



A Marketers Guide to the Metaverse Consumer

The metaverse buzz is everywhere and people are taking notice. Brands are hiring some of the brightest minds to help them navigate this new space, financial institutions are preparing for its impact and journalists have covered extensively what this new space might entail. For most Americans, however, “metaverse” is still an ambiguous and complex term, one that means everything and nothing and is largely conveyed via marketing hype. Which raises the question as a Marketer: who will be your customer in the metaverse? What will bring them there, what will make them stay? How can your brand be part of the best the metaverse has to offer?

To help marketers think about these questions, the Harris Poll has conducted research to identify six distinct segments of Americans. These are not defined along simple demographic lines, but about what they really know about the metaverse, how they perceive it, why they may (or may not) find themselves there and what they are considering along the way. By understanding these segments, marketers can also begin to develop early strategies for interactions with consumers in this space.



Meet the Segments



The Harris Poll surveyed n=1007 US adults ages 18-54 to quantify the mindsets, motivations and hesitations that will influence both who is first to the metaverse and which products will appeal to various individuals. We segmented the data collected and found six distinct consumer groups.

At this early juncture, three factors are critical in shaping how individuals will approach the metaverse:

1. Awareness and familiarity (with the metaverse as a whole, not just individual components)
2. Attitudes towards big tech
3. Motivations for engaging with the metaverse

Given the mystery and ambiguity of the metaverse today, understanding the specific levels of awareness and familiarity among different audiences will have big implications for how marketers engage in this space. An NFT drop might not make sense for your given audience, but an augmented reality experience may.

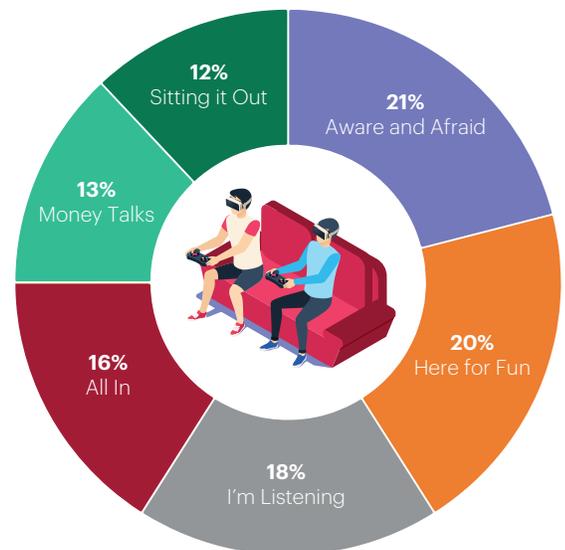
Attitudes towards big tech also define how consumers will approach the metaverse – if you think big tech is exciting and cutting edge, your expectations for (and fears about) the metaverse are very different than if you have primarily mixed or negative feelings toward big tech today.

Lastly, consumers have varied motivations for engaging in the metaverse. Between money, personal expression, community, and curiosity, there is a lot that might draw someone in. What resonates for people has implications for what they expect from others, including marketers, that they will encounter in the metaverse.

Using the key dynamics of familiarity, big tech perceptions and motivations we can classify people into one of six similarly sized segments (shown in the chart at right).

Interestingly we found that the segments were demographically mixed across age, race, and gender. (Sitting it Out skews slightly older; All In skews slightly more male; I'm Listening skews slightly more female.)

While interest in new tech often skews younger, we find that age is not a defining factor in overall awareness or interest (among those 18-54) and while positive associations with the concept are even across age groups, the youngest adults (18-24) have the strongest negative associations. As such, this data highlights the need for a more holistic paradigm to truly understand key consumer nuances.



Do you know anything about the metaverse?

Yes

No

What's the first thing you associate with the metaverse?

Big Tech

Something Else

In a good way?

What would draw you into the metaverse?

Not exactly...

Yes!



You are **Here for Fun!**

Yes, there's a lot to the metaverse, but you're focused on the cutting-edge technology aspect. You want to be entertained. It's time to have some fun. **Go to page 4!**

Entertainment, Expression, Connection: Imagine the Possibilities!

