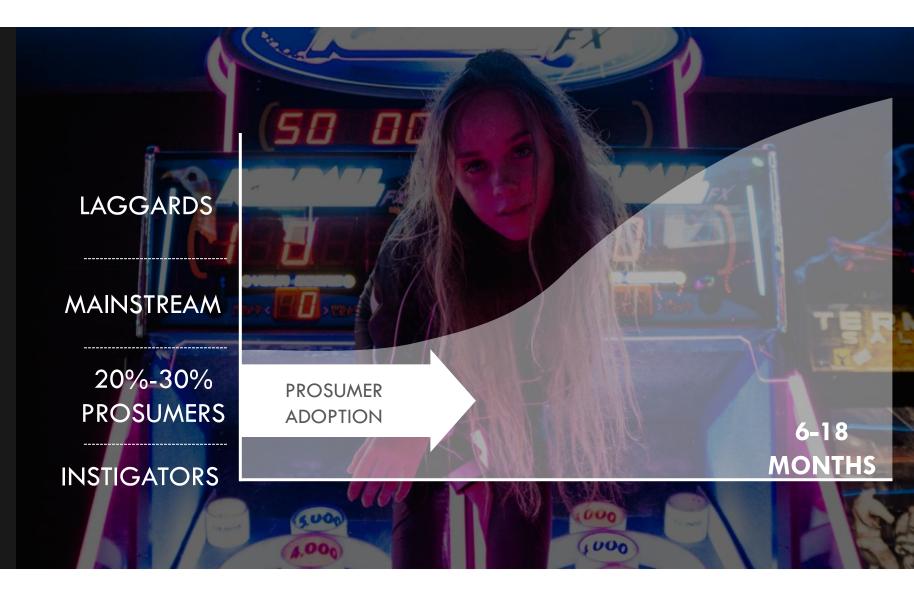


A GLOBAL STUDY





WHO ARE PROSUMERS?





WE'VE SEEN IT IN BUSINESS

\$800B

of revenue generated in the metaverse by 2024 (Bloomberg).

\$10B

Spendings by Meta on its Metaverse division this year.

\$8T

Investments in the metaverse by Chinese tech giants.

\$69B

Microsoft deal to buy Activision Blizzard.



WE'VE SEEN IT IN THE NEWS

Ehe New York Times

Everybody Into the

Metaverse! Virtual Reality

Beckons Big Tech.

EL PAÍS Qué es el metaverso y cómo invertir en él

ALJAZEERA

Facebook changes name to Meta to highlight virtual reality shift

the japan times

'New world order': Asia's virtual

influencers offer glimpse of metaverse future

Forbes

Can The Metaverse Provide Opportunities For Africa That Are Out Of This World?

FOLHA DE S.PAULO W
The Metaverse Is Here



POP CULTURE MADE IT **FAMILIAR**

59% PROSUMERS

32% **MAINSTREAM**

Science-fiction pop culture has prepared us to embrace technological innovations.

Overall



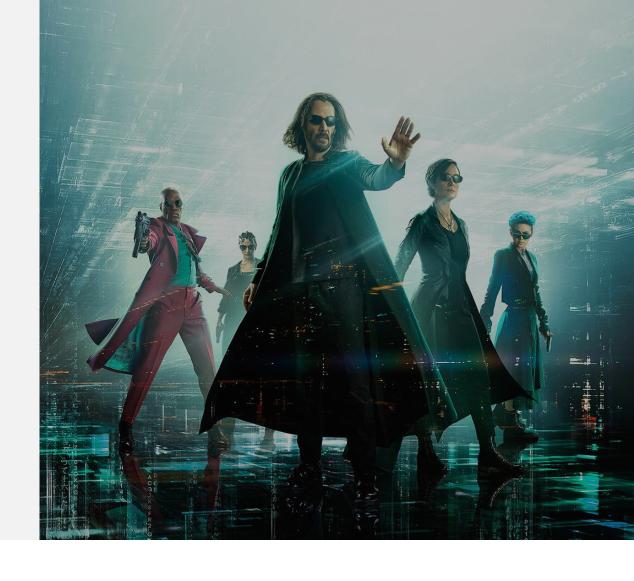












GAMING & CHILDREN HELPED THE ADOPTION

57%
PROSUMERS

41% MAINSTREAM

Have you or your children played or socialized in metaverses / gaming platforms such as Fortnite, Roblox, Minecraft, or Decentraland?









METAVERSE IS AT THE HEART OF ALL CONVERSATIONS

80% **PROSUMERS**

66% **MAINSTREAM**

Have you heard of metaverses / gaming platforms such as Fortnite, Roblox, Minecraft, or Decentraland?





88/63



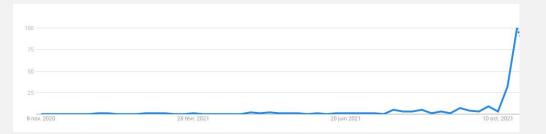
98/80

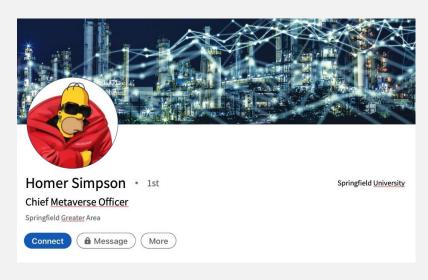


91/78

95/83









Overall

89% **PROSUMERS MAINSTREAM**

Have you heard of metaverses / gaming platforms such as Fortnite, Roblox, Minecraft, or Decentraland?

