HOW THE WORLD SEES THE METAVERSE AND EXTENDED REALITY

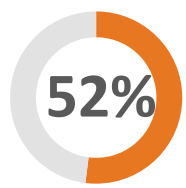A 29-country Global Advisor survey

May 2022

GAME CHANGERS

SUMMARY OF FINDINGS

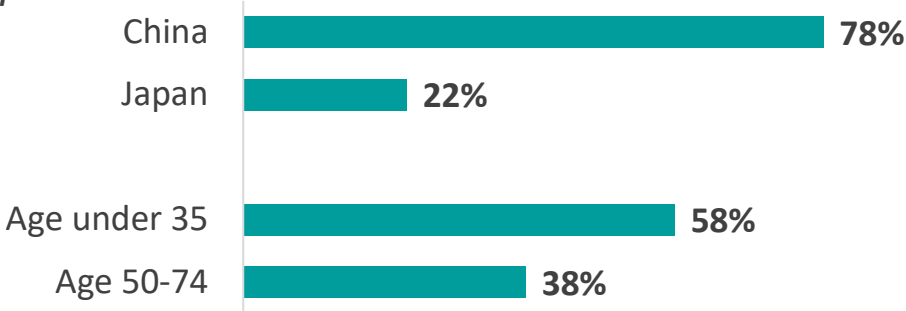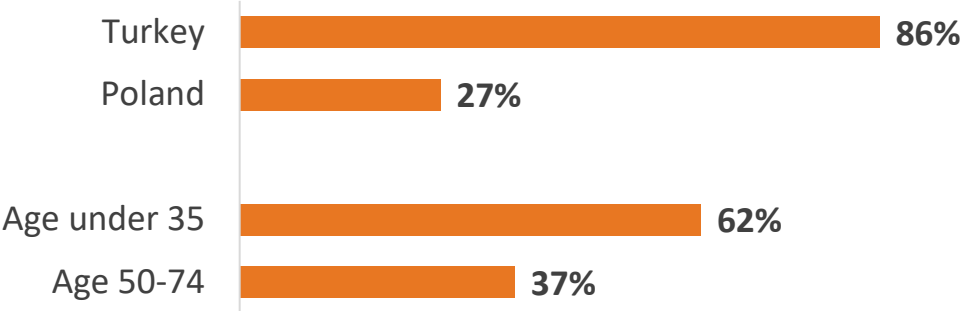On average across 29 countries...

52% say they are familiar with the metaverse (44% in Aus)
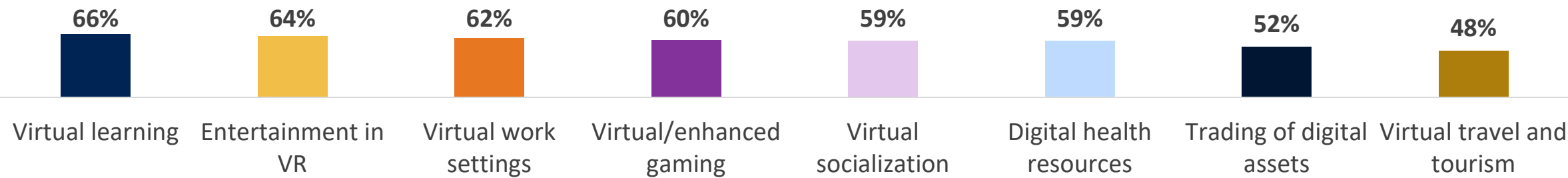
50% have positive feelings about engaging with XR in daily life (36% in Aus)

but familiarity and favourability vary widely across countries and demographic groups:

Turkey	86%
Poland	27%
Age under 35	62%
Age 50-74	37%

China	78%
Japan	22%
Age under 35	58%
Age 50-74	38%

Between half and two-thirds expect various types of metaverse apps using XR to significantly change people's lives in the next 10 years

