

# Infection Surveillance Solutions Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Offering (Software, Service), By End User (Hospitals, Long-term Care Facilities), By Region and Competition

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## Abstracts

Global Infection Surveillance Solutions Market has valued at USD 557.21 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.86% through 2028. An infection surveillance solution is a software used by healthcare facilities, including hospitals, to report patient data to state and federal authorities. These solutions play a crucial role in the healthcare industry by collecting data on nosocomial infections, studying infection patterns, and regulating their spread within the community. Nosocomial infections are infections transmitted to individuals within hospitals or healthcare centers. This software promptly alerts hospital Internet Protocol (IP) addresses in the event of infection occurrences. This enables HAI specialists and nurses to promptly provide appropriate treatment to infected patients, preventing outbreaks. Infection surveillance solutions are vital programs that facilitate the effective management of Healthcare-Acquired Infections (HAIs) in healthcare facilities. Common examples of HAIs include pneumonia, gastrointestinal illness, urinary tract infections, primary bloodstream infections, and post-surgical infections. The high incidence of HAIs is a significant concern for governments worldwide, leading to the development of policies aimed at effectively managing and reducing these incidents.

### Key Market Drivers

#### Increasing Prevalence of Hospital-Acquired Infections

The increasing prevalence of hospital-acquired infections (HAIs) is driving the demand

for infection surveillance solutions. Hospital-acquired infections, also known as healthcare-associated infections, are infections that patients acquire while receiving medical treatment in healthcare facilities. These infections can lead to prolonged hospital stays, increased healthcare costs, patient discomfort, and, in severe cases, even mortality. In response to this growing concern, infection surveillance solutions are being sought after to help prevent, monitor, and manage HAIs. HAIs pose a significant threat to patient safety and well-being. The rising awareness of these concerns has prompted healthcare facilities to prioritize infection control.

The increasing emphasis on hospital safety is driving the market for infection control surveillance solutions. Hospitals are actively seeking ways to enhance patient safety and reduce infection rates through improved surveillance strategies. This transformation commenced in the late 2000s with the introduction of electronic medical record systems, which allowed for more efficient and accurate patient data collection. Presently, hospitals are investing in advanced solutions to detect and predict infections, implement evidence-based protocols, and monitor outcomes over time. These solutions leverage data analytics, AI, ML, and predictive modeling to facilitate accurate identification and mitigation of infection risks. Apart from enhancing patient safety, these solutions offer potential benefits such as cost reduction, operational efficiency improvement, and optimization of care quality.

### Increasing Number of Surgeries

The increasing number of surgeries is driving the demand for infection surveillance solutions. Surgeries, while often necessary for medical treatment, carry a risk of post-operative infections, which can lead to complications, extended hospital stays, increased healthcare costs, and patient discomfort. Infection surveillance solutions play a critical role in monitoring and preventing healthcare-associated infections (HAIs), including those that occur after surgical procedures. Surgical procedures can introduce pathogens into the body, increasing the risk of infections at the surgical site. Infection surveillance solutions help healthcare facilities monitor surgical sites and detect infections early, leading to prompt interventions. Surgical site infections can lead to complications such as wound dehiscence, sepsis, and prolonged recovery. Effective infection surveillance solutions aid in preventing these complications, improving patient outcomes. Surgeons and healthcare professionals rely on data-driven insights to make informed decisions. Infection surveillance solutions provide real-time data and analytics to monitor infection trends, identify potential outbreaks, and inform clinical decisions. The increasing number of surgeries amplifies the importance of infection surveillance solutions in preventing post-operative infections and improving patient outcomes. As

healthcare facilities recognize the impact of infection control on patient safety, quality of care, and financial sustainability, the demand for these solutions is expected to continue to rise.

