



# New realities

## Into the Metaverse and beyond

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THOMPSON

A REPORT BY WUNDERMAN THOMPSON INTELLIGENCE

# Foreword

## The world is hurrying to prepare for the metaverse as it rapidly evolves from a sci-fi concept into a reality.

Following the release of our “Into the Metaverse” report in September 2021, news outlets and brands have not only joined the conversation but are also actively participating in being part of the metaverse. Collections of non-fungible tokens (NFTs) have been populating the market-place, branded virtual worlds have taken over games, and investment in technologies such as mixed, augmented and virtual realities has ramped up significantly.

Every industry disrupted by the digital era is expected to feel the impact of the metaverse (see page 5) and this may explain why companies from banks to ad agencies are eager to form the right partnerships and even create in-house metaverse teams to get ahead. And it’s not only companies wanting in on the metaverse, but governments and influential figures too.

There’s a lot to be excited for:

- 74% of people who know what the metaverse is believe it’s the future
- 66% believe it is going to be life-changing

“New realities: Into the metaverse and beyond” is a micro report that accompanies the original “Into the Metaverse” publication. Eight industries are highlighted, each featuring case studies that offer a different lens on how the brand is participating in the metaverse and a “why it’s interesting” analysis. Sections focusing on NFT innovation (page 60) and society and government (page 66) highlight how far-reaching the metaverse has become.

The metaverse is already here and it is changing the way our realities are being shaped. It’s time to arm yourself with knowledge and grow a brand that is metaverse-ready.



Emma Chiu

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## About the data in this report

Unless otherwise stated, all findings in this report were collected by Wunderman Thompson Data as part of an original survey on technology, digital spaces and the metaverse.



# Introduction

We are entering a defining moment for the metaverse. What the metaverse is, what it should be and what it can become is being defined by companies, individuals and even governments.



The impact of the metaverse is predicted to be significant across industries. From finance to food and retail to health, the vast majority of consumers expect the metaverse to drive mass disruption.

### What industries/sectors will be impacted by the metaverse?





# 74% of people had heard of the metaverse as of March 2022.

“Metaverse” has officially entered the cultural lexicon. Awareness of the term has picked up significantly. The 32% of global consumers who had heard of the term in July 2021 jumped to 74% in March 2022. *Collins Dictionary* listed metaverse as one of its top 10 words of 2021, and Dictionary.com added metaverse to its official catalog in March 2022.

Following the cultural current, the metaverse is shaping up as a powerful financial force, drawing funding, brand investment and shoppers’ dollars. Epic Games secured an additional \$2 billion in funding from Sony and Lego parent company Kirkbi in April 2022 to advance its metaverse vision. Meta invested \$10 billion in 2021, and the company says it plans to increase its investments “for the next several years.” Roblox reported \$1.9 billion in revenue in 2021, representing 108% year on year growth.

Leading financial institutions predict that this economic power is only going to grow. JPMorgan refers to the metaverse as a \$1 trillion yearly market opportunity and forecasts that in-game ad spending will reach over \$18 billion by 2027. Goldman Sachs sees the metaverse as an \$8 trillion opportunity, and Morgan Stanley says the metaverse has the potential to generate \$8.3 trillion total consumer expenditure in the United States alone, identifying it as a \$50 billion revenue opportunity for luxury specifically.



## Defining the metaverse

What is the metaverse? At its most basic level, the metaverse is an extension of our lives enhanced by technology. Currently, it exists as a series of distinct virtual worlds and experiences. In the future, however, the metaverse will expand into an interconnected and limitless world where our digital and physical lives fully converge.

This report is a companion guide to our “Into the Metaverse” report, released in September 2021. For more detail on what the metaverse is, how it will take shape, and experts’ predictions, refer to the original report.

# Terms to know

## Interoperability

The capacity for virtual experiences, possessions and identities to travel unchanged across platforms.

## Persistence

A continuity of existence; the continuation of virtual life regardless of whether people are online or offline.

## Decentralization

Distribution of ownership—the idea that the metaverse will not be regulated or run by a single corporation or individual.

## NFT

Non-fungible tokens (NFTs) are digital certificates of authenticity that will form the basis of digital ownership.

## Digital twins

Physical spaces that have been cloned in the virtual world to promote familiarity and efficiency.

## Liminal spaces

A new generation of gathering spaces and event locales that incorporate both physical and virtual elements.

## Extended reality

An umbrella term encompassing augmented, virtual and mixed realities.

## Web3

A decentralized, blockchain-based internet that will enable a seamless fusion of virtual and physical life.

## DAO

Decentralized autonomous organizations (DAOs) are community-led digital organizations that run on blockchain technology.

## Virtual teleportation

A new technologically enabled form of travel or collaboration that uses multisensory and photorealistic renderings to make you feel as though you're in the same room as someone who could be halfway around the (physical) world.



# By the numbers

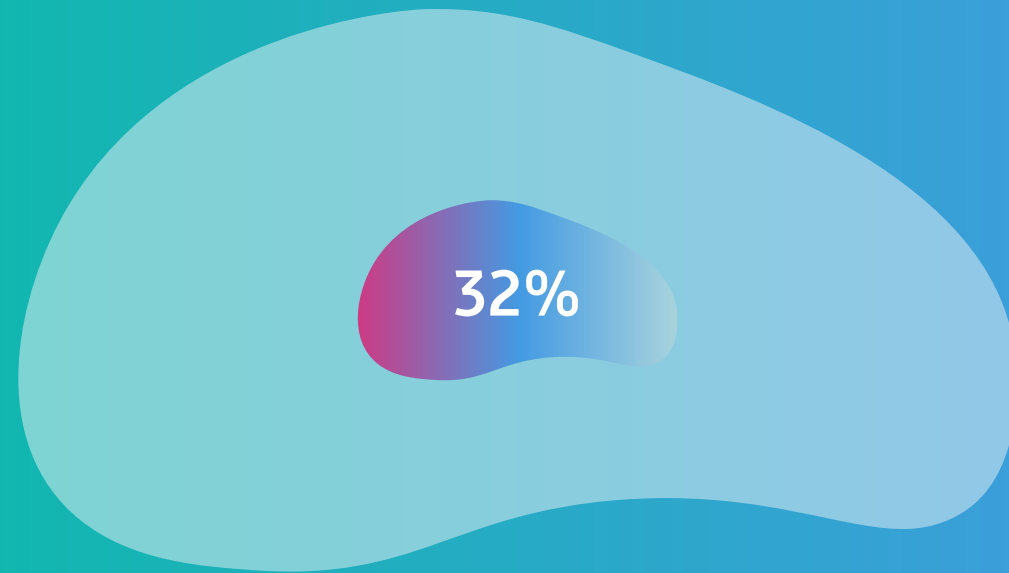
Original consumer data collected by Wunderman Thompson Data among 3,005 people aged 16-65 in the United States, United Kingdom and China. The research fielded in March 2022.

## About the data in this report

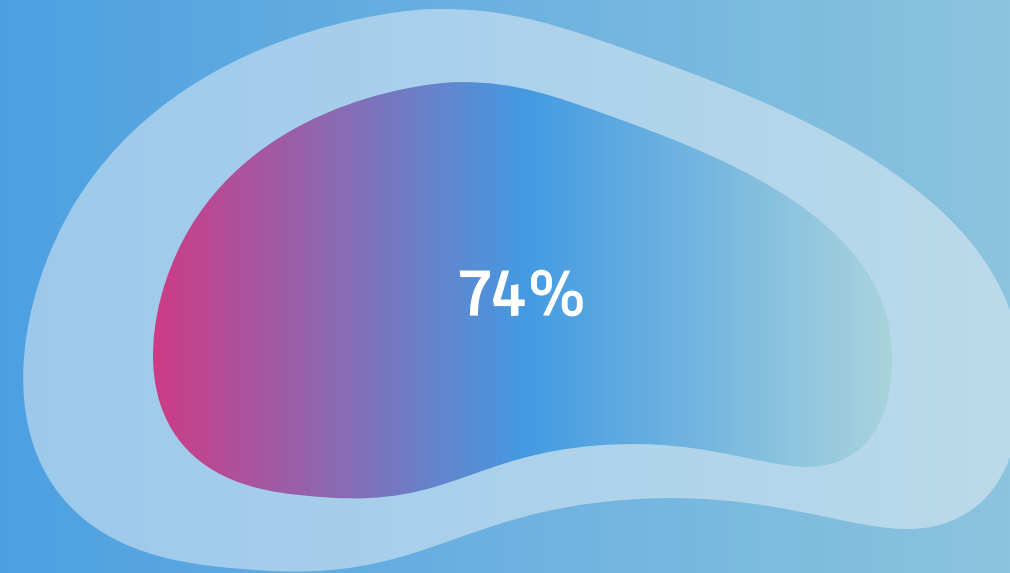
Unless otherwise stated, all findings in this report were collected by Wunderman Thompson Data



# Awareness is on the rise...



People who had heard of the metaverse as of July 2021



People who had heard of the metaverse as of March 2022

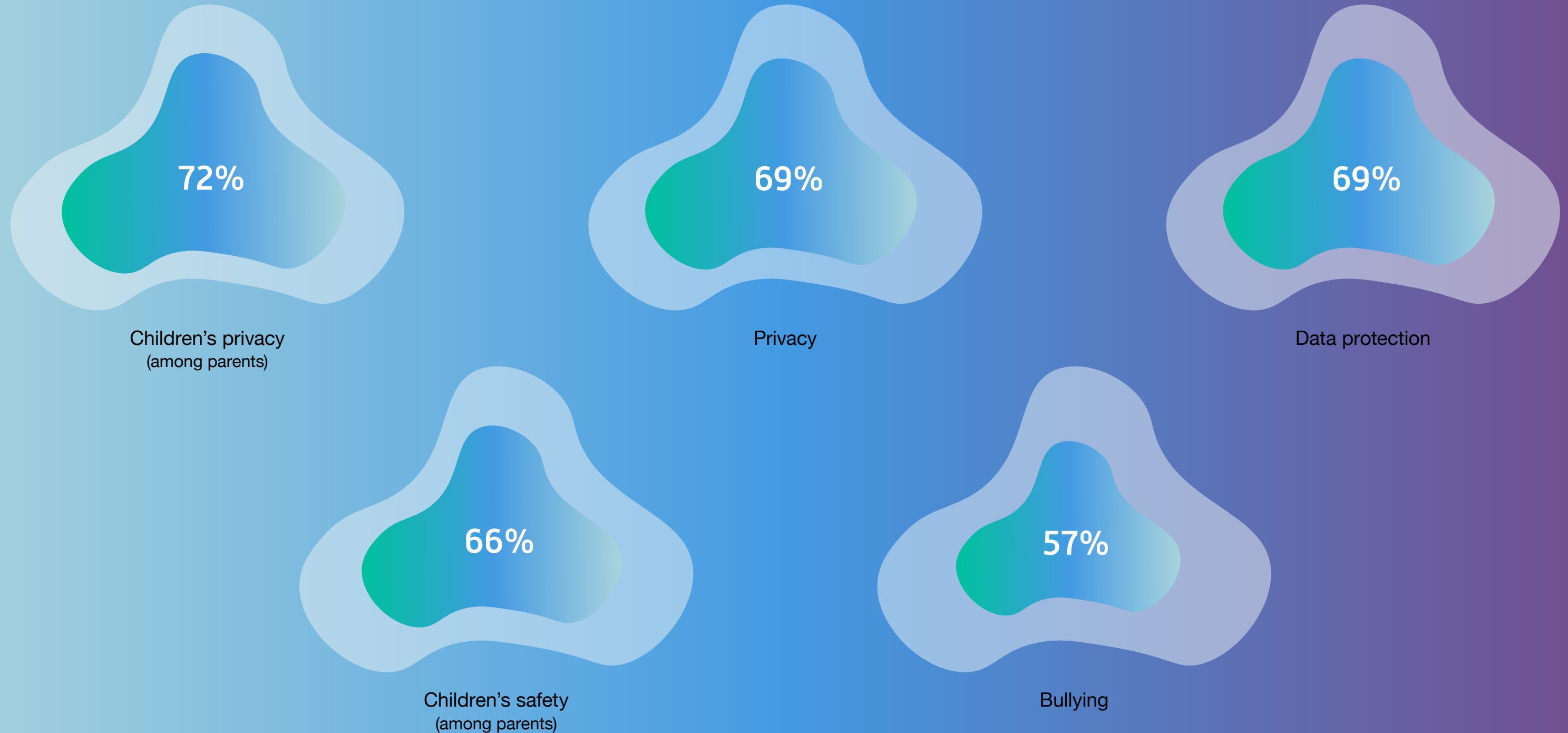
# ...but there is still a lack of clarity



People who know what the metaverse is and can explain it to someone else

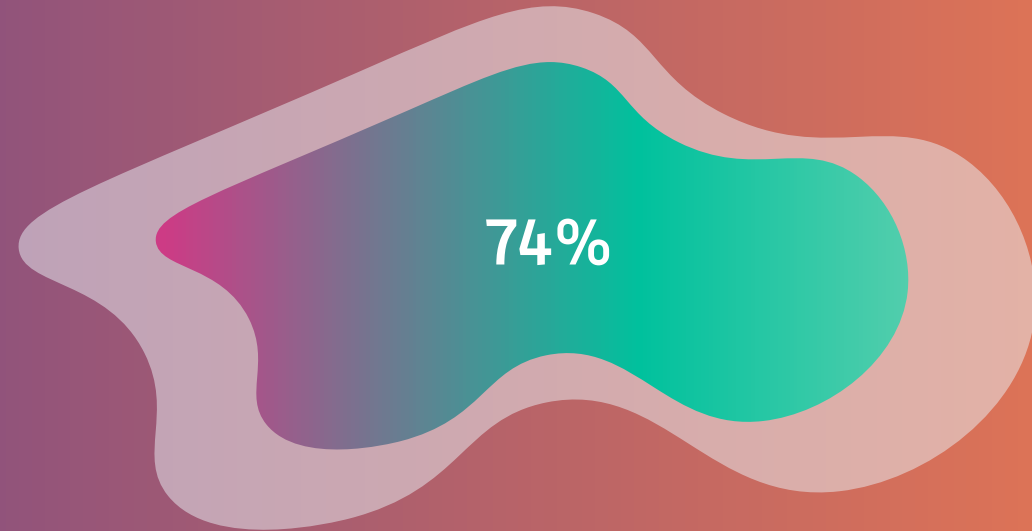
# Top concerns about the metaverse include...

Those who know what the metaverse is say they are worried by...

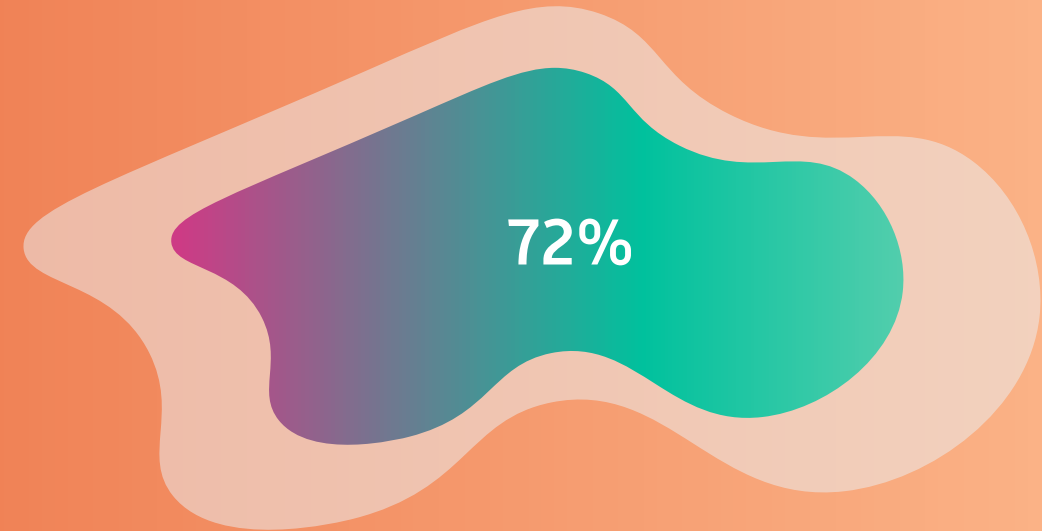


# Even so, people believe that the metaverse is promising...

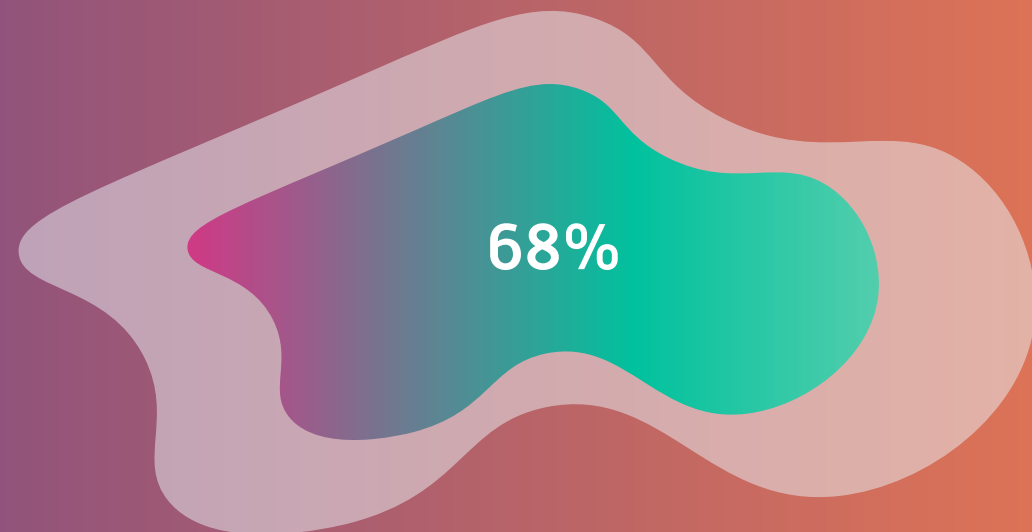
Those who know what the metaverse is say it will be...



