



ROBOTS AMONG US™

# Survey Insights: Virtual Reality

October 2020



Overview & Survey Thoughts

Virtual Reality Movie

Virtual Reality Gaming

Virtual Reality Travel/Tourism

Virtual Reality Wellness Session

Virtual Reality Headset

Virtual Reality Education

Virtual Reality Workspace

Virtual Reality Workplace Training

Virtual Reality Call with Family/Friends

Virtual Reality Workplace

Survey Methodology



# Virtual Reality

Category Results



# Survey Thoughts

## When we can relate to a virtual reality experience, we're more favourable

When asked about Virtual Reality Headsets in isolation, 26% of respondents expressed active comfort (14% strongly agree – 26% total agree). However, respondents felt more comfortable when asked about situational uses of Virtual Reality technology. For example, Virtual Reality Gaming (16% strongly agree – 32% total agree), Virtual Reality Calls with family and friends (15% strongly agree – 30% total agree), and Virtual Reality Movies (15% strongly agree – 30% total agree).

There was a relatively narrow spread in the comfort level of virtual reality technologies (5% difference in strongly agree); Virtual Reality Gaming was the most desirable (16% strongly agree – 32% total agree) and Virtual Reality Travel and Tourism was the least desirable (11% strongly agree – 21% total agree). The Augmented Reality (19% difference in strongly agree) and Retail (31% difference in strongly agree) surveys had much more significant spreads between the most desirable and least desirable technologies surveyed.

## We're not yet ready for Virtual Reality Travel and Tourism experiences

Most of the virtual reality technologies surveyed ranked relatively desirable compared to other technologies surveyed. However, Virtual Reality Travel and Tourism was seen as more undesirable (11% strongly agree – 21% total agree) compared to the average comfort level with virtual reality technology (13% strongly agree – 27% total agree).

## We prefer Virtual Reality in our personal lives rather than the workplace

Virtual reality technology in our personal lives, such as gaming and movies, was considered more desirable than Virtual reality technology in the workplace. For example, Virtual Reality Gaming had a 32% comfort level compared to Virtual Reality Workplaces with a 24% comfort level.





# Survey Thoughts

## Comfort with Virtual Reality Headsets has remained consistent this year

26% of respondents expressed active comfort with Virtual Reality Headsets, as compared to 25% in our earlier May survey.

## Men are leading the increasing favourability of virtual reality technology

For all of the virtual reality technologies surveyed, male respondents indicated that they are more comfortable than female respondents. For example, Virtual Reality Gaming (39% vs 26% comfort level), Virtual Reality Movies (35% vs 27% comfort level), Virtual Reality Headsets (30% vs 22% comfort level), and Virtual Reality Workplaces (30% vs 20% comfort level).

## Younger generations are embracing Virtual Reality Headsets

There was a pronounced comfort with Virtual Reality Headsets beginning with the youngest demographics and then declining in age. There was a similar demographic trend with Virtual Reality Gaming. We also saw that the 18-24, 25-34, and 35-44 demographics are significantly more favourable to Virtual Reality Education as compared to their older peers.

## The demographic 25-34 seems the sweet spot for Virtual Reality Calling technology

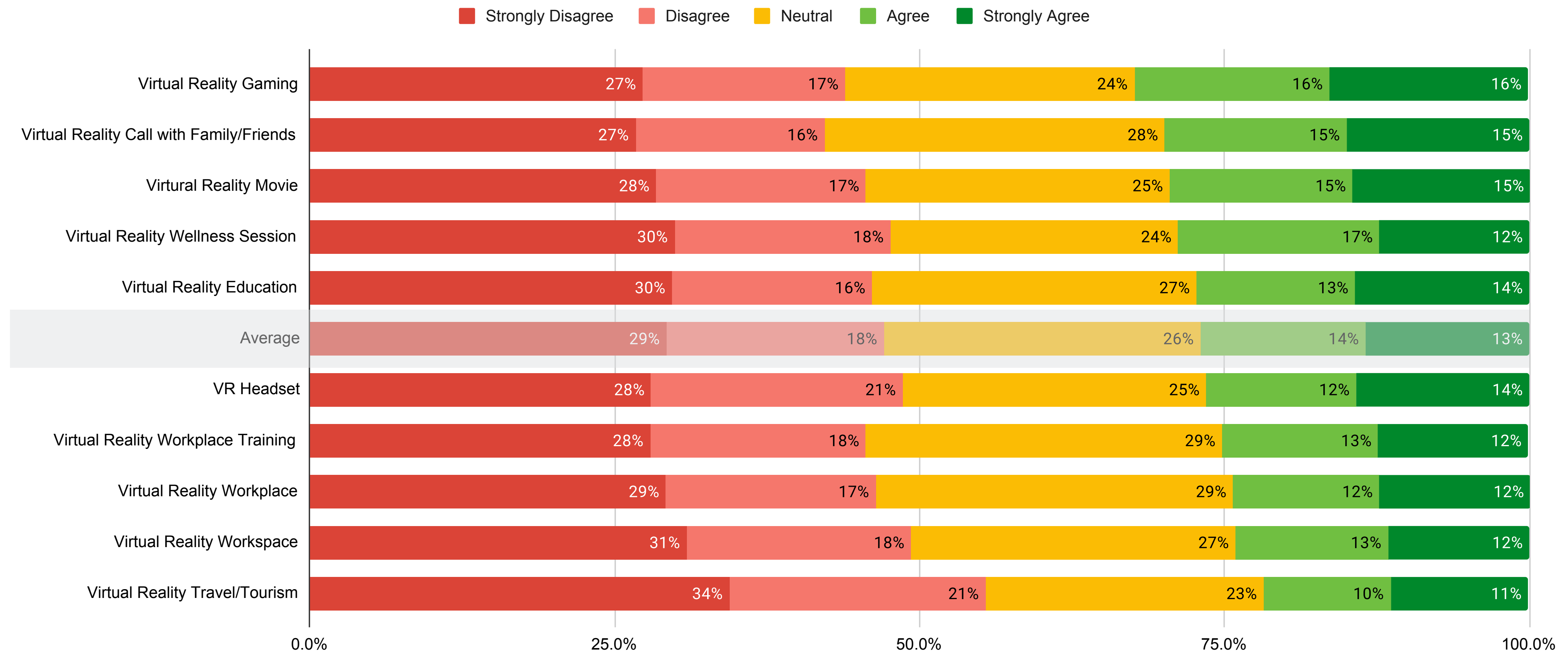
Individuals aged 25-34 are more favourable to Virtual Reality Calling technology as compared to their older and younger peers. However, they are the least favourable to Virtual Reality Travel and Tourism.

## Virtual Reality Workplace technology plays well to those aged 35-44 and 45-54

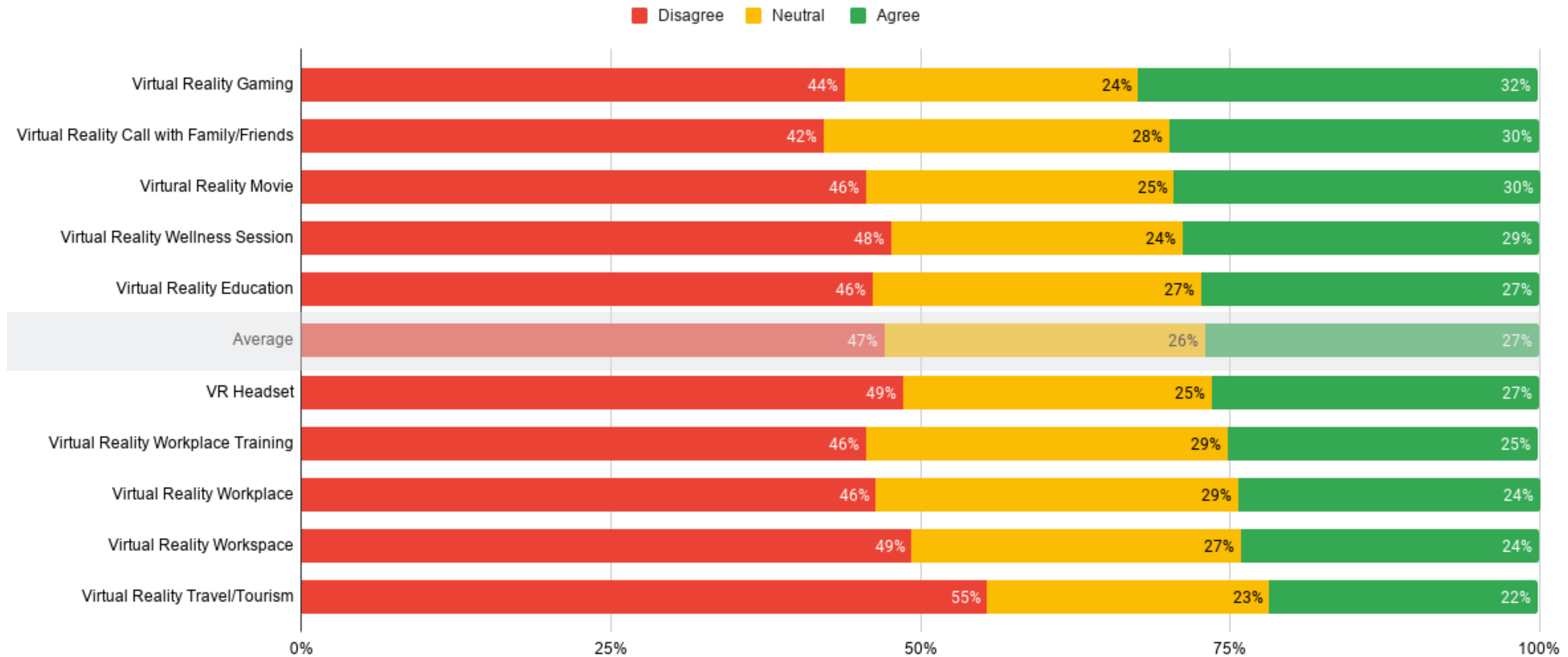
Individuals aged 35-54 are significantly more favourable to Virtual Reality Workplace technology as compared to their older and younger peers.



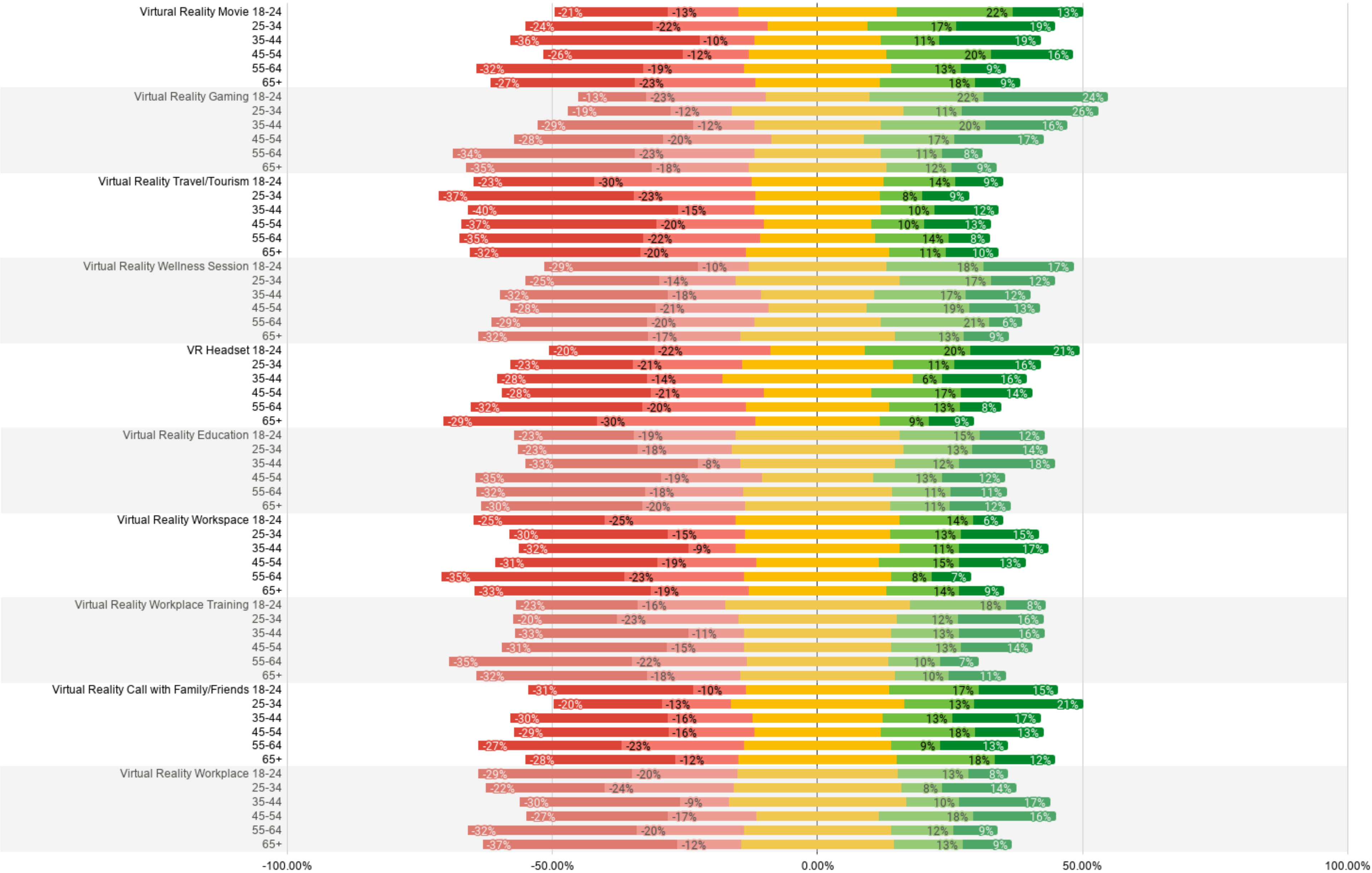
# Virtual Reality



# Virtual Reality



Technology Breakdown by Age Group





Age Breakdown by Technology

18 - 24

- Virtual Reality Movie
- Virtual Reality Gaming
- Virtual Reality Travel/Tourism
- Virtual Reality Wellness Session
- VR Headset
- Virtual Reality Education
- Virtual Reality Workspace
- Virtual Reality Workplace Training
- Virtual Reality Call with Family/Friends
- Virtual Reality Workplace

25 - 34

- Virtual Reality Movie
- Virtual Reality Gaming
- Virtual Reality Travel/Tourism
- Virtual Reality Wellness Session
- VR Headset
- Virtual Reality Education
- Virtual Reality Workspace
- Virtual Reality Workplace Training
- Virtual Reality Call with Family/Friends
- Virtual Reality Workplace

35 - 44

- Virtual Reality Movie
- Virtual Reality Gaming
- Virtual Reality Travel/Tourism
- Virtual Reality Wellness Session
- VR Headset
- Virtual Reality Education
- Virtual Reality Workspace
- Virtual Reality Workplace Training
- Virtual Reality Call with Family/Friends
- Virtual Reality Workplace

45 - 54

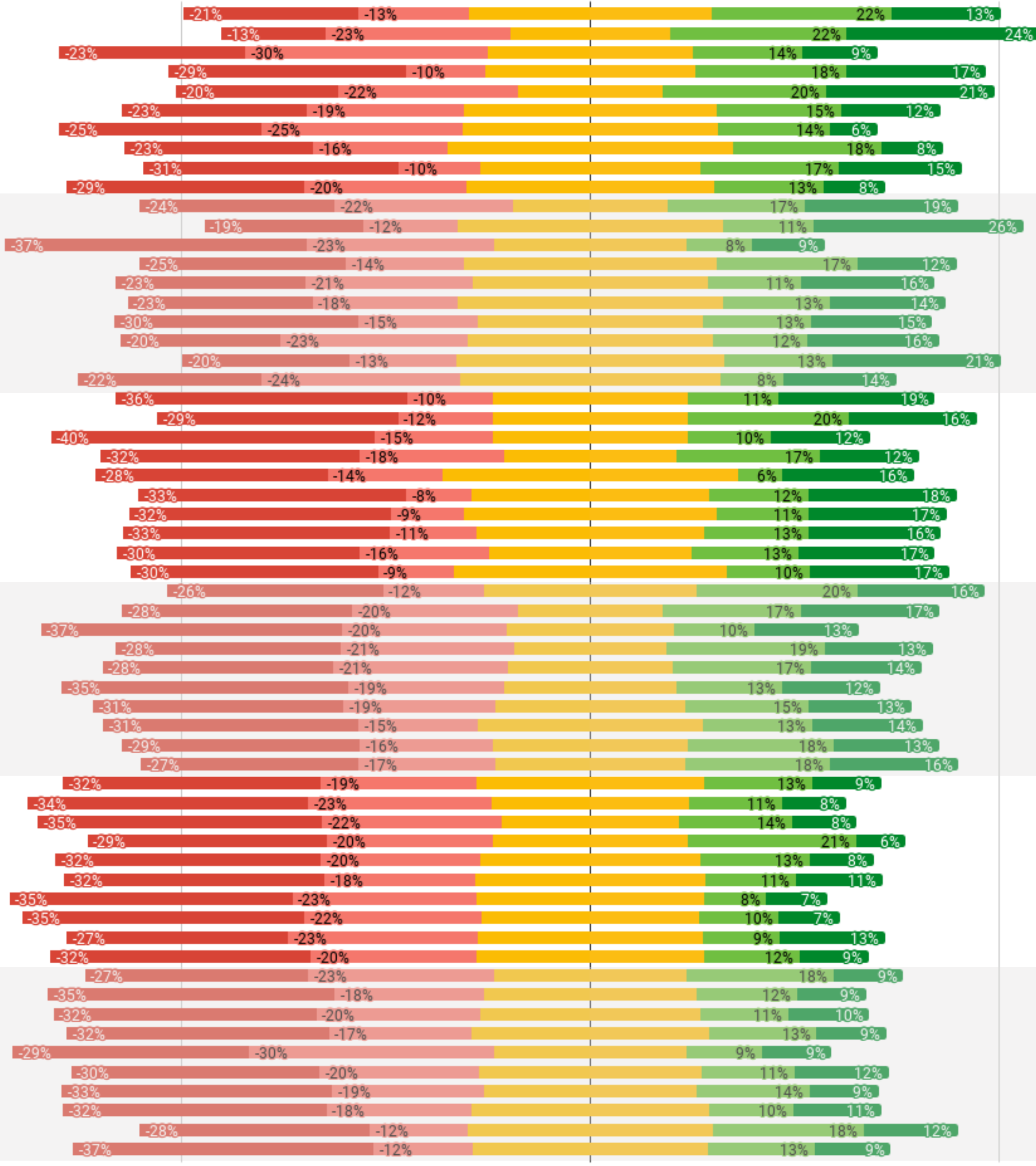
- Virtual Reality Movie
- Virtual Reality Gaming
- Virtual Reality Travel/Tourism
- Virtual Reality Wellness Session
- VR Headset
- Virtual Reality Education
- Virtual Reality Workspace
- Virtual Reality Workplace Training
- Virtual Reality Call with Family/Friends
- Virtual Reality Workplace

55 - 64

- Virtual Reality Movie
- Virtual Reality Gaming
- Virtual Reality Travel/Tourism
- Virtual Reality Wellness Session
- VR Headset
- Virtual Reality Education
- Virtual Reality Workspace
- Virtual Reality Workplace Training
- Virtual Reality Call with Family/Friends
- Virtual Reality Workplace

65+

- Virtual Reality Movie
- Virtual Reality Gaming
- Virtual Reality Travel/Tourism
- Virtual Reality Wellness Session
- VR Headset
- Virtual Reality Education
- Virtual Reality Workspace
- Virtual Reality Workplace Training
- Virtual Reality Call with Family/Friends
- Virtual Reality Workplace



-100%

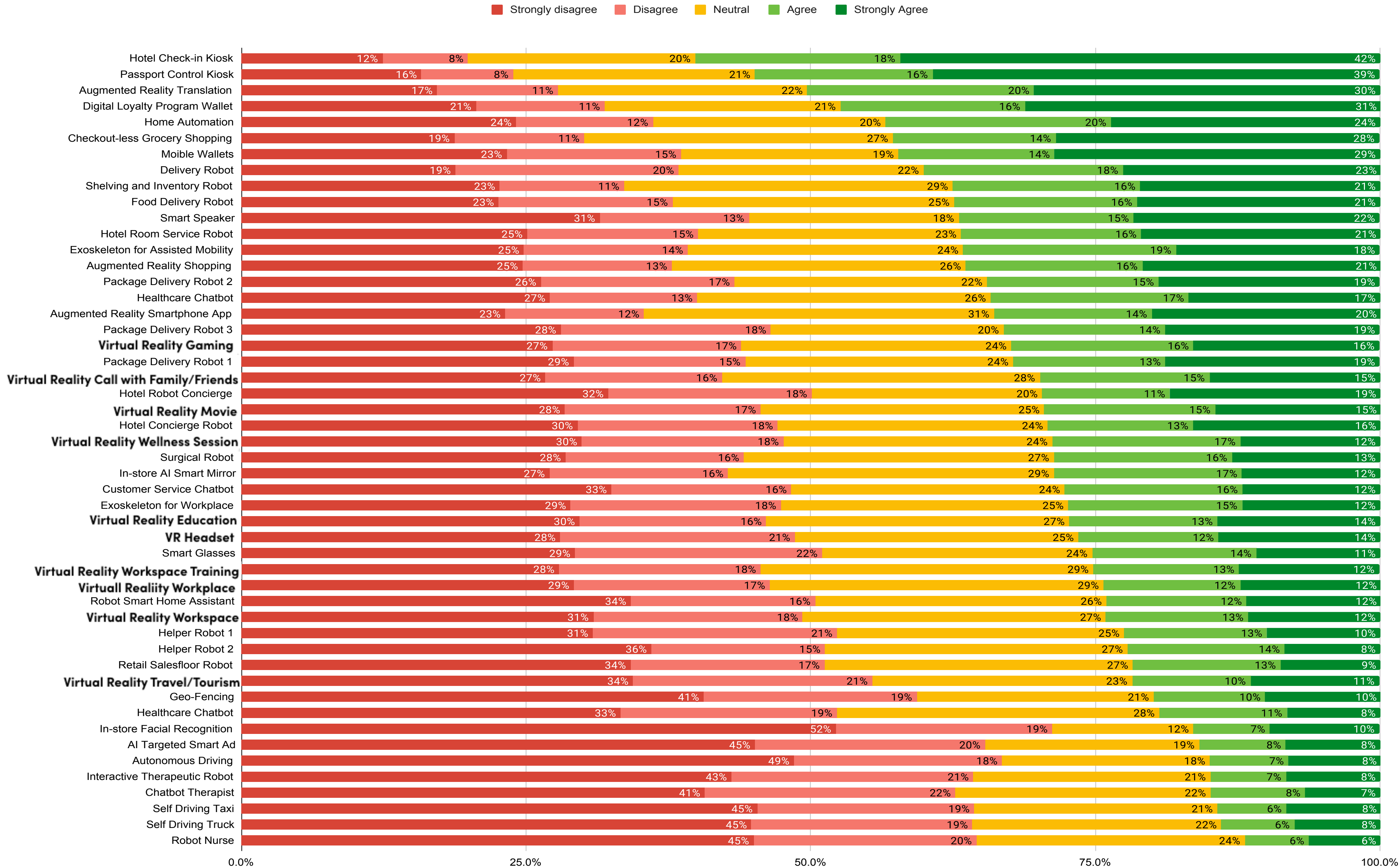
-50%

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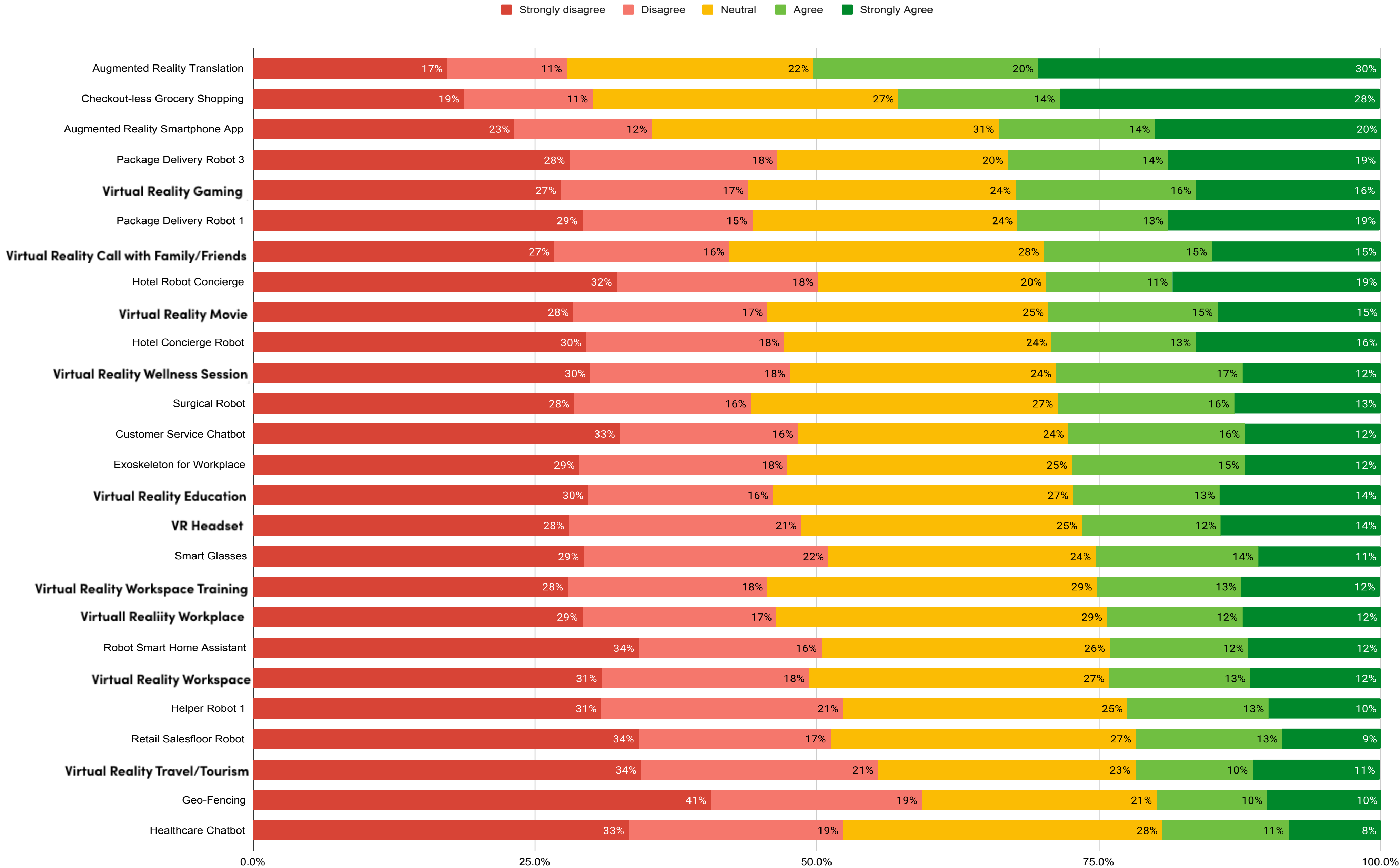
50%

