INDUSTRY SNAPSHOT: HEALTHCARE

The healthcare industry has the highest rate of "Innovators" in any industry at **47.2%**, far exceeding the average **37.7%**. Yet they are not your typical Innovators as they lack technological confidence and operational preparedness:

> **24.7%** feel at high risk of tech-led disruption
> They are slightly below average in their agility in responding to change (**22.5%** to industry average **23.1%**)

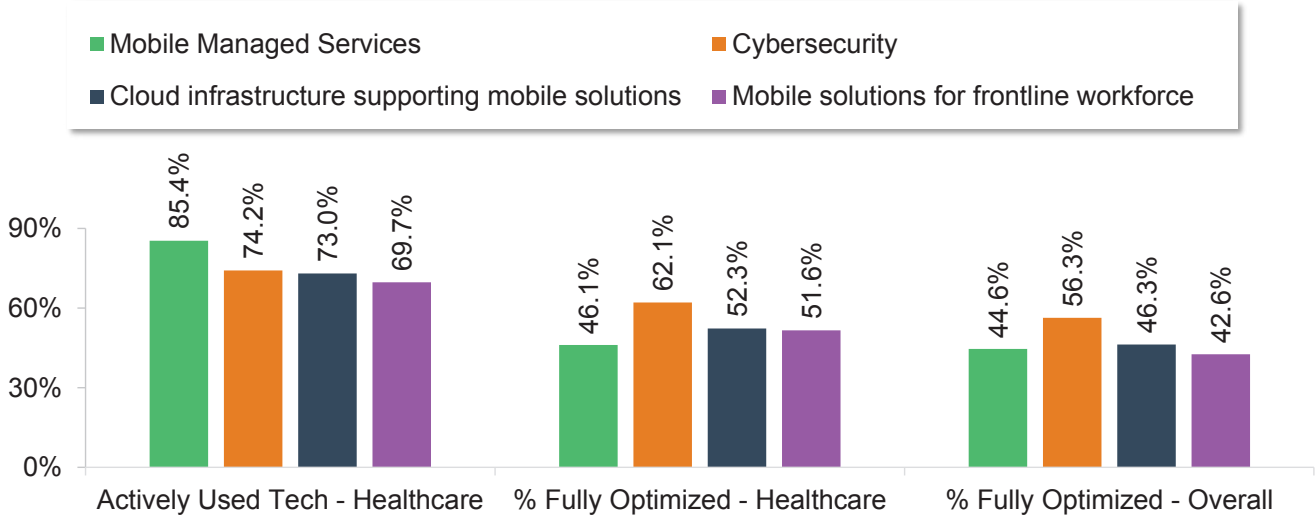
This incongruity between innovation and disruption seems largely owed to two unique factors in this segment. First, cybersecurity is the single most impactful technology for this segment through 2030, and as these organizations must subscribe to tougher security and regulatory compliance standards than most – they tend to bring IT support in-house. Second, this segment reports their biggest barrier to technology adoption and business agility is inadequate **internal** IT support.

> *"Waiting on infrastructure change is the biggest slowdown of tech adoption for the sector. And, for us, end user training is always a big issue for all technologies."*
> IT Operations & Services Manager, Healthcare

Yet, healthcare organizations remain open to partnerships with tech innovators and start-ups to build new skills and capabilities. They explore this territory cautiously, and industry/vertical-specific knowledge and experience is their single most important technology partner selection criteria (**52.8%**).

As represented in the below chart, healthcare organizations mirror overall trends with respect to the types and extent of technology deployed; MMS, cybersecurity, cloud infrastructure supporting mobile solutions and frontline workforce mobile solutions. However, they do seem to enjoy slightly higher full optimization rates of their most actively used solutions. This is likely attributable to the sector's commitment to partners with industry-specific experience and to pilot programs, both of which help minimize deployment disruptions.

CURRENT HEALTHCARE DEPLOYMENTS AND OPTIMIZATION AGAINST OVERALL OPTIMIZATION



Of the tech currently deployed, financial factors, ease of adoption and security vulnerabilities are top selection criteria – a strategic balance of affordability, usability and regulatory compliance. While the healthcare sector has an interest in next-gen solutions and may frequently deploy pilots of the latest technologies, they often do not have the support and ability to convert such investments into forwarding-looking technological confidence or strong operational agility.

