

Strategies for Next-Gen Healthcare Networks



Summary Results • April 2016

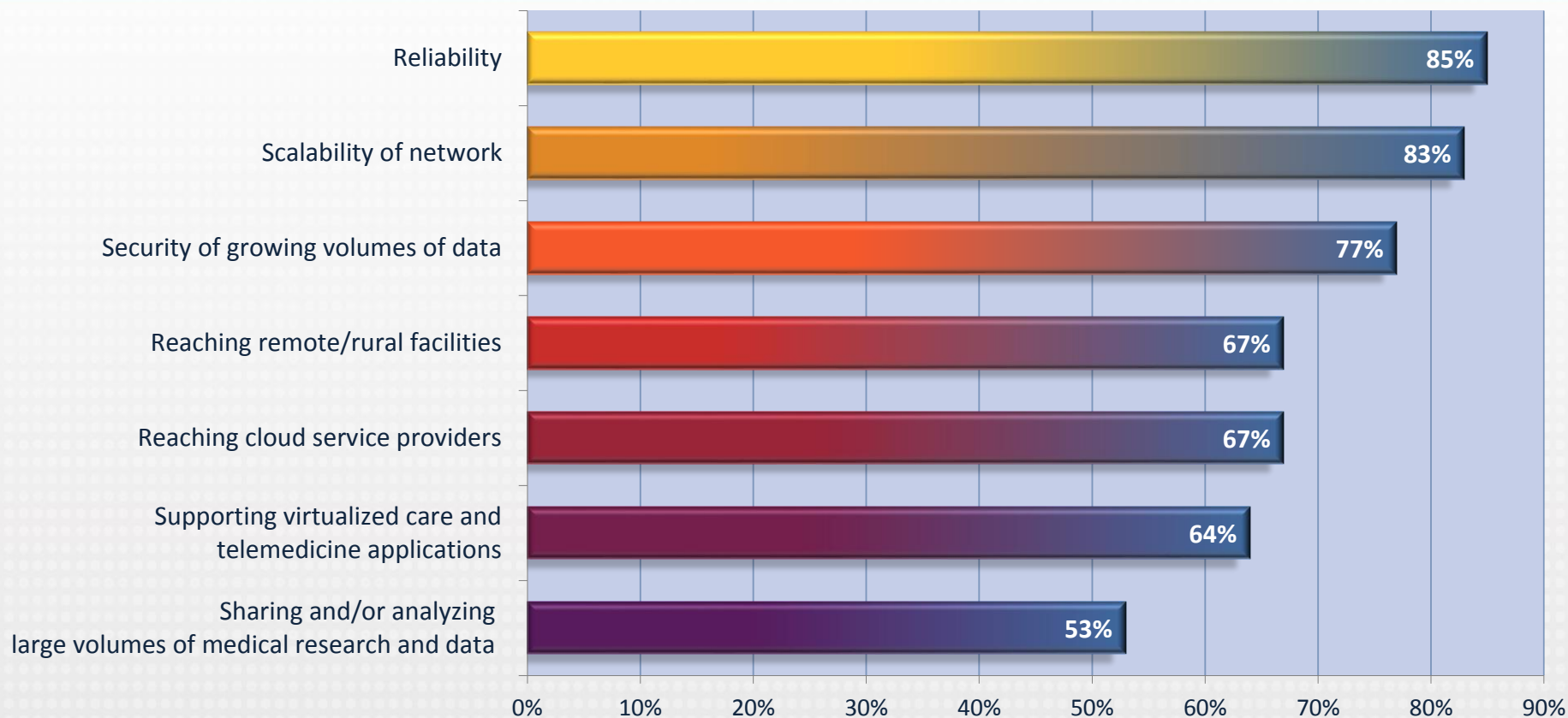
Program Overview

- Between February and March 2016, Gatepoint Research invited selected IT executives to participate in a survey themed ***Strategies for Next-Gen Healthcare Networks***.
- Candidates were invited via email and 100 executives have participated to date.
- Management levels represented are predominantly healthcare senior decision makers: 16% hold the title CxO, 16% are VPs, 67% are Directors, and 1% are Managers.
- Survey participants represent firms primarily from the healthcare industry (84%) but also represented are business services, consumer services, education, financial services, media, and wholesale trade.
- Responders work for firms with a wide range of revenue levels:
 - 12% work in Fortune 1000 companies with revenues over \$1.5 billion;
 - 18% work in Large firms whose revenues are between \$500 million and \$1.5 billion;
 - 17% work in Mid-Market firms with \$250 million to \$500 million in revenues;
 - 53% work in Small companies with less than \$250 million in revenues.
- 100% of responders participated voluntarily; none were engaged using telemarketing.