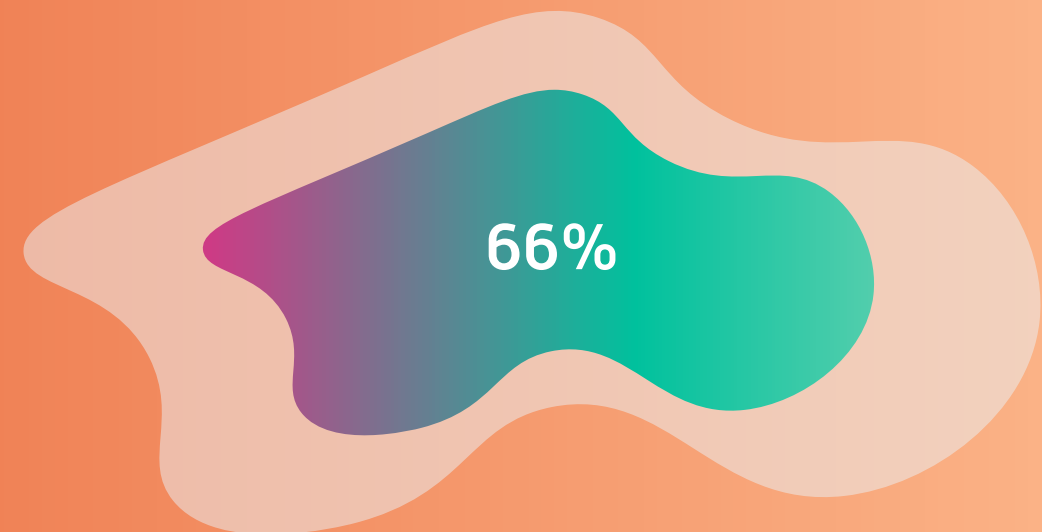
The future



The next big thing



The next internet

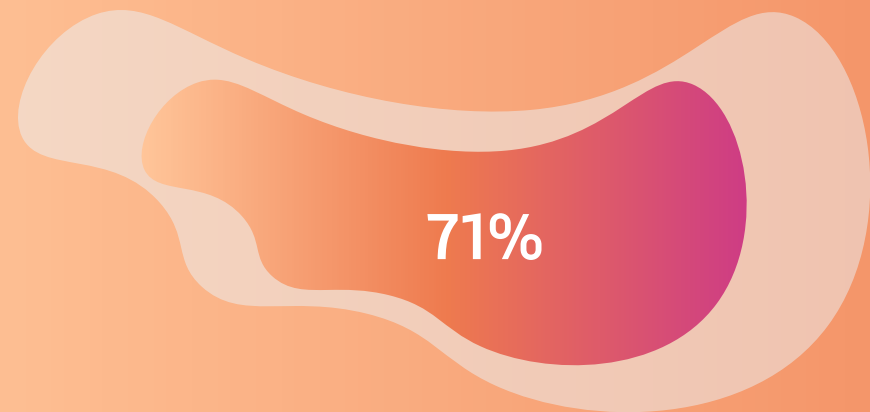


Life-changing

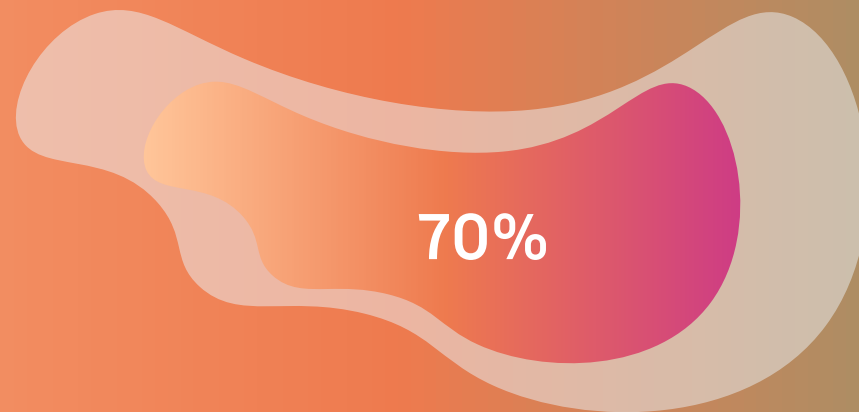


# ...and think it can bring people together and foster inclusivity...

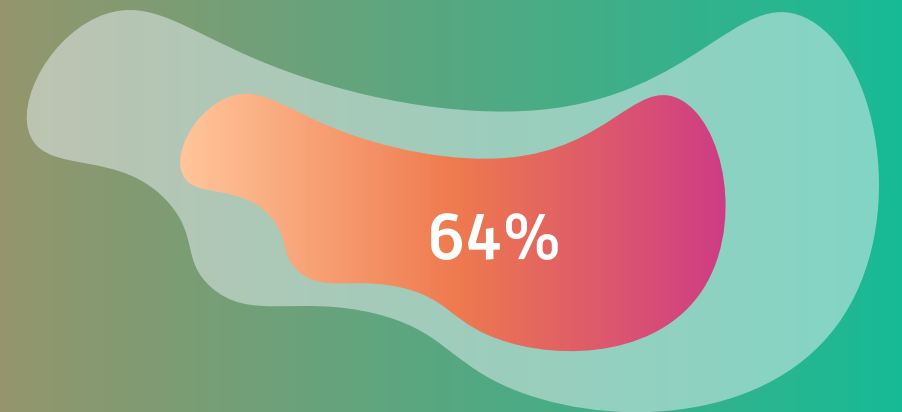
Those who know what the metaverse is believe...



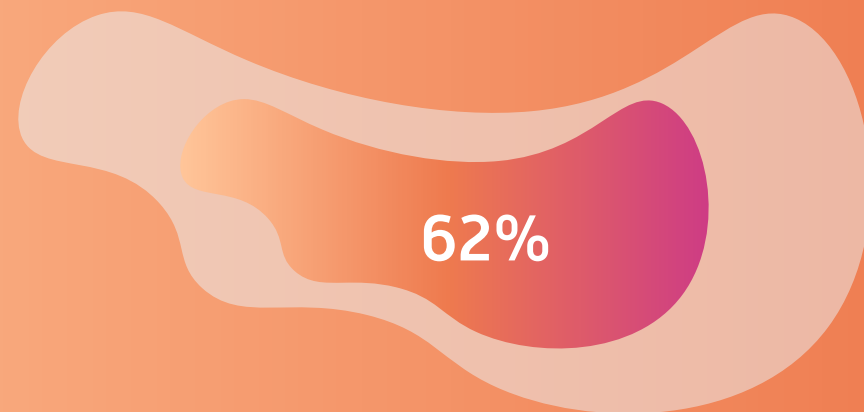
Brands need to work just as hard to create inclusive spaces in the metaverse as they do offline



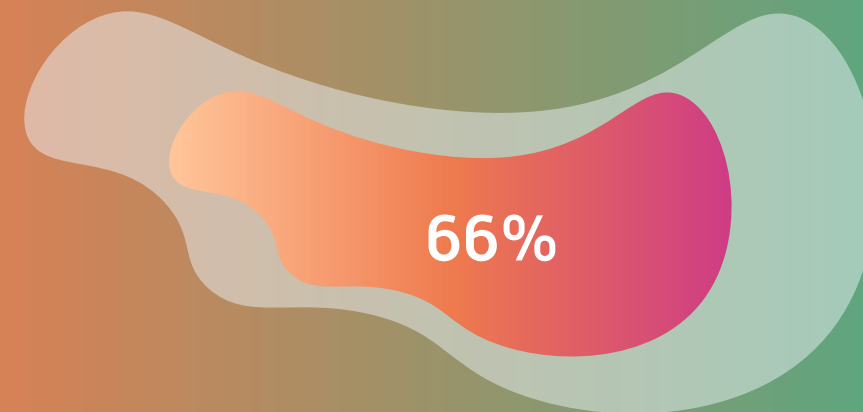
The metaverse will be inclusive



The metaverse can bring people together



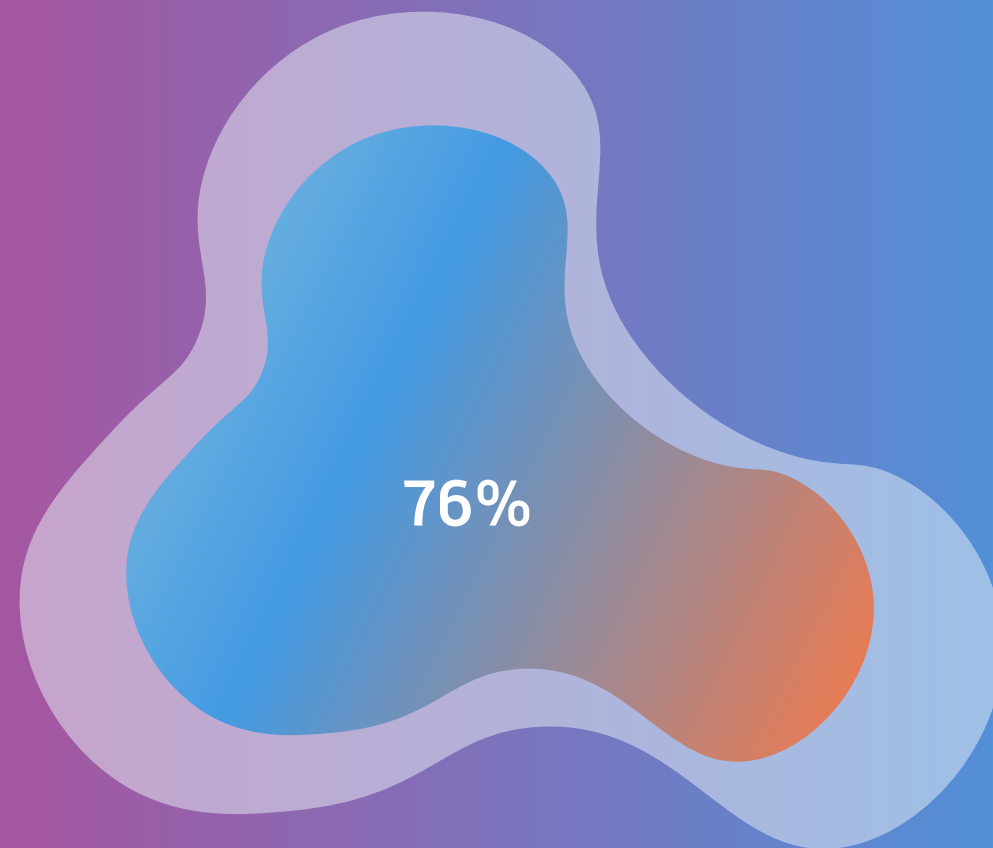
The metaverse has the ability to be more inclusive than the physical world



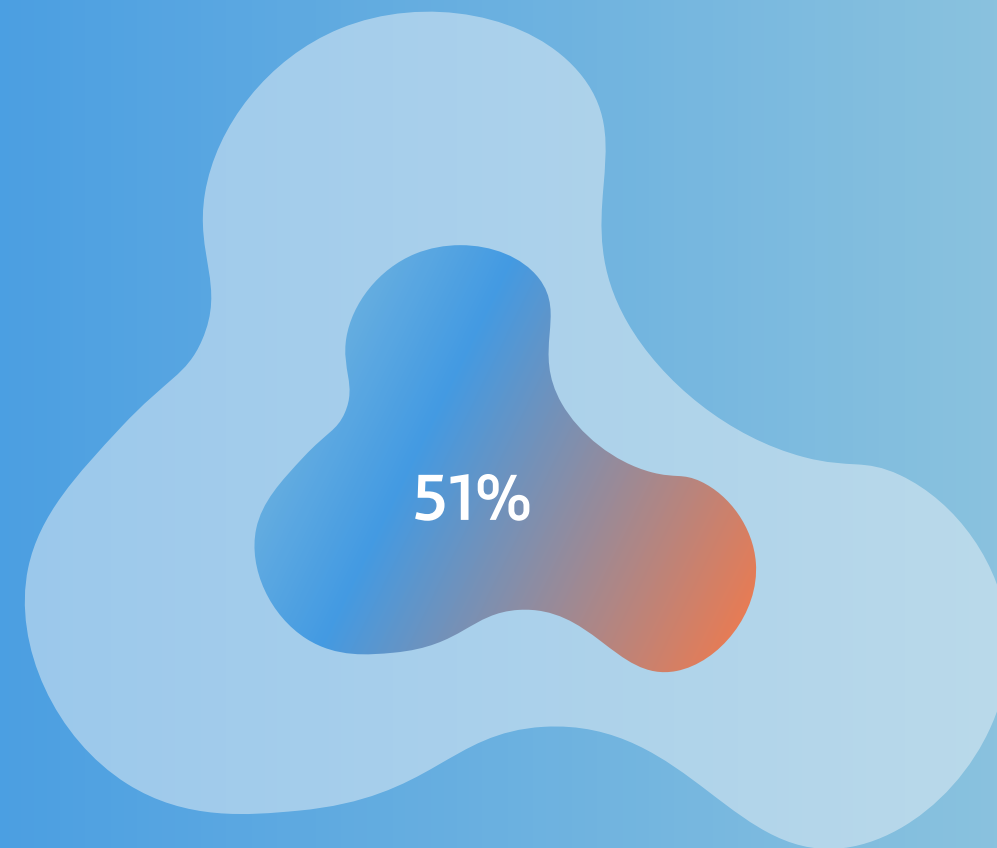
We need to make sure that everyone everywhere in the world can benefit from the metaverse

# ...and that it allows for authentic and individual self-expression

Those who know what the metaverse is say...



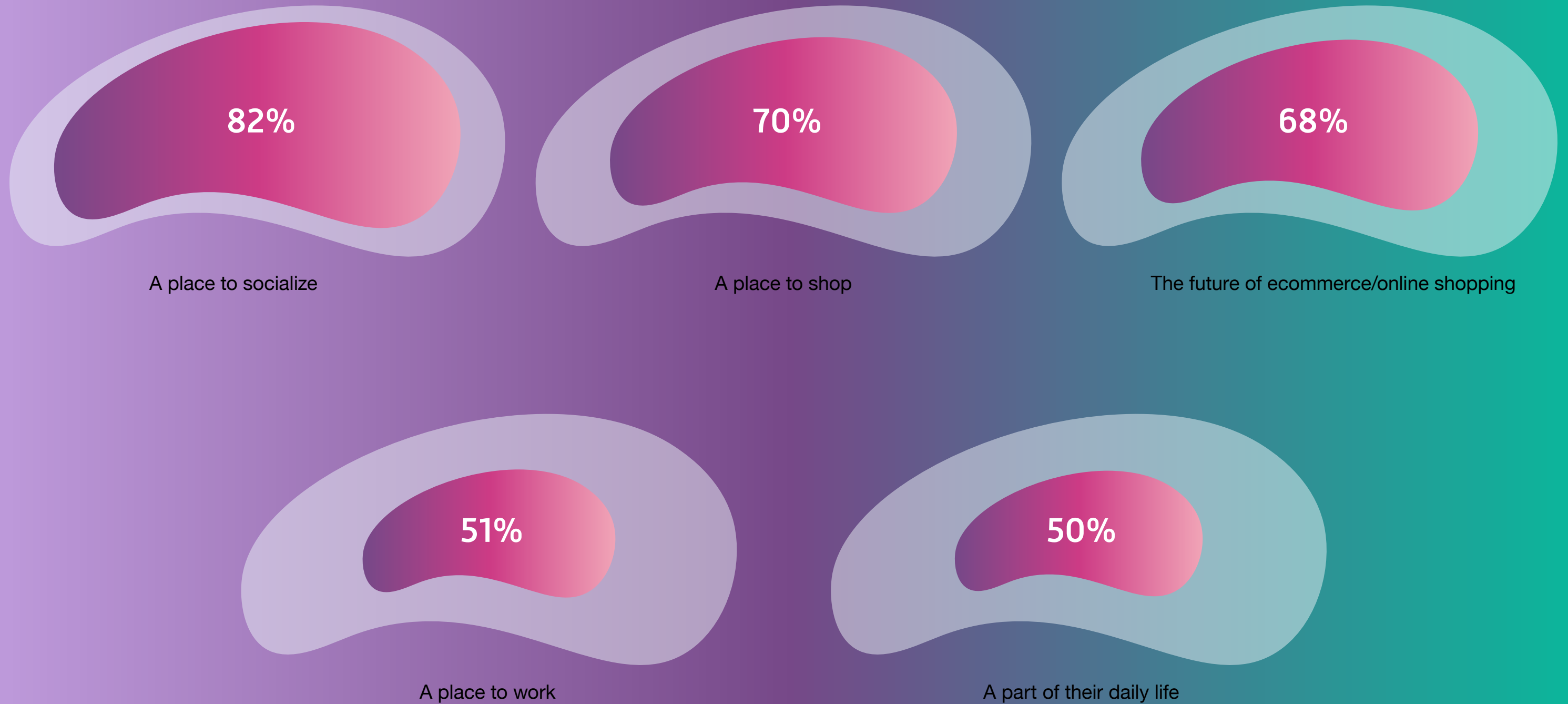
They want their avatar to express their creativity and individuality in ways they can't in the physical world



They feel it would be easier to be their true, authentic self in the metaverse

# People expect the metaverse to be part of their daily habits...

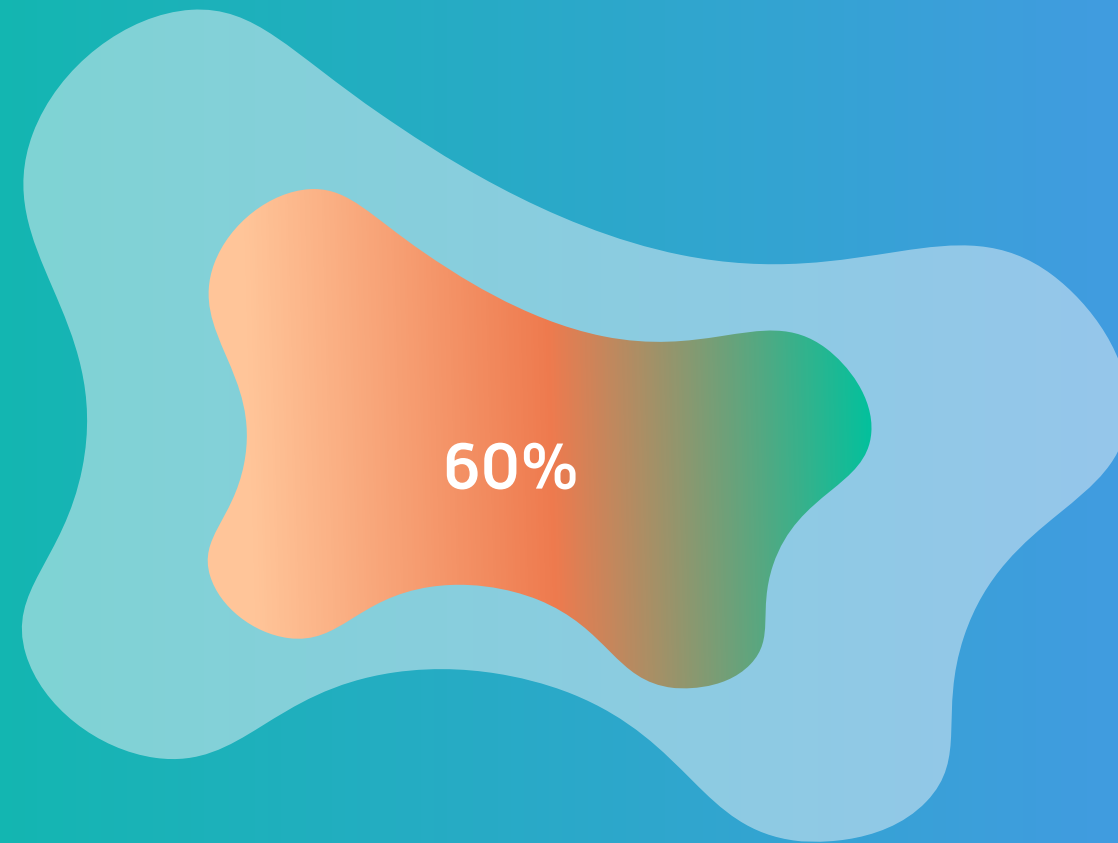
Those who know what the metaverse is say it will be...



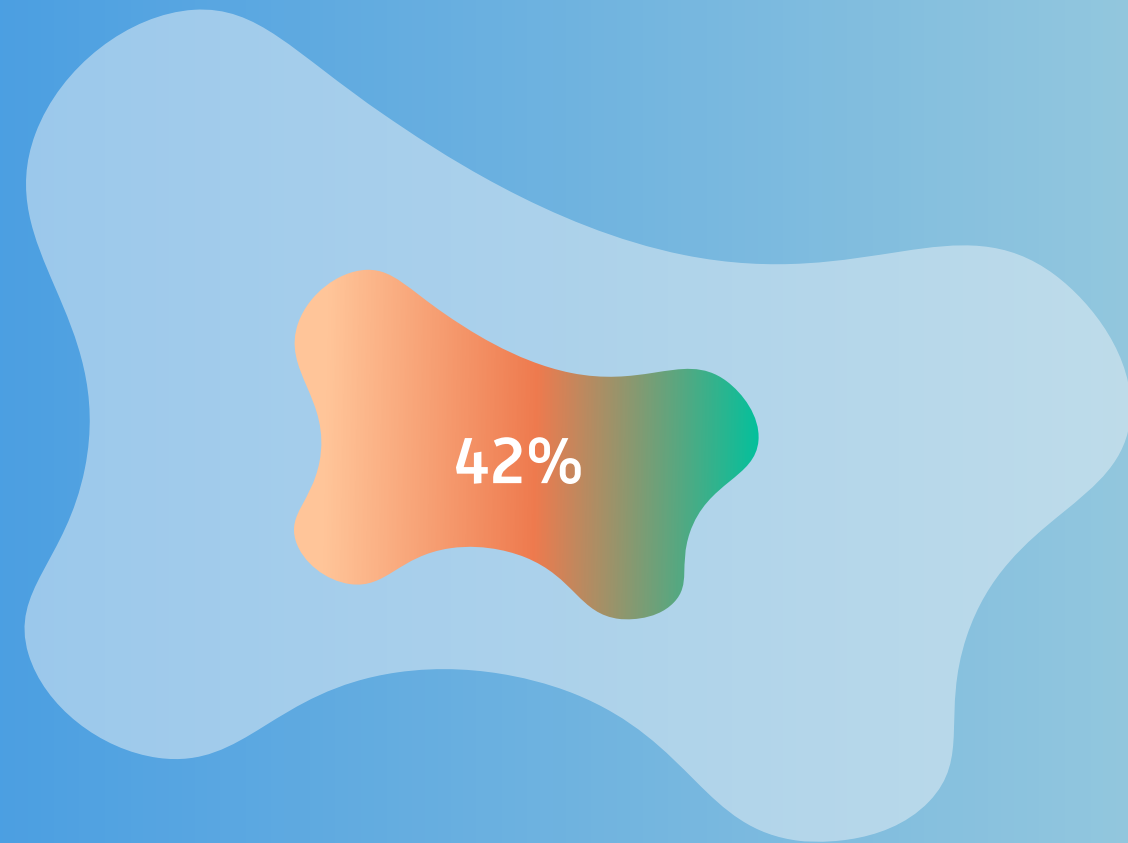


# ...and see potential in digital consumption

Those who know what the metaverse is...

