

DISSECTING THE

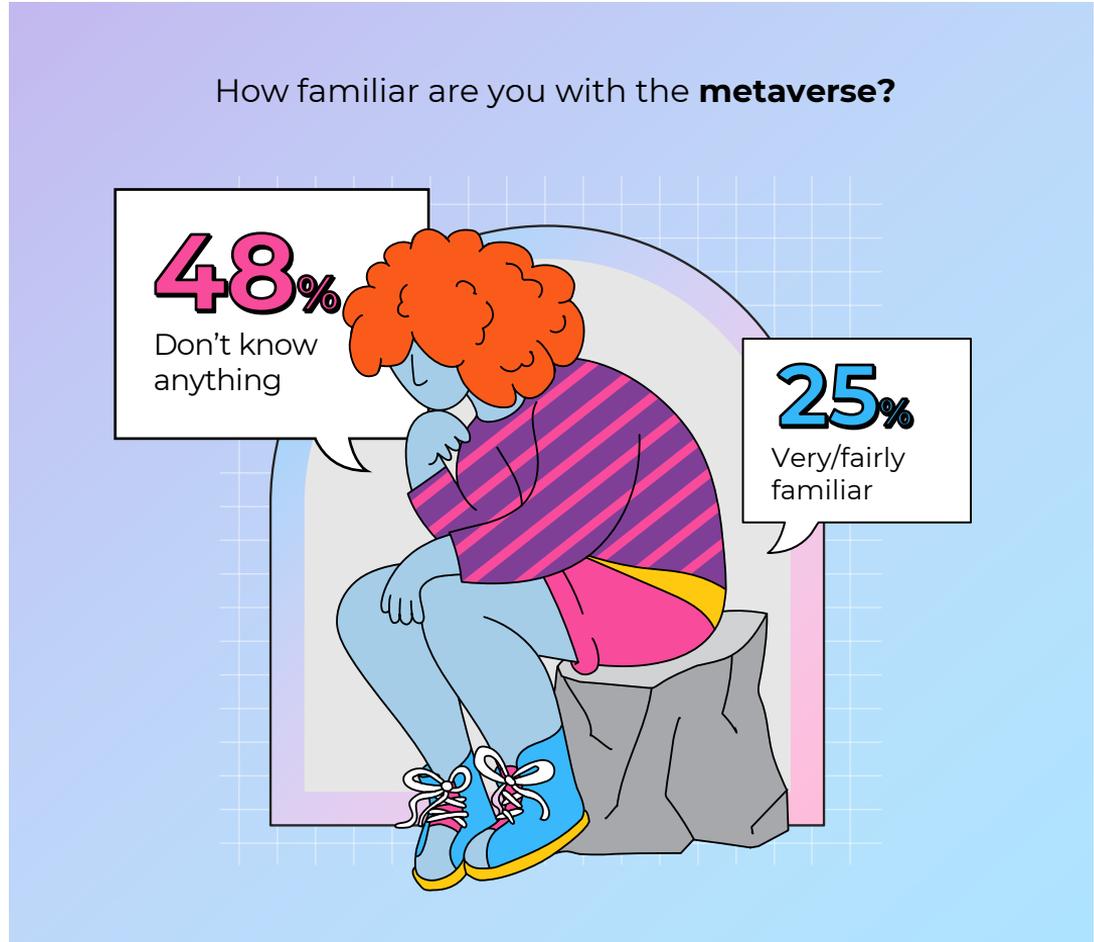
# METAVVERSE

METAVERSE GATEWAYS		Avatar & Identity		User Interface & Immersion		Economy	
Centralized		Decentralized		Social		Pay-to-Earn & Pay-to-Collect	
Player-first Content (UGC Rich)							
INFRASTRUCTURE							
Cloud, Scalability, & Hosting			Visualization & Digital Twin			AI	
Decentralized Infra			Adtech & Marketing			Connectivity	

# META



The problem with consumer research on the metaverse is that consumers **THINK** they don't know anything about the metaverse



**These technological definitions are confusing and scary to the consumer**



**1/2**

Fear that it will lead to the neglect of their physical surroundings and lose pre-existing relationships and the inability to form new ones\*



**1/3**

Doesn't think the metaverse will happen in their lifetime

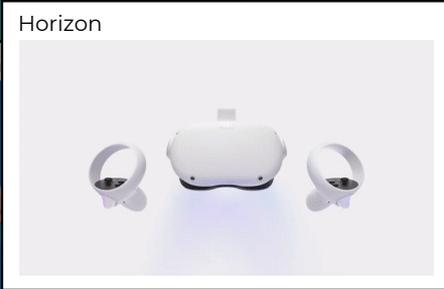
Kind of like how  
this crew was  
when discussing  
the internet in

**1994**





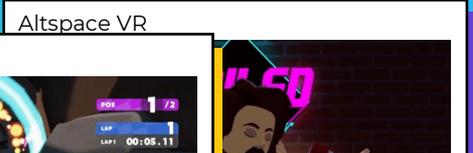
World of Warcraft



Horizon



blankos



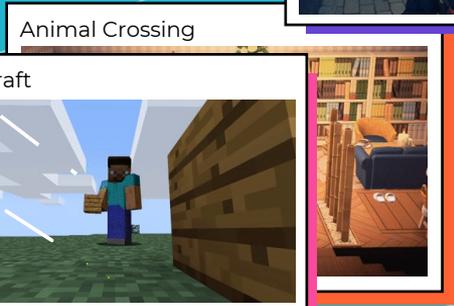
Altspace VR



Call of duty



Roblox



Animal Crossing



Minecraft



League of legends

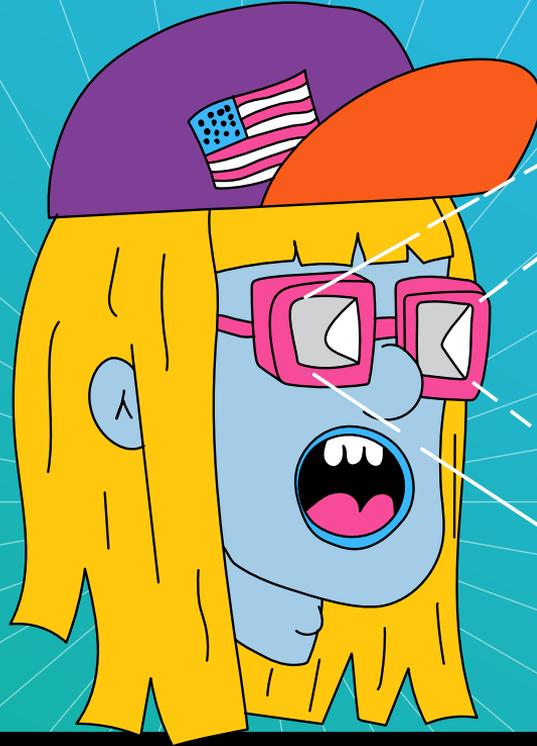
Experience Is Already Fairly High For Metaverse-Like Environments

**2/3**

(68%) of  
Americans 13-56

**3/4**

(78%) of American  
Men 13-56

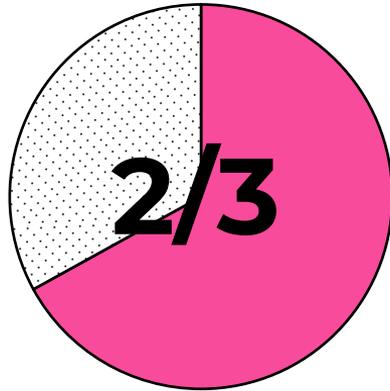


**9/10**

(88%) of Gen Z  
13-25

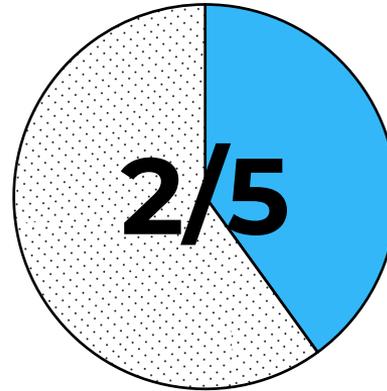
Have visited metaverse-like environments...

