



# Snap Consumer

# AR

Sweden  
Report  
2021

The following report is a deep dive into how Snapchatters are using AR in Sweden based on the Snap Consumer AR Global Report.  
For a more comprehensive market view, please read the [Snap Consumer AR Global Report](#).

# Table of Contents

## 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.

# O1

## Introduction

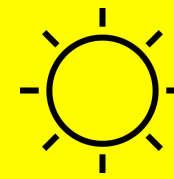
# Key Takeaways



AR adoption is tracking with the mobile usage boom - by 2025, over **70% of Sweden's population and almost all people who use social / communication apps will be frequent AR users.**<sup>1</sup>



**68% of people successfully identify AR when they see it**<sup>2</sup>, but when talking about it, they have a hard time defining or describing what it is.



**68% of Snapchatters in Sweden and across generations use AR to have fun**; the majority are discovering AR through social / communications apps.<sup>3</sup>



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.<sup>4</sup>




Interacting with products that have AR experiences leads to a **94% higher conversion rate.**<sup>5</sup>

1: See additional methodology details in appendix  
 2: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
 Base = Aggregate average (n=689)  
 Q: AR Recognition for 9 examples  
 3: Base = Snapchatters (n=353)  
 Q: Why do you use AR?  
 4: Base = Aggregate (n=769)  
 Q: Augmented Reality is useful / Augmented Reality is not useful | A: Agree much more with A, Agree somewhat more with A  
 5: 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."

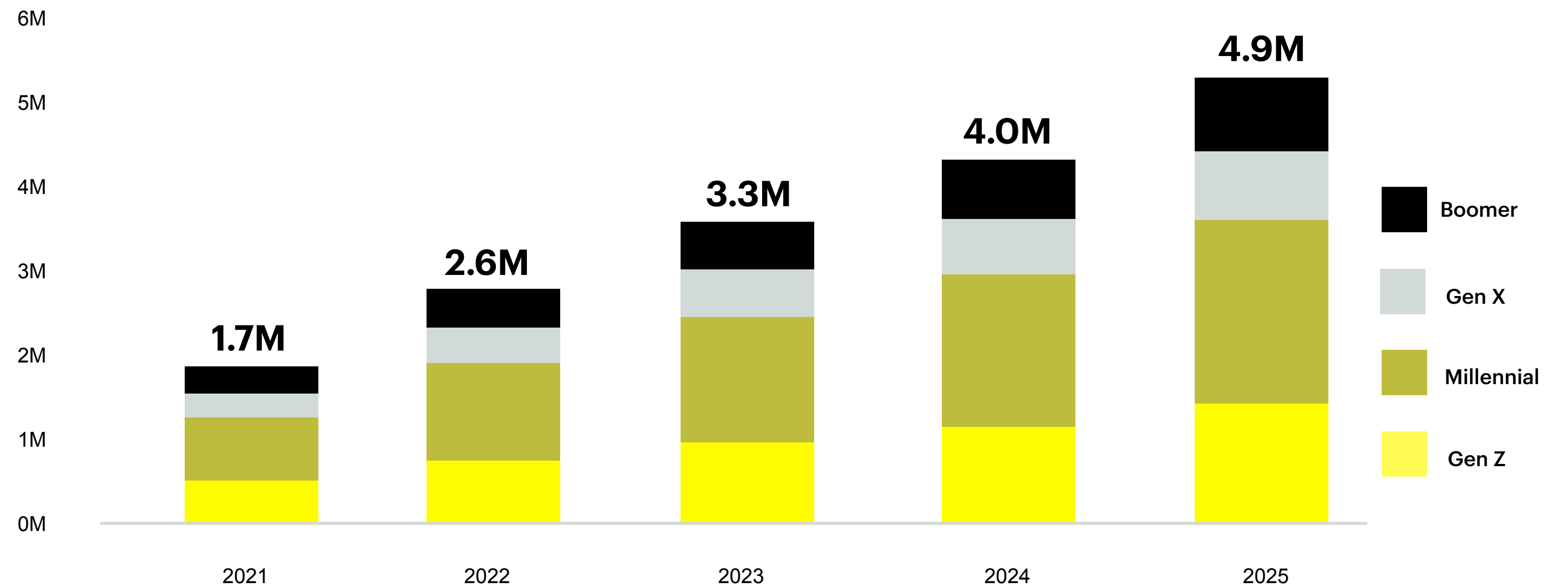
 Eitan Pilipski  
SVP Camera Platform  
Snap Inc.

# AR is growing

By 2025, **over 70%** of the Swedish population\* and almost all people who use social / communication apps will be frequent AR users.<sup>1</sup>

## Frequent AR Consumers

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



<sup>1</sup>: 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 in line with 2000-2003 growth rate of smartphone users 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).

