PRESS RELEASE

Media in Mind™ survey conducted by
IPG Mediabrands, media group of IPG
Signs of "time-efficiency" fatigue?!
Exploring consumer attitudes and behavioral changes following two years post-Covid pandemic

【TOKYO – 3rd February 2025】
IPG Mediabrands Japan (CEO & Country Manager: Matt Ware, Headquarter: Minato-ku, Tokyo), the global media group of the Interpublic Group (IPG), has conducted "Media in Mind™: 2024 Survey" with Japanese 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 media.

The Media in Mind™ 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 media usage annually from a fixed-point perspective. In the 2024 survey, it focused on gathering data to analyze consumer attitudes and behavioral changes following two years post-Covid pandemic.

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

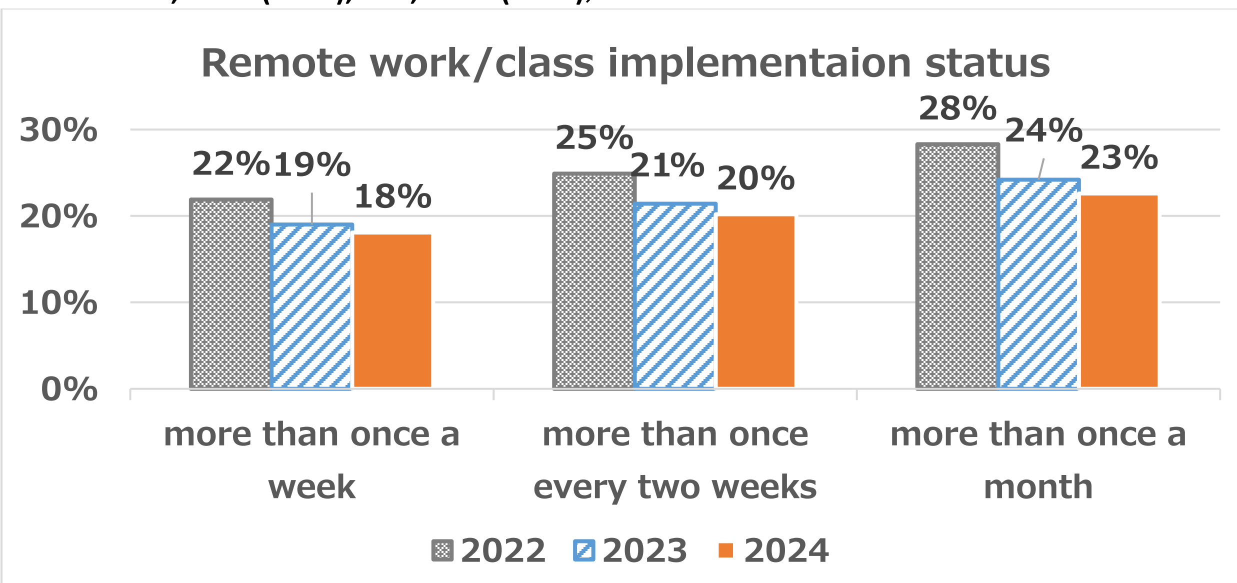
<Key findings>
1. No change but a slight drop in adoption rate of remote work/online-classes (more than once a month) from 24% (2023 Nov) to 23% (2024 Nov), establishing new ways of working for a certain segment.
2. Decline in everyday behaviors people used to spend time/money on; yet same level maintained as the previous year for "Oshi-katsu" (Fan support activity).
3. Decline in the perception "Face-to-face communication is important". This could be the result of no longer being restricted to face-to-face interactions.
4. Decline in the perception "Want to use the time as efficiently as possible". Signs of "time-efficiency fatigue"?!

＜Details of key findings＞

1.Although adoption rate of remote work (more than once a month) slightly dropped from 24% to 23%, it established new ways of working.

Adoption rate of working remotely and taking online-classes more than once a month was 24% in 2024 (Graph 1). Although this indicates a 5 point drop from two years ago, it remained almost the same from last year, suggesting new ways of working has been established.

