

Note: The information below has been distributed to the Tokyo Chamber of Commerce and Industry Press Club, the Joho Tsushin Kishakai (Telecommunications Press Society), and the Japan Ministry of Internal Affairs and Communications Press Club

Press Release

June 13, 2012

Hakuhodo DY Media Partners, Inc.

Great Tohoku Earthquake and Shift to Terrestrial Digital Broadcasting Result in Relatively Steady Media Contact Time; Significant Increase in Mobile Internet Access
2012 Fixed-point Media Survey by Hakuhodo DY Media Partners'
Institute of Media Environment

Hakuhodo DY Media Partners' Institute of Media Environment has completed its 2012 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 traditional mass media outlets and two online media outlets (computers and mobile/smartphones) per day is five hours and fifty-one minutes, based on weekly averages. This figure has remained relatively steady since 2010, suggesting that daily media contact time has hit its saturation point in terms of the time available in people's daily lives.

Recent trends in the data have seen internet contact time increase (both via computers and mobile/smartphones), but mobile phone online access in particular has jumped significantly to 40.4 minutes a day—up more than 230% from 2008. Past data showed that females aged 10–19 in particular tended to spend time online using their phones, but those figures have now increased across a broad spectrum that includes both men and women age 10 to 49. For males and females between 10 and 19, online access via phone has surpassed computer-based access.

As computer-based online access time shows signs of falling off slightly, survey results indicate an accelerated shift towards mobile devices, which has been triggered by the increasing popularity of smartphones.

Smartphone ownership doubled over the last year in the Tokyo area from 16.5% to 31.0%, and nearly tripled in Osaka—jumping from 8.7% to 26.8%. Ownership in Aichi and Kochi also showed a two-fold increase. In looking at different age and gender groups, around 60% of Tokyo men in their 20s and 30s and women in their 20s now own smartphones, as do more than half of the youngest male and female age

groups.

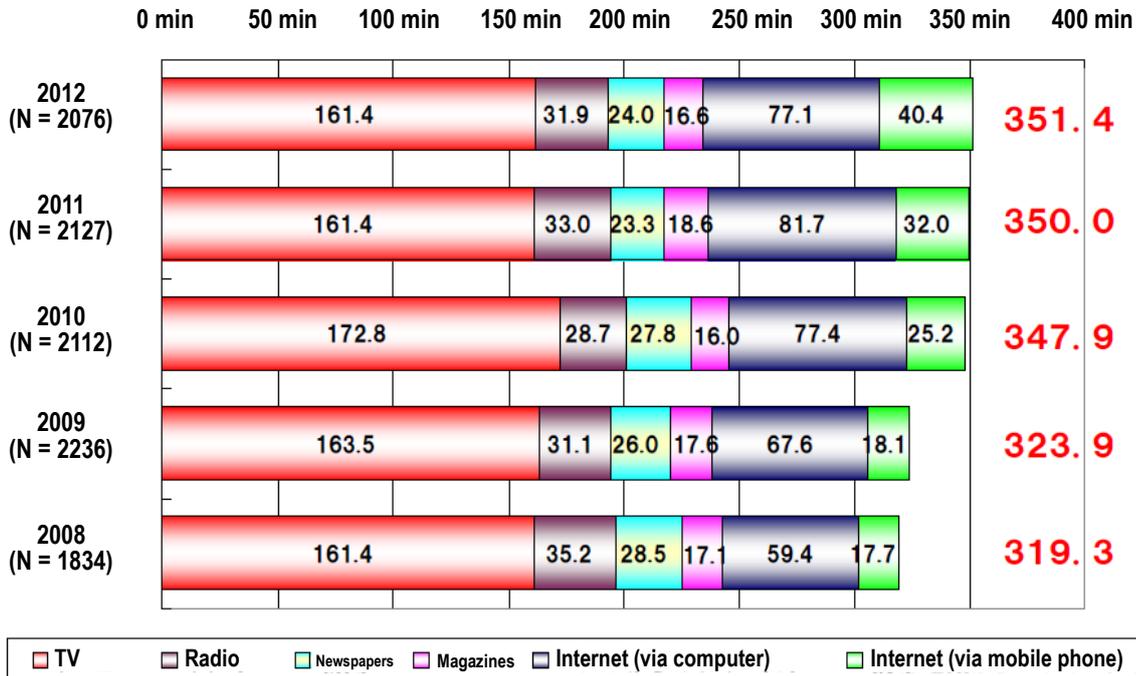
As smartphones have increased in popularity, time spent interacting via social media has also increased. People in the Tokyo area now spend an average of 23.3 minutes a day using social media, and the number is particularly high for males and females between the ages of 10 and 30. In terms of region, social media usage is particularly high in the Tokyo area.

