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Dentsu Innovation Institute Survey Comparing the Actual Usage of Tablet Devices in Japan and the US

—In the US, tablet usage is becoming a daily affair, taking the lead in usage with e-books and as a link between TV and social media—

Dentsu Innovation Institute recently conducted a survey in both Japan and the US, focusing on how users who own digital devices such as tablets and smartphones use multiple devices.

Currently smartphones are rapidly achieving popularity in both Japan and the US. However, in the US it has not stopped there. In January this year, tablet devices have spread to 19% of the population (18 years old and older) and users are widening from a trendsetting demographic to the masses¹.

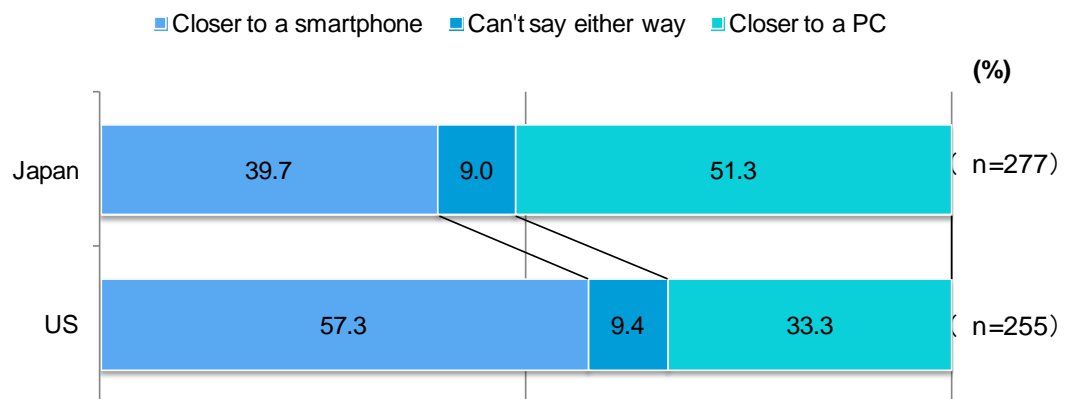
Amidst such changes, the differentiating use of multiple devices such as PCs, smartphones, and tablets by their owners is drawing attention. Following the "Survey on the Actual Usage of iPad Devices in the US" announced by Dentsu Innovation Institute last year, a survey of media and content usage trends focusing on multiple device users was conducted in both Japan and the US.

¹ According to the US Pew Research Center
<http://pewresearch.org/pubs/2176/tablet-computers-ebook-readers>

1. Positioning of Tablet Devices

In regard to the image of tablet usage, 51% of people in Japan consider a tablet to be “closer to a PC.” In the US, meanwhile, 57% consider it to be “closer to a smartphone.” It can be seen that tablets are starting to be positioned more as a device for using applications and media content in the US.

Whether a tablet is closer to a smartphone or a PC (Japan/US comparison)

