Yahoo! JAPAN Overview

Yahoo Japan Corporation  March 2021
http://global-marketing.yahoo.co.jp/
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No.1 in reach and reliability, according to third-party survey

We ranked as first, out of many companies in the previous survey again, a survey by the third-party research period "Nielsen" and "Nikkei BP Consulting."

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**Nielsen**
Tops of 2020: Digital in Japan

- Total digital reach No.1

<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand name</th>
<th>MAU Reach</th>
<th>From last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yahoo! JAPAN</td>
<td>63%</td>
<td>9pt</td>
</tr>
<tr>
<td>2</td>
<td>Google</td>
<td>60%</td>
<td>4pt</td>
</tr>
<tr>
<td>3</td>
<td>LINE</td>
<td>54%</td>
<td>6pt</td>
</tr>
<tr>
<td>4</td>
<td>Rakuten</td>
<td>47%</td>
<td>6pt</td>
</tr>
<tr>
<td>5</td>
<td>Facebook</td>
<td>43%</td>
<td>2pt</td>
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</table>

Source: Nielsen "TOPS OF 2020: DIGITAL IN JAPAN"

**Nikkei BP Consulting**
Web brand survey 2020-AW

- Total ranking No.1

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<thead>
<tr>
<th>Rank</th>
<th>Brand name</th>
<th>Score</th>
<th>From previous</th>
</tr>
</thead>
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<td>1</td>
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</tr>
<tr>
<td>2</td>
<td>Rakuten</td>
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<td>-8.4</td>
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<tr>
<td>3</td>
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<td>+2.1</td>
</tr>
<tr>
<td>4</td>
<td>YouTube</td>
<td>97.5</td>
<td>+2.6</td>
</tr>
<tr>
<td>5</td>
<td>Amazon</td>
<td>96.7</td>
<td>-1.4</td>
</tr>
</tbody>
</table>

Source: Nikkei BP Consulting “WEB brand survey 2020-AW”

It is the No.1 site tightly linked to behaviors such as purchasing and spreading information through a wide range of services related to daily life.

The increase of access under the COVID-19 disaster and our aggressive promotion of campaigns have led to increased service use and reliability. This lead to our site being highly evaluated in several surveys by third-party institutions.
Yahoo! and LINE become group companies. "Chou PayPay Matsuri (Super PayPay Festival)" promotion was held to celebrate the business integration.

Z Holdings Corporation (ZHD) and LINE Corporation integrated their operations on March 1, 2021. Yahoo Japan Corporation and LINE Corporation became group companies.

The ZHD Group, with 23,000 employees, has become one of Japan’s largest Internet corporate group that has a total of over 300 million users, 15 million corporate clients, and over 3,000 collaborations with municipalities; and that provides over 200 services in Japan.

As a result of the integration, we now cover three sources of actions that are indispensable to our daily lives; “information,” “payment,” and “communication.” Enabling people to “Achieve Even More” with the power of the Internet, the ZHD Group will create new value by solving various social issues of each individual living in each of the countries and regions, to provide convenience and to contribute to a flourishing society.

* A holding company for Yahoo Japan Corporation, one of Japan’s largest Internet service companies.
Source: Completion of the Business Integration Between Z Holdings and LINE (March 1, 2021)
3. COVID-19 awareness efforts

Efforts to raise awareness of correct understanding and countermeasures against COVID-19

With the intention of educating users about the correct understanding and countermeasures of COVID-19, we delivered a banner ad to 0.3% of the users, which is the same percentage of the total number of COVID-19 infections to the total population of Japan. We have started to display the results of vaccinations against COVID-19 in Japan in the pages you can view from the "COVID-19" tabs placed in the home pages of Yahoo! JAPAN apps and smartphone browsers.

Delivered banner ads to 0.3% of users, which is the same as the percentage of the total number of infected users

Vaccine Update on the COVID-19 tab

According to "Yahoo! News: Opinions of the People," about 60% of the users answered that they would like to be vaccinated. From this result we started this program in response to the growing interest to COVID-19 vaccine.

Source: “Yahoo! JAPAN launches an promotion to run banner ads to the 0.3% of users, which is the same as the percentage of the total population of Japan that is infected with COVID-19.” (February 24, 2021)

Source: "Yahoo! JAPAN has started to post the latest information on vaccination for COVID-19 in Japan on the "COVID-19" tab." (February 26, 2021)
4. Rejected 110 million ad creatives

Rejection of "subscription" related ads increased fourfold compared to the second half of last fiscal year.

We have released "transparency report on ad service quality" (the report) in December 2020. This report summarizes our review results to improve ad service quality for the first half of FY2020 (April 1 to September 30, 2020). We have rejected almost 110 million ads in first half of FY2020 because they conflicted with the conditions of Yahoo! JAPAN's guidelines.

