

# WHAT METAVERSE USERS WANT

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- Ipsos UX -



# Who we are: Ipsos UX



**Katelyn Faulks**

Senior UXR | Dual B.A.  
Anthropology & Media Studies

- Emerging Consumer Tech, XR (AR/VR), Metaverse, IoT
- XR Moderator & Trainer
- Leads Ipsos UX XR Initiative
- Addtl expertise in privacy & HCI



**Jason Rogers**

Senior UXR | PhD Psychology

- Consumer Tech, XR (AR/VR), Metaverse, and MedTech
- XR Moderator and Trainer
- Addtl expertise in human sensory & attention mechanisms, human factors, and statistics

# Our Outline



Defining Extended Reality & Metaverse

-

Scenario



Background & Impact of COVID-19

-

Who we spoke to & why



Standout VR & virtual world experiences

-

Opportunities to improve the UX for immersive experiences



6 Key Takeaways

-

Q&A

Discussion

-

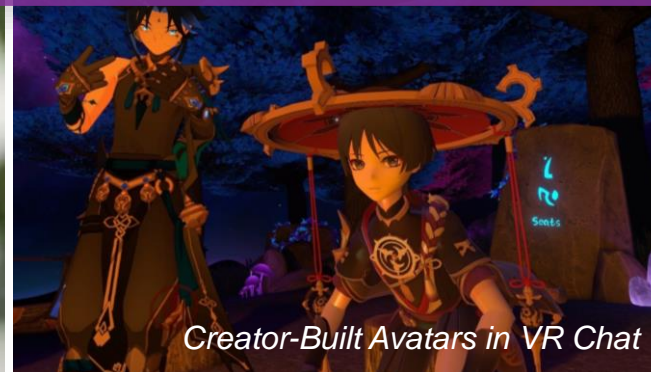
Appendix:  
What is Ipsos UX?

# EXTENDED REALITY & METAVERSE

*Definitions*

# 1

# People who use virtual reality are can access virtual worlds, build an identity, play games, and attend events.



Creator-Built Avatars in VR Chat



Roblox Avatars



VR Chat Art Museum



Decentraland World



Metaverse Fashion Week in Decentraland



horizon Venues for events/socializing



# Augmented reality experiences are used on legacy devices – like phones.



**Mixed-reality is a middle-ground – it augments reality yet provides more interaction with digital overlays.**



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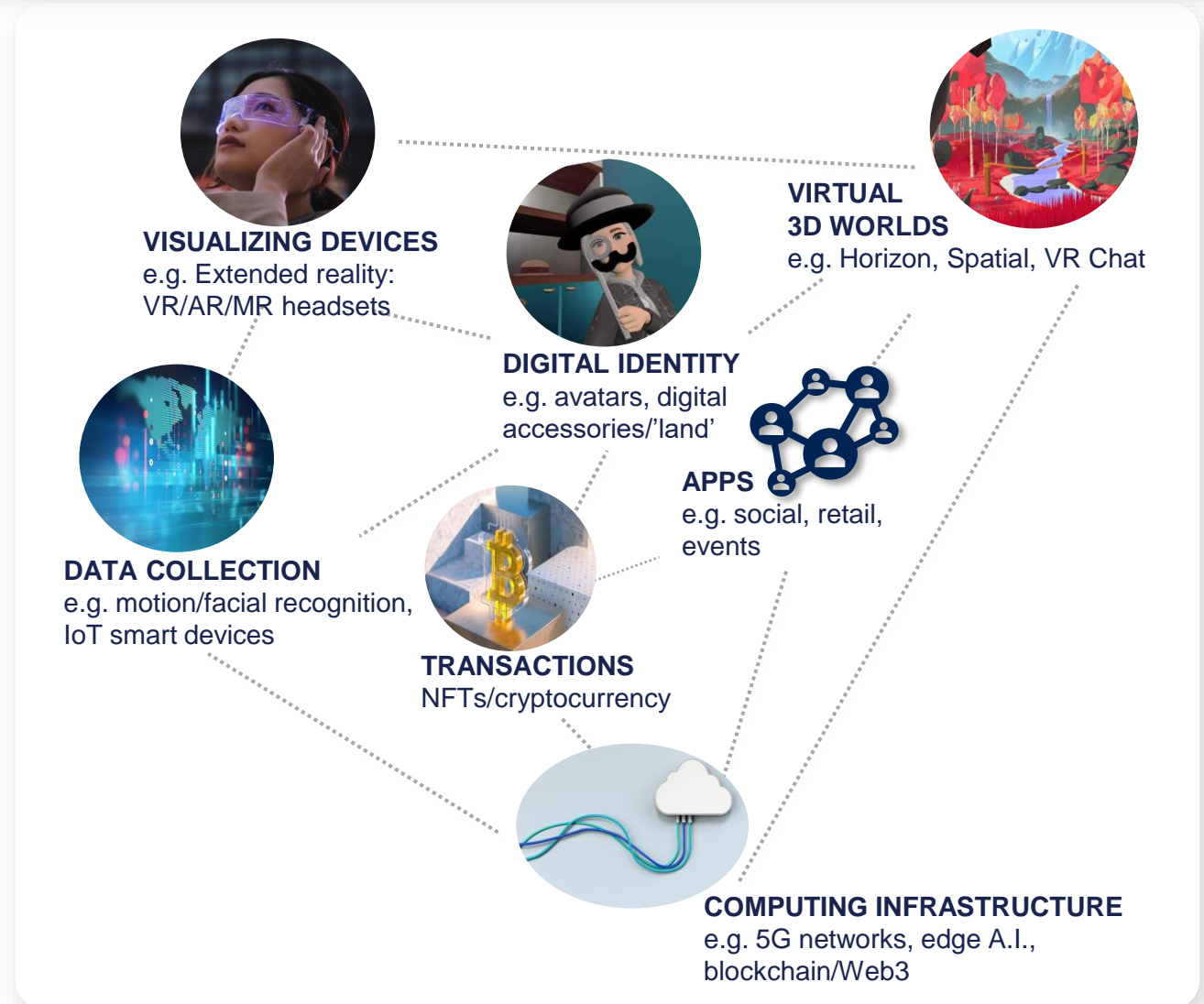
# What is the metaverse?