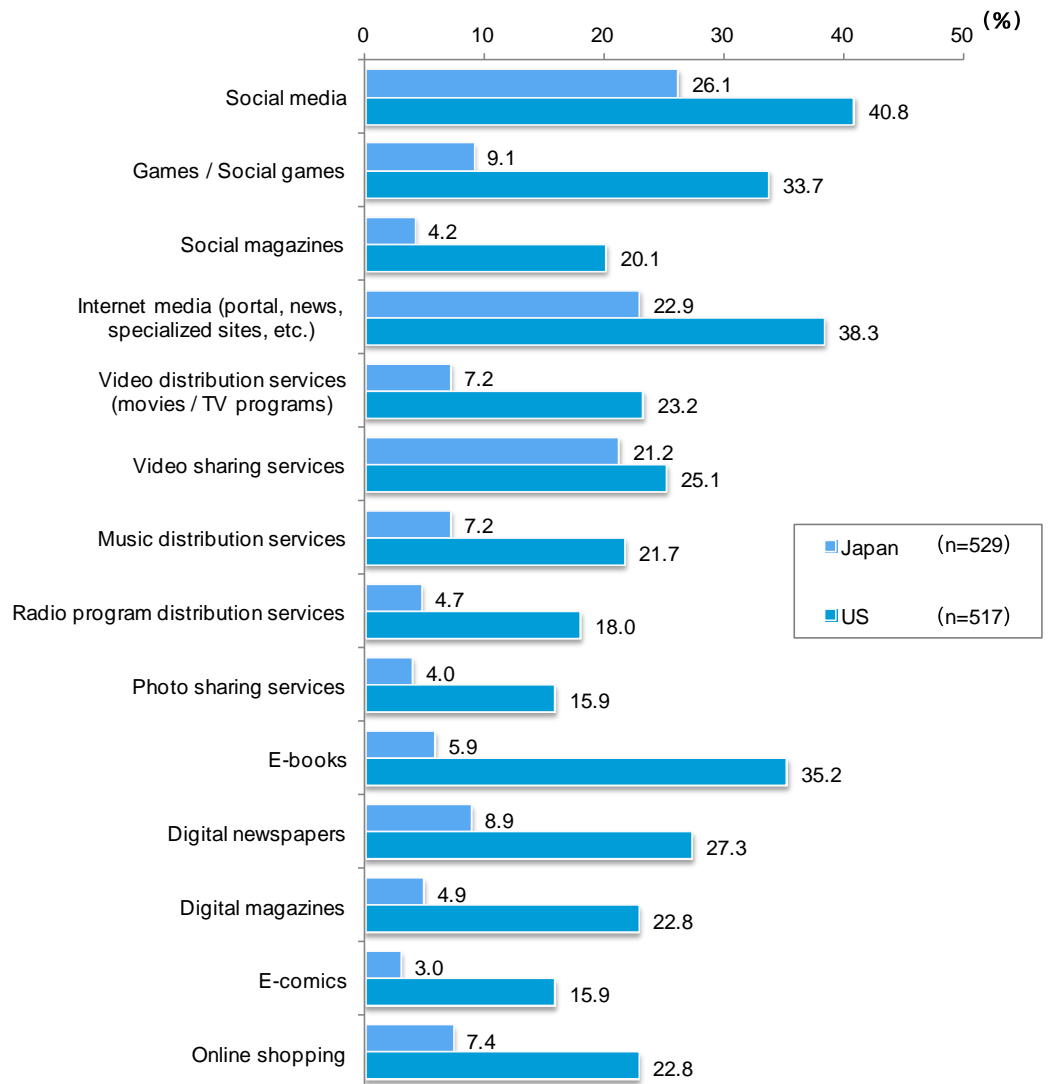


Response from owners of both a tablet and a smartphone

2. Usage of Media on Tablet Devices

In the US, the tablet is used numerous times daily for media content. In Japan however, excluding social media (26%) and video sharing services (21%) etc., there is not much daily usage by tablet owners. A particularly big difference can be seen for e-book usage: 35% for the US, and 6% for Japan.

**Daily media usage using a tablet
(Japan/US comparison)**

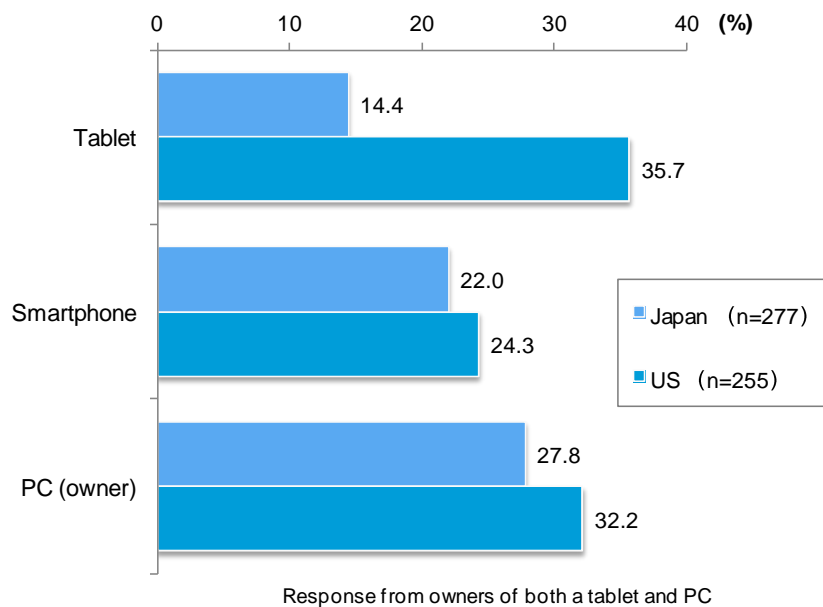


Aggregation of all Japan & US tablet owners
Total respondent rate for "many times a day" and "about once a day"