According to an announcement by the National Consumer Affairs Center, there was an increase in consumer complaints caused by online shopping conditions related to subscription (continuous purchase). The Center has issued a warning to the consumers.

Although we have prohibited advertisements that may mislead users, in response to the recent increase in such consumer complaints(*2), we have strengthened our review of advertisements that make it difficult to understand the terms and conditions of subscription purchases. As a result, the number of advertisements related to subscription purchases rejected increased almost four times compared to the second half of FY 2019 (157,502 advertisements → 628,384 advertisements).

Source: Yahoo! JAPAN to reject almost 110 million ad creatives in the first half of FY 2020 (December 15, 2020)

*1: The total number of titles, descriptions, images, destination website, and keywords that were rejected due to conflict to Yahoo! JAPAN's Advertisement Editorial Guidelines, Ad insertion rules, and Sales restrictions.

*2: National Consumer Affairs Center of Japan, Changes in the number of consultations regarding "subscription purchases" of health foods and other products through online sales (Released: December 19, 2019)
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<td>- 8. Immersion to content (2)</td>
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</table>
1. What is GYAO! (1)

No registration required! One of the largest free video streaming services in Japan!

*Original content of GYAO! and 200,000 other contents of various genres are available.*

**Enjoy official videos**
All official contents are licensed and produced by professionals

**TV dramas and animations on air**
View the latest episodes of popular dramas and animations after they air on TV

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2. What is GYAO! (2)

A VOD service that streams professional contents for free

Professional content type

Free

Advertising model

GYAO!

TV stations

YouTube

TVer

Abema TV

TV stations

LINE LIVE

Twitter

Instagram

Facebook

Niconico

Charged

GYAO! store

TV stations

Hulu

dTV

Amazon Prime Video

Netflix

DAZN

Professional contents: An official contents licensed and produced by professional creators.
Monthly visitors

*Source: researched by Yahoo! JAPAN (Calculated by visitor UB, December, 2020)*
Users with a high interest in entertainment in general has a reliance on long sellers, and a tendency to place value on branding

- Likes movies, music, anime/manga, and shopping
- Use Yahoo! JAPAN and its derivative contents very often
- Prefer to use familiar things
- A frequent collector of information and keeps updated with the latest information
- Key points: orthodox, long seller, price, and brand
- Health conscious
- Clean and neatly dressed at all times

**Interests**

- Music: 14%
- Travel: 13%
- Entertainment: 14%
- Sports & outdoors: 6%
- Shopping: 6%
- Computer & technology: 8%
- Health and medicine: 8%
- Business: 6%
- Home & family: 5%
- Investment & finance: 2%
- SOHO & Venture: 2%

*Based on internal logs (viewing area: June 2019, occupation and affinity: November 2018)
*The percentage of affinity is calculated based on the access logs of users who have registered the "Affinity" item in their Yahoo! JAPAN ID.

**Annual income and assets**

- **GYAO!**
  - Individual income: 3.48M JPY
    - Of which, 5.2% accounted for more than 10 million JPY
  - Financial assets: 11.63 million JPY

- **UGC Video Media A**
  - Individual income: 3.13M JPY
    - Of which, 3.3% accounted for more than 10 million JPY
  - Financial assets: 10.4 million JPY

- **TV program broadcast media B**
  - Individual income: 3.29M JPY
    - Of which, 3.1% accounted for more than 10 million JPY
  - Financial assets: 10.42 million JPY

- **Hybrid video media C**
  - Individual income: 3.07M JPY
    - Of which, 1.8% accounted for more than 10 million JPY
  - Financial assets: 8.93 million JPY

*Macromill, Inc. "GYAO! User Profiling Survey" (June 2015):
An online survey of Macromill monitors. A user is defined as someone who uses GYAO! on a PC or smartphone at least once a month.

- There are many users with annual incomes of 10 million yen or more, and the average annual income of individuals is high.
- GYAO! users have large financial assets

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The animation and variety category has a high percentage of young female.

*Source: researched by Yahoo! JAPAN (Calculated by viewer UB, December, 2020)
Movies, dramas, and animations make up 90% of all viewing genres.

Percentage of time spent watching GYAO!

- Movies: 17%
- Dramas: 38%
- Aminations: 35%
- Music: 2%
- Talk shows and sports...: 2%

Average viewing time per user

- Movies: 50min
- Dramas: 75min
- Aminations: 47min

*Source: researched by Yahoo! JAPAN (December, 2020)
GYAO!" is less likely to be "viewed doing something else" and nearly 90% tend to "view only." Immersion to content is high.

Q. Where and when do you watch videos of each media. (All that apply) (Users who use at least once a month)

*Research by GYAO!, Internet survey of publicly solicited survey participants (June 2020).
Rather than during commute to work or school, people tend to watch at home before bedtime, when their privacy is secured.

