

**Television Viewing and Media Use Today:
From “The Japanese and Television 2015” Survey¹**

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¹ This Article based on the authors' article “*Terebisyō to Medhiariyō no Genzai* ~ “*Nihonjin to Terebi 2015*” *Tyōsa kara* ~ [The Present State of TV Viewing and Media Use From the 2015 Public Opinion Survey “The Japanese and Television”], originally published in the August 2015 issue of “*Hoso Kenkyū to Chōsa*” [The NHK Monthly Report on Broadcast Research]. Full text in Japanese may be accessed at:
http://www.nhk.or.jp/bunken/summary/research/report/2015_08/20150802.pdf

Abstract

During February–March 2015, the NHK Broadcasting Culture Research Institute conducted “The Japanese and Television 2015” survey, a nationwide public opinion poll carried out every five years since 1985 to track popular attitudes and behavior toward television. In order to track changes over the long term, previous surveys examined not only television viewing behavior but also public attitudes toward television viewing. To better suit the current media environment, the question items for the 2010 survey were completely reviewed and revised, and the survey method was changed from face-to-face interview to drop-off and pick-up. This seventh survey details the changes that have taken place in the five years since 2010.

The first “Japanese and Television” survey was conducted in 1985. In the 30 years since then, viewers have continued to be satisfied with television, and it remains a familiar media in people’s lives. However, the percentage of those who watch television every day has fallen under 80 percent and people also spend less time viewing television in real time (at time of broadcast). Watching recorded programs or Internet videos, which is commonplace among the younger generation, is now also widespread even among middle-aged and older generations. Positive attitudes toward television are declining among the middle-aged, who also see less need for television overall. Television’s previously unassailable position for its news function and prompt updates of news and information is also being challenged. Viewer behavior and attitudes toward television and other media have clearly changed in the past five years, not just among the young but also among people in their 40s and 50s.

Introduction

Our report examines the results of “The Japanese and Television 2015” survey that was conducted in February and March 2015. Tracking popular attitudes and behavior toward television, this survey is the latest nationwide public opinion poll of the series carried out every five years since 1985. The surveys have detected long-term changes not only in television viewing behavior but also in public attitudes toward television viewing.

The first “The Japanese and Television” survey was conducted to analyze the gradual decline in television viewing that was observed in the mid-1970s, and was also intended to gauge popular attitudes.² Although viewing time increased again in the latter half of the 1980s, the television and media environment and research agenda have changed over the years with the spread of videos, video games, satellite broadcasting, cable television, and a greatly expanded number of channels available for viewing, as well as the growth in the number of Internet users and the appearance of a host of diverse services.

Survey question items have been revised as needed over the years but were completely reviewed and revised for the 2010 survey. The survey method was also changed from face-to-face interview to drop-off and pick-up, a method that yields responses with a fairly

² “Nihonjin to terebi” [The Japanese and Television 1985], *Hoso kenkyu to chosa*, August 2010 issue.

high validity rate. But in order to conduct a time series analysis, in 2010 a parallel survey was conducted using the previous face-to-face interview method, and we analyzed the results of the two studies.³

The television and media environment has continued to evolve over the past five years with the spread of digital recording devices and smartphones and the start of a service allowing viewers to catch up on television programs they missed earlier. To reflect these changes, questions on viewing of videos and attitudes toward information were added to the 2015 survey. This is the second survey employing the drop-off and pick-up method, and in this report we will examine mainly the changes that have taken place since the previous survey in 2010. While it is not possible to make direct comparisons, we will also analyze changes in trends of responses to related questions posed in the surveys from 1985 to 2010 when the face-to-face interview -face interview method was used.

Survey Outline

“The Japanese and Television 2015” survey was conducted from Friday, February 27 to Sunday, March 8, 2015, sampling 3,600 Japanese aged 16 and over. The drop-off and pick-up survey method was used and responses were received from 2,442 people (for details, see p. 35). The two main subjects of the survey were television viewing behavior and attitudes and media usage behavior and attitudes. Other question items for background information were demographics, attitudes toward daily life, and views on information. Sample composition is described in Figure 1.

Figure 1. Sample Composition

	Overall	Gender		Men						Women					
		Men	Women	16-29 yrs. old	30s	40s	50s	60s	70 and over	16-29 yrs. old	30s	40s	50s	60s	70 and over
2010 Year	2,710 persons	1,280	1,430	214	236	213	192	236	189	218	222	232	234	279	245
	100.0%	47.2	52.8	7.9	8.7	7.9	7.1	8.7	7.0	8.0	8.2	8.6	8.6	10.3	9.0
2015 Year	2,442 persons	1,154	1,288	151	139	223	187	224	230	171	160	250	235	226	246
	100.0%	47.3	52.7	6.2	5.7	9.1	7.7	9.2	9.4	7.0	6.6	10.2	9.6	9.3	10.1

³ “Terebi shicho to media riyo no genzai (1): ‘Nihonjin to Terebi 2010’ chosa kara” [Television Viewing and Media Use Today (1): From “The Japanese and Television 2010” Survey], *Hoso kenkyu to chosa*, August 2010 issue. “Terebi shicho to media riyo no genzai (2): ‘Nihonjin to Terebi 2010’ chosa kara” [Television Viewing and Media Use Today (2): From “The Japanese and Television 2010” Survey], *Hoso kenkyu to chosa*, October 2010 issue.

1. Changes in Television-Viewing Behavior

(1) Television Viewing

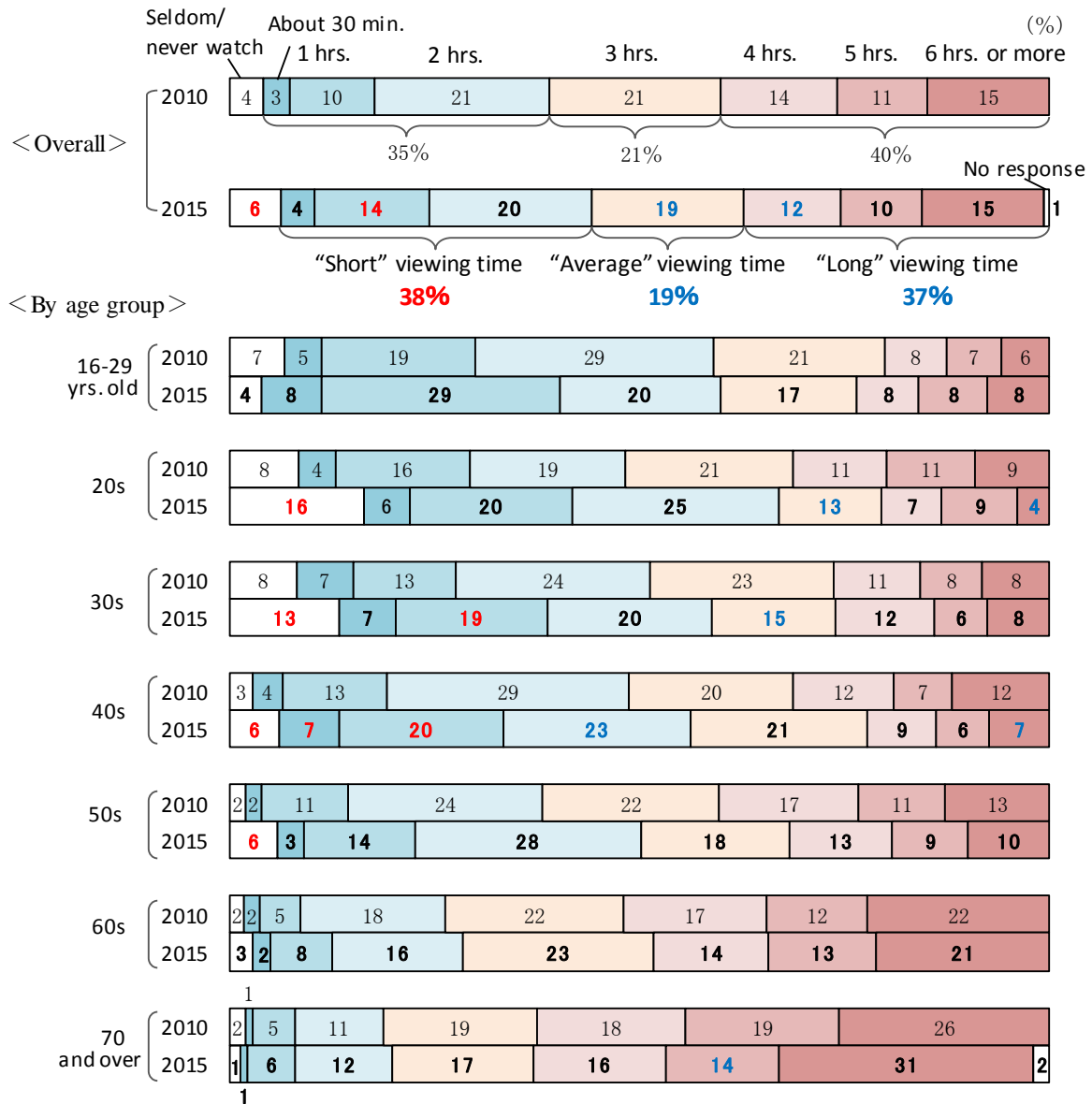
Shorter TV-viewing time

When asked how many hours of television (not including material recorded on video or DVD)⁴ they watch on ordinary weekdays, around 20 percent of participants responded “2 hours” or “3 hours” (Figure 2). Grouping hours of television viewing into “short” (30 minutes to 2 hours), “average” (3 hours), and “long” (4 hours or more) categories, slightly under 40 percent each are in the “short” and the “long” viewing categories. Over the past five years, the proportion of responses concerning time spent viewing television has changed as follows: “seldom or never watch” (up from 4 to 6 percent) and view for a “short” time (up from 35 to 38 percent) have increased, while “average” (from 21 to 19 percent) and “long” (from 40 to 37 percent) television viewing hours have decreased.

By age, more people in their 20s to 50s report that they “seldom or never watch” television: for “long” viewing time of 4 hours or more, smaller proportions of those in their 20s (from 31 to 21 percent), their 40s (from 31 to 22 percent), and their 50s (40 to 32 percent) are viewing television for a long time. Among people in their 40s and under, about half report “short” viewing time of about 30 minutes to less than 2 hours. On the other hand, there has been no change in television viewing time among people in their 60s and over in the past five years, indicating that the older generation make up the majority of those spending a long time watching television.

⁴ The survey questions about television viewing time—length of time spent watching television and respondents’ use of different forms of media—excluded videos, DVDs and other recorded programs. For other questions in the survey, no restrictions were placed on whether respondents watched television programs in real time or recorded material.

**Figure 2. Number of Hours Spent Watching TV on a Weekday
(Overall, by Age Group)**

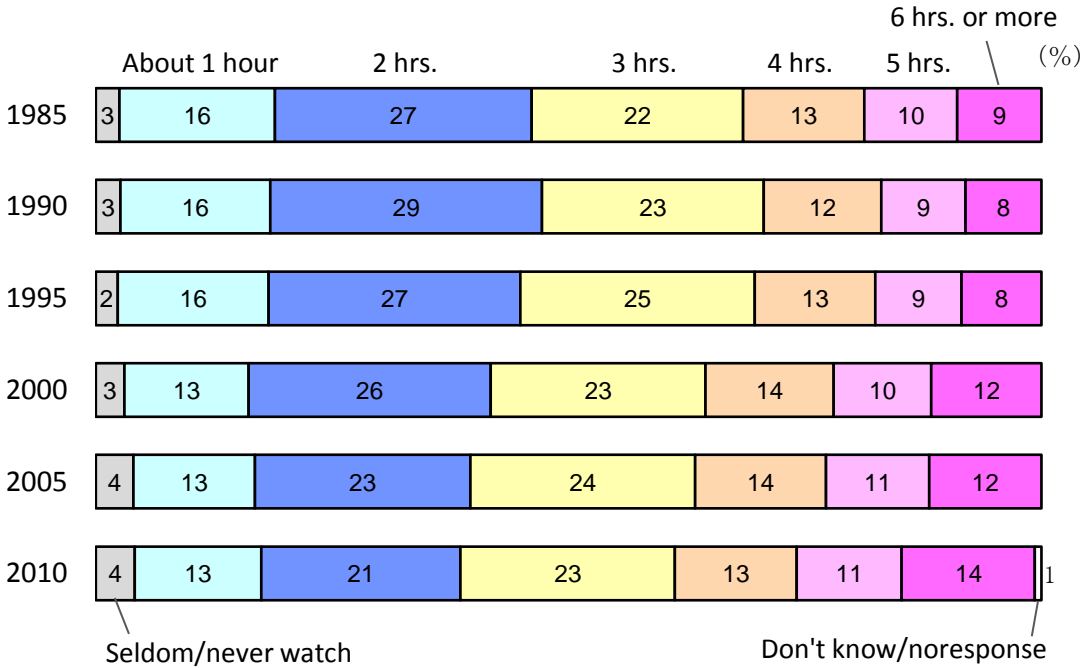


Red figures: Statistically higher compared to 2010.
Blue figures: Statistically lower compared to 2010.
(Same below.)