Over the last few years, the term 'metaverse' has exploded into mainstream media and as a vision for the future of the internet and e-commerce.

The metaverse will be a **connected ecosystem** of many digital technologies – where physical and digital worlds merge to deliver a “phygital” experience.

The vision for a seamless 'metaverse' hasn't been realized yet.





# Metaverse & extended reality may provide a 'phygital' experience



"Where is the nearest...  
... clothing boutique?"



30 blocks by foot



Travel via bike  
(saves you 5 minutes)



**OFFER**  
\$12 TAXI RIDE  
2 min to pick-up  
Say "TAXI" for geo-location

E-TRY ME ON:  
VIRTUAL MIRROR



ACCESS  
DIGITAL CLOSET



BUY NOW



Pay VIA

- Crypto wallet
- Digital wallet
- Phone Pay



**SPONSORED**  
Add \$5 for professional,  
virtual stylist to help style  
your outfit

# However, current technology are singular 'metaverses' or engagements, and aren't yet fully interconnected.



### VISUALIZING DEVICES

e.g. VR headsets



VR headset – Samsung Gear VR



Augmented reality apps (phone/tablet)

### VIRTUAL 3D WORLDS

e.g. Decentraland, VRChat, Horizon



World in Decentraland



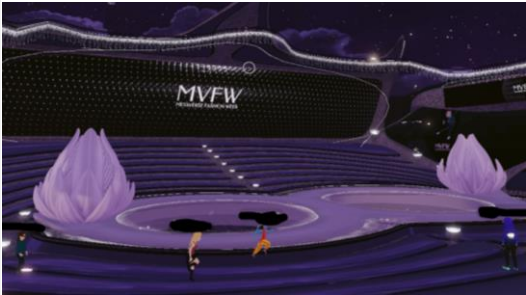
VR Chat – custom-built 'museum' world

### APPS

e.g. Socializing and/or events



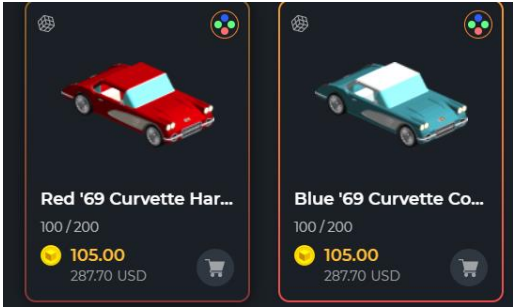
Horizon venues for events/socializing



Metaverse fashion week in Decentraland

### DIGITAL IDENTITY

e.g. avatars, digital accessories/'land'



NFTs for sale in Sandbox



Avatars in VR Chat

# WHAT WE DID

*Background & Discovery User Research*

# 2

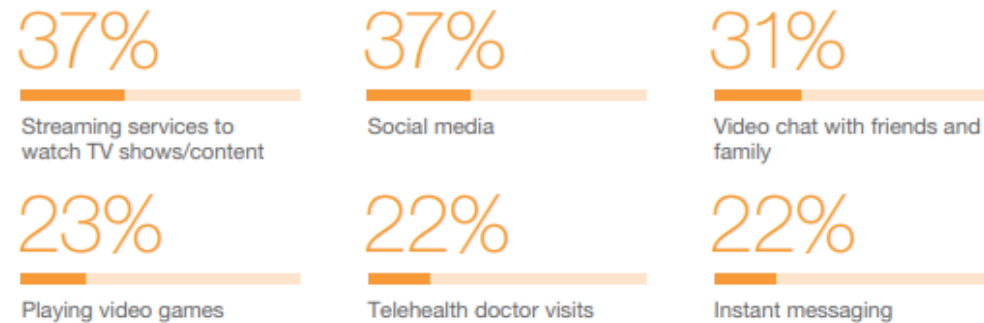
# Growth of virtual reality purchases over COVID-19



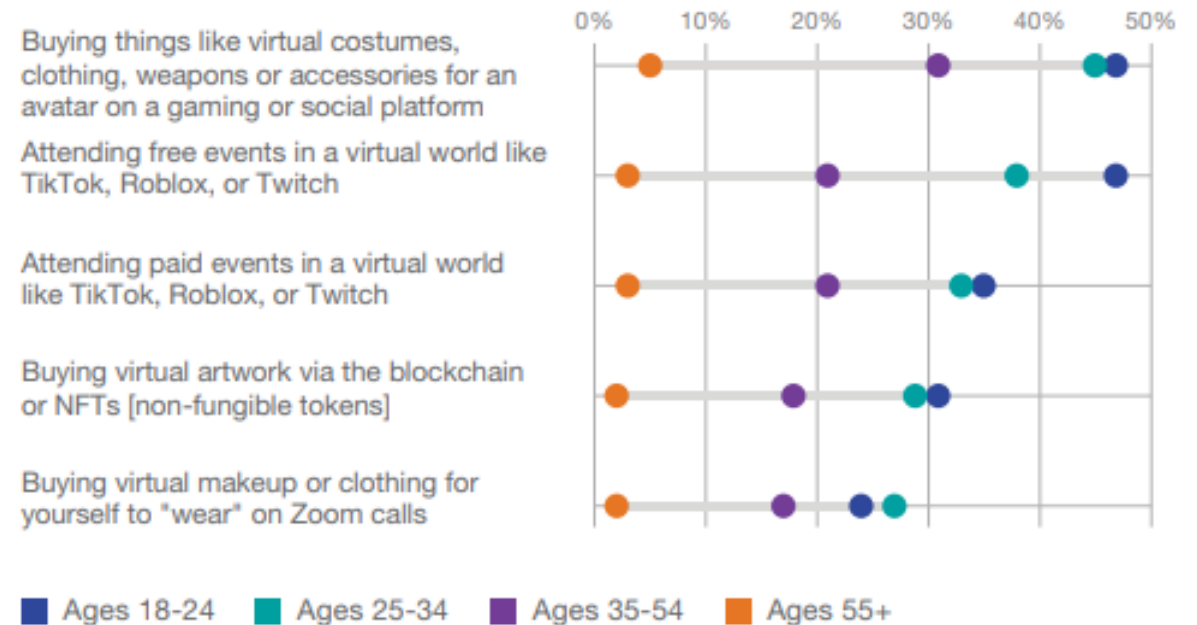
In 2021, VR/AR consumer purchases & shipments of headsets grew **92.1%** worldwide.\*

Sales of Meta Quest 2 account for 78% of this growth.

