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

For a more comprehensive market view, please read the Snap Consumer AR Global Report.
01 Introduction
AR is the next form of mobile engagement, elevating the consumer experience and setting new expectations for digital engagement.

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

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

04 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.

05 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 60% of the Netherlands population and almost all people who use social / communication apps will be frequent AR users.¹

72% 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.

68% of Snapchatters in the Netherlands 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 76% 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 = Aggregate average (n=741)
⁴ All Snapchatters (n=349)
⁵ Base = Aggregate (n=701)
⁶ Base = Agree (n=363)
⁷ Base = Agree (n=440)
⁸ What do you think of Snap’s AR feature? / Snap is a cool company / It’s not useful / It’s not useful & not cool / Agree much / Agree somewhat / Agree a little / Agree not at all / Neutral
⁹ Harvard Business Review Article, "How AR is Redeﬁning 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, nearly 60% of the Netherlands population* and almost all people who use social/communication apps will be frequent AR users.¹

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1. See additional methodology details in appendix.

**Frequent AR Consumers**

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

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¹Global population includes people ages 13-69 (based on UN World Population Prospects 2019). 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 be with 2000-2003 growth rate of smartphone users since AR is in the toy phase of adoption of new tech at where this transition took place with mobile phones, 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.

Note: 2021 AR Consumers based on people who use AR weekly or daily from 2021 Global Deloitte Digital Study commissioned by Snap Inc.
Younger generations and Snapchatters are driving AR growth

**Age Differences**

Younger people are **66% more likely** to use AR,¹ and they are **35% 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 are **2.5x as likely** to use AR frequently compared to Non-Snapchatters.⁴ **Almost 60%** of Snapchatters believe AR is important to their lives.⁵

1. 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Age 13-17 (n=59), Age 18+ (n=176)
2. 2021 Global Deloitte Digital Study commissioned by Snap Inc.
3. Publicis Groupe & Snap Inc. Study 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. Deloitte Digital
“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

93%

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 $87\%$ more likely to pay attention to a brand.$^2$

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$^1$ Deloitte 2021 Global Deloitte Digital Study commissioned by Snap Inc.

$^2$ Zappar Article, “How augmented reality affects the brain”
Brands and people connect better with AR experiences

30% more likely to be considered if they have a branded AR experience.¹

Snapchatters are 57% more likely than Non-Snapchatters to share a brand’s AR experience with friends and family.²

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc.
² Base = Snapchatters (n=166), Non-Snapchatters (n=105)

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? A: I am more likely to share a brand’s AR experience with friends and family.
AR builds consumer confidence

46% 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
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

Interacting with products that have AR experiences leads to a 94% higher conversion rate, as individuals can better assess them and feel connected with brands.¹

Snapchatters are 37% more likely to purchase products through a brand’s website than Non-Snapchatters.²

¹ Harvard Business Review, “How AR is Redefining Retail in the Pandemic”
² 2021 Global Deloitte Digital Study commissioned by Snap Inc.
AR connections drive revenue

Consumers who interact with a brand's AR experience are...

26% more likely to share the experience with family and friends

20% more likely to purchase products from the brand

Snapchatters are 90% more likely than Non-Snapchatters to use AR to connect with others.

Snapchatters share AR photos and videos with friends and/or family 94% more than Non-Snapchatters.

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1: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base: Aggregate (n=271)

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? A: I am more likely to share a brand’s AR experience with friends and family

2: Base = Aggregate (n=203)

Q: Same as above | A: I am more likely to purchase their products through the brand’s app where I saw the brand’s AR experience

3: Base = Snapchatters (n=128), Non-Snapchatters (n=67)

Q: Why do you use AR? A: Several times each day

Q: How often do you capture or share photos and videos with your friends and/or family? A: Several times each day
AR is Evolving Fast
On Snapchat, there are 500 million minutes of AR playtime per day on average.²

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

AR Photos / Videos Per Day¹

Generational Breakout of Daily AR Photos / Videos Created

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

On Snapchat, there are 8 million AR photos and / or videos are taken daily by consumers.
AR is Here
Today and
Here to Stay
Where do Snapchatters use AR most today?

