

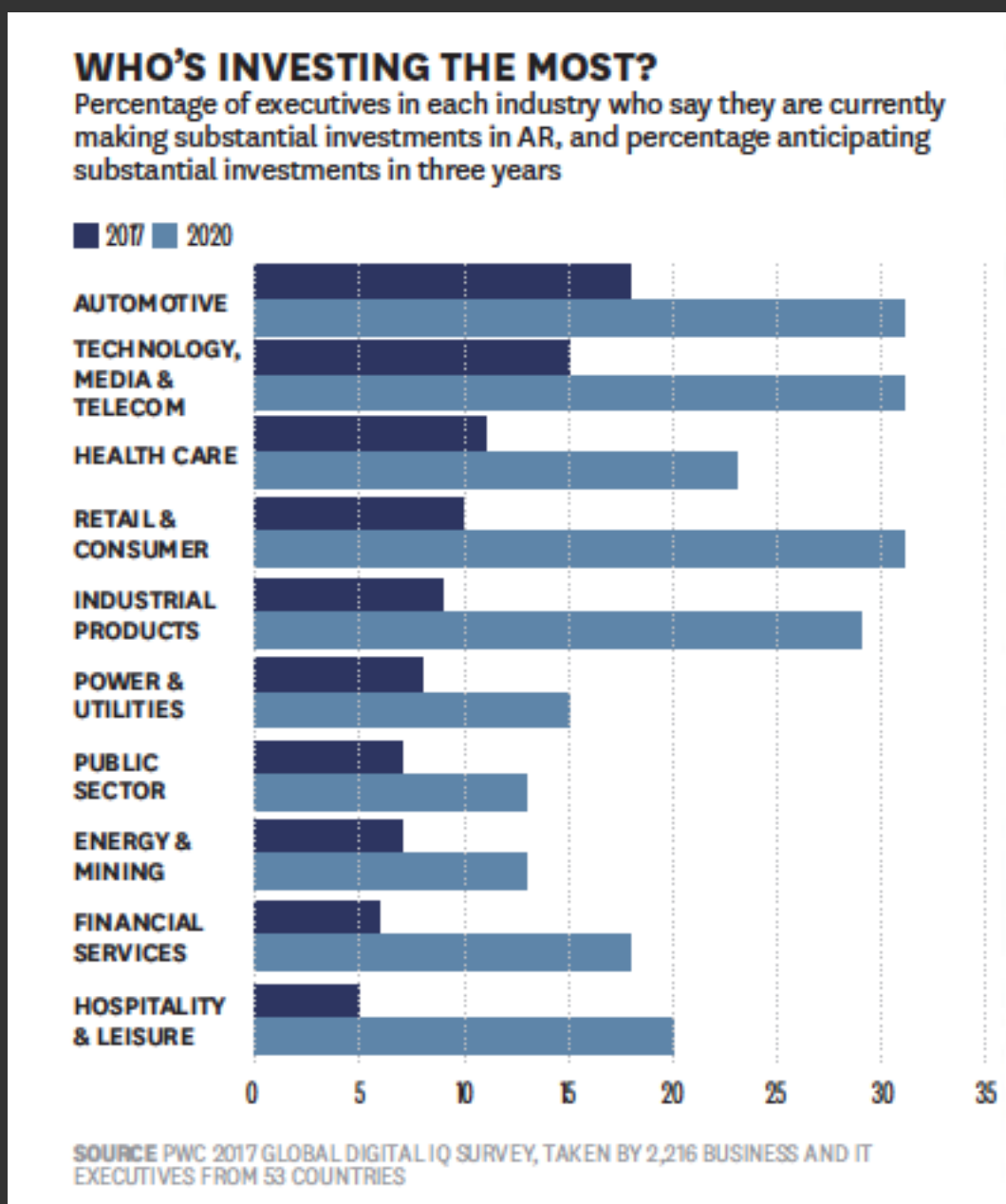
ARTILLRY DATA BRIEFS

TOP ENTERPRISE AR VERTICALS

2/05/18

One of enterprise AR's talking points is that it's broadly applicable accross a range of vertical industries. We're talking everything from energy to education. That's one reason why AR's potential market size is so big.

But how does that break down and what industries are leading AR adoption? According to a PWC Digital IQ survey (n=2216) auto ranks the highest for current adoption (17 percent) followed by Technology, media & telecom (15 percent) and Healthcare(11 percent).





These results aren't surprising, given that auto companies have a lot to gain from AR. Its value chain has many points where AR adds value — everything from design to manufacturing to retail. The latter involves customers that can visualize car options using AR, like BMW's iVisualizer app.

