The following report is a deep dive into how Snapchatters are using AR in Norway based on the Snap Consumer AR Global Report.

For a more comprehensive market view, please read the Snap Consumer AR Global Report.

Snap
Consumer
AR
Norway
Report
2021
AR is a critical tool for brands to stand out and deliver customer value and confidence.

Introduction
AR is the next form of mobile engagement, elevating the consumer experience and setting new expectations for digital engagement.

AR’s Impact on Brands
AR is a critical tool for brands to stand out and deliver customer value and confidence.

AR is Evolving Fast
AR cannot be ignored as the new, rapidly-growing consumer experience that will soon be everywhere, all the time.

AR is Here Today and Here to Stay
AR is already here, widely recognized as both fun and useful and driving fast adoption and growth.

Conclusion
There is an imperative to meet consumer’s AR demand, and now is the time to act for brands, platforms, and developers.
Introduction
Key Takeaways

AR adoption is tracking with the mobile usage boom - by 2025, over 75% of Norway’s population and almost all people who use social / communication apps will be frequent AR users.¹

73% of people successfully identify AR when they see it², but when talking about it, they have a hard time defining or describing what it is.

73% of Snapchatters in Norway and across generations use AR to have fun; the majority are discovering AR through social / communications apps.³

AR is generally seen as a “toy”, but 74% of people expect and desire to use it as a practical “tool” in their everyday lives.⁴

Interacting with products that have AR experiences leads to a 94% higher conversion rate.⁵

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¹ See additional methodology details in appendix.
² 2021 Global Deloitte Digital Study commissioned by Snap Inc.
³ Base = Snapchatters (n=375)
⁴ Base = Aggregate (n=583)
⁵ Harvard Business Review, "How AR is Redeathing Retail in the Pandemic"
There is something really unique happening right now – an incredible number of hobbyists and professionals are using AR. Downloading tools across the Snap AR platform. They’re taking time to learn, they’re curious.”

AR is growing

By 2025, over 75% of the Norway's population* and almost all people who use social / communication apps will be frequent AR users.¹

Frequent AR Consumers

Based on people ages 13-69 who use social / communication apps

1: See additional methodology details in appendix

*Global population includes people ages 13-69 (based on UN World Population Prospects 2019)

Note: 2021 AR Consumers based on people who use AR weekly or daily from 2021 Global Deloitte Digital Study commissioned by Snap Inc.

2022 to 2025 forecasted to line up, 2020/2021 growth rate of smartphone usage since AR is in the 'Toy-phase of adoption' of new tech at scale. This timeline took place with mobile phones, one year after Rothschild was when games like 'snake' started being available (e.g., 1997 Nokia 6110 device released, 1999 emojis were invented, 2000 Nokia 3310 launched, and the first commercially available camera phone launched in Japan).

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Eitan Pilipski
SVP Camera Platform
Snap Inc.
Younger generations and Snapchatters are driving AR growth

Age Differences

Younger people are 93% more likely to use AR,¹ and they are 42% more likely to believe AR is important in their lives.²

But, AR is not just for Gen Z; Millennials and Gen X show the highest affinity for AR.³

Snapchatters use AR to express themselves better (+85%), enhance creativity (+69%), and make communication easier (+52%), more than Non-Snapchatters.⁴

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1. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
2. Base: Age 13-17 (n=49), Age 18+ (n=185)
3. Base: Gen Z (n=1,261), Millennials (n=1,632), Gen X (n=1,107)
4. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
5. Base: Snapchatters (n=317)
6. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
7. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
“As AR evolves, it will revolutionize our lives and will become as significant of a technology shift as the web or mobile was to society, changing how we view and interact with the world around us.”

Allan Cook
Digital Reality Business Leader
Deloitte Digital
AR’s Impact on Brands
A lot of people are using AR to make purchase decisions... and plan to keep doing so

There are

100 million consumers

shopping with AR online and in-stores.¹

95% of Snapchatters agree they’ll use AR the same or more when shopping next year.²

¹: Gartner Press Release
²: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
AR captures consumer attention

AR delivers almost 2x the levels of visual attention compared to their non-AR equivalent, leading to improved memories and more powerful responses from consumers.¹

Snapchatters who frequently use AR with their family and friends are 35% more likely to pay attention to a brand.²

1. Zappar, Article, "How augmented reality affects the brain"
2. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
Brands and people connect better with AR experiences

Brands are 31% more likely to be considered if they have a branded AR experience.

