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Hakuhodo DY Media Partners Inc.

**Total Media Contact Time on Par with Last Year at 350 Minutes;
Online Media Contact Time Continues to Increase
2011 Fixed-point Media Survey by Hakuhodo DY Media Partners' Institute of
Media Environment**

Hakuhodo DY Media Partners' Institute of Media Environment has completed its 2011 Fixed-point Media Survey, which analyzes how *sei-katsu-sha* are interacting with media. The research institute is headquartered in Minato-ku, Tokyo and headed by Hiroshi Yoshida.

According to survey data collected in the Tokyo area, the total amount of time that *sei-katsu-sha* spend in contact with the four types of mass media and two types of online media (personal computers and mobile/smartphones) averages five hours and fifty minutes per week. This figure had been declining through 2008, but showed a turnaround in 2009. The 2011 results are on par with those of the previous year. At the same time, there has been a noticeable increase in the amount of online contact time via personal computers and mobile phones.

Online contact time via personal computers started to decline in 2008, but returned to its upward trend the following year. Time spent online via mobile phone has been increasing substantially, more than doubling in the four years since 2007. One of the reasons for the increase is more time spent using video posting and viewing services, shopping online, or posting on Twitter and other mini-blog services. In 2010, 47.2% of women in their 20s reported using a mini-blog service, and in 2011 that number had jumped to 70.7%. The increasing prevalence of smartphones has had a major impact on this trend.

In 2011, 16.5% of those surveyed owned a smartphone, up from 9.8% in 2010. In terms of age categories, more 35% of men in their 20s and 30s and 22% of women in their 20s had a smartphone. More men in their 20s—68.6%—reported wanting a smartphone than any other group, but the numbers were high across all age and gender categories.

With total media contact time close to six hours—a quarter of a day—there is little chance of this figure increasing further. However, as *sei-katsu-sha* interact with media

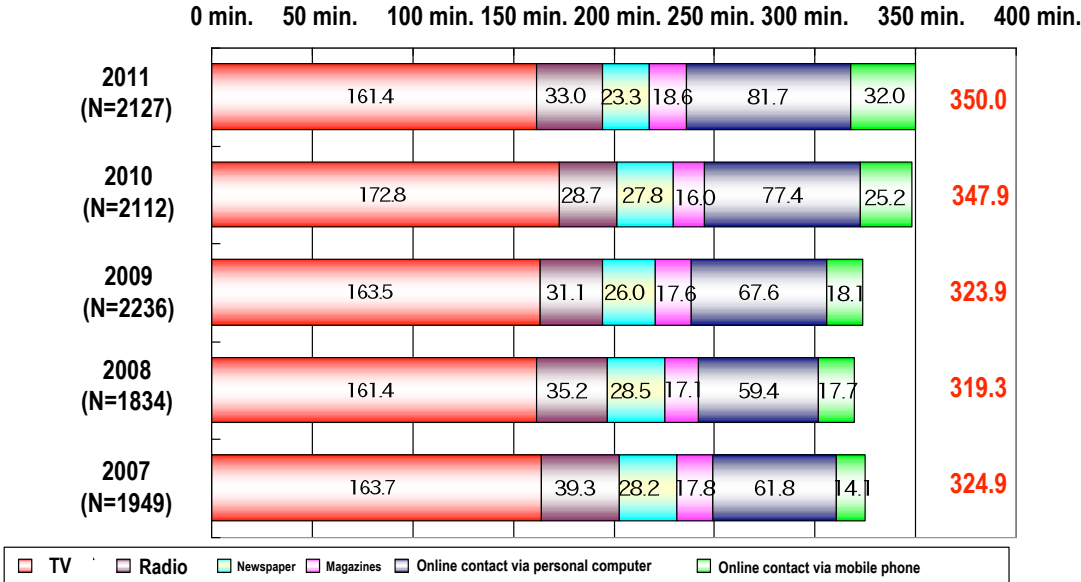
in increasingly diverse ways, the use of double or triple screens (in other words, simultaneous interaction with TV and the internet via computer or mobile/smartphone devices) is predicted to continue increasing.

The Fixed-point Media Survey identifies how *sei-katsu-sha* actually interact with the new hardware and software products continually appearing on the scene in the age of digital media. The yearly survey has been the cornerstone of activities at the Institute of Media Environment since 2004, as it aims to discover signs and trends indicating the shape of the advertising media market.

The Institute of Media Environment will continue to research changes in the media environment in order to identify clues that point to what next-generation advertising will look like, striving to boost communication planning skills and positive media outcomes.

