

May 28, 2018

Time Series Analysis Findings from the Annual Media Consumption Report 2018

1. Total media contact time at a record high 396.0 minutes, thanks to increased digital media contact time.
2. Digital media's share of all media contact exceeds 50% for the first time, at 50.4%.
3. Feature phones/smartphones tops media reputation in "essential for conversations with friends," "it's a habit," and "useful." (Of the 42 media reputation items, feature phones/smartphones ranked No. 1 in 17, the most of any of the media)

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. Here we report on changes in the media environment uncovered by time-series analysis of media contact time and media reputation.

All figures for the Tokyo region

1. Media contact time is at a record high 396.0 minutes, thanks to increased digital media contact time.

Total daily media contact time (weekly average) is higher than ever at 396.0 minutes, 18.0 minutes more than last year. There were large increases in the digital media feature, namely feature phones/smartphones (up 12.9 min.), computers (up 7.3 min.), and tablets (up 4.9 min.), while contact with the mass media dropped, except magazines (up 0.4 min.). Computer contact time had been decreasing year by year since its peak of 81.7 minutes in 2011, but increased for the first time in seven years to 66.6 minutes. At 103.1 minutes, contact with feature phones/smartphones topped 100 minutes in for the first time.

2. Digital media's share of all media contact exceeds 50% for the first time, at 50.4%.

The percentage of all media contact accounted for by digital media (total for computers, feature phones/smartphones and tablets) is 50.4, topping 50% for the first time since survey began. The share of mobile devices (total for feature phones/smartphones, tablets) has been growing year by year, and at 33.6% has now exceeded 1/3 of all media contact.

3. Feature phones/smartphones tops media reputation in "essential for conversations with friends," "it's a habit," and "useful."

In media reputation, feature phones/smartphones surged. The percentage of respondents who say "it's a habit" rose 5 points (59.1% in 2017 to 64.1% in 2018). "Essential for conversations with friends" rose 6.2 points (45.0% in 2017 to 51.2% in 2018), bettering TV, and "has useful information" rose 2.3 points (46.3% in 2017 to 48.6% in 2018), overtaking computers and TV to take top spot. Feature phones/smartphones topped 17 of 42 media reputation items, the most of any of the media.

■ **Survey design**

Survey area: Tokyo, Osaka, Aichi and Kochi prefectures

Sampling method: Random Digit Dialing (RDD) (including some survey monitors extracted by RDD)

Survey method: Postal survey

Subjects: Males and females aged 15–69

Sample configuration: 2,513 samples in four areas (641 from Tokyo, 627 from Osaka, 627 from Aichi, 618 from Kochi)

Age and gender groups weighted according to the FY 2017 Basic Resident Register

Survey period: January 25–February 9, 2018

Conducted by: Video Research Ltd.

Media contacts:

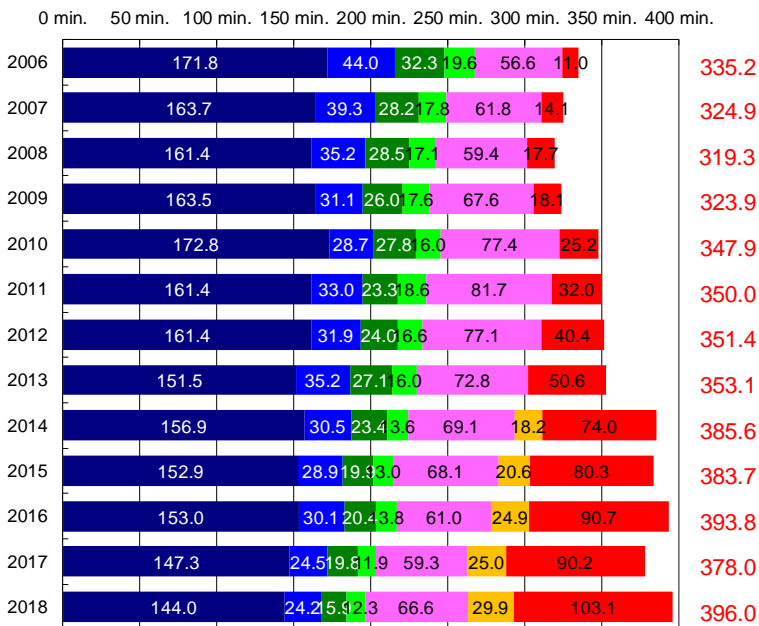
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■ Time series analysis of the Annual Media Consumption Report

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

The annual Media Consumption Report 2018 found a total daily media contact time of 396.0 minutes (weekly average), an increase of 18.0 minutes since last year. There were large increases for the digital media feature phones/smartphones (up 12.9 min.), computers (up 7.3 min.), and tablets (up 4.9 min.), and while contact with magazines rose slightly (up 0.4 min.). It dropped for TV, radio, and newspapers. Computers rose for the first time in seven years, to 66.6 minutes. At 103.1 minutes, contact with feature phones/smartphones topped 100 in for the first time.