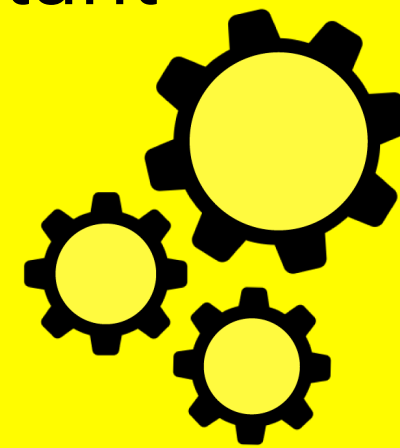
# Younger generations and Snapchatters are driving AR growth

## Age Differences



Younger people are **102% more** likely to use AR,<sup>1</sup>

and they are **28% more** likely to believe AR is important in their lives.<sup>2</sup>



But, AR is not just for Gen Z; **Millennials and Gen X show the highest affinity for AR.**<sup>3</sup>

## Snapchatters



Snapchatters are **1.35x** as likely to use AR frequently compared to Non-Snapchatters.<sup>4</sup>

**58%** of Snapchatters believe AR is important to their lives.<sup>5</sup>

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Age 13-17 (n=66), Age 18+ (n=185)  
Q: How familiar are you with AR? | A: I use AR all the time  
2: Base = Age 13-17 (n=96), Age 45+ (n=59)  
Q: AR is important to me / AR is not important to me | A: Agree much more with A, Agree somewhat more with A  
3: Publicis Groupe & Snap Inc. Study  
Base: Gen Z (n=1,261), Millennials (n=1,632), Gen X (n=1,107)  
Q7A: Thinking about your expected use of AR technology post-COVID, do you expect to start using AR? Please select one response  
4: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters (n=147), Non-Snapchatters (n=104)  
Q: How familiar are you with AR? | A: I use AR all the time  
5: Base = Snapchatters (n=299)  
Q: AR is important to me / AR is not important to me | A: Agree much more with A, Agree somewhat more with A

“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.<sup>1</sup>

**96%**

of Snapchatters agree they'll use AR the same or more when shopping next year.<sup>2</sup>

1: Gartner Press Release  
2: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters (n=226)  
Q: Will you use AR while browsing and/or shopping more or less than last year?



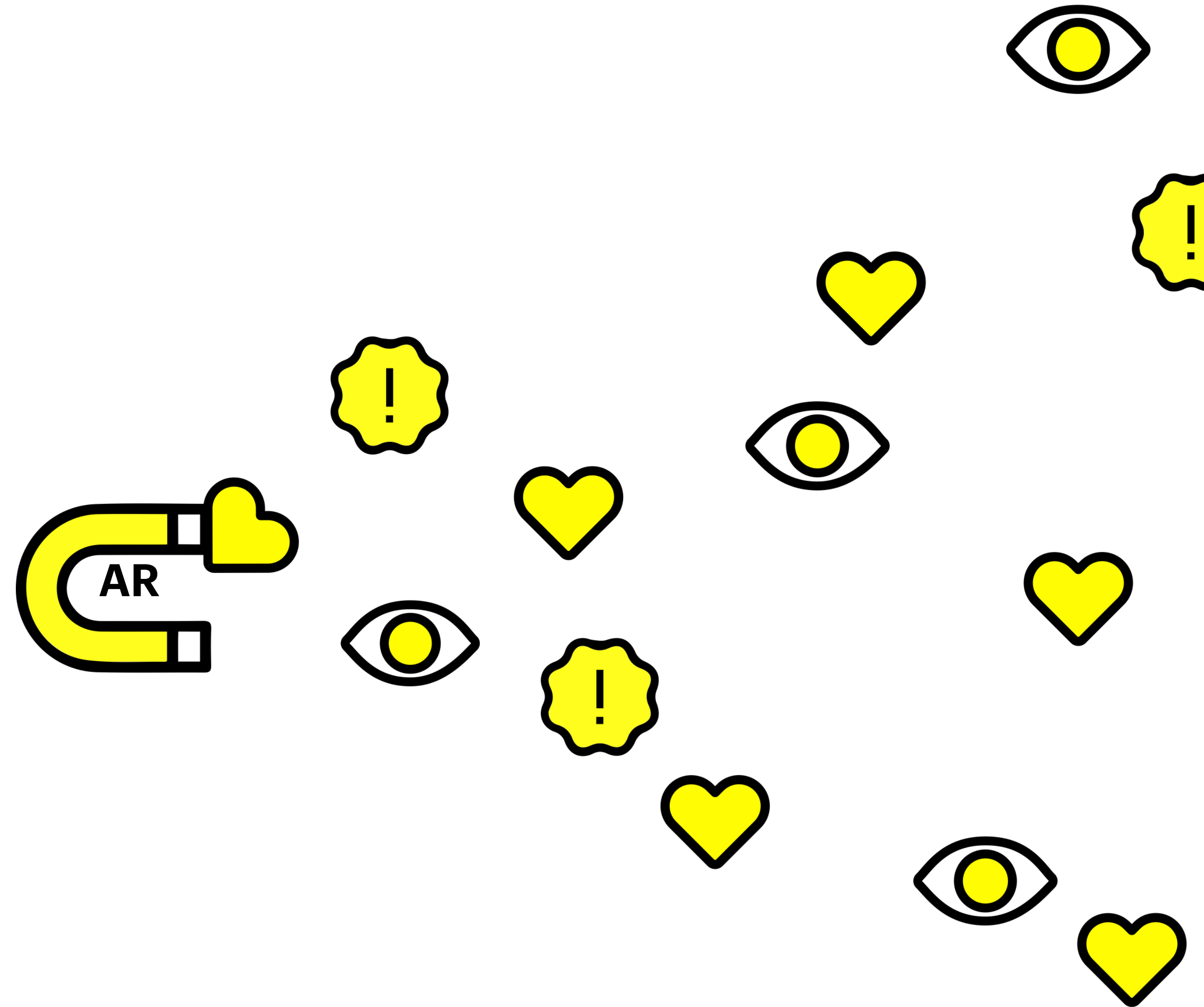


# AR captures consumer attention

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.<sup>1</sup>



Snapchatters who frequently use AR with their family and friends are **30% more likely to pay attention to a brand.**<sup>2</sup>



