

**IPG Mediabrands Japan Conducts Proprietary Digital Media Survey, Media in Mind™ with a Focus on How People Spend their Spare Time
Younger Generations Tend to Spend Any Spare Time They Have on Digital Media, While Those 40s and Above Prefer TV**

TOKYO – January 25, 2024

IPG Mediabrands Japan (CEO & Country Manager: Koichi Sonoda, Headquarter: Minato-ku, Tokyo), the global media group of the Interpublic Group (IPG), has conducted "Media in Mind™: 2023 Digital Media Survey" with 2,400 respondents between the ages of 15 and 74. The purpose of this survey is to uncover people's usage behavior and attitudes towards digital media.

The Media in Mind™ Digital Media Survey is IPG Mediabrands' proprietary consumer survey that has been conducted annually since 2005. Evolutions in technology, communication, and people's living environment, such as the emergence of various new digital devices, the widespread penetration of social media, and acceleration of digital transformation (DX) due to the COVID pandemic have greatly affected people's media contact behavior and attitudes. The Media in Mind™ survey tracks the changes in people's digital media usage annually from a fixed-point perspective. In the 2023 survey, the focus was on gathering data on people's preferred media that they consume whenever they have any spare time.

This press release presents the following key findings from the survey.

<Key Findings>

- 1. In their spare time, younger generations tend to prefer spending time on digital media, while those 40s and above prefer TV.**
- 2. Results indicate that their choice of media is based on purpose: information gathering in the morning and during their commute to work or school; entertainment during the night when they want to unwind at home. By age group, data shows that teens prefer TikTok at home and music and/or audio streaming services while commuting, while those 60s and older prefer news apps/websites throughout the day.**

<Details of the Key Findings>**1. In their spare time, younger generations tend to prefer spending time on digital media, while those 40s and above prefer TV.**

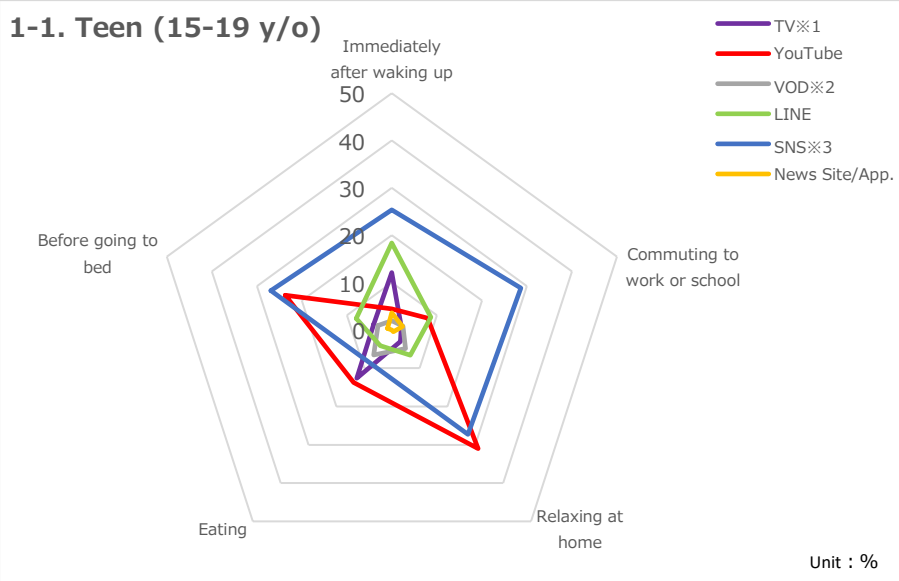
The daily life was divided into five different life scenes and media which were preferred in their “spare time” for each situation, were being interviewed and analyzed in four age groups (see Graphs 1-1 to 1-4). The survey results indicated that in their spare time, younger generations tend to prefer spending time on digital media, whereas those in their 40s and above prefer watching TV.