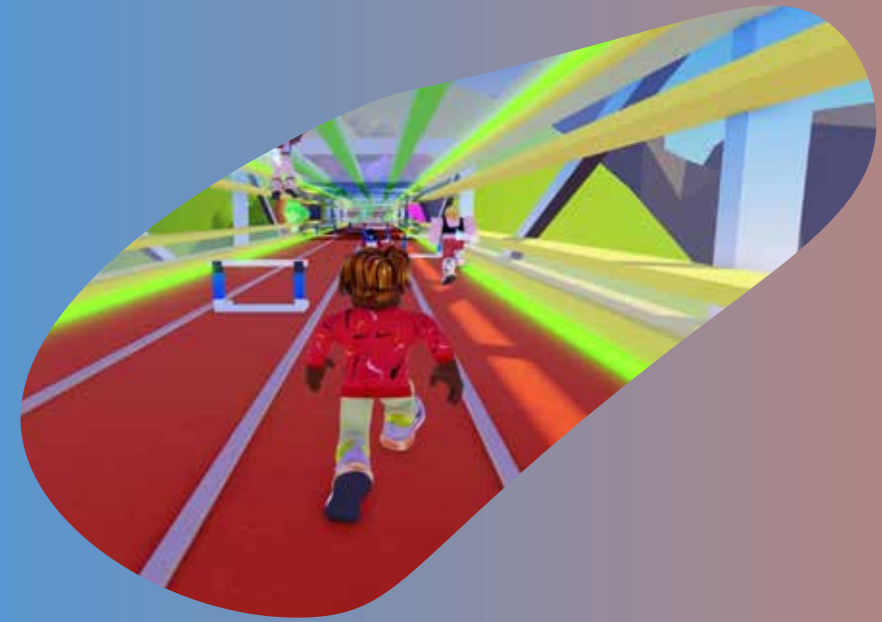


Say brands should be manufacturing and selling digital products alongside physical products



Own or have owned digital possessions

# Retail







**86% of people believe that the retail industry will be impacted by the metaverse. Among those who are familiar with the metaverse, 70% believe it will be a place to shop and 68% say it will be the future of ecommerce and online shopping.**

Big-name brands in retail are setting up shop in the metaverse, finding new ways to interact with their wide-span consumer base. Not only are companies selling virtual clothing and gear, they're also registering official storefronts for fully digital shopping experiences, even creating completely branded digital worlds where customers can connect, play and interact. The wide scope of digital engagement, reaching far beyond dressing an avatar or hosting a section of a game, indicates that brands are investing themselves fully into digital realms for seamless immersion between digital and physical spaces. Read on for more about the new ways retail giants are forming digital communities, and connecting with their consumers in the metaverse and in liminal storefronts.





## Skechers

The global activewear brand was the first to sign a lease in Decentraland's Fashion District, intending to open an experimental virtual storefront. Skechers also filed trademark applications to sell virtual goods throughout Decentraland, including footwear and apparel.

### Why it's interesting

A high-profile lifestyle brand is stepping into the metaverse, preparing not only to sell virtual goods and clothing, but also to open an official storefront in the virtual realm. Skechers president Michael Greenberg calls the agreement with Decentraland "an investment in our future" and says the brand looks forward "to embarking on this virtual era, and exploring creative ways for our brand to engage with new customers and audiences as we launch the new Skechers experience."

## Nike

Nike's launch of Nikeland in *Roblox* and its *Roblox* in-store experience blend virtual and physical consumer engagement strategies for an extensive and immersive Nike experience on all fronts. Consumers can shop and interact with Nike-branded augmented reality (AR) games and features in Nike's NYC flagship store for a uniquely liminal shopping experience. Virtually, customers can connect, create and compete in Nikeland, a bespoke world housed in *Roblox*. Using a Nikeland toolkit, players can create and design their own mini games in the digital realm using interactive sports materials.

### Why it's interesting

By overlapping the virtual and physical worlds, Nike is engaging consumers from multiple points of contact, encouraging play, competition and creativity





while also selling and promoting physical and virtual gear from branded platforms. By eliminating access as a barrier to playing and connecting, Nike is meeting customers wherever they are, innovating both the physical and virtual worlds for future sports experiences.

## Sotheby's

The luxury auction house has taken its independent virtual platform a step further, collaborating with Liverpool Football Club to create the LFC Heroes Club NFT community. Fans can now purchase NFT collectibles to be a part of the digital fan community and gain future access to online forums, virtual hangouts, unique experiences, competitions, guest appearances and retail discounts.

## Why it's interesting

Superfans of the football club now have a universal, official digital community to engage with and invest in year round. Auctioned, unique NFTs are the key to the exclusive experiences held by the virtual club for next-level engagement and support of the LFC Foundation. Hosted by Sotheby's Metaverse, the club is stepping into a luxurious metarealm while also maintaining its environmentally friendly pledges by using energy-efficient blockchain technology from Polygon.

## Forever 21

In December 2021, Forever 21 announced its entry into the metaverse. The retailer has partnered with Virtual Brand Group, a metaverse creation company, to build Forever 21 Shop City, described as a "fashion retail experience," in *Roblox*. The activation lets users design, build, curate and manage their own personal stores in *Roblox*, where they can buy and sell Forever 21 clothing and accessories, and hire employees. "This is a social experience, not just a sales experience, and becomes an infinite loop: Forever 21 stores and ecommerce and *Roblox* stores and experiences," says Katrina Glusac, chief merchandising officer at Forever 21. The retailer also plans to use the platform to introduce new products and launch collaborations.

## Why it's interesting

Retail in the metaverse is moving beyond simply selling virtual products for avatars. It is becoming a launchpad for new product releases and collaborations, and, crucially, giving users unprecedented control over their own personal retail experience. Customization will be king in the metaverse; why shouldn't this also inform how people shop? Neha Singh, founder and CEO of virtual store platform Obsess, tells Wunderman Thompson Intelligence that virtual retail experiences "are going to become a lot more dynamic. And what

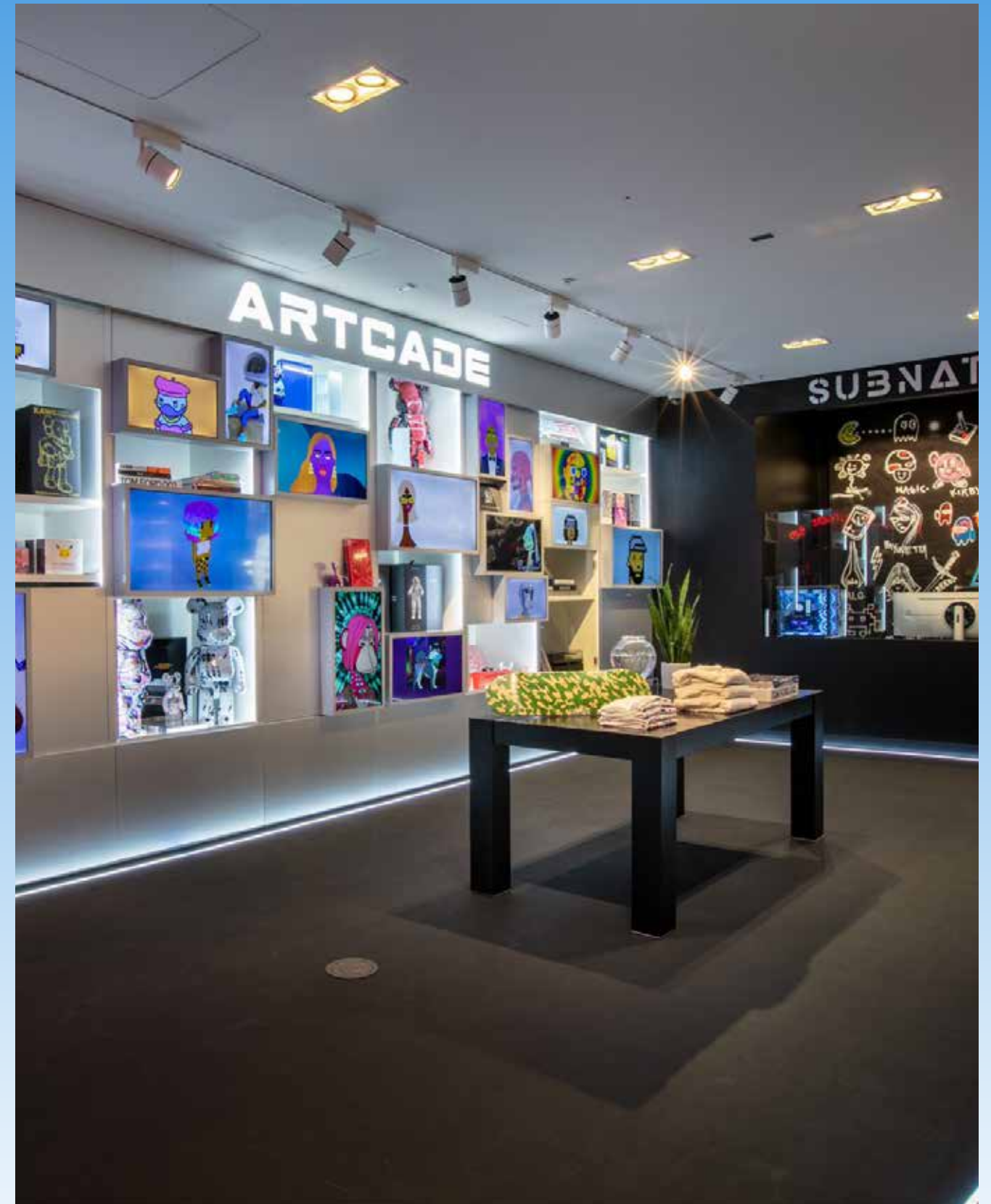
that means is that, ultimately, you and I could go to the same virtual store, and we might see different products. Also, maybe eventually the environment will be customized to the user.”

## Fred Segal

Fred Segal’s Artcade is a new physical concept store where shoppers can purchase virtual goods alongside physical products. The retailer’s first liminal shopping experience, it was unveiled in December 2021 and created in collaboration with Subnation. The Sunset Boulevard flagship now has “a new Web3 shopping format that fuses the physical and digital worlds,” says Subnation’s cofounder and chief managing director Doug Scott. Digital skins, crypto art and NFTs accompany the store’s physical items and can be purchased using cryptocurrency. Artcade also showcases monthly programs including NFT exhibitions, AR trunk shows, esports and live performances. Fred Segal CEO and owner Jeff Lotman references a “massive transformation in the retail industry,” which inspired the brand “to completely reimagine how consumers will shop.”

### Why it’s interesting

Retailers are adding a digital layer to physical shopping, reimagining the shopper experience. “We see a big opportunity in taking the reality around you and layering the digital world on top of it,” Carolina Arguelles Navas, group product marketing manager at Snap AR, tells Wunderman Thompson Intelligence. “From shopping experiences to travel, there’s an endless opportunity to take the power of digital content and layer this onto the physical world around you.”









# Finance



## 82% of global consumers think that the finance industry will be impacted by the metaverse.

Leading financial institutions are also predicting that the metaverse will become a significant economic force. Goldman Sachs and Morgan Stanley have each called the metaverse an \$8 trillion market opportunity. In its February 2022 “Opportunities in the metaverse” report, JPMorgan labeled the metaverse a \$1 trillion annual opportunity, citing factors such as the growing virtual real estate market—which could eventually include the management of credit, mortgages and rental agreements for virtual properties—work in the metaverse (see page 38), advertising in the metaverse, and the virtual goods economy, which it estimated as generating \$54 billion in yearly revenue. Analysis from Citi in April 2022 predicts that the metaverse economy could grow to \$13 trillion by 2030.

Leading financial and political players are taking steps to embrace digital economies. The New York Stock Exchange is preparing for NFT and cryptocurrency trading with a trademark application, filed in February 2022, for a virtual trading marketplace. Eric Adams, mayor of New York City, announced when he was elected in November 2021 that he would take his first three paychecks in Bitcoin, following Miami mayor Francis Suarez’s pledge earlier that month to receive his next paycheck in Bitcoin.

Several countries are experimenting with nationally regulated digital currencies. In March 2022, in the United States, President Biden signed an executive order to explore a digital dollar. In the same month, the Bank of England announced a year-long research project in collaboration with MIT Media Lab’s Digital



Currency Initiative on central bank digital currencies. And in February 2022, India announced plans to launch a digital rupee in 2022-2023.

China is currently piloting a digital yuan, with plans to eventually roll out the electronic currency for mass public use. Some 140 million people had opened “wallets” for the digital yuan as of October 2021 and had used the new currency for transactions totaling around 62 billion yuan (\$9.7 billion), Reuters reported in November 2021.

With this growing focus on the “metaconomy,” alongside moves to legitimize and regulate cryptocurrencies, brands and financial institutions are preparing for a future of digital economies.



# Top three banks entering the metaverse

## HSBC

In March 2022, HSBC, the world's seventh-largest bank, announced that it will enter the metaverse in partnership with The Sandbox. The bank plans to buy a piece of land in The Sandbox, which will be developed to engage and connect with sports, esports and gaming enthusiasts.

"The metaverse is how people will experience Web3, the next generation of the internet—using immersive technologies like augmented reality, virtual reality and extended reality," says Suresh Balaji, HSBC's chief marketing officer for Asia-Pacific. "We see great potential to create new experiences through emerging platforms."

## JPMorgan

In February 2022, JPMorgan, the world's fifth-largest bank, won the race to become the first bank in the metaverse. The bank opened its virtual Onyx lounge in Decentraland to prepare for the emerging metaconomy.

"We believe the existing virtual gaming landscape (each virtual world with its own population, GDP, in-game currency and digital assets) has elements that parallel the existing global economy," JPMorgan said in its "Opportunities in the metaverse" report. "This is where our long-standing core competencies in cross-border payments, foreign exchange, financial assets creation, trading and safekeeping, in addition to our at-scale consumer foothold, can play a major role in the metaverse."

## Siam Commercial Bank

SCB 10X, the venture arm of leading Thai bank Siam Commercial Bank, announced in March 2022 that it will launch virtual headquarters in The Sandbox metaverse. The space will be used to showcase the bank's products and services, host virtual events such as workshops and discussions, and offer shared workspace.

"Financial technologies of the future, such as blockchain, digital asset, DeFi (decentralized finance) and the metaverse are core areas of interest for us to explore," SCB 10X's CEO Arak Sutivong says. "We believe that the metaverse will play an important role, enabling infinite creations in a digital world while shaping new frontiers for the economy of the future."

## Why it's interesting

As commerce moves into the metaverse, banks are starting to follow suit. Financial institutions are beginning to carve out space for virtual banking—making the metaverse a one-stop shop for vcommerce (virtual commerce) and perhaps marking the next evolution in neobanking.



# Top three companies launching virtual payment services

## American Express

AmEx is exploring bringing its payments and financial services into the virtual world. The finance company is considering providing card payments, ATM services, banking services and fraud detection to customers in the metaverse, a March 2022 trademark filing suggests. Matt Sueoka, the new global head of Amex ventures, told *Fortune* that he sees Web3 as a “once-in-a-generation opportunity for a potential resetting of infrastructure.”

## Stripe

In March 2022, payments giant Stripe launched a new suite of products to support crypto businesses and payments, including cryptocurrency exchanges, digital wallets and NFT marketplaces. Its clients already include Blockchain.com, Nifty Gateway, Just Mining, and the \$32-billion-valued FTX.

## Off-White

In March 2022, contemporary luxury fashion label Off-White began accepting cryptocurrency for the purchase of physical goods in its Paris, London and Milan flagship stores. With this new payment option, the LVMH-owned brand will let shoppers trade Bitcoin, Ethereum, Binance Coin, Ripple, and stablecoins Tether and USD Coin for Off-White products. To ensure stable pricing and negate cryptocurrency fluctuations, Off-White will use a specialized POS (point of sale) terminal, which finds the best currency-to-crypto exchange rate at the time of transaction, and is compatible with multiple crypto wallets.

## Why it's interesting

The dawn of Web3 and the rise of virtual commerce could bring with them a new paradigm for payments in the metaverse. New services and products are emerging to streamline virtual payments. Could this be the first hint of a new financial infrastructure native to Web3 and the metaverse?

# Top three cryptoliteracy projects

## Mastercard

In February 2022, Mastercard expanded its consultancy services to cover cryptocurrency, NFTs and open banking. The new dedicated services will help banks and businesses adopt digital assets like cryptocurrency and NFTs, address risk assessment for digital currencies and NFTs, and advise on the development of digital wallets, crypto credit cards, and crypto loyalty programs.

“This evolution of consulting is in recognition of the changing world and of our changing business. It’s about helping customers navigate today’s challenges and anticipating what’s next,” says Raj Seshadri, president of data and services at Mastercard.

## US Treasury

The US Treasury launched a program to educate the public about cryptocurrency in March 2022. Nellie Liang, US Treasury undersecretary for domestic finance, said that the goal is to raise awareness about the digital asset as it moves into the mainstream of the financial system, Reuters reported. The new Financial Literacy Education Commission will create educational materials and organize outreach to inform the public about how crypto assets work and how they differ from other forms of payment.

“We’re hearing more and more about investors and households who are purchasing crypto assets, and we recognize the complexity of how some of these assets operate,” Liang said. “It felt like this is an area also where more education (and) more awareness could be helpful.”

## Visa

Visa launched a crypto advisory service for financial institutions and merchants in December 2021. The new service is aimed at financial institutions eager to attract or retain customers with crypto offerings, retailers looking to delve into NFTs, and central banks exploring digital currencies, the company said.

“Crypto for us is a huge new vertical and growth opportunity. And we will be continuing to focus on growing this business moving forward,” Nikola Plecas, Visa’s European crypto lead, told CNBC.

## Why it’s interesting

There is a big gap in crypto-education that leading financial institutions are working to fill. While the vast majority of global consumers (78%) report having some awareness of cryptocurrency, only 15% say they know what it is and can explain it well to someone else. The future of digital economies hinges not only on adoption but also on education, for both consumers and brands.



# Health & wellness





**81% of people think that the health and healthcare industries will be impacted by the metaverse—a statistic that may be surprising, given that the virtual self doesn't experience the same health concerns as the physical self.**

This research indicates that people are bringing their healthy habits into the virtual realm, with global respondents reporting that digital tools help deepen bodily and mental health in the physical world. In the United Kingdom, United States and China, 81% say they switch on digitally to unwind; 55% say they are physically healthier thanks to technology (such as apps, health tracking devices and connected equipment); and 56% say they are mentally healthier thanks to technology. Only 28% say that technology has had a negative impact on their physical and mental health.