More social media users are also accessing these tools while watching TV or performing other activities, and it is predicted that the linkages between online and traditional media outlets will become increasingly critical as the popularity of smartphones continues to rise.

The Fixed-Point Media Survey seeks to understand exactly how sei-katsu-sha interact with media as it becomes increasingly digital, with new forms of hardware and services continually appearing on the scene. It has been conducted each year since 2004 with the aim of discovering emerging trends in the structure of the advertising media market. The Institute of Media Environment will continue to research changes in media conditions in order to identify clues that anticipate next-generation advertising, striving to boost its communication planning abilities and generate positive media outcomes.

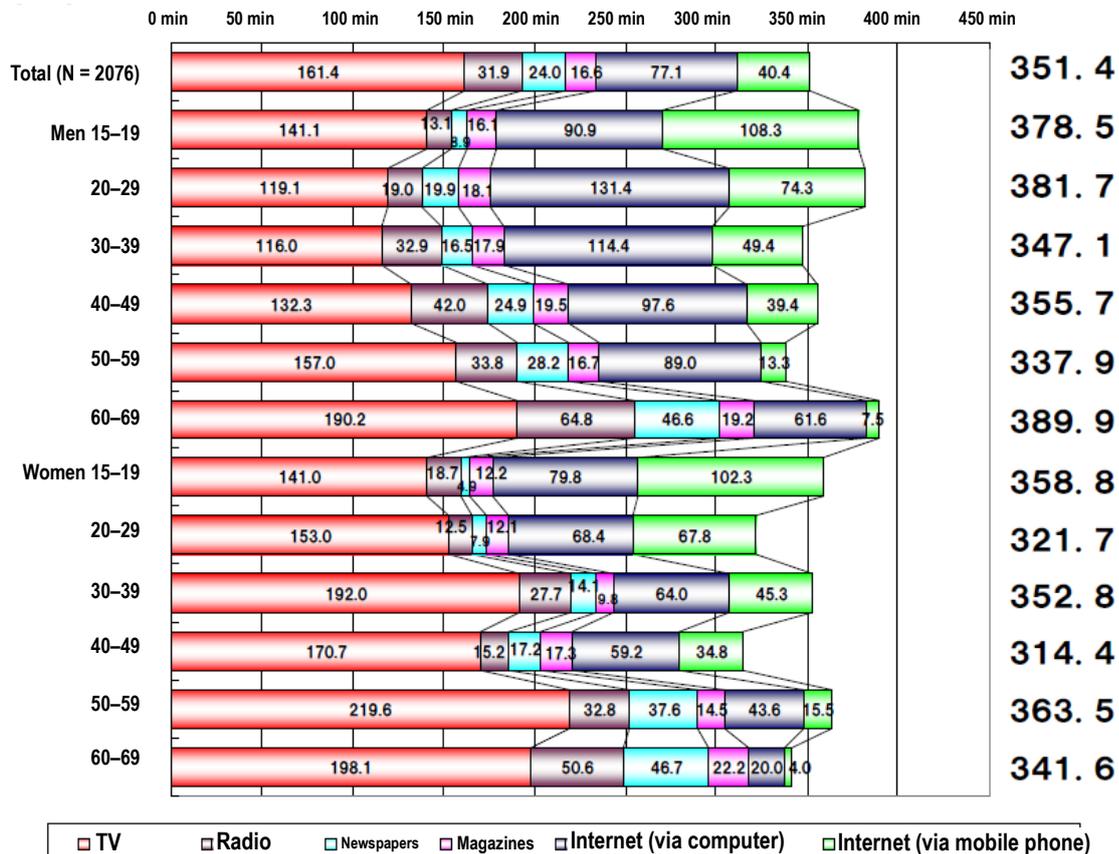
■ Key survey results

1. Tokyo region: Total daily contact with traditional mass media outlets and the internet (weekly averages)



- Total media contact time has been hovering steady around 350 minutes since 2010