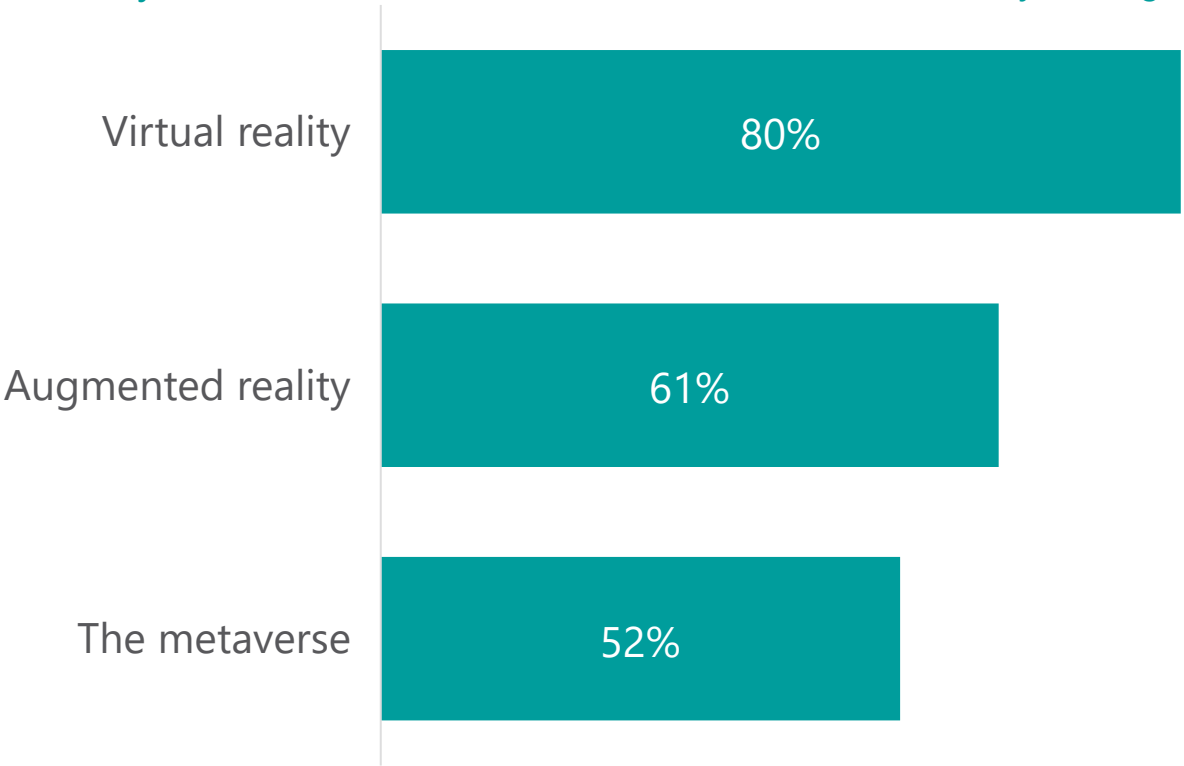| Virtual learning	Entertainment in VR	Virtual work settings	Virtual/enhanced gaming	Virtual socialization	Digital health resources	Trading of digital assets	Virtual travel and tourism
66%	64%	62%	60%	59%	59%	52%	48%

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FAMILIARITY ACROSS THE WORLD

Q. How familiar are you with each of these concepts?

% very/somewhat familiar

29-country average

Highest in:

Lowest in:

	29-country average	Highest in:	Lowest in:
Virtual reality	80%	Turkey (94%), Hungary/Peru/Poland (93%)	France (46%), Germany (47%), Switzerland (57%)
Augmented reality	61%	Turkey (84%), Peru (82%), Colombia/India (79%)	Belgium (36%), France/Germany (38%)
The metaverse	52%	Turkey (86%), India (80%), China (73%)	Poland (27%), France (28%), Belgium/Germany (30%)

FAMILIARITY BY COUNTRY

Q. How familiar are you with each of these concepts?

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	Colombia	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Switzerland	Turkey	United States
Virtual reality	80%	88%	80%	64%	84%	74%	89%	88%	92%	46%	47%	73%	93%	89%	84%	67%	73%	85%	75%	93%	93%	86%	77%	87%	77%	85%	82%	57%	94%	86%
Augmented reality	61%	68%	51%	36%	73%	43%	71%	73%	79%	38%	38%	52%	75%	79%	66%	43%	49%	74%	41%	82%	67%	75%	63%	51%	70%	77%	55%	46%	84%	63%
The metaverse	52%	51%	44%	30%	63%	37%	44%	73%	63%	28%	30%	45%	51%	80%	58%	46%	54%	61%	31%	62%	27%	60%	58%	51%	71%	63%	38%	35%	86%	59%