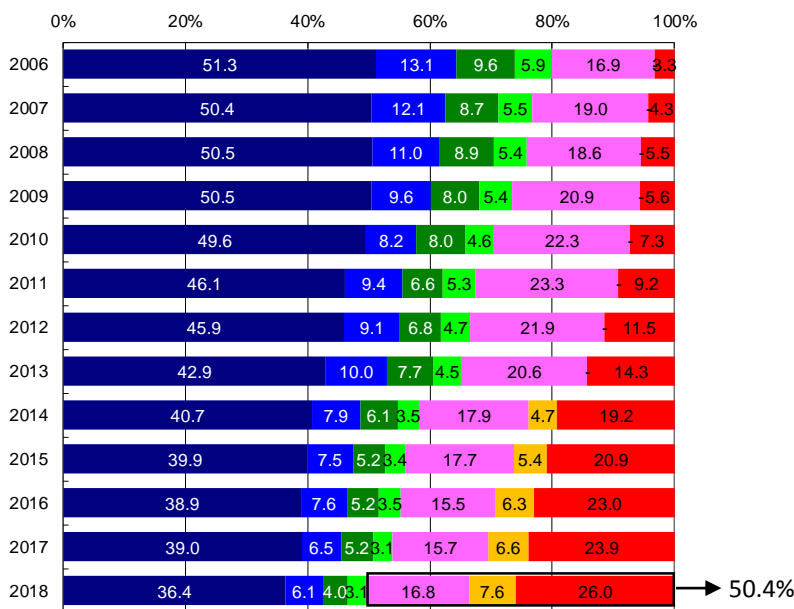


■ TV ■ Radio ■ Newspapers ■ Magazines ■ Computers ■ Tablets ■ Feature phones/smartphones

From 2014 "Tablets" was added. "Internet via PC" was changed to "Computers" and "Internet via mobile phones (including smartphones)" was changed to "Mobile phones (including smartphones)."
Total media contact time means total contact time of all respondents who had contact with each of the media.

2. Daily contact time by media category (weekly averages): Tokyo area

The percentage of total media time accounted for by digital media (total for computers, feature phones/smartphones, tablets) has been growing each year. For the first time since the survey began, digital accounted for over half of media contact, at 50.4%, led by mobile media (total for feature phones/smartphones and tablets), which accounted for one third, at 33.6%.



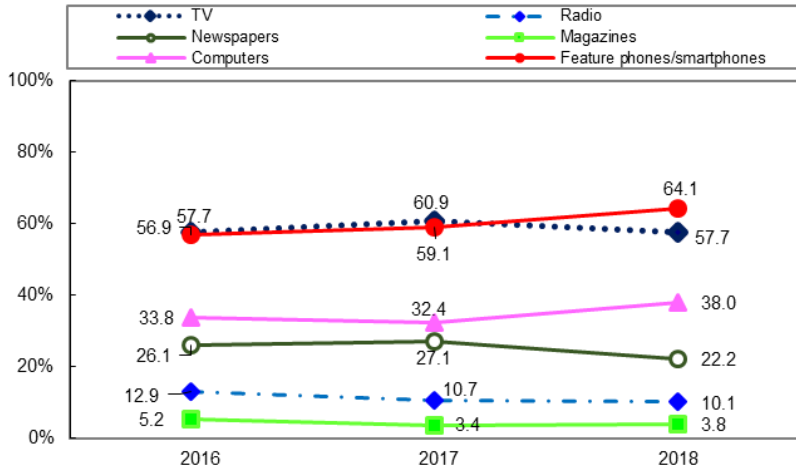
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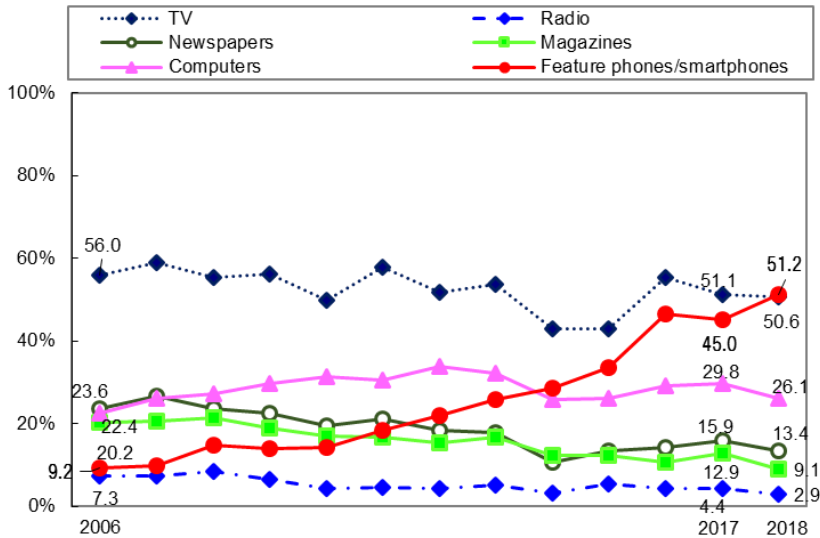
3-1. Media reputation: Tokyo area

