Trends & Insights in Ambulatory EHR
First Reaction Report

Research and Report Provided by Reaction
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- Individual vendor recommendation ratings for ambulatory EHRs. (Individual vendor C-sat recommendation scores will only be shared on an individual basis to those vendors with a ReactionData license.**)

- A deeper look at the relationship between EHR and practice management systems among inpatient facilities.

- Specific EHR vendors that are seriously “at risk” of being replaced and underlying reasons why.*

- Verbatim provider feedback** about specific vendors that are at risk of losing contracts.*

- A list of the healthcare facilities that participated in this research study.

*Because of the sensitive nature of individual vendor data, we withhold this information and disseminate it individually to the vendors in question.

**We do not disclose participant names or their healthcare facilities when sharing provider feedback.

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CONTENTS

Executive summary 4
Vendors covered in this report 5
Trends in ambulatory ehr market share and mindshare 6
  Market share and mindshare overall
  Market share and mindshare among hospital-owned ambulatory facilities
  Market share and mindshare among independent ambulatory facilities
  How do the hospital-owned and independent markets stack up?
Ambulatory ehr vendor recommendation scores 12
Top challenges providers face with their current ehr 14
The ambulatory ehr replacement and renewal market 15
  The replacement and renewal market overall
  The replacement and renewal market among hospital-owned and independent facilities
What vendors can do to save “at risk” contracts 17
Ambulatory providers without an ehr solution 18
Market share trends in ambulatory practice management systems 19
  Market share overall
  Market share among hospital-owned and independent facilities
  Ehr influence over practice management systems overall
  Ehr influence over practice management systems by facility size
Meaningful use stage 2 attestation 24
  Which ehr vendors make the best partners for attestation support?
Planning or undergoing a merger/acquisition 26
  Mergers and acquisitions by facility size
Conclusion 30
Why we release our research to the healthcare community? 31
Appendix A: Respondents by title 32
Appendix B: Respondents by facility size 33
Appendix C: Vendors with less than 5% of both market share and mindshare among our sample. 34
With ambulatory care accounting for roughly one-third of healthcare spending in the U.S. and rising, technology innovation and support from healthcare suppliers to providers continues to make this significant slice of the healthcare pie even more relevant than it already is. Patients are increasingly turning to outpatient care in standalone ambulatory facilities for procedures that have historically been performed as inpatient procedures. These standalone outpatient facilities are typically more cost effective and offer faster treatment times.

However, inpatient care is not the end game, but rather, a critical piece in the continuum of care. That said, the role of inpatient care is shifting to fill a more prominent place with 10,000’s ambulatory care facilities across the country and growing.

Provider organizations have caught the vision and are speeding up the development of new ambulatory facilities and the acquisition of existing facilities to ensure they have the balanced mix of care options patients have come to expect. From small facilities with just a handful of physicians to centers with hundreds of physicians and other care providers that operate on scale with many hospitals, ambulatory care is now fully integrated into healthcare today.

In addition to the growth in this market, inpatient facilities are also adapting. Single-focus surgical centers are giving way to new models such as multi-discipline centers, acting as quasi-hospitals--minus the overnight beds. The end result of this shift in the administration of care means greater efficiency, value and flexibility for patients.

What does all of this mean to vendors in this space...and specifically EHR vendors? The value of EHR contracts in ambulatory care facilities is multifaceted. For example, facilities owned by larger healthcare organizations are almost always given a limited number of approved vendors to choose from when selecting an IT solution. In addition, ambulatory centers in a given area can be influenced in their purchasing decisions by what local hospitals are using for services such as EHR. Lastly, because of the increased national focus to manage patient populations and improve care coordination, the larger EHR vendors are putting much more emphasis on capturing larger pieces of the ambulatory pie.

In this report we look at the ambulatory market overall, as well as in breakouts of two segments--hospital-owned and independent facilities.

