



WHERE ARE THE REAL OPPORTUNITIES IN THE IMMERSIVE TECH MARKET?

VRX USA December 2017

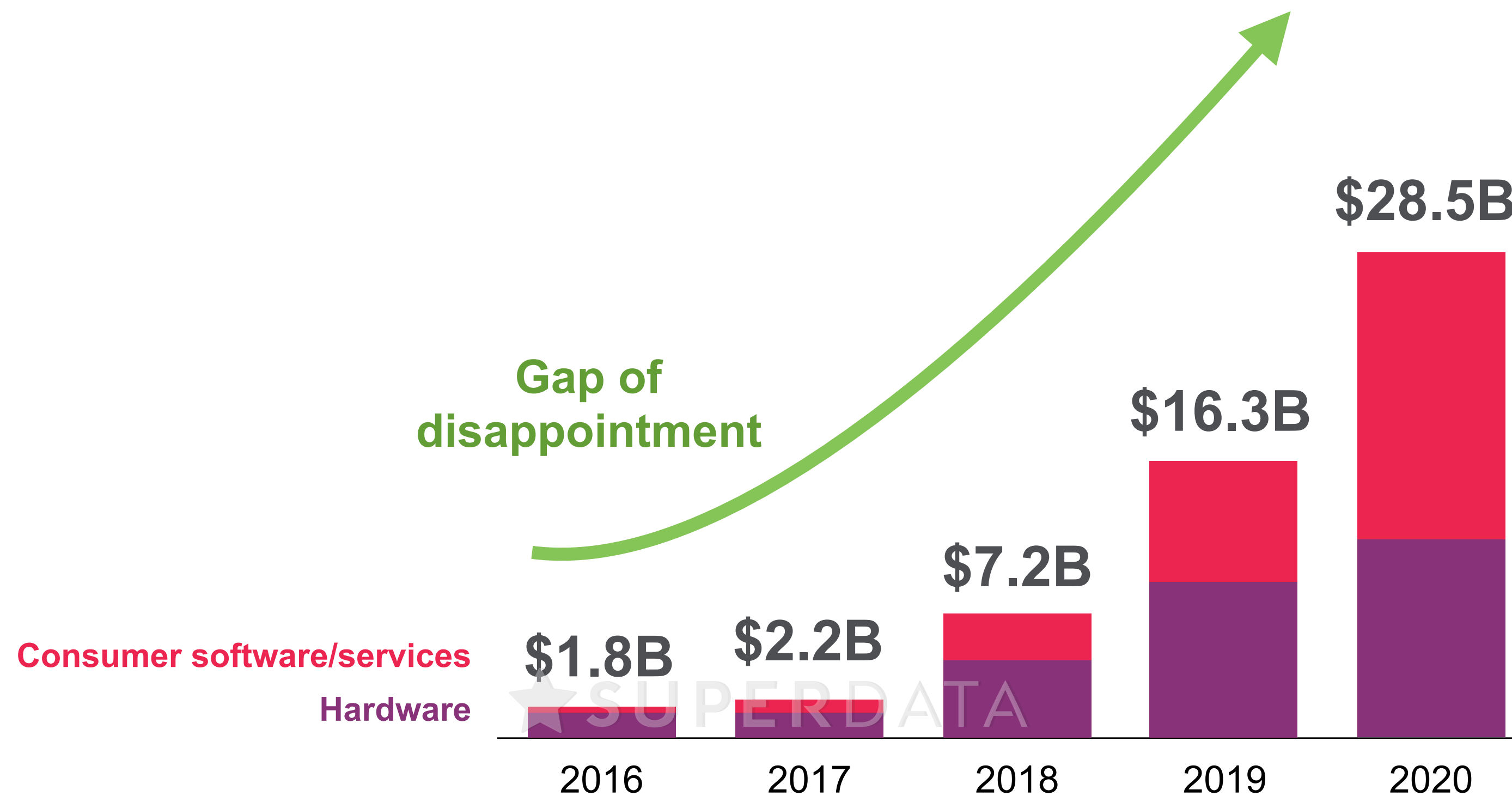
@stephinaners | @VR_Intelligence | #VRX2017