Snapchatters who have interacted with a brand’s AR experience are 21% more likely to share it with friends and family.

1. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
2. Base = Snapchatters (n=107)

Q: Sometimes brands will create AR experiences through an app camera (e.g., a big movie company makes an AR experience where the heroes of a movie are fighting next to you, or a restaurant provides you a lens/filter/effect that turns you into a hamburger). What impact, if any, does interacting with that AR experience have on your perception of that brand?
AR builds consumer confidence

41% of Snapchatter shoppers agree that AR gives them more confidence about product quality.¹

Over half of people want to use AR technology to assess products, allowing for a risk free, “try-before you buy”, experience.²

Nearly 3 in 4 consumers say they're willing to pay more for a product that promises the total transparency that AR can provide.³

Returns are a $550 billion problem, which AR can help fix. AR-guided purchases led to a 25% decrease in returns.⁴

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=212)
²: NielsenIQ Analysis, Augmented retail: The new consumer reality
³: 2016 Label Insight Transparency ROI Study via Inc.
⁴: AR Insider Article, “Does AR Really Reduce eCommerce Returns?”
The results are in 🥂
AR interactions drive conversion

“...The conversion rates that we’ve seen have surprised us, as a result we’re doubling-down on AR experiences to drive eCommerce.”

Robert Triefus
EVP of Brand & Customer Engagement
Gucci

94%

higher conversion rate, as individuals can better assess them and feel connected with brands.

Snapchatters who have interacted with a brand’s AR experience are 17% more likely to purchase products through the brand’s website.

Snap Inc.
AR connections drive revenue

Consumers who view AR as a social activity are **22% more likely** to purchase products from the brand.¹

- Snapchatters are **52% more likely** than Non-Snapchatters to use AR to connect with others.²
- Snapchatters share AR photos and videos with friends and/or family **95% more** than Non-Snapchatters.³

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc.
² Base = Snapchatters (n=206), Non-Snapchatters (n=72)
³ Base = Snapchatters (n=250), Non-Snapchatters (n=67)
AR is Evolving Fast
Almost 3 Million AR photos and/or videos are taken daily by consumers.

AR use will grow with an increase in awareness and access to AR experiences and content.

On Snapchat, there are 500 million minutes of AR playtime per day on average.²

AR Photos / Videos Per Day¹

Generational Breakout of Daily AR Photos / Videos Created

2021-2025 CAGR of AR Photos / Videos per Day.¹

+40%
AR is Here
Today and
Here to Stay
Where do Snapchatters use AR most today?

77% of Snapchatters use AR primarily in their homes.

Snapchatters predominantly use AR at home and do so for a wide range of uses.

What are Snapchatters using AR for at home?

- **79%** Communication
- **41%** Media & Entertainment
- **42%** Gaming
- **23%** Shopping

Today’s use cases most align with activities you would do at home, and 94% of Snapchatters say they will use AR at home more than last year.

Note: Across all 15 markets, the 2021 Global Deloitte Digital Study commissioned by Snap Inc. ran from February 23, 2021 to April 5, 2021. Since the survey was conducted during the COVID-19 pandemic, primary use of AR in consumers’ homes may be higher than normal today. Use cases are ranked from most to least used at home.

**Q:** Where do you typically use AR? Please rank the locations from where you use AR the most to the least. | **A:** At Home Rank 1st

**Q:** How often do you use AR for any of the following reasons? | **A:** Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month

**Q:** How will your total AR usage compare to last year? – At home | **A:** I will use AR more than last year, I will use AR about the same amount as last year

1. Base = Snapchatters (n=388)
2. Base = Snapchatters at home – Communication (n=304), M&E (n=160), Gaming (n=162), Shopping (n=91)
3. Base = Snapchatters (n=484)
How are Snapchatters learning about AR?