First, teens and those in their 20s-30s tend to lead a digital-centric lifestyle throughout the day (see Graphs 1-1 and 1-2). Specifically, they prioritize checking their social media throughout the day from “immediately after waking up” to “before going to bed”, such as using LINE right after they wake up and watching mainly YouTube after they return home (after they “unwind and relax at home”.) This tendency to prefer social media and YouTube is more prominent in teens than those in 20s and 30s.

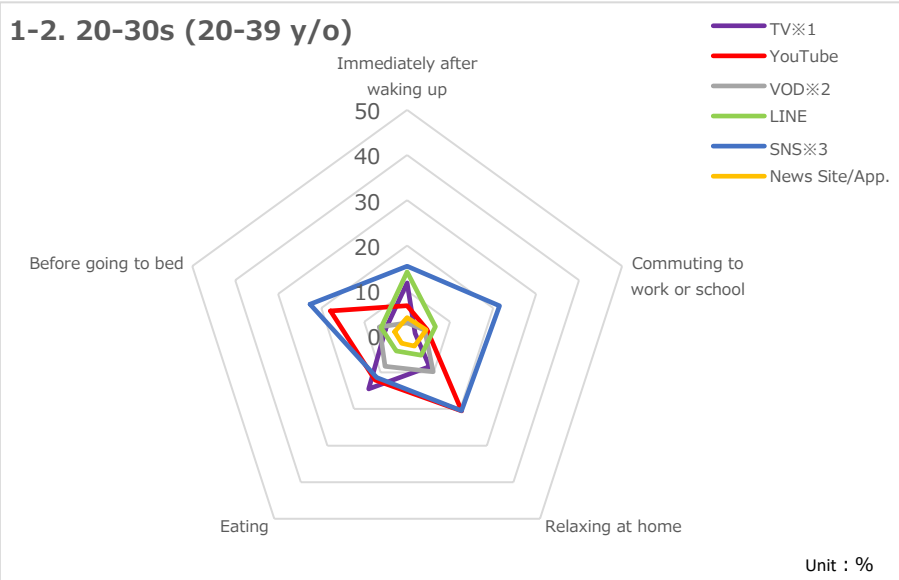
On the other hand, those in their 40s and above tend to prefer watching TV regardless of the time throughout the day (see Graphs 1-3 and 1-4). This tendency stands out amongst those in the 60s with over 40% preferring to watch TV the most “during meals” (see Graph 1-4). However, amongst those in their 40s and 50s, YouTube was viewed with the equivalent preference of watching TV “before going to bed” (see Graph 1-3) indicating that they enjoy viewing their favorite contents on YouTube before sleeping.