Author: Chris Jensen
Co-author: Taylor Madsen
VENDORS COVERED IN THIS REPORT

- Allscripts™
- aprima™
- athenahealth
- Casamba
- Cerner
- digiChart
- eClinicalWorks
- Epic
- Evident
- GE Healthcare
- Greenway Health™
- Healthland®
- MEDITECH Medical Information Technology, Inc.
- McKesson
- NextGen
- WebPT®
- WRSHealth
TRENDS IN AMBULATORY EHR MARKET SHARE & MINDSHARE

MARKET SHARE & MINDSHARE OVERALL

Trends in market share and mind share, and the relationship between these two measurements are critical pieces of information providers and vendors in this space should closely monitor. Market share shows who owns what piece of ambulatory pie within our sample size, while mind share shows which vendors occupy the biggest space in the minds of providers that are adopting a solution for the first time or are considering a switch to a competing vendor. Think of it this way, market share is an indicator of “what is,” and mind share is an indicator of “what will be.”

For example, a combination of high market share but low mind share (by a significant margin) should sound off warning signals to any vendor, as this would indicate a shift is occurring away from their solutions. Conversely, a combination of lower market share and higher mind share indicates that recent measures a vendor is taking to improve their offering are taking hold and having a positive impact on prospective clients.

The ambulatory EHR market is defined in two markets—-independent facilities and hospital/healthcare organization owned facilities. The overall trends, as well as the two market segment trends show a very different narrative, which we will break down in this report.

**Note: Our market share measurement for this report is based on the sample size of 176 c-level, director and other management positions among providers from US-based ambulatory care facilities, which we collected via our RaaS (research as a service) platform in just a few days.**
With this backdrop, our data indicates that overall, Epic not only owns the largest piece of the ambulatory EHR market but is also positioned to capture a more significant share of the market in the future with a mindshare score registering higher than their market share. However, while Cerner registered a distant second in market share, they are making an equally impressive move and tied Epic for the highest percentage of mindshare among ambulatory providers. As has been the case in past years, Epic’s and Cerner’s aggressive positions will continue to gobble up pieces of the ambulatory pie currently occupied by vendors that have struggled to stay relevant in this space.
Allscripts edges out the rest of the competition for the third largest size of market share among our sample.

The other half of the market share and mindshare story and equally impressive is athenahealth’s and eClinicalWorks’ significant mindshare figures at approximately eight and five times their current market share in the overall ambulatory EHR market, respectively. This indicates these vendors are finding significant ways to positively connect with providers.

Considering these four standout mindshare numbers (Epic, Cerner, athenahealth and eClinicalWorks) together, which accounts for the vast majority of mindshare, all other vendors in this space must take corrective measures or face losing relevance among ambulatory providers. However, the analysis of the overall market share and mindshare figures does not take into account vendors that focus on the independent facility segment. Also worth noting, it is not uncommon for Epic to mandate healthcare organizations to eventually migrate all facilities over to their solutions. In addition, it makes sense for these larger organizations to adopt solutions under one vendor, which means, in addition to Epic, other vendors such as Cerner and athenahealth stand to gain significant ambulatory contracts almost by default when they win the battles for multi-facility organizations.
As expected, Epic and Cerner firmly control both the market share and mindshare among ambulatory facilities owned by larger healthcare organizations as they win contracts for larger facilities, and over time, convert other facilities under the same umbrella to their solutions. However, Meditech and Allscripts own more than 20% of the market among our sample, collectively. Despite this, both of these vendors should be concerned with mindshare numbers completely off the radar. What can these two vendors do to stay relevant in this segment?

Again, athenahealth registers a mindshare figure that can’t be ignored among hospital-owned ambulatory facilities. Look for their position in this space to change dramatically in the near future.

**MARKET SHARE & MINDSHARE AMONG HOSPITAL-OWNED AMBULATORY ORGANIZATIONS**

**EHR Market Share & Mindshare Among Hospital-owned Facilities**

**We display any vendor that represents 5% or more of either market share or mindshares. All other vendors mentioned by providers are listed in appendix C.**
MARKET SHARE & MINDSHARE AMONG INDEPENDENT AMBULATORY ORGANIZATIONS

The narrative changes significantly when we shift to the EHR market among independently-owned facilities. NextGen controls the largest piece of the market among the sample with Epic and Cerner taking second and third positions, respectively. With mindshare above 20% for both of these vendors, additional market share is sure to follow. This paints a fairly bleak picture for NextGen considering they occupy no space in the future plans of independent ambulatory providers. Change may be in the wind.

