

**Hakuhodo DY Media Partners Institute of Media Environment:
Time Series Analysis Findings
from the Annual Media Consumption Report 2017**

- (1) Media contact time has decreased nearly across the board, with total contact time dropping off its peak to 378.0 minutes.
- (2) The number of light users (those with less than an hour of contact per day) increased for all forms of media
- (3) Smartphone ownership is closed to 80% at 77.5%, driven by a jump in the percentage of middle-aged and senior users.
- (4) More people are experiencing information overload and demanding trustworthy information

The Hakuhodo DY Media Partners Institute of Media Environment (Headquarters: Minato-ku, Tokyo; Director: Masataka Yoshikawa) has been preparing an Annual Media Consumption Report as a way to study and analyze the relationship between *sei-katsu-sha* and the media since 2006. With the completion of its twelfth survey this year, the institute carried out time series analyses of factors like total contact time and ownership, as well as a comparative analysis with the previous year on *sei-katsu-sha* awareness of media and information.

Note: All figures are for the Tokyo area

- (1) Media contact time has decreased nearly across the board, with total contact time dropping off its peak to 378.0 minutes.
 - Contact time fell for six forms of media, except tablets. Weekly average total media contact time per day dropped from 393.8 minutes last year to 378.0 minutes this year.
 - Contact time for feature phones/smartphones fell slightly for the first time since the survey began, coming in at 90.2 minutes in 2017 versus 90.7 minutes in 2016. Contact time for all four traditional media channels (television, radio, newspapers, and magazines) fell as well as did contact time for computers. Only tablet contact time showed a slight increase, totaling 25.0 minutes this year versus 24.9 minutes in 2016. The overall result was that the percentage of mobile contact time (a combination of feature phones/smartphones and tablets)

topped 30% for the first time at 30.5%.

(2) The number of light users (those with less than an hour of contact per day) increased for all forms of media

- As described in (1), one of the factors driving the decrease in contact time across six forms of media (except tablets) as shown in (1) above was the increase in the percentage of light users for all forms of media. The light user ratio for computers took a particularly large jump from 45.1% in 2016 to 52.5% this year, part of an ongoing decline in computer contact time since its peak in 2011.
- The five forms of media other than magazines and computers saw a decrease in the percentage of heavy users (those with three or more hours of contact time per day) along with the increase in light users, a trend that further accelerated the decrease in contact time for each form of media.

(3) Smartphone ownership is nearing eight in ten at 77.5%, driven by a jump in the percentage of middle-aged and senior users.

- Ownership for both men and women age 39 and below is holding steady, while there has been a significant jump in ownership among those aged 40-69.

(4) More people are experiencing information overload and demanding trustworthy information

