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A NEW AGE OF THE INTERNET: WEB 3.0, THE METAVERSE, AND NFTS

2022 Global Consumer Opinion Report Across 19 Markets

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STUDY BACKGROUND

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STUDY BACKGROUND

The growing interest in cryptocurrency over the past decade has turned people's attention to the blockchain – the technology through which cryptocurrencies are sold and stored online. In short, the main advantages of leveraging the blockchain for cryptocurrencies are privacy and data security. And many see the opportunity to extend these benefits to the greater internet by reshaping the digital space with blockchain technology.

Today, crypto blockchains are helping to advance the new age of the internet, which was termed 'Web 3.0' by Ethereum's co-founder back in 2014. Web 3.0 is birthing new ways of consumer engagement, and these will only continue to evolve in the coming years. Consumers are gradually embracing these new ideas as organizations strive to learn more about the potential of Web 3.0.

With Web 3.0 encompassing many different concepts—including the Metaverse, NFTs, and Cryptocurrency—Toluna conducted a wide-scale tracking study spanning across 19 global markets to understand how consumers perceive and interact with these innovations. The findings have provided us with a glimpse into the future of consumer engagement and how brands can stay relevant in this new digital landscape.

WE COVERED RESPONDENTS ACROSS THE GLOBE IN OUR ONLINE SURVEY

To ensure representativeness across each market, we set quota as per national representation of aged 18 - 64 years, SES ABCD, Urban population

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4
REGIONS

19
MARKETS

10,500
RESPONDENTS

NA

United States

LATAM

Brazil

EMEA

Germany

Spain

France

Italy

United Kingdom

United Arab Emirates

Saudi Arabia

APAC

Singapore

Indonesia

Philippines

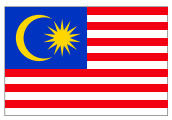
India

Thailand

Hong Kong

Australia

Vietnam


Malaysia

China

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MARKET DEFINITION

EMERGING VS DEVELOPED MARKETS

EMERGING

LATAM

(n=500)

Brazil

APAC

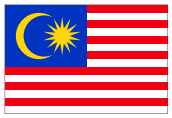
(n=3500)

India

Philippines

Indonesia

Thailand



Malaysia

Vietnam

DEVELOPED

APAC

(n=2500)

Singapore

Hong Kong

China

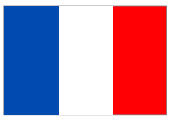
Australia

EMEA

(n=3500)

Germany

Spain



France

Italy

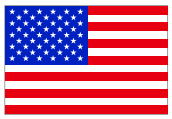
United Kingdom

United Arab Emirates

Saudi Arabia

NA

(n=500)



United States

KEY TAKEAWAYS

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#1

DATA SECURITY AND OWNERSHIP ARE BIGGEST APPEAL

People are prioritizing data security (49%) and data ownership (47%) over monetary gains (34%) or convenience (33%).

Older generations, such as Baby Boomers and Gen X, are more concerned about data ownership than younger generations. On the other hand, Gen Zs and Millennials are more interested in the technical aspects of Web 3.0 than older generations.

In general, the benefits of Web 3.0 are more appealing to Emerging markets than Developed markets.

#2

POTENTIAL IS THERE, BUT NOT YET READY FOR WIDE ADOPTION

77% stated that they had no idea about Web 3.0, with the remaining 23% claiming they heard about it and knew what it was about. However, only 1% of consumers have a good understanding of the concept.

Markets in NA, LATAM, and EMEA were less likely to have heard about Web 3.0, but markets in APAC have a poorer understanding of it. In APAC, more consumers have heard about Web 3.0, but they are less likely to grasp its meaning compared to other markets.

Education will prove crucial in building demand for Web 3.0 as it's shown that once respondents are properly informed about Web 3.0 from the survey, about half want and expect Web 3.0 to become more mainstream and widely used in the next year. This is even more true in emerging markets.

#3

THE METAVERSE'S PROMISING FUTURE

17% claim to have already ventured into the Metaverse—with Roblox and Sandbox being the most popular destinations—while 58% are eager to try it out. The hype is strongest in Emerging markets and among Gen Zs and Millennials.

Positive sentiment towards the Metaverse is growing, as it most elicits feelings like curiosity, excitement, and optimism. Again, these sentiments are strongest in Emerging markets.

Of those who are interested in experiencing the Metaverse, 65% would like to do so within the next year.

#4

SHOPPING AND EDUCATION PROVIDE AREAS OF OPPORTUNITY

Branded opportunities could be an area for Metaverse providers to expand outreach, as 78% of those who have experienced the Metaverse have taken part in a brand experience. This becomes even more important with 56% saying that they do not trust Metaverse providers.

Shopping (46%) is the top activity that people would like to explore in the Metaverse. While it is most popular in APAC and LATAM markets, it remains the most anticipated activity across all markets.

Educational content is another way to attract users. 54% believe in the value of online/virtual education, and this is most true among Gen Zs and Millennials. This is notable because of the general preference for in-person interaction across other activities.

#5

NOT YET COMPARABLE TO IN-PERSON INTERACTION

Across markets, one thing remains consistent: people still prefer in-person experiences over online/virtual ones. This includes shopping (60% in-person vs. 40% online), mingling (60% vs. 40%), and making meaningful connections (68% vs. 32%). Younger generations are more open to online/virtual experiences when it comes to social interactions (Gen Z 44%; Millennials 41%; Gen X 31%; Boomers 25%).

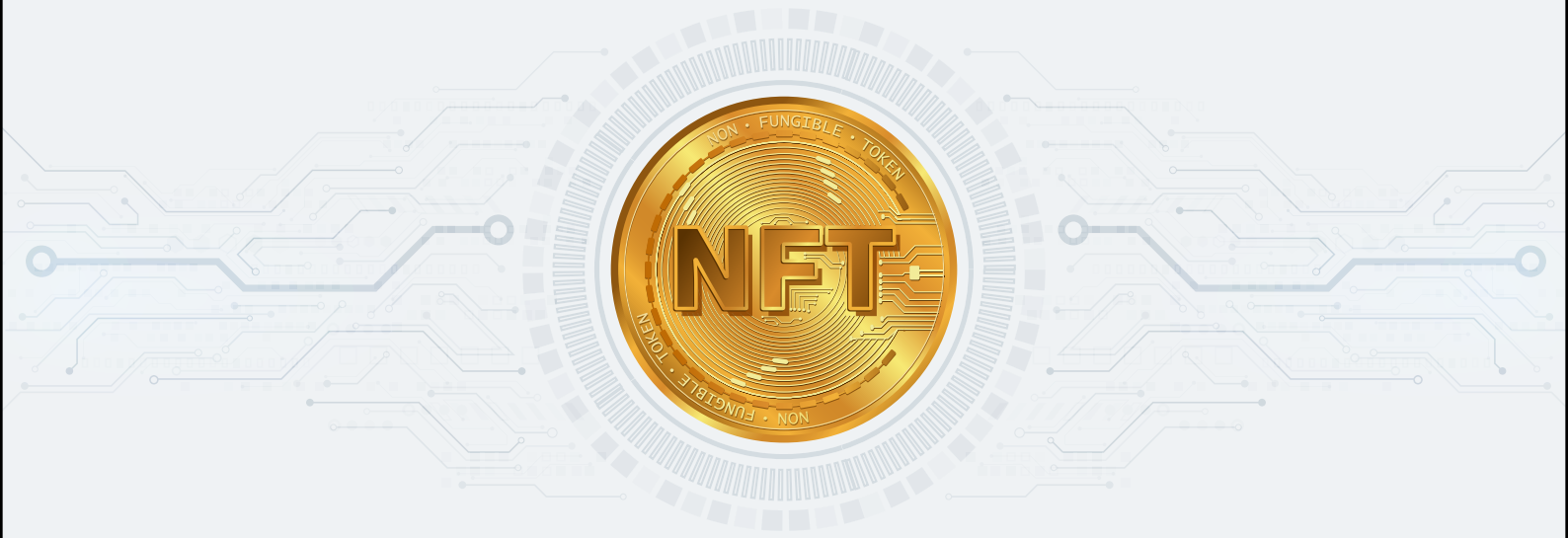
Nearly nine in ten (88%) have at least one concern about the Metaverse. The most common concerns include less human connection (31%), lack of privacy (31%), and identity theft (29%), and these concerns are equally strong across ages and markets.

#6

PROSPECTS ARE BRIGHT FOR THE NFT LANDSCAPE

45% of respondents have purchased virtual goods before, and 64% expressed interest in doing so. The current and future landscape skews toward Gen Zs (57% purchased, 76% interested) and Millennials (55% purchased, 74% interested), as well as Emerging markets in APAC (55% purchased, 74% interested) and LATAM (58% purchased, 72% interested).

Aside from the value in investment (24%), NFTs that enhance users' social experiences (24%) are of most interest. Gamers and those interested in fashion/ art are the key profiles to target. These trends are consistent across regions and age groups.



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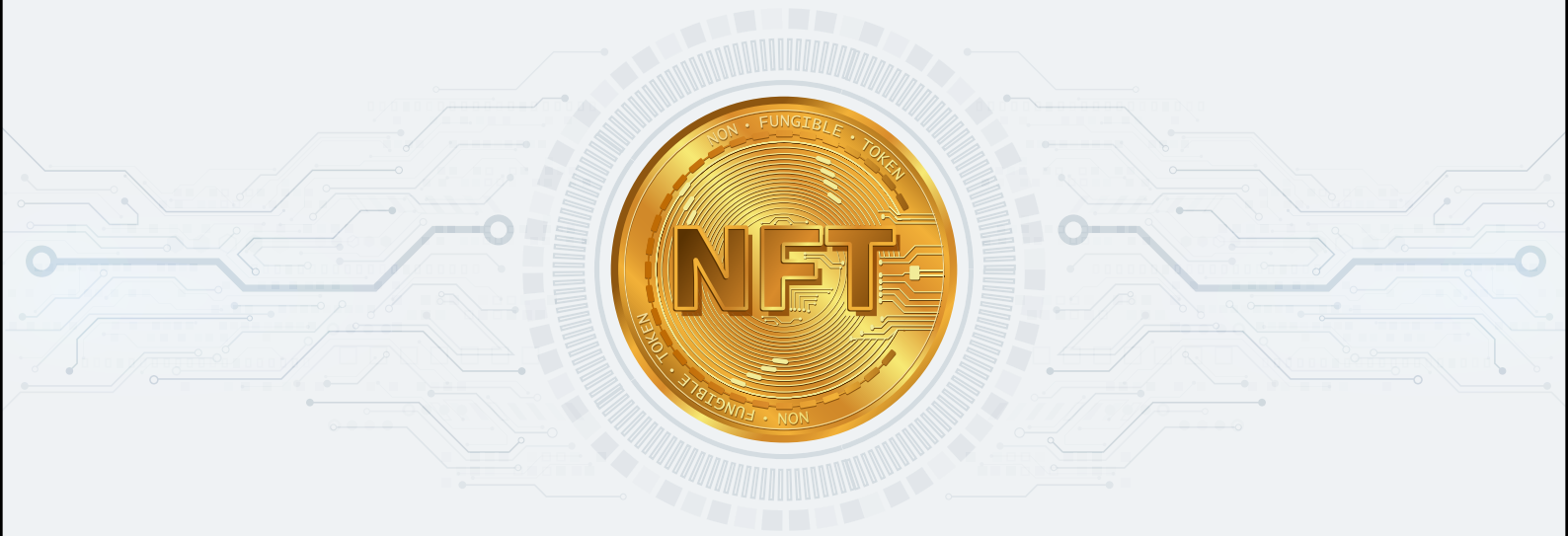
#7

PERTAINING MIXED FEELING AND LINGERING CONCERNS

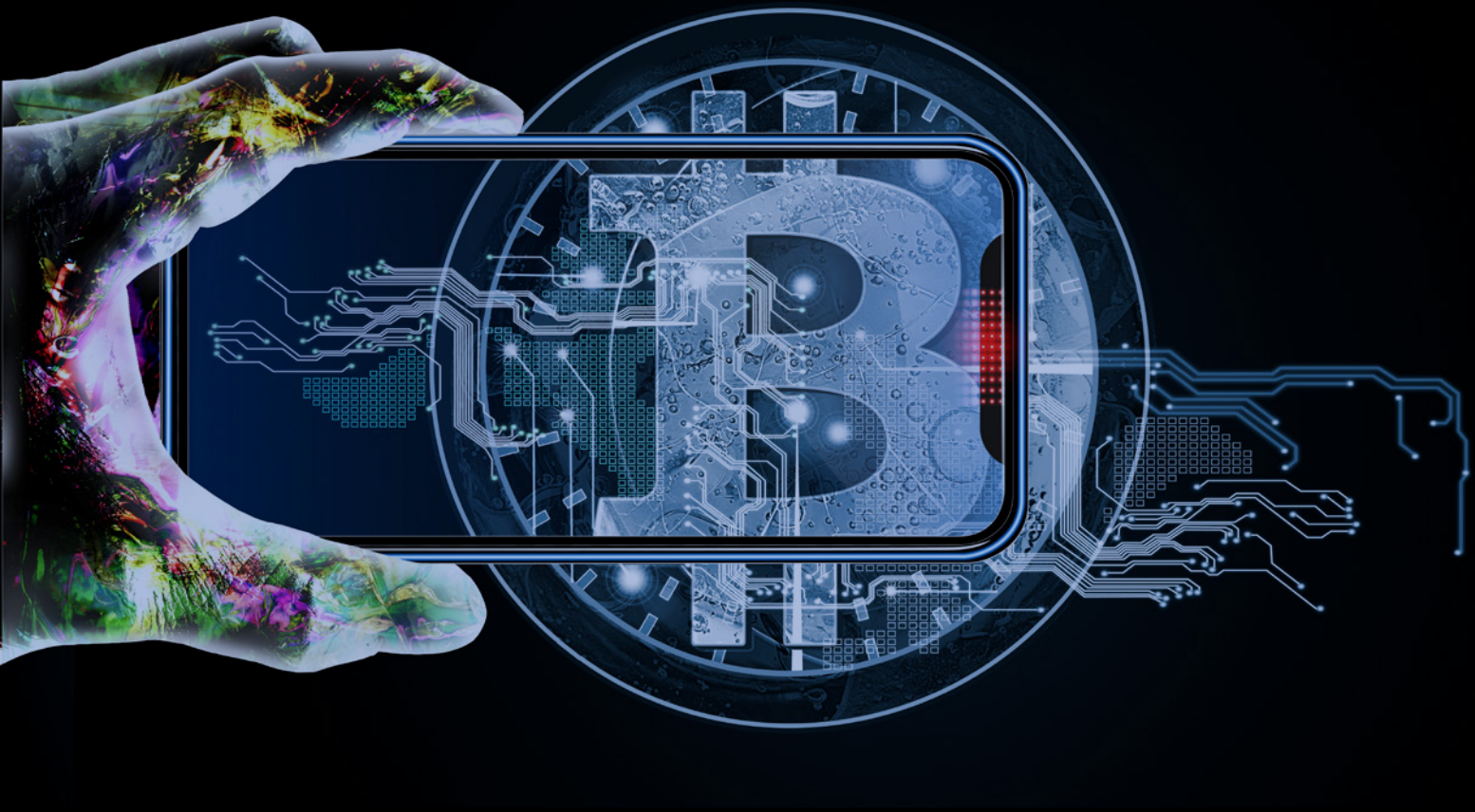
While consumers express curiosity and excitement about NFTs, people still express uncertainty and skepticism.

