

REALITY CHECK

Consumer Perceptions of Augmented and Virtual Reality

Nisa Bayindir, Director of Global Insights



The world's largest ongoing study on digital consumer



**22 Million Online
Panel Members**



**45 Markets &
430k+ Surveys a Year**



**Representative of
2 Billion Internet Users**



**Quarterly Data
Collection**



**Immediate
Release**



**People not
Devices**

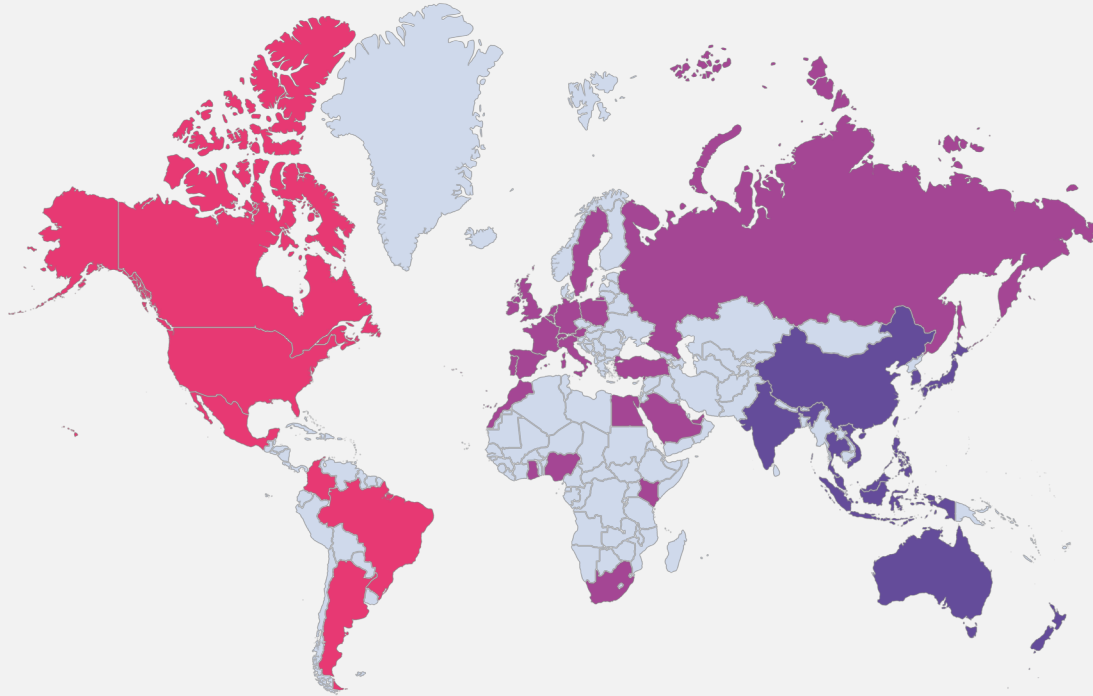


**35,000 Profiling
Data Points**



**Custom
Capabilities**

430,000+ surveys a year in 45 markets



AMERICAS

Argentina • Brazil • Canada
Mexico • USA

EMEA

Belgium • Egypt • France
Ghana • Germany • Ireland
Ireland • Italy • Kenya
Morocco • Netherlands
Nigeria • Poland • Portugal
Russia • Saudi Arabia
South Africa • Spain
Sweden • Turkey • UAE • UK

APAC

Australia • China • Hong Kong
India • Indonesia • Japan
New Zealand • Malaysia
Philippines • Singapore
South Korea • Taiwan
Thailand • Vietnam

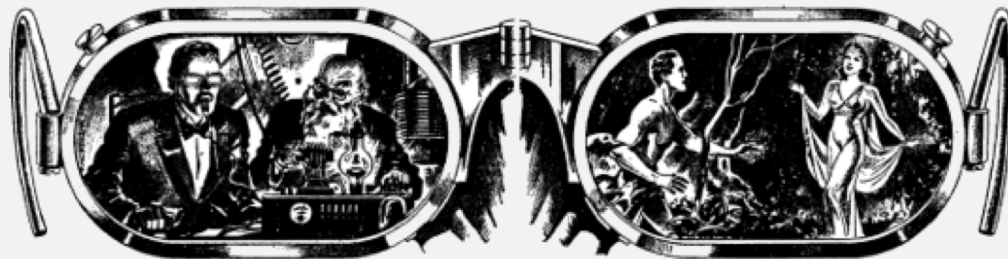
AR and VR 'fantasies' are at least 83 years old

PYGMALION'S SPECTACLES

By **STANLEY G. WEINBAUM**

Author of "The Black Flame," "A Martian Odyssey," etc.