Examining changes in television viewing time since 1985 when the survey was conducted through face-to-face interviews, between 1995 and 2010 viewing time of less than 2 hours decreased, whereas viewing time of 4 hours or more increased. Overall television viewing time increased over this period (Figure 3). The reasons for this were probably the increase in television viewing time among people of the older generation and the general aging of the population. For example, more people 70 and over were watching television for a “long” time (increasing from 49 percent in 1985 to 61 percent in 2010) and the proportion of people in

their 60s in the sample increased markedly (up from 18 percent in 1985 to 40 percent in 2010). In the 2015 survey, the older generation continue to have long television viewing hours, but overall viewing hours have become shorter on average due to the large drop in the number of hours spent watching television among people in a wide range of age groups from their 20s to their 50s. More of these people report “seldom” or “never” watching television.

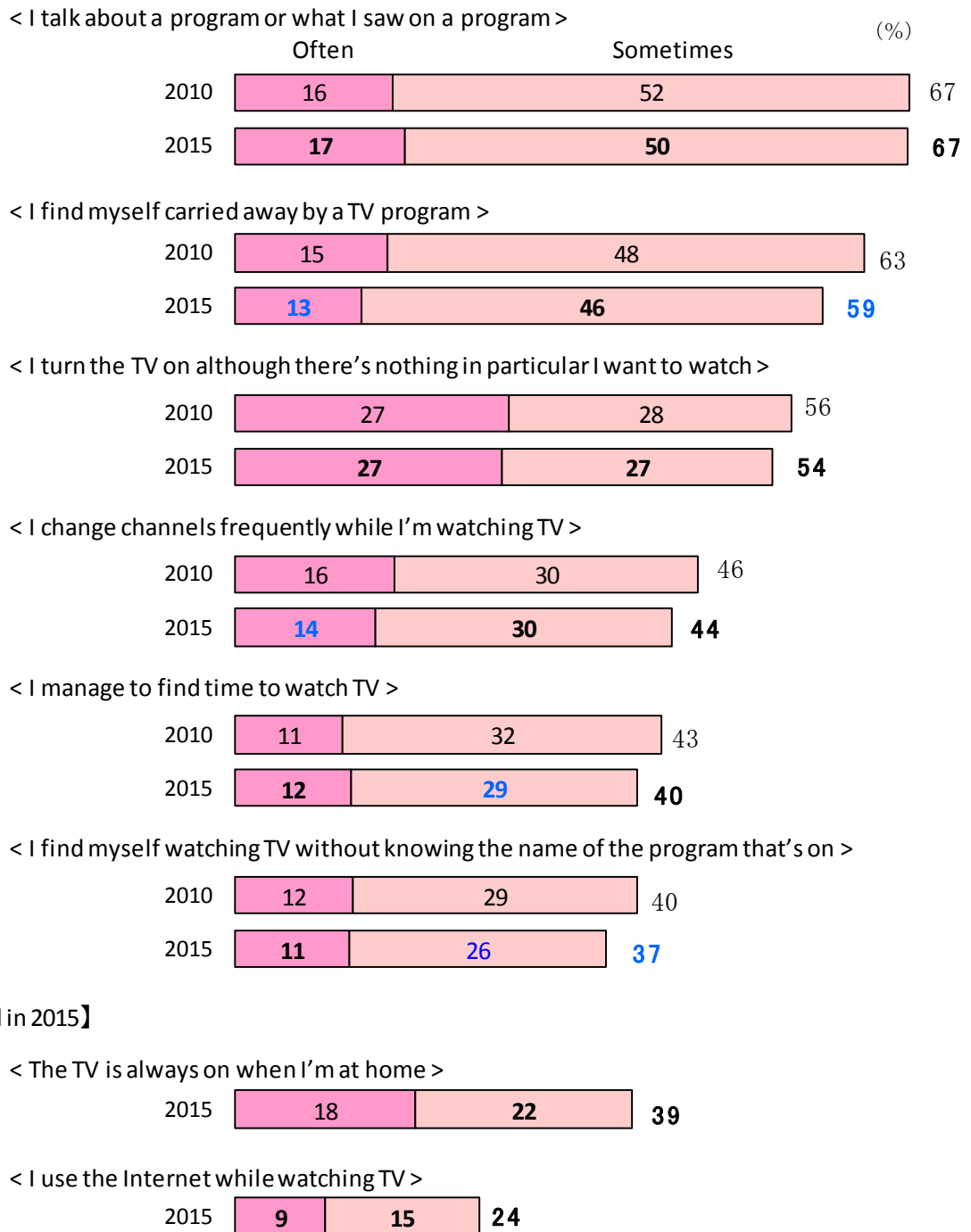
**Figure 3. Number of Hours Spent Watching TV on a Weekday
(Data Obtained through Face to Face Interviews)**



Fewer men in their 30s and 40s report finding themselves “carried away by TV”

Respondents were asked about various aspects of their television viewing habits (Figure 4). When asked about the eight items shown in Figure 4, 67 percent, the largest proportion, said they often or sometimes “talk about a program or what I saw on a program.” By gender and age, over 70 percent of women in their 60s and under say they did so, indicating that television is an aid to communication. Around 60 percent of people report often or sometimes “being carried away by a TV program,” but this proportion has dropped over the past five years (from 63 to 59 percent). By gender and age, the proportion of men saying so has dropped, from 68 to 59 percent among men in their 40s and from 65 to 48 percent among men in their 30s. Fewer men in their 30s also said “I talk about a program or what I saw on a program” (from 63 to 51 percent) and “I manage to find time to watch TV” (from 37 to 25 percent), from which we may infer a loss of interest in television in this age group.

Figure 4. TV Viewing Habits

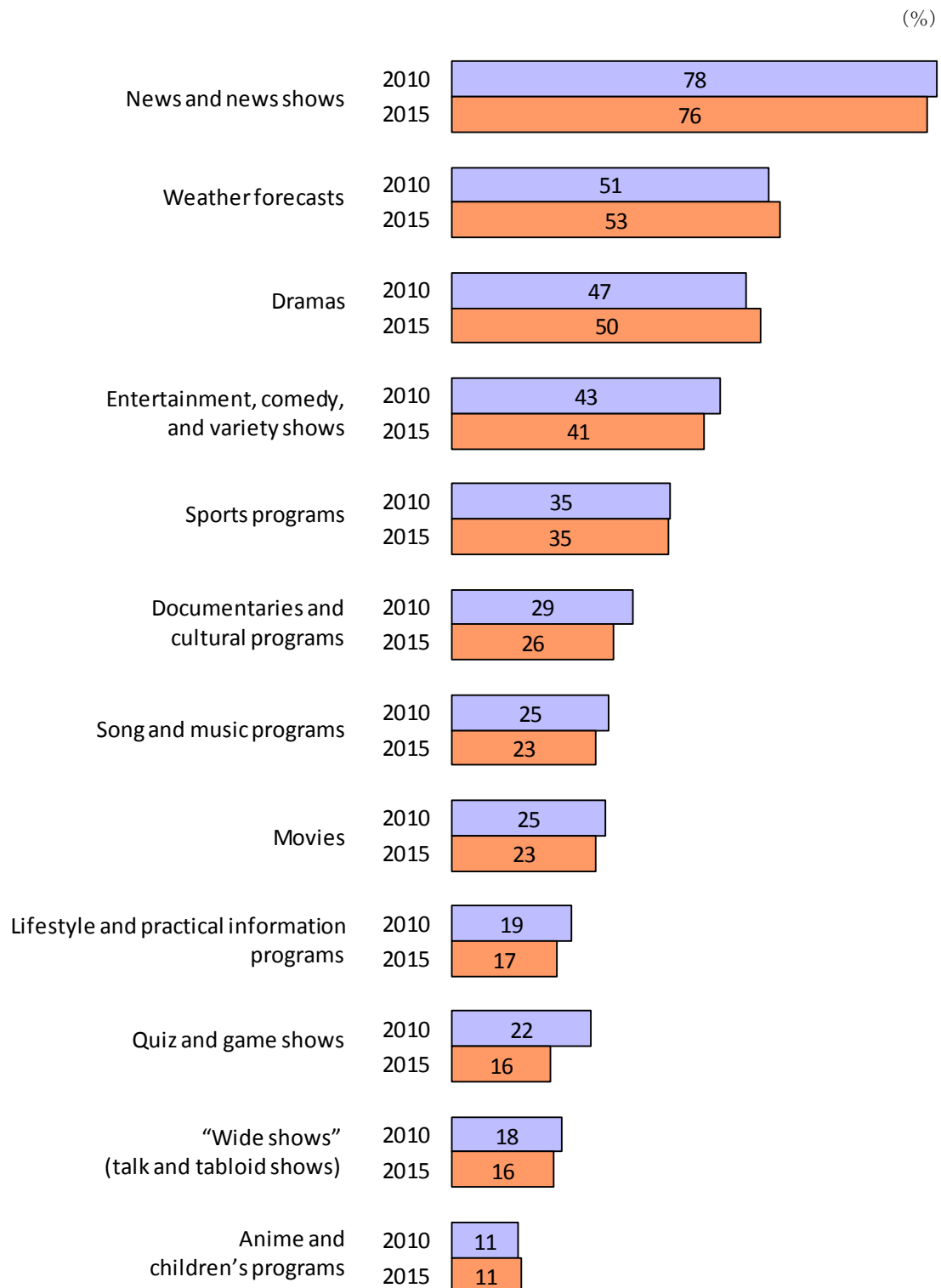


Frequently watched genres are “documentaries and cultural programs”; fewer watch “lifestyle and practical information programs” and “quiz and game shows”

Respondents were asked to select the type or types of programs that they watch most frequently from a list of 12 items, choosing as many as they liked. The three top-ranking categories were “news and news shows” (76 percent), “weather forecasts” (53 percent), and “dramas” (50 percent) in that order (Figure 5). This ranking has remained unchanged since 2010.

When analyzing the results of most-viewed programs, we must keep in mind the television programming at the time of the survey, but with regard to changes between 2010 and 2015, smaller proportions of people are choosing “documentaries and cultural programs” (from 29 to 26 percent), “lifestyle and practical information programs” (from 19 to 17 percent) and “quiz and game shows” (from 22 to 16 percent). Conversely, there were no increases in viewership for any types of programs. By gender and age, compared to 2010 fewer men aged 16 to 29 and women in their 40s to their 60s were watching “documentaries and cultural programs,” fewer women aged 16 to 29 and women in their 40s were viewing “lifestyle and practical information programs,” and fewer women in their 60s and under chose to watch “quiz and game shows.” This decline in the proportion of female viewers in a wide spectrum of age groups has contributed to a decline in viewership across the board. Fewer men and women aged 16 to 29 are watching “entertainment, comedy, and variety shows,” and by age group the proportion of those aged 29 and under watching this type of program has dropped (from 71 to 56 percent), indicating that the young generation are not viewing entertainment programs on television as much as before.