Which of the following are you doing more now as a function of COVID-19? \*\*



How familiar are you with the following activities for games or other virtual environments? \*\*\*



- Ipsos UX -

\*"AR/VR Headset Shipments Grew Dramatically in 2021, Thanks Largely to Meta's Strong Quest 2 Volumes, with Growth Forecast to Continue, According to IDC," IDC (International Data Corporation, March 21, 2022).

\*\*Ipsos Coronavirus Consumer Tracker conducted Apr. 27-28, 2021, among 1115 US Adults

\*\*\*Matt Carmichael, "What Are the Limits of Virtual Today and Tomorrow?," *What the Future: Entertainment* (Ipsos, May 13, 2021), [https://ipsosgroup.sharepoint.com/sites/int-MarketStrategyUnderstanding/Omnichannel%20Leadership/Omnichannel%20POVs/Ipsos\\_What-The-Future-Entertainment.pdf](https://ipsosgroup.sharepoint.com/sites/int-MarketStrategyUnderstanding/Omnichannel%20Leadership/Omnichannel%20POVs/Ipsos_What-The-Future-Entertainment.pdf).

# COVID-19 increased & diversified VR experiences



People began to use VR platforms and activities more frequently over the past two years, for:

- Socializing and connecting with others remotely
- Watching video content
- Fitness



*It is an important part of my life now all because of COVID. Before COVID, I didn't necessarily make time for these experiences. COVID allowed me to experience new things.*  
- Raziyah, Female, 18-24

	Pre-Covid to Now Using VR 1x/week or more	Using VR 1x/week or more now
ACTIVITIES	Only VR Owners who purchased pre-pandemic (N=23)	ALL USERS (N=36)
Gaming	↑ 15%	92%
Socialize/meet with others	↑ 50%	75%
Socialize/meet with others to play games in VR	↑ 25%	75%
Watch video content	↑ 50%	75%
Work out in VR	↑ 30%	61%
Travel in VR	↑ 15%	58%

# Our Research Approach



**We wanted to understand why VR users habitually use their headset – and what other uses they have for it outside of gaming.**

**We also set out to discover:**

- Role of VR and virtual worlds through the course of the pandemic, up to now
- Experience (good/bad) of current technology
- Hopes and fears for future tech developments (e.g. XR, NFTs, etc.)



# Who we talked to & why



**We spoke with a mix of 36 VR users.**

- 28% purchased their headset 3+ years ago
- 11% purchased their headset before COVID
- 33% purchased within the last year

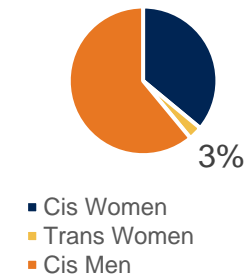
**All VR users used their headset at least 1x/week.**

**They used VR for a variety of activities:**

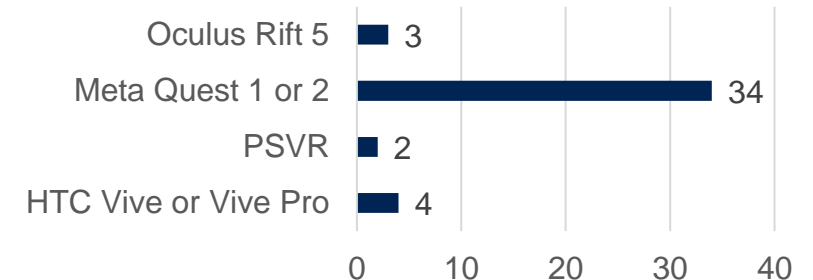
- Gaming
- Socializing
- Art
- Productivity
- Fitness



## Mix of Genders



## Headset(s) Owned



## Mix of Race/Ethnicity

White/Caucasian: 48%  
Black/African-American: 17%  
Latin/Hispanic: 17%  
East Asian or East Asian-American: 8%  
Southeast Asian or Southeast Asian-American: 5%  
Other: 5%