© 1935 by Continental Publications, Inc.

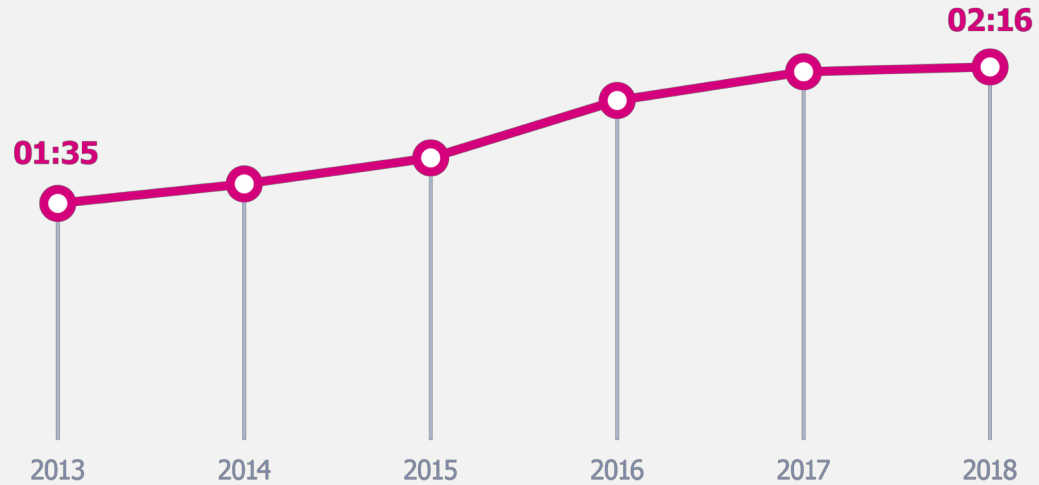


Unbelieving, still gripping the arms of their wicker chair, Dan was staring at a forest

We are social animals...

Daily Time Spent on **Social Media:**

GLOBAL AVERAGE

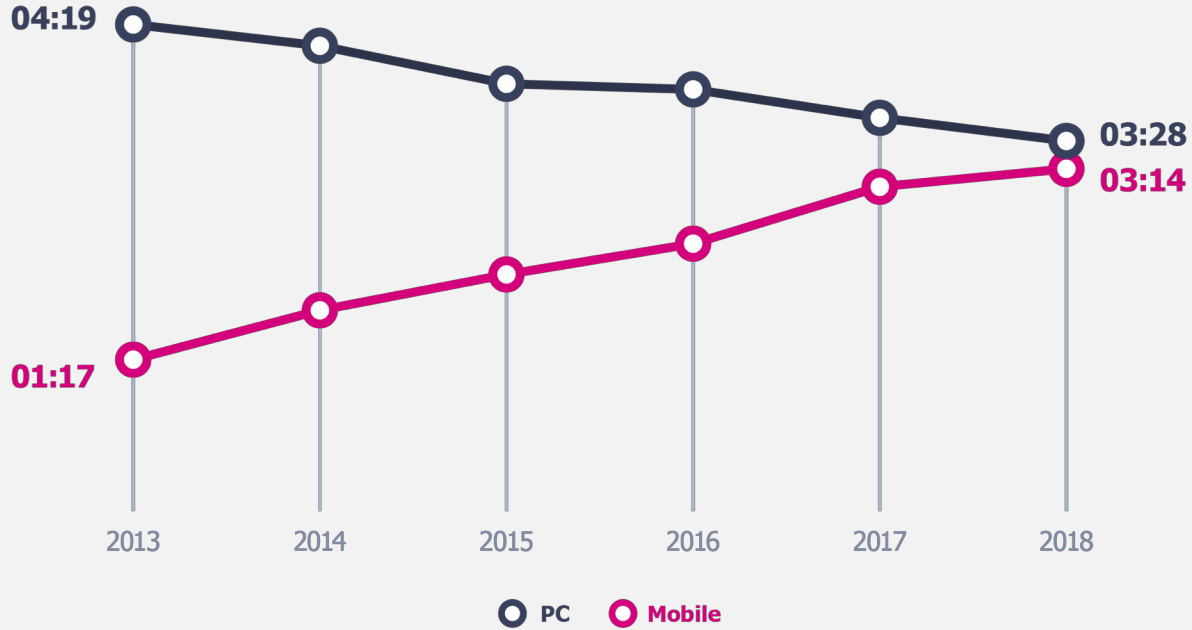


Social and visual

92% of human communication
is non-verbal

Daily Time Spent on PC vs. Mobile:

GLOBAL AVERAGE



“

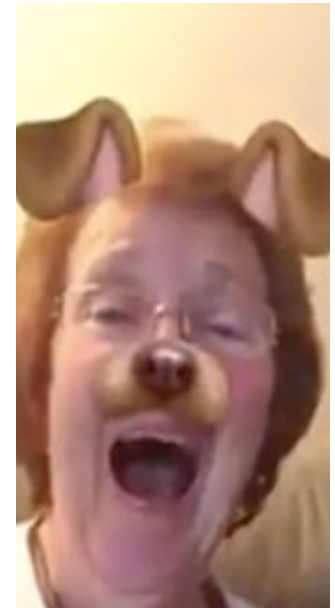
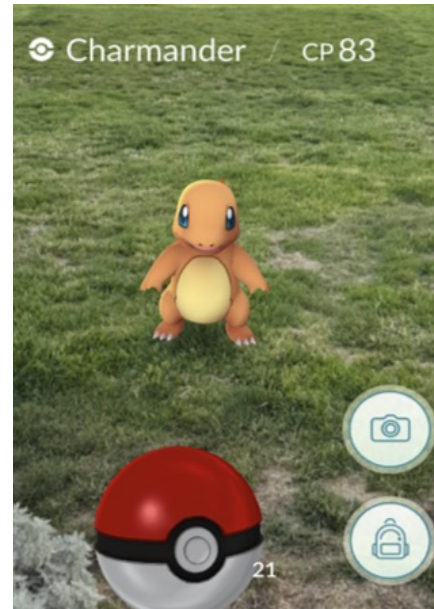
We are in the early stages of a tremendous platform shift, bigger than the shift from web to mobile. It's a shift in how humans will connect.

”

Andrew Bosworth – Facebook - VP of AR/VR

Fun. For a while.

Death by Pokémon GO: “The Economic and Human Cost of Using Apps While Driving”





Microsoft's AltspaceVR lets you build a virtual hangout

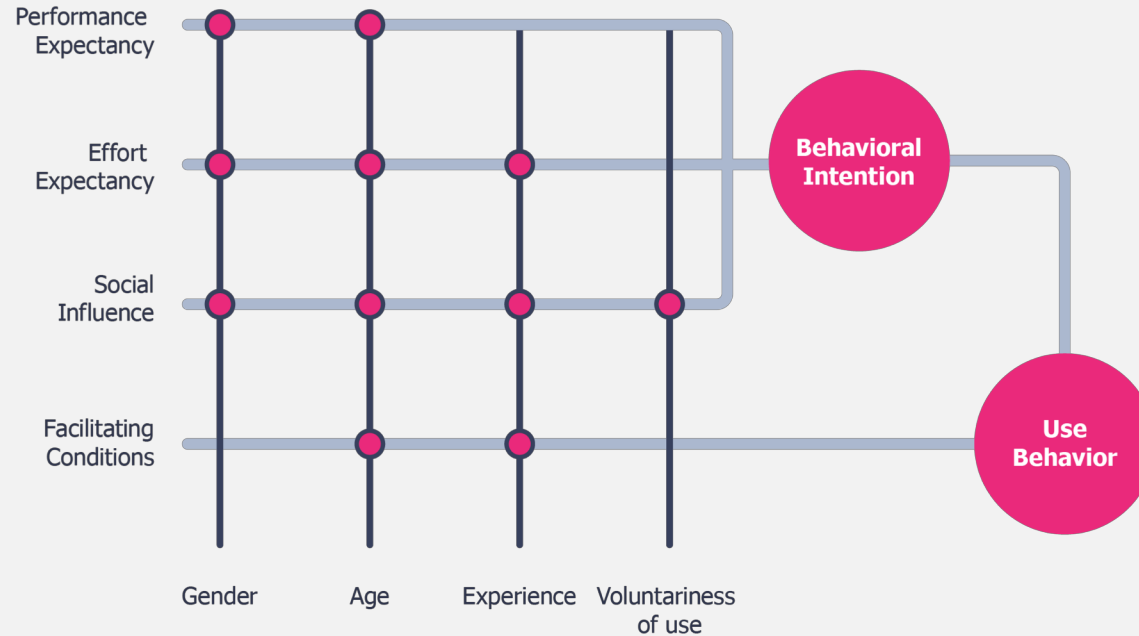
Do your own 3D and sound design and teleport to your friends' spaces.

