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RTLS Market for Healthcare by Hardware (Tags/Badges, Readers/Trackers), Technology (RFID, Wi-Fi, UWB, BLE, Infrared, Ultrasound, GPS, Zigbee), Application (Inventory/Asset Tracking, Personnel Monitoring), Facility Type, Region - Global Forecast to 2028

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Abstracts

The market size of global RTLS market for healthcare is estimated to grow from USD 2.0 billion in 2023 to USD 5.8 billion by 2028, at a CAGR of 23.5%. Every year, hospitals experience various equipment failures such as refrigerator or freezer failure, resulting in the loss of medications, vaccines, tissue, blood, or food. An RTLS system automatically logs temperature and humidity and alerts personnel so that healthcare facilities can monitor and address such issues before any loss or patient harm ensues. RTLS technology also supports the documentation of corrective action for out-of-range conditions and provides a variety of reports to support regulatory audits. Hence, RTLS can significantly help healthcare organizations to achieve a high RoI.

'Hospitals & healthcare facilities segment to hold largest share of the market during the forecast period”

Hospitals and healthcare facilities across the world use RTLS platforms for various applications, including inventory/asset tracking and management, personnel/staff locating and monitoring, access control and security, environmental monitoring, and supply chain management and operational automation/visibility. RTLS solutions provide real-time information about the location of assets and people in these facilities, thereby ensuring that the right person and required equipment is available at the right time for taking care of patients. Besides having information about the status and location of staff

members, patients, and assets, it also helps in enhancing the safety and security in a hospital or healthcare facility. Hence, hospitals and healthcare facilities across regions are adopting RTLS solutions.

“Infrared technology is expected to grow at a significant CAGR during the forecast period”

RTLS solutions based on infrared (IR) technology combined with other RTLS technologies such as Wi-Fi, RFID, or UWB are being used in both room-level and sub-room-level accuracy applications. IR tags send out signals modulated with their unique ID into the room or zone using a small battery. IR receivers are mounted in fixed locations, and they pick up the tag’s signal and unique ID and forward the data via Wi-Fi or LAN connection to a host computer or networked/cloud database. IR tags use the IR spectrum to track assets/personnel. Some leading technology providers across the world are showing an interest in integrating IR and ultrasound technologies with RF and Wi-Fi technologies to enhance the accuracy levels of their RTLS products.

“The market in Europe is expected to grow at an impressive CAGR during the forecast period”

Europe is one of the major regions for R&D in the field of location-based solutions. Most of the individual customers or enterprises in Europe extensively use location-based and mapping services, which lead to major revenue growth. The growing need for enhancing business efficiency in the healthcare sector is expected to be the vital driver for the RTLS market growth in Europe. Some key location-based solution vendors in this region include Ubisense Ltd. (UK), Identec Solutions AG (Austria), Decawave (Ireland), and Sewio Networks (Czech Republic). Additionally, rising government support by providing increased funding for improving healthcare facilities by utilizing advanced technology-based products with improved capabilities, such as RTLS solutions, has benefitted the growth of the RTLS market for healthcare in countries like the UK and Germany.

Breakdown of the profiles of primary participants:

By Company Type: Tier 1 - 45%, Tier 2 - 20%, and Tier 3 - 35%

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

By Region: North America - 40%, Europe - 30%, Asia Pacific - 325, and RoW -

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5%

Major players profiled in this report are as follows: Securitas Healthcare, LLC (US), Zebra Technologies Corporation (US), Aruba Networks (US), Impinj, Inc. (US), Savi Technology (US), TeleTracking Technologies, Inc. (US), CenTrak, Inc. (US), Advantech Co., Ltd. (Taiwan), GE HealthCare Technologies Inc. (US), and others.

Research Coverage

In this report, the RTLS market for healthcare has been segmented based on offering, technology, application, facility type, and region. The RTLS market for healthcare based on offering has been segmented into hardware, software, and services. Based on technology, the market has been segmented into RFID, Wi-Fi, UWB, BLE, Ultrasound, Infrared, and other technologies. Based on application, the market has been segmented into inventory/asset tracking & management, personnel locating & monitoring, access control & security, environmental monitoring, supply chain management & automation, and other applications. Based on facility type, the market has been segmented into hospitals & healthcare facilities, and senior living facilities. The study also forecasts the size of the market in four main regions—North America, Europe, Asia Pacific, and RoW.