# Self-Actualization is Going Meta and Creating A Generation of Digital Latchkey Kids



IRL Friendships

**My parents know more about who my friends are in school** than they do about the friends I've made in virtual world games



Virtual Friendships

The friends I hang out with while gaming (in virtual world games) **are my closest**

# Self-Actualization is Going Meta and Creating A Generation of Digital Latchkey Kids

1/2

I feel **more comfortable expressing myself in digital games/environments** than I do at school



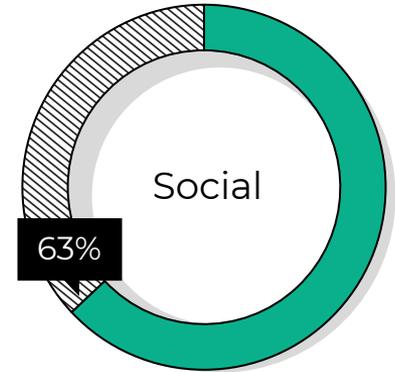
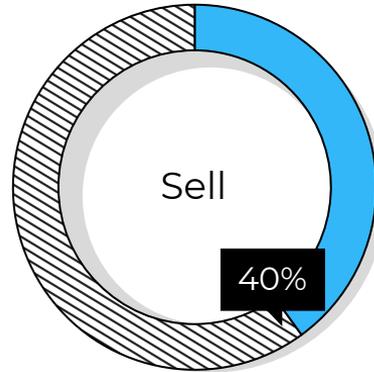
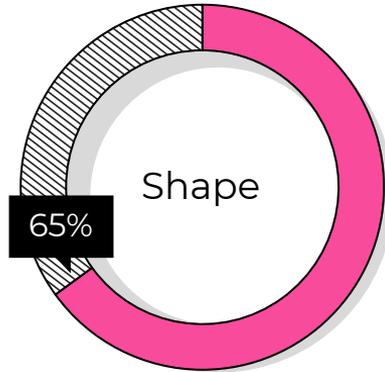
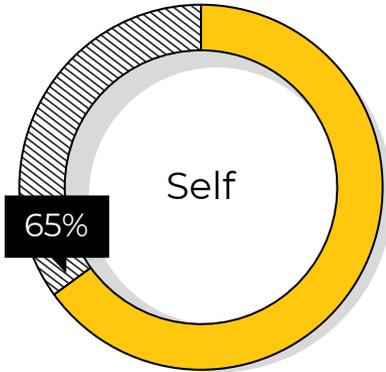
1/2

The person I get to be in the gaming environments I play is **more like the real me** than who I am with my family, or who I am at school.

Personal Development

# Which consumers have already taken advantage of

Have already done this in a meta-verse like environment



# Which consumers have already taken advantage of

Have already done this in a meta-verse like environment



<sup>1</sup> who are playing from different locations / <sup>2</sup> e.g., concerts, special events, etc



When we talk about building the metaverse,  
it's not a conversation about how we are