A Chance to Make Money

You are **I'm Listening!**

You don't know much yet, but you're thinking you'd like to know more. It seems like there might be real potential for making money, but also personal expression, or making a better world. You're kind of afraid, but kind of excited too. **Go to page 9.**

You are **All In!**

You know quite a bit and you like what you see. Yes, there are dangers to guard against, but you believe in the deep promise of the metaverse for community, expression, and decentralization. Now it just has to happen. **Go to page 7.**

Are you scared?

Yes

Nah, let's wait and see

You are **Aware and Afraid!**

The metaverse sounds entertaining, but we stand to lose a lot getting there, and there's a high chance of it ending up as an impersonal dystopia run by big tech. You're still curious, of course. **Go to page 5.**

You are **Sitting it Out!**

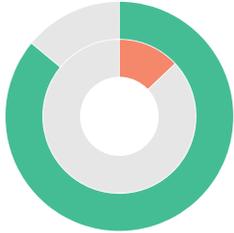
People are always talking about new technologies, but this doesn't feel very relevant to you. Let the metaverse do what it will, you won't be there. **Learn more on page 6.**

You are **Money Talks!**

You've heard about the metaverse but you're more familiar with some of its parts—especially crypto and blockchain. If you can make money in it, that's what will draw you in. **Page 8 for you!**



Here for Fun



87%
Aware of the Metaverse

14%
Somewhat/Very Familiar
with the Metaverse

Top associations

Big Tech, Cutting Edge, Community

What brings them in?

Curiosity, Entertainment

Likely entry point

AR/VR for gaming and entertainment

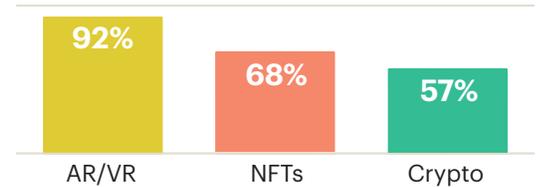
What do they know & how do they feel?

Those Here For Fun are largely aware of the concept of the metaverse (87%) but not very familiar with exactly what it is in reality. They strongly associate it with big tech, which for them is a good thing. Here, big tech is enabling a community that is fun, cutting-edge, and diverse. They are also generally familiar with virtual reality (VR) and cryptocurrency.

Why would they explore the metaverse?

Curiosity and entertainment seeking drives them to explore the metaverse. They are most interested in AR/VR capabilities – specifically using these technologies for gaming or to access entertainment (e.g., virtual concerts). A portion are also interested in NFTs (68%) and cryptocurrency (57%).

Would be interested in . . .



Are they worried about anything?

The top concern among these individuals is the impact that the metaverse will have on our physical world – if we can escape into the metaverse, will we care less about the world we actually live in? They are also worried about the loss of personal connection and social skills.

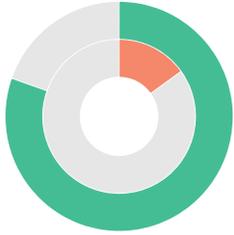
What do they want from you, the marketer?

Roughly half would be excited to see brands engaging in the metaverse, particularly small, local brand or fashion brands in addition to their favorite brands. As with many others, they are looking for brands to provide connection between the real world and the virtual world (e.g., collecting NFTs that can be converted into 'real life' items, or buying a product that is both virtual and 'real' such as shoes you own in 'real' life and your avatar can wear in the metaverse). Ideally these experiences will also be personalized. The majority (90%) are also at least somewhat interested in AR/VR experiences from marketers.

When this group wants to learn about all things metaverse they are likely to turn to blogs, friends & family, Reddit or podcasts.



Aware and Afraid



79%
Aware of the Metaverse

14%
Somewhat/Very Familiar
with the Metaverse

Top associations

Big Tech, Confusing, Dystopia

What brings them in?

Curiosity, Entertainment

Likely entry point

AR/VR for gaming, Digital Therapeutics



What do they know & how do they feel?