The only surprising part about these findings is the lower adoption of some of the industries we often see cited as examples of AR adoption. Power & utilities, energy & mining and industrial products are all manufacturing-heavy or involving field work where remote AR assistance is fitting.

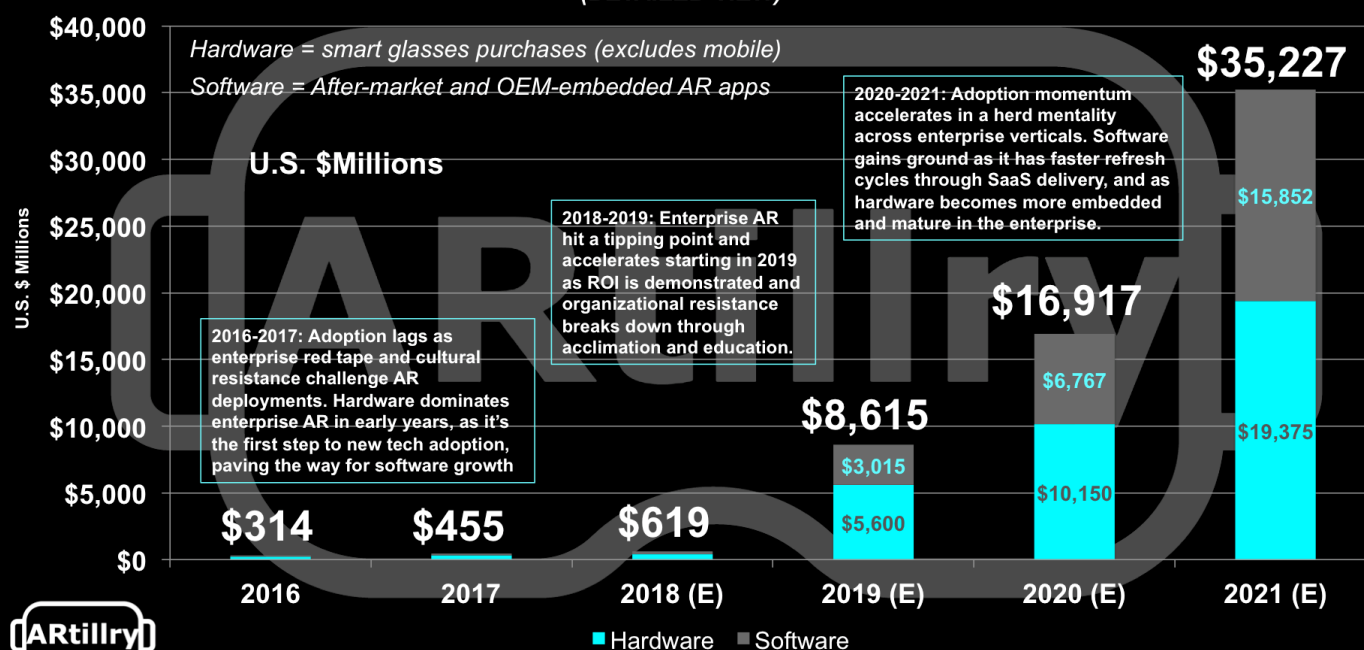
Drilling deeper, what are the actual job roles where AR adoption is happening? According to a PTC survey of its Thingworx customers, the top AR use case is in service (reference and remote assistance), followed by manufacturing (assembly instructions) and sales & marketing.

These findings are likewise logical without too many surprises, but it validates a lot of the points we've been making about where AR will add the most value in the enterprise. We expect training will move up the list though, currently one of the lowest areas of adoption according to the survey.

ARtillry is in the process of producing its January Intelligence Briefing, which will focus on enterprise AR. Who's using it? Where is it working? What are the adoption/implementation challenges? And what are the biggest takeaways for XR players vetting opportunities? Stay tuned.