The majority of consumers do not feel that NFTs are secure when it comes to important documents, such as land deeds, academic certifications, or vehicle ownership certifications. Accordingly, they prefer physical copies of these documents rather than owning NFTs.

Nonetheless, there is still room to grow considering the public's limited understanding of NFTs at this time.



KEY FINDINGS



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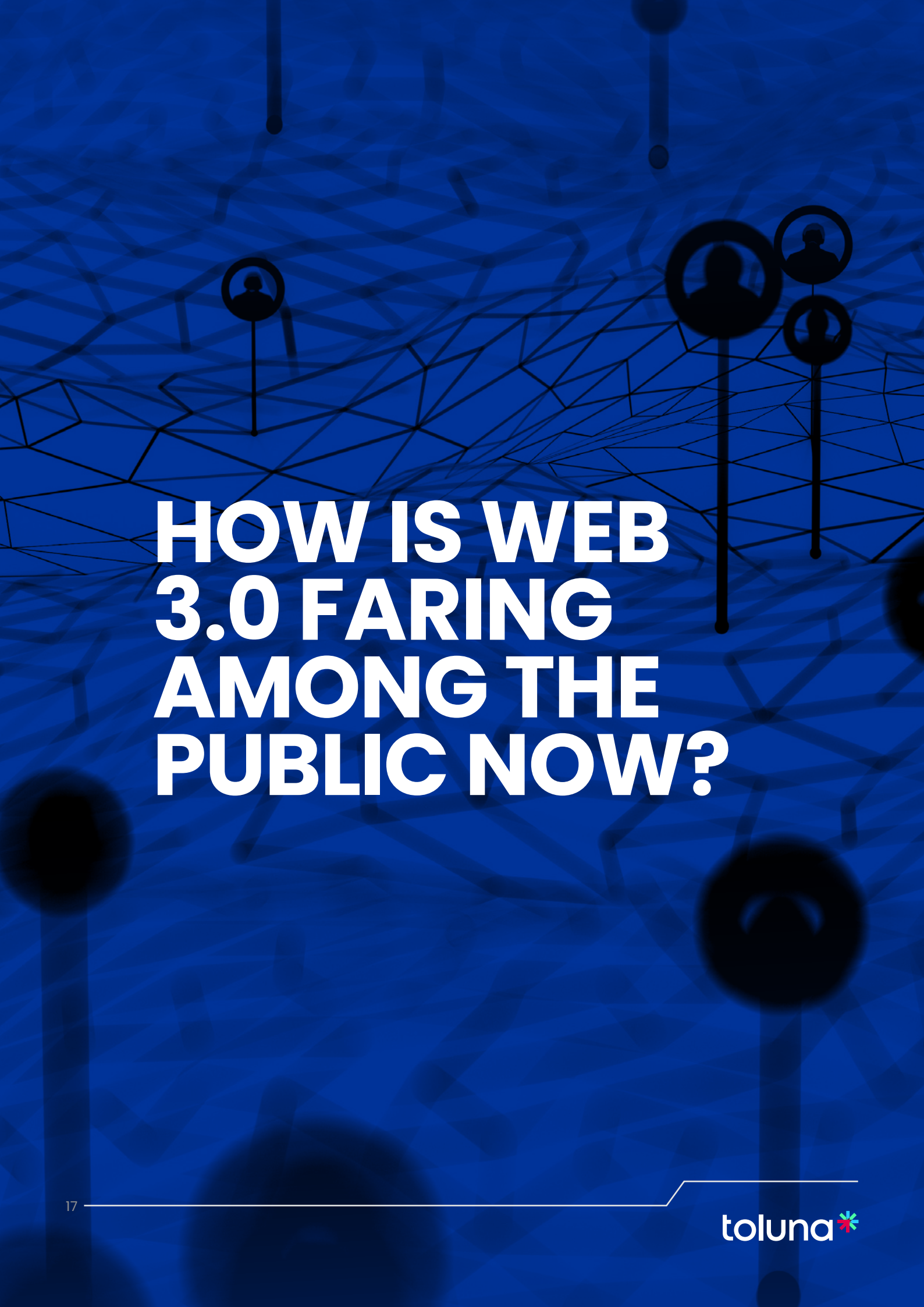
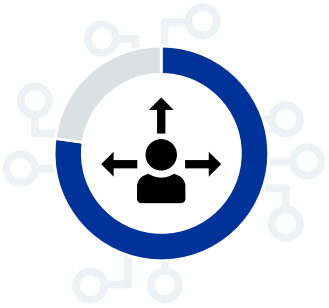
BLOCKCHAIN TECHNOLOGIES FROM MAJOR CRYPTO PLAYERS HAVE CONTINUED TO DRIVE THE DEVELOPMENT OF WEB 3.0

AS MANY ARE EMBRACING THE NOTION OF BLOCKCHAIN REVOLUTIONIZING THE WORLD, WHAT IS THE CURRENT OUTLOOK LIKE FOR WEB 3.0 & ITS APPLICATIONS?



HOW IS WEB 3.0 FARING AMONG THE PUBLIC NOW?

MAJORITY ARE STILL UNAWARE OF WEB 3.0; NA, LATAM, EMEA MARKETS ESPECIALLY HAVE LOWER AWARENESS

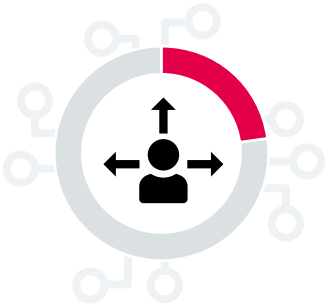


77%

Are either

i. completely unaware or

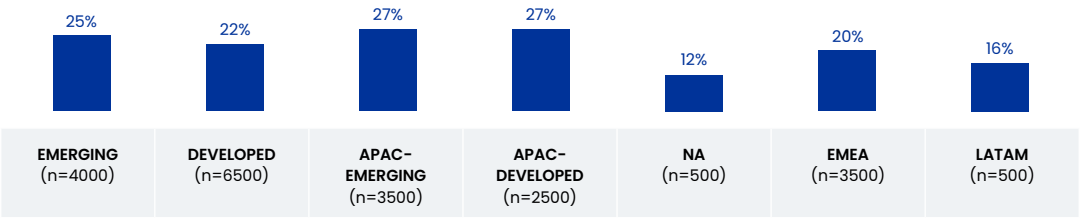
ii. aware but don't know what it means



23%

Are aware and know what it means

AWARENESS OF WEB 3.0 & KNOW WHAT IT MEANS (%)



Base: Total (n= 10,500)

B02. Have you heard of Web 3.0? (SA)
B03. In your own words, how would you describe Web 3.0? (OE)
B04. Which of these statements below do you think correctly describe Web 3.0? (MA)

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OVERALL UNDERSTANDING OF WEB 3.0 IS STILL LOW, APAC MARKETS HAVE POORER UNDERSTANDING DESPITE HIGHER AWARENESS

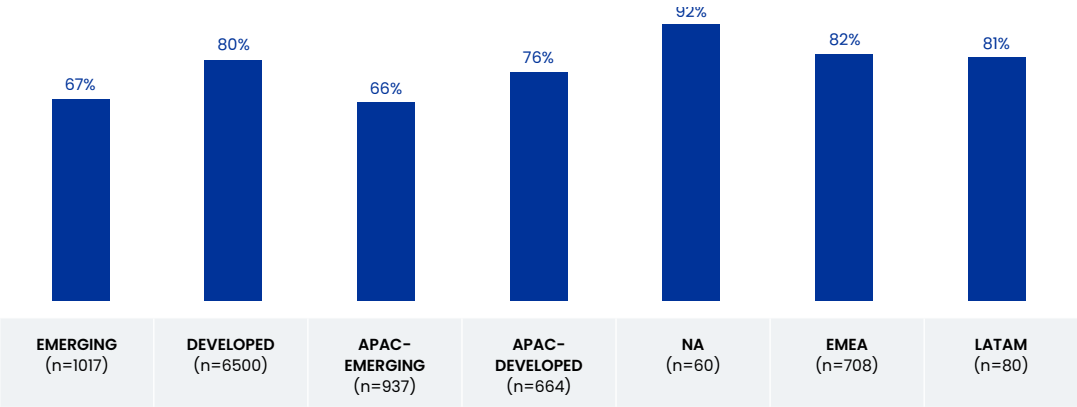
- Among those who claimed to know what it means, understanding level is still low to moderate.
- Few can describe the basic ideas of Web 3.0, but many understood the concept at a surface level or completely misunderstood it.

> It is a faster than fastest internet connections.

> The next evolution of the world wide web.

> Based on blockchain technology and incorporates concepts like decentralization.

UNDERSTANDING WEB 3.0 (MODERATE UNDERSTANDING %)

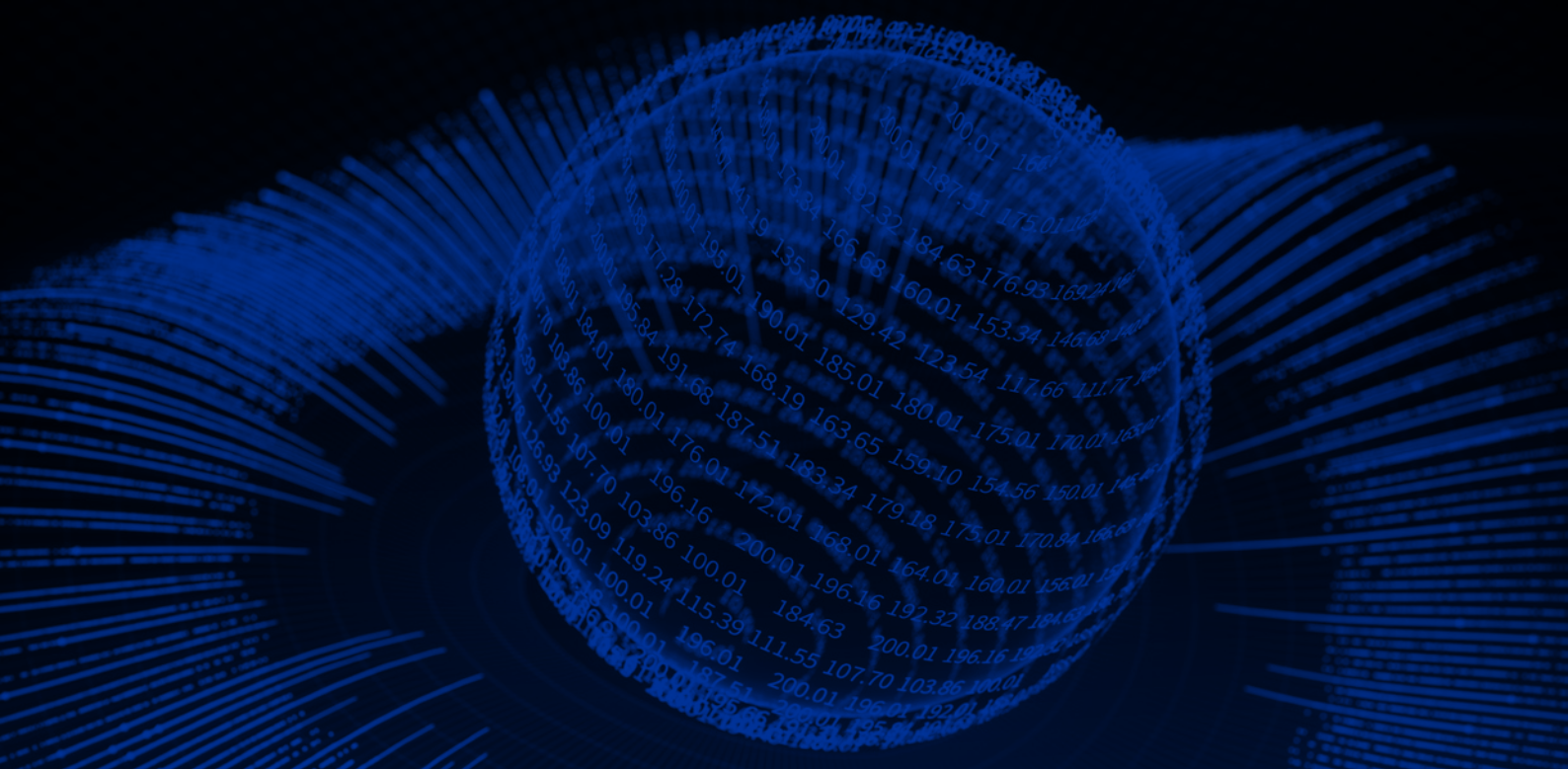


B09. Do you want Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)
B10. Do you expect Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)

WHAT IS WEB 3.0?

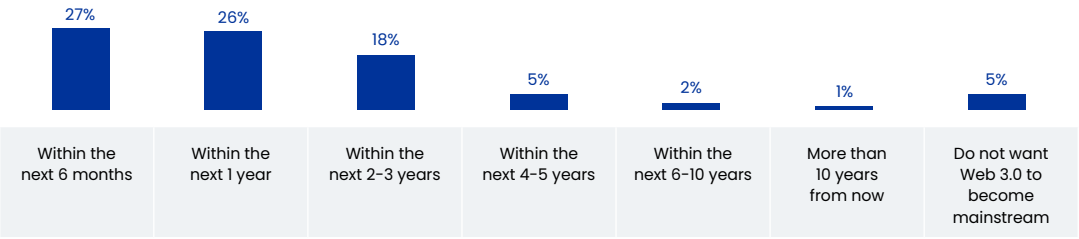
Web 3.0 (Web3) is the third generation of the evolution of web technologies.

