

Indoor Location Market by Component (Hardware, Solutions, and Services), Technology (BLE, UWB, Wi-Fi, RFID), Application (Emergency Response Management, Remote Monitoring, Predictive Asset Maintenance), Vertical and Region - Global Forecast to 2028

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Abstracts

The Indoor location market is estimated at USD 10.9 billion in 2023 and is projected to reach USD 29.8 billion by 2028, at a CAGR of 22.3% from 2023 to 2028. Various key players in the ecosystem have led to a competitive and diverse market. Government initiatives to establish smart cities are expected to drive the adoption of the Indoor location market in the future.

By solutions, the indoor tracking segment to hold the largest market size during the forecast period.

Indoor tracking solutions are designed to accurately track and monitor the movement of objects or individuals within indoor environments. These solutions utilize various technologies like Wi-Fi, Bluetooth, RFID, ultrasonic waves, or infrared signals to establish location information. Indoor tracking is one of the most helpful features of a smart environment or smart building and requires technologies that can work together with an IoT platform. IndoorAtlas Asset Tracker allows the tracking of any devices that can scan their surrounding Wi-Fi and/or BLE beacon environment. Spreo has offered an employee engagement app with indoor tracking and mapping intelligence for the headquarters of a known multinational IT corporation to help employees reserve and find over 1,000 meeting rooms across the entire campus.

Based on vertical, the transportation and logistics segment are expected to register the fastest growth rate during the forecast period.

The transportation & logistics vertical consists of areas that include airports, railway stations, bus stations, and subways that are in need of indoor location solutions for better route optimization and increased customer experience. Indoor location technology in automobiles allows companies to increase capital returns and drive customer loyalty. They also help understand customer behavior and offer valuable information that could assist in building enhanced advertising campaigns, optimizing services, and selecting the right locations. The adoption of indoor location solutions allows the transportation vertical to manage inventory effectively, save costs on audits, and track missing equipment.

'Asia Pacific to register the highest growth rate during the forecast period.'

Asia Pacific comprises nations with rapid technological development, such as China, Japan, and India. Asia Pacific is home to several developing countries that are experiencing rapid urbanization. Several factors contributing to growth of indoor location in this region, include the region's large population, rapid urbanization, increasing adoption of smartphones, and the demand for enhanced indoor navigation and location-based services. This offers enormous business opportunities for Indoor location vendors, even while presenting grave challenges for sustainable development. The widespread use of smartphones in Asia Pacific has created opportunities for indoor location-based mobile applications and services. Companies are developing mobile apps that leverage indoor positioning to offer services like indoor navigation, proximity-based promotions, and location-based recommendations.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 35%, Tier 2 – 40%, and Tier 3 – 25%

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

By Region: North America – 30%, Europe – 35%, Asia Pacific – 25%, Middle East & Africa– 5%, and Latin America– 5%.

The major players in the Indoor location market are Zebra Technologies Corporation (US), Cisco (US), Google (US), Microsoft (US), HPE (US), Apple (US), Esri (US), Acuity Brands(US), Inpixon(US), HERE Technologies (US), HID Global (US), CenTrak (US), Sonitor (Norway), Ubisense (UK), infsoft (Germany), Polaris Wireless (US), Quuppa (Finland), Securitas Healthcare (US), Navigine (US), Blueiot (China), Kontakt.io (US), AiRISTA (US), InnerSpace (Canada), Syook (India), Oriient (Israel), Navenio (England), Situm (Spain), Pozyx (Belgium), Azitek (Portugal), and Mapxus (China). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, and product enhancements, and acquisitions to expand their footprint in the Indoor location market.

Research Coverage

The market study covers the Indoor location market size across different segments. It aims at estimating the market size and the growth potential across different segments, including offerings (hardware, solutions, and services), application, technology, vertical and region. The study includes an in-depth competitive analysis of the leading market players, their company profiles, key observations related to product and business offerings, recent developments, and market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the global Indoor location market and its subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. Moreover, the report will provide insights for stakeholders to understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Proliferation of smartphones, connected devices, and location-based applications among customers, Increased number of applications powered by beacons and BLE tags, and Growing integration of beacons in cameras), restraints (Concerns related to data security and privacy obstruct the adoption of indoor location, Stringent government rules and regulations), opportunities (Increasing demand for RFID tags across the retail industry, Growing demand for indoor location technologies to support lean automation and robotic processes, and Focus on Industry 4.0 smart cities

and smart manufacturing), and challenges (Lack of skills and awareness about indoor location technologies) influencing the growth of the Indoor location market. Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Indoor location market. Market Development: Comprehensive information about lucrative markets – the report analyses the Indoor location market across various regions. Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Indoor location market. Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Zebra Technologies Corporation (US), Cisco (US), Google (US), Microsoft (US), HPE (US), Apple (US), Esri (US), Acuity Brands(US), Inpixon(US), HERE Technologies (US), HID Global (US), CenTrak (US), Sonitor (Norway), Ubisense (UK), infsoft (Germany), Polaris Wireless (US), Quuppa (Finland), Securitas Healthcare (US), Navigine (US), Blueiot (China), Kontakt.io (US), AiRISTA (US), InnerSpace (Canada), Syook (India), Oriient (Israel), Navenio (England), Situm (Spain), Pozyx (Belgium), Azitek (Portugal), and Mapxus (China).

