

Smart Outdoor Watch –

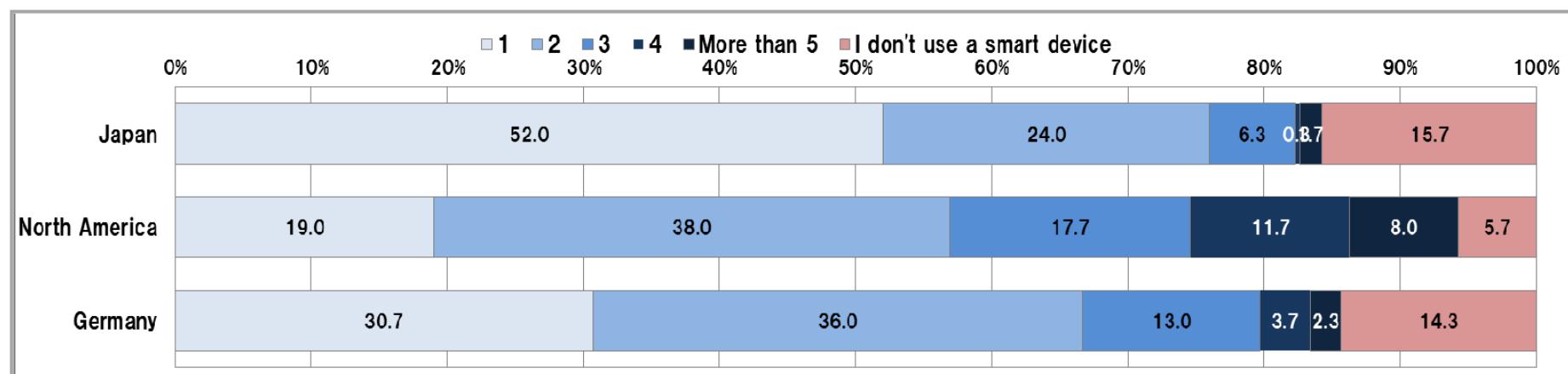
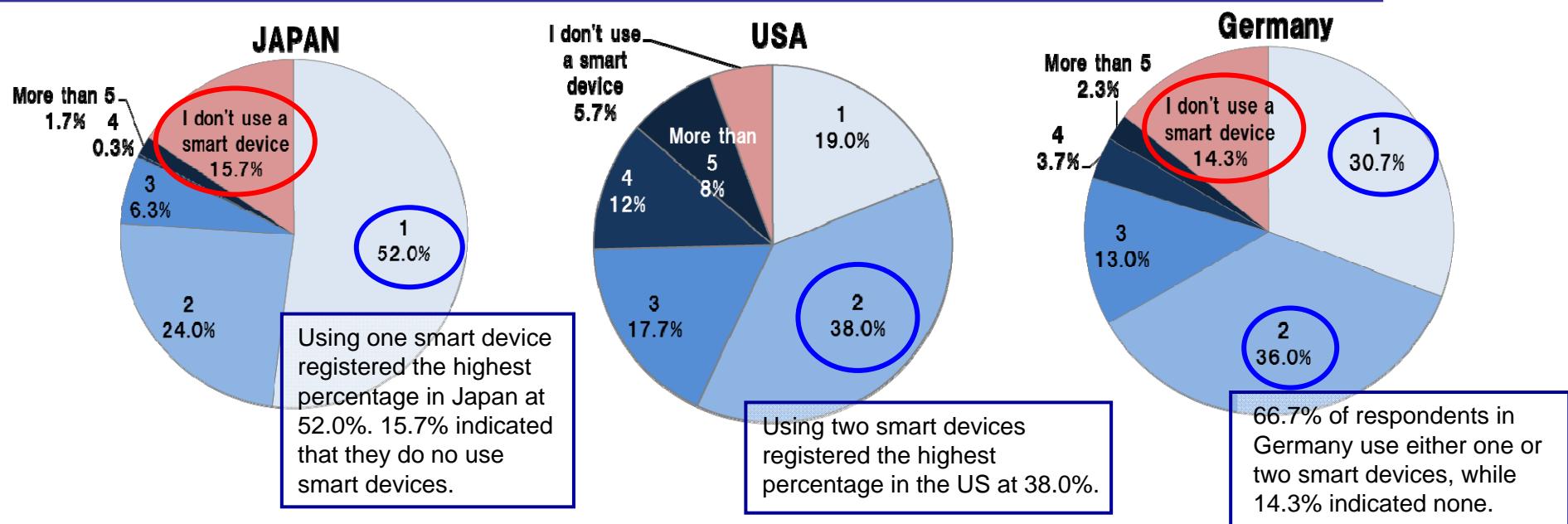
Consumer Survey Report

Survey Overview

- Regions surveyed: Japan / USA / Germany
■ Persons surveyed: Fathers aged between 20 to 59 who enjoy outdoor activities
■ Types of outdoor activities that the fathers do with their children:
- Sea bathing / Playing on the beach, etc.
 - Mountain climbing / Trekking
 - Hiking / Picnicking
 - Camping / RV camping
 - Fishing
 - Surfing / Scuba diving / Other marine sports
 - Canoeing / Kayaking / Rafting / Other river activities
 - Skiing / Snowboarding / Other winter sports
 - Athletic activities / Exercising outdoors
 - Cycling / Touring / Cross-country biking / Downhill biking, etc.
 - Sky sports (Paragliding / Sky diving)
 - Bouldering
 - Hunting
 - Bird watching
- Survey period: 2016/4/25 ~ 2016/4/27
■ Survey method: Online survey
■ Number of respondents: 900 respondents (300 per region surveyed)
■ Survey contractor: GfK Custom Research Japan

		Men 20・29	Men 30・39	Men 40・49	Men 50・59
Japan	300	5	45	149	101
USA	300	59	129	69	43
Germany	300	27	78	105	90

■ Q1 How many smart devices (smartwatch, smartphone, tablet, etc.) do you usually use?
Please also include devices you use for work.



