



Hakuhodo DY Media Partners Inc. "Time Series Analysis Findings from the Annual Media Consumption Survey 2021"

- **Total media engagement time increased significantly to 450.9 minutes, a record high**
- **Use of subscription video streaming services was close to 50% at 46.6%, up 9.7 points from previous year**
- **Over 20% of consumers consider video viewing as TV viewing, expanding the notion of "watching TV"**

Hakuhodo DY Media Partners Inc, Institute of Media Environment (Head office: Minato-ku, Tokyo; Director: Makoto Shimano) has conducted "the Annual Media Consumption Survey" annually since 2006, from late January to early February, to capture the current state of media engagement among consumers. Based on a time-series analysis of media engagement time and consumer media awareness, we report on changes in the media environment

※All figures are for the Tokyo area

① **Total media engagement time increased significantly to 450.9 minutes, a record high**

Total media engagement time increased by 39.2 minutes from last year to a record high of 450.9 minutes (daily/weekly average) This was the largest increase since the start of the survey. Increases in engagement with mobile phones/smartphones were up 18.0 minutes from last year, tablets were up 9.7 minutes, and computers were up 8.4 minutes. The sum of "mobile phones/smartphones," "tablets," and "computers" accounted for 55.2% of the total, which was a significant increase. TV engagement time increased by 5.8 minutes, returning to the same level as in 2019.

② **Use of subscription video streaming services was close to 50% at 46.6%, up 9.7 points from last year**

The use of subscription video streaming services increased by 9.7 percentage points over the year to reach 46.6%, close to 50%. Growth has been rapid, even before the COVID-19 pandemic, with usage up 18.8 percentage points from 2019, two years ago. The Internet access rate for TV is also close to 50% at 45.8% (up 5.3 percentage points from last year). One in four people (25.5%, up 9.0 points from last year) now own a streaming device that allows them to watch videos on TV. The media environment surrounding TV is changing dramatically.

③ **Over 20% of consumers consider video viewing as TV viewing, expanding the notion of "watching TV"**

When asked what they did during their TV time (③-1), both watching paid videos content (up 8.4 points from last year) and free videos content (up 3.6 points) increased, exceeding 20%. The number of consumers who consider video viewing as TV viewing has increased, and the notion of "watching TV" has expanded.

To examine the change in consumer's awareness and attitudes toward media, 63 items related to awareness and attitudes were ranked by the difference in scores between last year and this year. "I want to see the information and content I like, when I want to" changed the most, increasing by 6.3 points from last year to over 60%. The number of contents provided has increased dramatically with the enrichment of subscription video distribution services, etc. Therefore, it can be said that an environment has been created where consumers engage with media whenever and anywhere they want.

■ Survey Details ■

Survey Area: Tokyo, Osaka

Sampling Method: RDD (Random Digit Dialing)

Research Method: Postal Survey

Target Demographic: males and females aged 15-69

Sampling Composition: 2 districts 962 responses (Tokyo 647, Osaka 315), Age and gender weighting based on the 2020 Basic Resident Register

