

UNDERSTANDING THE LANDSCAPE:

A 360° VIEW OF THE METAVERSE AND WEB3

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GAME CHANGERS



Meet Our Speakers

Today's presenters



Natalie Lacey

Executive Vice-President

Leads the Media and Entertainment Platforms Business line



Yana Beranek

Global Head of UX

Leads the Global UX Research and Design business



Philip Ryan

Partner, Strategy3

Leads the Innovation, Trends & Foresight Practices within Ipsos' growth consultancy



Nicole Massa

Head of Gaming Strategy

Leads gaming strategy within Media and Entertainment Platforms



Today's Webinar



To support brands and companies through the development or evolution of Web3 strategies, we will share our 360° view of the emerging landscape and explore three key components:

Current awareness, behaviors, and interests of audiences

Technology and user experience

The broader context for how Web3 can find its place in an evolving world

Each component contributes to determining and defining the best formula to create a unique and authentic experience for your brand and audience within Web3.



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

Emerging Landscape

All Eyes on Web3

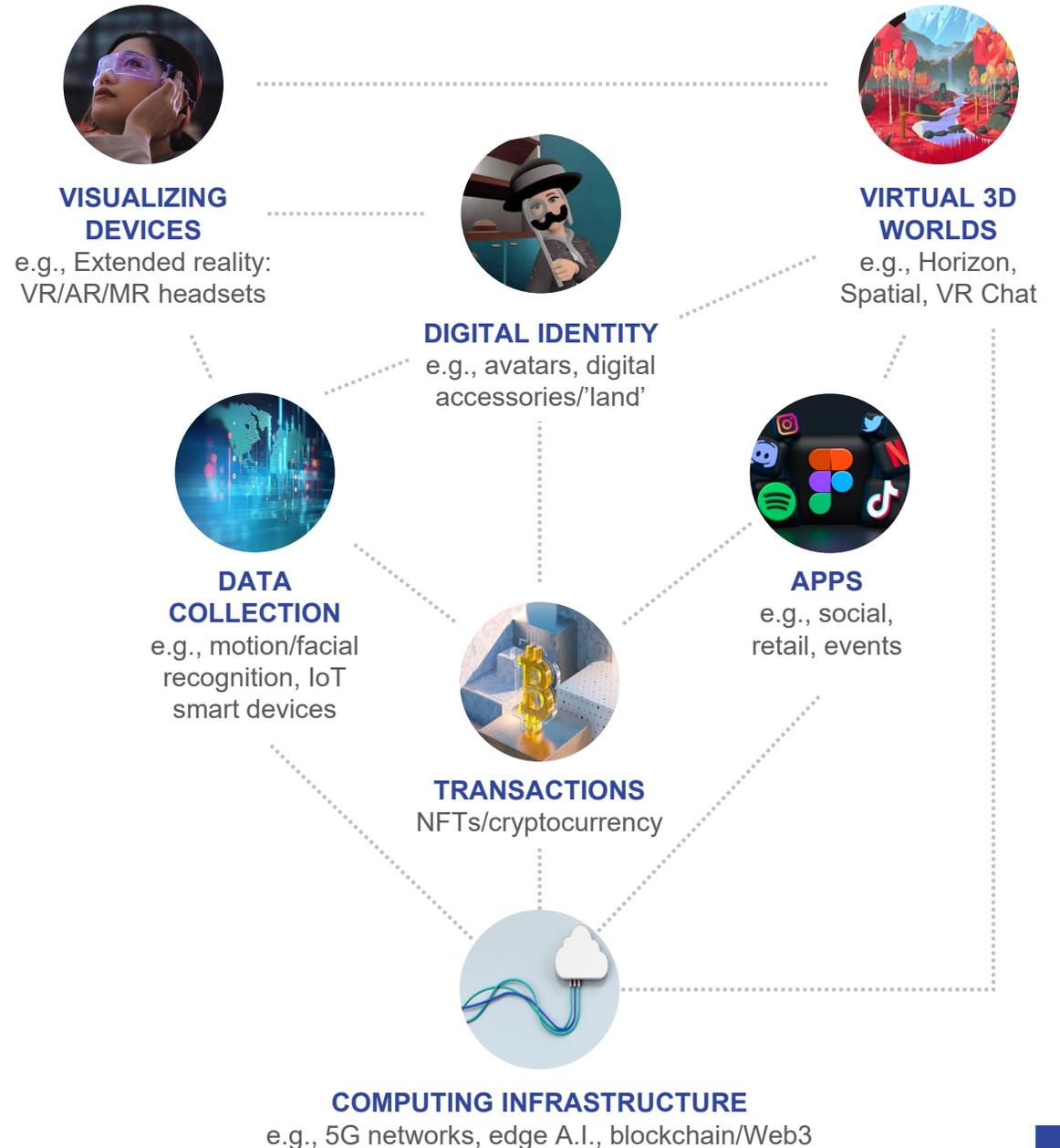


A more immersive & physically-connected internet

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.

We anticipate a **connected ecosystem** of many digital technologies – where physical and digital worlds merge to deliver a “phygital” experience.

The vision for a seamless experience that leverages these technologies hasn’t been realized yet.





More immersive virtual experiences: using virtual reality to access virtual 'metaverse' worlds, build an identity, play games & 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

Seamlessly connected physical & virtual worlds:

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



More engaging real-world experiences: augmented reality experiences used on 'legacy devices' like phones to overlay digital content onto the real world.



