



Hype or serious business?

Virtual Reality & Augmented Reality

[Market Research]

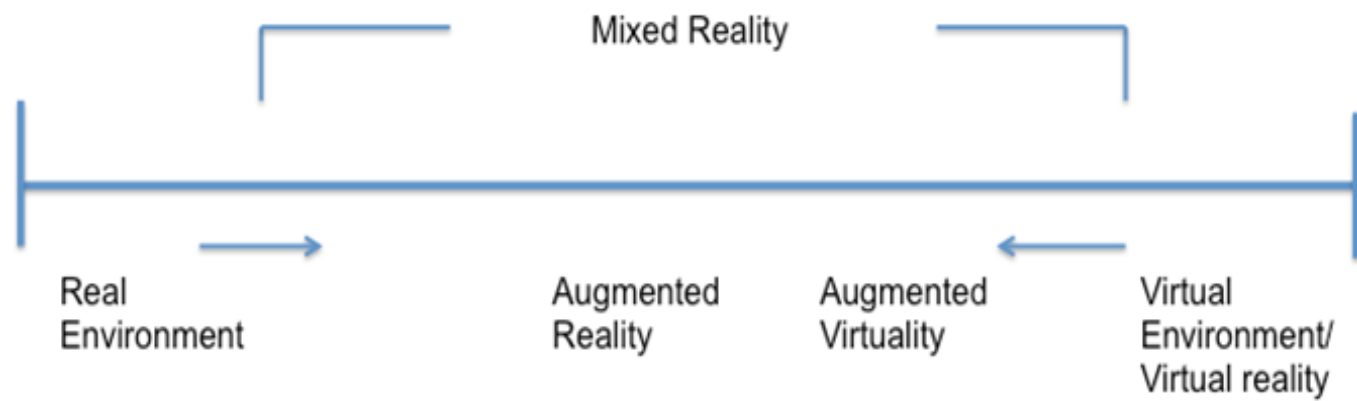
Coen Sanderink
T: @sanderink
E: csanderink@bom.nl
T: +31621163011