The rise of prescription gaming in recent years points to the growing overlap between physical and digital health. In the United States in 2020, the Food and Drug Administration approved the first-ever prescription video game, *EndeavorRX*, which is clinically proven to treat ADHD in children. Therapeutic video game startup DeepWell Digital Therapeutics launched in March 2022 to develop games that treat health conditions including depression and ADHD. Evolving consumer views on tech's role in health and advancing technological capabilities are opening the door to a new realm of metahealth. From the replication of health and wellness habits in virtual environments to the digitization of health treatments, the metaverse is set to offer a wealth of opportunities for health and wellness brands.







## Alo Yoga

The athleisure and lifestyle brand launched a month-long wellness retreat on *Roblox* in February 2022. Called Alo Sanctuary, it offered an immersive wellness space for rest and relaxation, with avatar yoga classes and guided meditations.

“We’re actually asking you to tune out,” Angelic Vendette, the brand’s vice president and head of marketing, told *WWD*. “In the metaverse, you’re consistently activated and there is so much going on. What we’re doing with Alo is completely different. We’re asking you to take a moment to truly lean into your mindfulness, to your mental health, and take a moment for yourself to breathe, to meditate.”

While the activation did include virtual Alo products and loungewear, these weren’t available for purchase—they could only be acquired by completing meditation sessions or yoga classes.

### Why it’s interesting

The goal is “to bring mind-body wellness to the metaverse,” says Alo founder Danny Harris. This activation shows that—despite findings that digital platforms are damaging to mental health—digital engagement and mindfulness need not be mutually exclusive. In an overstimulated virtual environment, there is room for mindfulness and good mental hygiene.

## CVS

Leading drugstore chain CVS plans to bring its pharmacy and health clinics into the metaverse. At the end of February 2022, CVS filed a trademark patenting its stores for the metaverse, as well as sales of virtual goods including prescription



drugs and wellness, beauty and personal care products. The filing also covers non-emergency medical treatment services such as wellness programs, nutritional consultations and counseling.

### Why it's interesting

The metaverse could open an entirely new avenue for customer service and personalized care in the mass-market health retail sector. Following chain drugstores' collective step into the role of care providers, virtual clinics and counseling could prove a way to deepen that shift—alongside an evolution of over-the-counter commerce.

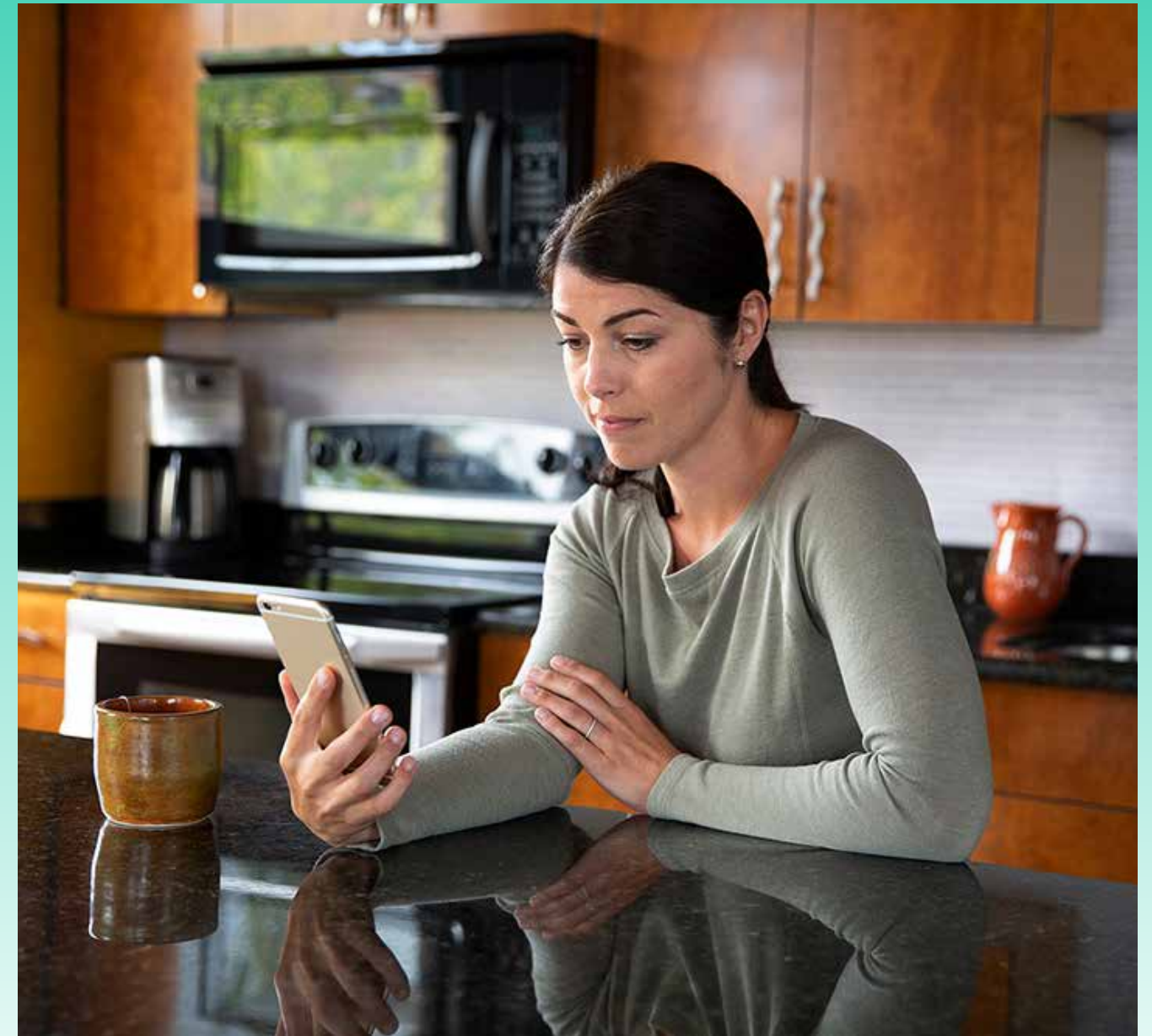
## Sims 4 Spa Day

A September 2021 update to *The Sims 4 Spa Day* game pack adds new options for avatar pampering and wellbeing, and has a heightened focus on wellness and mental health. It expands the original version's spas and gyms—which let Sims spend leisure hours in saunas, getting a massage, or taking a mud bath—with new yoga skills, rewards for high-level meditation, and wellness activities for kids, alongside the introduction of facial masks, manicures, pedicures and customizable nail designs. The update also lets Sims earn money by teaching mindfulness, developer Maxis Studios says. Players can now select Zen Guru, Self-Care Specialist, or Inner Peace for their Sims from the game's Aspirations panel.

### Why it's interesting

Beauty pampering and indulgence are making their way into the metaverse—alongside mental health for your avatar. With 81% of people already saying they turn to tech to unwind, there is room to reinvent what leisure and relaxation look and feel like in the metaverse. As more of daily life migrates into the metaverse,

Healthy habits are  
being transferred into the  
virtual realm.





that is sure to include mental health practices. The future of virtual living won't be complete without outlets for mindfulness and mental wellbeing.

## Pfizer

Pfizer is vaccinating avatars against COVID-19 in *Grand Theft Auto*. The November 2021 campaign from Pfizer Brazil created an in-game mission for *Grand Theft Auto RolePlay* players, in an effort to encourage Brazilian gen Zers to get vaccinated. After completing the mission, avatars receive a blue badge on their arm to mark their vaccination status. They are also encouraged to share screenshots of their avatar alongside selfies or photos with the hashtag #InGameVaccine, to declare that they have gotten at least one COVID-19 shot in the physical world.

## Why it's interesting

Healthy habits, which are both an identity marker and cultural status symbol, are being transferred into the virtual world. Pfizer's campaign shows that physical health practices—while not necessary for avatars—could still translate into virtual spaces as a way to communicate personal values, identity and social status.

## DeHealth

British nonprofit DeHealth announced the launch of the “world's first healthcare metaverse” in December 2021. The decentralized health metaverse is designed for providers and patients alike; it aims to function as a new space for doctors to work in, confer with each other and consult with patients in full 3D format, as well as offer a way for patients to earn virtual assets by selling their anonymized medical data. A beta version of the DeHealth metaverse is slated for release in late 2022.

## Why it's interesting

The metaverse is setting the stage for the next evolution of telehealth. “The metaverse presents an immense innovation opportunity for the healthcare sector,” says Mark Westall, senior vice president for research and innovation at health communications agency M Booth Health. “Just as telehealth shifted the patient-healthcare provider relationship from in-person to hybrid, the next stage will introduce augmented and virtual reality, transforming how healthcare is delivered.”







# Food & drink

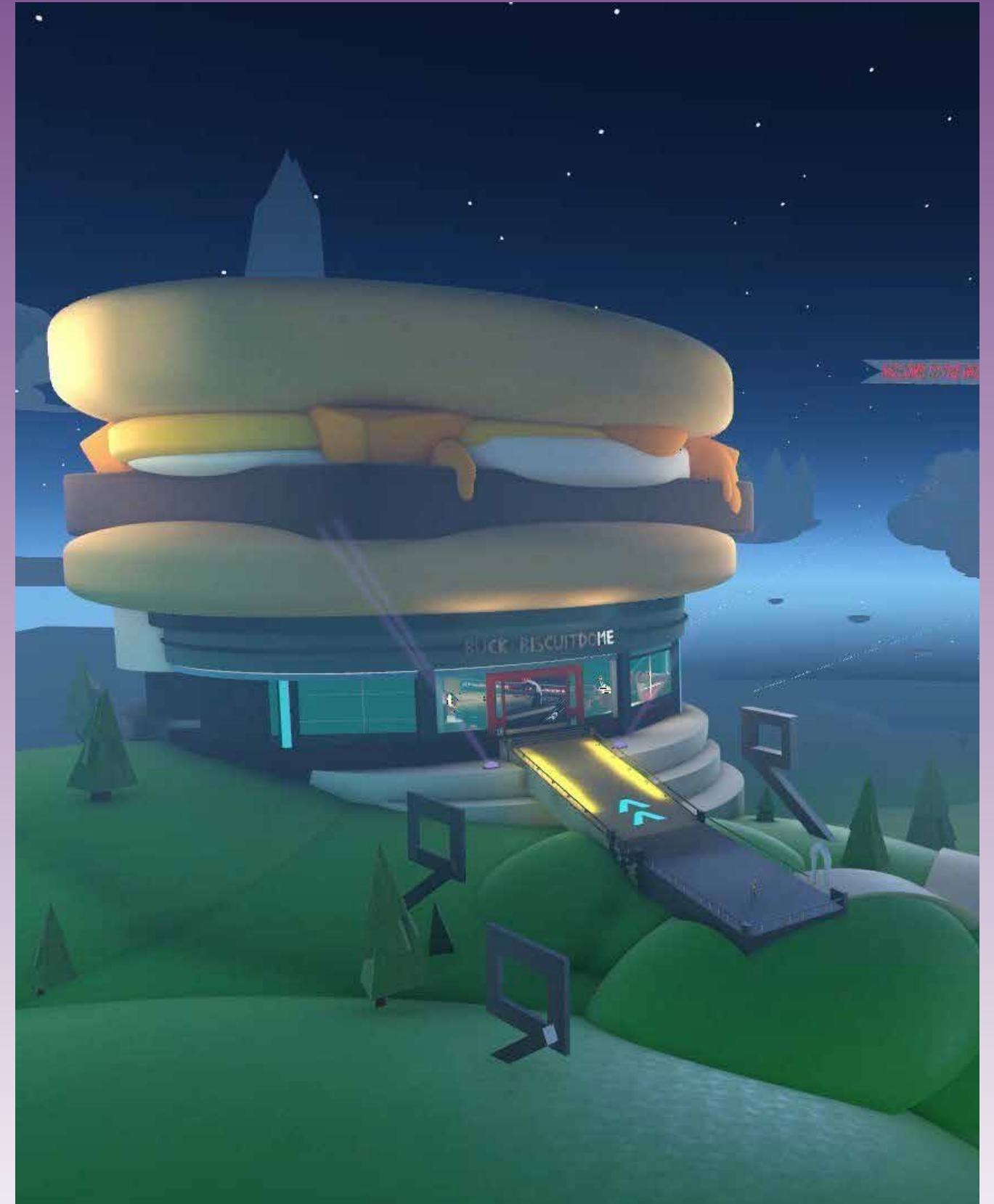


**76% of people think restaurants and bars will be impacted by the metaverse, and 74% of people think the food and drink industry (items bought in a store or supermarket) will also be impacted.**

The culture of food already has a foothold in virtual worlds. In a February 2022 article titled “How The Sims Became the Internet’s Most Exciting Place to Eat,” the *New York Times* explores how the video game has deepened players’ knowledge and appreciation of global cuisine—with dishes like Indian bhel puri, Japanese beef yakisoba, Brazilian feijoada, and British beef Wellington—and has become “a world where players can farm, forage, cook, and learn about the many ways people experience food.”

The cachet of food goes well beyond learning about its cultural origins and preparation, however; sharing a meal is a universally recognized social ritual. For the 70% of people who believe that the metaverse will be a place to socialize—jumping up to 82% among those who are familiar with the metaverse—virtual dining could be a big part of the metaverse’s social element.

But what does a dining experience look like in the metaverse? Although people aren’t able to eat or drink digitally, food and drink brands are experimenting with new ways to experience food. The metaverse and its accompanying digital toolbox are already offering new channels of engagement and experimentation for food brands.







**“Advertising that gives the audience something to do, use, share, experience, and be part of will differentiate brands.”**

*Daniel Bonner, global chief creative officer, Wunderman Thompson*

## Coca-Cola

In February 2022, Coca-Cola sponsored the first Indian wedding to take place in the metaverse. The virtual event, which was brought to life in partnership with Wavemaker and ITC on India's Yug metaverse platform, featured a Coca-Cola branded dance floor and a bar stocked with Coke cans, and guests left with Coca-Cola discounts and gift cards to use in the physical world.

“We are in an era of digital disruption, where technology and digitization are key catalysts,” says Sumeli Chatterjee, head of integrated marketing experiences (IMX) at Coca-Cola India. “We’re devising innovative ways to reach our consumers through a host of digital mediums.”

The brand also launched its newest flavor in *Roblox* in April 2022. Coke Zero Sugar Byte dropped a month before hitting physical shelves in Coke's branded *Fortnite* experience, Pixel Point, which opened in March.

### Why it's interesting

When entering the metaverse, food and drink brands need to think beyond the physical act of imbibing. Food is a focal point in social gatherings, celebrations and cultural events, and brands are starting to experiment with creative ways to capture that value-add when virtual guests can't physically eat or drink. Coca-Cola demonstrates how it's possible to trade on cultural capital in the metaverse in place of consumable products.

## Miller Lite

Miller Lite's 2022 Super Bowl advertising campaign took place entirely in the metaverse. Rather than airing a live ad during the game, Miller Lite opened its own bar in the metaverse. The Meta Lite Bar, hosted in Decentraland, was the





first-ever brand-hosted bar in the metaverse and the only place to watch Miller Lite's Big Game ad. The bar, stocked with virtual Miller Lite pilsners, also featured activities including darts, billiards, a stage with virtual instruments, a photo booth and a jukebox. "Now you and your avatar can enjoy Miller Time with friends," said Sofia Colucci, global VP of the Miller family of brands.

### Why it's interesting

The metaverse is opening the door to a new realm of experiential marketing and advertising for food brands. Traditional advertising channels have limited food and drink brands to showing other people enjoying eating and drinking. The metaverse, in contrast, lets brands recreate the social element that accompanies the act of eating and drinking—building an ecosystem of virtual experiences that are engaging, entertaining and interactive.

For the future of marketing and advertising, "participation will outsmart persuasion," Daniel Bonner, global chief creative officer at Wunderman Thompson, tells Wunderman Thompson Intelligence, "meaning that, more often than not, 'advertising' that gives the audience something to do, use, share, experience, and be part of will differentiate brands."

## Flyfish

The first NFT restaurant is set to open its physical doors in New York City in 2023. Flyfish Club will be a members-only restaurant where membership is purchased on the blockchain through an NFT and owned by the token-holder. The physical venue will include an upscale seafood restaurant, a cocktail lounge, and an exclusive omakase-style room for primary members. Members may be able to lease, sell, or use their membership on a monthly basis—a relatively new concept for the dining industry.

### Why it's interesting

The metaverse is influencing physical dining experiences and establishments, while also carving out a new dimension of social status signifiers. "Social currency is a big part of this," David Rodolitz, founder and CEO of VCR Group, the hospitality and restaurant group behind Flyfish, told the *Washington Post*. "People are communicating digitally about what they like and who they are." Fine dining is leveraging NFTs to unlock premier access and consumer loyalty for the next era of metaverse engagement, and setting a new digital standard for velvet-rope exclusivity, VIP experiences and social status markers.

# Top five brands opening virtual restaurants

## Chipotle



With the April 2022 launch of Chipotle Burrito Builder in *Roblox*, the brand lets users roll virtual burritos in exchange for IRL food vouchers. “We’ve tapped into play-to-earn, an emerging engagement model in the metaverse,” says Chris Brandt, chief marketing officer at Chipotle.

## McDonald's

In February 2022, McDonald's filed several trademarks hinting at plans to sell virtual food and beverages in the metaverse.

## Wendy's



Wendy's opened Wendyverse, a virtual restaurant on Meta's Horizon Worlds, in April 2022. The activation includes Town Square Central, the first Wendy's restaurant in virtual reality, and Partnership Plaza, a March Madness-themed experience.

## Panera

US bakery and cafe chain Panera Bread filed a trademark application for the Paneraverse in February 2022, staking its claim in the metaverse's restaurant and café territory.

## Jose Cuervo



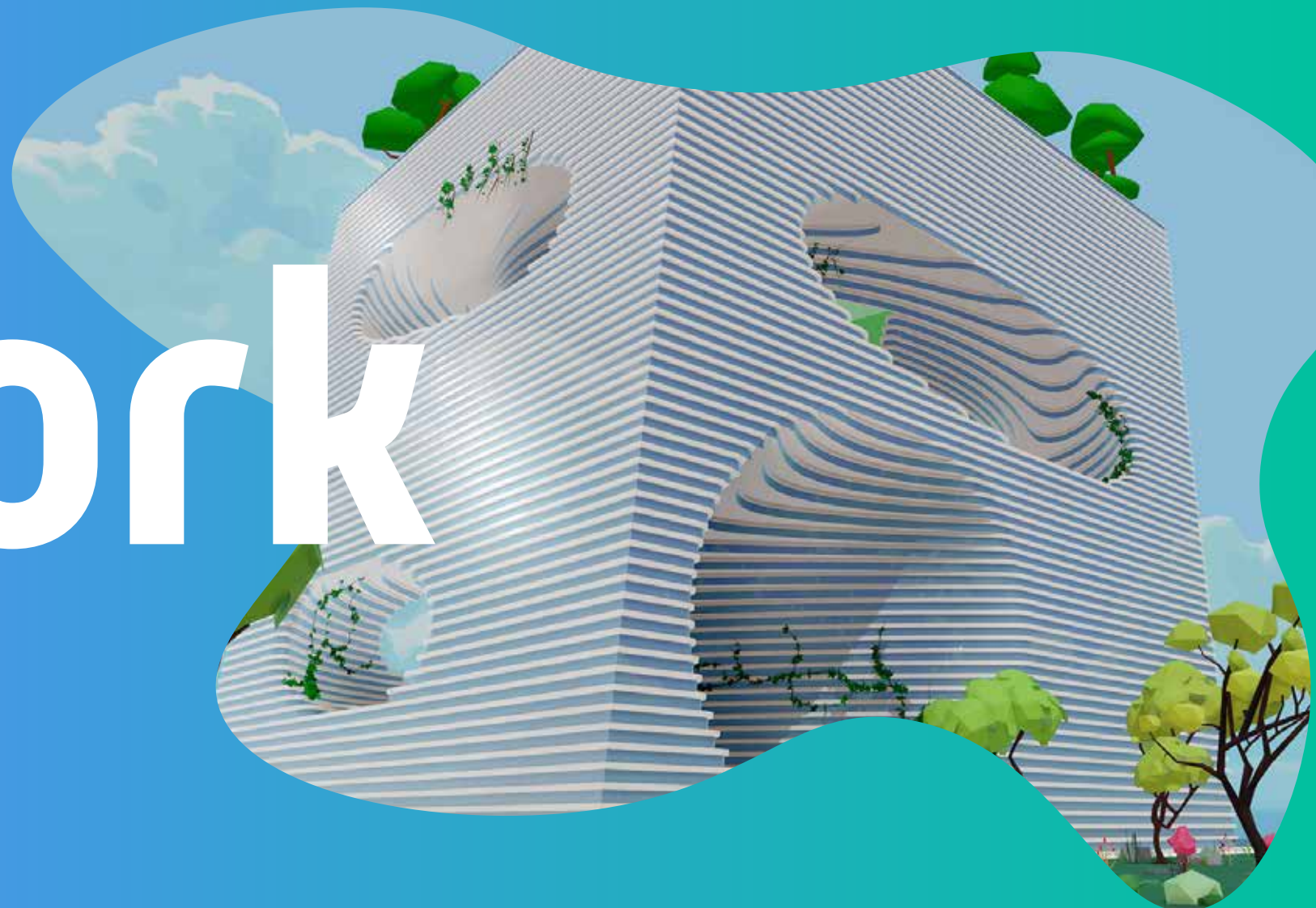
In March 2022, Jose Cuervo announced plans to open the first distillery in the metaverse. The metadistillery, located in Decentraland, will be designed by Bompas & Parr and constructed by M2 Studio. Visitors can expect virtual experiences and tequila education, as well as access to limited-edition products and entertainment.