Real-time photo filters



Visualizing furniture

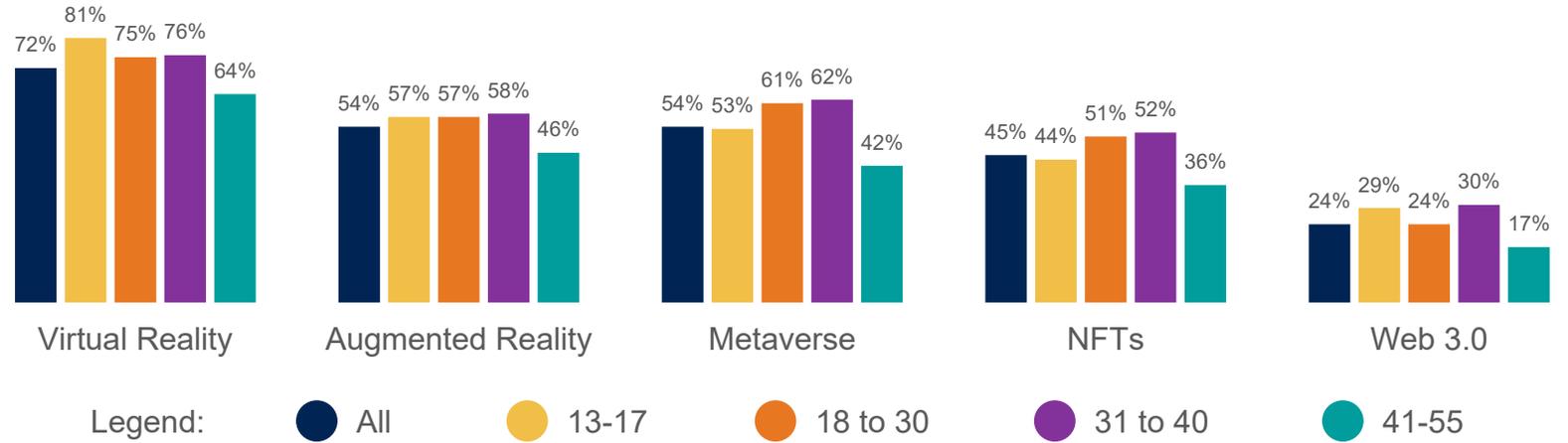


Virtual product try-on

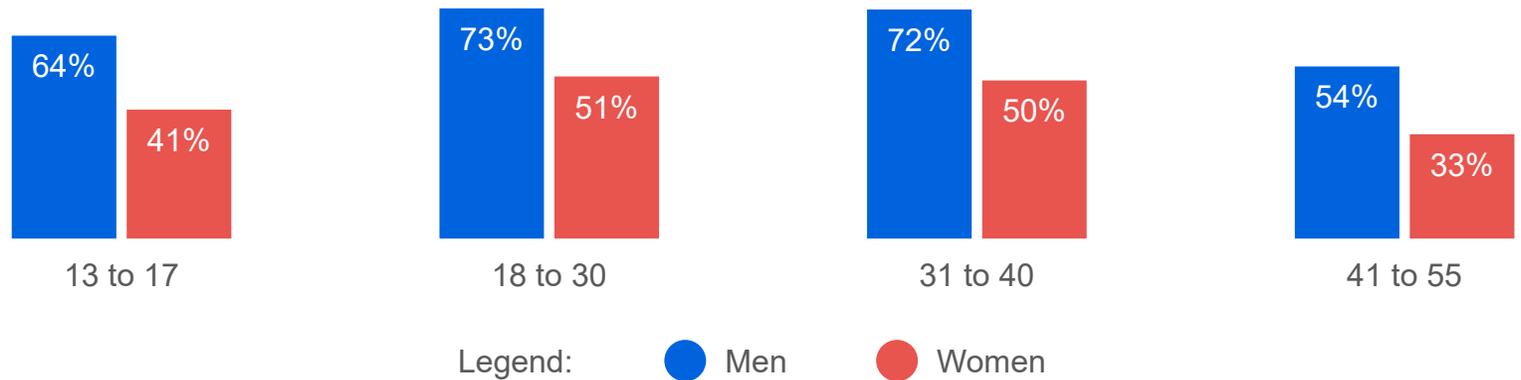
This is not just about young people.

But there is a pervasive gender gap.

% Aware (know a lot + know a little)