Figure 5. Most Frequently Watched Programs (Multiple Answers)



(2) Attitudes toward Television

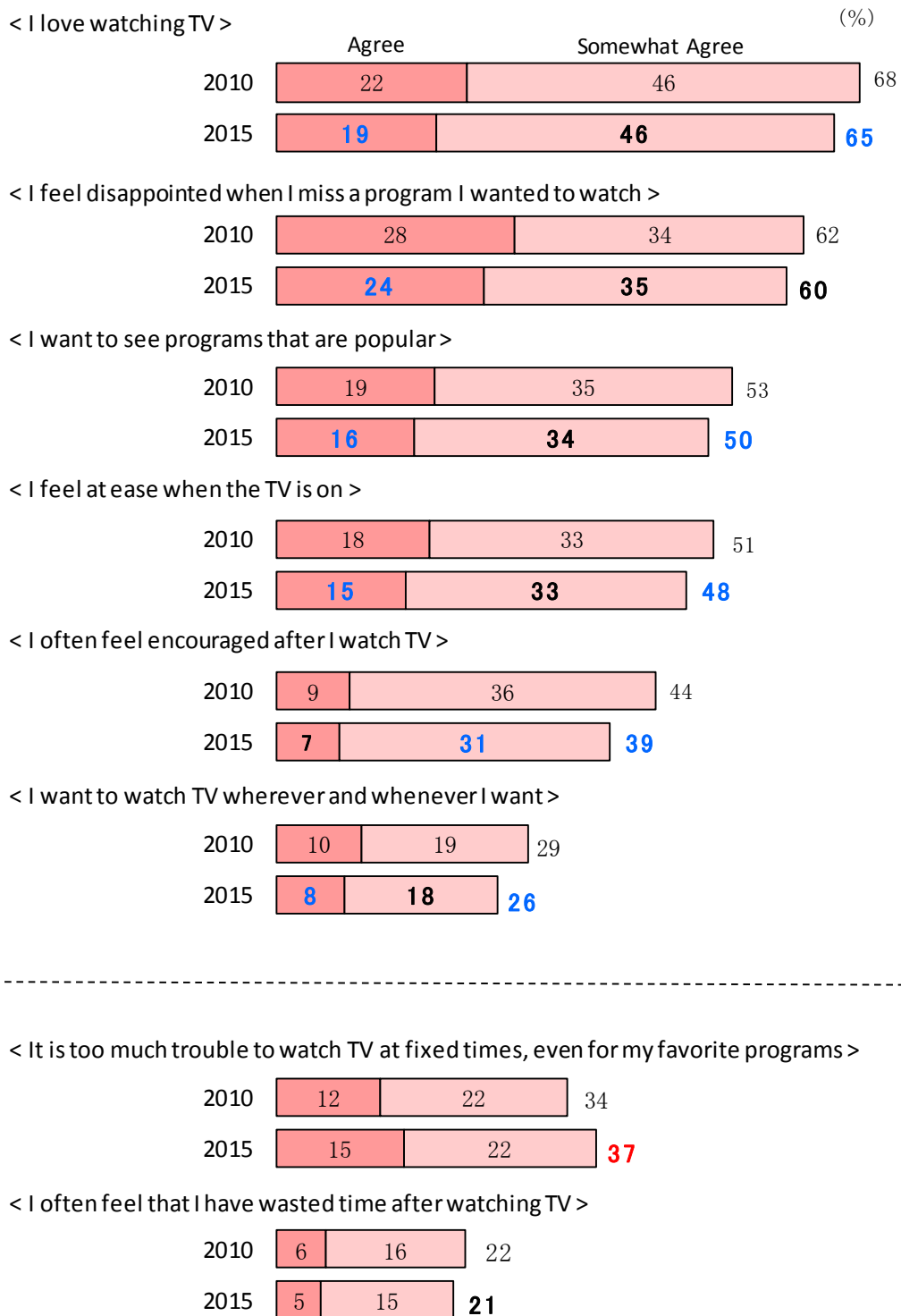
Fewer have positive views of television

This section will look at viewers' attitudes toward television. The survey questionnaire asked respondents about their attitudes toward television using eight statements (Figure 6). The statement with which the largest proportion of people "agree" or "somewhat agree with" is "I love watching TV" (65 percent), followed by "I feel disappointed when I miss a program I wanted to watch" (60 percent). But compared to 2010, except for "I feel disappointed when I miss a program I wanted to watch," the proportion of positive responses concerning all other statements declined. By gender and age, positive responses to the following statements declined among the groups mentioned as follows: "I love watching TV" dropped among men aged 16 to 29 (from 73 to 60 percent); "I feel disappointed when I miss a program I wanted to watch" dropped among men aged 16 to 29 (from 66 to 56 percent) and among men in their 40s (from 69 to 56 percent); "I want to see programs that are popular" declined among men in their 40s (from 47 to 38 percent); and "I want to watch TV wherever and whenever I want" was down among men aged 16 to 29 (from 38 to 25 percent), men in their 40s (from 37 to 26 percent) and women aged 70 and over (from 34 to 24 percent). Men aged 16 to 29 and in their 40s had less positive opinions about television for many of the items surveyed than five years ago.

On the other hand, the proportion of those who felt that "It is too much trouble to watch TV at fixed times, even for my favorite programs" increased compared to five years ago (from 34 to 37 percent) and more people from their 30s to their 50s held this opinion. From this we may infer that middle-aged people dislike being tied down to specific broadcast times and tend to place more importance on managing their time.

Figure 6. Attitudes toward TV

【 Positive 】

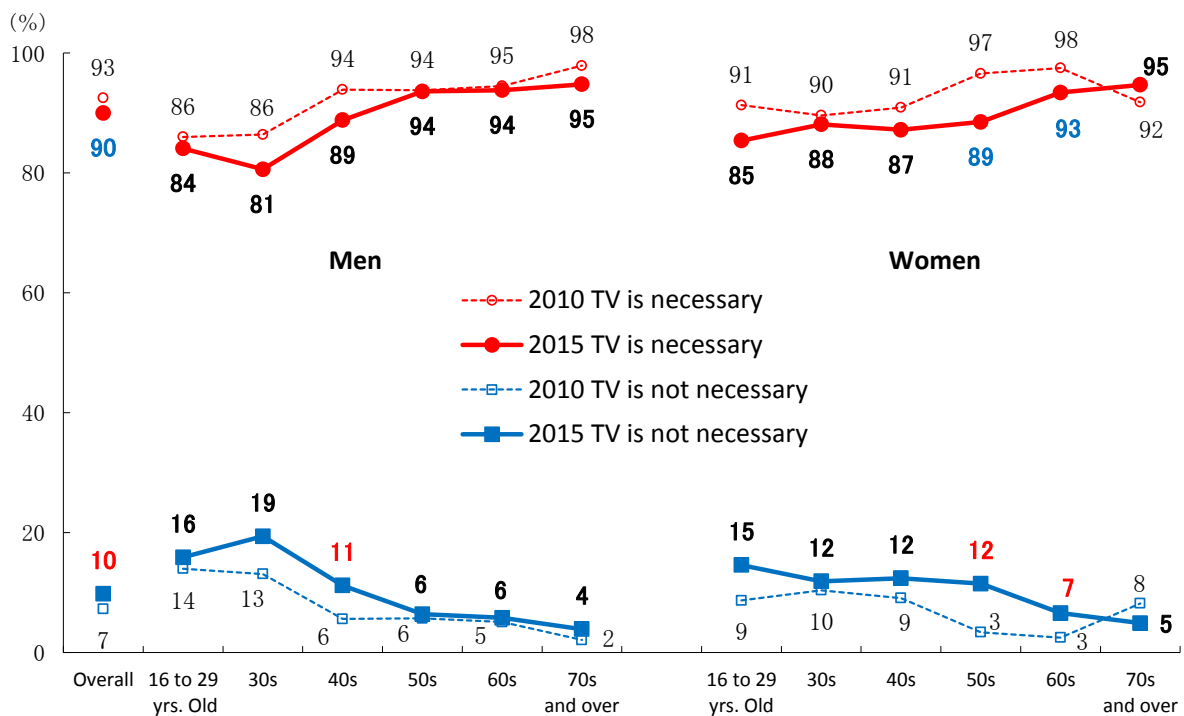


Fewer believe that television is a “necessity”

Regarding people’s satisfaction with television, 73 percent indicate that they are “(very and fairly) satisfied,” a figure unchanged compared to five years ago (74 percent). But in terms of overall evaluation of television, when respondents are asked about the necessity of television, the vast majority believe that television is “necessary (including more or less necessary),” although this proportion has dropped from 93 to 90 percent in the past five years, whereas the proportion saying that television is “not necessary (including more or less unnecessary)” has risen from 7 to 10 percent (Figure 7). By gender and age, those who consider television “necessary” far outnumber those who believe the contrary in all groups, but compared to 2010 more men in their 40s and women in their 50s and 60s think that television is “not necessary.”

Summarizing what we have learned from survey results so far, compared to five years ago television viewing in real time (at time of broadcast) has declined wide range of groups, this is the first time that television viewing time is shorter than before. From this we may infer that the decline even among middle-aged people of those who believe that television is “necessary” are partly responsible for the drop in positive opinions toward television.

Figure 7. Necessity of TV (Includes More or Less Necessary) (By Gender and Age)



2. Television in the Media Environment

Media equipment and services change with advancement in technology and according to people's needs. In this section we examine how television is positioned in the media environment of 2015, and how the public's usage patterns and attitudes toward media have changed.

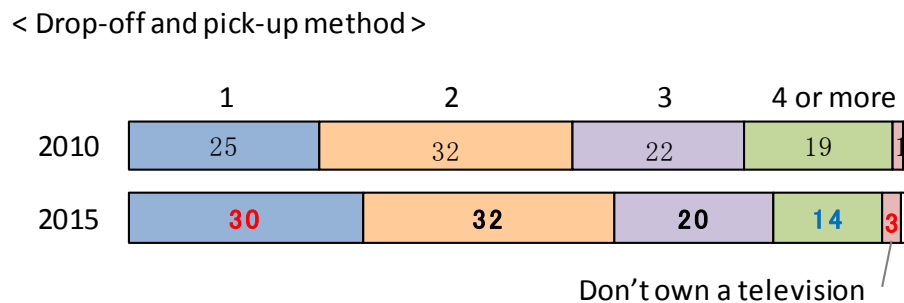
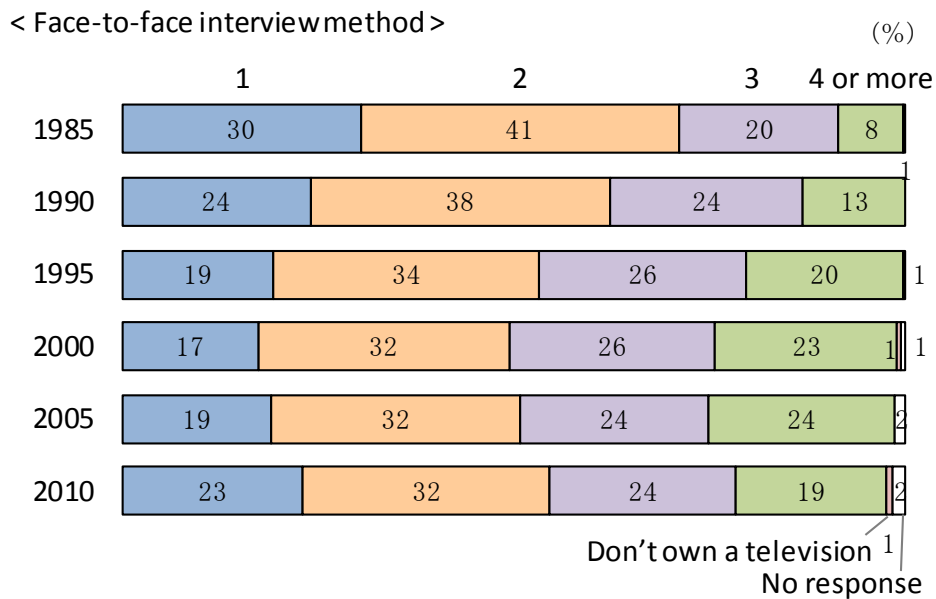
(1) Media Environment

More households now own just one TV

Asked about the number of televisions in their household (Figure 8), about 30 percent of people answered "1" (30 percent) or "2" (32 percent). Figure 8 shows that between 1985 and 2000, the proportion of those who responded "1" and "2" decreased while the proportion who responded "3" and "4 or more" increased. Between 2005 and 2010, the proportion of those responding "1" increased and those responding "4 or more" decreased. This was also the case between 2010 and 2015, the proportion of those responding "1" increasing (from 25 to 30 percent) and those responding "4 or more" decreasing (from 19 to 14 percent), while the proportion of those saying they "don't own a television" rose (from 1 to 3 percent). By household composition, the proportion of two-generation (children plus parents) households owning one television increased (from 23 to 30 percent), and that of single-person households saying they "don't own a television" rose to 10 percent.

The rise between 1985 and 2000 in the number of people saying they owned "3" or "4 or more" televisions in their household can likely be explained by the increase in the proportion saying "I want to watch TV alone" over this time, from 32 percent in 1985 to 37 percent in 2000 and 39 percent in 2005. Meanwhile, we can infer that the increase in the number of those answering "1" is probably due to the purchase of new televisions after the shift to digital broadcasting in 2011 and the decline in the number of televisions "for personal use" that will be gone into below, among other reasons.

