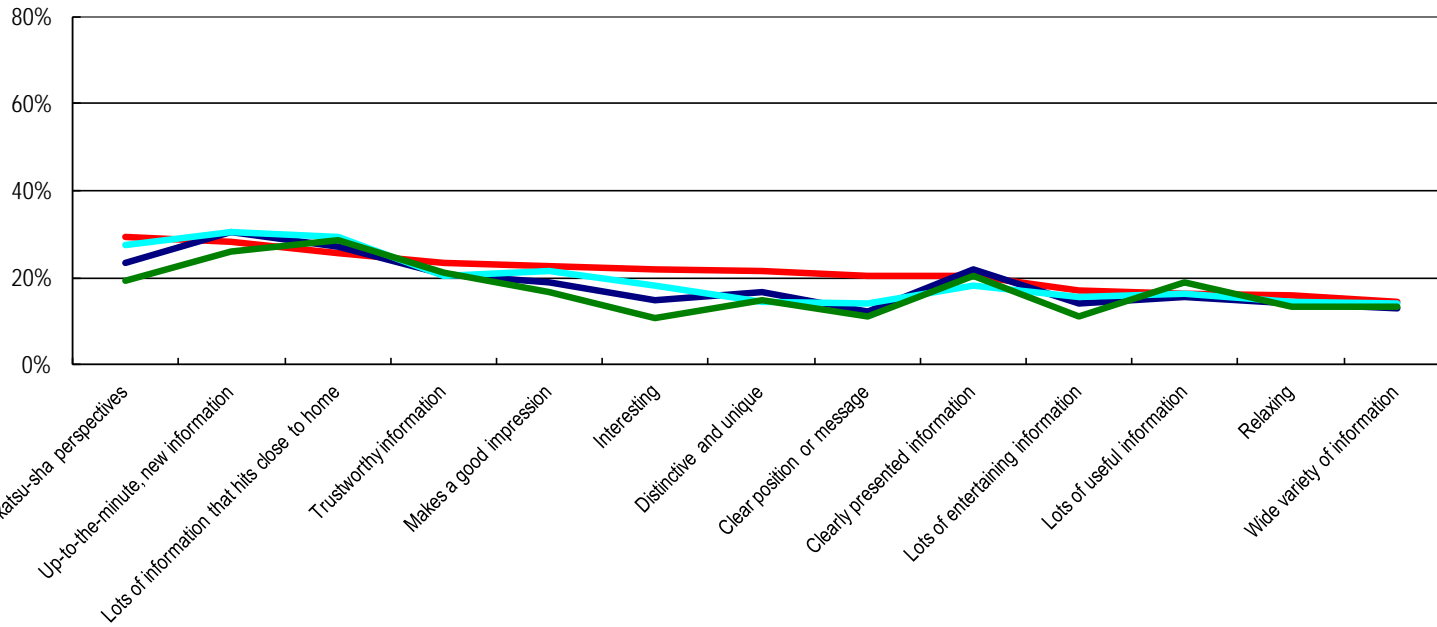
# Media reputation: TV



## Overall reputation scores

Tokyo	<span style="color: red;">█</span>	679%
Osaka	<span style="color: darkblue;">█</span>	664%
Aichi	<span style="color: cyan;">█</span>	658%
Kochi	<span style="color: green;">█</span>	654%

# Media reputation: Radio

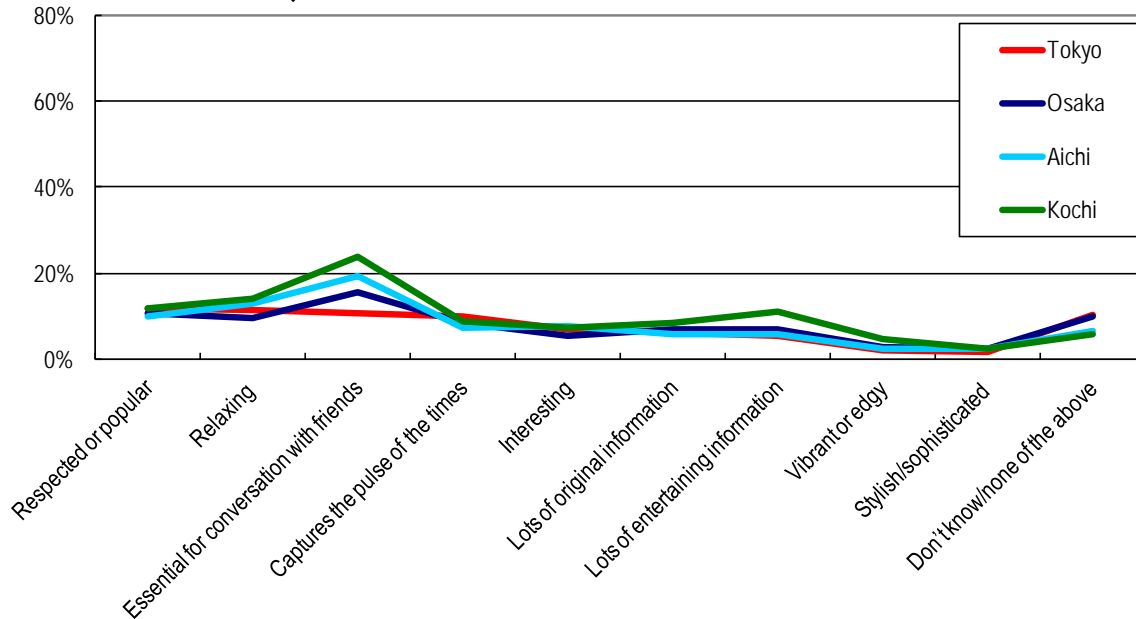
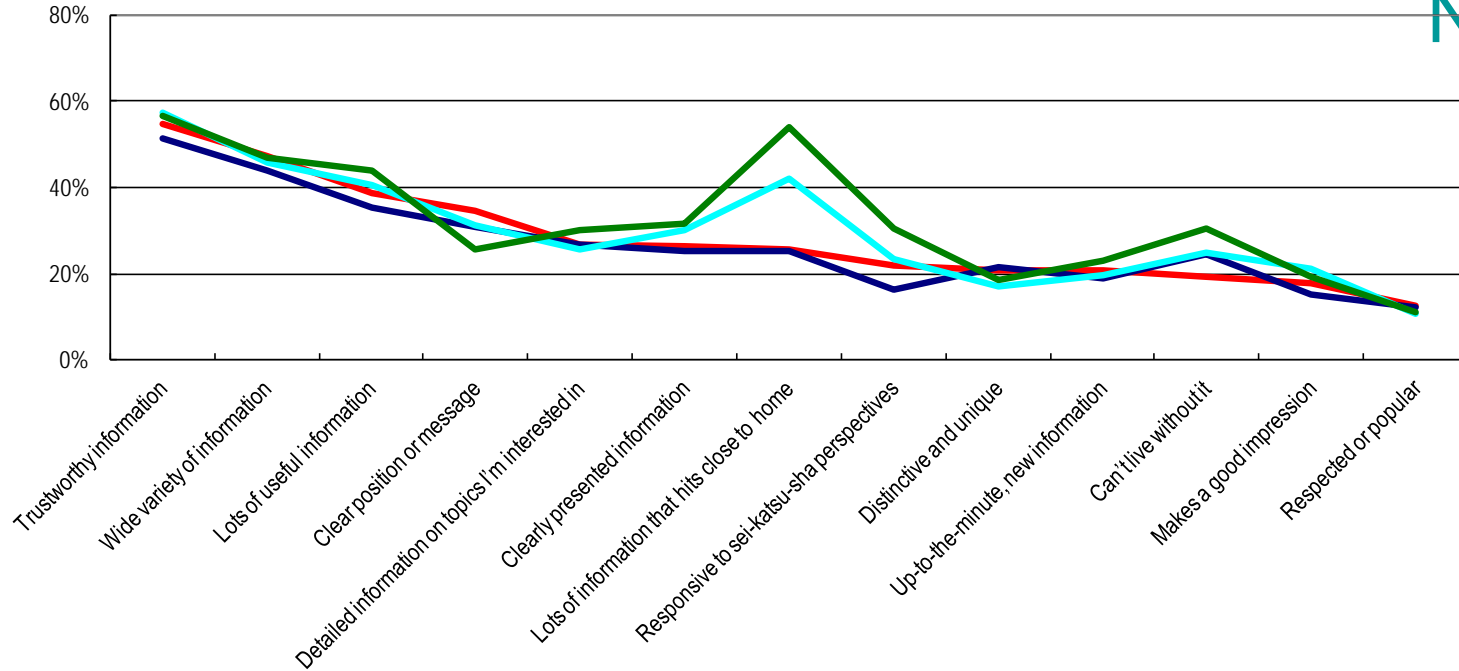


## Overall reputation scores

Tokyo	<span style="color: red;">■</span>	335%
Osaka	<span style="color: darkblue;">■</span>	293%
Aichi	<span style="color: cyan;">■</span>	304%
Kochi	<span style="color: green;">■</span>	271%