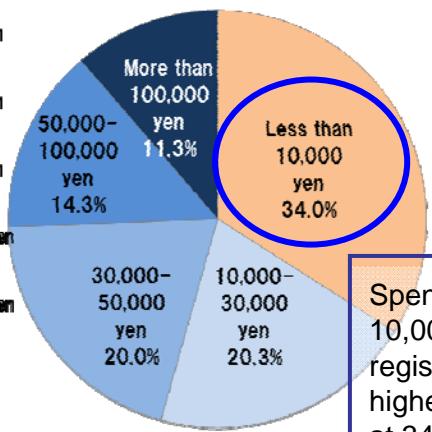
■ Q2 How much money do you spend on outdoor activity goods in a year?

How much would you like to spend if your circumstances (i.e. Your wife or partner) allowed?

■ Amount you spend in a year

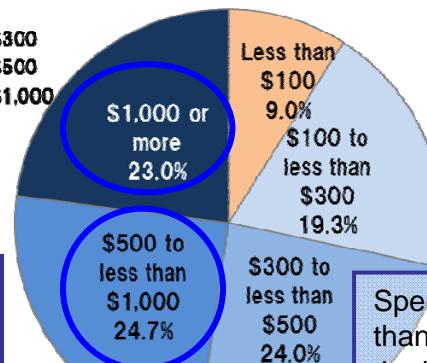
JAPAN

- Less than 10,000 yen
- 10,000–30,000 yen
- 30,000–50,000 yen
- 50,000–100,000 yen
- More than 100,000 yen



USA

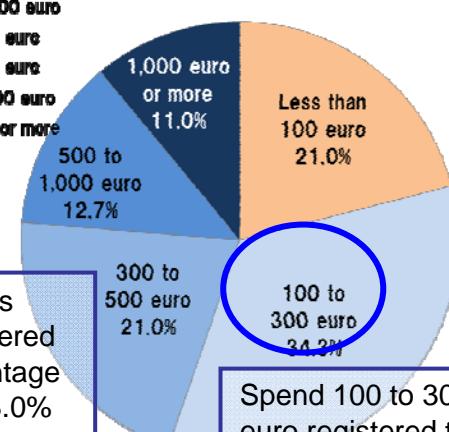
- Less than \$100
- \$100 to less than \$300
- \$300 to less than \$500
- \$500 to less than \$1,000
- \$1,000 or more



Spend less than 10,000 yen registered the highest percentage at 34.0%.

Germany

- Less than 100 euro
- 100 to 300 euro
- 300 to 500 euro
- 500 to 1,000 euro
- 1,000 euro or more

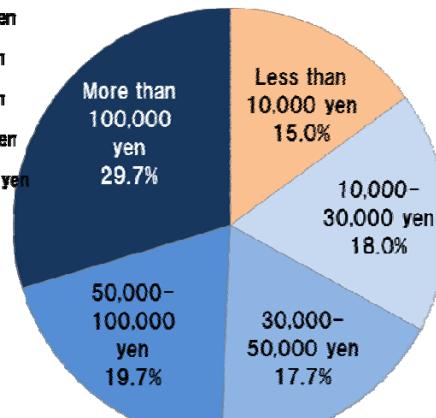


Spend 100 to 300 euro registered the highest percentage at 34.3%.

■ Amount you would like to spend in a year if circumstances allowed

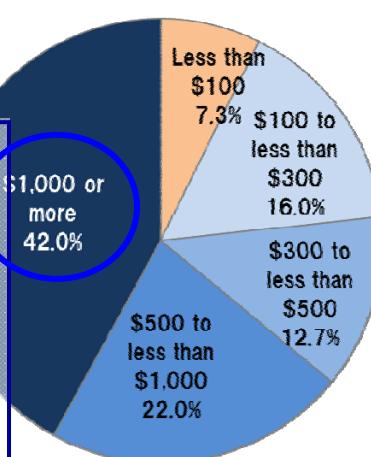
JAPAN

- Less than 10,000 yen
- 10,000–30,000 yen
- 30,000–50,000 yen
- 50,000–100,000 yen
- More than 100,000 yen



USA

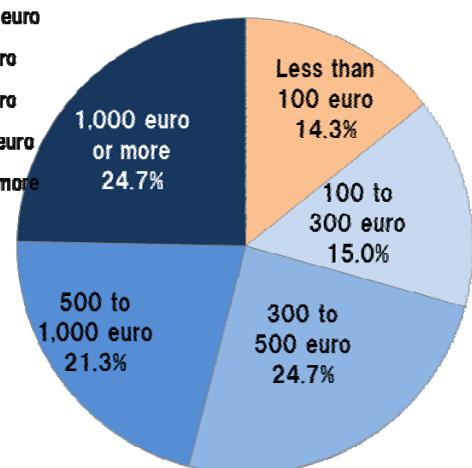
- Less than \$100
- \$100 to less than \$300
- \$300 to less than \$500
- \$500 to less than \$1,000
- \$1,000 or more



Spend \$1,000 or more responses increased to 42.0% if circumstances allowed, indicating that interest in outdoor goods is highest in USA.