- Internet contact time via mobile phones (including smartphones) is on the rise, increasing 26.2% between 2011 (32.0 minutes) and 2012 (40.4 minutes)

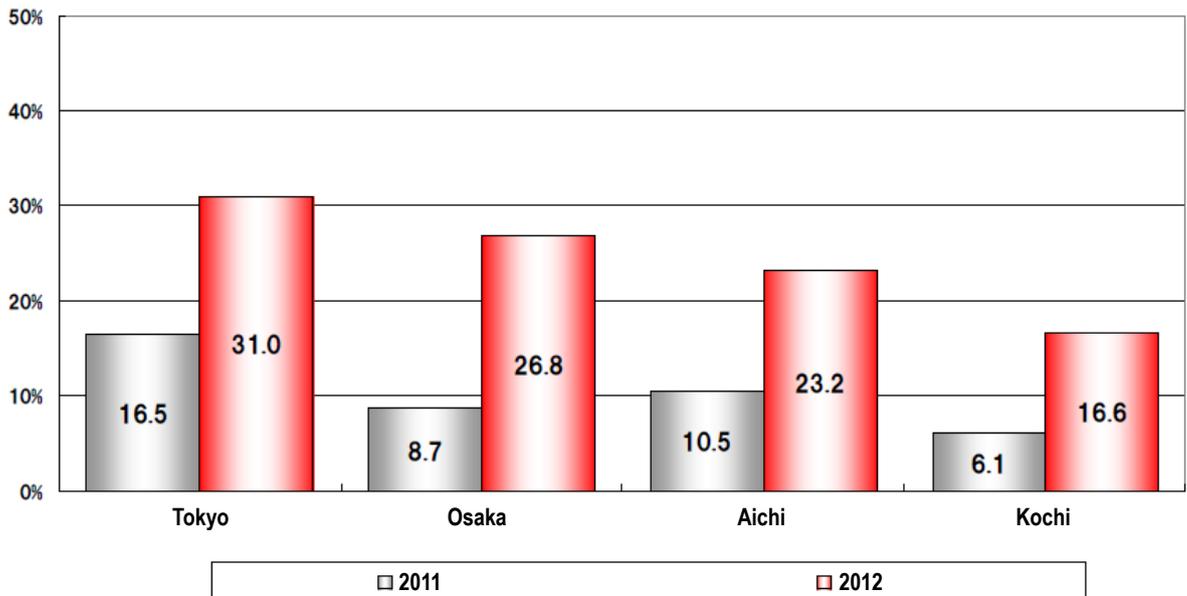
2. Total daily contact with traditional mass media outlets and the internet (by gender and age group)



N=		TV	Radio	Newspapers	Magazines	Internet (via computer)	Internet (via mobile phone)	Total (min)
Total	2076	161.4	31.9	24.0	16.6	77.1	40.4	351.4
Men 15-19	58	141.1	13.1	8.9	16.1	90.9	108.3	378.5
Men 20-29	185	119.1	19.0	19.9	18.1	131.4	74.3	381.7
Men 30-39	248	116.0	32.9	16.5	17.9	114.4	49.4	347.1
Men 40-49	225	132.3	42.0	24.9	19.5	97.6	39.4	355.7
Men 50-59	166	157.0	33.8	28.2	16.7	89.0	13.3	337.9
Men 60-69	180	190.2	64.8	46.6	19.2	61.6	7.5	389.9
Women 15-19	55	141.0	18.7	4.9	12.2	79.8	102.3	358.9
Women 20-29	175	153.0	12.5	7.9	12.1	68.4	67.8	321.7
Women 30-39	233	192.0	27.7	14.1	9.8	64.0	45.3	352.8
Women 40-49	208	170.7	15.2	17.2	17.3	59.2	34.8	314.4
Women 50-59	157	219.6	32.8	37.6	14.5	43.6	15.5	363.5
Women 60-69	188	198.1	50.6	46.7	22.2	20.0	4.0	341.6