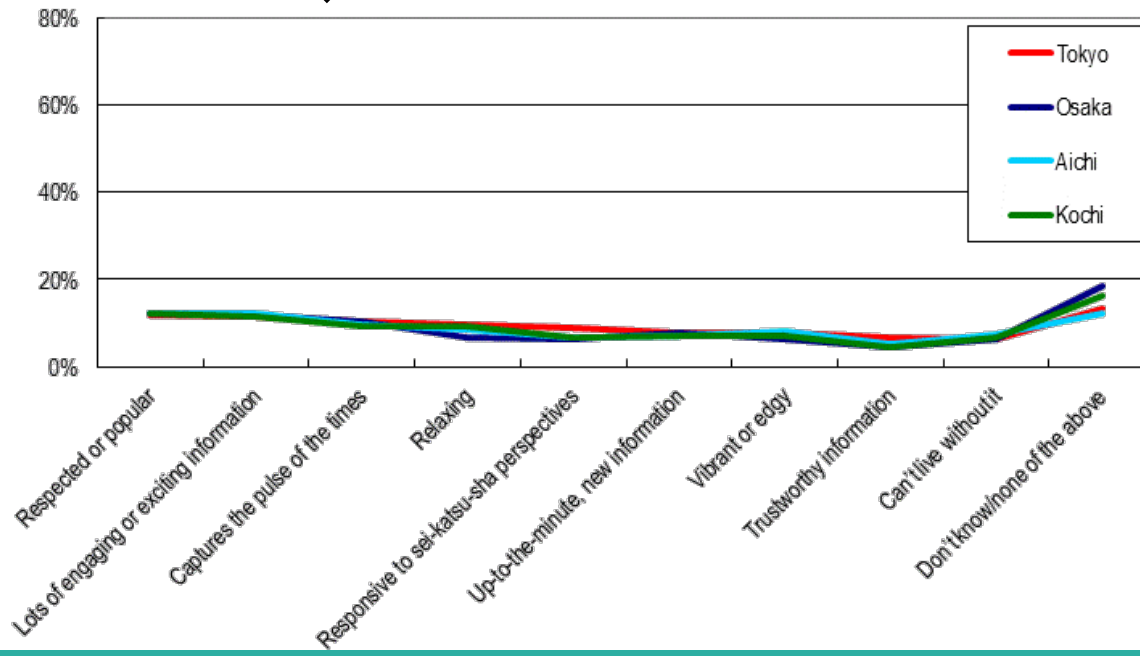
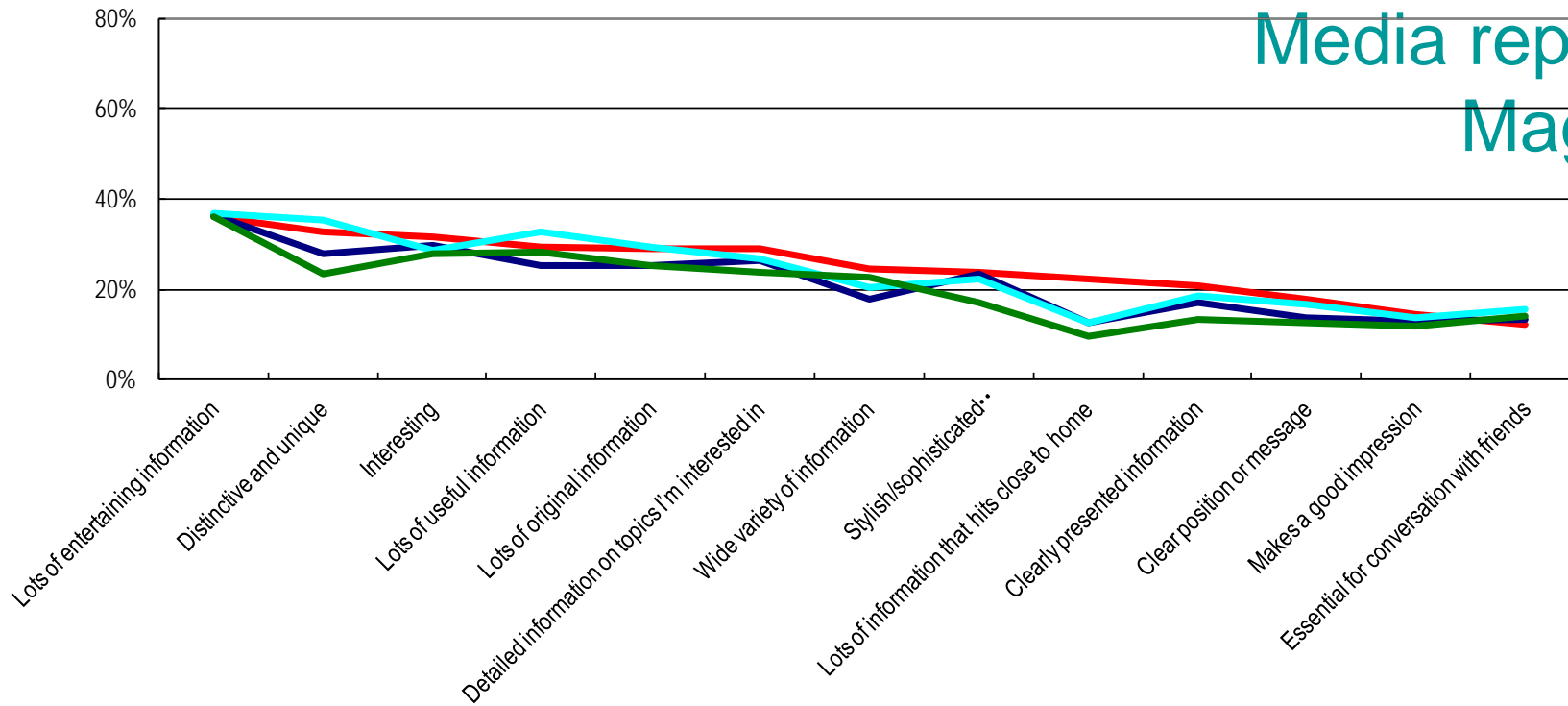
# Media reputation: Newspapers



## Overall reputation scores

Tokyo	<span style="color: red;">■</span>	433%
Osaka	<span style="color: darkblue;">■</span>	416%
Aichi	<span style="color: cyan;">■</span>	464%
Kochi	<span style="color: green;">■</span>	515%

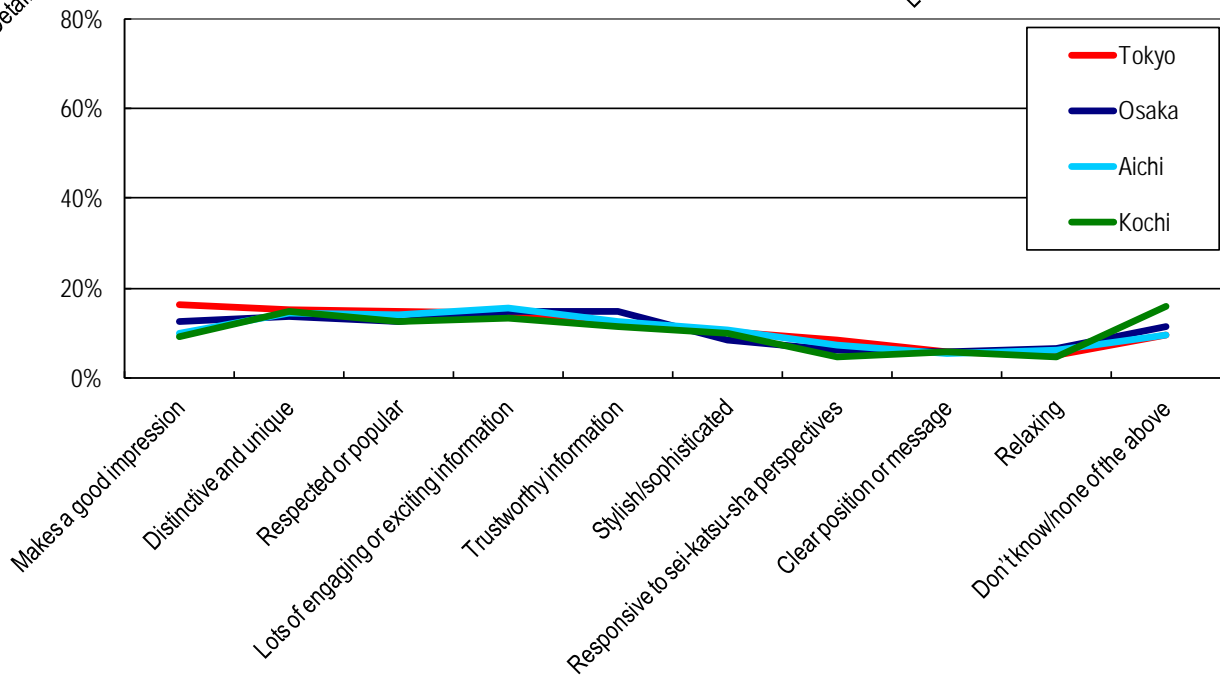
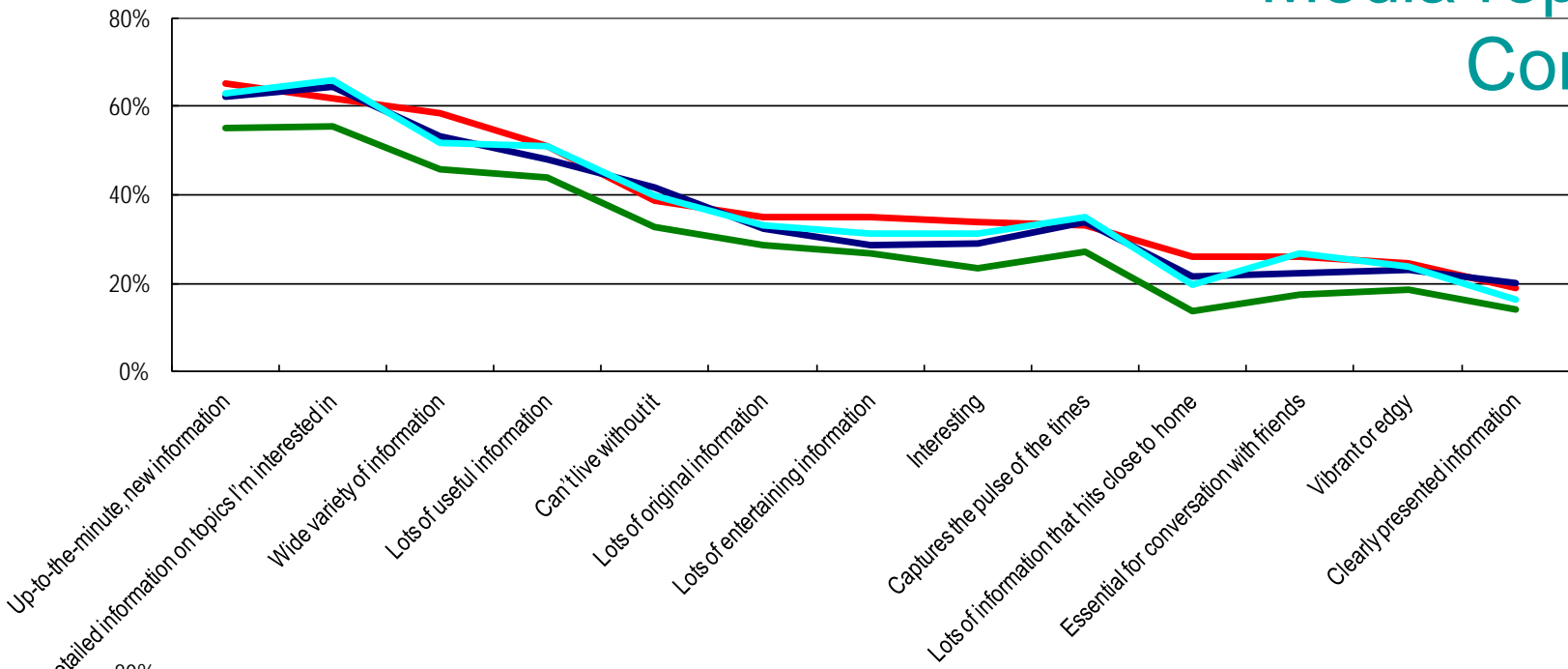
# Media reputation: Magazines



## Overall reputation scores

Tokyo	<span style="color: red;">■</span>	405%
Osaka	<span style="color: darkblue;">■</span>	354%
Aichi	<span style="color: cyan;">■</span>	386%
Kochi	<span style="color: green;">■</span>	339%

