

Global Location-based Services (LBS) and Real-Time Location Systems (RTLS) Market Size Study & Forecast, by Technology, Application, Type of RTLS System and Regional Forecasts 2025-2035

<https://marketpublishers.com/r/GDE8AA7BBA19EN.html>

Date: June 2025

Pages: 285

Price: US\$ 3,218.00 (Single User License)

ID: GDE8AA7BBA19EN

Abstracts

The Global Location-based Services (LBS) and Real-Time Location Systems (RTLS) Market is valued at approximately USD 30.79 billion in 2024 and is expected to accelerate at a stellar CAGR of 27.81% during the forecast period 2025 to 2035. As businesses increasingly pivot towards contextualized customer engagement and asset traceability, the convergence of location intelligence and real-time analytics is powering a new era of spatially aware technologies. Location-based Services and RTLS have emerged as indispensable tools for enterprises striving to gain operational visibility, optimize workflows, and deliver hyper-personalized user experiences. From geofencing and dynamic routing in logistics to in-store marketing in retail environments, the fusion of GPS and RFID technologies has redefined real-time decision-making.

Surging smartphone penetration, the expansion of IoT ecosystems, and escalating demands for location-sensitive applications are acting as core enablers of this market. With businesses chasing granular insights on consumer behavior and asset utilization, technologies like GPS, Wi-Fi triangulation, Bluetooth Low Energy (BLE), and RFID have become integral to modern digital infrastructure. Navigation and mapping services are gaining widespread adoption, not only from a consumer convenience standpoint but also for enterprise-grade tracking of people, assets, and vehicles. Meanwhile, the growing deployment of asset and personnel tracking systems in healthcare, manufacturing, and defense sectors is bolstering RTLS uptake. However, rising concerns around data privacy, location spoofing, and infrastructural limitations in underdeveloped areas remain potential impediments to widespread adoption.

Geographically, North America is leading the global LBS and RTLS market, primarily due to its mature digital economy, robust mobile ecosystem, and rapid deployment of smart infrastructure. The region benefits from aggressive innovation by tech giants and the widespread implementation of RTLS in logistics, healthcare, and public safety. Europe follows closely, propelled by strict regulatory norms such as GDPR that foster secure and responsible location data usage. Additionally, Asia Pacific is poised to register the fastest growth rate through 2035, driven by rapid urbanization, booming retail and e-commerce sectors, and the rollout of smart city initiatives across China, India, and Southeast Asia. Government mandates encouraging digital infrastructure development are also contributing to increased demand in the region.

Major market player included in this report are:

Google LLC

Apple Inc.

Cisco Systems, Inc.

Qualcomm Technologies, Inc.

IBM Corporation

Microsoft Corporation

Zebra Technologies Corporation

Oracle Corporation

HERE Technologies

STANLEY Healthcare

Ericsson

TomTom International BV

Esri

HID Global

Ubisense

Global Location-based Services (LBS) and Real-Time Location Systems (RTLS) Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Technology:

GPS (Global Positioning System)

RFID (Radio Frequency Identification)

By Application:

Navigation and Mapping

Location-Based Advertising and Marketing

By Type of RTLS System:

Asset Tracking RTLS

Personnel Tracking RTLS

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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