

# **Immersive Reality for Defense Market - A Global and Regional Analysis: Focus on Type, Component, Devices, Application, and Region - Analysis and Forecast, 2023-2033**

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## **Abstracts**

### Introduction to Immersive Reality for Defense Applications

The field of immersive reality for defense applications is rapidly emerging as a pivotal domain within the defense and military industry, driven by the increasing need for advanced technological solutions to enhance training, simulation, and operational effectiveness. Immersive reality refers to a spectrum of technologies that envelop users/trainees in synthetic environments, providing a multisensory experience that can replicate real-world scenarios with unprecedented fidelity and immersion.

Within this field, various segments are taking center stage, each contributing to the transformation of defense capabilities through the innovative use of immersive reality technologies. Training and simulation represent a critical sector where immersive reality plays a pivotal role in creating realistic training environments for soldiers, pilots, and other defense personnel. These immersive simulations enable personnel to practice and refine their skills in complex and high-stress situations, ultimately enhancing readiness and performance in real-world scenarios.

Immersive reality is also making significant strides in mission planning and analysis, where it allows military strategists to visualize and simulate various tactical scenarios, enabling better decision-making and strategic planning. This segment encompasses technologies such as virtual reality (VR) and augmented reality (AR) that provide valuable situational awareness and data visualization tools.

Additionally, the integration of immersive reality is revolutionizing the way military equipment and vehicles are designed and tested. Through VR and AR, engineers and designers can create and assess prototypes in virtual environments, saving time and resources while optimizing performance and functionality.

The realm of defense operations and situational awareness benefits from immersive reality solutions by providing soldiers and commanders with enhanced data visualization, navigation aids, and real-time information overlays. These technologies improve communication, coordination, and decision-making in the field.

The immersive reality for defense applications field stands as a driving force behind the transformation of military technologies, offering a wide array of technologies and applications that challenge traditional defense paradigms. As defense agencies and armed forces continue to face evolving threats and operational challenges, the integration of immersive reality is poised to redefine the limits of what can be achieved in training, simulation, mission planning, and the execution of critical defense operations.

## Market Introduction

Immersive reality technologies are rapidly reshaping the landscape of defense applications, offering a host of benefits such as enhanced training, simulation, and operational efficiency. These cutting-edge solutions provide cost-effectiveness, realism, and multifaceted functionalities, making them indispensable in modern defense operations. One of the primary applications of immersive reality in the defense sector is advanced training and simulation. Virtual reality (VR) and augmented reality (AR) systems enable soldiers to engage in realistic combat scenarios, hone their skills, and develop tactical expertise in a safe and controlled environment. This not only reduces training costs but also enhances the effectiveness of military personnel.

In addition to training, immersive reality is also instrumental in mission planning and execution. Heads-up displays (HUDs) and augmented reality systems are used to provide real-time information to soldiers, pilots, and commanders, improving situational awareness and decision-making on the battlefield. Furthermore, immersive reality plays a pivotal role in remote operations and drone piloting. Operators can immerse themselves in the battlefield through VR headsets, controlling unmanned vehicles and drones with precision and accuracy.

The present state of the immersive reality for the defense market is marked by

substantial growth driven by multiple factors. Foremost among them is the pressing need to enhance soldier readiness and preparedness for complex and diverse threats. Immersive reality solutions offer highly realistic and adaptable training scenarios that replicate real-world conditions, enabling soldiers to hone their skills in a safe and controlled environment. Additionally, the integration of immersive technologies into defense operations optimizes mission planning, enhances communication, and supports real-time decision-making on the battlefield.

The expanding landscape of asymmetric warfare, urban combat scenarios, and the growing use of unmanned systems have further underscored the significance of immersive reality technologies in defense applications. The ability to visualize, analyze, and respond to dynamic situations in real-time through immersive interfaces is becoming a critical asset for military personnel and commanders alike.

#### Market Segmentation:

##### Segmentation 1: by Application

3D Modeling

Simulation and Training

Maintenance and Monitoring

Situational Awareness

#### Simulation and Training Segment to Dominate the Global Immersive Reality for Defense Market (by Application)

The global immersive reality for defense market (by application) is expected to generate huge revenues from the simulation and training segment, followed by the situational awareness segment. The simulation and training segment reported a revenue generation of \$994.7 million in 2022 and is expected to grow at a CAGR of 18.79% during the forecast period 2023-2033.

