



NEWS RELEASE

To all media

July 7, 2015

Hakuhodo DY Media Partners Inc.

Hakuhodo DY Media Partners Annual Media Consumption Report 2015 Time Series Analysis

1. Total media daily contact time was 383.7 minutes. Media contact through “mobile/smartphone” and “tablet” comprised more than a quarter of the total time.
2. Heavy media users (more than six hours a day) account for nearly half of all users.
3. “Smartphone” and “tablet” users both spend about the same amount of time “watching videos”, “searching”, and “shopping” with their devices.

Since 2006, Hakuhodo DY Media Partners Institute of Media Environment, located in Minato-ku, Tokyo and headed by Masaki Mikami, has conducted the Annual Media Consumption Report designed to survey *sei-katsu-sha* media contact points with the current survey design. For this year’s survey, the Institute performed a time series analysis. This analysis revealed the following about how *sei-katsu-sha* media contact has changed.

1. Total media contact time was 383.7 minutes. Media contact through “mobile/smartphone” and “tablet” accounts for more than a quarter of the time.
 - Total daily media contact time of 383.7 minutes in 2015 was approximately the same as the 380 minutes recorded in last year’s survey. “Mobile/smartphone” and “tablet” usage is increasing, while other contact points slightly declined.
 - Since 2006, only contact time through “mobile/smartphone” has increased every year, and this year the combined contact time of “mobile/smartphone” and “tablet” exceeded a quarter of the total for the first time.
 - Smartphone ownership rate (Tokyo) is approaching 70%, and tablet ownership (Tokyo) has increased from last year’s 20% to close to 30% this year.
2. Heavy media users (more than six hours a day) account for almost half of all users.
 - Heavy media users (more than six hours a day) have risen by more than 10 points from less than 40% in 2006 to 49.6% this year, nearly half of all users.
 - Among heavy media users, those having a contact time of over 10 hours have increased from 5.3% in 2006 to 11.3% in 2015.
3. “Smartphone” and “tablet” users both spent about the same amount of time “watching videos”, “searching”, and “shopping”.
 - “Smartphone” and “tablet” usage is about the same for “watching videos” (smartphone: 64.5%, tablet: 65.1%), “searching” (smartphone: 91.9%, tablet: 87.6%), and “shopping” (smartphone: 42.8%, tablet: 38.0%).

■ Survey design

Survey area: Tokyo, Osaka, Aichi, Kochi Prefectures

Sampling method: RDD (Random Digit Dialing)

Survey method: Postal survey

Survey subjects: Men and women aged 15 to 69

Survey sample makeup: 2,504 sample size (Tokyo: 620, Osaka: 632, Aichi: 637, Kochi: 615) in the 4 regions in total;

Age and gender groups weighted according to the FY2014 Basic Resident Register

Survey period: January 30 to February 12, 2015

Survey conducted by: Video Research Ltd.

■ For more information contact:

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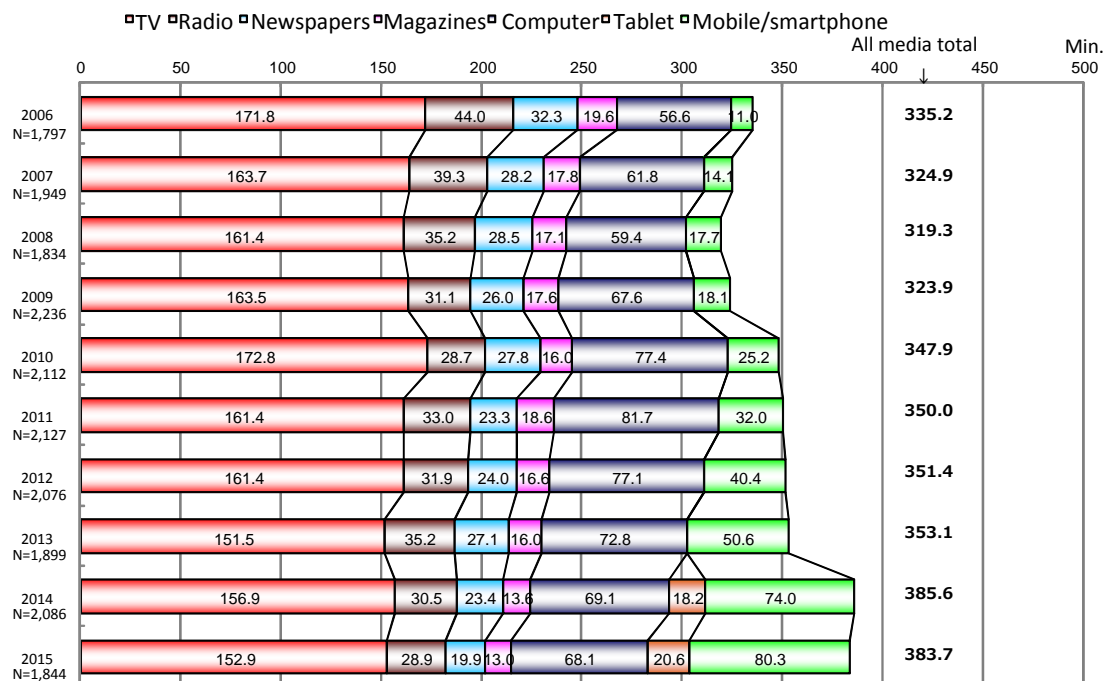
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1.1 Series trends in media total contact time (weekly averages of daily use): Tokyo region