Because Web 3.0 is still evolving and being defined, there isn't a universally accepted definition. What is clear, though, is that Web 3.0 will have a strong emphasis on decentralized applications and make extensive use of blockchain-based technologies. Web 3.0 will also make use of machine learning and artificial intelligence (AI) to help empower more intelligent and adaptive applications.

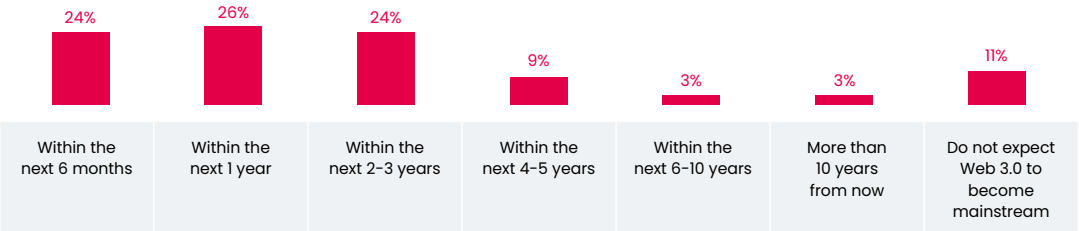


WHEN PROMPTED ABOUT WEB 3.0, CONSUMERS WANT & EXPECT IT TO BECOME MAINSTREAM SOON

WANT WEB 3.0 TO BECOME MAINSTREAM?



EXPECT WEB 3.0 TO BECOME MAINSTREAM?



Base: Total (n= 10,500)

B09. Do you want Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)
B10. Do you expect Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)

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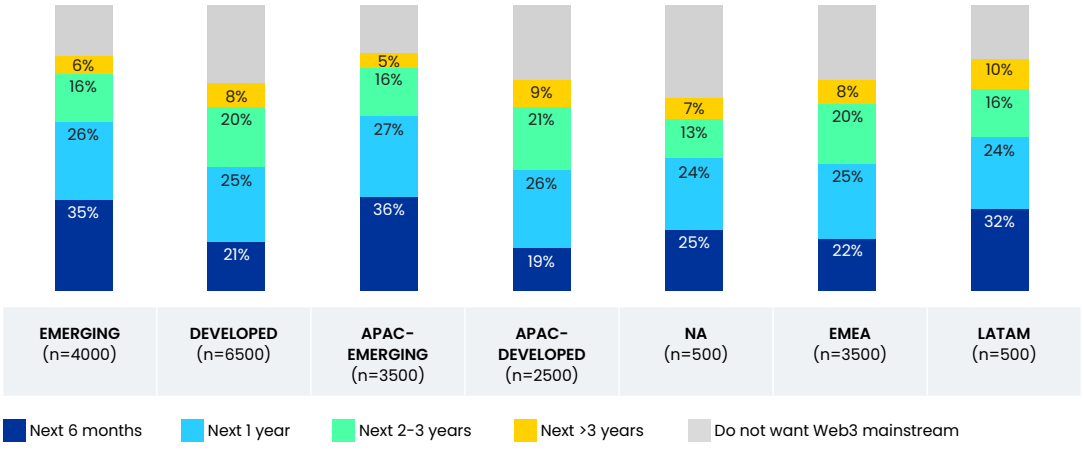
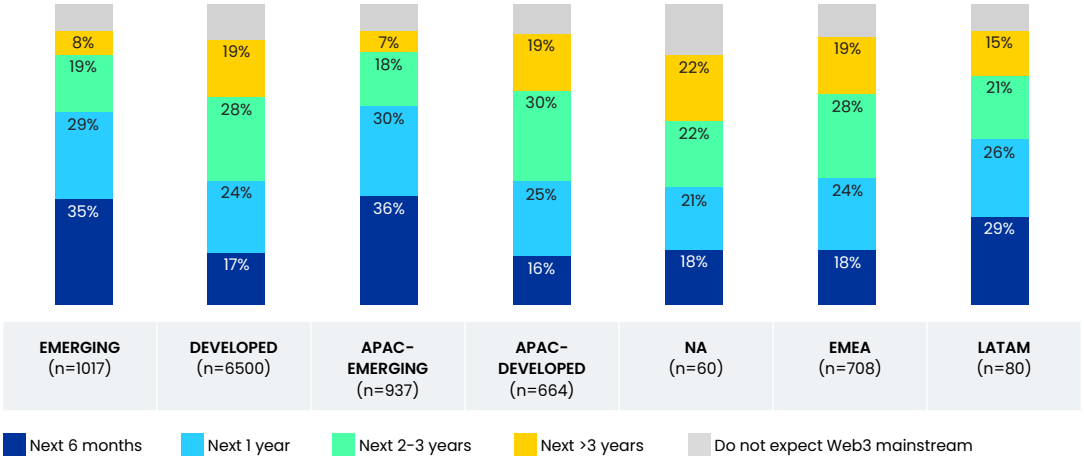
EMERGING MARKETS ESPECIALLY WANT & EXPECT WEB 3.0 TO COME SOON

WANT WEB 3.0 TO BECOME MAINSTREAM?



EXPECT WEB 3.0 TO BECOME MAINSTREAM?



B09. Do you want Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)
B10. Do you expect Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)

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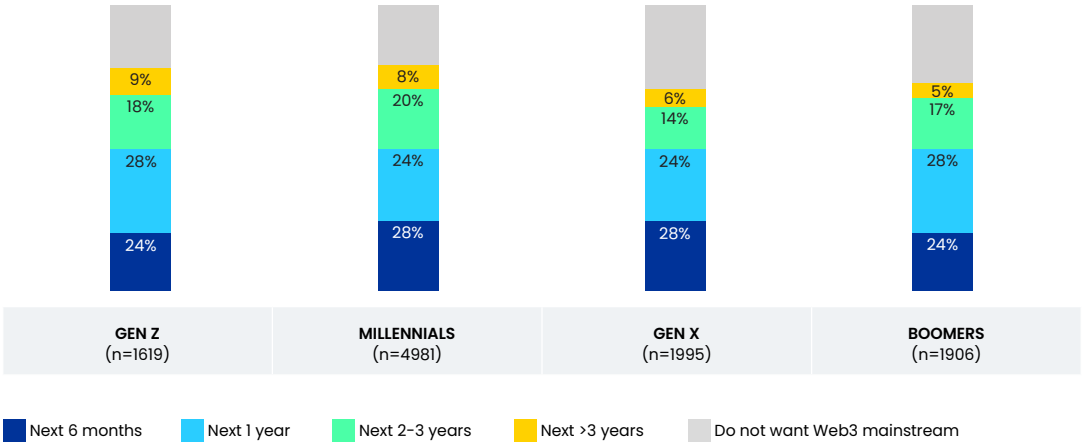
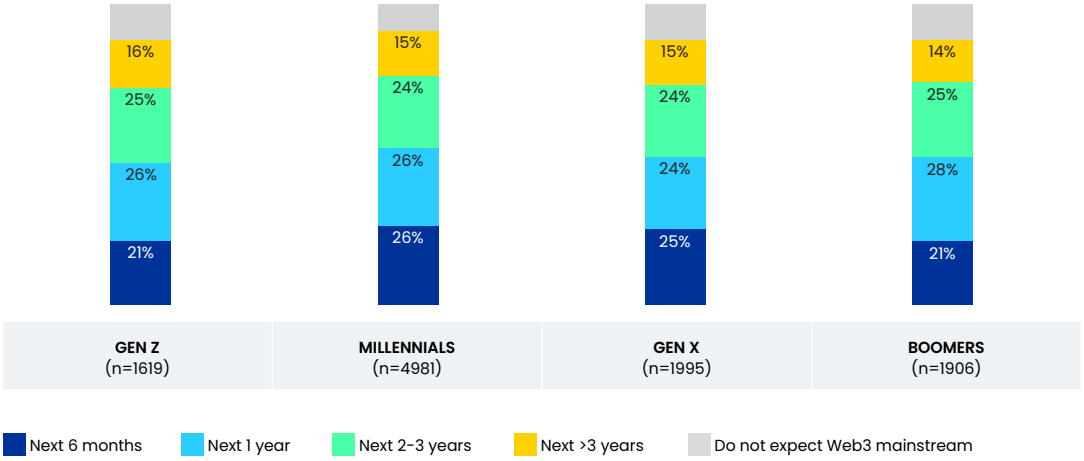
WHILE THE DEMAND FOR WEB 3.0 IS CONSISTENT ACROSS GENERATIONS

WANT WEB 3.0 TO BECOME MAINSTREAM?



EXPECT WEB 3.0 TO BECOME MAINSTREAM?



B09. Do you want Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)
B10. Do you expect Web 3.0 to become mainstream & more widely used? If yes, how soon? (SA)

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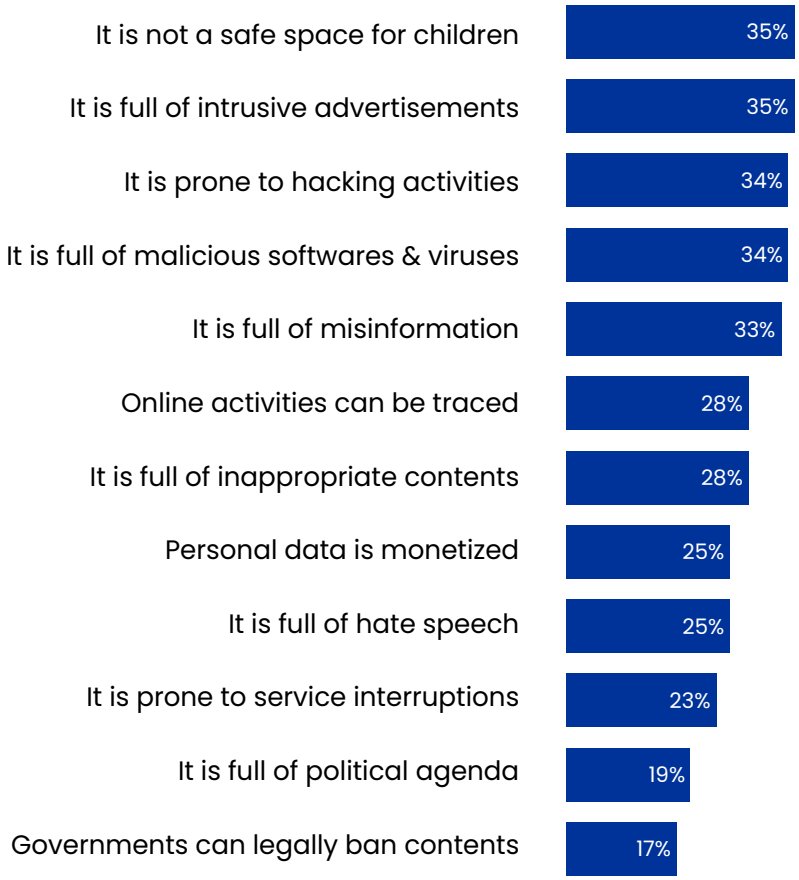
WHAT IS THE PUBLIC EXPECTING FROM WEB 3.0?

WHAT DO CONSUMERS THINK ABOUT THE CURRENT INTERNET LANDSCAPE?

It's not safe for children, cybercrimes & misinformation are rampant, but consumers are also becoming aversive towards intrusive ads, having their online activities traced and being monetized for it; All these are consistent across regions & generations



Base: Total (n= 10,500)

B01. What factors of the current internet landscape are you most unsatisfied about? You may select up to 5 options from the list below. (MA, MAX 5)

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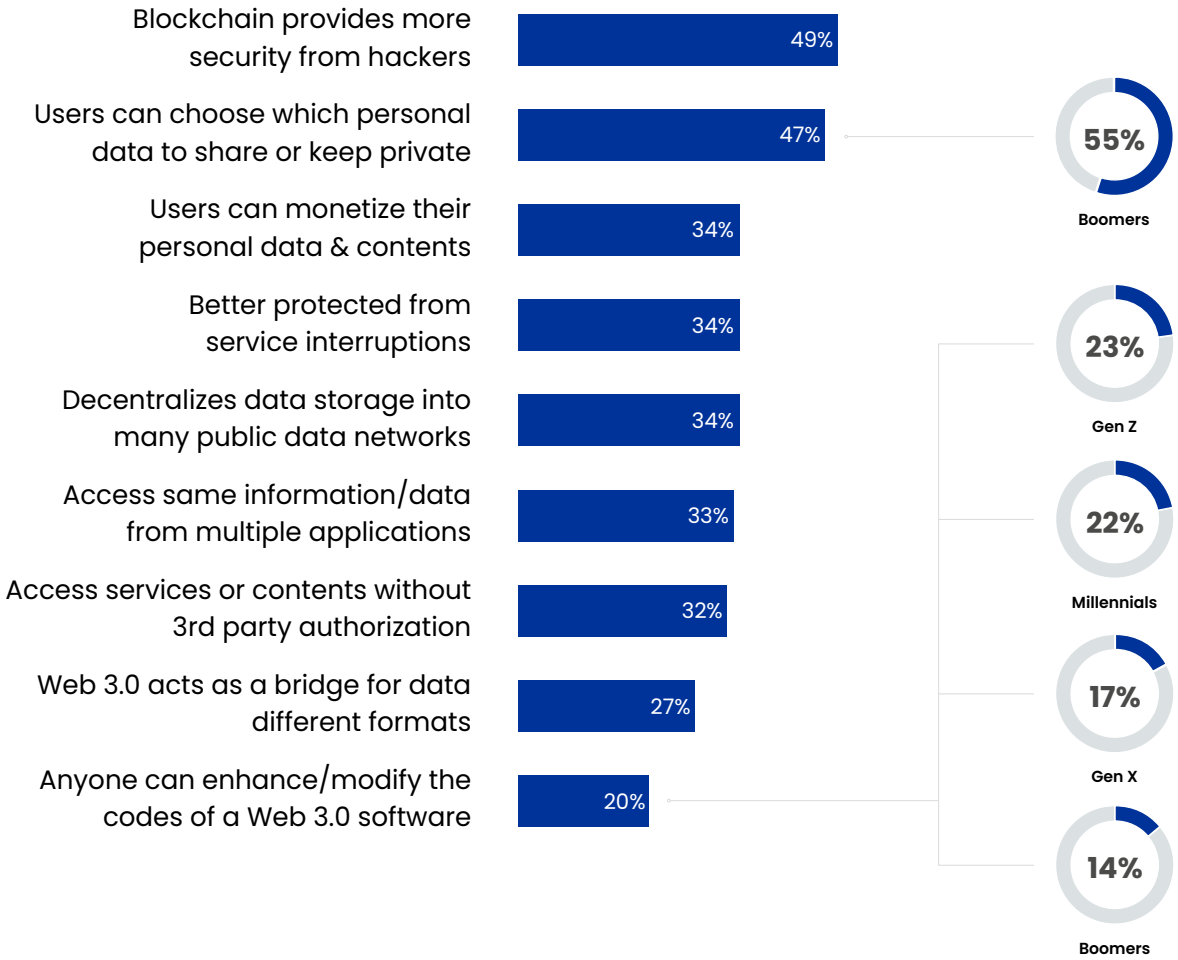
WHAT ASPECTS OF WEB 3.0 ARE CONSUMERS MOST LOOKING FORWARD TO?