Q. Where and when do you watch videos of each media. (All that apply) (Users who use at least once a month)

Enjoying movies while relaxing before bed.

*Research by GYAO!, Internet survey of publicly solicited survey participants (June 2020).
Brand damage caused by placing ads on inappropriate ad placements is an issue.

You will need to select a good ad placement to protect your brand from damage.
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Excellent quality and number of services with wide range of users One of the largest media size in Japan

From smartphone payment to search, maps and knowledge services of over 100 has a wide variety. Providing over 70 billion page views per month, we are one of the largest media in Japan.

More than 100 services

Monthly page views

About 81 billion

*Source: researched by Yahoo! JAPAN (March, 2021)
You can reach 80% of smartphone users and 60% of PC users. Covering Japan with overwhelming reach

You can reach 90% of smartphone users and 60% of PC users of Japan's internet users. With approximately 70 million monthly active users on smartphones and 20 million on PCs, the site is used by a large number of people.

Active reach rate for Yahoo! JAPAN among smartphone users (82 million*) in Japan

Page views (monthly average) | MAU (Active users per month)
---|---
60 Billion PV | 70 million UU

Active reach rate for Yahoo! JAPAN among PC users (32 million*)

Page views (monthly average) | MAU (Active users per month)
---|---
21 Billion PV | 20 million UU

*Yahoo! JAPAN active reach ratio among PC users in Japan (32 million*)

Source: Page views: researched by Yahoo! JAPAN, data period : Average of July to December 2020 (Tablets and conventional mobile phone excluded)
*Source: Calculated by Yahoo! JAPAN from “Nielsen NetView/Mobile NetView Custom Data Feed.”
*2 “Nielsen NetView” via PC access from both home and office (does not include internet Apps) average of July – December 2020 data summarized at brand level
*1 “Nielsen MobileNetView” access from smartphones (including app use) average of July – December 2020 data summarized at brand level
*Calculated by rounding up the top two or top three significant figures.

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More than 9 billion search terms. Japan's top-class multi-big data

Yahoo! JAPAN's data is one of the largest in Japan with its cross-service and user scale. Over 9 billion search term variations with behavior history covering search, browsing, shopping and payments. High quality big data based on user insights.

*Source: researched by Yahoo! JAPAN (FY2020)
To use where ever, when ever. Used in various life scenes

A wide variety of users use Yahoo! JAPAN. Users have a reason to use as many services as they want. We provide vertical services to respond to various user needs, making Japan more convenient.

- It helped me to move around the city with the shortest route.
- So easy to find outfits I want. It’s a must-have service.
- I read the news before work.
- I search many products. I get the chance to find what I want.
- Helps to know what is popular in social media.
- The rain cloud radar saved my laundry getting all wet from rain.

Source: researched by Yahoo! JAPAN (April, 2018)
For the user’s sense of security. “Improve service quality” “Improve ad quality”

Yahoo! JAPAN is working on anti-fraud measures and media integrity to improve user satisfaction. We also focus to maintain and improve the quality of advertising so that both users and advertisers can use our site with safety.

Countermeasures against inappropriate comments on Yahoo! JAPAN News

To create a healthy public dialogue space, Yahoo! JAPAN News takes a variety of measures. In addition to patrols by a team of experts, we use a "natural language processing model (AI)." We delete an average of about 20,000 inappropriate postings per day, including slander.

Source: The effects of AI warning messages for posting comments on Yahoo! JAPAN News(February 16, 2021)

Yahoo! JAPAN News has been using AI to display warning messages when users post their comments. Accounts that repeatedly post inappropriate comments have decreased 13.5% after displaying the warning messages.

“Ad service quality” improvement

Yahoo! JAPAN aims to provide service that will satisfy internet users, advertisers, and our partners. We will work on for clarity and quality improvement and provide information and as regularly as possible.

Diamond of advertising quality:

Yahoo! JAPAN has stated "three values and six measures" to face the issues the Japanese digital advertising carries, such as ad frauds and brand safety.

Source: <https://global-marketing.yahoo.co.jp/diamond.html>
In Japanese <https://yahoo.jp/M088u>

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About 70 million active users for smartphone and about 20 million active users for PCs per month. Used among many people.
You can reach 80% of smartphone users and 60% of PC users. Best media in Japan to reach the users.

<table>
<thead>
<tr>
<th>Company</th>
<th>Reach (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google</td>
<td>94.1</td>
</tr>
<tr>
<td>LINE</td>
<td>84.1</td>
</tr>
<tr>
<td>YouTube</td>
<td>80.6</td>
</tr>
<tr>
<td>Facebook</td>
<td>71.5</td>
</tr>
<tr>
<td>Twitter</td>
<td>57.4</td>
</tr>
<tr>
<td>Instagram</td>
<td>56.2</td>
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Source: Calculated by Yahoo! JAPAN from "Nielsen NetView Custom Data feed."