## Why it's interesting

As it matures, the metaverse will become a digital layer of everyday life, virtualizing everyday activities and daily habits—like gathering with friends and family over a meal. How will this translate into the virtual realm? Restaurants are getting ahead of this question by carving out space to recreate their eateries as gathering places for avatars.



# Work



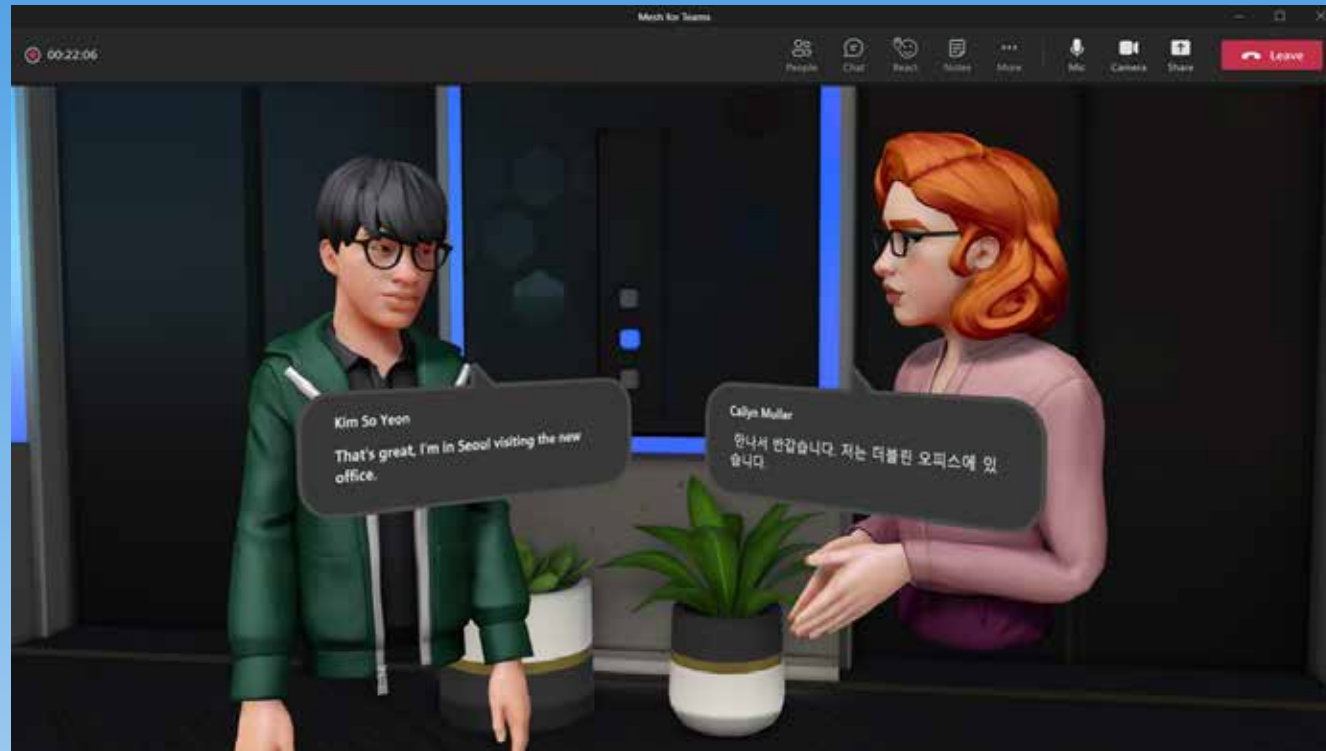


**With the metaverse set to reach \$800 billion in global market revenue in 2024, according to *Bloomberg* analysis, companies are pouring investment into this fast-growing opportunity.**

From hiring metaverse talent and creating dedicated teams to bringing in top architects to design virtual headquarters, no expense is being spared. Meta spent over \$10 billion on its Reality Labs metaverse division in 2021 and companies including Disney, Nike and WPP are recruiting talent to build out their metaverse vision.

According to a Wunderman Thompson Data survey, 85% of people think the metaverse will impact employment, 83% think that the metaverse will impact business-to-business, and 51% believe it will be a place to work. “It is super-important for companies and brands to have skilled staff in the metaverse and Web 3.0 space,” Mehta Mehta, global executive creative director of Hogarth, tells Wunderman Thompson Intelligence. “With every new environment or platform comes new behaviors and codes of existence. The metaverse will birth new industries and jobs that do not exist right now.” A new era of how and where we work is being led by the ever-evolving metaverse.





**“The metaverse will birth new industries and jobs that do not exist right now.”**

*Mehta Mehta, global executive creative director, Hogarth*

## Microsoft

Social presence and teamwork are being leveled up by Microsoft’s introduction of mixed reality (MR) Mesh capabilities for its Teams communication platform, due to launch in 2022. Coworkers will be able to attend meetings as customized avatars and collaborate on projects through shared holographic experiences. In addition, companies will be able to build virtual environments that Microsoft described as “a gateway to the metaverse.”

### Why it’s interesting

Remote and hybrid work are here to stay, as companies from Spotify and Dropbox to Amazon and Salesforce permanently embrace working from home. As tech companies double down on improving the remote-work experience, Microsoft is leading the charge by incorporating its expansive technologies into Teams, with the vision to be the go-to platform enabling work and collaboration in the metaverse.

## SK Telecom

South Korean company SK Telecom has launched a dedicated metaverse division offering three distinct services: Ifland, Jump and Jump Studio. Ifland is a social networking platform in a virtual world that hosts events and seminars; Jump focuses on augmented reality (AR) capabilities and experiences; and Jump Studio “transforms reality into holograms” using MR technology.

### Why it’s interesting

SK Telecom started developing proprietary technologies in AR and virtual reality in 2021, swiftly spotting expansion potential by investing in metaverse products. This has led the telecommunications company to build on its own technology services for consumers and businesses rather than depending on partnerships.



## Vice Media Group

Located on the Decentraland platform, ViceVerse is the all-new, high-design virtual office for Vice Media Group employees. The virtual headquarters, designed by Danish architecture firm Bjarke Ingels Group (BIG), will be used as an innovation lab for teams to work on metaverse-related projects, including NFTs, DAOs and Web 3.0.

### Why it's interesting

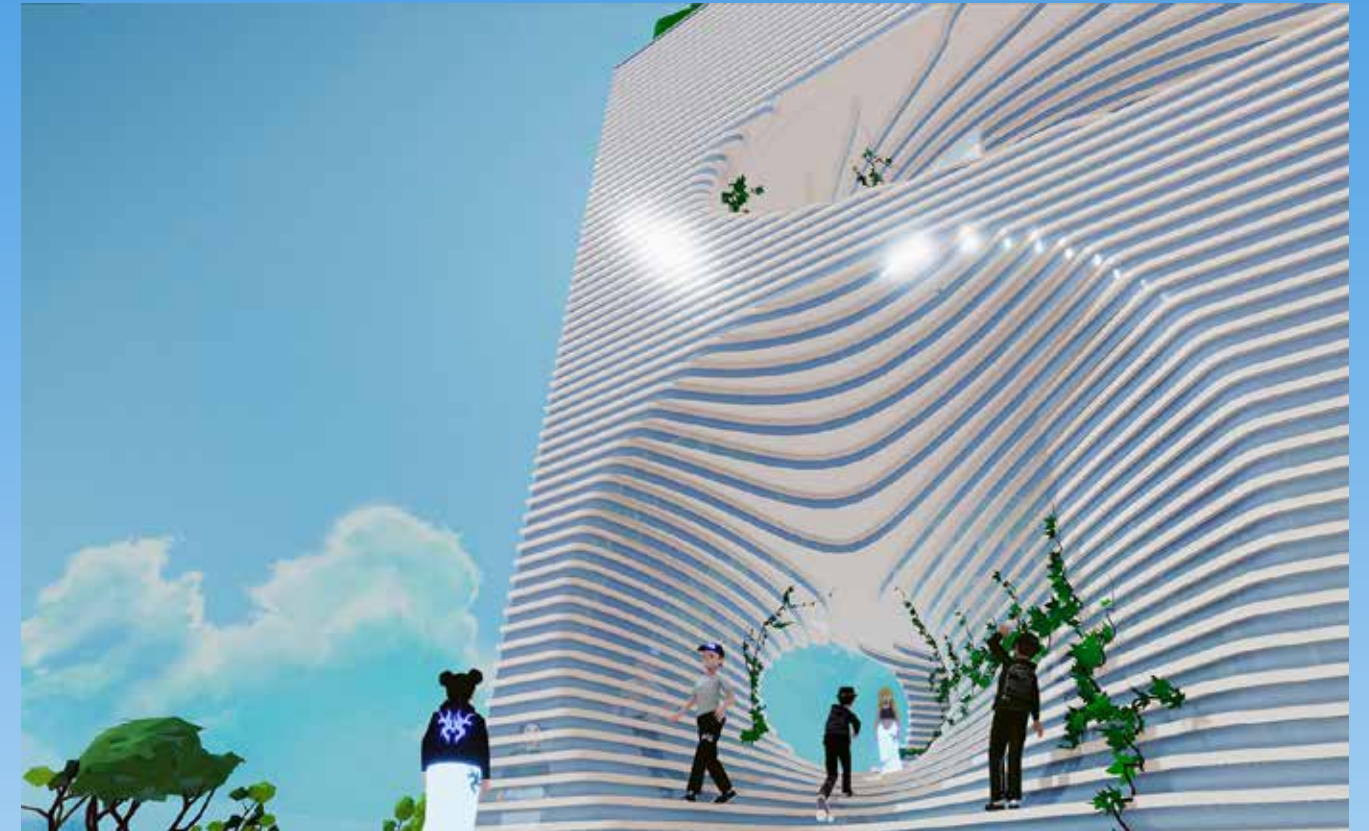
This isn't just another virtual office. ViceVerse has been designed by award-winning Danish architecture firm BIG, which is renowned for pushing architectural boundaries. Vice Media Group tapping BIG for its permanent virtual HQ is a sign that investment for employees in the metaverse will be the way of the future. Having an inspirational virtual space to visit will also encourage creativity and attendance.

## WPP's Hogarth

The Metaverse Foundry by WPP-owned Hogarth launched in February 2022 and aims to deliver brand experiences in the metaverse. A global team of producers, virtual artists, developers and technologists are available to partner with WPP clients on metaverse-related projects from design to execution.

### Why it's interesting

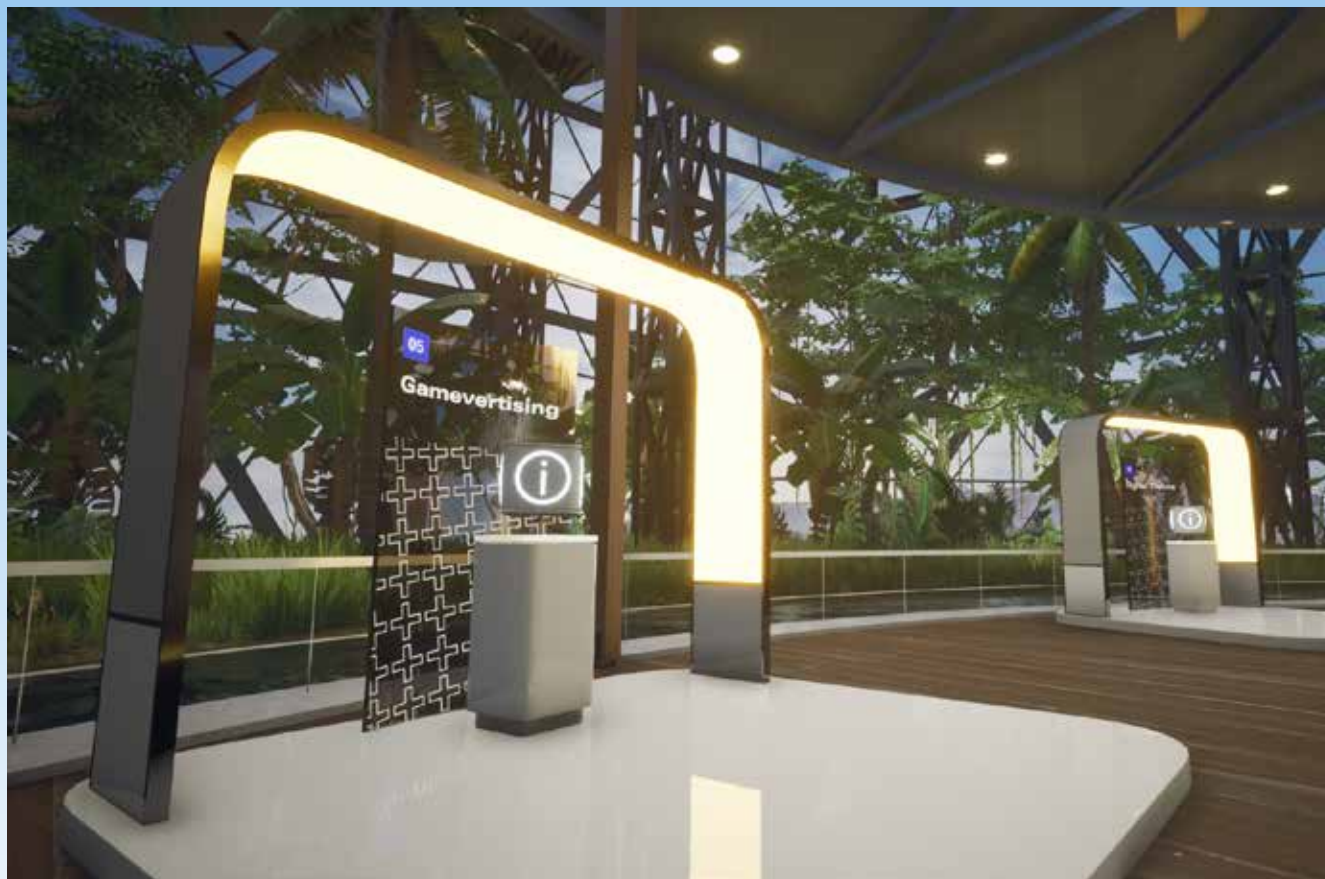
A 700-strong team has been put together to form The Metaverse Foundry. Mark Read, CEO of WPP, states that the agency's clients are already "seizing the opportunities to connect with their customers presented by the metaverse" and are looking for partners to work with on these projects. WPP is solidifying the creative and marketing partnership with the introduction of The Metaverse Foundry.





"It is super-important for companies and brands to have skilled staff in the metaverse and Web 3.0 space."

*Mehta Mehta, global executive creative director, Hogarth*



## Wunderman Thompson

The Wunderman Thompson Metaverse is a virtual space designed to guide clients through the metaverse, from customizing avatars to exploring the future of retail. It debuted at the Consumer Electronic Show (CES) on January 6, 2022, and has since hosted a number of clients and Wunderman Thompson events.

### Why it's interesting

The best way to experience the metaverse is by diving right into it. The Wunderman Thompson Metaverse is designed to educate visitors on the metaverse with dedicated information kiosks, and offers a spontaneous and gamified approach for users to explore the space. It serves as a first-hand introduction to the metaverse for clients, illustrating what it is and how their brands can better connect with current and new audiences.

## Five recent metaverse hires

**Dale Imerman** joined WPP as global director of metaverse partnerships, helping the agency build out its creative technology offerings across the group.

Disney appointed **Mike White** in February 2022 to oversee the company's metaverse strategy. White is stepping up as senior vice president of the company's new Next Generation Storytelling and Consumer Experiences division.

Accounting firm **Prager Metis** appointed **Jerry Eitel** as chief metaverse officer (CMVO) in March 2022. Eitel will manage the strategy, partnerships and projects connected to the metaverse, as well as the company's office in Decentraland.

**Roblox** hired **Gemma Sheppard** as its metaverse global fashion director. Sheppard will guide the looks and styles of avatars in the game, with the aim of being inclusive and allowing gamers to express themselves through personalization.

In February, **Universal Music Group** hired **Richard Cusick** as chief product officer for global ecommerce, to help the music company expand its offerings into areas such as Web 3.0.

### Why it's interesting

Companies are restructuring around the metaverse with dedicated leaders and teams to guide their metaverse strategy.





# Entertainment & sport

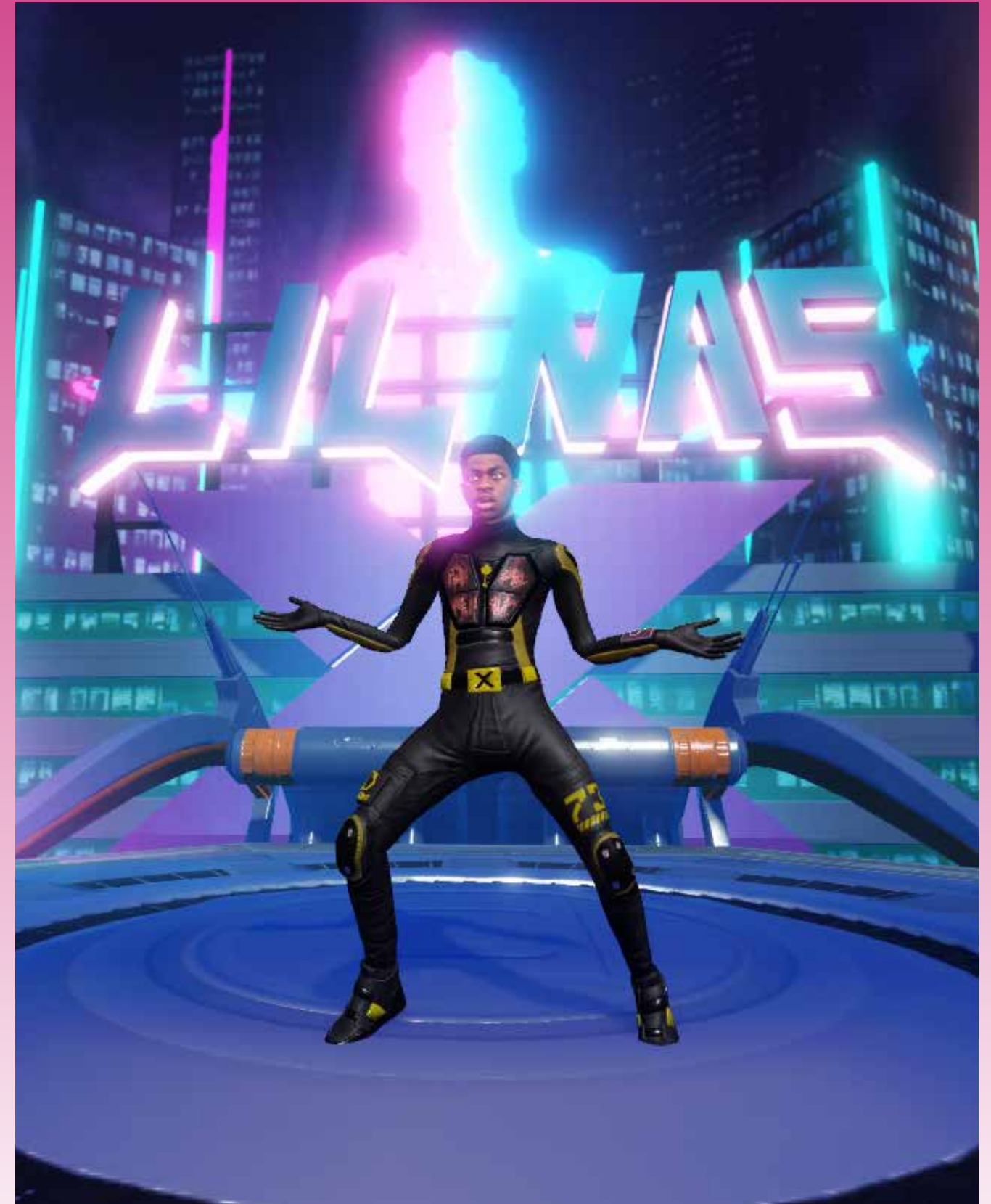


**90% of consumers who are familiar with the metaverse believe that it will bring changes to the entertainment industry, and 82% believe it will bring changes to the sports sector.**

The global entertainment industry is no stranger to new technology, so it's not surprising that companies around the world are betting on the metaverse's impact on the future of shows, sports, and entertainment of all kinds. Household brands such as Sony and Disney are expanding their brand portfolios into the virtual realm, assigning leaders and elevating their current offerings to keep pace with the interactive and interconnected engagement of the metaverse. From sports to movies and everything in between, here are a few prominent forces taking center stage in the metaverse.