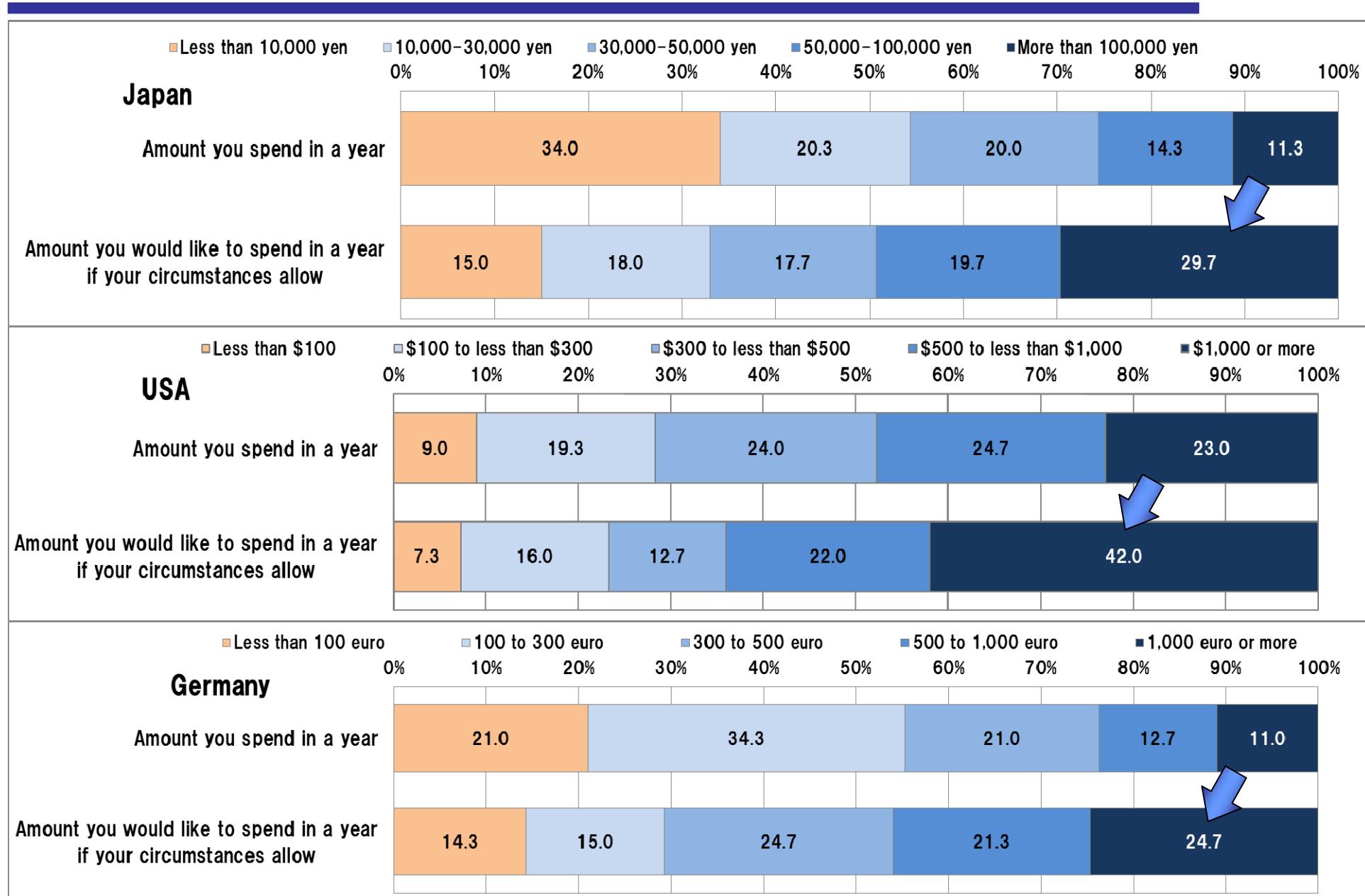
Germany

- Less than 100 euro
- 100 to 300 euro
- 300 to 500 euro
- 500 to 1,000 euro
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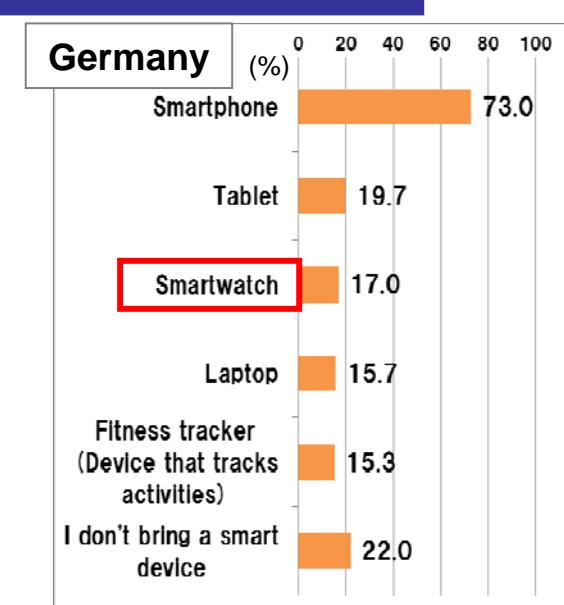
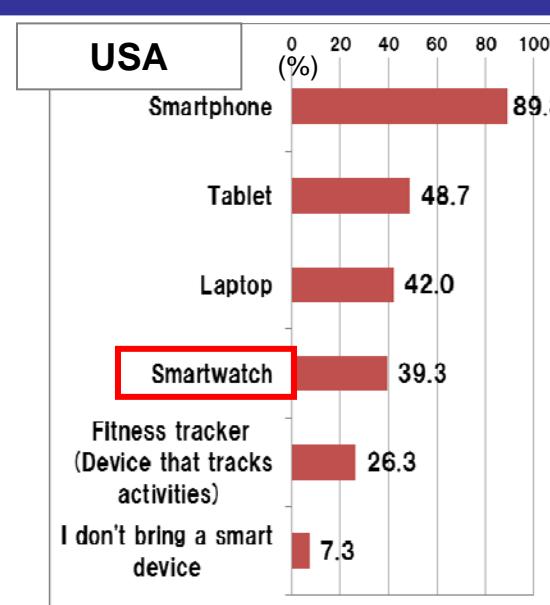
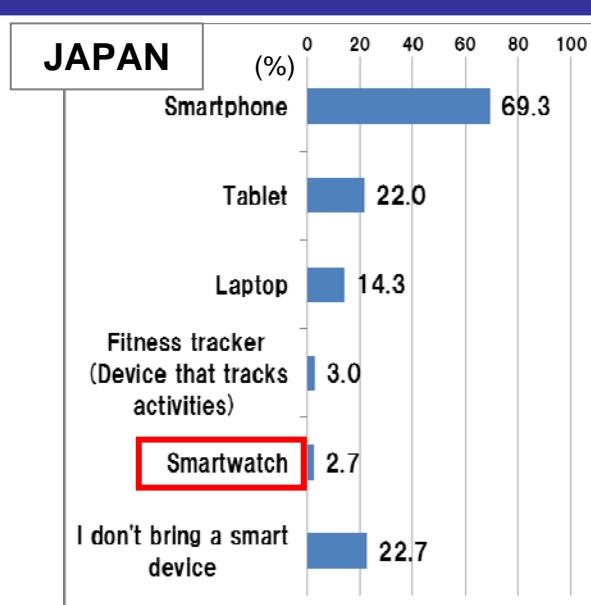


■ Q2 How much money do you spend on outdoor activity goods in a year?

