

2016 Cloud Survey

Research and Analysis
conducted by

HiMSS Analytics

Study Purpose

HIMSS Analytics conducted a survey sponsored by **Level 3 Communications** to understand cloud usage, trends and preferred vendors as well as to update the cloud-based technology research previously conducted in 2014 through

- *A blinded*, Voice of Customer (VOC), web-based, *quantitative study*
- *Methodology*: Web based survey completed between 1/26 and 2/12 2016 by 105 IT decision makers at medium – large hospital systems and/or hospital corporate offices

Key Findings & Takeaways

The strategic benefits of cloud have trumped previous reservations and Healthcare organizations are ready to rapidly embrace cloud solutions.

Key Takeaways from our 2016 Healthcare Cloud Survey:

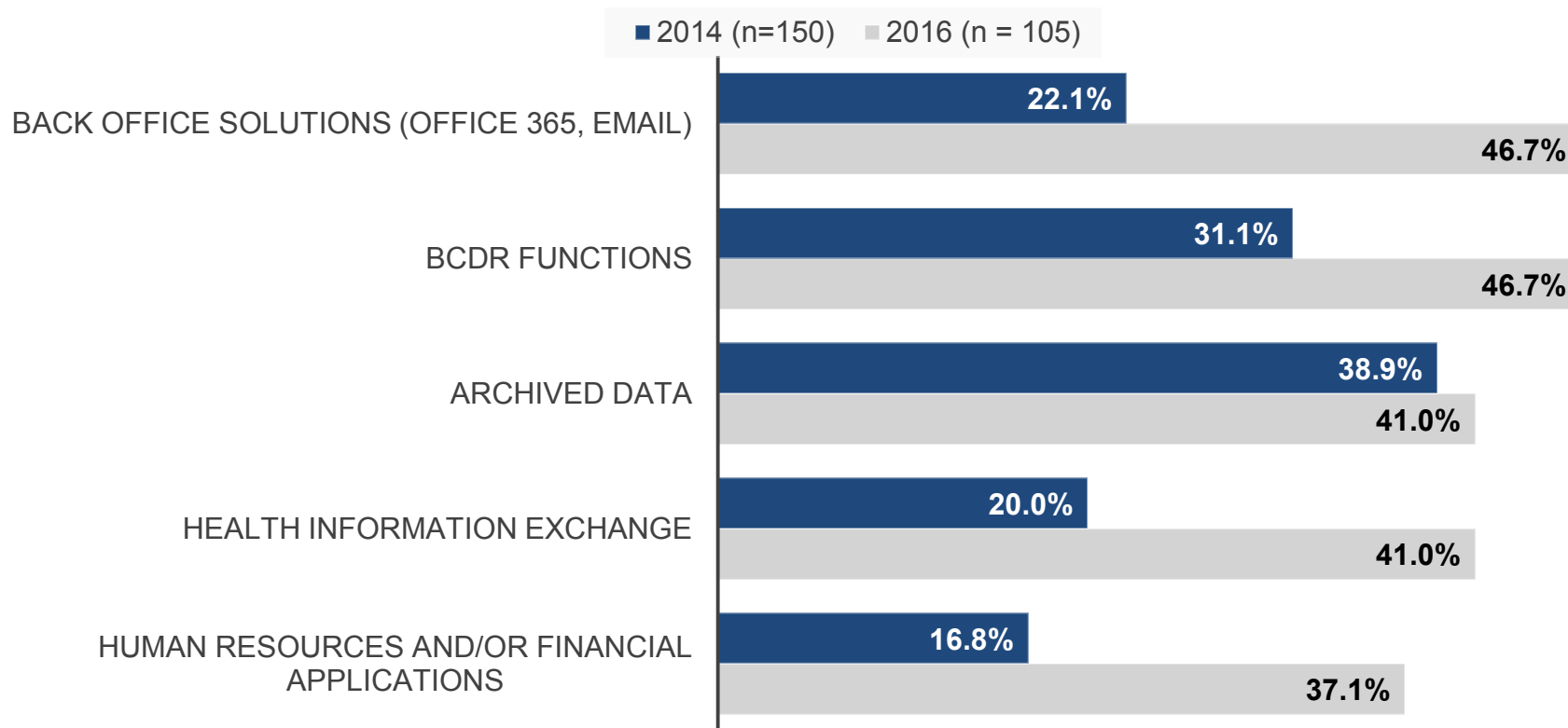
- The tipping point is here, planned usage of cloud for 5 key use cases increased 65% between 2014 and 2016¹ (slide 4)
- Organizations are aggressively using or planning to move to cloud to access compute cycles for big data analytics (59%), to host patient empowerment tools (73%) and to satisfy business requirements like PACS storage (55%); providers are leveraging cloud for PHI and non-PHI impacting applications (slide 5)
- Ten cloud adoption motivators ranked highly; cost efficiencies, robust disaster recovery solutions and the need for more scalable platforms came in at the top (slide 6)
- Organizations understand the important of secure, private cloud connectivity; 77% of respondents involve their network provider early on in strategy discussions (slide 7)
- Microsoft Azure, AWS & Google are all recognized as industry leaders for Cloud Services within healthcare (slide 8)

