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NEWS RELEASE

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Dentsu 2024 Immersive Media Survey Results

—Respondents aged 10 to 19 more likely to have experience using immersive media—

Dentsu Inc. (President & CEO: Takeshi Sano; Head Office: Tokyo) today announced the results of its nationwide 2024 Immersive Media Survey of 100,000 respondents aged 10 to 59. The poll, held between August 26 and September 2, 2024, was conducted by XRX Studio, an interdivisional organization of dentsu Group companies in Japan. The studio conducts projects involving extended reality (XR).[1]

The survey was conducted both to determine the current level of awareness, understanding, and use of immersive media in Japan, as well as to consider ways of using and popularizing immersive media in the future. The poll's scope was thus wider than Dentsu's Awareness of the Metaverse Survey, which has been conducted annually since 2021.

For the poll, immersive media was defined as gaming systems equipped with 3D graphics, the metaverse, and augmented reality (AR) advertising.

Respondents were asked about eight types of immersive media, including gaming and networking services popular in Japan and other countries, and seven popular social networking services, including messaging and video sharing services.

Key findings of the survey are presented below.

Key findings[2]

1. **55.5% of all survey respondents were aware of at least one immersive media service listed in the survey. Awareness was highest (89.8%) for those aged 10 to 19.**
2. **20.8% of all survey respondents had used at least one of the immersive media services listed in the survey. Use was highest (65.3%) for those aged 10 to 19. Use was about five times higher than the 12.6% reported by all other age groups combined. Respondents spent an average of 59.8 minutes a day per immersive media service, compared with 46.6 minutes a day per social networking service. The difference is more than 13 minutes.**
3. **More than 70% of survey respondents enjoyed using immersive media services with real-world friends and acquaintances. The top three answers were "I enjoy using the services to play games with my friends" (78.9%); "I enjoy using the services while messaging or calling my friends" (73.7%); and "I enjoy using the services when together with my friends" (72.0%).**

4. **48.8% of survey respondents had created 3D content, such as an avatar or a virtual world, when using immersive media services. Those who often created 3D content were mostly respondents in their 20s (23.2%).**

Notes:
1. Extended reality (XR) is a general term for technologies that create new experiences by combining real and virtual environments, such as virtual reality (VR), augmented reality (AR), and mixed reality (MR).
2. The survey results do not always add up to 100% because they have been rounded to the first decimal place.

Details of the findings

1. **55.5% of all survey respondents were aware of at least one immersive media service listed in the survey. Awareness was highest (89.8%) for those aged 10 to 19.**

- Among all respondents, 55.5% were aware of at least one of the eight major immersive media services listed in the survey. By age group, awareness was highest (89.8%) for those aged 10 to 19, and declined with each older age group. The rate was 65.4% for respondents in their 20s, and 57.9% for those in their 30s (See Chart 1.)
- Awareness of social networking services was over 90% overall, with an average of 94.8% of respondents indicating awareness of at least one of the seven major services listed in the survey (See Chart 1.)

Chart 1.
Responses to the question, “Are you aware of any of the immersive media services and social networking services listed in this survey?”
(The results below are for all respondents in every age group.)

Respondents Aware of at Least One Service

(%)

