

WHAT THE FUTURE: ENTERTAINMENT

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GAME CHANGERS





How will we entertain ourselves in the future?

MTV turns 40 this year. Give or take, half of Americans have only lived in a time when MTV existed. Just under a third were born since the Internet became mainstream roughly 25 years ago. These are just a couple benchmarks on the gradient of change that “entertainment” has undergone.

In 2019, pervasive media was a theory. In 2020, the “pervasive” idea became persuasive as it accelerated into undeniable reality. Today we have multiple screens—and screenless voice assistants—always mediating our work, our entertainment, our social lives, our classrooms and our doctor’s visits. We’re not going back, we’re pushing forward, into the metaverse.

“How do you separate entertainment from games or commercials? Do you even try?”

In this new reality, creators, platforms, companies, brands and even our cars compete for the audience’s attention. Entertainment is currency, converted into cash as we buy goods through social media, or into “Robux,” the money of gaming platform Roblox, and spent on virtual sneakers for our avatars. Roblox, which just went public, launched in 2004, which means that today’s developers on the platform likely grew up there.

The lines have all blurred. How do you separate entertainment from games or commercials? Do you even try?

Forty years on, video didn’t kill the radio star as the first video that MTV aired posited. Radio and voice entertainment continue to evolve. Video did create video stars, now spread over countless streaming platforms. “YouTuber” is a popular career ambition now, at least in my house. It’s also developed by super creators in committed relationships to the big streaming platforms.

Has it all been disrupted, in the end? Will all the new streaming services just lead us back to a bundled model like cable? Will it matter if we’re staring at a TV, a phone, a laptop or even the inside of a VR headset or glasses if we’re still just staring at a screen?

You will read about these topics here. But we also think back to another early MTV success, Dire Straits. We suspect that there will always be a core audience, shaking their heads at the YouTube, the TikTokers, the Twitch streamers and the Instagram influencers. The curmudgeons will mutter to themselves that the billion plays of “unboxing” videos mean they’re just getting their money for nothing.

Matt Carmichael is editor of *What the Future* and vice president of editorial strategy at Ipsos in North America.

In 2020 lockdowns, our lives shifted to screens

For Americans, everything is mediated

Q. Which of the following are you currently using or doing more now as a function of the COVID-19 crisis? (Top 8 responses)

37%

Streaming services to watch TV shows/content

37%

Social media

31%

Video chat with friends and family

30%

Home delivery or pick up from restaurants

23%

Playing video games

22%

Telehealth doctor visits

22%

Instant messaging

15%

Home delivery of groceries

Media has become pervasive ... and we're not going back

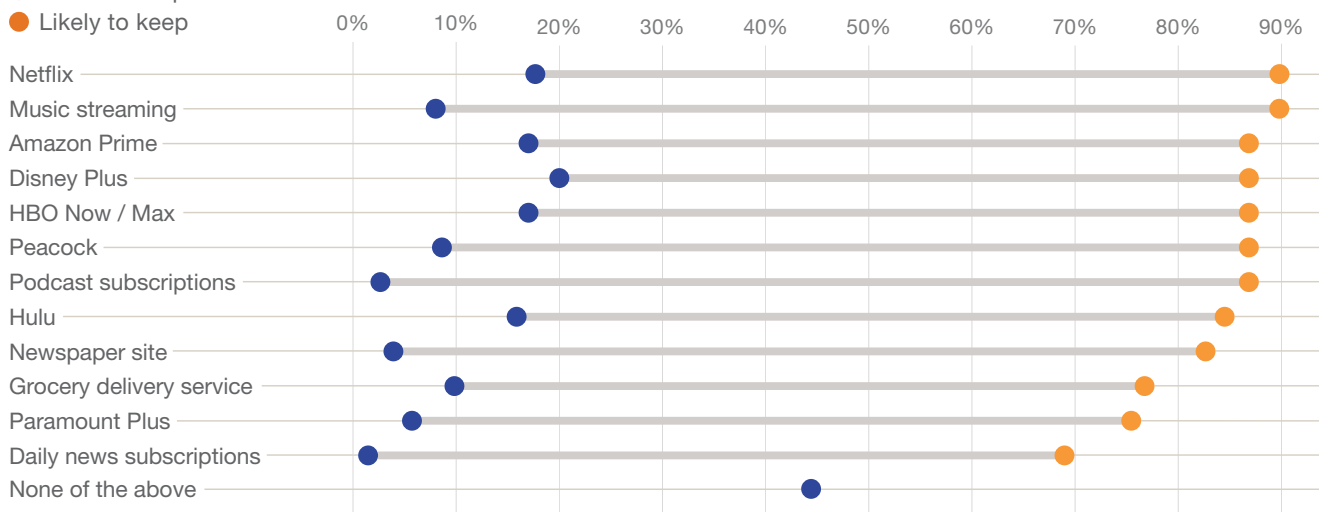
What people subscribed to for the first time vs. what they are likely to keep post-pandemic

Q. Which of the following subscription services did you sign up for the first time in 2020?

How likely are you to keep subscribing to this service once pandemic restrictions are fully lifted?

● New subscriptions

● Likely to keep



Viewing content at home is a more viable option than ever

Q. Given the choice, assuming both were equally safe or possible, would you rather do the following in person or at home?

View new-release movies:



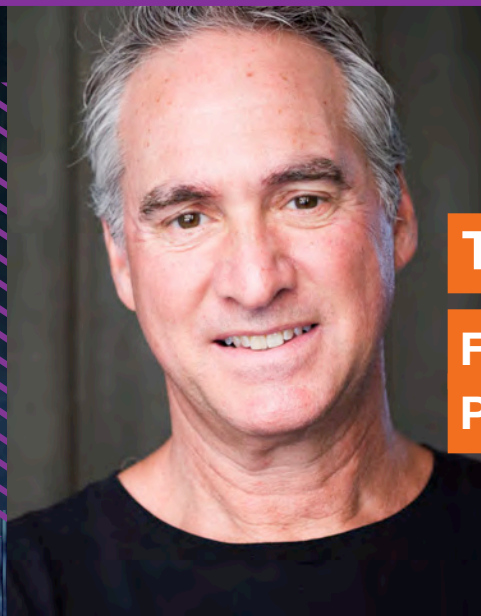
(Source: Ipsos Coronavirus Consumer Tracker conducted Apr. 27-28, 2021, among 1,115 U.S. adults.)

The Big Question:

How can brands engage audiences where they're headed?

Question:

How will technology shape entertainment content?



Ted Schilowitz

**Futurist-in-residence,
Paramount Pictures**

New and emerging technologies have dramatically changed how people access and consume entertainment.