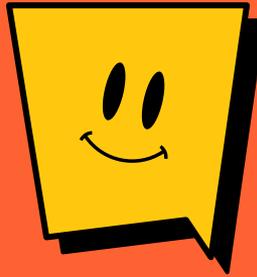
**LITERALLY**

Going to build it, but how

**metaPHORICALLY**

We will build it

PROBLEM

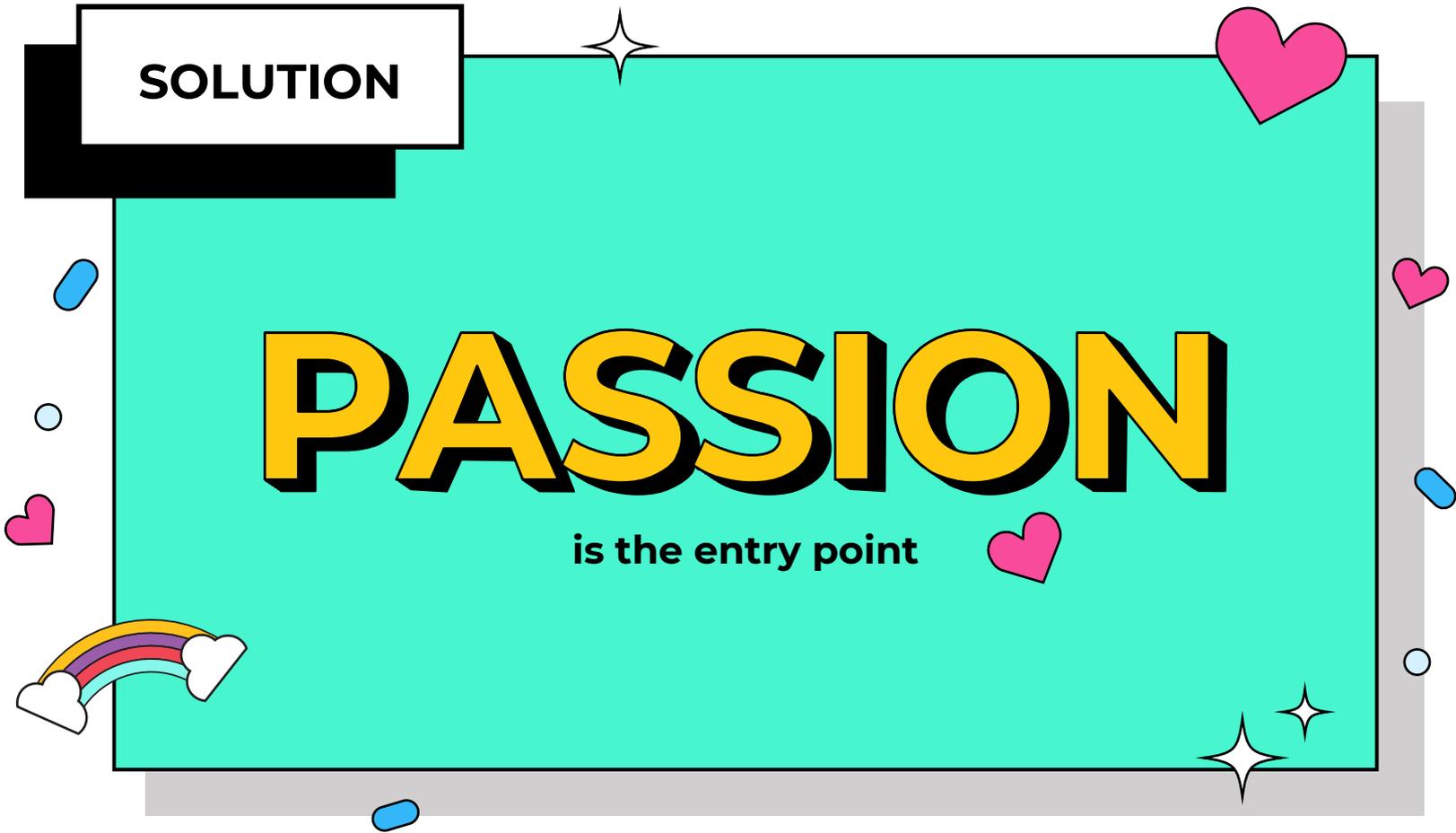


**1/3** say there is **nothing**  
to do in the Metaverse

**SOLUTION**

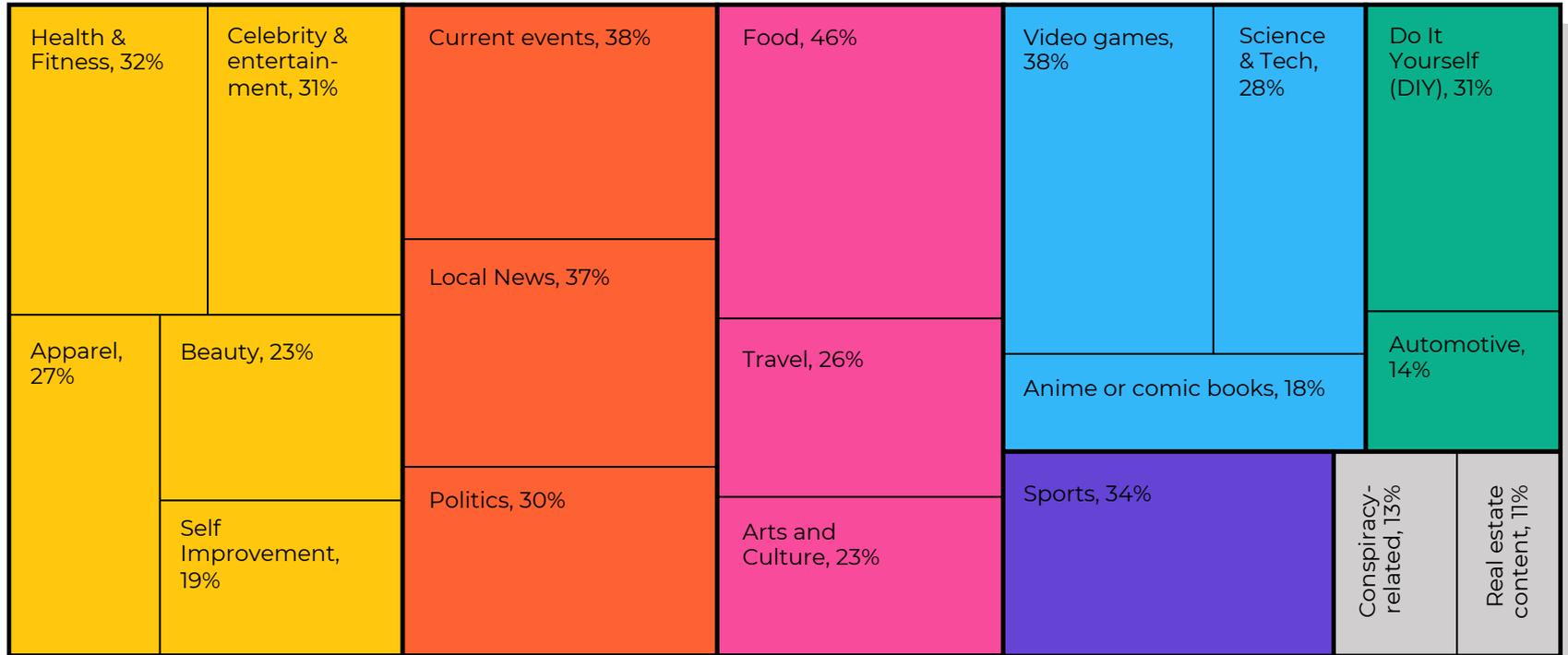
**PASSION**

is the entry point



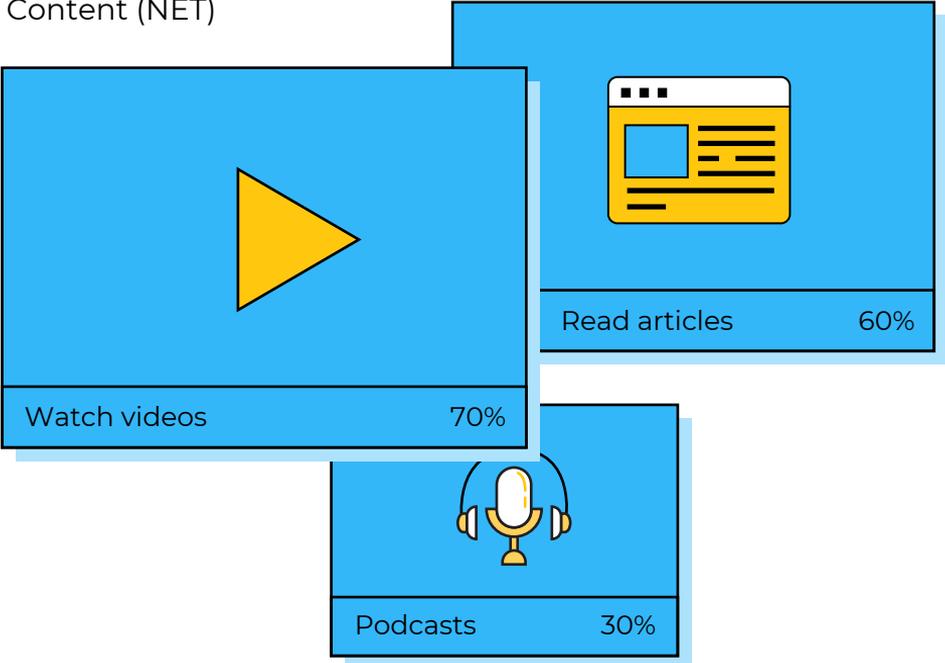
# The metaPHORICAL building blocks of the metaverse are our passion-points

Topics I follow and keep up with online regularly

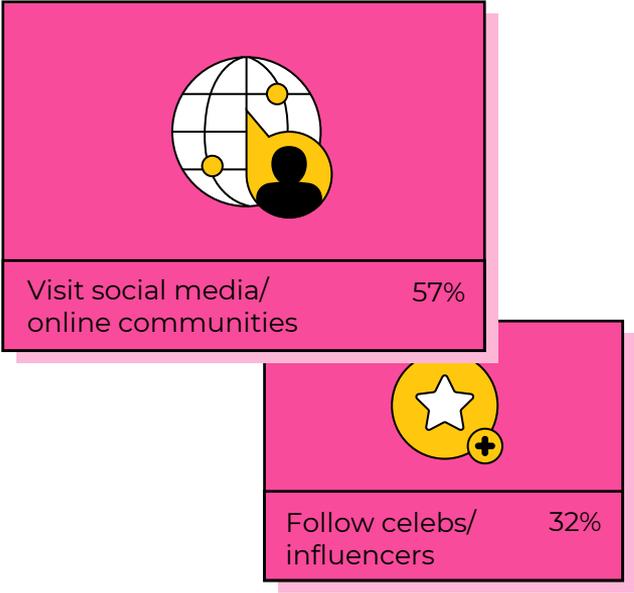


# Generally speaking, we activate passions around content and social in a 2d way

## Content (NET)



## Social (NET)



# Passion points will be the entry point to the metaverse for many consumers

**66%**

of consumers who visit metaverse-like environments go to engage with a community around a favorite passion

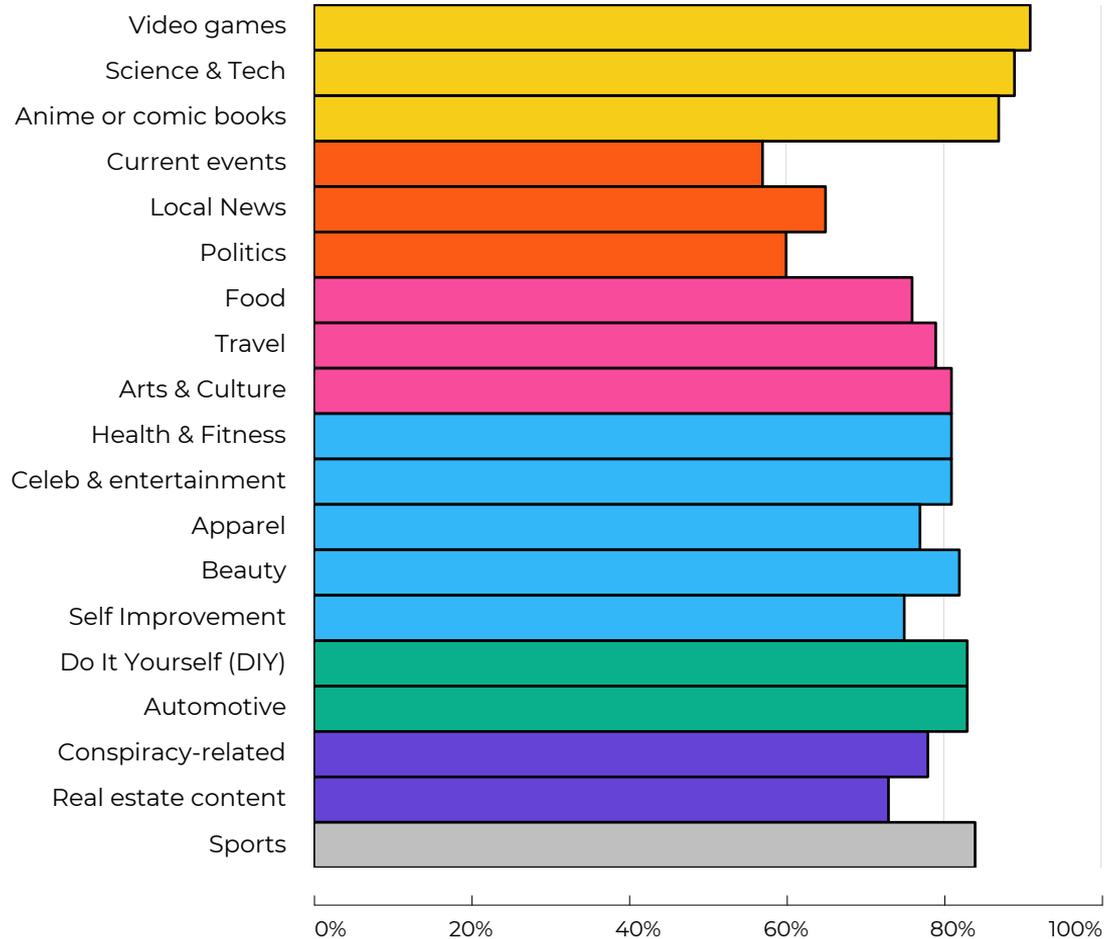


**50%**

of consumers believe the metaverse will make engaging with content related to passions, interests or hobbies better

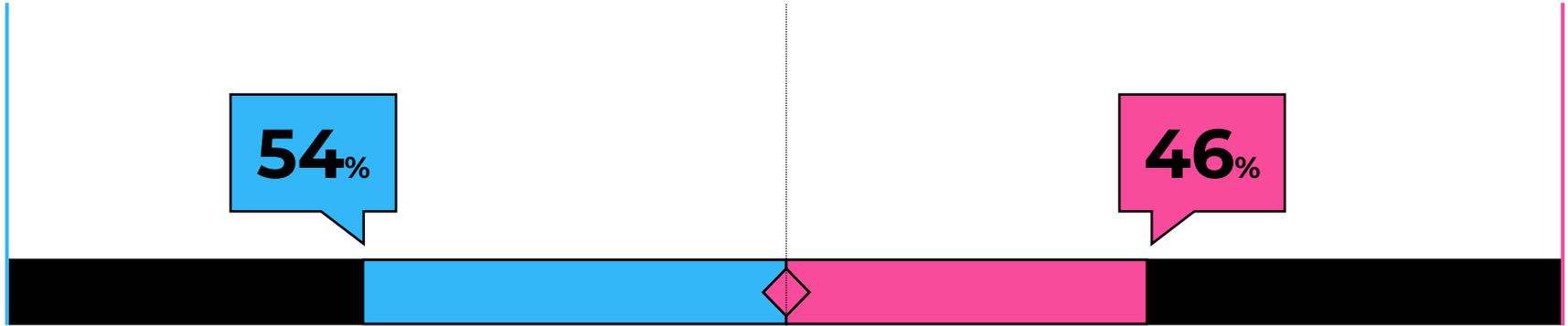
# The metaverse has an opportunity to enhance our engagement with our passions

How interested would you be in a metaverse that was centered entirely around your interests...?