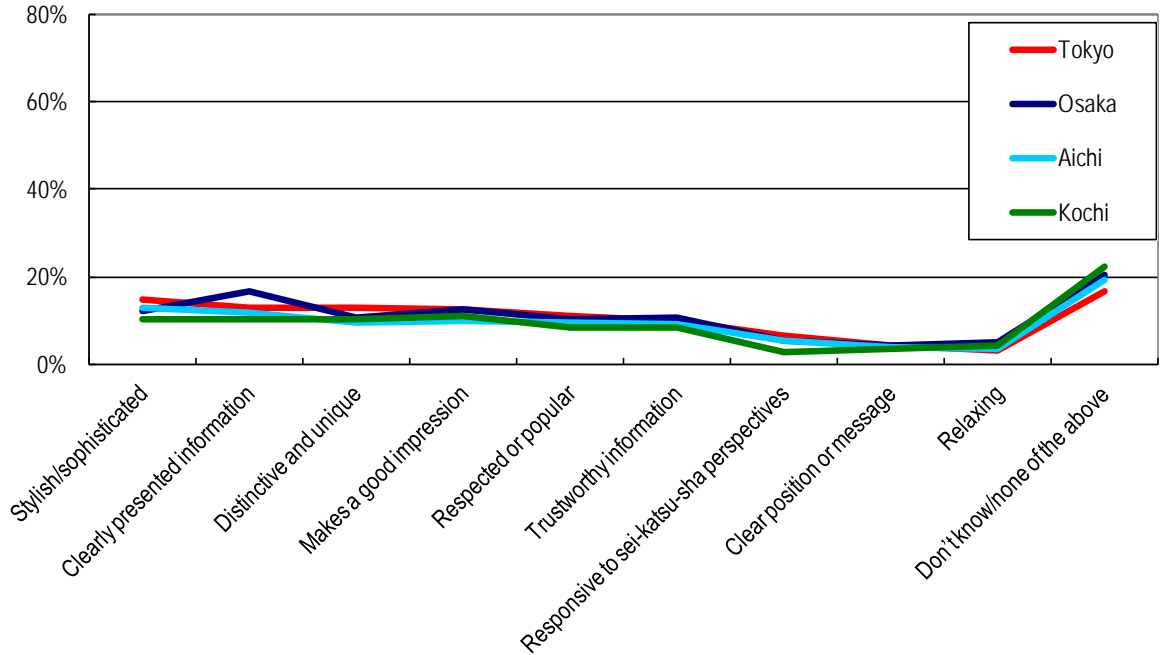
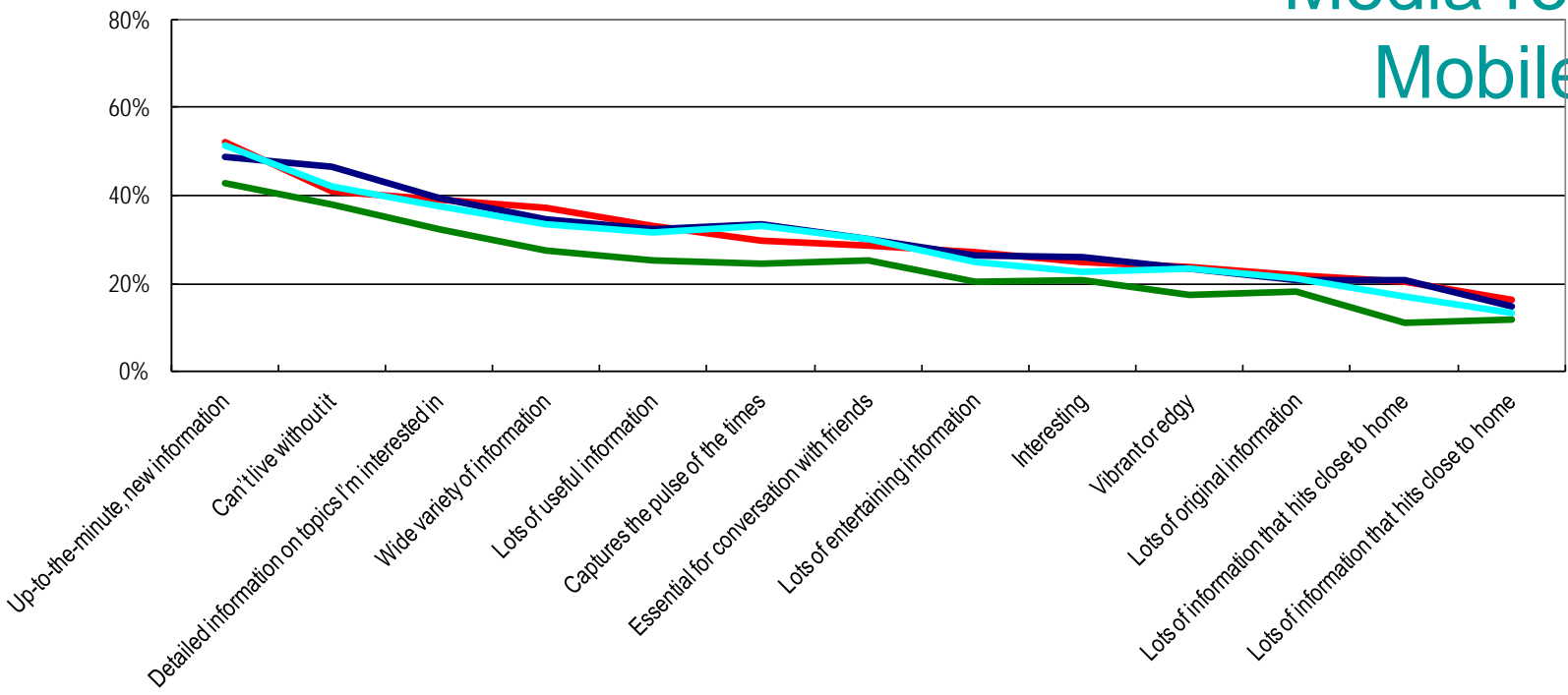
# Media reputation: Computers



## Overall reputation scores

Tokyo	<span style="display:inline-block; width:20px; height:15px; background-color:red;"></span>	610%
Osaka	<span style="display:inline-block; width:20px; height:15px; background-color:darkblue;"></span>	576%
Aichi	<span style="display:inline-block; width:20px; height:15px; background-color:cyan;"></span>	584%
Kochi	<span style="display:inline-block; width:20px; height:15px; background-color:green;"></span>	489%

# Media reputation: Mobile phones

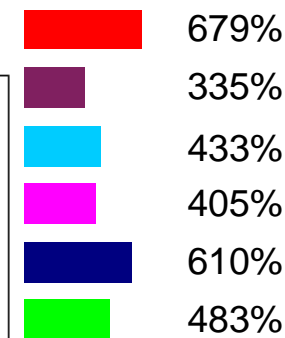
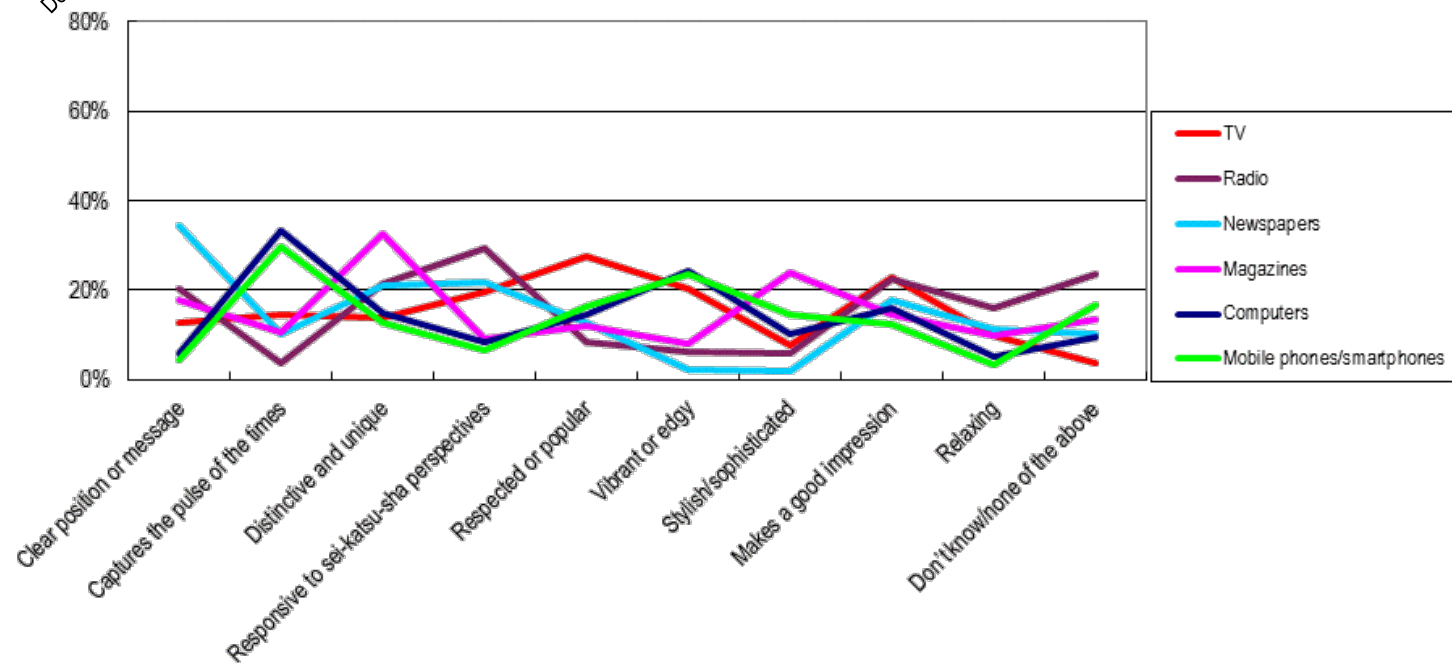
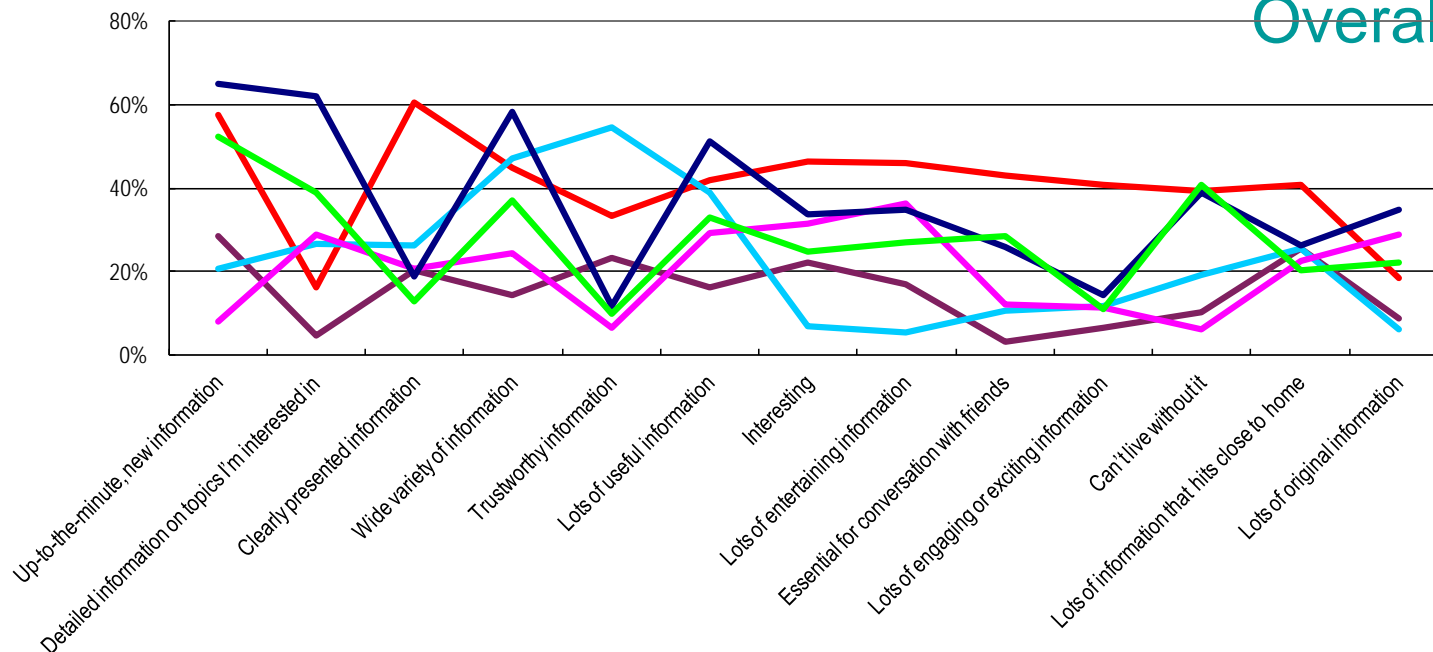


Overall reputation scores

Tokyo	<span style="color: red;">■</span>	483%
Osaka	<span style="color: darkblue;">■</span>	485%
Aichi	<span style="color: cyan;">■</span>	458%
Kochi	<span style="color: green;">■</span>	385%

