

U.S. Health Care Buildings: Wireless and Cellular Nodes Forecast, 2019- 2024

Market Study
First Quarter 2020





U.S. Health Care Buildings: Wireless and Cellular Nodes Forecast, 2019-2024

Market Study

Published First Quarter 2020

Version 2.0

Report Number: 01Q2020-05

iGR

12400 W. Hwy 71

Suite 350 PMB 341

Austin TX 78738

Table of Contents

Abstract	1
Executive Summary	3
Table A: Cellular/Wireless Nodes Deployed in U.S. Health Care Buildings, 2019-2024	4
Figure A: Cellular/Wireless Nodes Deployed in U.S. Health Care Buildings, 2019-2024	4
What This Means	5
Methodology.....	6
Health Care Buildings	7
What is required for a Connected Health Care Building?	9
Health Care Case Studies	9
Technologies Behind Connected Health Care	10
5G New Radio	11
URLLC	12
Massive IoT.....	12
5G Services and Use Cases	13
CBRS	13
Forecast and Methodology	15
COVID-19 Impact	15
Building-specific assumptions	15
Table 1: Commercial Buildings in the U.S.	16
Technology-specific assumptions	17
Inpatient Health Care Buildings	19
Sub 6 GHz Bands.....	19
Table 2: Sub 6 GHz Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024	19
Figure 1: Sub 6 GHz Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024.....	20
CBRS.....	20
Table 3: CBRS Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024	20
Figure 2: CBRS Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024.....	21
mmWave.....	21
Table 4: mmWave Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024.....	21
Figure 3: mmWave Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024	22
Wi-Fi.....	22
Table 5: Wi-Fi Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024	22
Figure 4: Wi-Fi Nodes in Inpatient HC Buildings, Actuals and TAM, 2019-2024.....	23
Outpatient Health Care Buildings	24
Sub 6 GHz Bands.....	24
Table 6: Sub 6 GHz Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024	24



Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2020 iGillottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682

Figure 5: Sub 6 GHz Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024.....	25
CBRS	25
Table 7: CBRS Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024	25
Figure 6: CBRS Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024	26
mmWave	26
Table 8: mmWave Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024	26
Figure 7: mmWave Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024	27
Wi-Fi	27
Table 9: Wi-Fi Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024	27
Figure 8: Wi-Fi Nodes in Outpatient HC Buildings, Actuals and TAM, 2019-2024.....	28
Summary	29
Table 10: Cellular/Wireless Nodes Deployed in U.S. Health Care Buildings, 2019-2024.....	29
Figure 9: Cellular/Wireless Nodes Deployed in U.S. Health Care Buildings, 2019-2024	30
Definitions	31
Definitions Table	31
About iGR	53
Disclaimer	53



Abstract

There are many thousands of hospitals (inpatient buildings) and medical offices/facilities (outpatient buildings) in the U.S. Not all of these buildings are good candidates for in-building wireless (IBW) systems, but many are – and many already have distributed antenna systems (DAS) and Wi-Fi systems deployed to handle employee (doctors, nurses, etc.), support staff, third-party vendors, patient and visitor voice/data traffic.

This market study provides a five-year forecast for the number of Sub 6 GHz, CBRS, mmWave and Wi-Fi nodes expected to be deployed in the U.S. Five-year total addressable market forecasts for these technologies are also provided.

This version 2.0 of the market study provides an updated forecast based on the expected impact of the global virus COVID-19, as iGR understands it today.

Key questions addressed in this study:

- What are inpatient and outpatient health care buildings? What applications and services are enabled in a smart/connected health care building?
- What technologies are required for a smart health care building?
- What is 5G NR?
- How does 5G NR impact health care buildings?
- What is CBRS?
- How does CBRS impact health care buildings?
- What is the total addressable market for Sub 6 GHz, CBRS, mmWave and Wi-Fi nodes in U.S. health care buildings?
- How many Sub 6 GHz, CBRS, mmWave and Wi-Fi nodes are expected to be deployed in U.S. health care buildings between 2019 and 2024?

This market study is recommended for:

- Mobile operators, particularly those servicing the U.S. market
- Mobile backhaul providers, including telcos and cable MSOs



Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2020 iGillottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682

- Wired and wireless backhaul vendors and solution providers
- Mobile OEMs, particularly those servicing the U.S. market
- Wired and wireless infrastructure vendors, particularly those servicing the U.S. market
- Financial and investment analysts.

