

June 10, 2013  
Hakuhodo DY Media Partners

**As smartphone use spreads, mobile Internet usage time continues to increase.  
Significantly increased use among 20s, 30s women.  
HDYMP Institute of Media Environment Fixed-point Media Survey 2013**

Hakuhodo DY Media Partners Institute of Media Environment has conducted Fixed-point Media Survey 2013, an analysis of the relationship between sei-katsu-sha and the media. The Institute of Media Environment is based in Minato-ku, Tokyo and directed by Hiroshi Yoshida.

Survey results for the Tokyo region show that daily media usage for the four types of mass media and two types of Internet media (namely, personal computers and mobile telephones, including smartphones) combined is an average 5 hours 53 minutes (weekly average), which is about the same as last year. This suggests that daily media usage has reached a saturation point within overall lifestyle time, as it has changed little since 2010.

In recent years, Internet connection time via personal computers and mobile phones (including smartphones) has been increasing, but this year mobile phone Internet connection time was 50.6 minutes, nearly ten minutes more than the 40.4 minutes recorded last year, an increase of 25.2%. At the same time, like last year Internet, connection time via personal computer decreased, suggesting that as smartphone use increases, people are switching from personal computers to mobile phones when connecting to the Internet.

The increase in Internet connection via mobile phones was especially pronounced for women in their 20s and 30s. Connection time for women in their 20s increased from 67.8 minutes to 119.9 minutes, an increase of 52.1 minutes and 76.8% over the previous year. Connection time for women in their 30s increased from 45.3 minutes to 73.9 minutes, an increase of 28.6 minutes and 63.1% over the previous year.

Smartphone ownership was 45.0%, an increase of more than 10 points over the 31.0% recorded last year.

The smartphone functions people used most were “send mail”, “search”, “phone call”, and “camera”, but “watch videos”, “use communication apps”, “use SNS, mini-blog”, “games”, and the like was higher than “phone call” among users in their 10s.

Moreover, 48.6% of respondents use their smartphones while watching television. Given that the increasingly rapid growth of smartphone use is expected to continue, we can conclude that information and entertainment design that fuses the mobile phone with existing media will become even more important.

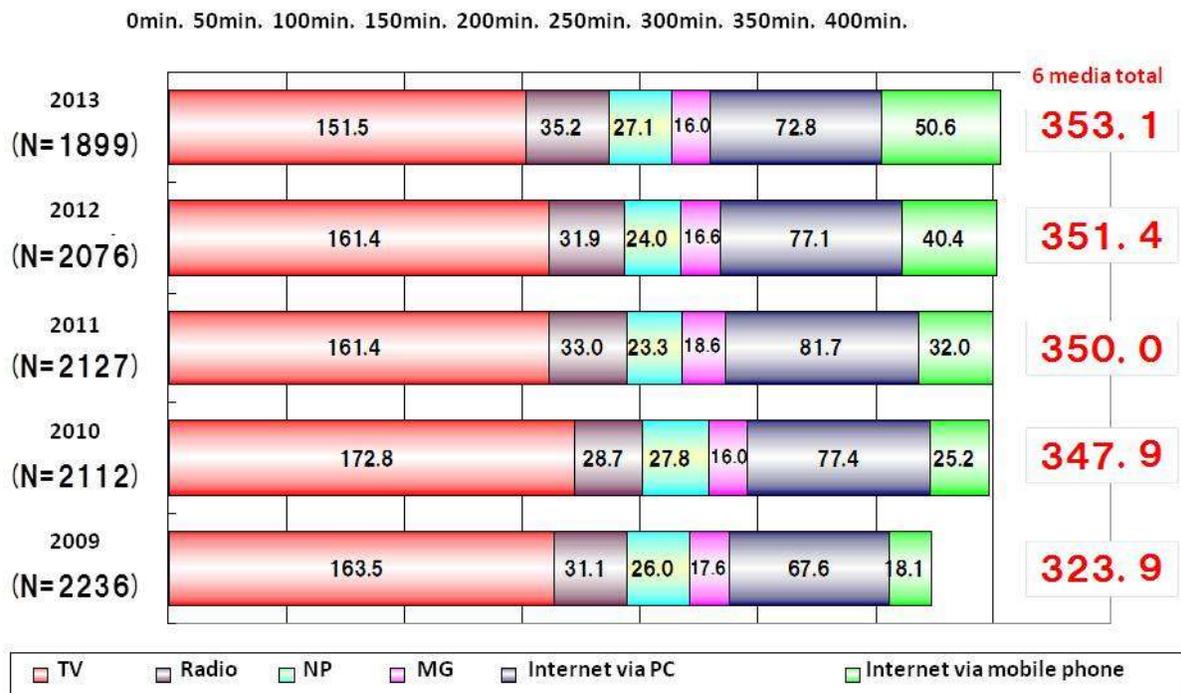
This survey has been conducted continuously since 2004 for the purpose of finding out how sei-katsu-sha interact with media as it becomes more and more digitalized and a steady stream of new