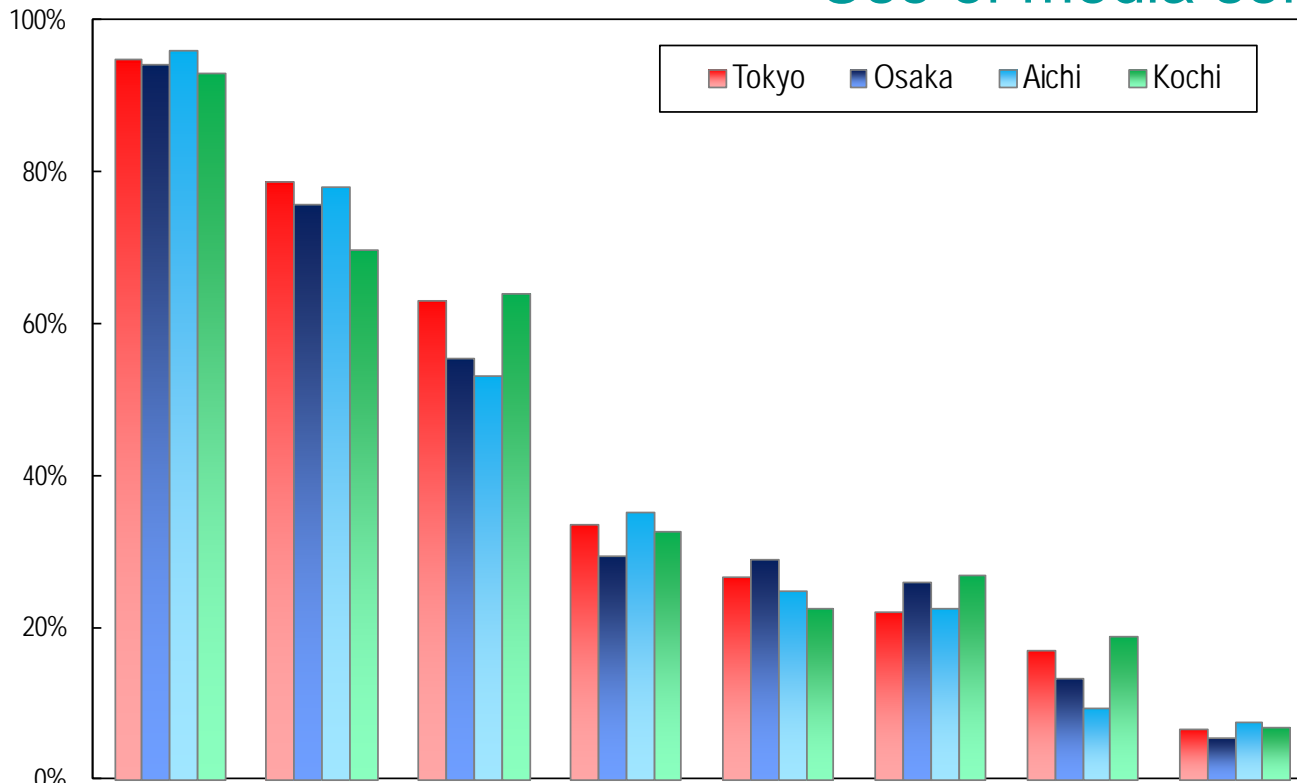
(Tokyo area)

# Media reputation: Overall configuration



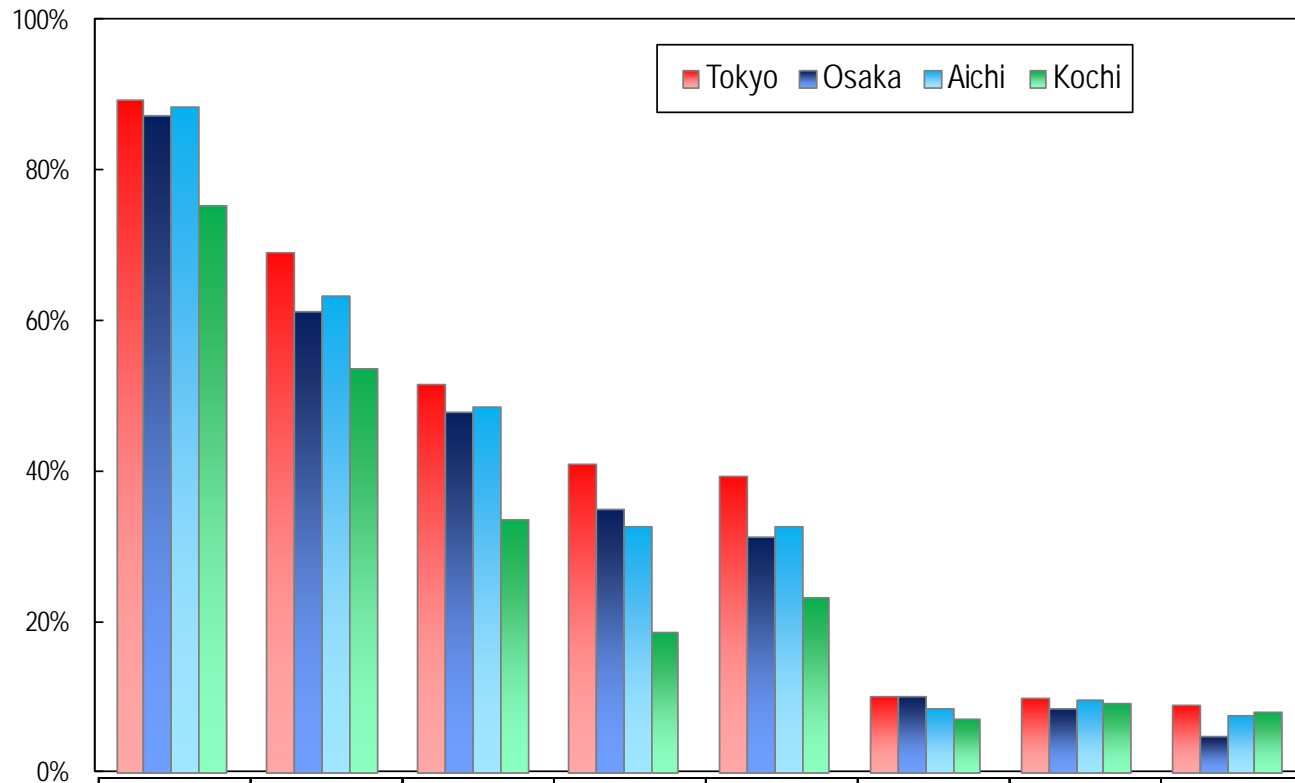
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# Use of media services: TV



N =		Terrestrial digital broadcasts	HD (DVD/Blu-ray) recorder	BS broadcasts	Data broadcasts	Cable (CATV) broadcasts	One-Seg broadcasts	CS broadcasts	Internet TV (IPTV)
Tokyo	2086	95.0	78.8	63.2	33.6	26.6	22.1	17.1	6.6
Osaka	1636	94.2	75.9	55.4	29.4	29.1	26.0	13.3	5.5
Aichi	1619	96.0	78.2	53.1	35.2	24.8	22.5	9.5	7.6
Kochi	1538	93.1	69.7	64.0	32.6	22.6	26.9	18.8	6.8

# Use of media services: Internet



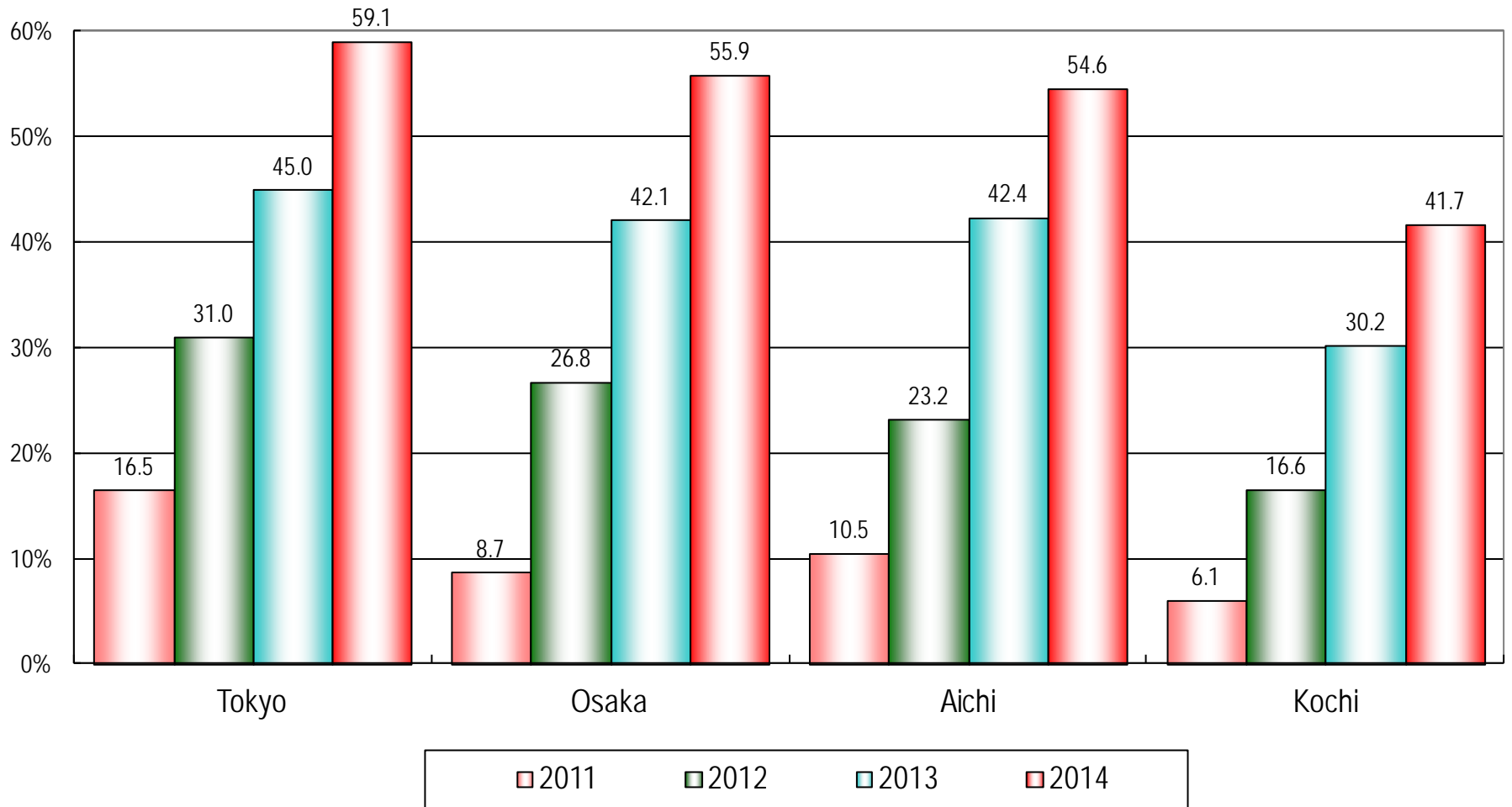
N =

Tokyo	2086	89.5	69.0	51.5	40.9	39.4	10.1	9.9	8.9
Osaka	1636	87.3	61.3	47.8	34.9	31.3	10.2	8.6	4.8
Aichi	1619	88.4	63.3	48.7	32.8	32.6	8.6	9.6	7.6
Kochi	1538	75.3	53.6	33.6	18.6	23.3	7.0	9.1	8.0