1. Based on current/planned usage for back office solutions, archived data, BCDR, health information exchange and HR/Financial applications between 2014 - 2016

BCDR and archived data continue to appear in the top planned areas for cloud usage

In 2016 Healthcare Providers are 65% more likely to plan to use cloud solutions for these 5 workloads

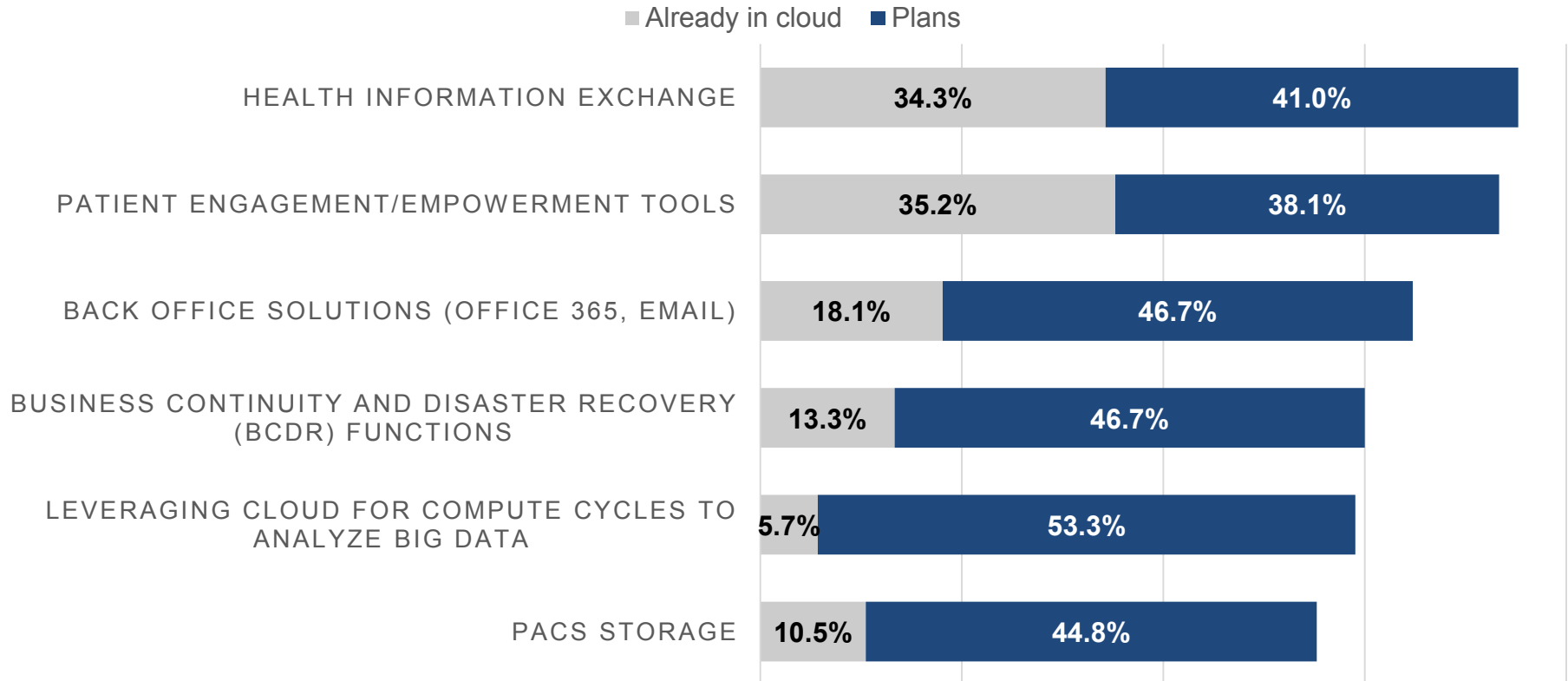
For each cloud-based type of technology, please indicate your current plans



