

Feature

HISTORY OF PANEL SURVEYS

Panel surveys are core products of the INTAGE Group. We have undergone numerous hardships throughout our history, but these surveys have now become our flagship products that generate stable revenue. Leading examples of these surveys include the SCI (Nationwide Consumer Panel Survey) service launched in 1964 and SRI+ (Nationwide Retail Store Panel Survey), which was launched in 1994. In 2024, we celebrated the 30th anniversary of SRI+ and the 60th anniversary of SCI. We used this as an opportunity to look back at the history of our panel surveys.

Evolution of our panel surveys

Retail store panel

Consumer panel



Nationwide Drugstore Tracking Survey

1960 Started as drug inventory research



1980 Launch of the POS project

1993 Introduction of a hybrid method combining POS data and inventory research

1997 Launch of a service using POS data from all stores



Nationwide Retail Store Panel Survey

1994 Launch of Nationwide Retail Store Panel Survey with POS data targeting food and everyday sundries (1,170 stores)

1997 Launch of Integrated SRI with the addition of liquor, pet and other specialty stores (2,050 stores, inventory research)



2004 Large-scale redesign (3,110 stores; increase in the number of stores and start of provision of weekly expanded estimates)

2014 Specialty stores fully transitioned to the internet (for inventory research)



Nationwide Retail Store Panel Survey

2020 onward Full-scale launch of SRI+. Significant change in design in response to the increased number of samples and changes in the environment and needs.



Nationwide Consumer Panel Survey

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1964 Launch of the purchase log book survey as a unique consumer panel survey (4,800 samples)



1982 The number of samples increased in the Keihin and Keihan districts (9,856 samples)

1992 A scanning system introduced as a survey method in response to the increased use of JAN codes



2005 Introduction of portable code scanners and launch of the personal eye individual panel surveys (5,000 people)

2010 Launch of SCI-Personal, which replaces household panels with individual panels (20,000 people)



2012 The number of SCI-Personal samples increased to 50,000

2017 Addition of individuals in their 70s to the samples

2024 Change in the method of obtaining SCI renewal data (50,000 people)

Nationwide Consumer Panel Survey



2025 Sample size expanded to 70,000 people

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EPISODE_01

History of SRI+

Challenges encountered in the POS project

SRI+ references retail store sales data featuring data about total sales in Japan estimated based on actual sales data from approx. 6,000 stores nationwide (see P. 19). POS¹ data is collected from stores, including retail chain stores, and linked to a proprietary product master after data cleansing.

In Japan, POSs began to be introduced in around 1980, but the effective use of POS systems required the concurrent establishment of a product identification code system, such as the JAN Code² system established in Japan in the same period. As the sales data and product code system were now available, the necessary infrastructure was in place for the introducing of POS systems. Digitalized sales data from the cash registers of retail stores began to be used in marketing.

Before the introduction of POS systems, we collected data using paper-based inventory audits (inventory research). Our survey staff visited subject stores, checked their inventories in person, and collected and aggregated the

data. This style of research was difficult and took a lot of time.

We launched the POS project in 1980 and considered the possibilities of the business from various angles while continuing our demonstration research.

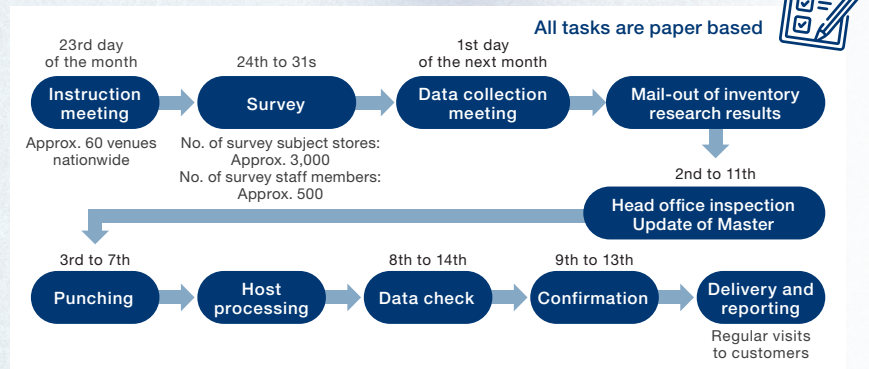
We continued to take on the various challenges we encountered, collaborate with the project team, manufacturers, and retail stores, develop the system and maintain the product master until SRI+ was launched in 1994 as a panel

survey product. To date, we have continued to work to facilitate the continued evolution of SRI+, including increasing the number of stores and changing its design in accordance with the social environment.

¹ POS: Point of sale, referring to the management of information at the point of sale.

² JAN code: Japanese article number codes used in Japan. They are the barcodes attached to each product that is purchased. It is a universal identification code indicating what the product is and which business operator it is from.

Inventory research work flow (around 1990, before the introduction of POS systems)



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History of SCI

From purchase log books to the scanning method

The origin of SCI is a paper-based purchase log book survey of 1,575 households that was conducted in 1961. The method used in the survey was the journal method, in which the names of purchased goods were entered in sequence. We had each household enter the names, prices, places of purchase, and other information about the goods they purchased into a thick notebook, like a household ledger. When survey staff members visited the subject's home to check

and collect data, they consulted the subjects on problems and issues regarding the survey. This style of survey also led to a deepening of our communication with the subjects.

We repeatedly improved this system, including creative measures we implemented to improve the survey form, and later switched to the scanning method of digital data collection. Doing this, we switched from paper-based surveys to a method in which barcodes were scanned

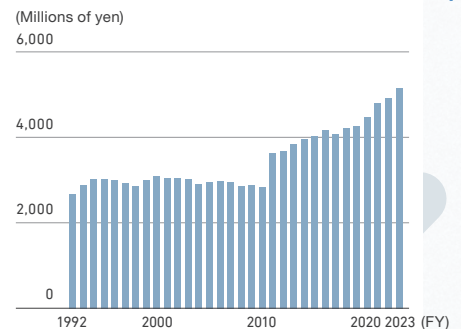
using dedicated devices and then detailed information was entered into the system using a computer.

Survey design is extremely important for ensuring the accuracy and market representativeness of data and enabling users to continually follow trends. To date, we have repeatedly experimented by changing the design of our surveys based on the government's household expenditure surveys, the national census and other aspects of our work and increasing the number of samples.



Upper left: Purchase logbook used for SCI — Upper right: Shopping vouchers used in SCI (as a reward for cooperation in the survey) — Lower left: An SCI scanner — Lower right: A survey staff member visiting a subject

Change in SCI Sales



*Sales data for the period starting in 1992, when we switched from a paper-based survey method to the scanning system

*Data is taken from internal documents and therefore differs slightly from data previously disclosed in consolidated financial results.

*With the change of our fiscal year to July - June in FY2019, sales for FY2019 are the data for April 2019 to March 2020, and sales for FY2020 are the data for July 2020 to June 2021.