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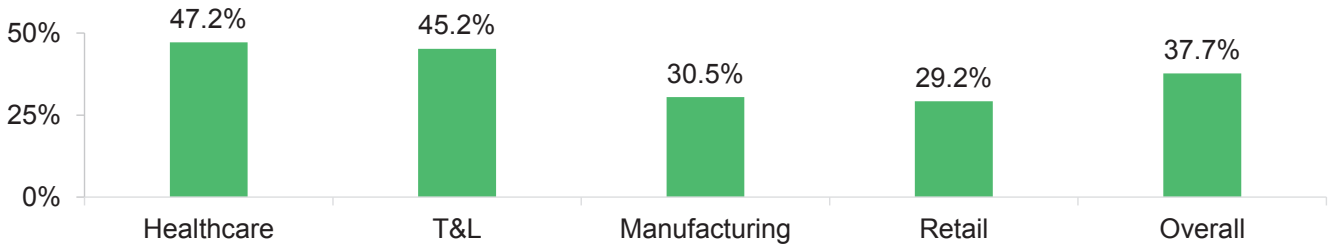
HEALTHCARE AT A GLANCE

HEALTHCARE'S MOBILE MATURITY

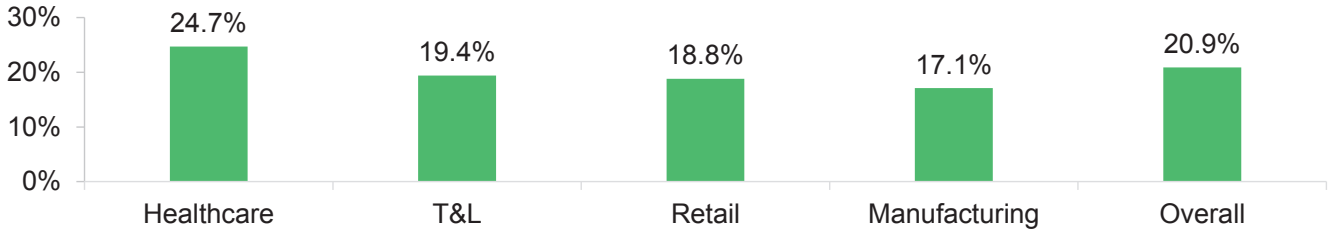
47.2% to **37.7%**: The rate of Innovators in the healthcare industry compared to the overall average.

RATE OF INNOVATORS BY INDUSTRY



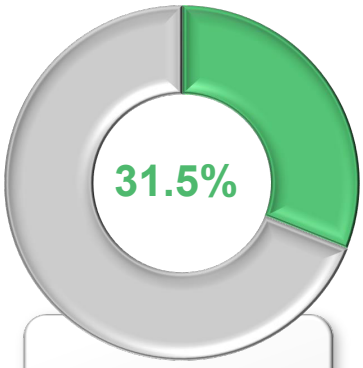
Still, they lack operational confidence: **24.7%** feel at high risk of tech-led disruption

RATE OF FEELING AT HIGH RISK OF TECH-LED DISRUPTION BY INDUSTRY

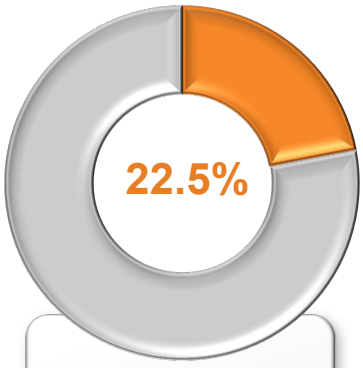


Healthcare organizations have a well-balanced approach to tech selection: Cost (**37.1%**), ease of adoption/ use (**36.0%**) and security vulnerabilities (**34.8%**) are their leading decision factors. **52.8%**: Share of healthcare organizations that claim experience in the healthcare industry/market is most important tech partner qualifier, their top selection criterion overall.

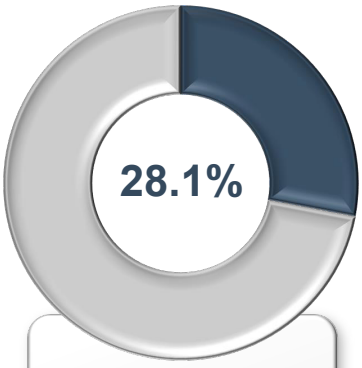
DISRUPTION READINESS



The share of healthcare organizations that selected both 'the capabilities of internal IT team' and 'lack of executive support' as the leading barriers to adapting to change, tying them for the top problems



Believe they are extremely agile in adapting to change, slightly below the average of **23.1%**



Will partner with technology innovators and startups to achieve disruption, and their top strategy to build new skills and capabilities will be to upskill/train existing workforces **(70.8%)**

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