RU

Russia

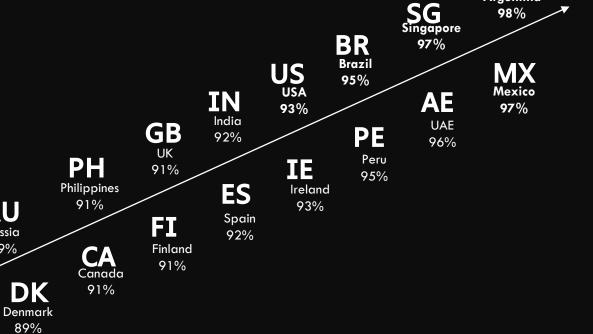
89%

89%

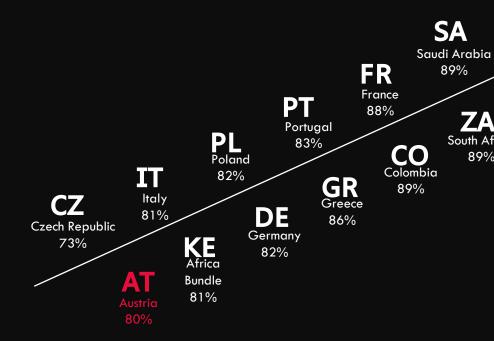
ZA

South Africa

89%



AR Argentina



FORGET VIRTUAL OR DIGITAL... THIS NEW WORLD IS FOR REAL — AT LEAST FOR THE REST OF THE WORLD

24% **PROSUMERS**

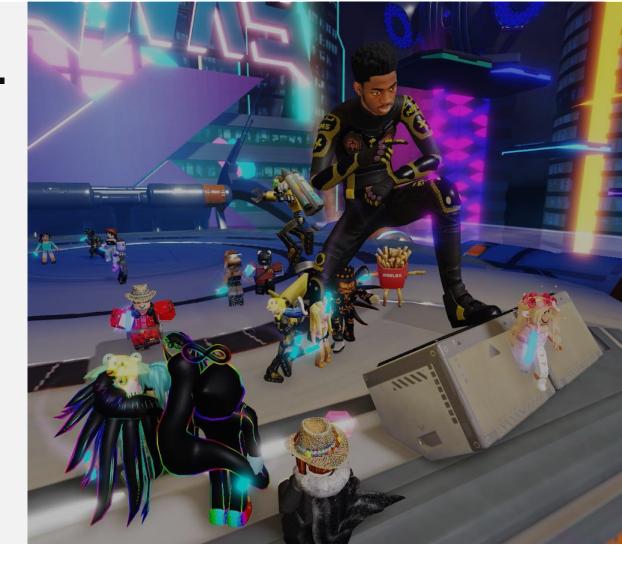
18% **MAINSTREAM**

Experiences that happen in the metaverse (e.g., making friends, attending a digital concert, throwing a digital party) are as real as physical experiences.

> Overall 61/37 66/31 45/22 95/74









DESIRE VS. FEAR

AT

PROSUMERS

41% **MAINSTREAM**

The metaverse is going to... Expand our scope of experiences.

Overall

74/48 73/44 75/46 74/51

56/40

AT

65% **PROSUMERS**

58% **MAINSTREAM**

I'm afraid that being immersed in the metaverse will kill our desire to go out and explore the physical world.

Overall









59/70 69/78 50/71

A GENERATIONAL FRACTURE

94% GEN-Z 30% BOOMERS

Have you heard of metaverses / gaming platforms such as Fortnite, Roblox, Minecraft, or Decentraland?

Overall 90/54



"Metaverse" will quickly become a 'boomer' term.

To Gen-Z, it is nothing new.

They've grown up hanging out in Minecraft, buying Fortnite skins, and forming their strongest friendships over digital platforms.

Why do they need a new term to define what is to them, just life?

Traduire le Tweet

11:13 PM \cdot 14 déc. 2021 \cdot Twitter Web App



META ANXIETY IS ALREADY HERE

45%
PROSUMERS

AT

40%
MAINSTREAM

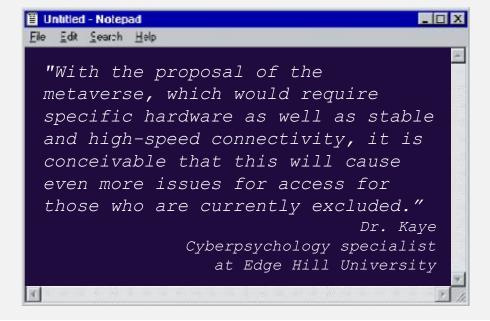
Metaverses will worsen the digital divide between those with access and skills and those without.



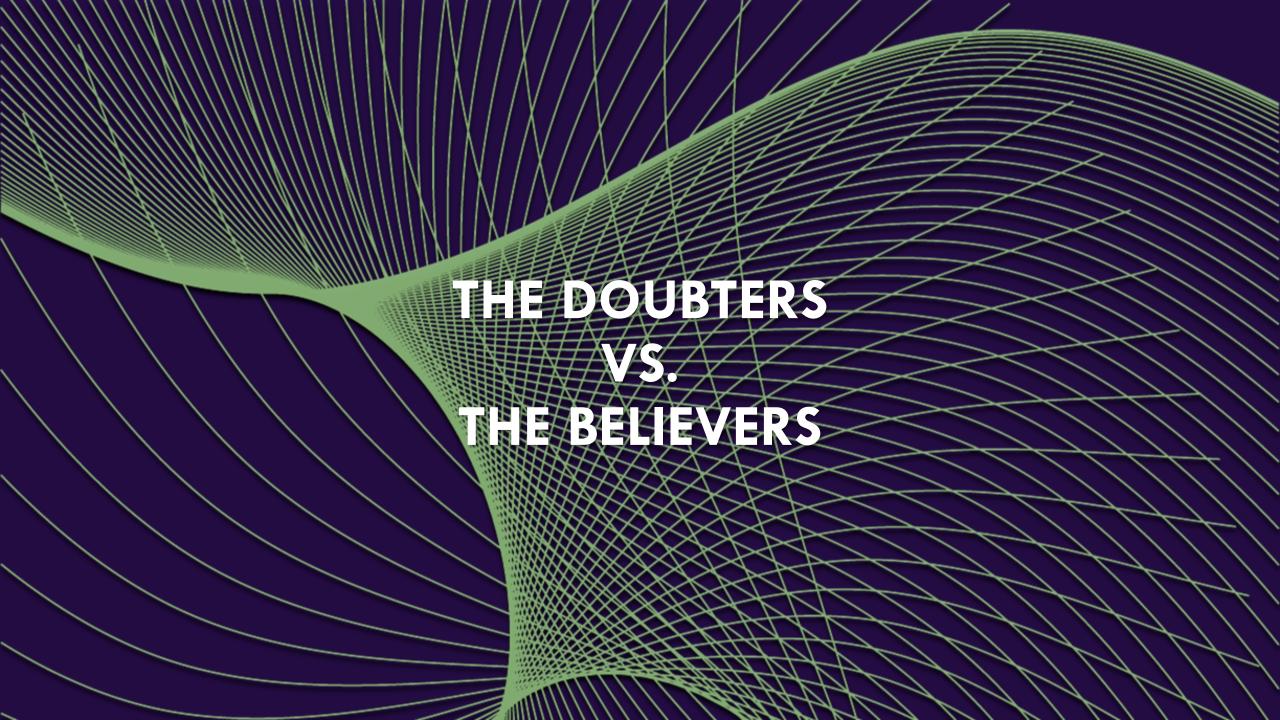
Lifewire

How the Metaverse Could Worsen the Digital Divide

Connecting the connected, but what about the rest?



