

Serious Games - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Serious Games Market size is estimated at USD 14.06 billion in 2024, and is expected to reach USD 43.65 billion by 2029, growing at a CAGR of 25.43% during the forecast period (2024-2029).

It is considered that using serious games in various end-user sectors like education, training, problem recognition, improved problem-solving skills, social skills, teamwork skills, and decision-making could be quite advantageous.

Key Highlights

- The market for enterprise gaming systems is anticipated to expand significantly during the forecast period. These technologies are also employed for employee training, along with the use of gaming by SAP to teach its staff about sustainability. Advanced technologies are also influencing the financial services industry to adopt serious gaming. The goal is to reduce the complexity involved in simulation training across investment decision-making. It is made possible by making the offers and products intuitive.
- Regardless of the age of consumers, the vendors in the market have been providing new and improved games that are intended for educational reasons. For instance, Fiscal Ship pushes players of all ages to steer the government budget toward sustainability and hence was selected as one of the best educational games to play during the pandemic by the New York Post.
- Some key elements promoting the rise of serious games in the APAC area include the increasing demand for mobile-based serious gaming, rising awareness regarding serious games & the Game-Based Learning (GBL) approach, and the growing investment by big players in the sector. Over the course of the projection period, it is also anticipated that the appearance of the COVID-19 pandemic, widespread lockdowns, and government-supported instructional gaming in numerous nations will accelerate the adoption of serious games in the region.
- Multiple serious games were launched recently, focusing primarily on the wellness and healthcare sector. For instance, in healthcare, Sea Hero Quest, a free game, uses play data to detect dementia at an early stage. In addition, the game Underground,

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developed by Grendel Games, is a publicly available game that trains for surgical procedures via a custom-made game controller. This controller simulates the movement of the hardware. Such steps prove to be an affordable and effective training tool for healthcare trainees.

-The use of serious gaming has extended beyond its traditional scope of marketing, as they are extensively used in advanced applications, like crowdsourcing. For instance, Tomnod, a digital initiative, used HD images taken by digital globe satellites to localize things and locations in the wake of natural disasters. One of the searches launched focused on finding the missing Malaysia Airlines plane, MH370, in the Indian ocean. The map recorded over 257 million views, with over 2.9 million areas tagged by players and three million people actively participating in the search.

-The COVID-19 outbreak caused school closures all across the world. Moreover, during the pandemic time, the remarkable rise of e-learning, where teaching is delivered online, and through digital platforms and media, education has undergone a significant transition. Sadly, this has been lowering pupils' interest in learning. E-learning platforms incorporate various serious games to overcome this problem and increase learning engagement. The BYJU'S e-learning platform in India claims that over time, it has been noticed that the skillful integration of games has enhanced student engagement and motivation for learning, especially among younger pupils.

Serious Games Market Trends

Learning and Education Application to Witness Significant Growth

- In recent times, digital games and simulations have grown in popularity for being the most effective and highly engaging learning environment. The overall production of these serious games requires dynamic and complex constructions with suitable designs of multimodal context & interesting interactions with productive pedagogical strategies to preserve the total learning efficacy.

- Furthermore, in the education & learning ecosystem, the total need for game concepts, such as scores, competition, challenges, rules, and levels, is encouraging the manufacturers to build solutions to address & accommodate the key pedagogical functional variables, like instructional support, feedback, guidance, self-regulation, attention, cognitive flow, and assessment.

- Serious games are widely emerging as a powerful learning tool. They are experiencing increasing popularity in the recent times due to the cost-effective alternative to classroom-based learning for knowledge acquisition and perceptual, behavioral, affective, cognitive, physiological, motivational, and social learning outcomes.

- Moreover, Grendel Games built a serious game that achieves behavioral change. For example, one of the games, 'Garfield's Count Me In,' is primarily designed for students in primary education and thus assists them in doing repetitive math exercises. It is mainly based on the learning methodology 'Het Rekenmuurtje' ('Math Wall') and is specially designed by educational advisers.

- Furthermore, in May 2021, the National Cyber Security Centre (NCSC) introduced a new educational game, CyberSprinters, for teaching cyber security at primary schools, youth organizations, and clubs. The CyberSprinters is an interactive game mainly aimed at 7 to 11-year-old learners.

Asia Pacific to Have a Significant Market Growth

- The rise in the awareness regarding serious games or the Game-based Learning (GBL) concept, the increase in the investment by the major players into the segment, and the surge in demand for mobile-based serious gaming are some of the vital factors driving the overall growth of serious games market in the Asia-Pacific region. The nationwide lockdowns, the recent COVID-19 pandemic, and the government enhancing educational gaming within the country are some key factors expected to boost the total adoption of serious games in the region throughout the forecast period.

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- Additionally, the Asia-Pacific region is predicted to experience a strong growth rate of 25.38% in the studied market. Asia-Pacific has also been a major adopter of technological advancements. The market studied in these developing economies thus is expected to possess various key opportunities in the future.
- The healthcare division sector is one of the most targeted industries for the increased use of serious games. Serious games can now effectively impart important procedural and cognitive abilities to interdisciplinary healthcare workers due to simulation and visualization technologies.
- In order to allow the development & implementation of serious games in healthcare and for healthcare professionals to use gamification in healthcare, SIMS (SingHealth Institute of Medical Simulation) cooperated with the Serious Games Association (SGA), a not-for-profit, volunteer-driven international society organization in Singapore.
- On the vendor front, multiple regional startups are merging to overlook the development of applications across serious gaming applications. For instance, SIMS and SGA had also declared a collaboration to organize the RICH Games 2022, a conference for the Southeast Asian region that offers emerging solutions and innovations to advance healthcare education.

Serious Games Industry Overview

The Serious Games Market is highly competitive, which is mainly due to the existence of various prominent players operating globally. The market is moderately concentrated, with players adopting acquisitions, mergers, and service innovation strategies. Major players are Diginext (C.S. Group), Designing Digitally Inc., and Cisco Systems, among others. Recent developments in the market are -

- February 2022 - Brightcove Inc., the industry pioneer in business video, announced that it had acquired Wicket Labs, a provider of audience insights that allows users to view subscription and content analytics.
- July 2021 - Computing students at the University of Kent developed a serious game for Cyber Security education. The serious game, SherLOCKED was created in a 2D top-down puzzle adventure and is primarily built to consolidate students' foundational security-related ideas and concepts.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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