Top 6 applications already migrated to the cloud

Healthcare organizations have already migrated several workloads to the cloud, indicating players will continue to leverage the cloud for PHI applications

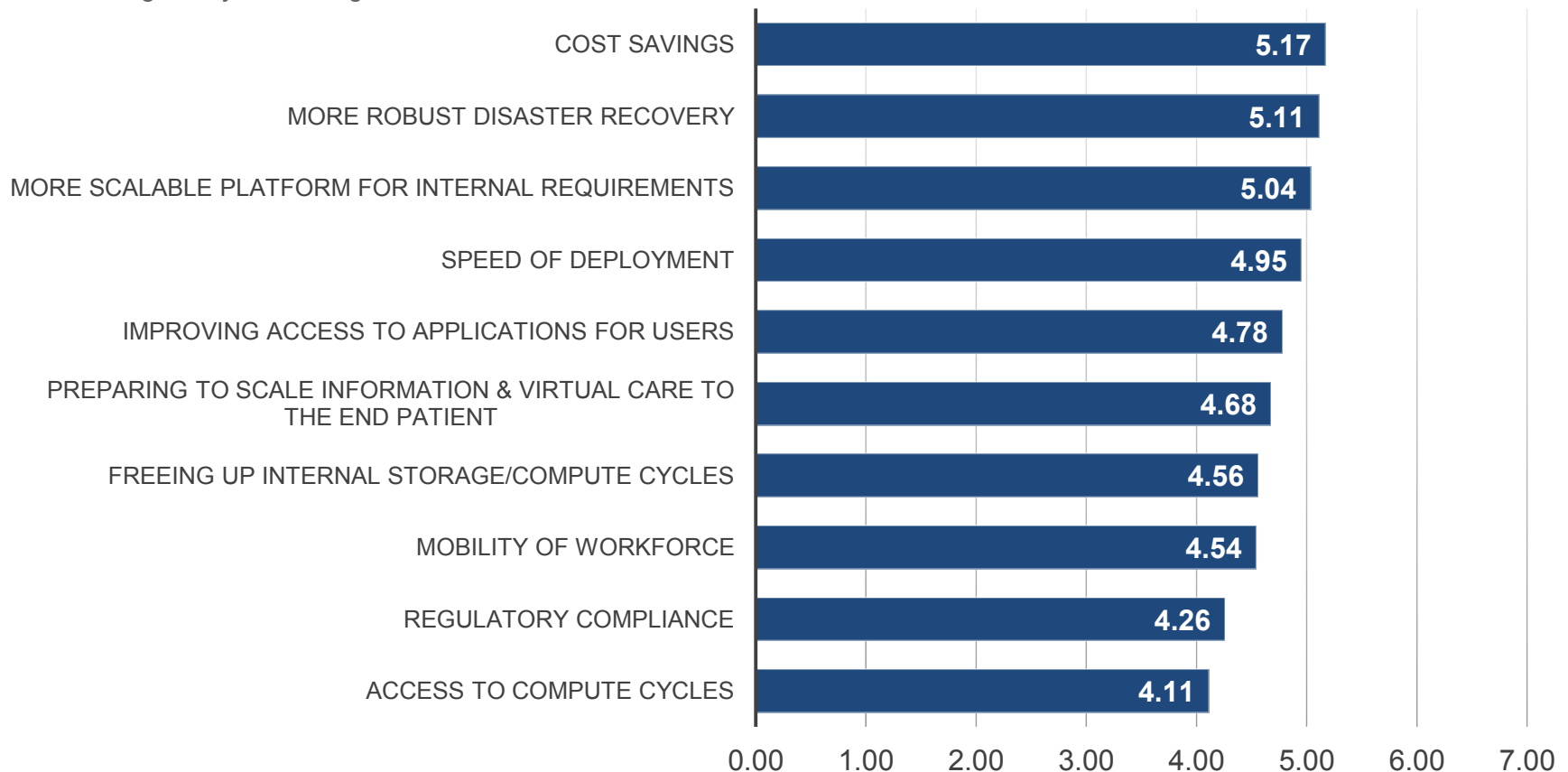
For each application, please indicate your current usage or plans to migrate to cloud-based solutions