## Mix of ages

18-24: 12  
25-29: 5  
30-35: 5  
36-45: 10  
46-55: 4

# WHAT WE LEARNED

*Key Insights & Opportunity Areas*

# 3



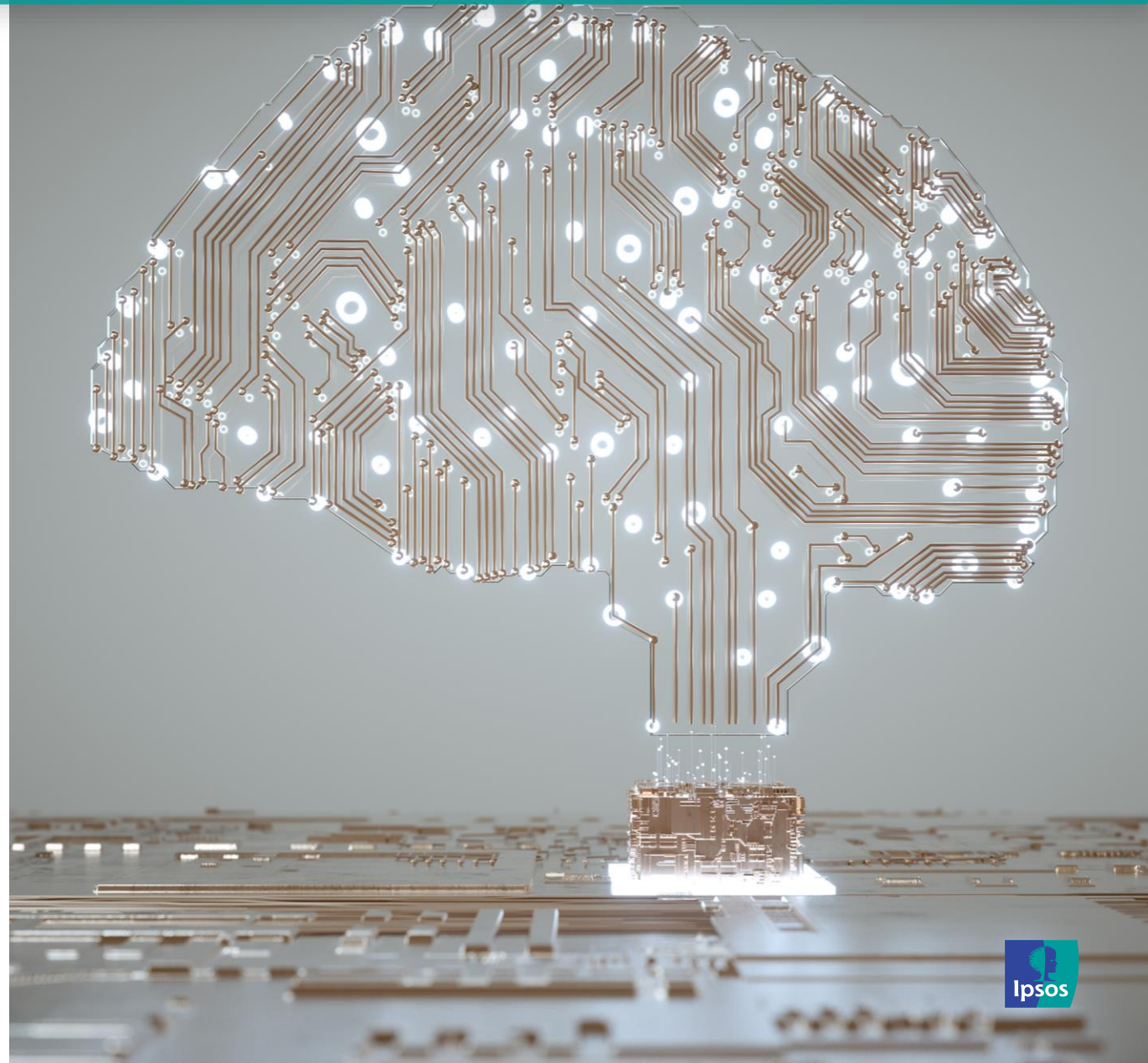


## Standout Experiences



**We discovered why users value and use virtual reality and immersive platforms as tools to connect with others and try new experiences.**

- Socializing
- Exploring
- Simulation





# STANDOUT EXPERIENCES: SOCIALIZING (1/2)

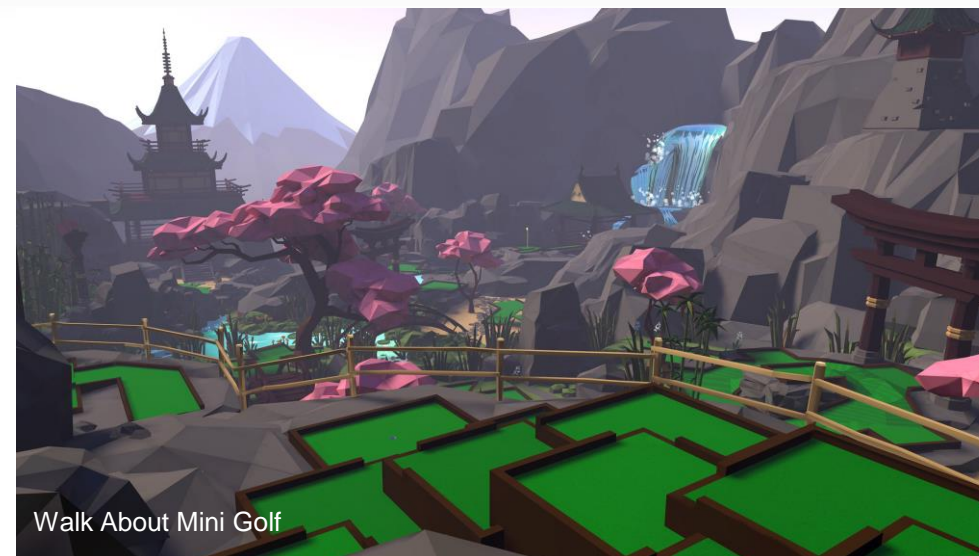


After gaming, VR is valued as a way to socialize & connect with other people from anywhere, such as:

- Strangers
- Friends (made online or offline)
- Family

Virtual worlds allow people to spend time with others even when isolating, and today people still hangout virtually today when they can't meet up in person, to:

- Play games
- Watch movies
- Explore VR worlds
  - e.g., VR Chat, Horizon, Walkabout Mini Golf



Walk About Mini Golf



*I get to play mini golf on these really visually pleasing apps while talking to the person I'm playing against .. I also love to fly around & explore parts of the map where you don't typically golf.*

**- Aaron A., Male, 18-24**

## Considerations for XR & Metaverse

Provide a variety of immersive worlds and/or environments (dynamic, high quality, interesting places)

Include interactive elements – many social experiences rely on side-by-side activities or games

Allow users to control whether they meet others in virtual worlds either publicly or privately