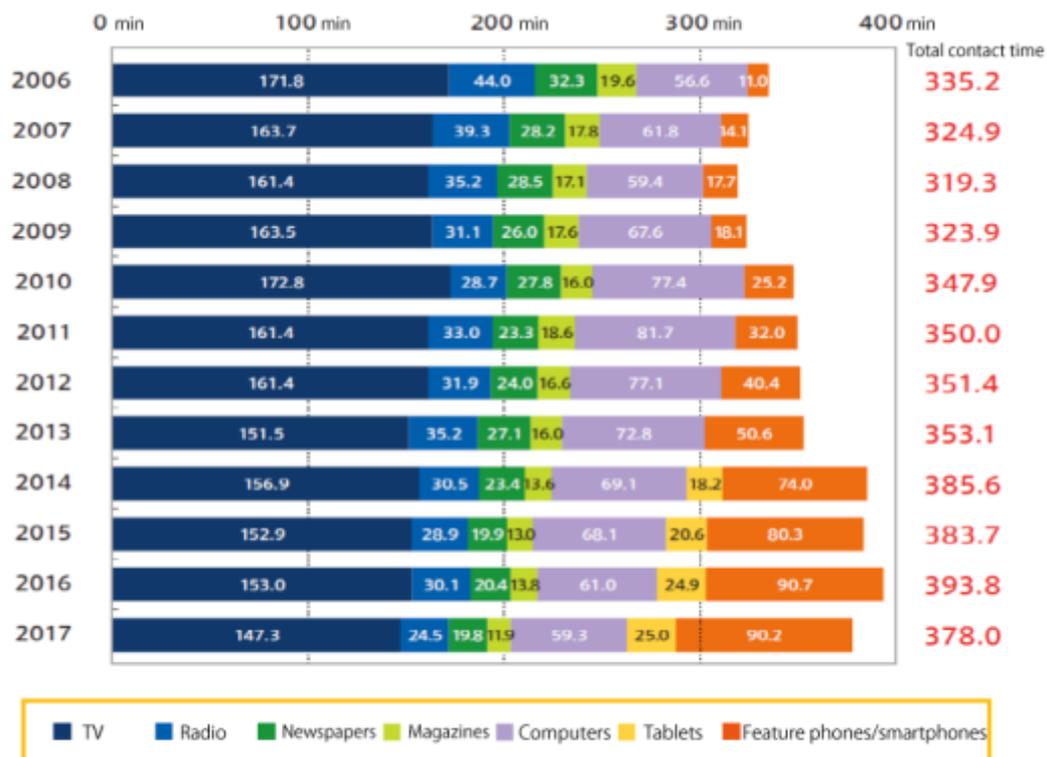
- The percentage of people who feel that there is too much information out there jumped nearly ten percentage points, moving from 42.1% in 2016 to 52.0% in 2017 and passing the halfway mark. The next-largest jump was in the percentage of people who felt that online information couldn't be trusted, up 7.3 percentage points from 71.7% in 2016 to 79.0% this year. This means that nearly 80% people surveyed have doubts about the reliability of online information.
- The percentage of people who said that they check multiple sources when reading about a news item that interests them went up 5.3 percentage points, from 59.1% in 2016 to 64.4% this year. Meanwhile, the number who said that free information or content is sufficient dropped 6.8 percentage points from 46.0% in 2016 to 39.2% this year, its lowest point ever. Sei-katsu-sha are experiencing information overload, and given the deluge of information out there, are increasingly demanding reliable information that they can trust.

■ 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: 2,496 samples in total in four areas (631 from Tokyo, 618 from Osaka, 618 from Aichi, 629 from Kochi)
- Age and gender groups weighted according to the FY2015 Basic Resident Register
- Survey period: January 26, 2017 through February 10, 2017
- Conducted by: Video Research Ltd.

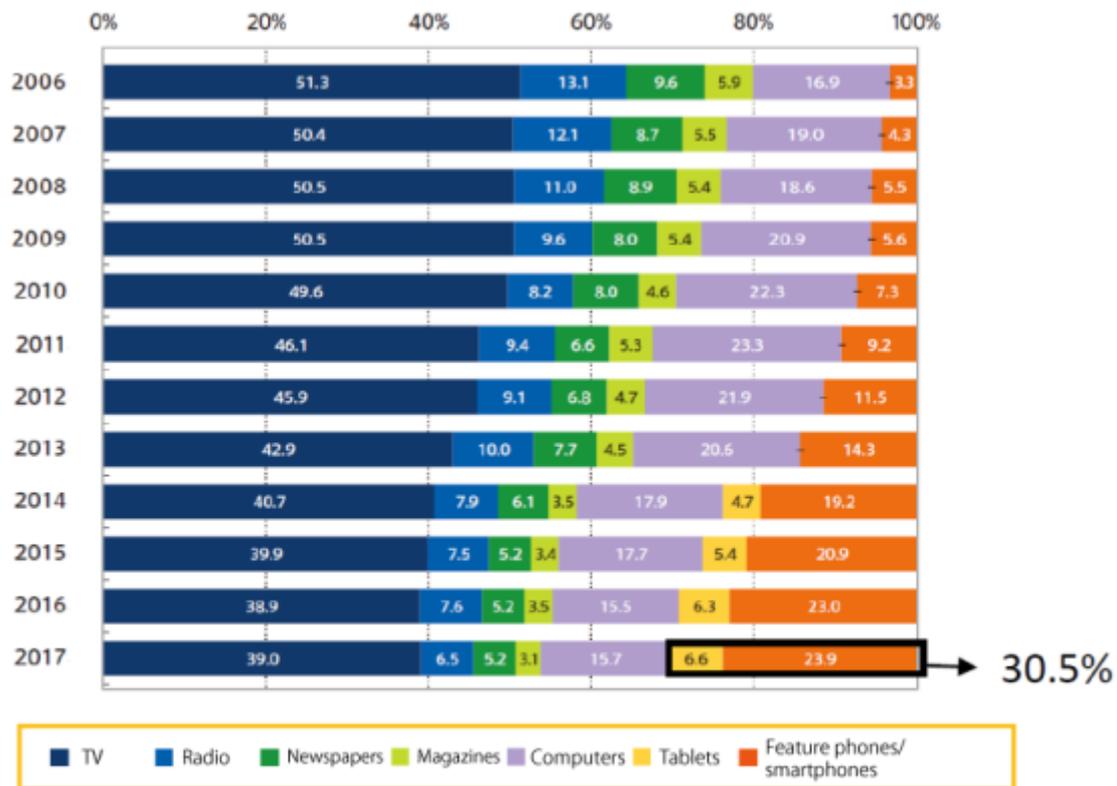
■ Time series analysis from the Annual Media Consumption Report