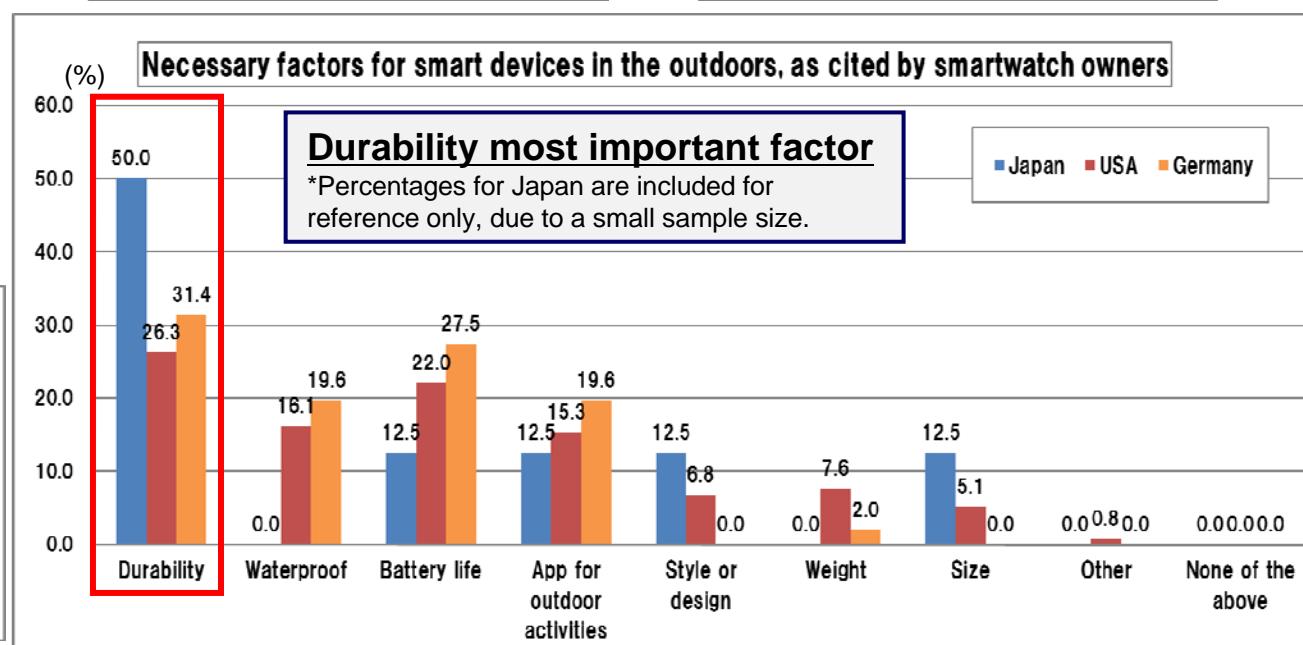
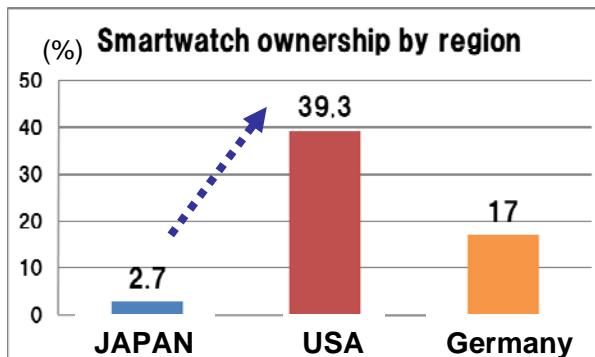
How much would you like to spend if your circumstances (i.e. Your wife or partner) allowed?



■ Q3 What smart devices (smartwatch, smartphone, tablet, etc.) do you bring for outdoor activities?
 (Please select all that apply)