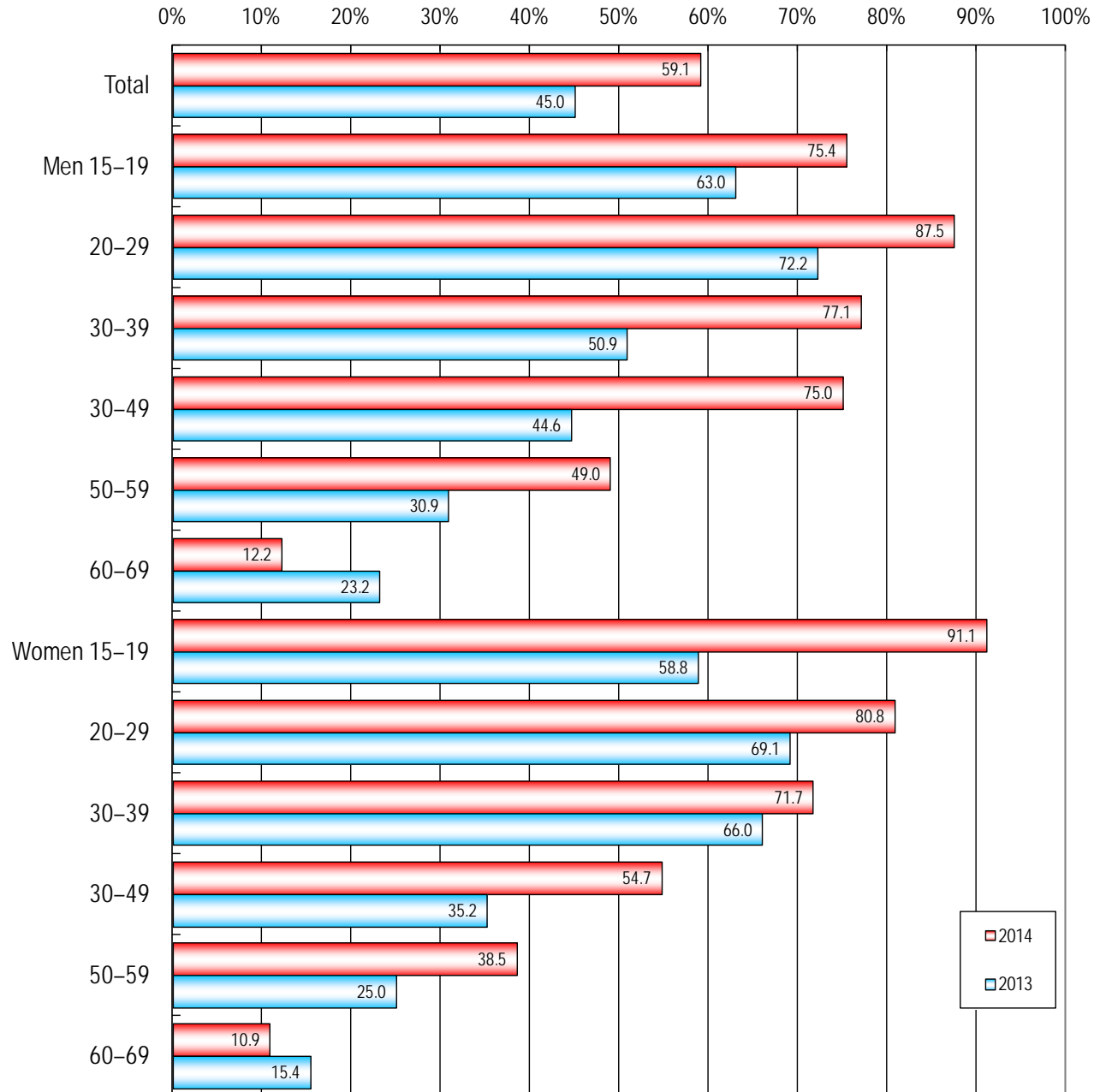
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# Smartphone ownership over time



(Tokyo area)

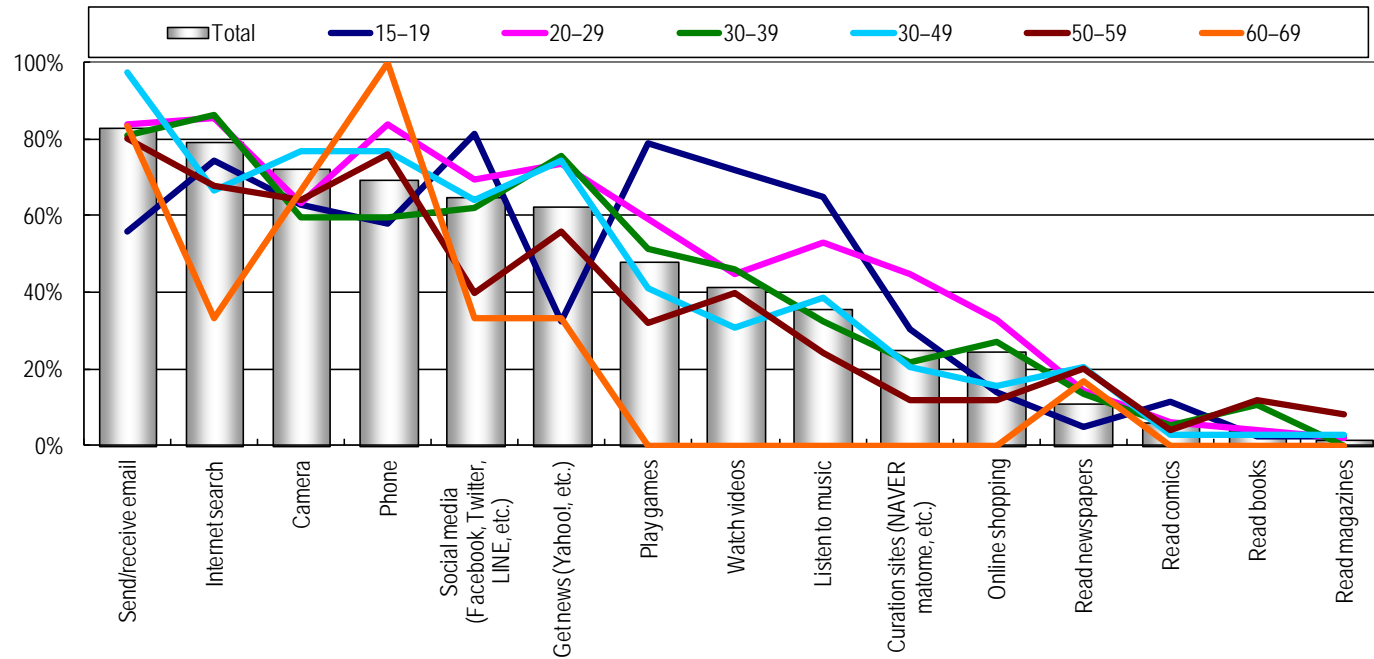
# Smartphone ownership by age/gender



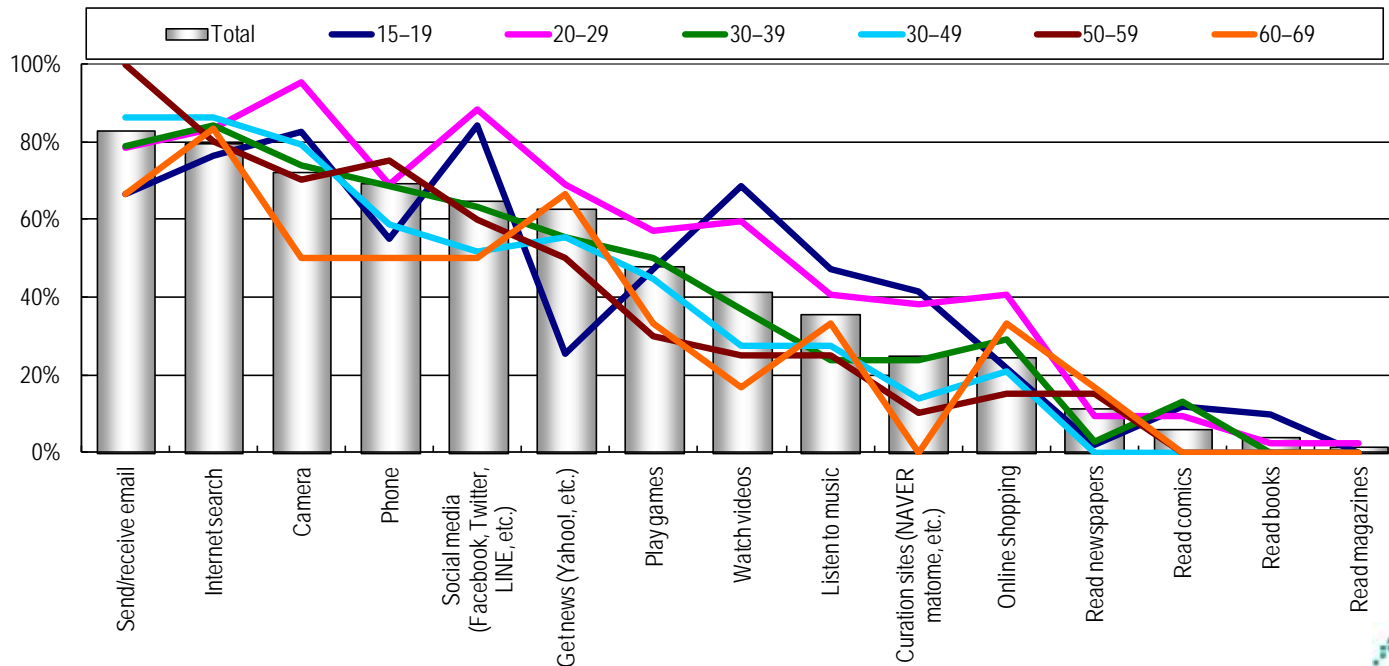
(Tokyo area)