## Sony

The entertainment giant plans to release a movie made using the PlayStation game-builder *Dreams*, presumably crafting an interactive gamified experience for the film. *A Winter's Journey* will reportedly blend live action with computer-generated and hand-painted animation characters, and represents the first time *Dreams* has been used to create a feature film.



**“Audiences can actively engage with favorite sporting events, stories, teams and players.”**

*Bob Chapek, CEO, Walt Disney Company*



### Why it's interesting

Sony has a hand in multiple projects that are bridging the metaverse and entertainment industry. In February 2022, it released its VR2 headset and controllers for the PlayStation, and also announced plans to launch more than 10 live service games by March 2026 after its acquisition of gaming company Bungie. Sony's array of investments indicate a steadfast approach to expanding its technological reach into an elevated, interactive digital realm for entertainment.

### Manchester City

In the United Kingdom, Premier League champion Manchester City Football Club announced plans in February 2022 to build the first football stadium in the metaverse. In collaboration with engineers from Sony, the club plans to build a digital replica of its Etihad Stadium, enabling fans to watch and experience matches no matter where they are in the world. Sony subsidiary Hawk-Eye, which uses skeletal-tracking technology, reportedly visited the physical stadium in order to digitally map it before building it in the metaverse.

### Why it's interesting

Manchester City is one of the first global sports teams and major clubs to publicly invest in the metaverse, indicating that sporting events will have a stake in the virtual realm. The ability to showcase future matches in an engaging, lifelike way is an untapped part of football that may change the experience for fans in the future. The club is investing in a unique parallel to the physical fan environment that could serve as a blueprint for other professional teams and clubs interested in joining the virtual realm.



## The Recording Academy

The 64th Grammy Awards were presented in *Roblox* from March 30 to April 3, 2022, appearing in the metaverse for the first time in the music award show's history. The interactive gaming platform hosted virtual meet and greets with singers, live performances, games, digital merchandise, and even a red-carpet area for photos.

### Why it's interesting

The Recording Academy's goal was for the event, sponsored by Mastercard, to serve as an insightful experiment on how to better engage new younger viewers and fans. The move echoes some big-name music concerts held in the metaverse in 2021, including notable performances by Travis Scott and Ariana Grande, hosted on *Fortnite*. The Recording Academy's copresident Panos A Panay told *Forbes* that collaborating with *Roblox*'s virtual technology "alters the very nature of musical expression."

## Disney

Disney is preparing for the metaverse by appointing a new leader to guide the brand into the virtual realm. Mike White, who joined Disney in 2011, will oversee a team working across technology, storytelling and strategy to explore "strategic pillars of storytelling excellence, innovation and audience focus," said CEO Bob Chapek. White was named as vice president of the company's new Next Generation Storytelling and Consumer Experiences division in February 2022.

### Why it's interesting

Disney is advancing on multiple leads into the metaverse, all in the name of interactive entertainment. In the same month that the company announced







White's appointment to advise on the larger leap into the digital realm, it also revealed plans to take its sports streaming and betting sectors into the virtual sphere. Speaking on an earnings call, Chapek said that the company was bidding its gaming and betting arms on the metaverse and stated that he was excited for "the opportunity to build a sports machine akin to our franchise flywheel that enables audiences to experience, connect with, and become actively engaged with their favorite sporting events, stories, teams and players."

## Pooja Entertainment

Bollywood company Pooja Entertainment purchased virtual land for just over \$5,000 in February 2022 from a company built on the Ethereum blockchain. Based in Mumbai, it is the first Bollywood production company to acquire land in the metaverse, which it purchased as an NFT to build a virtual movie-theater experience in what it calls the Poojaverse. The company tweeted the announcement in tandem with a trailer for its upcoming film *BadeMiyanChoteMiyan*, and a link to its virtual property.

### Why it's interesting

Pooja Entertainment's public purchase indicates a global effort and interest in expanding entertainment experiences into the metaverse. Consumers anticipate that the company will incorporate augmented reality and virtual reality for viewers, as well as virtual screenings and merchandise to complement film releases in a potentially mixed reality format. The Indian government recently backed the use of blockchain technology in the future, which is indicative of the growing popularity of NFTs in the country.



# Fashion





## High fashion is staking a claim in the metaverse, proving that self-expression through style appeals as much to consumers in the digital realm as it does in the physical world.

Eighty-five percent of consumers say they believe the metaverse will impact the fashion industry. In February 2022, Dolce & Gabbana embraced the metaverse at Milan fashion week, blending a virtual 3D catwalk with a physical runway as models showed off the brand's latest designs. French luxury goods group Kering is scaling up its own metaverse development with a "full team dedicated to Web3/metaverse, another team in Gucci, and in Balenciaga," as revealed by CEO François-Henri Pinault in an earnings report. "The merger of augmented reality and virtual reality will transform the way that we will be building ecommerce." This is only the beginning—we're uncovering other top-tier fashion brands staking their claim in the metaverse.

### Decentraland's Metaverse Fashion Week

Decentraland hosted the first-ever Metaverse Fashion Week in March 2022, with appearances by over 60 high-fashion brands including Dolce & Gabbana, Dundas, Tommy Hilfiger, Philipp Plein, Fred Segal and Karl Lagerfeld. The weekend was filled with brand-sponsored catwalks, a virtual shopping district, live panels, concerts and interactive events.

#### Why it's interesting

Metaverse Fashion Week set a new standard for luxury fashion and consumer engagement in future liminal events. David Cash, the event's lead curator, spoke







about the way digital fashion allows participants to express themselves and their creativity via avatars: “We’ve sought to present fashion in every form possible, from runway shows to retail experiences, fashion presented as art, film, photography, and even fashion presented in ways that extend beyond the confines of reality—as, in the metaverse, anything is possible.”

## Gucci

In February 2022 Gucci announced it was building a virtual world in the metaverse with The Sandbox, planning for new engagement and immersive experiences as part of its Gucci Vault experimental online space. As part of the initiative, the following month the luxury fashion giant also unveiled the Gucci Grail NFT project with digital accessories hub 10KTF, which features digital



outfits from 11 selected NFT collections including Bored Ape, World of Women and Cool Cats. The custom Gucci looks are designed for consumers who want to express themselves in Gucci in the digital world.

### Why it's interesting

Gucci is laying the groundwork for future digital design and high fashion in the metaverse with virtual gear and collectibles, as it develops its anticipated virtual world. Customers have shown a huge interest in purchasing virtual Gucci gear in both the Gucci Grail drop and its previous Gucci Garden experience, sometimes selling digital items for more than their physical counterparts. As interest peaks, Gucci is welcoming eager consumers into its immersive branded world, where connection and community are the factors that will drive players to monetize their digital experience.



## The Fabricant

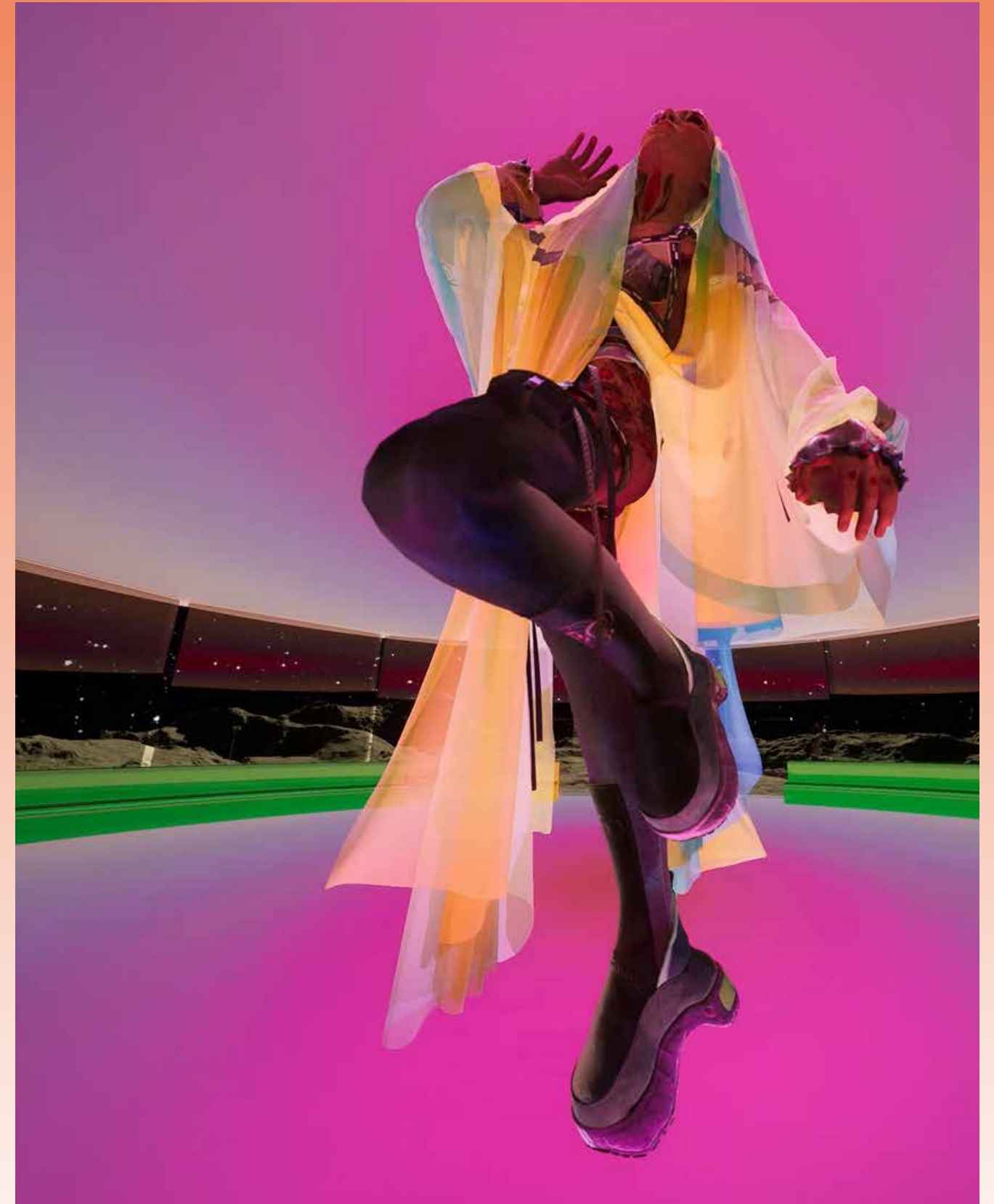
Contemporary digital artist Krista Kim and digital fashion house The Fabricant designed a “fluid” digital fabric for Nymph, a new clothing collection, in January 2022. Designed to look like water, the Transcendence material was used to create a headdress, which forms the main piece in the collection, through 3D rendering on Unreal Engine software. The Nymph collection is hyper-realistic, consisting of gothic undergarments, thigh-high boots, a traditional Dutch Hemdrok jacket, and the Nymph headdress.

### Why it's interesting

The collection's design is modeled after Kim's meditative artistic approach, which parallels an altered state of consciousness. Kim tells Wunderman Thompson Intelligence that her work “expressed fluidity—we are becoming more fluid because of digital technology. As we enter the metaverse, cultures, gender, race, religion, will become fluid because we transcend the reality of our world.”

## Roblox

In February 2022, stylist Gemma Sheppard was hired by Metaventures and the *Roblox*-focused development studio Dubit as the first metaverse global fashion director. Building on a career that encompasses projects with leading industry names such as Tom Ford, Alexander McQueen and Stella McCartney, Sheppard will work directly with Dubit and Metaventures to help real-world fashion brands enter the metaverse, through designing their own digital lookbooks and coordinating live fashion events.





### Why it's interesting

By hiring a professional in the fashion industry, *Roblox* is leaning into the impact that fashion and design have on participants in the metaverse. The brand is elevating its digital offering by providing real-world expertise for its virtual constituents, who are eager to express themselves digitally and willing to pay to dress in brands they enjoy wearing in the physical world.

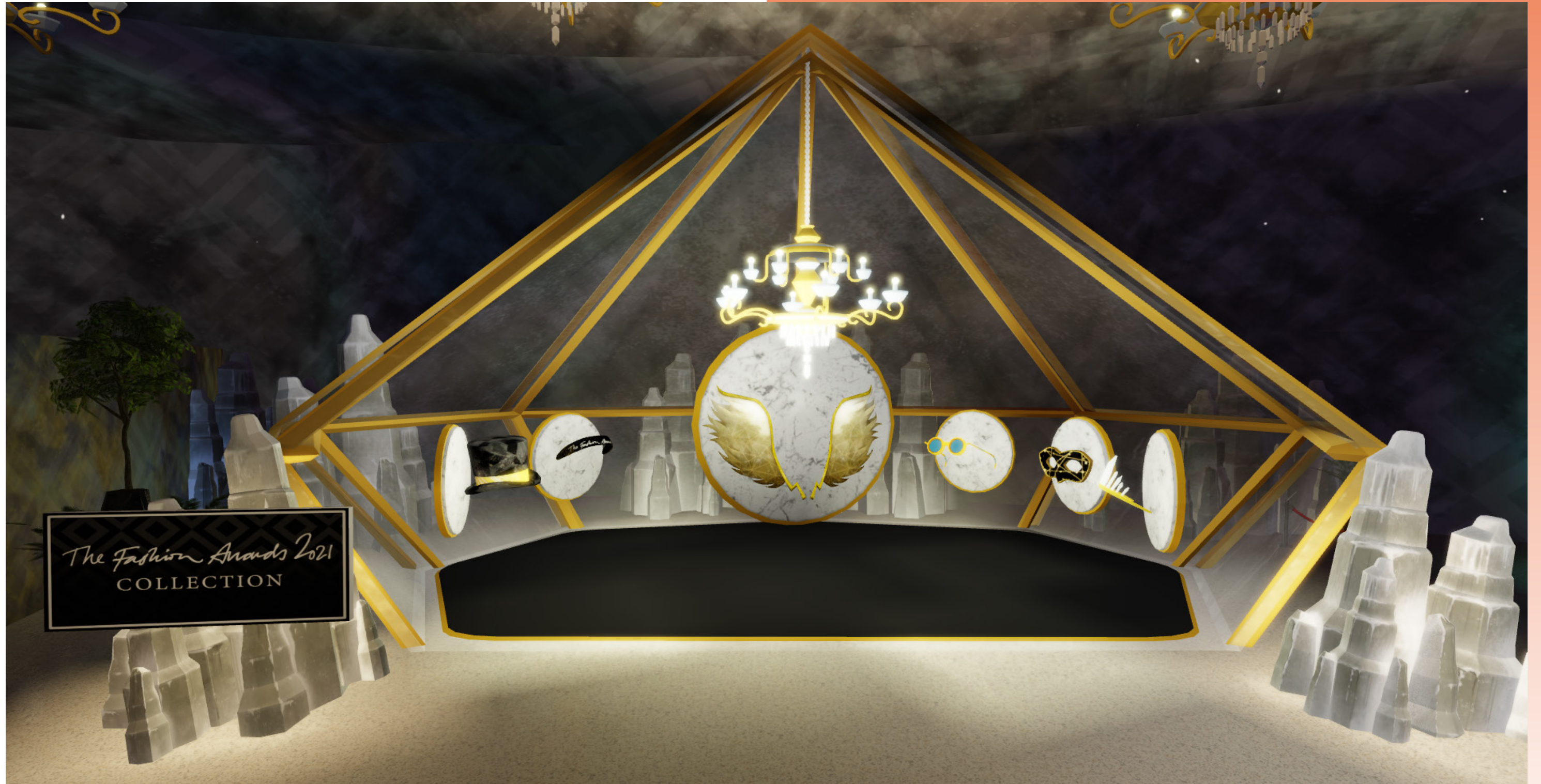
### Roksanda

Fashion brand Roksanda also made waves in the virtual realm in February 2022 when it debuted its first digital fashion piece during its London Fashion Week show at the Tate Britain art gallery. The house announced that its final look from the show, created in partnership with the Institute of Digital Fashion, could only be purchased as an NFT.

### Why it's interesting

A well-known favorite of stylish, high-profile figures including Michelle Obama and the Duchess of Cambridge, Roksanda aimed its NFT launch at younger consumers interested in digital fashion. The augmented reality garment, available as an Instagram filter in three tiers of rarity, was priced according to how many NFTs of the garment were available, offering a range of engagement options for different customer price points. Institute of Digital Fashion cofounder Leanne Elliott Young told *Glossy* that the collaboration was structured “on the creative possibilities and functionalities to push the physical boundaries of creative freedoms in the NFT.”