Observations and Conclusions

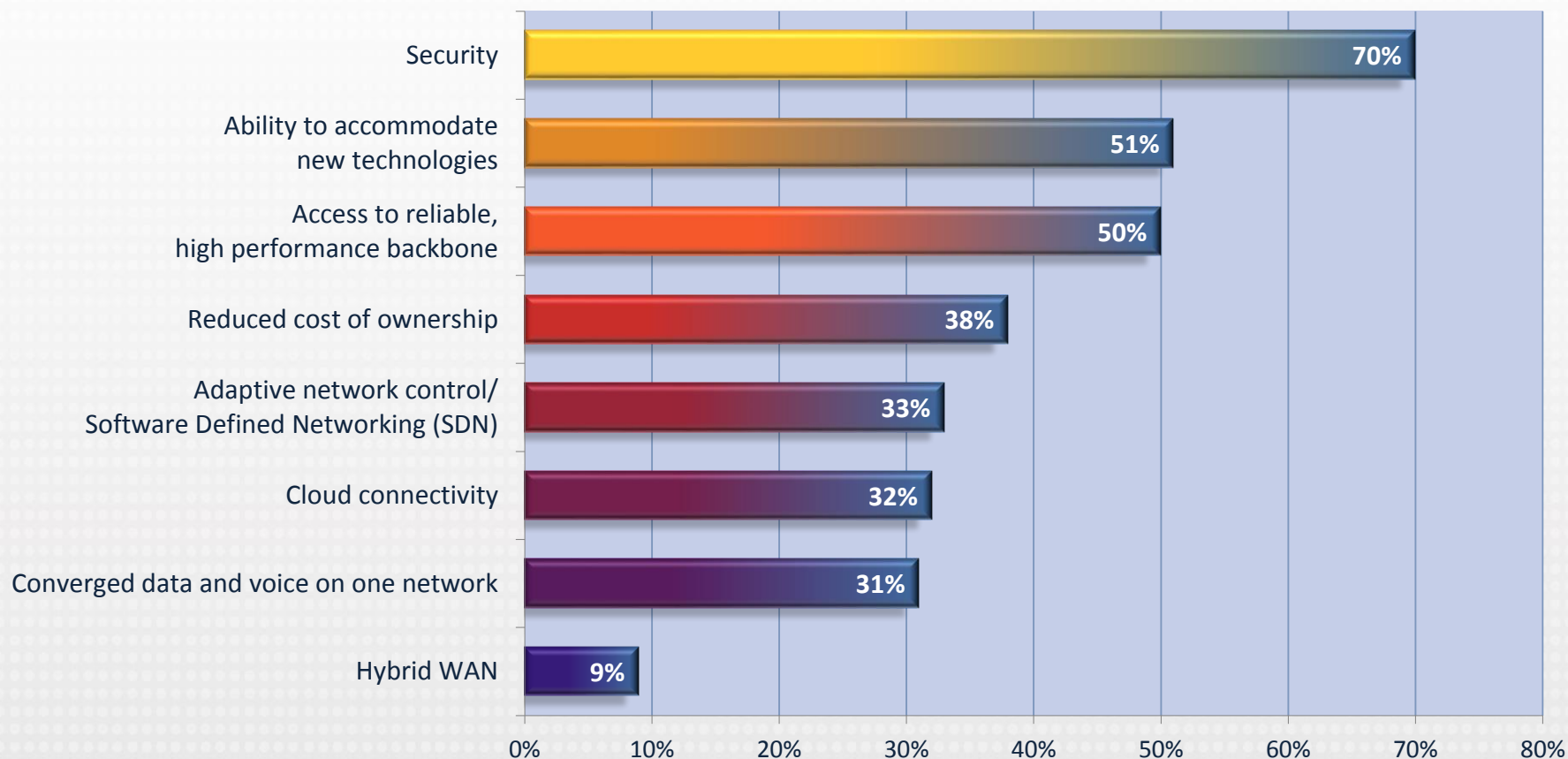
- **Long-term network expectations: good reliability, mediocre extendibility.** Although most respondents trust their networks' reliability over the next 3-5 years, far fewer believe they will handle future need for virtualized care (64%) or data analysis (53%).
- **Respondents demand security.** Outranking all other network enhancement priorities, survey respondents seek better security (70%). **Reliability and network security really matter.** When choosing network services and solutions, responders say the factors that have the greatest influence are reliability (76%) and network security (63%).
- **Office apps spearhead the move to the cloud.** Respondents anticipate the most likely candidates to migrate to the cloud in the next 5 years are office productivity applications (54%) followed by disaster recovery functions (41%).
- **Cloud service providers: Microsoft, Amazon, Google... N/A.** Respondents report using cloud service from Microsoft Azure (29%), Amazon and Google (19% each). But 42% did not identify a cloud service provider.
- **Network investment priorities:** Respondents report that network investment is driven by security (91%), followed by managing growth, boosting productivity, and rebuilding the network for anticipated future needs (82% each).
- **A wide variety of network providers.** Most responders report using multiple network providers, most commonly AT&T (54%), Verizon (43%), CenturyLink (29%) and Level 3 (25%).
- **Healthcare networks are due for an update.** 50% of those surveyed report their organizations will update their healthcare networks within 2 years; 29% within a year. **Network security are being overhauled, too.** 60% of respondents plan to update their network security within 2 years; 39% of those will update within a year.

Which aspects of your network infrastructure do you feel most confident will handle your requirements over the next 3-5 years?