Aside from better security from hackers, consumers mainly want complete control over their personal data. Should consumers choose to not share their data, this means that companies can no longer make use of private data for marketing & advertising



Base: Total (n= 10,500)

B07. Here is a list of key characteristics of Web 3.0, which of these are you most looking forward to? You may select up to 5 options from the list below. (MA, MAX 5)

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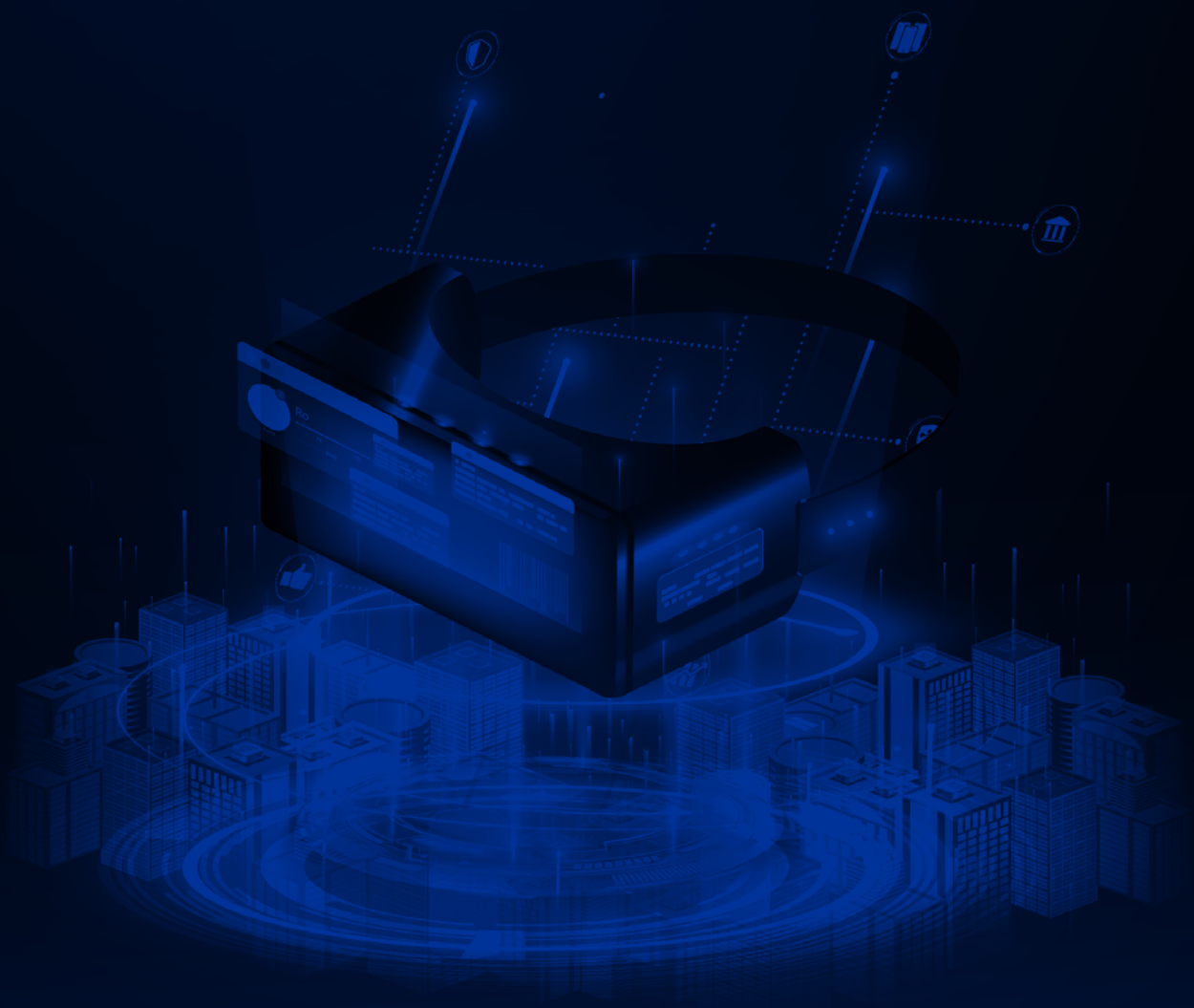
POPULAR EXAMPLES OF WEB 3.0 TODAY

METAVERSE

NFT

METAVERSE – THE HYPE & THE LANDSCAPE



8 IN 10 ARE ALREADY AWARE OF THE METAVERSE BUT ONLY 1 IN 3 KNOW WHAT IT MEANS

Have not heard of the metaverse
21%

Have heard of the metaverse but not sure what it is
43%

Have heard of the metaverse and know what it means
36%

VIRTUAL REALITY/WORLD
Majority can correctly describe virtual reality or virtual world in their answers of what the metaverse is.

FACEBOOK/META
But many also associate the word to Facebook or Meta in their description.

> 3D virtual platform where users around the world can interact with each other in avatar form.

> It's Facebook and everything Facebook related.

> 3D virtual world like the real world where users can trade land, buildings and other digital assets in the metaverse.

Base: Total (n= 10,500)

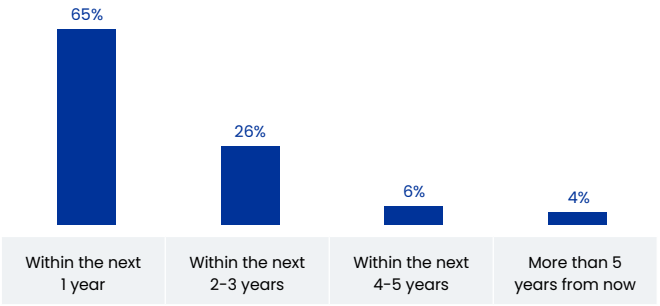
D01. Have you heard of the Metaverse? (SA)
D02. In your own words, how would you describe the metaverse? (OE)

ADOPTION IS STILL IN ITS EARLY PHASE, BUT MANY WANT TO EXPERIENCE THE METAVERSE SOON

HAVEN'T EXPERIENCED THE METAVERSE, BUT ARE INTERESTED

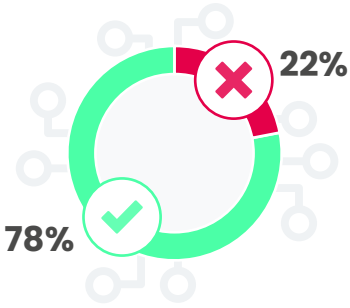
58%

WHEN?



HAVE EXPERIENCED THE METAVERSE

17%



ANY BRAND EXPERIENCE?

> Visited Samsung 837X, a digital version of its New York store.

SAMSUNG

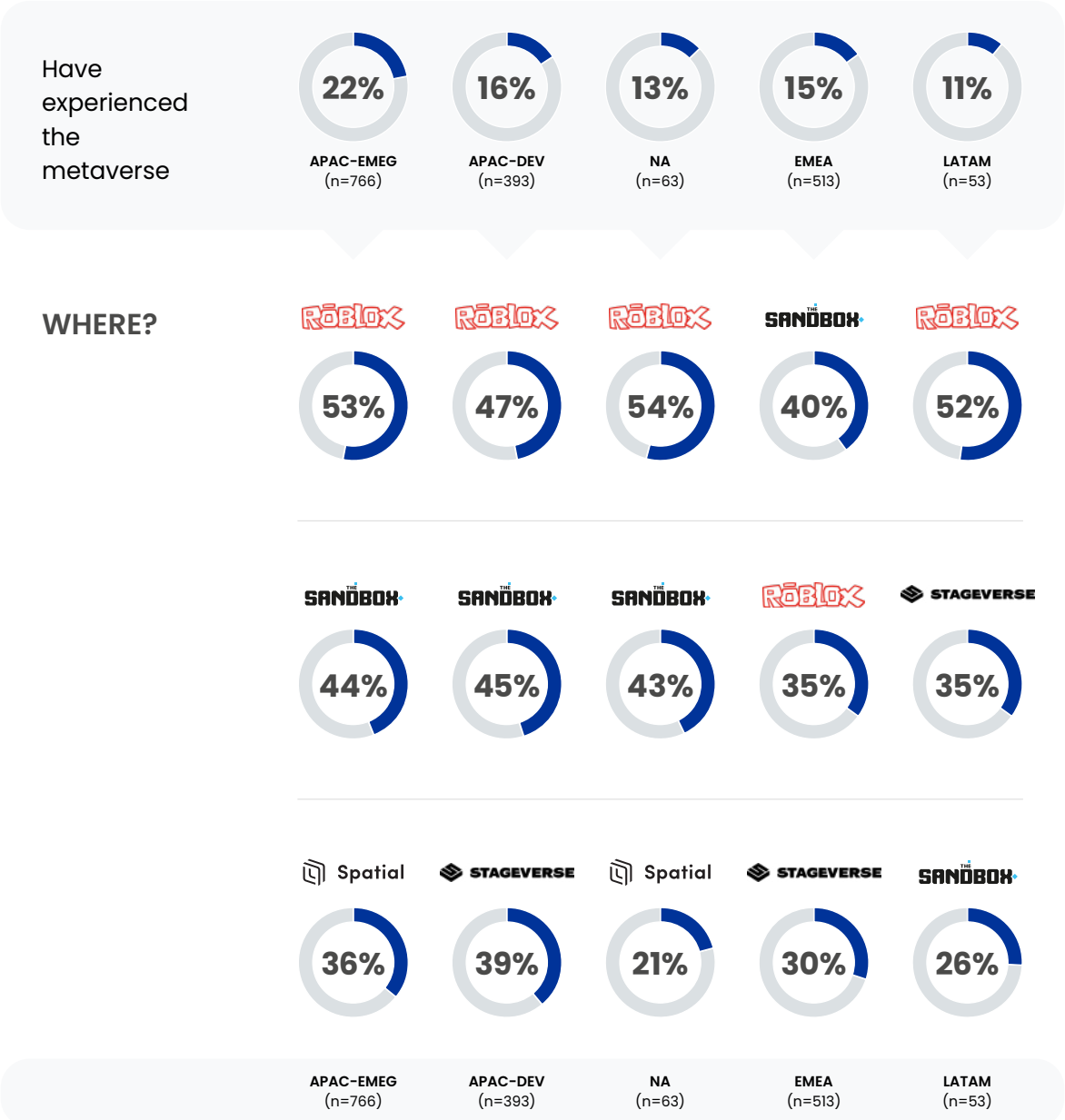
> Buying apparel like Adidas or Nike. I think they are very popular brands in metaverse.

adidas

Base: Total (n= 10,500)

D04. Do you have any experience with the metaverse? (SA)
D05. When do you intend to hop into the metaverse? (SA)
D08. Do you have any brand-related experience in the metaverse so far? (e.g. apparel brands, tech brands, food & beverage brands) (SA)
D09. Can you elaborate as detailed as possible, what brand(s) was it/were they, and what did you experienced? (OE)

PEOPLE FROM ACROSS THE GLOBE VISIT THE METAVERSE, WITH EMERGING APAC MARKETS CURRENTLY LEADING



D04. Do you have any experience with the metaverse? (SA)
D06. Which Metaverse platform(s) have you visited so far? (MA)

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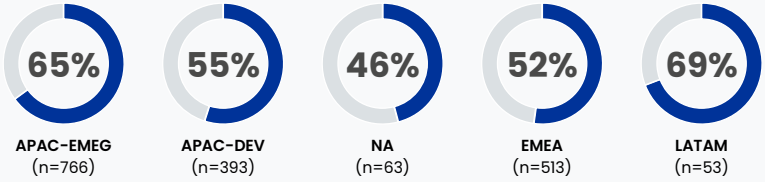
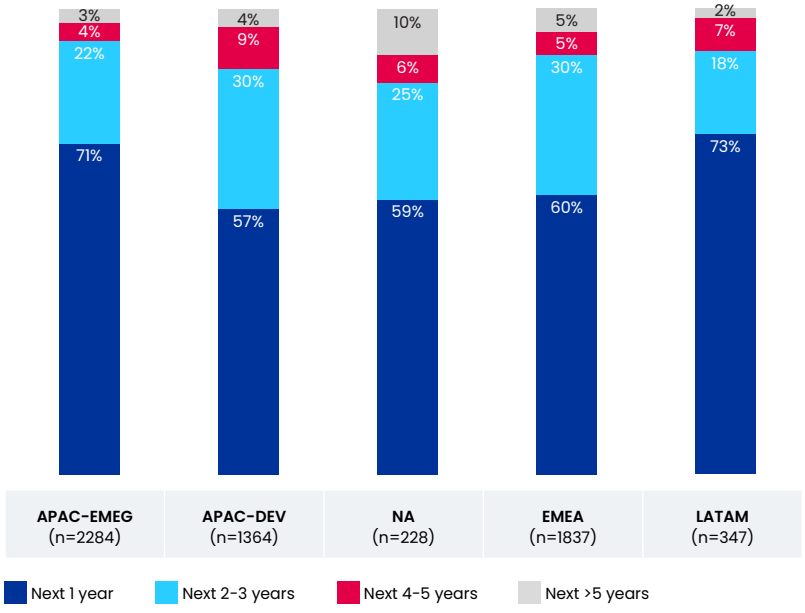
EMERGING APAC MARKETS ARE EXPECTED TO WIDEN THE LEAD, BUT LATAM MARKETS ARE CATCHING UP AS WELL

Intend to experience the metaverse



WHEN?