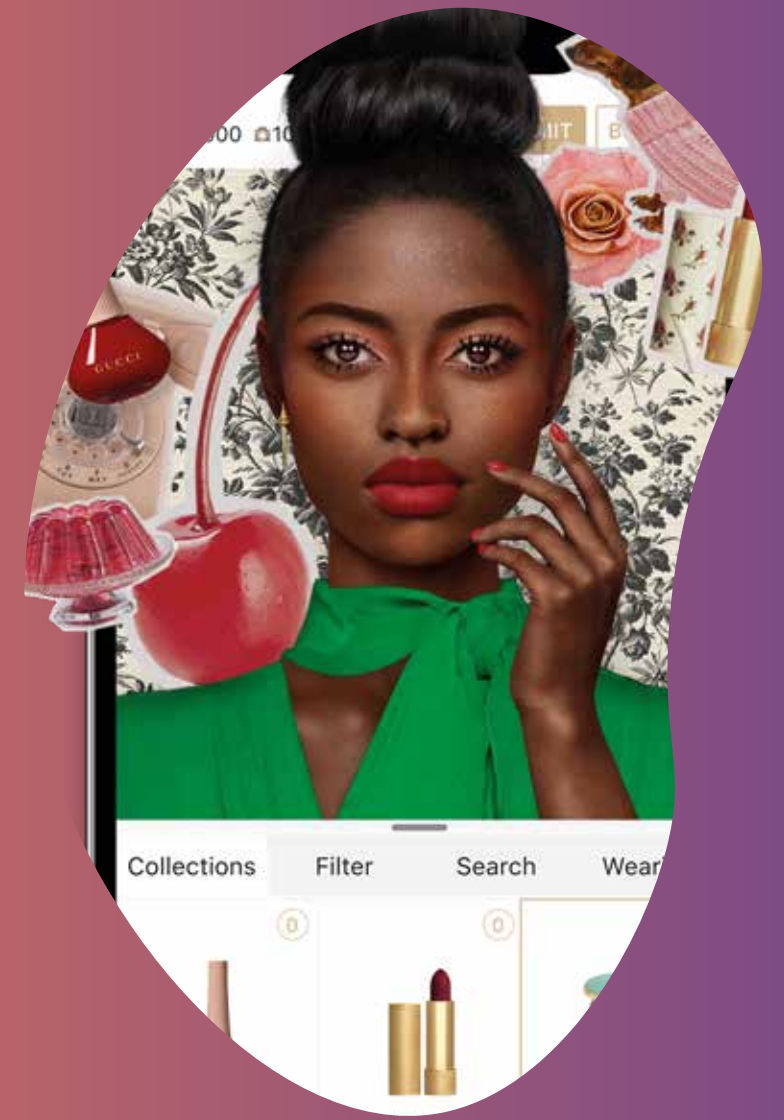








# Beauty





## Mainstream global beauty brands are investing in innovative ways to engage with their customer base in the metaverse.

Seventy-six percent of consumers want their avatar to express their creativity and individuality in ways they can't achieve in the physical world, and 80% believe the metaverse will impact the beauty industry. Elevating 2D ecommerce practices that many companies have embraced in recent years, beauty brands are exploring new forums for digital engagement with consumers on platforms they already use and enjoy. In February 2022, beauty conglomerate L'Oréal reportedly filed 17 trademark applications relating to the metaverse. The applications spanned L'Oréal's brand portfolio for NFTs, retail for virtual perfume, cosmetics, styling for avatars and more. Michelle Phan, founder of EM Cosmetics, told *WWD* that she believes the metaverse "is the next frontier" in beauty, predicting that the industry would evolve in the digital realm. "In the metaverse, your avatar is a reflection of your personality," she stated. "You can be anything there. Therefore, we will have a new definition of what beauty is."

**"In the metaverse, your avatar is a reflection of your personality. You can be anything there. Therefore, we will have a new definition of what beauty is."**

*Michelle Phan, founder, EM Cosmetics*





## Estée Lauder

The beauty giant entered the metaverse in January 2022 with the launch of its ecommerce platform, Maison Too Faced, defined as a “first-of-its-kind retail experience consisting of a 360-degree virtual environment with a fully functioning economy, and the transferability of avatars and digital assets.” The branded metaworld allows shoppers to interact with other guests and mascots, compete at in-world games, and win discount codes for future purchases. No app or download is required—customers can access the world in real time via any browser.

### Why it's interesting

The fully immersive realm allows consumers to engage firsthand with the brand, enjoy new releases, and receive personalized shopping assistance while interacting virtually with friends and fellow shoppers. Sarah Lynn, Maison Too Faced brand general manager for the United Kingdom and Republic of Ireland, stated that the platform “will push boundaries with innovative gamification and entertainment, while keeping a user-friendly, seamless and enjoyable purchase journey at the heart of the experience.”

## Valdé Beauty

Valdé Beauty held a product launch party in January 2022 in a new type of venue: the metaverse. With a live DJ, virtual product displays, and influencers showing off their styles, the launch celebrated three limited-edition luxury lipstick cases, each of which was displayed on the NFT gallery walls. By clicking on any of the NFTs on display, customers were redirected to purchase one of the lipstick “armor” cases for \$1,200, which included a full set of the brand’s lipstick shades and a matching NFT art piece.







### Why it's interesting

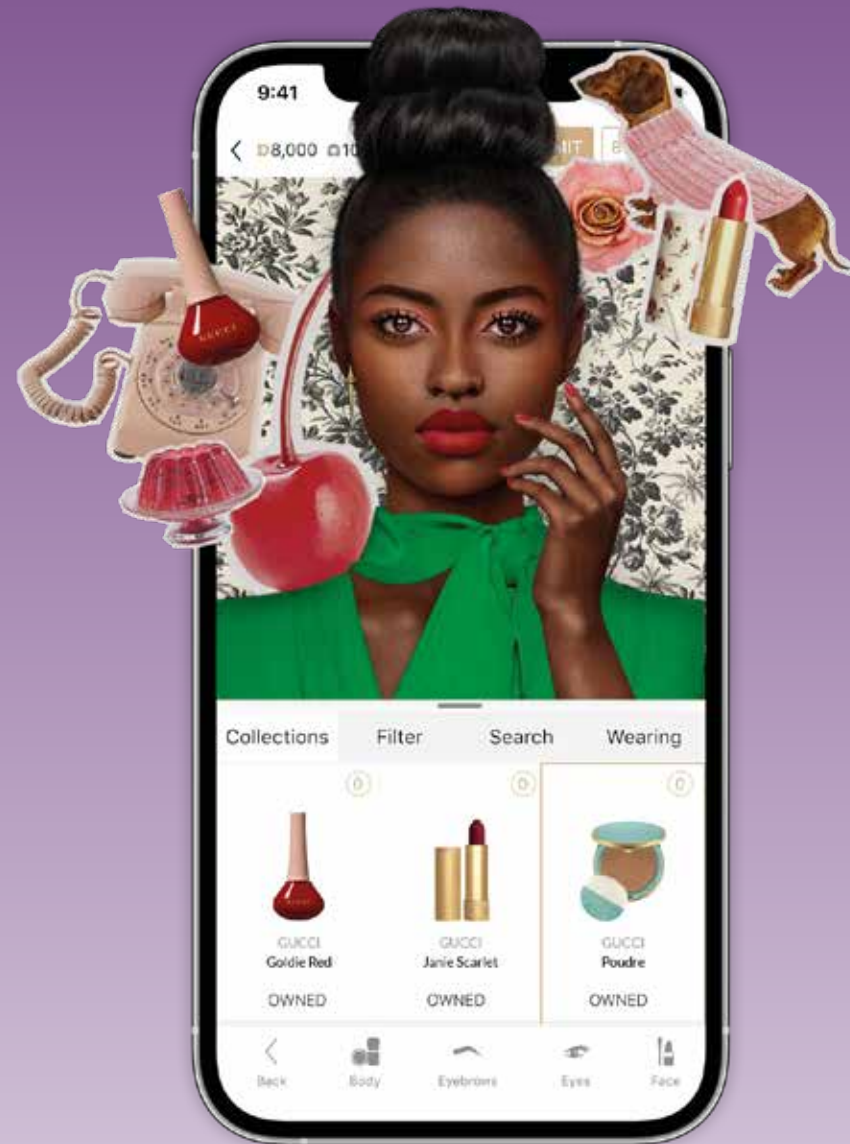
Launching a physical product purchase in tandem with collectible, exclusive NFTs incentivized avid Valdé fans to tune into the virtual launch. Each customer who purchased also became certified as an official member of the Valdé Beauty community through a lifetime membership to the Valdé NFT Collective, which offers VIP access, exclusive experiences, product perks, and access to talks led by founder Margarita Arriagada and celebrity makeup artists. Buyers also received an exclusive digital wearable—the ultimate VIP status symbol for future metaverse events.

### P&G Beauty

P&G Beauty unveiled BeautySPHERE, its virtual storytelling world, at the Consumer Electronic Show (CES) in January 2022. The digital experience is accessible via any browser and allows consumers to engage with the brand's responsible beauty platform. It offers livestream panels, beauty content and a gamified challenge, all of which highlight P&G Beauty's principles of sustainability, safety, transparency, quality and performance, and equality, inclusion and wellbeing.

### Why it's interesting

“BeautySPHERE doesn't end with CES but is the first step in offering education and engaging brand experiences,” the company states. The brandified beauty platform allows consumers from all over the world to connect with P&G Beauty's responsible and positive actions more intimately than they would by simply purchasing a product. CEO Alex Keith says that the platform was inspired by P&G Beauty's “ongoing commitment to find new and surprising ways for people to connect with our brands, products and values.”



## Drest

In October 2021, digital fashion app Drest launched two major beauty brands on its platform: Gucci Beauty and Nars Cosmetics. Gucci Beauty was the first brand to launch with Drest's beauty mode, allowing users to experiment with 29 virtual beauty products for a limited promotion. Nars Cosmetics and Drest unveiled a nine-day beauty campaign that allowed users to customize looks on avatar models using 30 virtual Nars beauty products, and save the looks and products on personalized mood boards.

## Why it's interesting

Beauty enthusiasts on the app can experiment, create, and express themselves digitally using brands and products they already know and love, naturally enhancing their relationship with brands with their digital habitats. Click-to-purchase links from the creativity mood boards and lookbooks allow customers to seamlessly purchase the physical products. These beauty brands are making moves to meet makeup gurus and beauty creatives where they are digitally, staying relevant in both their physical and virtual lifestyles.

## Fenty

Rihanna filed for a Fenty trademark in the metaverse in March 2022, potentially spanning her Savage X Fenty and Fenty Beauty brands. The reported trademark is for downloadable virtual goods, retail store and entertainment services, and mobile applications. Consumers may soon see virtual merchandise and Fenty beauty products in gaming, digital collectives, NFT art, and more based on the filing, as reported by *Bloomberg*.

## Why it's interesting

*Bloomberg* reported that Rihanna was discussing a potential IPO worth over \$3 billion, signaling a substantial investment in her brand reach in the virtual realm. Fenty Beauty and Savage X Fenty are known for their inclusive ranges of sizes and color swatches. Fenty is potentially bridging this diverse beauty and retail offering from physical storefronts into the metaverse, laying an inclusive foundation for beauty brands and beauty lovers in the growing digital beauty industry.









# NFT innovation





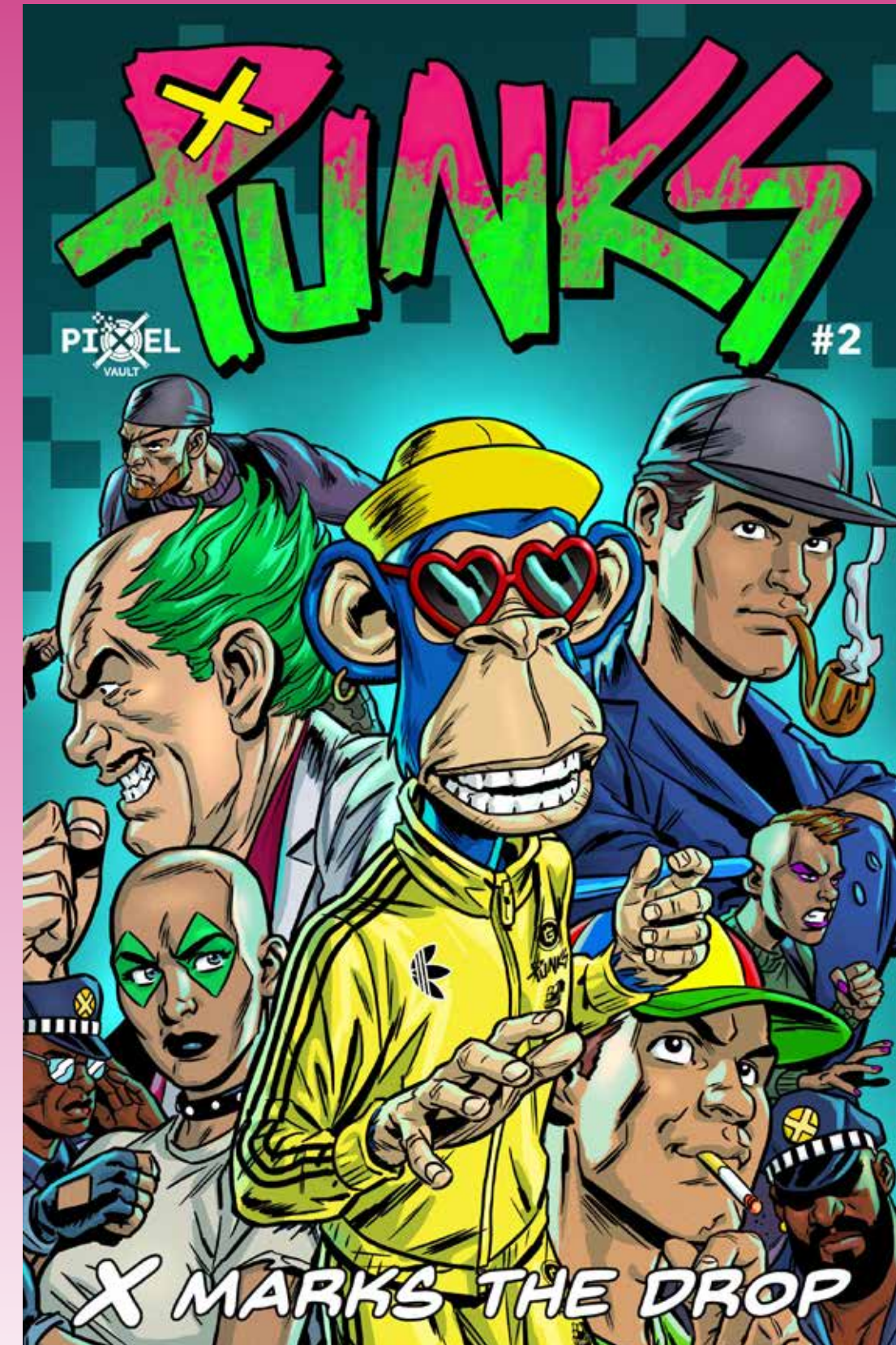
## Non-fungible tokens (NFTs) have seen a surge in interest over the past year—and have jumpstarted a nascent economy.

NFT sales hit \$25 billion in 2021, up from \$95 million in 2020, according to January 2022 estimates from DappRadar. The average price of a single NFT skyrocketed in 2021 from \$128 to nearly \$4,000 and hit an all-time high of nearly \$7,000 in January 2022—and average total daily sales were just over \$26 million as of March, according to industry data tracker NonFungible. Insurance broker and wealth management company IMA Financial even announced plans in March 2022 to sell NFT insurance in the metaverse, indicating the significant financial impact of NFT purchasing.

The craze has drawn significant brand attention, with household names from Coca-Cola to L'Oréal to Gucci releasing NFT collections. Adidas and Bored Ape Yacht Club released 30,000 NFTs in December 2021, selling out in a matter of hours and raking in \$22 million. Social media giants are also beginning to accommodate NFTs. Twitter now lets users showcase their NFTs by using them as profile pictures, and Mark Zuckerberg confirmed that NFTs are coming to Instagram at SXSW in March 2022.

The slew of branded NFTs and growing attention is a sign of what's to come, predicts Michael Bouhanna, co-head of digital art at Sotheby's. "I think we will see a mass adoption of the NFT this year," he tells Wunderman Thompson Intelligence.

While average prices were in decline at the time of writing, leaving many wondering whether the NFT bubble has burst, innovative new applications indicate that NFTs may be entering their next phase.





## Samsung

Samsung is turning its TVs into NFT platforms and displays, and announced plans at CES 2022 to integrate NFT viewing into its 2022 TV lineup. This will include an NFT TV platform, in partnership with Nifty Gateway, where creators can share their art and potential buyers can browse and preview NFTs, and where anyone can go to learn about an NFT's history and blockchain metadata. The screens will also include a smart calibration feature to optimize display settings for NFT viewing and an auto-rotation wall mount to switch between portrait and landscape displays.

### Why it's interesting

As the ranks of NFT collectors grow, Samsung is anticipating the need for digital NFT canvases—specialized screens to display digital art and virtual collectibles. The screens “will optimize the settings for a faithful rendering of the artist's intention,” according to the brand, turning owners' living rooms into NFT galleries.

## Gucci

SuperGucci by Gucci and Superplastic is a three-part series of ultra-limited NFTs launched in February 2022. The NFTs come with an exclusive eight-inch-tall white ceramic SuperGucci SuperJanky sculpture, hand-crafted by ceramicists in Italy and released in a limited collection of 500 pieces.

### Why it's interesting

SuperGucci is merging old-world craftsmanship and new-age artistry. By yoking digital and physical collectibles, the project offers a roadmap for how to translate luxury ownership into the metaverse.



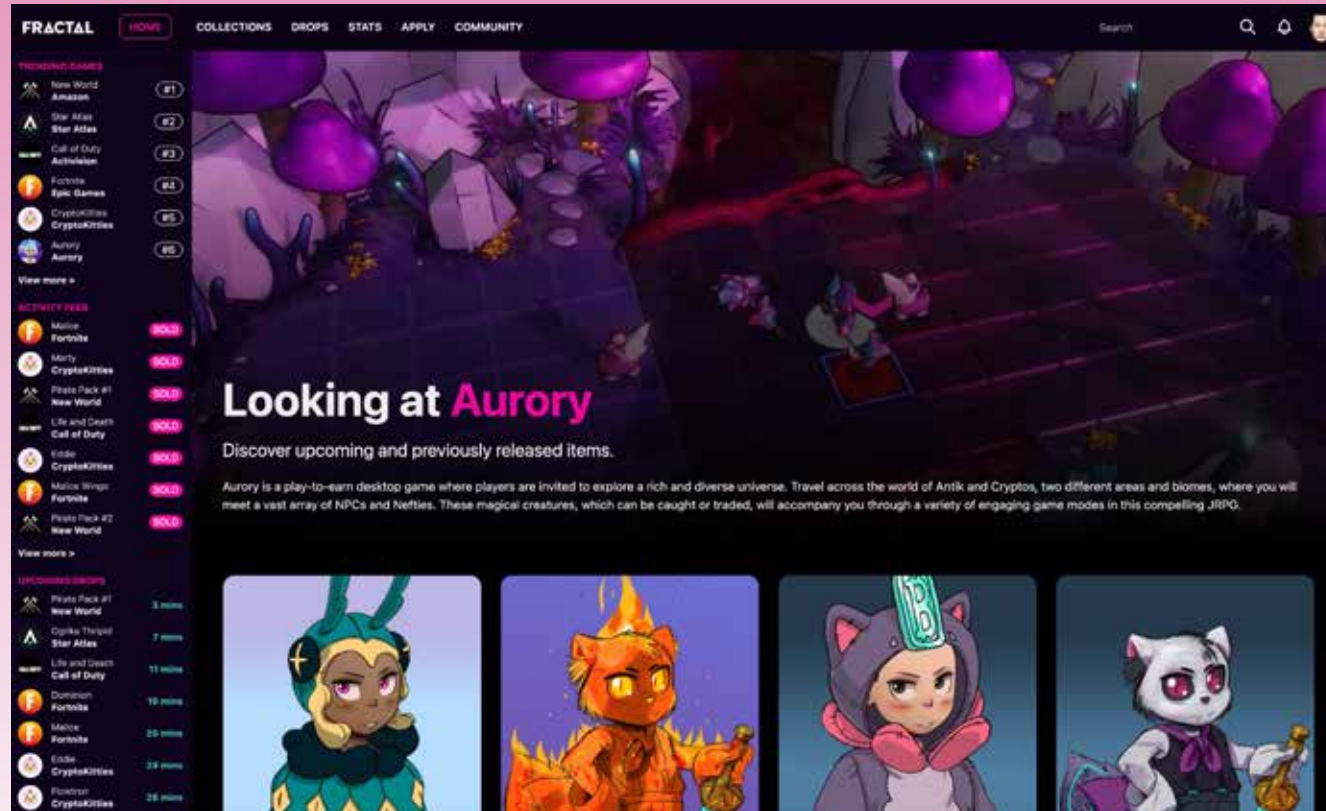
## Bulgari

Bulgari is turning an immersive art installation into an NFT. Bulgari launched *Serpenti Metamorphosis*, an artificial intelligence (AI) artwork created in partnership with digital artist Refik Anadol, in October 2021, when it was displayed in Milan before going on tour. *Serpenti Metamorphosis* will be minted into an NFT and auctioned, turning it into “an exclusive and unique artwork in the digital world,” explained Jean-Christophe Babin, CEO of the Bulgari Group.

### Why it's interesting

Bulgari is experimenting with a new formula for luxury souvenirs and bridging luxury experiences between the physical and digital worlds.