In media reputation, feature phones/smartphones came out top in three new items. It bettered TV in both "it's a habit" (59.1% in 2017 to 64.1% in 2018) and "essential for conversations with friends" (45.0% in 2017 to 51.2% in 2018), and bettered computers and TV in "has useful information" (46.3% in 2017 to 48.6% in 2018). Feature phones/smartphones topped 17 of 42 media reputation items, the most of any of the media.

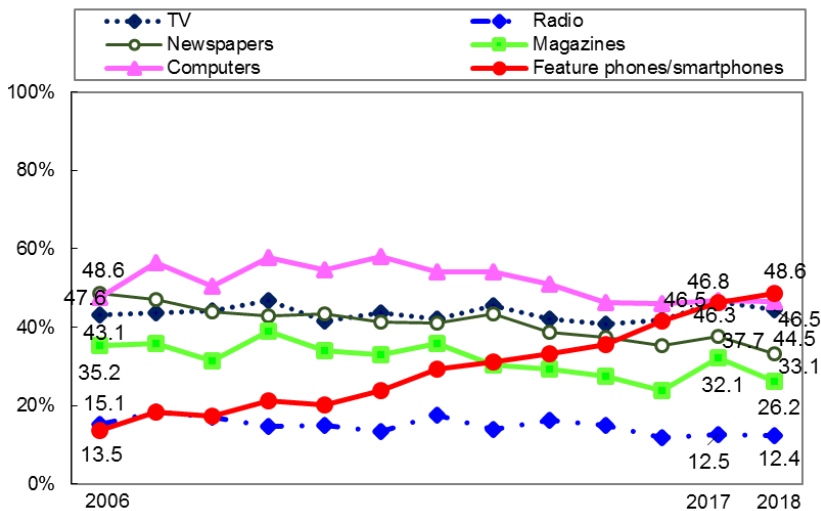
It's a habit



Essential for conversations with friends



Has useful information

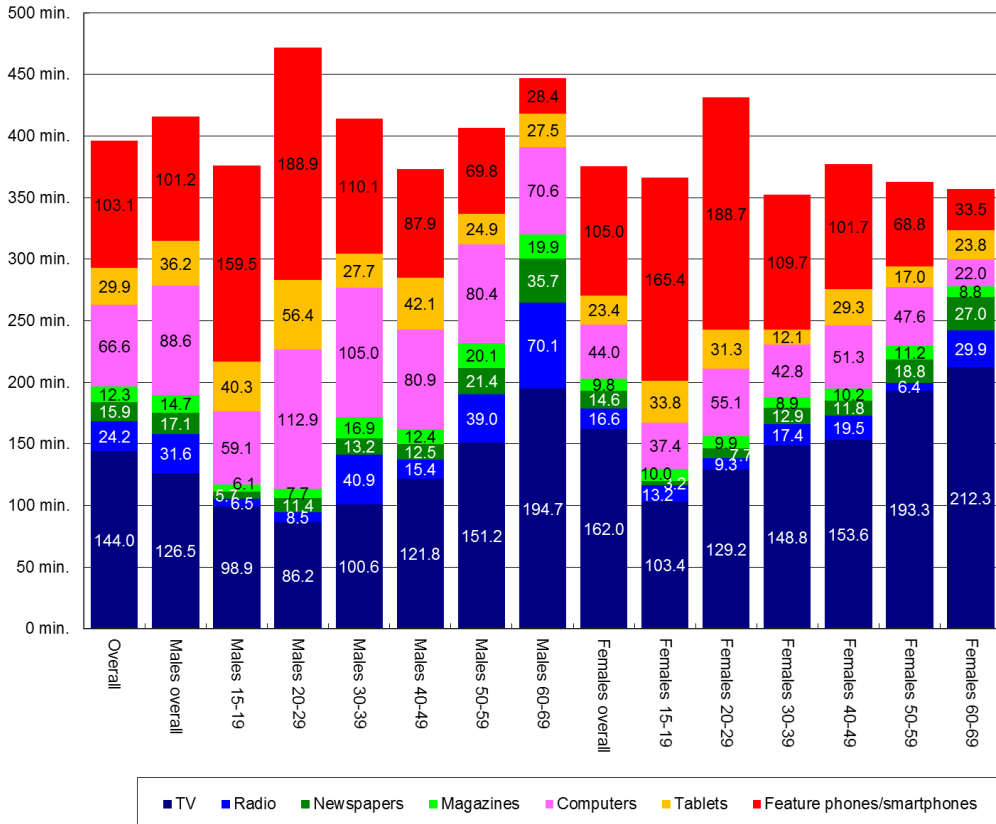


3-2. The 17 items in which feature phones/smartphones came in at No. 1

	(%)
1 Can come across information quickly	75.6
2 Watch, listen or read it when I have a spare minute	74.5
3 Can find things out quickly	72.4
4 Up-to-the-minute, new information	71.2