D04. Do you have any experience with the metaverse? (SA)
D05. When do you intend to hop into the metaverse? (SA)

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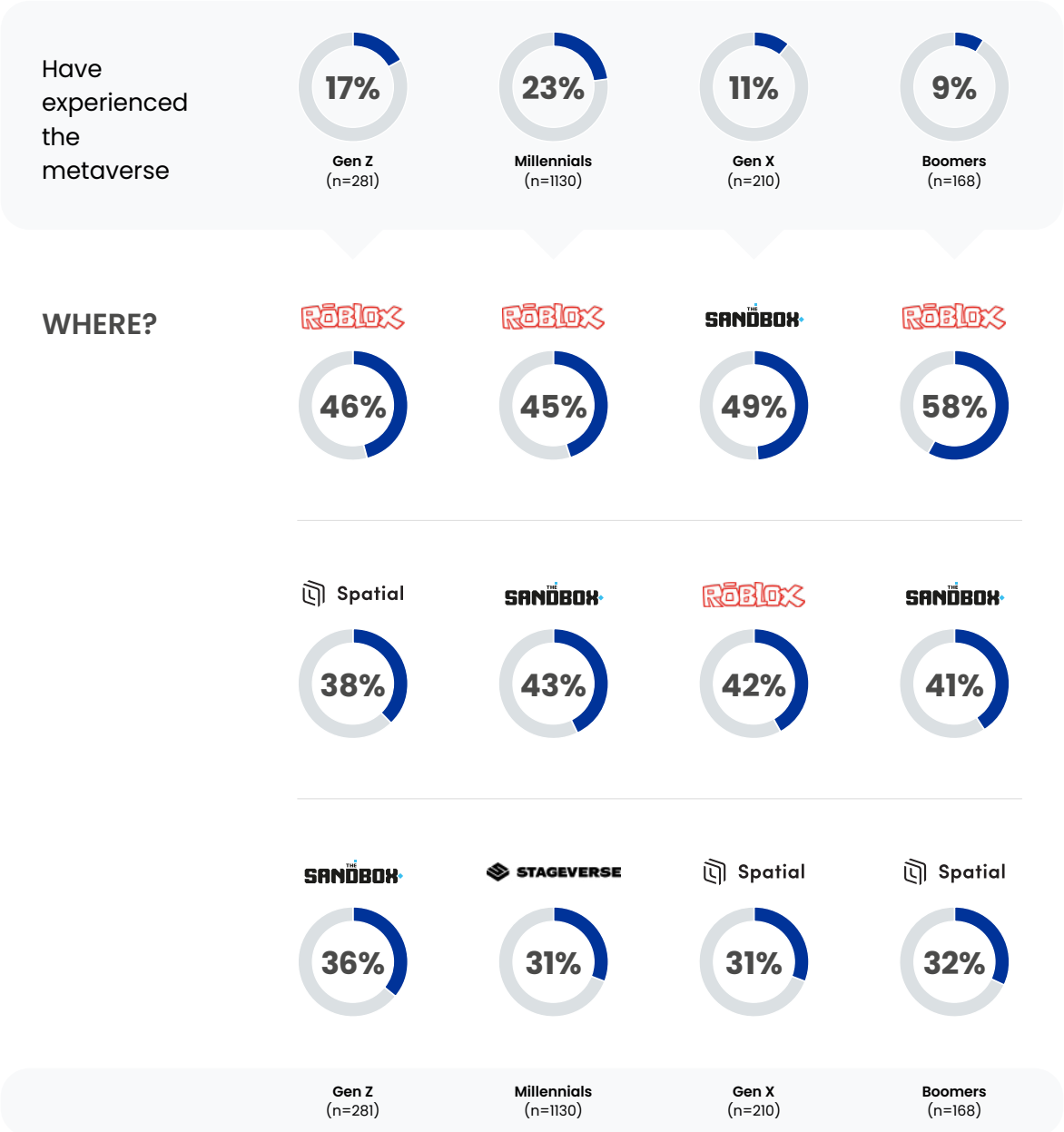
AS EXPECTED, CURRENT METAVERSE VISITORS TEND TO BE YOUNGER...



D04. Do you have any experience with the metaverse? (SA)
D06. Which Metaverse platform(s) have you visited so far? (MA)

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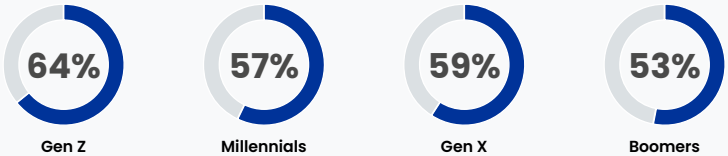
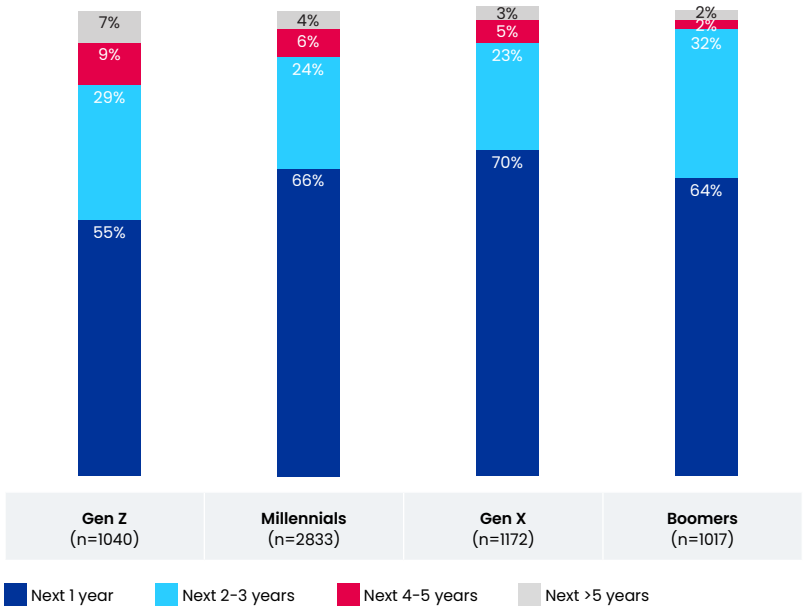
...THOUGH INTEREST IN THE METAVERSE SPANS ACROSS GENERATIONS

Intend to experience the metaverse



WHEN?



D04. Do you have any experience with the metaverse? (SA)
D05. When do you intend to hop into the metaverse? (SA)

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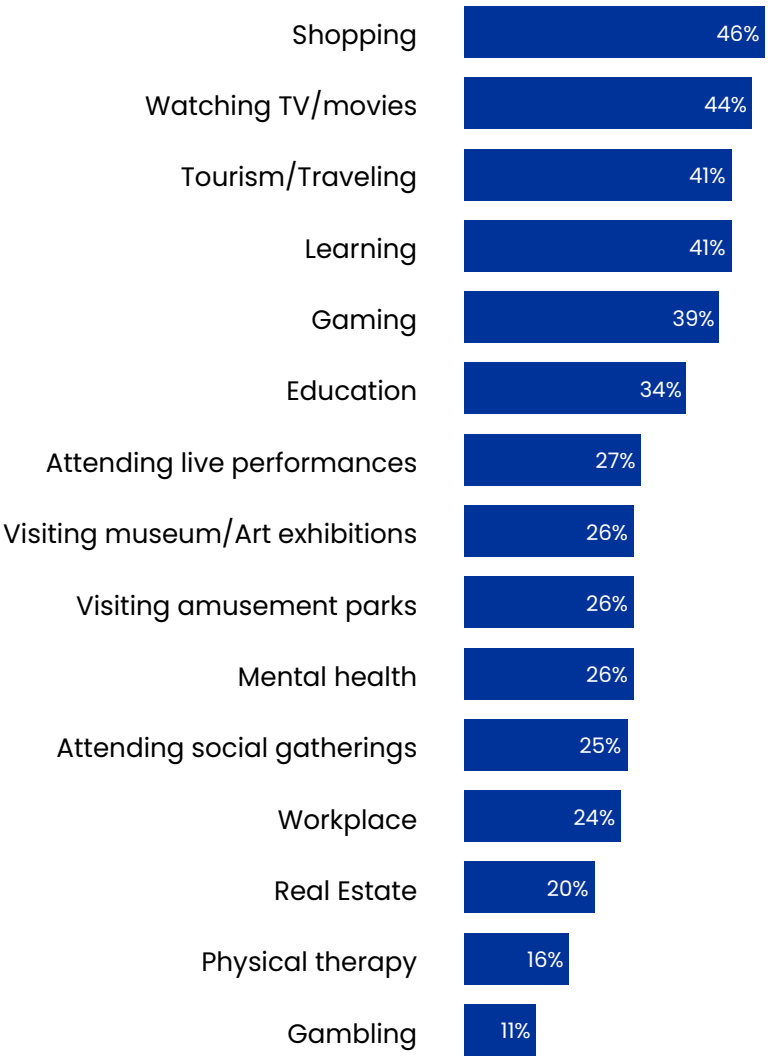
WHAT ARE THE OPPORTUNITIES IN THE METAVERSE?

WHAT KINDS OF METAVERSE EXPERIENCES INTEREST CONSUMERS THE MOST?

Naturally, consumers find fun in-person activities to be interesting in the Metaverse. However, they're also very interested in applications of the Metaverse involving learning and education.



Base: Those interested in the metaverse (n= 7,850)

D10. What activities would you be interested in experiencing in the metaverse? (MA)

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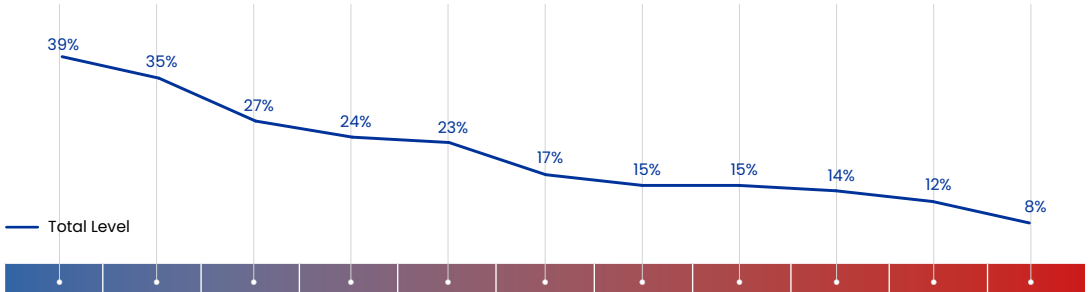
CONSUMERS ARE FEELING POSITIVE ABOUT THE METAVERSE, WITH EMERGING MARKETS SHOWING GREATER ENTHUSIASM THAN DEVELOPED MARKETS



	CURIOUS	EXCITED	OPTIMISTIC	INSPIRED	INTRIGUED	UNSURE	SKEPTICAL	CONFUSED	INDIFFERENT	CONCERNED	CONFLICTED
APAC-EMERG (N=3500)	48%	50%	33%	35%	27%	15%	11%	13%	10%	14%	8%
APAC-DEV (N=2500)	39%	31%	28%	21%	24%	22%	16%	15%	14%	11%	8%
NA (N=500)	33%	24%	20%	15%	20%	31%	22%	16%	15%	16%	7%
EMEA (N=3500)	30%	23%	20%	16%	21%	16%	18%	15%	18%	11%	10%
LATAM (N=500)	53%	34%	39%	30%	21%	11%	5%	19%	11%	12%	7%

Significantly higher vs total Significantly Lower vs total

D12. How do you feel about the metaverse? Please select all that apply. (MA)

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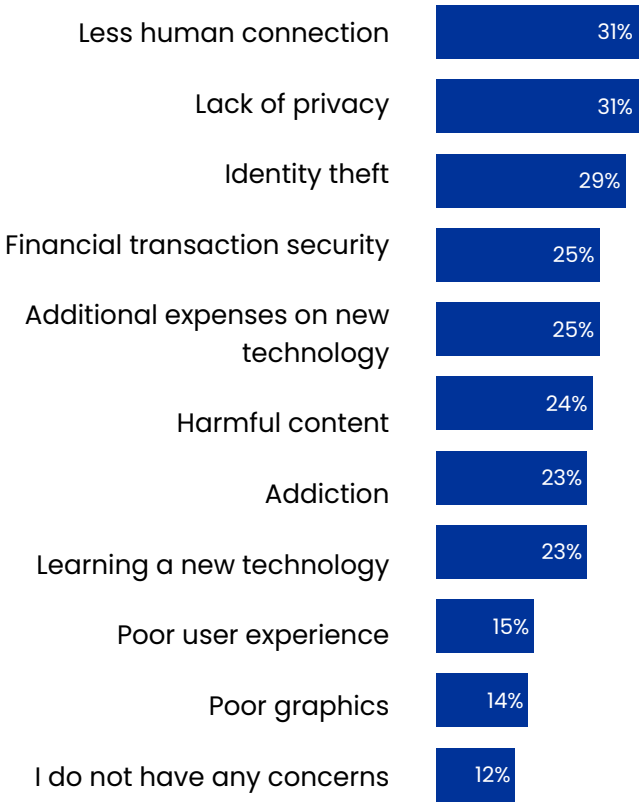
BUT THERE ARE STILL LINGERING CONCERNS OVER THE METAVERSE...

Concerns mainly surround security and fear of isolation from real, human connections. This is true across regions and generations.



