

Over-the-Air (OTA) Testing Market Report by Technology (Cellular, Bluetooth, Wi-Fi), Application (Mobile Payment System, Home Automation, Utilities Management System, Traffic Control System, and Others), Industry Vertical (Aerospace and Defense, Consumer Electronics, Automotive, Logistics and Transportation, Healthcare), and Region 2024-2032

<https://marketpublishers.com/r/O1774AD31BC3EN.html>

Date: March 2024

Pages: 142

Price: US\$ 3,899.00 (Single User License)

ID: O1774AD31BC3EN

Abstracts

The global over-the-air (OTA) testing market size reached US\$ 2.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 4.7 Billion by 2032, exhibiting a growth rate (CAGR) of 7.3% during 2024-2032. The rising complexities in wireless networks, expansion of the Internet of Things (IoT) ecosystem, and increasing utilization of smartphones, tablets, wearables, computers, and smart home appliances are some of the major factors propelling the market.

Over-the-air (OTA) testing is a method related to wireless technology evaluation. It comprises the assessment of wireless devices, such as smartphones, the Internet of Things (IoT) devices, and connected vehicles for their performance, functionality, and compliance with standards, all conducted remotely and wirelessly. It evaluates several aspects, such as signal strength, data throughput, antenna efficiency, and electromagnetic compatibility, to ensure optimal wireless connectivity and user experience. It simulates real-world usage scenarios and enables a comprehensive assessment of the capabilities of devices across various conditions.

At present, the rising focus on enhanced user experience and avoiding potential security vulnerabilities is supporting the growth of the market. Besides this, the increasing emergence of fifth generation (5G) technology, along with the rising demand

for high-speed internet services, is strengthening the growth of the market. In line with this, the growing demand for OTA testing in connected vehicles and autonomous driving technology in assessing the communication capabilities of these vehicles and ensuring safe and reliable connectivity for features, such as infotainment, navigation, and vehicle-to-vehicle communication, is positively influencing the market. Apart from this, the increasing adoption of OTA testing to enable remote monitoring and management of devices and minimize the need for physical access for updates and diagnostics is offering lucrative growth opportunities to industry investors.

Over-the-Air (OTA) Testing Market Trends/Drivers:

Rising utilization of wireless devices

The rising demand for numerous wireless devices, such as smartphones, laptops, personal computers (PCs), wearables, tablets, and smart home appliances, is contributing to the growth of the market. In addition, consumers are increasingly relying on these devices for communication and various tasks. People are preferring enhanced connectivity and optimal performance to achieve improved productivity. Furthermore, the emergence of fifth generation (5G) technology provides increased speed and connectivity. However, it also presents complex challenges due to higher frequencies and diverse network architectures. OTA testing addresses these challenges by evaluating the ability of devices to function seamlessly within the new 5G landscape. Manufacturers and service providers are ensuring that their devices not only support 5G but also deliver enhanced benefits to consumers.

Increasing complexities in wireless networks

The complex nature of modern wireless networks comprises multiple frequency bands, advanced modulation schemes, and complicated antenna designs, that require rigorous testing. In addition, OTA testing becomes necessary in assessing the ability of a device to navigate complexities effectively. Moreover, stringent industry standards are implemented by several organizations to mandate specific performance benchmarks for wireless devices. Apart from this, OTA testing ensures that these devices meet the standards and enhances compatibility across the wireless ecosystem. Furthermore, manufacturers and developers rely on this testing method to guarantee the adherence of devices to industry norms and to prevent any potential issues, which is supporting the growth of the market.

Expansion of the Internet of Things (IoT) ecosystem

The increasing utilization of a diverse range of devices from wearables and home automation systems to industrial sensors due to the expansion of the Internet of Things (IoT), is contributing to the growth of the market. In line with this, these devices communicate wirelessly and often interact with each other with seamless connectivity and reliable performance. OTA testing addresses the unique challenges posed by the IoT, such as the need for devices to function in various environments and maintain energy efficiency. Apart from this, the reliability ensured by OTA testing is crucial in maintaining the growth of the IoT market. Manufacturers and IoT developers prioritize delivering products that function reliably and consistently across different use cases and scenarios.

Over-the-Air (OTA) Testing Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global over-the-air (OTA) testing market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on technology, application and industry vertical.

Breakup by Technology:

- Cellular
- Bluetooth
- Wi-Fi

Cellular represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the technology. This includes cellular, Bluetooth, and Wi-Fi. According to the report, cellular represented the largest segment. Cellular technology comprises evaluating the performance of wireless devices, such as smartphones and tablets, across different generations of cellular networks like third generation (3G), fourth generation (4G) LTE, and fifth generation (5G). This testing focuses on critical parameters, such as signal strength, data transfer speeds, and network handover efficiency. Moreover, it ensures that devices maintain consistent connectivity and data transmission quality under varying network conditions. Manufacturers and service providers rely on cellular OTA testing to validate the ability of the devices to deliver seamless connectivity and enhance user experiences across diverse network environments.