Facebook updated its VR avatars to look more 'lifelike'

Facebook Spaces is getting more detailed versions of our virtual selves

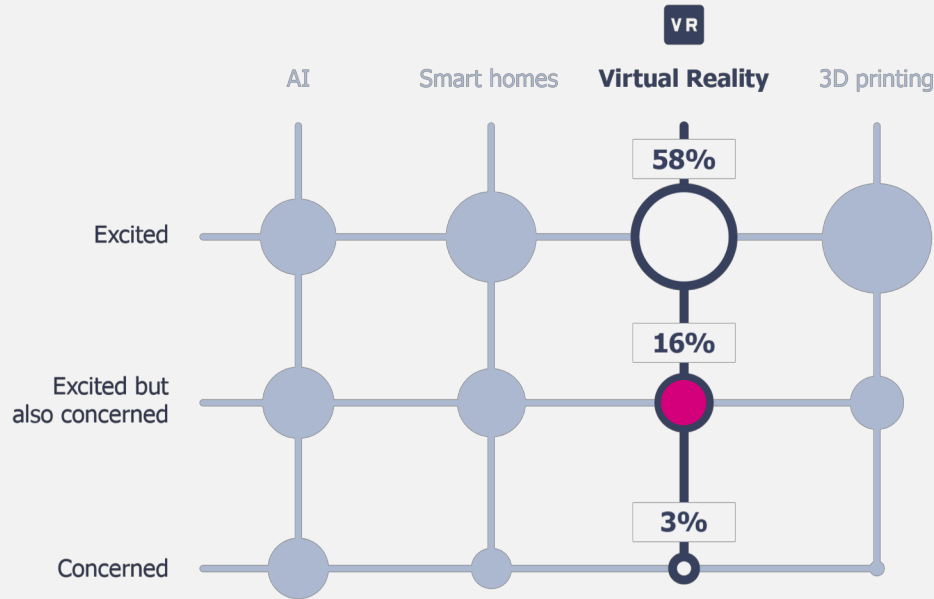


Moving parts of tech adoption



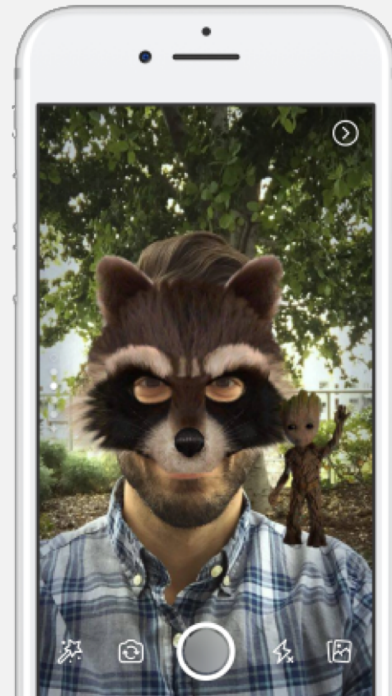
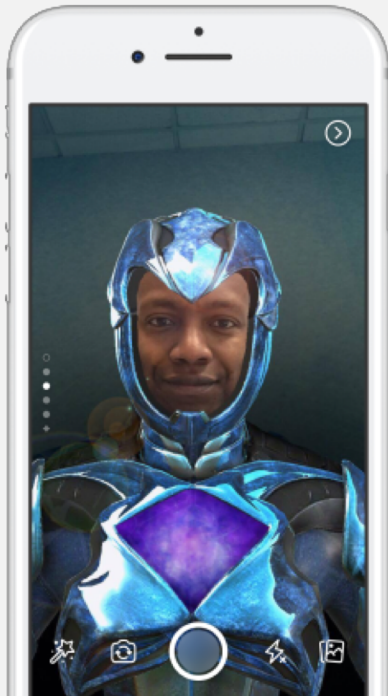
Fear of the unknown

...UNSEEN ...UNTRIED ...UNUSED?



Question: How do you feel about AI/smart homes/VR/3D printing? **Source:** GlobalWebIndex December 2018 **Base:** 3,458 internet users in the UK/U.S. aged 16-64