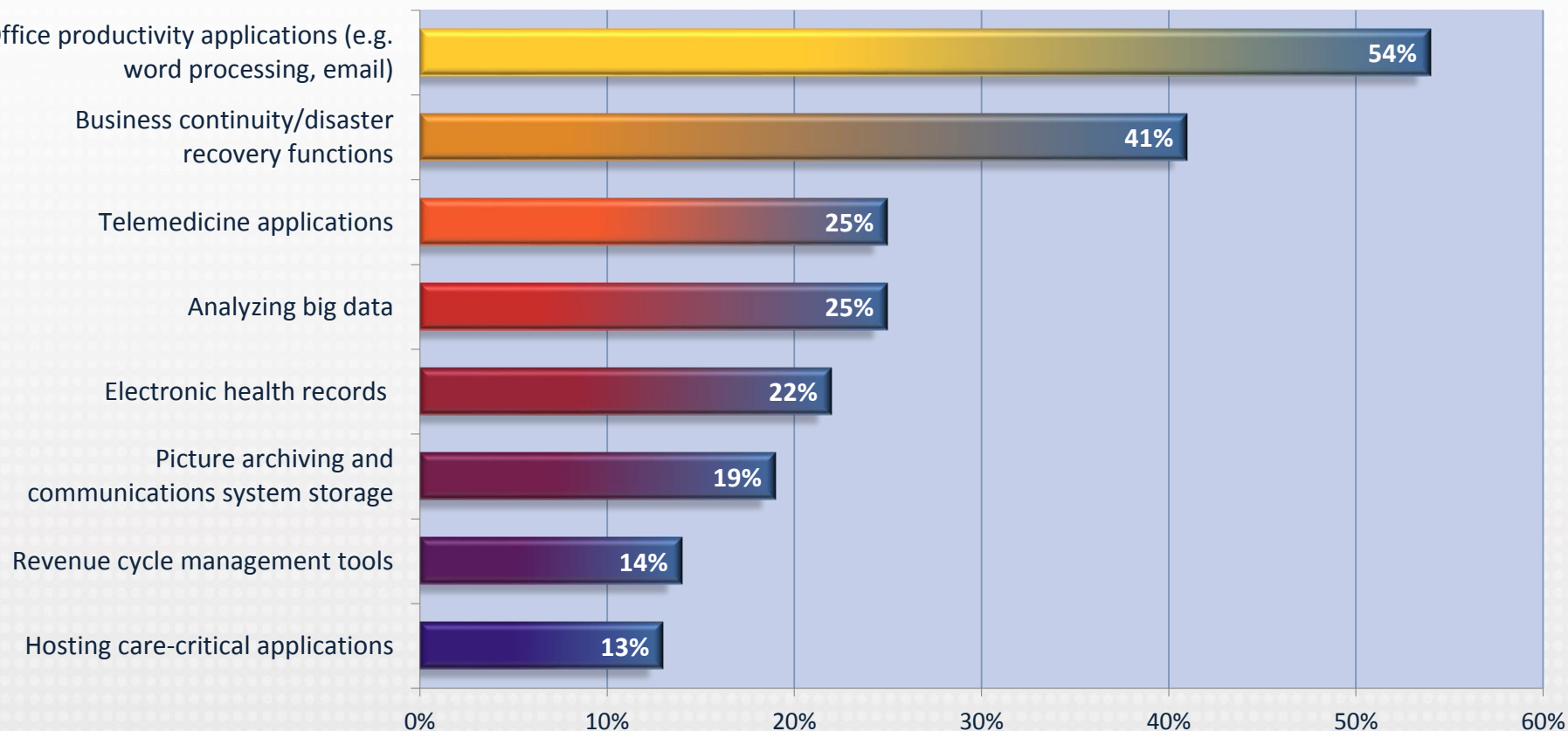
Long-term network expectations: good reliability, mediocre extendibility. Although most respondents trust their networks' reliability over the next 3-5 years, far fewer believe they will handle future need for virtualized care (64%) or data analysis (53%).

What are your priorities regarding network enhancements?



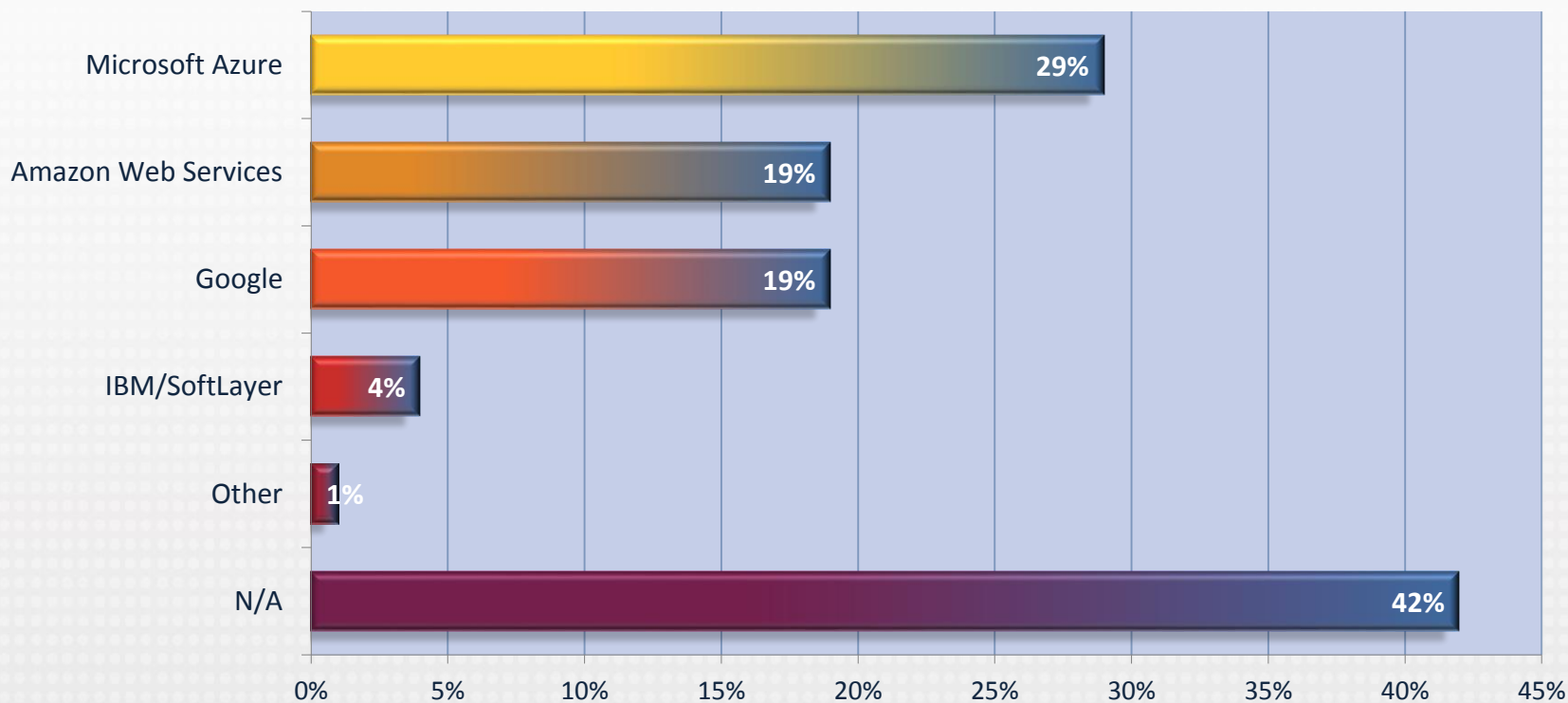
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Which applications/workloads do you anticipate moving to the cloud within the next 5 years?