Base: Total (n= 10,500)

D13. Which, if any, concerns do you have about the metaverse in general? (MA)

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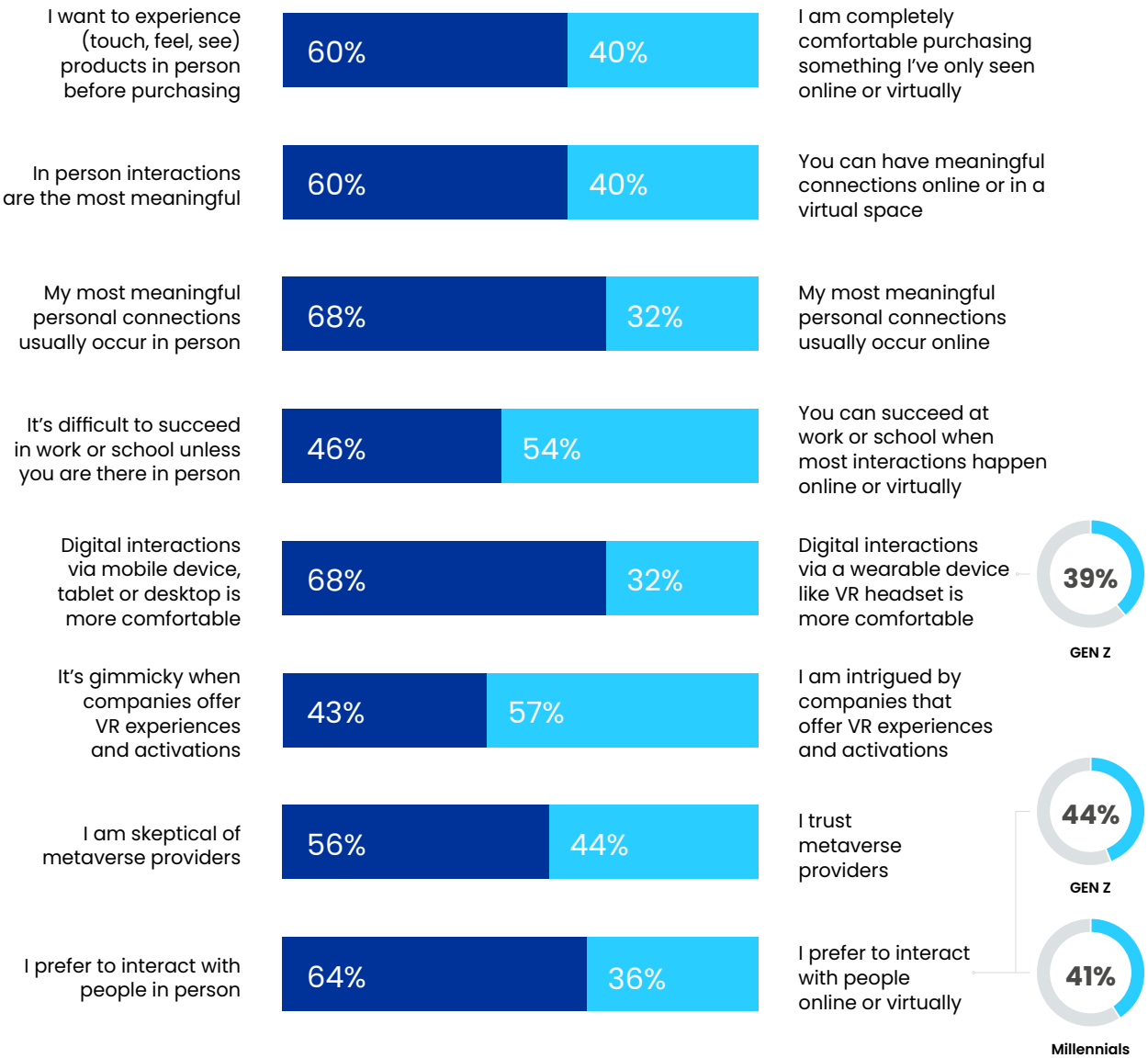
PREFERENCE STILL LEANS TOWARDS IN-PERSON INTERACTIONS

However, consumers are intrigued by virtual brand experiences, and they believe in the efficacy of online/ virtual school and work.



Base: Total (n= 10,500)

D14. Below are pairs of statements. For each pairing, please indicate whether you agree more with statement A or statement B. (SA)

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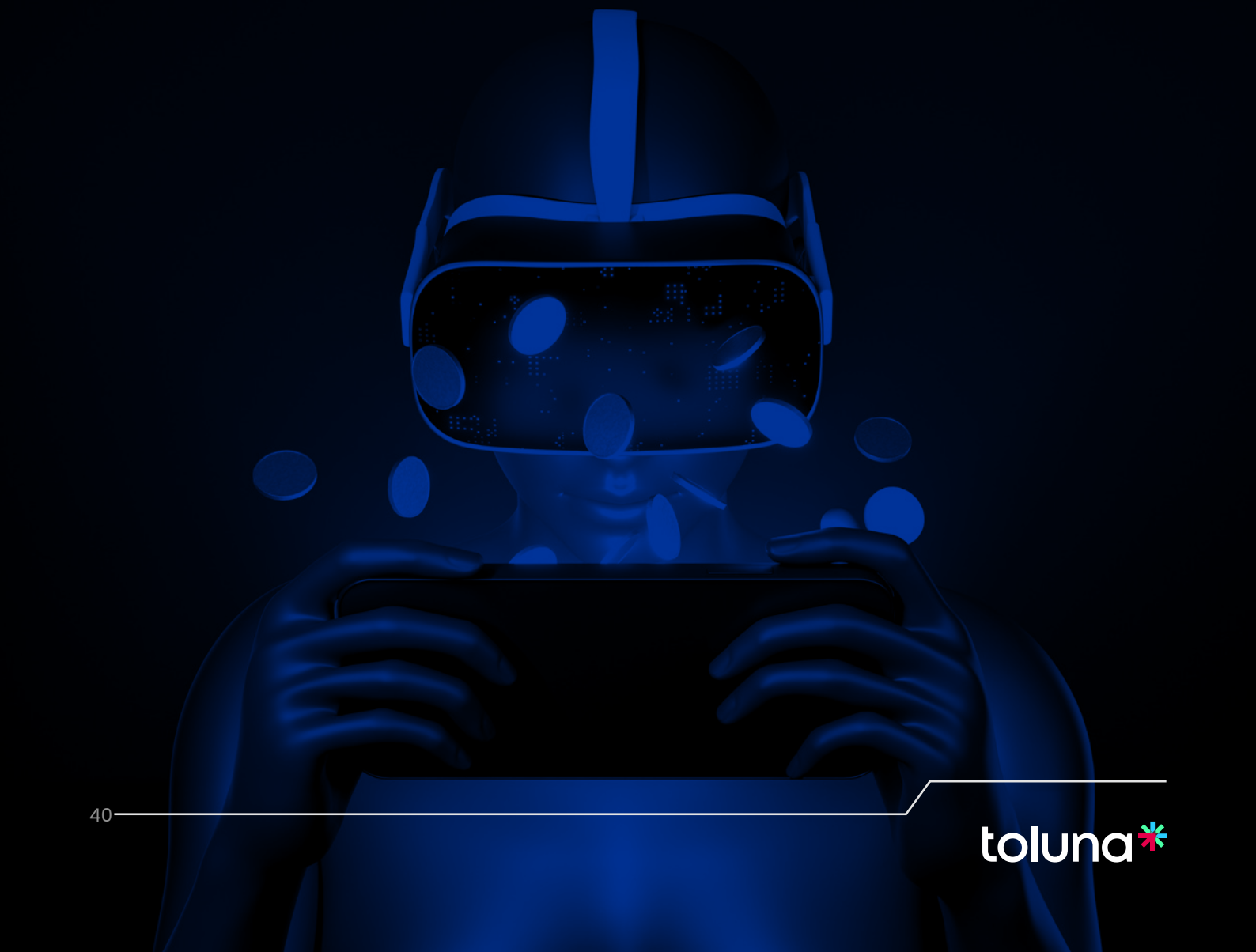
NFTS: BOOSTING THE CONSUMPTION OF VIRTUAL GOODS?



7 IN 10 HAVE HEARD OF NFTS, BUT ONLY 1 IN 3 UNDERSTAND THEM AT SURFACE LEVEL

Have not heard of NFTs
30%

Have heard of NFTs, but are not sure what they are
41%

Have heard of NFTs and know what they are
29%

DIGITAL ASSET
'Digital asset' is the most common term that consumers use to define NFTs

> A digital asset with unique identification code and metadata.

BLOCKCHAIN
Many correctly referenced the blockchain as an essential element of NFTs

> It is unique digital identifier that cannot be copied in a blockchain.

ART
'Art' also emerged as one of the most-used terms to describe NFTs. In fact, 47% think all NFTs are just artworks and digital images.

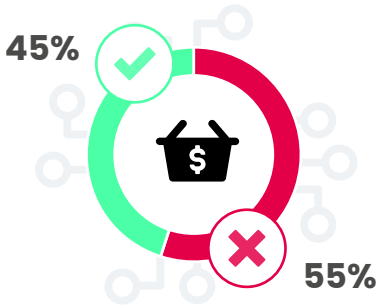
> It's digital artwork that people pay for.

E01. Have you heard of non-fungible tokens (NFT)? (SA)
E02. In your own words, how would you describe the NFT? (OE)

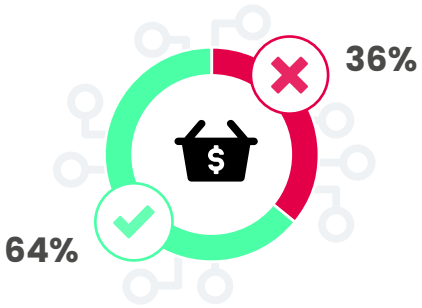
ARE CONSUMERS INTERESTED IN VIRTUAL GOODS?

40-50% said they have purchased virtual goods, while close to 70% said they are interested to purchase in the future, expressing a relatively widespread scope of interest

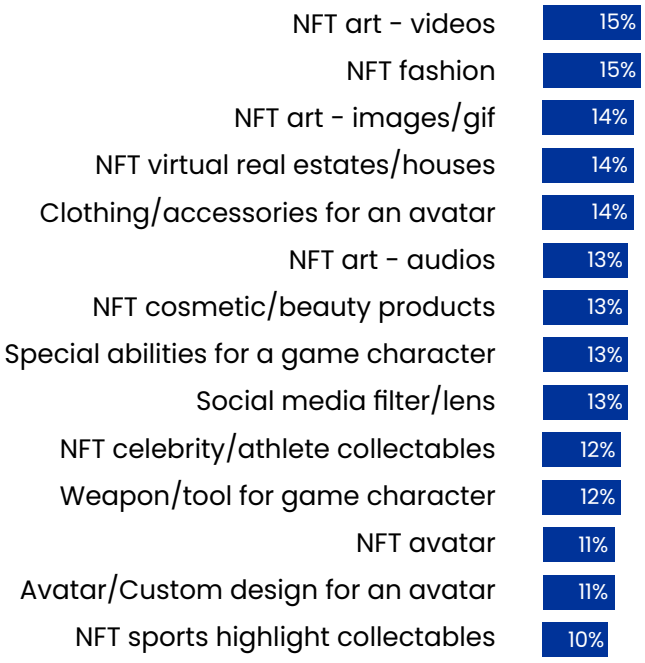
PURCHASED VIRTUAL GOODS BEFORE?



INTERESTED TO PURCHASE?



WHICH OF THESE ARE YOU INTERESTED IN?



Base: Total (n= 10,500)

E06. Which, if any, of the following digital products/virtual goods have you ever purchased? We are referring only to objects and/or currencies you have used in video games and other metaverse activities. (MA)
E07. And which of these are you interested to purchase in the future? (MA)

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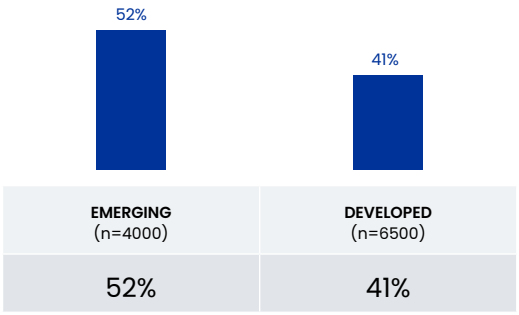
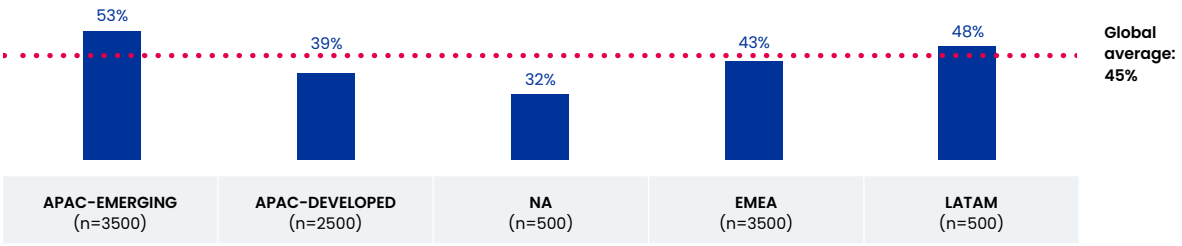
CONSUMERS IN EMERGING MARKETS ARE MORE LIKELY TO HAVE PURCHASED NFTS

PURCHASED VIRTUAL GOODS BEFORE?

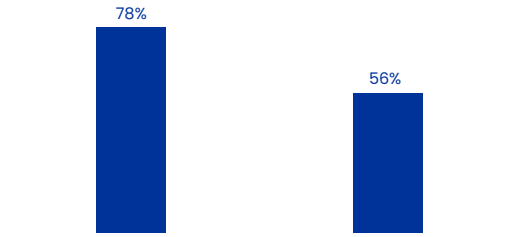




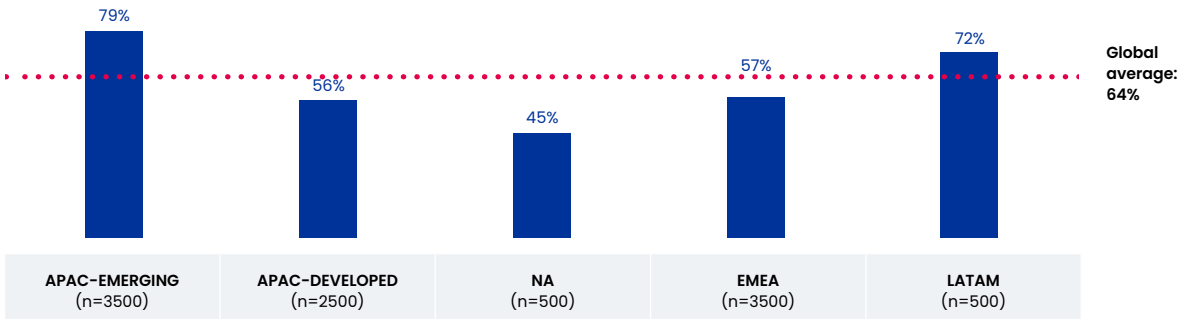
E06. Which, if any, of the following digital products/virtual goods have you ever purchased? We are referring only to objects and/or currencies you have used in video games and other metaverse activities. (MA)

THE NFT LANDSCAPE WILL CONTINUE TO SKEW TOWARDS EMERGING MARKETS AS INTEREST SOARS HIGHER THAN IN DEVELOPED MARKETS

INTERESTED IN PURCHASING VIRTUAL GOODS?



