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Real Time Location Systems (RTLS) For Healthcare Market Forecasts to 2034 – Global Analysis By Offering (Software, Hardware and Services), Technology (Radio Frequency Identification (RFID), WIFI, Ultra-Wideband, ZigBee, Infrared and Other Technologies), Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Real Time Location Systems (RTLS) for Healthcare Market is accounted for $3.8 billion in 2026 and is expected to reach $15.0 billion by 2034 growing at a CAGR of 18.6% during the forecast period. Real-Time Location Systems (RTLS) in healthcare refer to technologies that enable the tracking and monitoring of the location of medical equipment, personnel, patients, and other assets in real-time within a healthcare facility. RTLS play a crucial role in infection control by monitoring the movement of healthcare staff and identifying potential points of contact between patients and medical professionals. It enhances operational efficiency, improve patient care, and meet regulatory requirements.

According to the World Health Organization, the global shortage of healthcare workers could reach 10 million by 2030.

Market Dynamics:

Driver:

Rising healthcare costs

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Healthcare facilities often face challenges in managing and locating medical equipment, which can lead to increased costs due to equipment loss, downtime, or the need for additional inventory. RTLS can help streamline asset management by providing real-time information on the location and status of equipment, potentially reducing the financial impact associated with equipment-related issues. By optimizing the use of resources and reducing inefficiencies, healthcare organizations may aim to control costs.

Restraint:

Privacy and security concerns

RTLS systems often involve the tracking of individuals or assets, raising concerns about invasion of privacy. People may be uncomfortable with the idea of being constantly monitored, and this discomfort can lead to resistance in adopting RTLS solutions. There is also a risk of the collected location data being misused for purposes other than the intended ones. Therefore, concerns about privacy and security can erode public trust in the technology and impede the market expansion.

Opportunity:

Rising telemedicine & remote patient monitoring

The growth of telemedicine and remote patient monitoring has led to an increased demand for healthcare services that can be delivered remotely. With the expansion of telemedicine, there's a need to track mobile medical equipment, devices, and even personnel in real-time to ensure efficient and effective healthcare delivery. RTLS can play a crucial role in tracking patients, especially in scenarios where remote monitoring is necessary. Integration of RTLS with electronic health records (EHR) systems becomes more critical with the growth of telemedicine. It leads to increased collaboration and innovation in the market.

Threat:

Integration complexities

Integrating RTLS with existing infrastructure, such as Wi-Fi networks, RFID systems, or other communication technologies, can be complex. Managing power consumption and integrating with power management systems is critical to ensuring the longevity of

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device operation without frequent battery replacements. Also, scalability is a common challenge, especially in large and dynamic environments. Further, factors such as network latency, security concerns, customization for industry-specific needs and data interoperability also impede the market growth.

Covid-19 Impact

The covid-19 pandemic had a significant impact on healthcare sector. The need for efficient tracking of medical equipment and assets became more critical during the pandemic. Hospitals and healthcare facilities experienced an increased demand for RTLS to monitor the location and status of equipment such as ventilators, infusion pumps, and personal protective equipment (PPE). The demand for RTLS solutions in healthcare saw growth during the pandemic, driven by the urgent need for improved tracking and monitoring capabilities. This growth is expected to continue as healthcare systems prioritize technologies that enhance efficiency, safety, and responsiveness to future healthcare challenges.

The inventory/asset tracking & management segment is expected to be the largest during the forecast period

The inventory/asset tracking & management segment is estimated to have a lucrative growth. RTLS play a crucial role in healthcare, particularly in the area of inventory and asset tracking and management for inventory visibility, asset management, patient flow and workflow optimization. RTLS ensures compliance with regulatory requirements by providing accurate records of the movement of these items. Further, the implementation of RTLS in healthcare for inventory and asset tracking and management brings about operational efficiencies, cost savings, regulatory compliance, and enhanced patient care, ultimately contributing to the overall effectiveness of healthcare delivery.