85%

learn about AR from social / communication channels and networking.¹

Snapchatters who use AR frequently are more likely to have over 40% of their friends and family using AR.²

¹ 2020 Global Deloitte Digital Study commissioned by Snap Inc.
   Base = Snapchatters (n=439)
   Q: Where did you first discover AR content? | A: I saw people I know using it on social media, communication, and camera apps, I saw it in an advertisement on a social media, communication, and camera app, I stumbled across it while exploring viral content on social media, communication, and camera apps, I saw celebrities / influencers use it on social media, communication, and camera apps

² Base = Snapchatters who use AR all the time (n=87), Snapchatters who have used AR before (n=151)
   Q: How familiar are you with AR? | A: I use AR all the time, I have used AR before
   Q: How many of your friends and family do you think use AR today? | A: 40-60%, 60-80%, Over 80%
Why do they use AR?

**TECH:** OSMOSIS  “I didn’t even realize I was using it”

**TOY:** JOY  “I want to have fun and connect with friends”

**TOOL:** UTILITY  “I need to and it’s useful”

**TOTALITY:** UBIQUITY  “It’s everywhere and commonplace”
What are Snapchatters using AR for, today?

Communication
80% use¹

Gaming
45% use²

Media
44% use³

Shopping
28% use⁴

45% to be more creative⁵

38% to make gameplay more interactive⁶

49% to make what they are watching more enjoyable⁷

42% to try products out⁸

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
²: Base = Snapchatters (n=232)
³: Base = Snapchatters (n=229)
⁴: Base = Snapchatters (n=145)
⁵: Base = Snapchatters (n=133)
⁶: Base = Snapchatters (n=80)
⁷: Base = Snapchatters (n=104)
⁸: Base = Snapchatters (n=85)
What are Snapchatter shoppers using AR for, today?¹

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<tr>
<th>Category</th>
<th>AR Usage Percentage</th>
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<td>Beauty and Wellness</td>
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<td>Automotive</td>
<td>37%</td>
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<tr>
<td>Restaurant &amp; Food Delivery</td>
<td>37%</td>
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</tbody>
</table>

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base: Retail (N=135), Beauty and Wellness (N=94), Household goods (N=78), Telecommunications (N=89), Restaurants / food delivery (N=76), Entertainment (N=96), Home Décor (N=124), Automotive (N=74), Travel (N=94).
What are Snapchatter shoppers using AR for, today?¹

AR is a natural extension of the shopping experience, aiding in decision making

- 24% discovered it organically, as part of browsing or shopping¹
- 47% of shoppers are likely to use AR when they come across it²
- 42% help shoppers decide what to buy³

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
Base = Snapchatters (n=50)
Q: How have you found AR while browsing and/or shopping?
²: Base = Snapchatters (n=94)
Q: If you come across AR while browsing and/or shopping, how likely are you to try it? A. Somewhat/Very Likely
³: Base = Snapchatters (n=85)
Q: How does AR impact your browsing and/or shopping experience?
3 in 4 Snapchatters believe that AR will be even more important in their lives in the next 5 years.

Next year, Snapchatters plan on using AR more in 4 key growth areas.

- **Shopping**: 37%
- **Media**: 32%
- **Gaming**: 25%
- **Communications**: 25%

58% want to readily view information about an item or product as soon as it’s scanned with the phone camera.

21% want to readily view information about an item or product as soon as it’s scanned with the phone camera.

29% want to project their AR avatar into their favorite games, media & entertainment.

28% want to customize environments to their own imagination and share with others.
Utility is a primary driver for Snapchatters’ future AR usage

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.

Q: Why use AR

- Improve Productivity
  - Instructions: 57%
  - Learn something new: 32%
- Wellness
  - TV & Sports: 40%
- Improve Shopping
  - Navigation: 40%
- TV & Sports
  - Improve Shopping: 64%
- Instructions
  - Learn something new: 171%
- TV & Sports
  - Navigation: 34%
- Improve Productivity
  - Wellness: 142%
Consumers are becoming creators

Everyday consumers have more access to technology tools that enable them to be creators of digital content.