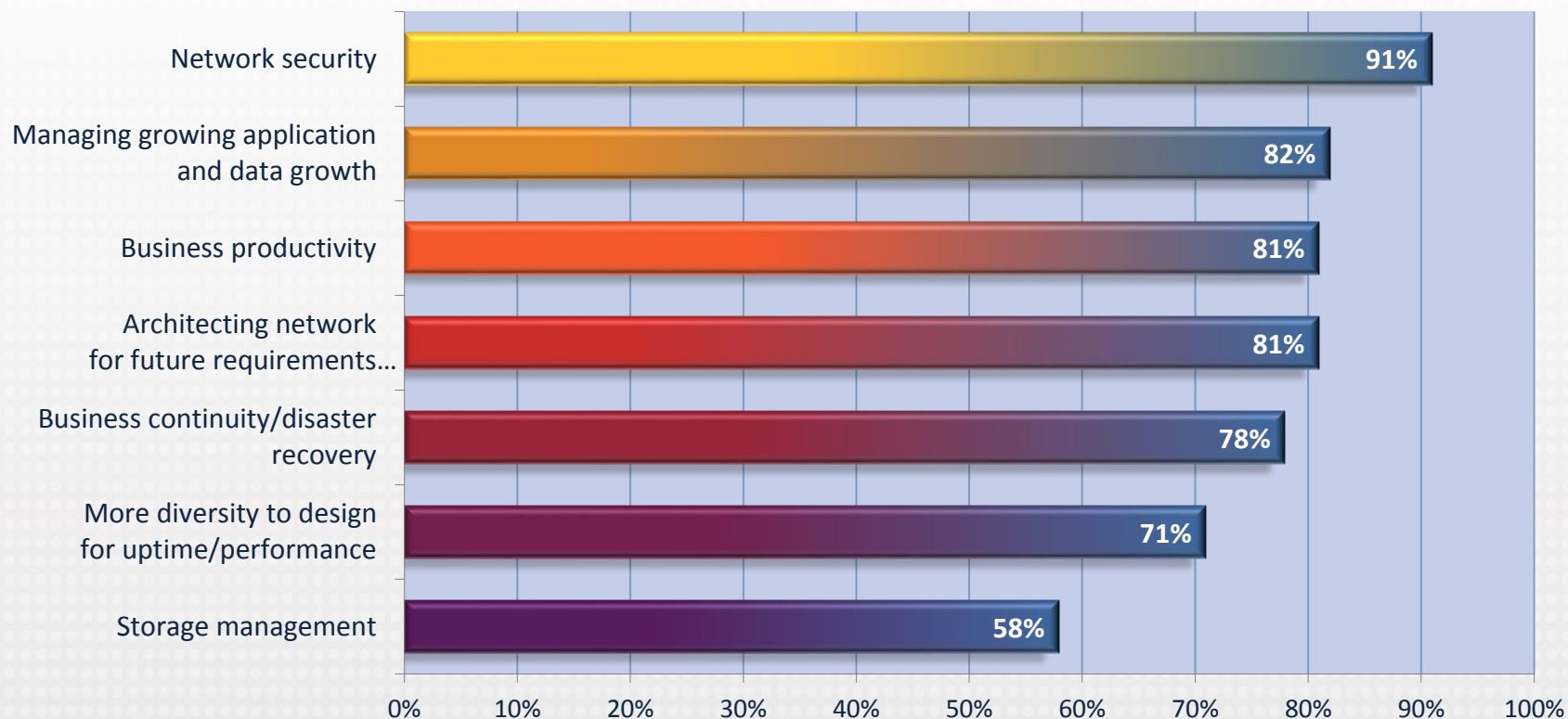
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Which cloud service providers do you currently use?