Ted Schilowitz has been helping Hollywood do that for more than a decade. As futurist-in-residence for Paramount Pictures, and its parent, ViacomCBS, he explores ways to use virtual and mixed reality to craft future consumer media experiences. When he thinks **What the Future**, he looks to history for clues about what's next.

69%

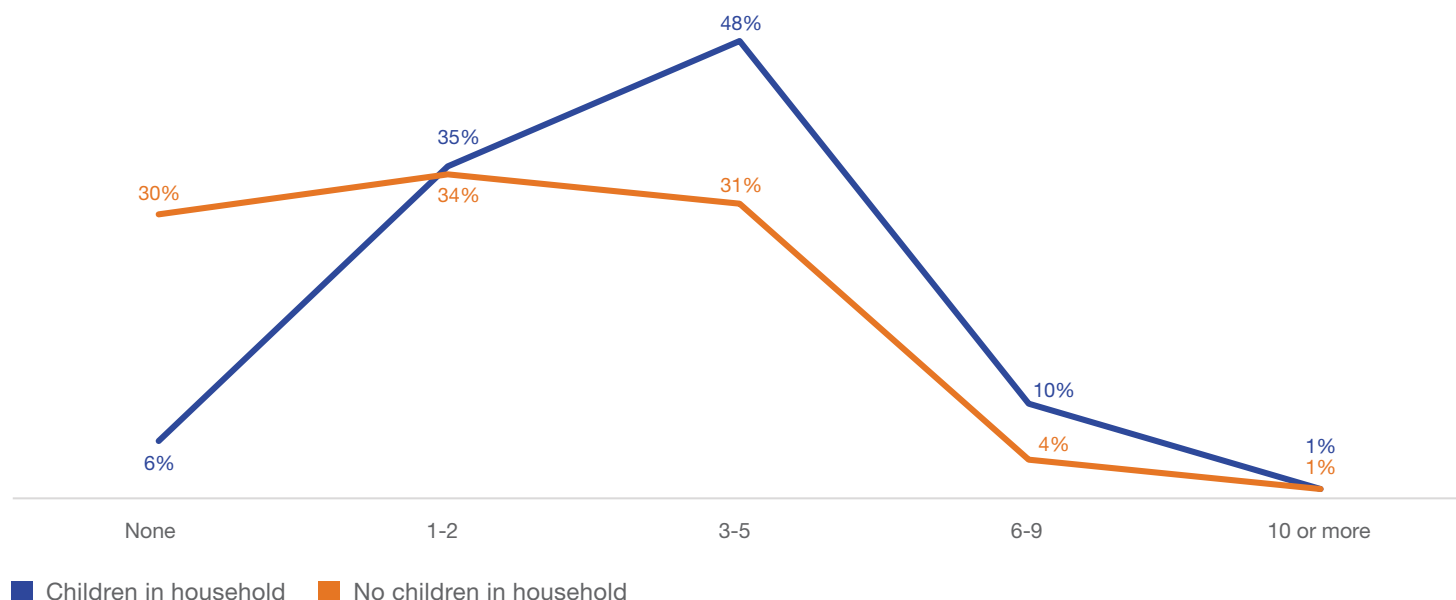
of Americans spend less than \$50 each month for paid streaming video services.

(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)



What drives streaming subscriptions?

Q. How many streaming video services in total, including those that are free, do you or your household subscribe to or use regularly?



(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)

Kate MacArthur: What we call home video entertainment has largely been accessed from our TVs for most of its history. How will entertainment technology change that in the future?

Ted Schilowitz: When we study new media technology like virtual reality, augmented reality, mixed reality, and what they bring as a broad platform for moving the entertainment quotient forward, they are still in their fairly early adopter phases. The beginnings of that maturity will be in the mid-2020s, call it 2024, 2025. You'll start to see this full maturity and a very large, robust business starting to look like the media before it in the same scope and scale by the year 2030.

MacArthur: How will we get content in the future?

Schilowitz: It's always been a technology business. It used to be that big movie studios owned the media pipes because they would distribute the media. Guys would drive a truck around with film cans and drop them off. The modern extrapolation of that is, oddly enough, Amazon. AWS [Amazon Web Services] is likely the biggest player today in the modern metaphor

"When you talk to young people, they do not have the brand loyalty, per se. They have content loyalty and they have character loyalty."

of the guy dropping the film cans off at the local theater. Then the other tech giants realized this is a humongous opportunity that they're not fully capitalizing on. So everybody else gets in the game.

MacArthur: It's pretty much still like cable, right?

Schilowitz: Yes. It just gets better and more efficient and the barriers to entry get lower, the ability to create more content gets much easier and much more robust.

MacArthur: We started out with three TV channels and now we've got 800 plus. With all this platform bundling happening, content has changed. Where is it going?

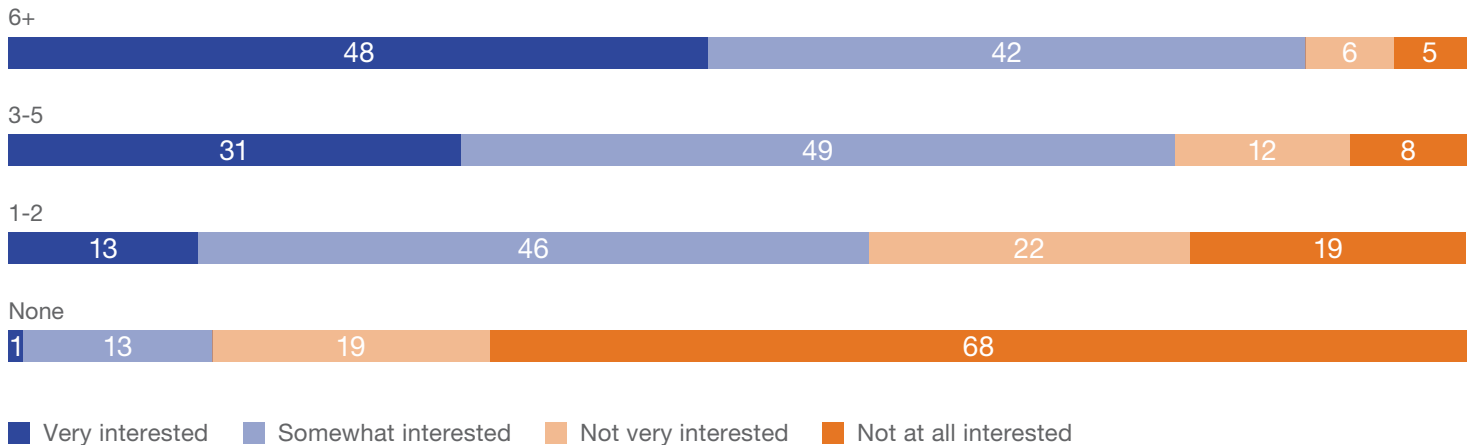
Schilowitz: The age of brand identification with networks and large media organizations is a generational thing, and that generation is largely in the rear-view mirror. When you talk to young people, they do not have the brand loyalty, per se. They have content loyalty and they have character loyalty. One of the byproducts of this streaming dynamic is that a lot of media you can find in multiple places and the tech companies are obfuscating and creating an illusion of where you get it from. The professionals in my world and the other giant media organizations are studying that a lot, to look at how to pull this back and start to maybe re-grab the land that they didn't realize was so valuable. That is starting to become a media trend, identifying who made it and who is representing it and who is "distributing" it out to the masses.