Breakup by Application:

Mobile Payment System
Home Automation
Utilities Management System
Traffic Control System
Others

Mobile payment system accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes mobile payment system, home automation, utilities management system, traffic control system, and others. According to the report, mobile payment system represented the largest segment. Mobile payment systems involve assessing the performance and security of mobile devices used for contactless payments and digital wallets. It evaluates the ability of the device to securely transmit payment data over wireless networks and ensure encryption protocols. This testing validates seamless communication between mobile devices and point-of-sale (POS) terminals and verifies that transactions occur accurately. OTA testing assists in enhancing user trust and safeguarding sensitive financial information. It also aids in maintaining the integrity of mobile payment systems and assuring both businesses and consumers that their transactions are secure, reliable, and resistant to potential threats.

Breakup by Industry Vertical:

Aerospace and Defense
Consumer Electronics
Automotive
Logistics and Transportation
Healthcare

The report has provided a detailed breakup and analysis of the market based on the application. This includes aerospace and defense, consumer electronics, automotive, logistics and transportation, and healthcare.

In the aerospace and defense industry, OTA testing plays a vital role in ensuring the reliability and resilience of communication systems within aircraft and defense equipment. This involves evaluating the performance of devices in challenging electromagnetic environments and extreme conditions. OTA testing verifies that communication systems maintain connectivity, data integrity, and security, which are crucial for mission-critical operations. In addition, the rising demand for OTA testing in

the aerospace and defense industry for maintaining operational efficiency and safety is propelling the growth of the market.

In the consumer electronics sector, OTA testing is integral for assessing the connectivity and performance of devices like smartphones, tablets, wearables, and smart home appliances. This testing ensures that devices meet user expectations by providing consistent wireless connectivity, optimal data speeds, and reliable functionality across diverse usage scenarios. Apart from this, it validates that devices seamlessly connect to Wi-Fi, cellular networks, and other wireless technologies to enhance user experiences and satisfaction.

Automotive OTA testing evaluates communication systems within vehicles and ensures functionalities, such as infotainment, vehicle-to-vehicle (V2V) communication, and telematics. In addition, it guarantees that wireless systems function reliably and securely to enhance safety, navigation, and user experience. Moreover, the rising adoption of OTA testing in autonomous vehicles is strengthening the growth of the market.

Breakup by Region:

- North America
 - United States
 - Canada
- Asia-Pacific
 - China
 - Japan
 - India
 - South Korea
 - Australia
 - Indonesia
 - Others
- Europe
 - Germany
 - France
 - United Kingdom
 - Italy
 - Spain
 - Russia
 - Others
- Latin America

Brazil
Mexico
Others
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest over-the-air (OTA) testing market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest market share due to continuous advancements in wireless communication. In addition, the rising adoption of various electronic devices among individuals is strengthening the growth of the market in the region. Besides this, the increasing demand for OTA testing to ensure the seamless integration of devices within the new network landscape is offering a positive market outlook. In line with this, the rising adoption of automotive technologies is supporting the growth of the market in the North America region.

Competitive Landscape:

Major players in the industry are investing in various testing methodologies and equipment to evaluate devices under diverse real-world conditions. This includes testing devices in different environments, signal strengths, and interference scenarios to replicate user experiences accurately. In addition, they are focusing on testing devices for their compatibility and performance within these advanced networks. They are also ensuring that devices can harness the full potential of 5G technology. Apart from this, key players are tailoring their services to meet the specific needs of different industries, such as automotive, aerospace, consumer electronics, and healthcare, by providing industry-specific testing protocols and scenarios to ensure accurate evaluation.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Anritsu Corporation

BluFlux LLC
Bureau Veritas
CETECOM GmbH (RWT?V e.V.)
Element Materials Technology
Eurofins Scientific SE
Intertek Group plc
Keysight Technologies
Microwave Vision Group (MVG)
Rohde & Schwarz GmbH & Co KG
SGS S.A.
UL Solutions

Recent Developments:

In June 2022, Anritsu Company partnered with AeroGT Labs to provide best-in-class 5G multiple-in multiple-out (MIMO) over-the-air (OTA) test platforms to characterize, test, and optimize antennas. The platforms perform single- or multiple-use antenna performance and reliability tests on products, such as vehicles, mobile devices, and similar designs, in a simulated environment before commercialization.

In 2020, Verkotan Selects PWC Technology from Rohde & Schwarz for 5G NR OTA Base Station Testing. Rohde & Schwarz has expanded its 5G NR testing portfolio with the R&S PWC200, developed for 5G massive MIMO base station testing for both production and research and development (R&D).

In 2020, MVG launched STARWAVE, shaping the future of 5G mmWave OTA testing to create accurate direct far-field conditions in a compact system.

Key Questions Answered in This Report

1. What was the size of the global Over-the-Air (OTA) testing market in 2023?
2. What is the expected growth rate of the global Over-the-Air (OTA) testing market during 2024-2032?
3. What are the key factors driving the global Over-the-Air (OTA) testing market?
4. What has been the impact of COVID-19 on the global Over-the-Air (OTA) testing market?
5. What is the breakup of the global Over-the-Air (OTA) testing market based on the technology?
6. What is the breakup of the global Over-the-Air (OTA) testing market based on the application?
7. What are the key regions in the global Over-the-Air (OTA) testing market?
8. Who are the key players/companies in the global Over-the-Air (OTA) testing market?

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