100%

# Consolidated View of All Technologies Surveyed



# Focused View of Virtual Reality with other Comparable Technologies







# Virtual Reality Movie

Virtual Reality Technologies



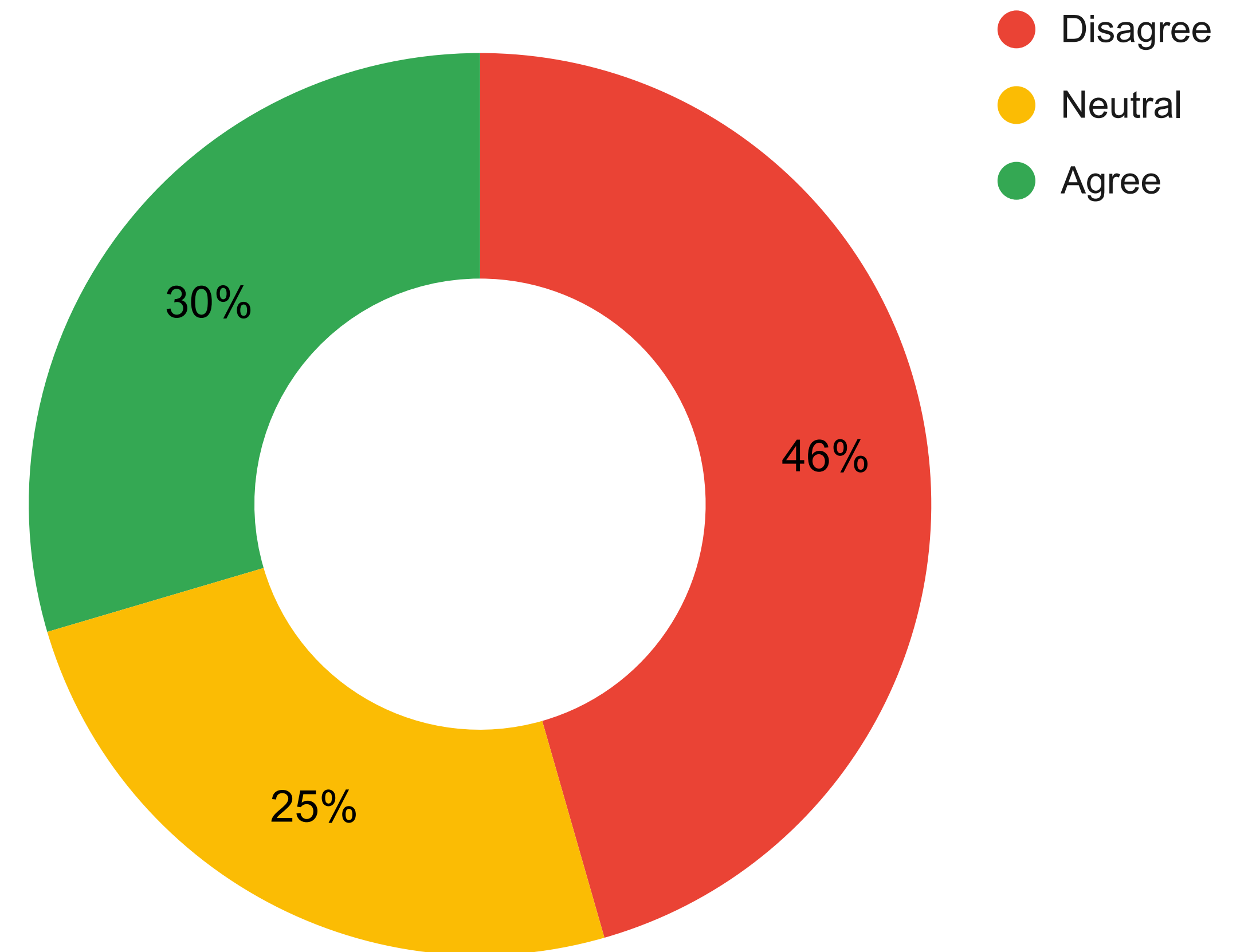




# Virtual Reality Movie

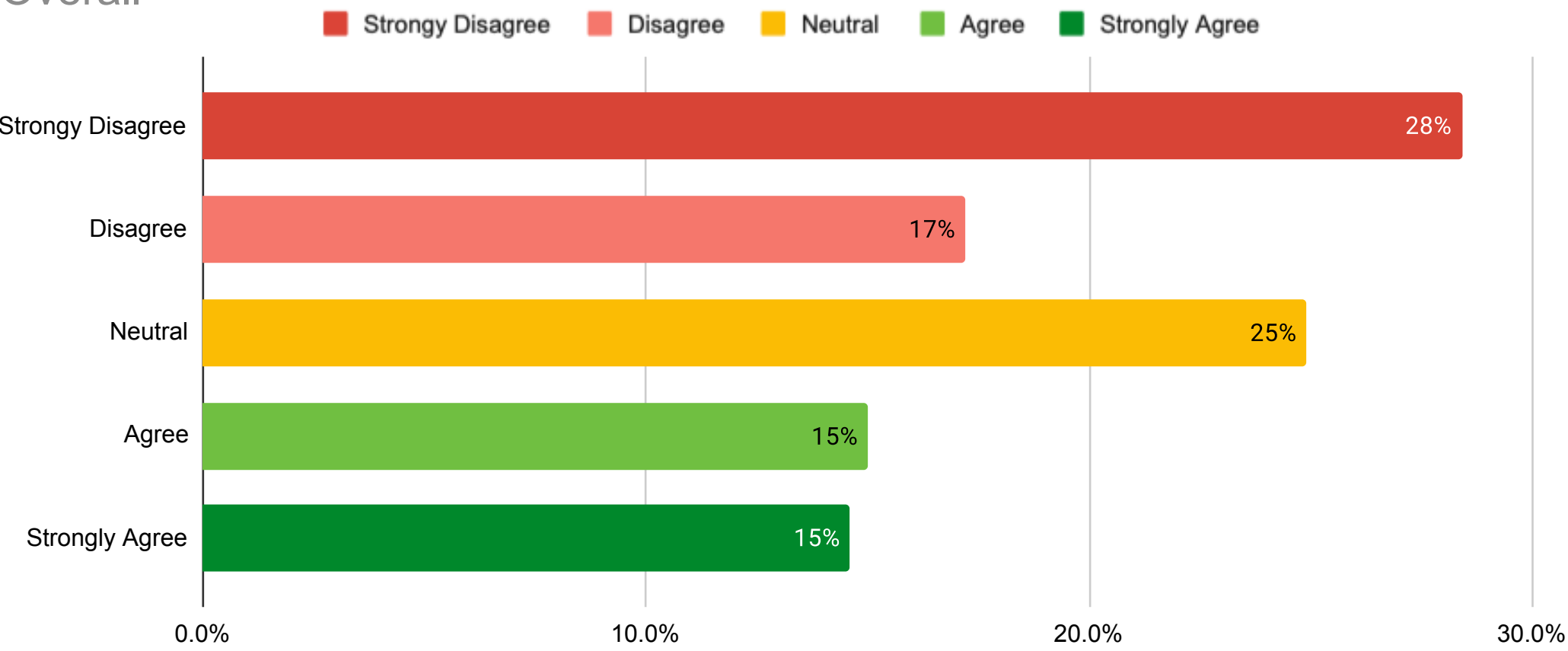
30% of respondents feel comfortable interacting with **Virtual Reality Movie**

*(% of respondents who strongly agreed or agreed with the statement: "I feel comfortable interacting with this technology")*

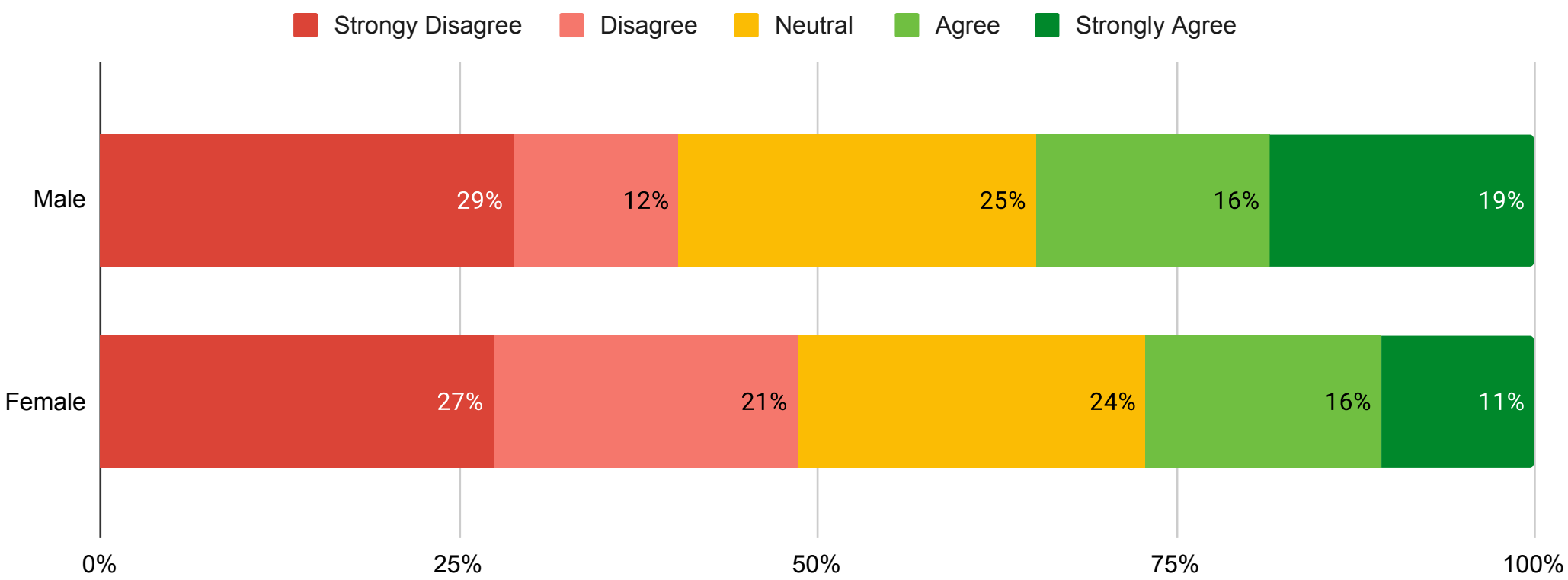




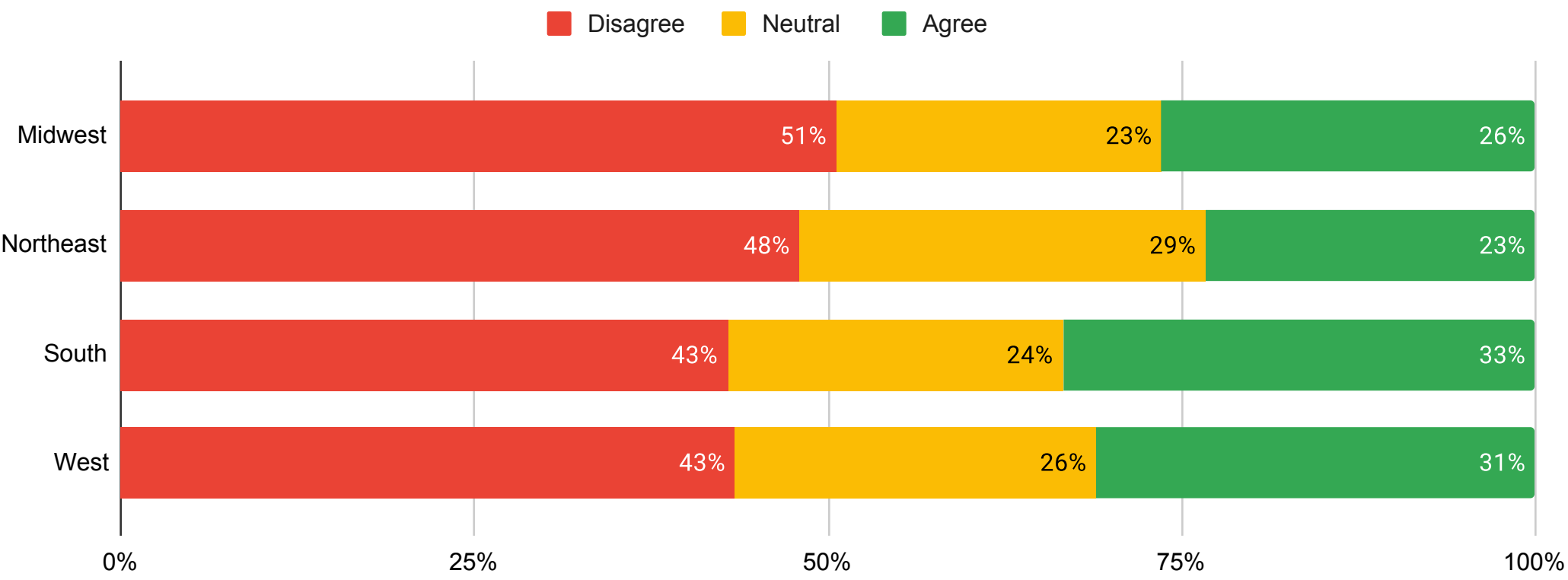
Overall



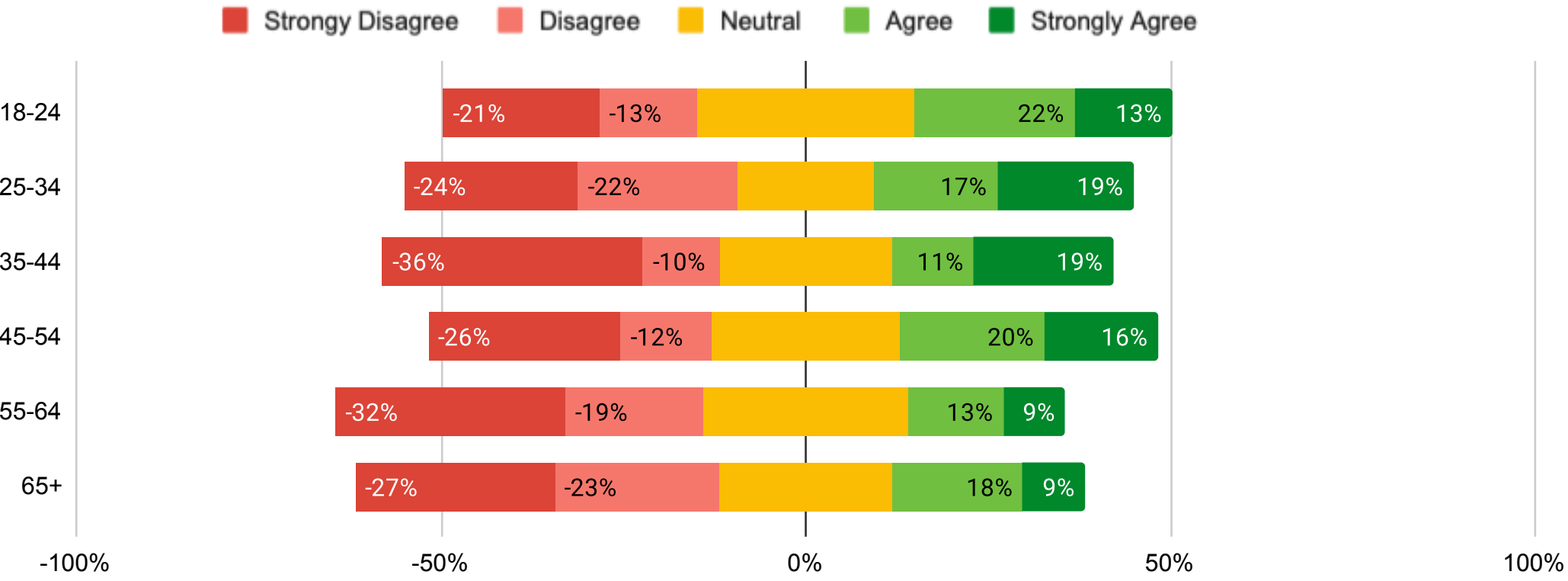
Gender Breakdown



Region Breakdown



Age Breakdown





# Virtual Reality Gaming

Virtual Reality Technologies

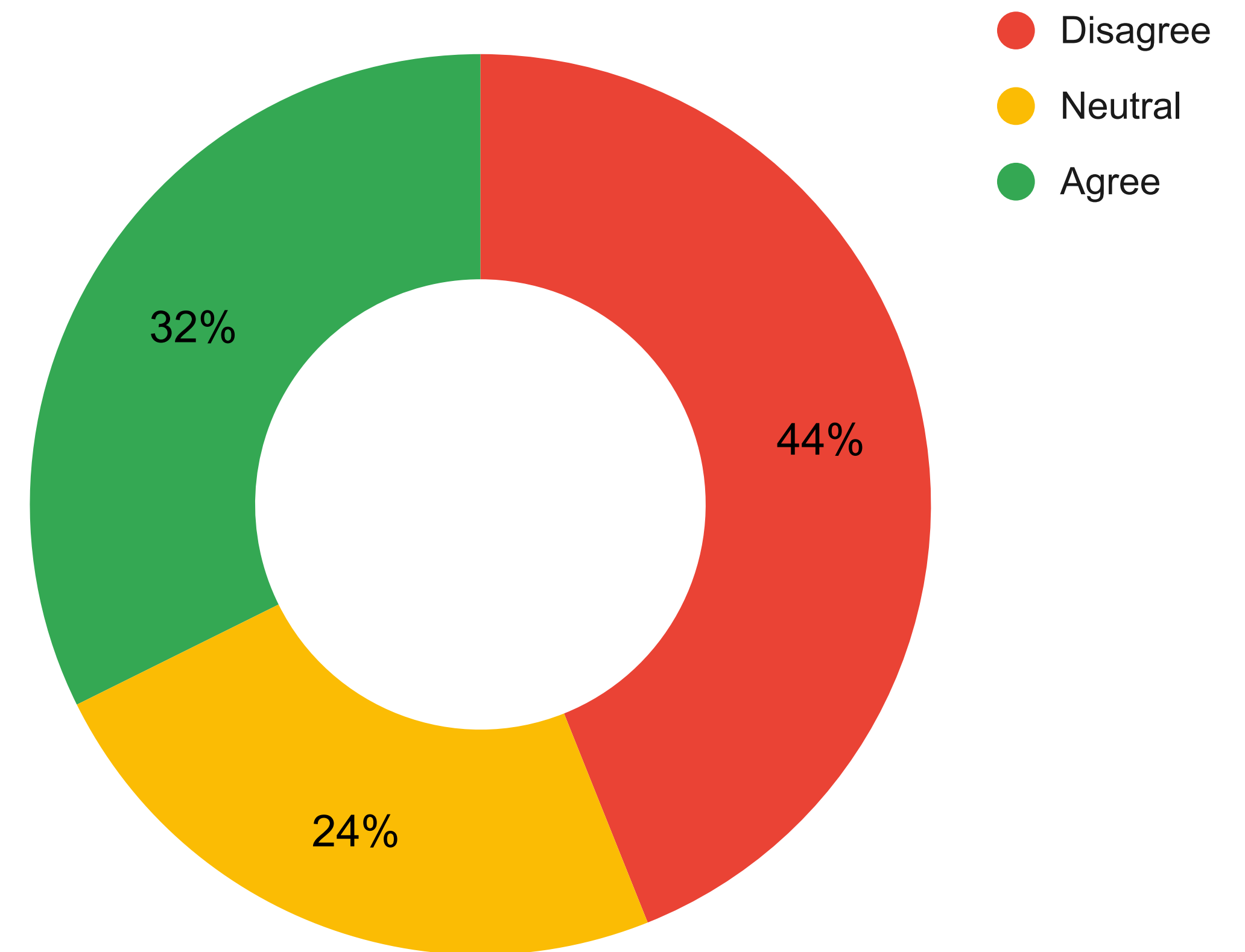




# Virtual Reality Gaming

32% of respondents feel comfortable interacting with **Augmented Reality Gaming**

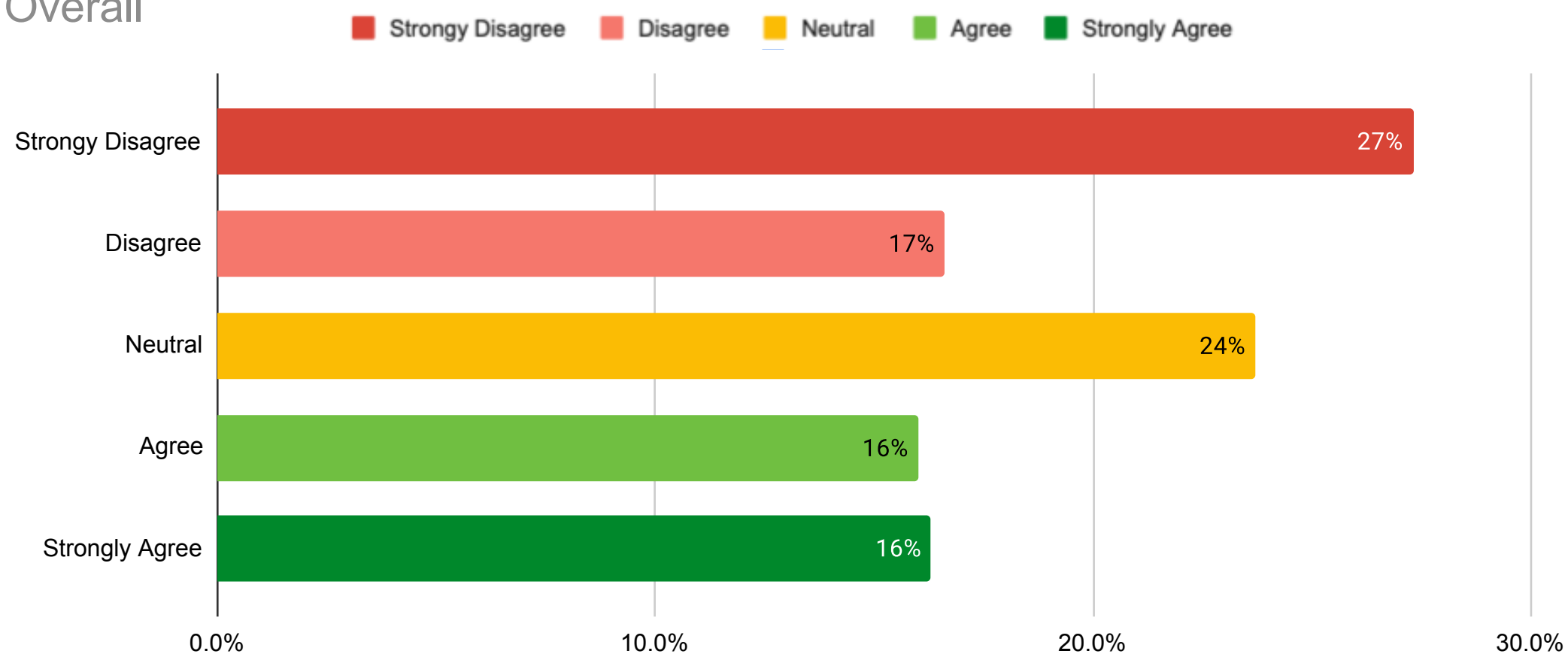
*(% of respondents who strongly agreed or agreed with the statement: "I feel comfortable interacting with this technology")*