MacArthur: Although we can watch content from anywhere now, it's mainly passive viewing. How do you expect entertainment to become more interactive?

Who is more likely to want a streaming bundle?

Q. How interested would you be in a service that bundles multiple streaming services?

Number of streaming services subscriptions



(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)

Schilowitz: There's always little sidebar experiments about branching narrative and choose-your-own adventure and all that stuff. They all can garner some degree of audience. But if they're just bridging what we refer to as traditional passive media, and don't put a lot of thought into gaming as a business or as a creative pursuit, they actually missed the point. Interactive entertainment in many forms has been growing faster than traditional passive media and makes up a very, very large part of the economics of entertainment. I think gaming is the right venue for interactive media.

MacArthur: If things progress as much as you expect, how will what we watch change?

Schilowitz: Passive is the right format for passive and interactive is the right format for interactive. Those are gaming and "television" and movies, but what's happening is we are blending them together. And the virtual reality, mixed reality side of this allows a new blending agent that is even more compelling and more logical to put traditional narrative story and interactive together into one new form of media. What virtual reality allows you to do is strap a theme park onto your face.

"Audiences are always looking for what's expected and then unexpected. And if you can put those two together, you can crack the code."

MacArthur: Another change we're seeing in our research is that the most avid audiences today are not white Americans.

Schilowitz: In many ways, Viacom was the pioneer in that technology television revolution, beyond the three over-the-air channels that primetime network television largely represented. Viacom saw that there were different audiences

we could entertain and deliver something relevant and important to, so we quickly ended up with 14 or more dedicated network brands on this then-newfangled technology called cable television that touched different market segments.

MacArthur: Media is more pervasive than ever. What will that mean for brands that are still concerned about capturing eyeballs?

Schilowitz: Audiences are always looking for what's expected and then unexpected. And if you can put those two together, you can crack the code. That's event-driven. Go to the movies. That's going to start happening as we all get vaccinated.

The other parts of the media sphere, which live in streaming, are much more character-driven, more story-nuanced, more important to take the time to absorb something and learn about those characters over X amount of hours. The perfect example for me is "Breaking Bad" as one of the best character-driven TV shows, or maybe "The Wire" or the "Sopranos." It is that kind of fodder that people really want to go into those characters' worlds and live inside.

Kate MacArthur is deputy editor of What the Future and deputy editor of editorial for Ipsos in North America.

Will better representation on TV drive more viewers in mainstream content?



The protests in the latter half of 2020 stirred a renewed relevance about the lack of diverse representation and equity in society, including on television. As the media industry is a visible sector of where this gap and ongoing marginalization occurs, it will be an important player in fixing this problem.

While 62% of the TV viewing audience is white, they are less devoted watchers than the 36% of non-white viewers, according to the Ipsos TV Dailies survey. It begs the question: Would mainstream platforms have better viewership if non-white audiences were better represented? It follows that having content that represents growing viewer groups, whether large or small, is important to appeal to them. When entertainment content has better representation, producers and brands can capture a greater share and more loyal viewers.

The Ipsos survey shows that Black Americans (44%) are disproportionately avid weekly viewers of TV content overall compared to white viewers (40%). At the same time, Hispanic/Latino and Asian Pacific Islander communities currently under-index (39% and 37%, respectively) vs. white audiences (40%) when it comes to watching TV content weekly. This likely stems from two things:

1) They don't see themselves or their stories in the mainstream. The laws of media economics dictate audiences flock where the content is. If these groups don't see themselves in the content on the platforms they expect, they will have fewer reasons to gravitate toward these platforms. The work here will be for Hollywood to feature their stories more prominently in the mainstream.

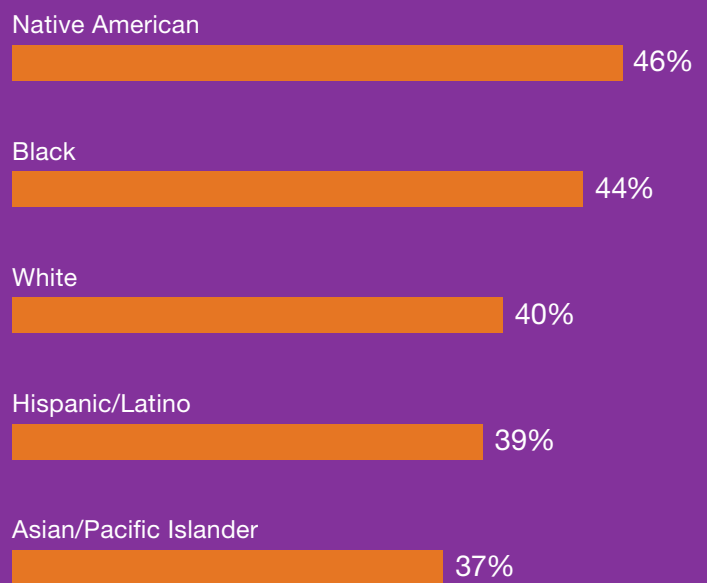
2) They consume content elsewhere. These groups are also more likely to "skinny-bundle," or buy smaller content access packages where they are better represented (i.e., via Hispanic or Spanish language-programming or Asian programming). Bringing these platforms or offerings into mainstream platforms may lead to better representation, as would bringing more brands into these more focused, culturally-driven platforms.

The recent TV and film awards-show season amplifies the mainstream success of the Asian- and female-directed film "Nomadland," and streaming content that features African American stories and actors like "Soul," "Ma Rainey's Black Bottom" and "Judas & The Black Messiah." These don't have to be niche, and if they become less niche, all audiences may come together.

Dorothy Ann Advincula is a senior vice president of U.S Audience Measurement & Insight in Ipsos' Media Development service line.

Does TV content reflect its viewers?