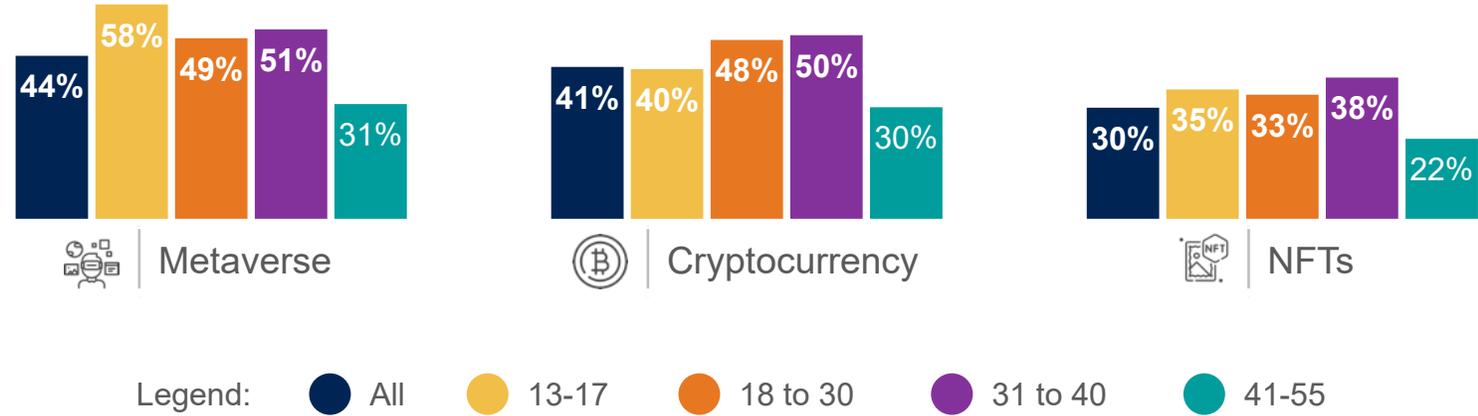


% Aware (know a lot + know a little about metaverse)



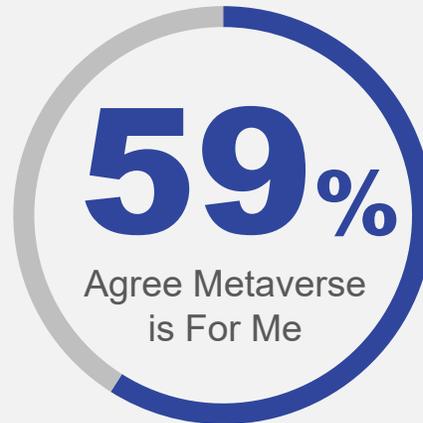
Sense of personal affinity correlated with awareness

% Is For Me



Awareness x Affinity

Among those who know about the Metaverse



Among those who are not aware:



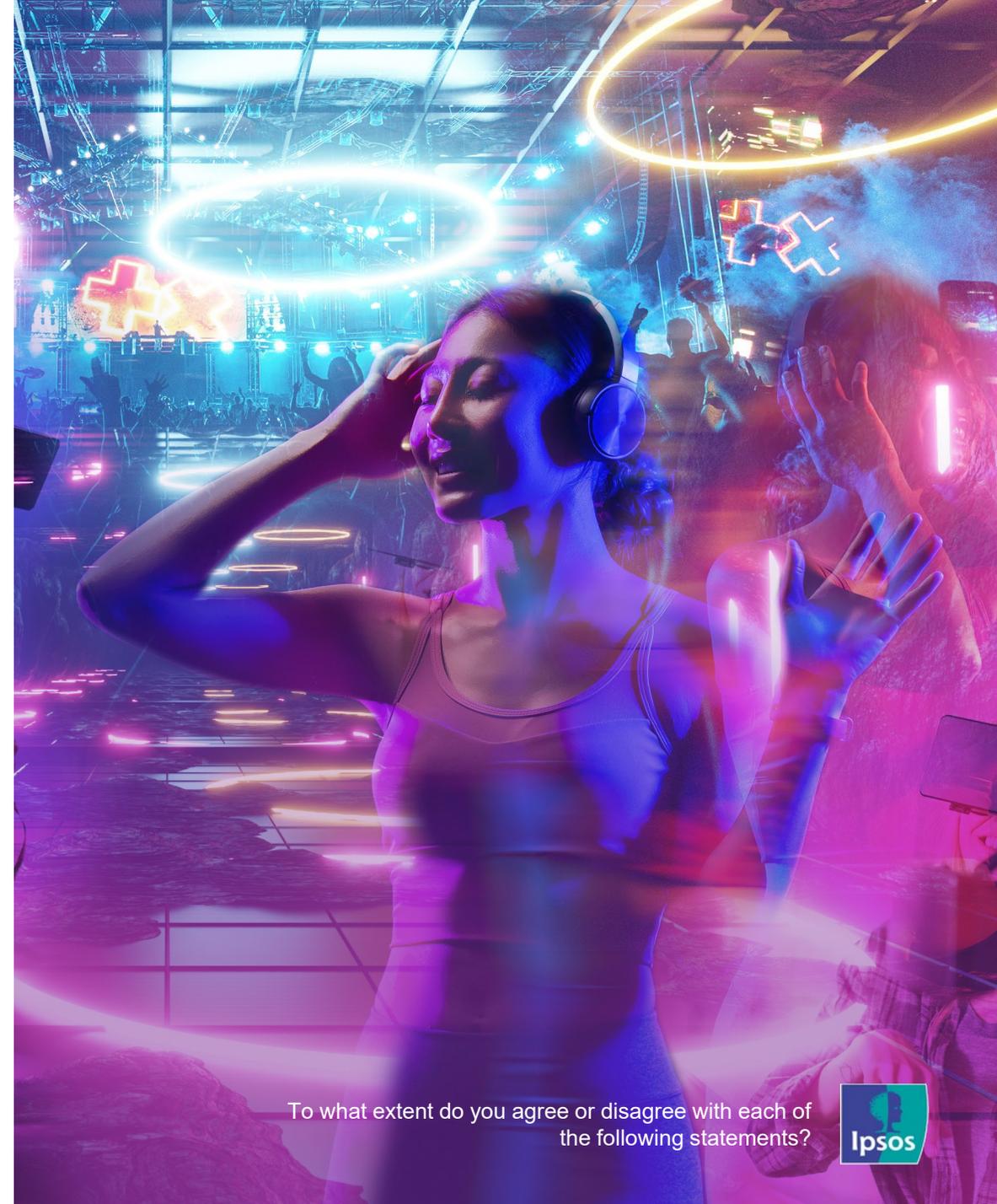
Familiarity also links to interest in participating in virtual worlds

% Agree



Legend:

- All 13 to 55
- Among those who know a lot or a little about the metaverse



To what extent do you agree or disagree with each of the following statements?