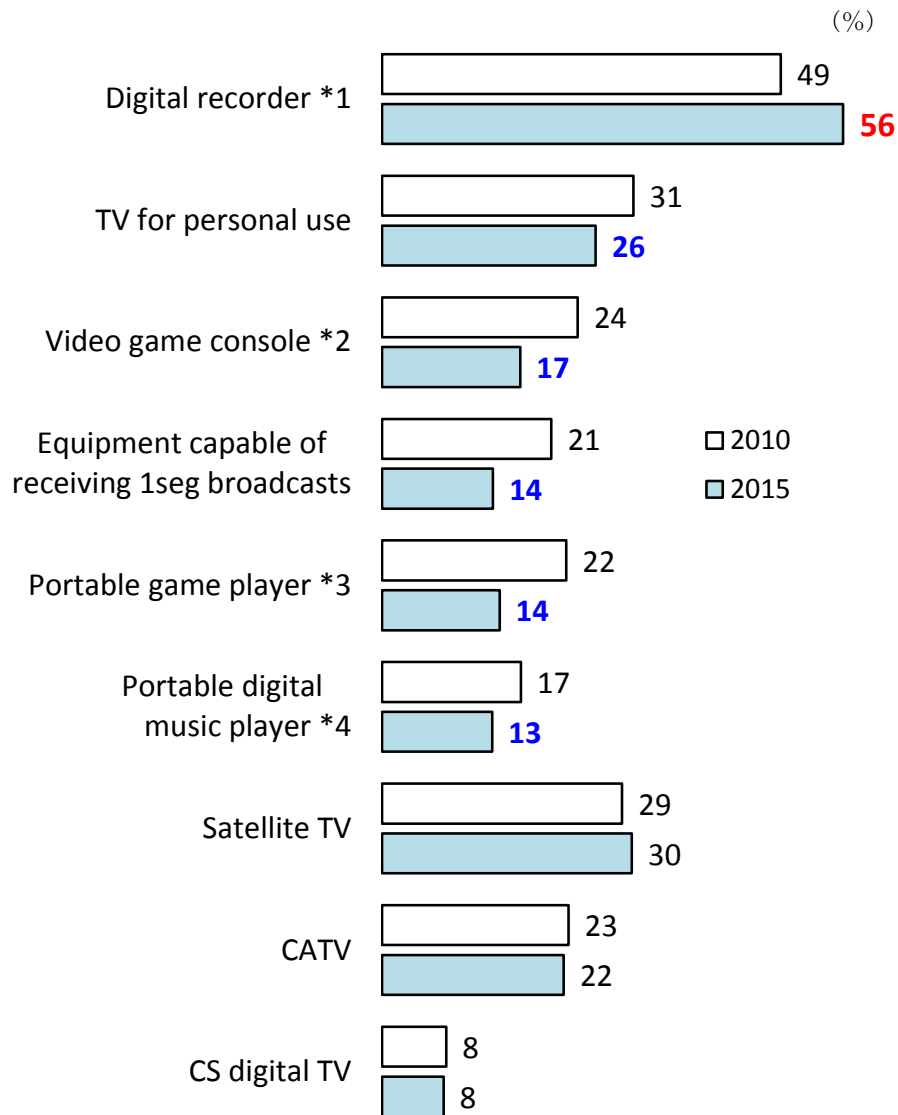
Figure 8 Number of TVs



Media equipment and services: Expansion and contraction

Respondents were asked to choose from a list (Figure 9) to describe their use of media equipment and services (multiple answers allowed). Compared to 2010, people’s use of “digital recorders” increased (from 49 to 56 percent), but decreased in several other categories: “television for personal use” (from 31 to 26 percent); “video game console” (from 24 to 17 percent); “equipment for viewing 1seg broadcasting” (from 21 to 14 percent), and so forth. There were no changes in the use of “satellite broadcasting,” “CATV” or “CS digital TV” over the past five years. For new categories added in 2015, 54 percent used a “personal computer,” 46 percent used a “smartphone,” and 17 percent used a “tablet” (Figure 10).

Figure 9. Media Equipment and Services Used (Multiple Answers)



*1 DVD, Blu-Ray, hard-disk drive or other

*2 Wii, PlayStation 3 or other

*3 PSP (PlayStation Portable), Nintendo DS or other

*4 iPod or other

**Figure 10. Media Equipment and Services Used
(Multiple Answers, by Gender and Age)**

(%)

	Overall	Men						Women					
		16-29 yrs old	30s	40s	50s	60s	70s and over	16-29 yrs old	30s	40s	50s	60s	70s and over
Digital video recorder	49	61	68	70	53	37	20	64	64	61	53	23	14
	56	60	65	73	68	50	32	73	75	71	66	41	18
Television for personal use	31	39	35	24	33	33	37	26	17	22	27	31	44
	26	33	19	19	27	37	34	21	12	12	24	29	39
Portable game player	22	58	41	24	13	5	2	45	37	32	11	5	1
	14	46	33	23	10	2	1	25	30	18	6	3	1
Portable digital music player	17	44	23	20	15	6	5	45	20	17	9	4	1
	13	34	14	18	11	7	4	39	16	13	12	6	2

(Upper figures: 2010; lower figures: 2015)

< Items added in 2015 >

Personal computer	54	66	71	79	70	55	30	64	71	65	59	30	12
Smartphone	46	87	79	72	43	19	4	84	84	64	42	15	4
Mobile phone or PHS (other than smartphone)	39	8	21	34	49	55	50	12	21	36	50	59	40
Tablet (iPad, etc.)	17	29	21	28	21	13	5	16	33	22	19	10	2

* Shaded areas show statistically higher proportions compared to overall (same below).

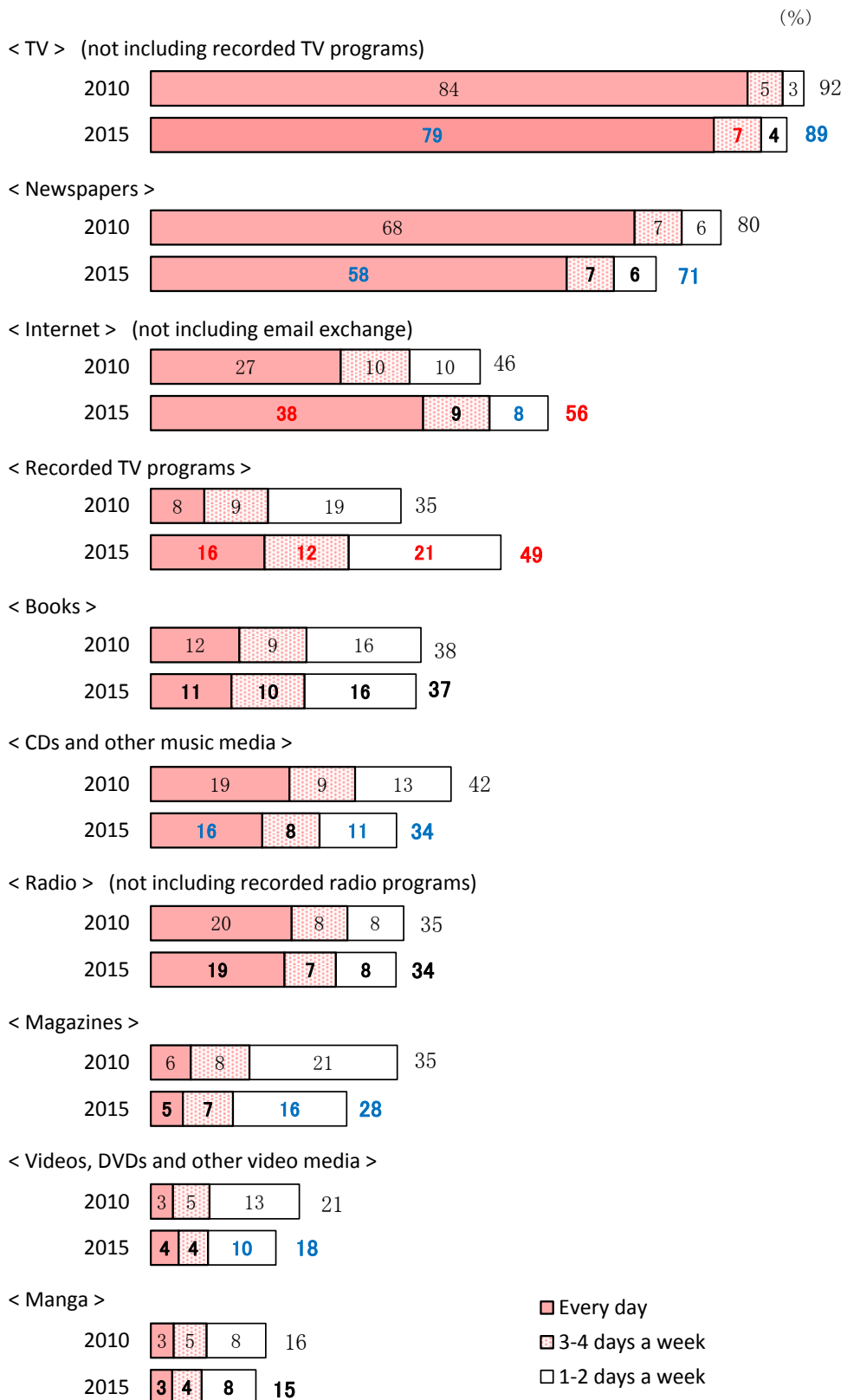
By gender, over 60 percent of men and women in their 50s and under used a digital video recorder; since 2010 more men aged in their 50s and over and more women in their 30s to 60s have also been using this device. Over 30 percent of men aged 16 to 29 and in their 60s and over, and women aged 70 and over use a “television for personal use,” a high proportion compared to the overall sample, but less than 20 percent of men and women in their 30s and 40s do so. About 80 percent, the great majority, of men and women in their 30s and under use “smartphones,” whereas about 50 to 60 percent of men in their 50s and over and women in their 50s and 60s use a “mobile phone or PHS (other than smartphone),” indicating that the main user groups for these devices are different.

Use of “portable game players” and “portable digital music players” has declined in the past five years, especially among the younger generation who have been heavy users of these types of media so far. Given that about 80 percent of the younger generation use smartphones, which can also be used to play games and listen to music, we can infer that they have replaced game players and music players for these functions.

(2) Frequency of Media Access

Respondents were asked about the frequency of their access to ten forms of media, including television, newspapers, and the Internet. They were asked to indicate whether they did so “every day,” “3-4 days a week,” “1-2 days a week,” “1 or 2 days a month,” or “seldom/never” (Figure 11).

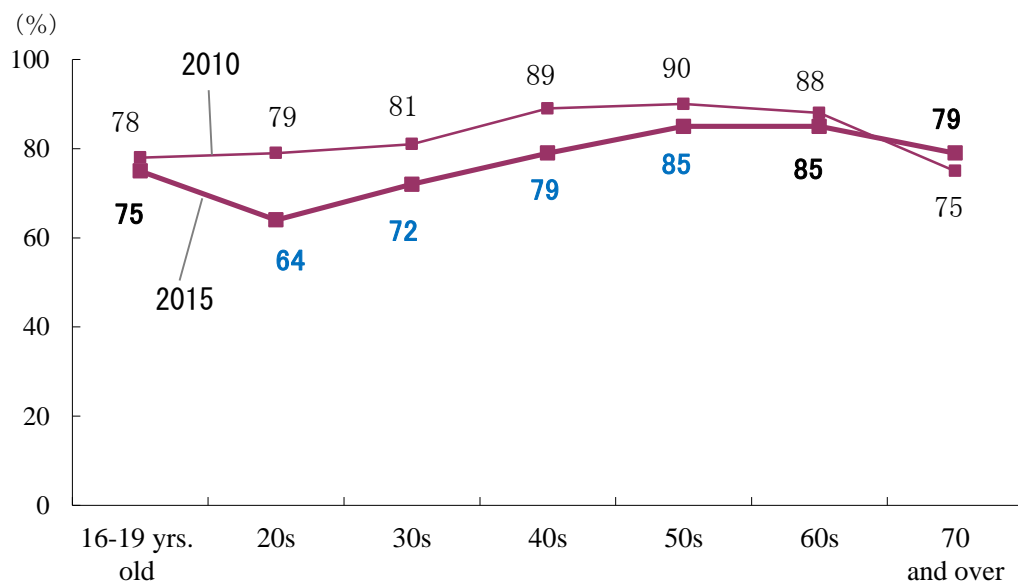
Figure 11. Frequency of Access to Media



Less daily television watching and newspaper reading

A total of 89 percent of people said they watched television (not including recorded TV programs) “every day,” “3-4 days a week,” and “1-2 days a week,” the largest proportion for any medium, and 79 percent of these people said they watched “every day.” But over the past five years, the proportion of those watching “every day” decreased from 84 to 79 percent, as did the proportion of those watching “1 day or more a week” (from 92 to 89 percent). Figure 12 shows the proportion of those watching television “every day” by age. Daily television viewing has dropped among those aged from their 20s to their 50s in the past five years, and especially so among those in their 20s, to 64 percent, meaning that only two out of three people in this age group watch television every day.