This segment is generally aware of the metaverse (79% aware) but is limited in details and familiarity. Regardless, they don't like what they do know. This group largely sees the metaverse as a big-tech driven, confusing dystopia. They are also more likely than others to associate it with being destructive, elitist, capitalist and a scam. They are also much less optimistic about the metaverse/web3 delivering on its promise as compared to web2/social media.

Why would they explore the metaverse?

The majority of these individuals would only explore the metaverse out of curiosity. A smaller percentage (42%) may also be interested in AR/VR-based entertainment options in this space, likely related to gaming. This group also over-indexes others on interest in digital therapeutics. As such, they might be attracted to something that feels innovative but also native to the real world and in service of the real world.

Are they worried about anything?

This group is worried about everything; they over-index on all concerns we asked about. Two-thirds were concerned about nearly everything presented to them – they are only unconcerned about being left behind. Their top concern is that collectively we will lose the skills needed to interact with one another. They are also highly worried about the loss of personal relationships and the impact the metaverse may have on our physical world.

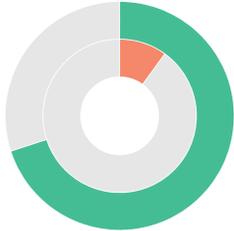
What do they want from you, the marketer?

First, do no harm. Most of these individuals will not be impressed by a brand's effort in the metaverse – but efforts that don't actively involve them are unlikely to hurt. Any sort of aggressive attempts at metaverse inclusion for this group are likely to backfire. They do hope that the metaverse can be a place for small/local and BIPOC brands, but given their skepticism, believe it'll largely be dominated by big business.

If and when they want to learn more about the metaverse they will look to Reddit (the native home of the skeptic), traditional news, friends & family and podcasts.



Sitting it Out



63%
Aware of the Metaverse

10%
Somewhat/Very Familiar
with the Metaverse

Top associations

Big Tech, Confusing, Cutting Edge

What brings them in?

Curiosity

Likely entry point

AR/VR for gaming and entertainment

What do they know & how do they feel?

Those Sitting it Out are aware of concepts like cryptocurrency and virtual reality (VR) – but have more limited awareness of, and familiarity with, the metaverse. This group strongly associates the metaverse with big tech, but their feelings toward big tech are mixed: they have negative associations (like the Aware & Afraid segment) but they can also know that big tech is cutting edge. They find the metaverse confusing at present and are equally likely to see it as a dystopia as they are to see it as a place filled with opportunities. They are not totally dissimilar to the ‘Here for Fun’ cohort, but a bit older, a bit more female and a bit more skeptical. Until they see how this plays out, they plan to sit it out.

Why would they explore the metaverse?

They aren’t really interested in exploring the metaverse at present, but if they were to do it it would be for simple curiosity. They may also be slightly motivated by desire to be entertained, to make money or to keep up with technology. Roughly half of this group (52%) express some interest in AR/VR technology as it relates to gaming and entertainment using AR/VR.

Are they worried about anything?

Unlike most other cohorts, this one does not have strong concerns about the metaverse because they don’t think it’s relevant for them – 62% say “I have no fears, I won’t be there.”

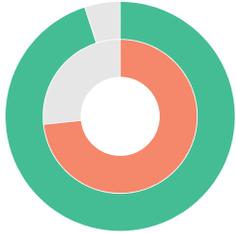
62%
say “I have no fears,
I won’t be there.”

What do they want from you, the marketer?

Nothing. These individuals have no plans to engage in the metaverse and are not concerned with what marketers are doing in the space. If they had to guess what is happening within the metaverse, most expect it to be a place that will be dominated by big business - despite rooting for BIPOC brands to find a space in this new world.



All In:



95%
Aware of the Metaverse

66%
Somewhat/Very Familiar
with the Metaverse

Top associations

Exciting, Fun, Inviting

What brings them in?

Personal expression, connection, entertainment

Likely entry point

Crypto, AR/VR for gaming and shopping

What do they know & how do they feel?