AR is a creative vehicle

60% believe AR allows them to be more creative.¹

40% believe they are AR creators in their everyday lives.²

Snapchatters are 1.2x as likely to be AR creators.³

43% vs. 36% have used tools to create AR.

Snapchatters

Non-Snapchatters

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc.
² Base = Aggregate (n=475)
³ Q: Have you ever used tools (e.g. Snapchat Lens Studio, Facebook for Developers/Spark AR, Instagram for Developers, TikTok for Developers) to create your own AR filters/lenses/effects? | A: Yes

27% Snapchatters have used tools to create AR.

36% Non-Snapchatters have used tools to create AR.

Snapchatters are 1.2x as likely to be AR creators.
Conclusion

Consumers continuously expect more personalized and engaging experiences that enable them to interact with the world. **AR is delivering that to consumers, today, but there remains untapped potential for so much more.**

Brands know the consumer appetite for AR is already here – consumers are far more likely to pay attention to brands using AR. **There is a content imperative for brands to meet consumers AR demand, and now is the time to meet this demand. Brands that meet the demand for AR experiences may be more likely to gain market share in the future.**

The convergence of use cases and the networking effects is expediting AR adoption. But to unlock AR’s potential, **brands, developers, and platforms need to work together to accelerate content development and grow the AR ecosystem.**
Thank you
Appendix
Consumers are redefining the digital experience by using AR.

Augmented Reality (AR) is the next form of mobile engagement that is exciting consumers, driving an enhanced engagement with brands, elevating consumer experiences and increasing brand revenues.
Report Methodology

Research Overview
Norway Report, Quantitative Online Survey
• 20-minute online survey among 15,000 international respondents
• Survey in field from February 23, 2021 – April 5, 2021

Alignment with Interdisciplinary Experts
• Experts within the AR industry participated in in-depth interviews to provide context for survey findings and contribute guidance on the future of AR in society.

Respondent Qualification
• n=1000 per market
  • Ages 13-50
  • 500 Snapchatters who use Snapchat at least once daily, split evenly amongst age groups 13-17, 18-24, and 25-50
  • To ensure a representative read on Snapchatters, cell weighting based on nested gender and age were applied to each country to correct for demographic imbalances due to set sampling size.
  • 500 Non-Snapchatters, who do not have Snapchat downloaded/have never heard of Snapchat, minimum of N=100 in all three age groups
• Markets: Australia, Canada, France, Germany, India, Japan, Malaysia, Mexico, The Netherlands, Norway, Saudi Arabia, Sweden, United Arab Emirates, United States, United Kingdom

Local Market Additions and Exceptions
• US: Ethnicity quota (maximum 65% white respondents, maintained only for Snapchatters; Non-Snapchatters sample should be roughly nationally representative)
• KSA and UAE: Representative expat / citizen quotas (88% expat in UAE; 30% expat in KSA for both Snapchatters and Non-Snapchatters).
• Norway: Sample recruited for n=1000 to be representative of social media and communication app users in that market, with a skew on ages reflective of other markets (evenly distributed across 13-17, 18-24, and 25-50)
• Japan: Sample recruited for n=1000 to be representative of smartphone users in that market, with a skew on ages reflective of other markets (evenly distributed across 13-17, 18-24, and 25-50)
Frequent AR Users Methodology

### 2021 Baseline

**Frequent AR Users**
- People who use AR weekly or daily based on responses to 2021 Global Deloitte Digital Study commissioned by Snap Inc. and extrapolated to population

**Population Base**
- 2021 Global Population Base: People ages 13-69 = 5.61B worldwide in 2020
- 2021 Social and Communications App Population Base: Global Population x Social Media Penetration Rate (48% in 2021) = 2.71B

**AR Adoption Rate**
- AR Adoption Rate of Total Population
- AR Adoption Rate of Social and Comms App Population

Note: Assumes no increase or decrease in population. Base from 2021 stays same across five years