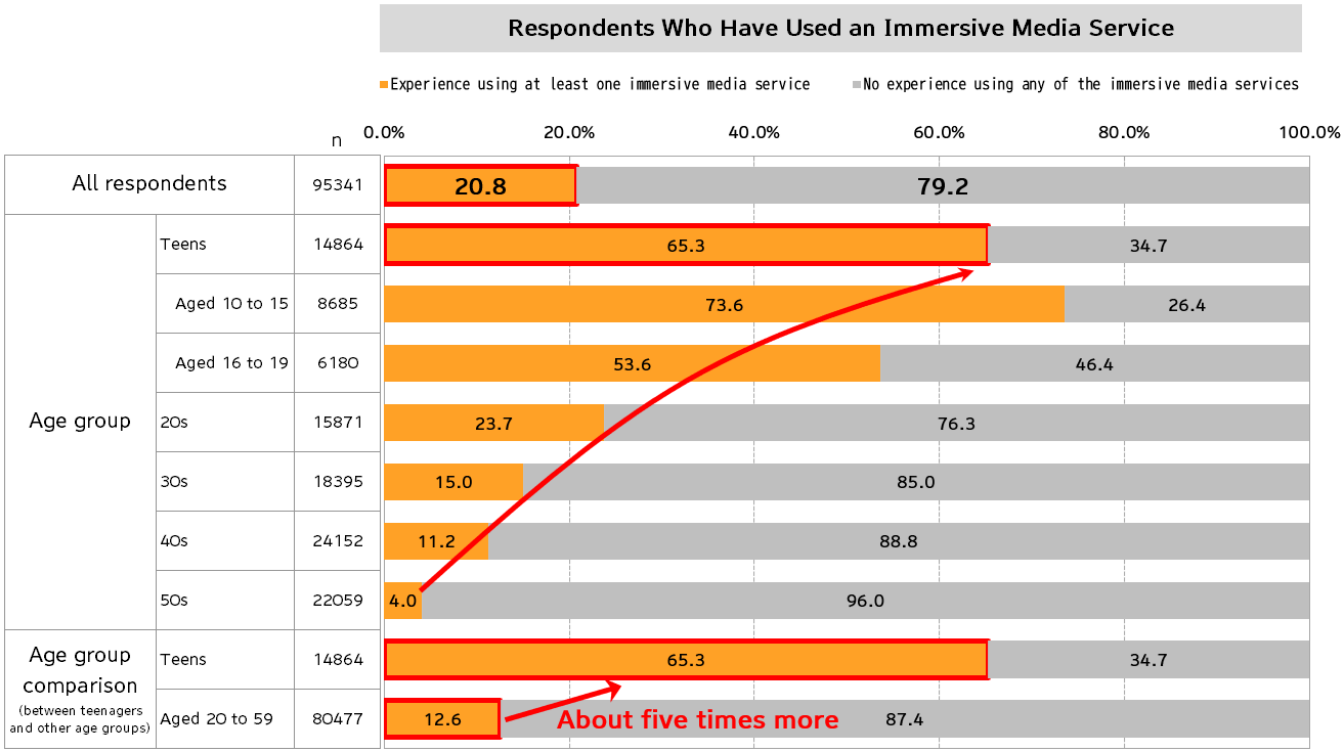
		n	Immersive media services (At least one selected from the eight listed)	Social networking services (At least one selected from the seven listed)
All respondents		100000	**55.5**	**94.8**
Age group	Teens	15453	89.8	95.6
	20s	16855	65.4	93.1
	30s	19438	57.9	94.1
	40s	25278	51.3	95.2
	50s	22976	28.0	95.8

2. **20.8% of all survey respondents had used at least one of the immersive media services listed in the survey. Usage was highest among those aged 10 to 19 (65.3%), about five times higher than the rate of 12.6% reported by all other age groups combined. Survey respondents spent an average of 59.8 minutes a day per immersive media service compared to 46.6 minutes a day per social networking service, a difference of more than 13 minutes.**

- Of all the respondents, 20.8% had experienced using at least one of the eight immersive media services listed in the survey. The rate of use progressively declined from the youngest to oldest age groups. Respondents aged between 10 and 19 had the highest rate (65.3%). This is about five times higher than the 12.6% reported by all other age groups combined (See Chart 2.)
- Respondents who had used immersive media and social networking services during the prior month reported spending an average of 59.8 minutes a day per immersive media service, and an average of 46.6 minutes a day per social networking service. The difference is about 13 minutes per day (See Chart 3.)

Chart 2.

Responses to the question, “Have you ever used any of the immersive media services and social networking services listed in this survey?”
(The results below are for respondents of every age group who indicated awareness of the services.)



Note: The chart only shows results for use of immersive media services.

Chart 3.

Responses to the question, “If you have used any of the following immersive media services and social networking services in the past month, how much time per day did you spend using them? Please consider the total amount of time if you used them multiple times per day.
(The results below are for respondents of every age group who had reported using immersive media services during the prior month.)

Average Time Spent Each Day per Service[*1]

Immersive media services				Social networking services	
Average time spent (minutes per day)	Number of respondents[*2]	Age group	Difference (minutes per day)	Number of respondents[*2]	Average time spent (minutes per day)
59.8	13082	All respondents	**+13.2**	228468	**46.6**
67.6	6712	Teens	+2.5	43761	65.1
53.1	2162	20s	−0.5	43774	53.6
53.6	1788	30s	+9.2	45480	44.4
50.4	1873	40s	+12.8	52894	37.6
44.1	547	50s	+10.3	42560	33.8

*1 Results are weighted averages.

*2 The numbers represent those respondents who have used any of the eight immersive media services and seven social networking services.