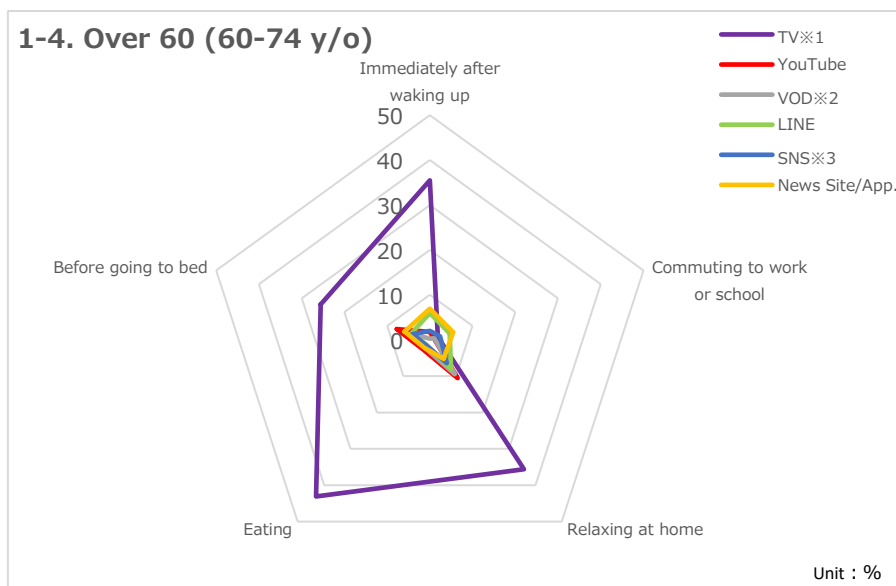
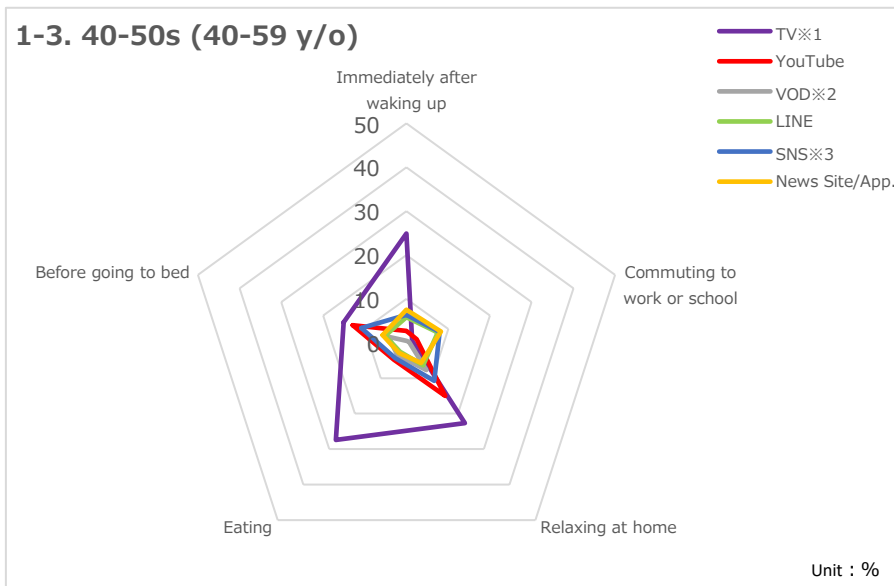
<Graph 1> Preferred media consumption per age group/life scenes (single answer per each life scene; aggregated answer for social media/video streaming)

1-1. Teen (15-19 y/o)



1-2. 20-30s (20-39 y/o)





※1 Preferring to watch either terrestrial TV or non-terrestrial TV

※2 Preferring to watch one of the four streaming services (TVer, Amazon Prime Video, ABEMA, Netflix)

※3 Preferring to watch one of the four social media services (X, Instagram, TikTok, Facebook)

- Results indicate that their choice of media is based on purpose: information gathering in the morning and during their commute to work or school; entertainment during the night when they want to unwind at home. By age group, data shows that teens prefer TikTok at home and music and/or audio streaming

services while commuting, while those 60s and older prefer news apps/websites throughout the day.

When taking a closer look at the overall 15-74 age group, it can be implied that their choice of media is based on purpose; from immediately waking up and during their commute to work, they would select media suited for information gathering and when they have returned home, they would select entertainment media (see Graph 2-1).

Specifically, X (Twitter) and news apps/websites suited for real-time information gathering were preferred from “immediately after waking up” to “commuting to work or school”, while YouTube with its strong entertainment aspect was preferred from “relaxing at home” and later on after returning home. In addition, although TV is used throughout the day, the results imply that the purpose of TV viewing changes throughout the day, such as watching news programs for information gathering while using TV as a timekeeper “immediately after waking up”, and enjoying variety shows and dramas after returning home.

A closer look by age group also reveals some distinctive characteristics, especially among Teens (Graph 2-2) and those in their 60s and above (Graph 2-3). First Teens are unique in that at home in their spare time, they give priority to TikTok among social media. This is especially true when they are “relaxing at home” (9%). Also, they prefer to listen to music/audio streaming services while “commuting to work or school” which is at 12%, higher than the overall rate of 4%.

On the other hand, among those in their 60s, while TV is by far the most viewed media, browsing news apps/websites is prominent throughout the day. For this age group, it is apparent that even after returning home they spend time gathering information. In addition, listening to radio/radiko tends to be frequent from “immediately after waking up” to “commuting to work or school”. It is a characteristic of 60s and above to prefer listening to radio/radiko for information gathering.