hardware and services appear on the market and for the purpose of discovering trends that are shaping the ad media market. The Institute of Media Environment will continue its efforts to improve communication planning and media effectiveness by monitoring changes in the media environment and uncovering the signs that point to the next-generation of advertising.

■ Key survey results

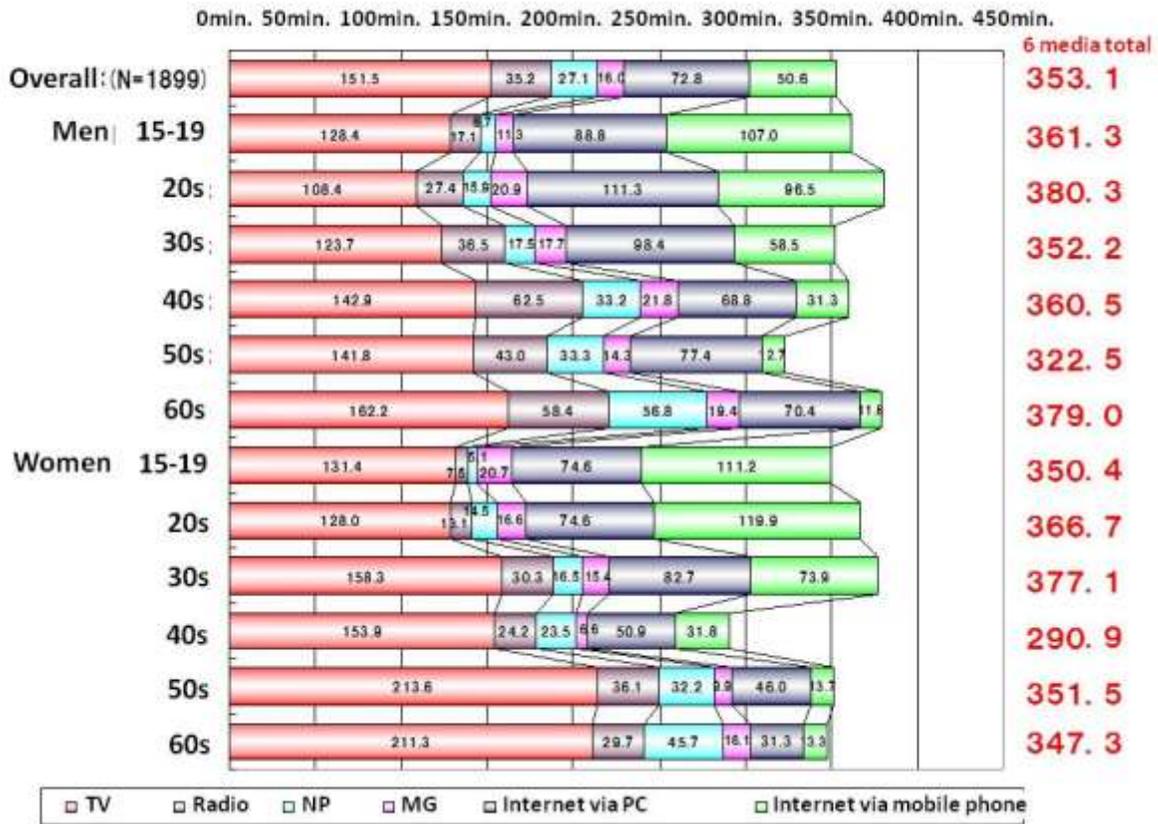
1. Daily media contact time weekly average trends for the 4 types of mass media and Internet combined (time series graph): Tokyo region

