VR on the rise

We are on the brink of a new device revolution

2016 was named as the year of virtual reality. Tech giants like HTC, Oculus, Sony and Google all presented a VR headset making it possible to explore this new 360° world. In this study, you will see that the adoption of virtual reality is taking root in the UK and US whereas in the Nordics it is still just an afterthought.

However, while virtual reality hasn’t gained ground in the Nordics, the smartwatch has. In the last year, the penetration of smartwatches has increased massively. Across the Nordics, the smartwatch penetration has doubled from 2016 to 2017.

The question for the media industry is how these new devices will affect the media consumption and how we can adapt to a reality with several computers and mobile devices for one person, and not just think about one device and one cookie for one person. Now we face a reality of even more possible devices and there is no doubt that the ability to identify people across not only computers and mobiles, but also smart TVs, smartwatches and virtual reality devices will be increasingly important in the future.

In the following pages, you can learn more about the revolution taking place. Enjoy!

Rune Werliin
Head of Marketing & Communication @ AudienceProject
In average, the Nordic, UK and US population have more than 7 devices with internet access in their households. With around 2,2 mobiles in each household the number of mobiles exceeds the number of computers.
Average number of devices with internet access in households

- Denmark: 7.1
- Sweden: 7.0
- Norway: 8.2
- Finland: 6.5
- UK: 7.3
- US: 7.7

Legend:
- Dark green: Computer
- Blue: Tablet
- Gray: Mobile
- Pink: Video game console
- Yellow: Smart TV
- Light gray: Virtual reality device
- White: Other
In general, the computer and mobile penetration is higher in the Nordics than in UK and US, while the video game console and smartwatch penetration is higher in UK and US than in the Nordics.
### Average device penetration in Nordic, UK and US households

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer</td>
<td>88%</td>
</tr>
<tr>
<td>Tablet</td>
<td>72%</td>
</tr>
<tr>
<td>Mobile</td>
<td>93%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>60%</td>
</tr>
<tr>
<td>Video game console</td>
<td>32%</td>
</tr>
<tr>
<td>Smartwatch</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: AudienceProject Insights 2017
Computer penetration in households

- **Denmark**: 95%
- **Sweden**: 95%
- **Norway**: 94%
- **Finland**: 95%
- **UK**: 85%
- **US**: 89%
The computer penetration in the Nordic households has slightly decreased in the last couple of years.

<table>
<thead>
<tr>
<th>Country</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>98%</td>
<td>98%</td>
<td>95%</td>
</tr>
<tr>
<td>Sweden</td>
<td>98%</td>
<td>97%</td>
<td>95%</td>
</tr>
<tr>
<td>Norway</td>
<td>97%</td>
<td>96%</td>
<td>94%</td>
</tr>
<tr>
<td>Finland</td>
<td>97%</td>
<td>96%</td>
<td>95%</td>
</tr>
</tbody>
</table>

AudienceProject Insights 2017
Tablet penetration in households

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>70%</td>
</tr>
<tr>
<td>Sweden</td>
<td>68%</td>
</tr>
<tr>
<td>Norway</td>
<td>76%</td>
</tr>
<tr>
<td>Finland</td>
<td>63%</td>
</tr>
<tr>
<td>UK</td>
<td>74%</td>
</tr>
<tr>
<td>US</td>
<td>65%</td>
</tr>
</tbody>
</table>
The tablet penetration in the Nordic households has slightly increased in the last couple of years.
Mobile penetration in households

- Denmark: 94%
- Sweden: 96%
- Norway: 96%
- Finland: 93%
- UK: 90%
- US: 81%
The mobile penetration has slightly decreased in DK and FI and slightly increased in SE and NO in the last couple of years.
Smart TV penetration in households

- Denmark: 60%
- Sweden: 48%
- Norway: 63%
- Finland: 51%
- UK: 59%
- US: 56%
Video game console penetration in households

- Denmark: 30%
- Sweden: 32%
- Norway: 40%
- Finland: 35%
- UK: 45%
- US: 46%

[Image of a video game controller with a bar chart showing penetration rates in different countries.]
The video game console penetration in the Nordic households has slightly increased in the last year.

<table>
<thead>
<tr>
<th>Country</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>Sweden</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Norway</td>
<td>31%</td>
<td>40%</td>
</tr>
<tr>
<td>Finland</td>
<td>36%</td>
<td>35%</td>
</tr>
</tbody>
</table>
Smartwatch penetration in households

- Denmark: 5%
- Sweden: 8%
- Norway: 12%
- Finland: 7%
- UK: 11%
- US: 14%
The smartwatch penetration in the Nordic households has doubled in the last year.

- **Denmark**: 3% (2016) → 5% (2017)
- **Sweden**: 4% (2016) → 8% (2017)
- **Norway**: 5% (2016) → 12% (2017)
- **Finland**: 4% (2016) → 7% (2017)
Virtual reality is on the rise - especially in the UK and US. The majority use their virtual reality device for playing games and watching video. Few use the device for professional work and other purposes.
Virtual reality device penetration in households

- Denmark: 2%
- Sweden: 1%
- Norway: 3%
- Finland: 1%
- UK: 5%
- US: 8%
Virtual reality device penetration among men than women

<table>
<thead>
<tr>
<th>Country</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Sweden</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Norway</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Finland</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>UK</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>US</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

NOTE:
The colored part of the bar indicates a 95% confidence interval. As the share of people with access to VR is very low in the Nordics, the variance can lead to a proportionally bigger change.
Virtual reality device penetration across age groups
What virtual reality devices are used for across the Nordics, UK and US

- Playing games: 70%
- Watching video: 74%
- Professional work: 8%
- Other purposes: 11%
What virtual reality devices are used for in the Nordics, UK and US respectively.

- Playing games:
  - Denmark: 51
  - Sweden: 63
  - Norway: 51
  - Finland: 75
  - UK: 54
  - US: 85

- Watching video:
  - Denmark: 55
  - Sweden: 50
  - Norway: 50
  - Finland: 61
  - UK: 79
  - US: 7

- Professional work:
  - Denmark: 3
  - Sweden: 11
  - Norway: 6
  - Finland: 8
  - UK: 29
  - US: 24

- Other purposes:
  - Denmark: 9
  - Sweden: 18
  - Norway: 10
  - Finland: 16
  - UK: 2
  - US: 3
Methodology

The study is a part of AudienceProject Insights 2017. Data is collected through online surveys done in Q1 2017. The respondents have been selected from our Nordic, UK and US panels consisting of more than 1 million panelists and weighed to achieve representativity on the more than 14,000 respondents who completed the survey.