Figure 12. Daily Access to TV (by Age Group)

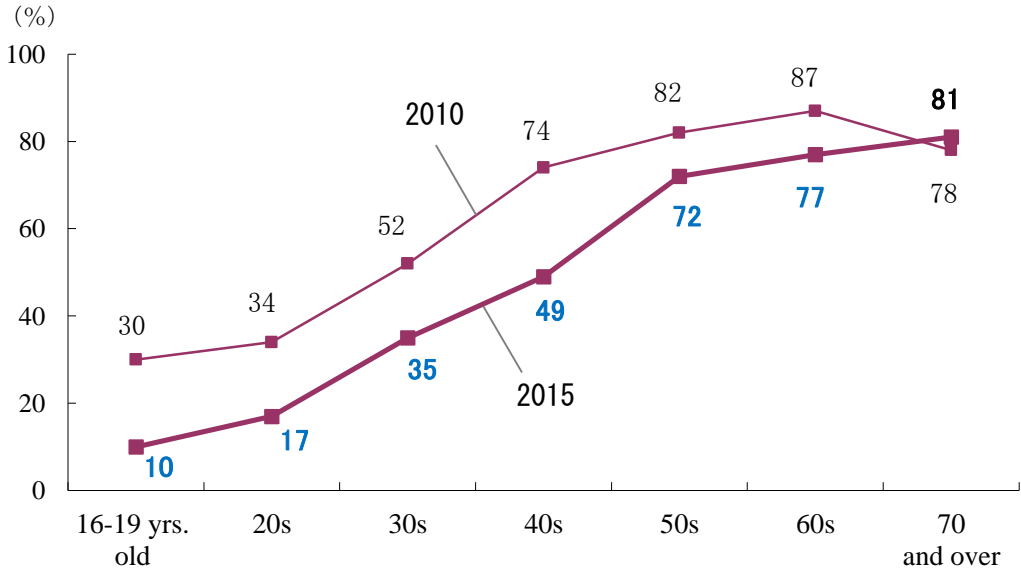


Even when the survey was conducted through face-to-face interviews, daily television viewing had been dropping slightly since 2005 (from 95 percent in 2000 to 93 percent in 2005 and 92 percent in 2010), but the decline since 2010 appears to have accelerated.

Where access to newspapers is concerned, this medium has the next-highest access after television: 58 percent of people read a newspaper “every day” and 71 percent read one “1 day a week or more.” But over the past five years, the proportion of those reading a newspaper “every day” has dropped (from 68 to 58 percent), as has the proportion of those doing so “once a week or more” (from 80 to 71 percent).” Looking at access to newspapers “every day” by age (Figure 13), the proportion is over 70 percent among those in their 50s and over,

higher than for the overall sample, but falls under 50 percent for those in their 40s and under. Access to newspapers is only 10 percent among 16 to 19 year-olds. This indicates a large discrepancy in access based on age. In the past five years, access to newspapers every day has dropped in every age group 69 and under and the discrepancy has grown even wider.

Figure 13. Daily Access to Newspaper (by Age Group)

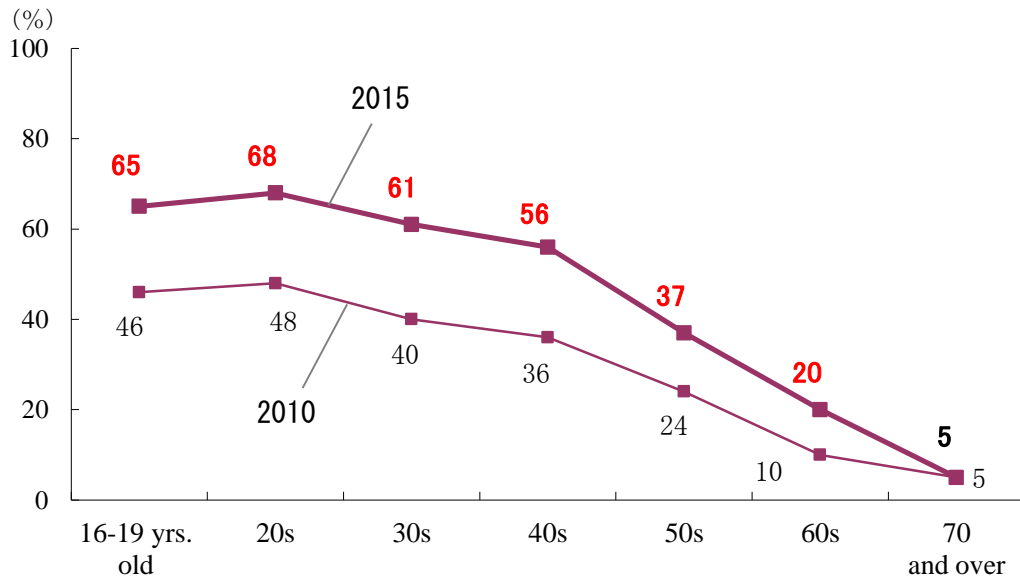


Other than television and newspapers, media for which access “once a week or more” has dropped in the past five years include CDs and other music media, magazines, and videos/DVDs and other video media. The proportion of those accessing books, radio, and manga “once a week or more” has remained unchanged over the past five years.

More frequent access to the Internet and recorded TV programs

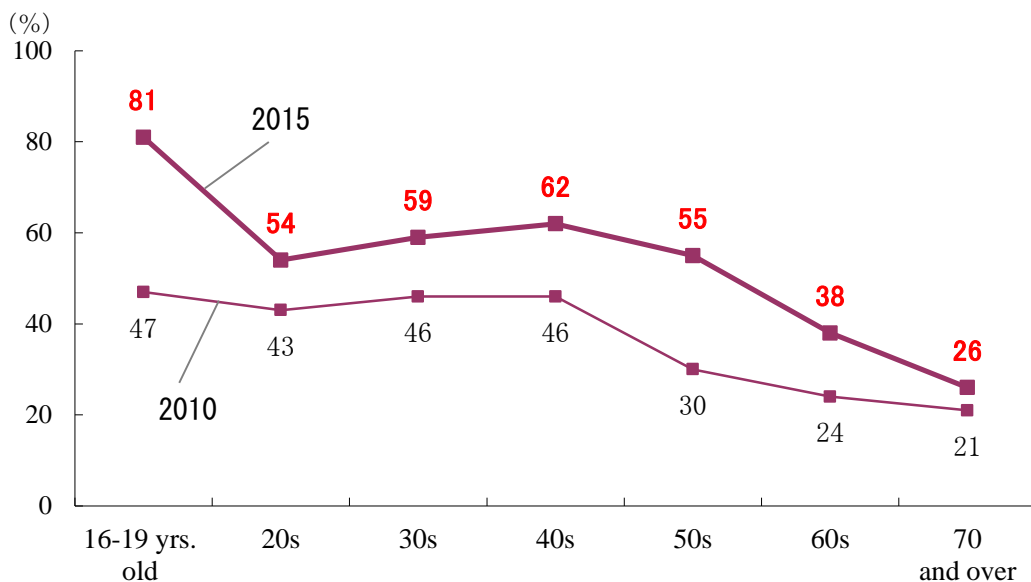
Meanwhile, the proportion of those reporting access to the Internet (not including email exchange) “every day” has grown markedly in the past five years (from 27 to 38 percent), and over half (56 percent) access the Internet “once a week or more.” Looking at the proportion who access the Internet “every day,” by age (Figure 14), we see that access has increased in the past five years for those in their 60s and under and exceeds 50 percent among those in their 40s and under. The discrepancy between age groups has grown wider, the reverse of the situation with newspapers.

Figure 14. Daily Access to Internet (by Age Group)



Regarding recorded television programs, 16 percent of respondents access this medium “every day,” as do a relatively large proportion of 21 percent “1 or 2 days a week.” In the past five years, access “every day” has doubled from 8 to 16 percent, and has grown to nearly half the sample (from 35 to 49 percent) for those who watch “once a week or more.” Looking at access “once a week or more” by age (Figure 15), we see that this is the case for over half of people in their 50s and under; notably, 81 percent of those aged 16-19, a much larger proportion than other age groups. The proportion has grown in all age groups in the past five years.

Figure 15. Access to Recorded TV Programs “Once a Week” (by Age Group)



(3) Online Video-Viewing

Eight of every ten men in their 40s and under and women in their 30s and under view videos online

Internet usage “every day” has grown strongly in the past five years, and respondents were asked about online video-viewing. Thirty-five percent watch online videos “once a week or more” (combined total of “almost every day,” “3 or 4 days a week,” and “1 or 2 days a week”), and together with those who watch “1 or 2 days a month” and “a few days a year,” 50 percent of people watched online videos (Figure 16). But those who watch online videos “almost every day” account for only about 10 percent of the total, not a very large figure. Over the past five years, the proportion of online video viewing has grown as follows: “once a week or more,” from 20 to 35 percent, and the “online video viewer” category (those who view online videos at least a few days a year) from 34 to 50 percent. By age and gender, the “online video viewer” has expanded to include men and women in their 60s and under in the past five years, indicating that online videos appeal to a broad range of ages. About 80 percent of men in their 40s and under and women in their 30s and under are “online video viewers” (Figure 17).

Figure 16. Frequency of Online Video Viewing

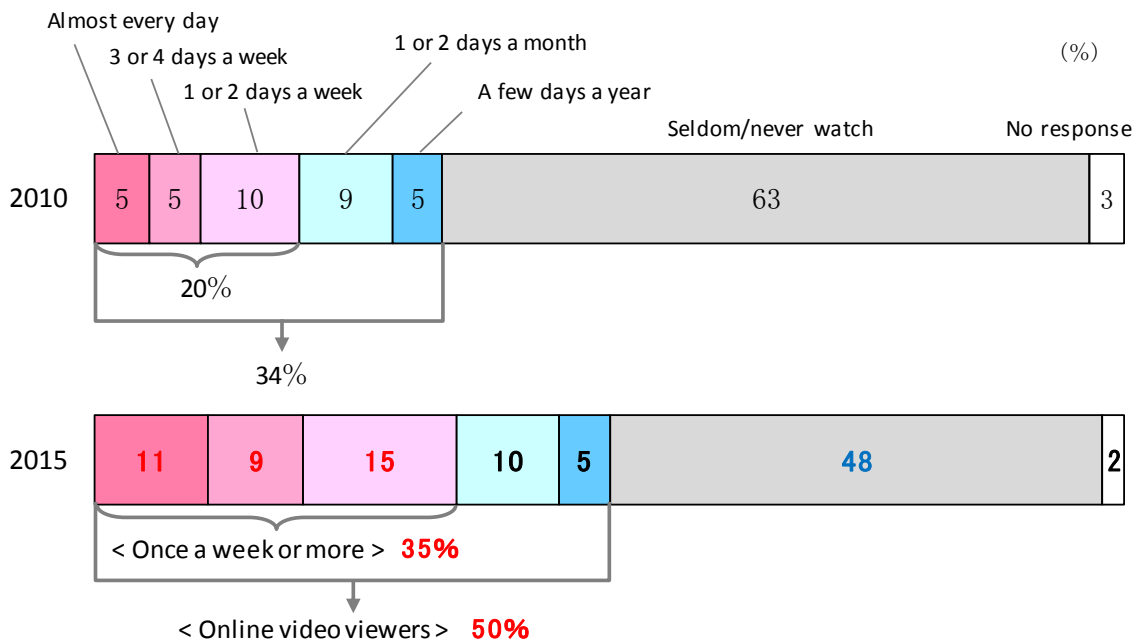


Figure 17. Online Video Viewers

(Who View Online Videos at Least A Few Days A Year), by Gender and Age

(%)

Overall	Men						Women					
	16-29 yrs old	30s	40s	50s	60s	70s and over	16-29 yrs old	30s	40s	50s	60s	70s and over
34	69	58	47	37	19	13	65	41	35	19	7	6
50	89	83	80	60	36	11	84	78	59	46	18	5

(Upper figures: 2010; lower figures: 2015)

Over half of younger people feel that “Online videos are more interesting than TV”

Overall, 32 percent of people (and 64 percent of online video viewers) watch television programs online in frequency ranging from “almost every day” to “at least a few days a year.” By gender and age, over half of men and women aged 16 to 29 and men in their 30s watch TV programs online.

Respondents were also asked about five items pertaining to online video viewing (Figure 18). As the number of online video viewers grows, 27 percent of people overall (combined total for “often” and “sometimes”) feel that “online videos are more interesting than TV,” a figure higher than five years ago. This is especially so among the younger generation, where over half (66 percent of 16 to 19 year-olds and 54 percent of those in their 20s) feel this way. Those who say “I watch online videos rather than TV during my free time” account for 17 percent overall but 46 percent among 16 to 19 year-olds and 47 percent among those in their 20s; thus, about half of those aged 29 and under engage in this activity.

From this it can be inferred that the spread of and increasingly commonplace viewing of recorded TV programs and Internet use are bringing about major changes in the public’s use of and attitudes toward media.