[Differences between immersive media and SNS]
- More than 10 minutes
- More than 5 minutes
- Less than 5 minutes
- Less than 10 minutes

3. More than 70% of survey respondents enjoyed using immersive media services with real-world friends and acquaintances. The top three answers were “I enjoy using the services to play games with my friends” (78.9%); “I enjoy using the services while messaging or calling my friends” (73.7%); and “I enjoy using the services when together with my friends” (72.0%).

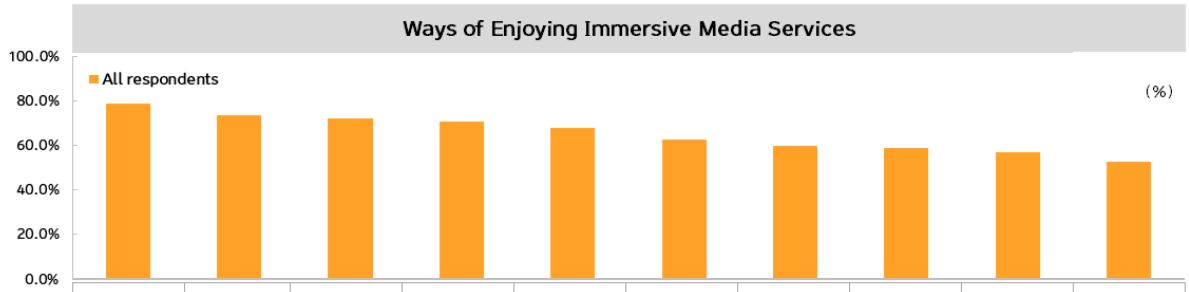
- The top three ways of enjoying immersive media services that respondents had used in the prior month were “I enjoy using the services to play games with friends” (78.9%); “I enjoy using the services while messaging or calling friends” (73.7%); and “I enjoy using the services when with friends” (72.0%). This indicates that these services are mainly used for social purposes in the real world. The three answers were also the top three selected by respondents aged 10 to 19 (See Chart 4.)

- The answer “I enjoy service content, such as games, in-game items, and live streams, produced by my favorite developers and creators,” was chosen by 77.1% of respondents in their 20s. These

respondents account for the highest percentage of those who chose seven of the 10 possible answers, but not three of the answers (“I enjoy using the services to play games with friends,” “I enjoy using the services while messaging or calling friends,” and “I enjoy using the services when with friends.”) (See Chart 4.)

Chart 4.

Responses to the question, “Which of the following answers best describes how you enjoy experiencing immersive media services listed in this survey that you have used in the past month?” (The results below are for respondents of every age group who had used immersive media services within the previous month.)



[Differences from all respondents]
Higher than 10 ppts
Higher than 5 ppts
Lower than 5 ppts
Lower than 10 ppts

		n	To play games with friends	While messaging or calling friends	When with friends	By using content (games, in-game items, and live streams) produced by favorite developers and creators	By customizing avatar (changing clothing and in-game items) to improve its appearance	By playing games with acquaintances I only connect with online	By using services while messaging or calling acquaintances I only connect with online	By customizing my avatar while referring to the customized avatars of friends and acquaintances	By sharing experiences and occurrences through services on other social media platforms	By creating my own content (games, in-game items, and live streams)
All respondents		8230	**78.9**	**73.7**	**72.0**	**70.8**	**67.9**	**62.4**	**59.6**	**58.7**	**57.0**	**52.6**
Age group	Teens	4591	84.2	78.0	75.5	71.2	65.9	59.1	55.3	54.9	52.4	48.6
	20s	1239	78.4	77.1	73.1	77.1	77.1	73.8	73.6	70.9	71.0	65.6
	30s	1033	70.5	64.7	65.7	70.8	68.4	63.4	62.2	60.7	61.3	56.6
	40s	1050	67.6	61.7	64.5	63.3	65.9	62.5	59.1	57.7	56.7	51.9
	50s	318	67.6	65.2	63.4	63.8	65.4	62.8	61.8	62.5	55.6	48.0

Note: The results are the percentages of respondents who selected the answer, with answers shown in descending order for all respondents.