5 Use it to get new information	64.5
6 It's a habit	64.1
7 Can't live without it	61.1
8 Can find information I want	60.1
9 Feels pioneering/innovative	55.2
10 Essential for conversations with friends	51.2
11 Provides information I want to try out right away	49.8
12 Has lots of useful information	48.6
13 Can come across something new	48.4
14 Has lots of original information	47.4
15 Active/growing	45.9
16 Want to reduce the time I use it	40.6
17 Makes me feel I participated, too	24.9

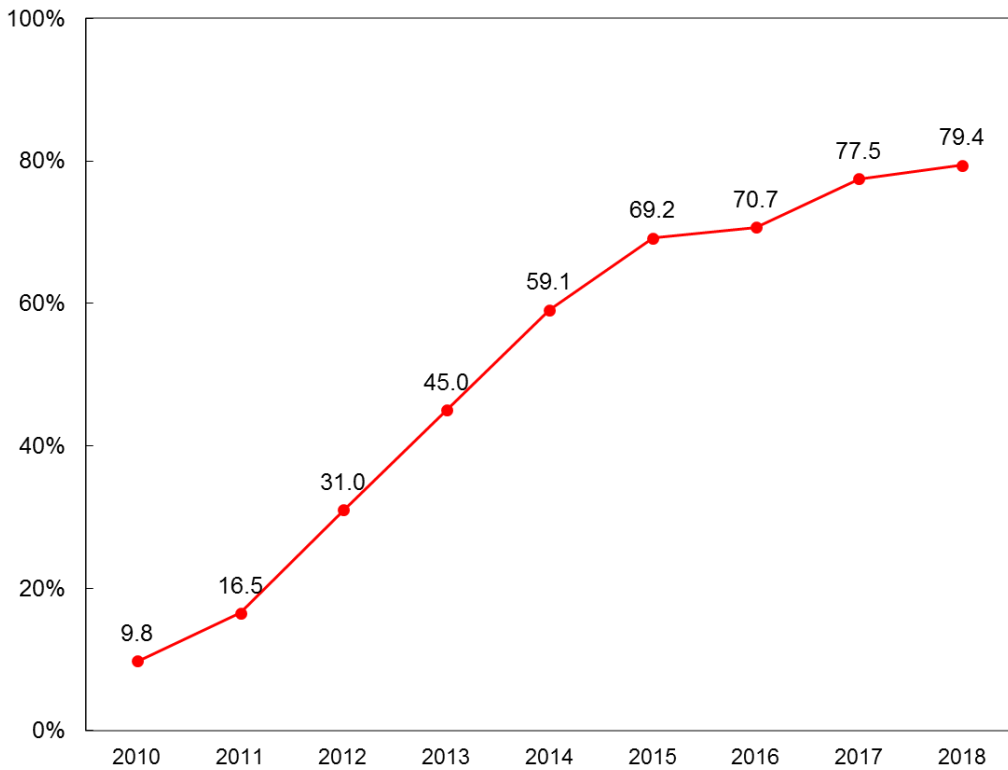
■ Annual Media Consumption Report 2018 primary survey results

○ Daily media contact by gender and age group (weekly averages): Tokyo area



■ Annual Media Consumption Report 2018 primary survey results

○ Smartphone ownership: Tokyo area



○ Smartphone ownership by gender and age group: Tokyo area

