

NEWS RELEASE

June 20, 2016
Hakuhodo DY Media Partners Inc.

Hakuhodo DY Media Partners: Time Series Analysis Findings from the Annual Media Consumption Report 2016

- 1) Media contact time is higher than ever at 393.8 minutes. Total time for feature phones/smartphones plus tablets is nearing 30% of the total.**
- 2) The percentage of people who see feature phones and smartphones as able to provide “up-to-the-minute, new information” has more than tripled in the past ten years.**
- 3) The percentage of televisions connected to the internet has topped 30% for the first time (31.0%).**

The Hakuhodo DY Media Partners Institute of Media Environment, located in Minato-ku, Tokyo, and headed by Masataka Yoshikawa, has been conducting its Annual Media Consumption Report as a way to study and analyze how *sei-katsu-sha* interact with media touchpoints since 2006. The institute carried out a time series analysis as a way to look back on changes in the media environment over the last ten years.

1) Media contact time is higher than ever at 393.8 minutes. Total time for feature phones/smartphones plus tablets is nearing 30% of the total.

- Respondents spend 393.8 minutes in contact with media each day. This figure is up more than ten minutes from last year and has set a new record by entering the 390-minute range for the first time. The increase in contact time is being driven by the increasing use of feature phones/smartphones and tablets, while contact with TV, radio, newspapers, and magazines has also increase slightly. Only computer contact time has fallen.
- Total contact time for feature phones/smartphones and tablets, which surpassed the 25% mark last year, is now on track to hit 30% at 29.3%.
- Smartphone ownership is at 70.7% and has remained largely unchanged since last year. Meanwhile, tablets have jumped ten percentage points since last year with close to four in ten respondents reporting ownership (38.8%).

2) The percentage of people who see feature phones and smartphones as able to provide “up-to-the-minute, new information” has more than tripled in the past ten years.

- Several items have gone up sharply under media reputation for feature phones/smartphones over the last ten years. Most notable is the significant increase in those who see these devices as able to “provide “up-to-the-minute, new information”. Phones surpassed TV on this measure last year, and this year overtook computers as well, coming in at 67.0%. That's more than three times the 21.2% of respondents who agreed with the statement in 2006.
- There has also been a significant increase in the percentage of respondents who say they “can’t live without” feature phones/smartphones (12.2% in 2006 to 53.7% in 2016), as well as in those who believe these devices provide “detailed information on topics I’m interested in” (12.2% in 2006 to 47.7% in 2016).
- There were significant increases in the reputation of other forms of media as well over the past ten years. The percentage of respondents who see TV as having “clearly presented information” has gone from 58.9% in 2006 to 69.3% in 2016; radio as “responsive to reader/viewer perspectives” from 21.6% to 30.0%; newspapers as having a “clear position or message” from 38.1% to 48.3%; magazines as “stylish, sophisticated, or hip” from 22.5% to 30.8%; and computers as having “lots of original information” from 31.4% to 41.3%.

3) The percentage of televisions connected to the internet has topped 30% for the first time (31.0%).

- The percentage of televisions connected to the internet was around 20% when this indicator was first measured in 2012, but went up nearly eight percentage points this year to exceed 30% for the first time at 31.0%.

Note: All figures are for the Tokyo area

■ Survey design

Survey area: Tokyo, Osaka, Aichi, and Kochi prefectures
Sampling method: Random Digit Dialing (RDD)
Survey method: Survey by post
Subjects: Males and females age 15–69
Sample configuration: 2543 samples in four areas (637 from Tokyo, 641 from Osaka, 644 from Aichi, 621 from Kochi)
Age and gender groups weighted according to the FY2015 Basic Resident Register
Survey period: January 28, 2016 through February 12, 2016
Conducted by: Video Research Ltd.