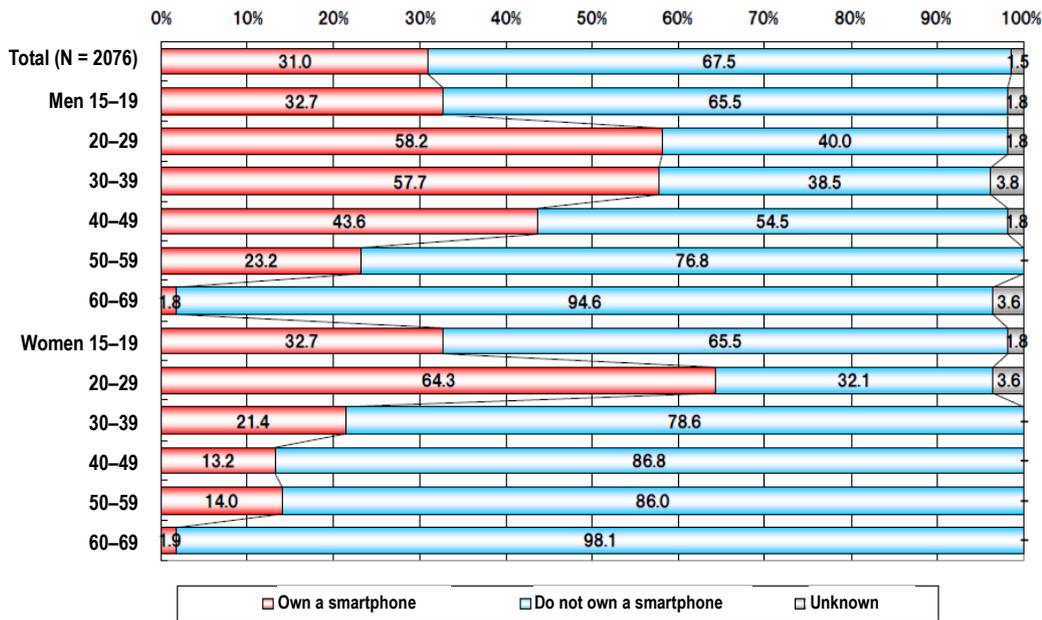
- Men and women between the ages of 10 and 49 are spending more time accessing the internet via mobile phones.
- Men 15-19: 108.3 minutes (up 28.5% from 84.3 minutes in 2011)
- Women 15-19: 102.3 minutes (up 16.0% from 88.2 minutes in 2011)
- Men 20-29: 74.3 minutes (up 13.4% from 65.5 minutes in 2011)
- Women 20-29: 67.8 minutes (up 8.8% from 62.3 minutes in 2011)
- Men 30-39: 49.4 minutes (up 9.3% from 45.2 minutes in 2011)
- Women 30-39: 45.3 minutes (up 57.8% from 28.7 minutes in 2011)
- Men 40-49: 39.4 minutes (up 83.3% from 21.5 minutes in 2011)
- Women 40-49: 34.8 minutes (up 161.7% from 13.3 minutes in 2011)