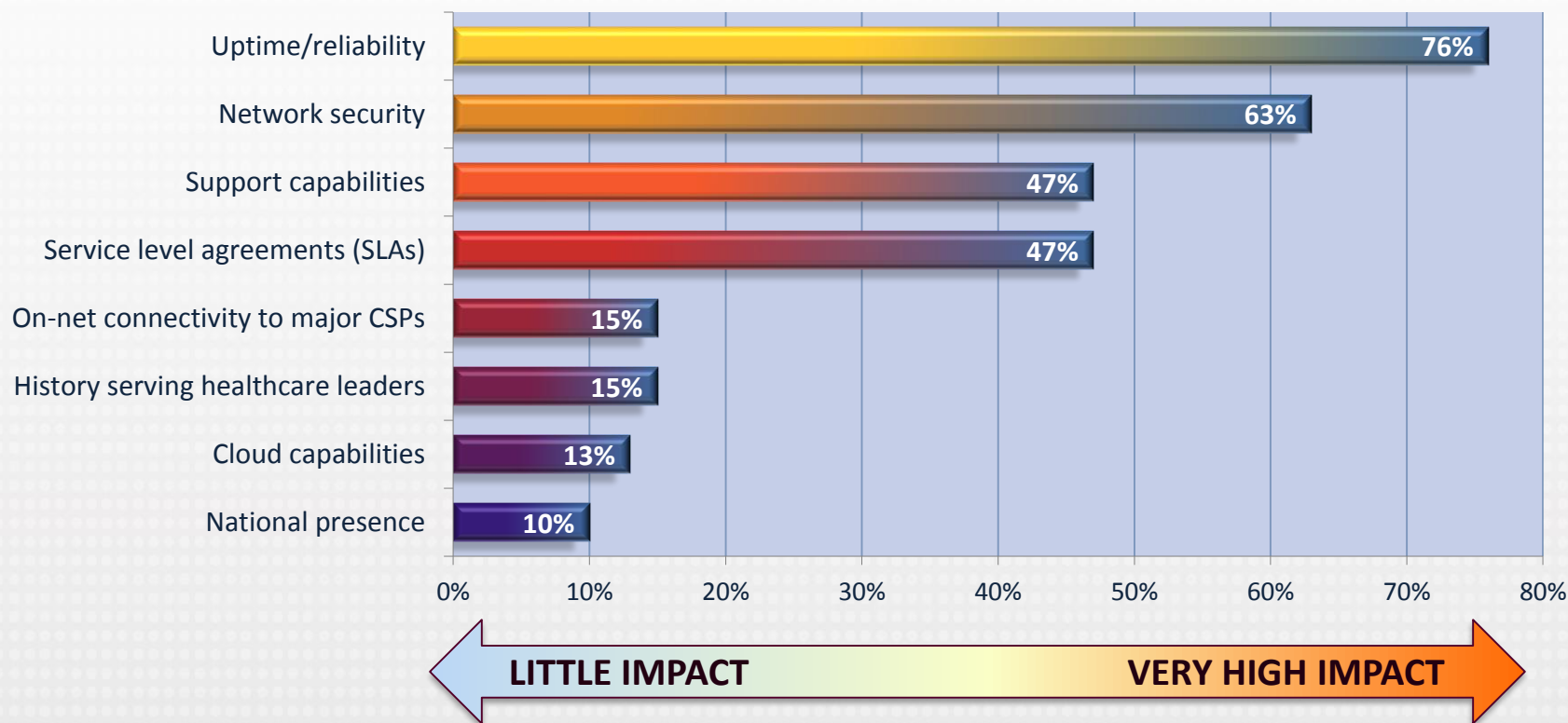
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What are the key drivers in determining network investments?



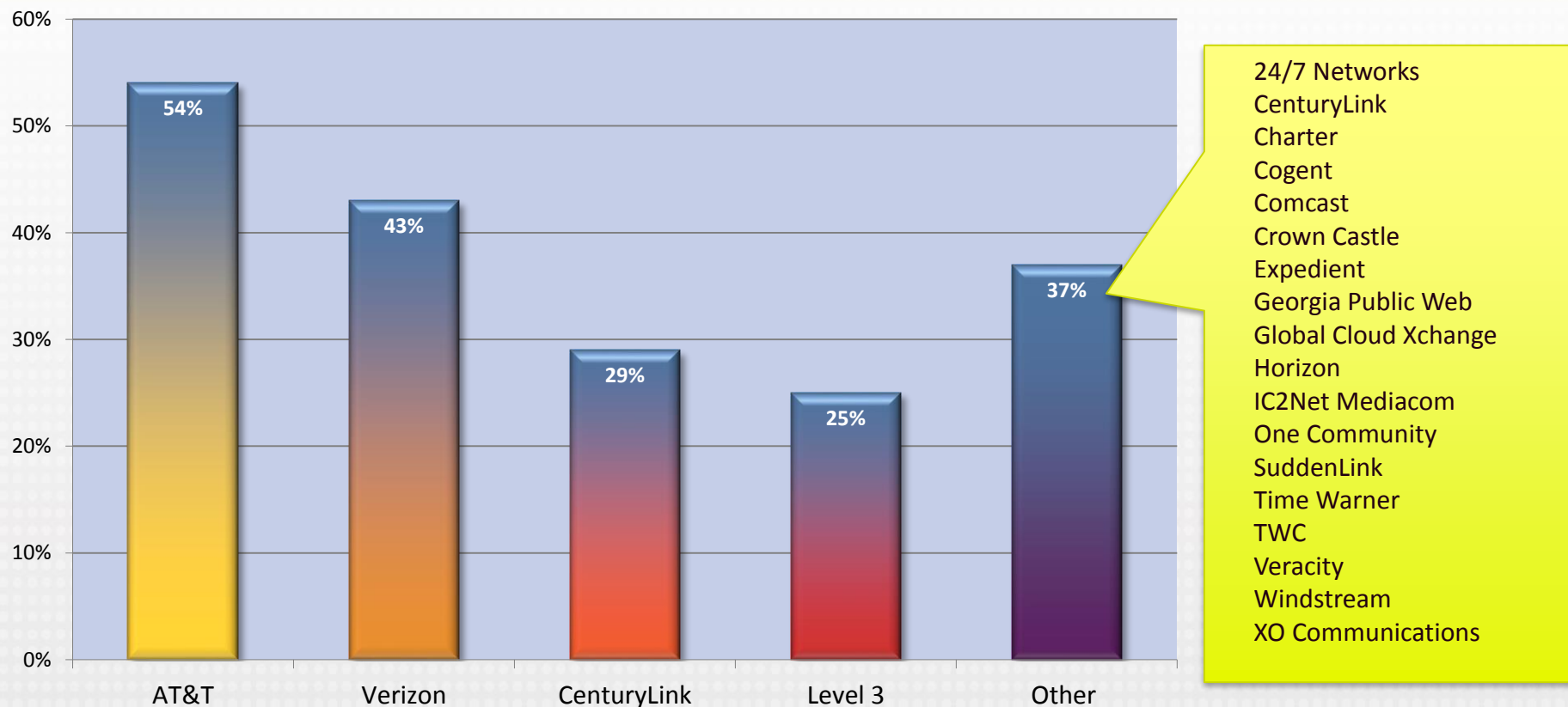
Network investment priorities: Respondents report that network investment is driven by security (91%), followed by managing growth, boosting productivity, and rebuilding the network for anticipated future needs (82% each).