**Across the Facebook family of apps alone,
one billion stories are shared every day.**

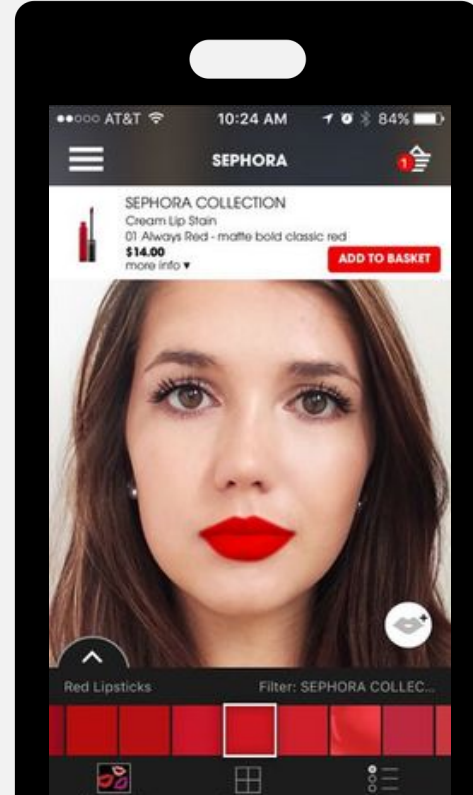


Embedded in our lives

12%

**Used AR without
knowing what it is**

Around 15% confused AR for VR



AR: Still something of an unknown despite usage

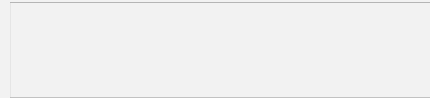
% who have heard of the following



VR

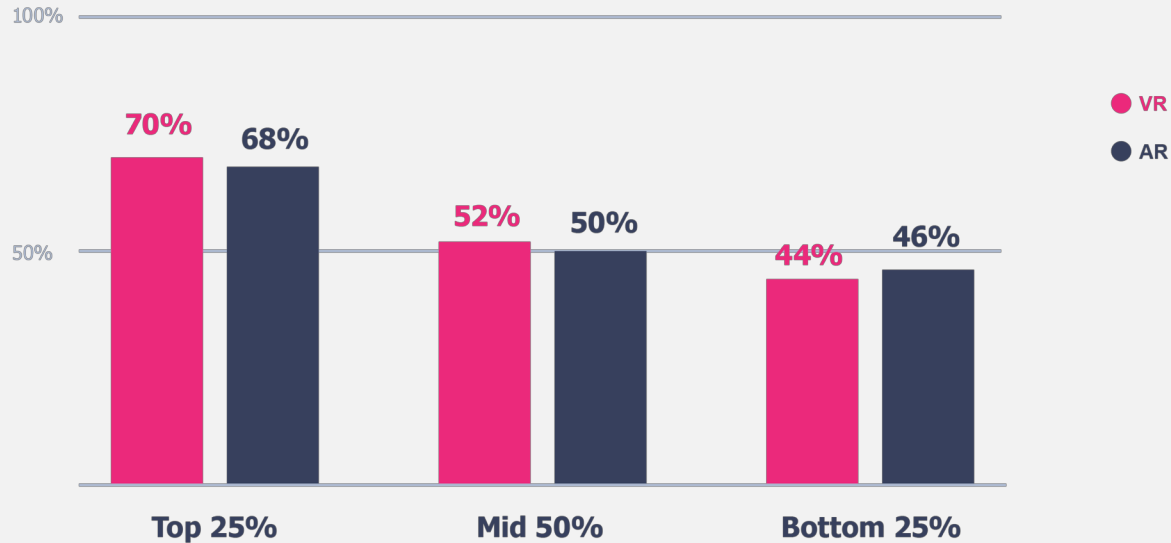


AR



Awareness and affluence connection

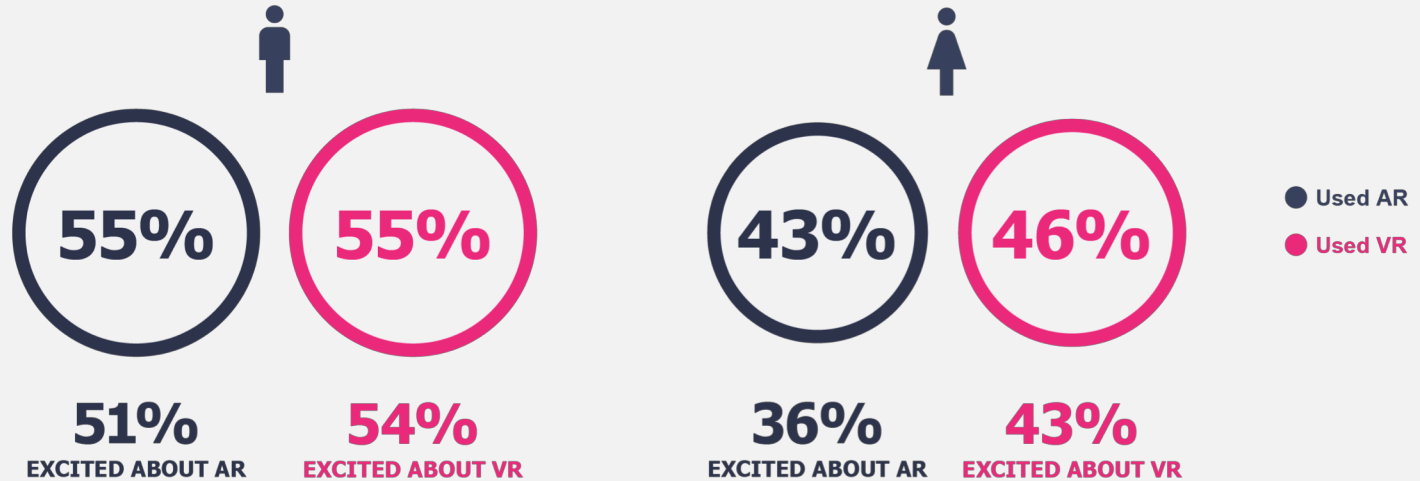
% in respective income brackets who have used the following technologies