# Shared interests serve as a fertile foundation for friendships

If you had to choose one, which statement do you feel is more true for you?



**I make new friends**

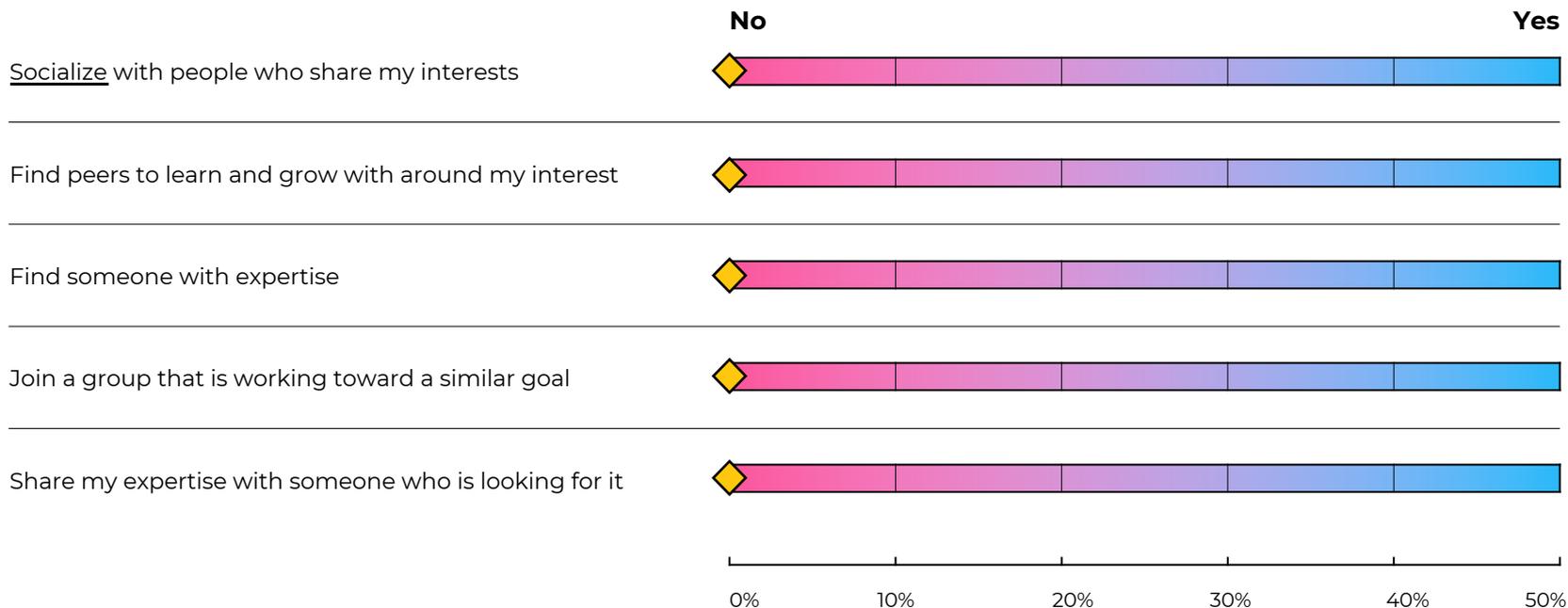
with people who share my interests

**I develop new interests**

through people who are my friends

# Shared interests serve as a fertile foundation for friendships

Which statements best describe what you would look to do in metaverses/virtual worlds built around your interests?



# PROBLEM

**3/5**

are more **interested in entertainment that doesn't exist** in the metaverse

**1/3**

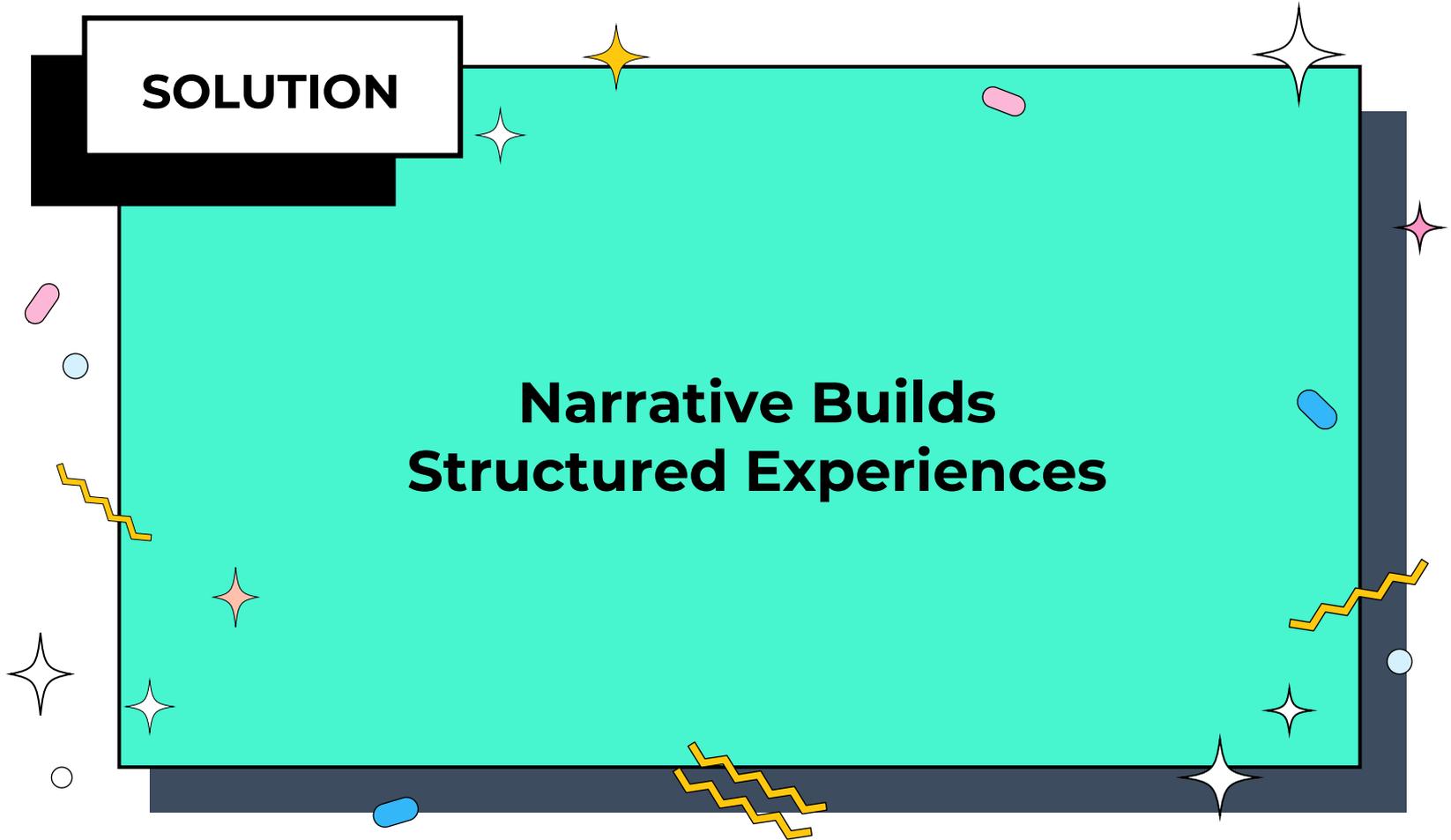
say that the **content is boring**

A photograph of the Golden Gate Bridge in San Francisco, California. The bridge's iconic orange-red towers and suspension cables are prominent in the foreground and middle ground. In the background, the San Francisco city skyline is visible across the water, featuring various skyscrapers under a blue sky with scattered white clouds. The water in the foreground is calm, reflecting the bridge and the city.