Figure 18. Online Video-Viewing Habits
(Combined Total for “Often” and “Sometimes”) (by Age Group)

(%)

	Overall	16-19 yrs. old	20s	30s	40s	50s	60s	70s and over
Online videos are more interesting than TV	19	48	44	31	21	13	4	1
	27	66	54	45	35	26	9	3
I use the Internet to watch TV programs that I missed	14	51	33	21	14	6	2	2
	17	51	43	26	23	13	3	1
I watch more online videos than TV during my free time	11	38	28	15	14	6	2	2
	17	46	47	27	20	12	5	2

(Upper figures: 2010; lower figures: 2015)

< Added in the 2015 survey >

Watching one online video leads me to watch other related videos	26	64	61	48	34	24	8	1
I use the Internet to watch just a portion of TV programs I want to watch	12	39	36	20	14	9	3	1

(4) Indispensable Media

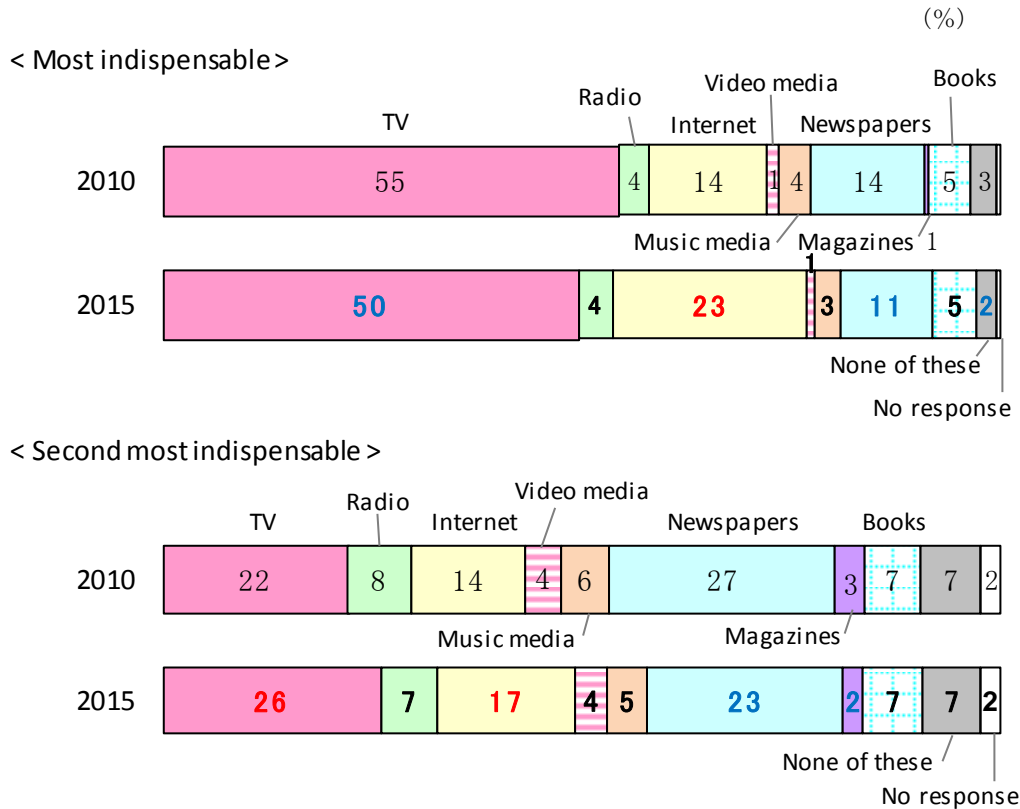
Given changes in media use, the survey included questions to probe the relative position of television vis-à-vis other media.

Television’s relative importance is declining

The survey asked respondents to select, taking into consideration various factors, what they consider the most indispensable and second-most indispensable of eight forms of media, including TV, radio, Internet, newspaper, and others (Figure 19).

“Television” was selected as the most indispensable media by the largest proportion (50 percent), followed by “Internet” (23 percent), and “newspapers” (11 percent). Compared to 2010, fewer people view television and newspapers as indispensable and more people view the Internet as indispensable. Chosen as second-most indispensable media were “television” (26 percent), “newspapers” (23 percent), and “Internet” (17 percent). Over the past five years, television and Internet have gained importance as the second-most indispensable media, while newspapers and magazines have declined. A larger proportion of people are rating television as the second-most important media and fewer are placing it first, demonstrating that television has declined in importance over this period of time.

Figure 19. Indispensable Media

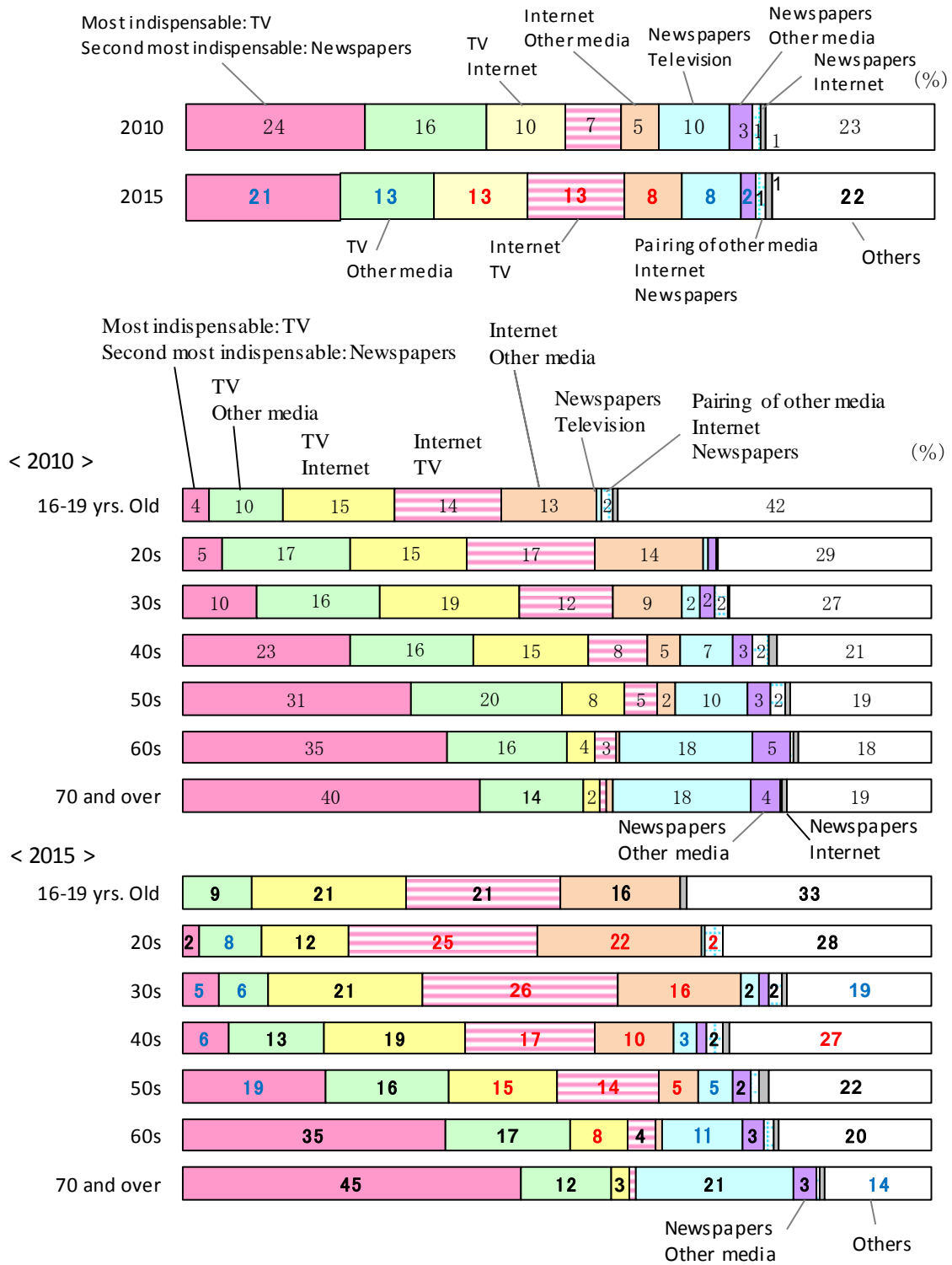


Younger generations favor Internet over TV

To explore changes in people’s ranking of television, Internet, and newspapers, which they chose as the most indispensable media, we showed them various combinations of media ranked most and second most indispensable (Figure 20). The largest proportion (21 percent) chose the “television (most indispensable) + newspapers (second most indispensable)” pairing, while 13 percent each chose “television + other media (media other than television, Internet or newspapers), “television + Internet,” and “Internet + television.” Compared to five years ago, pairings that include “Internet” (“television + Internet,” “Internet + television,” “Internet + other medium”) have been chosen by a larger proportion of people and the proportion choosing “television + newspapers,” “television + other media,” “newspapers + television,” and “newspapers + other media” has been declining.

By age, fewer people ranging from their 30s to their 50s have been choosing the “television + newspapers” pairing, while “Internet + television” and “Internet + other medium” have been chosen by more of those in their 20s to their 50s. Among those in their 40s and under, the proportion of those who chose “television + Internet” is unchanged, but more chose “Internet + television,” while about 25 percent of those in their 20s and 30s, the largest proportion, chose “Internet + television.” This shows that more younger and middle-aged people now consider the Internet more indispensable than television.

Figure 20. Pairings of Indispensable Media (Overall, by Age)



“Other media” refers to media other than television, Internet, and newspapers, i.e. radio, video media, music media, magazines, books, and “none of these.”

“The chart according to the varve displays a value of more than 2%.”

(5) Useful Media

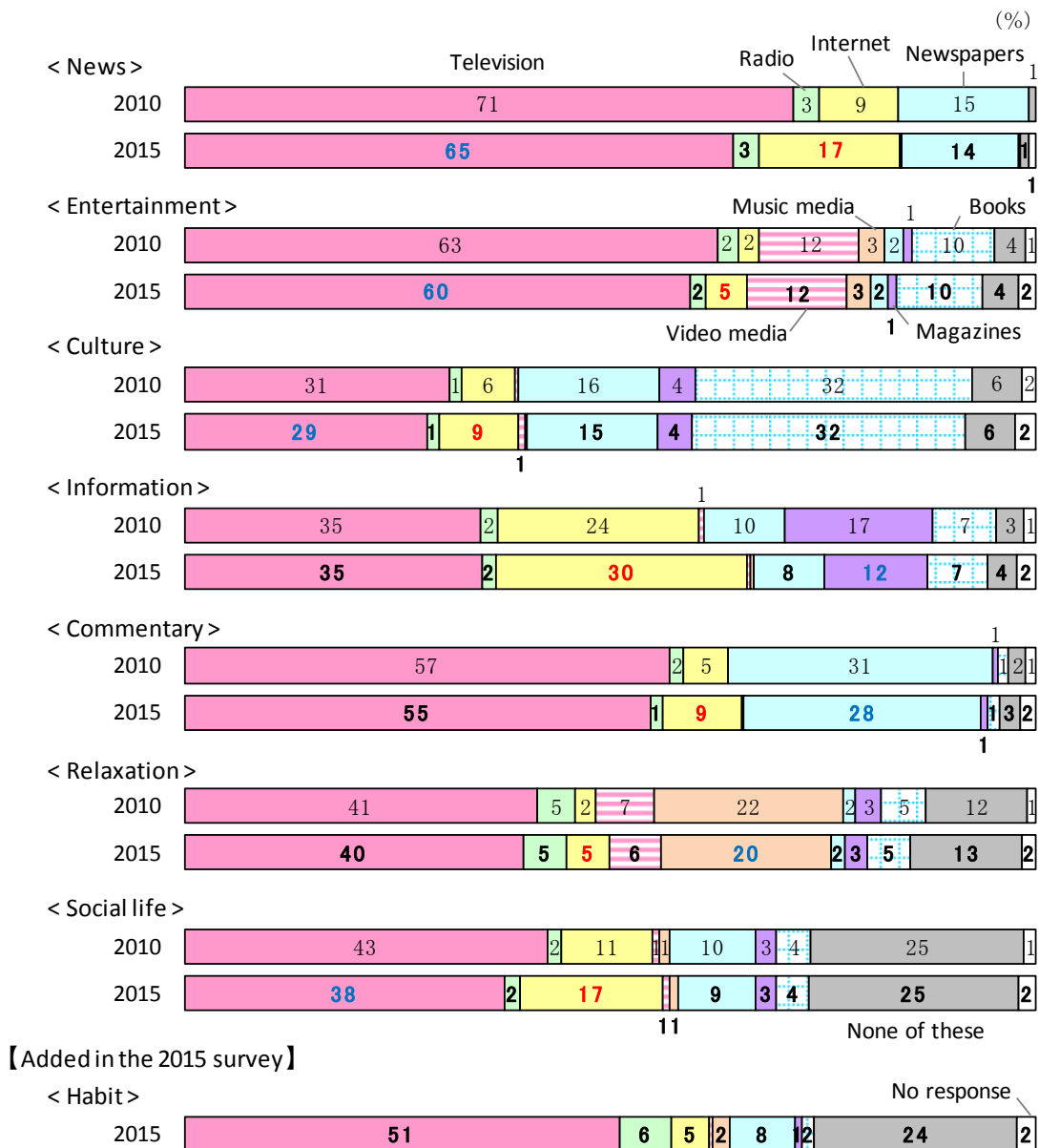
In the previous section, the examination of media considered indispensable media reflected individuals' overall evaluation of various media. Here we investigate how respondents feel about the functions of various media.