Total media contact time in 2015 was 383.7 minutes, about the same as the 380 minutes in 2014. Looking back on the data, digital media has shown remarkable growth while mass media contact time has decreased. A look at digital media by type shows that “Personal computer” peaked in 2011 and then started to decline, while the “Mobile/smartphone” category has steadily increased. This indicates that the shift to mobile media is gaining momentum.



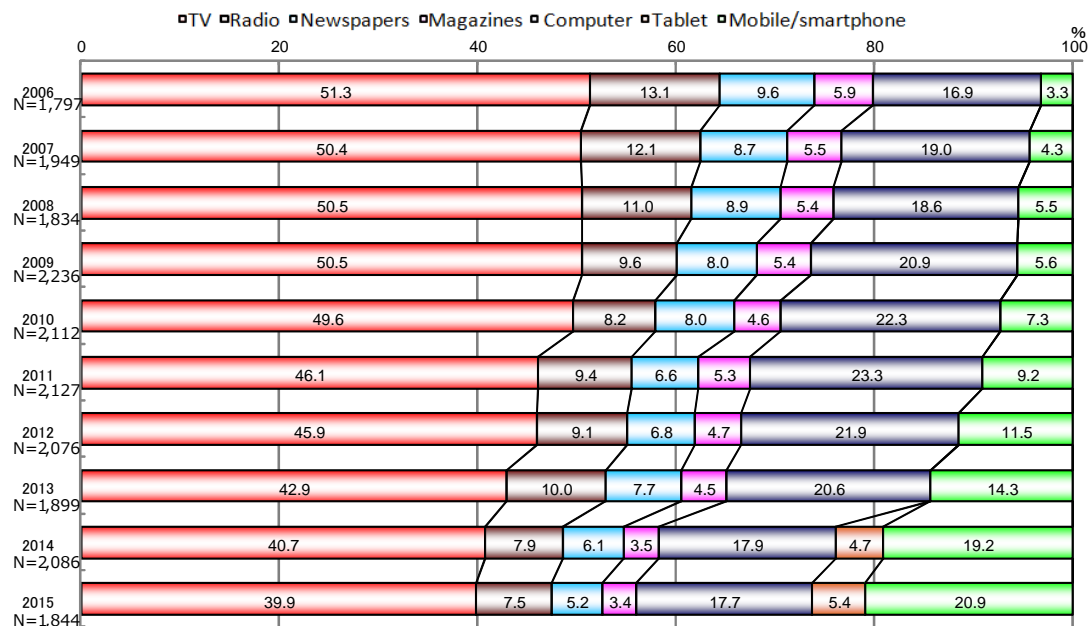
*In 2012, smartphones were added to the “mobile phone” category and the category was renamed “mobile phone/smartphone”.

*The “tablet” category was added in 2014.

*In 2014 the “access Internet via computer” category was changed to “computer”, and the “access Internet via mobile/smartphone” category was changed to “mobile/smartphone”.