EMERGING (n=4000)	DEVELOPED (n=6500)
78%	56%



APAC-EMERGING (n=3500)	APAC-DEVELOPED (n=2500)	NA (n=500)	EMEA (n=3500)	LATAM (n=500)

E07. And which of these are you interested to purchase in the future? (MA)

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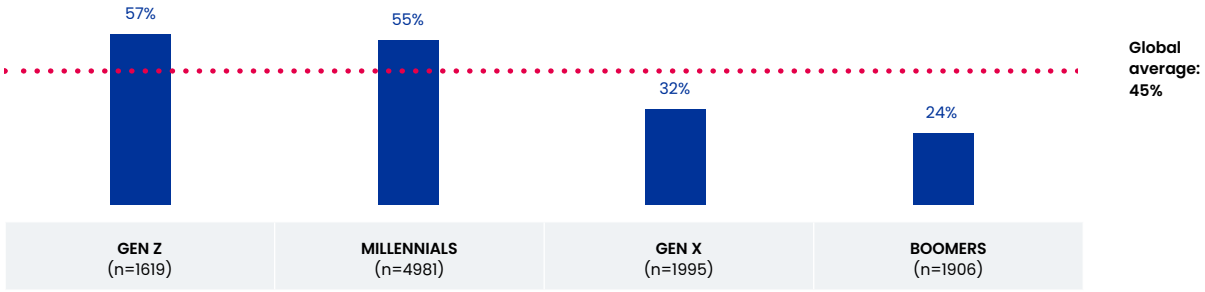
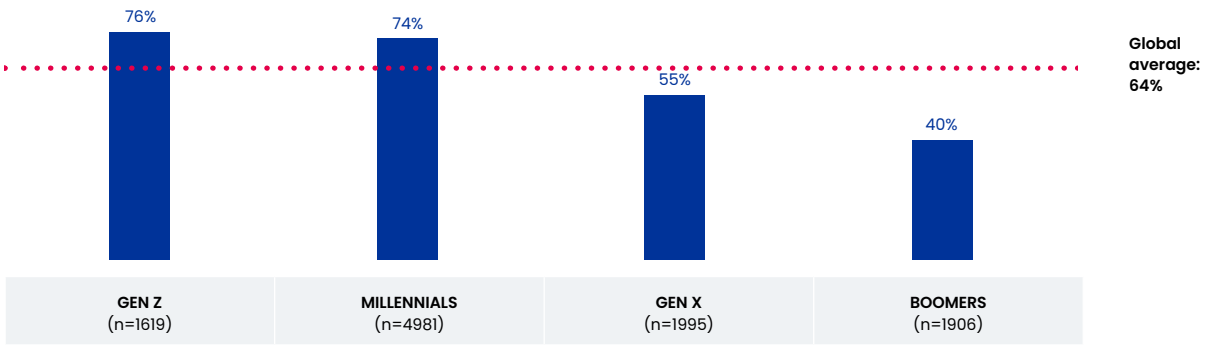
YOUNGER GENERATIONS ARE MORE LIKELY TO DABBLE IN NFTS

PURCHASED VIRTUAL GOODS BEFORE?



INTERESTED IN PURCHASING VIRTUAL GOODS?



E06. Which, if any, of the following digital products/virtual goods have you ever purchased? We are referring only to objects and/or currencies you have used in video games and other metaverse activities. (MA)
E07. And which of these are you interested to purchase in the future? (MA)

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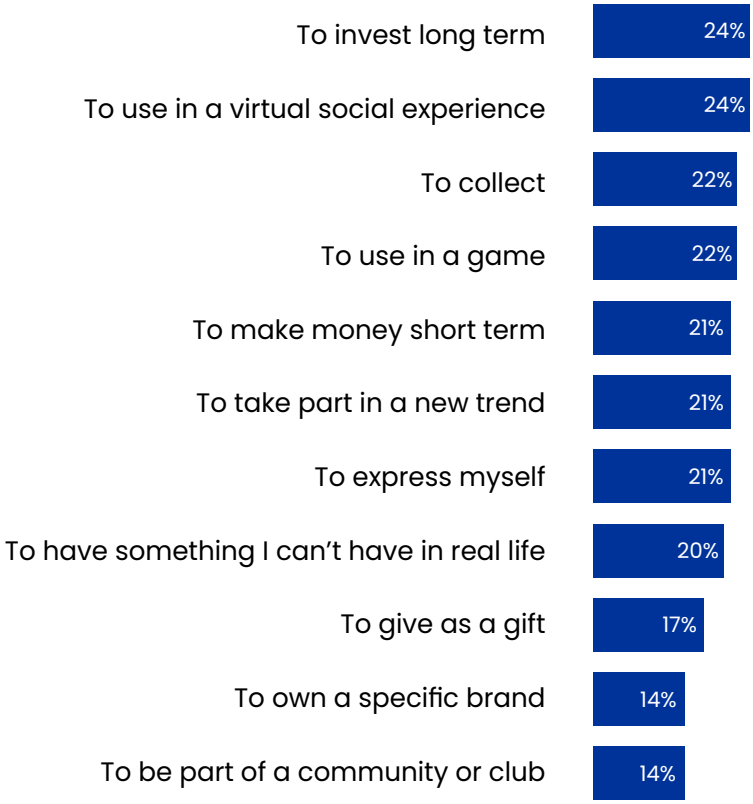
WHY ARE CONSUMERS INTERESTED IN VIRTUAL GOODS?

There's no single reason as to why consumers are purchasing virtual goods. They can be viewed as investments, taking part in a trend, used in a game, or simply a collector's item.



Base: Interested in NFT (n=6,755)

E08. Why are you interested in purchasing digital products/virtual goods? Please select up to 3 reasons. (MA, MAX 3)

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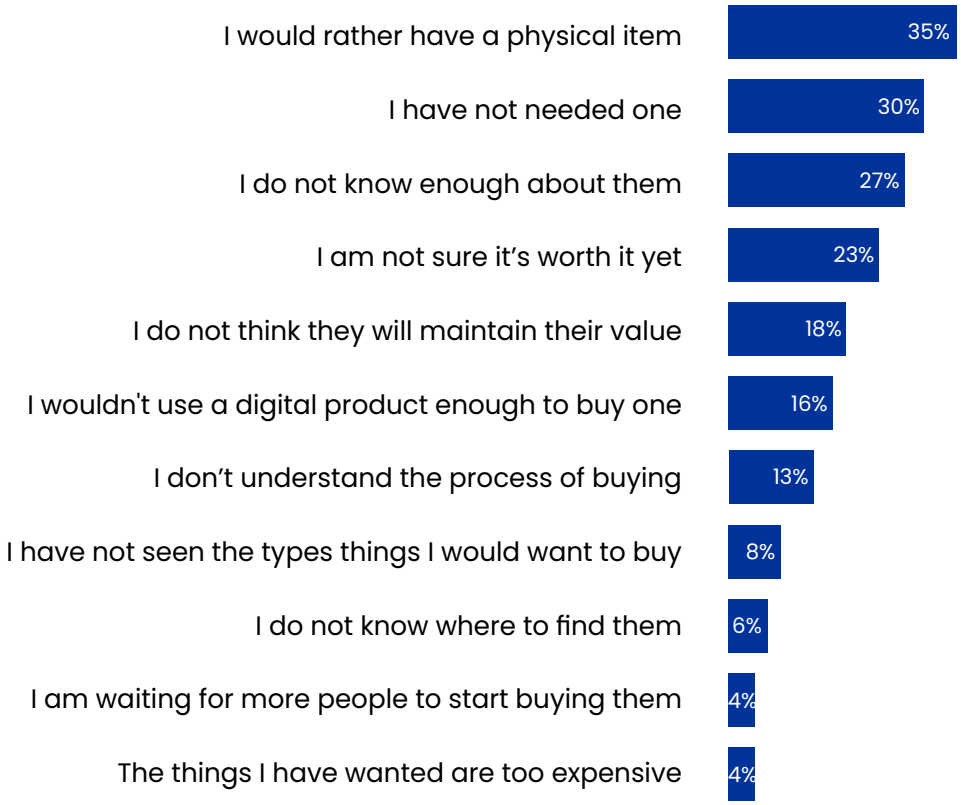
WHY AREN'T CONSUMERS INTERESTED IN VIRTUAL GOODS?

Those who are not interested are typically more interested in physical goods, or they still view the idea of virtual goods as foreign at this stage.



Base: Not interested in NFT (n=3,745)

E09. Why are you not interested in purchasing digital products/virtual goods? Please select up to 3 reasons. (MA, MAX 3)

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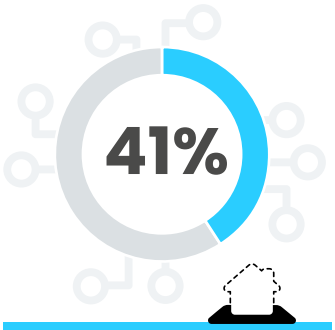
WHAT ABOUT VIRTUAL OWNERSHIP OF PHYSICAL ASSETS?

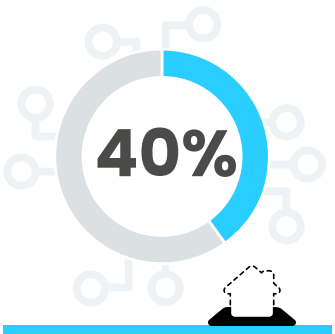
Currently, emerging markets in APAC and LATAM, as well as Millennials, are most receptive to this new form of ownership.

LAND DEEDS



Are confident in the security of NFTs

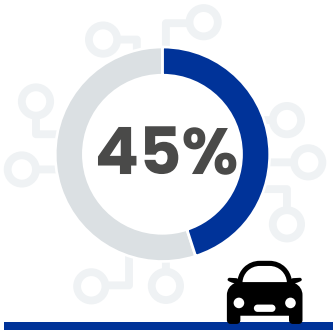
Significantly higher among
Emerging APAC 50%
LATAM 49%
Millennials 48%



Prefer NFTs

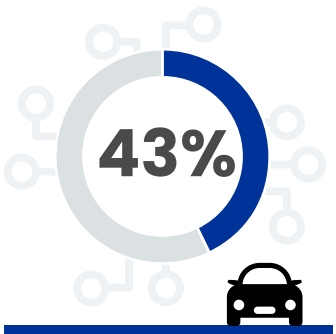
Significantly higher among
Emerging APAC 49%
Millennials 47%

VEHICLE OWNERSHIP CERTIFICATION



Are confident in the security of NFTs

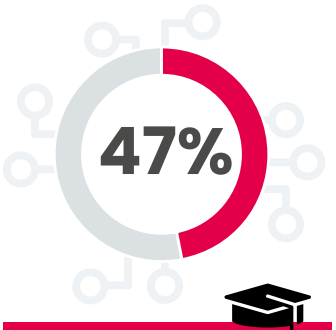
Significantly higher among
Emerging APAC 57%
LATAM 48%
Millennials 52%



Prefer NFTs

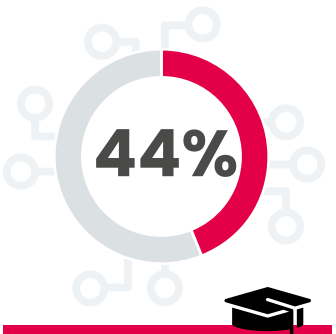
Significantly higher among
Emerging APAC 52%
Millennials 49%

ACADEMIC CERTIFICATION



Are confident in the security of NFTs

Significantly higher among
Emerging APAC 58%
LATAM 55%
Millennials 54%



Prefer NFTs

Significantly higher among
Emerging APAC 56%
Millennials 51%

E11. Below is a list of NFTs you can possibly own to represent ownership of physical assets in the real world, how much confidence do you have in the security of owning a digital copy of these asset ownership compared to a physical copy? (SA)
E12. Would you prefer to own an NFT of these asset ownership compared to a physical copy? (SA)

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DO PERCEPTIONS OF CRYPTOCURRENCY DRIVE ATTITUDES TOWARD THE METAVERSE AND NFTS?

CONSUMERS ARE MORE LIKELY TO SEE CRYPTO AS AN INVESTMENT THAN A MEANS OF PAYMENT

57%
Crypto Awareness

68%
Lean towards seeing crypto as an investment

32%
Lean towards seeing crypto as a means of payment

SIGNIFICANTLY HIGHER AMONG...

Emerging APAC:
62% aware
LATAM: 63% aware

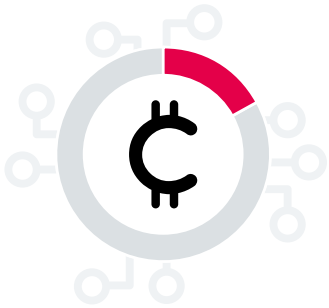
Emerging APAC: 72%
LATAM: 75%

Developed APAC: 39%
NA: 42%
EMEA: 36%
Gen X: 37%
Boomers: 36%

Base: Total (n=10,500), Aware of crypto (n= 5,926)

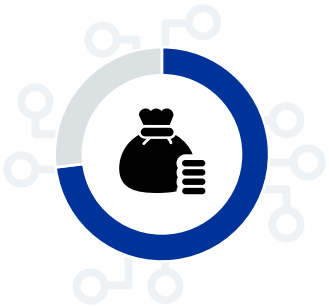
C19. Crypto are more of an investment than a means of payment - To what extent do you agree or disagree with the following statements? (SA)

THEREFORE, CRYPTO IS BOUGHT MOSTLY AS AN INVESTMENT RATHER THAN TO PAY FOR GOODS IN THE DIGITAL SPACE



17%

Crypto Ownership



73%

Bought crypto with investment as top motivator

21%

Bought crypto as a means of payment as top motivator

SIGNIFICANTLY HIGHER AMONG...