FAMILIARITY ACROSS DEMOS

29-country average
% very/somewhat familiar
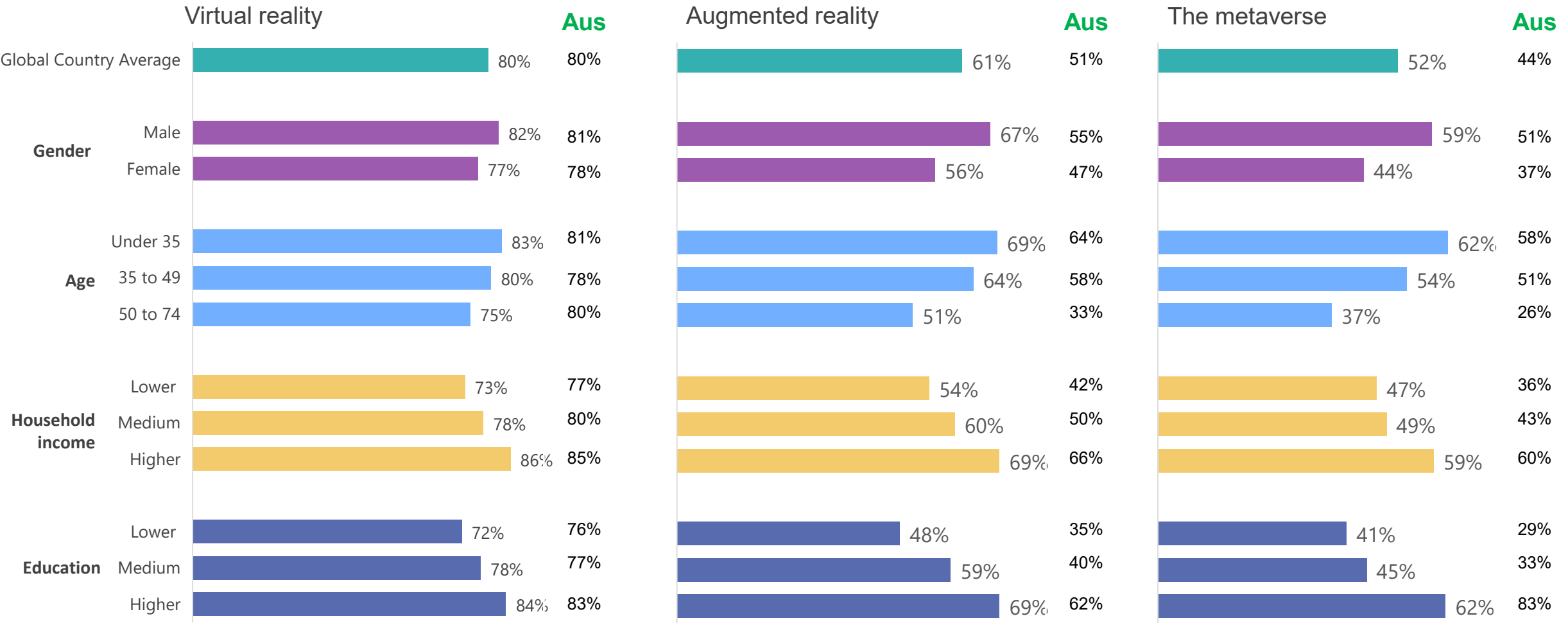
Q. How familiar are you with each of these concepts?

Virtual reality

		Aus
Global Country Average	80%	80%
Gender		
Male	82%	81%
Female	77%	78%
Age		
Under 35	83%	81%
35 to 49	80%	78%
50 to 74	75%	80%
Household income		
Lower	73%	77%
Medium	78%	80%
Higher	86%	85%
Education		
Lower	72%	76%
Medium	78%	77%
Higher	84%	83%

Augmented reality

		Aus
Global Country Average	61%	51%
Male	67%	55%
Female	56%	47%
Under 35	69%	64%
35 to 49	64%	58%
50 to 74	51%	33%
Lower	54%	42%
Medium	60%	50%
Higher	69%	66%
Lower	48%	35%
Medium	59%	40%
Higher	69%	62%

The metaverse

		Aus
Global Country Average	52%	44%
Male	59%	51%
Female	44%	37%
Under 35	62%	58%
35 to 49	54%	51%
50 to 74	37%	26%
Lower	47%	36%
Medium	49%	43%
Higher	59%	60%
Lower	41%	29%
Medium	45%	33%
Higher	62%	83%

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OPINION OF EXTENDED REALITY

Q. Virtual reality and augmented reality are forms of extended reality (XR). How would you describe your feelings about the possibility of engaging with it in your daily life?