Q. In a typical week, on how many days do you watch TV shows, programs, and/or events? – Consumes TV content seven days a week



(Source: Ipsos TV Dailies Survey, cumulative data March 2021, among 16,224 U.S. adult respondents ages 18-54 who consumed TV content seven days a week.)

Question:

Who will control the future of entertainment content and marketing?



Kai Gayoso

**Partner-digital,
Range Media Partners**



Entertainment talent and creators are increasingly writing their own tickets to fame or building their fanbases through viral online content.

That's why Kai Gayoso, partner-digital for Range Media Partners, has a client roster that includes YouTubers Dhar Mann and chef Sohla El-Waylly, alongside actors Emilia Clarke and Gabrielle Union. When Gayoso thinks **What the Future**, he sees digital creators holding more sway with fans and brands.

2x

is how much more search engines are influential in people's shopping decisions than influencers.

(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)



What most influences our shopping decisions?

Q. When thinking about your typical process of shopping and buying things, how important are each of the following sources of information in your decision making?

Search engines like Google, Yahoo! or Bing



Shopper reviews on shopping websites



Online content or reviews from people I know personally



Online videos on sites like YouTube



Advertising



Online content from people I only know through the internet
(e.g., influencers, bloggers, celebrities)



■ Very important ■ Somewhat important
■ Not very important ■ Not at all important

(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)

Kate MacArthur: In the legacy entertainment industry, talent was largely discovered by an agent or studio and then carefully cultivated in that image created by this machine. How does that compare with creator talent today?

Kai Gayoso: Everybody loves being the person to say, “I found this person first, or I saw this person at 200 followers.” Then you see this personal investment in them over time because you were there so early. We are sometimes reacting to a talent that has been able to grow an audience really, really quickly. And then we are taking signals and indicators from the market that this is someone that people want to watch and they want to be, or they want to bring them into their life.

MacArthur: How did creators control their content in the past?

Gayoso: They were just ordinary people sharing narratives and slices of their life that people would find on YouTube and be like, “Oh, I feel seen,” or “This is someone who I know I can be friends with.” They produced their own content, they edited their own content, and they had the luxury of slow growth of an audience over time to really develop what their perspective and what their brand was.

MacArthur: How would you compare that to today?

Gayoso: The biggest difference with this generation of talent is these are kids that have grown up with every major

generation of creators. All they know is fandom and star power. You also see it in the production quality. You’re seeing these hyper-produced vlogs or videos that look more like reality shows than they do traditional, digitally native content.

MacArthur: Where do you see that going in the future?

Gayoso: Right now, we’re in this hyper-sprint to be as relatable as possible. You’ll always have that top tier of talent that reaches the level where everyone in the world knows their name. But with the growth of back-end tools and the growth of monetization ecosystems, especially across the social platforms, there’s now this huge opportunity for hyper-focused vertical interests.

Who relies most on influencers?

Q. How often, if at all, do you purchase things because you saw people you follow but don't know personally (like influencers, bloggers, celebrities, etc.) using them on social media?

Net often/Sometimes



(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)

MacArthur: How do you mean?

Gayoso: It's not enough to just be trying to appeal to as many viewers as possible. The way forward is going to be: what is my own personal passion and how can I convey that to others? Let's take cooking, for example. You're going to start to see this segmentation of viewers based on what their personal interests are and less of the talent that are trying to come in and be that [famous] person.

MacArthur: How will that affect the business model in the future?

Gayoso: You have ad breaks, which is the bulk of most creators' revenue. Now you're seeing creators branch out into multiple, diversified revenue streams. Whether the story I'm telling is straight-to-camera video or an episode of my podcast or a chapter in my book, my fans are always going to hopefully want to consume that. Then also, these are very different entry points into overall fandom.

MacArthur: How will that change the relationship with the brands?

Gayoso: If you look at what's happening with [industry changes to cookie/tracking policies], advertisers moving forward are going to have a much harder time reaching their target audience and target customer by the means that they had been using for the past couple of years. Influencer marketing in that way really solves a big issue for them.

“The way forward is going to be: What is my own personal passion and how can I convey that to others?”

MacArthur: How so?

Gayoso: Their audience is built of what should be primarily the demo you're trying to hit. Working with them in a way that honestly feels authentic is the biggest way that influencer marketing has evolved over the years.

MacArthur: How will this change the relationship between creators, brands and the audience in the future?

Gayoso: What creators are really looking for these days is that creative freedom and the ability that brands will be able to trust them to know what their audience wants and that we're all working toward the same goal. But as that ecosystem starts to develop even further, how can brands come in in a way that's inherently interesting,

whether that is an episodic series or a one-time thing, or become a true presence in creators' content and lives in that it becomes almost even a character of their content.

MacArthur: Where is the balance of power over the creativity going?

It's shifting more toward the creator now more than probably ever before. They know that they can build a business via merch or via ticket sales or via any of their other diversified revenue streams, where they're completely willing to give up revenue in exchange for creating the content that they want. Going forward, brands understand what that relationship is between talent and their audience. To tap into that, they're going to have to give up a little bit of creative control.

MacArthur: Given the rising demand for diverse voices, how do you see stardom and fandom changing in the future?

Gayoso: What I love about this generation of audience is that they have the audacity to want to be or want to feel represented. There's just such a hunger to see different kinds of people on screens.

Kate MacArthur is deputy editor of What the Future and deputy editor of editorial for Ipsos in North America.

How can brands convert scrollers into shoppers in the Golden Age of social buying?



Digital buying, and more specifically, social buying, accelerated in the upheaval of 2020.

With America under lockdown, the pandemic became a moment of opportunity for both platforms and brands as consumers adapted to buying through social media.

Today, two-thirds (65%) of Americans are buying directly on or discovering products through social media, according to a recent Ipsos study. So far, apparel, beauty, health/wellness and media subscriptions are the biggest beneficiaries. Now the challenge is to scale by making social buying more reliable and convenient for even more categories.

Already, 2020 ushered in massive infrastructure changes. Major social platforms adopted and rolled out integrated commerce features. Marketers and product developers faced increased pressure to shorten the time and gap between impression and transaction or risk losing a sale. With this new infrastructure ready, the focus becomes how brands can convert more scrollers to shoppers.

The main barriers to social buying are behavioral, according to the Ipsos survey. About three in 10 consumers say they don't use social media for shopping inspiration, they prefer to buy in stores or they don't trust the product recommendations on social media. Education can go a long way to overcome these vetoes.

The good news is that audiences typically just need someone to tell them about social buying, per the Ipsos study. For 40% of consumers, the main thing that led them to make a social purchase was a recommendation by a trusted friend. However, the data also show that brands can play a role in this education. One way is working with influencers to spread the word on how customers can find your brand. Another is including a call to action to brand social commerce efforts from your brands' other marketing efforts, thereby linking and raising awareness to the brand's available social and shopping platforms.