3. Smartphone ownership over time



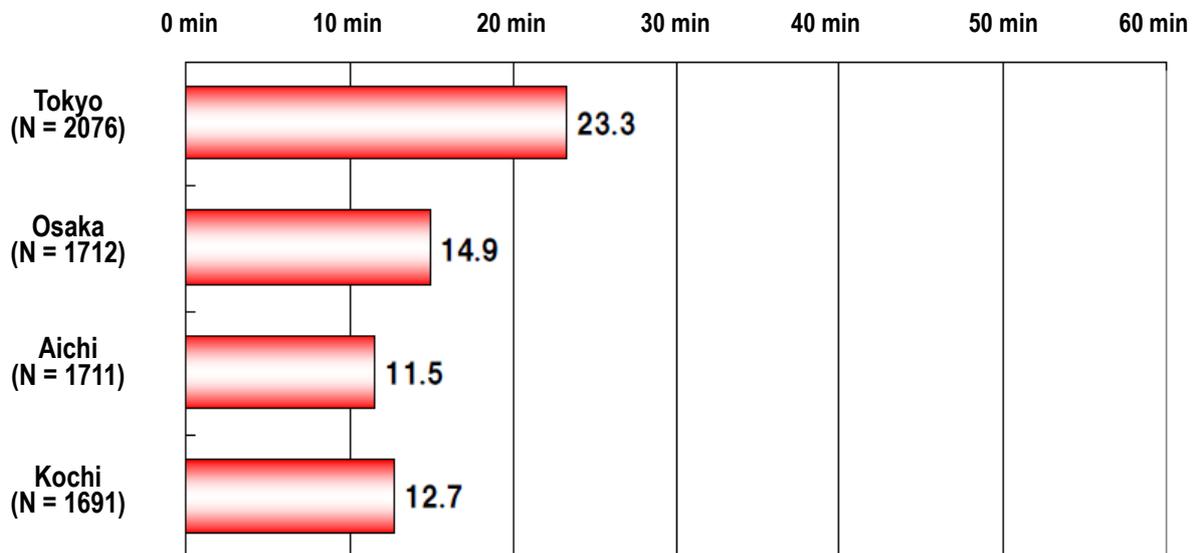
- Smartphone ownership has more than doubled in each region surveyed. The increase is particularly pronounced in the Osaka area.
 Tokyo region: 31.0% (up 87.9% from 16.5% in 2011)
 Osaka region: 26.8% (up 208.0% from 8.7% in 2011)
 Aichi region: 23.2% (up 121.0% from 10.5% in 2011)
 Kochi region: 16.6% (up 172.1% from 6.1% in 2011)