1-1) Total daily media contact time (weekly averages): Tokyo area
Total media contact time for 2017 was 378.0 minutes, the first drop in two years. Aside from tablets, which held virtually steady, contact time fell for all six types of media. Contact time for feature phones/smartphones fell for the first time since the survey began. Contact time for television, radio, newspaper, and magazines all fell slightly, after increasing slightly last year. Computer time continues to fall after hitting its peak in 2011.



The "feature phone/smartphone" category was labeled "mobile phones" in the 2014 survey, and it included smartphones
 Tablets were added in 2014
 Total contact time for all of those interacting with each type of media

1-2) Contact time by media category (weekly averages): Tokyo area
 Digital media are accounting for a greater percentage of media contact time each year. In recent years, this trend has been driven by the feature phone/smartphone category—which first overtook the computer category in 2014 and has continued to widen the gap. The total share for feature phones/smartphones and tablets topped 30% of the total this year for the first time, coming in at 30.5%.



The "feature phone/smartphone" category was labeled "mobile phones" in the 2014 survey, and it included smartphones
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 Total contact time for all of those interacting with each type of media

2) Comparison of daily contact time for each form of media over the last two years (weekly averages): Tokyo area

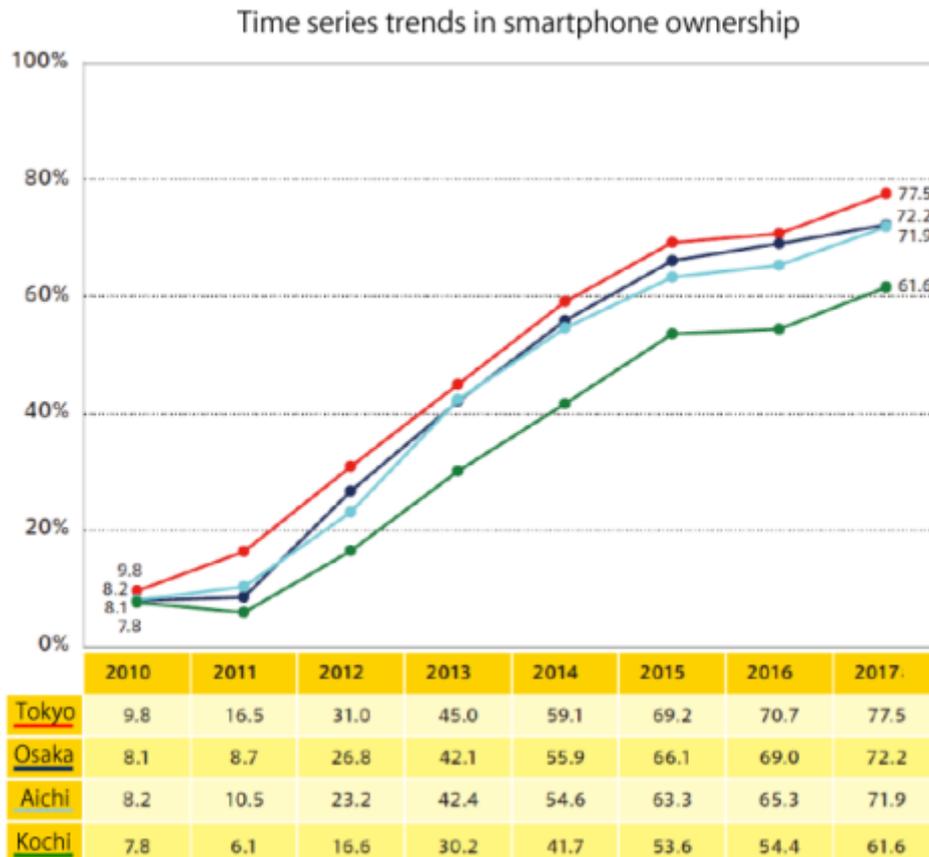
The percentage of light users (those with less than an hour of contact per day) increased for all forms of media. Computers in particular saw an increase of 7.4 percentage points. The five forms of media other than magazines and computers saw a decrease in the percentage of heavy users (those with three or more hours of contact time per day). This trend, combined with the increased percentage of light users, further accelerated the decrease in contact time for each form of media and likely helped drive total media contact time down for the first time in two years.