# NFT marketplaces

**Fractal** is a new gaming NFT marketplace from Twitch cofounder Justin Kan, launched in December 2021. The platform raised \$35 million in seed funding in April 2022.

**Associated Press (AP)** has launched an NFT photography marketplace, built by tech provider Xooa. The marketplace features work by AP photographers past and present, and will include Pulitzer Prize winners.

The **New York Stock Exchange** filed a trademark application in February 2022 for its own NFT marketplace.

**Yuga Labs**, the owner of Bored Ape Yacht Club, raised \$450 million at the end of March 2022 to build its own NFT marketplace and metaverse. The goal is to create “an interoperable world” that is “gamified” and “completely decentralized,” Wylie Aronow, a cofounder of Bored Ape Yacht Club who uses the pseudonym Gordon Goner, told the *Verge*.

**Sotheby's** launched its own NFT marketplace in October 2021—making it the first major auction house to do so. The launch brings Sotheby's “expertise and curation to the burgeoning world of art for the digitally native generation,” said Sotheby's managing director Sebastian Fahey.

## Why it's interesting

NFT marketplaces are opening the door to the future of ecommerce. “There’s always been lots of hype around NFTs, but what investors are now seeing is that it’s actually durable,” Justin Kan told *CoinDesk*. “Even if it’s a bear market, even if the prices might go down, the idea that people want to collect digital assets on the internet, that’s going to stay. Digital items in gaming, it’s like a new category of ecommerce, basically.”



## VIP NFTs

**Flyfish Club** will be an exclusive, members-only restaurant where patrons are granted access with the purchase of an NFT.

Grammy-nominated DJ **Steve Aoki** launched the **Aokiverse**, his own NFT membership platform and “tokenized social club” designed for NFT collectors, in January 2022. It gives exclusive access to virtual and in-person concerts, as well as early access to NFT releases, private events and apparel.

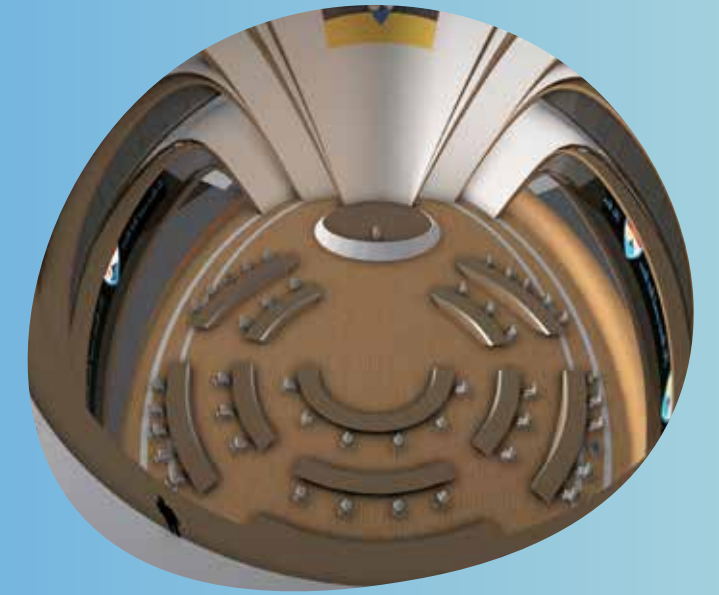
**Hennessy** released its first NFTs in January 2022 for \$226,450 each. Each purchase includes physical and digital ownership of the first and last bottles of a limited-edition Hennessy 8 from the LVMH-owned cognac house.

**Coachella** launched a collection of NFTs in February 2022. Purchase of the limited **Coachella Keys Collection**, totaling 10 NFTs, will earn the buyer a lifetime pass to the festival, as well as exclusive perks for the 2022 festival, including a celebrity chef dinner and front-row access to events.

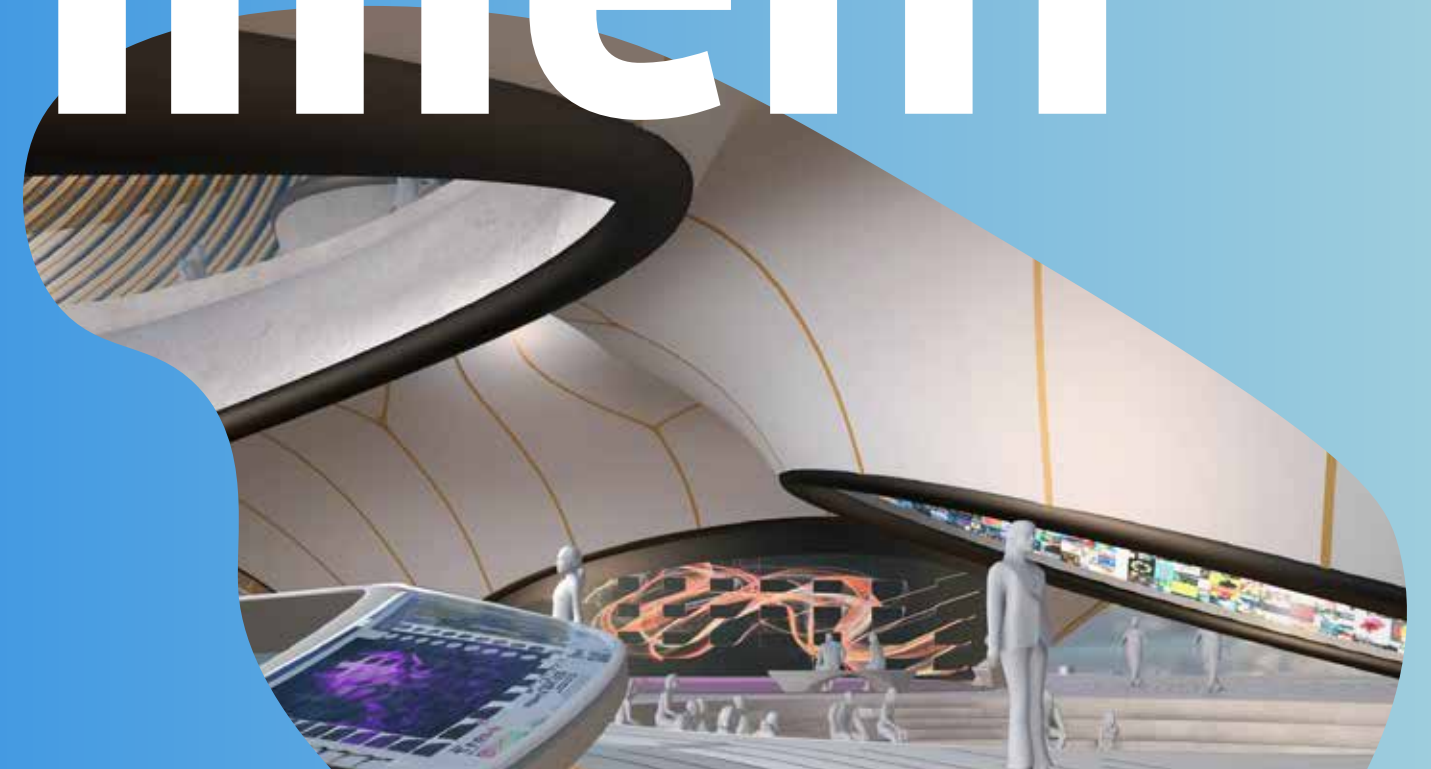
**Adidas** partnered with **Bored Ape Yacht Club**, **Gmoney** and **Punk Comics** to drop 30,000 NFTs that unlock access to exclusive merchandise events and community events.

### Why it's interesting

Are NFTs the new key to consumer loyalty? Brands are leveraging NFTs to unlock premier access, exclusive memberships and limited-edition products for the next era of digital loyalty and metaverse engagement.



# Society & government





## The metaverse is redefining what it means to connect, interact and communicate in society.

Fifty-three percent of respondents agree that the metaverse can bring people together, and 52% believe it has the potential to be more inclusive than the physical or offline world. 76% believe that the metaverse will impact governments. What are brands, companies and governments doing to integrate the virtual and physical worlds in a way that benefits both a functional, inclusive society and the environment?

### Governing in the metaverse

Governments around the world are taking their public services online, meeting constituents in the metaverse.

France brought politics into the metaverse during Emmanuel Macron's spring 2022 campaign for re-election as president. The "Macronverse"—a term coined by French journalists—went live on its own *Minecraft* server, where potential voters and the public can interact in a virtual town decorated with water fountains, cafés, a post office, police station, a cinema, and campaign posters highlighting Macron's past accomplishments and future ideals to the people of France. Macron's campaign included a pledge to make Europe's digital industry more independent of the United States through the launch of a "European metaverse," so this metacampaign potentially signals that future reality.

In February 2022, South Korea pledged \$187 million to develop a national metaverse project where it hopes the country's growing digital businesses and corporate industries will thrive. It also intends to expand the growth of cities, education and media through the platform. Seoul was the first major city to officially join the metaverse; Metaverse Seoul was launched on New Year's Eve

2021. This public service digital platform includes a virtual city hall, public gathering spaces, and digital community services. Seoul stated that the new realm will support the city's economic, educational and tourism industries.

At a major Chinese conference of lawmakers and politicians in March 2022, delegates from the National People's Congress and the Chinese People's Political Consultative Conference proposed that future development of the metaverse should be spearheaded by the central government. The previous February, the Chinese government had bulked up its industry body dedicated to developing the country's metaverse, adding additional firms and companies. These developments point to interest in a cooperative, interconnective, but regulated digital space.

The Biden administration is cracking down on cryptocurrency policies in the United States, the first time the government has weighed in on the topic formally, indicative of heightened attention to the growing industry.

Vít Jedlička, leader of the Free Republic of Liberland, a micronation situated between Croatia and Serbia, revealed a city in the metaverse, designed and

**76% of people believe that governments will be impacted by the metaverse.**







built by Zaha Hadid Architects. The Liberland Metaverse project portrays the nation as a virtual oasis in the metaverse.

In November 2022, Barbados announced plans to open the world's first metaverse embassy in Decentraland. Gabriel Abed, the country's ambassador to the United Arab Emirates, is leading the transition into the metaverse. Abed anticipates that digital presence will give the small island nation "diplomatic parity with larger nations, and a fully immersive way to showcase our culture and business opportunities." Significantly, a digital embassy is far cheaper than maintaining a physical presence.

### Representation in the metaverse

Fifty-nine percent of respondents say that brands need to work just as hard to create inclusive spaces in the metaverse as they do offline. Several companies already immersed in the metaverse are paying close attention to the realm's inclusive nature to ensure a diverse space that honors representation for users.

The digital design studio Daz 3D created 8,888 Non-Fungible People in January 2022. These avatars were devised to counteract the predominantly white male investor and developer demographic in the space. The collection is centered around female and non-binary avatars that can be imported into popular games and customized by consumers.

Other companies are focusing on representing users with disabilities: the Wheel Cards project by Door Labs consists of 10,000 Rollie digital cards, the first collection of wheelchair- and disability-related NFTs. Rollie card owners can take part in various earn-to-play blockchain wheelchair games on Wheel Games, which will eventually include basketball, racing and other sports.

In late April 2022, Degree hosted a marathon on Decentraland where users could create avatars with wheelchairs, prosthetics, and running blades as part of their pledge to work with partners to build a more inclusive metaverse. The virtual course even incorporated accessible architecture, such as ramps for avatars competing in wheelchairs.

These brands' active prioritization of inclusivity indicate a wider desire to build the metaverse upon a foundation of representation and diversification.

### Tech-cessibility in the metaverse

Several innovations at the January 2022 Consumer Electronic Show (CES) prioritized inclusive consideration of users' abilities.

Swiss company Biped introduced Biped.ai, an assistive device for users with vision impairments: this smart harness operates as an artificial intelligence (AI) copilot. Minimalist 3D cameras monitor the environment and warn the wearer of potential collisions using 3D sounds transmitted through bone conduction earphones. OrCam unveiled another innovation for visually impaired consumers: the OrCam MyEye Pro. The camera, winner of Engadget's Best of CES 2022 accessibility award, can be attached to any pair of glasses, and can read text, identify objects, and communicate with the wearer via Bluetooth headphones or a speaker.

For users with limited mobility, assistive tech division Tobii Dynavox partnered with Apple in November 2021 to develop a smart frame for iPads. The TD Pilot includes an eye-tracking sensor, wheelchair mount and enhanced speakers. These brands are reconsidering their products to ensure their offerings are both accessible and inclusive of their differently abled consumer base.



## Privacy and protection in the metaverse

Wunderman Thompson research reveals concerns about the fast-evolving metaverse: 63% are worried about privacy and data protection in the metaverse, and 51% are worried about bullying. Brands and governments alike are starting to take notice and take action to maintain a safe and secure environment as the metaverse develops.

In March 2022, recently appointed Microsoft security chief Charlie Bell called for security innovation in the metaverse, warning of the potential for new security breaches that the interconnected space may pose. “We have one chance at the start of this era to establish specific, core security principles that foster trust and peace of mind for metaverse experiences,” he said.

That same month, *Time* magazine reported that the Biden administration’s Executive Order on Ensuring Responsible Development of Digital Assets “tasks a variety of agencies with studying and planning around cryptocurrency policy in key areas like consumer protection, national security, and illicit finance,” indicating the government’s concern over security in digital spaces. In February 2022, TikTok announced a series of policy updates to protect the “security, integrity, availability, and reliability” of the platform following its first summons to a congressional hearing over platform safety.

What should brands consider to maintain adequate privacy practices in the metaverse? “Data privacy and data protection laws will apply in the metaverse as they do in the physical world,” Vicky Brown, WPP’s general counsel commercial and chief privacy officer, and Gareth Burkhill-Howarth, WPP’s global data protection officer, tell Wunderman Thompson Intelligence. “Current laws broadly define personal data as ‘any kind of information relating to an identified or identifiable person.’ Over the past five years we’ve seen the



concept of personal data evolve to include online identities, making the likes of IP addresses and cookie IDs personal data.”

Brown and Burkhill-Howarth advise brands “to make risk-based decisions about what participation looks like in the metaverse, what its ethical risk tolerance is, and whether it aligns with its existing policies and guidelines,” keeping children, safety, sustainability, DEI, brand safety, and unregulated assets at top of mind.

In some ways, the evolution of the interconnected Web3 is elevating security protocols in consumers’ day-to-day lives. For example, at 7 World Trade Center in New York City, employees swipe into work using a badge stored in their Apple wallets, using a new contactless entry system installed by the New York developer Silverstein Properties. In 25 Kent, an office building in Brooklyn, Rubenstein Partners installed an app and platform from building operation systems provider HqO to create a contactless entry system.

### Sustainability in the metaverse

61% of consumers agree brands need to be thinking about the environmental impact of the metaverse. Many companies are already attempting to launch their brands into the metaverse with sustainability in mind.

LVMH-owned beauty brand Guerlain began selling virtual bees as NFTs in April 2022, to support a rewilding project in the Vallée de la Millière nature reserve in France. A complement to its bee-inspired products, the collection includes collectible NFTs that span four levels of rarity and can be purchased through the Tezos blockchain, which claims to use less energy than other such systems.



Wunderman Thompson Sofia has collaborated with solutions platform MOVE.BG to create the first ministry in the metaverse: the Bulgarian Ministry for Climate Transition and Green Transformation, also known as the “ministry with no address.” The project was invented to inspire the Bulgarian community to take action after the country abstained in the vote to approve the European Climate Law, designed to reduce greenhouse emissions and work towards climate neutrality in June 2021. The virtual ministry’s offices, state documents and NFTs symbolize its proposed functions and also outline the actions Bulgaria must complete in order to achieve its green transition.

Formafantasma, an Amsterdam-based design studio, redesigned its website in February 2021 to be more energy efficient. Using smaller images, basic typefaces, and a logo created from standard Unicode symbols, the studio was able to decrease the energy needed to load the site, thus reducing its carbon emissions. In the same month, Volkswagen launched the Carbon-Neutral Net, a redesign of its Canadian website. By removing color and replacing photographs with mosaics, the project significantly lowered the amount of CO2 generated, making for a more sustainable browsing experience.







# Brand takeaways



# Solving for the Metaverse

**Wunderman Thompson Intelligence defines the metaverse as an extension of our lives enhanced by technology. But with daily life comes sensitive considerations around personal safety, identity, self-expression, inclusivity, accessibility and sustainability. These topics are still being tackled in the physical world and will need to be addressed in the virtual world as well. What are key areas of consideration for brands in the metaverse?**

Safety and privacy	Individual self-expression	Sustainability	Inclusivity and accessibility
<p>The top concern in the metaverse is privacy. Of those familiar with the metaverse, 69% are worried about privacy, and the same percentage are worried about data protection. If people are bringing their identities and values with them into the metaverse—along with their wallets—then the potential risks to data protection and privacy are that much greater. Brands entering the metaverse will need to construct extra measures to ensure privacy and protection for users.</p>	<p>One draw of the metaverse is its potential for creative self-expression: most people familiar with the metaverse (76%) want their avatar to express their creativity and individuality in ways that they can't in the physical or offline world. But virtual self-expression is only as good as the digital tools available. Brands will need to think creatively and comprehensively to help users create virtual faces and bodies that reflect a range of identities. How can brands and platforms help amplify—rather than stifle—their users' individuality and self-expression in the metaverse?</p>	<p>Digital sustainability is still a nascent concept for most people; only 38% of people familiar with the metaverse list sustainability as a concern in in the digital realm. A very substantial majority (71%), however, believe brands need to be thinking about the environmental impact of the metaverse. How can digital activations reach into the physical world to achieve sustainable or regenerative impact? How can brands help educate on and encourage sustainable digital habits?</p>	<p>Another draw of the metaverse is its potential for universal usability; 71% of people familiar with the metaverse believe brands need to work just as hard to create inclusive spaces in the metaverse as they do offline, and 62% say metaverse platforms have the ability to be more inclusive than the physical or offline world. Brands will need to consider users with a range of abilities when creating metaverse experiences.</p>



## Key takeaways

### Things to remember...

### What this means for brands...

**1** The metaverse is shifting digital engagement from passive consumption to active creation.

Expect to see an evolution from influencer economy to creator economy.

**2** The metaverse is inherently social—82% of people familiar with the metaverse say it's a place to socialize, and 64% believe it can bring people together.

The metaverse is not just another digital platform. It offers a space to foster community and connection, and can deepen brand engagement.

**3** 60% of those familiar with the metaverse say brands should be manufacturing and selling digital products alongside physical products.

The metaverse offers new business models and revenue streams. In the metaverse, brands will need to think beyond physical products.

**4** The metaverse is still in its earliest stages—we are watching it take shape in real time. Even so, 74% of those familiar with the metaverse believe it is the future.

Brands have an opportunity to define what the metaverse will be.

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## **ABOUT WUNDERMAN THOMPSON**

At Wunderman Thompson we exist to inspire growth for ambitious brands. Part creative agency, part consultancy and part technology company, our experts provide end-to-end capabilities at a global scale to deliver inspiration across the entire brand and customer experience.

For more information, please visit us at [www.wundermanthompson.com](http://www.wundermanthompson.com), subscribe to our newsletter, and follow Wunderman Thompson on our social channels via Twitter, Facebook, LinkedIn, and Instagram.

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## **ABOUT WUNDERMAN THOMPSON INTELLIGENCE**

Wunderman Thompson Intelligence is Wunderman Thompson’s futurism, research and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. It offers a suite of consultancy services, including bespoke research, presentations, co-branded reports and workshops. It is also active in innovation, partnering with brands to activate future trends within their framework and execute new products and concepts. The division is led by Emma Chiu and Marie Stafford, Global Directors of Wunderman Thompson Intelligence.

### **For more information visit:**

[wundermanthompson.com/expertise/intelligence](https://wundermanthompson.com/expertise/intelligence)

### **About the data in this report**

Unless otherwise stated, all findings in this report were collected by Wunderman Thompson Data as part of a survey on technology, digital spaces, and the metaverse. The quantitative survey was fielded in March 2022 among 3,005 respondents aged 16-65 in the United States, United Kingdom and China. When citing data from this report, Wunderman Thompson Data must be credited.



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