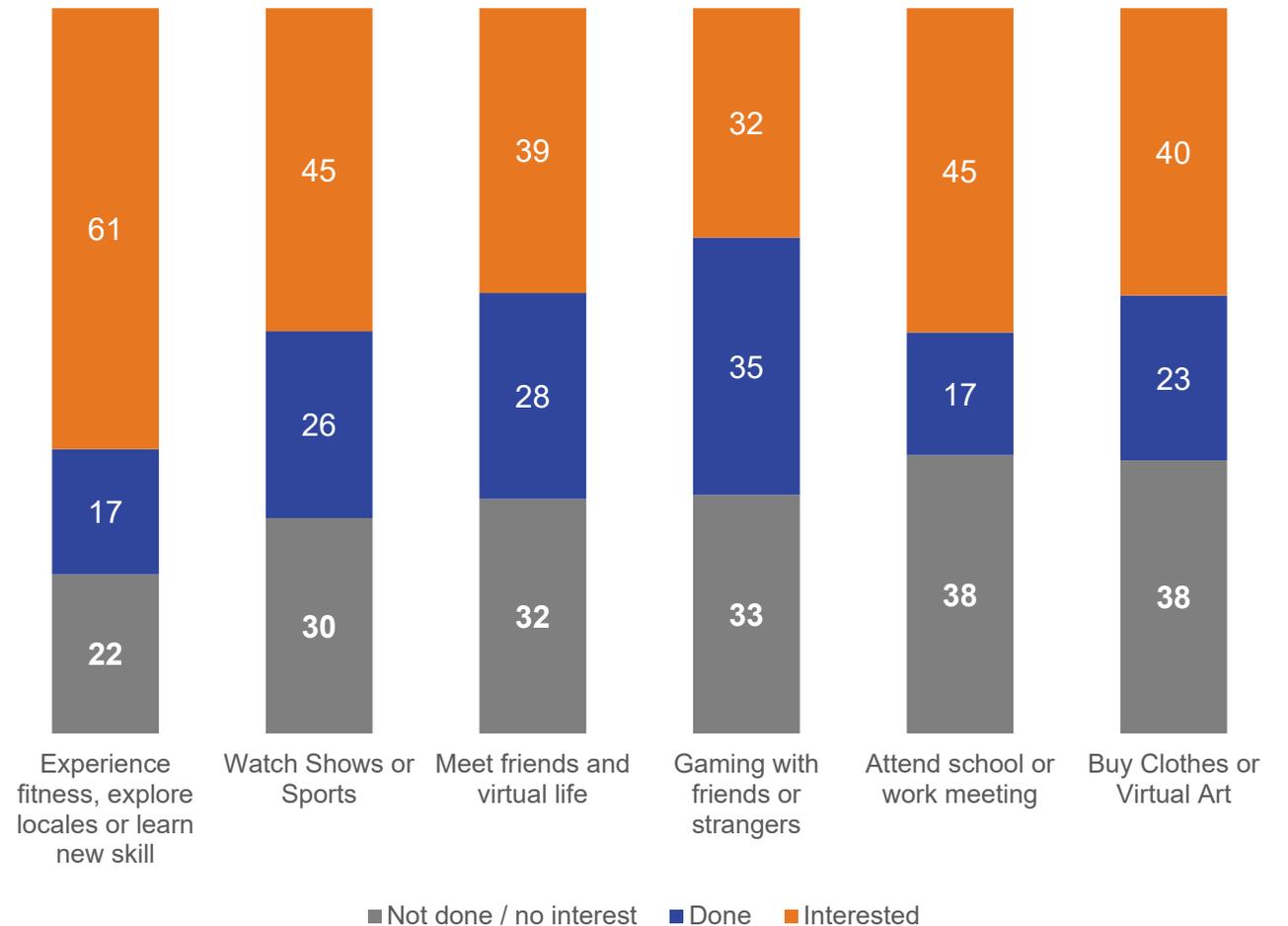
Current Behaviors and Interests of Your Audience



56%
report having participated in an **immersive experience**



75%
say they are **interested!**



Which of the following activities, if any, have you done in an immersive virtual experience or metaverse? If you could do each of the following, how interested would you be in doing this in a virtual immersive experience or metaverse?

Positive Momentum and Potential for Immersive Experiences



Playing games



Entertainment including movies and concerts



Education and learning



Connecting with friends and family



Shopping



Meeting new people



Work and other professional activities



Ability to be your true self in a virtual world

	Total	56%	53%	51%	49%	46%	45%	42%	39%
Male 		62%	59%	55%	56%	53%	53%	49%	46%
Female 		50%	47%	46%	43%	40%	36%	35%	33%
		-13%	-13%	-9%	-13%	-13%	-17%	-14%	-13%



Thinking about the opportunity for these immersive experiences, do you think a metaverse will make the following better or worse than the way we do things online today?