What factors most influence your selection of network services and/or solutions providers?



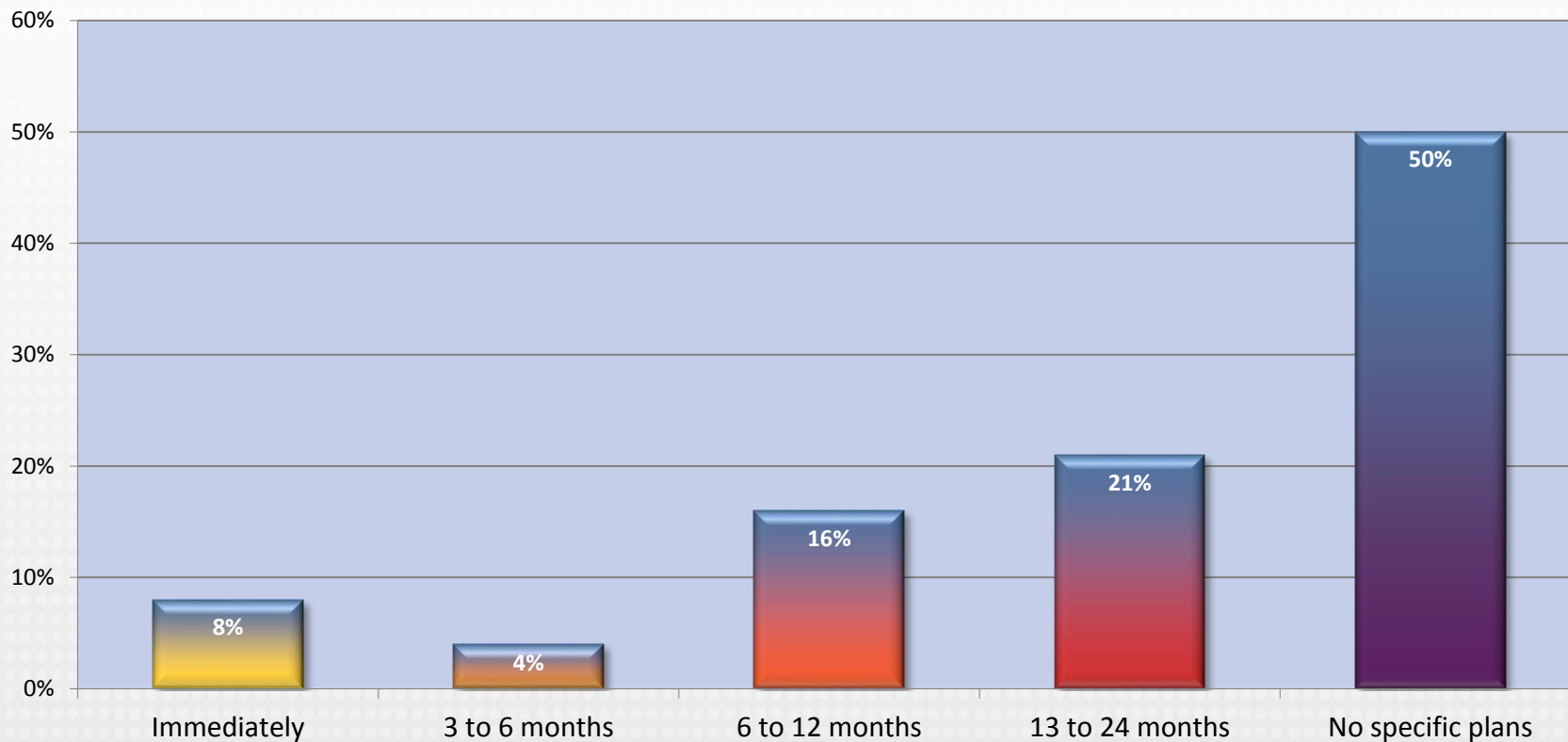
Reliability and network security really matter. When choosing network services and solutions, responders say the factors that have the greatest influence are reliability (76%) and network security (63%).

Which network provider(s) do you use currently?