“the metaverse”

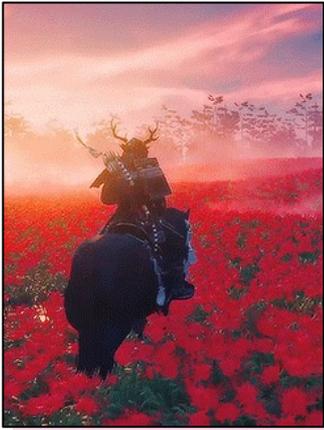
**SOLUTION**

**Narrative Builds  
Structured Experiences**



# Familiar narratives from franchises will help create the structure

Interest in entertainment themed metaverses...



Videogame ..... 76%



Anime ..... 71%



Movie ..... 64%



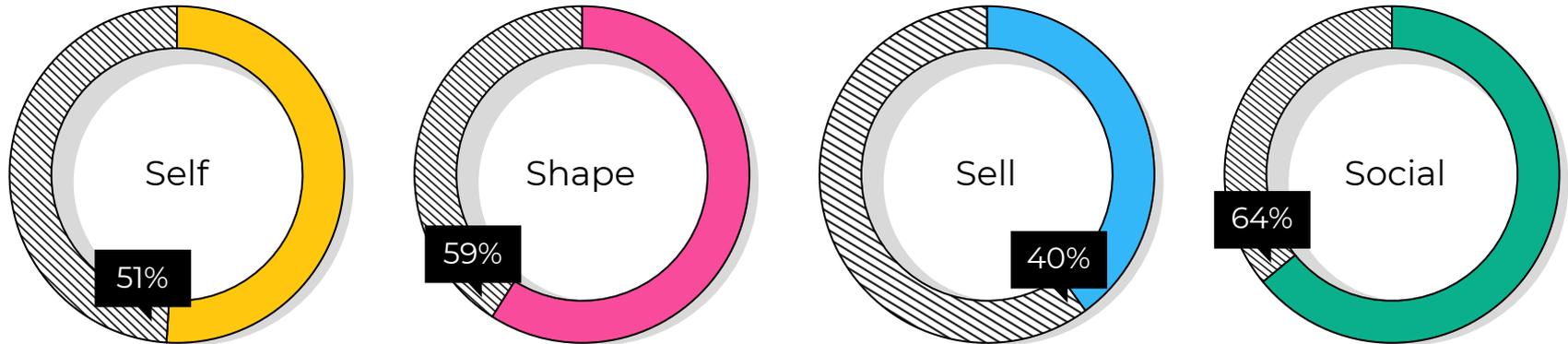
Comic Book ..... 64%



Book ..... 57%



# Built-in characters and storylines from franchise IP provide scalable experiences around our need-states

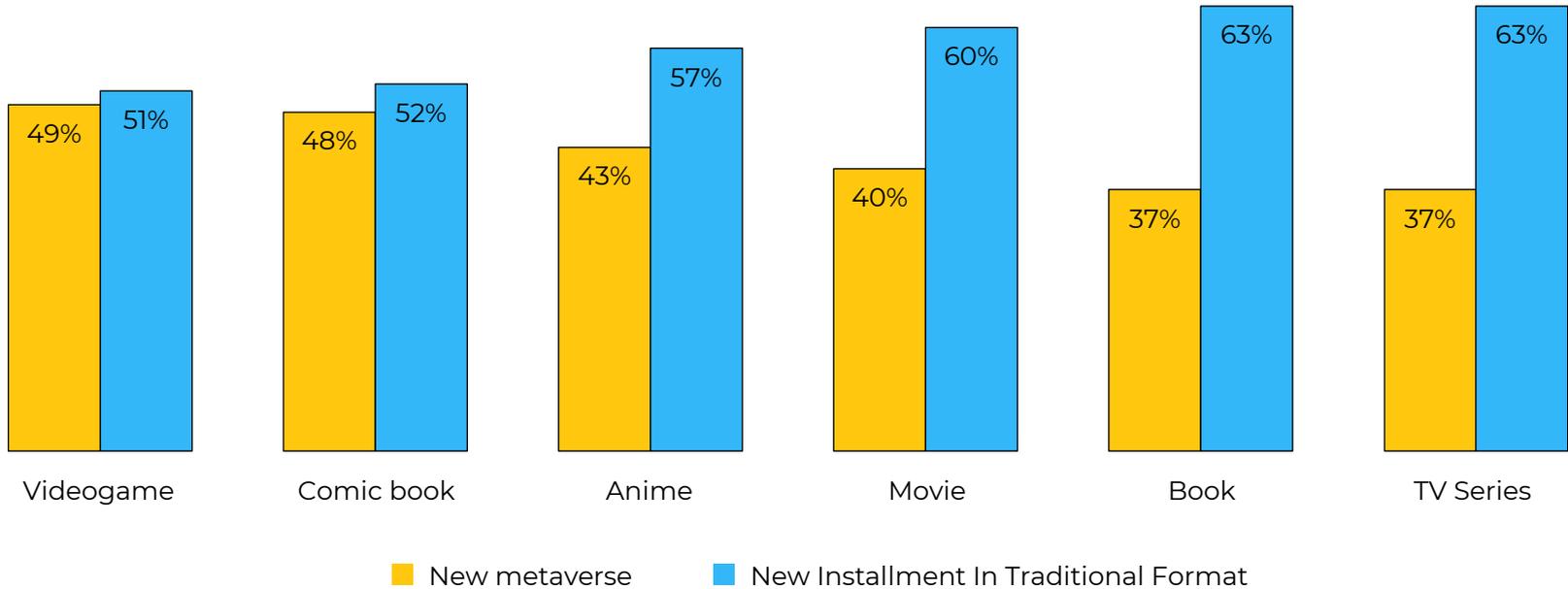


# Built-in characters and storylines from franchise IP provide scalable experiences around our need-states

Have already done this in a meta-verse like environment

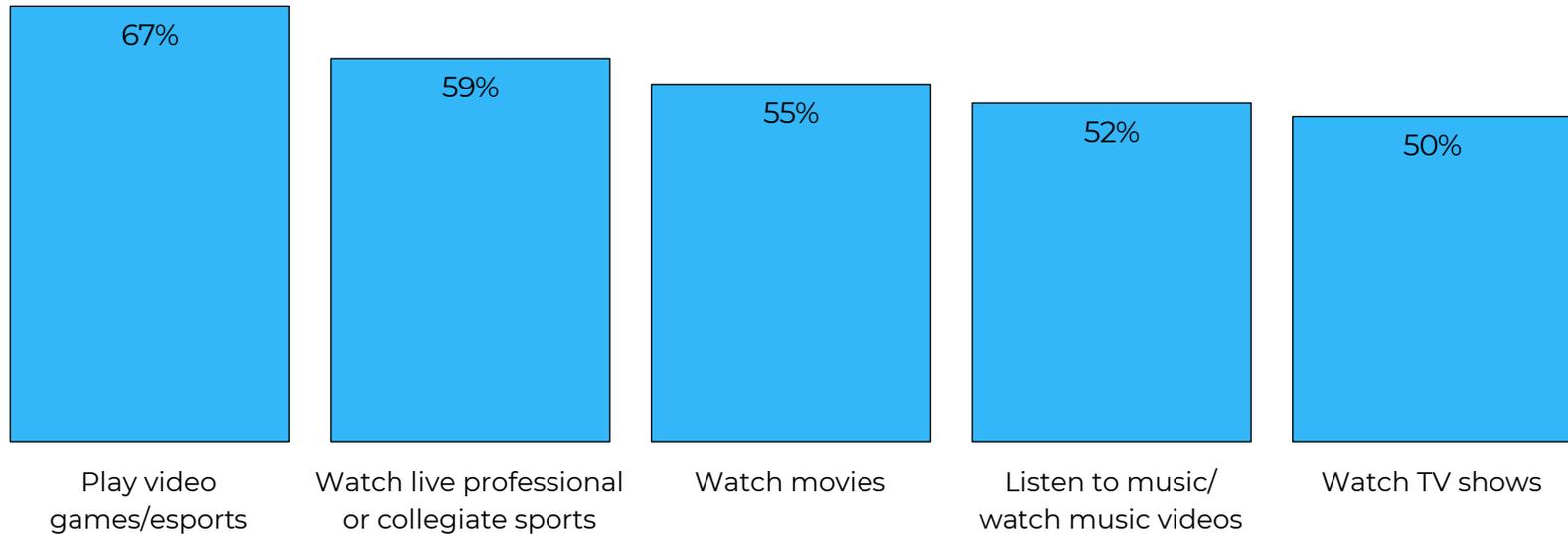


# A significant amount of fans may prefer to engage in this incremental opportunity for franchise IP



# The metaverse will enhance the experience of consuming entertainment...

Entertainment Consumption will be enhanced by the metaverse (a lot/a little better)...