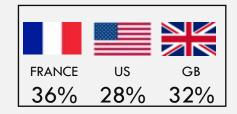




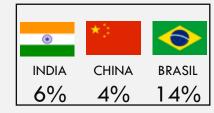
A "GEOPOLITICAL" FRACTURE

I do not believe metaverses / gaming platforms are the future of the internet.

THE DOUBTERS



THE BELIEVERS





FOR BOTH, IT'S AN EXPANSION OF OUR WORLD IN AUSTRÍA, WE STILL DOUBT IT

49% **PROSUMERS**

41% **MAINSTREAM**

FROM



The metaverse is going to... expand our scope of experiences.

TO

















FOR BOTH, IT'S A PLACE FOR EDUCATION

35% **PROSUMERS**

27% **MAINSTREAM**

What do you most expect from metaverse and immersive digital experiences? New ways to learn and gain skills.



Education in the Metaverse, by Meta.

















47/46 46/40 38/38 42/34 44/43 45/47 44/51

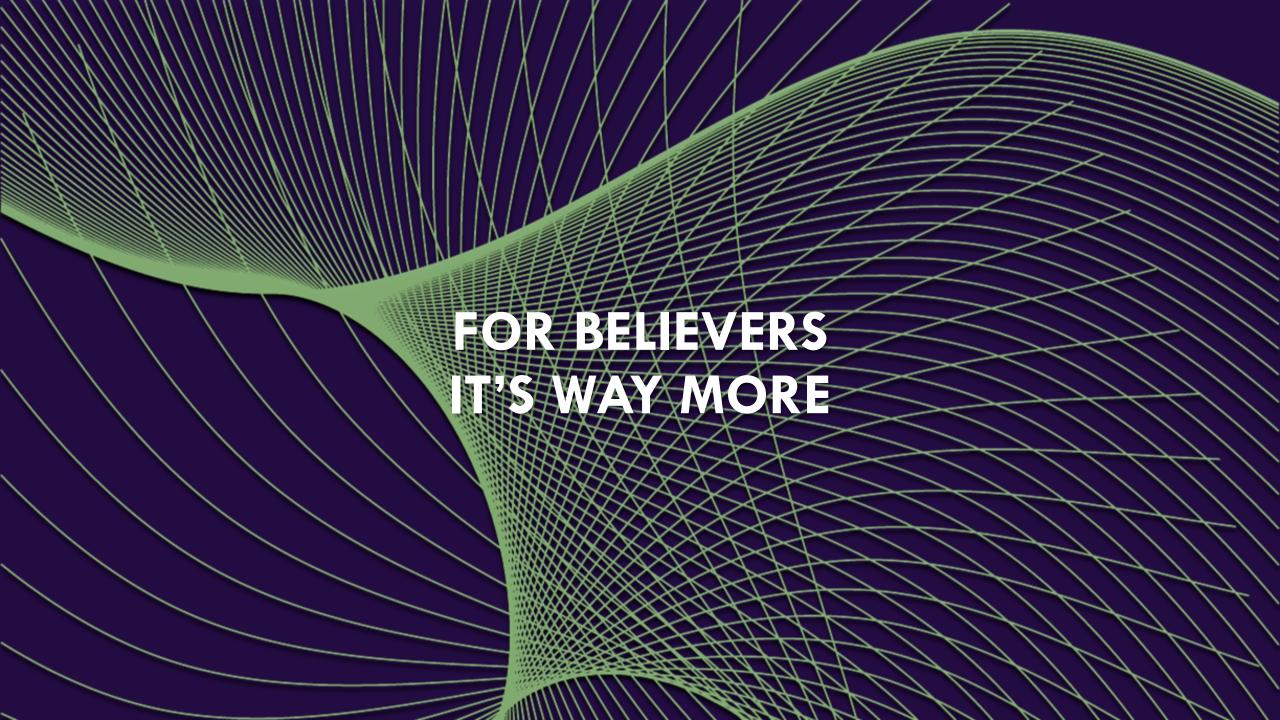
FOR AUSTRIANS, MOSTLY A PLACE OF ENTERTAINMENT

41% PROSUMERS 29% MAINSTREAM

What do you most expect from metaverse and immersive digital experiences? More intense entertainment.







IT'S A PLACE OF EXPERIMENTATION

37%
PROSUMERS

22% MAINSTREAM

What do you most expect from metaverse and immersive digital experiences? New ways to simulate experiences before they happen in the real world.



Hyundai Motor Vitalizes Future Mobility in Roblox Metaverse Space, Hyundai Mobility Adventure





WHERE YOU CAN GET RECOGNIZED

AT

8%
PROSUMERS

9% MAINSTREAM

I love spending time in the metaverse / on gaming platforms because they allow me to receive the recognition I don't get in real life.

Overall 38/18

19/9

*: 56/39

54/29

havas village

BELIEVERS ARE READY TO GO FULL THROTTLE — AUSTRIA ISN'T

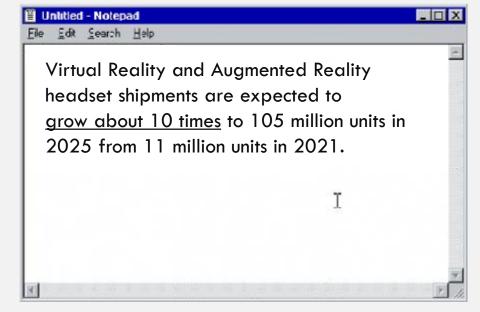
20%
PROSUMERS

15% MAINSTREAM

I would be willing to wear a virtual reality headset several hours a day to enjoy the full possibilities of the metaverse.