Emerging APAC: 25%
NA: 21%
LATAM: 21%

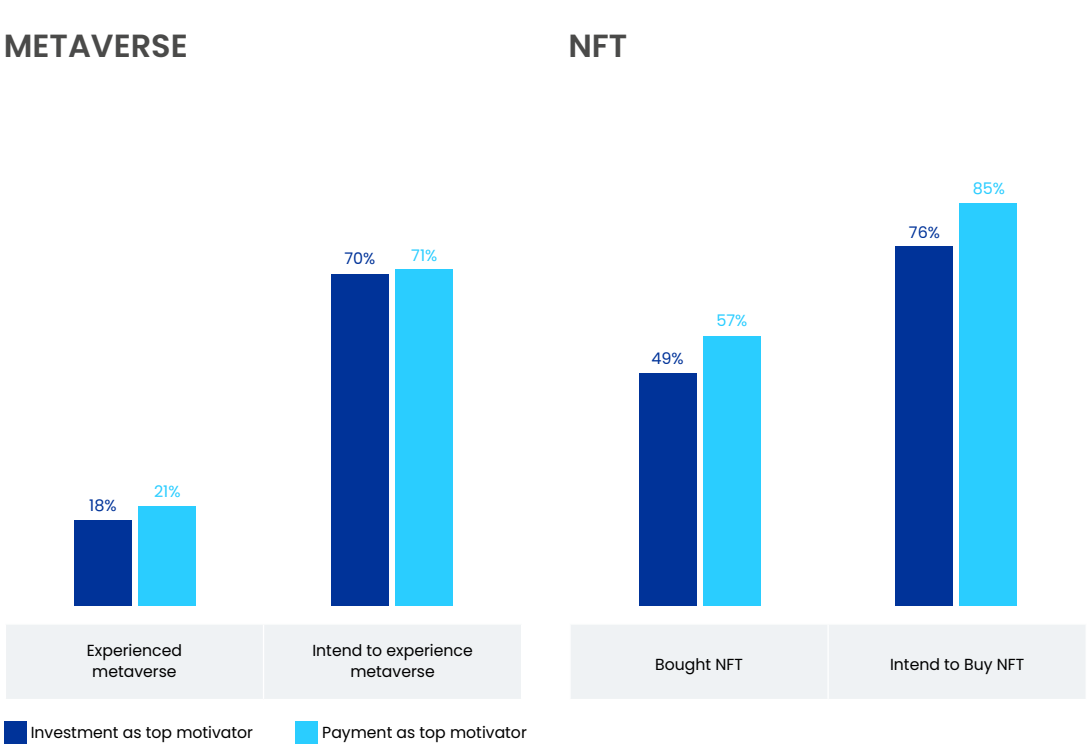
Emerging APAC: 78%

Gen X: 26%

Base: Total (n=10,500), Purchased/Want to purchase crypto (n= 4,367)

C15. What are the top 3 reasons you invested/want to invest in crypto? (MA, MAX 3)

THOSE WHO BUY CRYPTO AS MEANS FOR PAYMENT ARE MORE LIKELY TO HAVE BOUGHT/ INTEND TO BUY NFTS

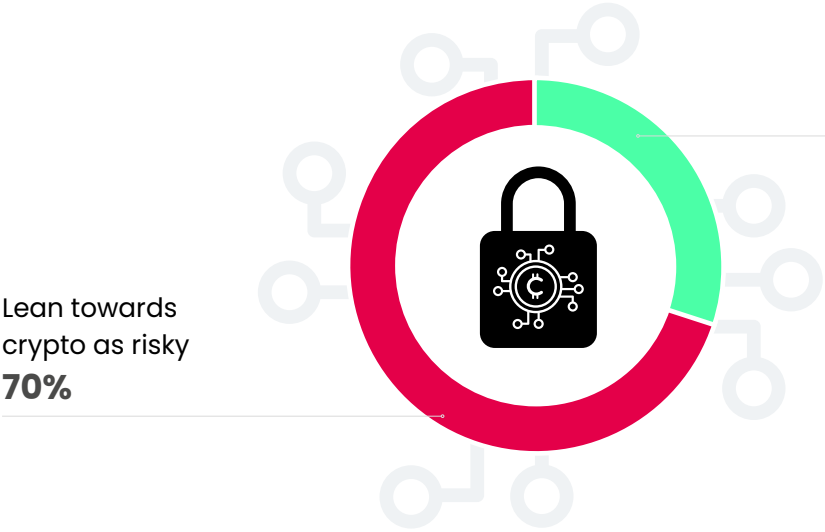


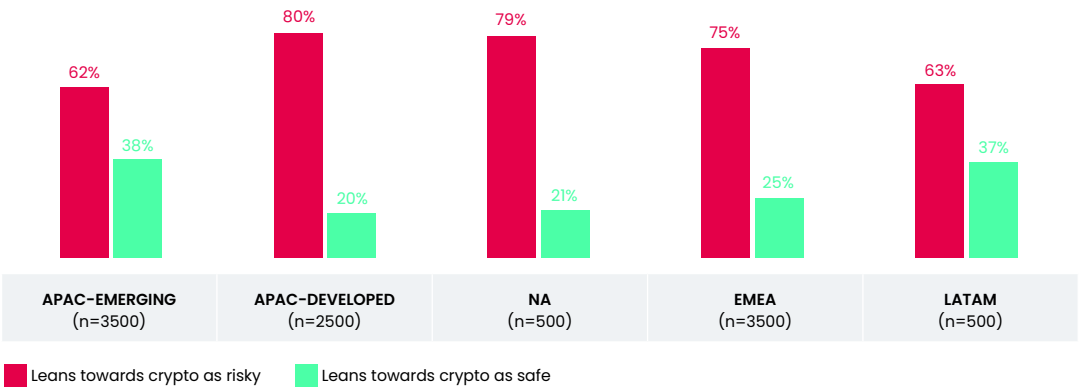
Base: Crypto as investment (n= 3,280), Crypto as payment (n=984)

D04.
E06. Which, if any, of the following digital products/virtual goods have you ever purchased? (MA)
E07. And which of these are you interested to purchase in the future? (MA)

OVERALL, MOST CONSUMERS VIEW CRYPTO AS RISKY

SECURITY LEVEL
AVERAGE 3.8/10





C06. How would you rate the risk level of the following financial products? (SA)

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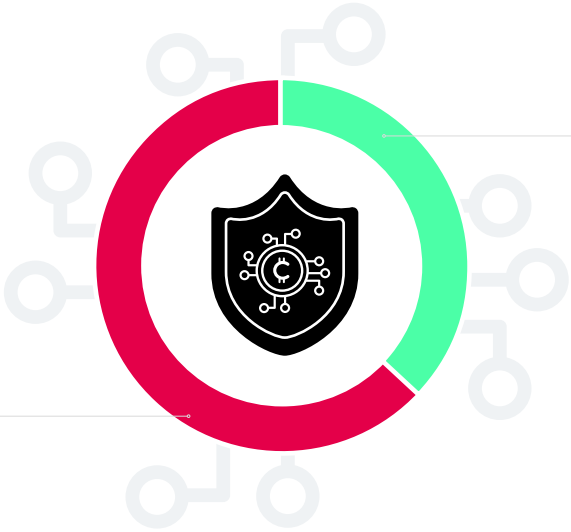
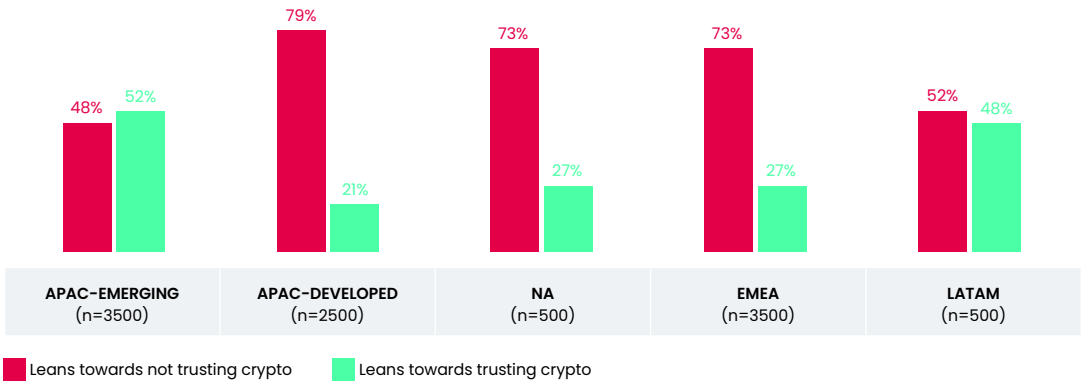
THIS IS WHY THEY'RE LESS TRUSTING OF CRYPTO, AS WELL

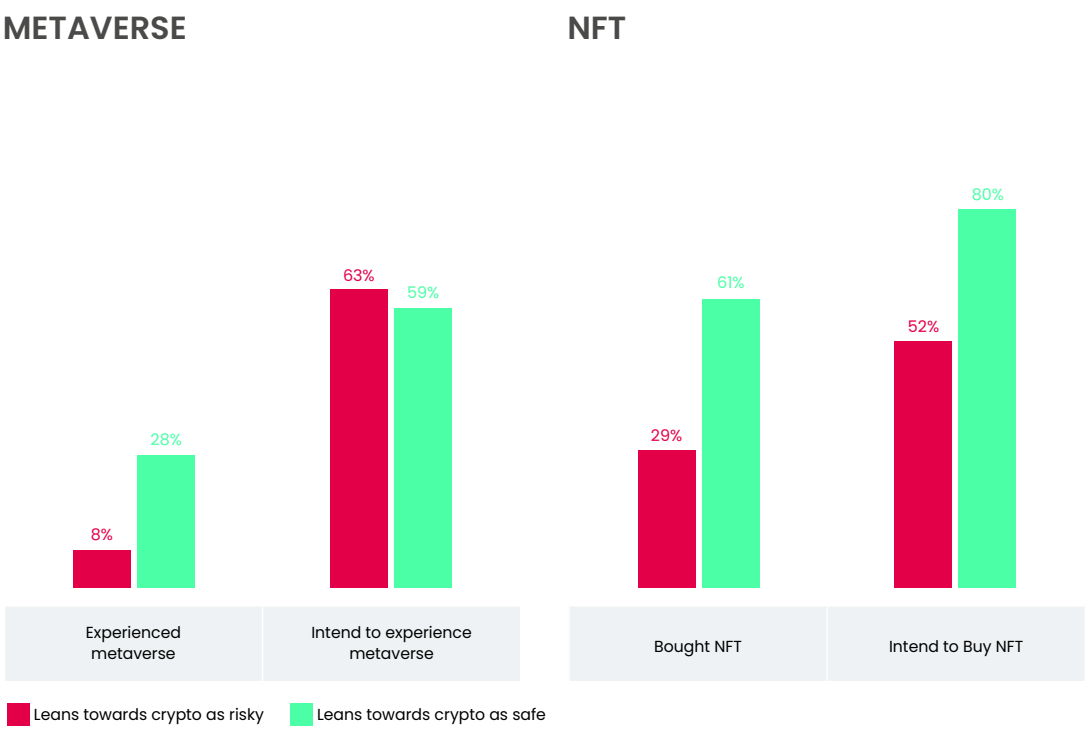
TRUST LEVEL
AVERAGE 4.4/10





C07. To what extent do you trust each of the following financial products? (SA)

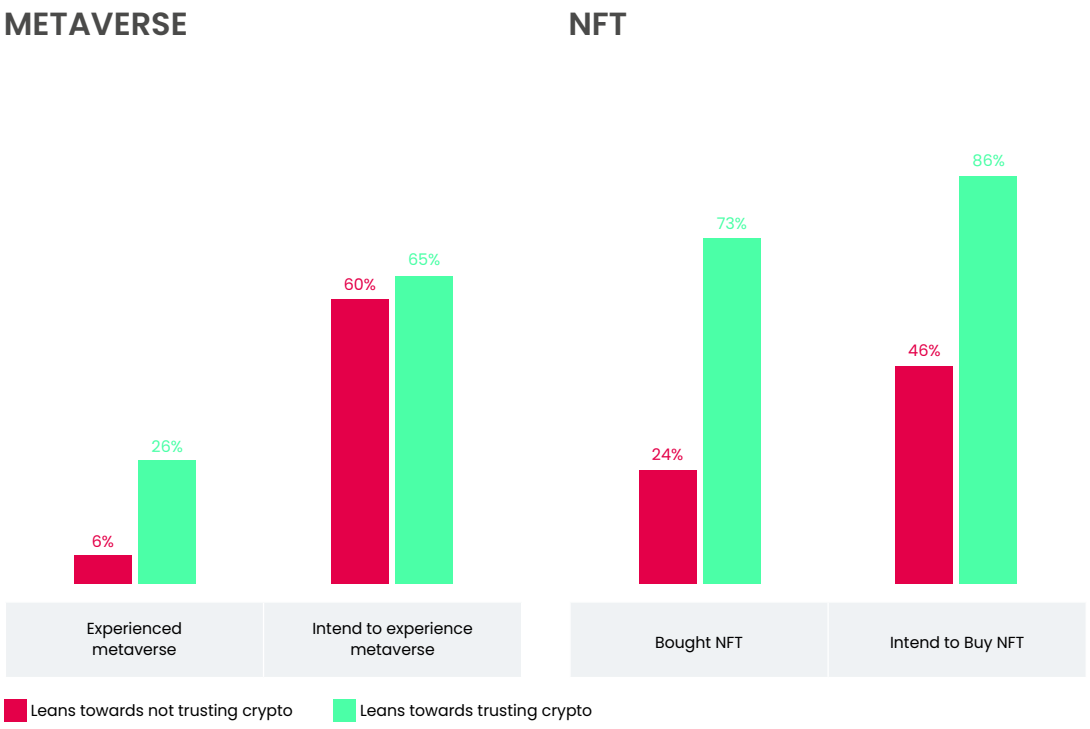
THE PERCEPTION OF RISK DOESN'T DAMPEN METAVERSE INTEREST, BUT IT DOES IMPACT THE APPETITE FOR NFTS



Base: Crypto as investment (n= 3,280), Crypto as payment (n=984)

D04.
E06. Which, if any, of the following digital products/virtual goods have you ever purchased? (MA)
E07. And which of these are you interested to purchase in the future? (MA)

LIKEWISE, THOSE WHO DISTRUST CRYPTO ARE MUCH LESS LIKELY TO HAVE BOUGHT OR WANT TO BUY NFTS IN THE FUTURE



Base: Crypto as investment (n= 3,280), Crypto as payment (n=984)

D04.
E06. Which, if any, of the following digital products/virtual goods have you ever purchased? (MA)
E07. And which of these are you interested to purchase in the future? (MA)

MOVING FORWARD...

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Consumers in the digital space are becoming more averse to tracking of their online activities, which gets monetized by targeting them with personalized and intrusive ads.

As innovations strive to give more power back to users and communities, brands will find it harder to connect with consumers—as it will be up to them to initiate communication and not the other way around. As such, brands should consider exploring new avenues to stay relevant and connect with consumers in the digital world.

Consumers are optimistic and open to new ideas in the digital space—such as Web 3.0, the Metaverse, and NFTs—even if they're still in their early stages. Many have already expressed their interest in these ongoing innovations.

By continuing to monitor trends and consumer sentiments in Web 3.0, the Metaverse, and NFTs, you'll be able to shape your brand strategy and futureproof your business in the new age of the internet.

INTERESTED TO FIND OUT MORE?

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LEARN MORE

Contact us so we can walk you and/or your team through the report and discuss how we can customize a study based on your needs and requirements. Following the discussion, we will submit a detailed proposal with quotations for your consideration.

CHRISTINE TAN
SENIOR DIRECTOR

Christine.tan@toluna.com

+65 9126 3874

PROPOSAL & QUOTATION SUBMISSION

Following the discussion, we will submit a detailed proposal with quotations.

THANK YOU

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