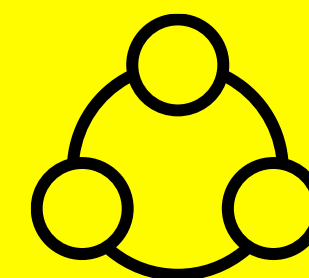
1: Zappar Article, "How augmented reality affects the brain"  
2: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters (n=154)  
Q: Sometimes brands will create AR experiences through an app camera (e.g., a big movie company makes an AR experience where the heroes of a movie 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?

# Brands and people connect better with AR experiences

Brands are

# 35%

**more likely** to be considered if they have a branded AR experience.<sup>1</sup>



Snapchatters are **45% more likely** than Non-Snapchatters to share a brand's AR experience with friends and family.<sup>2</sup>

<sup>1</sup>: 2021 Global Deloitte Digital Study commissioned by Snap Inc.

Base = People who use AR all the time (n=88)

Q: How familiar are you with AR? | A: I use AR all the time | 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 pay more attention to the brand, I am more likely to share a brand's AR experience with friends and family, I am more likely to consider their products

<sup>2</sup>: Base = Snapchatters (n=162), Non-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? | A: I am more likely to share a brand's AR experience with friends and family

# AR builds consumer confidence

## Nearly half

of Snapchatter shoppers agree that AR gives them more confidence about product quality.<sup>1</sup>

+

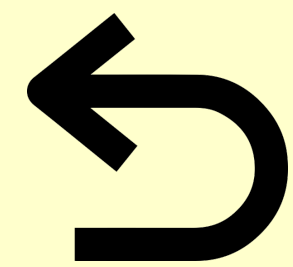
## Over half

of people want to use AR technology to assess products, allowing for a risk free, "try-before you buy", experience.<sup>2</sup>



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

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



1: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=247)  
Q: How does AR impact your browsing and/or shopping experience?  
2: NielsenIQ Analysis, Augmented retail: The new consumer reality  
3: 2016 Label Insight Transparency ROI Study via Inc.  
4: ARInsider 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

1: Harvard Business Review Article, "How AR is Redefining Retail in the Pandemic"

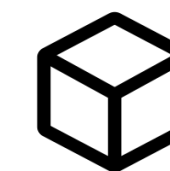
2: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters (n=105), Non-Snapchatters (n=87)

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 purchase their products through the brand's website

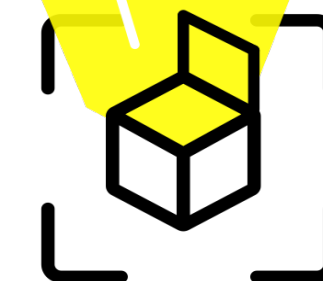
Interacting with products that have AR experiences leads to a

# 94%

**higher conversion rate**, as individuals can better assess them and feel connected with brands.<sup>1</sup>



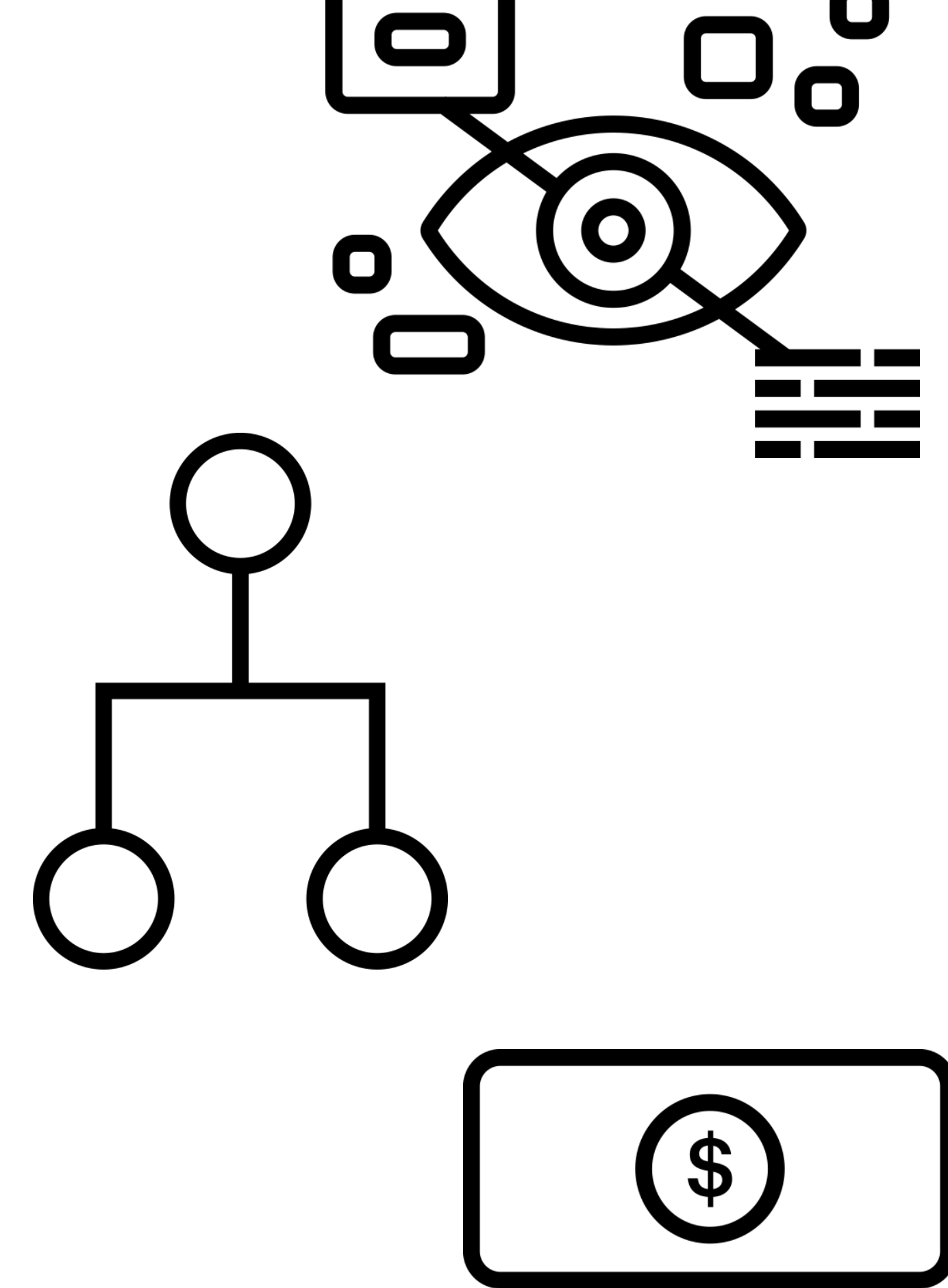
vs.