*Industry applications: Social Media, Gaming & Entertainment*



# STANDOUT EXPERIENCES: SOCIALIZING & PERSONALIZATION (2/2)



**People like to do VR activities with their friends, family, and even strangers, for example:**

- Selecting and/or creating and showing off avatars
- Exploring new places
- Playing games, watching movies, dancing

**People want even more ways to connect with others and personalize their experiences:**

- Realistic avatars
- Create their own virtual home/environments
- Host parties or events



*It would be nice to create my own living space, my own office space, my own environments. Not just choose from cookie cutter templates.*

**- David, Male, 36-45**

## Considerations for XR & Metaverse

Introducing accessories for avatars (e.g. pets, makeup, fun hairstyles, brand name clothing)

Curate virtual home environments (design own home exterior / interior)

Implementing activities like board games, movie watching parties in a virtual home environment

*Industry applications: Fashion, Beauty, CPG, Interior Design, Tech, Gaming*



# STANDOUT EXPERIENCES: CUSTOM SOCIAL EXPERIENCE



***It's an open world environment. We can play sports or go to Virtual concerts. Players are also allowed to own property within this virtual environment and are allowed to host events or parties within their property.***

*[My Ideal Social VR Platform]*

**- Huy, Male, 18-24**



***"I like the cool avatar options in VR Chat. You really get to see people's interests and personalities when you see their avatars. I want my social platform to have options [that are] realistic avatars as well."***

*[Ideal Feature for my Social VR Platform]*

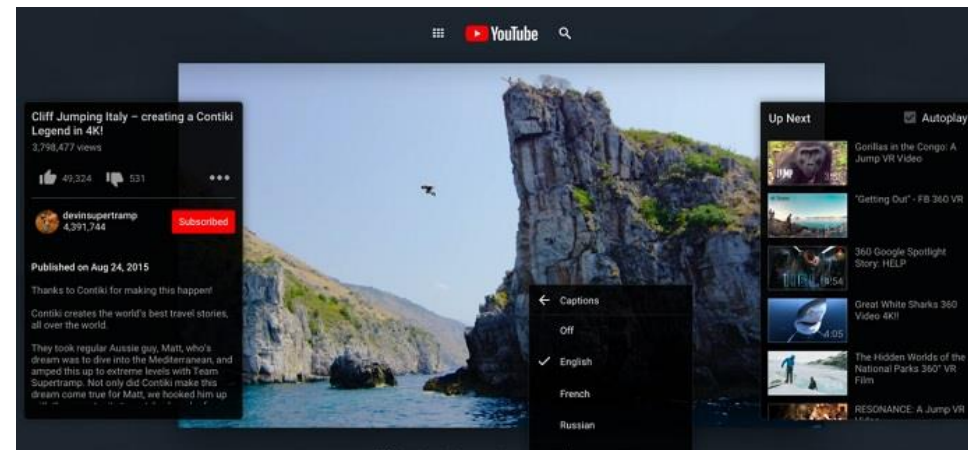
**- Tanya, Female, 36-45**



# STANDOUT EXPERIENCES: EXPLORING



During the pandemic, people used VR to travel to new places all over the world and try new experiences.



*I like Wander because it lets me pick places and then just go there and explore.*

**- Daniel, Male, 46-55**



*It allows me to see animals in 3D areas, travel, go to events, see supernovas in space, all new experiences all from the comfort of my own home.*

**- Emily, Female, 25-29**

## Considerations for XR & Metaverse

Build extended reality experiences based on people's interest to travel, learn, experiment, & explore  
Continue to link virtual travels and experiences with physical ones

*Industry applications: Travel, Tourism, Events*



# STANDOUT EXPERIENCES: SIMULATION



People love how VR gives them a way to test out, or simulate experiences they can't always do conveniently in real life.

- Scuba diving
- Being a paramedic

People wanted more simulated experiences in VR so they could try them prior to a real-life experience:

- Learn skills in VR that apply to real life
  - E.g., Cooking, Playing Music
- Demoing a job prior to switching careers
- Trying on an outfit in VR prior to purchase



## Considerations for XR & Metaverse

Simulated experiences/virtual demos may be a new entry point to reach consumers in a unique way  
As tech develops, consider adding *haptic feedback* (e.g. sense of touch) to elevate impact

Industry applications: CPG, Travel, Education, E-Commerce



**I wish it had more AR where it would be more mixed reality ... because it would become more real like you really are there [with] an exercise coach - it would be like he's in the room yelling at you.**

*- Leroy, Male 46-55 years old*



## Opportunities to Grow



**We uncovered areas where VR software and hardware need an improved user experience to ensure user sentiments remain positive.**

- Software performance
- Sensory experiences
- Safety & harassment
- Accessibility & privacy





# OPPORTUNITIES: SOFTWARE & HARDWARE PERFORMANCE



Currently, enthusiasts are disappointed with the low graphics and lack of consistency they experience in VR.

**They're frustrated by the following:**

- Lag or slow loading times of virtual worlds
- In-platform glitches or hardware glitches
- Overloaded servers

**People want:**

- High quality imagery so virtual experiences more closely resemble real life
- Lighter headset and longer battery life so they can spend more time in VR



## Considerations

Keep in mind the potential access limitations people have (e.g., internet signal strength, hardware)

Aim to strike a balance to provide high quality experiences, consistency, and weight/comfort of equipment

Acknowledge when system issues happen & help users troubleshoot when glitches and/or errors occur

*Industry applications: Tech, Gaming*

# OPPORTUNITIES: SENSORY EXPERIENCES



Interest in multi-sensory experiences is prevalent.