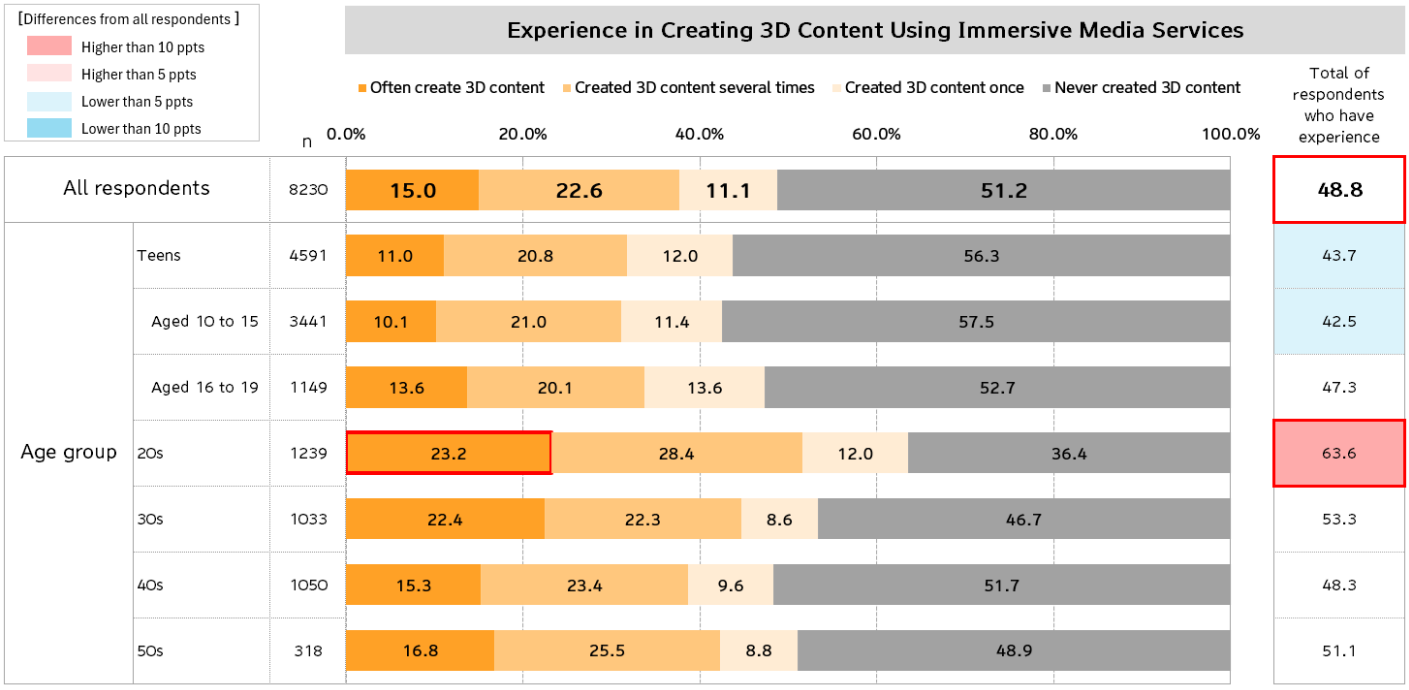
4. **48.8% of survey respondents had created 3D content, such as an avatar or a virtual world, when using immersive media services. Those who often created 3D content were mostly respondents in their 20s (23.2%).**

- Among respondents who had used immersive media services in the prior month, almost half (48.8%) had used a service to create 3D content, such as an avatar or a virtual world. These respondents reported they had done so often, several times, or once. The result was highest (63.6%) among respondents in their 20s. Likewise, the answer "I often create 3D content" was most commonly selected (23.3%) by this age group (See Chart 5.)
- Of all respondents who had created 3D content using immersive media services, those who had used VR goggles, tablet computers, and PCs were 20.5, 15.1, and 13.1 percentage points, respectively, more numerous than all the respondents who had created 3D content using immersive media services (See Chart 6.)

Chart 5.

Responses to the question, "Have you ever created 3D content, such as an avatar or virtual world, using any of the immersive media services listed in this survey that you have used in the past month?"

(The results below are for respondents of every age group who had used immersive media services within the previous month.)