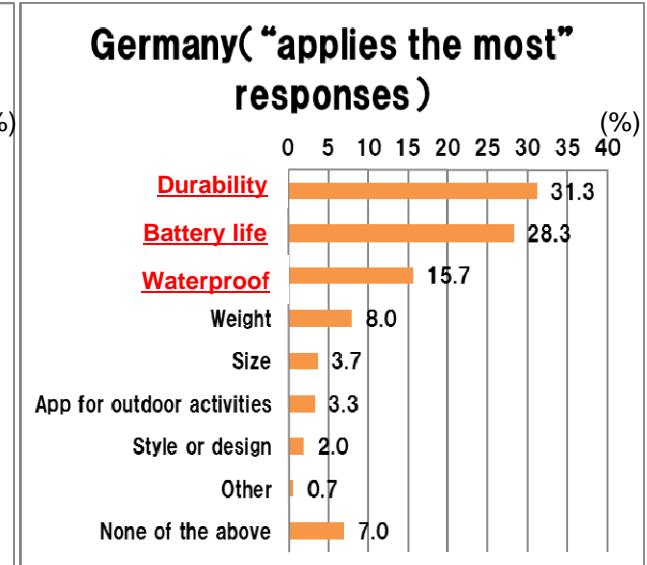
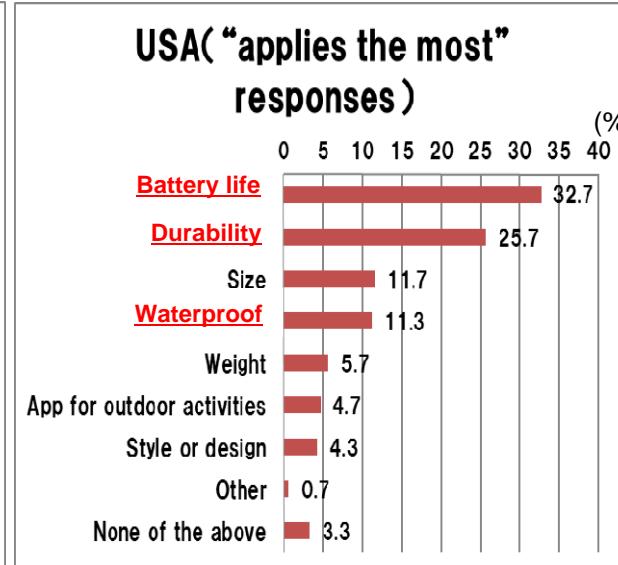
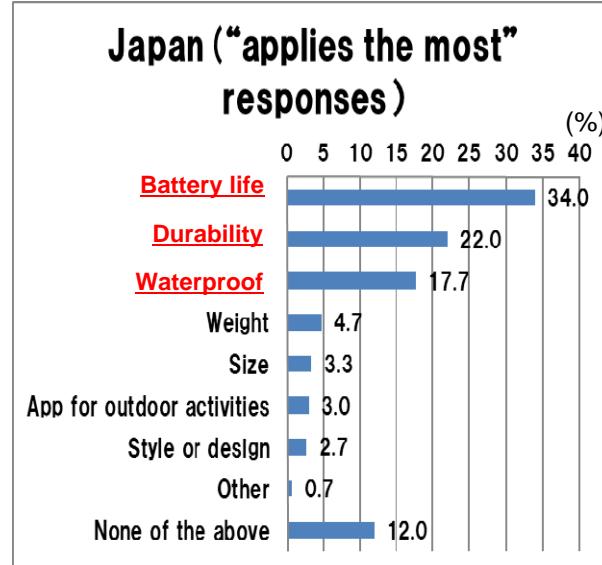
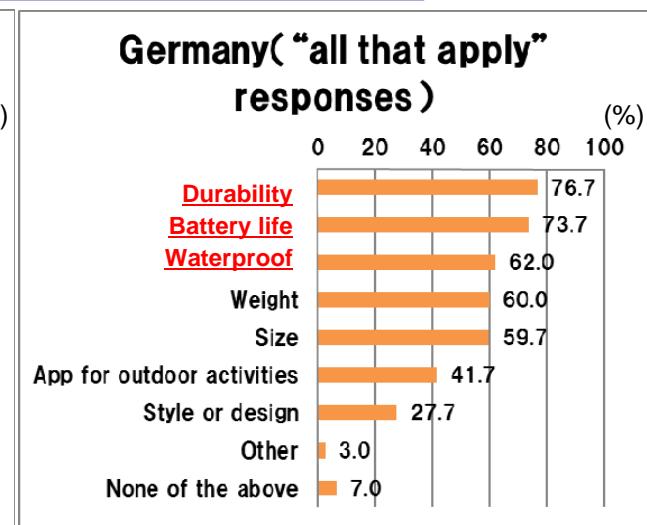
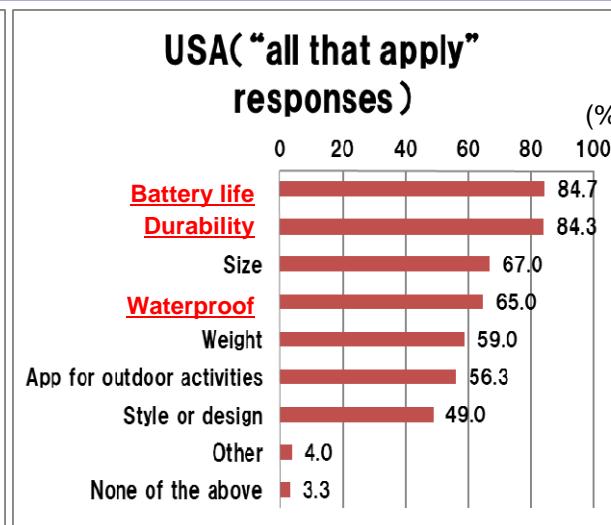
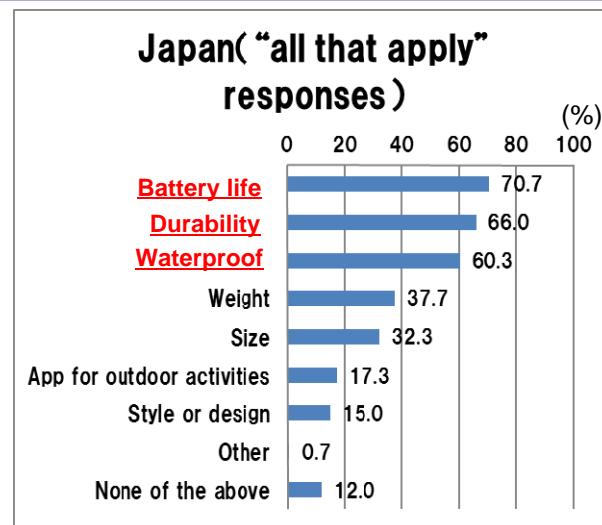


The percentage of respondents who bring a smartwatch for outdoor activities was 2.7% in Japan, 39.3% in America, and 17.0% in Germany, reflecting low smartwatch ownership in Japan compared with higher rates of ownership in USA and Germany.



■ Q4 What factors must a smart device (smartwatch, smartphone, tablet, etc.) have before you consider using a smart device for outdoor activities?

*If you answered "I don't bring a smart device", please answer assuming that you bring one



Battery life, durability, and waterproof were the highest ranking factors in all three regions. **Durability was the most important factor in Germany**

- Q5 How much time per week do you spend with your child(ren) doing outdoor activities on average?
How much time do you think should be spent to strengthen parent-child bonding?
-

Actual vs. desired time spent outdoors

Japan: **46.9%** USA: **81.0%** Germany: **74.5%**

North America registered the smallest gap between actual time spent outdoors with children, versus the time they think they should spend. Japan registered the largest gap.



Average time spent outdoors per week with children:

2.15 hours

Average time per week that fathers wished they could spend outdoors with their children:

4.58 hours



Average time spent outdoors per week with children:

7.42 hours

Average time per week that fathers wished they could spend outdoors with their children:

9.15 hours



Average time spent outdoors per week with children:

4.06 hours

Average time per week that fathers wished they could spend outdoors with their children:

5.45 hours

Combined average for all three regions

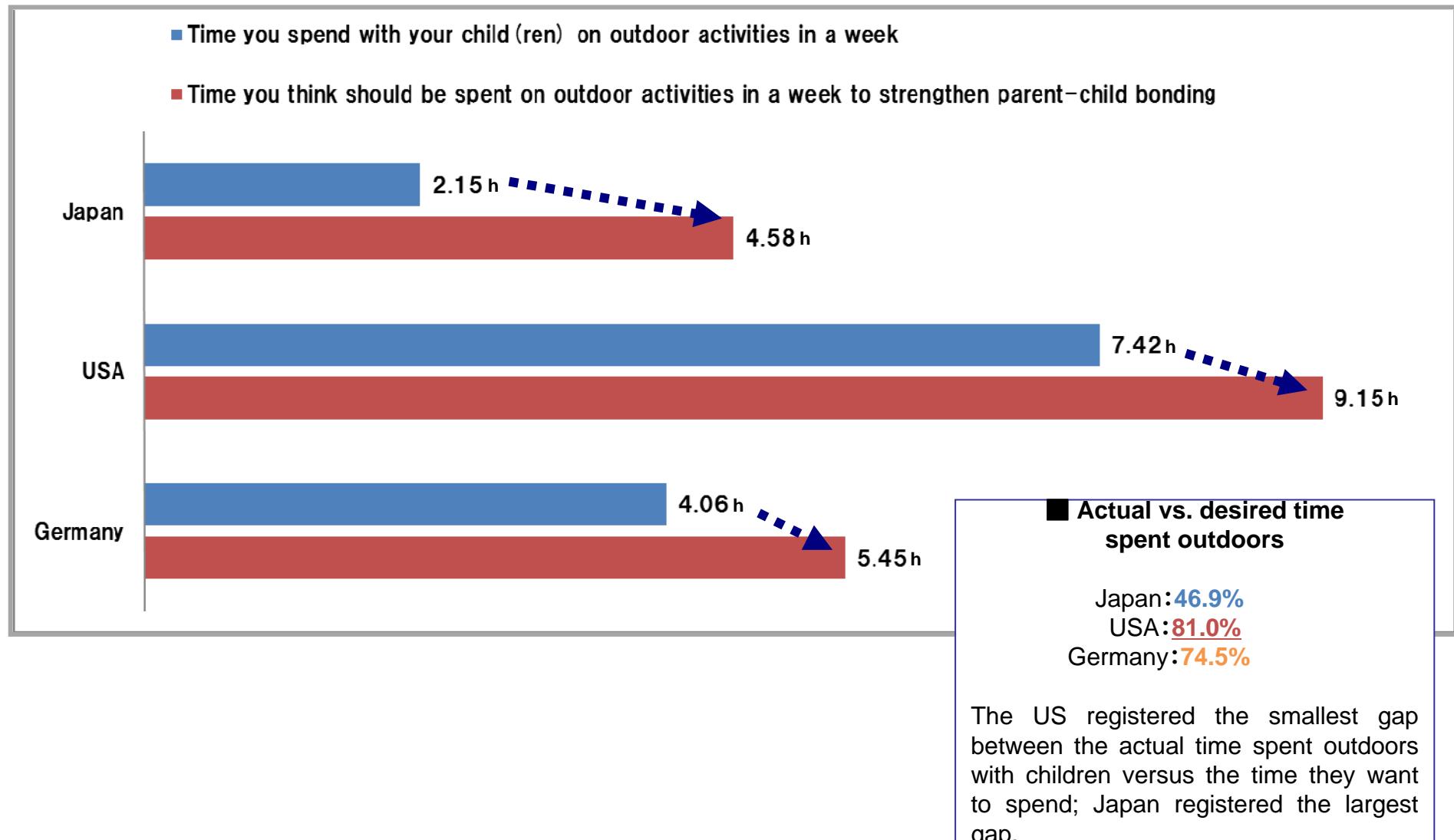
Average time spent outdoors per week with children:

4.54 hours

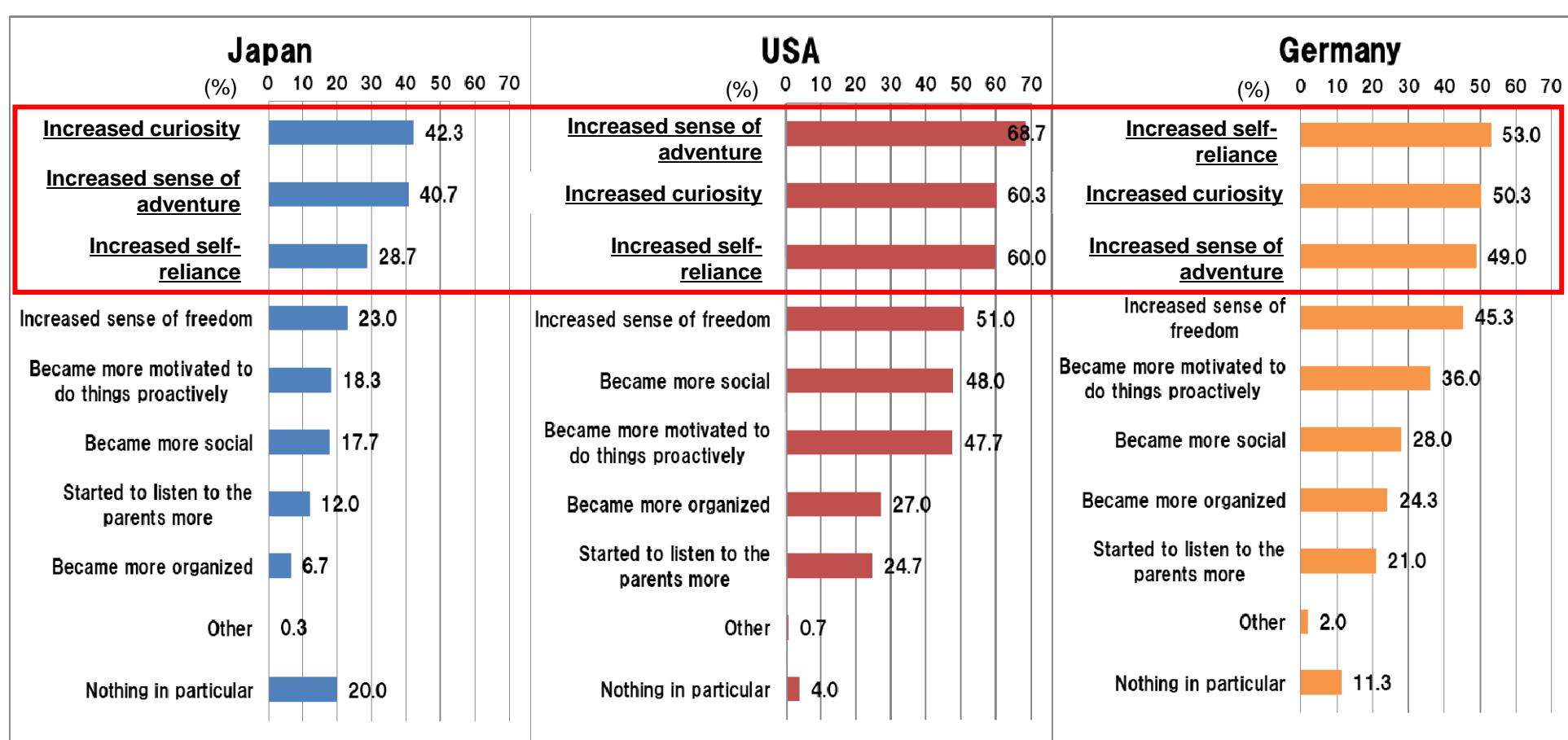
Average time per week that fathers wished they could spend outdoors with their children:

6.39 hours

- Q5 How much time per week do you spend with your child(ren) doing outdoor activities on average?
How much time do you think should be spent to strengthen parent-child bonding?