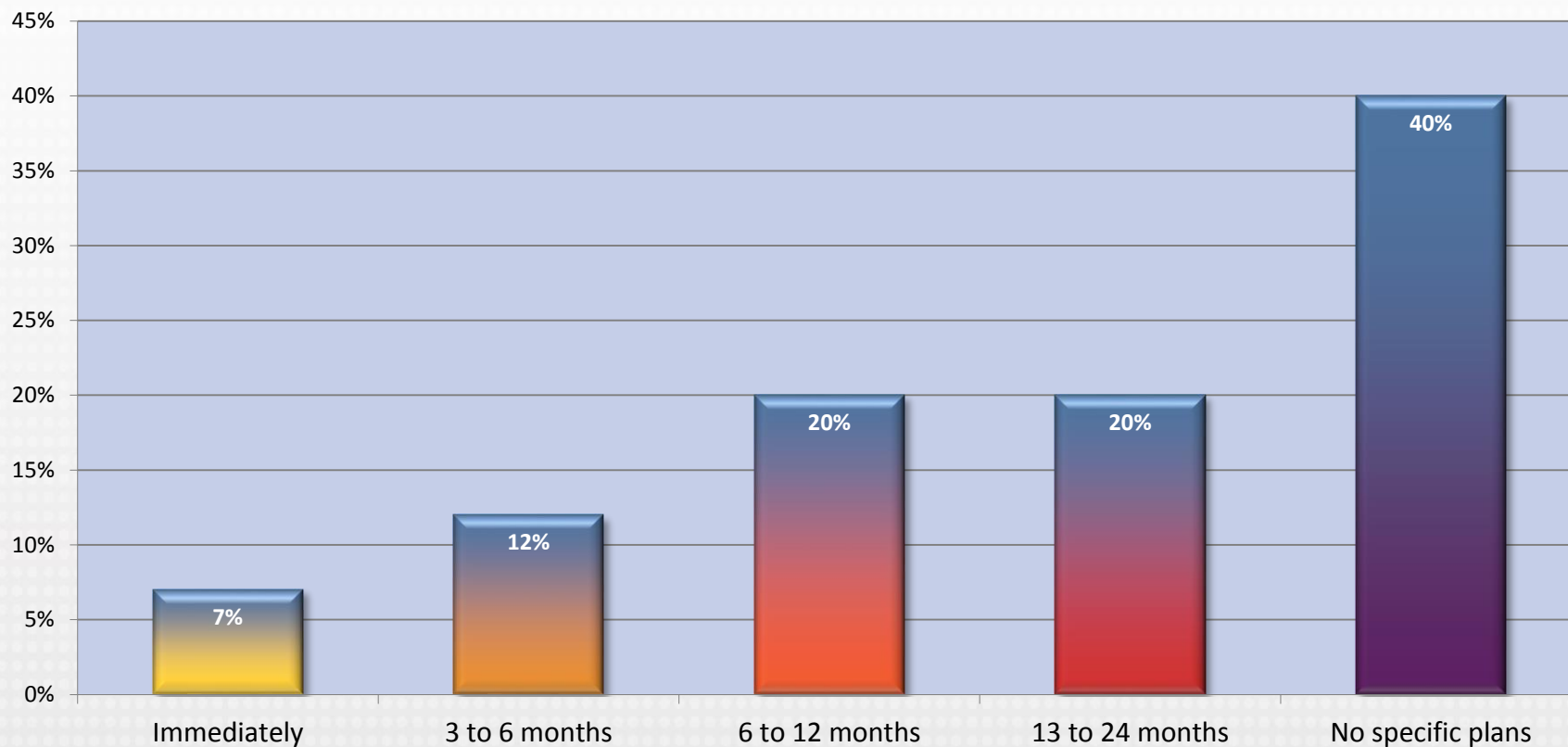
A wide variety of network providers. Most responders report using multiple network providers, most commonly AT&T (54%), Verizon (43%), CenturyLink (29%) and Level 3 (25%).

What is the likely timeline for a decision about updating your healthcare network for the future?



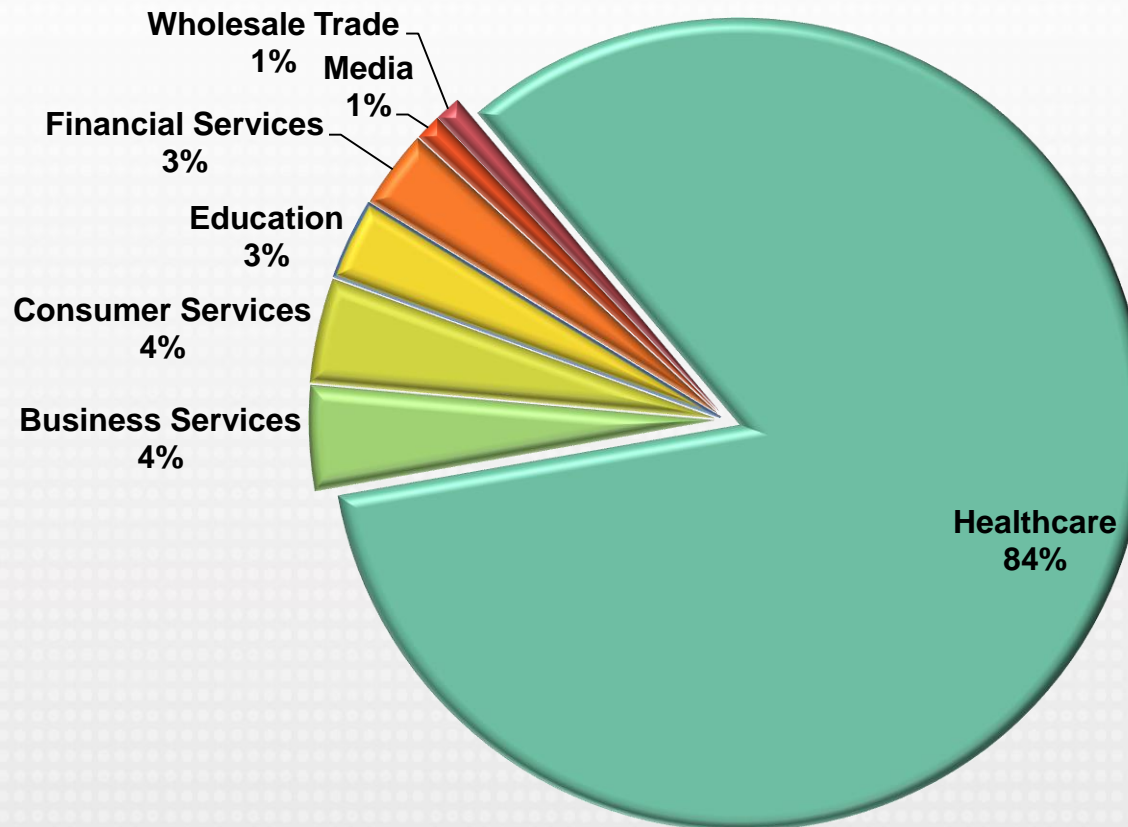
Healthcare networks are due for an update. 50% of those surveyed report their organizations will update their healthcare networks within 2 years; 29% within a year.

