

CONSUMERS AND THE METaverse – GERMANY – 2023

The metaverse remains nebulous, rarely used and of questionable utility. While brands can capitalise on the underlying technologies and gaming metaverses, doubling down on tangible consumer benefits is crucial to gain resonance.



Jan Urbanek, Principal Analyst



Consumers And The Metaverse - Germany - 2023

This report looks at the following areas:

- Awareness of the metaverse
- German consumers having accessed a metaverse before, including frequency and devices used
- Gaming/metaverse platforms accessed by German consumers
- Metaverse-related activities Germans have done in the last 12 months or would be interested in doing, including visiting stores in virtual worlds and using a VR headset
- Associations with the metaverse
- Attitudes towards virtual worlds and the metaverse, including the importance of one's online identity and sentiment towards NFTs



The metaverse remains nebulous, rarely used and of questionable utility. While brands can capitalise on the underlying technologies and gaming metaverses, doubling down on tangible consumer benefits is crucial to gain resonance.

Overview

Usage of the metaverse remains scarce with only **13% of Germans who have heard of the metaverse** having accessed one. **Video games are how a majority of Germans engage in virtual worlds**, driven by younger Germans.

Brands seeking immediate marketing impact in the metaverse will have to focus on video games, with its particular ability to build brand affinity among younger males. **51% of German males aged 16-24** consider brands to be **more likeable if they collaborate with video game companies** (vs 23% for females aged 16-24).

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Younger Germans show an appetite for virtual experiences and metaverse-related tech such as visiting stores in virtual worlds. While this points to retail opportunities, younger Germans have a critical eye regarding brands' intentions with metaverse tech. **Brands need to double down on consumer benefits in the metaverse** to resonate; for example, by making sure to add to the player's gaming experience with engagements in video games.

Only **11% of Germans who have heard of the metaverse** associate it with being useful. **Brands must demonstrate how the metaverse can meaningfully contribute to consumers' lives.** Offering access to exclusive content that would benefit from but doesn't require XR devices, such as virtual concerts, can be a way to resonate as ownership of XR devices remains low and prices high.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for the metaverse

Market context

- Gaming is a central pillar of metaverse adoption and development
- AI will accelerate the development of the metaverse
- Technology is also a bottleneck for the metaverse

Opportunities

- Engage younger Germans via video games
 - Graph 1: gaming/metaverse platforms accessed, by age, 2023
- Grow the metaverse by proving its utility
- Cater to younger Germans' appetite for virtual experiences
 - Graph 2: metaverse tech activities done in the last 12 months or interested in doing (NET), by age, 2023
- Use metaverse tech to engage younger Germans
- Always ensure tangible consumer benefits in the metaverse
- Empower younger Germans' self-expression in the metaverse
- Quick download resources

MARKET DRIVERS

Defining the metaverse

- What is the metaverse?
- Features described as key for a universal metaverse
- Interoperability
- Persistency
- Immersiveness
- Decentralisation
- Does the metaverse exist yet?

Gaming

- Younger Germans are most accustomed to virtual experiences
 - Graph 3: frequency of video game activity on any device (NET), by gender and age, 2022
- Gaming is a technical pillar of the metaverse

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- Unlock the potential of the metaverse through accessible creator tools

Artificial intelligence

- Artificial intelligence is on the rise
 - Graph 4: number of AI publications and patent filings, in thousands, 2010-21
 - Graph 5: Google searches for the topic 'Künstliche Intelligenz' (Artificial Intelligence) and the term 'ChatGPT', 2022-23
- AI to accelerate development of the metaverse
- AI will make creating virtual experiences more accessible

XR devices

- Defining the XR spectrum
- Germans are hesitant about VR headsets
 - Graph 6: household ownership of VR headsets*, by selected countries, 2023
- Advances with XR devices will bring the metaverse to life
- How AR glasses can impact consumers' daily life in the future
- Styly transforms the city into AR space

Connectivity

- Connectivity bottlenecks the metaverse...
- ...painting a long road ahead for the metaverse

The German economy

- The cost-of-living crisis is holding back the post-COVID-19 recovery
 - Graph 7: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Budget squeezes can impact demand for aspirational tech
 - Graph 8: household ownership of selected devices, by net monthly household income, 2022
- The impact of the economy on the metaverse
- Revive the lockdown momentum of virtual socialising