Research Period: January 21, 2021 to February 5, 2021

Research Agency: Video Research Co., Ltd

■ Contact ■

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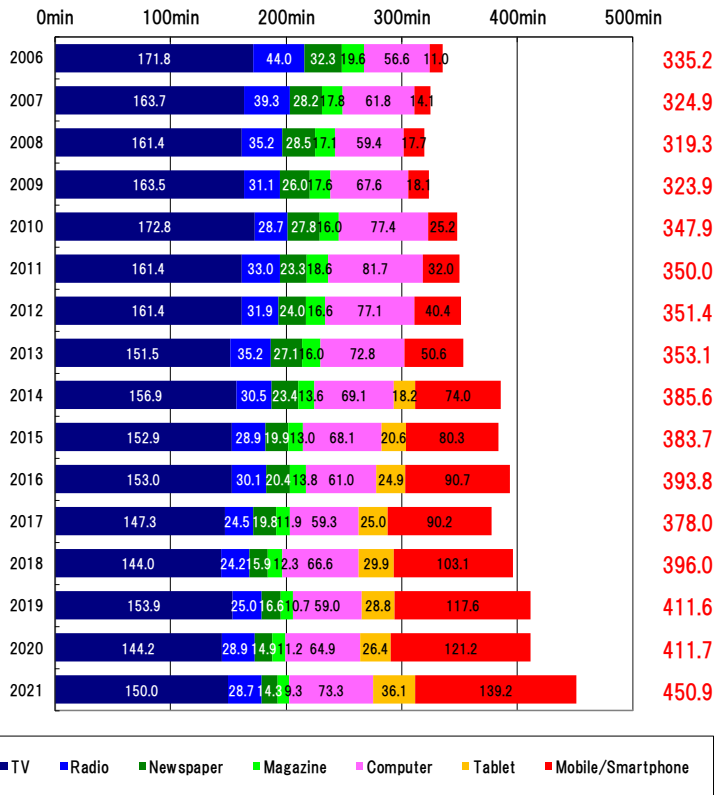
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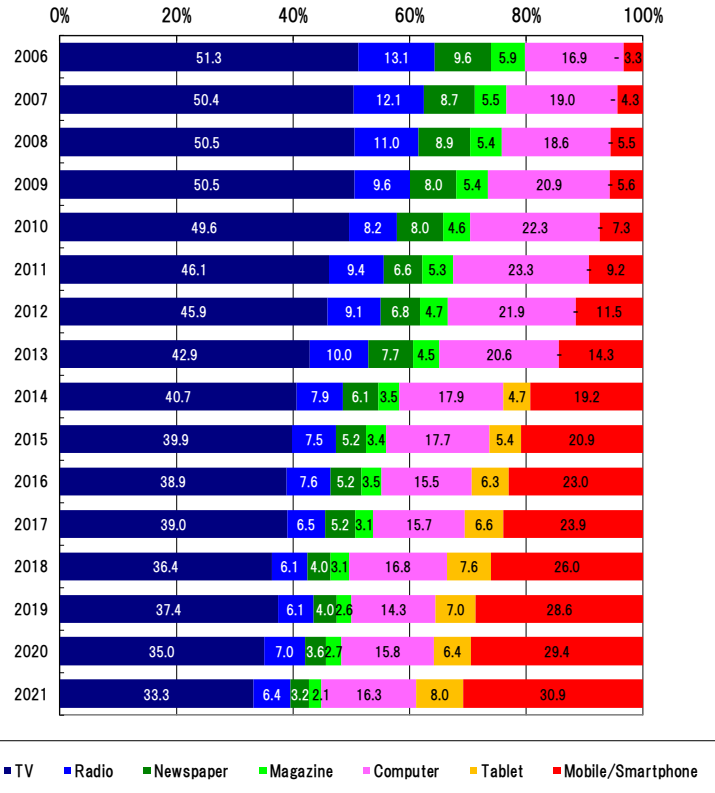
①-1 Total Media Engagement Time -Time Series Trends (daily/weekly average) : Tokyo

Q. How much time do you spend watching or using each of the following information media, both inside and outside your home?



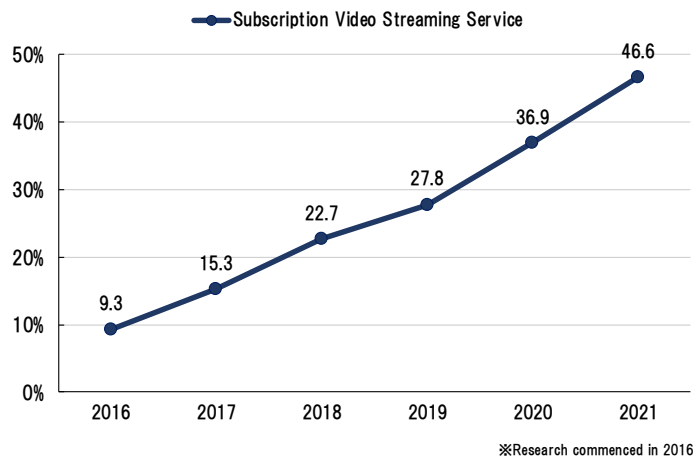
Total media engagement time is the sum of the contact time for each media. Engagement time for each media device is calculated from valid responses (excluding those that are unknown). From 2014, "internet on personal computers" was changed to "computer" and "internet on mobile phones (including smartphones)" was changed to "mobile/smartphone".
 ※Research on tablet usage commenced in 2014