Television well regarded for various functions but less so now for “news” and “entertainment”

The survey asked respondents to select the most useful of eight forms of media with regard to eight functions such as “news,” “entertainment,” and “culture” (Figure 21). The eight functions are defined in the figure.

In the 2015 survey, television was the most-mentioned media for “news” (65 percent) and “entertainment” (60 percent). About half of people also named television useful as “a habit,” an item newly included in the 2015 survey.

Figure 21. Comparison of Useful Media

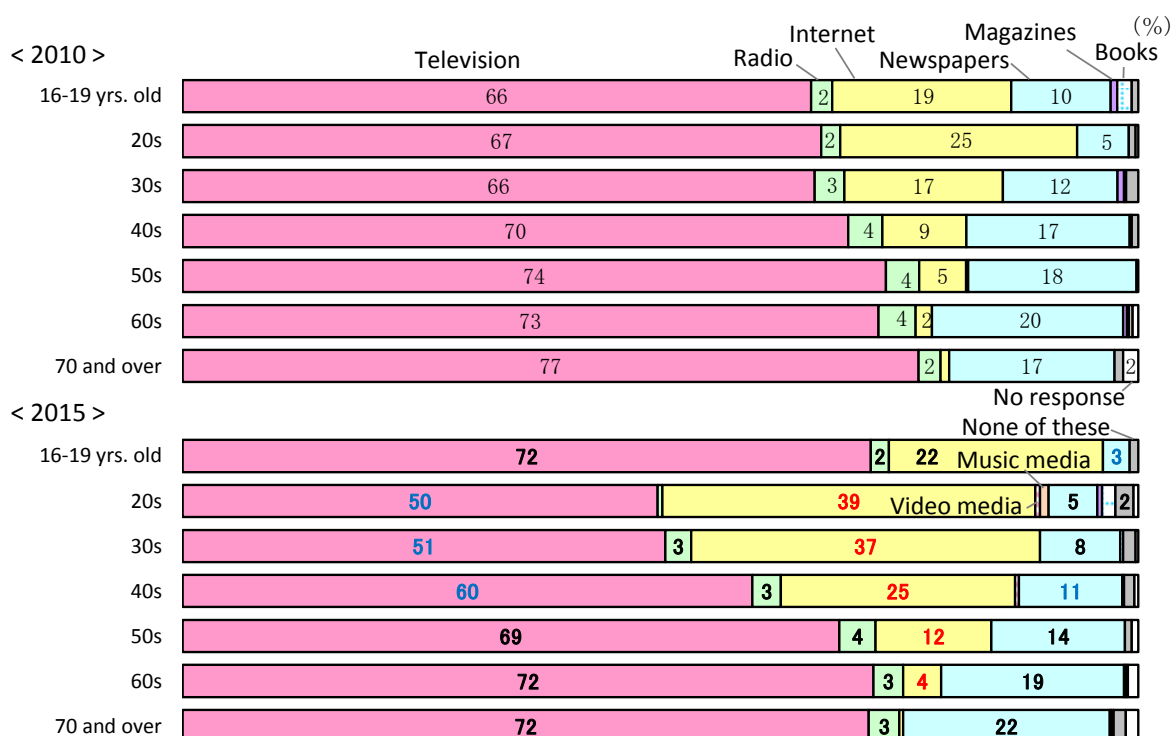


< News >	Learn about world events and trends
< Entertainment >	Get excited and enjoy
< Culture >	Acquire cultural information
< Information >	Acquire information about daily life and hobbies
< Commentary >	Gain insight into political or social issues
< Relaxation >	Rejuvenate and relax
< Social life >	Socialize and network with people
< Habit >	Impart a rhythm to daily life

Although some answer options differ from those in the figure, beginning with the 2000 survey, which used the face-to-face interview method, respondents were asked to compare the functions of various media. Since 2000, an increasing proportion has valued television for its “commentary” function, and television has been evaluated the most highly for its “news,” “entertainment,” and “commentary” functions. In the 2015 survey, with all functions except “culture” television garnered the largest number of responses. Although television is evaluated the most positively of all media, evaluation of its “news,” “entertainment,” “culture” and “social life” functions declined for the first time. “News,” the function of television evaluated the most highly, has shown the biggest drop (from 71 to 65 percent) since 2010.

By age (Figure 22), television is the answer given by the largest proportion of people in every age group, but has dropped the most markedly among those from their 20s to their 40s. The Internet, meanwhile, has gained more importance for its news function. Just under 40 percent of respondents in their 20s and 30s answered that the Internet is the most useful media for learning about world events and trends.

Figure 22. Comparison of Useful Media for “News” (By Age)

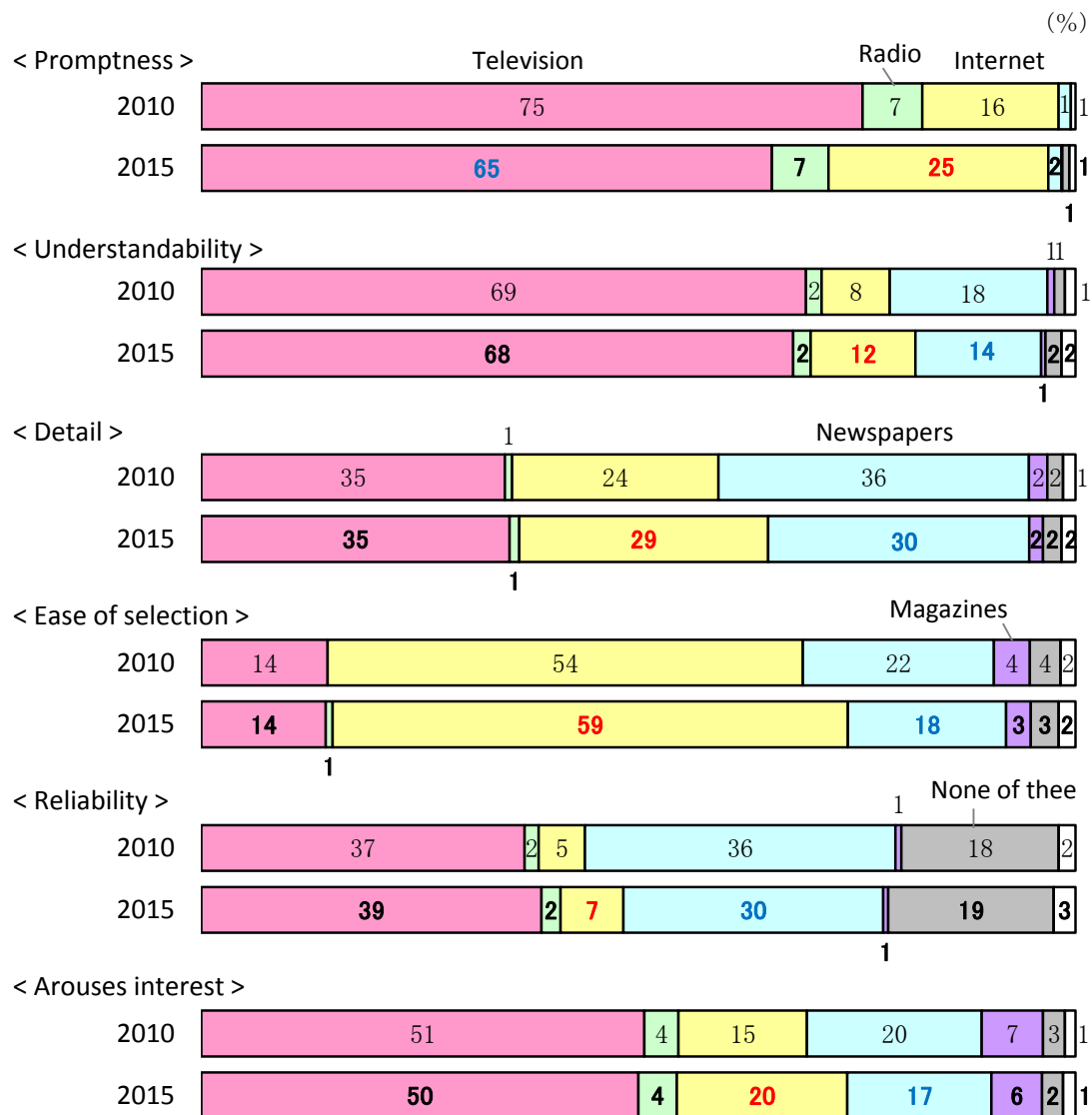


“The chart according to the varve displays a value of more than 2%.”

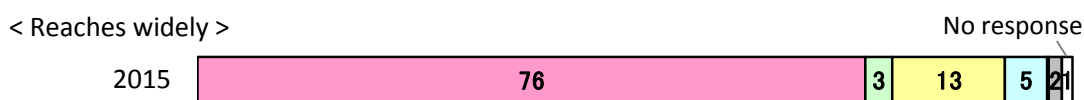
Television is less highly valued for “promptness”

Respondents were asked to indicate which of five forms of media were best for acquiring news and information in terms of seven different qualities (such as “promptness,” “understandability,” and “detail”) (Figure 23). The seven qualities are defined in the figure.

Figure 23. Comparison of Media Characteristics



【Added in the 2015 survey】

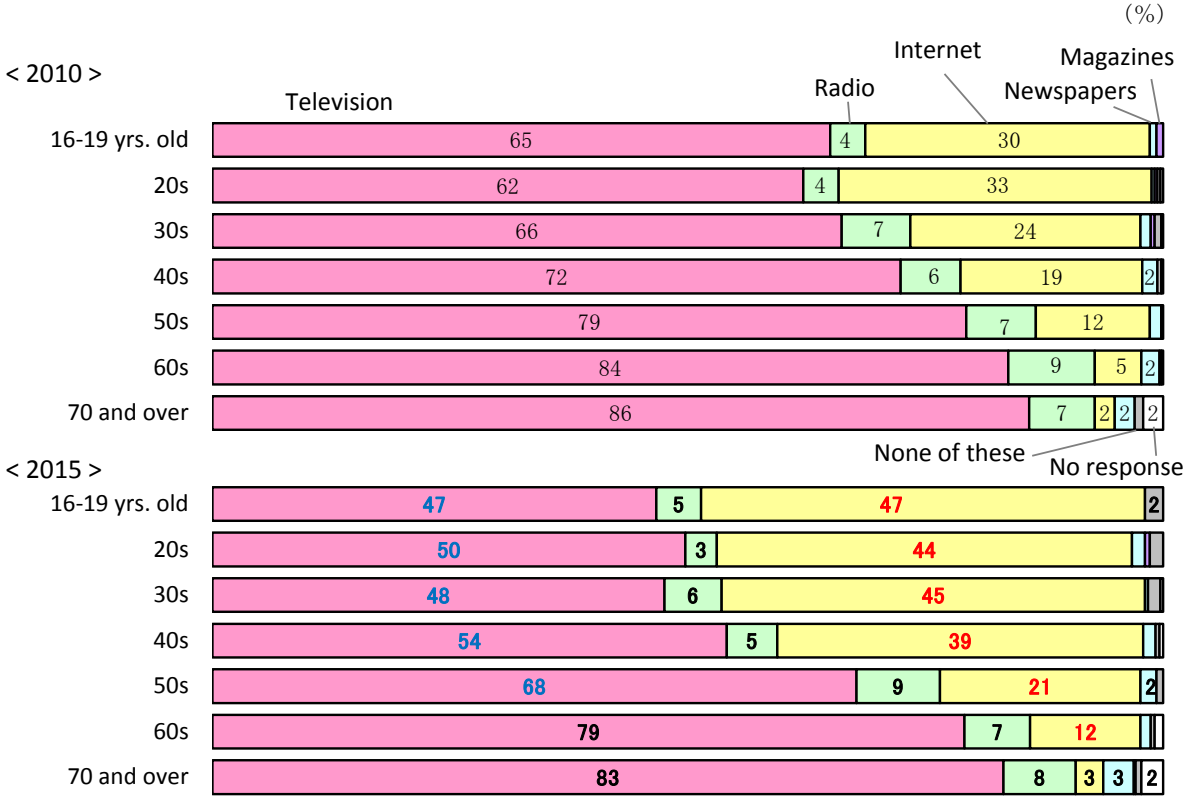


- < Promptness > Conveys information most promptly
- < Understandability > Information is easiest to understand
- < Detail > Provides the most detailed information
- < Ease of selection > Easiest to select only the necessary information
- < Reliability > Is the most reliable
- < Arouses interest > Arouses interest in a new topics
- < Reaches widely > Reaches the largest number of people

“Reaches widely (reaches the largest number of people)” was added in the 2015 survey, and television was chosen for this quality by three-quarters (76 percent) of respondents. More than half also chose television for “understandability,” “promptness,” and “arouses interest.” Opinions were evenly divided over which medium was best for “detail,” 35 percent choosing “television,” 30 percent “newspapers,” and 29 percent “Internet.” For “reliability,” 39 percent said “television” and 30 percent “newspapers,” while slightly less than 20 percent said “none of these.” Compared to 2010, “Internet” drew a larger proportion of responses for six qualities. Meanwhile, “television,” which the largest proportion of responses rated highest for “promptness” in 2010, suffered a large drop (from 75 to 65 percent). Newspapers were also evaluated less positively for qualities like “detail” and “reliability.”