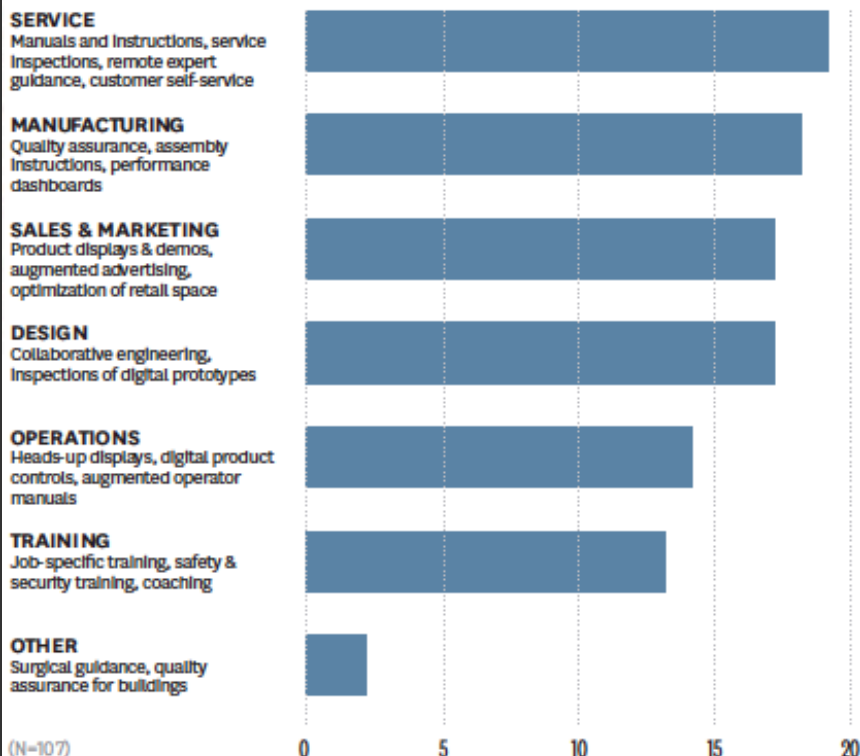
ENTERPRISE AR: HARDWARE & SOFTWARE

(DETAILED VIEW)



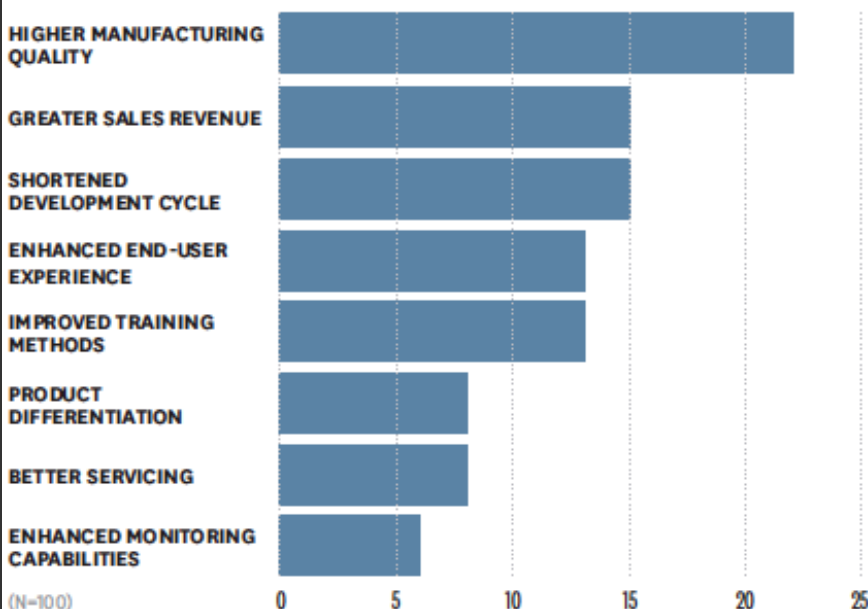
ENTERPRISE ROLES...

Percentage of surveyed developers creating AR experiences in each use category



...AND STRATEGIC GOALS

Percentage of respondents citing each reason as the primary goal of their AR development program



SOURCE PTC SURVEY OF THINGWORX STUDIO PILOT PROGRAM PARTICIPANTS

About ARtillery Intelligence

ARtillery is a publication and intelligence firm that examines augmented reality and virtual reality, collectively known as XR. Through writings, data and multimedia, it provides deep and analytical views into the industry's biggest players and opportunities. It's about insights, not cheerleading.

Run by career analyst and journalist Mike Boland, coverage is grounded in a disciplined and journalistic approach. It also maintains a business angle: Though fun and games permeate VR and AR (especially the former) long-term cultural, technological and financial implications are primary.

Learn more at <https://artillery.co/about>



About the Author

Mike Boland was one of Silicon Valley's first tech reporters of the Internet age, as a staff reporter for *Forbes* (print) starting in 2000. He has been an industry analyst covering mobile and social media since 2005, and is now Chief Analyst of *ARtillery Intelligence*, covering emerging tech.

Mike is a frequent speaker at industry conferences such as VRLA, ad:tech and LeadsCon. He has authored in-depth reports and market-sizing forecasts on the changing tech & media landscape. He contributes regularly to highly read online news sources such as *TechCrunch*, *Business Insider* and the *Huffington Post*.

A trusted source for tech journalists, his comments have appeared in A-list publications, including *The New Yorker*, *The Wall Street Journal* and *The New York Times*.

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Questions and requests for deeper analysis can be submitted at:

<https://artillery.co/contact/>



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