

April 12, 2022

**Dentsu Japan Network Conducts
Its Sixth “Consumer Survey on Carbon Neutrality”
—Approximately 40% of consumers allow an “additional cost burden”
due to corporate carbon neutrality initiatives—**

Dentsu Japan Network (President & CEO: Norihiro Kuretani; Head Office: Tokyo; hereinafter referred to as “DJN”) conducted its sixth “Consumer Survey on Carbon Neutrality” (hereinafter referred to as “the survey”) from January 28 to 30, 2022. The survey was carried out by its DJN Sustainability Development Office and Dentsu Team SDGs, both of which promote sustainability projects across the Dentsu Group, and the respondents were 1,400 people across Japan with an age range spanning people in their teens to those in their 70s. This survey has been conducted continuously since April 2021, with the results announced in earlier press releases.

In this survey, DJN conducted surveys and analyses from various perspectives with regard to the changes in the awareness of consumers in Japan toward “carbon neutrality,” including the 14 priority fields identified in the “Green Growth Strategy Through Achieving Carbon Neutrality in 2050” (hereinafter referred to as “Green Growth Strategy”) announced by the Ministry of Economy, Trade and Industry in December 2020. In addition to the items that have been continuously investigated so far, this time DJN also investigated whether to prioritize carbon neutrality considerations or their cost burden.

Main Findings

1. The carbon neutrality recognition^{*1} rate was 58.2% overall (+1.6% from the previous survey^{*2}) and it has been steadily increasing since the first survey. In addition, 77.3% of consumers feel the need for efforts to achieve carbon neutrality (+1.6% from the previous survey).
2. Looking at the recognition rate of each item regarding carbon neutrality^{*3}, the “Paris Agreement” came out on top, and has maintained around 70% continuously from the first survey. The “Green Growth Strategy” has increased its recognition rate to around 50% (1st survey 40.3%→5th survey 43.5%→6th survey 47.2%) while the recognition rate of the “14 priority fields” established in the Green Growth Strategy was around 30%.
3. Regarding the implementation status of each initiative toward the realization of carbon neutrality, the initiatives with a relatively small difference between Japan and the world as a whole are, in order: “realization of the decarbonization of automobiles and storage battery technology,” “realization of a resource-recycling society (circular economy),” and

“promotion of CO2 absorption/fixation in agriculture, forestry and fisheries.” On average, 69.1% of the people believe that “the world is working more actively than Japan,” and there has been no significant change in this trend since the last survey.

4. From the content of the answers, the composition ratio is 39.9% for the strata who allow additional costs due to carbon neutrality considerations and 60.1% for the strata who seek cheaper prices rather than carbon neutrality considerations. The former have both high information sensitivity and influencing power, as well as a good understanding and awareness of the necessity of carbon neutrality. The latter have many child-rearing generation, and although there is a certain understanding of carbon neutrality, the emphasis is on low costs.
5. Looking at the factors that allow additional costs due to corporate carbon neutrality initiatives by expenditure item and age group, there are many expenditure items for which “reward points” rank first among people in their teens through their thirties, which is a major factor in the allowing of additional costs.
6. In the analysis by type based on “the implementation trend of Zero Carbon Action 30” and “price burden awareness,” the volume of those strata that make a high degree of contribution toward the realization of carbon neutrality increased.

- Since the composition ratio (%) in this survey is rounded off to the second decimal place, the total may not add up to 100%.

*1 Recognition (rate) is the ratio of the total number of consumers who answered “I understand the content” or “I only know the words” to the total number of respondents.

*2 Fifth survey (announced on January 20, 2022. Survey period: November 19 to 21, 2021)

*3 After answering the questions that led to Findings 1, all of the respondents acknowledged the content of the explanations given in the questionnaire before proceeding to answer the questions that led to Findings 2. The recognition rate here is the ratio of the total number of consumers who answered “I certainly know it” and “I have seen and heard it” to the total number of respondents.

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