Snapchatters are **15% more likely** to purchase products through a brand's website than Non-Snapchatters.<sup>2</sup>

# AR connections drive revenue

Consumers who view AR as a social activity are **16% more likely** to purchase products from the brand.<sup>1</sup>



1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
 Base = AR is a group activity - Agree much more / somewhat more with (n=118), Aggregate (n=193)  
 Q: AR is a group activity / AR is a solo activity | A: Agree much more / somewhat more with A | 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 purchase their products through the brand's app where I saw the brand's AR experience  
 2: Base = Snapchatters (n=91), Non-Snapchatters (n=42)  
 Q: Why do you use AR?  
 3: Base = Snapchatters (n=82), Non-Snapchatters (n=63)  
 Q: How often do you capture or share photos and videos with your friends and/or family? | A: Several times each day



- Snapchatters are **108% more likely** than Non-Snapchatters to use AR to connect with others.<sup>2</sup>
- Snapchatters share AR photos and videos with friends and/or family **25% more** than Non-Snapchatters.<sup>3</sup>

AR

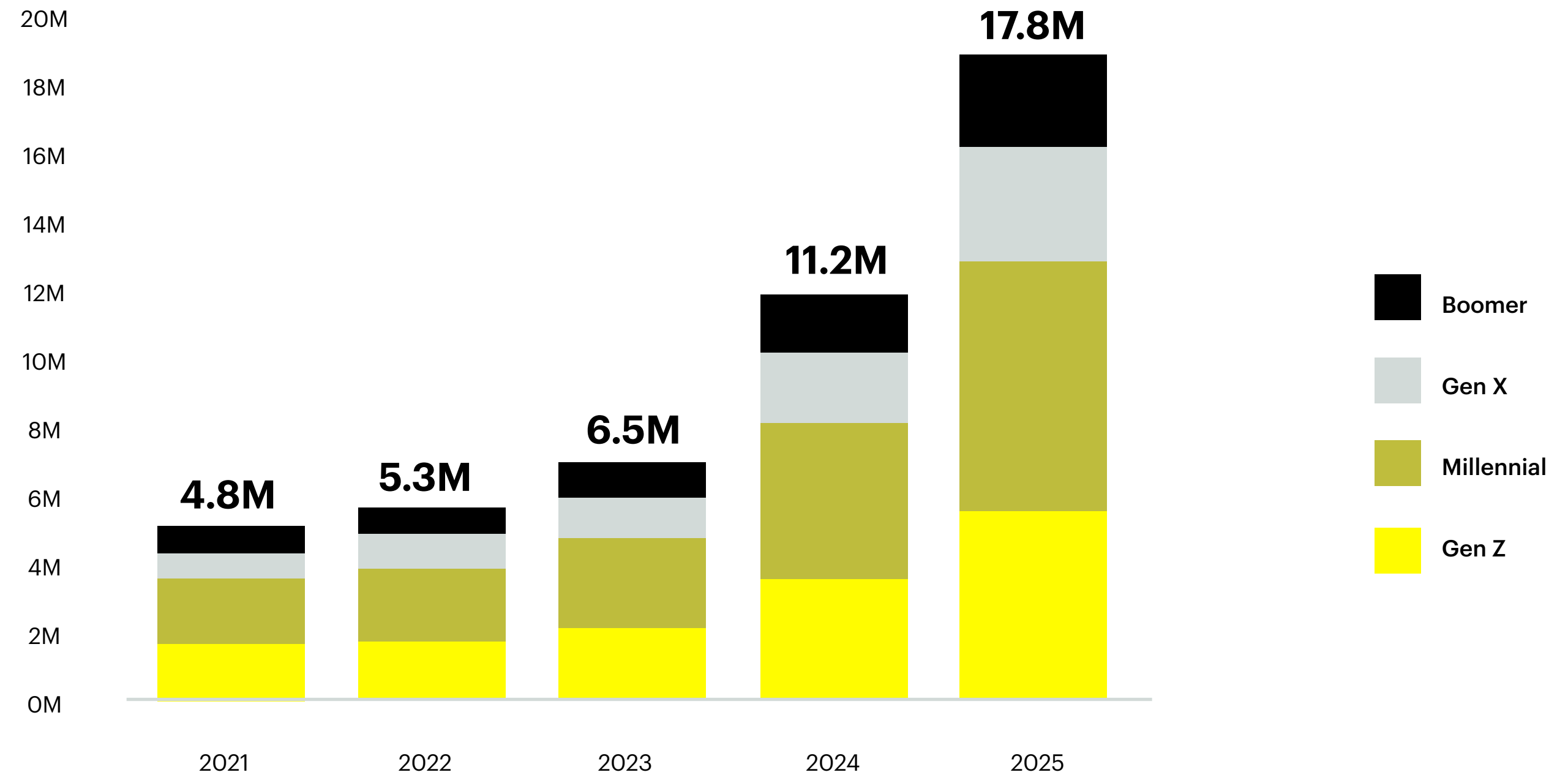
AR is  
Evolving  
Fast

Almost **5 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.

## AR Photos / Videos Per Day<sup>1</sup>

Generational Breakout of Daily AR Photos / Videos Created



**+40%**

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



On Snapchat, there are **500 million minutes** of AR playtime per day on average.<sup>2</sup>

1: See additional methodology details in appendix; CAGR: 4-year compounded annual growth rate that measures the annual increase in AR Photos / Videos per day from 2021 to 2025  
2: Snap Inc. internal data Q1 2020.

Q4

AR is Here  
Today and  
Here to Stay