# Smartphone usage by age/gender

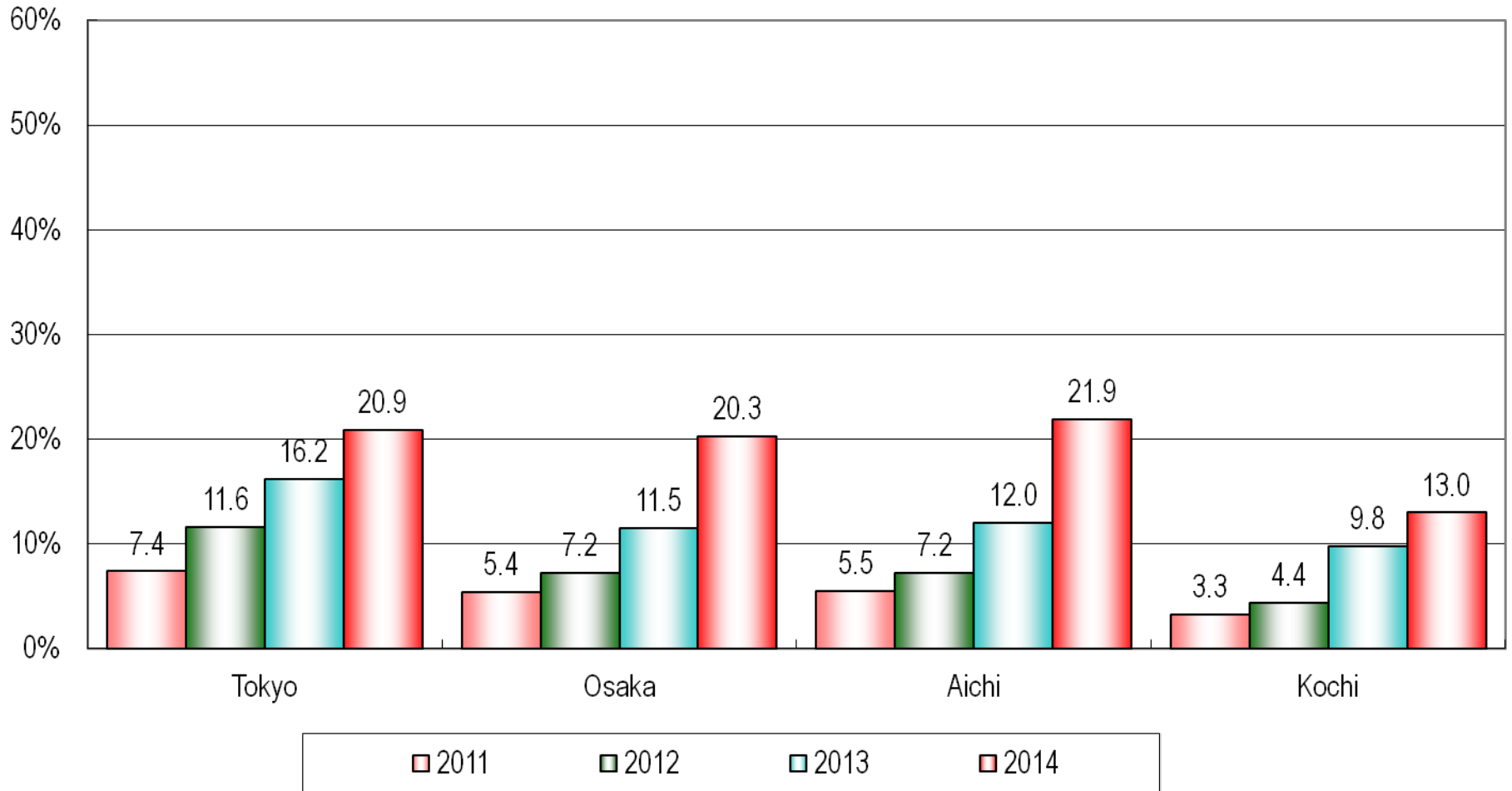
Men



Women

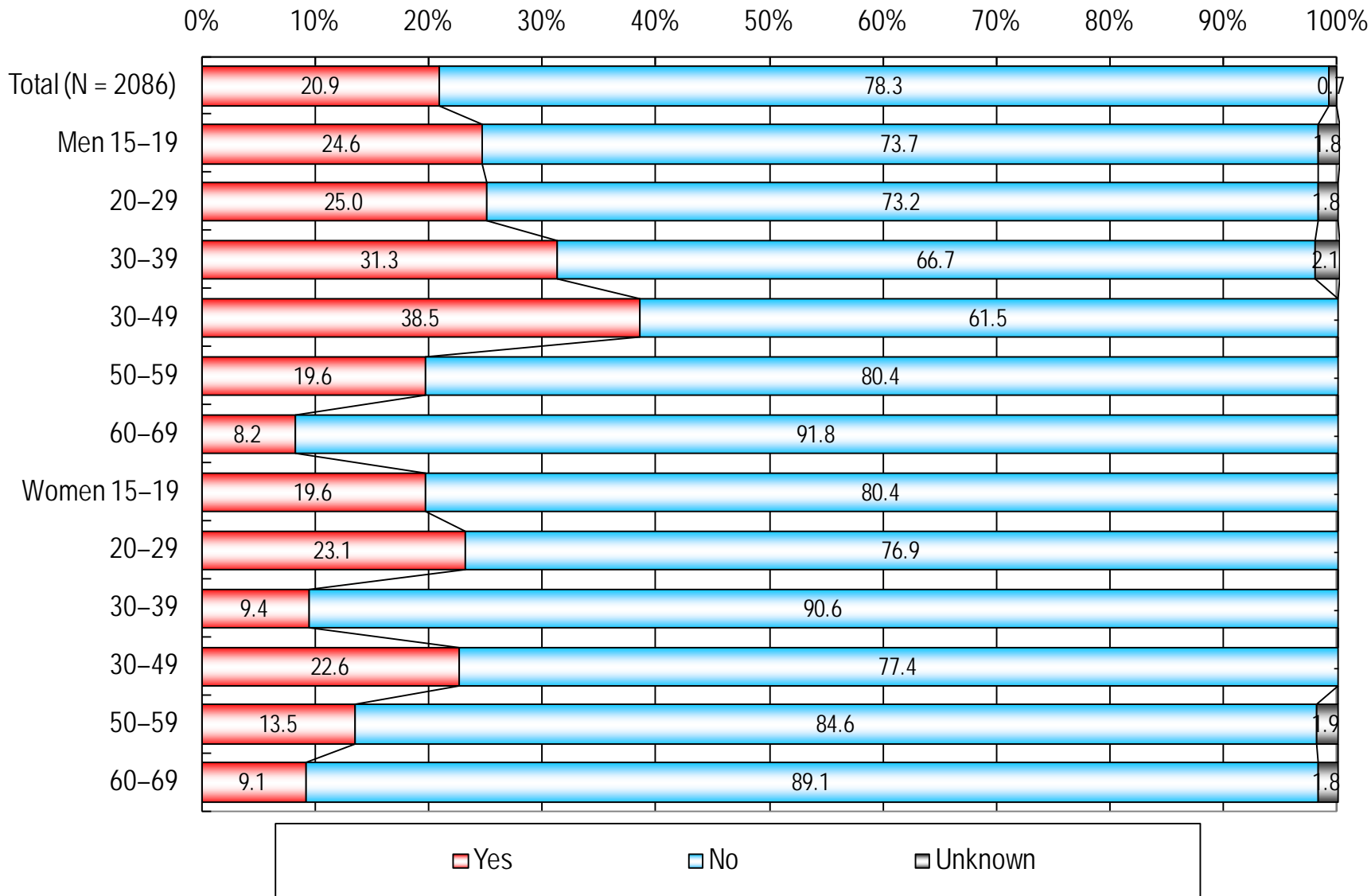


# Tablet ownership over time



(Tokyo area)

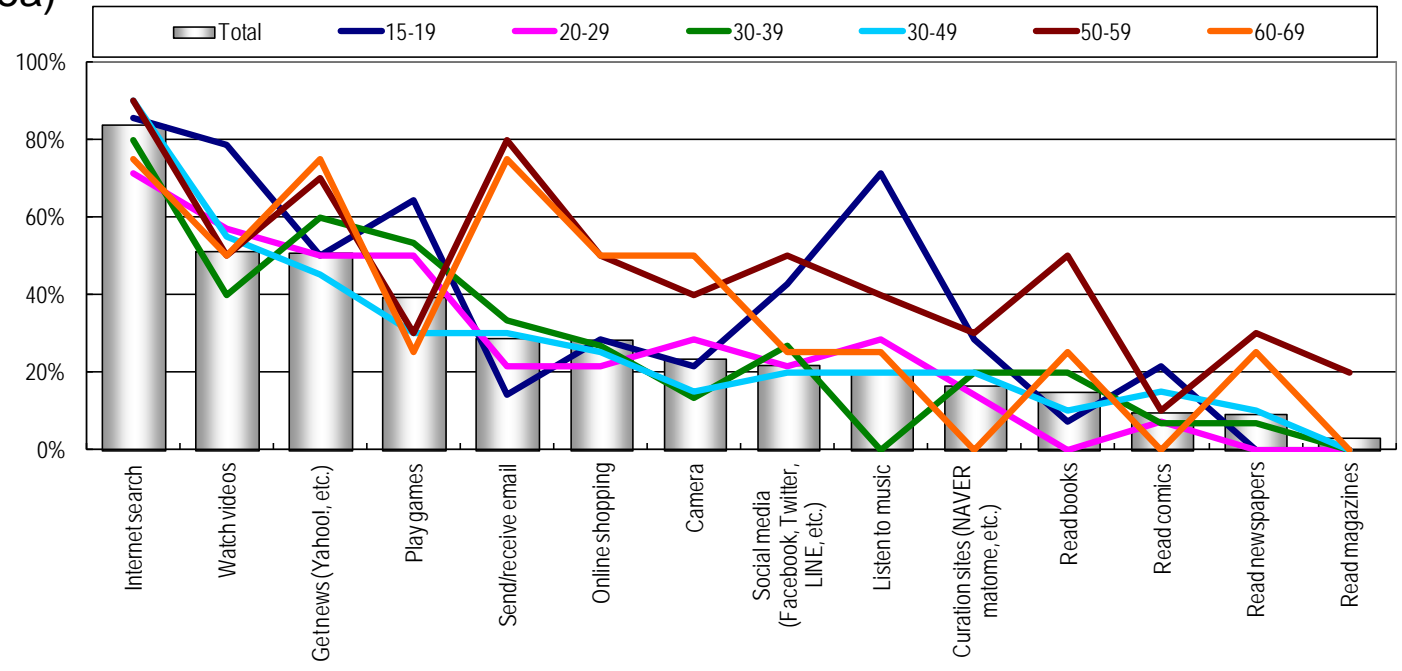
# Tablet ownership by age/gender



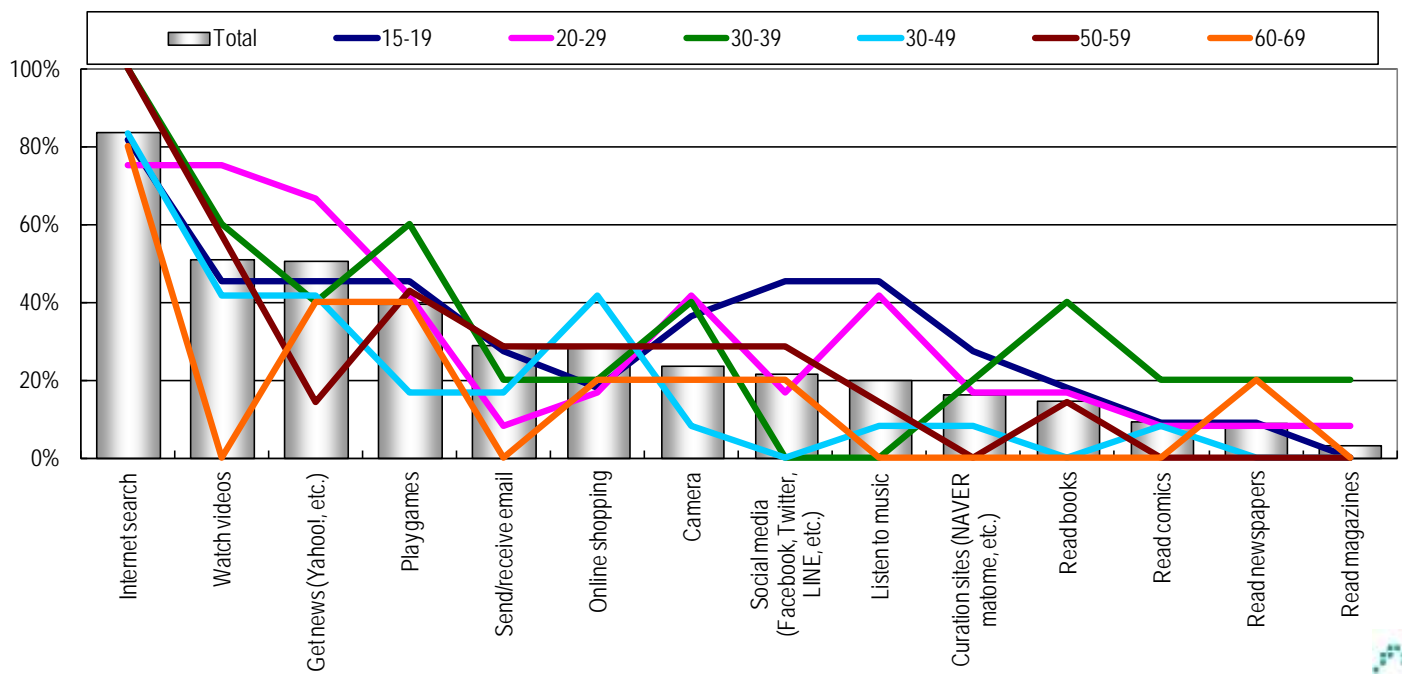
# Tablet functions

(Tokyo area)