These individuals are nearly universally aware of the metaverse and most of the key components – cryptocurrency, virtual reality & NFTs. Despite being the most aware cohort, only two-thirds feel that they are actually kind of familiar with the metaverse. As the metaverse continues to take shape, this group will be first in line to learn more.

This group is also largely excited by what they do know – they see the metaverse as exciting, fun and inviting, and can see applications that others may not, such as how it could be a space for art & expression. Overwhelmingly they see the metaverse in a positive light.

Why would they explore the metaverse?

This cohort is primarily interested in the metaverse as an opportunity for personal expression, connection, and entertainment. As such, they are highly interested in AR/VR experiences – specifically gaming in AR/VR or shopping for ‘real life’ in AR/VR.

They are also highly interested in cryptocurrency and NFTs. Of course, they are aware of money-making prospects tied to these items, but money is not their top motivator.

Are they worried about anything?

This segment is most concerned about what might be ‘lost’ as individuals spend more time in the metaverse. Top concerns are losing the skills to interact with others in non-virtual life, losing personal relationships and lowered concern about the physical world.

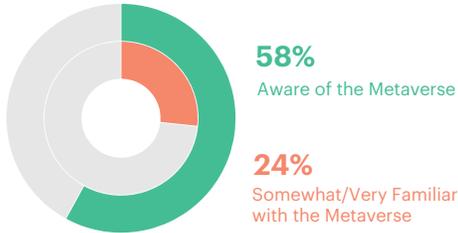
What do they want from you, the marketer?

These individuals are excited to see what brands come up with in the metaverse; most (74%) say that seeing brands in the metaverse would improve their perceptions of the brand. They are looking for links between the metaverse and the non-virtual world and increasingly personalized experiences. They are most excited about seeing their favorite brands, sports brands, and fashion brands in the metaverse. This group believes both big and small, local brands have an opportunity in the metaverse.

To keep learning about this space, this group will turn primarily to social media (Facebook, Instagram, Twitter) and their friends & family.



Money Talks



Top associations

Fun, Exciting, Community

What brings them in?

Make Money, Connection

Likely entry point

Crypto, Music NFTs, AR/VR for entertainment, gaming, and shopping

What do they know & how do they feel?

Like the All In cohort, this group doesn't see the metaverse as primarily 'big tech'; instead they are cautiously optimistic it will be a fun, exciting, community with a potential to be truly equitable. And, importantly, a place to make money. They are the group most likely to expect that web3 will be better at delivering on its intended purpose than web2/social media was able to do. They have more familiarity with VR, blockchain, and NFTs than the metaverse as a bigger concept, but they're excited about what the metaverse could be.

Why would they explore the metaverse?

This group is financially motivated; they are the group that most strongly views the metaverse as a place to make money. They can also see secondary benefits of connection and personal expression. As such, they are most interested in products like cryptocurrency, NFTs (specifically music-based). They are also interested in AR/VR capabilities spanning gaming, shopping, and entertainment-focused applications.

54%
say 'to make money'
is a top reason they'd
access the metaverse

Are they worried about anything?

This group has diverse, but relatively mild concerns. They are worried about the metaverse being run by the same rich, white guys as other big tech, that as a society we'll care less about the physical world and that we may lose skills for interacting.

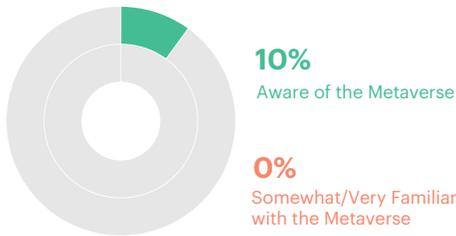
What do they want from you, the marketer?

Roughly half would be excited to see brands engaging in the metaverse, particularly small, local brand or fashion brands in addition to their favorite brands. As with many others, they are looking for brands to provide connection between the real world and the virtual world (e.g., collecting NFTs that can be converted into 'real life' items, or buying a product that is both virtual and 'real' such as shoes you own in 'real' life and your avatar can wear in the metaverse). Ideally these experiences will also be personalized. The majority (90%) are also at least somewhat interested in AR/VR experiences from marketers.