3. Tablet Devices Which Link TVs and Social Media

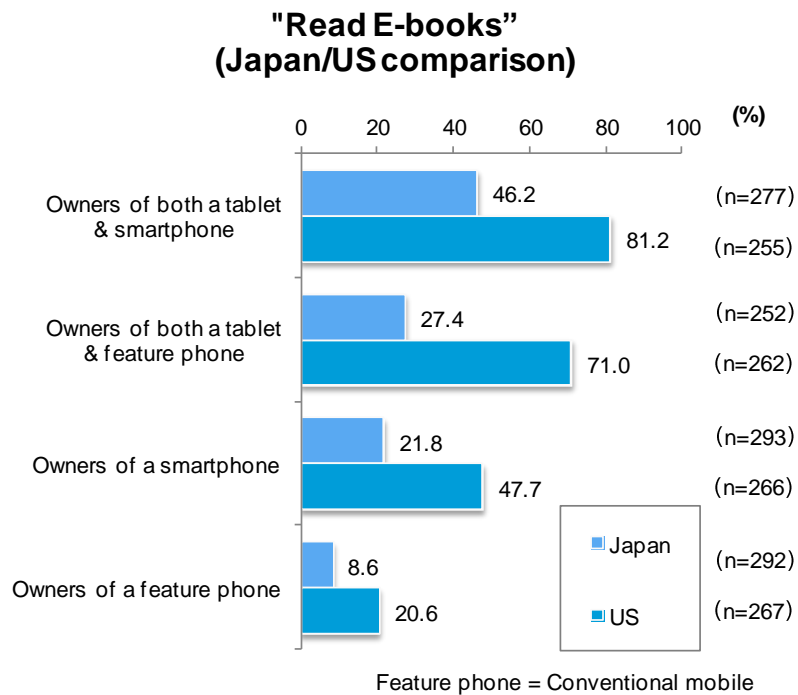
36% of US tablet owners use their tablet devices to post comments about TV programs on social media. This is greater than people who post comments using smartphones (24%). In the US, it can be said that tablet devices are starting to be used as a link between TVs and social media.

**Post comments on program content
on social media
(Japan/US comparison)**



4. Reading E-Books is Becoming an Established Common Practice in the US

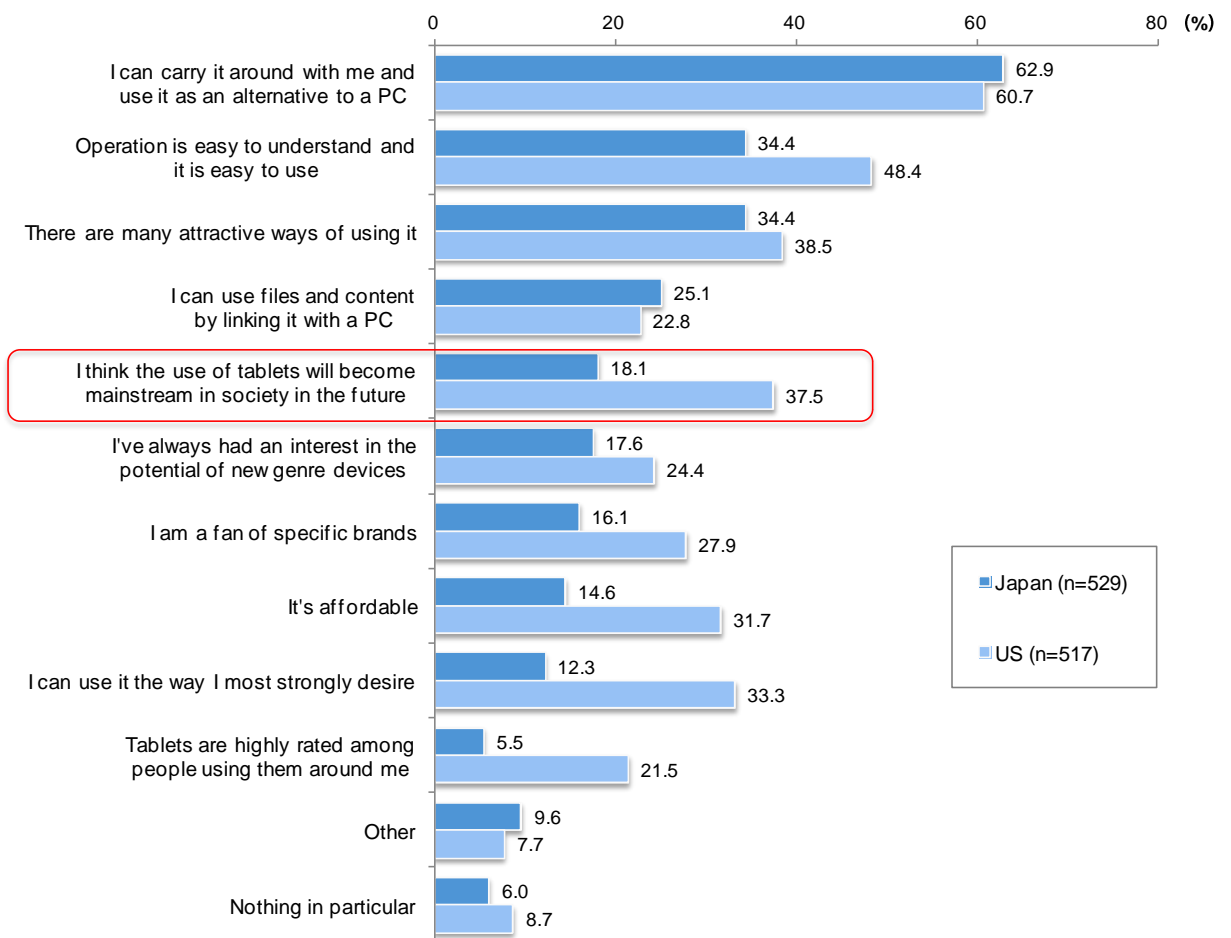
When looking into whether people read e-books by device owner attributes, the percentage of people who responded that they "read e-books" was the greatest for those who own both a tablet and a smartphone in both Japan and the US. In particular, among people who own a tablet device in the US, 70% to 80% read e-books, clearly indicating that this has become an established common practice.