■ Q6 How did your child(ren) change after engaging in outdoor activities?
 (Please select all that apply)



Increased curiosity, increased sense of adventure, and increased self-reliance were the most cited responses in all three regions. This indicates that fathers in all three regions share common attitudes.

■ Q7 How many hours of outdoor activities with your friends would you trade for one hour of outdoor activities with your child(ren)?



Fathers would trade

3.83 hours

with their friends for
1 hour of outdoor activities
with their children



Fathers would trade

5.80 hours

with their friends for
1 hour of outdoor activities
with their children



Fathers would trade

2.92 hours

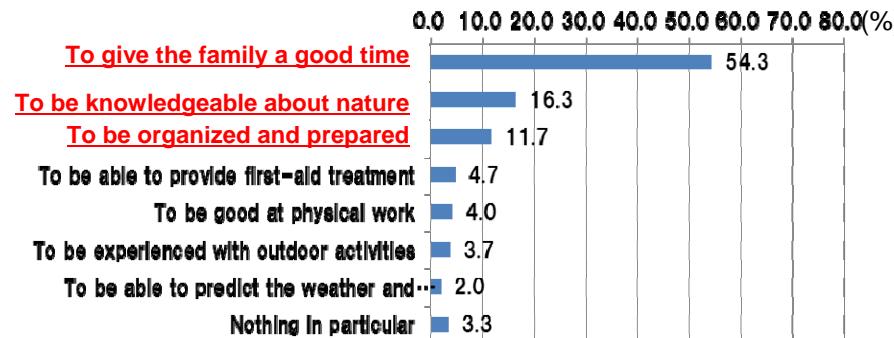
with their friends for
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Combined average for
all three regions

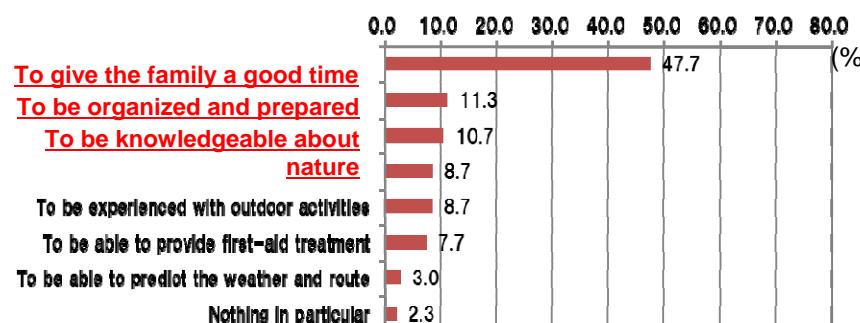
4.18 hours

■ Q8 How can outdoor adventures define the role of fathers?

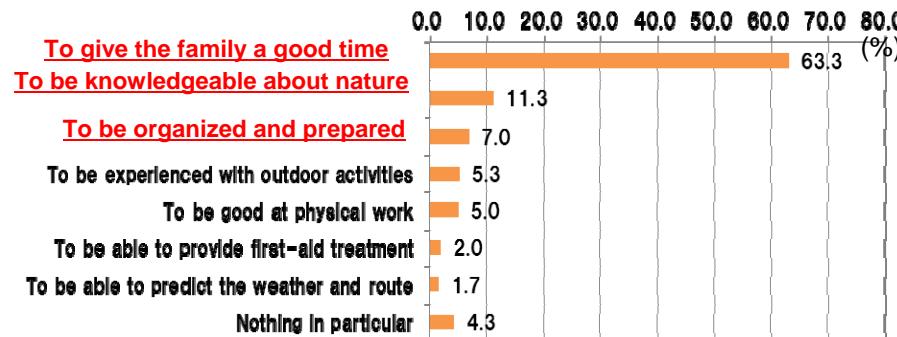
Japan(Applies the most (Select one))



USA(Applies the most (Select one))