*2 "Nielsen NetView" via PC access from both home and office (does not include internet Apps) average of July – December 2020 data summarized at brand level
*1 "Nielsen MobileNetView" access from smartphones (including app use) average of July – December 2020 data summarized at brand level
*Calculated by rounding up the top two or top three significant figures.

© 2021 Yahoo Japan Corporation All rights reserved.
A media that covers every part of the country from the north to the south.

Source: Calculated by Yahoo! JAPAN from "Nielsen NetView Custom Data feed."

*1 "Nielsen MobileNetView" access from smartphones (including app use) average of July – December 2020 data summarized at brand level
*2 "Nielsen NetView" via PC access from both home and office (does not include internet Apps) average of July – December 2020 data summarized at brand level
*Value is rounded after the decimal place, and the sum may not be 100.
No.1 in both morning and evening use. Covers all life scene from the morning commute to bedtime relaxation.

Source: Calculated by Yahoo! JAPAN from "Nielsen NetView Custom Data feed."

*2 "Nielsen NetView" via PC access from both home and office (does not include internet Apps) average of July - December 2020 data summarized at brand level

*1 "Nielsen MobileNetView" access from smartphones (including app use) average of July - December 2020 data summarized at brand level
We can reach users of all ages and gender.
Used among wide range of user classes from average income class to affluent class.

### 5 million - under 8 million JPY

<table>
<thead>
<tr>
<th>Platform</th>
<th>User Count (in 10 thousands)</th>
<th>Yahoo! JAPAN</th>
<th>LINE</th>
<th>Google</th>
<th>Youtube</th>
<th>Facebook</th>
<th>Twitter</th>
<th>Instagram</th>
</tr>
</thead>
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### more than 8 million JPY

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<th>LINE</th>
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<td>1200</td>
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Source: Calculated by Yahoo! JAPAN from "Nielsen NetView Custom Data feed."

*1 "Nielsen MobileNetView" access from smartphones (including app use) average of July – December 2020 data summarized at brand level

*2 "Nielsen NetView" via PC access from both home and office (does not include internet Apps) average of July – December 2020 data summarized at brand level

*Calculated by rounding up the top two or top three significant figures.
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# Issues and solutions

## Making an impression as priority
- Maximize reaches
- Lift of awareness
- Leave an impression with overwhelming impact
- Create a buzz
- Increase favorability
- Introduce products and services
- Complementing TV reach and promoting action using video

## Understanding as priority
- Audience targeting by affinity and attribute
- Sales measures, store visit promotions
- Deliver information to the people looking for it

## Acquisition efficiency as priority
- Deliver ads to the user who is browsing the contents page.
- Targeting for different goals
- Using Pay Pay. Recognition by online and promote purchase offline. Entire process in one
- Display ads related to searched keyword on search result page

### Display Ads (Guaranteed)
- No.1 reach in Japan, delivery to multi device (Number of estimated maximum reaches: approx. 30 million)
- Express the brand’s concept by taking over the top page
- The attitude change increases in proportion to the impact upon contact.
- Create and deliver ads based on data analysis to match the targeted audience’s tastes
- Widely deliver videos with high completion rate created by Shin R25. (Whether it’s a content or advertising, users are willing to watch to the end if they’re interested)
- Promote awareness by running the same promotion on Yahoo! JAPAN during the commercial period. Encourage action by setting a CTA button.

### Display Ads (Auction)
- Targeting

### Search Ads
- Yahoo! JAPAN Sales promotion

### Display Ads (Guaranteed)
- Brand Panel
- Top Impact Panorama
- Top Page Customize
- JIBUN CM (Self commercial)
- Yahoo! JAPAN ADPLUS

### Video ads best practice
- "Video for Action"

* Please ask our sales representatives.
Customer Support

Yahoo! JAPAN Ads

Products: Search Ads, Display Ads (Auction), Display Ads (Guaranteed)

Inquiry about sign up
https://form-business.yahoo.co.jp/claris/enqueteForm?inquiry_type=global_marketing_2121&lang=en&o=OM1161

Inquiry form for advertisers
https://promotionalads.yahoo.co.jp/support/contact/index.html

Other services

Products: Yahoo! JAPAN DMP, Yahoo! JAPAN sales promotion

- Sign up for Yahoo! JAPAN DMP
  https://form-business.yahoo.co.jp/claris/enqueteForm?inquiry_type=dmp_contact_5321

- Inquiry for Yahoo! JAPAN sales promotion
  https://form-business.yahoo.co.jp/claris/enqueteForm?inquiry_type=salespromotion-support

* It may take a few days to reply.