①-2 Composition of Total Media Engagement Time – Time Series Trends : Tokyo

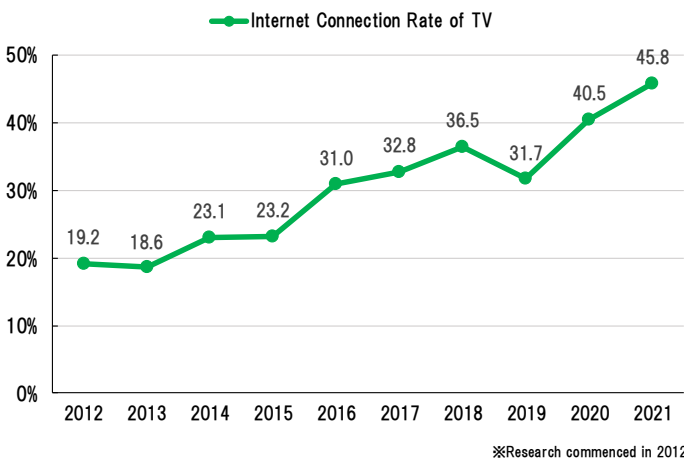


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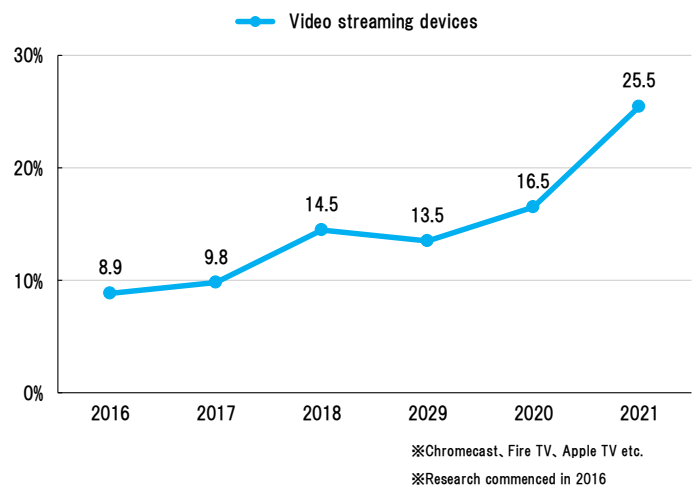
②-1 Video Streaming Service Subscription Rates – Time Series Trend



②-2 Internet Connection Rate of TV - Time Series Trend



②-3 Ownership Rate of Video Streaming Devices – Time Series Trend



③-1 Specific Types of Usage Included in TV Usage Time

Q. What specific types of use do you include in your "TV" usage time? Please select all that apply.

Types of usage	2020	2021
Watch TV programs in real time as broadcast	84.3	87.6
Watch recorded TV programs	73.0	72.5
Watch a missed-program on TV program catch-up service ※1	11.3	15.3
Watch paid videos content ※2	13.4	21.8
Watch free videos content ※3	19.0	22.6
Watch internet television ※4	5.0	4.7
Watch TV shows on social networking sites ※5	4.4	5.4
Watch other content	2.9	1.6