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The Virtual Market

Virtual Reality consumer revenue by segment: 2016-2020

Billions of USD, worldwide

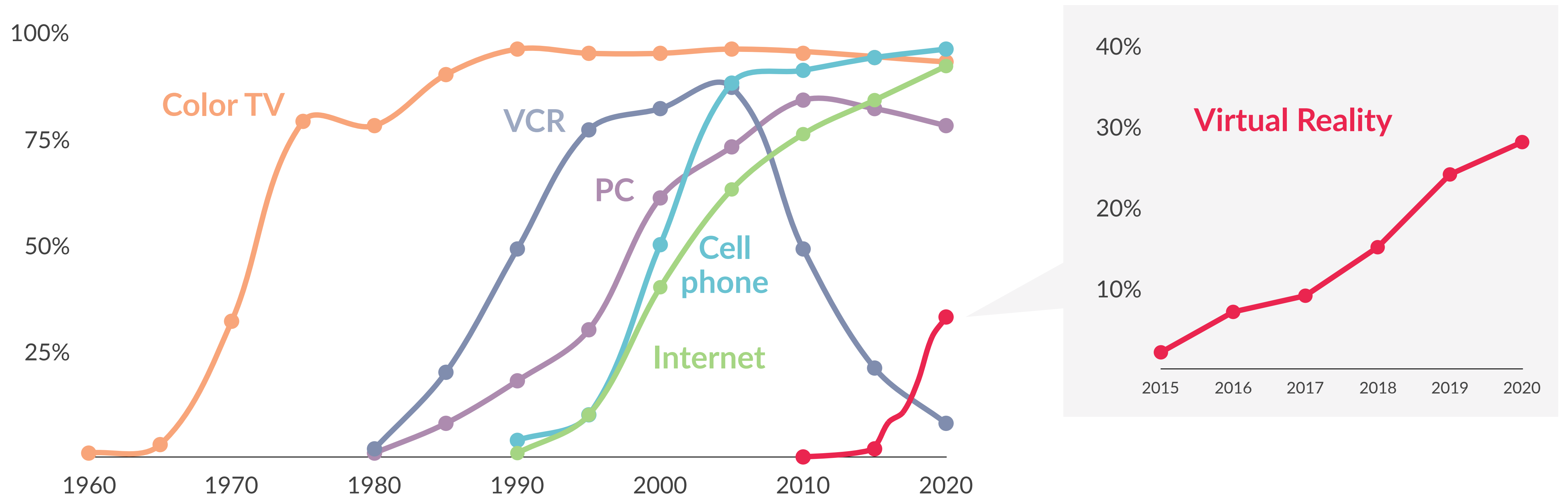


Total earnings will rise 24% from 2016 to 2017.

VR software revenue will reach \$17B by 2020, surpassing hardware earnings for the first time.

The Virtual Market

Technology adoption rates
Share of U.S. households, 1960-2020



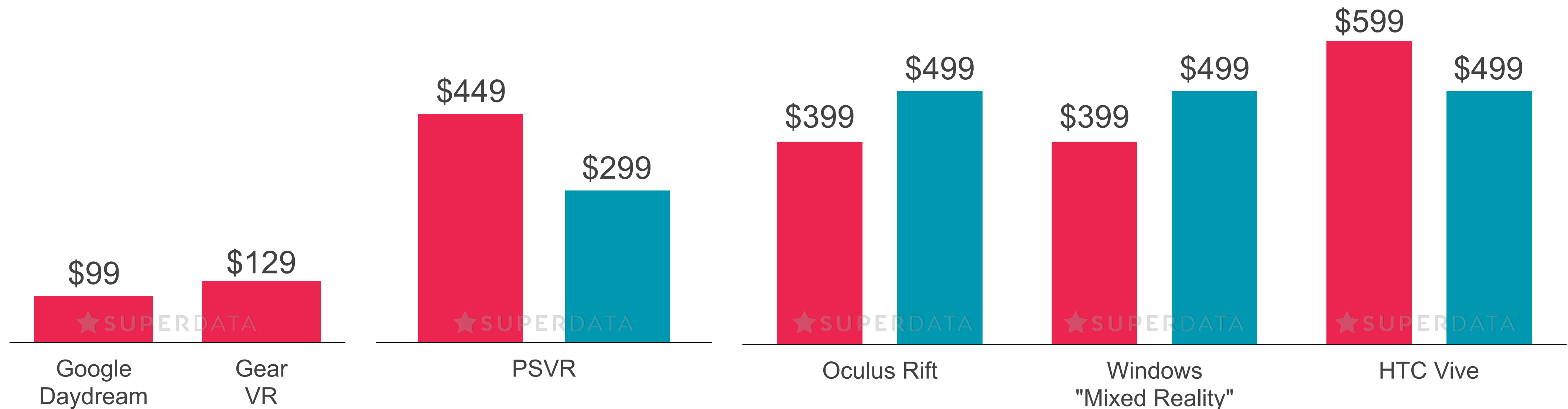
BARRIER TO ENTRY:

Price is the #1 reason for not owning a VR device¹

48%

Headset + controllers

Supporting hardware

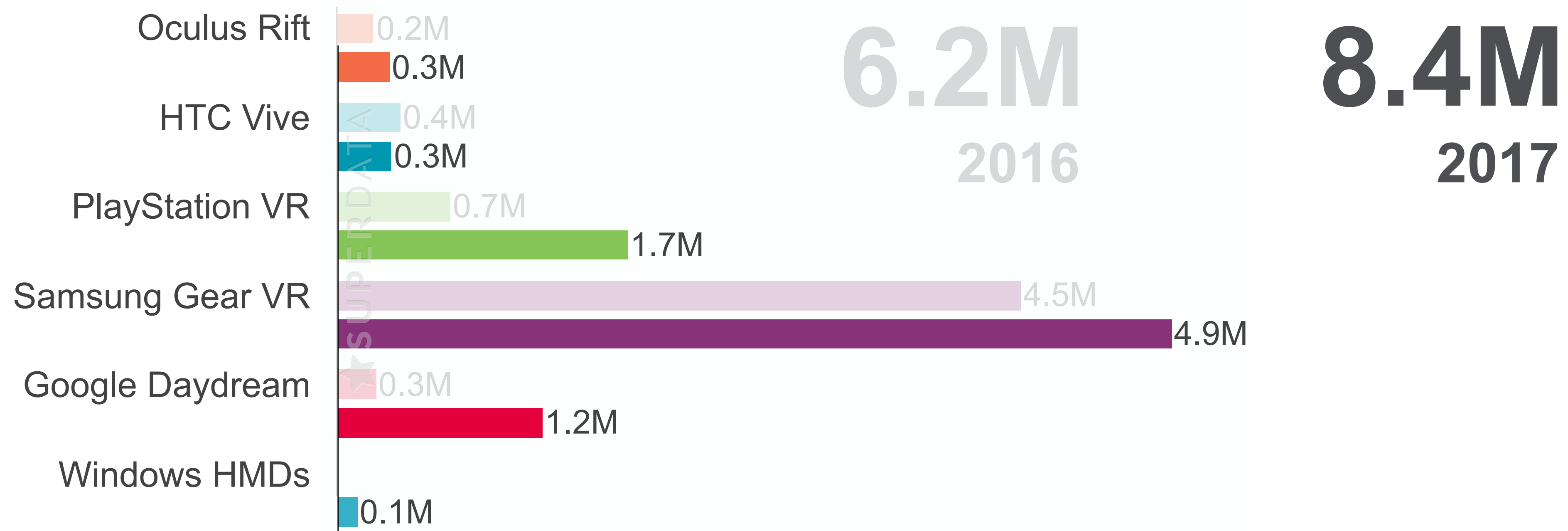


¹U.S. gamers who say the biggest reason they do not own a VR headset is because they are too expensive
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The Virtual Market