People want ways to more immersive themselves in VR experiences to blur between digital and physical:

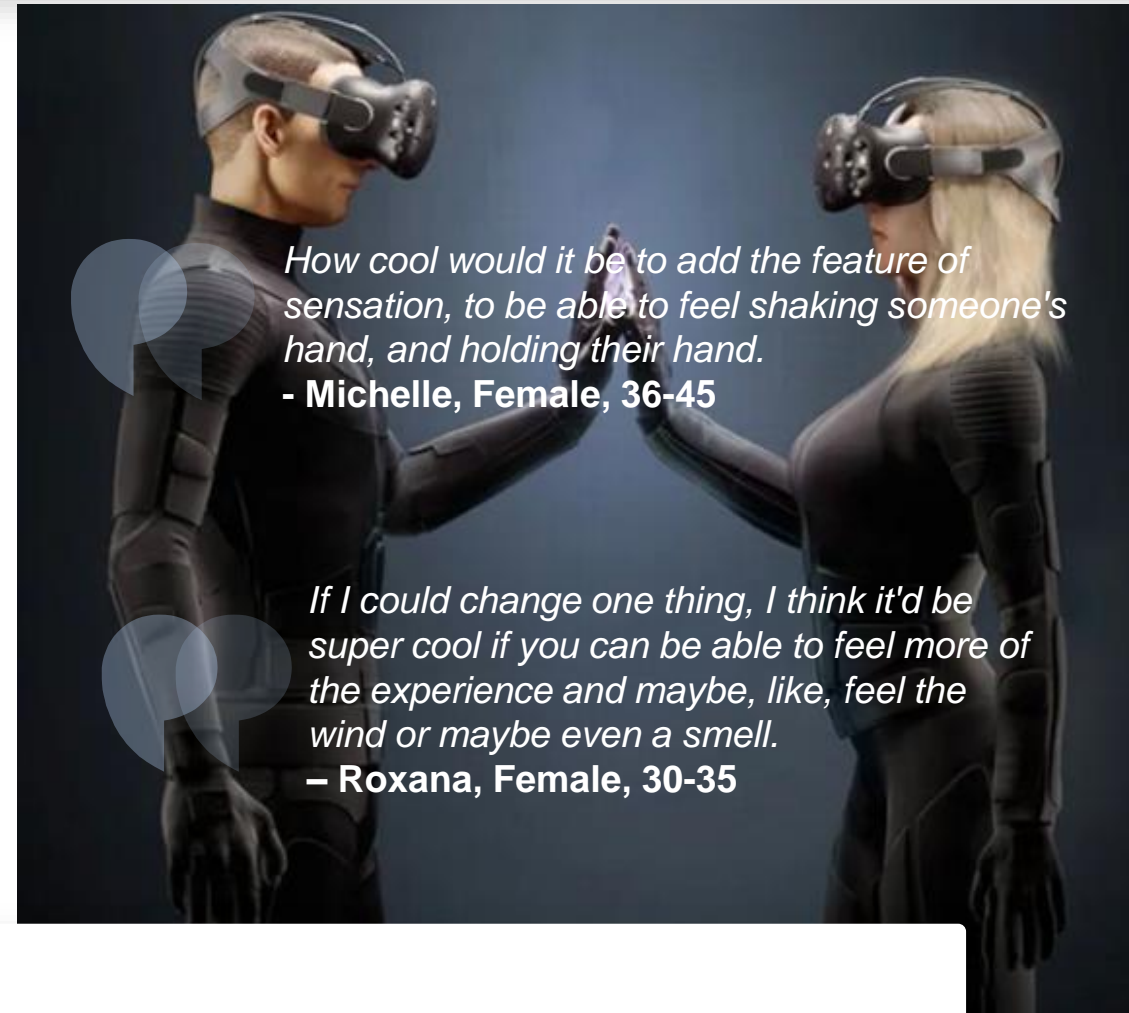
- Touch
- Taste
- Smell

People wanted accessories like:

- Haptic gloves (e.g. high-fiving, feeling water)
- Body suits (e.g. trying on clothes, hugging)
- Smell cartridges (e.g. smell the ocean while on the beach)

## Considerations

Touch allows for more personal and intimate connections when meeting loved ones through virtual reality  
Improved sense of touch may make picking up or trying products feel more realistic



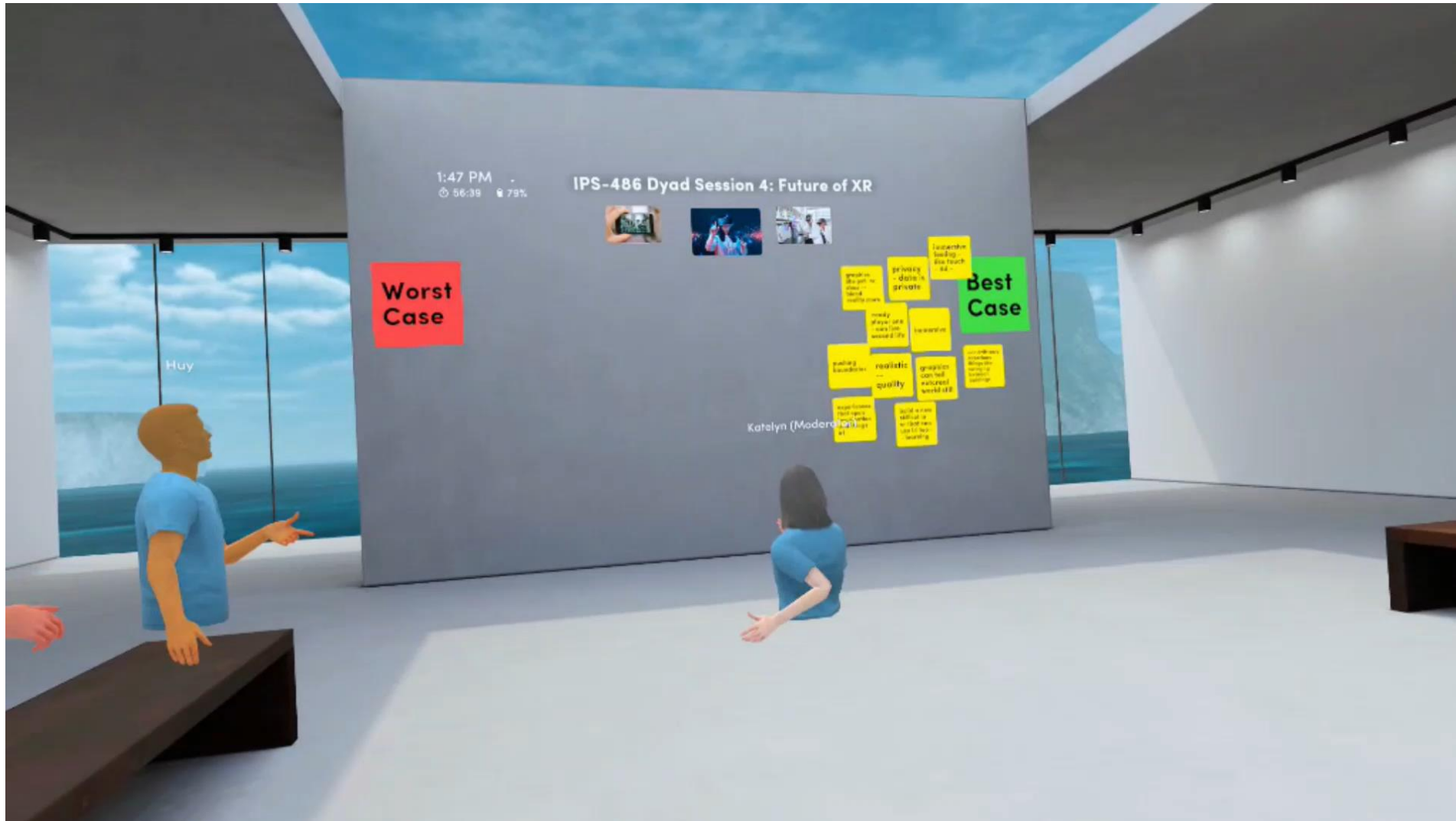
*How cool would it be to add the feature of sensation, to be able to feel shaking someone's hand, and holding their hand.*