Men

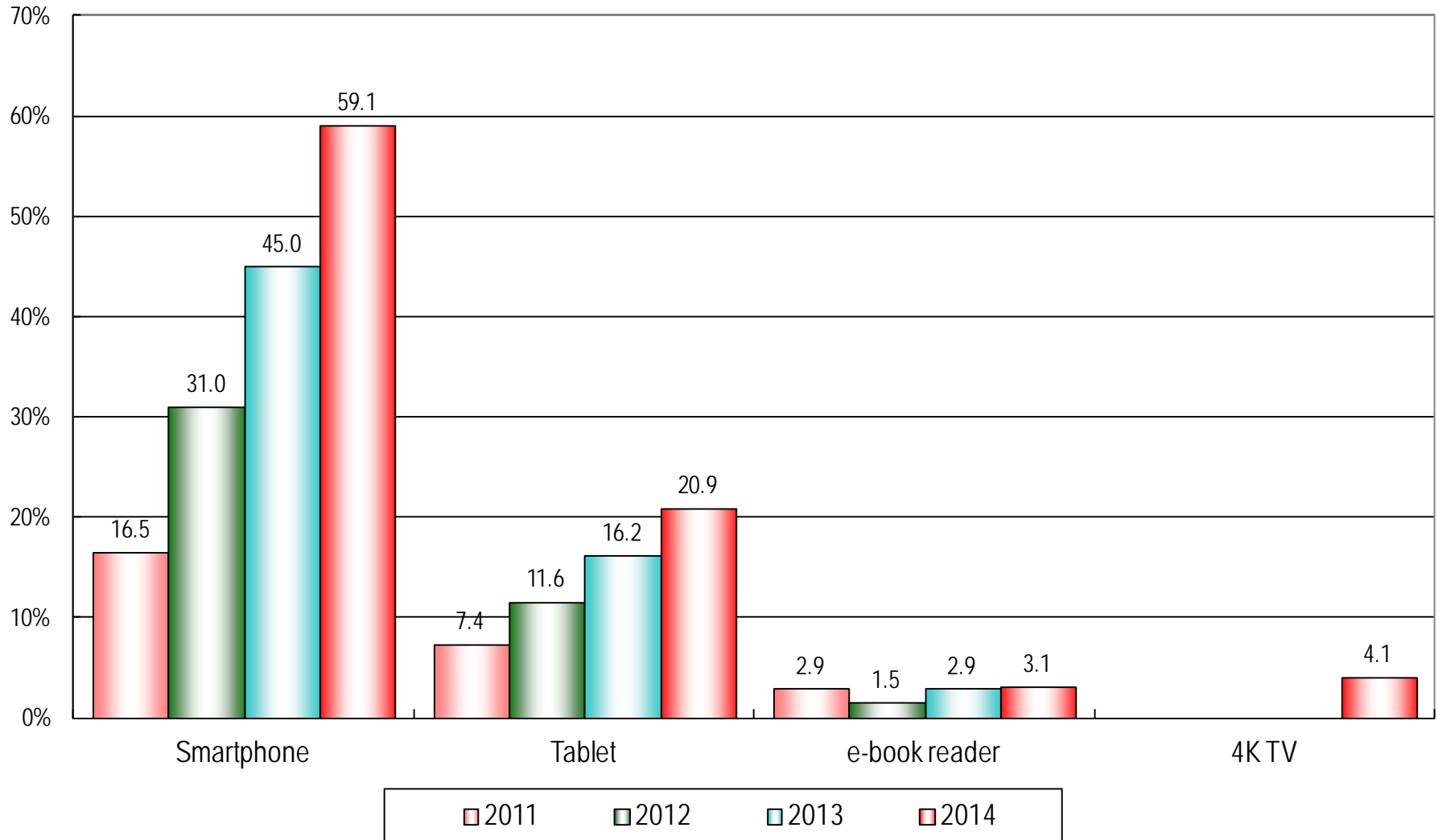


Women



(Tokyo area)

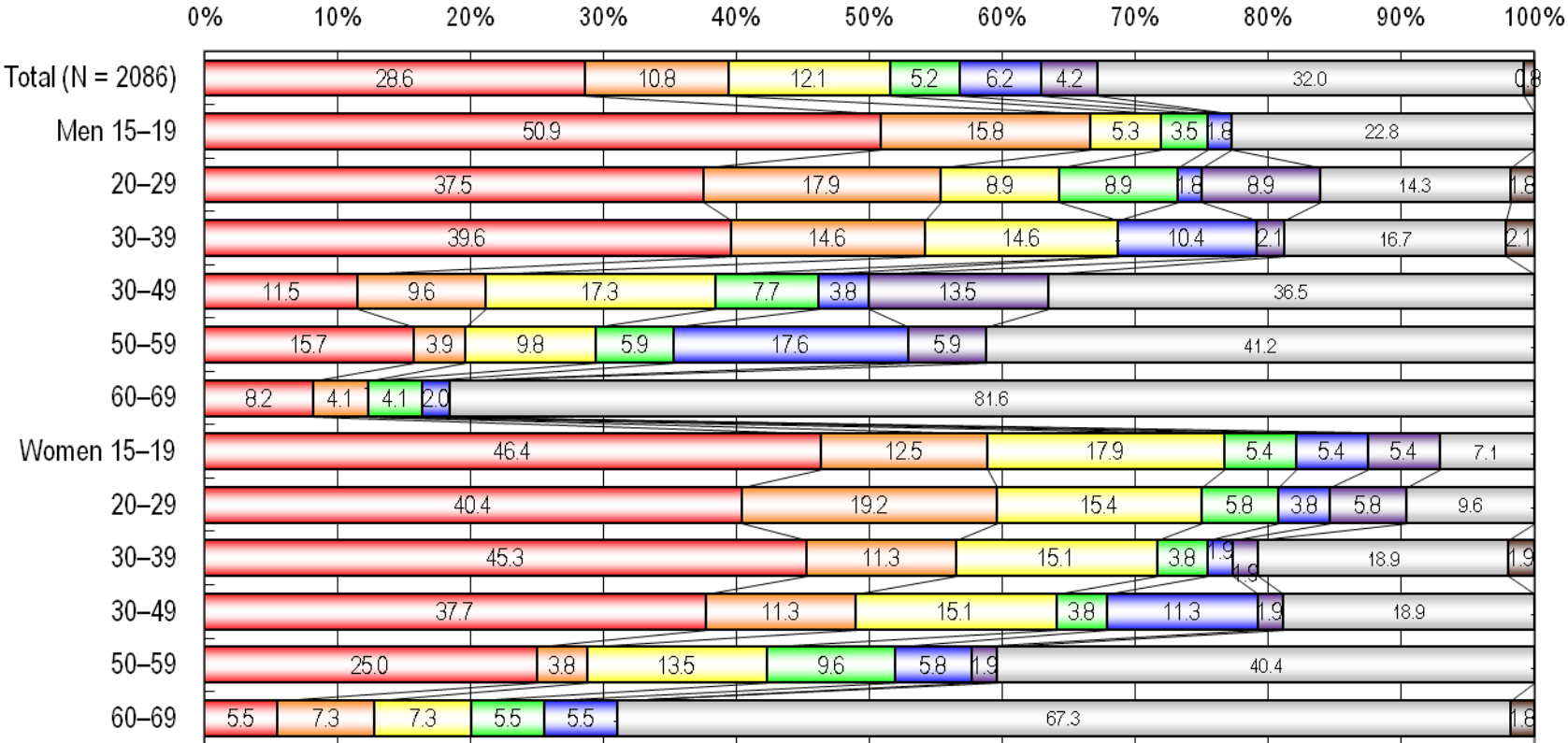
# Digital devices over time





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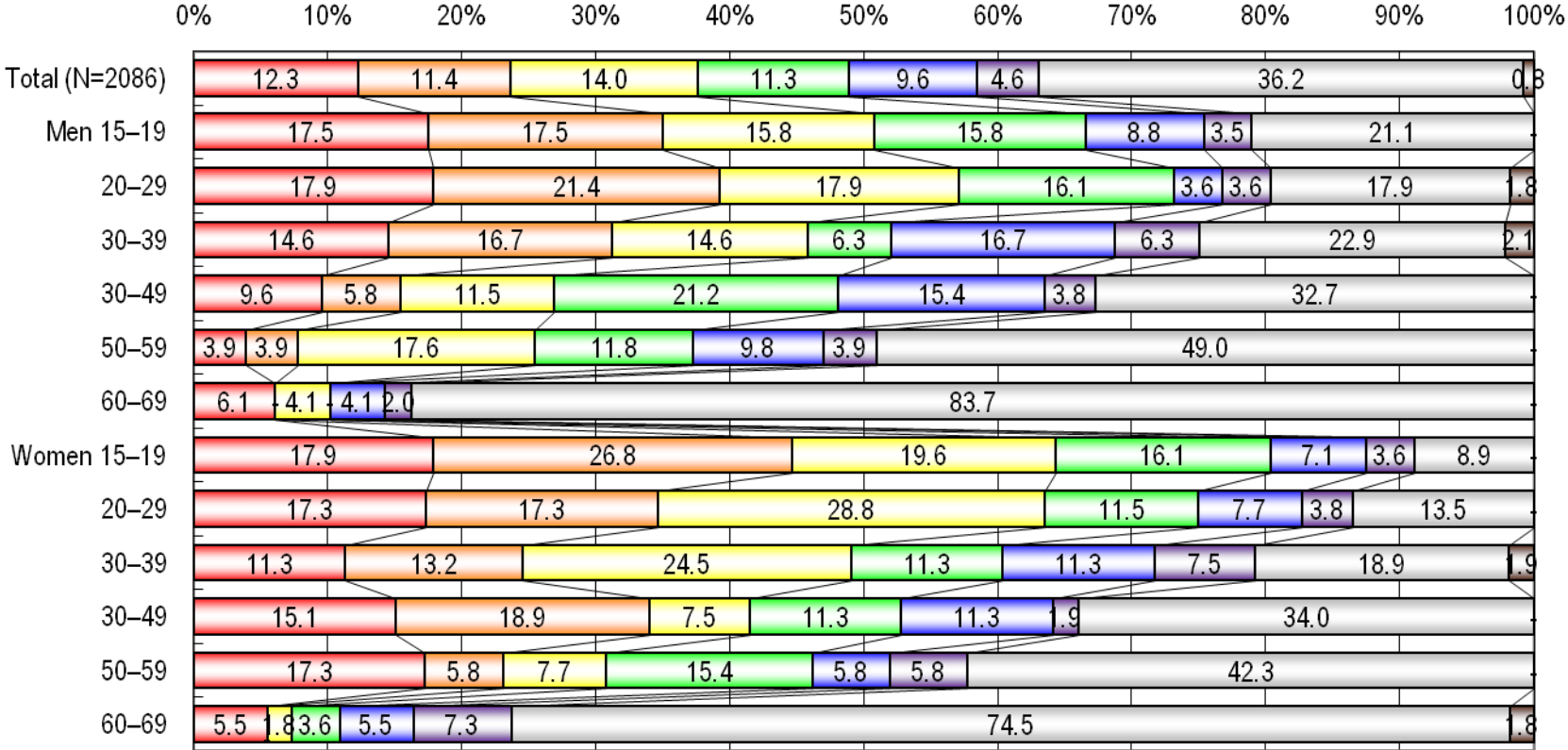
Q. How often do you use your mobile phone, smartphone, or tablet while watching TV?