- Media contact time has remained roughly constant at around 350 minutes since 2010.
- Increase use of mobile phones (including smartphones) to connect to Internet: 40.4 minutes in 2012, 50.6 minutes in 2013.



## 2. Daily media contact time weekday average trends for the 4 types of mass media and Internet combined by sex and age: Tokyo region

- Internet connection time from mobile phones for men 10s and 20s, and women 10s, 20s, and 30s is more than 60 minutes.



## Data

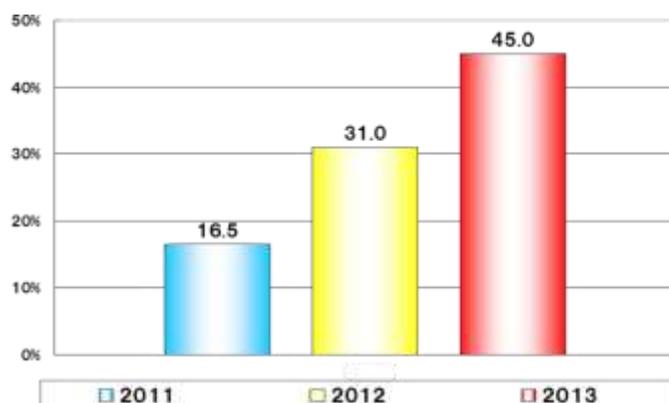
	N=	TV	Radio	Newspaper	Magazine	Internet via PC	Internet via mobile phone	6 media total (min.)
Overall	1899	151.5	35.2	27.1	16.0	72.8	50.6	353.1
Men 15-19	53	128.4	17.1	8.7	11.3	88.8	107.0	361.3
Men 20-29	166	108.4	27.4	15.9	20.9	111.3	96.5	380.3
Men 30-39	222	123.7	36.5	17.5	17.7	98.4	58.5	352.2
Men 40-49	213	142.9	42.5	33.2	21.8	68.8	31.3	360.5
Men 50-59	152	141.8	43.0	33.3	14.3	77.4	12.7	322.5
Men 60-69	164	162.2	58.4	56.8	19.4	70.4	11.8	379.0
Women 15-19	51	131.4	7.5	5.1	20.7	74.6	111.2	350.4
Women 20-29	158	128.0	13.1	14.5	16.6	74.6	119.9	366.7
Women 30-39	209	158.3	30.3	16.5	15.4	82.7	73.9	377.1
Women 40-49	198	153.9	24.2	23.5	6.6	50.9	31.8	290.9
Women 50-59	144	213.6	36.1	32.2	9.9	45.0	13.7	351.5
Women 60-69	170	211.3	29.7	45.7	16.1	31.3	13.3	347.3

\*Internet connection time from mobile phones (including smartphones) has increased significantly among women in their 20s and 30s.