68% of Snapchatters use AR primarily in their homes.¹

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

What are Snapchatters using AR for at home?²

85% Communication

57% Media & Entertainment

53% Gaming

48% Shopping

Today’s use cases most align with activities you would do at home, and 95% of Snapchatters say they will use AR at home more than last year.³

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=340). 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

² Base = Snapchatters at home – Communication (n=290), Media & Entertainment (n=195), Gaming (n=181), Shopping (n=162). 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

³ 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? | A: I will use AR more than last year, I will use AR about the same amount as last year

Note: Across all 15 markets, the 2021 Global Deloitte Digital Study commissioned by Snap Inc. was fielded from February 23, 2021 to April 5, 2021. Since the survey was conducted during the COVID-19 pandemic, primary usage of AR in consumers’ homes may be higher than normal today’s use cases most align with activities you would do at home, and 95% of Snapchatters say they will use AR at home more than last year.
How are Snapchatters learning about AR?

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

Snapchatters are almost 33% more likely to discover AR through social media, communication, and camera apps than Non-Snapchatters.³

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc.
² Base = Snapchatters who use AR all the time (n=104), Snapchatters who have used AR before (n=109)
³ Base = Snapchatters (n=85), Non-Snapchatters (n=67)
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?

Snapchatters frequently use AR for communication (+90%) and gaming (+72%) more than Non-Snapchatters.9

**Communication**
- 86% use

- 49% to be more creative

**Media**
- 66% use

- 43% to make what they are watching more enjoyable

**Gaming**
- 58% use

- 43% to make gameplay more interactive

**Shopping**
- 57% use

- 37% to try products out

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1. 2021 Global Deloitte Digital study commissioned by Snap Inc.
2. Base = Snapchatters (n=339)
3. Base = Snapchatters (n=315)
4. Base = Snapchatters (n=295)
5. Base = Snapchatters (n=130)
6. Base = Snapchatters (n=103)
7. Base = Snapchatters (n=106)
8. Base = Snapchatters (n=87)
9. Base = Snapchatters – Communication (n=115), Non-Snapchatters – Communication (n=58), Snapchatters – Gaming (n=123), Non-Snapchatters – Gaming (n=61)
What are Snapchatter shoppers using AR for, today?¹

<table>
<thead>
<tr>
<th>Category</th>
<th>AR Use (%)</th>
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<tr>
<td>Retail</td>
<td>81%</td>
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<tr>
<td>Restaurant &amp; Food Delivery</td>
<td>64%</td>
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<tr>
<td>Home Décor</td>
<td>80%</td>
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<tr>
<td>Beauty and Wellness</td>
<td>62%</td>
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<tr>
<td>Entertainment</td>
<td>72%</td>
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<tr>
<td>Household goods</td>
<td>61%</td>
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<tr>
<td>Telecommunications</td>
<td>67%</td>
</tr>
<tr>
<td>Automotive</td>
<td>58%</td>
</tr>
<tr>
<td>Restaurant &amp; Food Delivery</td>
<td>64%</td>
</tr>
</tbody>
</table>

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base: n = 250 respondents in Asia Pacific (Australia, China, Hong Kong, India, Japan), Europe (France, Germany, Italy, Spain, UK), Latin America (Brazil, Mexico) and the Middle East (Saudi Arabia, UAE, Jordan, Israel, Israel-Palestine).
What are Snapchatter shoppers using AR for, today?¹

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

- 74% of shoppers are likely to use AR when they come across it²
- 40% help shoppers decide what to buy³
- 37% discovering that way¹

Shopping and browsing is the main way shoppers discover AR

¹: 2020 Global Deloitte Digital Study commissioned by Snap Inc.
²: Base = Snapchatters (n=172)
³: Base = Snapchatters (n=94)
Almost 3 in 4 Snapchatters believe that AR will be even more important in their lives in the next 5 years.¹

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

- **Shopping**²: 45%
- **Gaming**³: 40%
- **Media**⁴: 37%
- **Communications**⁵: 28%

46% want to readily view information about an item or product as soon as it's scanned with the phone camera.⁶

40% want to project their AR avatar into their favorite games, media & entertainment.⁸

30% want to create their own interactive media plots by guiding characters through a script.⁸

34% want to customize environments to their own imagination and share with others.⁶

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¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
Base = Snapchatters (n=360)
Q: How useful and/or important do you think AR will be in your life in 5 years? | A: Very useful / important, Somewhat useful / important

²: Base = Snapchatters (n=104)
Q: Will you use AR while browsing and/or shopping more or less than last year?