Sell-through shipments by headset: 2016 vs. 2017

Millions, worldwide



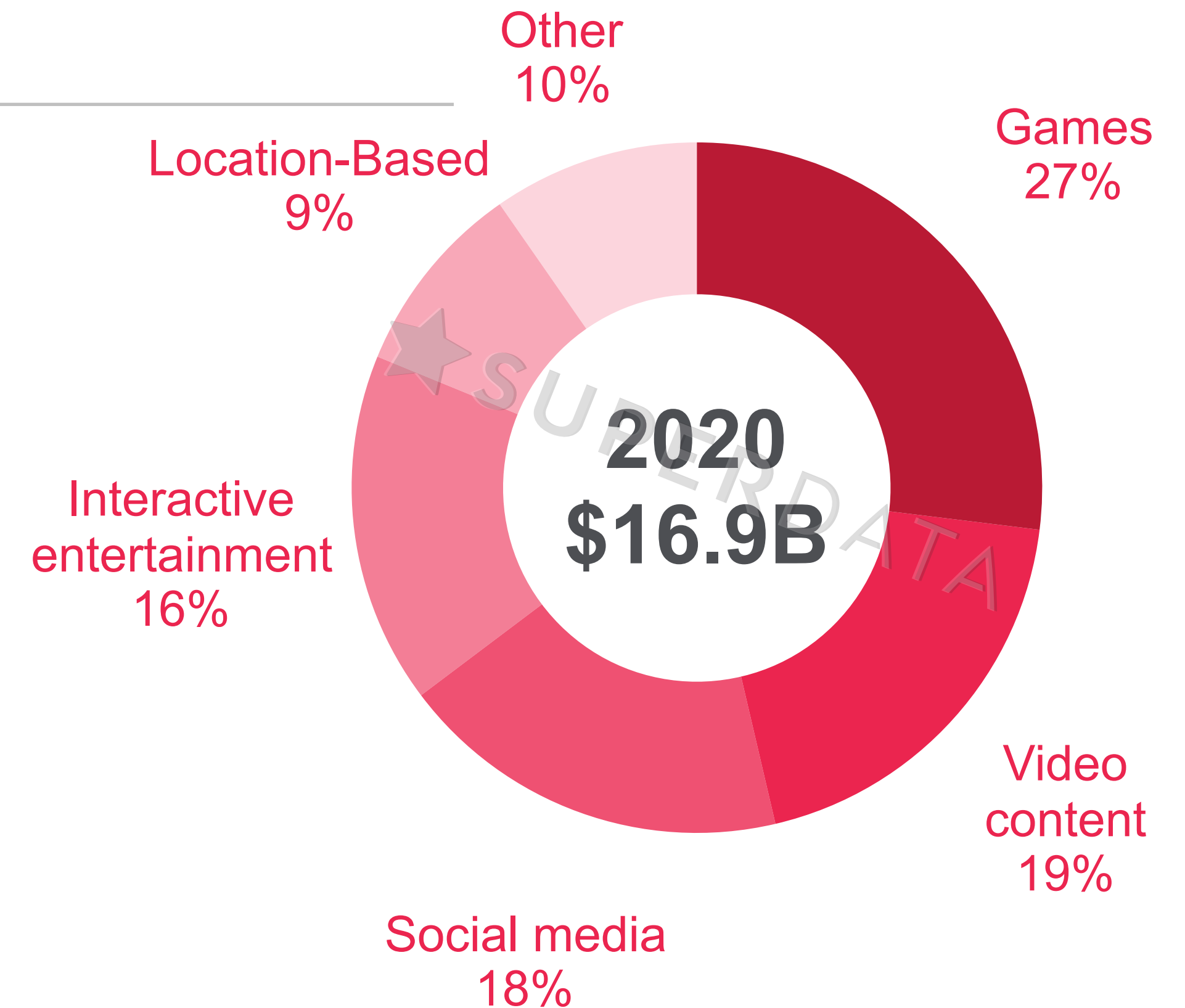
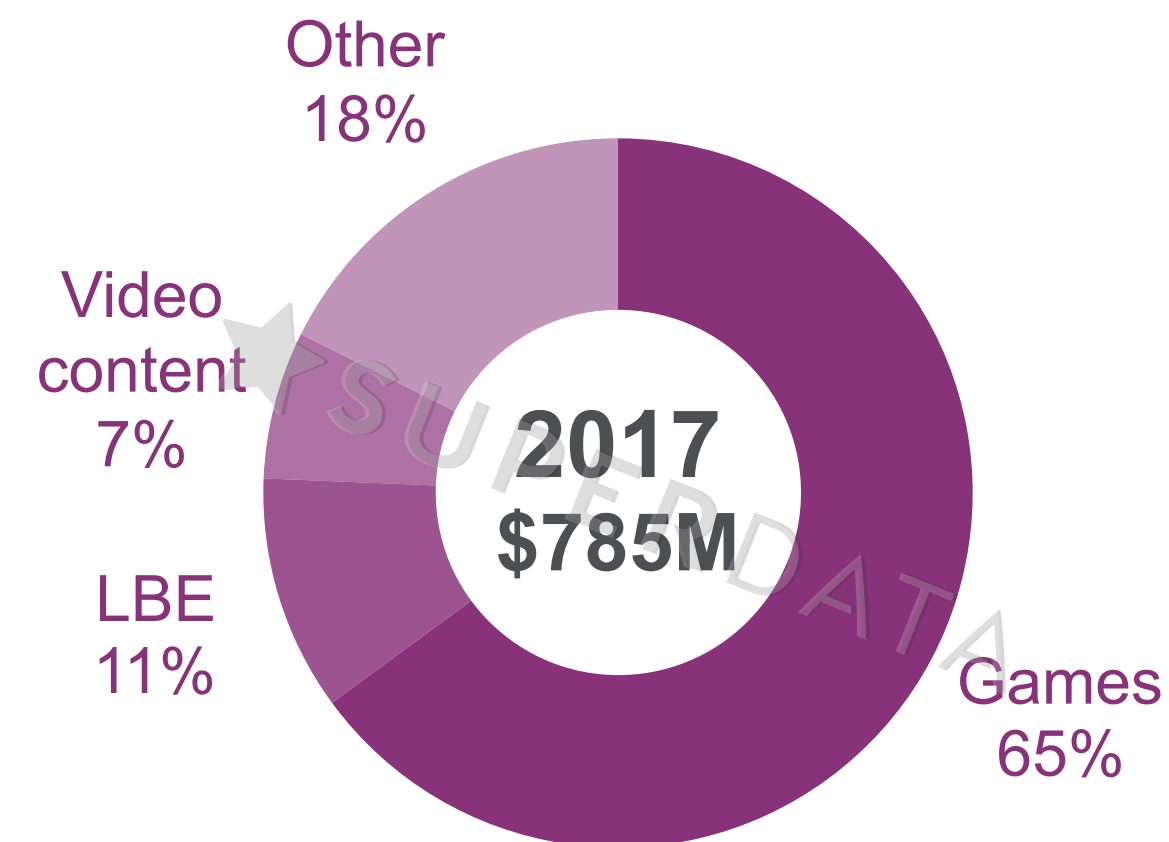
The Virtual Market