<Graph 1>　Adoption rate of remote work/online-classes　（basis: students/employed persons　n=1,755ss (2024), n=1,724ss (2023)）

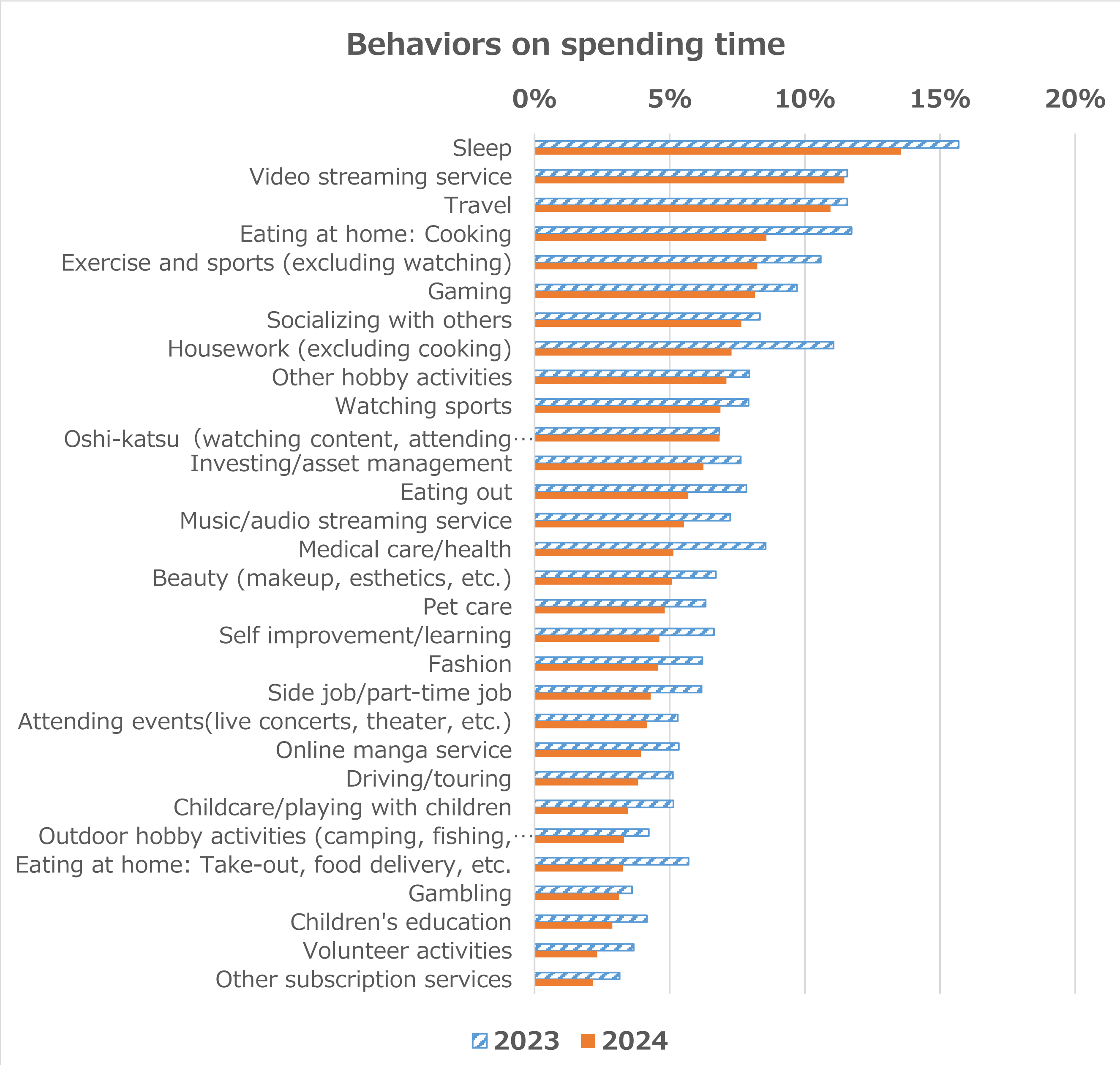


2. Decline in everyday behaviors people used to spend money/time on; yet same level maintained as the previous year for "Oshi-katsu".