When looking to learn more, these individuals will turn to social media (Facebook, TikTok, Twitter, Instagram) and their friends or family.



I'm Listening



Top associations
Profit, Cutting-Edge, Opportunity, Rich

What brings them in?
Curiosity

Likely entry point
AR/VR for gaming, shopping and business

What do they know & how do they feel?

This segment is largely unaware of the idea of the metaverse – in fact, only 10% have ever heard of the term. (They are equally unaware of web3.) However, a portion do have awareness of cryptocurrency (53%) and virtual reality (46%). Based on what they do know, or what they'd guess about the metaverse, it is seen as cutting-edge, opportunity rich and profit-centric. That said, this group is also more likely than others to associate the term metaverse with 'white' and 'patriarchy'. In short, they don't know much, but they're listening.

Why would they explore the metaverse?

Curiosity is the key motivator for this group to explore the metaverse. Other motivations exist but are secondary given their lack of knowledge.

This audience is most interested in AR/VR technologies (74% are interested) – these technologies are the most familiar and this group is interested in how they might be used in everything from gaming to shopping to conducting business. Roughly half are also interested in NFTs. This group is interested in the possibilities.

Would be interested in . . .



Are they worried about anything?

Mostly no. While some are worried about the impact the metaverse will have on our care of the physical world, for the most part they don't know enough yet to have well-defined fears.

What do they want from you, the marketer?

Not much yet, but they are open to your invitations. While this group's expectations are largely unformed, they do hope that brands can bring more personalization to the metaverse and also provide links to real life experiences. While most would not yet be 'wowed' by a brands engagement in the metaverse, a majority (59%) are at least somewhat interested in AR/VR experiences.



Key Considerations As Marketers Enter the Metaverse

The insights from these segments highlight some broad truths for marketers:

- 1. Consumers are open to brands trying new things in this environment:** From the consumer perspective, the risk to brands as they experiment in the metaverse is low. Most consumers either have a favorable opinion, or a neutral opinion of brands experimenting in this space. Very few consumers see brands activity in this space in a negative light. Only 15% of individuals say that brands creating new, innovative experiences for the metaverse would negatively impact their perceptions of the brand – so there's little downside to giving things a try.
 - Experiment and learn – consumers are excited to see what you come up with.
- 2. People are looking for ways to link their current world with this new world:** Across segments, individuals are highly interested in brands creating experiences that link the virtual world to the real world – from apparel that both you and your avatar can wear, to loyalty programs that offer real-world benefits for virtual activities, or vice versa, to an NFT that has both virtual and real world value. Avoid the hard sell and think about the experience that you can offer your brand fans – the possibilities are great.
 - Look to develop experiences that serve as a bridge between real known benefits and an as yet unexplored frontier.
- 3. AR/VR is an accessible place to start:** Interest and familiarity with AR/VR is strong across segments, and is one of the more tangible and understood elements of the metaverse at this moment. 19% of all American adults already own a VR headset (and 35% of the most excited All In segment own one).
 - Consider how you might interact with your customers via AR/VR experiences as a broad and accessible entry point to the metaverse.
- 4. Consumers need help overcoming the fear of what they might lose in the metaverse:** As is common with new technology or cultural shifts, the biggest concerns going into the metaverse are about losing things we value today – personal connection, the ability to interact with one another and a focus on our physical world.
 - Focus on what is gained. Developing experiences designed to add community or connection that wasn't possible before, or that pay explicit attention to sustainability will help bring more consumers into web3 experiences.
- 5. Education will be needed to bring consumers along:** While many marketers are already investing heavily in the metaverse, consumers still have a way to go to fully understand what it all means and how they can benefit. As such, marketers may need to help educate individuals along the way. How can a customer access an NFT drop for the first time?
 - Be willing to go slow and meet consumers where they are. It may take effort, but you have the chance to guide how they access & experience the metaverse.



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Methodology:

This survey was conducted online within the United States by The Harris Poll from Jan 27, 2022 to February 2, 2022 among a representative sample of 1,007 US adults ages 18-54. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables, please contact The Harris Poll.