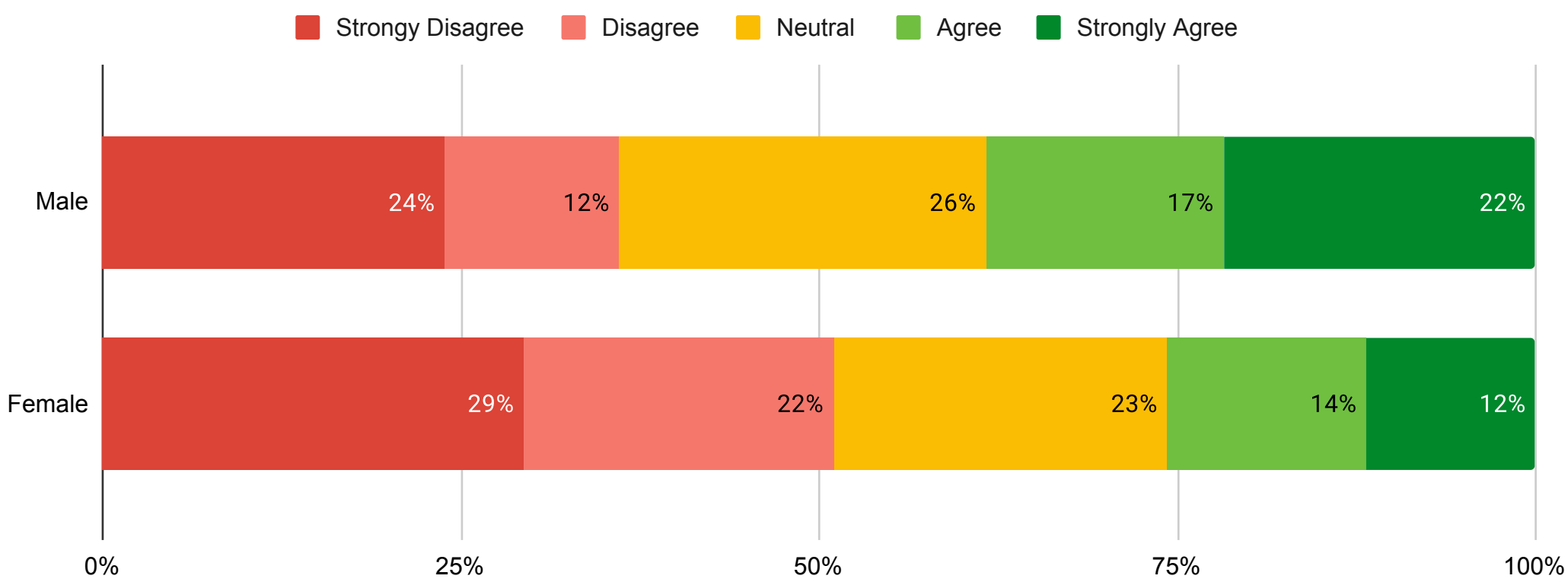




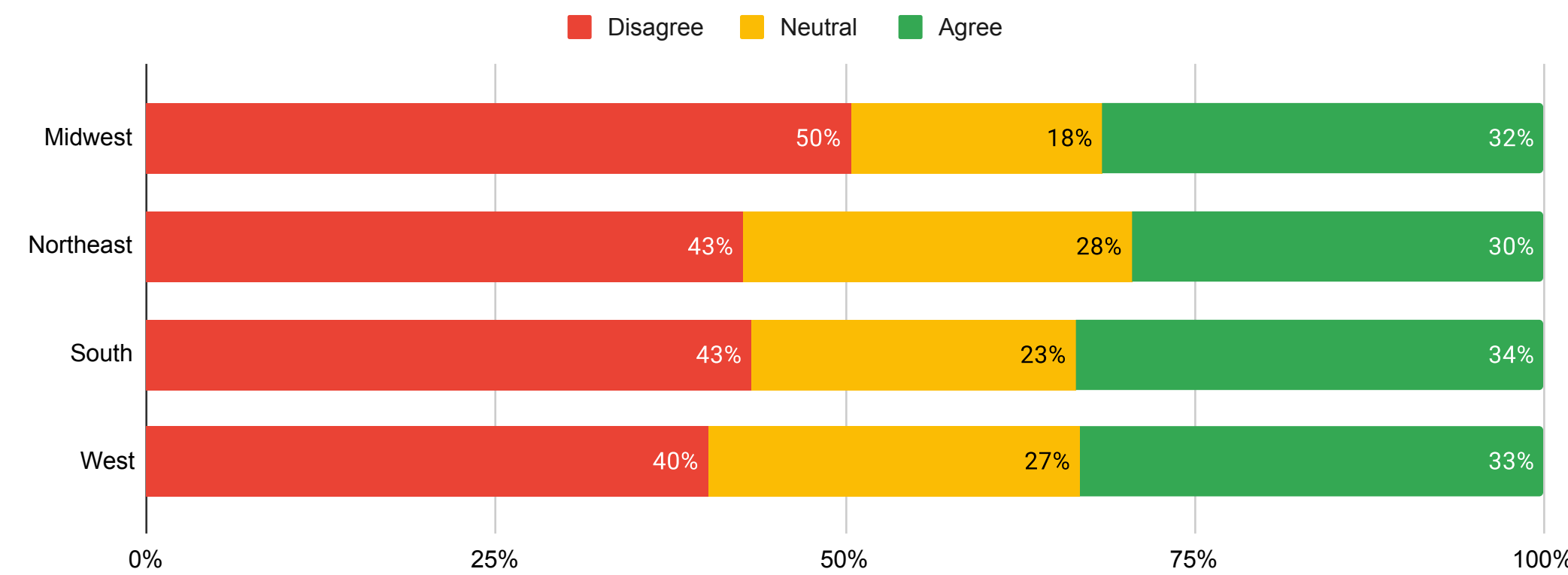
Overall



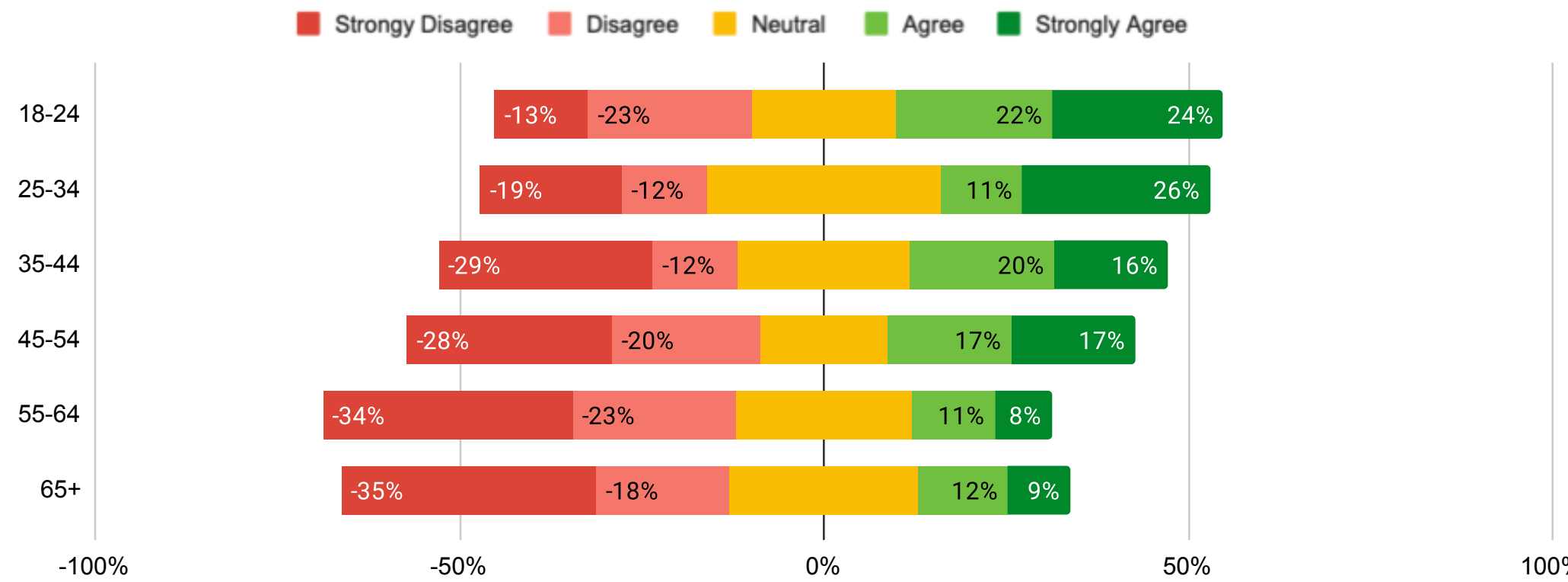
Gender Breakdown



Region Breakdown



Age Breakdown





# Virtual Reality Travel/Tourism

Virtual Reality Technologies

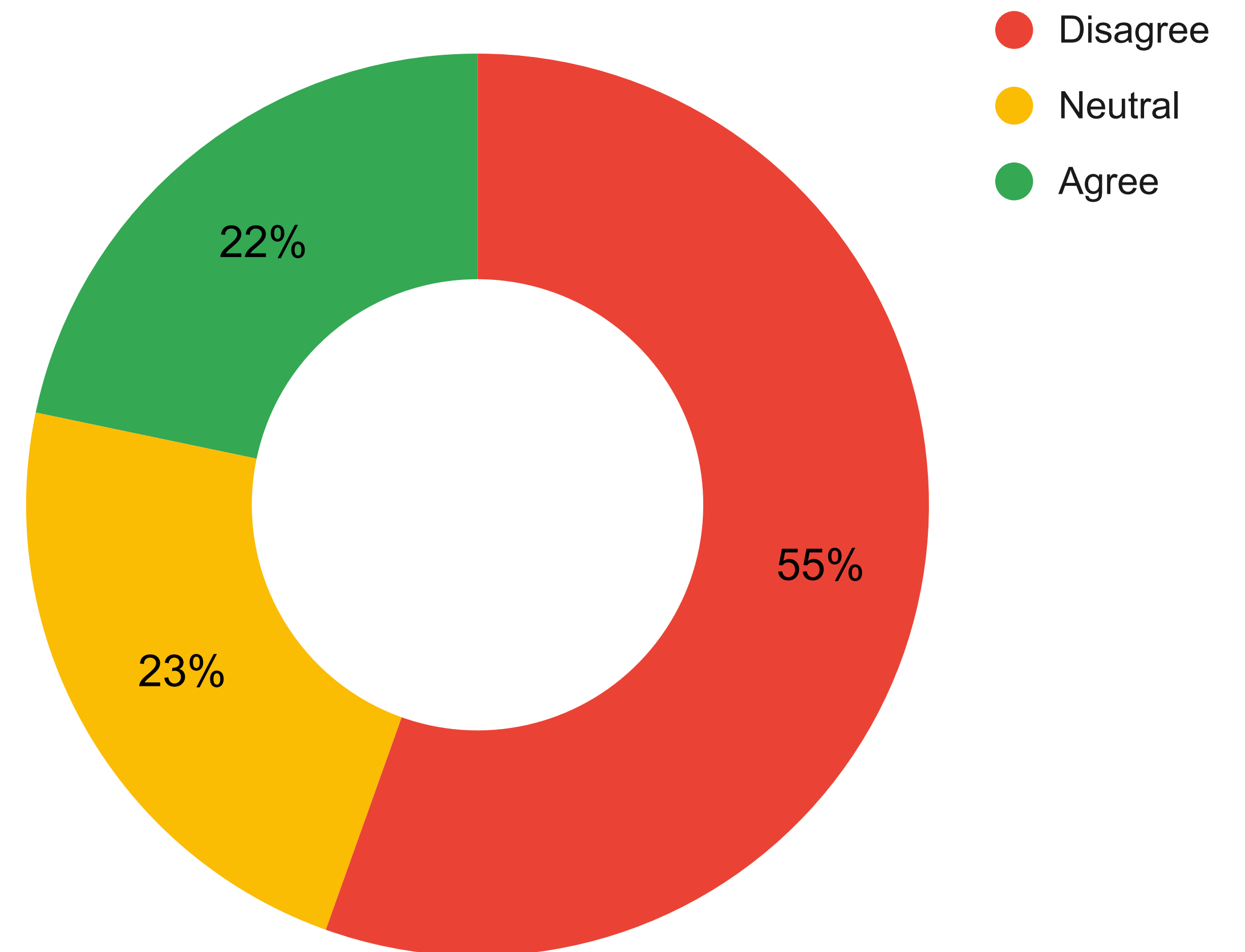




# Virtual Reality Travel/Tourism

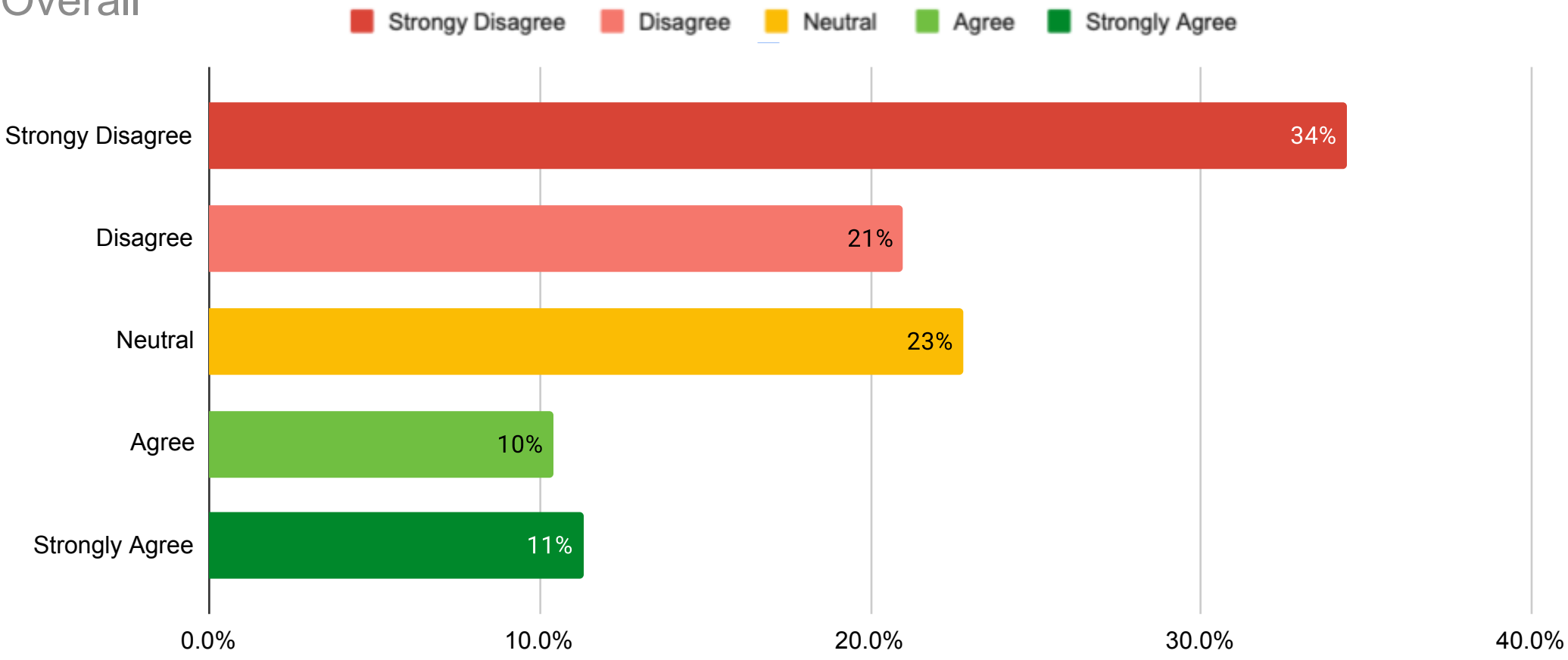
22% of respondents feel comfortable interacting with **Virtual Reality Travel/Tourism**

*(% of respondents who strongly agreed or agreed with the statement: "I feel comfortable interacting with this technology")*