By age (Figure 24), “television” was evaluated less highly for “promptness” by those in their 50s and under, whereas Internet was evaluated more positively for this quality by those in their 60s and under. Among those in their 30s and under, an equal proportion of people rated television and Internet best for “promptness.” These changes in comparison of media characteristics can be attributed to the changing media environment such as the spread of smartphones and mobile phones, which enable their owners to check news and information anytime and anywhere on the Internet.

Figure 24. Comparison of Media Characteristics—Promptness (by Age Group)



“The chart according to the varve displays a value of more than 2%.”

3. Views on Information and Influence of Television

This section looks at people’s opinions regarding information they get from television and various other media. It also examines perceptions of the influence of television.

(1) Attitudes toward Information

Most People Want to Select Information Themselves

Respondents were asked to indicate on a 4-point scale whether they agreed or disagreed with five statements concerning information (Figure 25). The statement that attracted the largest proportion in agreement (total for “agree” and “somewhat agree”) (85 percent) was “I want to select the information I need by myself,” indicating a strong desire to select information independently. The next-largest proportion (61 percent) was confident that they had the ability “to choose reliable information from among a plethora of information.” And about six in ten people (59 percent) said that “I tend to compare information from various media sources.”

Figure 25. Attitudes toward Information
(“Agree” + “Somewhat Agree”) (By Gender and Age)

(%)

	Overall	Men						Women					
		16-29 yrs old	30s	40s	50s	60s	70s and over	16-29 yrs old	30s	40s	50s	60s	70s and over
I want to select the information I need by myself	85	87	84	92	84	92	85	81	86	86	84	84	77
I am able to choose reliable information from among a plethora of information	61	62	67	62	61	67	69	52	54	60	63	59	58
I tend to compare information from various media sources	59	59	66	70	63	63	58	54	54	57	57	54	52
I am skeptical about any kind of information	44	62	58	54	44	49	40	47	39	39	32	34	42
More information is better, even if some of it is not very reliable	40	44	53	47	47	44	44	40	34	34	35	35	35

Middle-Aged men are more selective about information

By gender and age, over 80 percent of respondents except for women in their 70s and over agreed that they want to select the information they need by themselves. This is especially so

among men in their 40s, and 92 percent of those in their 60s want to do so. Compared to the overall sample, greater proportions of men in their 40s and under agreed with “I am skeptical about any kind of information,” as did men in their 30s and 40s for “More information is better, even if some of it is not very reliable,” and men in their 40s for “I tend to compare information from various media sources.” From this we can infer that while middle-aged men are more skeptical and less trusting about information, they want to select information on their own rather than being passive recipients.

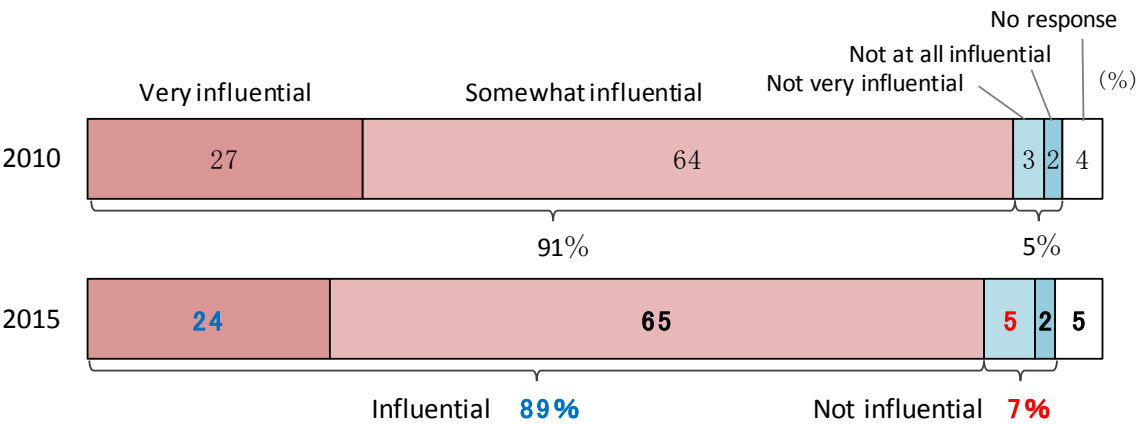
(2) Influence of Television

Fewer believe that television is influential

Respondents were asked how much influence they think television has on people’s perceptions and actions. Twenty-four percent responded that it was “very influential” and 65 percent that it was “somewhat influential,” for a total of around 90 percent who felt that television has at least some influence on society (Figure 26). But over the past five years, the proportion of those who believe that television is “very influential” dropped from 27 to 24 percent whereas more (up from 3 to 5 percent) now think that television is “not very influential.” Further, the total for “very influential” and “somewhat influential” declined from 91 to 89 percent.

The survey then asked respondents how much influence they thought television had on their own perceptions and actions. Seven percent said that television was “very influential” and 54 percent that it was “somewhat influential,” for a total of 61 percent. In other words, 90 percent believed that television influences society, but only about 60 percent believed that they themselves were influenced by television, a finding unchanged from the 2010 survey.

Figure 26. Influence of Television

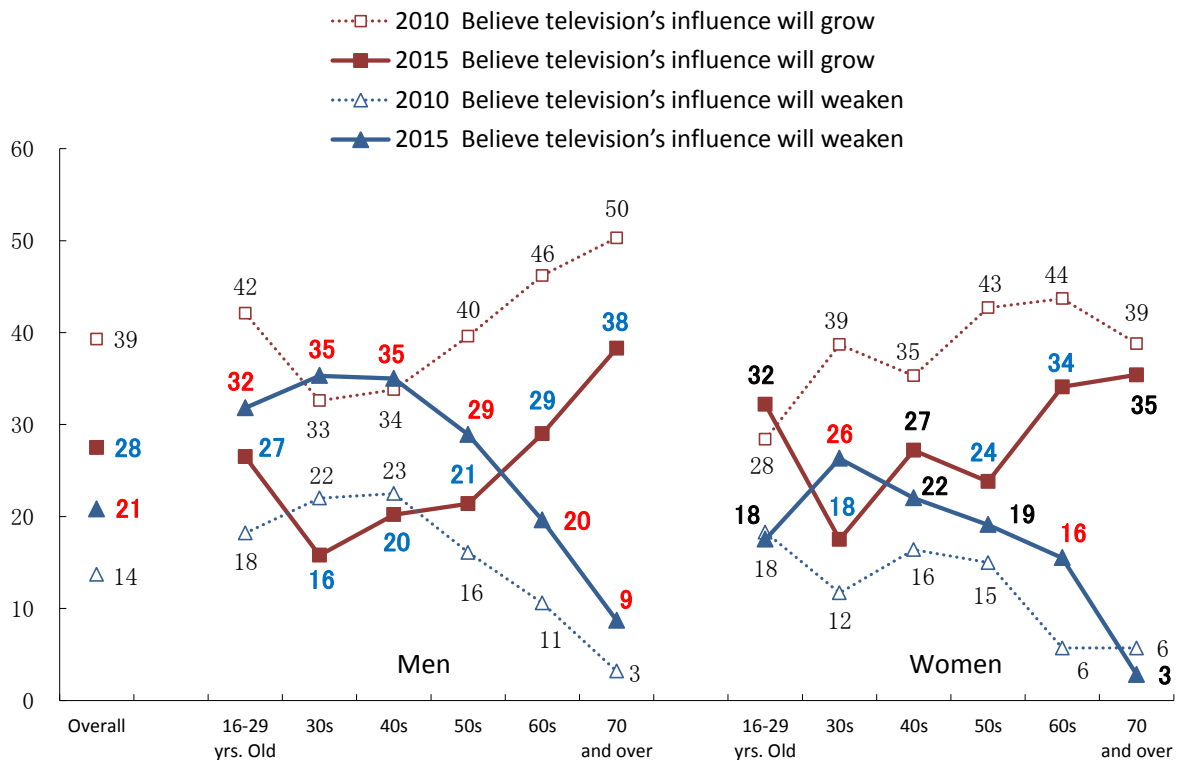


More feel that television’s influence is unchanged or weakening

The survey asked respondents about how influential they think television will have in the future. Over half, 51 percent, said that the influence of television “will not change,” 28 percent responded that it “will grow,” and 21 percent that it “will weaken.” Compared to five years ago, more people answered that television’s influence “will not change” (from 46 to 51 percent) or that it “will weaken” (from 14 to 21 percent), whereas fewer thought that it “will grow” (from 39 to 28 percent).

By gender and age (Figure 27), in 2010 people of age groups believing that television’s influence “will weaken” accounted for around 20 percent at most, and more people in all groups believed that its influence would grow rather than weaken. But in 2015, more men in all age groups and more women in their 30s and in their 60s thought that television’s influence “will weaken.” As a result, more men in their 30s and 40s, in particular, believe that it “will weaken” rather than “will grow.”

Figure 27. Influence of TV in the Future: “Will Grow” “Will Weaken” (By Gender and Age)



Results show a major change among middle-aged men regarding the future influence of television, but this segment also tended to be skeptical about all kinds of information and, saying “I want to choose the information I need by myself,” wanted to make their own decisions about information. This seems to point to a major shift in their attitude toward the information and media they rely on, most likely brought about by changes in the media environment, for example, the spread of the Internet which they can access information on their own. Further study will be needed to examine the relationship between the public’s attitudes toward information and media use.

Conclusion

This report mainly compares the findings of the 2015 survey with those of the previous survey in 2010, when the drop-off and pick-up survey was initiated. “The Japanese and Television” survey, started in 1985, is now 30 years old, and television continues to be an important part of daily life. But today the proportion of those who watch television daily has fallen to under 80 percent, and the overall number of hours spent viewing television in real time is shorter. Even middle-aged and older generations increasingly watch recorded TV programs and Internet videos, a practice that is becoming routine among younger people.

The survey found that people value television less nowadays, with fewer viewers having positive impressions such as “I love watching TV” or “I want to watch programs that are popular,” while more felt that “it is too much trouble to watch TV at fixed times, even for my favorite programs.” Overall, fewer middle-aged people now feel that television is an indispensable media.

As far as the news and entertainment functions of the media and promptness in providing news and information are concerned, people evaluated television more positively compared to other media, so it holds a top position in that respect. But the results of this survey show that television no longer holds the overwhelming lead for its news functions and promptness in supplying information, so it is beginning to lose its superiority as far as these qualities are concerned.

The results of the 2010 survey showed a gradual erosion of the niche television had established in people’s lives over previous decades, with fewer young people saying they watch television every day, and fewer people overall choosing it as the most indispensable media. The 2015 survey revealed a distinct change in attitudes and behavior toward television and other media not just among younger respondents but also among those in their 40s and 50s. We plan to continue analyzing these changes in the future.

“The Japanese and Television” Survey Outline

	Survey 1	Survey 2
Purpose	Time series survey using identical questions in order to track changes in public attitudes toward television	
Period	Saturday, March 6 to Sunday March 14, 2010	Friday, February 27 to Sunday March 8, 2015
Method	Drop-off and pick-up survey	
Population	Japanese aged 16 and older	
Sample	3,600 people (12 people x 300 spots) selected from the Basic Resident Registers by stratified two-stage random sampling	
Valid responses (%)	2,710 (75.3%)	2,442 (67.8%)