AT





Source: Counterpoint research



THE MORE YOU BELIEVE IN IT, THE MORE YOU FEAR BEING **LEFT ON THE SIDELINES**

AT

14% **PROSUMERS**

MAINSTREAM

I'm afraid of being excluded from metaverses because I lack digital skills.





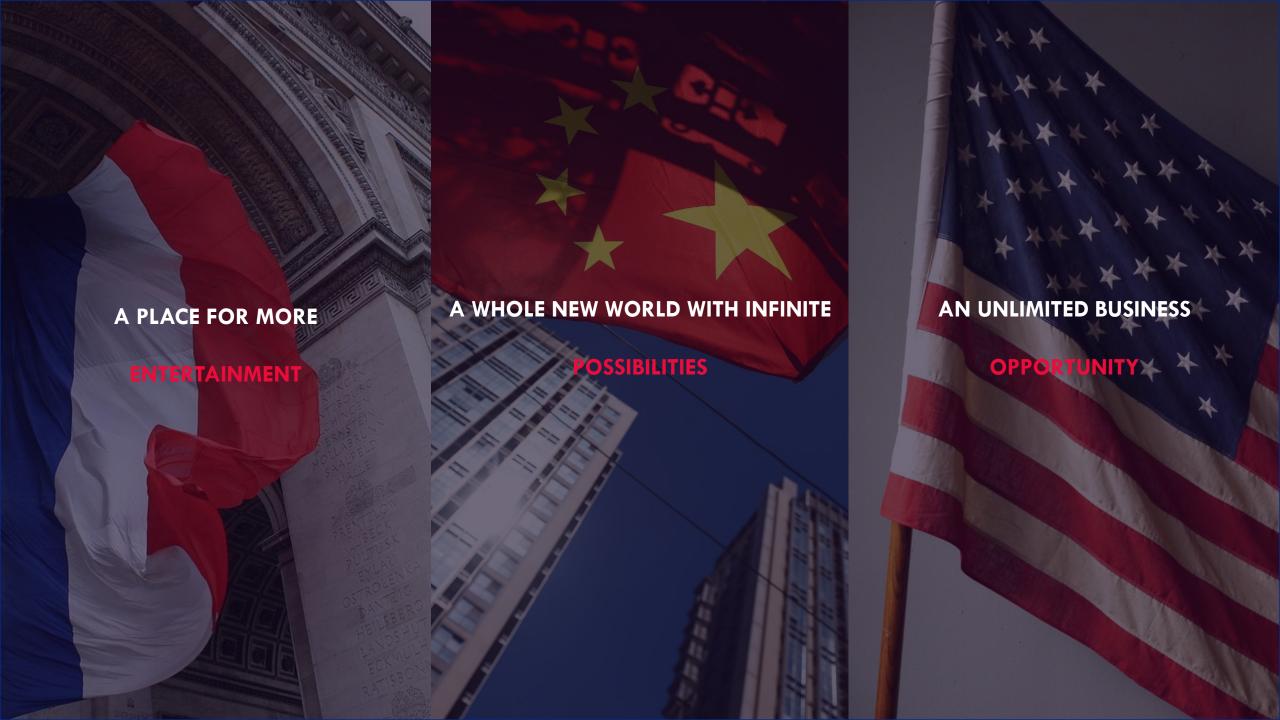


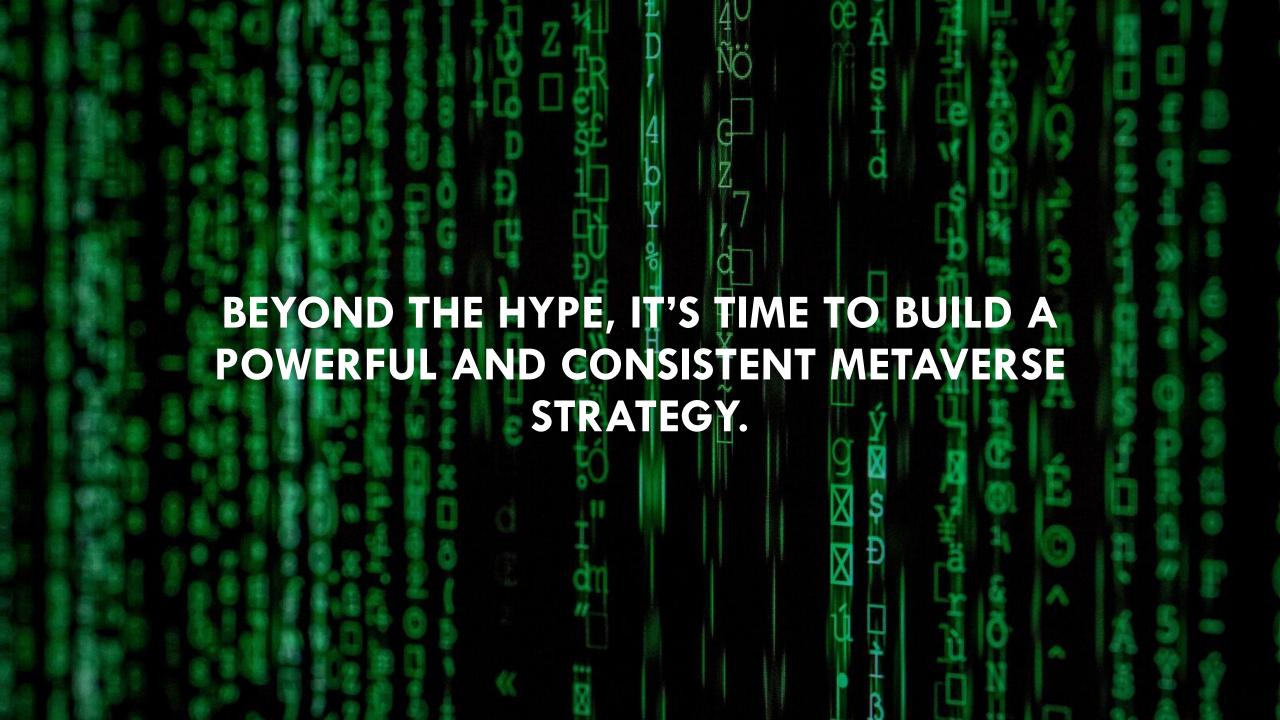




22/24 18/19 10/24 68/59















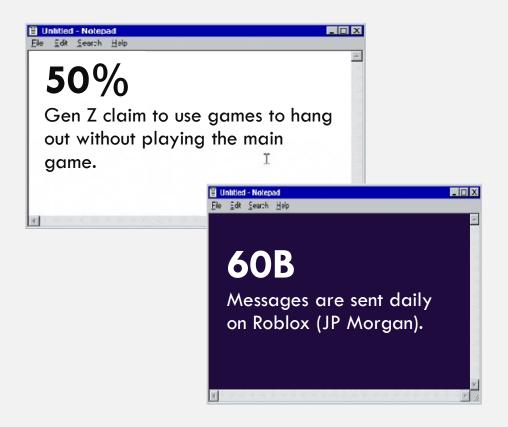
THE METAVERSE IS THE NEW SHOPPING MALL

29% PROSUMERS

23% MAINSTREAM

I love spending time in the metaverse / on gaming platforms because they allow me to socialize online with my "real life" friends.

Overall





IT'S ALSO A PLACE TO MEET NEW PEOPLE

AT

53%
PROSUMERS

43%
MAINSTREAM

I have felt lonelier during this pandemic than ever before.

AT

37%
PROSUMERS

20%
MAINSTREAM

I love spending time in the metaverse / on gaming platforms because they allow me to meet new people.

Overall

64/60

Overall





A BIG TENSION FOR CHILDREN

A place to develop new skills.



An uncharted territory that can be fearful.



A BIG TENSION FOR CHILDREN

A place to develop new skills.