# Where do Snapchatters use AR most today?



## ~75% of Snapchatters use AR primarily in their homes.<sup>1</sup>

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

### What are Snapchatters using AR for at home?<sup>2</sup>



## 88% Communication



## 52% Media & Entertainment



## 50% Gaming



## 33% Shopping

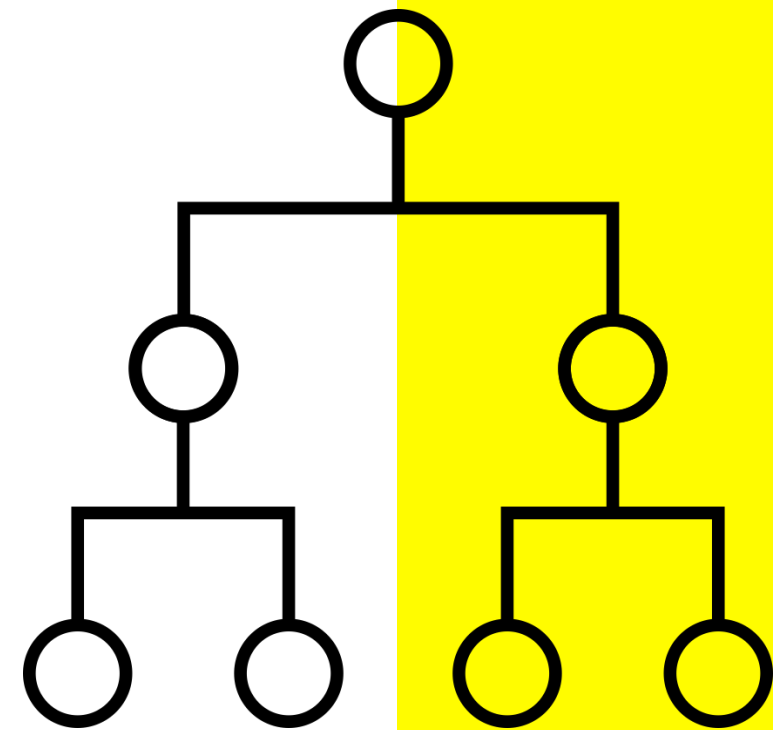
Today's use cases most align with activities you would do at home, and 93% of Snapchatters say they will use AR at home more than last year.<sup>3</sup>

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=364)  
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=321), M&E (n=188), Gaming (n=182), Shopping (n=121)  
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  
3: Base = Snapchatters (n=482)  
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

Note: Across all 15 markets, the 2021 Global Deloitte Digital Study commissioned by Snap Inc in field 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

# How are Snapchatters learning about AR?

# 85%



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

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

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
 Base = Snapchatters (n=430)  
 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, or camera app, I stumbled across it while exploring viral content on social media, communication, or camera app, I saw celebrities / influencers use it on social media, communication, and camera apps, I read about it on a blog / forum, I heard about it from friends / family, in-person  
 2: Base = Snapchatters who use AR all the time (n=87), Snapchatters who have used AR before (n=140)  
 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%  
 3: Base = Snapchatters (n=97), Non-Snapchatters (n=60)  
 Q: Where did you first discover AR content?