**- Michelle, Female, 36-45**

*If I could change one thing, I think it'd be super cool if you can be able to feel more of the experience and maybe, like, feel the wind or maybe even a smell.*

**- Roxana, Female, 30-35**

# VIDEO: SENSORY EXPERIENCES





Generally online, people see it as a space to **do whatever they want**. They'll do things that **they will not do in real life**. They're anonymous...**they throw away their morals** when they go online sometimes.

*– Ruiman, Female, 18-24*

# OPPORTUNITIES: SAFETY FEATURES



Many public and immersive, virtual worlds lack quality moderation and stricter anti-harassment platform features - like blocking users who scream slurs.

**People shared several instances of toxic encounters they've experienced from strangers – even from kids- while in a public VR world or environment:**

- Verbal harassment (e.g., slurs, name calling, yelling)
- Bullying
- Stalking
- Inappropriate behaviors
- Invading space



– Ruiman, Female, 18-24



*It's sort of the wild west in there.*  
– Wolf, Female, 18-24

## Considerations

Include safety settings or controls that auto-ban or flag keywords

Add a way to ban or block individuals exhibiting inappropriate behavior or control space around avatar

Increase moderators throughout VR worlds **or** add age restrictions

*Industry applications: Social Media, Gaming*

# OPPORTUNITIES: ACCESS & PRIVACY



People are concerned that the price of VR or metaverse experiences will rise as more content is added and technology improves:

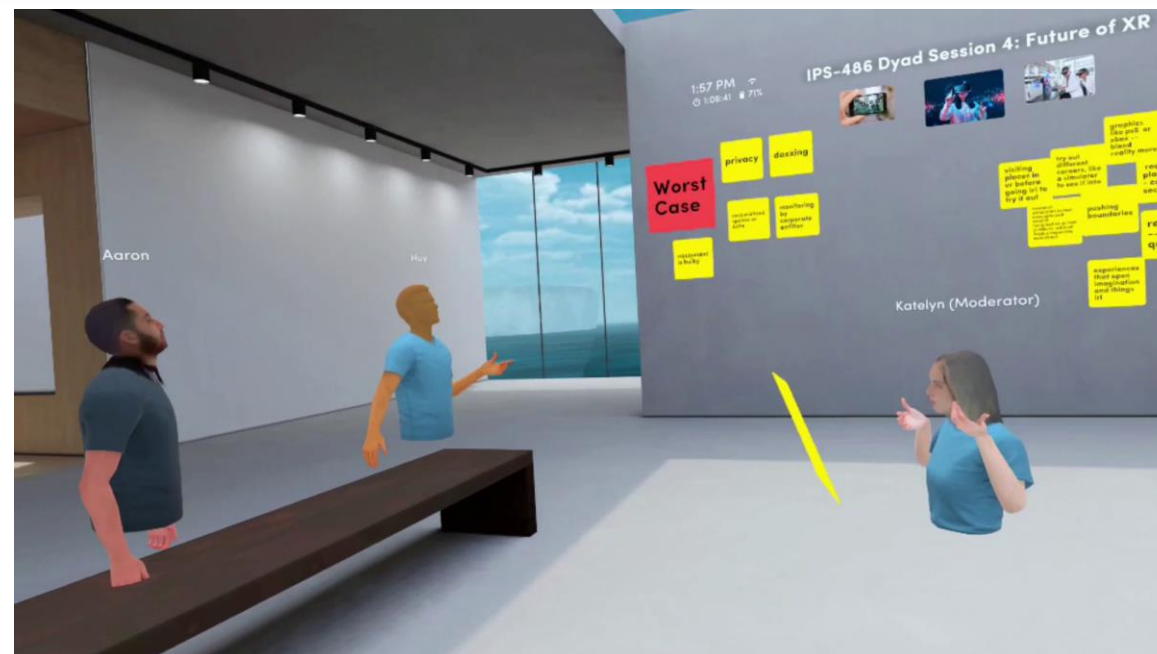
- Increased hardware costs
- Paywalls and subscriptions
- Expensive pricing of apps
- Ad integration