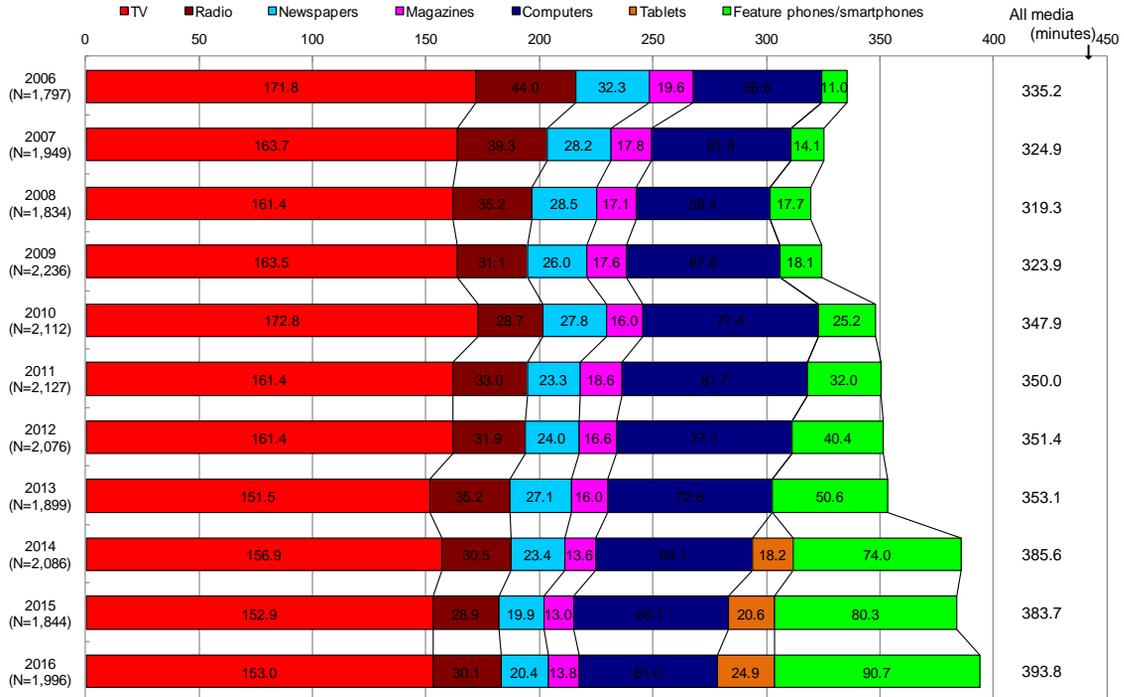
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Annual Media Consumption Report: Time series analysis

1-1) Total daily media contact time (weekly averages): Tokyo area

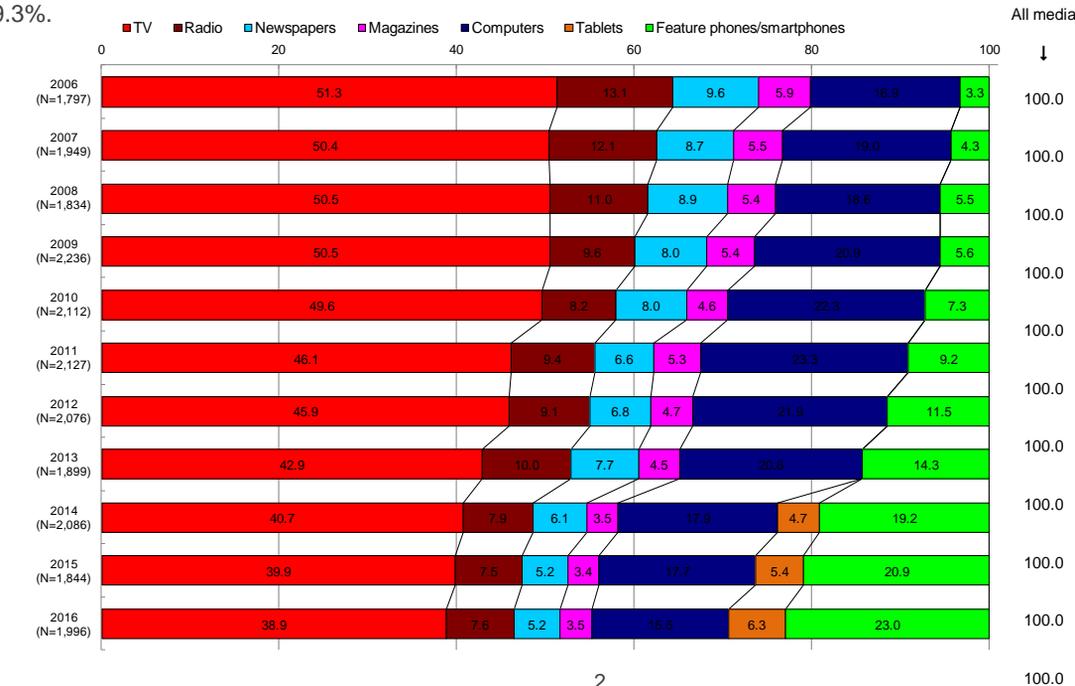
The Annual Media Consumption Report 2016 found a total media contact time of 393.8, breaking into the 390-minute range for the first time. Looking back over the last ten years, we see significant growth in time spent with digital media alongside a decrease in traditional media, though traditional media contact time did increase slightly in 2016. If we break down digital media by device, we see that time spent with computers has been falling since peaking in 2011, with feature phones/smartphones overtaking them in 2014. Feature phones/smartphones is the only device category where contact time increased steadily over the last decade.



