



My Relevance

FirstPartner



Who I am:

Tim Ellis – Partner

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What we do:

FirstPartner is a Research and Go To Market Agency focussed on:

- Clearly defining market opportunities
- Building profitable, customer centric products and propositions
- Accelerating product launch
- Optimising marketing efficiency and effectiveness

Market Maps:

Our technique to communicate visually market structures, players and value chains. Examples are:

Free download:

www.firstpartner.net



Mobile Media



Location Based Services



mCommerce

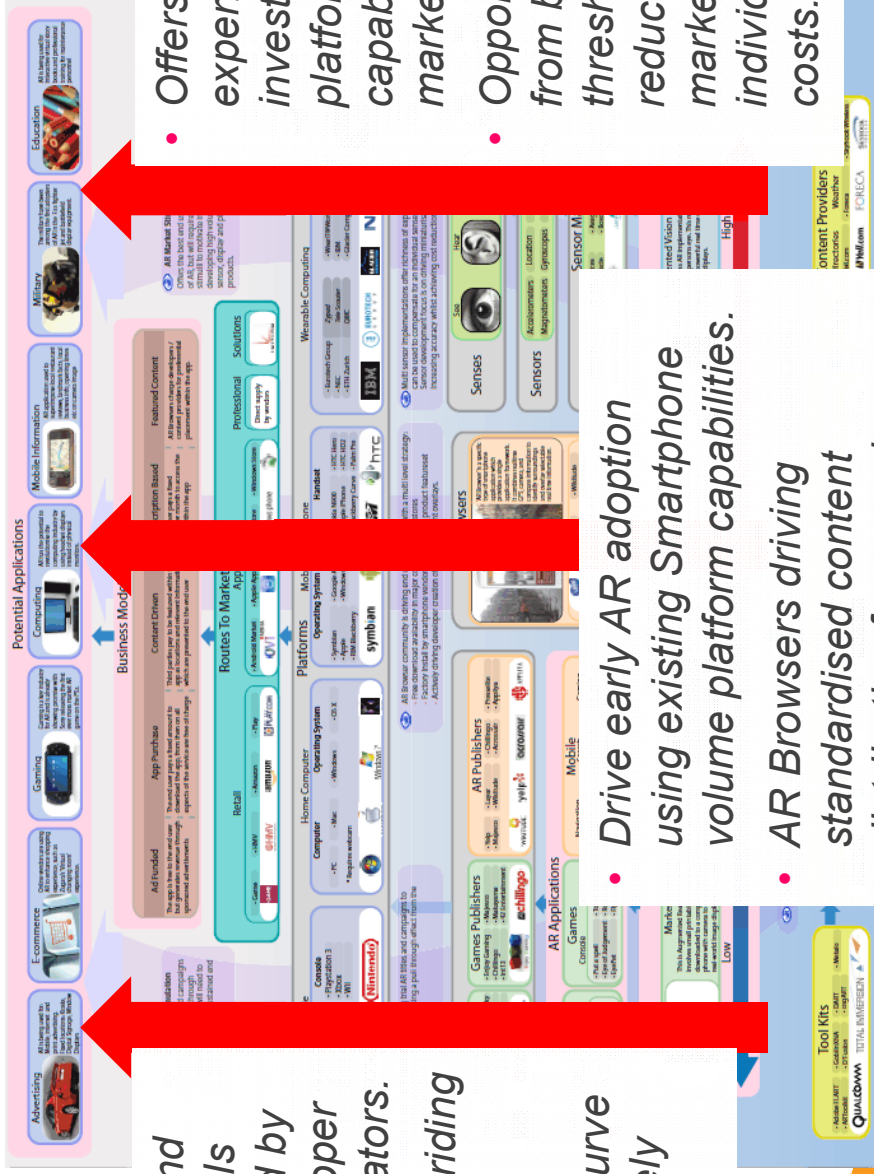
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AR Market Stimulation Drivers

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- Agency and media trials stimulated by AR developer demonstrators.
- Currently riding the early novelty learning curve to test likely adoption.

- Offers best AR experience but needs investment to drive platform cost and capabilities for mass market adoption.
- Opportunity emerging from both investment threshold and timing reduction as other markets drive down individual component costs.

- Drive early AR adoption using existing Smartphone volume platform capabilities.
- AR Browsers driving standardised content distribution frameworks

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Where are the Hot Spots likely to be?



- **Content**
 - ✓ Consumers want to be actively involved in content
 - ✓ Compelling AR experience with optimised content and multi sense capabilities
 - ✓ Sensor technology price points being driven down for platform roadmaps
 - ✓ Trial marketing underway to test market expectations and investment timing
- **e-Tailing**
 - ✓ AR fitting room to try on individual or combinations of virtual clothes
 - ✓ Needs simple AR experience to drive user adoption
 - ✓ Reduce costs of high unwanted merchandise return rates
- **Telematics**
 - ✓ Full windscreen display at a mass market component price point exists
 - ✓ Multi sense information sources already being integrated
 - ✓ Development roadmap progression from Head Up displays





Key Take Aways

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- Mass market currently **underwhelmed** by what they **can** have, and **overwhelmed** by what they **cant** have!
 - Augmented Reality applications have to prove their relevance to move from novelty to adoption
 - Don't underestimate the gradient of the AR development curve - its past R&D concept
- Simple user adoption still not there – but signs that it will exist
 - Markers not understood and inconvenient
 - Increased focus on “AR ready” platforms
- Why is AR focused on the vision sense?
 - Potential for some early AR wins using other primary senses
- Markets tend to take off when multiple stimuli and enablers come into play