Social commerce is here and growing. It's giving brands a new transactions platform and shortening the distance between marketing and conversion. This is important as social media evolves to be not just a channel for brand exposure but also for brand experience.

Jessica Wombles is a senior research analyst in Ipsos' Media Development service line.

What keeps people from buying on social media?

Q. What conditions might prevent you from purchasing goods or services via or after discovery on social media?

I don't typically use social media for shopping inspiration 34%

I prefer to buy in-person 32%

I don't know if I can trust the product recommendations on social media 30%

I prefer to do my shopping from one central website (i.e., Amazon, Target, Nordstrom) 25%

I try not to allow my purchases to be influenced by social media 22%

I'm not familiar with a lot of the brands showcased on social media 15%

I didn't know buying through social media was an option 6%

Other 3%

I don't think anything would prevent me from purchasing goods or services via social media 14%

(Source: Ipsos survey conducted Mar. 17-18, 2021, among 1,005 U.S. adults.)

Question:

What are the limits of virtual today and tomorrow?



Dave Meeker

**Head of design & innovation,
Americas, and global
chief innovation officer,
Dentsu Creative**

Dave Meeker is an old friend of mine. The polite thing is to say our conversation was “wide-ranging,” but it was more like disjointed pinball. We talked about far-flung ideas that seem far-fetched and yet are already starting to happen.

When he thinks **What the Future** of entertainment experiences, he is at once a skeptic: “Who would want that?!?” But he’s also techno-woke: “I don’t, but I bet someone will.” This makes him the perfect global chief innovation officer, a position he holds for agency group Dentsu Creative, as well as its head of design and innovation for the Americas. Hang on, this will be a fun ride and make sure to stay ‘til the end.

50%

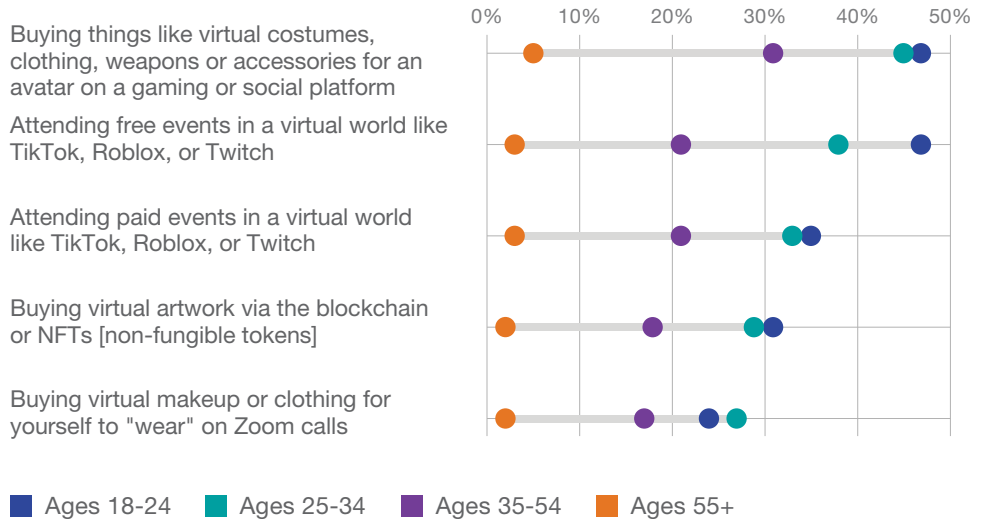
of parents with kids at home under age 12 are familiar with buying virtual gear on gaming or social platforms.

(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)



What are the growth opportunities for metaverse shopping?

Q. How familiar are you of the following activities for games or other virtual environments? (Total familiar)



(Source: Ipsos survey conducted Apr. 15-19, 2021, among 1,284 U.S. adults.)

Matt Carmichael: We're really starting to see the lines between real and virtual blur.

Dave Meeker: There's all this digital extension stuff, trying to take physical products and shopping into digital experiences that would have felt super off-brand two or three years ago. Now all this weirdness is happening. Virtual humans? The Travis Scott concert in Fortnite and tens of millions of people watched? COVID-19 has accelerated all of these ideas that people had as maybes into things that are either not working or working, but at least they're trying.

Carmichael: And it's commerce too, right?

Meeker: It's not just that the shopping environment becomes virtual, it's that the products or the product shopping experience also become virtual. I might buy the physical product, but my experience of product education happens in a game. Or I get turned on to a new fashion line through an interactive experience.

Carmichael: What are the limits?

Meeker: Some think that all of a sudden we're going to go into this totally virtual world, but the expectation is that it will feel "real" and we're not yet given "real." The technology isn't quite there. But then you take the Travis Scott concert that my kid participated in with 12.5 million other kids. They know it's not real. They don't expect real. They expect Travis Scott to look like a video game character. The music's real, they still hear their favorite songs performed live. This is kind of where we're at in terms of the content for virtual events. It's not one-kind-of-content-fits all kinds of experiences. There are degrees.

Carmichael: Spin that out a little further.

Meeker: Say I'm watching a concert on screen. I've got my phone on my little selfie stick tripod thing that a lot of these kids have. I stand up and I dance along and the phone's capturing me and putting me into the concert.

"It's not just that the shopping environment becomes virtual, it's that the products or the product shopping experience also become virtual."

“That stuff has not yet been figured out, but in 15 years, all of these things will be probably very commonplace.”

So now when I look at the concert, there’s the person on stage, but there’s all of these people really dancing to that. And it’s all synched. Say I want to get closer to the stage? It’s another \$3. That becomes a monetization model around how much of the experience the viewer controls. How much do you get to take to your social media channels? Can you get onstage with the performer? Did you pay \$1,000 to be on stage for two minutes? I wouldn’t, but I’ll bet you there are people who would. Then you can post that on Instagram or TikTok and now you’re famous because you were on stage in the virtual event.

Carmichael: And, of course, there would be merch.

Meeker: Once you get to the virtual event, you can pick one of three T-shirts or you get other physical things sent to you. These digital/physical tie-ins are really interesting. And maybe you can mix and match your own camera angles. So I want to look at things from the drummer’s perspective or have a first-person view of the singer looking out at the audience. I buy that as part of my ticket package. Or bands could offer sponsored experiences where a regular person gets to watch the thing you get to participate in. That’s where the future lies. 2018, 2019 created the opportunity. 2020 created a necessity.

Carmichael: The Rolling Stones could really keep rolling like this.