Note:
 Smartphones were added in 2012, changing the "mobile phones" category to "feature phones/smartphones"
 Tablet figures were added in 2014
 "Internet access via computer" was changed to "computers" in 2014, while "internet access via feature phone or smartphone" was changed to "feature phones/smartphones"

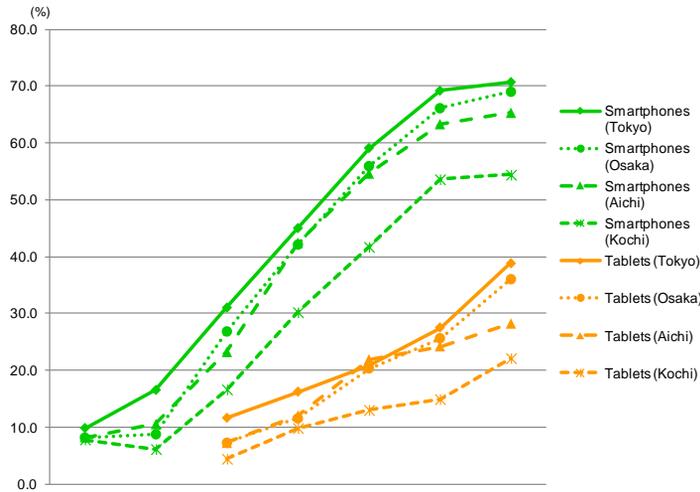
1-2) Contact time by media category (weekly averages): Tokyo area

The percentage of total media contact time accounted for by digital media has been growing each year, driven by time spent with feature phones/smartphones. Phone time surpassed computer time two years ago, and the gap has only widened two years in a row. Total contact time for feature phones/smartphones plus tablets is now nearing 30% of the total at 29.3%.



1-3) Smartphone and tablet ownership: All four areas

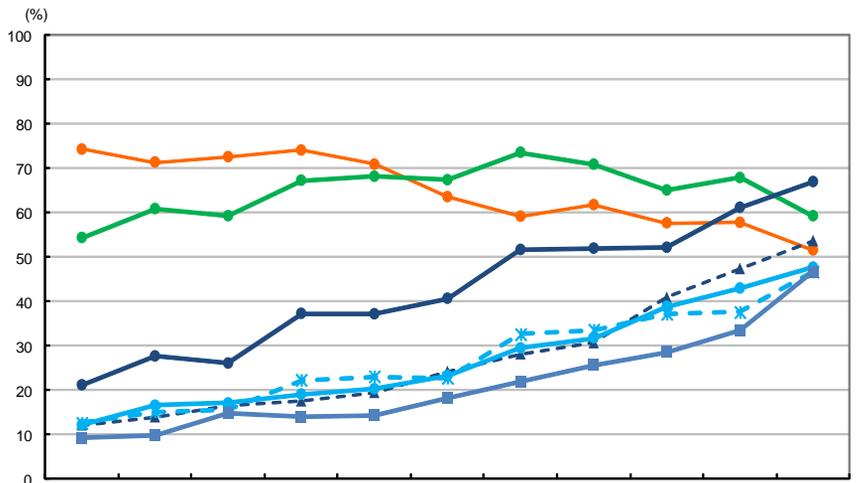
Smartphone ownership has seen explosive growth, up more than 700% in the six years since the survey began measuring it (in the Tokyo area) in 2010. Starting last year, however, this growth began to level off. Meanwhile, tablet ownership (in Tokyo) is up more than ten percentage points over last year, reaching nearly four in ten at 38.8%.