	Light users (less than an hour of contact per day)			Heavy users (three or more hours of contact per day)			Decrease in contact time	
	2016	2017		2016	2017		2016	2017
TV	13.6%	→ 15.3%	(+1.7)	34.6%	→ 33.8%	(-0.8)	153.0 min	→ 147.0 min (-5.7min)
Radio	40.6%	→ 44.6%	(+4.0)	5.0%	→ 2.9%	(-2.1)	30.1 min	→ 24.5 min (-5.6min)
Newspapers	68.2%	→ 69.9%	(+1.7)	0.4%	→ 0.0%	(-0.4)	20.4 min	→ 19.8 min (-0.6min)
Magazines	66.0%	→ 69.1%	(+3.1)	0.0%	→ 0.0%	(0.0)	13.8 min	→ 11.9 min (-1.9min)
Computers	45.1%	→ 52.5%	(+7.4)	8.6%	→ 9.8%	(+1.2)	61.0 min	→ 59.3 min (-1.7min)
Feature phones/ smartphones	42.6%	→ 43.6%	(+1.0)	16.8%	→ 15.9%	(-0.9)	90.7 min	→ 90.2 min (-0.5min)
Tablets	25.4%	→ 27.7%	(+2.3)	3.5%	→ 3.0%	(-0.5)	24.9 min	→ 25.0 min (+0.1min)

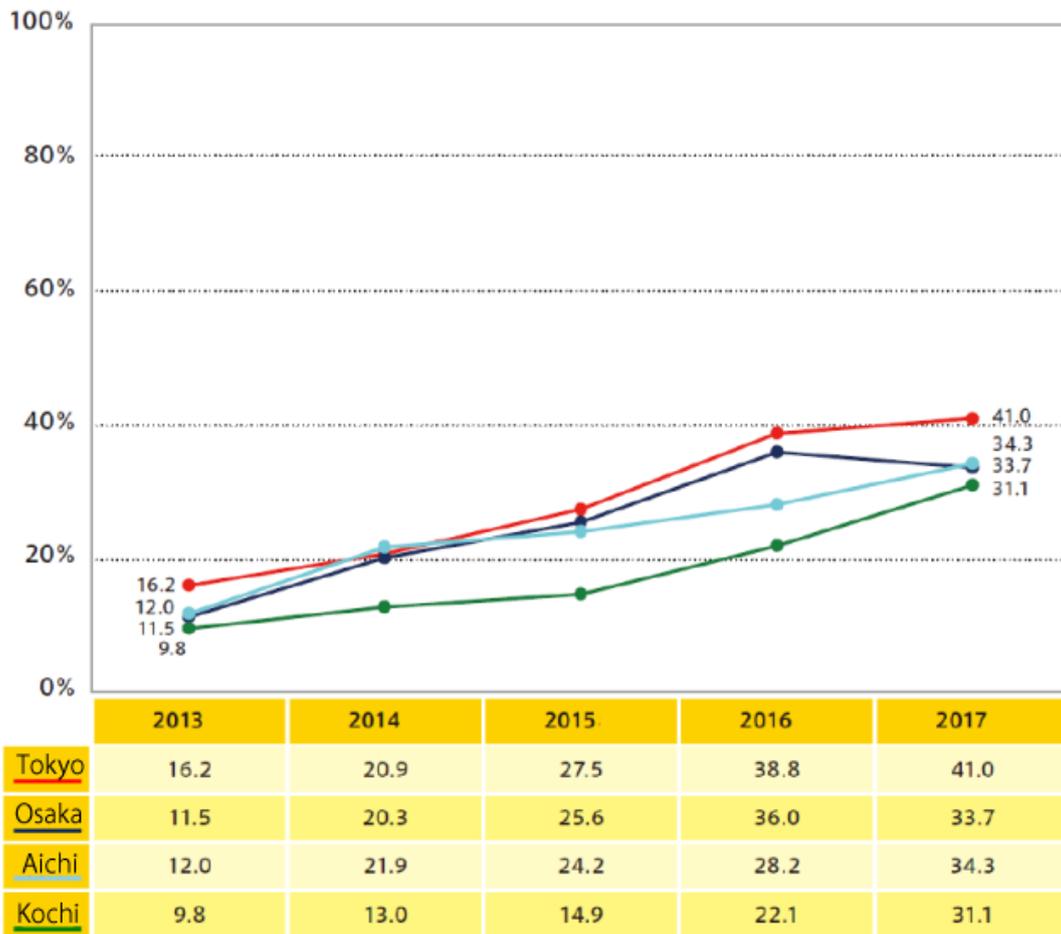
3. Time series trends for smartphone and tablet ownership: All four areas