% very/somewhat positive

DE 31% SE 40%
NL 35%
BE 30%
GB 26%
FR 31%
ES 43%
CA 30%
US 42%
PL 51%
HU 39%
TR 63%
CH 40% IT 46%
CN 78%
JP 22%
KR 63%
MX 65%
SA 71%
MY 51%
CO 67%
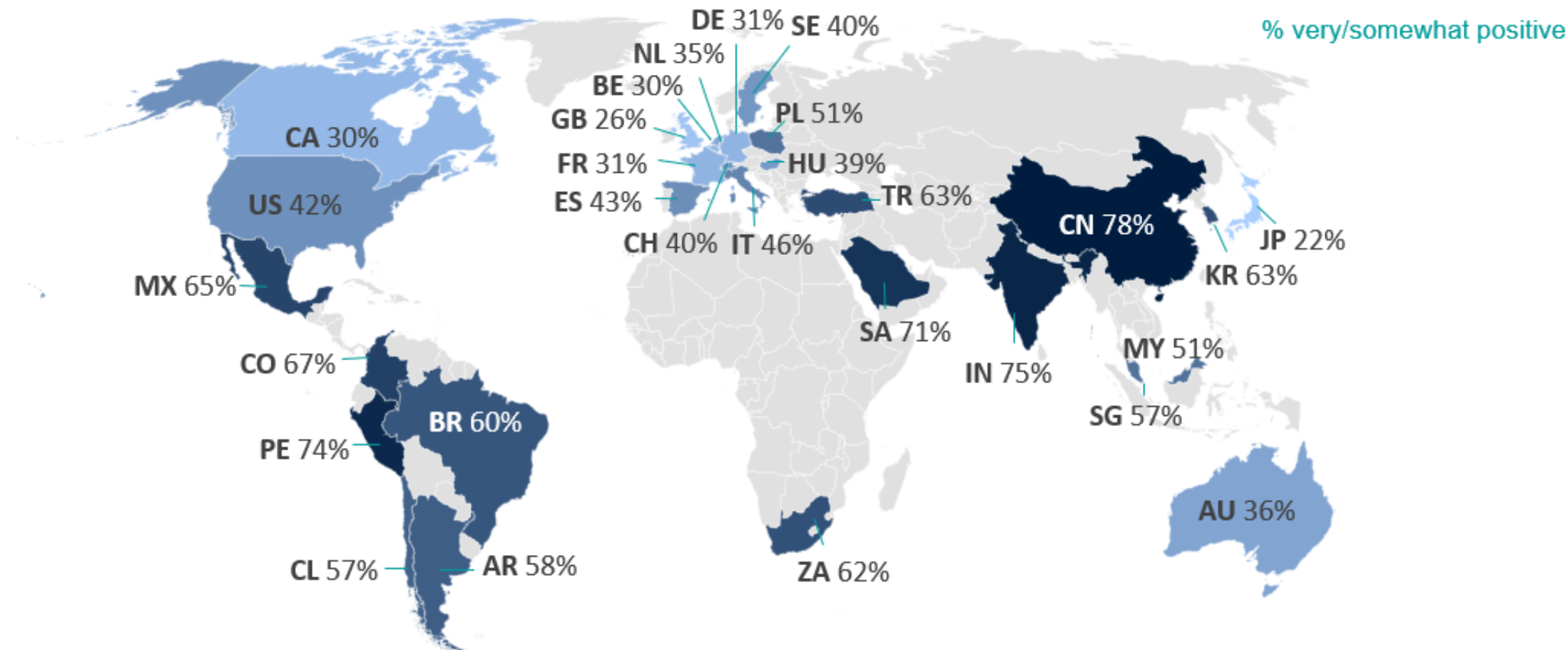IN 75%
SG 57%
BR 60%
PE 74%
AU 36%
CL 57% AR 58%
ZA 62%

Base: 21,005 online adults under the age of 75 across 29 countries, interviewed April 22-May 6, 2022
The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It
has not been adjusted to the population size of each country or market and is not intended to suggest a total result.
The samples in Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Peru, Saudi Arabia, Singapore, South Africa, and
Turkey are more urban, more educated, and/or more affluent than the general population.

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OPINION OF EXTENDED REALITY

% very/somewhat positive

Q. Virtual reality and augmented reality are forms of extended reality (XR). How would you describe your feelings about the possibility of engaging with it in your daily life?

