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Connected Worker Market by Wearable, Handheld, Industrial IoT Sensor & Edge Device, Communication & Connectivity, and Robotics & Automation Device, Technology (AR & VR, AI & ML, IIoT, Edge Computing), Application and Vertical - Global forecast to 2030

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Abstracts

The global connected worker market is expected to grow from USD 8.62 billion in 2025 to USD 20.18 billion by 2030, at a CAGR of 18.5% during the forecast period. The expansion of remote and hybrid work models has transformed how field and frontline workers collaborate and manage their tasks. These models blend in-office, remote, and on-the-go work, allowing employees to be productive from various locations rather than confined to a single physical workspace. This shift necessitates the use of advanced collaborative digital tools that enable seamless communication across distributed teams, ensuring that workers remain connected regardless of where they are working. For frontline and field workers, such tools facilitate real-time information sharing, remote troubleshooting, and task coordination that would otherwise rely on face-to-face interactions. Hybrid work also requires flexible task management systems that adapt to different schedules and environments, supporting solitary remote work and coordinated team efforts at the workplace. These technologies help maintain productivity, enhance worker engagement, and ensure operational continuity by bridging communication gaps, providing remote expert support, and enabling dynamic scheduling and reporting. As a result, connected worker platforms have become critical in supporting hybrid workforce strategies, empowering frontline employees to work efficiently while maintaining strong collaboration and safety standards.

“Industrial Internet of Things (IIoT) segment accounted for the largest market share in

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2024"

In 2024, the Industrial Internet of Things (IIoT) held the largest share of the connected worker market due to its pivotal role in enhancing operational efficiency, safety, and productivity across industries. IIoT-enabled solutions integrate wearable devices, sensors, rugged mobile equipment, and head-mounted displays to provide real-time data and connectivity for workers in the field. IIoT applications are particularly significant in manufacturing, enabling predictive maintenance and minimizing downtime. In construction, it improves safety compliance and workflow efficiency, while in energy and utilities, it supports equipment monitoring and sustainable practices. With industries increasingly embracing digital transformation, IIoT-driven connected worker solutions are expected to continue shaping the market, fostering innovation, and enhancing workforce productivity and safety.

"Software offering segment is projected to register the highest CAGR from 2025 to 2030"

The software segment within the connected worker market is projected to experience the highest CAGR during the forecast period. Software solutions are pivotal in enabling real-time monitoring, analytics, and integration with wearable devices and IoT sensors, which are essential for enhancing workforce safety, productivity, and operational efficiency. Advancements in technologies such as artificial intelligence (AI), machine learning, and big data analytics further enhance the capabilities of connected worker software, providing actionable insights into worker performance and safety. This trend is particularly evident in industries such as manufacturing, construction, and energy, where the demand for digital transformation and smart workforce solutions is accelerating. As organizations increasingly adopt cloud-based platforms for scalability and cost-effectiveness, the software segment is poised for significant growth, contributing substantially to the overall expansion of the connected worker market.

"China is likely to dominate the Asia Pacific connected worker market during the forecast period"

China is expected to dominate the Asia Pacific connected worker market from 2025 to 2030 due to its rapid industrial automation, strong government initiatives, including "Made in China 2025," and heavy investment in industrial IoT and digital infrastructure. The large manufacturing base, rising labor costs, and skills gap drive the adoption of connected worker solutions to improve productivity, efficiency, and safety. Additionally, advancements by local technology providers and a focus on regulatory compliance further accelerate the deployment of wearable devices, software platforms, and real-time monitoring systems, positioning them as the primary driver in the region.

Breakdown of Primaries

Various executives from key organizations operating in the connected worker market were interviewed in-depth, including CEOs, marketing directors, and innovation and technology directors.

By Company Type: Tier 1–45%, Tier 2–30%, and Tier 3–25%

By Designation: C-level Executives–25%, Directors–35%, and Others–40%

By Region: North America–35%, Europe–30%, Asia Pacific–25%, and RoW–10%

The connected worker market is dominated by globally established players, such as Zebra Technologies Corp. (US), Honeywell International Inc (US), Microsoft (US), Hexagon AB (Sweden), PTC (US), SymphonyAI (US), Innovapptive (US), ProGlove (Germany), Siemens (Germany), RealWear (US), Redzone (US), Schneider Electric (France), Tulip Interfaces, Inc. (US), POKA Inc. (Canada), Librestream Technologies (Canada), Taqtile, Inc. (US), Plutomen (India), Aatmunn (US), Augmentir, Inc. (US), VSight UAB (Lithuania), Vuzix Corporation (US), ThirdEye Gen, Inc. (US), Kopin (US), Atheer, Inc. (US), and Treedis (Israel). The study includes an in-depth competitive analysis of these key players in the connected worker market, with their company profiles, recent developments, and key market strategies.

Study Coverage

The report segments the connected worker market and forecasts its size by offering, technology, connectivity, application, vertical, and region. The report also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. It gives a detailed view of the market across four main regions—North America, Europe, Asia Pacific, and RoW. The report includes a value chain analysis of the key players and their competitive analysis of the connected worker ecosystem.

Key Benefits of Buying the Report

Analysis of key drivers (Integration of IoT, AI, AR/VR, and 5G), restraints (High initial costs, complexity in integrating connected worker solutions with legacy systems), opportunities (Collaborative robotics and exoskeleton integration), and challenges (Lack of user adoption and workforce resistance) influencing the growth of the connected worker market

Products/Solution/Service Development/Innovation: Detailed insights into upcoming technologies, research, and development activities in the connected worker market

Market Development: Comprehensive information about lucrative markets–the report analyses the connected worker market across varied regions.

Market Diversification: Exhaustive information about new hardware, software, services, untapped geographies, recent developments, and investments in the connected worker market

Competitive Assessment: In-depth assessment of market shares and growth strategies and offerings of leading players, such as Honeywell International Inc (US), Microsoft (US), Siemens (Germany), Schneider Electric (France), PTC (US), among others.

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