Snapchatters are almost **64% more likely** to discover AR through an advertisement than Non-Snapchatters.<sup>3</sup>



# 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 (+36%) and gaming (+52%) more than Non-Snapchatters.<sup>9</sup>

**Communication**  
89% use<sup>1</sup>



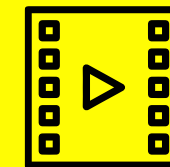
**40% to be more creative<sup>5</sup>**

**Media**  
58% use<sup>2</sup>



**44% to make what they are watching more enjoyable<sup>6</sup>**

**Gaming**  
56% use<sup>3</sup>



**31% to make gameplay more interactive<sup>7</sup>**

**Shopping**  
41% use<sup>4</sup>



**31% to try products out<sup>8</sup>**

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Snapchatters (n=459)  
Q: Frequency of Use by Reason: Communication | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month  
2: Base = Snapchatters (n=301)  
Q: Frequency of Use by Reason: Media | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month  
3: Base = Snapchatters (n=289)  
Q: Frequency of Use by Reason: Gaming | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month  
4: Base = Snapchatters (n=211)  
Q: Frequency of Use by Reason: Shopping | A: Several times each day, Once a day, Several times a week, Once a week, A few times a month, Once a month  
5: Base = Snapchatters (n=110)  
Q: How does AR impact your communication experience?


6: Base = Snapchatters (n=102)  
Q: How does AR impact your entertainment experience?  
7: Base = Snapchatters (n=68)  
Q: How does AR impact your gaming experience?  
8: Base = Snapchatters (n=74)  
Q: How does AR impact your browsing and/or shopping experience?  
9: Base = Snapchatters - M&E (n=83), Non-Snapchatters - M&E (n=50), Snapchatters - Gaming (n=92), Non-Snapchatters - Gaming (n=61)  
Q: How often do you use AR when watching or interacting with media & entertainment? | A: Somewhat/Very Frequently | Q: How often do you use each type of AR when gaming? - Social media, communication, and camera apps that have AR games | A: Somewhat/Very Frequently

# What are Snapchatter shoppers using AR for, today?<sup>1</sup>

 **72%**  
Home Décor

 **52%**  
Travel

 **69%**  
Retail

 **49%**  
Household goods

 **61%**  
Telecommunications

 **47%**  
Automotive

 **56%**  
Entertainment

 **45%**  
Restaurant & Food Delivery

 **53%**  
Beauty and Wellness

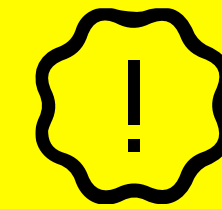
<sup>1</sup>: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters – Retail (n=163), Beauty and wellness (n=125), Household goods (n=116), Telecommunications (n=143),  
Restaurants / food delivery (n=106), Entertainment (n=133), Home décor (n=169), Automotive (n=110), Travel (n=123)  
Q: AR Shopping Categories | A: Total Used AR

# What are Snapchatter shoppers using AR for, today?<sup>1</sup>

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



**41%** discovered it through social, communication, and camera apps<sup>1</sup>



**52%** of shoppers are likely to use AR when they come across it<sup>2</sup>



**43%** help shoppers decide what to buy<sup>3</sup>

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters (n=97)  
Q: How have you found AR while browsing and/or shopping?  
2: Base = Snapchatters (n=124)  
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=101)  
Q: How does AR Impact your browsing and/or shopping experience?

# 2 in 3 Snapchatters believe that AR will be even more important in their lives in the next 5 years.<sup>1</sup>

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

↑ Media<sup>2</sup>  
42%

↑ Gaming<sup>3</sup>  
28%

↑ Communications<sup>4</sup>  
28%

↑ Shopping<sup>5</sup>  
25%

**23%** want to create their own interactive media plots by guiding characters through a script.<sup>6</sup>

**29%** want to readily view information about an item or product as soon as it's scanned with the phone camera.<sup>6</sup>

**31%** want to project their AR avatar into their favorite games, media & entertainment.<sup>6</sup>

**56%** want to customize environments to their own imagination and share with others.<sup>6</sup>

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters (n=345)  
Q: How useful and/or important do you think AR will be in 5 years?  
A: Very useful / important, Somewhat useful / important  
2: Base = Snapchatters (n=98)  
Q: How would you like to use AR in the next year to enhance the way you view sports, concerts, movies, and TV?  
3: Base = Snapchatters (n=63)  
Q: Will you use AR in gaming more or less than last year?

4: Base = Snapchatters (n=78)  
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  
5: Base = Snapchatters (n=60)  
Q: Will you use AR while browsing and/or shopping more or less than last year?  
6: Base = Readily view information about item or product (n=193), Project through AR avatar (n=101), Customize environments (n=105), Create TV/Movie/Video plot narratives (n=79)  
Q: Below is a list of ways you could use AR in the future. Please select all the ways that you would be interested in using AR.