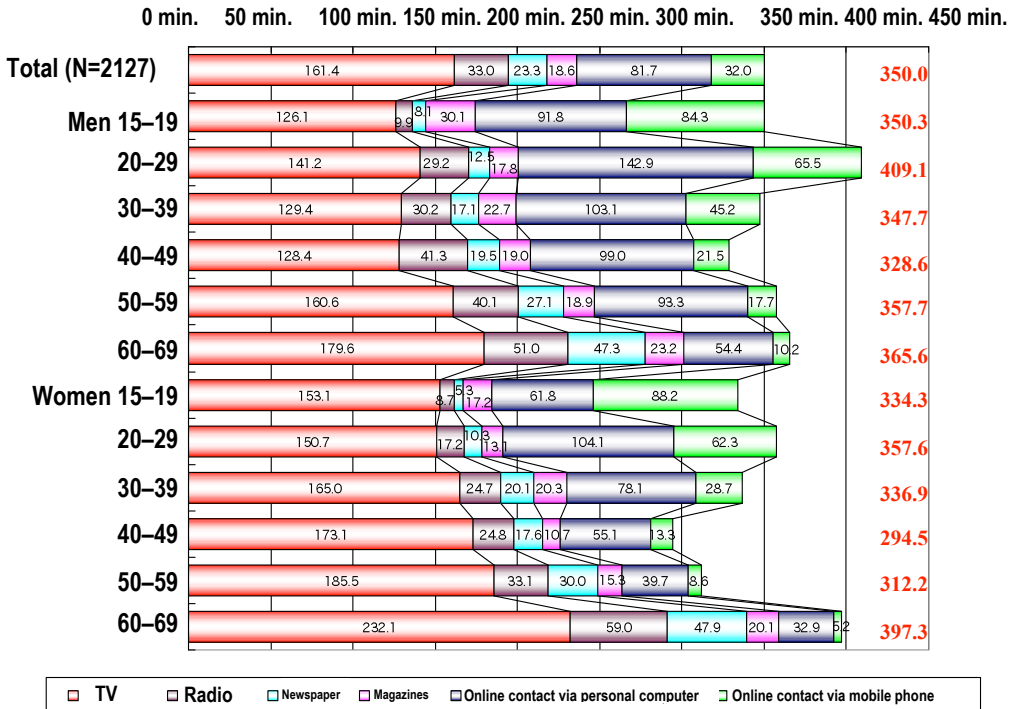
▪ **Primary survey results (sample data from the Tokyo area)**

1) Total daily contact with the four types of mass media and the internet (weekly averages)



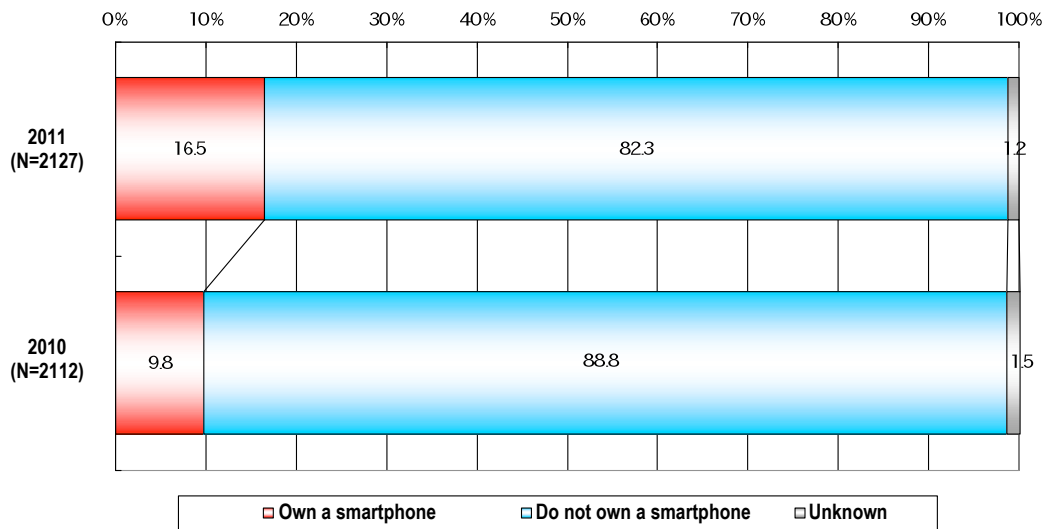
- Total media contact time remains nearly the same as the previous year
 - The amount of time spent online via personal computers and mobile devices is increasing
- Personal computers: 81.7 minutes (up 6% from 77.4 minutes in 2010)
 Mobile phones: 32.0 minutes (up 27% from 25.2 minutes in 2010)