An uncharted territory that can be fearful.

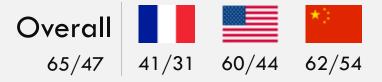


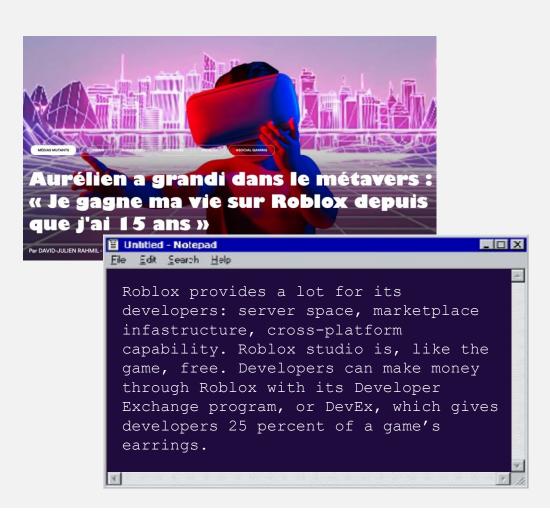
A PLACE TO LEARN NEW SKILLS

45%
PROSUMERS

29% MAINSTREAM

I think socializing in the metaverse /on gaming platforms is good for children because they can learn new things /develop new skills.







A PLAYGROUND FOR UNLIMITED CREATIVITY

43% PROSUMERS

25% MAINSTREAM

I think socializing in the metaverse / on gaming platforms is good for children because they can develop their creativity.

AT







A PLACE OF COLLABORATION

37% **PROSUMERS**

23% **MAINSTREAM**

I think socializing in the metaverse / on gaming platforms is good for children because they can collaborate with other people.













A BIG TENSION FOR CHILDREN

A place to develop new skills.



An uncharted territory that can be fearful.



THE FEAR OF ADDICTION

45% **PROSUMERS**

45% **MAINSTREAM**

I'm afraid children are spending too much time in the metaverse/on gaming platforms because they are becoming addicted to their screens.