##### Segmentation 2: by Region

North America

Europe

Asia-Pacific

Rest-of-the-World

North America accounted for the highest market share in 2022 in the global immersive reality for defense market and registered a CAGR of 18.47%, owing to a significant number of companies based in the region. North America's growth is driven by various activities in the U.S. defense industry. In North America, the U.S. has the largest share of growth in the immersive reality for defense market and is anticipated to grow at a CAGR of 18.33%

### Segmentation 3: by Type

Augmented Reality (AR)

Virtual Reality (VR)

Mixed Reality (MR)

### Augmented Reality Segment to Lead the Global Immersive Reality for Defense Market (by Type)

The global immersive reality for defense market (by type) is expected to generate huge revenues from the augmented reality (AR) segment, followed by the virtual reality (VR) segment. The AR segment reported a revenue generation of \$1,047.0 million in 2022 and is expected to grow at a CAGR of 18.75% during the forecast period 2023-2033.

### Segmentation 4: by Component

Sensors

Camera

Processor

Modules

Memory

Display

Others

### Camera Segment to Lead the Global Immersive Reality for Defense Market (by Component)

The global immersive reality for defense market (by component) is expected to be led by the camera segment. The camera segment reported a revenue generation of \$333.0 million in 2022 and is expected to grow at a CAGR of 18.83% during the forecast period 2023-2033.

### Segmentation 5: by Device

Hardware

Software

### Hardware Segment to Lead the Global Immersive Reality for Defense Market (by Device)

The global immersive reality for defense market (by device) is expected to be led by the hardware segment. The hardware segment reported a revenue generation of \$1,329.2 million in 2022 and is expected to grow at a CAGR of 18.76% during the forecast period 2023-2033.

### Recent Developments in the Global Immersive Reality for Defense Market

In August 2023, HTX Labs and Vinci VR announced a strategic partnership to develop and deliver immersive training solutions using the EMPACT platform. The EMPACT platform is a comprehensive solution for secure, centralized content management, self-authoring courseware creation, and deployment of

this content and courseware across a spectrum of hardware and devices.

In June 2023, Red Six Aerospace, Inc. announced a partnership with the U.K.'s Royal Air Force (RAF) and the National Security Strategic Investment Fund (NSSIF) for augmentation of the U.K. military's flying training system, known as UKMFTS, through the integration of Advanced Tactical Augmented Reality System (ATARS).

In May 2023, HTX Labs won a small business innovation research (SBIR) Phase III contract with the U.S. Air Force to facilitate the Tech Training Transformation Cloud (T3Cloud) solution, a significant advancement that would amplify the utilization and influence of immersive learning throughout the Air Force Academy.

In April 2023, Applied Virtual Simulation (AVS) won a \$11.8 million contract from the Australian Defence Force (ADF) for provisioning a suite of common simulation software (CSS) solutions to support the ADF's Land Simulation Core 2.0 Tranche 1 program.

In March 2023, Leonardo and Varjo announced a partnership to collaboratively develop the capabilities of Leonardo's aircraft training solutions using Varjo's MR systems. This development would utilize Varjo's XR-3 headset to enhance the pilot training experience across multiple operations.

## Demand – Drivers, Challenges, and Opportunities

### Market Demand Drivers: Increasing Need for Training with Enhanced Situational and Spatial Awareness toward Increased Soldier Lethality

The increasing demand for training solutions that augment situational and spatial awareness within the immersive reality (IR) for defense market is rooted in the imperative to enhance soldier lethality by means of comprehensive and advanced preparatory measures. This pivotal business driver factor underscores the critical role of immersive reality technologies in fundamentally redefining traditional defense training paradigms. Conventional training methodologies often falter in replicating the intricacies of complex operational environments and fail to impart soldiers with real-time, high-fidelity situational awareness. Immersive reality solutions decisively address this challenge by seamlessly fusing physical and digital realms, thereby empowering

soldiers to engage in hyper-realistic training scenarios that closely emulate genuine combat conditions. Through the seamless integration of spatially accurate visualizations, auditory cues, and tangible haptic feedback, trainees can holistically internalize the terrain, threats, and tactical prospects, resulting in vastly improved decision-making capabilities and significantly expedited response times.