## ...As well as the live event experience

51% of live event goers would rather experience live streamed event in the metaverse as opposed to watching a digital live stream on a mobile and PC device.



Live Experiences will be enhanced by the metaverse (a lot/a little better)...



# The barriers of live experiences dissipate in the metaverse

**64%** ACCESS (NET)

- I could get better seats than I would if I were at the live event in person **28%**
- I wouldn't have to wait in long lines to buy merch (e.g., tshirts, albums, etc) **21%**
- I could gain access to backstage or additional experiences related to the performance/event **20%**
- I could interact directly with the performer or other people involved in the event **20%**

**51%** A-LIST EXPERIENCE (NET)

- Tickets would cost less **33%**
- It would be more convenient/I could watch from anywhere **32%**
- It would allow me to watch a performance/game that was in another city, state or country **30%**
- I could attend with a friend or family members who live far away **27%**

**46%** AUGMENTATION (NET)

- I would be able to get a 360 view of the event **29%**
- The performance or event can take place in a more unique, unexpected location **20%**
- I would be able to see the event through the eyes of the performers/athletes **19%**

Experience will belong to **ALL**

PROBLEM

2/5

There **aren't** any content creators or people I like to follow there

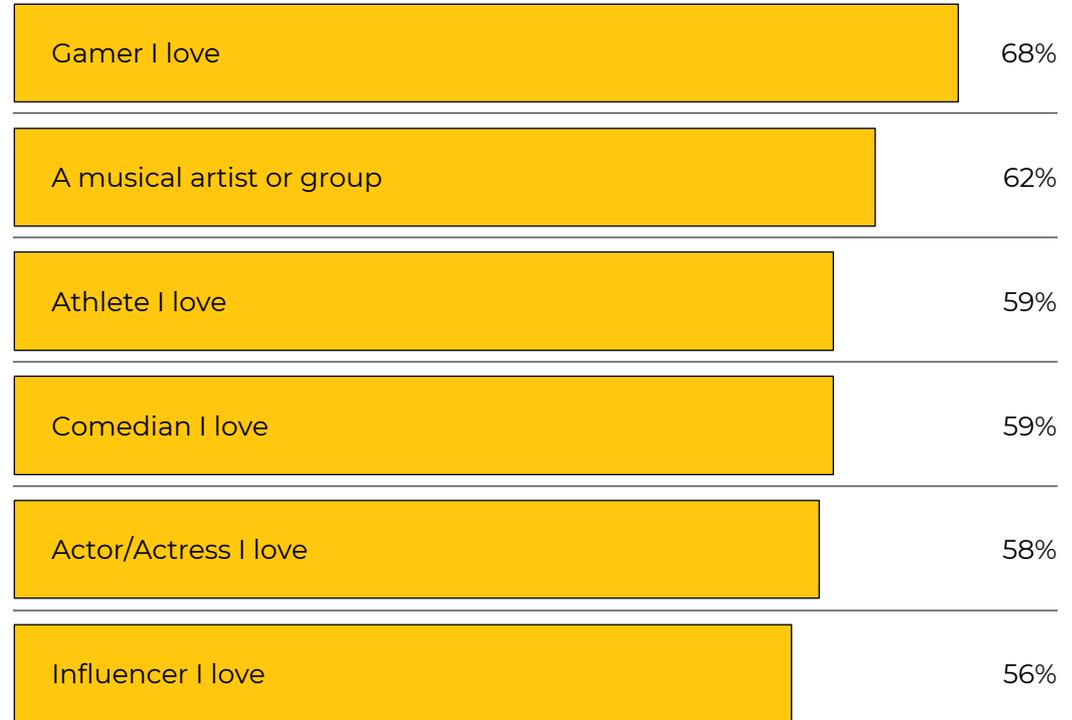
**SOLUTION**

**Bring Talent to the metaverse**

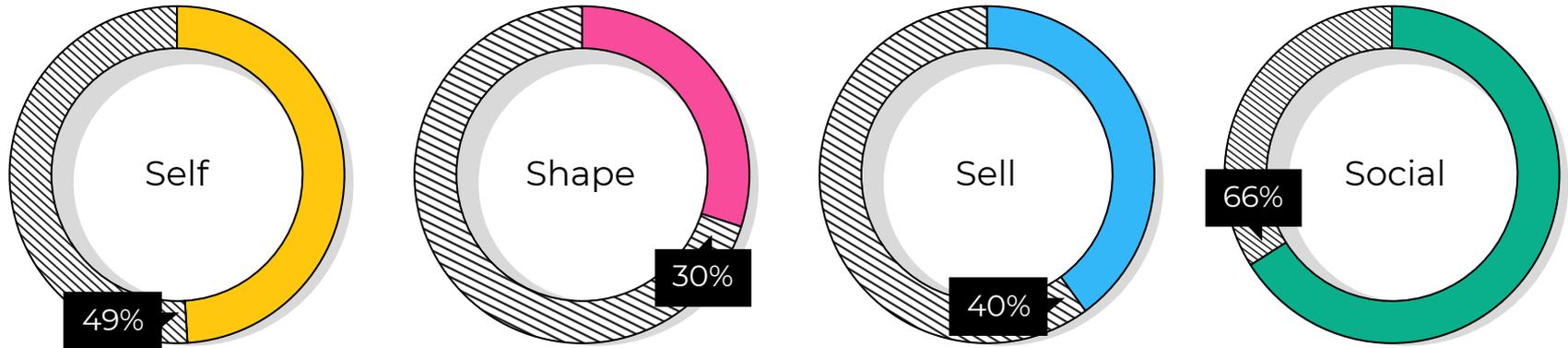
# Talent can tap in to the metaverse as a new dimension of fan engagement

**87%** of Americans 13-56 would be interested in visiting a metaverse that is built around a celebrity they love.

Interest in creator driven metaverses...



# Celebrity metaverses will also provide scalable experiences around our need-states



# Celebrity metaverses will also provide scalable experiences around our need-states

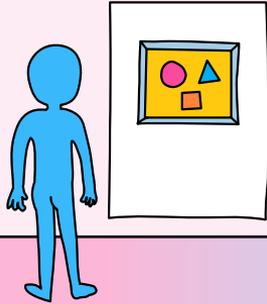


<sup>1</sup> (e.g., how to play a sport, how to play a type of instrument, etc.) / <sup>2</sup> (e.g., skins, outfits, tools, stickers, land, etc.)



# METAVERSE

# LEAN BACK

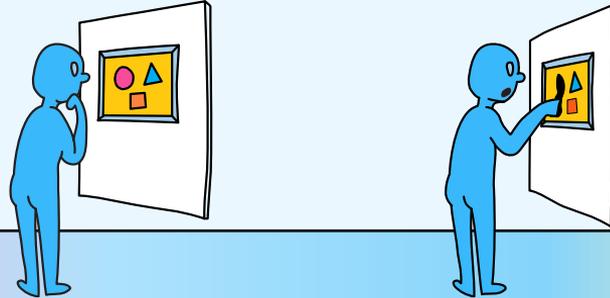


## TRADITIONAL MEDIA

Books  
Radio  
Television

- Access To Information
- One Way Delivery
- Curated/Scaled

# LEAN IN



## WEB 1.0

Information Websites  
Shopping Websites

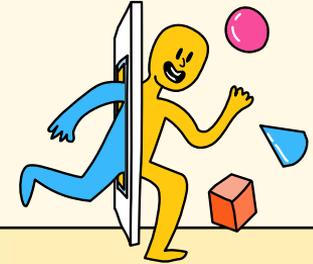
- Multi-device access
- Digital Commerce
- Fragmented & Personalized

## WEB 2.0

Social Platforms  
Commerce Platforms

- Media became interactive
- Digital identity
- Responsive to content
- Content sharing
- Content creation

# BE IN



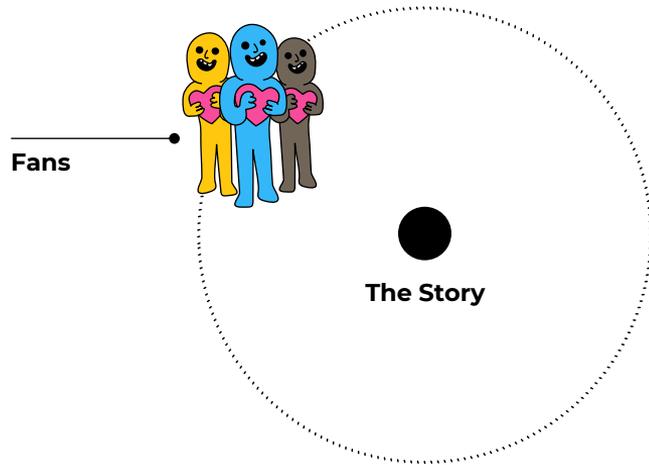
## WEB 3.0

Metaverse

- Immersion
- First Person
- Responsive to one another
- Altering digital environments