Aus

Country	%
Global Country Average	50%
China	78%
India	75%
Peru	74%
Saudi Arabia	71%
Colombia	67%
Mexico	65%
Turkey	63%
South Korea	63%
South Africa	62%
Brazil	60%
Argentina	58%
Singapore	57%
Chile	57%
Malaysia	51%
Poland	51%
Italy	46%
Spain	43%
United States	42%
Sweden	40%
Switzerland	40%
Hungary	39%
Australia	36%
Netherlands	35%
France	31%
Germany	31%
Belgium	30%
Canada	30%
Great Britain	26%
Japan	22%

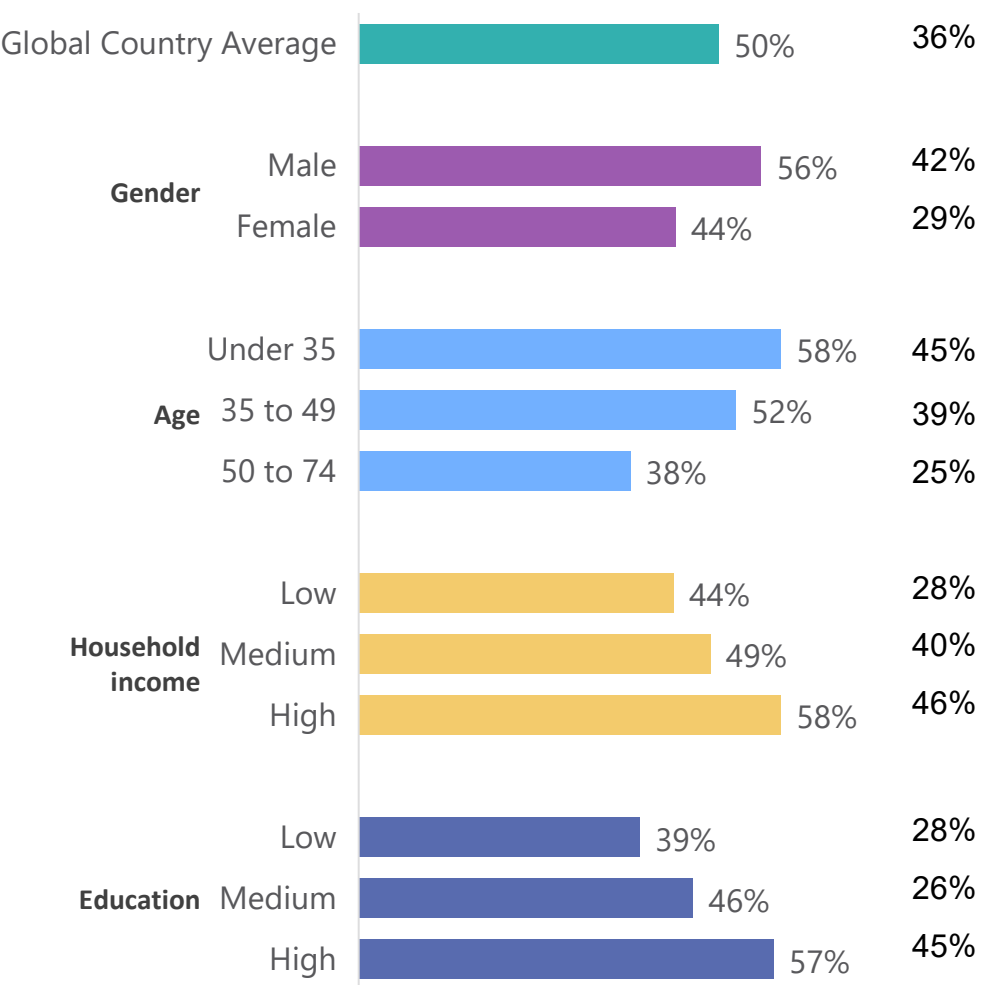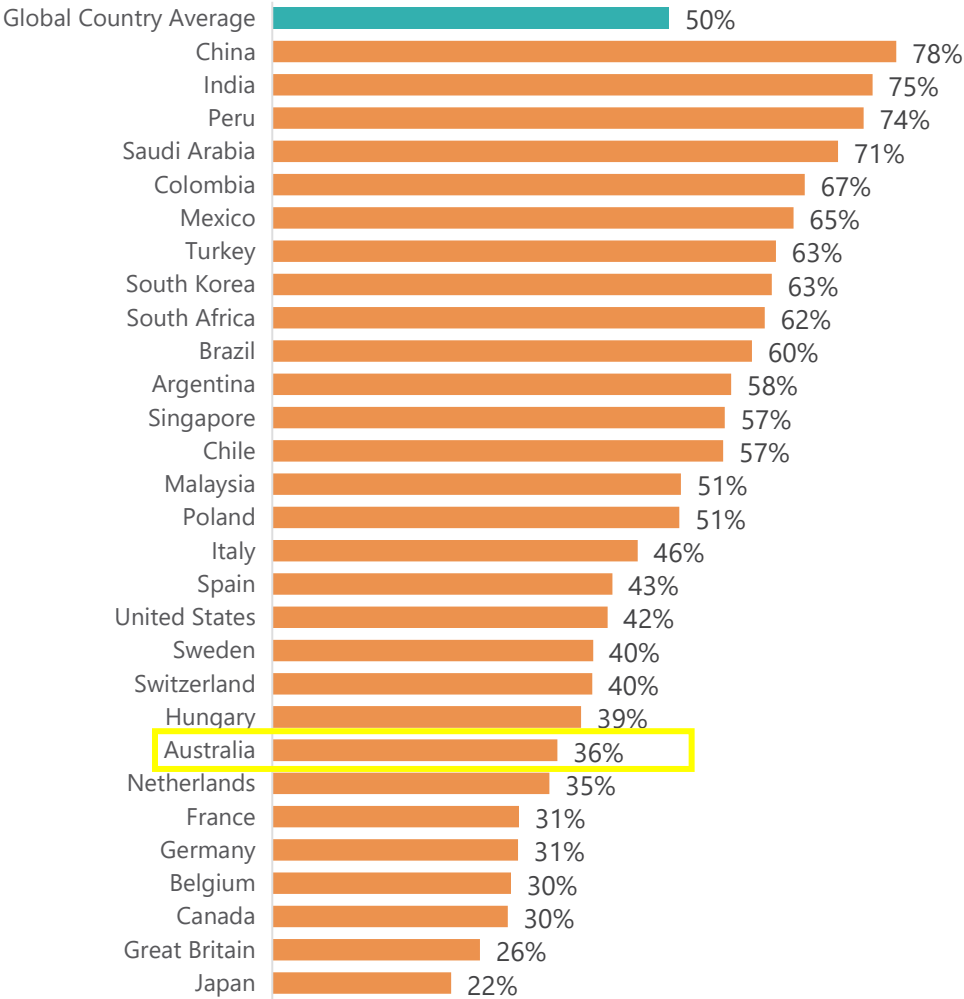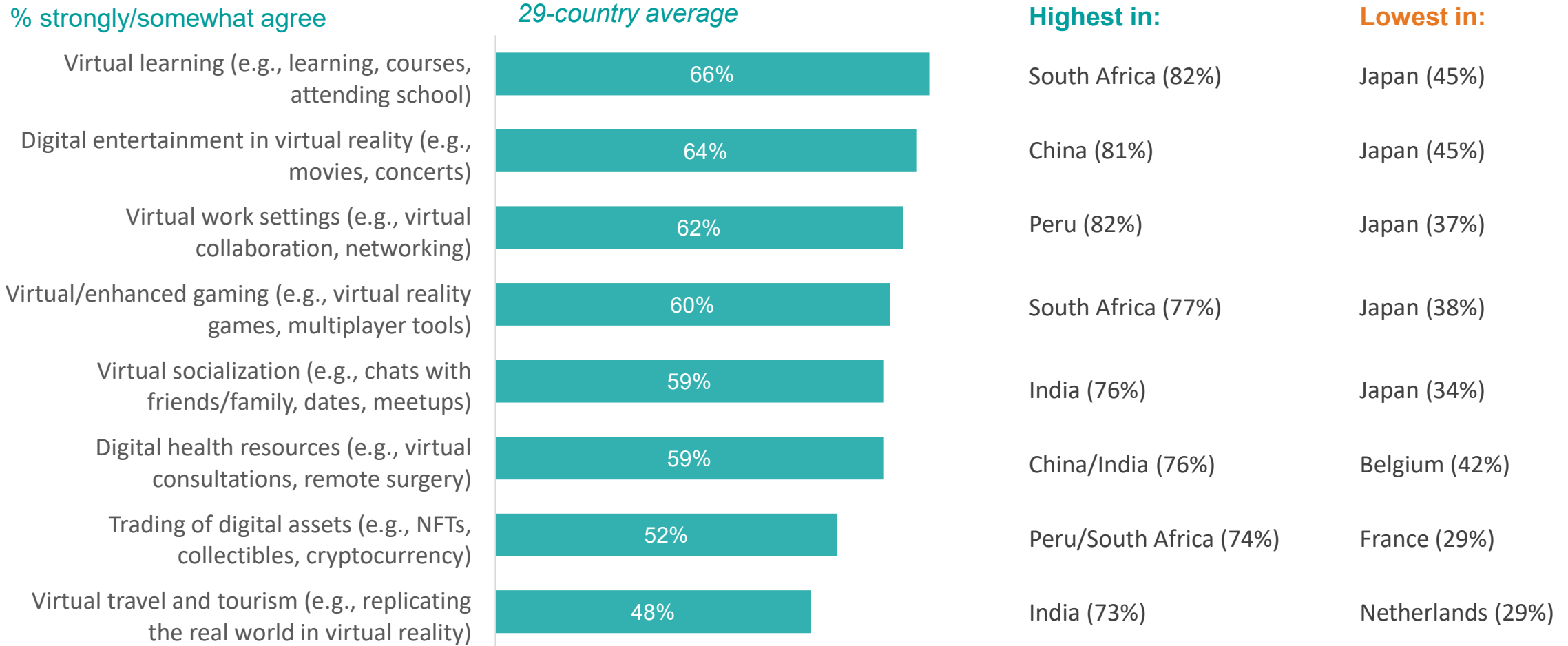|			Aus
	Global Country Average	50%	36%
Gender	Male	56%	42%
	Female	44%	29%
Age	Under 35	58%	45%
	35 to 49	52%	39%
	50 to 74	38%	25%
Household income	Low	44%	28%
	Medium	49%	40%
	High	58%	46%
Education	Low	39%	28%
	Medium	46%	26%
	High	57%	45%