### Market Challenges: Tackling Cybersickness and Information Overload

Cybersickness, a phenomenon akin to motion sickness induced by perceptual incongruence in immersive environments, poses a challenge to the widespread adoption of immersive reality solutions. The nature of these environments, designed to replicate real-world situations, can lead to sensory conflicts between visual and vestibular inputs, potentially resulting in discomfort, disorientation, and reduced operational effectiveness for defense personnel. Mitigating cybersickness requires a comprehensive approach encompassing hardware refinement, software optimization, and user adaptation strategies. Simultaneously, the surge of information overload in immersive reality scenarios presents another formidable challenge. The integration of diverse data streams, such as real-time sensor data, communication feeds, and augmented information overlays, can overwhelm users, impeding their ability to process, comprehend, and act upon critical information.

### Market Opportunities: Development of Glass Box Systems

The XR-enabled see-through glass box systems for tanks are a cutting-edge advancement poised to revolutionize armored vehicle operations. XR integration into tanks through see-through glass box systems holds tremendous potential for enhancing agile operations by enabling the occupants to have a 360-degree scope of situational awareness. This innovation involves incorporating display panels onto the interior of tanks, which are seamlessly integrated with high-resolution cameras placed on the tank's exterior. These cameras capture the external environment in real time, and the processed video feed is projected onto the interior display panels. This allows tank crews to see through the tank's metal shell and effectively eliminate blind spots.

How can this report add value to an organization?

**Product/Innovation Strategy:** The product segment helps the reader to understand the different types of immersive solutions available for defense deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the immersive reality for defense market by technology, inclusive of

the key developments in the respective segments globally.

**Growth/Marketing Strategy:** The immersive reality for defense market has seen some major development by key players operating in the market, such as partnership, collaboration, and joint venture. The favored strategy for the collaboration between defense agencies and private players is primordially contracting the development and delivery of advanced materials and specialized composite components for space system applications. For instance, in April 2021, Microsoft Corporation won a fixed price purchase agreement valued at \$21.88 billion from the U.S. Army for supplying 120,000 customized HoloLens MR headsets over a period of 10 years for the Integrated Visual Augmentation System (IVAS) program, planned to enhance the training and situational awareness capabilities of the U.S. Army's Close Combat Force (CCF). The IVAS integrates a variety of technologies within a single framework, enabling soldiers to engage in combat, rehearsals, and training seamlessly. This collection of functionalities harnesses existing high-resolution night vision, thermal imaging, and soldier-borne sensors, all unified into a cohesive heads-up display (HUD). The outcome is an enhanced level of situational awareness, the ability for precise target engagement, and more informed decision-making.

**Competitive Strategy:** Key players in the immersive reality for defense market have been analyzed and profiled in the study, inclusive of major segmentations and service offerings companies provide in the technology segments, respectively. Moreover, a detailed competitive benchmarking of the players operating in the immersive reality for defense market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the revenue pockets in the market.

**Methodology:** The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Primary Research



The primary sources involve industry experts from the immersive reality for defense industry, including headset manufacturers, simulator manufacturers, immersive simulation solutions developers, and extended reality (XR) startups. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

## Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as The Defense Post, Virtual Reality Society, TechViz, VR/AR Association, Modern Battlespace, and XR Today, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as [www.augenix.org](http://www.augenix.org) and [www.defense.gov](http://www.defense.gov).

Secondary research was done to obtain critical information about the industry's value chain, the market's monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

## Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights that are gathered from primary experts.

In the global immersive reality for defense market, established players account for 55% of the market, and small-scale players and startups account for 45% of the market. The primordial established commercial players and legacy companies are BAE Systems, CAE, Inc., Indra Sistemas, S.A., Thales Group, and Lockheed Martin, among others. The primordial startups and small-scale players include SimX, HTX Labs, VRgineers, Inc., AjnaLens, Red Six Aerospace Inc., and among others.

## Key Companies Profiled:

Bohemia Interactive Simulations

CAE, Inc.

HTX Labs

Indra Sistemas, S.A.

Lockheed Martin

Red Six Aerospace, Inc.

SimX

Thales Group

VRgineers, Inc.

Varjo

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