Meeker: If you could capture the Rolling Stones in volumetric video on a big stage with a live concert — and the technology is getting that good — do they ever need to play another concert ever again? You could get to the point where the band gets together in a studio and does “backstage live” interactions with people, but you’re not really looking at them, you’re looking at the meta-human version of them. I don’t want that experience, but I’m not 13. Right?

Carmichael: How does all this technology work for other products?

Meeker: I need to fix my washing machine. I don’t know how to fix my washing machine. Well, don’t perform surgery on your washing machine. Perform surgery on the virtual version of your washing machine, right? That’s a weird example, but think of something like [the kids’ show] “Paw Patrol.” Say you want to be part of it. All right, come over here, pop your head in. And now

your world is a “Paw Patrol” world because of virtual reality, 3D content, cameras on the devices, all powered by an AI [artificial intelligence] cloud. That stuff has not yet been figured out, but in 15 years, all of these things will be probably very commonplace.

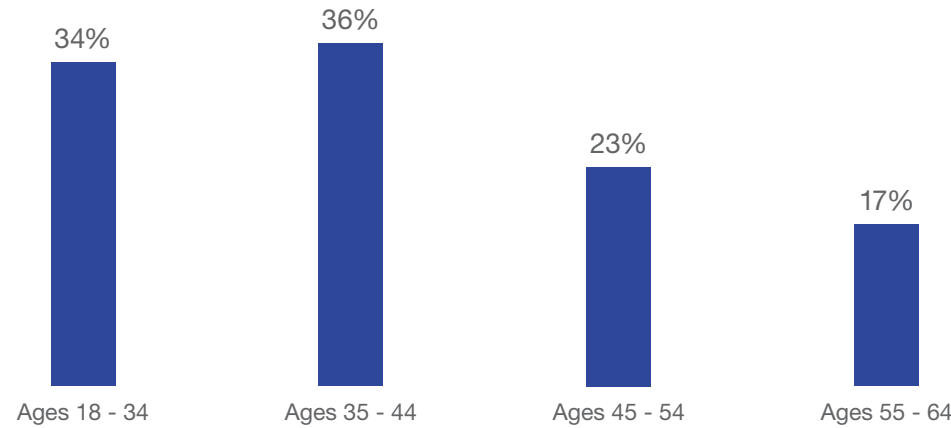
Carmichael: So what do the next five years look like?

Meeker: It’s all on the table. We’re going to see fully virtual concerts that sell tickets for \$500 where you have a one-on-one with Lady Gaga before the show. And none of it ever really happened, but it did, and you know that it was totally fake. That was not really Lady Gaga, it was a PR person pretending to be her with a virtual human. But then there’s the kicker. Look at Texas recently. What happens when all the power goes out? What’s the backup plan? We don’t have one.

Matt Carmichael is the editor of What the Future and VP of Editorial strategy for Ipsos North America.

Who would engage with brands in the metaverse?

Q. There has been a lot of talk lately about virtual environments. Would you want to interact with a brand in a virtual world? (% Yes)



(Source: Ipsos US Syndicated Online Community, fielded Apr. 8-12, 2021, among 1,043 adults.)

How can brands put virtual measurement in a real-world context?

In a typical year, half of adults attend a visual or performing arts activity at least once, according to the National Endowment for the Arts.

Looking ahead to the summer of 2021, fewer than half of Americans on average say they'll likely attend such performances, according to a recent Ipsos Coronavirus Consumer Tracker. Younger adults skew higher. Like most things, COVID-19 dramatically changed how we experience performance, shifting many to seek out virtual events and live streams over the past year. For performers, platforms and brands, it's valuable and gratifying to gauge how many fans are out there and how they're engaging in these rapidly growing platforms.

But how do you measure and put a virtual audience into context?

Virtual performances can sell tickets in the form of unique links to an event, providing one measure of audience size. However, many events are free, open to the public or are part of a membership or subscription. In those cases, we need to be more inventive to estimate a richer set of demographics and linkage to other behavior. One way is passive digital monitoring.

Ipsos' Behavioral Data Group uses the LIFE Path approach that combines survey data with passive audience measurement techniques to deliver fast, accurate information

about respondents' digital journeys. The research collects information on the types of content and advertising that respondents consume on a daily or weekly basis. Working through panel partners, respondents can download applications that turn their smartphones and PCs into powerful meters that can even capture their exposure to broadcast content, including virtual performances.

Even those with their own platforms need to understand how to reach their customers outside of those platforms. Beyond virtual audience size, collected data also reveal the digital pathways that audience members followed in securing their virtual tickets, including how long they were in the consideration phase. It can highlight key moments during the research and buying stages, as well

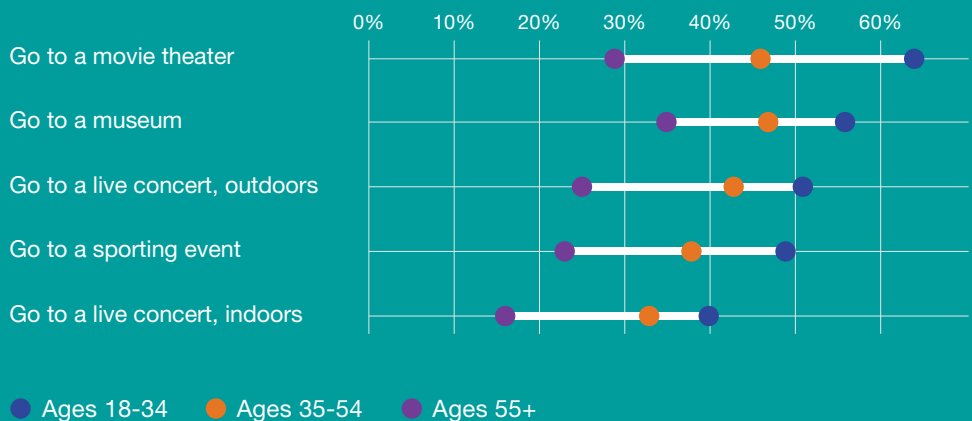
as point to the differences in time spent across different digital properties.

Such analyses enable entertainers and brands to better understand who and how committed their audience is, and what commonalities exist beyond the love for the performers. As virtual entertainment gains relevance and popularity, talent, promoters and brands will require more insights on where to advertise, what merchandise will sell best, and conceivably what content will make the audience happiest. By measuring multiple touch points, creators and talent can forge even stronger bonds to their audiences.

Tony Incalcaterra is a senior vice president in Ipsos' Media Development service line.

Who is most likely to attend live events this summer?