Compared to the previous year, people are now spending less time on everyday behaviors they used to (Graph 2). During the Covid pandemic, people had more time to spare for "sleep", "cooking/housework" and "medical/health" but these in particular have all decreased. As for "Medical/health", this has decreased as people's lifestyles and health consciousness are now returning back to the pre-Covid levels. On the other hand, video streaming services and "Oshi-katsu" remain the same as last year.

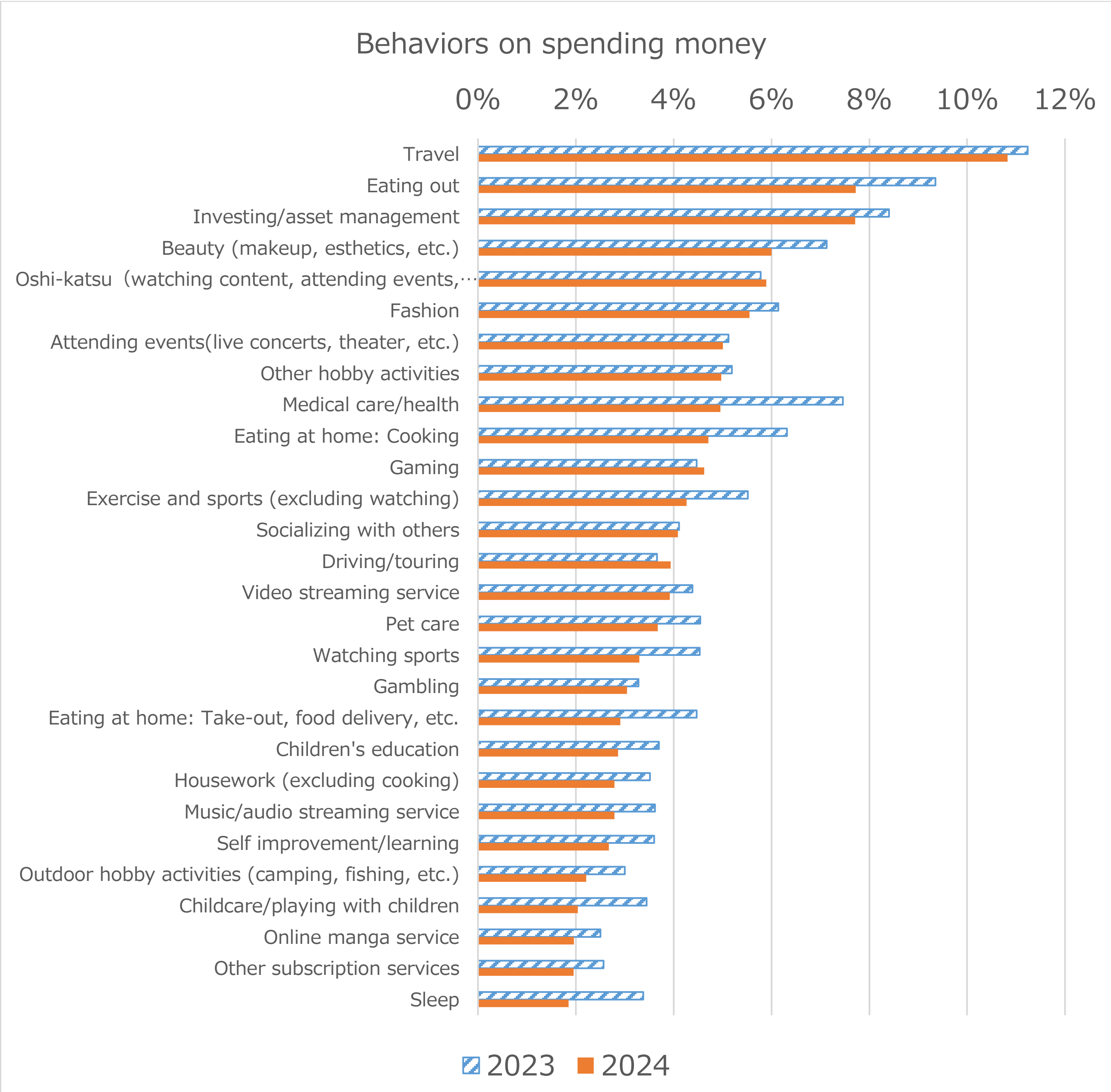
People are also now spending less money on most of their everyday behaviors as well (Graph 3). In particular, drop in food-related and medical/health-related spend stand out. These could be impacted by people's money-saving mindset stemming from rise in living cost, as well as due to the Covid pandemic starting to settle down. Yet, money spent for "Oshi-katsu" and "Event participation" remains the same as last year; the same trend for how people continue to spend time. It can be suggested that "Oshi-katsu" boom will likely continue as physical events have started to pick up together with the hybrid style of online-events, which make it easier for people to root for their "Oshi".