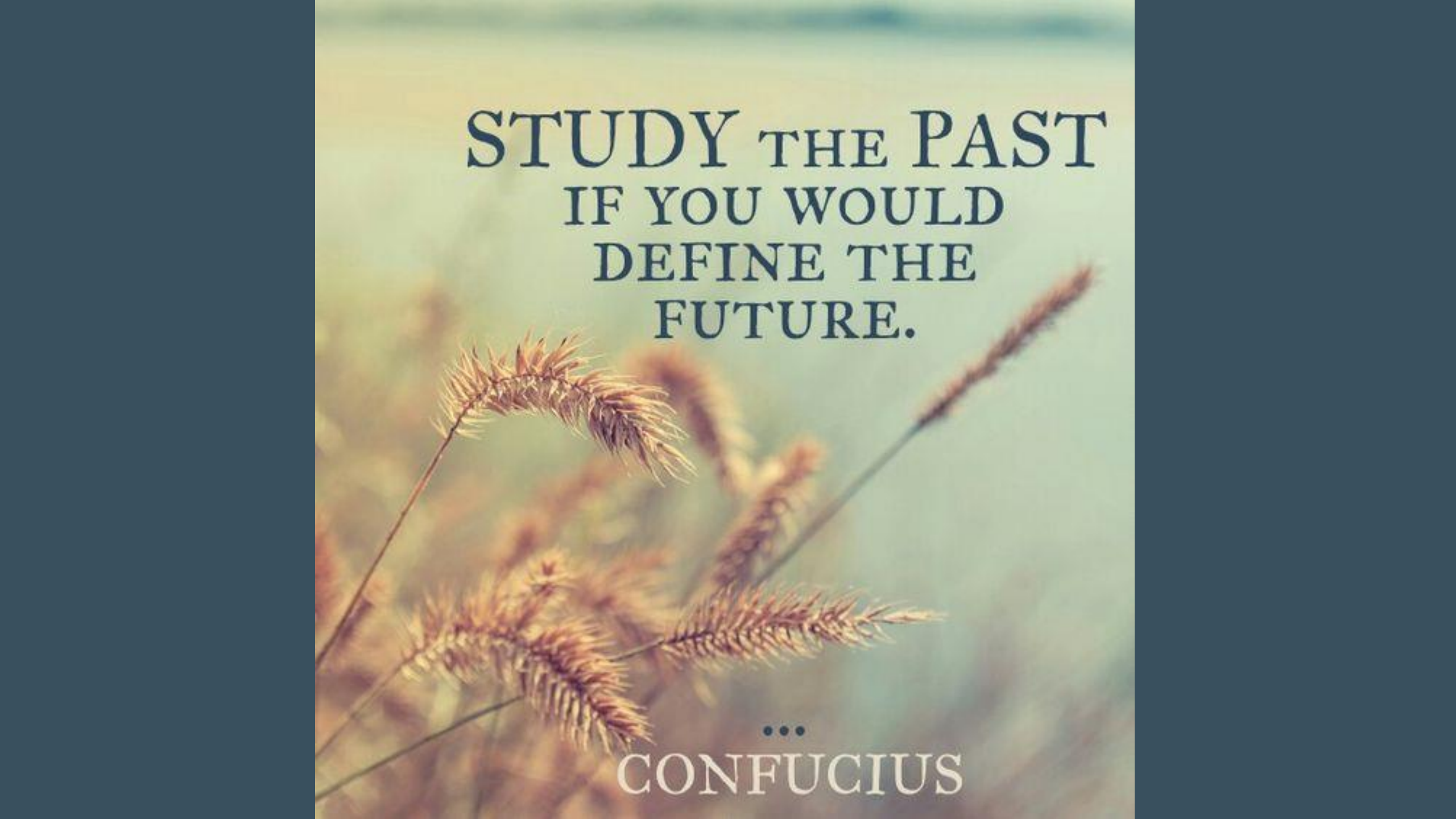


Brabantse Ontwikkelings Maatschappij



EXPERIENCES





STUDY THE PAST
IF YOU WOULD
DEFINE THE
FUTURE.

...
CONFUCIUS





Infrastructure



VR/AR 2017

=

Internet 1995



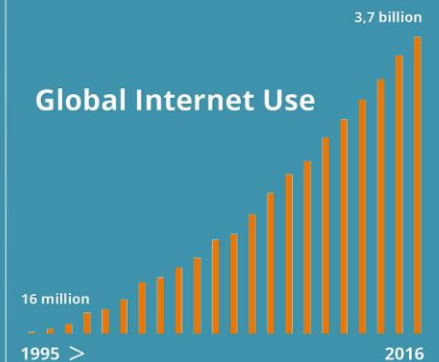
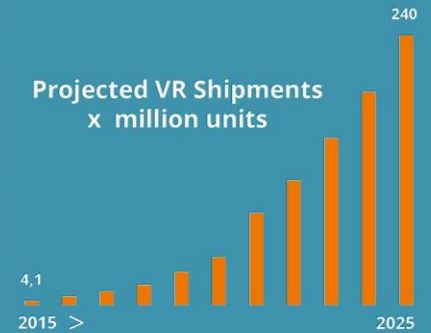
Tools & platforms