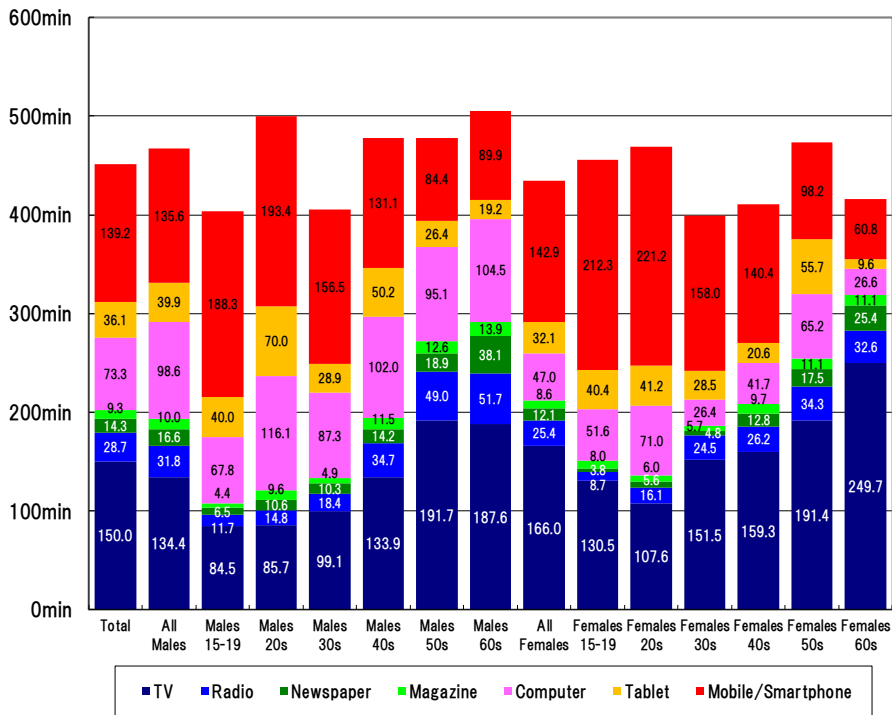
※1 TVer, NHK On Demand, etc.
 ※2 Netflix, Hulu, Amazon Prime Video, dTV, DAZN, etc.
 ※3 YouTube, Niconico Video, Dailymotion, FC2 Video, GYAO!, etc.
 ※4 ABEMA, etc.
 ※5 Facebook, Twitter, LINE, Instagram, etc.

③-2 TOP5 Changes in Awareness and Attitudes Toward Media (differences between 2020 and 2021)

No.	Awareness and Attitudes Toward Media	2020 (%)	2021 (%)	Differences (point)
1	I want to watch content/information that I like, when I like	57.4	63.7	6.3
2	More opportunities to watch and stream live videos on SNS	14.4	20.2	5.8
3	The first thing I touch is my smartphone after I wake up in the morning	53.1	58.9	5.8
4	I have no resistance to voice communication with home appliances, smart speakers, etc.	17.7	22.8	5.1
5	I have checked the reputation of a product I was interested in on my smartphone, at a store.	57.9	62.7	4.8