- Almost every day
- Three to five days a week
- Once or twice a week
- Two or three times a month
- Once a month or less
- I have before, but don't now
- Never
- Unknown

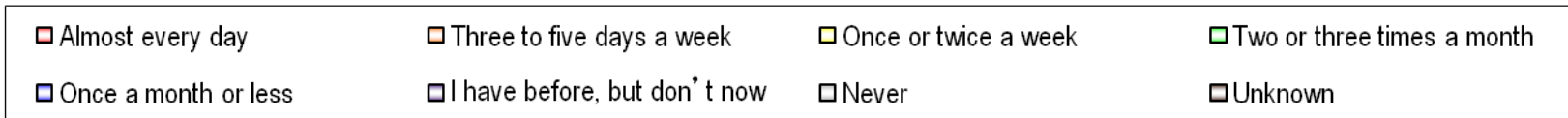
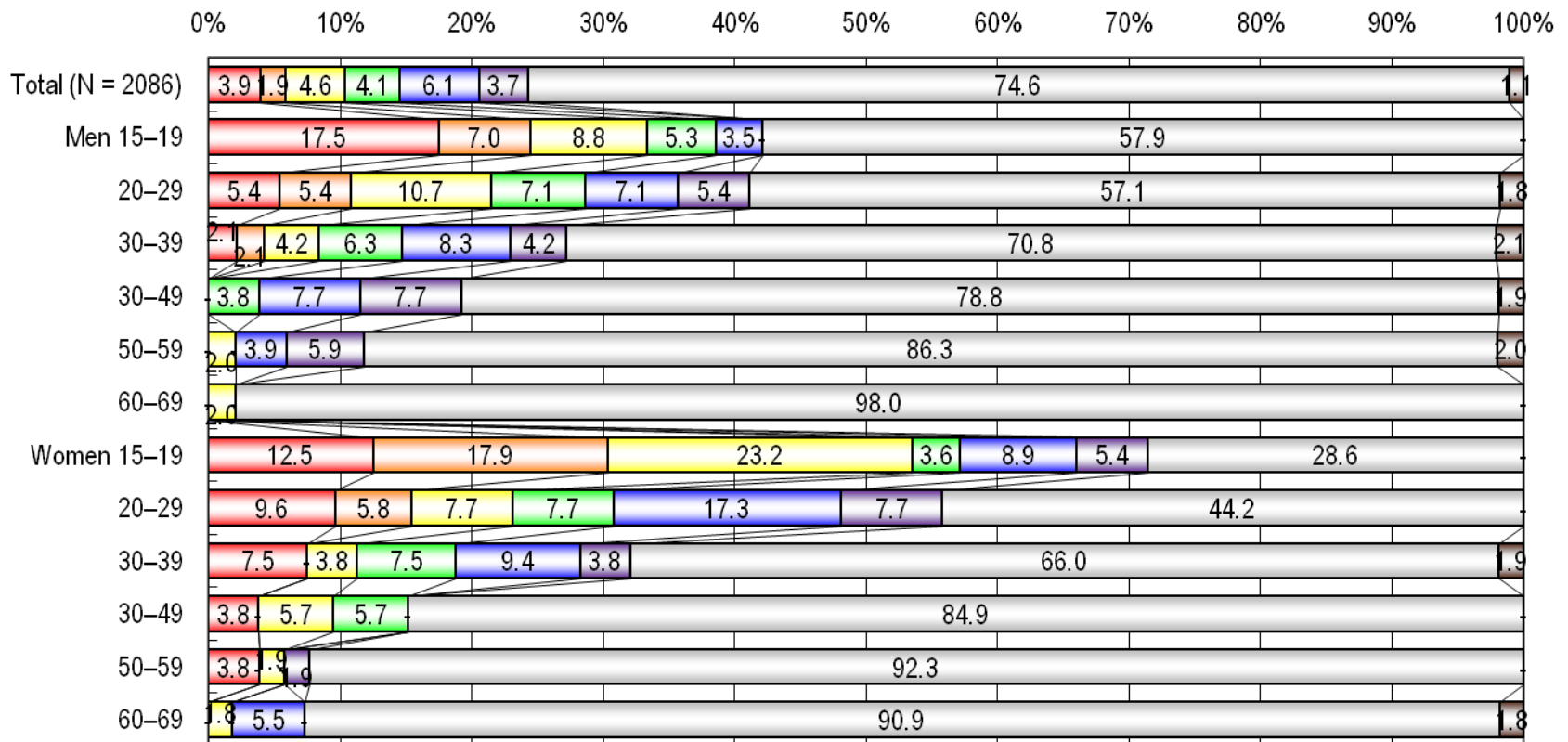
# TV-watching behaviors

Q. When something catches your interest as you watch TV, how often do you immediately use your mobile phone or smartphone to get more information about it?

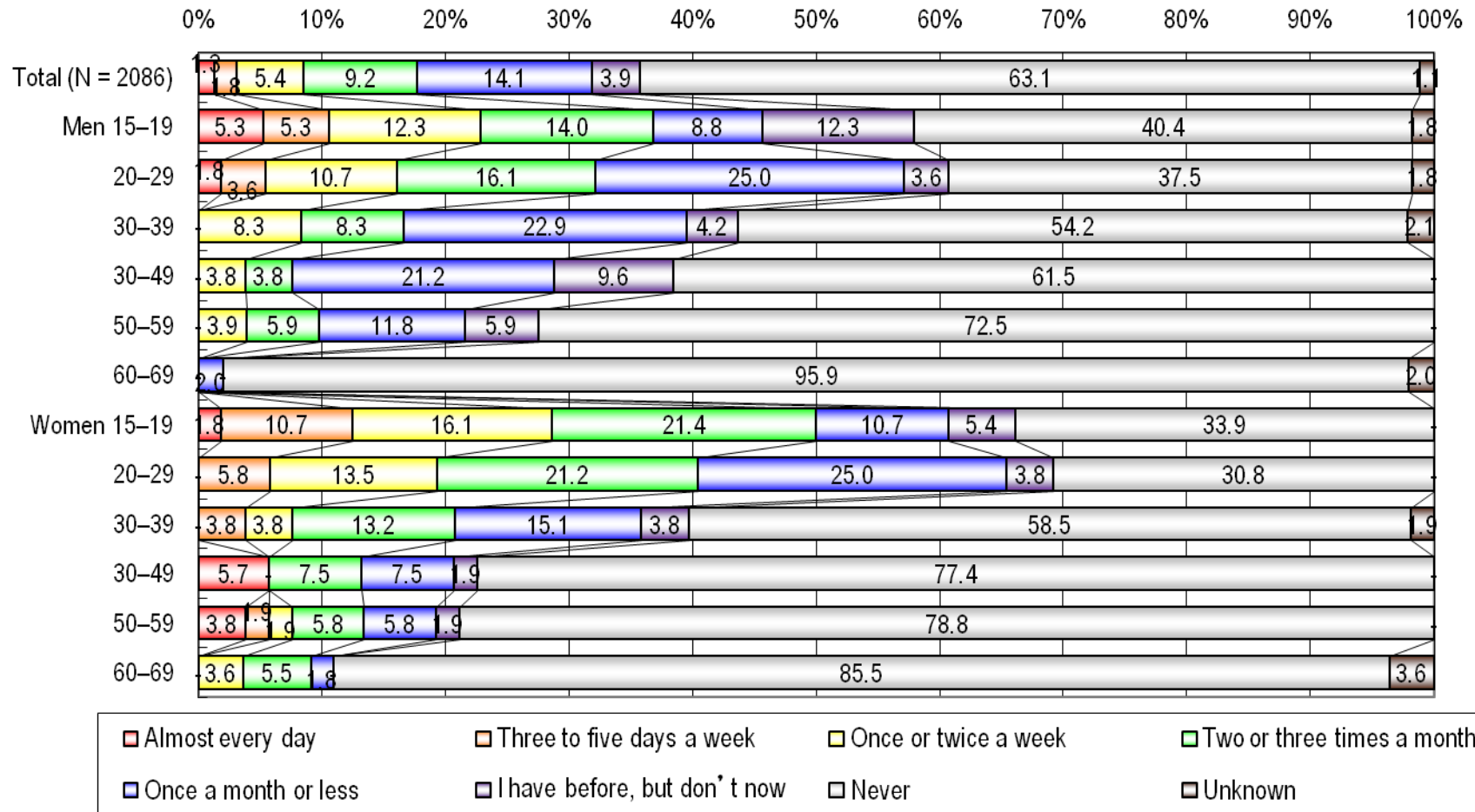


- Almost every day
- Three to five days a week
- Once or twice a week
- Two or three times a month
- Once a month or less
- I have before, but don't now
- Never
- Unknown

Q. How often do you write or read social network posts about a given TV program while you are actually watching it?



Q. How often do you watch a TV program because of information you got through a social media site?

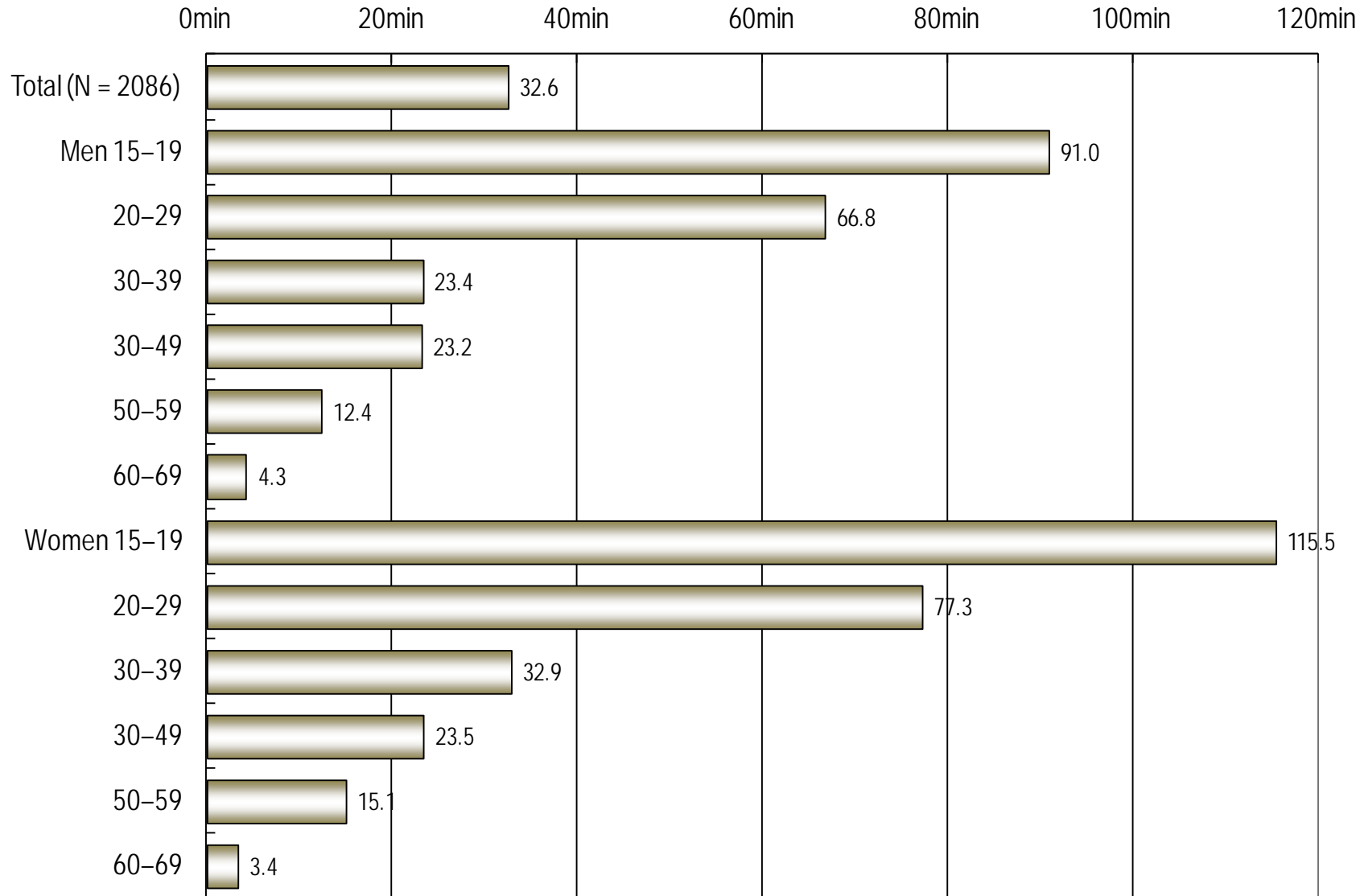


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(Tokyo area)

# Daily social media contact time by age/gender

Weekly averages



# For more information

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