In the first six years since the survey began in 2010, smartphone ownership (in Tokyo) demonstrated a remarkable increase of more than 700%. Last year, however, it temporarily leveled off. This year ownership again rose nearly seven percentage points over the previous year, reaching nearly 80%. The same trend was observed in the Aichi and Kochi areas as well. Meanwhile, tablets are showing a healthy increase in all areas except Osaka, topping 40% for the first time in Tokyo.

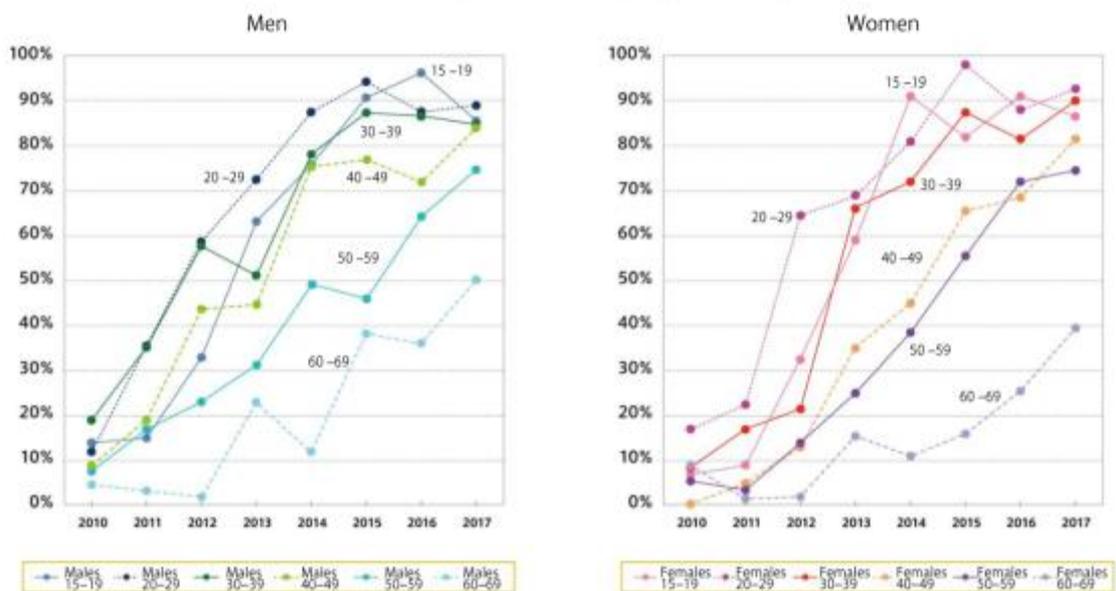
The resumed increase in smartphone ownership is most likely due to rising ownership among middle-aged and senior users 40–69.



Time series trends in tablet ownership



Time series trends in smartphone ownership by gender and age: Tokyo area



4. Comparison of media and information attitudes/awareness over the last two

years: Tokyo area

The survey items listed in the table below are those related to attitudes towards and awareness of media and information that came in at 30% or higher in 2017 and saw at least $\pm 5\%$ change over last year. The largest movement was in “there is too much information out there”, up 9.9 percentage points. This was followed by “online information can’t be trusted”, which jumped 7.3 percentage points.