WHAT CONSUMERS WANT AND WHY

Awareness of the concept of the metaverse

- The metaverse hype flattened in Germany
 - Graph 9: Google searches for the metaverse ('Metaversum'), 2021-23
- Knowledge about the metaverse remains scarce in Germany
- Focus on meaningful experiences when targeting young early adopters
 - Graph 10: awareness of the concept of the metaverse, by age, 2023
- Go hard on promoting the utility of the metaverse in Germany

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- Graph 11: awareness of the metaverse*, 2022

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- Match consumer expectations to grow the metaverse
- Accelerate adoption by leveraging the pioneers
 - Graph 12: frequency of accessing a metaverse, 2023
- Focus on multi-platform accessibility in the short-to-mid run
 - Graph 13: devices used to access a metaverse, 2023
- Ease access to metaverse experiences

Gaming and metaverse platforms accessed

- Tap into the popularity of video games when shaping metaverse strategy
 - Graph 14: gaming/metaverse platforms accessed, 2023
- Video games overshadow other metaverse platforms among digital natives
 - Graph 15: gaming/metaverse platforms accessed, by age, 2023
- Position to co-exist with online gaming...
- ...and differentiate with unique content
- Differentiate between gaming and metaverse initiatives
- Younger men lead with engagement in virtual worlds
 - Graph 16: video games and metaverse platforms accessed, by gender and age, 2023
- Resonate with young men via gaming
- Ways for brands to incorporate gaming into their marketing
- Ballantine's x Borderlands: sympathising with the gaming community

Activities regarding metaverse technologies

- Metaverse technologies have growth potential in Germany
 - Graph 17: activities regarding metaverse technology in the last 12 months, 2023
- Capitalise on metaverse technologies
- Younger Germans lead the adoption of metaverse technologies
 - Graph 18: virtual activities done in the last 12 months, by age, 2023
- Use emerging tech to spark excitement among younger Germans
- Metaverse tech met with interest across age groups
 - Graph 19: virtual activities not done in the last 12 months but interested in doing, by age, 2023
- Don't dismiss the potential of metaverse tech when targeting mid-to-older aged Germans
- NFT hype largely declined in Germany
 - Graph 20: Google searches for the topic 'Non-Fungible Token', 2021-23
- Put consumer value first when offering NFTs
- Focus on video games with virtual fashion
- Encourage VR adoption with firsthand experiences

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- Cater to consumers' appetites for virtual experiences
- Harness the power of AR to resonate with digital natives
- Snapchat's use of AR enhances their festival experience
- Engage younger Germans with virtual brand experiences
- Alo Yoga reflects the interests of its target group
- Allow consumers to virtually explore products
- Virtually exploring 3D recreations of travel destinations

Associations with the metaverse

- Germans have mixed feelings about the metaverse
- Prove the worth of the metaverse
- Address safety and wellbeing concerns with the metaverse...
- ...and show how it can enhance wellbeing
- Digital natives are excited by the metaverse
 - Graph 21: associations with the metaverse, by age, 2023
- Offer utility for digital natives in the metaverse
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 - Graph 22: associations with the metaverse, by having accessed a metaverse before, 2023

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- German consumers are cautious with the metaverse
 - Graph 23: attitudes towards the metaverse, 2023
- Build a clear and positive image of the metaverse
- Leverage the metaverse for good
- Empower younger Germans to express themselves in the metaverse
- H&M invites younger consumers to express themselves in Roblox
- Help younger consumers find a career
- Consider the physical demands of VR experiences
- Tap into the appeal of virtual worlds and identities
 - Graph 24: attitudes towards virtual activities, 2023
- Capitalise on the power of popular franchises
 - Graph 25: finding visiting a virtual simulation of a fictional world appealing, by age, 2023
- Seize gaming as a fashion opportunity
- Ralph Lauren targets younger consumers with virtual fashion

LAUNCH ACTIVITY AND INNOVATION

- Xiaomi reveals AR glasses
- Epic Games pushes its metaverse efforts

- Epic Games eases access to custom-built experiences in Fortnite
- Tapping into smart TVs as access points to the metaverse
- Meta advertises the professional utility of the metaverse
- AR lenses can overcome barriers to experience the metaverse

APPENDIX

Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

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