Question: Had you heard of augmented reality/virtual reality before? // Yes, and I have used it / No, I didn't know that is what's called but I have used it
Source: GlobalWebIndex January 2019 **Base:** 1,254 internet users in the UK/U.S. aged 16-64

Inspiration in practice

Anticipation and usage grow concurrently

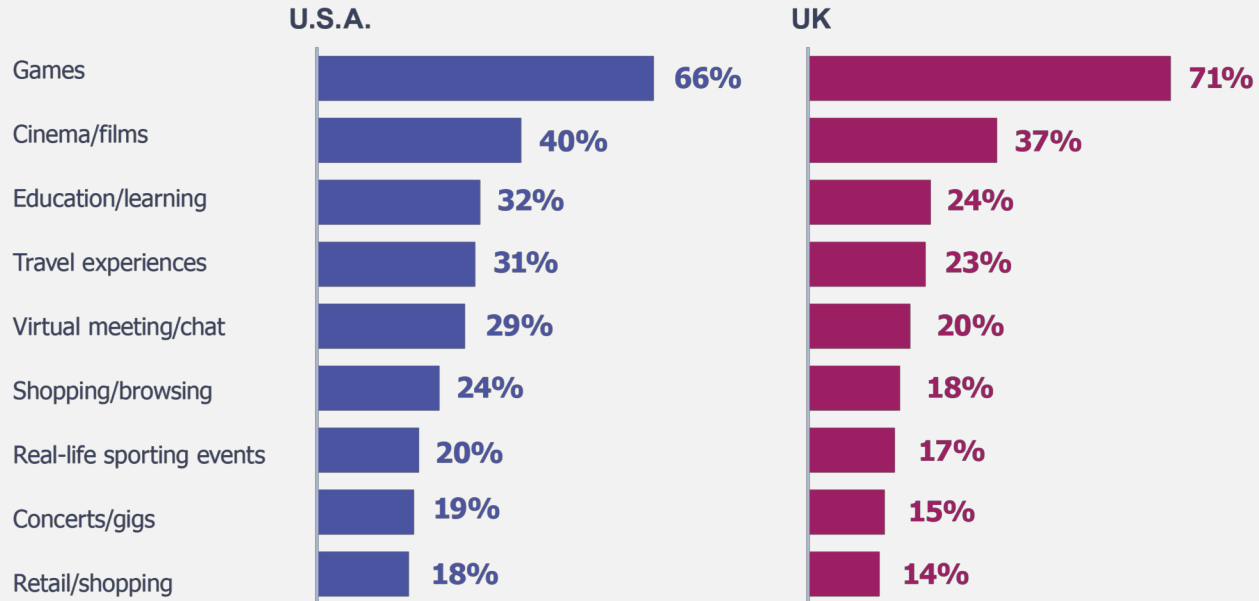


Question: Had you heard of augmented reality/virtual reality before? // Which of the below summarise your thoughts about AR/VR?

Source: GlobalWebIndex January 2019 **Base:** 2,672 internet users in the UK/U.S. aged 16-64

VR use cases match, adoption fat tails in the U.S.