5. The Rising Social Interest over Tablets is Driving the Spread

In the US, the expectation that “I think the use of tablets will become mainstream in society in the future” (38%) is higher compared with Japan (18%). Since 2010 in the US, device and service developers, as well as providers and the media in particular, have been competing aggressively, raising ideas and opinions concerning the new genre of tablets. Such circumstances are supporting the actual diffusion of tablets and are acting as driving forces.

**Reasons for owning/using a tablet
(Japan/US comparison)**



■ Conclusion: The Key for Tablets Taking Hold and Becoming Established in Japan

It has become clear that there is a big difference between Japan and the US in regard to usage image and actual usage accounted for by tablets among the multiple digital devices. Due to the great number of media content being provided for tablets in the US, the device has exceeded the role of being a device for information processing and Internet viewing, and is instead becoming seen as a new device for entertainment media, different from the PC and smartphone.

This image in the US has also been confirmed with the reading of e-books becoming a widely established common practice among tablet owners, as well as the growth of actual usage such as using the tablet to participate in social media while watching TV.

In light of the overall results, it is thought that even in Japan, the trend of using multiple digital devices for different purposes will gradually become defined over time. Some of the situations where the tablet can be expected to show its strengths include a relatively relaxing time reading e-books, and multi-screen viewing (watching a big-screen TV (main screen) while viewing related information on a tablet device (sub-screen)).

Furthermore, characteristics of tablet usage that can be seen frequently in Japan include family members taking turns using it in the house, and displaying information on the screen to view together with close friends. While the tablet will no doubt become more of a personal device even in Japan, it may still evolve as a medium where people close to each other communicate, share the same space, and enjoy sharing abundant information.

If provision of content and services helps tablet users gain hints from feelings and lifestyle scenes in the future, usage in Japan will advance even further and become established.

■ Overview of the Receptivity Comparison Survey of Tablets in Japan and the US

- Survey period: February 1 to 13, 2012 (Japan)
February 8 to 20, 2012 (US)
- Survey area: Japan (Tokyo); US (the State of New York)
- Survey method: Internet survey using an Internet survey panel
- Survey targets and sample numbers: Males and females aged 20 and over
(Details below)

Allocation condition	Detailed condition	Japan (Tokyo)	US (New York)
Tablet & smartphone owners	Smartphones: limited to devices with iOS or Android	277	255
Tablet & feature phone owners	Limited to those without a smartphone	252	262
Smartphone owners	Limited to devices with iOS or Android	293	266
Feature phone owners	Limited to those without a smartphone	292	267

This survey broadly analyzes the usage of combinations of digital media in both Japan and the US, and is not limited to a comparison of the two countries.

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