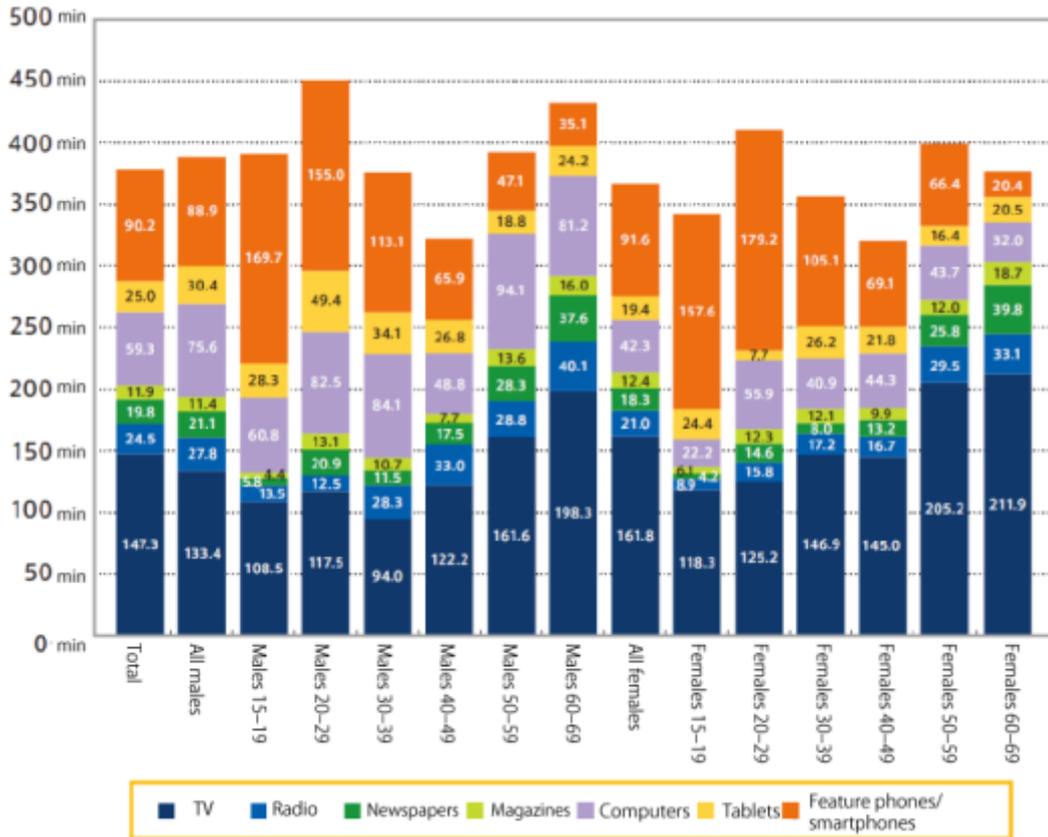
The percentage of people who said that they check multiple sources when reading about a news item that interests them was up 5.3 percentage points, from 59.1% in 2016 to 64.4% this year. Meanwhile, the number who said that free information and content was sufficient dropped 6.8 points from 46.0% to 39.2%, and decreased among all items. These results suggest that sei-katsu-sha are experiencing information overload, and given the deluge of content out there, are increasingly demanding reliable information they can trust.

List of items related to media and information attitudes/awareness
(Of those coming in at 30% or higher in 2017 and changing by at least 5 percentage points, in order of year-on-year increase)

	2016	2017	
There is too much information out there	42.1	52.0	+9.9
Online information can't be trusted	71.7	79.0	+7.3
I take my smartphone to bed with me	49.4	56.3	+6.9
Information comes from traditional sources like television and radio	33.4	39.5	+6.1
The first thing I do when I wake up is check my smartphone	35.8	41.6	+5.8
I check multiple sources when reading about a news item that interests me	59.1	64.4	+5.3
Free information and content is sufficient	46.0	39.2	-6.8

Total daily media contact time by age and gender (weekly averages, 2017): Tokyo area

Total daily media contact time by age and gender (weekly averages, 2017): Tokyo area



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