New Opportunities in Reality Computing
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Reality Computing is a new market category emerging around high-resolution spatial and shape data. This is the kind of data that comes from spatial sensing devices (think Kinect, Google Tango, Faro laser scanners, Google self-driving cars, GoPro cameras on drones used for photogrammetry…) and also leads to many kinds of numerically controlled fabrication (think 3D printing, numerically controlled milling, robotics…). Reality Computing is the result of combining increasingly accessible sensing and fabrication technologies combined with growing computing power.

A $5B market today, Reality Computing is conservatively projected to grow to at least $11B by 2018.

Just like the transformation of the music industry catalyzed by the introduction of MP3 in the 1990s, digital versions of physical objects and environments are poised to transform the work and play of anyone who designs, produces, manages or interacts with physical stuff.

One example of a successful startup based on spatial sensing and digital fabrication—what would be called a Reality Computing play today—is Brontes Technologies acquired in 2006 by 3M for $95 million. This has been launched by 3M as a suite of tools for chair-side production of dental crowns, turning what was formerly a weeks-long process involving messy dental impressions, temporary prostheses, and off-site fabrication into an all-digital process that can be accomplished in a dental office in just a few hours.

Another example is Alton Lane, a bespoke menswear business that has replaced traditional tailor measurements with a full body scan, and traditional fabric swatches with high-resolution material scans.

By considering the component technologies under a systematic, overarching category, investors can better understand the affect these will have on markets, businesses and careers in the near future, and better prepare to make strategic decisions in this area.

Mr. Rundell will provide a short overview of the technologies involved and the opportunities Autodesk sees for investment in this area, and is seeking input from the angel investing community on how they see this category developing.