The emergency medical services segment is expected to have the highest CAGR during the forecast period

The emergency medical services segment is anticipated to witness the highest CAGR growth during the forecast period. RTLS help to monitor the real-time location of ambulances, ensuring that the nearest available vehicle is dispatched to an emergency. In emergencies, it allows healthcare providers to quickly locate patients, whether they are in the emergency room, operating room, or other areas of the facility. RTLS provides a record of the movement of patients, ambulances, and personnel, aiding in compliance with regulations and standards. It also facilitates documentation for billing

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and reporting purposes.

Region with largest share:

Asia Pacific is projected to hold the largest market share during the forecast period owing to the rising adoption of healthcare technologies. The growing manufacturing sector in China is generating massive demand for RTLS solutions to improve operational efficiency and lower operational costs by tracking equipment, goods, materials, work orders, assembly lines, and distribution in manufacturing facilities, which is anticipated to drive market growth in the country. In addition, the high adoption of RTLS technologies in Japan, South Korea, China, and Australia is expected to drive the RTLS market in Asia Pacific for the healthcare vertical.

Region with highest CAGR:

Asia Pacific is projected to have the highest CAGR over the forecast period, owing to rising patient population and increasing penetration of internet. The healthcare industry is booming in emerging economies of the world, i.e., India and China. The growing adoption of Industry 4.0 and IoT in manufacturing in the Asia-Pacific region has fuelled the implementation of RTLS systems. The healthcare, transportation and logistics, industrial production, government, and defense industries are at the edge of radio technology-based RTLS implementation. The rising adoption in several verticals is boosting the market demand.

Key players in the market

Some of the key players profiled in the Real Time Location Systems (RTLS) for Healthcare Market include Sumitomo Corporation, Vizzia Technologies, Aruba Networks, CYBRA Corporation, Enlighted Inc, Savi Technology, Cerner Corporation, Zebra Technologies, Ubisense Limited, GE Healthcare, Sonitor Technologies, Airista Flow, Teletracking Technologies, Centrak Inc, Oracle Corporation and Midmark Corporation.

Key Developments:

In October 2023, Enlighted has announced new AI capabilities for its Location Services RTLS solution, which now provides over 98% accuracy in tracking asset and personnel badge location. This solution is particularly useful in healthcare and manufacturing, where understanding the exact location of assets is essential.

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In October 2023, Vizzia Technologies, a leading provider of RTLS for healthcare, has been selected by a nationally recognized health network to track thousands of specialty medical devices, monitor hand hygiene, and generate real-time data analytics to improve healthcare efficiencies and patient care.

In July 2023, CYBRA Corporation announced their RFID-based tracking solution for the health and sciences industry, highlighting its value for inventory control. Edgefinity IoT® is a platform for building integrated applications that locate and help protect people, assets, and vehicles using RFID, RTLS, and other sensor technologies.

Offerings Covered:

- Software
- Hardware
- Services

Technologies Covered:

- Radio Frequency Identification (RFID)
- WIFI
- Ultra-Wideband
- ZigBee
- Infrared
- Other Technologies

Applications Covered:

- Access Control & Security

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- Inventory/Asset Tracking & Management
- Personnel Locating & Monitoring
- Supply Chain Management & Automation
- Environmental Monitoring
- Other Applications

End Users Covered:

- Senior Living Facilities
- Hospitals
- Clinics
- Emergency Medical Services
- Diagnostic Labs

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK

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- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

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- China
- India
- Australia
- New Zealand
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- Rest of Asia Pacific

South America

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- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia

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UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

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SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Contents

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5 GLOBAL REAL TIME LOCATION SYSTEMS (RTLS) FOR HEALTHCARE MARKET, BY OFFERING

6 GLOBAL REAL TIME LOCATION SYSTEMS (RTLS) FOR HEALTHCARE MARKET, BY TECHNOLOGY

7 GLOBAL REAL TIME LOCATION SYSTEMS (RTLS) FOR HEALTHCARE MARKET, BY APPLICATION

8 GLOBAL REAL TIME LOCATION SYSTEMS (RTLS) FOR HEALTHCARE MARKET, BY END USER

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9 GLOBAL REAL TIME LOCATION SYSTEMS (RTLS) FOR HEALTHCARE MARKET, BY GEOGRAPHY

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List Of Tables

LIST OF TABLES

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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