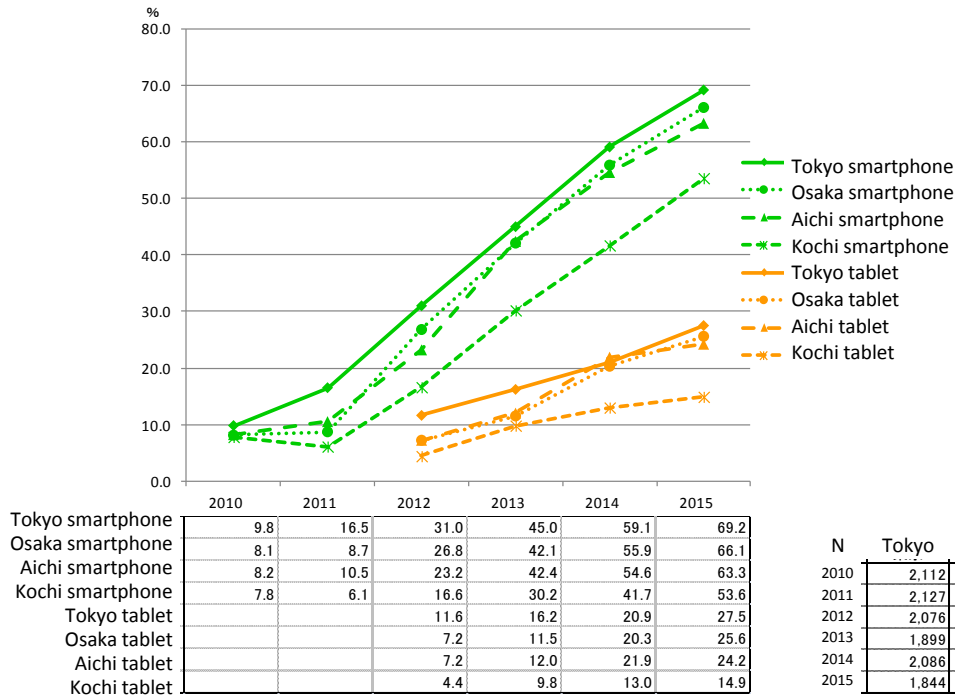
1.2 Distribution of contact time by media category, time series trends (weekly averages of daily use): Tokyo region

The share of digital media in the total media contact time has increased every year. Among digital media, the growth of “mobile/smartphone” has been especially rapid, and the share for “computer” was surpassed by “mobile/smartphone” last year. This year, “mobile/smartphone” and “tablet” were a combined 26.3%, accounting for more than a quarter of the total for the first time.



1.3 Smartphone/Tablet ownership time series trends: four regions

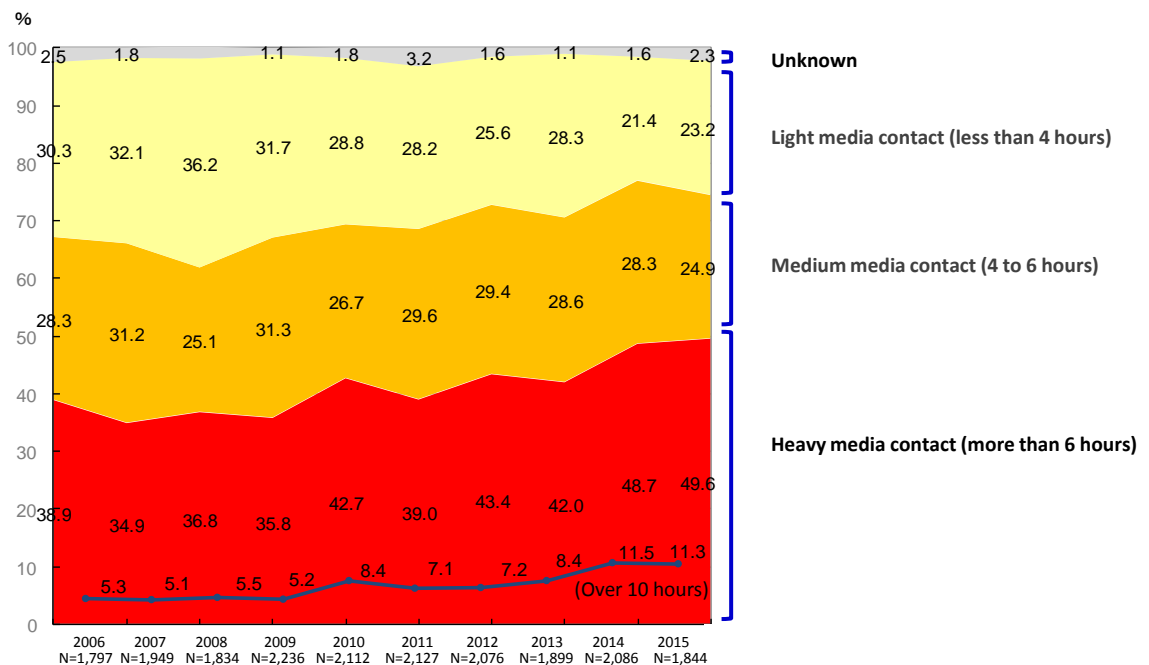
Over a five-year period, smartphone ownership has experienced a remarkable seven-fold increase. In 2015, ownership in the Tokyo region is 69.2%, nearly 70%. Tablet ownership is also steadily increasing and is about 30% in the Tokyo region.