REAL STUFF, REAL DANGER

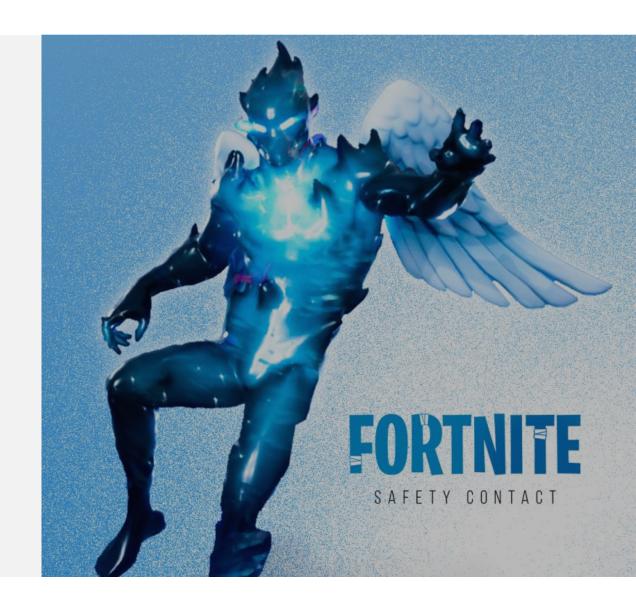
45% PROSUMERS

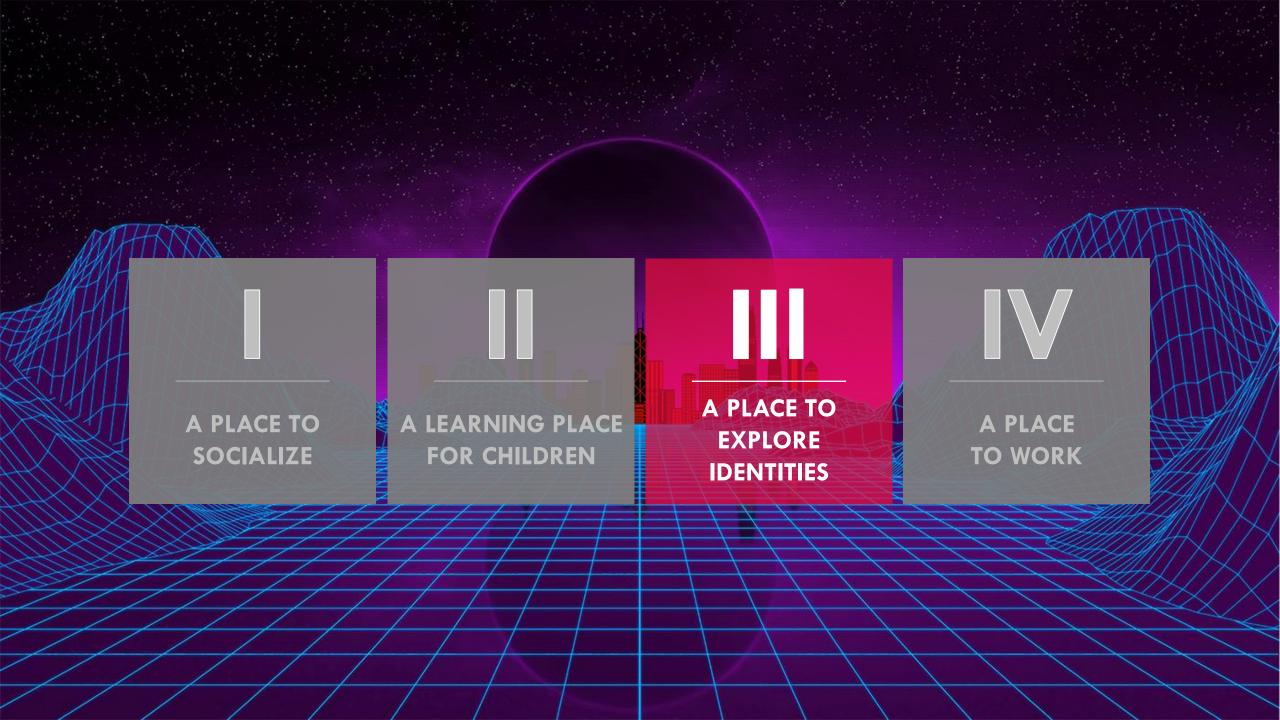
AT

45% MAINSTREAM

I'm afraid children are spending too much time in the metaverse / on gaming platforms because they could be facing real danger (extortion, harassment, abuse).

Overall





WE DON'T WANT TO HIDE BEHIND OUR AVATARS

6% **PROSUMERS** AT

MAINSTREAM

I enjoy socializing in metaverses because I can hide my real identity.



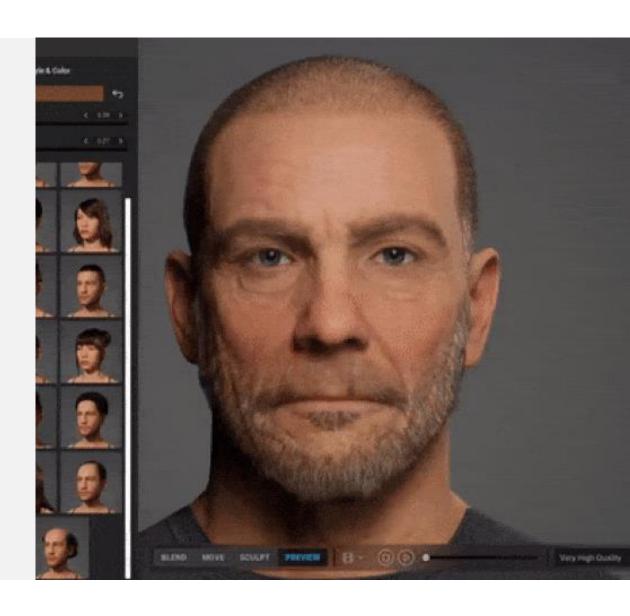








29/15



WE WANT TO BE TRUE TO OURSELVES

33% **PROSUMERS**

22% **MAINSTREAM**

I enjoy socializing in metaverses because I can be my true self.

Overall 55/36







49/24 65/35 59/51



OUR AVATARS ARE A SOURCE OF REINVENTION

31% **PROSUMERS**

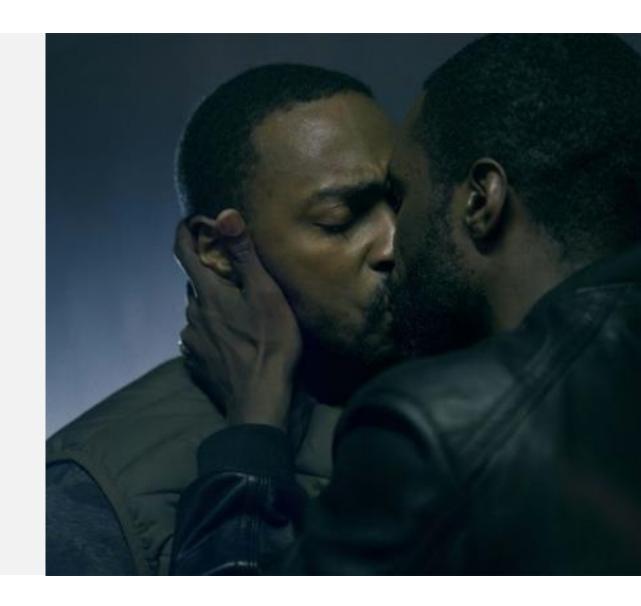
13% **MAINSTREAM**

I enjoy socializing in metaverses because I can invent a new identity.









INVENTING A MORE INCLUSIVE PLACE

57%
PROSUMERS

33% MAINSTREAM

Metaverses are more inclusive (of races, genders, identities, etc.) than real-life spaces.













INVENTING A MORE INCLUSIVE PLACE

NON-FUNGIBLE PEOPLE









WE HOPE PEOPLE WILL HAVE THE POWER



64% MAINSTREAM 68% GEN-Z

56% BOOMERS

Metaverses should be commonly owned public properties.

Metaverses should be commonly owned public properties.

