

December 22, 2022

## **The Dentsu Group Conducts Its “Awareness of the Metaverse Survey 2022”**

—Awareness of the metaverse exceeded 70%, about four times that of the previous year, and the total annual usage amount for billing services also tripled—

Dentsu Group Inc. (Tokyo: 4324; ISIN: JP3551520004; President & CEO: Hiroshi Igarashi; Head Office: Tokyo; Capital: 74,609.81 million yen; hereinafter referred to as “the Company”) announced today that XRX STUDIO, the co-creative organization jointly formed by the Company’s in-house organization Dentsu Innovation Initiative and five Dentsu Group companies in Japan\*<sup>1</sup> in order to promote projects related to XR\*<sup>2</sup> technology, carried out its “Awareness of the Metaverse Survey 2022” (hereinafter “this survey”) from August 30 through September 2, 2022. The respondents were 2,000\*<sup>3</sup> people across Japan spanning an age range from 15 through 59. This survey is the second survey following the November 2021 survey, and the Company plans to conduct it every year going forward.

This survey was conducted in order to understand the current state of “recognition/understanding” and “interest/concern” regarding the metaverse in Japan, and to consider future penetration measures and utilization methods. Key findings from the survey, including changes from the previous year, are as follows.

### **Main results of this survey**

1. Recognition\*<sup>4</sup> of the word “metaverse” was 71.0% for all three generations\*<sup>5</sup>, up 52.4 points from the previous year\*<sup>6</sup>, and a significant four-fold increase. Noteworthy among them was the 40s–50s age group whose recognition rate was low last year. Their recognition rate was 71.8% this year, up 57.9 points from the previous year, making their result similar to that of the other two generations.
2. The annual number of billing service users in the metaverse increased 1.4–1.7 times year on year. The annual usage amount per person (average) also increased by 1.6–2.2 times compared to the previous year, and the total annual usage amount for billing services has tripled\*<sup>7</sup> compared to the previous year. In particular, the increase in the number of users among Generation Z males was large, with “purchase of avatars and avatar items” being 54.5%, 2.4 times higher than the previous year, and other items also increasing 1.5–2.3 times compared to the previous year.
3. Generation Z females are highly interested in being able to express their creativity freely in the metaverse.
4. For people who have experienced the metaverse there is a high number of items that show the characteristics of early adopters who are sensitive to trends and make their own decisions based on information gathering.
5. Generation Z, who have experienced the metaverse, are highly interested in self-producing and communicating with others, while those in their 40s and 50s are highly interested in reproducing the real world for their enjoyment.

In May this year, the Company launched its “Integrated Metaverse Solutions,” which comprehensively support the utilization of the metaverse by companies, and is working to further expand its solutions. Based on the knowledge gained from this survey, the Company will promote the metaverse business across the Group and will continue to conduct surveys in the future in order to contribute to the creation and expansion of the metaverse market.

Note: The composition ratio (%) in this survey is rounded off to the second decimal place, and so the total may not add up to 100%.

- \*1 Dentsu Inc., Dentsu Digital Inc., Dentsu Live Inc., Dentsu Promotion Plus Inc., and Information Services International-Dentsu, Ltd.
- \*2 Technology that encompasses realities such as virtual reality (VR) and augmented reality (AR)
- \*3 The total number of responses from “Male,” “Female,” “Other/Don’t know,” and “Don’t want to answer”
- \*4 The ratio of the total number of consumers who answered “I know what it is” or “I have seen or heard of it” to the total number
- \*5 The survey’s target generations are divided into three groups: Generation Z (15–26 years old), Millennials (27–39 years old) and 40s–50s.
- \*6 “Awareness of the Metaverse Survey 2021” (Period: November 2–4, 2021). The results of that survey are published in this release.
- \*7 Total obtained from the sixth item “Annual number of billing service users x annual usage amount per person (average)” and compared with the previous year

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