N	Tokyo	Osaka	Aichi	Kochi
2010	2,112	1,663	1,678	1,648
2011	2,127	1,736	1,664	1,595
2012	2,076	1,712	1,711	1,691
2013	1,899	1,615	1,596	1,537
2014	2,086	1,636	1,619	1,538
2015	1,844	1,693	1,538	1,568

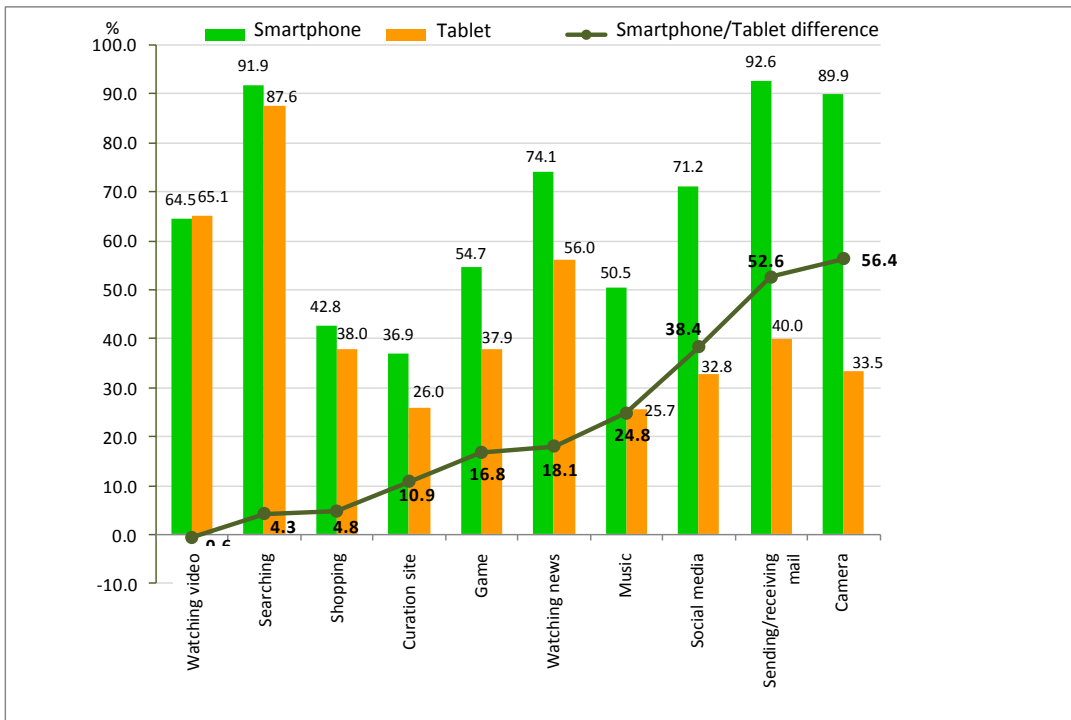
2. Time series trends in the component ratio of media total contact time (weekly averages of daily use): Tokyo region

When daily use (weekly average) is divided into the three categories of “light media contact (less than 4 hours)”, “medium media contact (between 4 and 6 hours)”, and “heavy media contact (more than 6 hours)”, since 2006, “heavy media contact” has increased more than 10 points to reach 49.6% this year, nearly half of the total. Among heavy media contact users, those with more than 10 hours of daily media contact have more than doubled from 5.3% in 2006 to 11.3% in 2015. Moreover, “light media contact”, which was over 30% in 2006, has declined to just over 20% this year.