Why Think About it Now: The Present Opportunity



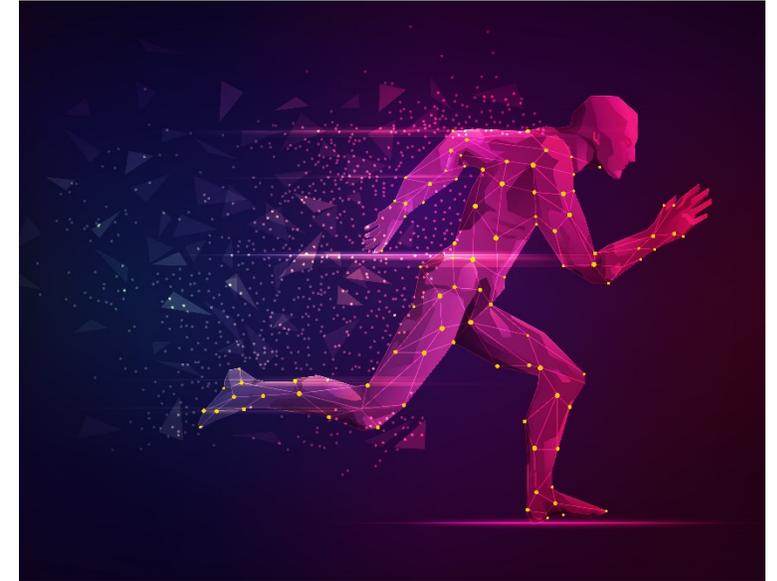
Create The Future

The future has not yet been created, and **we can influence the outcome**



Stepping Stones

There's strategy, research, innovation **work that can be done today**



Digital Progress

Help facilitate further **digitization of industries and categories**

Let's go backward before we go forward



**This is not simply a story about technology
It's a story about how we behave, how
we think and how we relate**

Why Think About it Now: The Future Watch Outs



Watch your 6...and your 3, 9 & 12

Web3 may create your new competition, or **upend your category**



Limited thinking

You don't want to end up as **just another brand buying ads** in a new channel



Consider human nature

Any new technology can be expected to be **used for good, and for evil**

Understanding the Landscape of Web3

...Now And In The Future



Future-back Planning

Envisioning experiences, application, opportunities, risks, and questions to ask in order to shape your position within Web3...and Web3 itself



Trend Spotting

Understanding audience attitudes, behaviors and consideration, narrowing in on their desires and needs to develop strategies that are the right fit for your brand and your consumers...



Application And Usage

Understanding the relevant and useful technologies, usage of tech and devices, and how to design in order to create a memorable user experience...

Finding the Right Formula

2

Finding the Right Formula

1

The broader context/
describe the future scenario

2

Who the audiences for
these use cases would be

3

Describe how the
experiences would actually
be designed/implemented



Future Scenario



2028

Imagine a world where...

you want to buy a new sweater, so you ask your virtual assistant where you can find a clothing boutique that has carbon negative cardigans. Seconds later, you're following the path your XR contacts pave in front of you...

Later, instead of watching Netflix, you virtually sat on the beach in Corfu, Greece to unwind after a tough workday.



2030

Imagine a world where...

you're training a new employee and they 'goggle share' with you, zapping into your view of the world thanks to immersive technology.

That afternoon, your surgeon virtually performs tomorrow's open-heart surgery three times using a digital twin of your body.



2032

Imagine a world where...

Instead of a new smartphone, your immersive 3-in-1 XR/AR/VR glasses were your big tech purchase for the year, better connecting your Earthverse with your Metaverse life.

To plan for your upcoming work meeting, you check that your inter-virtual-world passport (IVP) is still valid since you'll be visiting the client's secure metaverse.