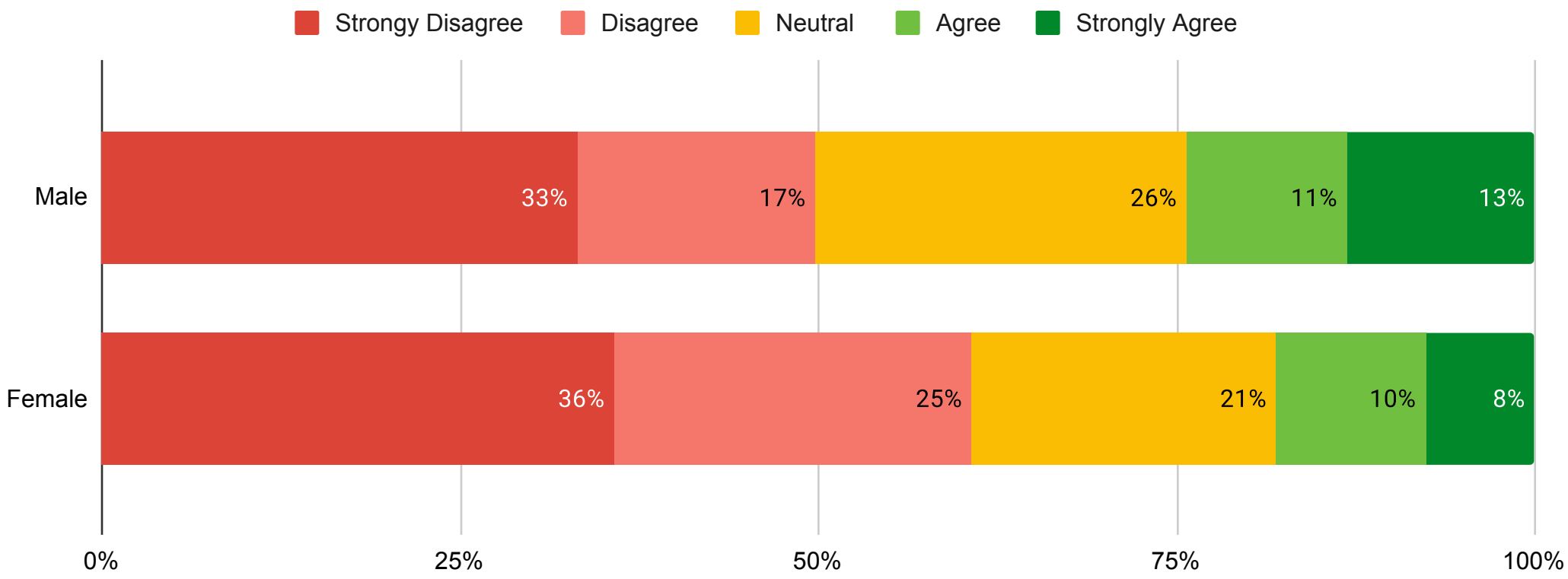




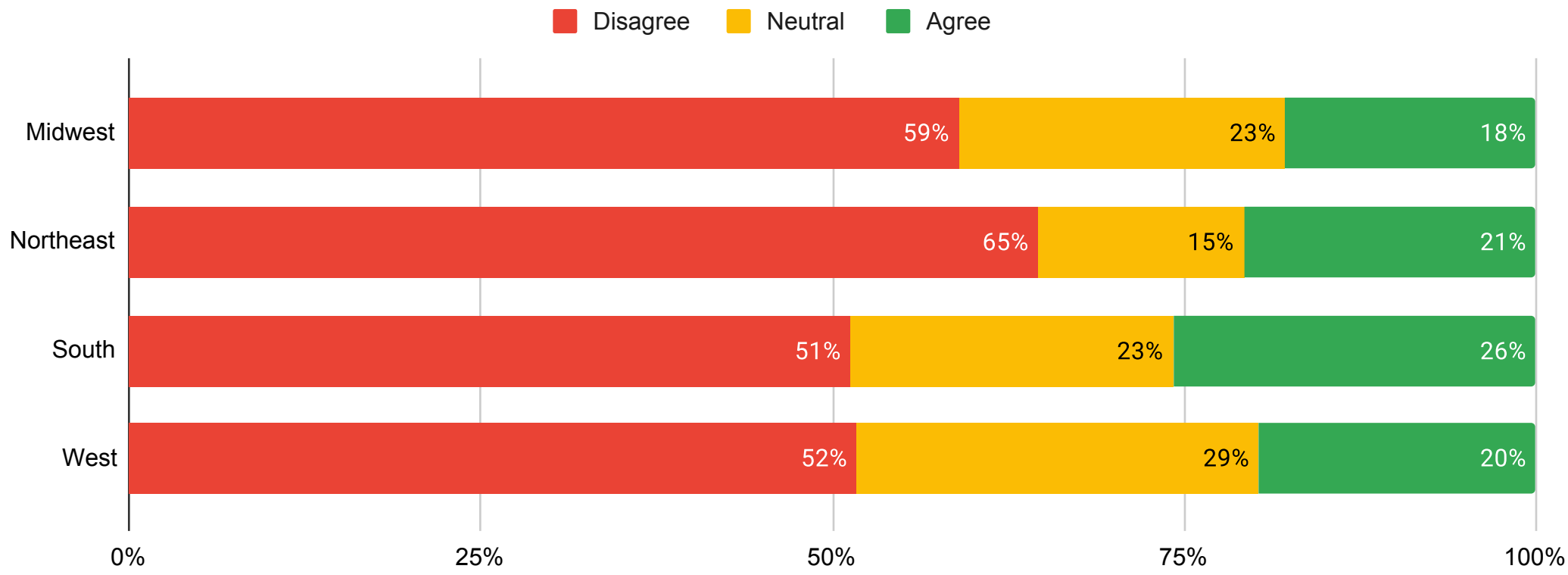
Overall



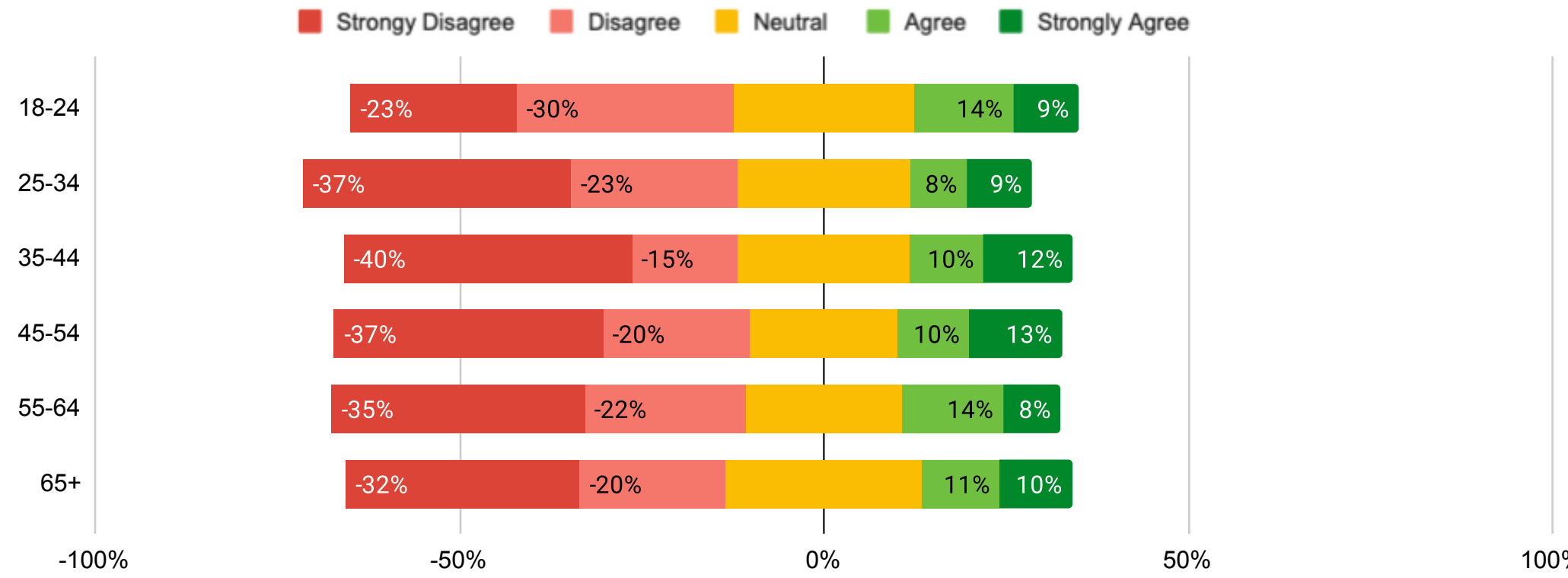
Gender Breakdown



Region Breakdown



Age Breakdown







# Virtual Reality Wellness Session

Virtual Reality Technologies

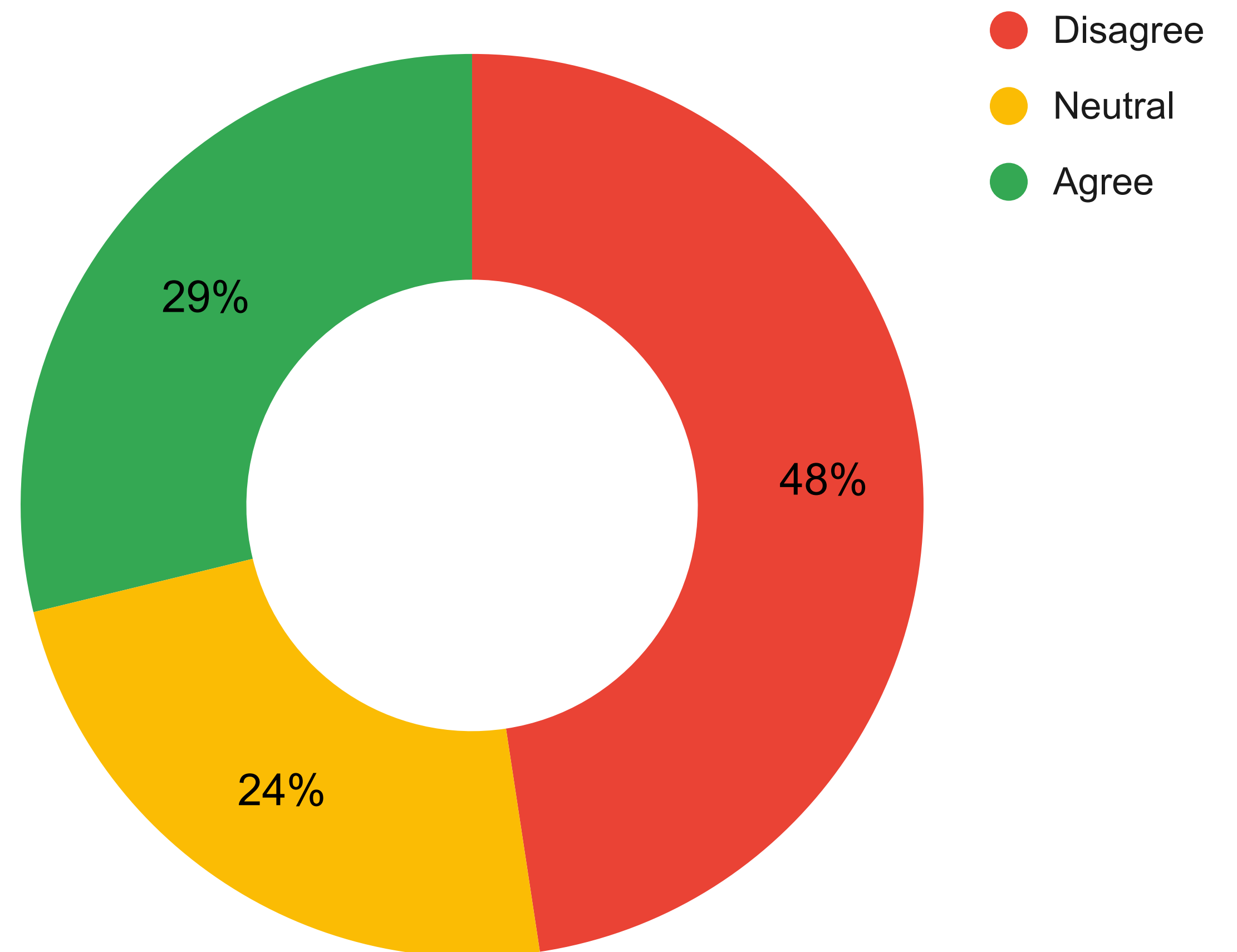




# Virtual Reality Wellness Session

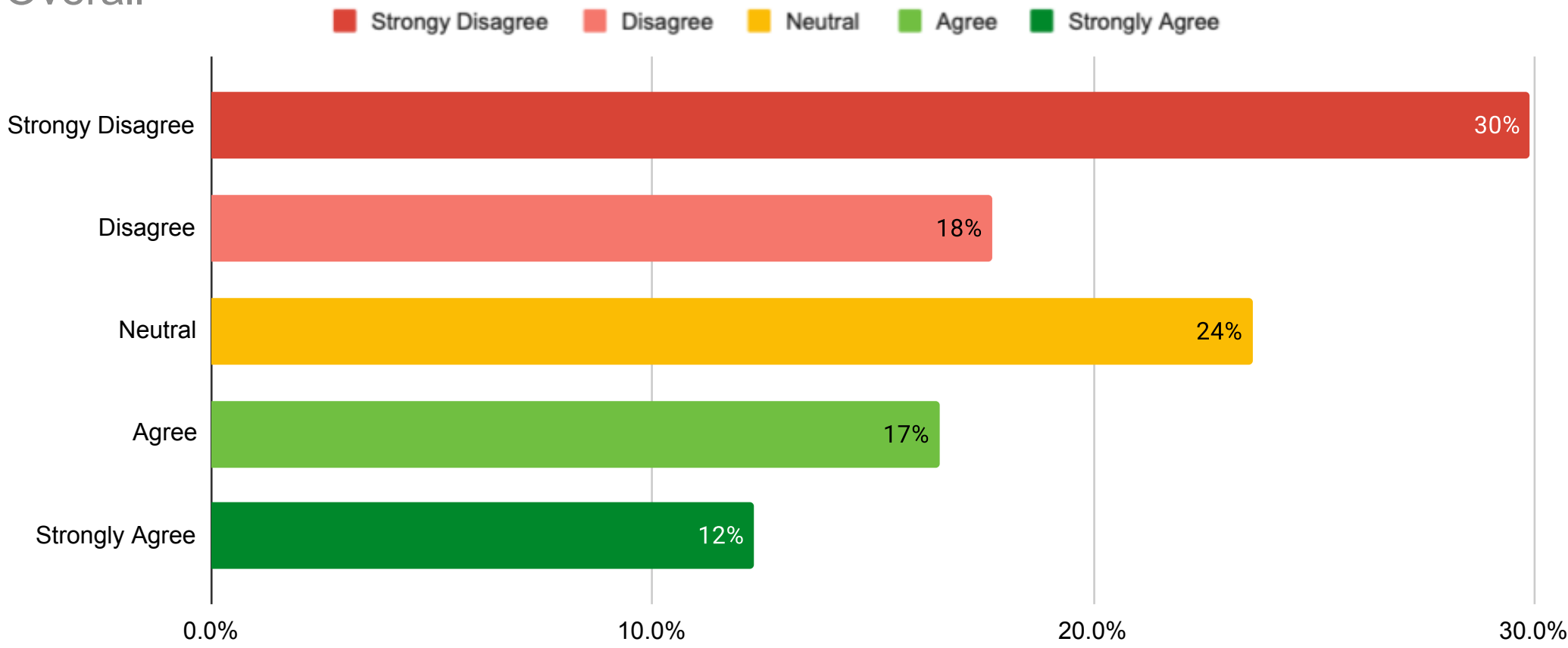
29% of respondents feel comfortable interacting with **Virtual Reality Wellness Session**

*(% of respondents who strongly agreed or agreed with the statement: "I feel comfortable interacting with this technology")*

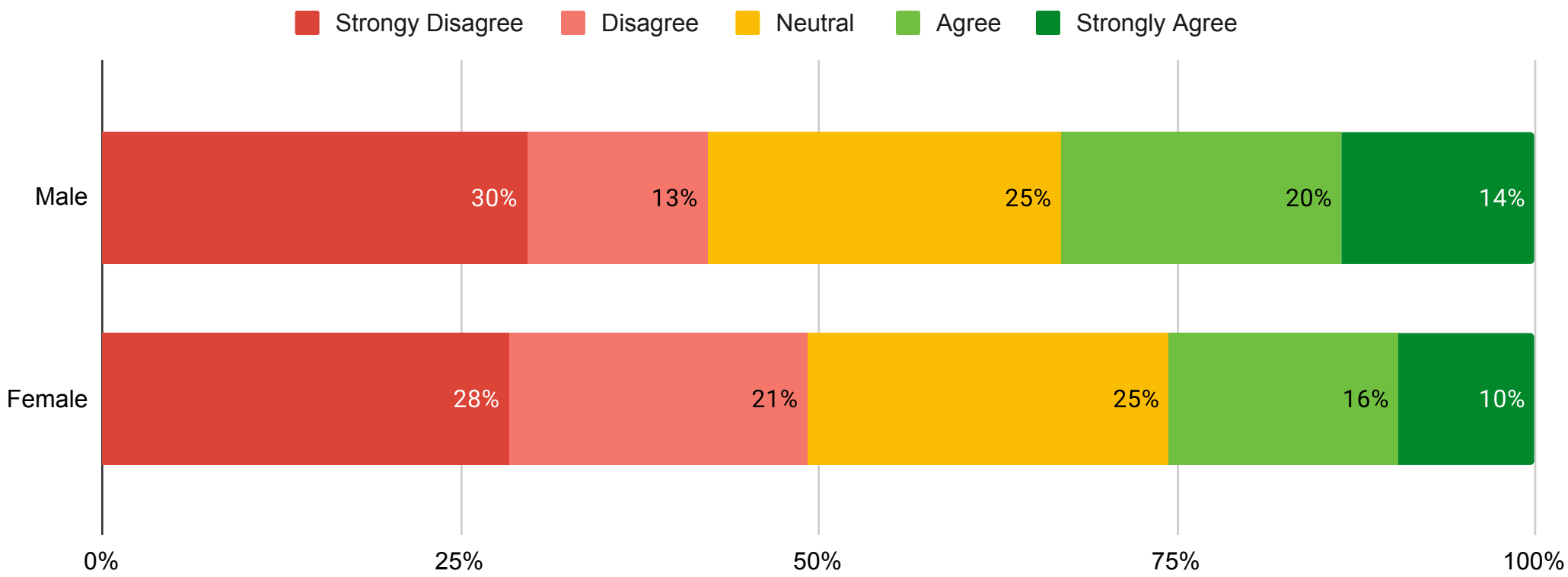




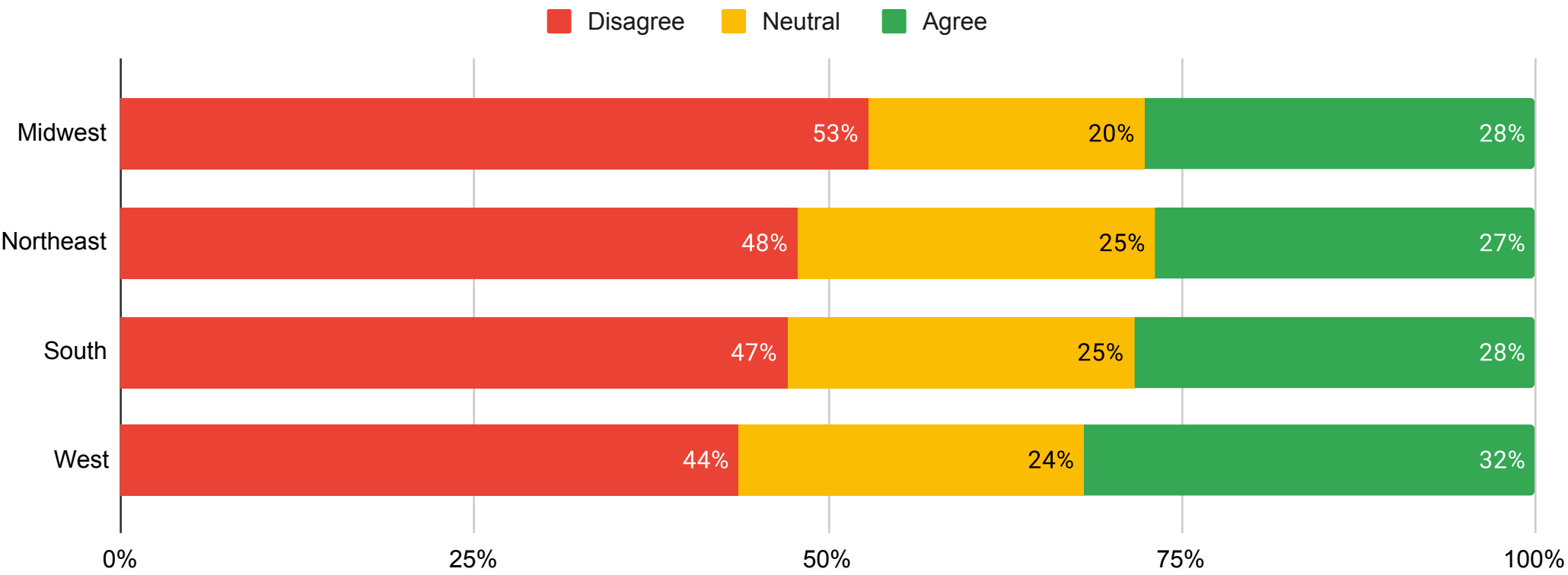
Overall



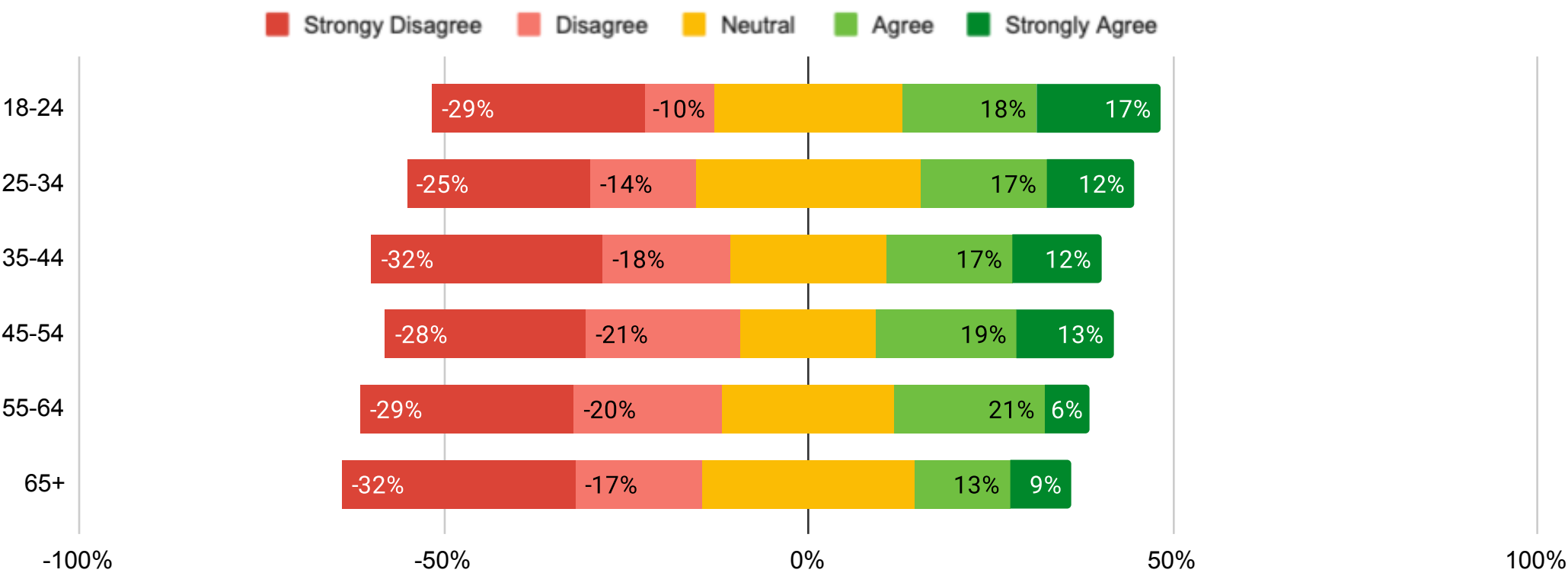
Gender Breakdown



Region Breakdown



Age Breakdown





# Virtual Reality Headset

Virtual Reality Technologies

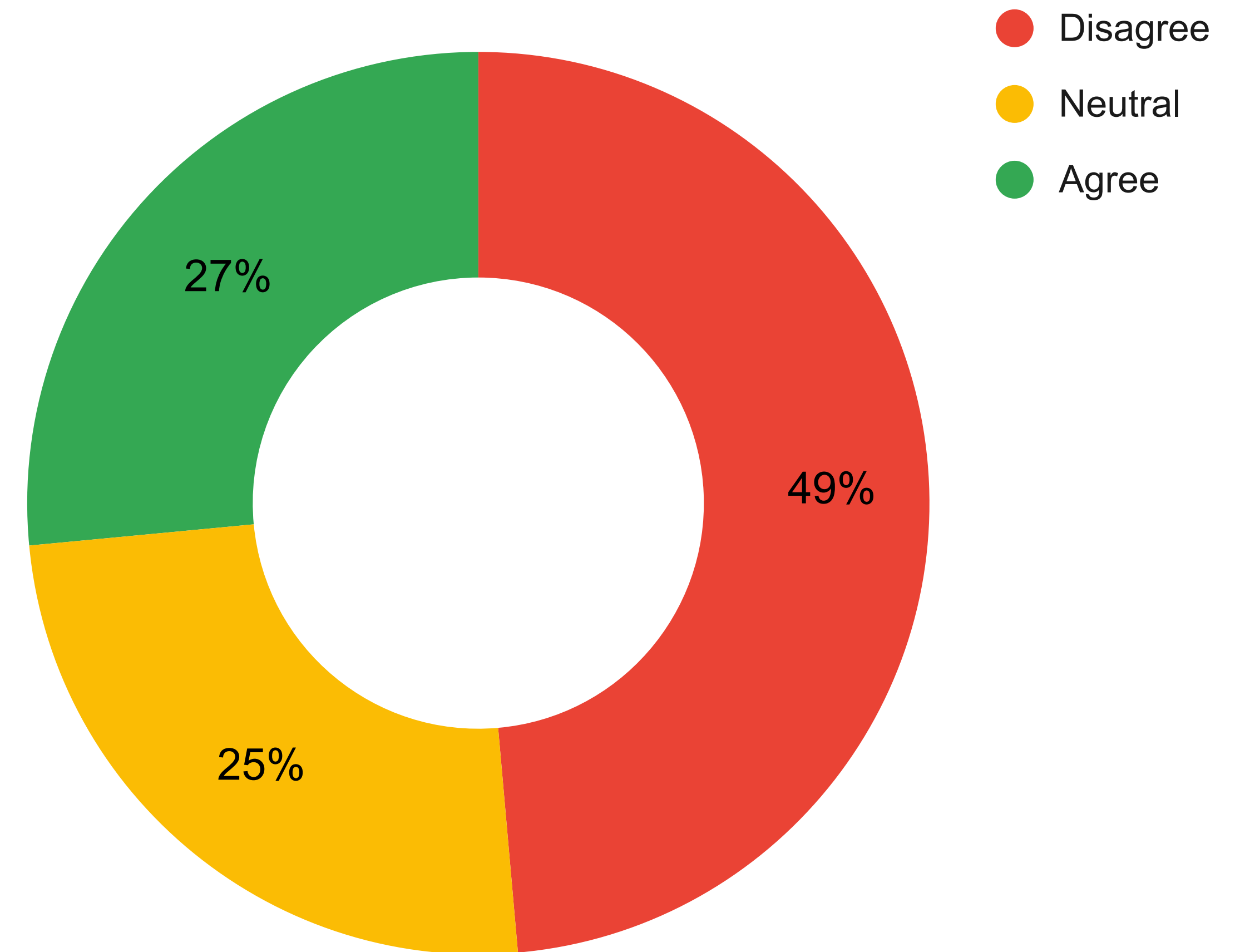
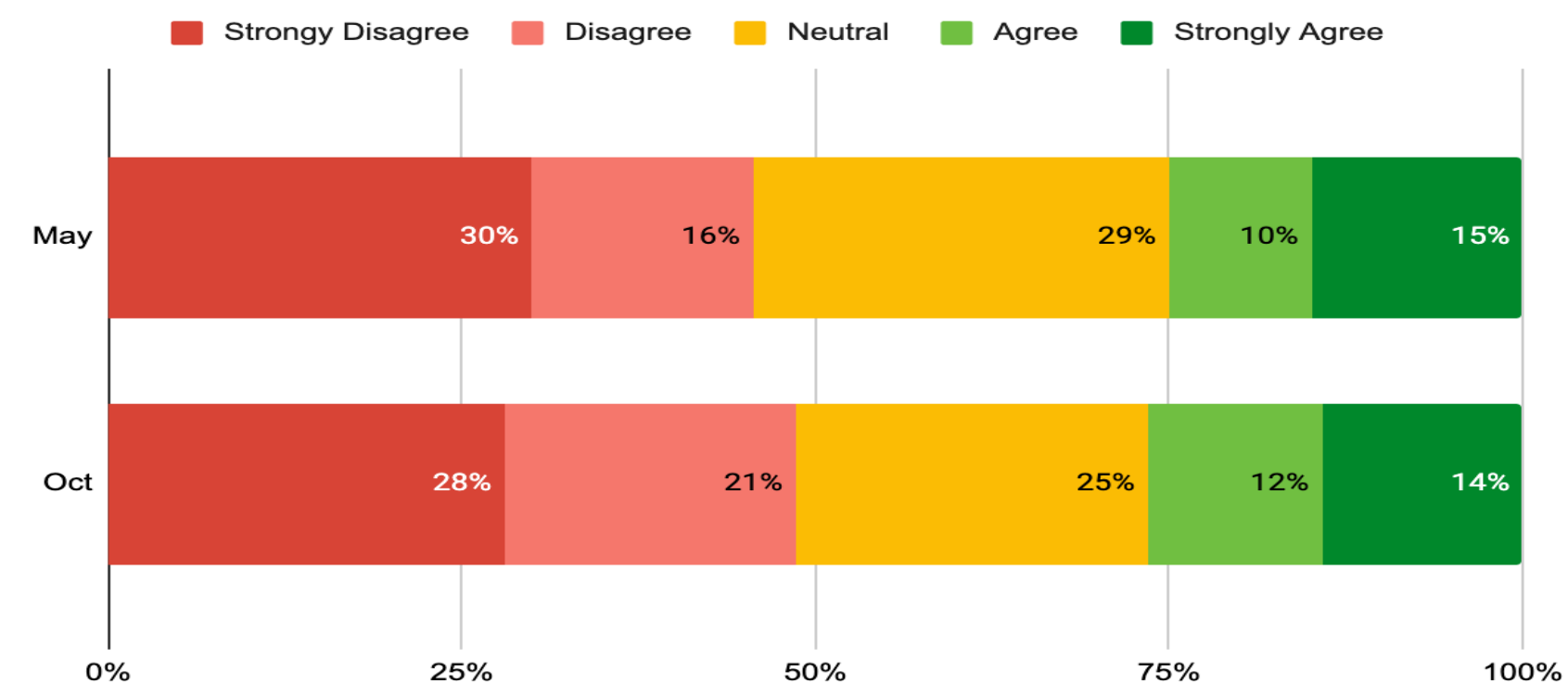