3.Smartphone/tablet usage and difference in usage by activity (2015): Tokyo region

Smartphone and tablet usage and the difference in usage between the two when activities are ranked starting with the smallest difference shows that usage for the three categories “watching videos”, “searching”, and “shopping” is about the same.

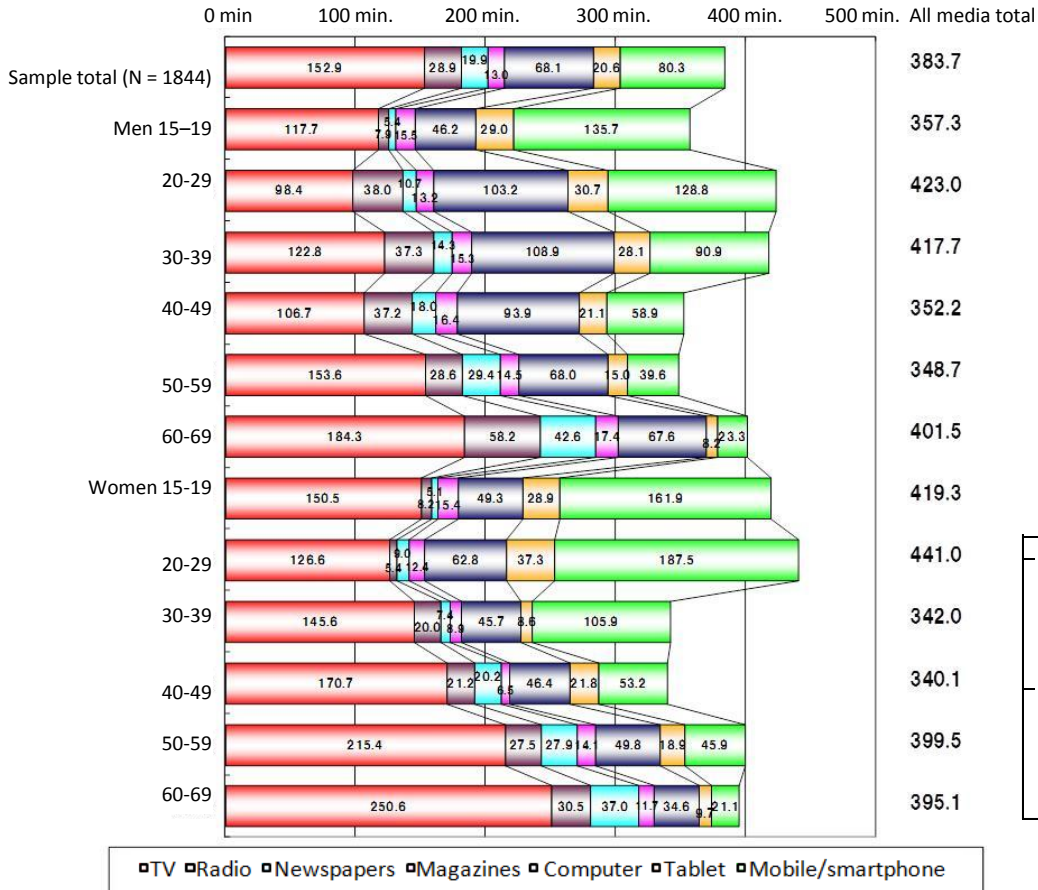


Owner base: Smartphone N = 1,275
Tablet N = 507

- * Smartphone and tablet difference = [Smartphone use %] – [Tablet use %]
- * “Social media” refers to Facebook, Twitter, LINE, etc.
- * “Curation site” refers to NAVER Matome and other curation platforms.
- * “Watching news” refers to Yahoo! and other news sites.

■ Annual Media Consumption Report 2015 material

● Total media contact by gender and age group (weekly averages of daily use for 2015): Tokyo region



● Smartphone and tablet ownership by gender and age group (2015): Tokyo region