4. Tokyo region: Smartphone ownership by gender and age group

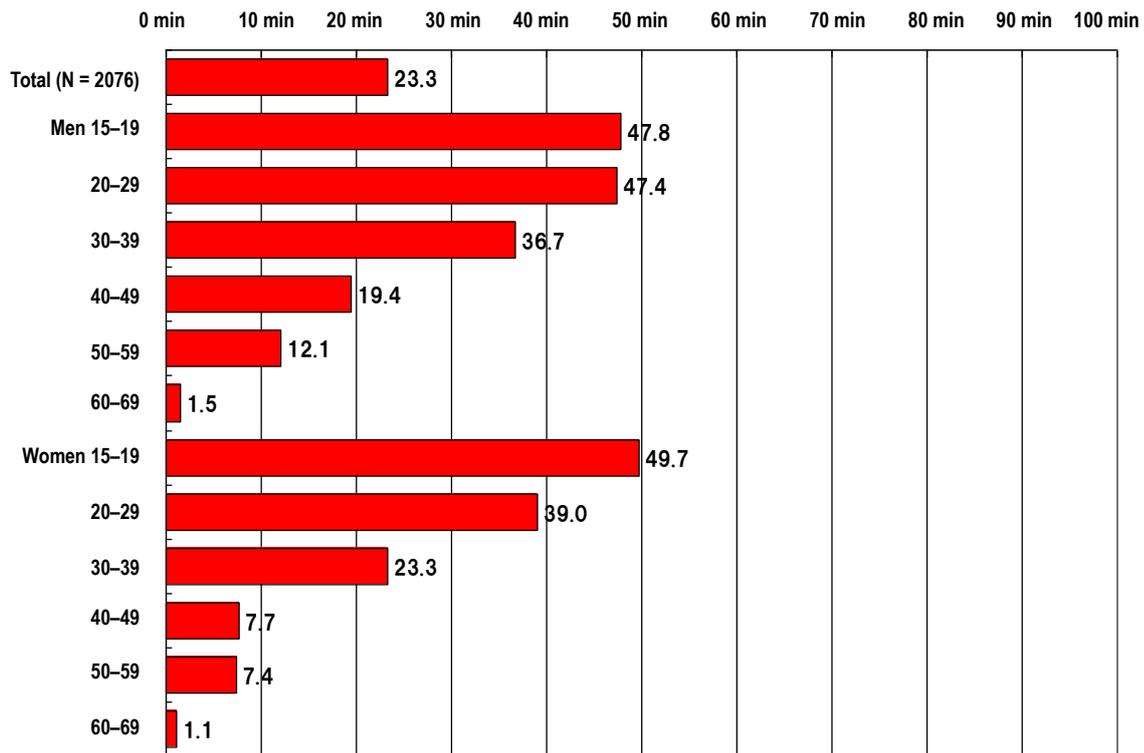


- Smartphone ownership is at around 60% for men in their 20s and 30s and women in their 20s.
- Smartphone ownership is still uncommon among those in their 60s

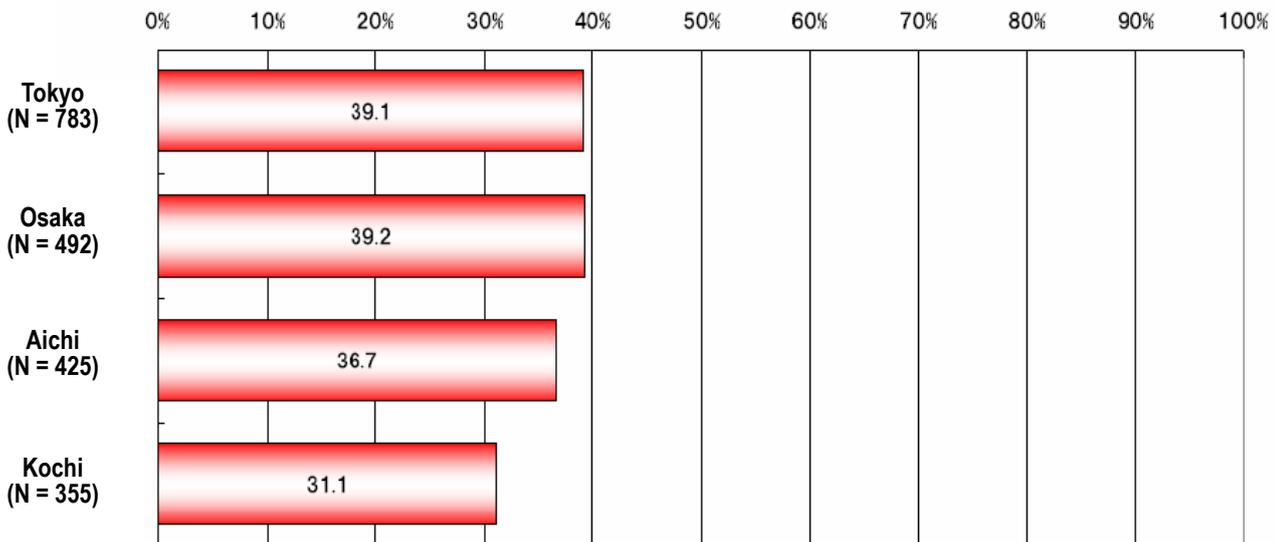
5. Time spent accessing social media per day (weekly averages)



6. Time spent accessing social media (by gender and age group)



7. Social media users who post/read posts about TV programs while watching them



- Between 30 and 40% of social media users have practiced “social viewing” of TV programs; in other words, using social media to post and/or reading posts about the program as they watch it.

■ 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
- Sample configuration: 2651 samples in four areas total (659 from Tokyo, 666 from Osaka, 676 from Aichi, 650 from Kochi)
Age and gender groups were weighted according to the FY2011 Basic Resident Register
- Survey period: Surveys posted on Friday, February 3, 2012; return deadline Thursday, February 16, 2012.
- Conducted by: Video Research Ltd.

■ For more information, contact:

Hakuhodo DY Media Partners

Public Relations Group

c/o Yamasaki/Kato TEL: +81-3-6441-9347

Institute of Media Environment

c/o Yoshida/Nakasugi TEL: +81-3-6441-9713