	2012	2013	Increase (min.)
Overall	40.4	50.6	10.2
Women 20-29	67.8	119.9	52.1
Women 30-39	45.3	73.9	28.6

### 3. Smartphone ownership over time: Tokyo region

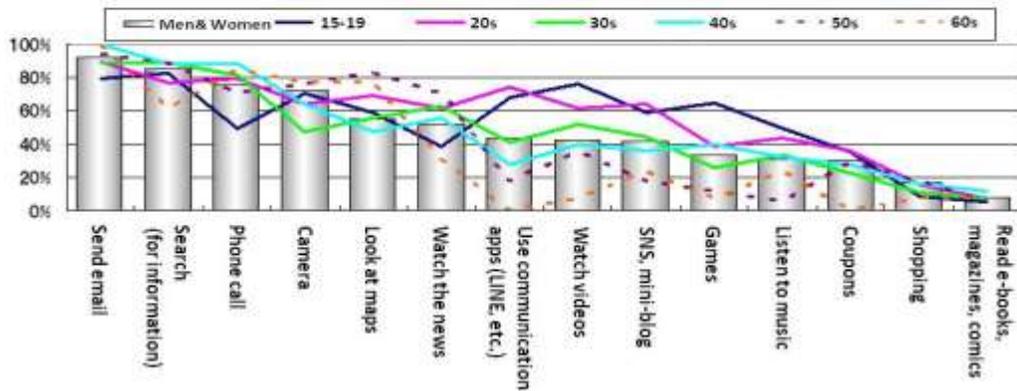
- Ownership in 2012 of 31.0% increased 14 points to 45.0% in 2013.



#### 4. Smartphone usage by age and sex: Tokyo region

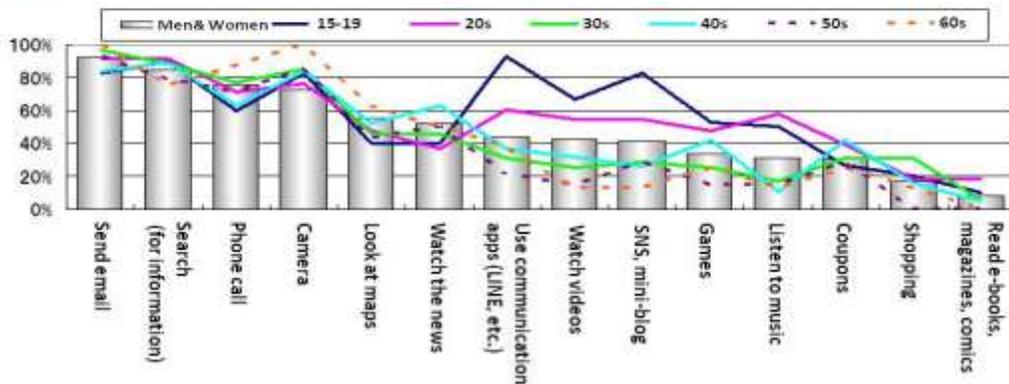
- Smartphone usage is concentrated on “sending mail”, “search”, “phone call”, and “camera”.
- Users in their 10s use smartphones for “video”, “communication apps”, “SNS”, “Games”, and the like more than “phone call”.

##### (Men)



Men & Women (n=855)	15-19 (n=34)	20s (n=120)	30s (n=113)	40s (n=95)	50s (n=47)	60s (n=38)
Send email	92.3	79.4	89.7	88.9	94.1	100.0
Search (for information)	85.2	82.4	76.9	88.9	88.2	61.5
Phone call	75.7	50.0	79.5	81.5	88.0	84.6
Camera	72.8	70.6	64.1	48.1	76.5	76.9
Look at maps	55.4	58.8	69.2	55.6	82.4	76.9
Watch the news	52.2	38.2	61.5	63.0	70.6	30.8
Use communication apps (LINE, etc.)	43.6	67.6	74.4	40.7	17.6	-
Watch videos	42.3	76.5	61.5	51.9	35.3	7.7
SNS, mini-blog	41.5	58.8	64.1	44.4	17.6	23.1
Games	33.6	64.7	38.5	25.9	11.8	7.7
Listen to music	31.1	50.0	43.6	33.3	5.9	23.1
Coupons	30.5	35.3	35.9	22.2	29.4	-
Shopping	16.9	8.8	15.4	11.1	17.6	7.7
Read e-books, magazines, comics	8.3	6.9	7.7	7.4	5.9	7.7