Ipsos Immersive3E Index Show the Diversity In Interest

Male
5.9 

Female
4.8 

Low Living Standard  **4.5**

High Living Standard  **6.1**

VR Device  **7.0**

Creator or Influencer  **7.4**

13-17  **5.8**

18-30  **5.5**

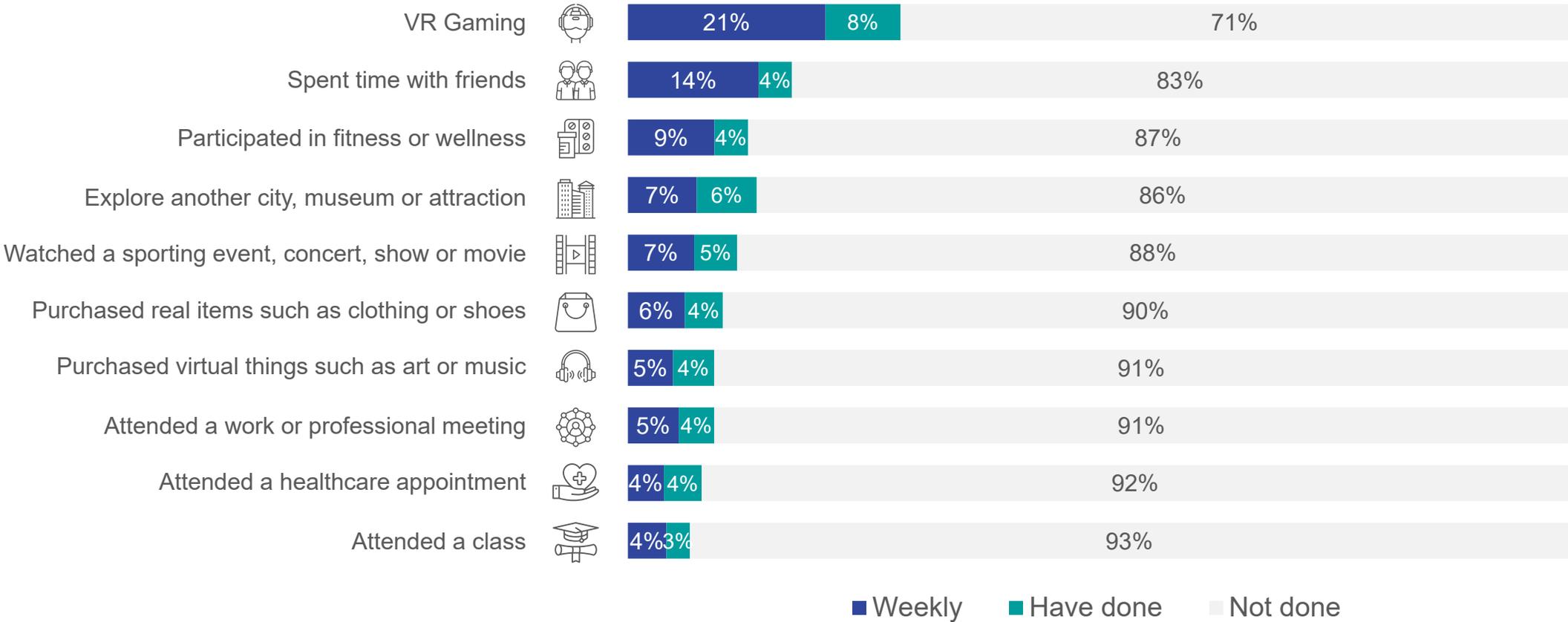
31-40  **5.8**

41-55  **4.7**

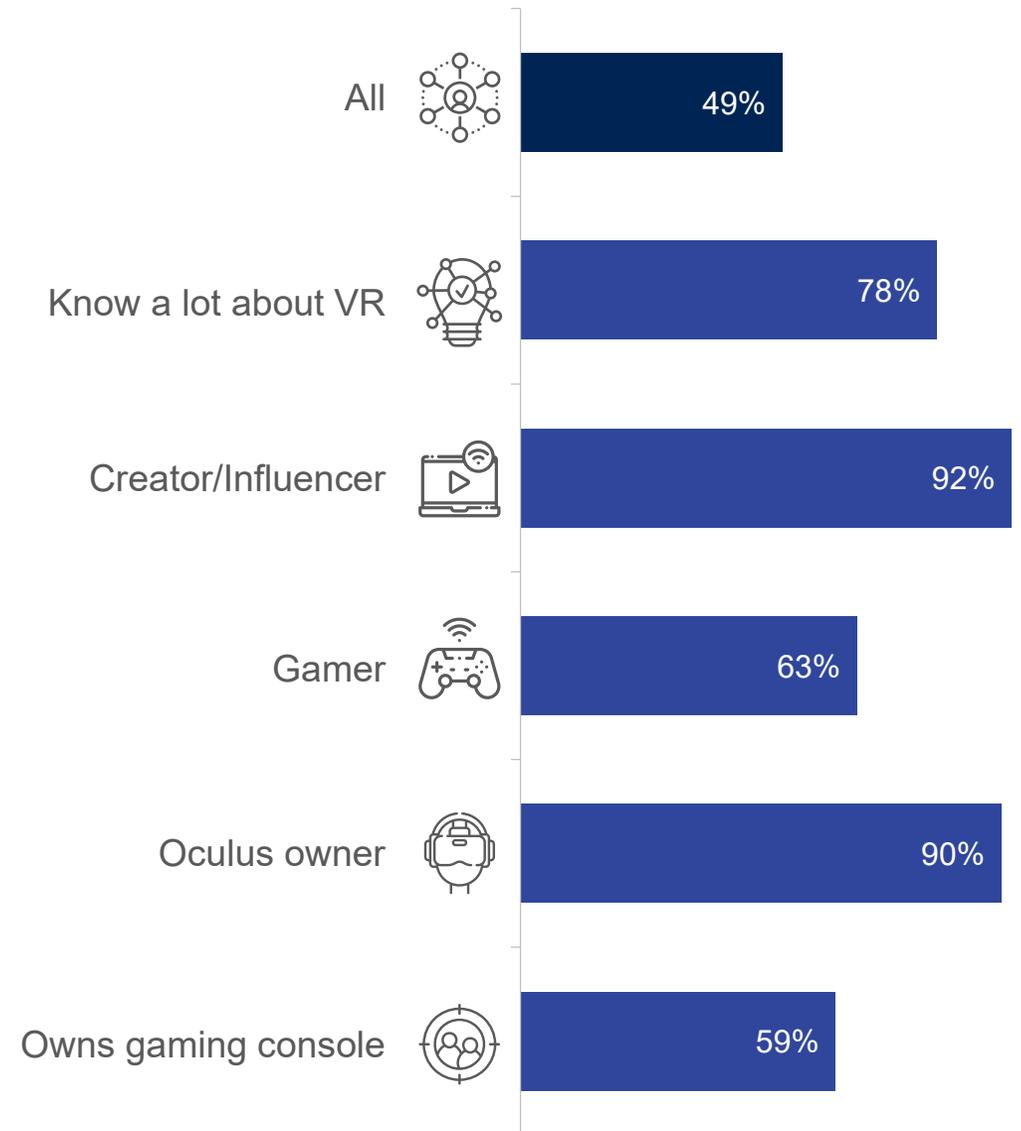
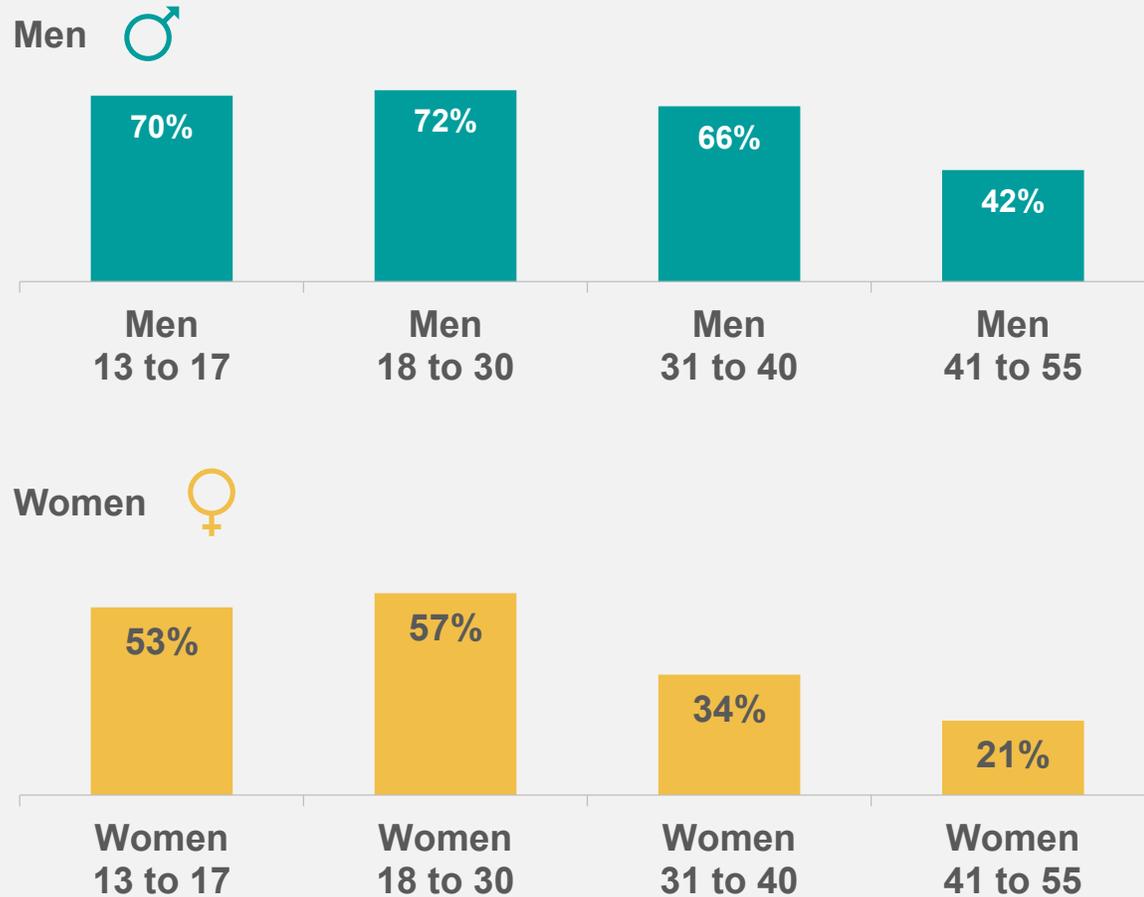