### Growing Government Initiatives & Investment in IPC Programs Across Healthcare Settings

Infection surveillance solutions are utilized in healthcare settings to empower healthcare professionals in predicting and preventing the transmission of infectious diseases. By early detection, evaluating intervention effectiveness, and identifying risk reduction tools, these solutions play a crucial role. Governments worldwide are implementing policies and regulations to develop long-term prevention programs and educate healthcare providers on infection prevention and control best practices. In addition to maintaining public statistical records, governments offer funding to healthcare centers and organizations for advanced infection surveillance software installation. These initiatives enable healthcare facilities of varying sizes to efficiently utilize cutting-edge tools, contributing to the growth of the infection control surveillance solutions market.

### Growing Investments to Improve Healthcare Systems by AI integration

Investments in healthcare systems often prioritize patient safety and quality of care. Infection surveillance solutions play a vital role in identifying and preventing healthcare-associated infections (HAIs), thus contributing to improved patient safety outcomes. Healthcare systems are focusing on quality improvement initiatives to reduce adverse events, including HAIs. Infection surveillance solutions provide real-time monitoring, data analysis, and early detection of potential outbreaks, supporting these initiatives. HAIs lead to increased healthcare costs due to prolonged hospital stays, additional treatments, and readmissions. Investments in infection surveillance solutions can lead to significant cost savings by preventing infections and their associated complications.

Cloud-based and AI-integrated infection surveillance and control software is a critical technology that empowers public health organizations to swiftly and effectively detect and respond to infections. Over the years, advancements in cloud-based and AI-integrated software have significantly enhanced the efficacy and efficiency of infection surveillance and control. By leveraging cloud-based solutions, public health organizations can efficiently and securely store and manage large volumes of data. Furthermore, real-time access to this data enables more responsive action during outbreaks. Another notable progress in cloud-based and AI-integrated infection surveillance and control software is the integration of machine learning algorithms.

These algorithms enable public health organizations to derive more comprehensive insights from the data, facilitating a better understanding of underlying infection patterns and informed response strategies.

## Key Market Challenges

### High Cost of Deployment for Small Healthcare Organizations

The high cost of deployment for small healthcare organizations is a significant factor restraining the growth of Infection Surveillance Solutions (ISS). These solutions often require initial investment in technology, infrastructure, staff training, and ongoing maintenance. For small healthcare organizations with limited budgets and resources, the cost of implementing and sustaining infection surveillance solutions can be a barrier to adoption. Small healthcare organizations often operate with tighter budgets compared to larger institutions. The high upfront and ongoing costs associated with infection surveillance solutions can strain their financial resources, making it difficult to allocate funds for implementation. Small healthcare organizations may need to prioritize their resources for essential services and treatments. Investing in infection surveillance solutions might divert resources away from other critical needs, making the decision challenging. Beyond the initial deployment, infection surveillance solutions require ongoing maintenance, updates, and technical support. Small healthcare organizations might struggle to allocate resources for these continuous operational needs.

### Data Security Concerns

Infection surveillance solutions require the collection and storage of patient health data, including personal and medical information. Ensuring the privacy of this data is crucial to maintain patient trust and comply with regulations like the Health Insurance Portability and Accountability Act (HIPAA) in the United States. Healthcare organizations are subject to strict data protection regulations and standards, which can vary by region. Failure to comply with these regulations can lead to severe penalties. Implementing ISS while ensuring compliance adds complexity and cost to the process. The software and hardware used in ISS solutions can have vulnerabilities that hackers could exploit to gain unauthorized access. Addressing these vulnerabilities requires continuous monitoring, updates, and security measures. Many ISS solutions involve third-party vendors and cloud services for data storage and management. This introduces additional security concerns, as healthcare organizations need to trust that these vendors have robust security measures in place.