Consumer software revenue: 2016-2020

Billions of USD, worldwide

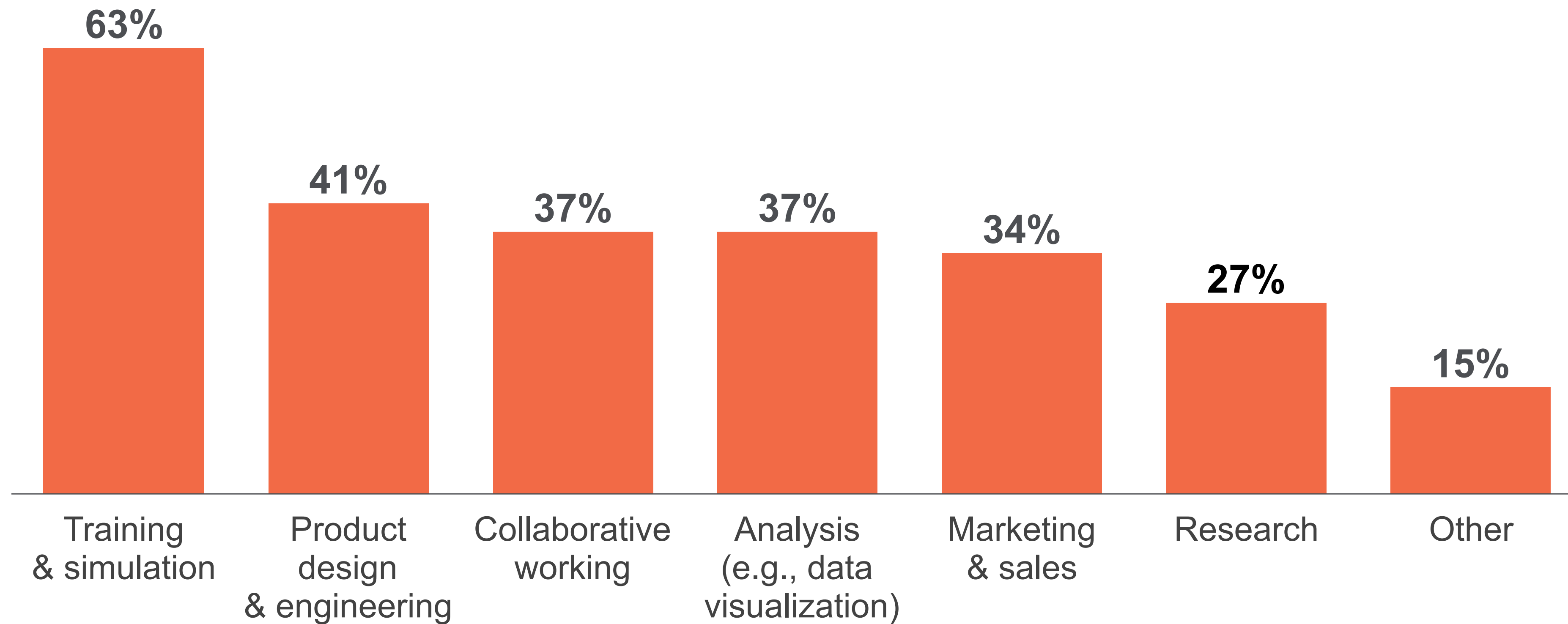
Gaming has become the primary use for VR, but Location-based experiences are gaining traction.

Video content will become the second highest-grossing software segment by 2020, earning \$3.3B.



Enterprise VR

How do enterprise end users use or plan to use VR?



VR Intelligence survey: In which of these areas do you use, or plan to use, VR in your business?

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The Immersive Market

Immersive technology consumer revenue by platform: 2016-2020
Billions of USD, worldwide

Virtual Reality vs. **Augmented Reality** vs. **Mixed Reality**