<Graph 2> Behaviors on spending time (basis: overall men/women15－74 years old n=2,400ss (2023,2024))



※2022 data is not shown because they cannot be compared apples-to-apples with 2023-2024 data as the survey method was different.

<Graph 3> Behaviors on spending money (basis: overall men/women 15-74 years old n=2,400ss (2023, 2024))

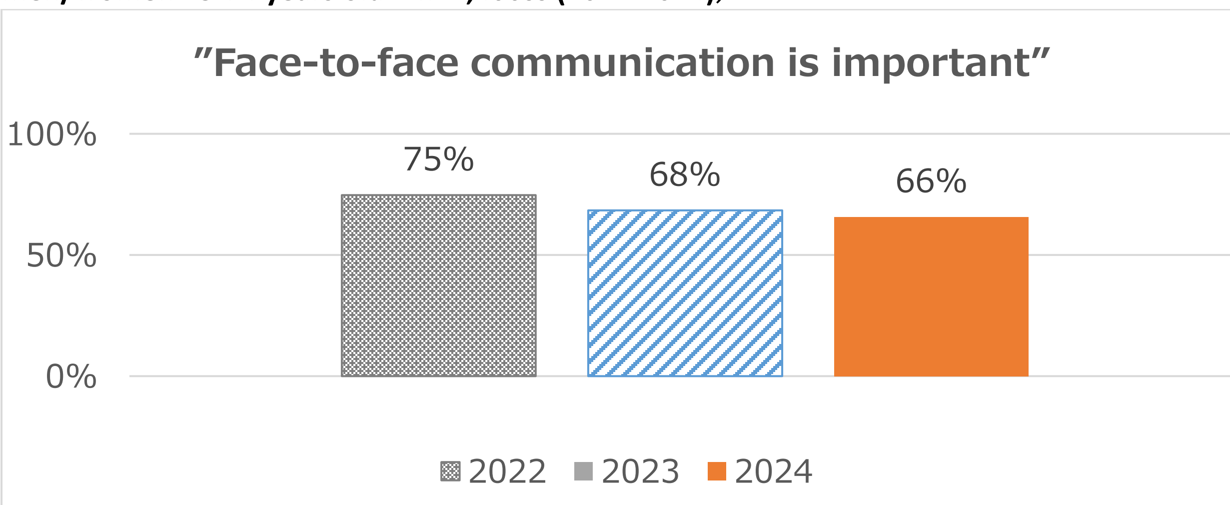


※2022 data is not shown because they cannot be compared apples-to-apples with 2023-2024 data as the survey method was different.
※"Behaviors on spending money" and "Behaviors on spending time" are only asked as a perception and are not based on actual behavior data. Therefore, this does not imply a decrease in actual time spent or money spent, but rather a perception that is apparent for individuals.

3. Decline in the perception “Face-to-face communication is important”. This could be the result of no longer being restricted to face-to-face interactions.