	2010	2011	2012	2013	2014	2015	2016
Smartphones (Tokyo)	(N=2,112) 9.8	(N=2,127) 16.5	(N=2,076) 31.0	(N=1,899) 45.0	(N=2,086) 59.1	(N=1,844) 69.2	(N=1,996) 70.7
Smartphones (Osaka)	(N=1,663) 8.1	(N=1,736) 8.7	(N=1,712) 26.8	(N=1,615) 42.1	(N=1,636) 55.9	(N=1,693) 66.1	(N=1,557) 69.0
Smartphones (Aichi)	(N=1,678) 8.2	(N=1,664) 10.5	(N=1,711) 23.2	(N=1,596) 42.4	(N=1,619) 54.6	(N=1,538) 63.3	(N=1,705) 65.3
Smartphones (Kochi)	(N=1,648) 7.8	(N=1,595) 6.1	(N=1,691) 16.6	(N=1,537) 30.2	(N=1,538) 41.7	(N=1,568) 53.6	(N=1,579) 54.4
Tablets (Tokyo)			(N=2,076) 11.6	(N=1,899) 16.2	(N=2,086) 20.9	(N=1,844) 27.5	(N=1,996) 38.8
Tablets (Osaka)			(N=1,712) 7.2	(N=1,615) 11.5	(N=1,636) 20.3	(N=1,693) 25.6	(N=1,557) 36.0
Tablets (Aichi)			(N=1,711) 7.2	(N=1,596) 12.0	(N=1,619) 21.9	(N=1,538) 24.2	(N=1,705) 28.2
Tablets (Kochi)			(N=1,691) 4.4	(N=1,537) 9.8	(N=1,538) 13.0	(N=1,568) 14.9	(N=1,579) 22.1

2-1) Feature phone/smartphone reputation: Tokyo area

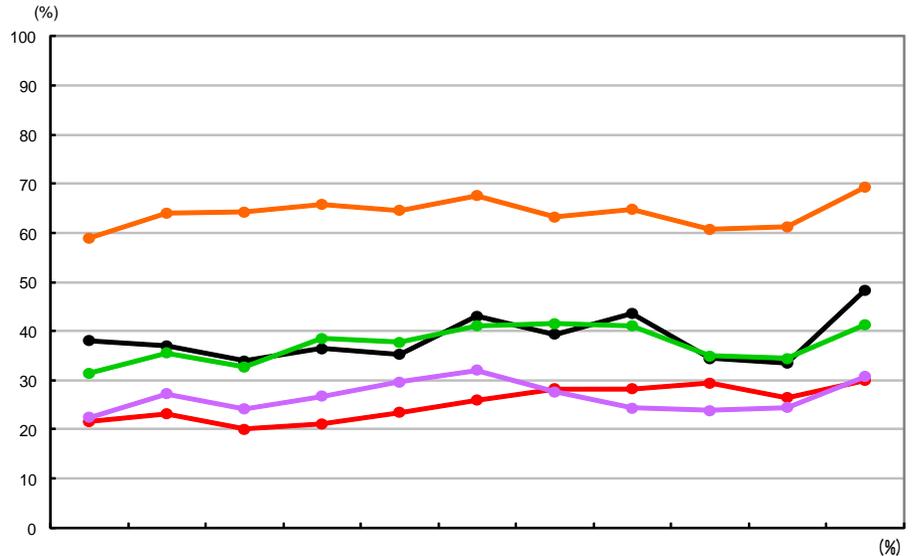
The reputation of feature phones and smartphones has grown as smartphones have become more widespread over the last ten years. Most notable is the significant increase in those who see these devices as able to “provide up-to-the-minute, new information”. Phones surpassed TV on this measure last year, and this year overtook computers as well, coming in at 67.0%. That's more than three times the 21.2% of respondents who agreed with the statement in 2006.



Media category	Reputation	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
TV	Up-to-the-minute, new information	(N=1,797) 74.3	(N=1,949) 71.4	(N=1,834) 72.6	(N=2,236) 74.1	(N=2,112) 70.9	(N=2,127) 63.6	(N=2,076) 59.2	(N=1,899) 61.8	(N=2,086) 57.7	(N=1,844) 57.8	(N=1,996) 51.6
Computers	Up-to-the-minute, new information	54.4	60.9	59.3	67.3	68.2	67.4	73.6	70.9	65.1	67.9	59.3
Feature phones/smartphones	Up-to-the-minute, new information	21.2	27.7	26.1	37.3	37.2	40.7	51.7	52.0	52.2	61.2	67.0
Feature phones/smartphones	Can't live without it	12.2	14.0	16.6	17.6	19.5	24.2	28.2	30.7	40.9	47.4	53.7
Feature phones/smartphones	Detailed information on topics I'm interested in	12.2	16.6	17.1	19.1	20.3	23.3	29.5	31.8	38.9	43.0	47.7
Feature phones/smartphones	Wide variety of information	12.6	15.2	15.6	22.3	23.1	22.8	32.6	33.6	37.2	37.6	46.7
Feature phones/smartphones	Essential for conversations with friends	9.2	9.8	14.9	14.0	14.3	18.3	21.9	25.7	28.6	33.4	46.6