### 2022-2025 Forecast

**2000 Growth Rate of Smartphone Users**
- Note: 2021 AR Users is at 1999 smartphone user’s adoption level since AR is in the Toy-phase of adoption; if we look at where this transition took place with mobile phones, one can argue that this was when games like ‘snake’ started being available (e.g., 1997: Nokia 6110 device released, 1999: emojis were invented, 2000: Nokia 3310 launched, and the first commercially available camera phone launched in Japan)

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1. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
2. Base = Aggregate (n=792)
3. Note: Boomers assumed similar behavior to Gen X since Boomers were not part of survey group
5. Statista Global Social Network Penetration 2017-2025
Overall: Calculations were done by age groups in the 2021 Global Deloitte Digital Study commissioned by Snap Inc. and netted up into a generational view. The following methodology was used for each age group (Ages: 13-17, Ages 18-24, Ages: 25-34, Ages: 35-44, Ages: 45-50)

### 2021 and 2022 Baselines

| Step 1: Determine Global Population for ages 10-69 (5.99B) |
| Note: Survey only included Ages 13-50. Ages 10-12 were assumed to have similar behavior to Ages 13-17. Ages 51-69 were assumed to have similar behavior to Ages 45-50. |
| Step 2: Determine percent of people within crosstab of survey questions for Frequency of photos/videos taken daily AND % of photos and or videos that are AR. 2021 based on responses to behaviors today. 2022 based on responses to behaviors next year. |
| Step 3: Apply percent of population from Step 2 to population to get number of people within each crosstab |

### 2023-2025 Forecast

| 2023-2025 | 2007 Growth Rate of Smartphone Device Sales |
| Note: Device growth is used as a proxy for photos/videos growth. Growth rate assumes 2007 smartphone device growth. As of 2021, there are ~1.05B AR Compatible Devices: ARCore (Android) + ARKit (iOS). If this grows at global smartphone growth equivalent, there could be ~4.1B by 2025 |

#### AR Photos / Videos per Day Methodology

2. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
3. AR Insider Article, “ARCore Reaches 400 Million Devices”
4. Statista Research, “Augmented reality (AR) and virtual reality (VR) headset shipments worldwide 2020-2025”

### Step 1: Identify scenarios for number of photos and or videos taken daily

| Note: Since the survey had ranges (few than 5, 5-10, 10 or more), to determine the number of photos, we developed a low, mid, high case. Low: assumes lowest quantity in each range (1,5,10) Mid: assumes average of low and high case (2.5, 7, 12) High: assumes highest quantity in each range (5, 10, 14) 14 was used as a cap for high case to keep daily photos at a reasonable amount for an average user |
| Step 2: Select case to apply to analysis |
| Note: High case was chosen based on input from Snap Inc. |

### Step 2: Identify scenarios for percent of photos and or videos that are AR

| Note: Since the survey had ranges (less than 20%, 20-40%, 40-60%, 60-80%, Over 80%), to determine number of photos taken daily that were AR, we developed a low, mid, high case. Low: assumes lowest quantity in each range (0%, 20%, 20%, 60%, 80%) Mid: assumes average of low and high case (10%, 30%, 50%, 70%, 90%) High: assumes highest quantity in each range (20%, 40%, 60%, 80%, 100%) |
| Step 2: Select case to apply to analysis |
| Note: High case was chosen based on input from Snap Inc. |

### Step 3: Apply adjustment factor to correct for people who are using AR but may not realize it

| Note: Based on 2021 Global Deloitte Digital Study commissioned by Snap Inc., it was discovered that ~13% of respondents who use AR could not successfully identify AR >50% of the time. |

### Step 1: Take annual AR photos and or videos and divide by 365 to get daily AR photos and or videos

| Step 2: Add all age groups to get total daily AR photos and or videos |

### 2022 Baseline × 2007 Growth Rate of Smartphone Device Sales

| Daily AR Photos and/or Videos |
| Step 1: Take annual AR photos and or videos and divide by 365 to get daily AR photos and or videos by age group |
| Step 2: Add all age groups to get total daily AR photos and or videos |
## Expert Interviews

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