In terms of perception, a decline was also observed for several items. Among these, “Face-to-face communication is important” has declined significantly from 75% (2022) to 66% (2024), a 9 point drop in the past 2 years (Graph 4). During the Covid pandemic, the more face-to-face communication was restricted, the more its importance was felt. However, now that the restrictions have been lifted, and with remote work and online classes becoming the norm, fewer people are recognizing the value of face-to-face interactions.

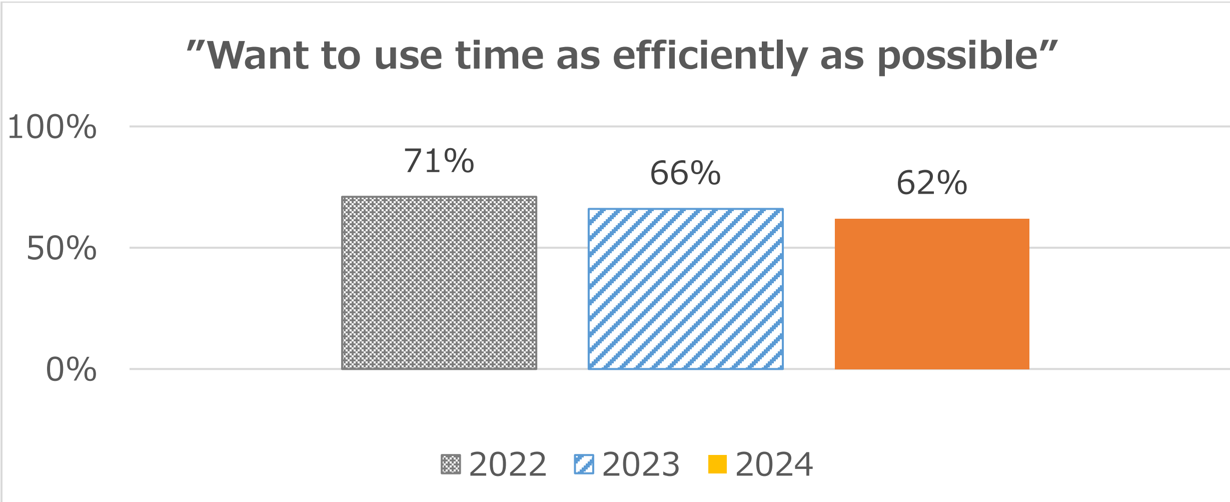
<Graph 4> Perception："Face-to-face communication is important"（basis: overall men/women 15-74 years old n=2,400ss (2022-2024)）



4. Decline in the perception “Want to use time as efficiently as possible”. Signs of “time-efficiency fatigue”?!

The perception related to time efficiency, “the desire to use time as efficiently as possible” has decreased from 71% (2022) to 62% (2024), a 9 point drop over the past 2 years (Graph 5). While remote work and online classes allowed for significant time efficiency by reducing commuting time, the decrease of this perception compared to 2 years ago may be due to the reduction in the adoption rate of remote work and online classes. However, when comparing to a year ago, as mentioned earlier, while the adoption rate of remote work and classes has remained almost unchanged (Graph 1), the perception of time efficiency has declined by 4 points. This suggests that the decline is not solely due to the decrease in physical remote work and classes, but rather that people have been chasing time efficiency which may have led to “time efficiency fatigue”.

<Graph 5> Perception："Want to use time as efficiently as possible"（basis: overall men/women 15-74 years old n=2,400ss (2022-2024)）



These changes indicate a shift in lifestyles and values after the Covid pandemic. We must continue to closely monitor changes in consumer perception and behaviors and take appropriate measures.

【Survey Outline】

◆Survey period：Nov 29th-Dec 2nd, 2024

◆Survey method：Internet survey

◆Survey conducted by：McCann Erickson Japan Inc./IPG Mediabrands Japan

◆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 18,000 marketing communication experts in over 130 countries worldwide and operates a media investment amount of more than $47B. In addition to full service agencies UM, Initiative, Mediahbub, the company also owns specialized business units such as MAGNA, KINESSO, ORION Holdings, Mediabrands Content Studio, and IPG 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 Hakuhodo (currently McCann Erickson) in December 1960.

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