Key Benefits of Buying the Report:

The report provides insights on the following pointers:

Analysis of key drivers (Rising market competitiveness driving the availability of cost-effective RTLS, High return on investment (RoI) with reduced capital expenditure, High accuracy of UWB-based RTLS solutions, Rising security and safety concerns of patients/staff), restraints (Data security and privacy issues, High installation and maintenance costs), opportunities (Growing need for efficient resource utilization and workflow optimization, Rising popularity of hybrid RTLS solutions, Growing adoption of IoT solutions in healthcare, Increasing demand of RTLS solutions in developing countries) and challenges (Trade-offs in designing RTLS solutions, Lack of system compatibility and common standards) influencing the growth of the RTLS market for healthcare.

Product Development/Innovation: Detailed insights on new product launches, technologies, research & development activities, and industry partnerships in the RTLS market for healthcare.

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Market Development: Comprehensive information about lucrative markets – the report analyses the RTLS market for healthcare across regions such as North America, Europe, Asia Pacific, Middle East, and South America & Africa.

Market Diversification: Exhaustive information about new products & technologies, untapped geographies, and recent developments in the RTLS market for healthcare.

Competitive Assessment: In-depth assessment of market ranking/market share, growth strategies, and product offerings of leading players like Securitas Healthcare, LLC (US), Zebra Technologies Corporation (US), Aruba Networks (US), Impinj, Inc. (US), and Savi Technology (US), among others in the RTLS market for healthcare.

Strategies: The report also helps stakeholders understand the pulse of the RTLS market for healthcare and provides them information on key market drivers, restraints, challenges, and opportunities.

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*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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About

RTLS is referred to as a local positioning and tracking system that utilizes wireless technologies to detect the exact location of assets and personnel of an enterprise and allows the tracking and management of these assets in real time with the help of active tags and badges. RTLS system comprises battery-powered tags/badges, sensors, readers, network infrastructure, and software. The ever increasing need of workflow automation and optimization by controlling and managing assets of an enterprise is the major driving factor for the growth of this market. The market demand of advanced tracking systems, like RTLS in healthcare, is growing at a fast pace. The main advantages provided by RTLS in healthcare include enhanced asset management, improved safety, hand hygiene, and identification and verification activities.

In this report, the global RTLS in healthcare market is broadly classified on the basis of technology, application, device and equipment type, and geography. The global RTLS market by implementation technology comprises RFID technology, Wi-Fi, Ultra Wide Band, ZigBee, Infrared, Ultrasound, and others (Combined technology, GPS, and Bluetooth). The application segment includes the following: asset tracking and management, patient tracking, personnel and staff tracking, staff safety and workflow automation, temperature monitoring, and others (hand hygiene, medical sterilization, providing data for electronic medical records systems, and ambulatory care facilities).

There are wide applications of RTLS in healthcare such as par level management, asset utilization, shrinkage control and preventive maintenance, and assistance provided in the high and rapid return on investment. The market is also categorized into four major geographic regions, namely Americas, Europe, APAC, and ROW.

This report also presents a detailed overview of the overall RTLS market in healthcare by enveloping all the major market segments, with a detailed qualitative analysis at each and every phase of the segmentation. All the numbers are forecasted from 2013 till 2020, to give a glimpse of the future potential in this market within the forecast period.

The major companies included in the report are AeroScout (U.S.), Awarepoint Corporation (U.S.), Ekahau (U.S.), Elpas (U.S.), GE Healthcare (U.K.), Infor (U.S.), Motorola Solutions (U.S.), Radianse (U.S.), Siemens Healthcare (Germany),

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Sonitor Technologies (Norway), Thingmagic (U.S.), Versus Technology (U.S.), Vizbee RFID Systems (France), and Zebra Technologies Corporation (U.S.) among many others.

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