

Global Healthcare-IT End User Perceptions

TekPlus Healthcare-IT End User Report provides **an in-depth perception of senior healthcare executives** on the global Health Informatics Market. In particular, it covers their expectations from Hospital Information Systems (HIS) and the Picture Archiving and Communication Systems (PACS).

TekPlus has conducted in-depth face-to-face and phone based interviews with executives across the end-user community using a structured questionnaire. The types of end-users interviewed for this study are across a spectrum of all sizes of hospitals, academic institutions, nursing homes and diagnostic practices.

The interviews were directed at people either responsible for or influencing acquisition of HIS, PACS and other IT solutions within the organisations. Interviews include quantitative and qualitative information. The set of questions were designed to be easy to understand and allowed for the thought process to follow. 242 end-users were interviewed globally which resulted in 200 successful interviews all lasting around 25 minutes each.

For the purpose of this study, the Geographical regions covered are as follows.

- **AMERICAS**
 - USA
 - Canada
 - Latin America
- **EMEA**
 - Benelux (Belgium, Luxembourg and the Netherlands)
 - CESE and MEA (Central, Eastern and Southern Europe and Middle East & Africa)
 - France
 - Germany
 - Spain
 - Italy
 - United Kingdom
 - Scandinavia (Denmark, Finland, Norway, Sweden)
 - The Rest-of-Western Europe (Austria, Greece, Ireland, Iceland, Portugal and Switzerland)
- **ASIA**
 - Japan
 - Asia-Pacific
 - Rest of Asia.

TekPlus Analysis

End users

This section provides a sketch of the interviewees; the type of the end users we have interviewed, their geographic locations and their profiles. It would be thoughtful to note that the majority of our interviewees were 'C'-level executives of mid-to-large sized organisations.

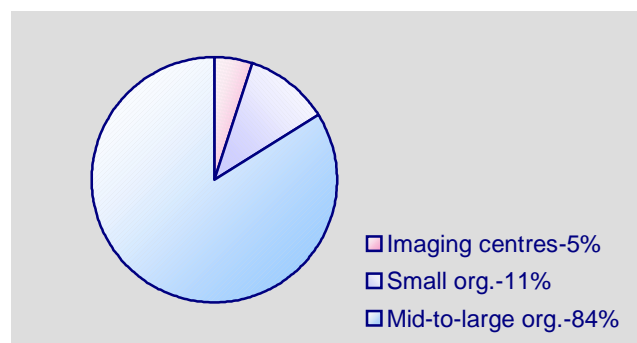
Types of end-users

For this report, we have successfully surveyed 200 interviewees across the globe. The type of end-users varied from small to large hospitals, academic institutions, nursing homes to imaging diagnostic centres. To simplify the process, we have grouped them into three categories –

- Small sized organisations (Up to 50 beds)
- Mid-to-large sized organisations (More than 50 beds)
- Imaging diagnostic centres

The major chunk of our end user database is composed of mid-to-large sized organisations. Figure 1 shows a diagrammatic representation of the interviewees from various end user types. Out of 200 interviewees, 168 belonged to mid-to-large sized organisations, 22 belonged to small sized healthcare organisations and 10 were from independent imaging diagnostic centres.

Figure 1: Percentage of Interviewees from different types of end users

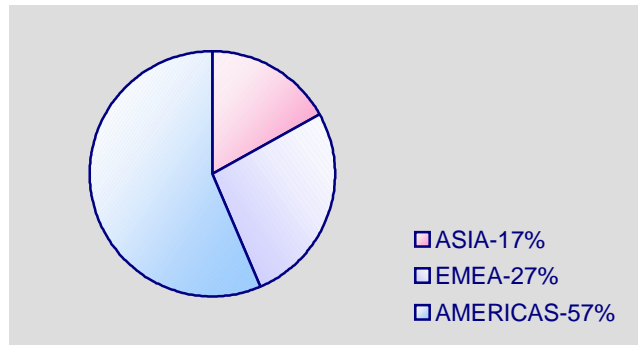


Source: TekPlus

Geographical location

The number of interviewees varied from region to region. Figure 2 shows the geographical coverage of the report. We had 34 respondents from ASIA, 52 respondents from EMEA and the rest, 114 from AMERICAS.

Figure 2: Geographical coverage

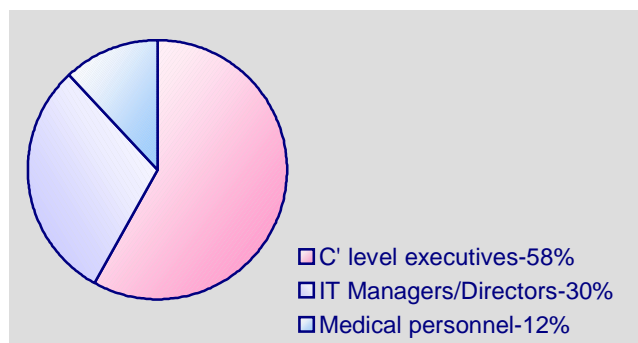


Source: TekPlus

Interviewee profile

We spoke to people who either acquire or influence the acquisition of HIS, PACS and other information solutions. They were mainly IT managers/IT Directors, CEOs, CIOs, CFOs and CMOs of the healthcare organisations; a small portion of the interviewees also included users (medical personnel like doctors, nurses and technicians). Out of 200 interviewees, 116 participants were 'C' – level executives (CEOs, CIOs, CFOs, CMOs), 60 were senior level IT Managers and IT Directors and the rest, 24 were users. Figure 3 illustrates the profile of the interviewees in terms of percentage.