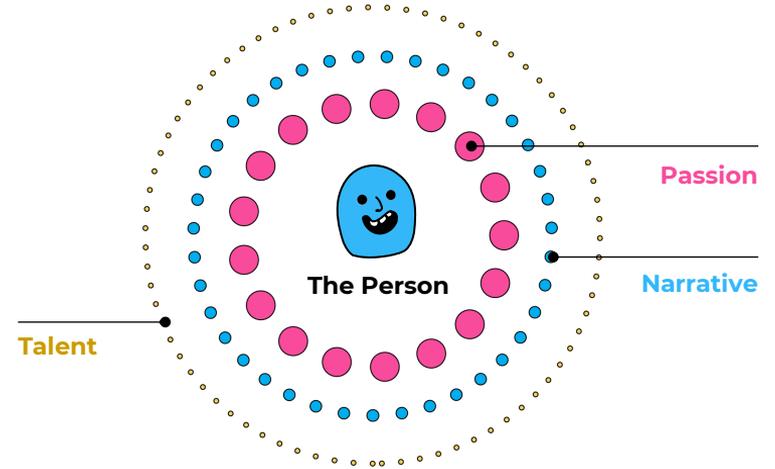
# Content in the metaverse revolves around ME

Inverting the traditional relationship between consumer and media content



## Traditional Media

Starts with the content, culture is built with **people**

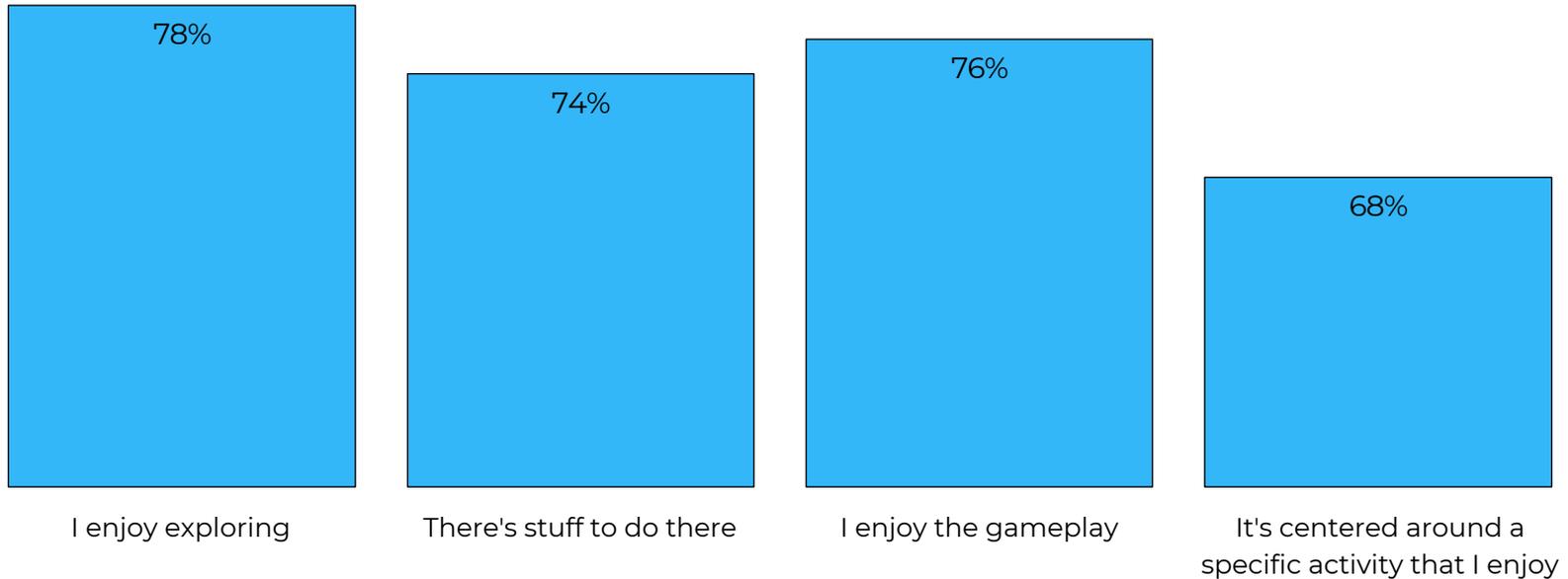


## Metaverse

Starts with the person, culture is built with the **experiences**

# Putting consumers in the driver's seat of active metaverse experiences is critical to its success

Of those that visit Metaverse type experiences, they go because...



# In the metaverse, consumers wield the creative control

When it comes to the metaverse, I'd agree that...

...I love creating things in, and for, this metaverse\*\*



...it will allow for more creativity than the digital world currently allows



...where anyone and everyone can be a creator



...it will be better than social media in letting people express themselves



# Decentralized creativity leads to more freedom for unfiltered self-expression

Of those that visit Metaverse type experiences, they go because...

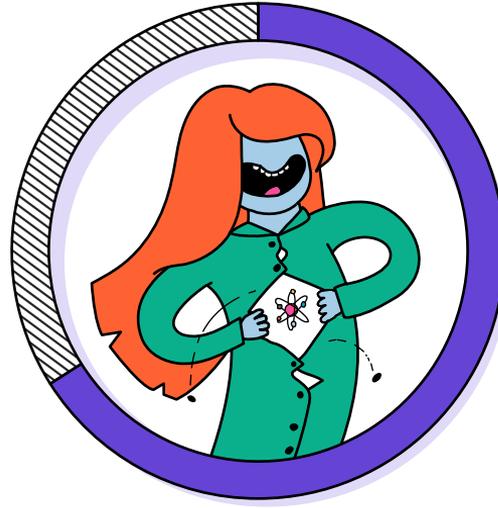
**68%**

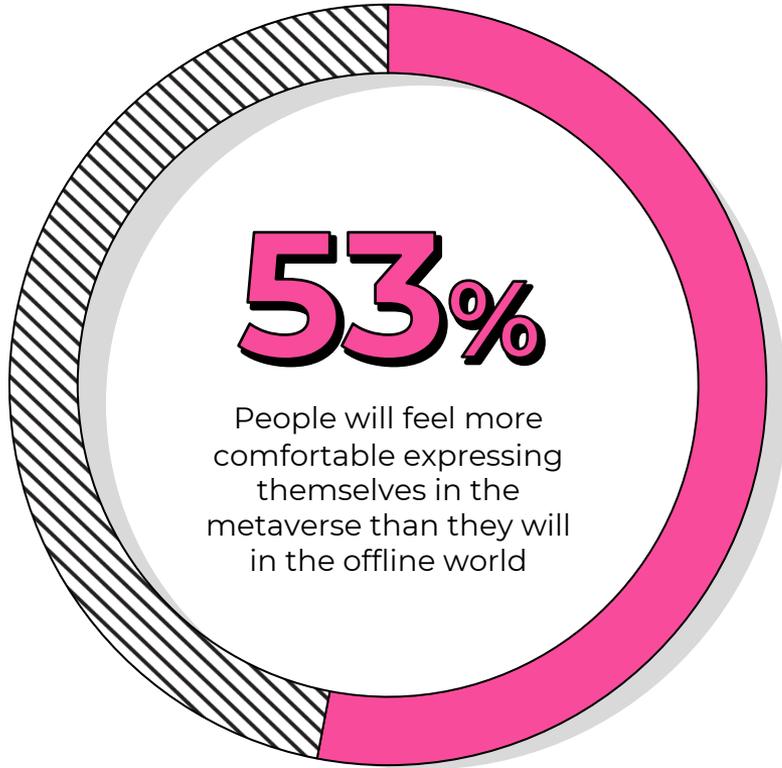
It's a place where I get to be myself



**66%**

I get to express myself unfiltered



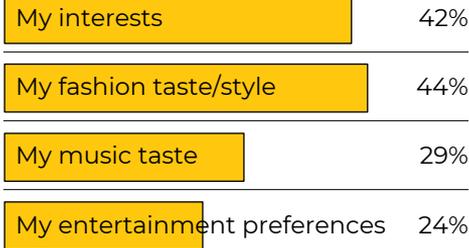
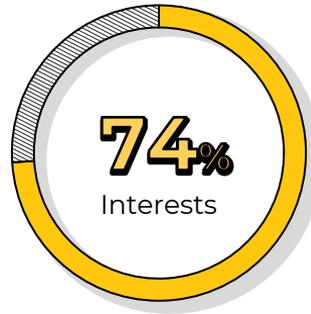
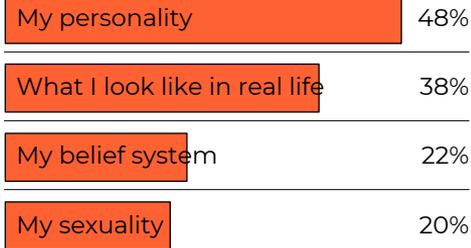
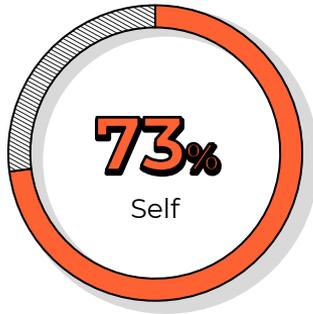