AT



27/33







33/32 46/37 46/40

Overall

50/32



BUT WE FEAR THE OLD MASTERS WILL TAKE CONTROL

24% 12% NAINSTREAM

I'm worried that the future of the metaverse is owned by private companies like Facebook (now known as Meta).





SOME WILL THEN CALL FOR GOVERNMENT CONTROL

14% 24% PROSUMERS AT

Metaverses should be regulated by governmental bodies.



GOVERNMENTS COULD ACT AS "WATCHDOGS"

39% 35% MAINSTREAM

I think it's a good thing for governments to limit the time one spends in the metaverse.



REGULATING REAL CRIMINAL BEHAVIORS



Criminal behaviors in the metaverse should be regulated/punished the way they are in real life.

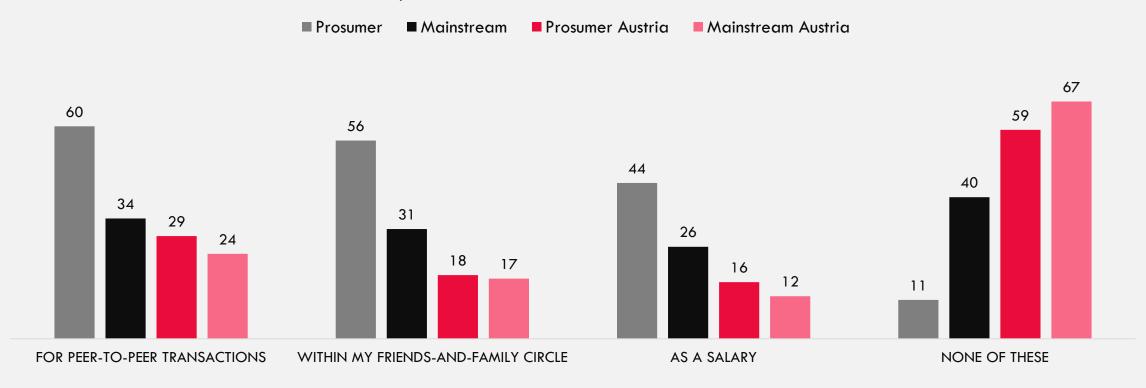






CRYPTOS ARE BECOMING MAINSTREAM

IN THE FUTURE, I WOULD ACCEPT BEING PAID IN CRYPTOCURRENCY



ENTERTAINMENT WILL BE VIRTUELL

37%
PROSUMERS

18%
MAINSTREAM

I would be willing to spend my money on buying a ticket for a digital concert or event.

Overall 61/37

The Sandbox and Warner Music Group to create music-themed LAND

The subsidiary of Animoca Brands and the global music company open their doors to a new arena for musical entertainment in the metaverse.





SELLING THE META-SUNSET

22%PROSUMERS

AT

9% MAINSTREAM

I would be willing to spend my money on digital property (e.g., land or a house in the metaverse).

Overall

43/22

12K\$

The average price of a parcel of virtual land doubled in 6 months in 2021.

318M\$

The amount of money people have already spent on virtual real estate.



FROM DIRECT-TO-CONSUMERS TO DIRECT-TO-AVATAR

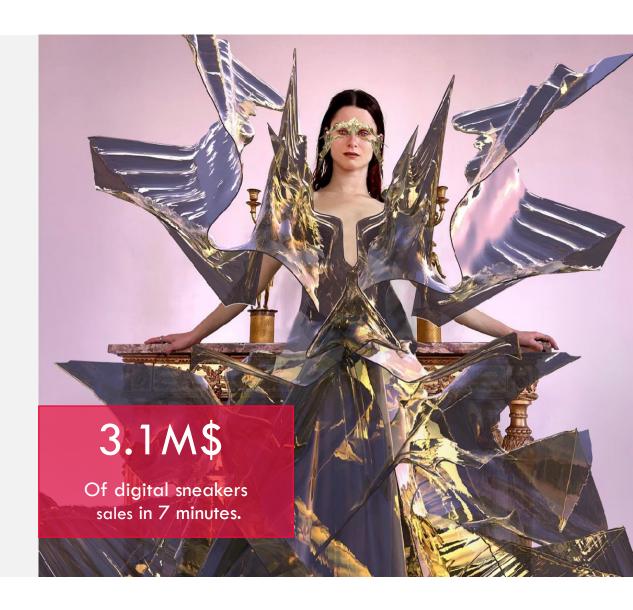
20%PROSUMERS

15% MAINSTREAM

I would be willing to spend my money on digital clothes to dress my avatar.

Overall

39/18



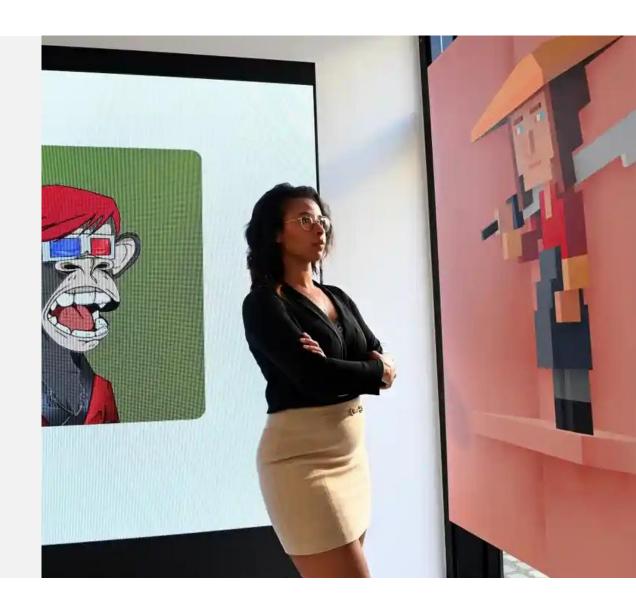
NFTS ARE ON THE INVESTMENT HYPE

41%
PROSUMERS

24% MAINSTREAM

I don't understand how non-fungible tokens (NFTs) and cryptocurrency work, but they seem like a good investment.





EVERYONE WANTS TO BE AN ART BUYER

84% **PROSUMERS**

94% **MAINSTREAM**

I would you be willing to pay less than \$1,000 for digital art (a piece of art that only exists on the internet)?