## Key Market Trends

### Cloud-based Software Solutions

Cloud-based software solutions are expected to significantly boost the Infection Surveillance Solutions (ISS) market in the future. Cloud technology offers a range of benefits that align well with the needs of healthcare organizations seeking efficient and scalable infection surveillance solutions. Cloud-based solutions offer scalability to accommodate the varying needs of healthcare organizations, whether they are small clinics or large hospitals. As the demand for infection surveillance solutions grows, cloud platforms can easily scale up to handle increased data volume and user activity. Traditional on-premises software solutions require significant investments in hardware, servers, and IT infrastructure. Cloud-based solutions eliminate these upfront costs, making ISS more accessible to healthcare organizations with limited resources. Cloud-based solutions are typically quicker to implement compared to on-premises alternatives. This is particularly advantageous for healthcare organizations looking to deploy infection surveillance solutions rapidly. Cloud-based solutions provide remote access to infection surveillance data for authorized personnel. Healthcare professionals can securely access and monitor infection data from various locations, enabling more efficient and timely interventions. Cloud-based infection surveillance solutions enable real-time monitoring of infection trends, allowing healthcare organizations to respond promptly to potential outbreaks and implement necessary interventions.

### Increasing Consolidation in The Healthcare Industry

Increasing consolidation in the healthcare industry is expected to boost the Infection Surveillance Solutions (ISS) market in the future. Healthcare industry consolidation refers to the merging of hospitals, healthcare systems, and medical facilities into larger entities. As healthcare organizations consolidate, there is a greater focus on standardizing practices across different facilities. This includes infection control protocols and the adoption of common technology solutions like ISS to ensure consistent monitoring and management of infections. Consolidated healthcare entities often seek to integrate and share patient data seamlessly. Infection surveillance solutions that offer interoperability and data sharing capabilities are crucial for tracking infections across different departments and locations.

### Segmental Insights

### Product Type Insights

Based on the offering, the market is categorized into software and services. In 2022, the software segment dominated the market. Conversely, the services segment is projected to demonstrate a higher Compound Annual Growth Rate (CAGR) during the forecast period, owing to the increased adoption of software packages in healthcare facilities. The software segment is expected to witness the highest CAGR throughout the forecast period. This growth can be attributed to its advantages over on-premises software, including availability in different configurations, rapid return on investment, and real-time analysis. Furthermore, healthcare IT companies are introducing innovative solutions in data management, analytics, and infrastructure, facilitating easier data collection of electronic health records (EHR), infection, and epidemic trends through their software packages.

### End User Insights

The infection surveillance solutions market, categorized by end user, is divided into hospitals, and long-term care facilities. Among these, the hospitals segment holds the largest market share and exhibits the highest growth rate during the forecast period. The significant prevalence of healthcare-associated infections (HAIs) and the subsequent financial burden on stakeholders have propelled the adoption of infection control products and services in hospitals. Additionally, the substantial patient volume and the increasing incidence of surgical site infections (SSIs) contribute to the market's growth. Notable HAIs commonly reported in hospitals include central line-associated bloodstream infections, methicillin-resistant *Staphylococcus aureus* (MRSA), vancomycin-resistant enterococci bloodstream infections, *Clostridium difficile* infections, and SSIs.

### Regional Insights

The North American region has demonstrated dominance in market share compared to other regions. This can be attributed to strict regulations and the presence of numerous firms offering infection surveillance solutions in the region. The government's substantial investment in healthcare has led to an increase in the number of healthcare centers. On the other hand, the APAC region is experiencing the highest growth rate. This can be attributed to increased health awareness, higher healthcare expenditure, a growing number of healthcare centers, and significant improvements in health insurance.

### Key Market Players

Cerner Corporation

Epic Systems Corporation

VigiLanz Corporation

Becton, Dickinson and Company

Premier Inc.

DEB Group Ltd

RL Solutions

Baxter International Inc. (ICNet International)

Gojo Industries Inc.

IBM Corporation (Truven Health Analytics)

#### Report Scope:

In this report, the Global Infection Surveillance Solutions Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Infection Surveillance Solutions Market, By Offering:

Software

Service

#### Infection Surveillance Solutions Market, By End User:

Hospitals

Long-term Care Facilities

## Infection Surveillance Solutions Market, By Region:

### North America

United States

Canada

Mexico

### Europe

France

United Kingdom

Italy

Germany

Spain

### Asia-Pacific

China

India

Japan

Australia

South Korea

### South America

Brazil

Argentina



Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Infection Surveillance Solutions Market.

Available Customizations:

Global Infection Surveillance Solutions market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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