The results indicate that people’s choice of media is based on their objectives as they go about their day.

<Graph 2> Preferred media consumption by Teens and 60s and above (single answer per each life scene)

Graph2-1 All (15-74 y/o)

	Immediately after waking up	Commuting to work or school	Relaxing at home	Eating	Before going to bed
No.1	TV (Terrestrial) 18%	LINE 7%	YouTube 17%	TV (Terrestrial) 21%	YouTube 14%
No.2	LINE 9%	X (Twitter) 6%	TV (Terrestrial) 15%	YouTube 7%	TV (Terrestrial) 11%
No.3	News Site/App 6%	News Site/App 6%	LINE 6%	TV (Non-terrestrial) 5%	X (Twitter) 6%
No.4	X (Twitter) 5%	Music/Audio Streaming 4%	TV (Non-terrestrial) 6%	X (Twitter) 3%	LINE 5%
No.5	TV (Non-terrestrial) 5%	Instagram 4%	X (Twitter) 5%	LINE 3%	Instagram 5%

Graph2-2 Teen (15-19 y/o)

	Immediately after waking up	Commuting to work or school	Relaxing at home	Eating	Before going to bed
No.1	LINE 18%	X (Twitter) 14%	YouTube 31%	YouTube 14%	YouTube 24%
No.2	X (Twitter) 12%	Music/Audio Streaming 12%	Instagram 9%	TV (Terrestrial) 8%	Instagram 11%
No.3	Instagram 11%	Instagram 12%	TikTok 9%	TV (Non-terrestrial) 5%	X (Twitter) 9%
No.4	TV (Terrestrial) 8%	LINE 9%	X (Twitter) 8%	LINE 4%	LINE 8%
No.5	YouTube 4%	YouTube 8%	LINE 7%	TikTok 3%	TikTok 6%

Graph2-3 Over60 (60-74 y/o)

	Immediately after waking up	Commuting to work or school	Relaxing at home	Eating	Before going to bed
No.1	TV (Terrestrial) 30%	News Site/App 5%	TV (Terrestrial) 27%	TV (Terrestrial) 36%	TV (Terrestrial) 21%
No.2	News Site/App 7%	LINE 5%	YouTube 11%	TV (Non-terrestrial) 7%	YouTube 8%
No.3	LINE 6%	Radio/radiko 2%	TV (Non-terrestrial) 9%	YouTube 3%	News Site/App 6%
No.4	TV (Non-terrestrial) 6%	TV (Terrestrial) 1%	LINE 8%	News Site/App 2%	TV (Non-terrestrial) 5%
No.5	Radio/radiko 4%	Facebook 1%	News Site/App 5%	LINE 1%	LINE 4%

※ TV is grouped in yellow, Social media in blue, and others are color-coded by services.

※ Percentages in red if 5pts or higher than the total, percentages in blue if 5pts or lower than the total.

【Survey Outline】

- ◆ Survey period : Nov 24th-27th, 2023
- ◆ Survey method : Internet survey
- ◆ Survey conducted by : McCann Erickson Japan Inc.
- ◆ Survey respondents : 2,400 internet users aged 15-74 living in Kanto and Kansai regions
- ◆ Survey monitor provider : Cross Marketing Inc.

About IPG Mediabrands Japan

IPG Mediabrands in Japan is the Japanese office of IPG Mediabrands, established as the global media group of the Interpublic Group (NYSE: IPG) consisting of advertising companies such as McCann Erickson. Today, IPG Mediabrands has over 10,500 marketing communication experts in over 130 countries worldwide and operates a media investment amount of more than \$39B. In addition to UM, Initiative, BPN, and ORION Holdings, the company also owns specialist companies such as Magna Global, Kinesso, Ansible, Society, Rapport, IPG, and Media Lab. In Japan, IPG Mediabrands has been the only foreign media group that offers both media planning and buying for its clients since the founding of McCann Erickson (currently McCann Erickson) in December 1960.



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