

Ambient Insight



Serious Play 2011 Plenary Session Chasing the Platform

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Ambient Insight's Learning Technology Research Taxonomy

Eight Buyer Segments

Consumer	PreK-12	Higher Education	Corporations and Businesses	Federal Government	State and Local Government	Associations, NGOs, and Non-Profits	Healthcare

Buy Eight Types of Pedagogically-defined Learning Products

Self-paced eLearning Courseware	Digital Video, Text, & Audio Reference	Collaboration-based Learning	Social Learning	Simulation-based Learning	Game-based Learning	Cognitive Learning	Mobile Learning

From Four Types of Suppliers

Packaged Content	Custom Content Services	Software as a Service (SaaS)	Tools and Installed Technology



The Five-year Horizon

- “All roads lead to mobile,” but the PC isn’t going anywhere (soon) – “modest, but steady growth”.
 - That said, the tablets and eReaders change everything
- “All roads lead to HTML5,” but Flash isn’t going anywhere (soon)
 - Within 60 days, every major mobile browser on the market will support HTML5
- “Tablets are the new gaming device,” but handheld gaming devices and the consoles aren’t going anywhere (soon)
 - 8.5 million Nintendo DS devices sold in the US in 2010



Key Findings: Game-based Learning Market

- **Mobile packaged edugames** are already outselling non-mobile (PC/web/console) edugames:

Packaged Content	5-year CAGR	2015
Non-mobile Edugames	0.07%	\$82.0 million
Mobile Edugames	15.2%	\$238.2 million



Game-based Learning Leading Indicators: Five-Year Horizon

- We see companies using Flash and mainstream gaming engines like Unity to create edugames
- Several “Rapid Learning” tools include game modules based on classic games (Jeopardy, Concentration, etc.) and they output to both Flash and HTML5
- **Opportunity:** In the last 18 months dozens of new Mobile Learning tools have come on the market and **only one** is game-based: University of Wisconsin’s ARIS game engine
- Location-based Learning and Mobile Augmented Reality newest trends in mobile edugames

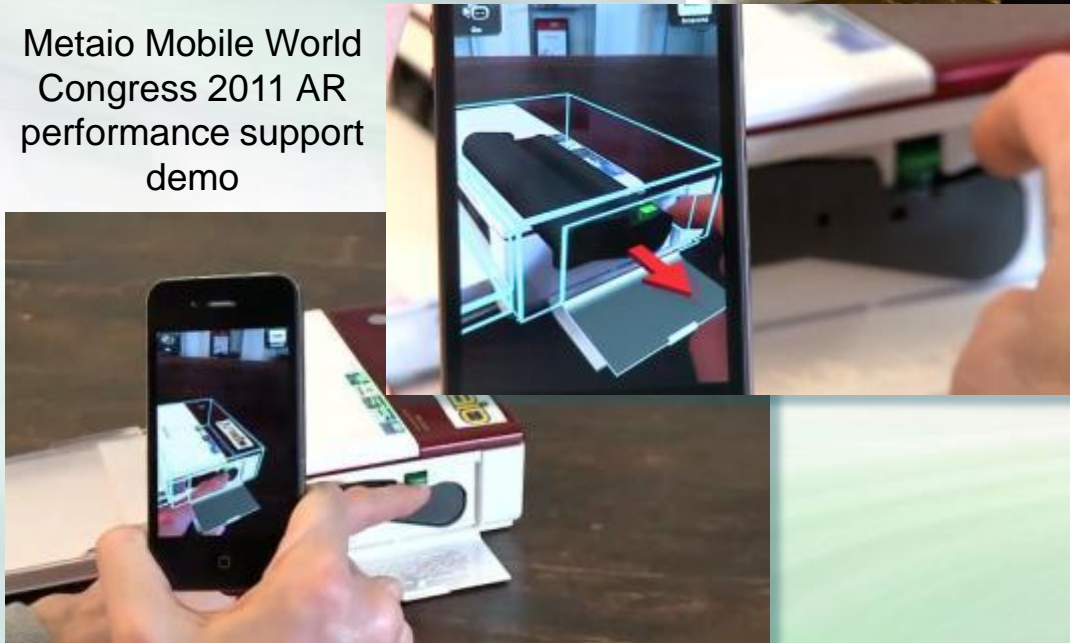


Location-based Learning or Mobile Augmented Reality Learning?

Ogmento – Put and Spell



Metaio Mobile World Congress 2011 AR performance support demo



Ogmento – Sketch AR

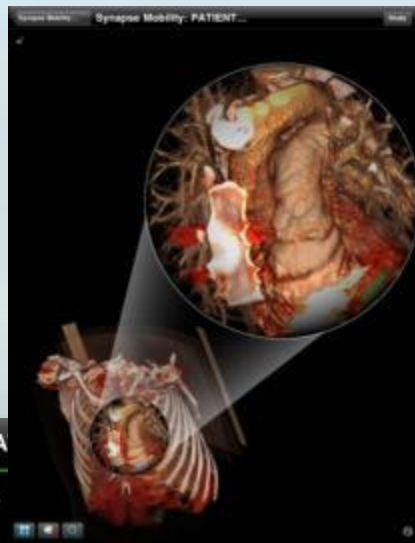
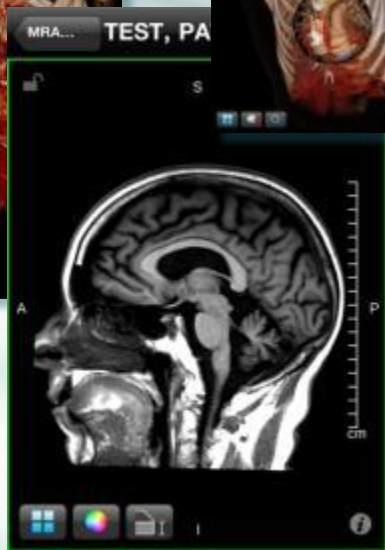


Simulation-based Learning Leading Indicators: Five-Year Horizon

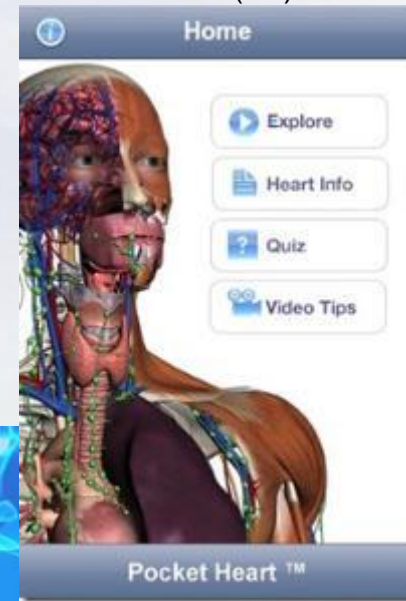
- There are several commercial dedicated tools and platforms for building Simulation-based Learning content
 - Yet, Adobe Flash and mainstream 3D platforms are common tools used to create Simulation-based Learning
- Microsoft (Avatar Kinect) and Sony promoting consoles as Simulation-based Learning platforms
- Nintendo Wii increasingly being used in US phys-ed classes
- Rapid adoption of “point-of-care” Simulation-based Learning in the healthcare segment



Sophisticated "Point-of-Care" Simulation-based Learning Now Being Used in the Healthcare Segment



Pocket Anatomy Pocket Heart (3D)



Fugifilm
Synapse Mobility



ORCA MD Shoulder Decide