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*Details on Business overview, Products/Solutions/Services offered, Recent developments, MNM view, Right to win, Strategic choices, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

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About

In this report, indoor location has been defined as a solution based on various indoor location technologies which are used to locate, track, and navigate objects and people inside a building premise. The report is intended to provide market information, market size forecasts, and analyst insights on the global indoor location market, where base year used for forecasting the market size is 2013. The report provides an indepth analysis and forecasting of the market from 2014 to 2019 in U.S. dollars (USD) .The report covers indoor location solutions such as tag-based, RF-based, and sensor-based; applications, services, and verticals.

To reach a global perspective, the market has also been divided across different geographic regions

The report does not cover automation and robotics application related to the indoor location Market

Advancements in technology in the past few decades have inevitably led to the potential growth of indoor location across the global market and R&D labs. In the early market space, robust commercial positioning and satellite navigation systems were used as GPS devices for outdoor environments. However, absence of satellite signals in the indoor space clearly indicated the requirement for new research technology, which is effective in the indoor conditions. Thus, indoor location technologies came into existence.

Increasing customer expectation and controlling infrastructure cost is playing a vital role in shaping the future of the indoor location market. Even though the adoption of indoor location is relatively slow due to lack of research resources and lack of awareness toward suitable solutions, these solutions are expected to grow steadily and generate strong traction across all the emerging venues, owing to the growing need of social connectivity on a real-time basis. Furthermore, indoor location impacts asset monitoring and automation at the enterprise level. The technology is expected to bring in integration capabilities of analytical software tools with the existing maps and navigation applications, and such applications will further enhance the growth of venues while ensuring customer privacy and confidentiality.

The indoor location market life cycle widely varies region wise. The overall market is

also at an amorphous stage with immense potential for growth in the next five years. APAC is expected to observe a high adoption rate of indoor location technology across various vertical markets. The growing BYOD trend is also contributing to the growth in the region. The indoor location market in Europe is expected to see a greater traction by the end of the forecast period due to the demand from retail, healthcare, and tourism & hospitality sectors.

World is about to see increasing adoption of indoor location solutions as major vendors are bringing customized, cost-effective, and technologically advanced solutions and are aggressively investing toward the research and development. Several start-up companies are coming with new and innovative technologies for location-based solutions whereas, big players such as Apple are acquiring tier I start-up companies to get the competitive edge.

The report provides an in-depth study of the market trends, market sizing, competitive mapping, and market dynamics of the indoor location market. The trends, drivers, and opportunities in the indoor location market distinctly indicate striking growth in the next five years. The indoor location market report is segmented by type of solution: tag-based, RF-based, sensor-based, and others; by type of application: indoor maps and navigation, indoor location-based analytics, tracking & tracing, and monitoring & emergency management; by type of service: consulting, managed services, system integration, and others; by type of verticals: academia & education, BFSI, government, public safety & urban security, healthcare, retail, media & advertising, manufacturing, distribution & logistics, oil, gas & mining, and tourism & hospitality; by regions: NA, APAC, Europe, MEA, and LA. Key players in this market include Apple, Broadcom, Cisco, Ericsson, Google, Nokia, Microsoft, Motorola, Qualcomm, and STMicroelectronics.

The indoor location market size is expected to grow from \$XX million in 2014 to \$XX million by 2019, at an estimated Compound Annual Growth Rate (CAGR) of XX%. The solution market size in the indoor location ecosystem is expected to grow from \$XX million in 2014 to \$XX million by 2019, at an estimated CAGR of XX%. The application market size in the indoor location ecosystem is expected to grow from \$XX million in 2014 to \$XX million by 2019, at an estimated CAGR of XX%. The services market size in the indoor location ecosystem is expected to grow from \$XX million in 2014 to \$XX million by 2019, at an estimated CAGR of XX%.

NA accounted for the largest market share, XX% of the global indoor location market in 2014, followed by Europe. A lot of companies, such as Apple, Broadcom, Cisco,

Google, Microsoft, Motorola, and Qualcomm offer products and services for indoor location. The unreliable GPS technologies in indoor location are driving the indoor location market. APAC is expected to grow at the highest rate in the next XX years with a CAGR of XX% due to the growing penetration of smart devices in the region.

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