Utility is a primary driver for Snapchatters' future AR usage<sup>1</sup>

Wellness  
↑ 146%

Improve Productivity  
↑ 90%

Instructions  
↑ 88%

Learn Something New  
↑ 54%

TV & Sports  
↑ 29%

Navigation  
↑ 19%

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
Base = Snapchatters, Why use AR - Wellness (n=57), Improve Productivity (n=69), Instructions (n=78), Learn something new (n=129), TV & Sports (n=84), Navigation (n=135) | Snapchatters, Desire for more AR use - Wellness (n=140), Improve Productivity (n=131), Instructions (n=146), Learn something new (n=199), TV & Sports (n=109), Navigation (n=161)  
Q: Why use AR | Q: Desire for more AR use

# 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

**57%**

believe AR allows them to be more creative.<sup>1</sup>

**45%**

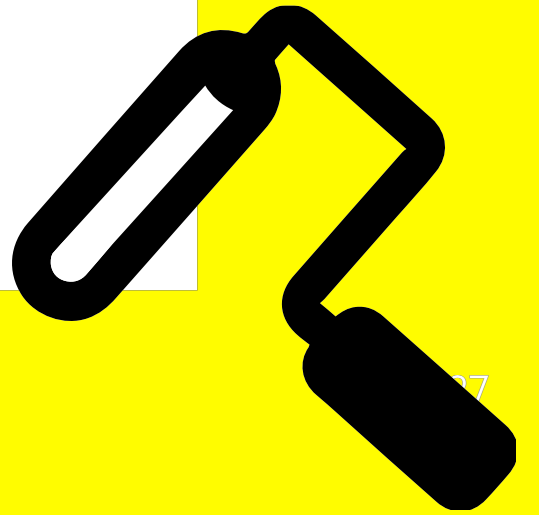
believe they are AR creators in their everyday lives.<sup>2</sup>

1: 2021 Global Deloitte Digital Study commissioned by Snap Inc. Base = Aggregate (n=574)  
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  
2 and 3: Base = Aggregate (n=453), Snapchatters (n=288), Non-Snapchatters (n=165)  
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

Snapchatters are **1.7x** as likely to be AR creators.<sup>3</sup>

**56%**

**Snapchatters**



vs.

**33%**

**Non-Snapchatters**

have used tools to create AR.



# 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**

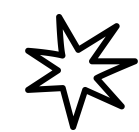
Q7

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.



Augmented Reality refers to experiences in which the real-world environment seen through your phone, computer, app camera, or an AR headset is altered or enhanced with the addition of images, objects, text, or other digitally-added information. Augmented Reality could be applied to both visuals of the front facing (selfie) and outward facing (world) cameras.<sup>1</sup>





# Report Methodology

## Research Overview Sweden 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

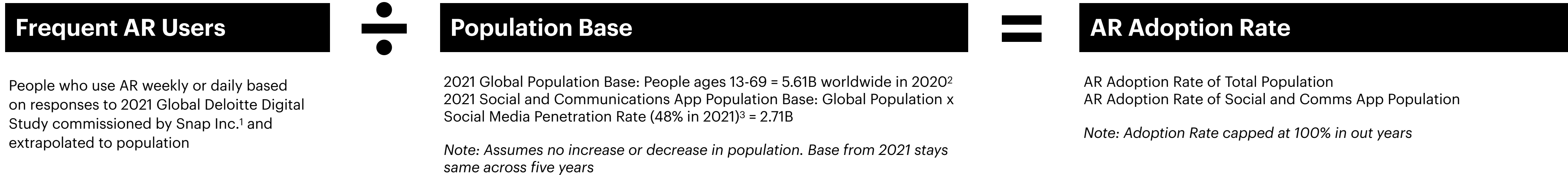
32

## Local Market Additions and Exceptions

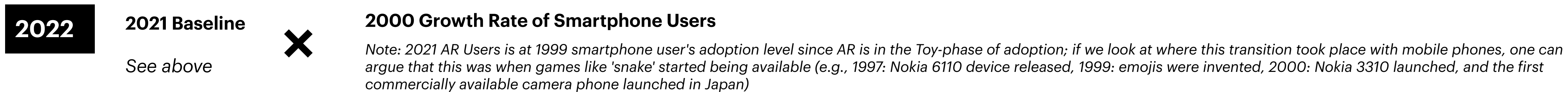
- US: Ethnicity quota (maximum 65% white respondents, maintained only for Snapchatters; Non-Snapchatters sample should be roughly nationally representative)
- KSA and UAE: Representative expat / citizen quotas (88% expat in UAE; 30% expat in KSA for both Snapchatters and Non-Snapchatters).
- Norway: 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