# Virtual Reality Headset

27% of respondents feel comfortable interacting with **Virtual Reality Headset**

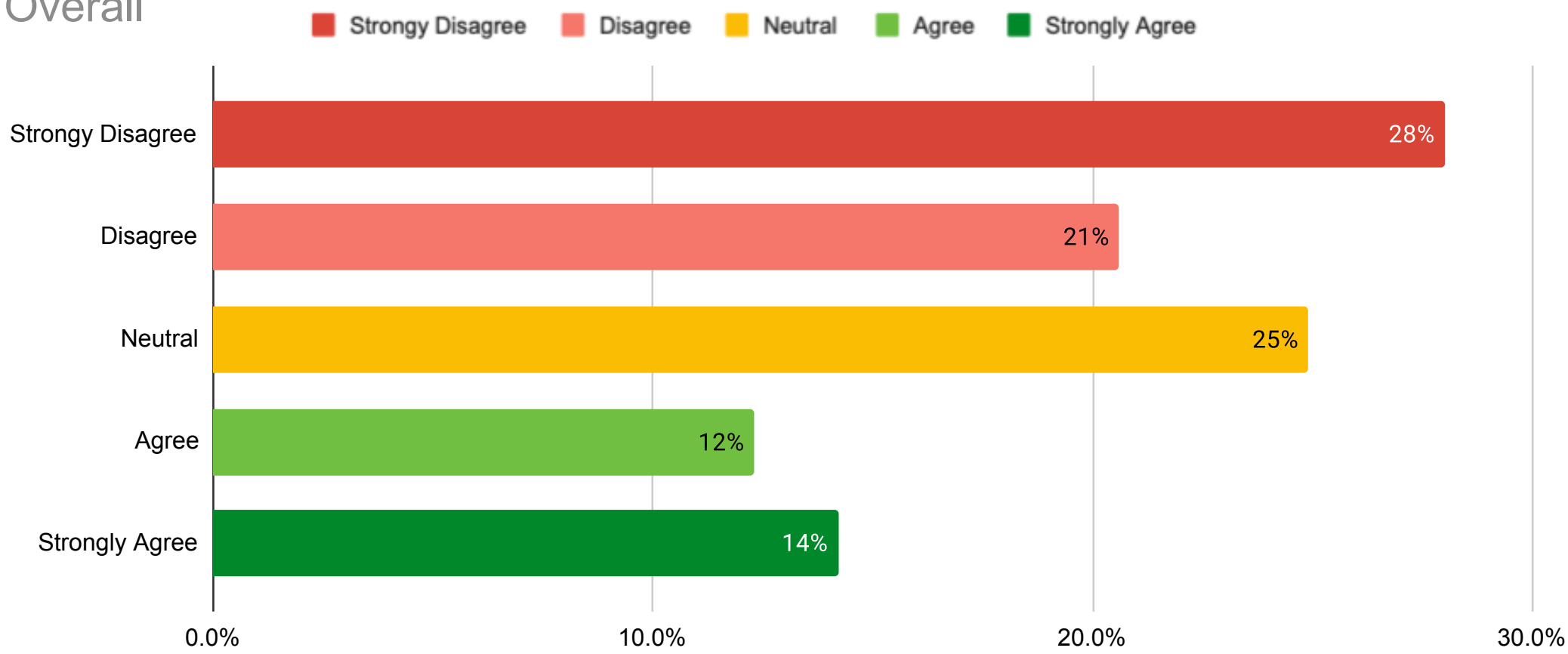
(% of respondents who strongly agreed or agreed with the statement: “I feel comfortable interacting with this technology”)



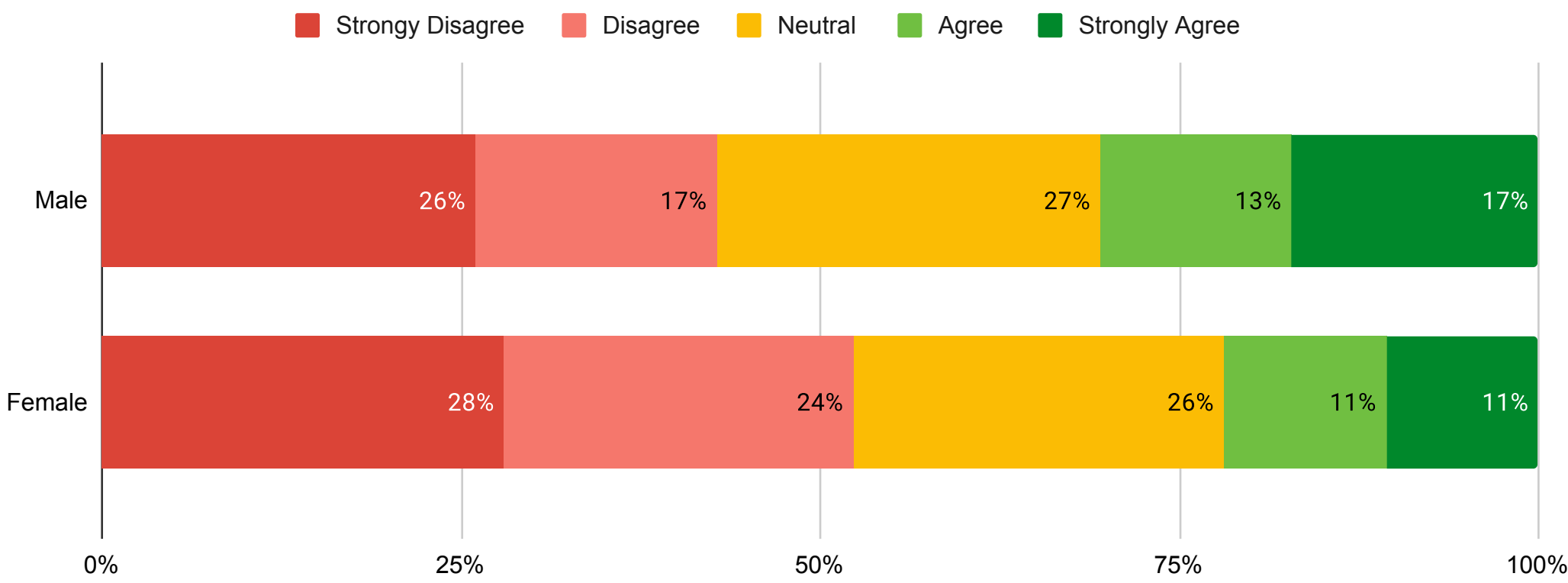




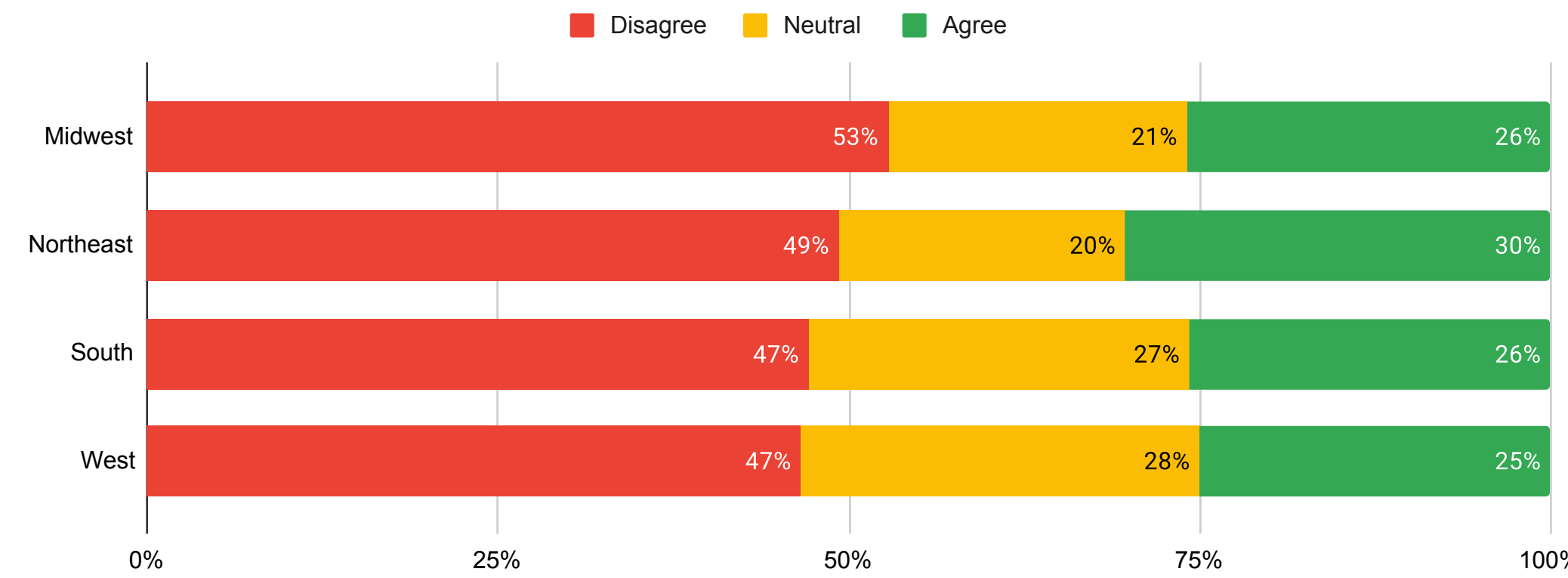
Overall



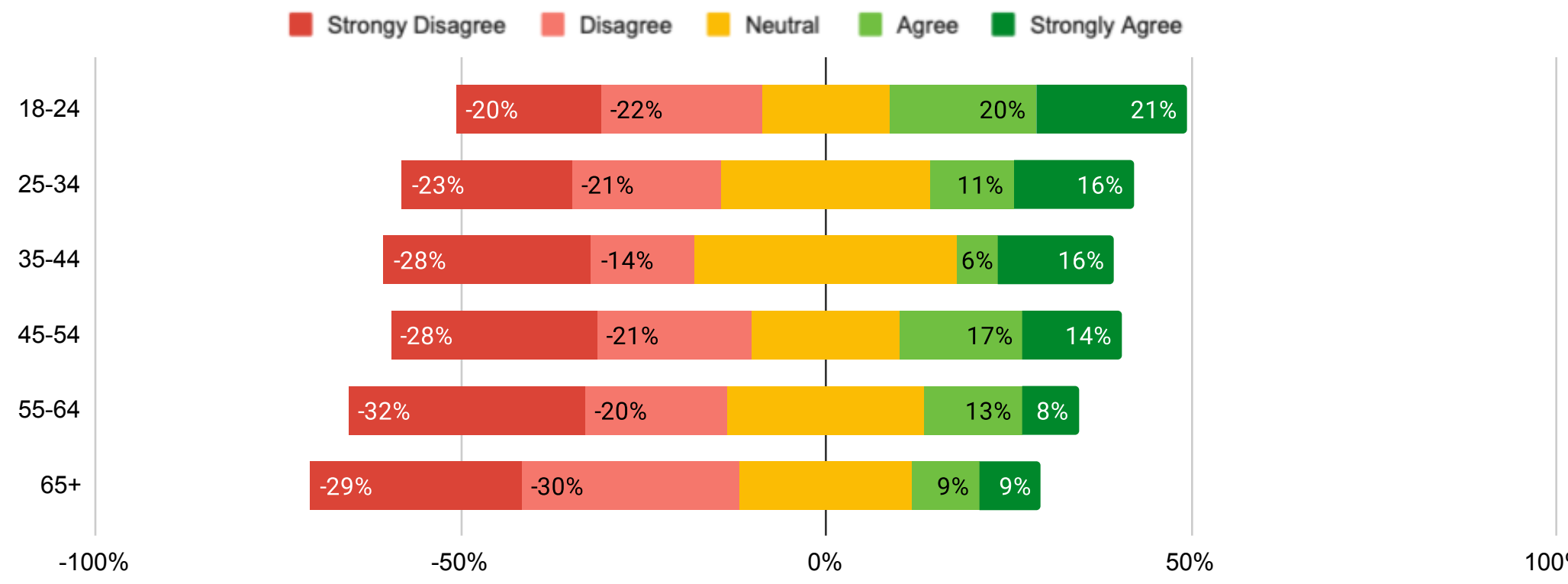
Gender Breakdown



Region Breakdown

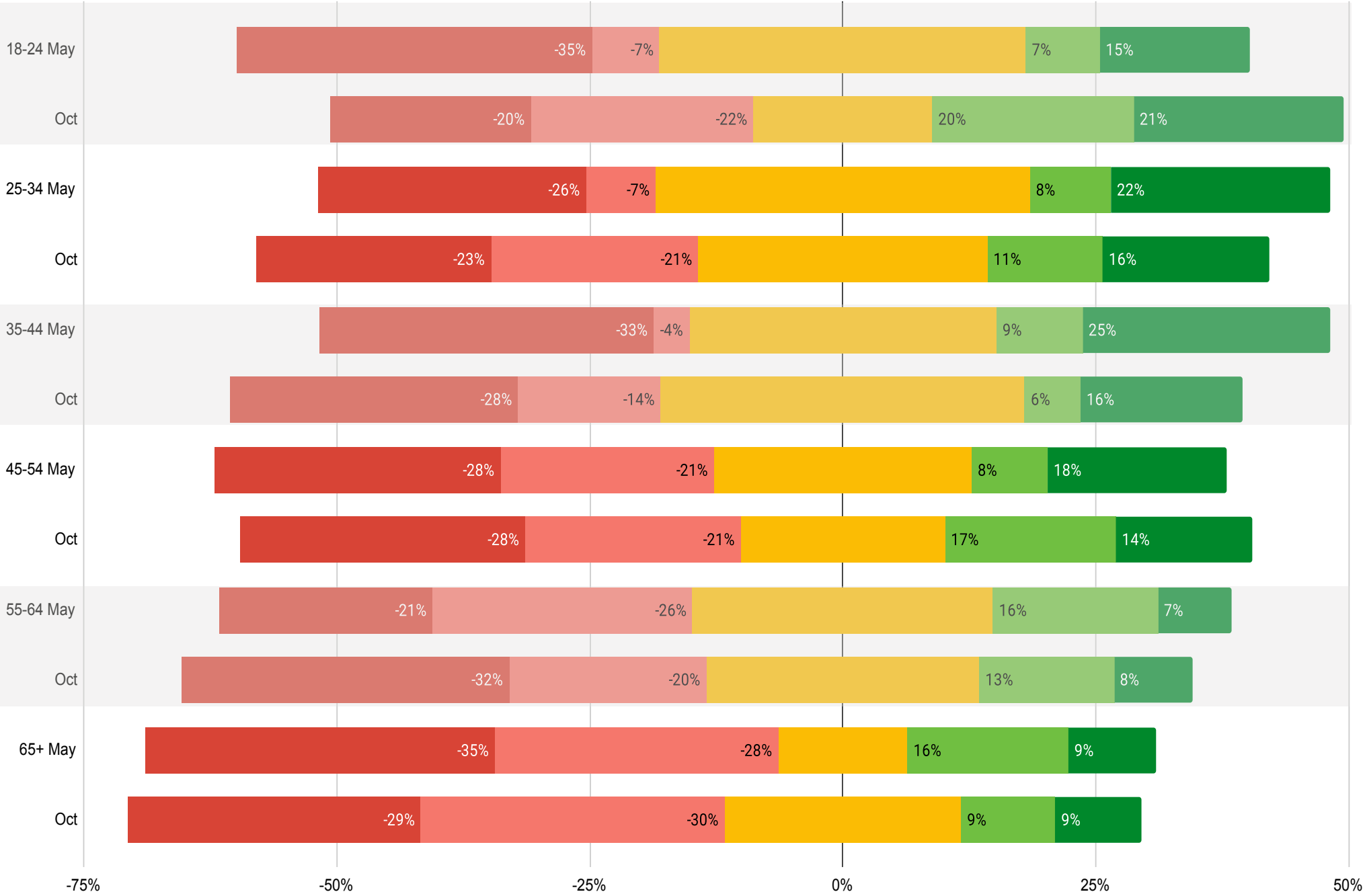


Age Breakdown



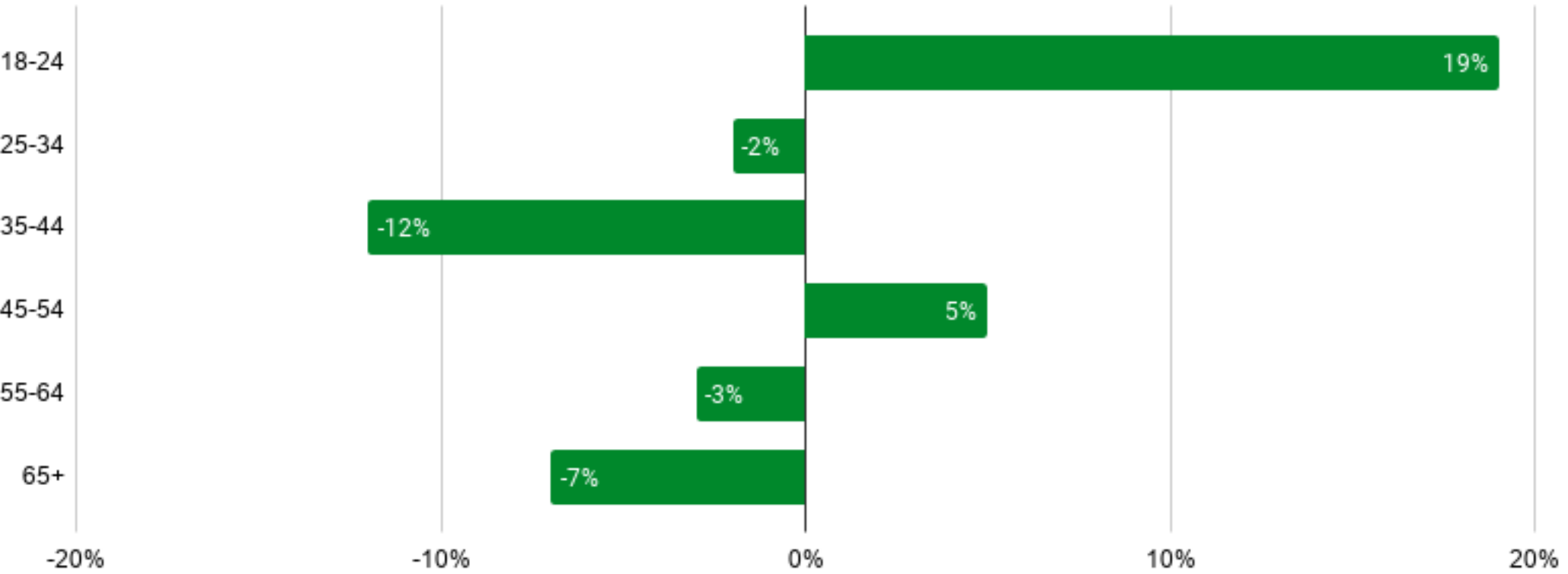


# Comparison between May & October Results (Age Breakdown)

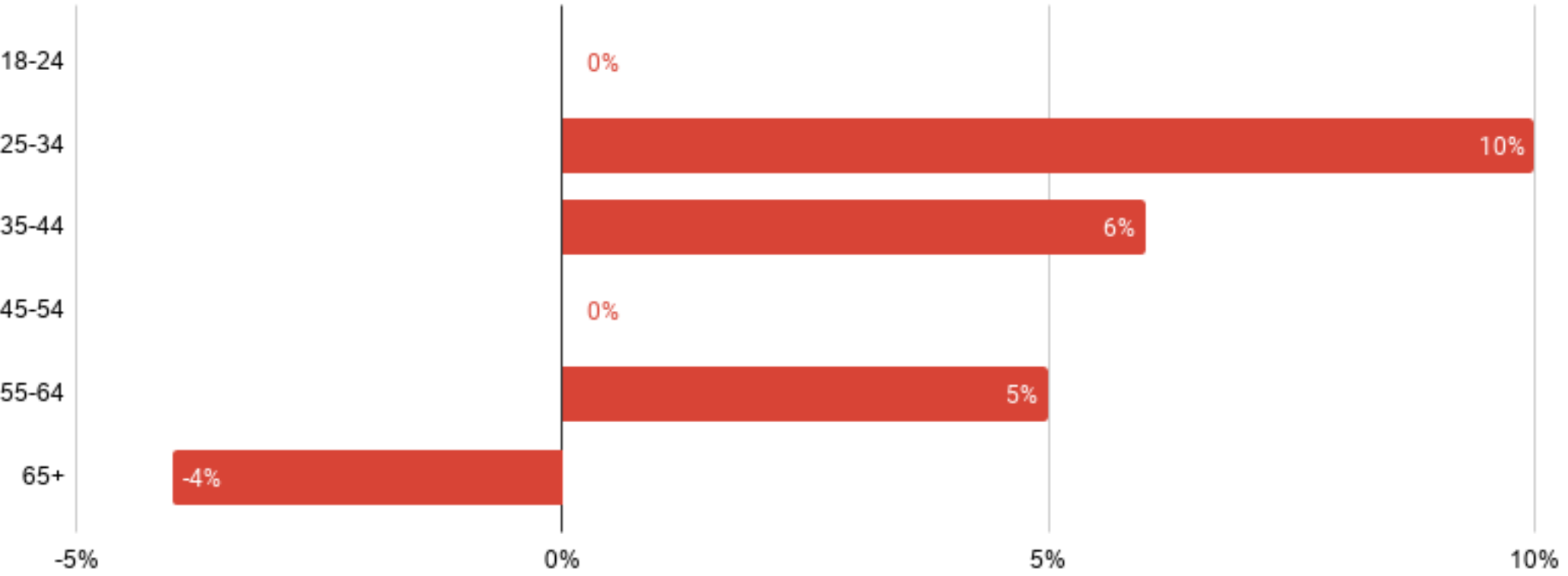


% Change from May 2020 to October 2020 by Age Group

Agree Rate (Strongly Agree/Agree)



Disagree Rate (Strongly Disagree/Disagree)





# Virtual Reality Education

Virtual Reality Technologies

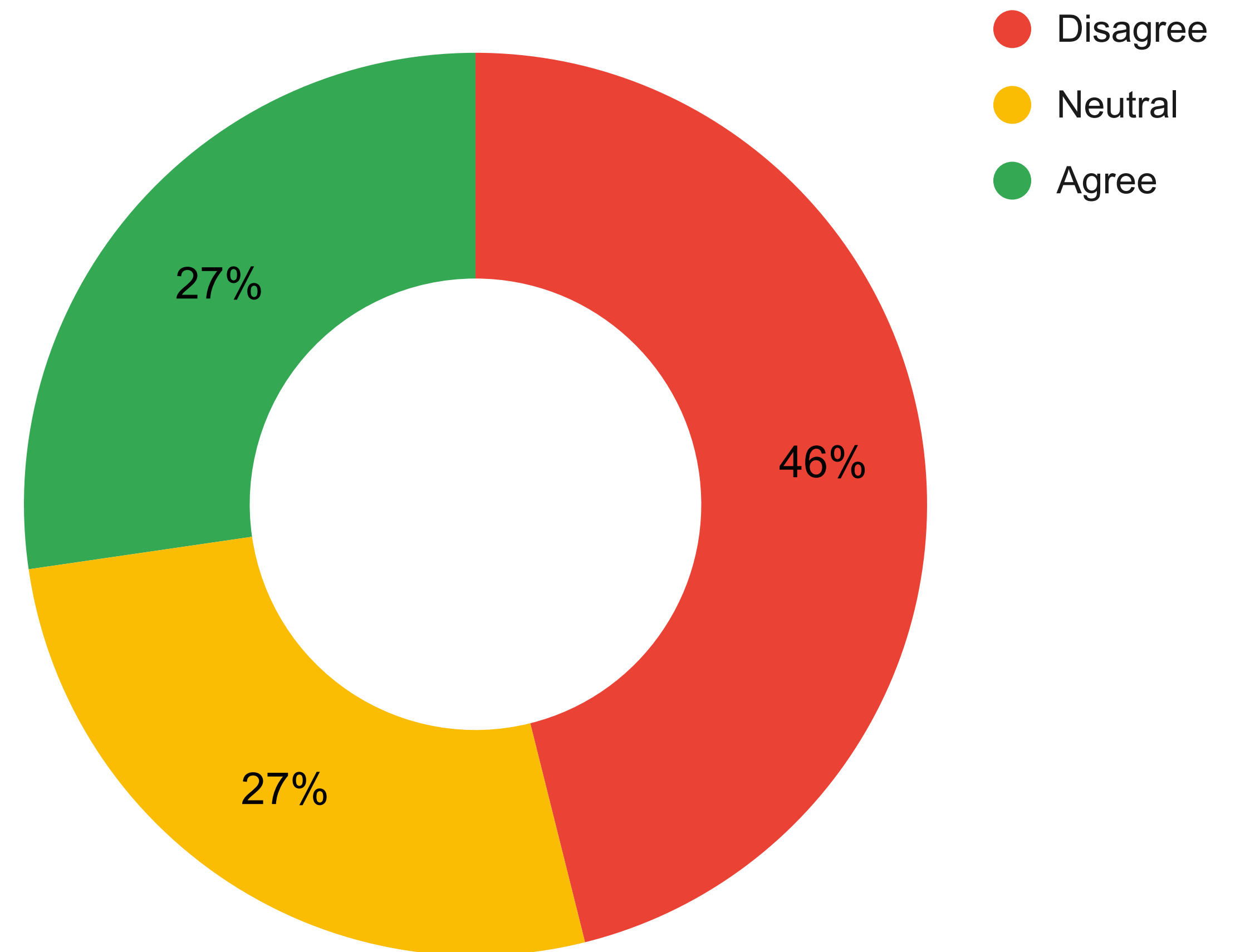




# Virtual Reality Education

27% of respondents feel comfortable interacting with **Virtual Reality Education**