2-2) Media reputation: Tokyo area

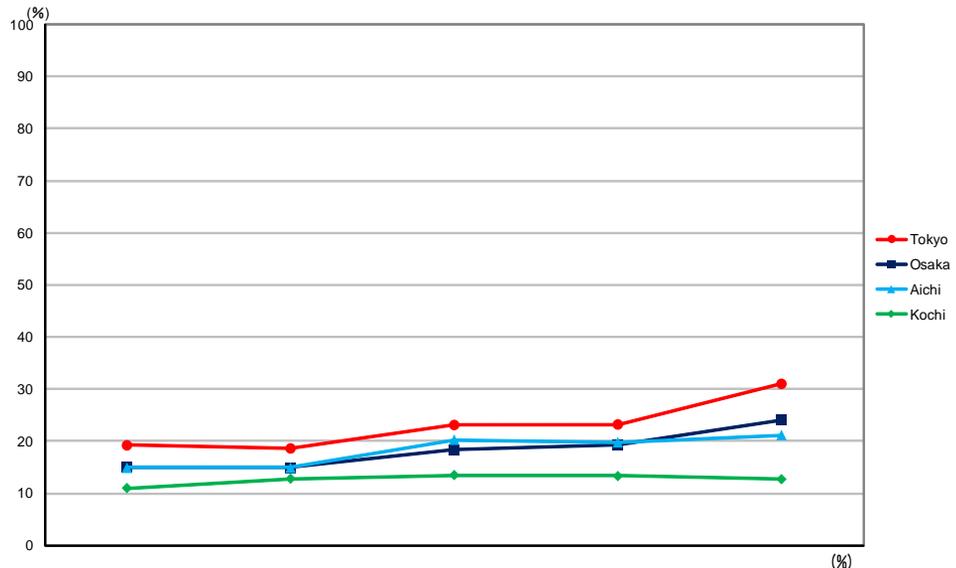
There were significant increases in the reputation of other forms of media as well over the past ten years. The percentage of respondents who see TV as having “clearly presented information” has gone from 58.9% in 2006 to 69.3% in 2016; radio as “responsive to reader/viewer perspectives” from 21.6% to 30.0%; newspapers as having a “clear position or message” from 38.1% to 48.3%; magazines as “stylish, sophisticated, or hip” from 22.5% to 30.8%; and computers as having “lots of original information” from 31.4% to 41.3%. These results point to the unique characteristics of each of these media categories.



Media category	Reputation	2006 (N=1,797)	2007 (N=1,949)	2008 (N=1,834)	2009 (N=2,236)	2010 (N=2,112)	2011 (N=2,127)	2012 (N=2,076)	2013 (N=1,899)	2014 (N=2,086)	2015 (N=1,844)	2016 (N=1,996)
TV	Clearly presented information	58.9	64.0	64.2	65.8	64.6	67.6	63.2	64.8	60.7	61.2	69.3
Radio	Responsive to reader/viewer perspectives	21.6	23.2	20.0	21.1	23.5	26.0	28.3	28.3	29.4	26.5	30.0
Newspaper	Clear position or message	38.1	37.0	33.9	36.4	35.3	43.0	39.4	43.6	34.4	33.5	48.3
Magazines	Stylish, sophisticated, or hip	22.5	27.3	24.2	26.8	29.6	32.1	27.6	24.3	23.8	24.5	30.8
Computers	Lots of original information	31.4	35.6	32.7	38.5	37.7	41.1	41.5	41.1	34.9	34.4	41.3