Healthcare organizations state multiple 'strong' motivators for moving to the cloud

Cost savings, more robust disaster recover and scalability are top motivators to leverage the cloud

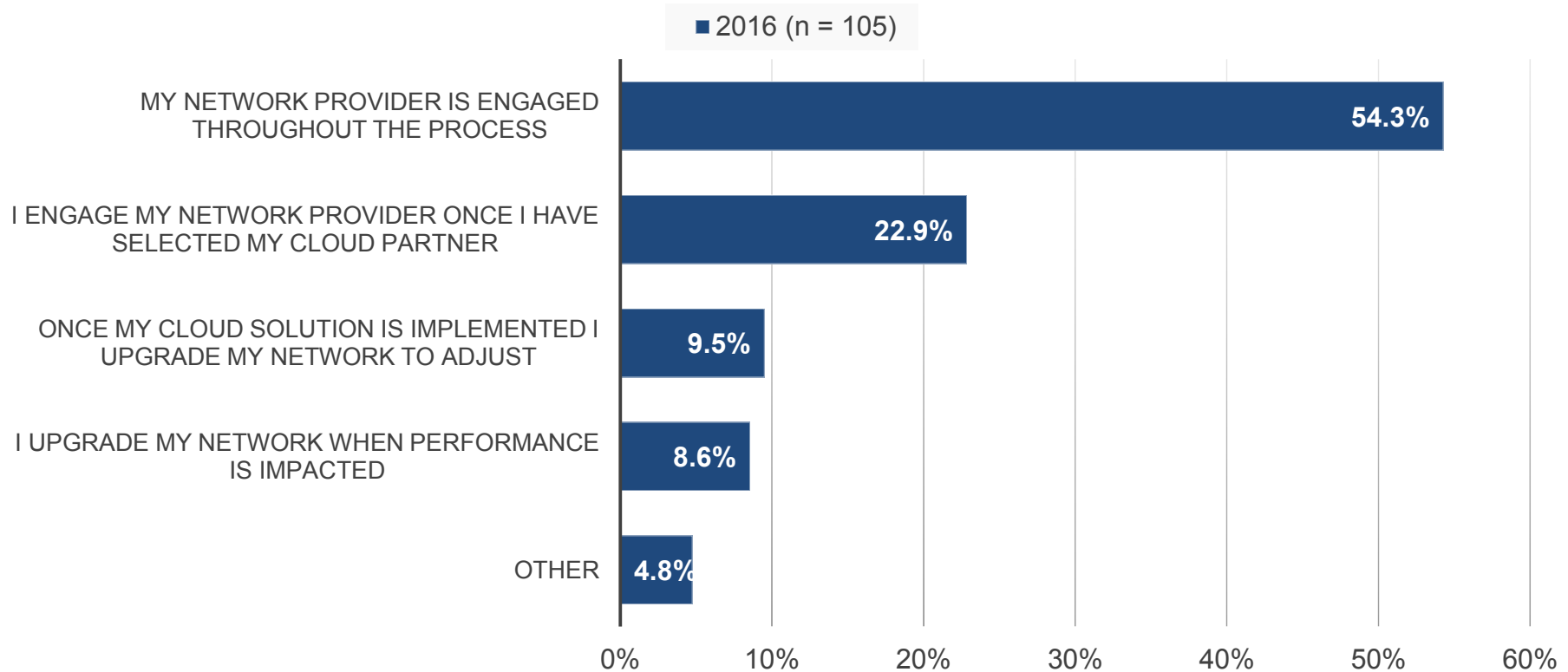
Please rate the following attributes regarding motivation for leveraging cloud technologies, with "1" being a non-motivating factor and "7" being a very motivating factor.