³: Base = Snapchatters (n=99)
Q: Will you use AR in gaming more or less than last year?

⁴: Base = Snapchatters (n=91)
Q: How would you like to use AR in the next year to enhance the way you view sports, concerts, movies, and TV?

⁵: Base = Snapchatters (n=76)
Q: How do you feel about AR on social media, communication, and camera apps?
A: I want more ways to interact with friends and family using AR

⁶: Base = Readily view information about item or product (n=164), Project through AR avatar (n=143), Customize environments (n=124), Create TV/Movie/Video plot narratives (n=108)
Q: Below is a list of ways you could use AR in the future. Please mark all the ways that you would be interested in using AR.
Utility is a primary driver for Snapchatters’ future AR usage\(^1\)

**Wellness**
- TV & Sports: ↑71%
- Navigation: ↑43%
- Communicate: ↑6%

**Instructions**
- ↑52%

**Navigate**
- ↑21%

**Learn Something New**
- ↑32%

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

Base = Snapchatters, Why use AR - Wellness (n=39), Improve Productivity (n=56), Instructions (n=81), Learn something new (n=123), TV & Sports (n=60), Navigation (n=108), Communicate (n=153), Improve Shopping (n=133) | Snapchatters, Desire for more AR use - Wellness (n=133), Improve Productivity (n=123), Instructions (n=123), Learn something new (n=163), TV & Sports (n=102), Navigation (n=155), Communicate (n=162), Improve Shopping (n=162)
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

62% believe AR allows them to be more creative.¹

53% believe they are AR creators in their everyday lives.²

Snapchatters are 1.6x as likely to be AR creators.³

66%

Snapchatters

versus

41%

Non-Snapchatters

have used tools to create AR.

¹ 2021 Global Deloitte Digital Study commissioned by Snap Inc.
² Base: Aggregate (n=642)
³ Q: How much do you agree or disagree with each of the statements below? AR allows me to be more creative |

A: Agree/strongly agree

B: Neither agree nor disagree

C: Disagree/strongly disagree

Base: Aggregate (n=548), Snapchatters (n=339), Non-Snapchatters (n=209)

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 lenses/filters/effects? | A: Yes

27% Snapchatters are 1.6x as likely to be AR creators.

66% Snapchatters vs. Non-Snapchatters have used tools to create AR.

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

Snap Inc.

Snap Inc.

Deloitte

Digital
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
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
Netherlands 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.¹ and extrapolated to population

Population Base

2021 Global Population Base: People ages 13-69 = 5.61B worldwide in 2020²
2021 Social and Communications App Population Base: Global Population x Social Media Penetration Rate (48% in 2021)³ = 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

2022 Baseline

See above

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)

¹: 2021 Global Deloitte Digital Study commissioned by Snap Inc.
³: 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

<table>
<thead>
<tr>
<th>Step 1: Identify scenarios for number of photos and or videos taken daily</th>
<th>Step 1: Identify scenarios for percent of photos and or videos taken that are AR</th>
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<tbody>
<tr>
<td>Note: Since the survey had ranges (fewer 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</td>
<td>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%)</td>
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<tr>
<td>Step 2: Select case to apply to analysis</td>
<td>Step 2: Select case to apply to analysis</td>
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<td>Note: High case was chosen based on input from Snap Inc.</td>
<td>Note: High case was chosen based on input from Snap Inc.</td>
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### 2023-2025 Forecast

#### 2022 Baseline

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<th>2007 Growth Rate of Smartphone Device Sales</th>
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#### 2023-2025 Forecast

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<th>Daily AR Photos and/or Videos</th>
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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
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