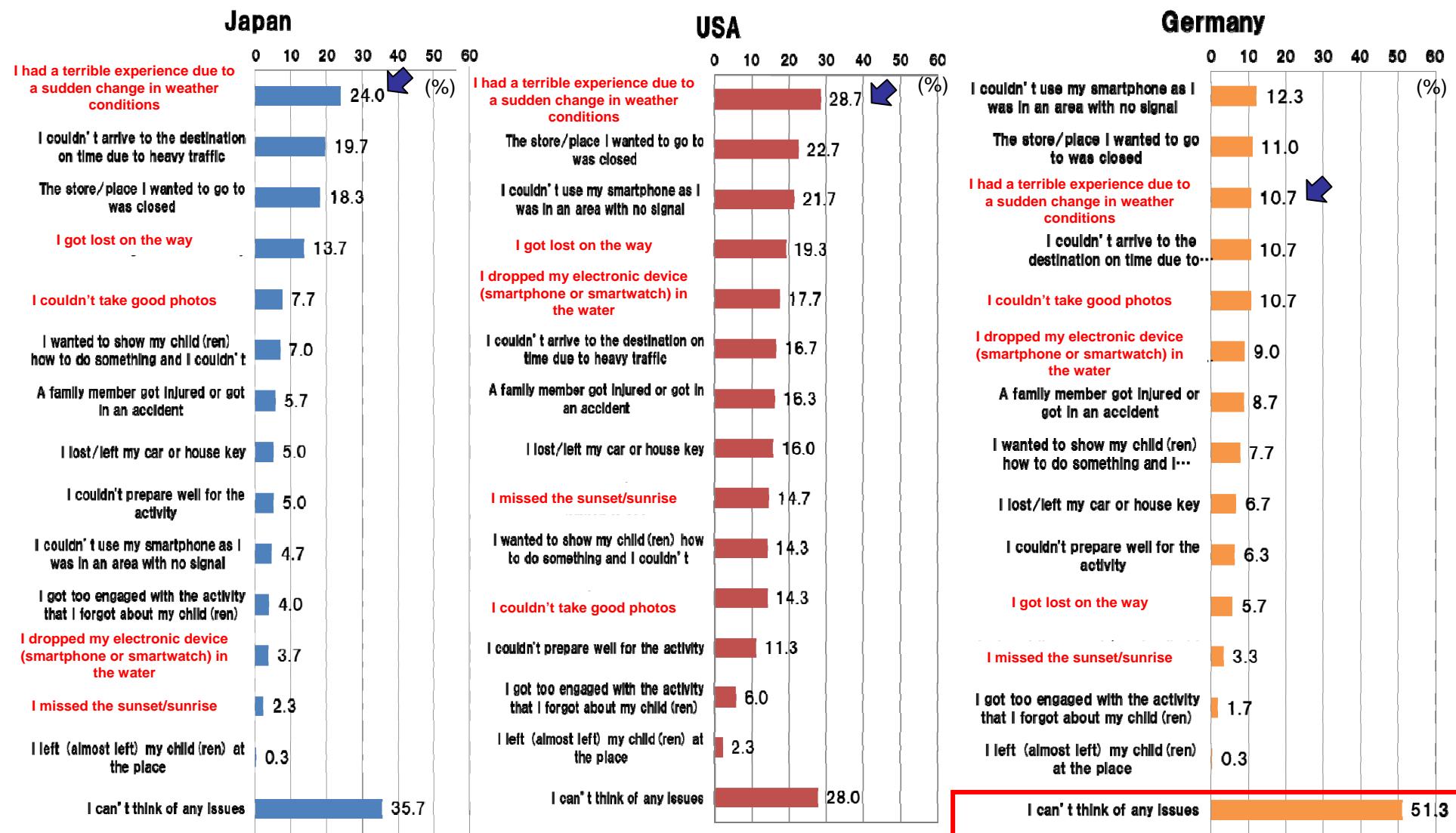


Germany(Applies the most (Select one))



In all three regions, fathers believe **creating a fun time for their family** was the top role. The second highest response was **to be knowledgeable about nature** and the third was **to be organized and prepared**.

■ Q9 Have you ever felt that you made a mistake when you went for an outdoor activity with your child(ren)?



Many respondents had terrible experiences due to a **sudden change in the weather conditions**. 51.3% of respondents in Germany couldn't think of any issues, which was higher than in other regions.

■ Q10 Did you face any issues or face unexpected events when engaged in outdoor activities?
What kind of activity, what happened, and how?



- My smartphone battery died, so we could not use outdoor apps.
- I dropped my smartphone into the water.
- I got soaked in the tent due to a sudden rainstorm.
- We had to change our schedule and stay an extra night because of sudden rain.
- The weather was good and everything went well at first, but it suddenly started to rain once we had prepared our meal.
- Bad weather spoiled the mood of our trip.
- We were disappointed that we could not see the stars because the weather changed suddenly.
- We had to spent the night in our car because the weather changed suddenly.
- The tent was flooded because of a sudden heavy rain.
- A heavy thunderstorm kept us confined to our tent.
- I was so into playing with my kids that I lost my keys without noticing. I could not get back into my car.
- I went strawberry picking, but when we arrived we missed the starting time and there were no more strawberries left.
- I had no idea where our parking spot was, so we ended up behind schedule and could not do the outdoor activities we had planned.
- We made meals outdoors but it tasted terrible.
- I had a trouble with my son when he was in a junior high school as he entered his period of rebelliousness. After his graduation, we planned a family trip but he canceled at the last minute, though we had already paid for everything.
- When I got lost, a stranger showed us the way but it was for a different place with the same name.
- My children were very panicked when horseflies got inside our tent.
- When we put snacks outside the tent at the beach, a kite stole them.

■ Q10 Did you face any issues or face unexpected events when engaged in outdoor activities?
What kind of activity, what happened, and how?



- It was raining so we could not do activities outdoors.
- There was suddenly a severe thunderstorm and hail. The strong winds destroyed our tents and cut our adventure short.
- We were caught in a sudden thunderstorm when hiking up a mountain.
- The battery in our camera battery died.
- We lost track of time and could not see the sunset.
- I was trying to show my kids a place that I love, but the sun was not out.
- We went hiking in the mountains with my wife and son, but a thunderstorm came so we had to leave early.
- The weather changed suddenly and it snowed inside our cabin.
- My watch fell into the water and broke.
- I was climbing with my son one Sunday morning and the weather was great. But it suddenly started to rain and on the way back my son fell and got injured.
- The battery in our device died and our pictures didn't turn out very well.
- It started raining and forced us change our initial plans.
- I lost my keys.
- My wife and I were mountain biking, but my wife popped a tire, which caused her to lose control of her bicycle. She slipped and fell about 20 meters, and slightly dislocated her ankle. She had to be airlifted by a helicopter because the location was remote.
- I went to the mountains with my children and some friends. Our way back I was looking for my house keys and realized that I had lost them.
- We went for a picnic and after finding a good place we began setting up our things. We then noticed that we were sitting near a ant hill so we had to change our place as quickly as possible.
- My son touched a jellyfish, which caused him severe pain.

■ Q10 Did you face any issues or face unexpected events when engaged in outdoor activities?
What kind of activity, what happened, and how?



- We dropped our phone when we were crossing a stream.
- While we were hiking, the pass was blocked so we had to take a detour in bad weather.
- We got lost because we did not check the route beforehand and it took 8 hours to return home.
- There was no radio signal and the hotel was closed due to rain.
- My phone died during our trip.
- We were hit by a blizzard.
- We arrived in a heavy thunderstorm and we didn't have the right clothing.
- For the first time in my life, I became hopelessly lost. When I was about to give up, a farmer drove me to the correct parking lot.
- I should have made my children feel more relaxed, but I failed.
- My shoes were worn out.
- My daughter hurt her knees.
- It was terrible to lose my car key in the outdoors.
- When we went fishing, we broke the fishing equipment by mistake. Although the financial loss was annoying, I still enjoyed the experience.
- I wanted to show my children how to fish but I failed.
- We had to repair our bicycle tires.