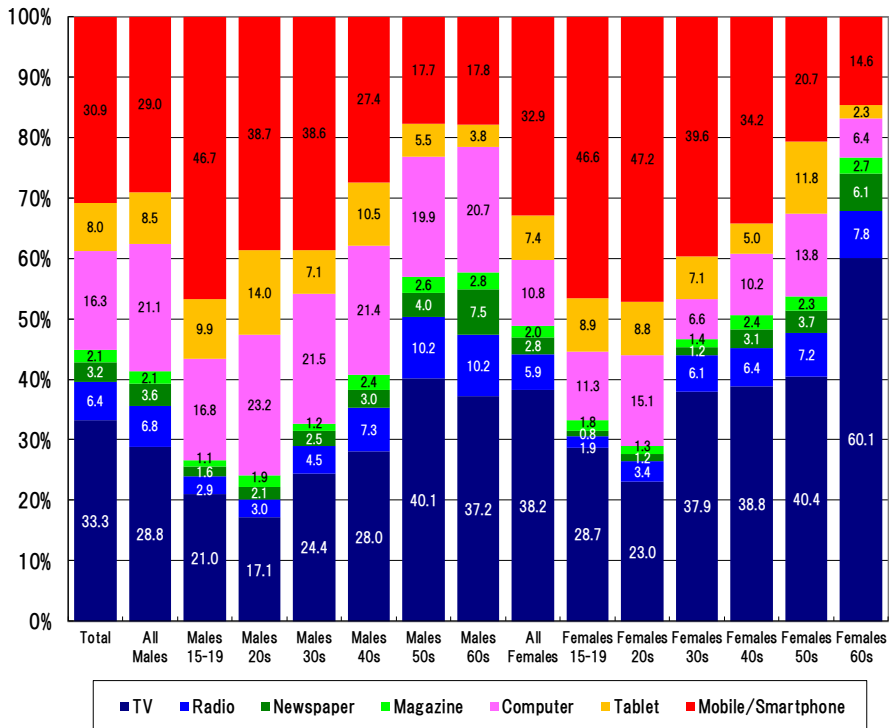
Annual Media Consumption Survey 2021 Materials

Total Media Engagement Time by Age and Gender (daily/weekly average): Tokyo



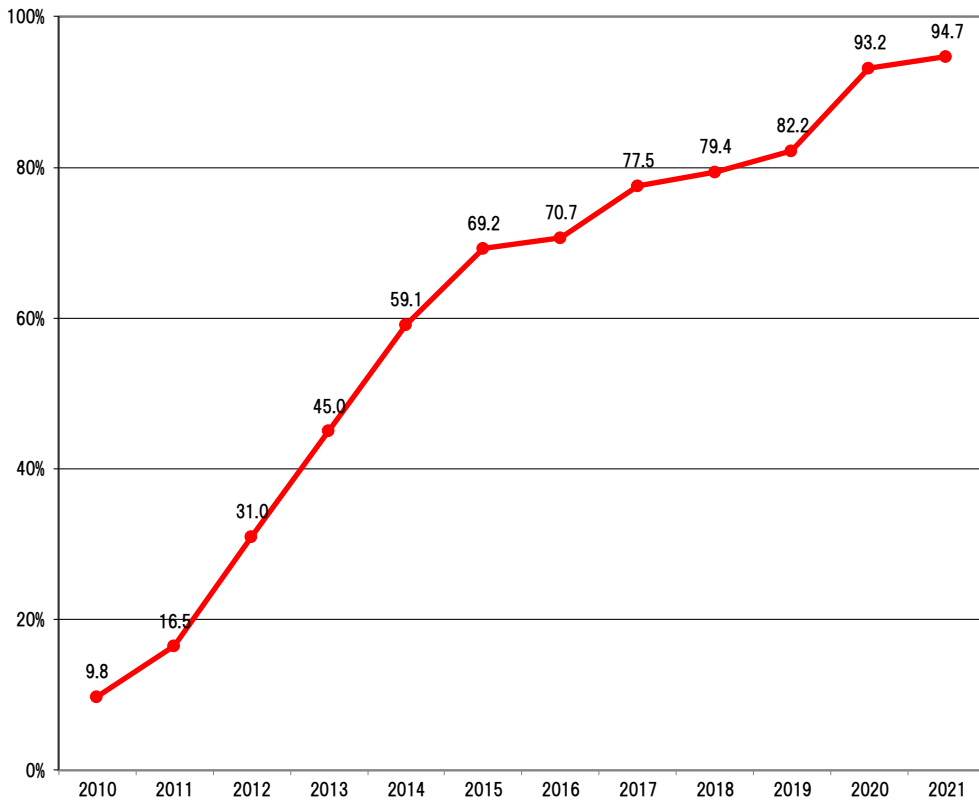
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Composition of Total Media Engagement Time by Age and Gender: Tokyo



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○ **Smartphone Ownership - Time Series Trends: Tokyo**



○ **Smartphone Ownership 2021 by Age and Gender: Tokyo**