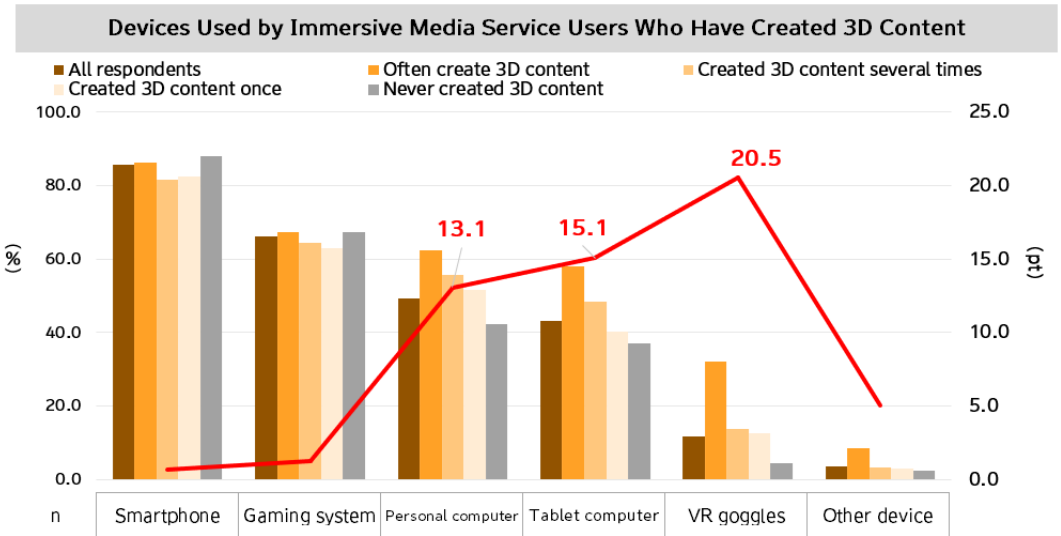


Note: The Total of respondents who have experience includes "Often create 3D content," "Created 3D content several times," and "Created 3D content once."

Chart 6.

Responses to the question, “Have you ever created 3D content, such as an avatar or virtual world, using any of the immersive media services listed in this survey that you have used in the past month?”
(The results below are for respondents of every age group who had used immersive media services in the previous month.)

Responses to the question, “Which of the following devices did you use when accessing the immersive media services listed in this survey that you have used in the past month?”
(The results below are for respondents of every age group who had used immersive media services within the previous month.)



		n	Smartphone	Gaming system	Personal computer	Tablet computer	VR goggles	Other device
All respondents		8230	**85.7**	**66.2**	**49.4**	**43.1**	**11.6**	**3.6** (%)
Frequency of 3D production	Often create 3D content	1237	86.3	67.4	62.5	58.1	32.1	8.6
	Created 3D content several times	1862	81.7	64.6	55.7	48.3	13.6	3.2
	Created 3D content once	916	82.5	62.8	51.6	40.1	12.6	3.0
	Never created 3D content	4214	87.9	67.2	42.3	37.0	4.4	2.4

Note: The red line in the graph shows the difference between the percentages of all respondents who have created 3D content and those who often create 3D content by device use.

Comments on the survey by XRX Studio

For our previous survey on the metaverse in 2023, we had defined the metaverse as a virtual space in which users interact and conduct economic activities in a three-dimensional environment.

However, we realized that this characterization is commonly associated with people immersed in virtual spaces to socialize, pursue romance, and spend their lives detached from the real world.

That said, people have been communicating even more in new forms of virtual spaces, such as 3D gaming platforms that allow users to enjoy interacting with others in their spare time.

However, the trend does not align with how the metaverse is generally conceived. We thus expanded the scope of the survey this time by focusing on immersive media, so as to encompass a wider range of digital media experiences.

The survey shows that the use of immersive media services has been spreading mainly among people between the ages of 10 and 29. A notable finding is that the survey respondents used the services longer, on average, than they used social networking services.

Many of the respondents indicated that they enjoyed using immersive media services to message and call their real-world friends and acquaintances. This indicates that, among teenagers, interacting with friends through immersive media services may be emerging as a mainstream trend. In the meantime, messaging apps and social media are commonly being used by older generations to communicate with friends.

While the survey found that the use of immersive media services was highest among respondents between the ages of 10 and 19, experience in creating 3D content using these services was highest among men in their 20s and 30s.

This appears to be related to the fact that people under 20 tend to have comparatively fewer skills and development tools. But, as these young people—now known as the immersive media generation—grow older and start using their own computers, and as technical innovations make content development easier, they can certainly be expected to produce better-quality 3D content in the future. That, in turn, is likely to expand the market for immersive media services.

Looking ahead, XRX Studio plans to continue conducting research on immersive media and to publish its findings.

Survey overview

Objective:	To determine the current level of awareness, understanding, and use of immersive media in Japan, and to consider ways of using and popularizing immersive media in the future.
Targeted area:	Japan nationwide
Sample size:	100,000 respondents*
Survey method:	Online questionnaire
Survey period:	August 26–September 2, 2024
Survey administrator:	Dentsu Macromill Insight, Inc.

* The survey sample of 100,000 was weighted to reflect the gender and age composition of Japan's population (based on the 2020 national census). The survey sample size and results shown in percentages were calculated on this basis.

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