Overall 69/86





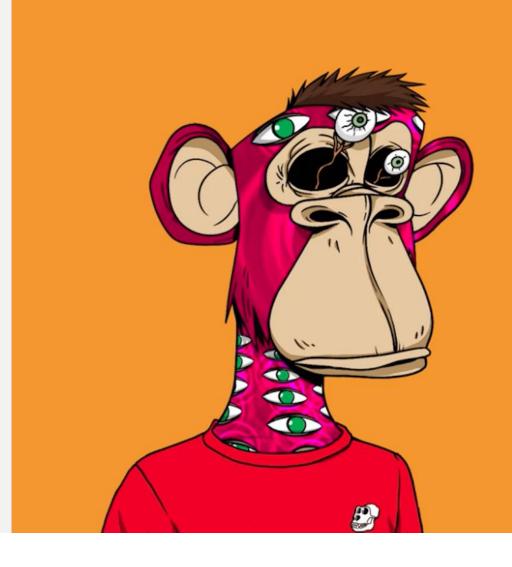








61/60







BY CREATING EXCLUSIVE CONTENT

35% **PROSUMERS**

18% **MAINSTREAM**

I think brands can add value in the metaverse / on gaming platforms by creating exclusive content.











47/31

46/24 60/31 47/37



BY SELLING EXCLUSIVE ITEMS

39% PROSUMERS

AT

24% MAINSTREAM

I think brands can add value in the metaverse/on gaming platforms by selling exclusive items/products that are only available there.



How Adidas Made \$23 Million From Its First NFT Drop

Adidas has hopped on the metaverse bandwagon in style with its first NFT drop, raking in over \$23 million in profits. Here's what this is all about.





BRANDS COULD BECOME "EXTENDED LIFE" PROVIDERS

33%
PROSUMERS

17%
MAINSTREAM

I think brands can add value in the metaverse/on gaming platforms by expanding the game length experience.

AT



Overall

38/22



EXTENDED REALITY, **EXTENDED LOYALTY**

84% **PROSUMERS**

94% **MAINSTREAM**

I think brands can add value in the metaverse/on gaming platforms by rewarding my engagement.

Overall Services 52/35 47/26 55/29 48/39 52/36 64/43



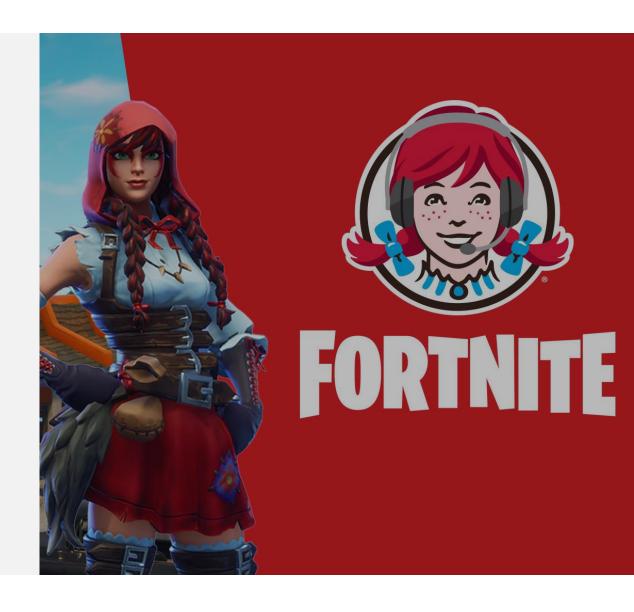












INVENTING A GIVE-AND-TAKE RELATIONSHIP

35% **PROSUMERS**

30% **MAINSTREAM**

I think brands can add value in the metaverse/on gaming platforms by rewarding my achievements with real money or free products.



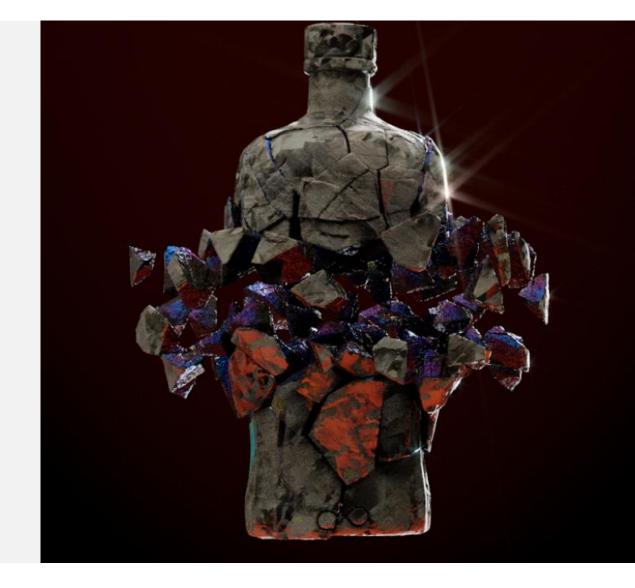








59/45 47/28 61/44 49/36 59/39 68/55



NFTS COULD BE THE FUTURE OF **CUSTOMER RELATIONSHIPS**

41% **PROSUMERS**

24%

MAINSTREAM

I would like brands to reward my loyalty by giving me nonfungible tokens that represent a share in their company.















94/82



IN A NUTSHELL

- 1. Will desire win over fears?
- 2. How will we overcome generational and geopolitical fractures?
- 3. How will we go beyond entertainment and gain new skills as education, creativity, building new things and collaborations?
- 4. A world of big money, a world that calls for regulation.
- 5. It's a decentralized and monetized world where brands are invited to play, but they must follow certain rules.



THE SENSORIAL

QUESTION

THE

SUSTAINABILITY

QUESTION

THE FRONTIERS

QUESTION

THE SENSORIAL QUESTION

37% 20% PROSUMERS AT

I will spend more time in the metaverse once it is fully connected to my senses (smell, touch, sight, taste).

Overall 63/35



THE SUSTAIN-ABILITY QUESTION

49% 62% MAINSTREAM

I'm afraid the metaverse will have an ecological cost we can't afford.

Overall 29/50



THE FRONTIERS QUESTION



I'm afraid the boundaries between the metaverse and the real world will become too blurred.

Overall 52/61