Q. Thinking ahead to this summer (2021), how likely, if at all, are you to do each of the following? (Net likely)



(Source: Ipsos survey conducted Apr. 27-28, 2021, among 1,115 U.S. adults.)

Question:

Will the metaverse be the next Madison & Vine?



Christina Wootton

**VP, Brand partnerships,
Roblox**

Entertainment and commerce have always gone hand-in-hand in the real world. So why wouldn't they do likewise in the metaverse of virtual worlds like Roblox?

Roblox is a game, a place to see virtual concerts and events and an entire virtual community and economy in one. And Christina Wootton manages the brand partnerships. When she thinks **What the Future**, she's looking at how brands can bring commerce to the community.

34%

of U.S. adults ages 25 to 34 would want to interact with a brand in a virtual world.

(Source: Ipsos US Syndicated Online Community, fielded Apr. 8-12, 2021, among 1,043 adults.)



“Brands are realizing that they definitely need a persistent presence in the metaverse.”

Matt Carmichael: The company has described itself as a human co-experience platform that will eventually support these experiences in the entertainment, learning and business markets. How do you envision the role of the entertainment components in that evolution?

Christina Wootton: Roblox is an entertainment platform. We have millions of immersive original creative experiences, and they're already engaging with entertainment brands. For instance, we've seen Warner Bros. partner directly with one of our top developer studios for the game "Adopt Me" and integrate "Scoob!" into the game for their release of the movie.

Carmichael: Who takes the lead in the brand partnerships?

Wootton: Our team has been working with strategic partners, and we talk about their objectives, connecting them, if needed, with our developer community because they know what's going to resonate well with our audience and what's authentic. But we love seeing that this organically is happening, that brands are coming on board and reaching out to developer studios, sometimes without us even knowing.

Carmichael: Obviously, there's platform reputation that you have to be considering as well with these relationships. So how does that all balance and work?

Wootton: We're creating a self-sustaining ecosystem so that we will provide the tools to our developer community and see what they do with them. But to launch that, we make sure we establish a framework of how you should use those tools. At the same time, our developer studios are also showing us what they can do. We get to see what they do, how they take the tools and how they actually make it even better.

Carmichael: The idea of the metaverse is expanding around Roblox. It was a much less crowded space when you launched in 2004. How does that change the role both for you, but also for just brands and entertainment?

Wootton: As the global audience gets larger and more time is spent in the metaverse, brands are realizing that they definitely need a persistent presence in the metaverse. It's all a learning process, but brands are definitely interested more and more in getting into this space.

Carmichael: Does this become a direct retail channel of sorts? Is there opportunity to create essentially a mirror economy in the metaverse?

Wootton: We've had Gucci and Stella McCartney come onto our platform and create virtual items based on their real-world merchandise. They do want to still have that scarcity, and replicate what's going on in the real world. The fashion brands are very interested in how they can blur the physical and digital worlds.

Carmichael: How are brand partnerships different in a metaverse than they are in the "real verse"?

Wootton: Sometimes it's similar, but I think the important thing is that brands need to be aware that in the metaverse, just because you have that really amazing IP [intellectual property] in the real world doesn't mean that you could just create an experience and expect that IP to automatically be popular and resonate. You really have to understand the community and create experiences that are authentic.

Carmichael: You mentioned that sometimes brands have preconceived notions of how they want to replicate their real-world experience in the metaverse. How do you get them to loosen those constraints and explore new possibilities?

Wootton: The more we work with our partners, we build that trust to say, “We want to show you some examples of what works well on our platform.” It’s a slow process because a lot of IP holders are sensitive to how their IP is portrayed in another space. And you’ll see that developers create interesting artworks that aren’t what you’re used to seeing from a “professional” brand advertising banner. But the click-through rates are really high because the platform is built for other users.

Carmichael: As market researchers, the idea of doing research in these virtual spaces to support the brand experiences is evolving. How do you see research in this world?

Wootton: With the metaverse, you can do a lot of testing and get real-time feedback, especially with fashion and retail. There are so many resources and so much money spent on creating products that you don’t really know yet how that’s going to be received by your consumers and fans. You can actually test that out virtually. You can create a virtual shoe and get feedback from the users on which outfits they are adopting first. Maybe the users are even helping with the design process.

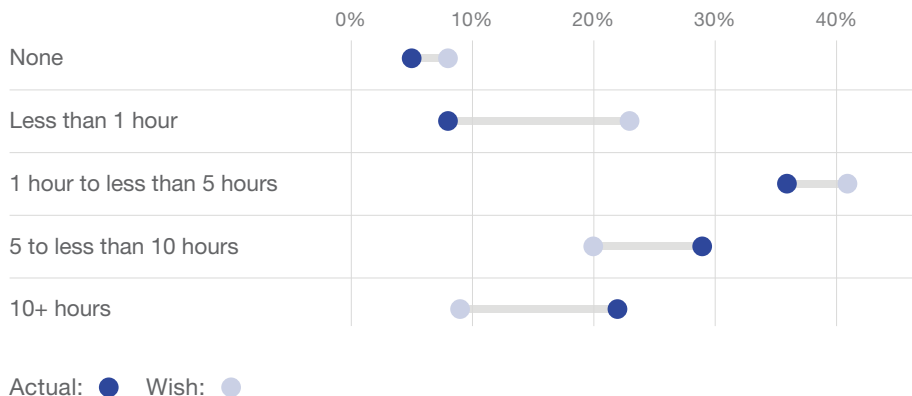
Carmichael: When you’re working with brands, with whom do you work within the organization? Are brands starting to have specialists in brand metaverse extension? Is it an R&D function? Is it like, “Oh, we’ve got this 20-year-old who...”

Wootton: Sometimes we’re working with the marketing team, sometimes it’s the interactive team or the licensing team. But we have seen, which is really, really amazing to us, that a lot of our partners are starting to talk about building out internal teams to help them bring their brand to the metaverse. Just as when companies were building social media teams, you wouldn’t launch a social media channel and never post anything.

Matt Carmichael is the editor of *What the Future* and VP of Editorial strategy for Ipsos North America.

Are kids getting more screen time than their parents want?