What is the likely timeline for a decision about updating your network security systems?



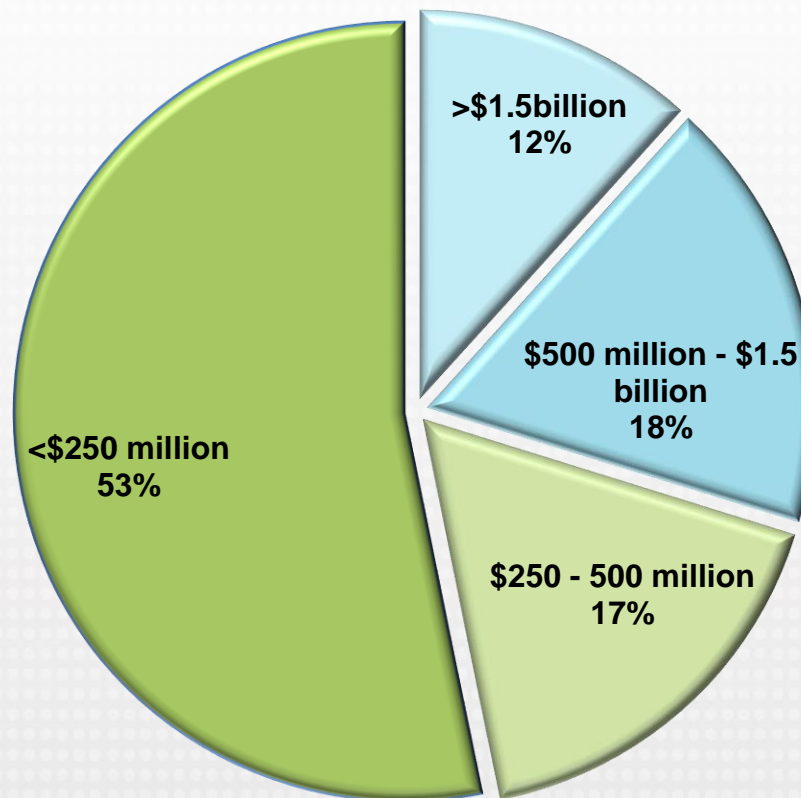
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Profile of Responders: Industry Sectors



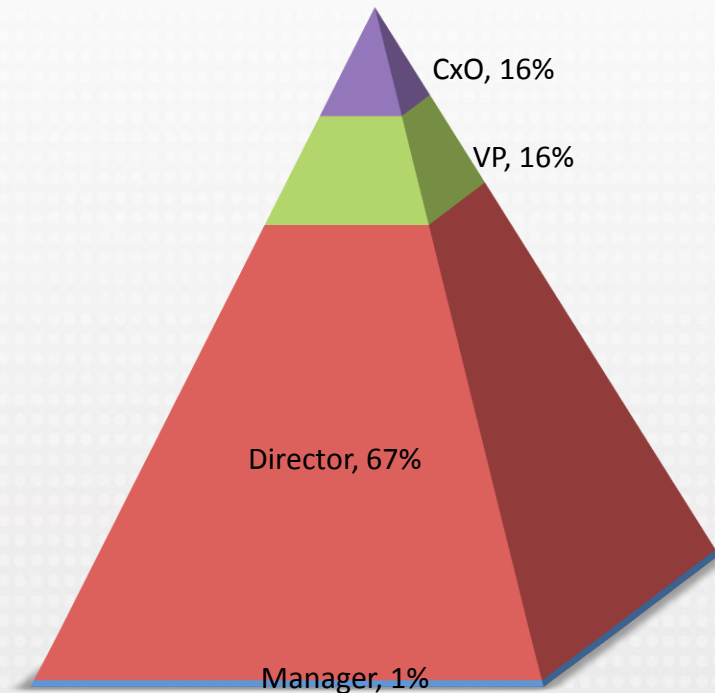
The great majority of those surveyed (84%) work in the healthcare industry.

Profile of Responders: Revenue



Responders' organizations vary in size: 53% have revenues below \$250 million; 12% work in Fortune 1000 firms with revenues over 1.5 billion.

Profile of Responders: Job Level



99% of those surveyed hold executive level positions in their organizations.



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