Current Actions of Your Audience: Virtual Reality

49% INDICATE SOME ACTIVITY WITH VR

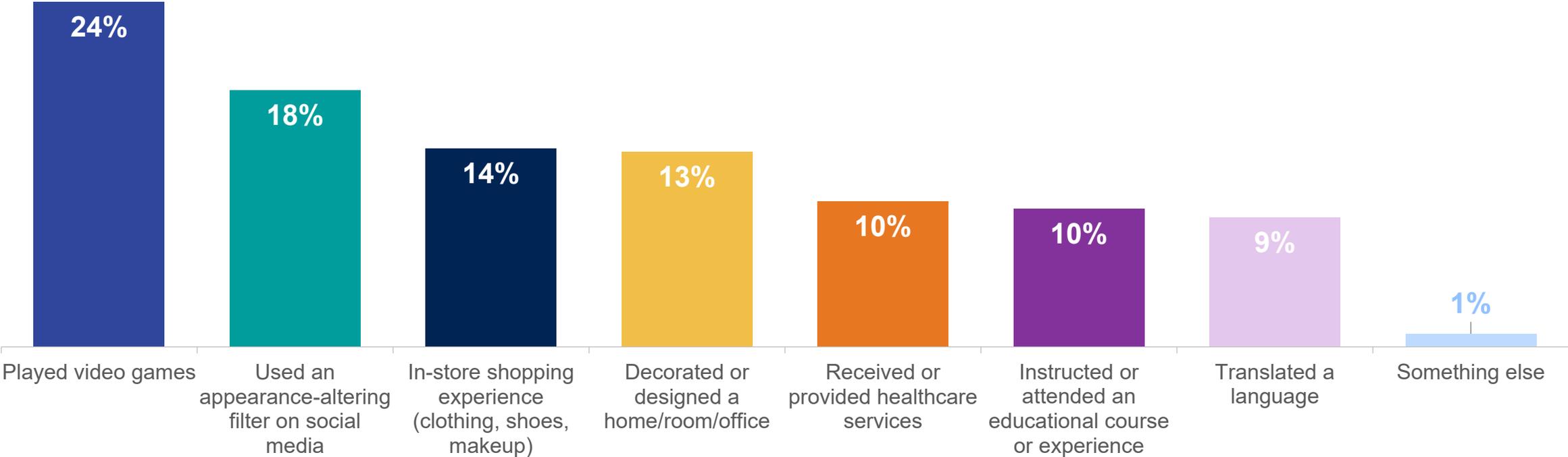


Who is active in VR?