Base: 21,005 online adults under the age of 75 across 29 countries, interviewed April 22-May 6, 2022
The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.
The samples in Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Peru, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

HOW METAVERSE APPLICATIONS WILL IMPACT PEOPLE'S LIVES

Q. How much do you agree or disagree that, over the next 10 years, the development of the following metaverse applications using extended reality will significantly change the way people live?

% strongly/somewhat agree	29-country average	Highest in:	Lowest in:
Virtual learning (e.g., learning, courses, attending school)	66%	South Africa (82%)	Japan (45%)
Digital entertainment in virtual reality (e.g., movies, concerts)	64%	China (81%)	Japan (45%)
Virtual work settings (e.g., virtual collaboration, networking)	62%	Peru (82%)	Japan (37%)
Virtual/enhanced gaming (e.g., virtual reality games, multiplayer tools)	60%	South Africa (77%)	Japan (38%)
Virtual socialization (e.g., chats with friends/family, dates, meetups)	59%	India (76%)	Japan (34%)
Digital health resources (e.g., virtual consultations, remote surgery)	59%	China/India (76%)	Belgium (42%)
Trading of digital assets (e.g., NFTs, collectibles, cryptocurrency)	52%	Peru/South Africa (74%)	France (29%)
Virtual travel and tourism (e.g., replicating the real world in virtual reality)	48%	India (73%)	Netherlands (29%)

Base: 21,005 online adults under the age of 75 across 29 countries, interviewed April 22-May 6, 2022
The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.
The samples in Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Peru, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

EXPECTED METAVERSE APPLICATIONS' IMPACT BY COUNTRY

Q. How much do you agree or disagree that, over the next 10 years, the development of the following metaverse applications using extended reality will significantly change the way people live?