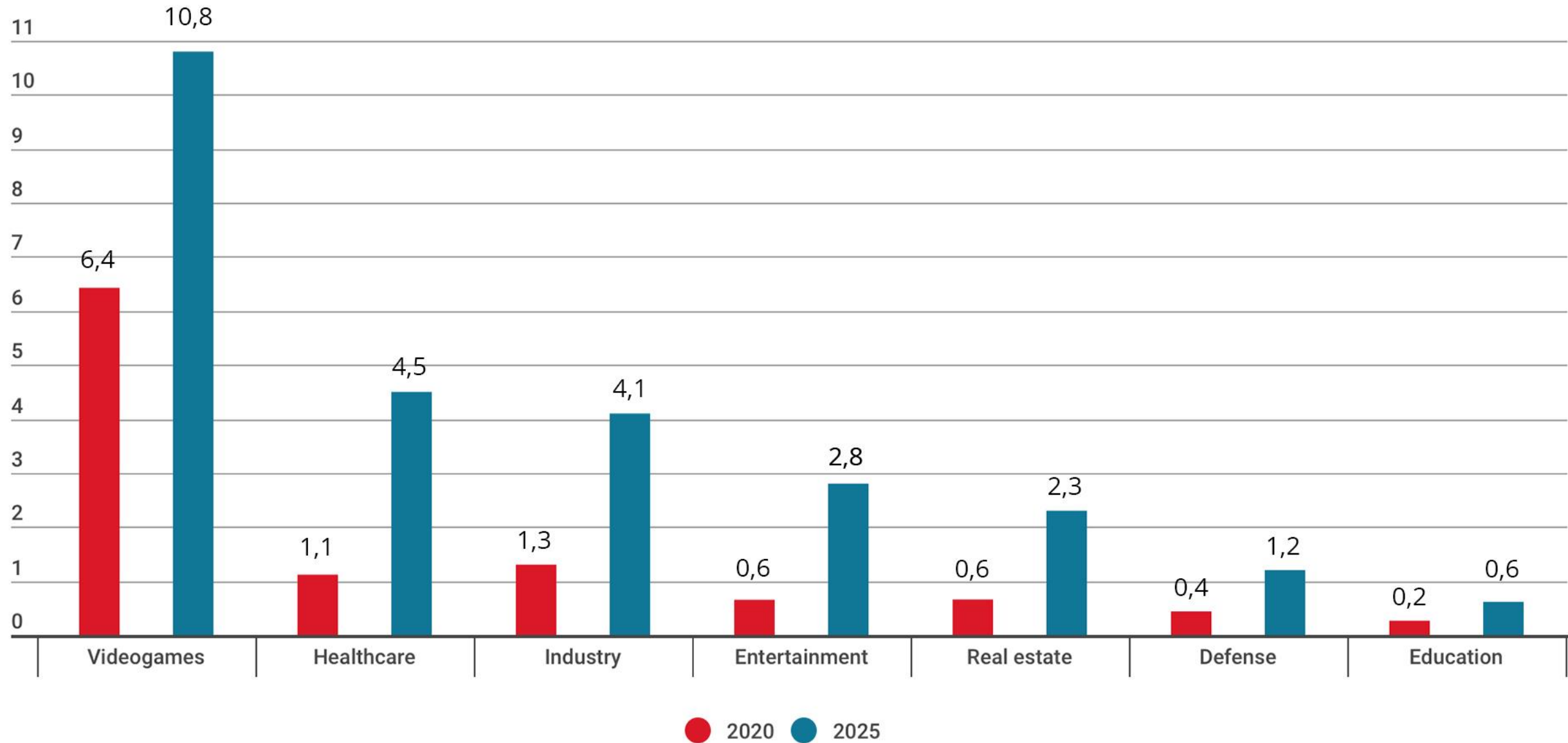
Applications & Content



Users



Projected VR/AR revenue by sector/branche x billion euros (Goldman Sachs, 2016)

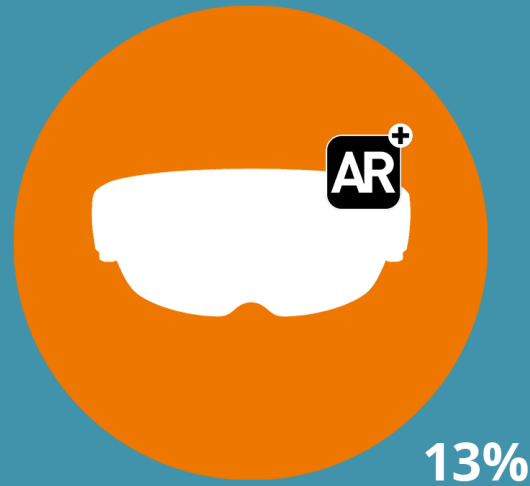


	R&D 2017: 36% -17%	Design 2017: 41% -4%	Prod. Oper. 2017: 29% +16%	Serv. Main. 2017: 40% +15%	Sales 2017: 35% +5%	Training 2017: 62% -1%
Production 29% +3%	Behavior	Interior	Complex tasks Defense	Remote Maintenance	Extra Experience	Simulation complex tasks
Pilot 71% -3%	Improve tasks Communication	Building Design	Exposure therapy Order picking	Complex tasks	Efficiency	Order Picking Safety instruction
Future	Virtual R&D		Real time info Immersive control			E-learning

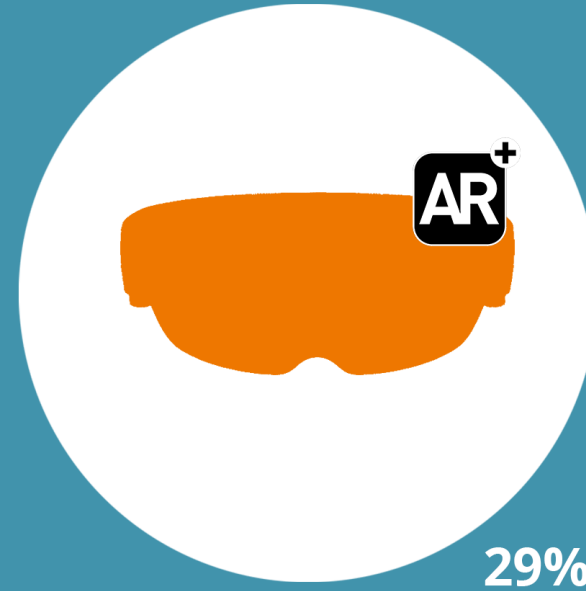
Model Based Enterprise

AR growth in operations

2016 AR use growth
in operations



2017 projected growth AR
use in operations



The increase in operations is an indication that the AR market is developing rapidly. In operations, AR as a technology is known to be more useful than VR.



Projected budget versus actuals

2016 (projection)



€ 41.000

2016 (actual)



€ 22.000

2017 (projection)



€ 24.000

Projected structural budget coming years 2016 vs 2017

2016 (projection)



€ 67.400

2017 (projection)



€ 28.800



GEM VISION PLATFORM CASE STUDY



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