Q. On average, how many hours does your child spend per week/How much time do you wish your child would spend per week doing the following activities in their free time (outside of school, chores, or other family obligations) when allowed? – Screen time, for entertainment

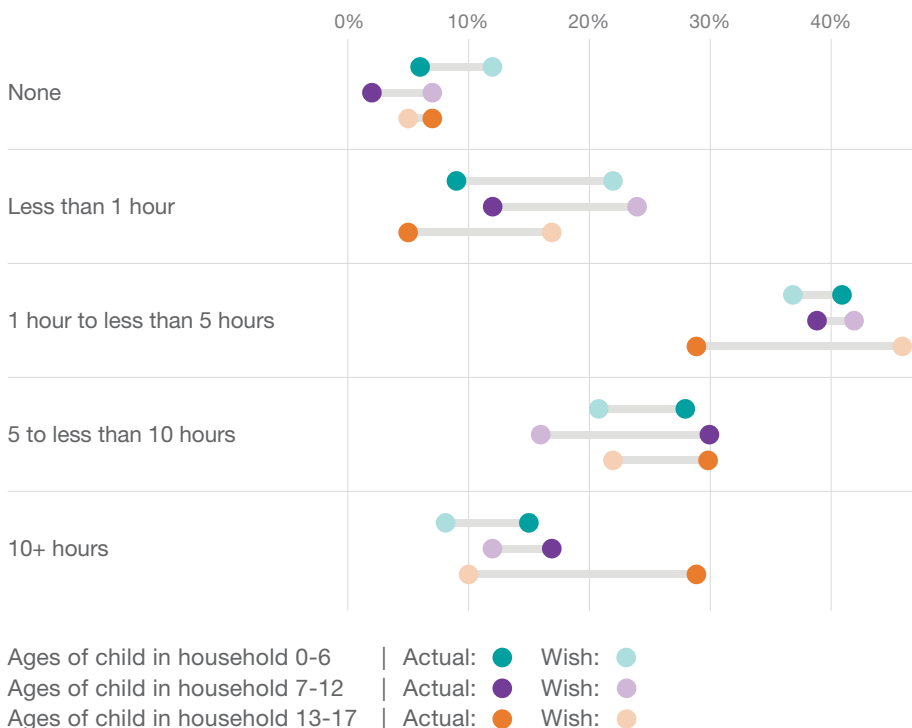


(Source: Ipsos survey conducted Apr. 15-19, 2021, among 325 parents with children in the household.)

“With the metaverse, you can do a lot of testing and get real-time feedback.”

For which age is the reality gap the largest?

Q. On average, how many hours does your child spend per week/How much time do you wish your child would spend per week doing the following activities in their free time (outside of school, chores, or other family obligations) when allowed? – Screen time, for entertainment



(Source: Ipsos survey conducted Apr. 15-19, 2021, among 325 parents with children in the household.)

How will we research in virtual spaces?

Imagine a world where information, social connection and purchases are not constrained by physical location. Oh, wait — this is already possible today.

The “future” of tomorrow is here now, including in virtual spaces through augmented reality (AR) and virtual reality (VR) and virtual realms like Minecraft and Roblox and VR game Beat Saber. Already, 45% of U.S. adults say they’re likely to buy virtual or real products they see or create in virtual worlds, according to a recent Ipsos online community survey.

We’re using these technologies to take research to the next level. Researching in these virtual worlds is the next frontier. Brands that embrace this now will be better prepared to compete in the future. When we think about how to research in VR/AR spaces, the question isn’t, “Is this possible?” The question is, “How should we start?”

First, let’s do some level setting. VR/AR tech cannot fully replace physical, real-world research. However, VR/AR supplements and supports the research cycle. A smart place to start is from the very beginning — concepting, exploratory research and discovery. It can be costly to produce a physical prototype at an early stage when there are many unanswered questions — especially when so much of the design could change depending on consumer or user

feedback. Research in VR/AR allows for continued iteration and refinement during that early part of the product or marketing cycle.

Then, to keep an eye on the budget, instead of mocking up a physical prototype and renting out a lab, you recreate a digital, 3D version of the product concept. You can place it in a simulated, realistic environment that can be accessed through desktop computer, mobile device or a VR or AR headset.

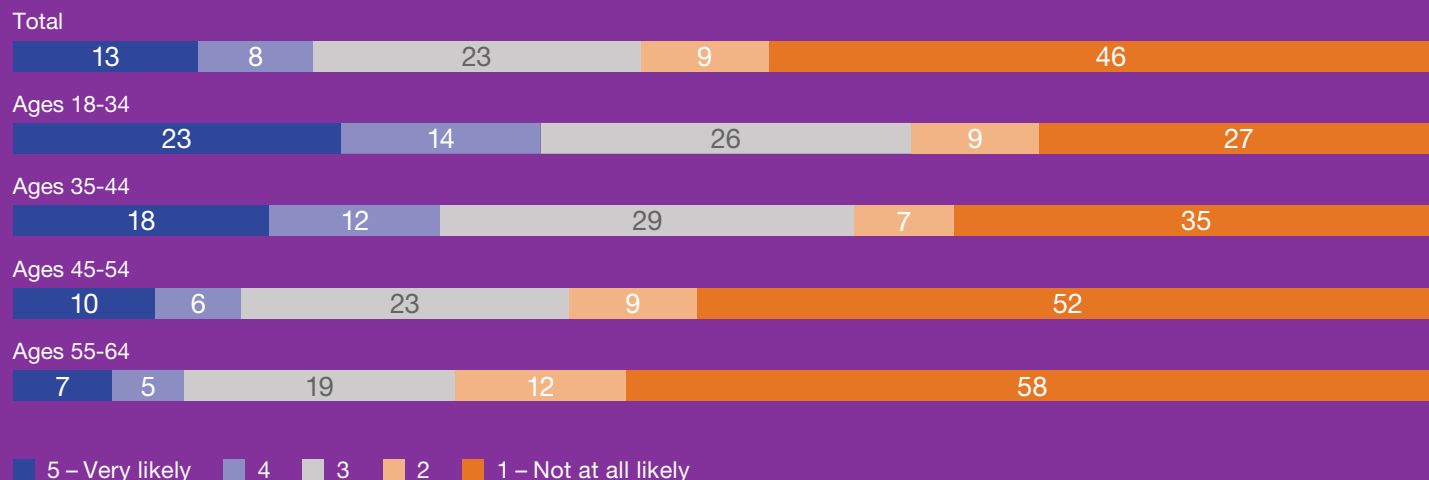
Next, you can lock down your test product(s) with a password and “ship” it to anyone with a secure link and grant temporary access. Since your product lives in a secure cloud server, you can still access it, update it, create multiple versions and test your product with real consumers all over the world.

Virtual testing is already happening — we can better leverage the technology to bring it to the environments where people and products are going.

Katelyn Faulks is a senior UX researcher in Ipsos’ User Experience service line.

Are virtual worlds good places to get product inspiration?

Q. How likely would you say you are to buy virtual or real products based on concepts or ideas that you create or see in a virtual world?



(Source: Ipsos US Syndicated Online Community, fielded Apr. 8-12, 2021, among 1,043 online adults.)

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GAME CHANGERS