Additionally, people are concerned about their data being collected by companies:

- Insecure storage – data breach
- Sold to third parties

## Considerations

Be mindful about sensitivity to paywalls and costs as you work to include your audience  
Build in transparent and clear language for how data will *and won't* be used, if collected at all  
Clearly explain how data is protected – consider granting user control for how data is used



*If I could change one thing, it would be accessibility to VR and augmented reality. They are not widely available to the wider public and I would like the cost of both of these to decrease.*

**– Matthew, Male, 18-24**

# So What?

*Our 6 Key Takeaways*

# 4

# 6 KEY TAKEAWAYS



## CURRENT BEHAVIOR & INTERESTS PROVIDE INSIGHT INTO FUTURE XR USE CASES

- People value and use VR to explore new places, socialize with others, and simulate/learn about new experiences.
- Multi-sensory experiences may improve immersion by blending physical & digital.



## IMPROVED TECHNOLOGY MAY ENCOURAGE CONTINUED USE

- Poor hardware & software performance of VR creates cumbersome, low quality experiences.
- Lighter, less bulky hardware may improve comfort and may encourage use for longer periods.



## SAFE & SECURE EXPERIENCES ARE IMPORTANT TO USERS

- Public XR platforms must include safety measures to prevent against harassment from other users.
- People expect transparency around how companies use, store, and manage their data.



**THANK YOU!**

**Q&A**  
*Discussion*



# Appendix

# 5

*What is Ipsos UX?*

A photograph of two women in a library setting. One woman, wearing a black hijab and a blue denim jacket over a white and green striped shirt, is pointing at a laptop screen. The other woman, with long dark hair, is looking at the screen. The background shows bookshelves and a warm lamp. A diagonal graphic of teal and blue stripes is in the top left corner.

# INTRODUCING **USER EXPERIENCE**

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## What We Do

Ipsos harmonizes the right approaches, the right data sources and the right technology to provide our clients a Total Understanding of people and the context in which they make choices.

User Experience (UX) focuses upon the goals and pain points a user has when interacting with a business at any touchpoint. When users are able to complete their goals quickly and easily, they are more likely to use that service again. Examples of experiences we focus on:



Website



Unboxing



App



Service



Device



Vehicle



Voice UI



Consumer electronics/ durables

# Business Questions We Answer

## Core Reasons to Use Ipsos UX

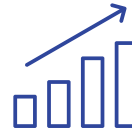
1. We help clients acquire and retain users by designing experiences that users want to adopt into their lives.
2. We help clients improve experiences to ensure users return regularly and interact more often with their products or services.
3. We help clients save money by focusing only on the features users really need, rather than what the client teams assume they need.

**Our solutions place users at the heart of design decision making.** We integrate experimentation, agile and iterative design into our approach to ensure we can support large and small projects with the same core methodology.



**How can we design products** and services that will encourage more users to interact with them and adopt them into their lives?

**How can we improve our conversion rate,** to turn more visitors into customers?



**How can we ensure our product enhances user performance,** minimizes human error, and maximizes safety?

**How can we reduce our design and development costs** by focusing on the key product features that users really need?



**How can we improve the experience of our digital products** and services, so they are better than our competitors?

**How can we identify the pain points** in our digital experience and remove barriers to usage?

# Why Ipsos?



**We place users at the heart of decision-making.**



**The process we use has been refined over decades** and is founded on the principles of industrial design, applied psychology, human-computer interaction, and ergonomics.



**Importantly, as part of Ipsos, our UX/ HF services are elevated** through the integration of other Ipsos services, such as CX, Behavioral Science, Neuroscience and Innovation.

## USER EXPERIENCE

### EXPLORING EXPERIENCES

#### Listen & Observe:

- Expert Review/Heuristics
- Ethnography
- Experience Diaries
- Competitor Benchmarking

### EXPLORING EXPERIENCES

#### Discover Needs:

- Journey Mapping
- User Personas
- Strategy Workshops
- Accessibility

### DESIGNING EXPERIENCES

#### Ideation & Design:

- User Interface Design
- Service Design
- Info Architecture
- Wireframing & Prototyping



## Our Services

We guide you through the process

### DESIGNING EXPERIENCES

#### Iterative Evaluation:

- Prototype testing
- In Lab/On-Site/Remote
- Qual or Quant

### DESIGNING EXPERIENCES

#### Analytics & Monitoring:

- UI Design Guidelines
- Training Materials
- Digital Analytics

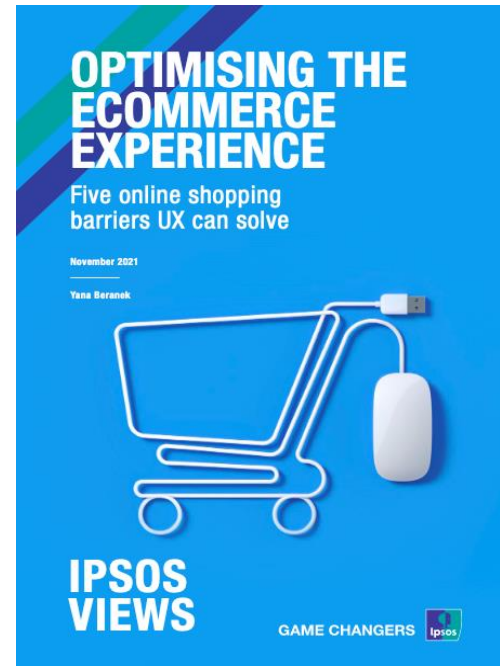
### DESIGNING EXPERIENCES

#### Validate Design:

- Validation/Pre-Launch Testing
- Quality Assurance

# Access Our Recent Thought Leadership

Ipsos is one of the world's leading market research companies, operating in 90 markets and employing 18,000 people. Our passionately curious research professionals, analysts and scientists have built unique multi specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.



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