**Thus, the metaverse  
may offer a more  
transparent**

**YOU**

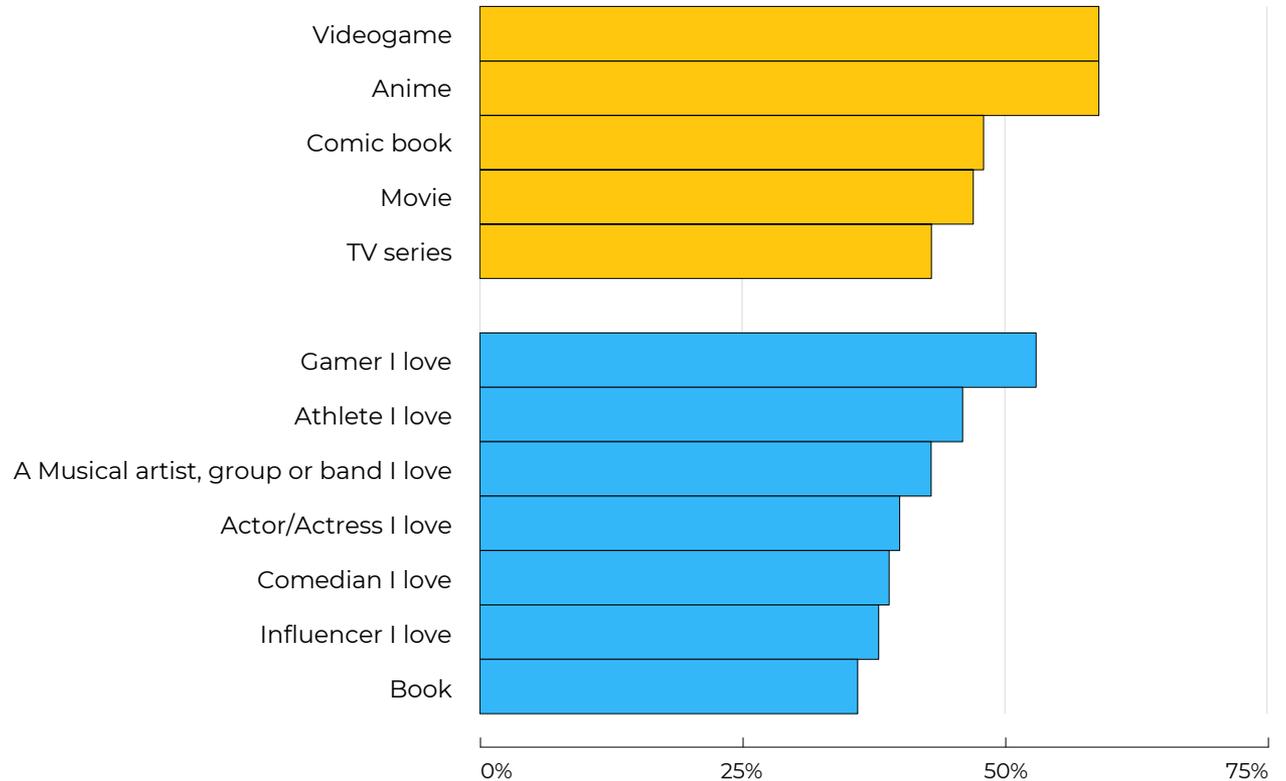
# With Avatars Represents The 'Inside You'

In what way does your Avatar represent you?



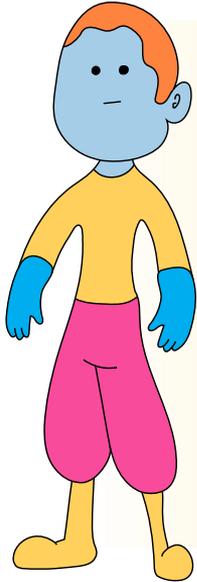
# Consumers have co-opted characters, celebrities, and symbols

Have any avatars you created use recognizable characters or symbols tied to franchises or celebrities you're a fan of? If so, which kind?



# Even when consumers co-opt a franchise, it's about customization and personalization... I am me in this next version of the Internet

When visiting a metaverse you're a fan of, which option do you agree with more when it comes to creating your avatar?



27%

An existing character in the universe of franchise



armour



hair



bling ring



73%

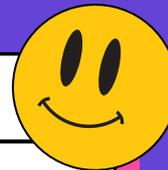
My character that has **customizable** traits in line with the characters I identify with the most

# 80%

of consumers are open  
to brands being involved with  
the building of the metaverse

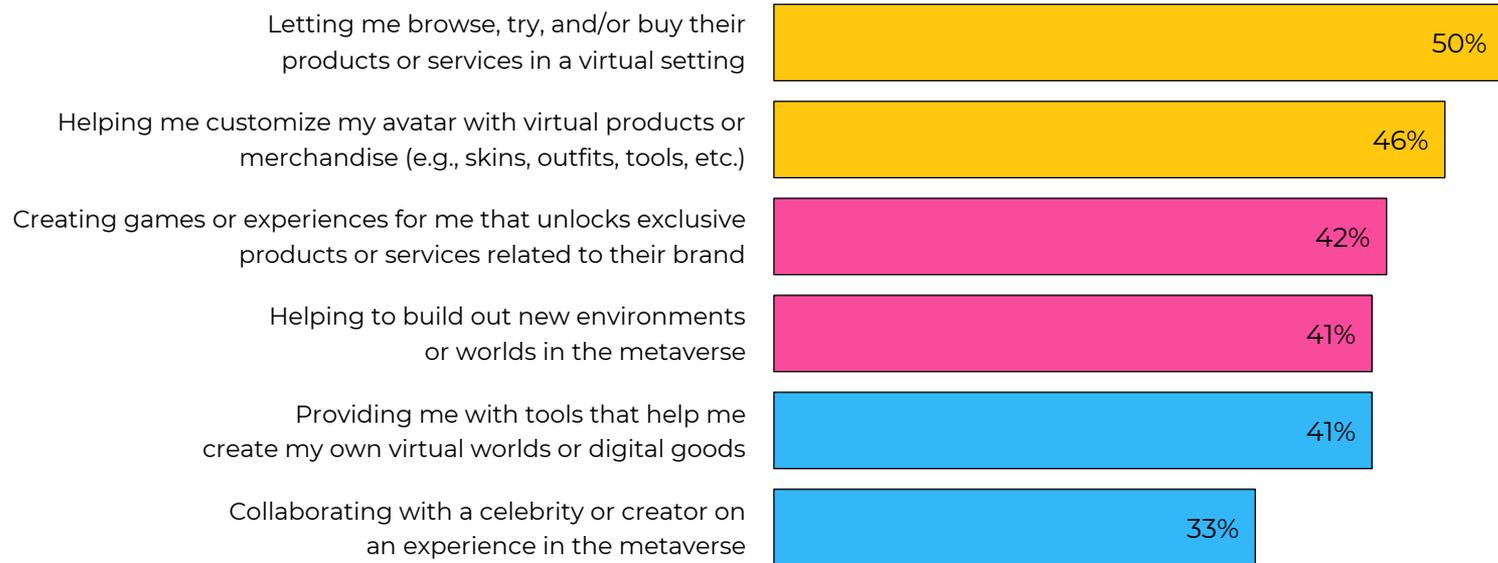
## RULE

Think about the **“ME-TA”** not  
the “verse” portion



# Metaverse brand products should help express consumers' identity and shape what they are creating

What type of metaverse experiences are you open with brands being involved with?



We want to **FEEL** before we **DO**.

We want to **BE** before we **BUY**.

# 53%

Stated that they will be able to do things in the metaverse that would be impossible for them to do in the physical world

## **RULE**

Enhance what is impossible to do in the physical world, not just replicating it

# Consumers are expecting a **BETTER EXPERIENCE** in the Metaverse...

so don't try  
if you don't  
bring it

I expect this to be significantly better in a virtual reality (or metaverse) environment?



# 29%

Of consumers already want brands to include a Metaverse component to real life events and sponsor creators

## **RULE**

Extend your physical brand

# METAVVERSE

Control

Talent

Narrative

NFT

VR

AR

Self-expression & Identity

Passion points

Community

BLOCKCHAIN

WEB3

HAPTIC