% Strongly/somewhat agree

	Virtual learning (e.g., learning, courses, attending school)	Digital entertainment in virtual reality (e.g., movies, concerts)	Virtual work settings (e.g., virtual collaboration, networking)	Virtual/enhanced gaming (e.g., virtual reality games, multiplayer tools)	Virtual socialization (e.g., chats with friends/family, dates, meetups)	Digital health resources (e.g., virtual consultations, remote surgery)	Trading of digital assets (e.g., NFTs, collectibles, cryptocurrency)	Virtual travel and tourism (e.g., replicating the real world in virtual reality)
Global Country Average	66%	64%	62%	60%	59%	59%	52%	48%
Argentina	77%	79%	78%	69%	68%	67%	67%	49%
Australia	65%	60%	58%	56%	59%	61%	48%	44%
Belgium	55%	51%	44%	49%	45%	42%	37%	34%
Brazil	71%	73%	73%	71%	70%	67%	63%	54%
Canada	59%	54%	53%	53%	53%	52%	41%	38%
Chile	74%	72%	75%	63%	68%	69%	59%	53%
China	78%	81%	71%	72%	73%	76%	65%	67%
Colombia	80%	76%	80%	71%	73%	67%	69%	50%
France	46%	49%	41%	44%	39%	46%	29%	37%
Germany	51%	46%	46%	43%	44%	47%	36%	33%
Great Britain	53%	45%	46%	45%	45%	46%	30%	31%
Hungary	62%	62%	58%	57%	56%	47%	50%	43%
India	73%	72%	76%	71%	76%	76%	72%	73%
Italy	60%	55%	54%	49%	49%	56%	38%	43%
Japan	45%	45%	37%	38%	34%	45%	30%	35%
Malaysia	61%	57%	54%	56%	60%	56%	54%	50%
Mexico	75%	75%	74%	66%	66%	68%	65%	53%
Netherlands	56%	54%	48%	50%	40%	48%	32%	29%
Peru	78%	78%	82%	72%	75%	72%	74%	61%
Poland	62%	61%	57%	60%	58%	50%	57%	45%
Saudi Arabia	69%	67%	68%	64%	67%	63%	59%	61%
Singapore	72%	69%	73%	69%	69%	68%	61%	61%
South Africa	82%	78%	76%	77%	74%	69%	74%	66%
South Korea	73%	72%	68%	69%	55%	66%	59%	59%
Spain	63%	61%	55%	57%	54%	54%	45%	48%
Sweden	65%	61%	54%	54%	59%	54%	42%	32%
Switzerland	57%	50%	52%	52%	51%	50%	47%	34%
Turkey	71%	72%	68%	70%	66%	62%	69%	60%
United States	69%	65%	66%	63%	64%	61%	49%	50%

Base: 21,005 online adults under the age of 75 across 29 countries, interviewed April 22-May 6, 2022
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The samples in Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Peru, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

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EXPECTED METAVERSE APPLICATIONS' IMPACT BY DEMOS

Q. How much do you agree or disagree that, over the next 10 years, the development of the following metaverse applications using extended reality will significantly change the way people live?

% Strongly/somewhat agree

		Virtual learning (e.g., learning, courses, attending school)	Digital entertainment in virtual reality (e.g., movies, concerts)	Virtual work settings (e.g., virtual collaboration, networking)	Virtual/enhanced gaming (e.g., virtual reality games, multiplayer tools)	Virtual socialization (e.g., chats with friends/family, dates, meetups)	Digital health resources (e.g., virtual consultations, remote surgery)	Trading of digital assets (e.g., NFTs, collectibles, cryptocurrency)	Virtual travel and tourism (e.g., replicating the real world in virtual reality)
	Global Country Average	66%	64%	62%	60%	59%	59%	52%	48%
Gender	Male	67%	66%	63%	63%	61%	62%	55%	51%
	Female	64%	61%	60%	57%	57%	56%	50%	45%
Age	Under 35	66%	66%	64%	65%	62%	60%	58%	53%
	35 to 49	67%	65%	63%	62%	60%	60%	55%	49%
	50 to 74	63%	60%	57%	51%	54%	57%	44%	41%
Household Income	Lower	60%	56%	56%	53%	54%	53%	46%	45%
	Medium	65%	62%	61%	58%	58%	58%	51%	48%
	Higher	72%	71%	68%	67%	65%	66%	60%	53%
Education	Lower	58%	55%	51%	52%	52%	49%	44%	41%
	Medium	63%	61%	60%	57%	57%	56%	50%	45%
	Higher	71%	69%	68%	65%	63%	65%	59%	53%

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Methodology

These are the findings of a 29-country Ipsos survey conducted April 22 – May 6, 2022, among 21,005 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, 21-74 in Singapore, and 16-74 in 23 other countries, via Ipsos's Global Advisor online survey platform.

Each country's sample consists of ca. 1,000 individuals in each of Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the U.S. and ca. 500 individuals in each of Argentina, Belgium, Chile, Colombia, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Saudi Arabia, Singapore, South Africa, South Korea, Sweden, Switzerland, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Peru, Saudi Arabia, Singapore, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

The Global average reflects the average result of all the countries and markets where the survey was conducted that year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.8 percentage points and of 500 accurate to +/- 5.4 percentage points. For more information on Ipsos's use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

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"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.