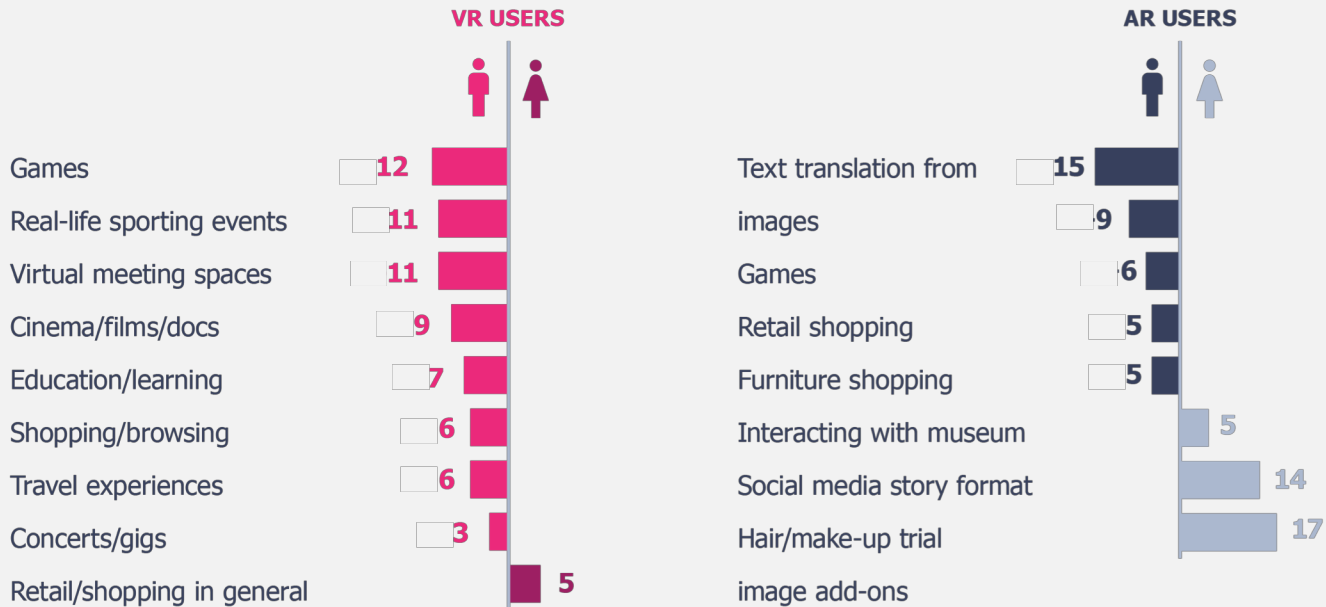
% of VR Users who have used the following VR applications



Question: Thinking of virtual reality, which of the below have you used that utilises this technology?

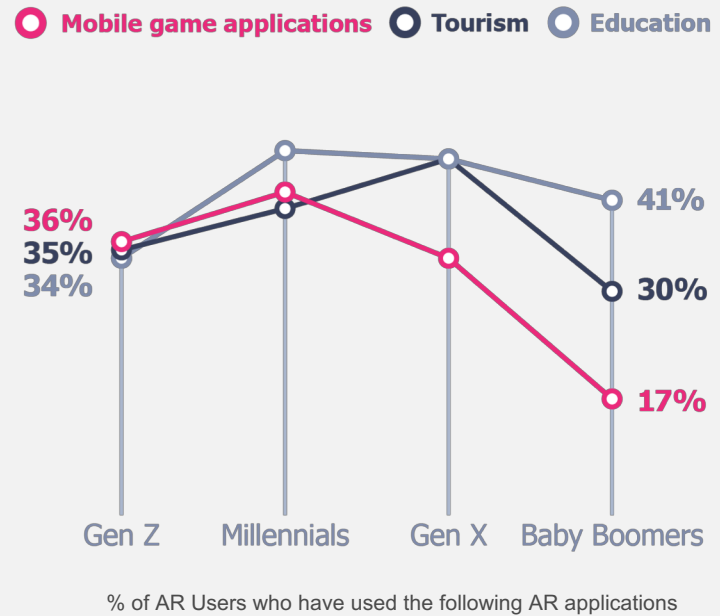
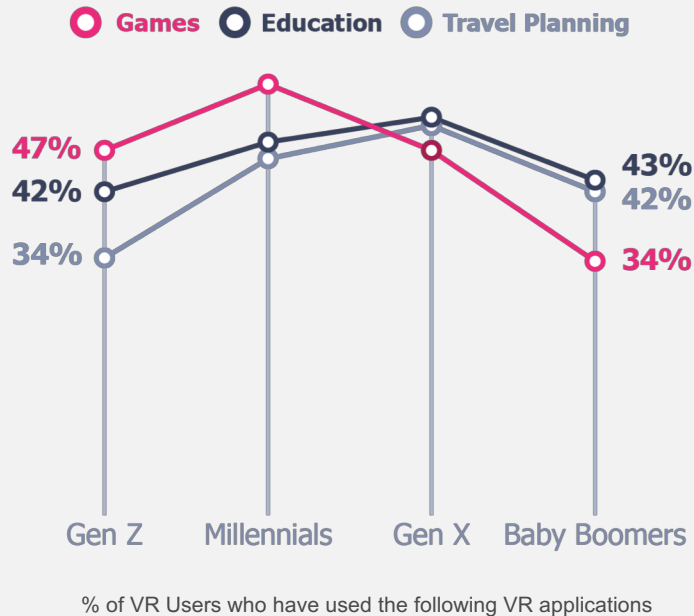
Source: GlobalWebIndex January 2019 **Base:** 1.254 internet users in the UK/U.S. aged 16-64