##### (Women)

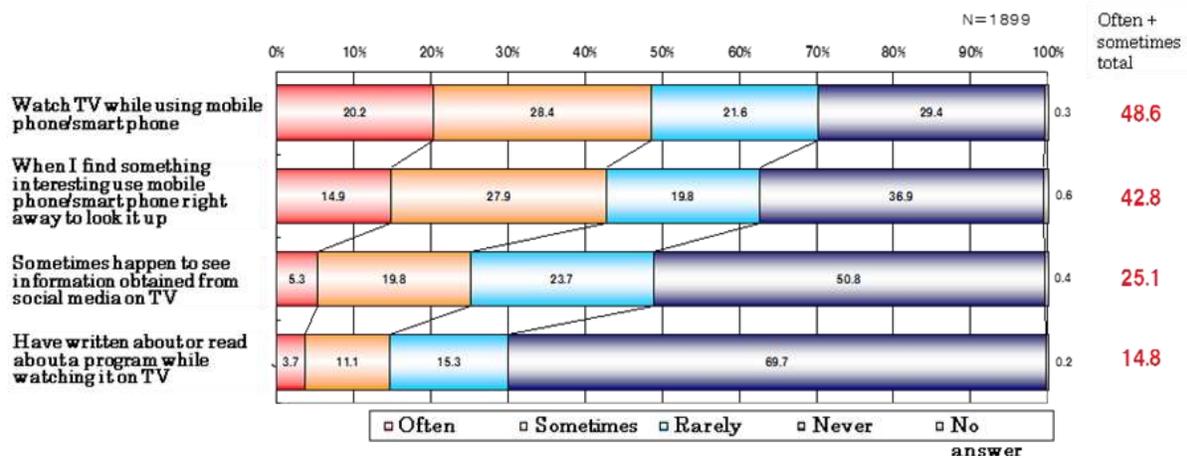


Men & Women (n=855)	15-19 (n=30)	20s (n=109)	30s (n=138)	40s (n=70)	50s (n=36)	60s (n=26)
Send email	92.3	83.3	92.1	97.1	92.9	100.0
Search (for information)	85.2	90.0	92.1	88.6	78.6	75.0
Phone call	75.7	60.0	71.1	77.1	71.4	87.5
Camera	72.8	83.3	76.3	85.7	85.7	100.0
Look at maps	55.4	40.0	47.4	45.7	42.9	62.5
Watch the news	52.2	40.0	36.8	45.7	50.0	50.0
Use communication apps (LINE, etc.)	43.6	93.3	60.5	31.4	21.4	37.5
Watch videos	42.3	66.7	55.3	25.7	14.3	12.5
SNS, mini-blog	41.5	83.3	55.3	28.6	28.6	12.5
Games	33.6	53.3	47.4	25.7	14.3	25.0
Listen to music	31.1	50.0	57.9	17.1	14.3	12.5
Coupons	30.5	26.7	39.5	31.4	28.6	25.0
Shopping	16.9	20.0	18.4	31.4	-	12.5
Read e-books, magazines, comics	8.3	10.0	18.4	5.7	-	-

\*Smartphone ownership base

## 5. TV watching frequency and behavior: Tokyo region

- 48.6% responded that they “use their smartphone while watching TV”, nearly half.



### ■ Research survey design

- Survey area: Tokyo, Osaka, Aichi Prefecture, Kochi Prefecture
- Sample selection method: RDD (Random Digit Dialing)
- Survey method: postal survey
- Survey respondents: men and women age 15 to 69
- Respondent composition: 4 region sample of 2,614 individuals (Tokyo: 649, Osaka: 650, Aichi: 666, Kochi: 649). Sex and age weighted based on 2012 Basic Resident Register.
- Survey period: Saturday, February 2 through Thursday, February 14, 2013
- Survey conducted by: Video Research Ltd.

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