Network providers are playing a larger role in cloud strategy

Over 77% of respondents stated they involve their network provider early on in cloud strategy discussions

When deploying cloud solutions at what stage do you work with your network provider to ensure efficient connectivity?

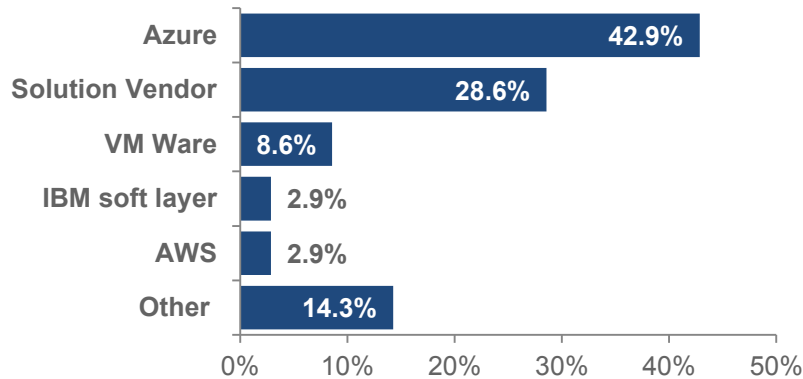


Multiple CSPs cited as top vendors across applications

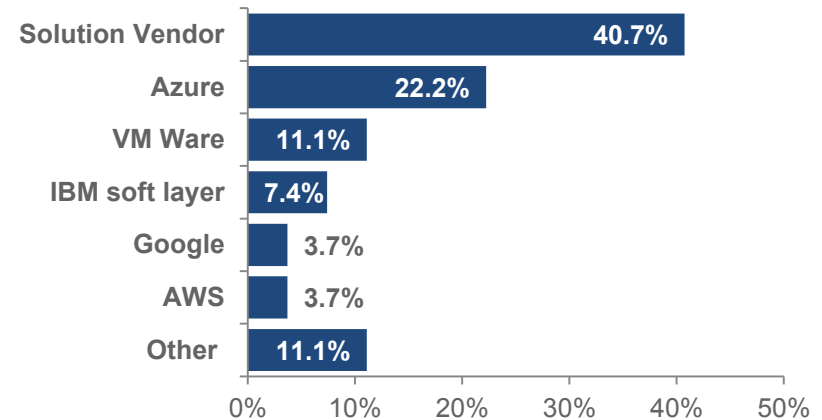
Microsoft Azure and SaaS solution vendors are perceived as strong vendors to satisfy various cloud application requirements

Which cloud vendor would you consider for the top 4 planned cloud technologies in 2016

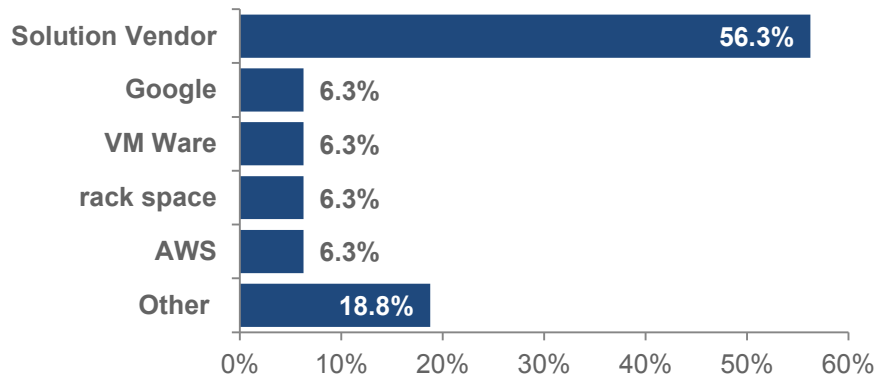
Back Office Solutions (Office 365, email)