2) Total daily contact with the four types of mass media and the internet (by gender and age group)

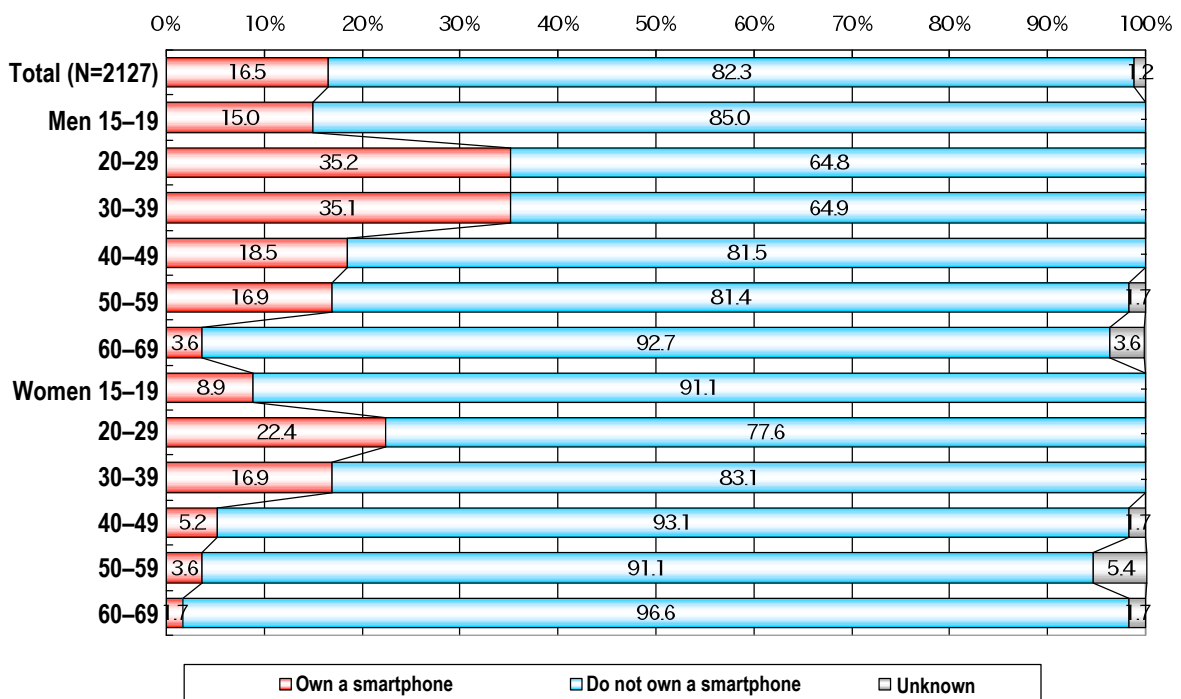


- Men and women in their 20s and 30s are spending more time online using mobile phones. This trend is likely being driven by the increasing prevalence of smartphone devices.
 - Men in their 20s: 65.5 minutes (up 22% from 53.8 minutes in 2010)
 - Men in their 30s: 45.2 minutes (up 64% from 27.5 minutes in 2011)
 - Women in their 20s: 62.3 minutes (up 5% from 59.1 minutes in 2010)
 - Women in their 30s: 28.7 minutes (up 99% from 14.4 minutes in 2010)
- Women in their 20s and 30s are spending more time online using personal computers. One factor driving this trend is thought to be the increasing number of women in their 20s who have used mini-blog services.
 - Women in their 20s: 104.1 minutes (up 21% from 86.1 minutes in 2010)
 - Women in their 30s: 78.1 minutes (up 41% from 55.5 minutes in 2010)

3) Smartphone ownership (over time)



4) Smartphone ownership (by gender and age group)



Survey design

- Survey area: Tokyo, Osaka, Aichi, and Kochi prefectures
- Sampling method: Random Digit Dialing (RDD)
- Survey method: Survey by post
- Subjects: Men and women age 15–69 living in the survey area
- Sample configuration: 2744 of 2953 surveys returned over four areas

- Survey period: Surveys posted on Friday, February 4, 2011; return deadline Thursday, February 17, 2011.
- Conducted by: Video Research Ltd.

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