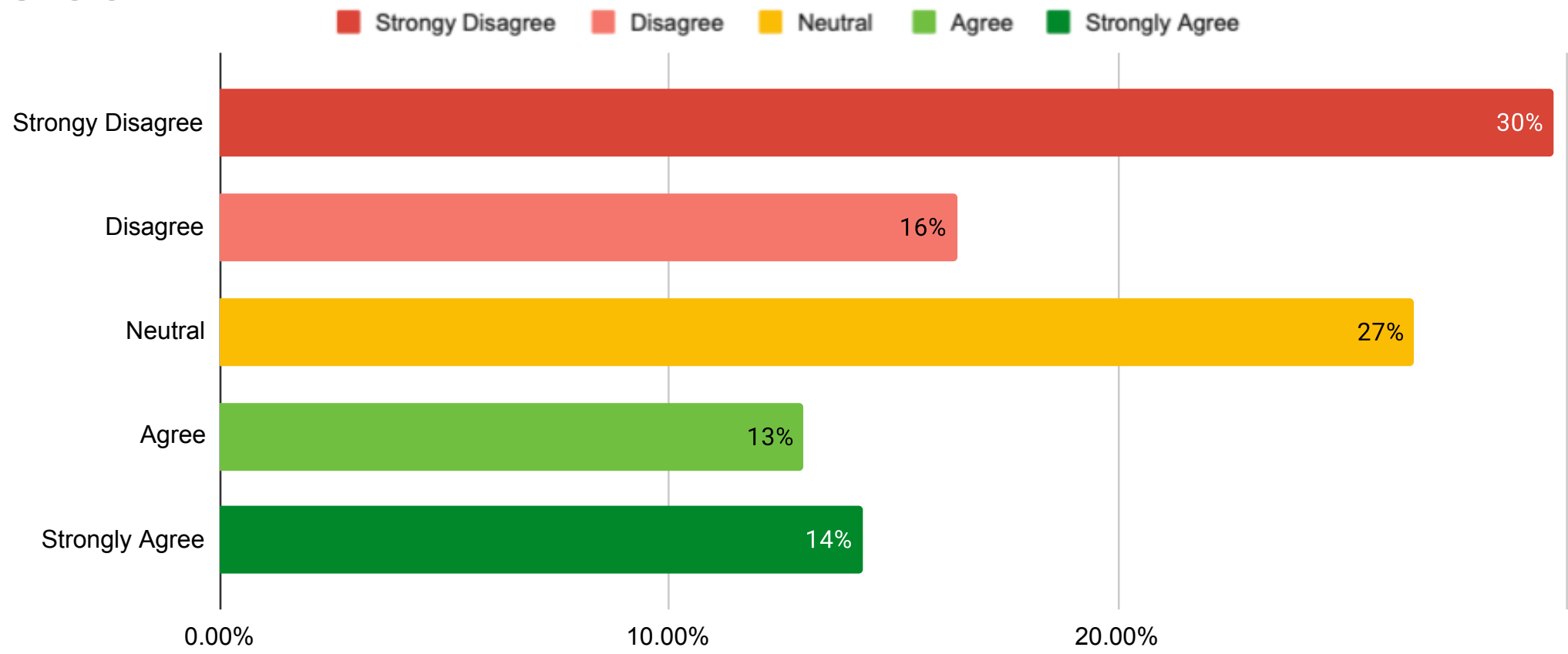
(% of respondents who strongly agreed or agreed with the statement: “I feel comfortable interacting with this technology”)



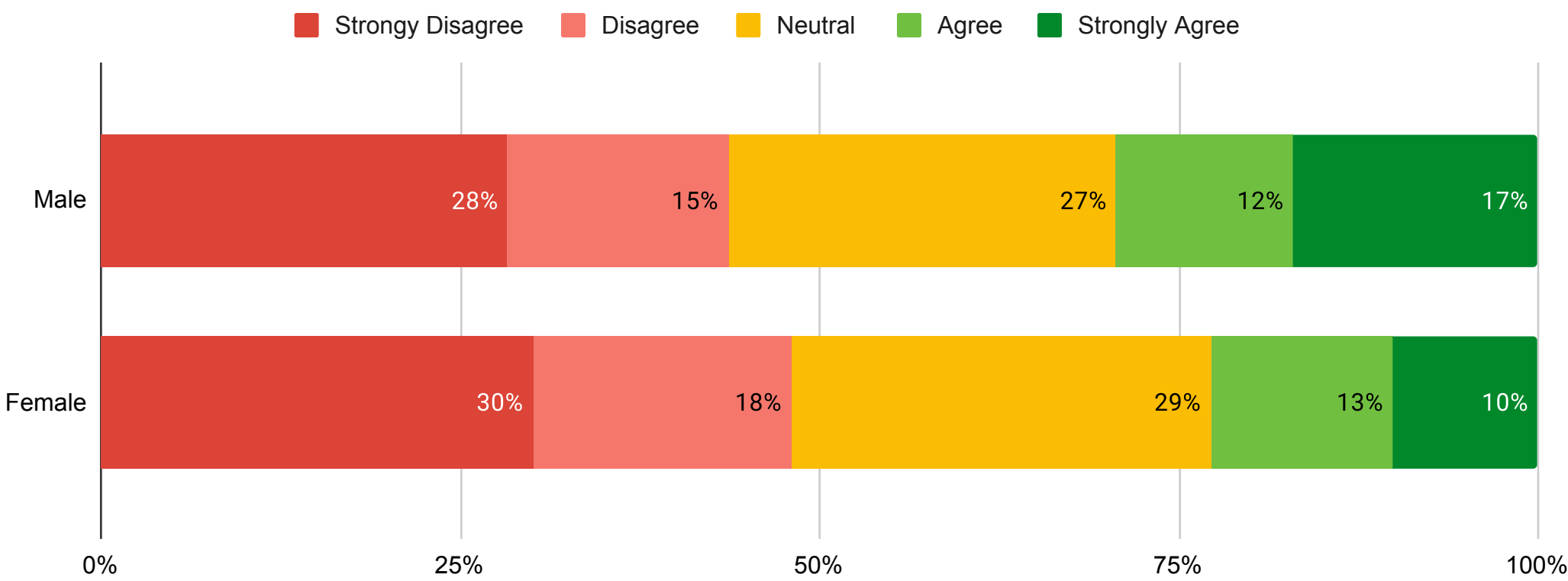




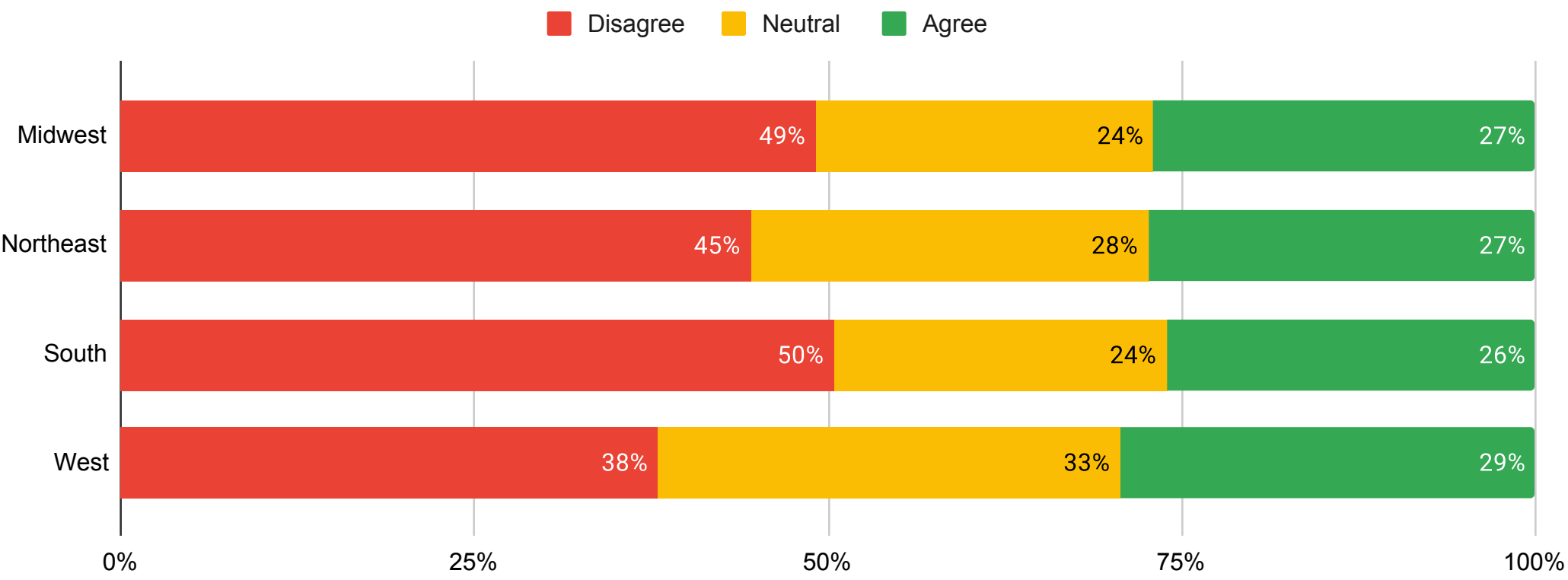
Overall



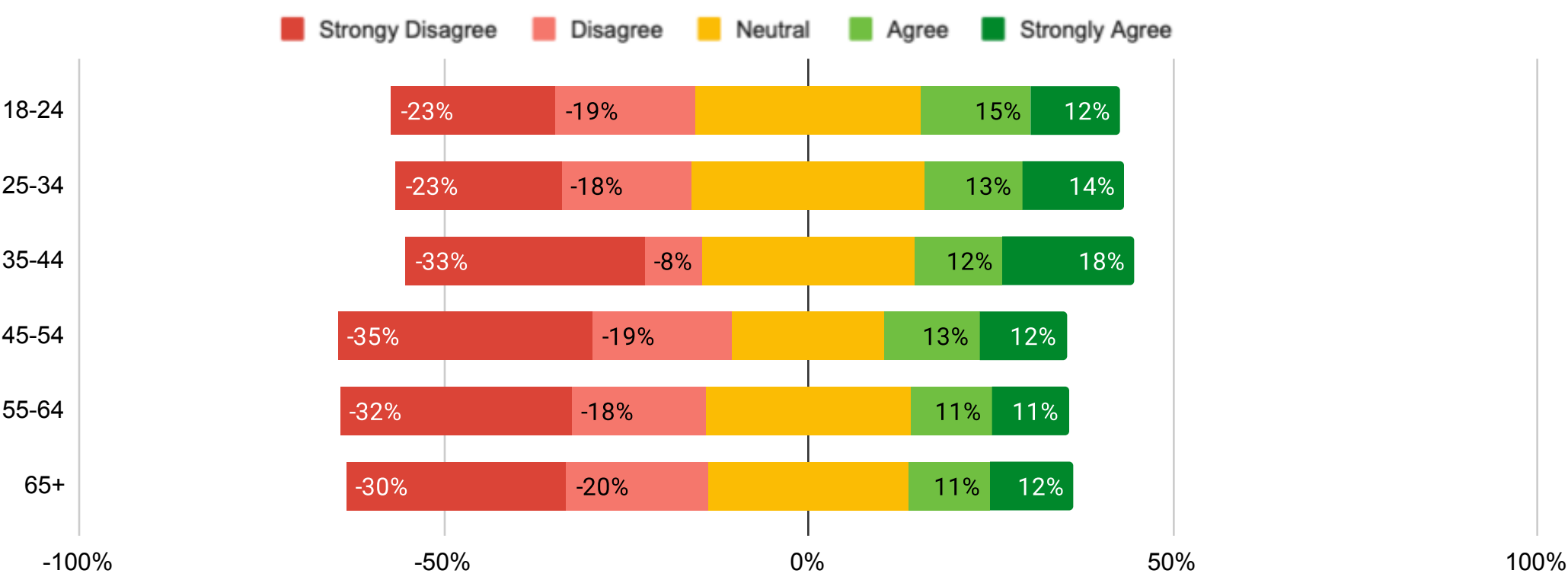
Gender Breakdown



Region Breakdown



Age Breakdown





# Virtual Reality Workspace

Virtual Reality Technologies

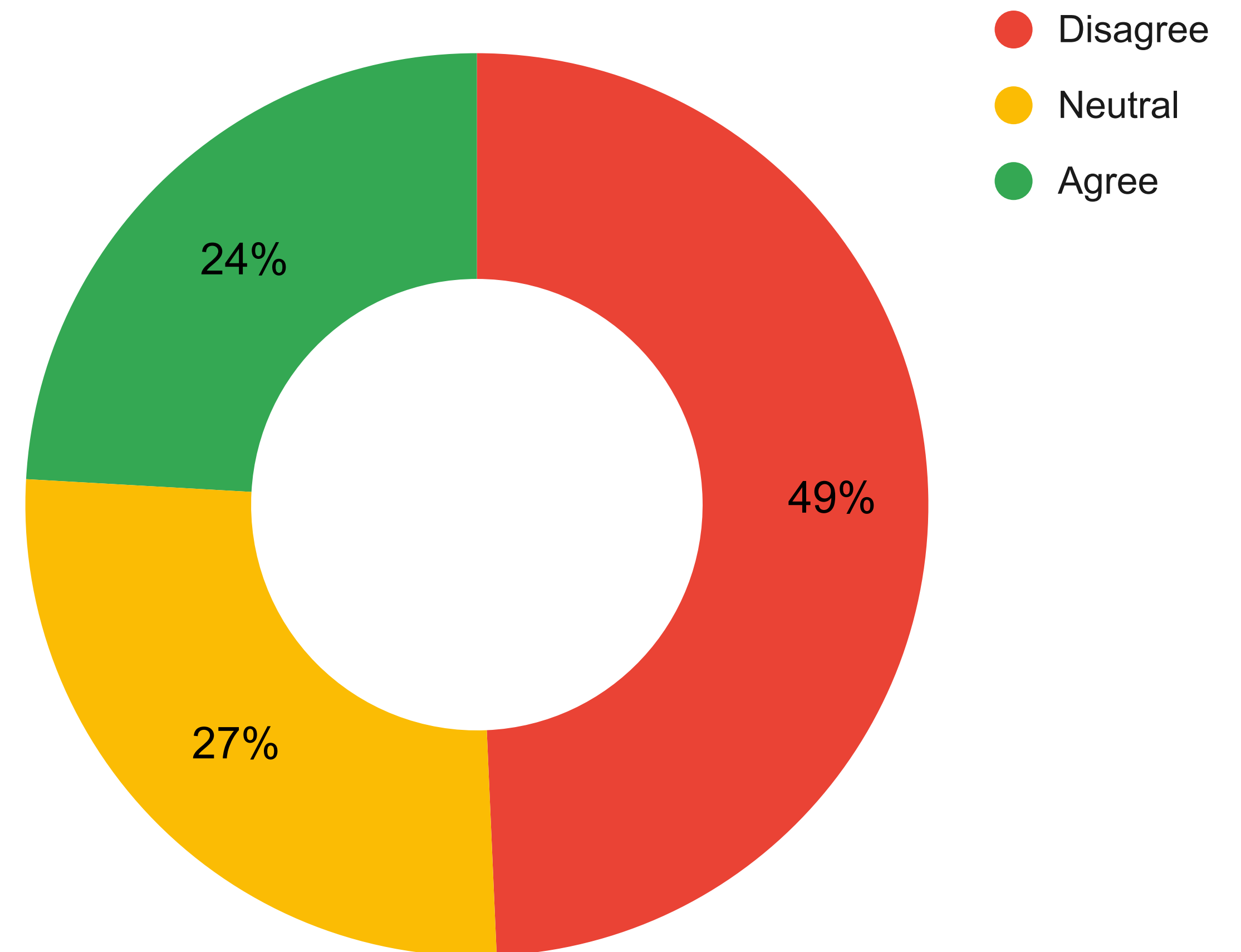




# Virtual Reality Workspace

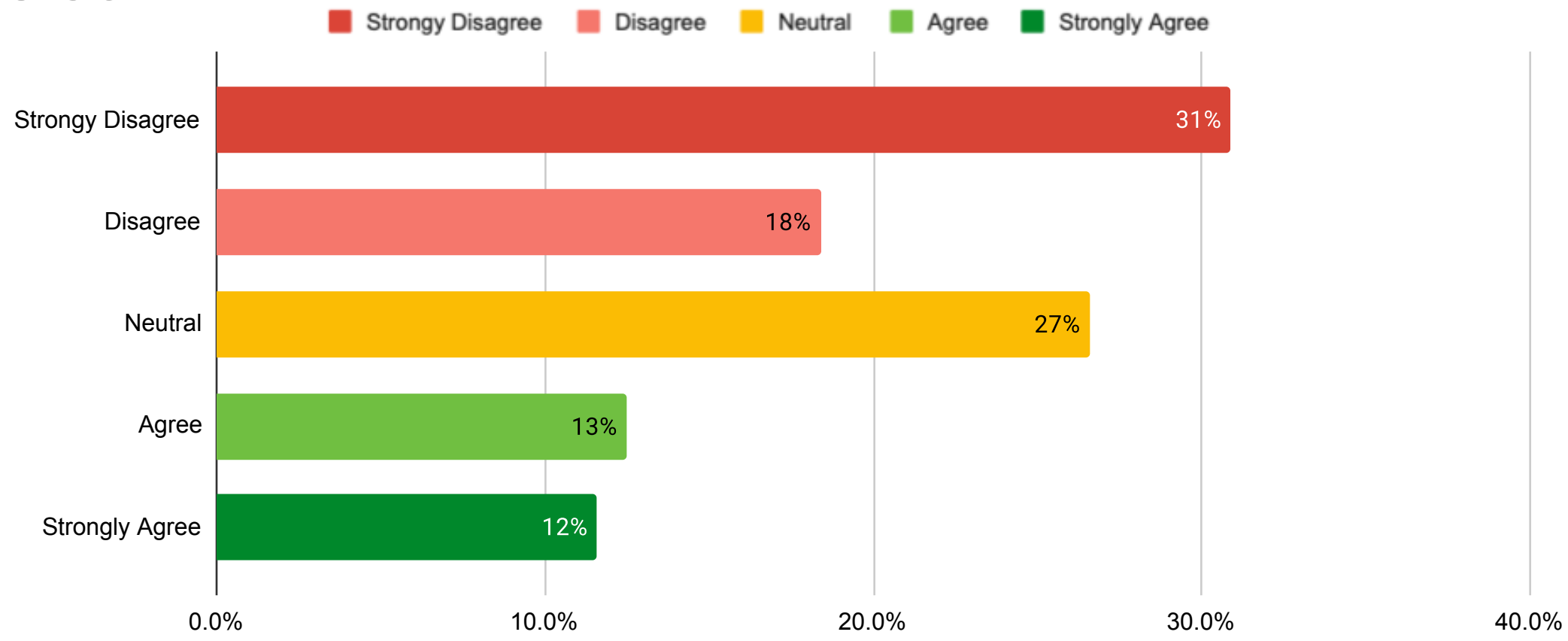
24% of respondents feel comfortable interacting with **Virtual Reality Workspace**

(% of respondents who strongly agreed or agreed with the statement: “I feel comfortable interacting with this technology”)

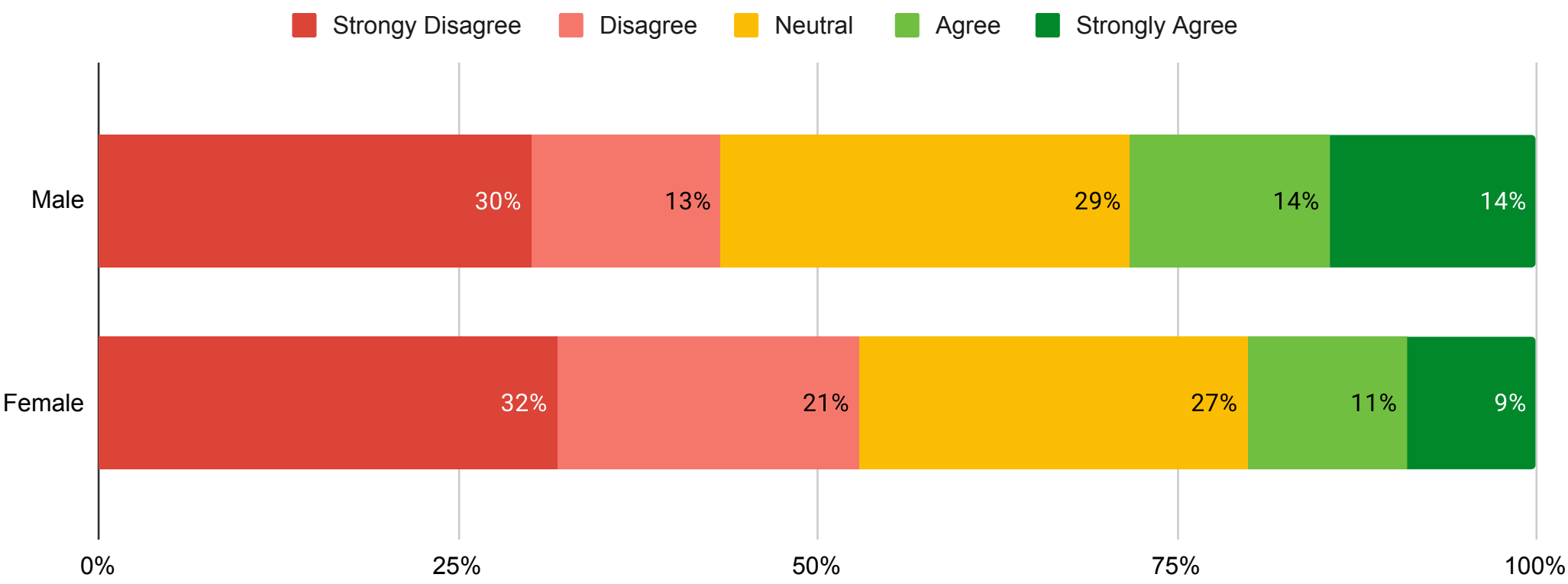




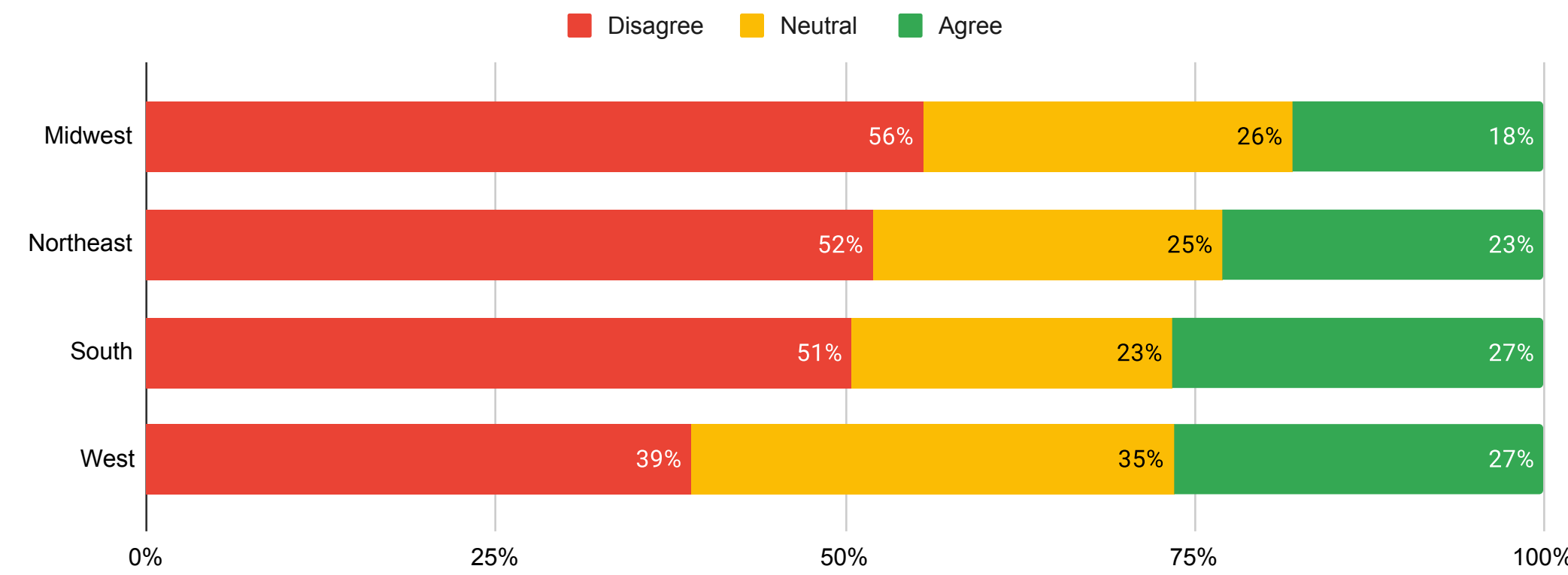
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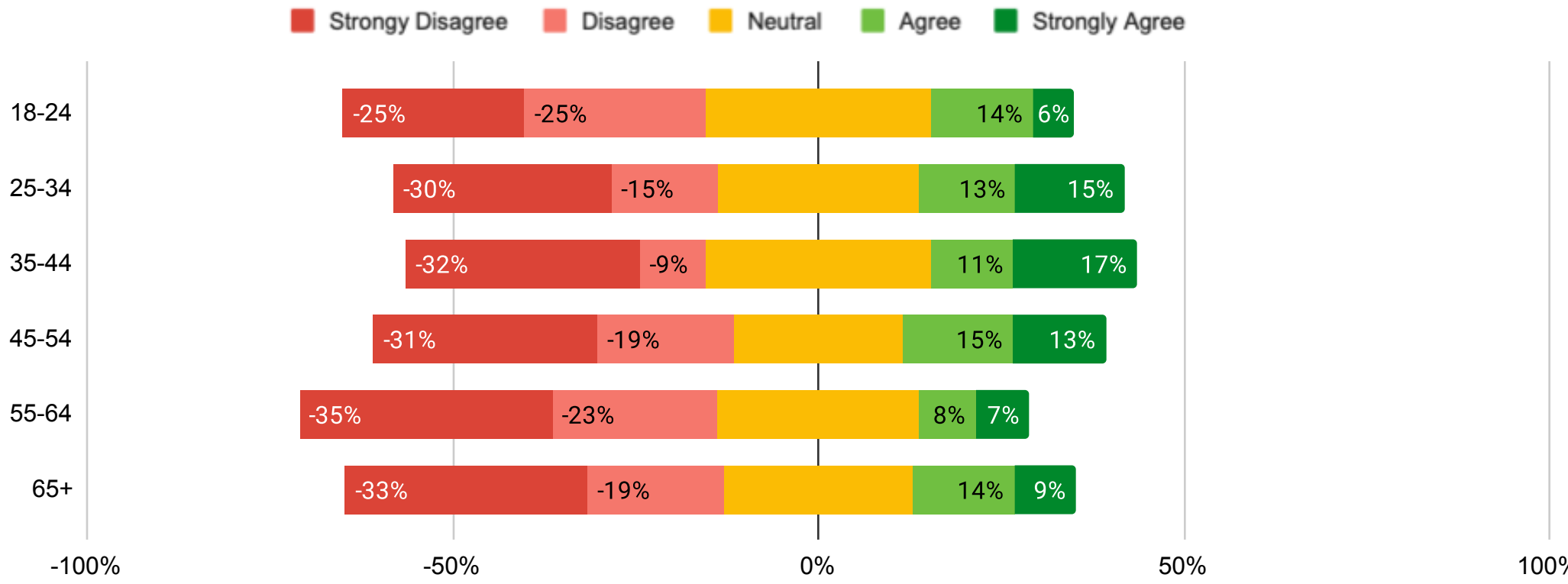
Gender Breakdown