2-3) Percentage of televisions connected to the internet: All four areas

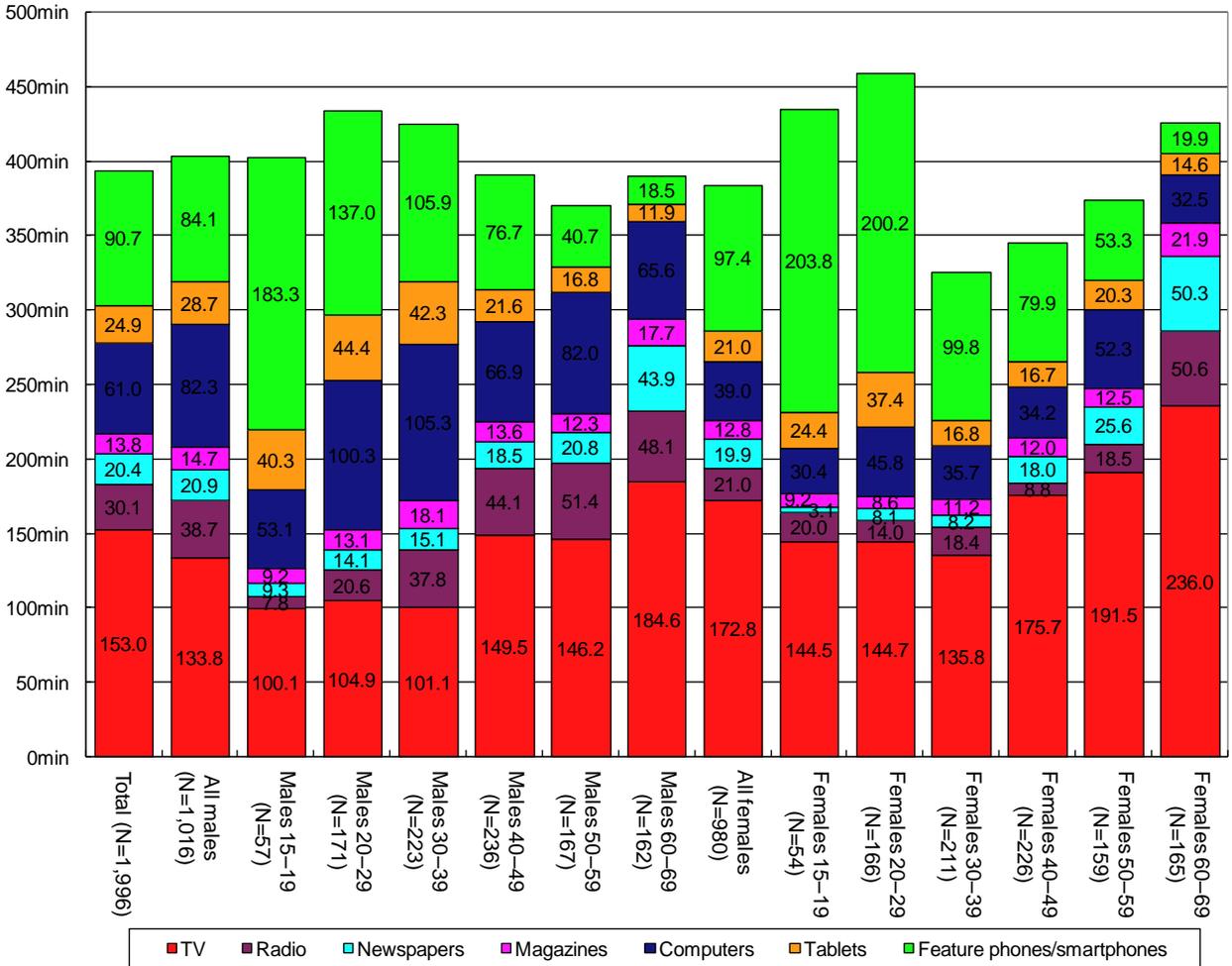
The percentage of televisions connected to the internet was around 20% when this indicator was first measured in 2012, but went up nearly eight percentage points this year to exceed 30% for the first time at 31.0%.



	2012	2013	2014	2015	2016
Tokyo	(N=2,076) 19.2	(N=1,899) 18.6	(N=2,086) 23.1	(N=1,844) 23.2	(N=1,996) 31.0
Osaka	(N=1,712) 15.0	(N=1,615) 14.9	(N=1,636) 18.3	(N=1,693) 19.2	(N=1,557) 24.1
Aichi	(N=1,711) 14.9	(N=1,596) 14.9	(N=1,619) 20.3	(N=1,538) 19.8	(N=1,705) 21.2
Kochi	(N=1,691) 11.0	(N=1,537) 12.8	(N=1,538) 13.5	(N=1,568) 13.3	(N=1,579) 12.7

Annual Media Consumption Report 2016: Data

Total daily media contact time by age and gender (weekly averages, 2016): Tokyo area



Smartphone and tablet ownership by age and gender (2016): Tokyo area