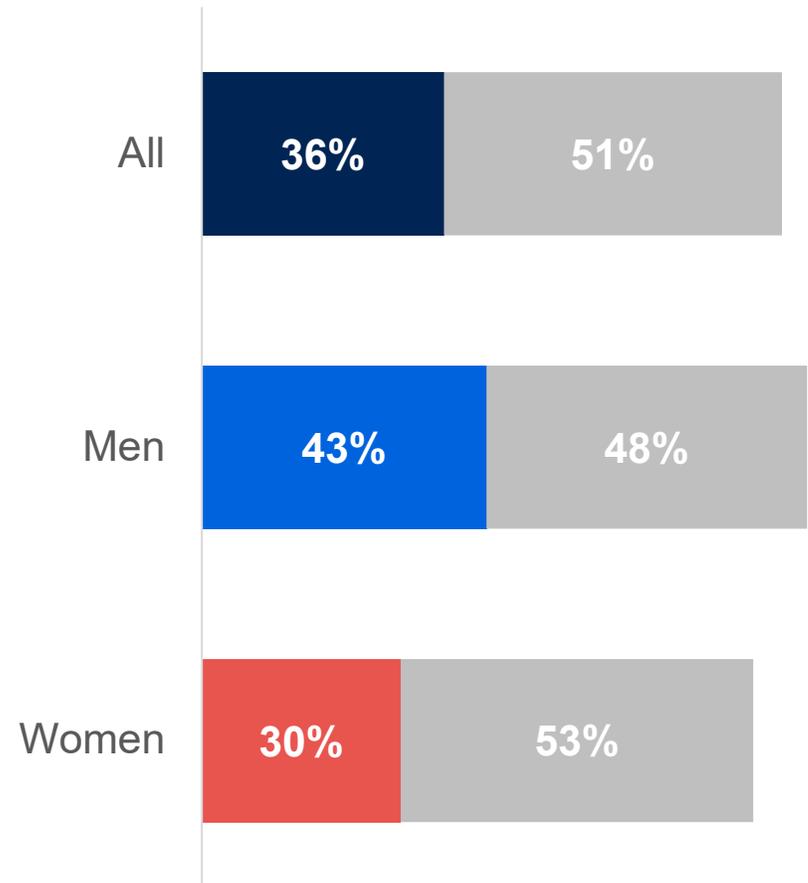


Current Actions of Your Audience: Augmented Reality

AND 45% INDICATE SOME ACTIVITY WITH AR



Most feel that they can create an avatar that reflects how they look



- Very satisfied with how I can create an avatar that represents who I am as a person
- Somewhat satisfied

45% have created an Avatar

66% among creators & influencers

77% have created more than one

For many teen gamers, gaming beats out TV...

I would rather watch someone else play video games than watch popular television shows



66%

13 to 17 Gamers

54%

13 to 17 Gamers



If my home was burning down and I could only save 3 items one of them would be my video games.



To move from aware to active, we need to ensure great UX

Have a clear purpose



Know what users need



Access will matter more in Immersive Experiences

Users want interoperability across their devices



Walled gardens will limit the reach of your experience



Aim to create immersive experiences that feel valuable, intuitive and seamless

Considerations:

Simpler but more reliable is key



Aim to strike a balance



Help users troubleshoot



Final Thoughts

3



Key Takeaways



Your Opportunities

Web3 is still in its infancy – Think the dotcom era of the late 90s – Our current envisioning of the potential of Web3 is still constrained by how we view the world of Web2 today

Brands and businesses need to think beyond the here and now to envision the potential of Web3... and take steps today to set yourself up for success in that era (and to also help hasten it)



Your Audience

Web3 and your audience are evolving at the same time

Yes, consumers have doubt, however, a majority are aware, and are already participating in various components of Web3

Tracking trends, attitudes, and behaviors will allow you to keep a pulse on your audience, their needs, and optimize your strategies



Your Experiences

Web3 will involve a far more complex interaction of devices and experiences

The experiences that win will be those that deliver a seamless, intuitive experience from onboarding to multi-user interactions

Testing with real users before launch will ensure you have removed the barriers to a great experience

Food for Thought and Questions to Consider



Understanding business opportunities

- HOW might Web3 evolve? What will be different and what will be the same?
- WHAT are the current and future opportunities for our brand? What are the future Jobs To Be Done?
- WHAT can we do today to prepare?



Understanding audiences

- WHO is your audience, and how do they vary based on interests, professions, age, etc.?
- WHO should you be targeting and creating experiences for based on the goals of your company?
- WHO is most likely to adopt your brand's integration into Web3, and what can we do for those that are reluctant?



Understanding creators

- HOW can we set up a sandbox to experiment?
- HOW will we make MPVs to quickly discover what works and what doesn't?
- HOW can you simplify the content creation process for the people you want to be engaged with your platform?

**THANK
YOU.**