Region Breakdown



Age Breakdown







# Virtual Reality Workplace Training

Virtual Reality Technologies

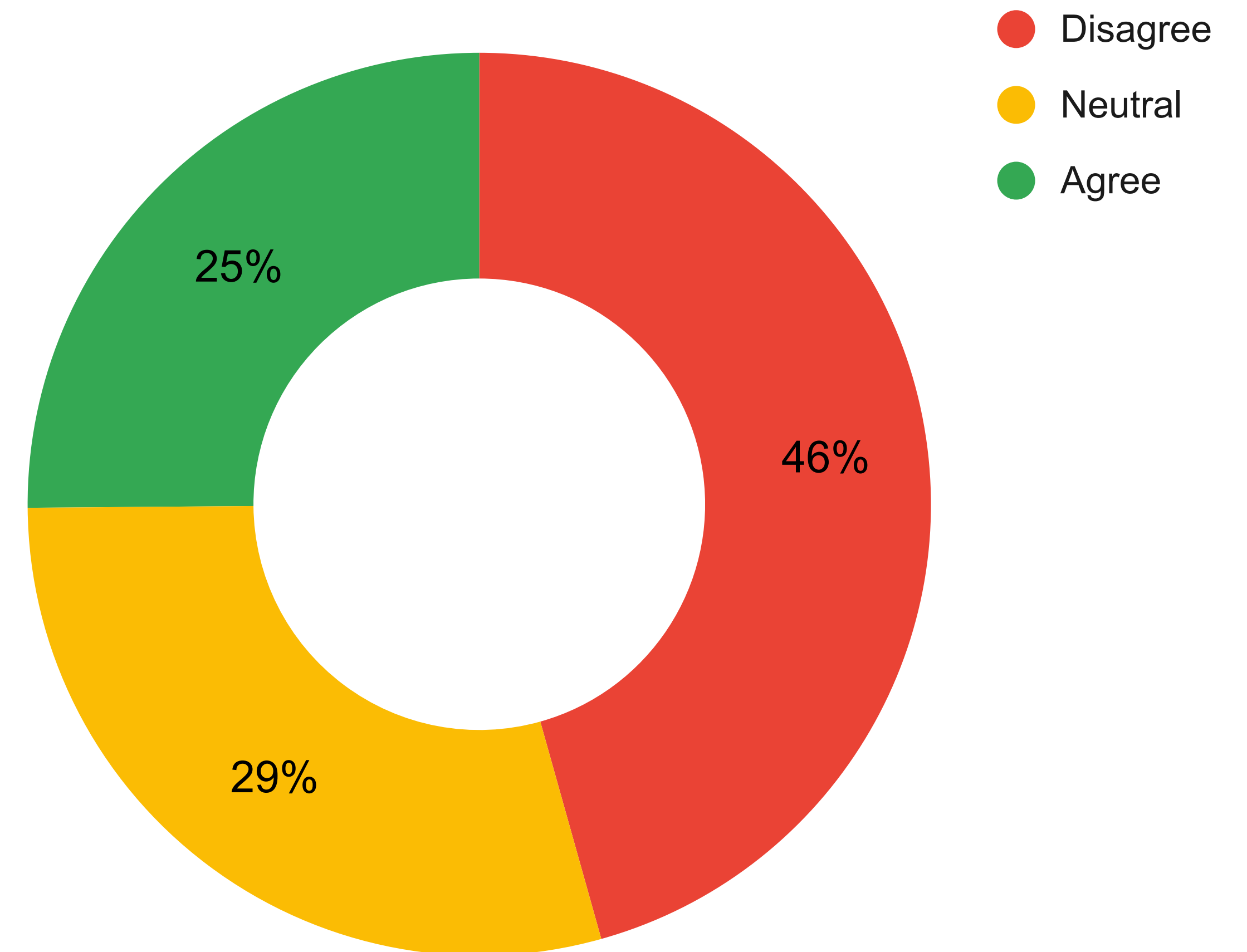




# Virtual Reality Workplace Training

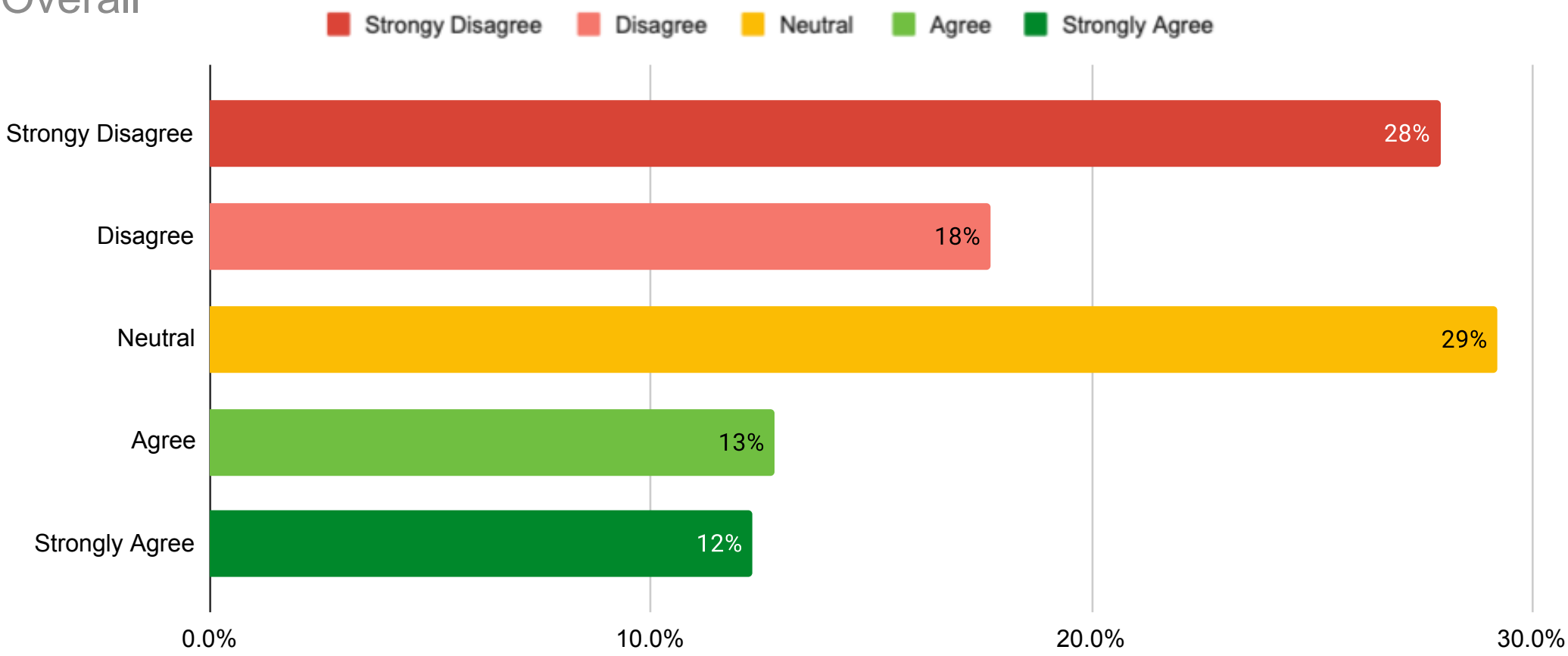
25% of respondents feel comfortable interacting with **Virtual Reality Workplace Training**

(% of respondents who strongly agreed or agreed with the statement: “I feel comfortable interacting with this technology”)

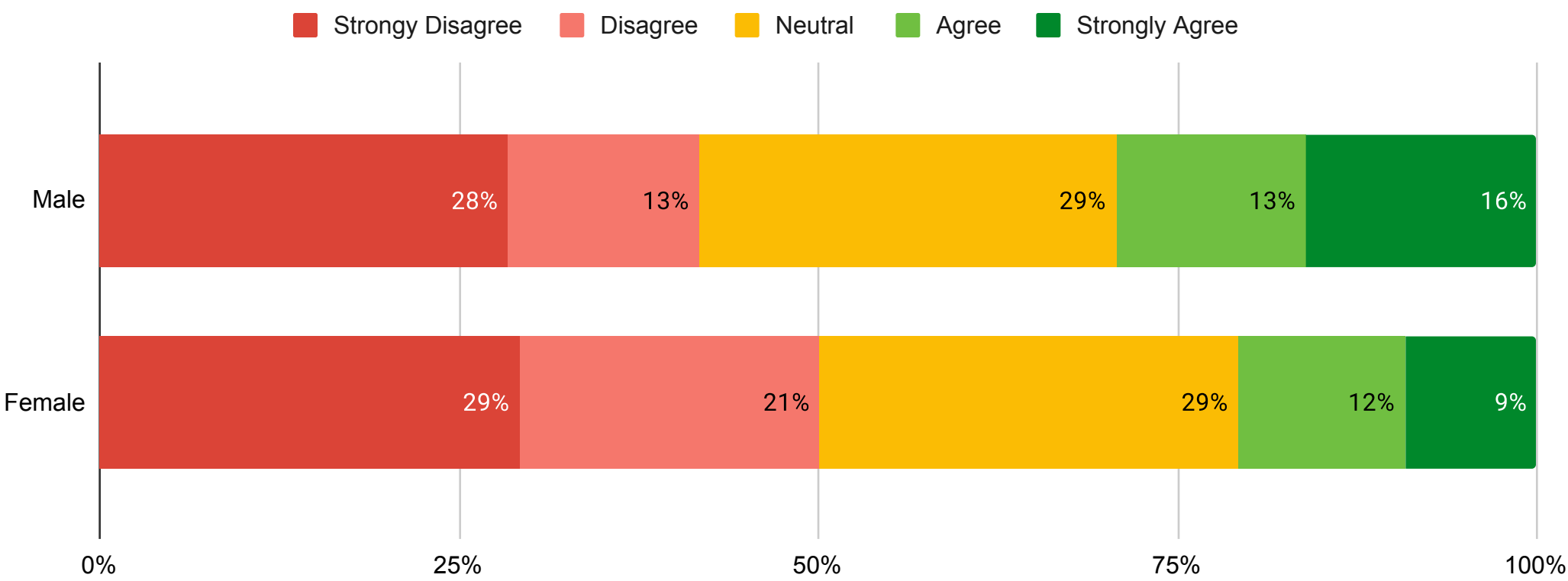




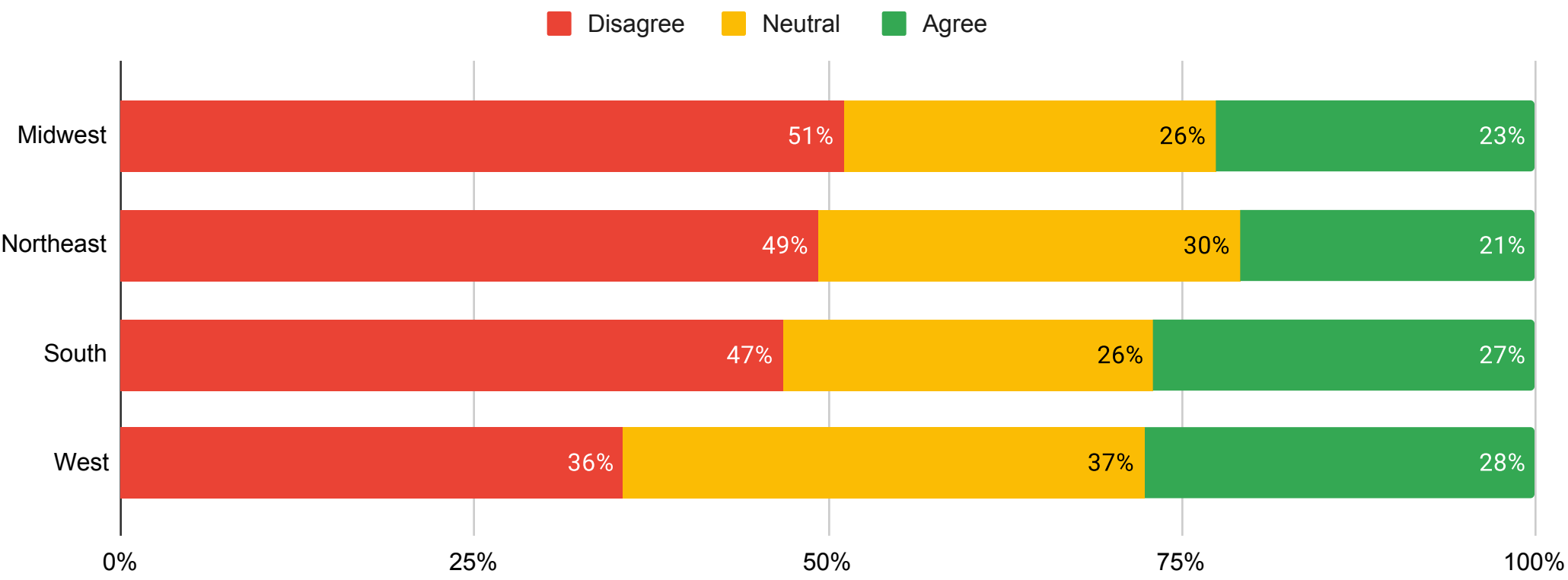
Overall



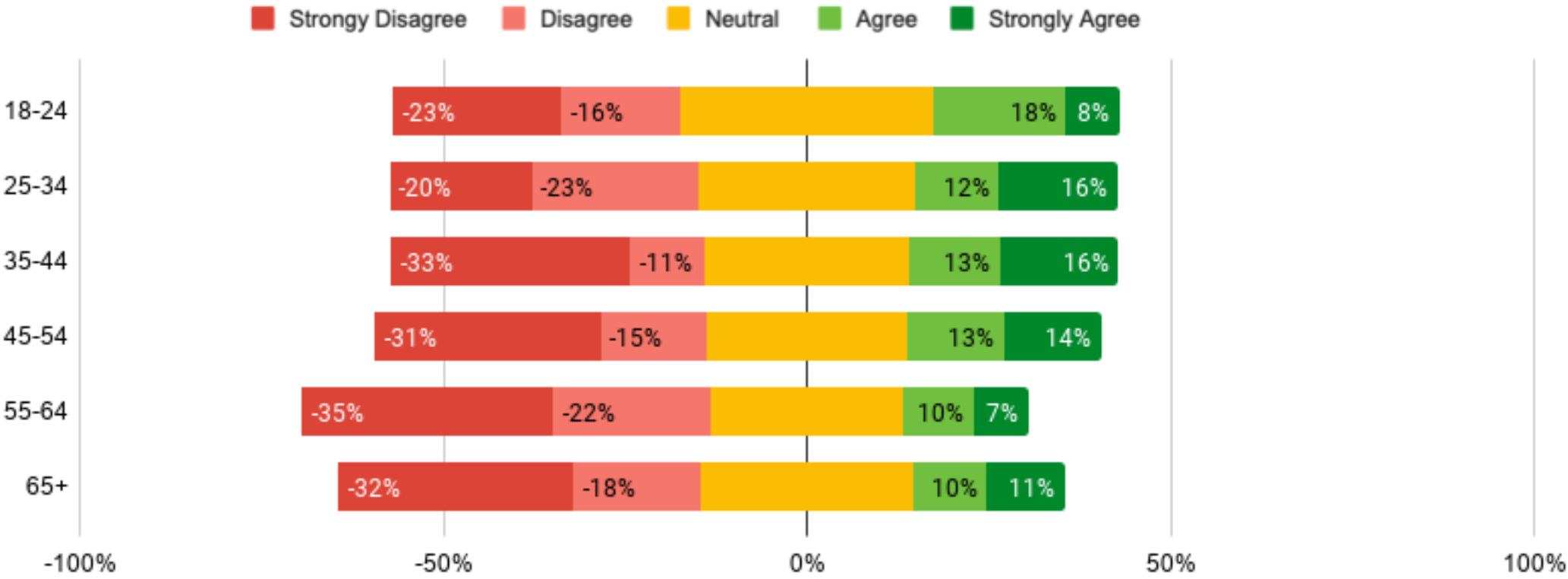
Gender Breakdown



Region Breakdown



Age Breakdown





# Virtual Reality Call with Family/Friends

Virtual Reality Technologies



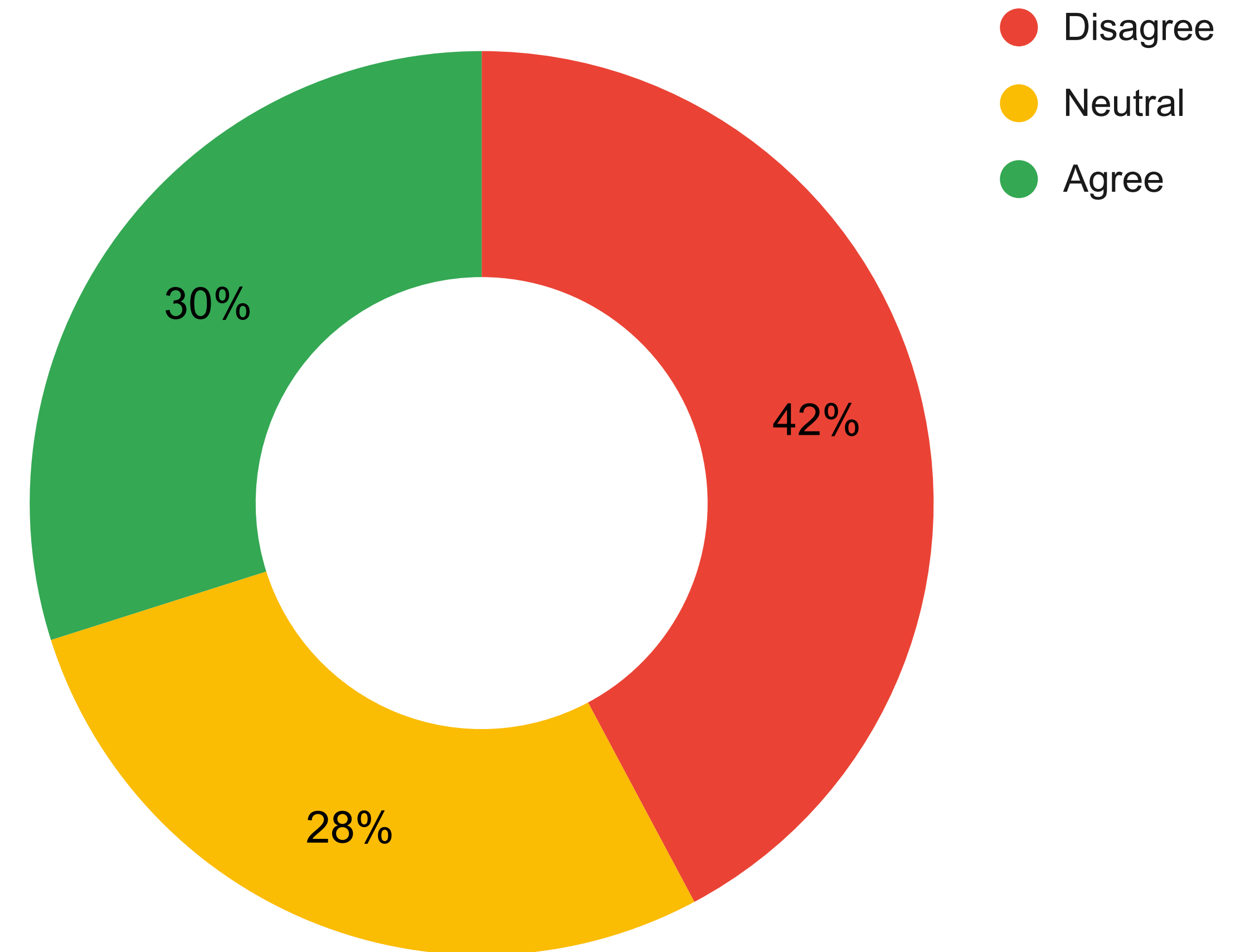




# Virtual Reality Call with Family/Friends

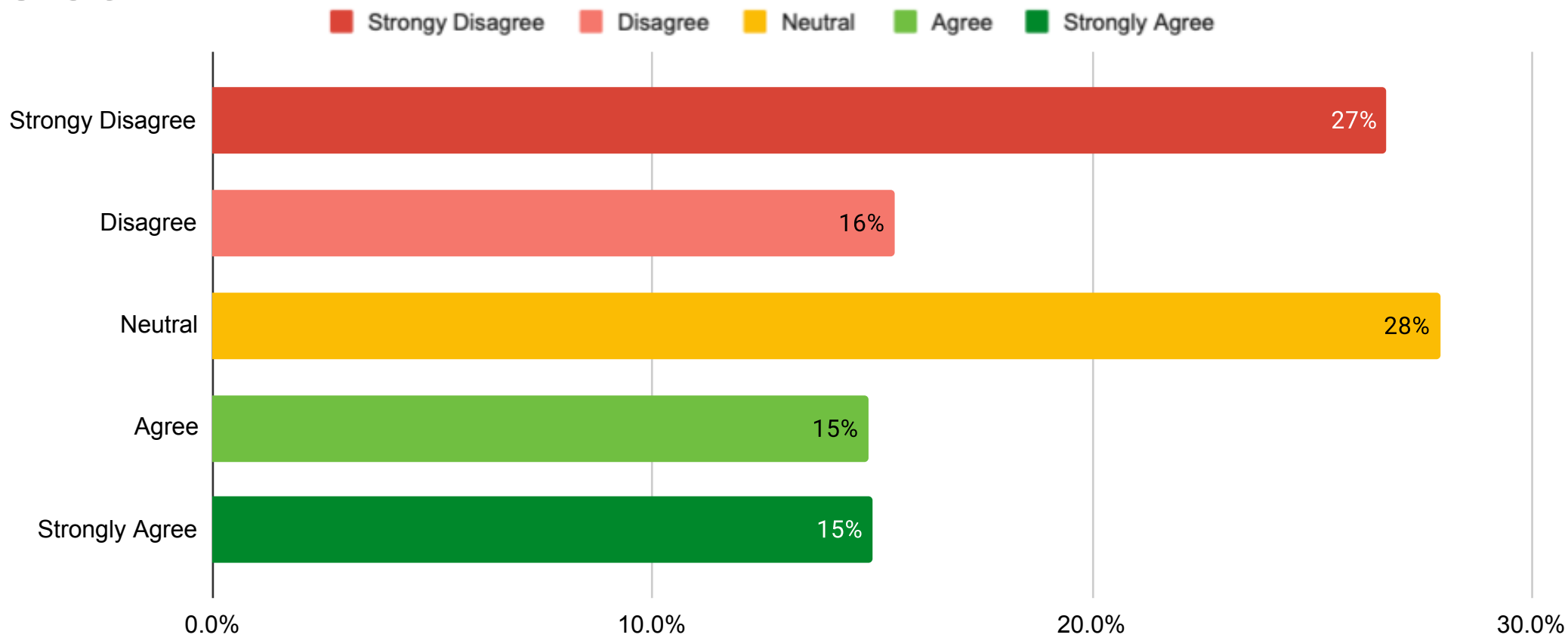
30% of respondents feel comfortable interacting with **Virtual Reality Call with Family/Friends**

(% of respondents who strongly agreed or agreed with the statement: “I feel comfortable interacting with this technology”)