Figure 3: Profile of Interviewees



Source: TekPlus

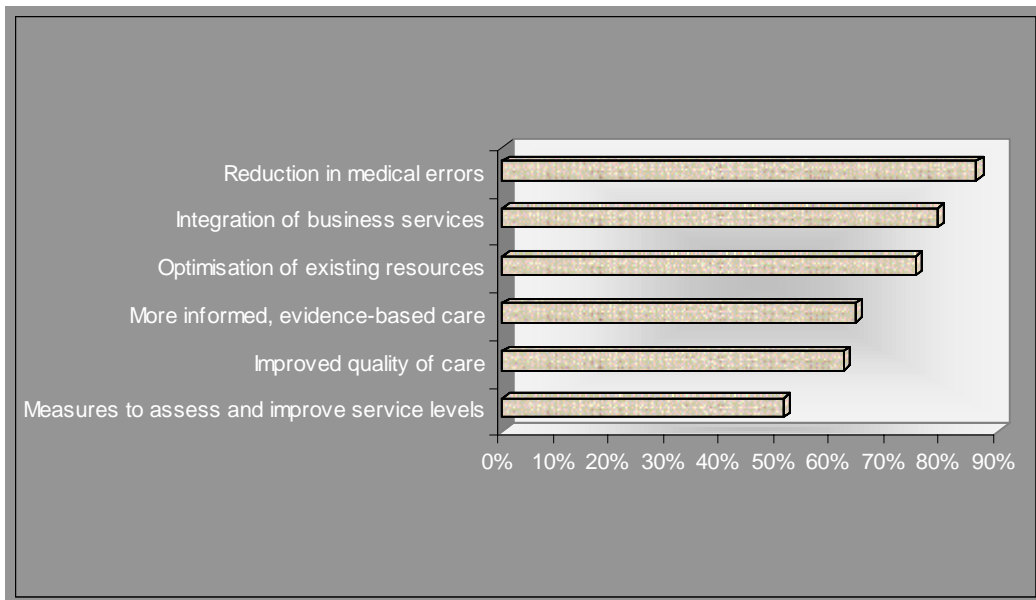
Some of the figures in the report;

Table 1: Most Quoted HIS and PACS brands by the End-users

	AMERICAS		EMEA		ASIA	
	HIS	PACS	HIS	PACS	HIS	PACS
1	McKesson	GE Healthcare	Siemens Medical	Agfa	Siemens Medical	Agfa
2	Cerner	Philips Medical	McKesson	Philips Medical	IBA Health	GE Healthcare
3	Siemens Medical	Kodak	Torex	GE Healthcare	iSoft	Fuji

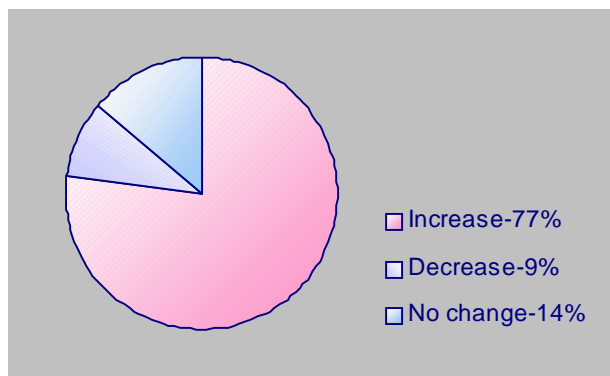
Source: TekPlus

Figure 4: Market Drivers

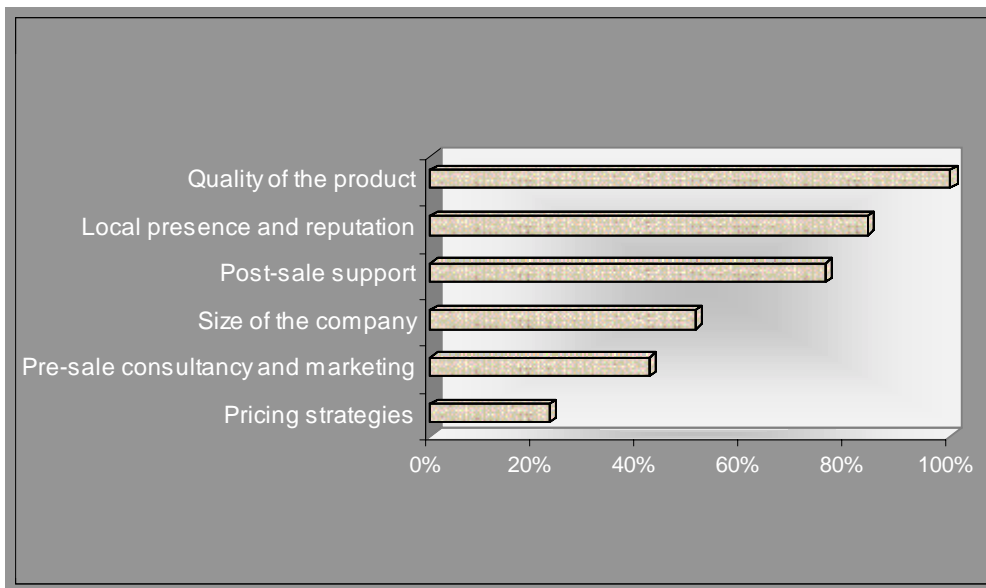


Source: TekPlus

Figure 19: Expected change in IT budget in the next financial year



Source: TekPlus

Figure 22: Factors used for Vendor Rating

Source: TekPlus

Ending Comments

As can be seen this is a comprehensive survey of high level decision makers globally in the Healthcare vertical on their usage of IT as well as Healthcare-IT systems. We have tried to cover most of the important issues surrounding this topic and hope that the results provide you with a comprehensive picture of what the End-Users are thinking about. More importantly we hope action flows from this study and that the information is used to make better decisions by the vendors going forward.

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