## 2022-2025 Forecast

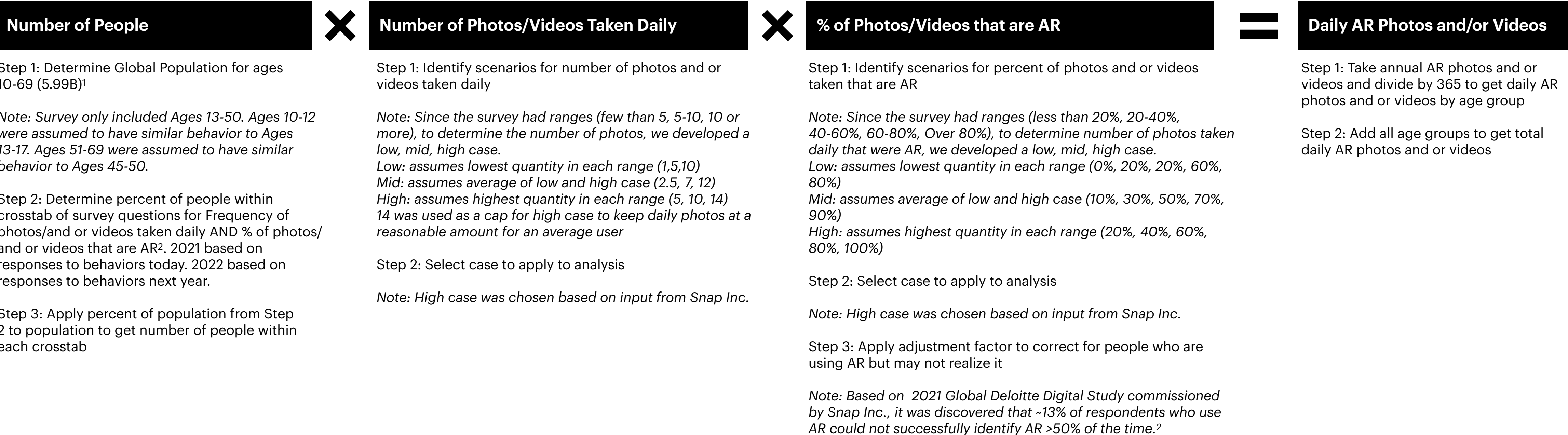


1: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
 Base = Aggregate (n=1,012)  
 Q: How often do you use AR for any of the following reasons? Communication  
 Note: Boomers assumed similar behavior to Gen X since Boomers were not part of survey group  
 2: United Nations Population Division Department of Economic and Social Affairs, World Population Prospects 2019, World Population 2020  
 3: Statista Global Social Network Penetration 2017-2025

# AR Photos / Videos per Day Methodology

**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



## 2023-2025 Forecast



1: United Nations Population Division Department of Economic and Social Affairs, World Population Prospects 2019, World Population 2020  
 2: 2021 Global Deloitte Digital Study commissioned by Snap Inc.  
 Base = Aggregate (n=1,012)

Q: How many photos or videos do you capture on your phone's native (non-app) camera and across all apps in a day? And thinking about all the photos and videos you capture on your phone in a day, what percent of them are captured with or edited to include AR?  
 3: AR Insider Article, "ARCore Reaches 400 Million Devices"

4: Statista\_Research, "Augmented reality (AR) and virtual reality (VR) headset shipments worldwide 2020-2025"

# Expert Interviews

<b>First Name</b>	<b>Last Name</b>	<b>Country</b>	<b>Company</b>	<b>Date</b>
Glen	Gainor	United States	Amazon Studios	2/13/2021
Raimon	Homs	Spain	Deloitte	2/16/2021
Bryan	Rokoszak	United States	Deloitte Digital	2/16/2021
Alan	Smithson	Canada	MetaVRse	2/16/2021
Ed	Grieg	United Kingdom	Deloitte	2/17/2021
Adrian	Mills	Australia	Deloitte Digital	2/17/2021
Bill	Briggs	United States	Deloitte	2/18/2021
Yagna	Akuluri	India	Deloitte	2/22/2021
Joanna	Popper	United States	HP	2/22/2021
Jason	Williamson	United States	Deloitte	2/22/2021
Donald	Brady	United States	Deloitte Digital	2/23/2021
Shashi	Deethi	India	Deloitte	2/23/2021
Ram	Chandel	United States	Deloitte	2/23/2021
Lokesh	Ohri	United States	Deloitte	2/23/2021
Steven	Bailey	United States	Deloitte	2/23/2021
Jean-Emmanuel	Biondi	United States	Deloitte	2/23/2021
Dea	Lawrence	United States	Variety	2/23/2021
Shrenik	Sadalgi	United States	Wayfair	2/24/2021
Mike	Boland	United States	ARtillery	2/24/2021
Jason	Yim	United States	Trigger Global	2/25/2021
Paul	McDonagh-Smith	United Kingdom	MIT	2/26/2021
Kaitlyn	Kuczer	United States	Deloitte Digital	2/26/2021
Max	Dawes	United Kingdom	Zappar	2/26/2021
Alex	Sanger	United States	Universal Pictures	2/26/2021
Walter	Delph	United States	Magic Leap	3/1/2021
Snehaal	Dhruv	India	SuperFan	3/1/2021



# Expert Interviews

First Name	Last Name	Country	Company	Date
Tony	Parisi	United States	Unity	3/3/2021
Anwar	Noriega	Mexico	CEO / Cofounder at Wabisabi Design	3/4/2021
Ines	Alpha	France	3D Makeup Artist	3/5/2021
Alice	Bezirard-Fischer	United Arab Emirates	Wella Company	Write-in
Kirsten	Soumas	United States	Verizon	3/8/2021
Shane	Horneij	United Kingdom	Performance Marketing King	3/9/2021
Qi	Pan	United Kingdom	Snap	3/9/2021
Kimberlee	Archer	United States	Snap	3/9/2021
Carolina	Arguelles	United States	Snap	3/9/2021
Robert	Triefus	Switzerland	Gucci	3/12/2021
Clara	Bacou	United Kingdom	Lens Creator	3/11/2021
Timoni	West	United States	Unity	3/16/2021
Lara	Bean	United Kingdom	adidas	3/16/2021
Peggy	Johnson	United States	Magic Leap	3/19/2021
Jon	Cheney	United States	Seek XR	3/17/2021
James	Clarke	United States	Frito-Lay North America	Write-in
Andrew	McPhee	United States	Snap	3/17/2021
Eitan	Pilipski	United States	Snap	3/17/2021
Allan	Cook	United States	Deloitte Digital	3/18/2021



# About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.

This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.