Utility and entertainment vs self expression



Non-linear value exchange

'Niche' purpose will help reach beyond early adopters

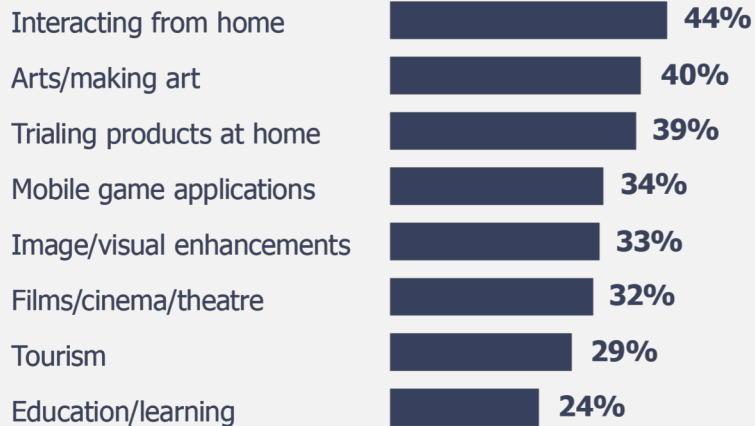


Question: Thinking of virtual and augmented reality, which of the below have you used that utilises this technology?

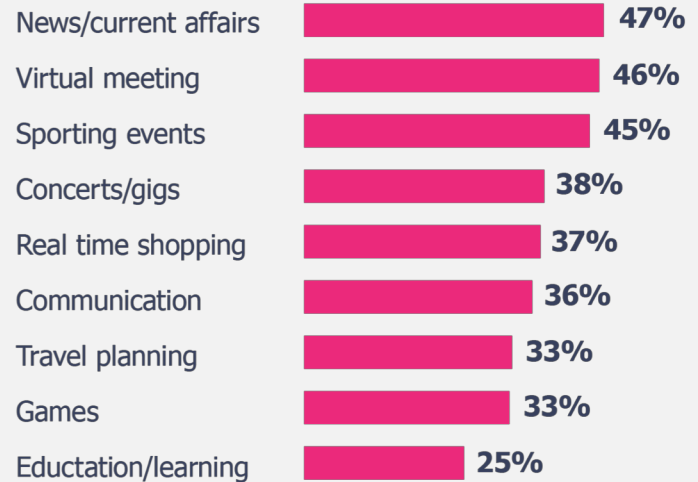
Source: GlobalWebIndex January 2019 Base: 1,254/1,313 internet users aged 16-64

'Real-istic' and 'self-ish' expectations

AR beginning to fuel appetite



VR has a tough task at hand



Stretching imagination



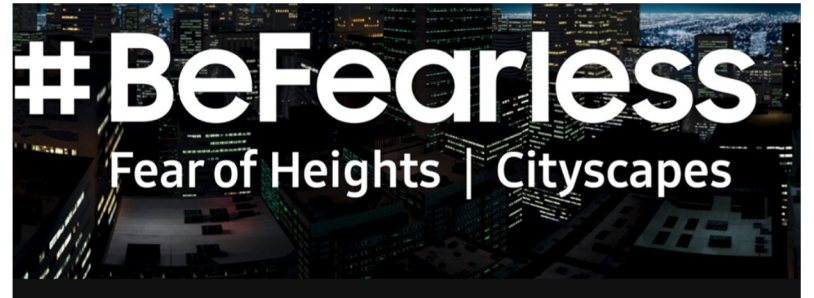
**Only 1 in 5 is
apprehensive
about AR or VR
technology...**

Follow consumer's self

Determine your stance beyond entertainment or gimmicks, be one step ahead of the hype.

Consumer experience deal-makers:

- Educate
- Enhance
- Immerse
- Extend



Thank you

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