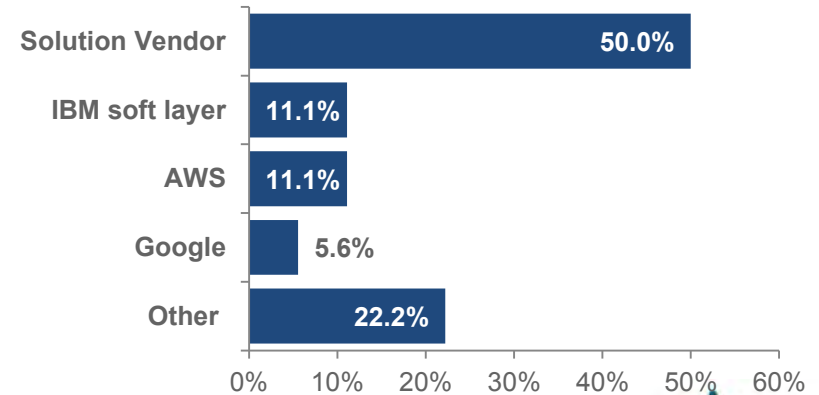
Business Continuity and Disaster Recovery



Revenue Cycle Management Tools



Patient Engagement/Empowerment Tools



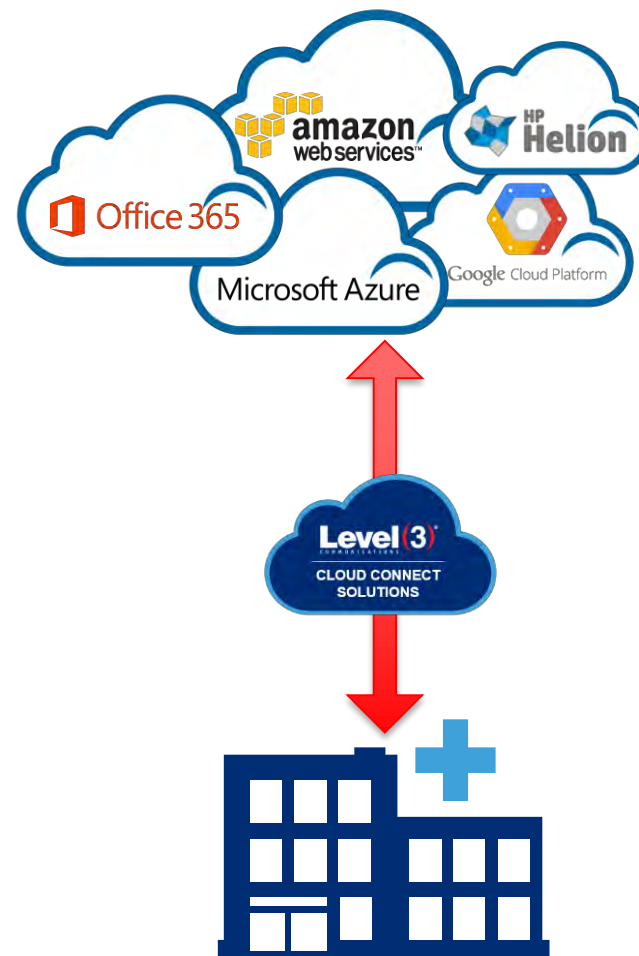
Level 3 Helps Healthcare Organizations Move to the Cloud

Why Healthcare leaders choose Level 3 Cloud Connect Solutions:

- Multiple connectivity options to connect to the industry leading cloud service providers
- Private, reliable connectivity to Azure, Office365, AWS, Google with proven SLAs
- Highly secure network with dual SOCs proactively monitoring and protecting infrastructure
- Consultative approach with industry experts to help organizations optimize their cloud strategy
- Level 3 is a market leader in cloud connectivity for Healthcare, [learn more here](#)

About Level 3 Communications

Level 3 deploys communications infrastructure to 2,500 healthcare organizations including delivering network solutions to 8 of the nation's 10 largest hospital systems and payer organizations. We provide secure, scalable and high performing cloud connectivity solutions.



Thank you!

Questions?