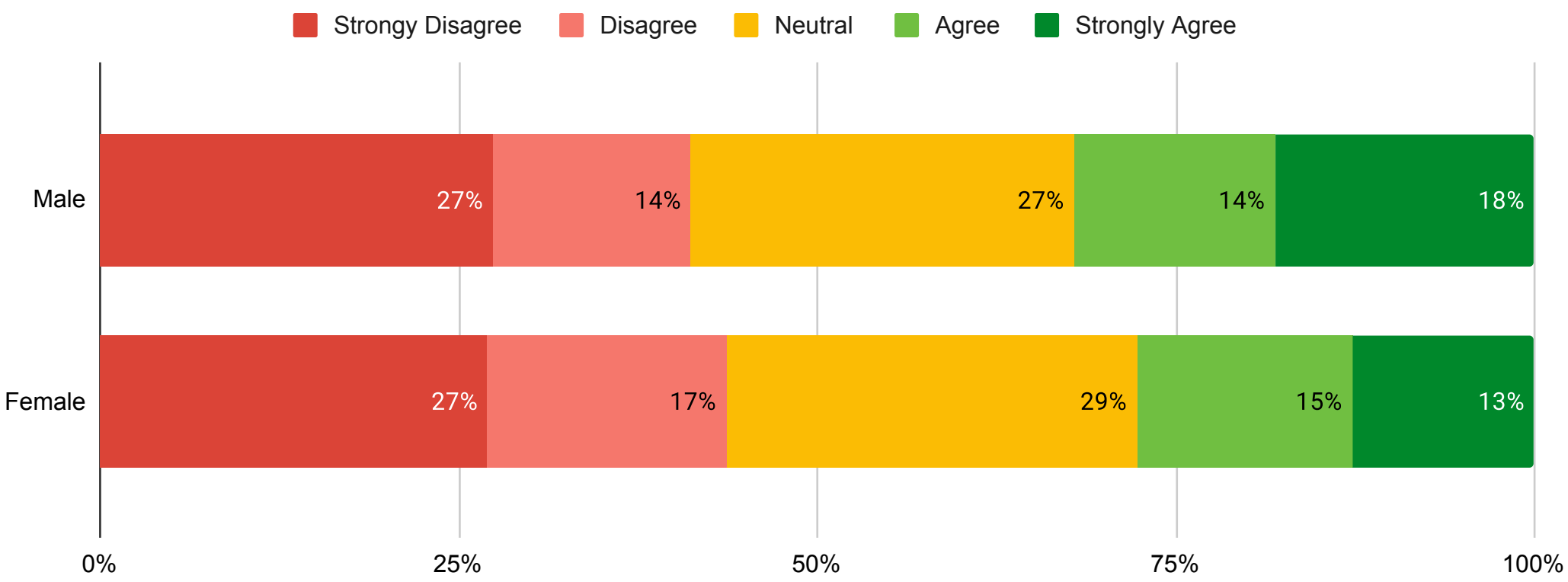




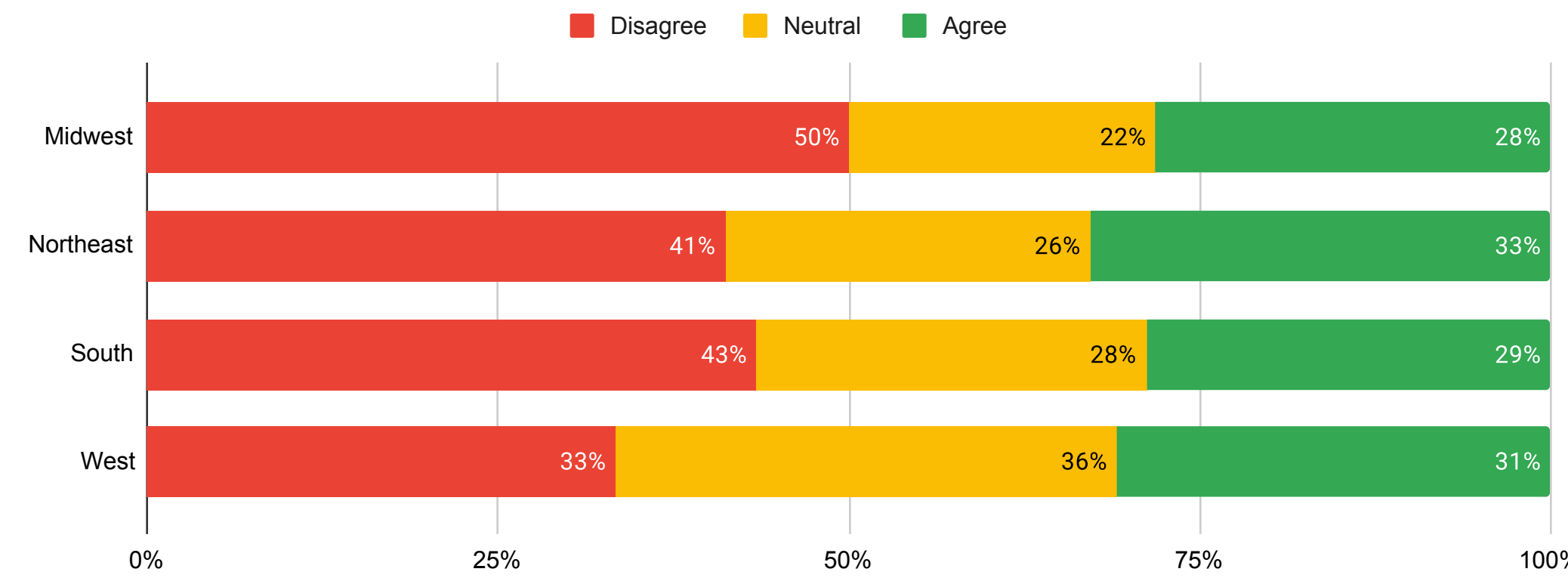
Overall



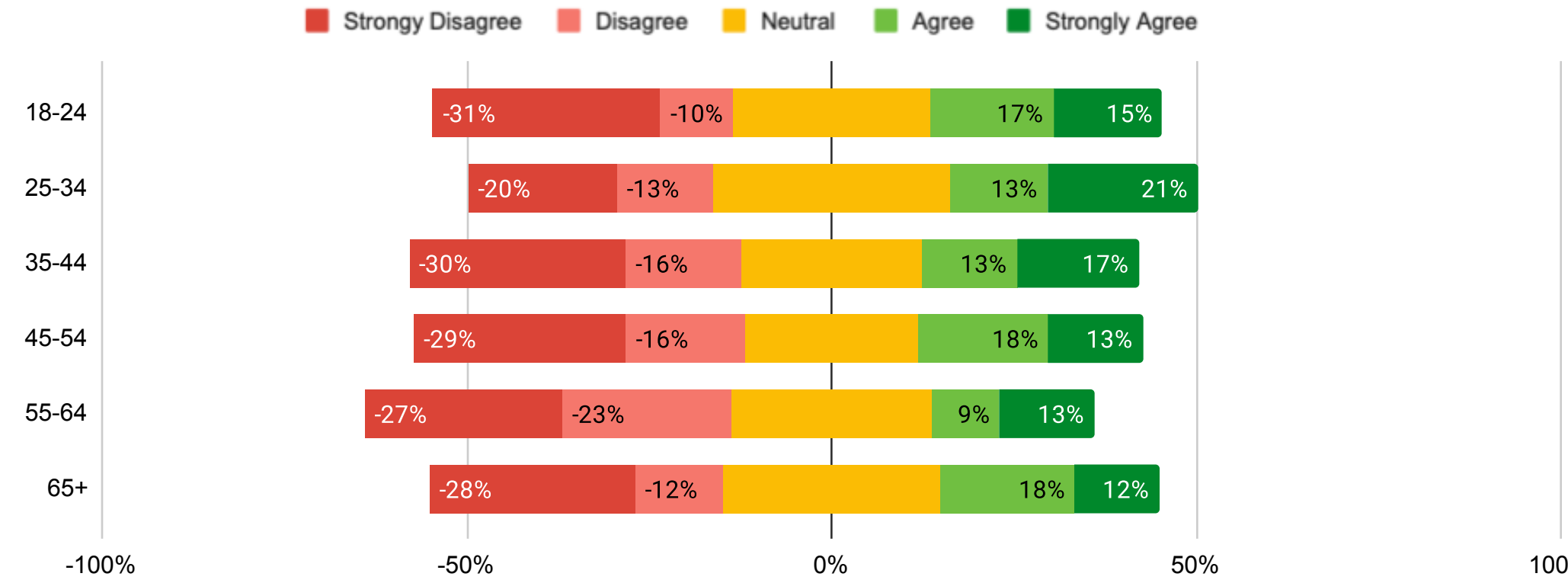
Gender Breakdown



Region Breakdown



Age Breakdown





# Virtual Reality Workplace

Virtual Reality Technologies

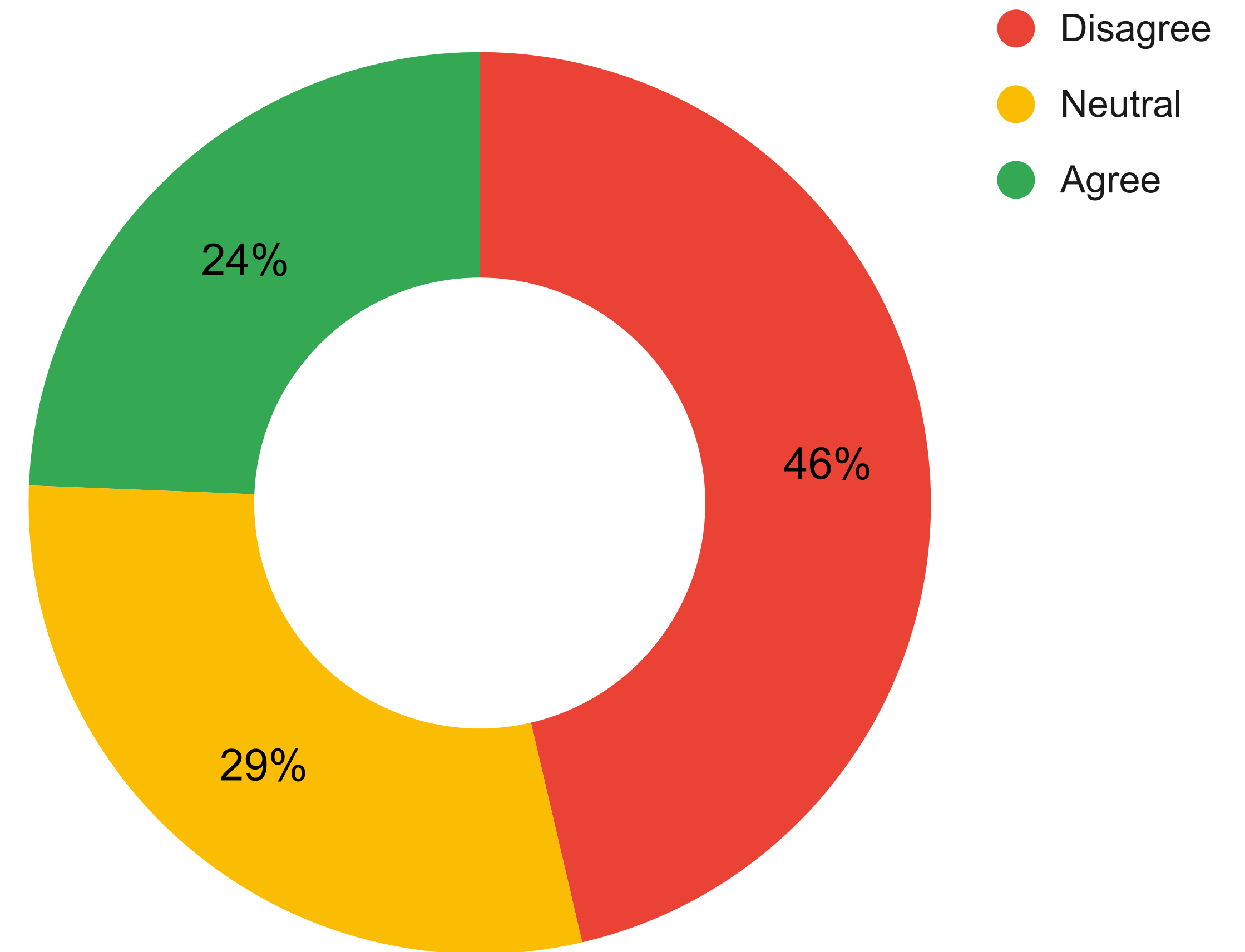




# Virtual Reality Workplace

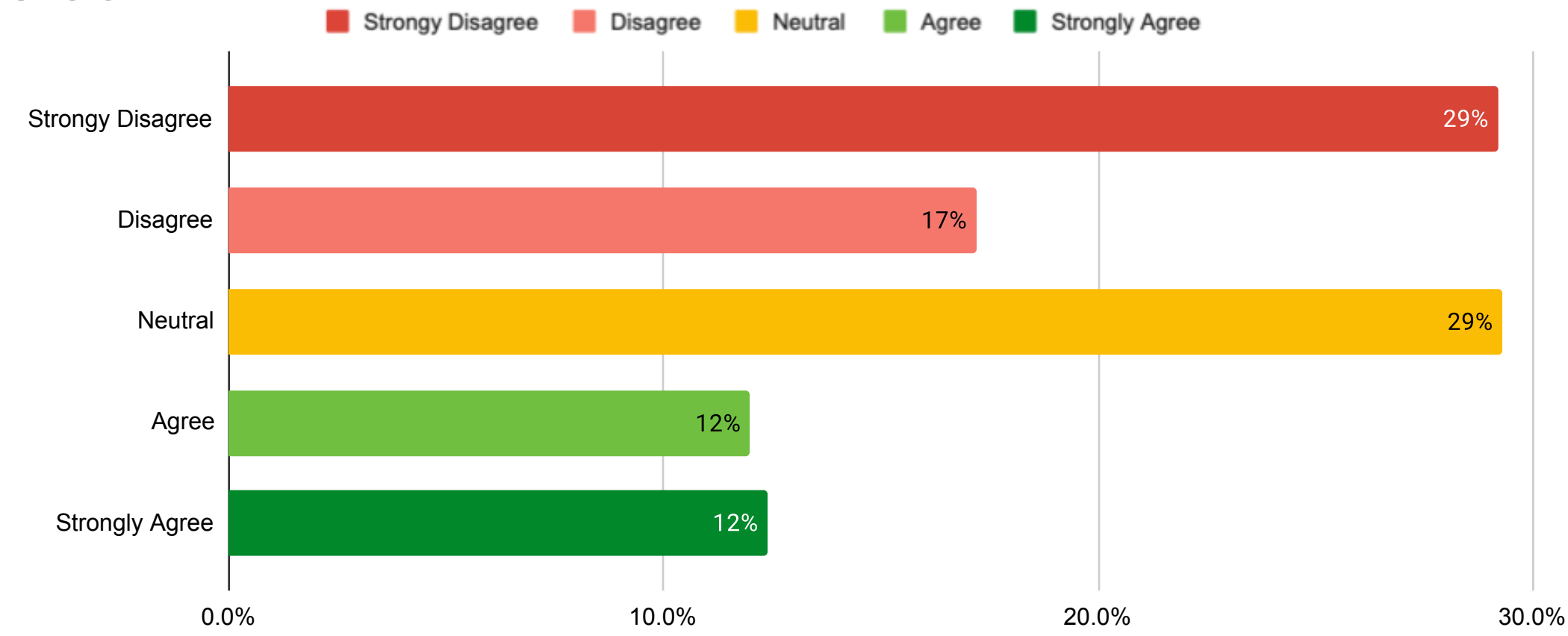
24% of respondents feel comfortable interacting with **Virtual Reality Workplace**

(% of respondents who strongly agreed or agreed with the statement: “I feel comfortable interacting with this technology”)

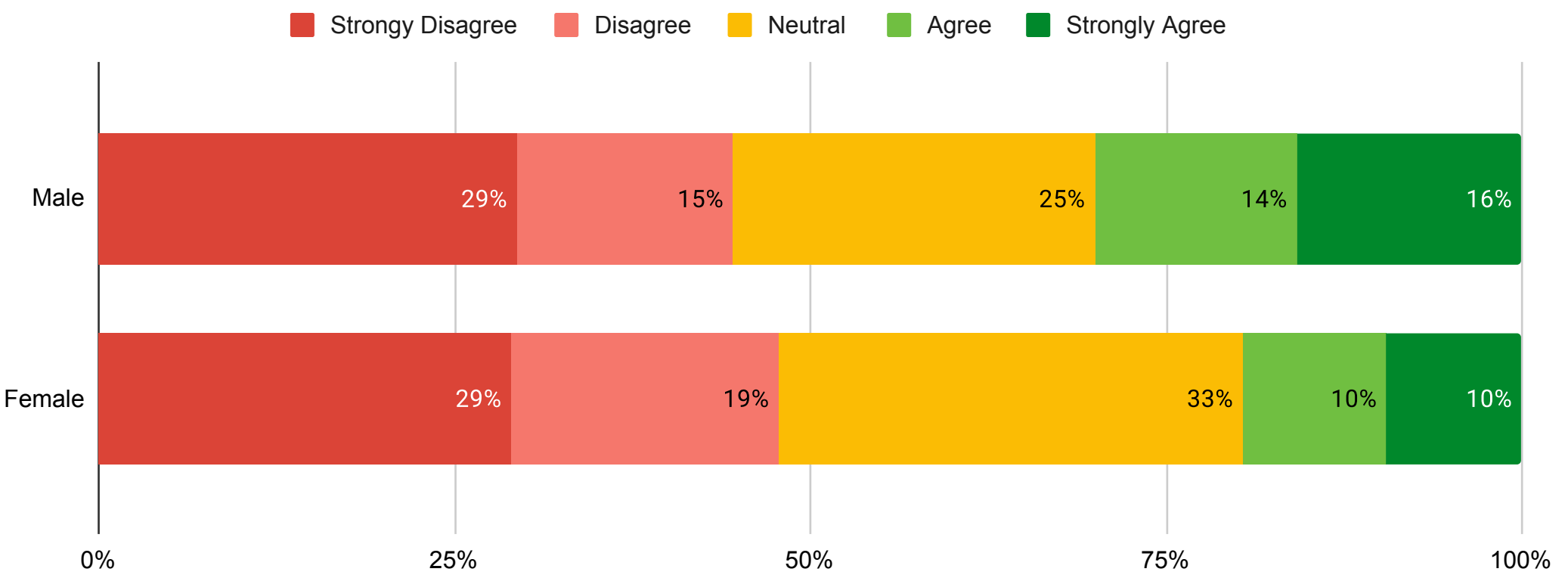




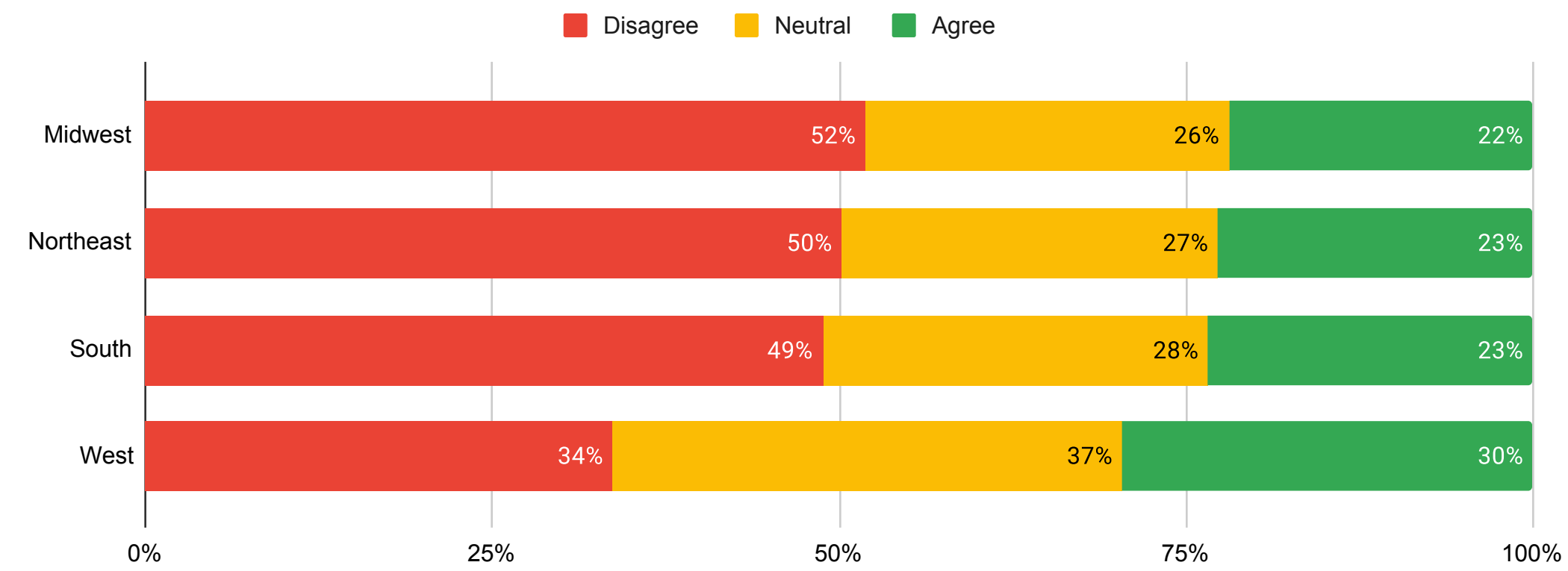
Overall



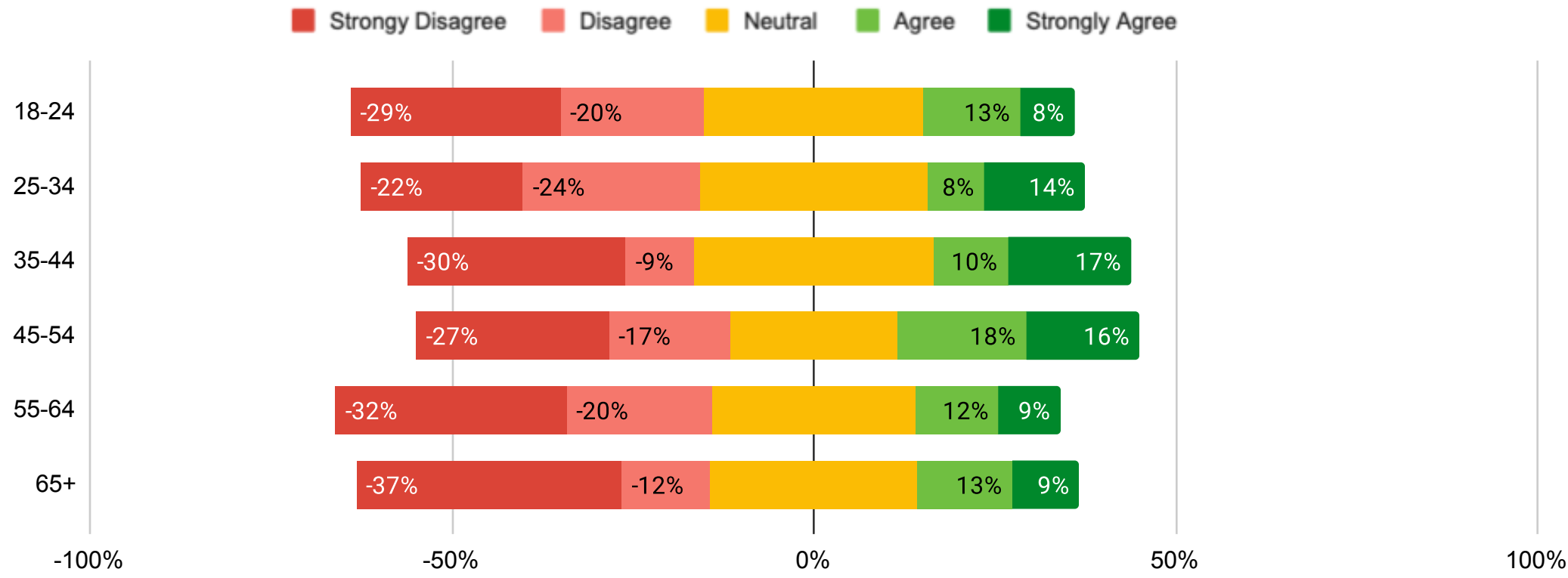
Gender Breakdown



Region Breakdown



Age Breakdown







# Methodology

Virtual Reality Technologies



# Methodology

- A total of 500 U.S. respondents aged 18–65+ completed a survey using Google Consumer Surveys in November 2020, on websites in the Google Surveys Publisher Network. [Responses have been weighted for age](#), gender and location to more closely represent the population and remove bias from the survey sample.
- The survey presented participants with a series of ten images and a short description of various forms of interactive technology, and asked them to rank on a five-point scale how strongly they disagreed or agreed with the statement: “I would feel comfortable interacting with this technology”.



**Myplanet**