Just as significant is eClinicalWorks’ monstrous mindshare figure, occupying a space in one-third of the minds of independent providers. Look for their share of the independent EHR market to grow significantly in the near future.

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HOW DO HOSPITAL-OWNED AND INDEPENDENT MARKETS STACK UP?

This graph speaks for itself. Vendors that are balanced between both of these segments will be better insulated from change compared to competitors that are more heavily weighted to one side or the other.

**Market Share - Hospital-owned vs. Independent Care Facilities**

**We display any vendor that represents 5% or more of either market share or mindshares. All other vendors mentioned by providers are listed in appendix C.**
AMBULATORY EHR VENDOR RECOMMENDATION SCORES

How likely are providers in this space to recommend their EHR vendors to a colleague? This is the single most important question any company can ask their customers because it’s really an exercise in putting your reputation on the line. As displayed in the graph, the average score across all vendors covered in this report is 6.2. This places them in slightly positive territory. While this could be viewed as positive, it indicates that providers are typically not all that “in love” with their EHR vendors. There are two sides to this coin. Heads, don’t count on many rave reviews. Tails, no one is getting thrown under the bus.

Despite the lackluster average score, a couple of vendors received glowing endorsements from their providers scoring a 9.25 out of 10 and 8.00 out of 10. Any guesses who? you might be surprised. To put this in perspective, the low score is 4.46 out of 10.
INDIVIDUAL PROVIDER RECOMMENDATION SCORES

While we collect data on individual vendors that may be favorable or not, some information is sensitive enough that we don’t release it in a public format. However, below are the individual provider recommendation scores displayed anonymously. Vendors with a ReactionData license can contact us directly to obtain sensitive data such as c-sat and provider recommendation scores.

Anonymous Average Recommendation Score

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor #1</td>
<td>9.3</td>
</tr>
<tr>
<td>Vendor #2</td>
<td>8.0</td>
</tr>
<tr>
<td>Vendor #3</td>
<td>7.7</td>
</tr>
<tr>
<td>Vendor #4</td>
<td>6.5</td>
</tr>
<tr>
<td>Vendor #5</td>
<td>6.4</td>
</tr>
<tr>
<td>Vendor #6</td>
<td>6.0</td>
</tr>
<tr>
<td>Vendor #7</td>
<td>5.5</td>
</tr>
<tr>
<td>Vendor #8</td>
<td>5.5</td>
</tr>
<tr>
<td>Vendor #9</td>
<td>5.4</td>
</tr>
<tr>
<td>Vendor #10</td>
<td>5.0</td>
</tr>
<tr>
<td>Vendor #11</td>
<td>5.0</td>
</tr>
<tr>
<td>Vendor #12</td>
<td>4.8</td>
</tr>
<tr>
<td>Vendor #13</td>
<td>4.7</td>
</tr>
<tr>
<td>Vendor #14</td>
<td>4.5</td>
</tr>
<tr>
<td>Vendor #15</td>
<td>4.5</td>
</tr>
</tbody>
</table>

Attention Allscripts, Aprima, athenahealth, Cerner, CPSI/Evident, eClinicalWorks, Epic, GE Healthcare, Greenway, Healthland, McKesson, Meditech, NexTech, NextGen and Practice Partners, these are your scores. Contact Jeremy Bikman at jeremy.bikman@reactiondata.com to find out which one belongs to you!
TOP CHALLENGES PROVIDERS FACE WITH THEIR CURRENT EHR

What can we say here? Vendors that improve in these higher level areas will earn points (i.e. contracts and renewals) with providers.

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing functionality</td>
<td>55%</td>
</tr>
<tr>
<td>Usability</td>
<td>42%</td>
</tr>
<tr>
<td>Support for your strategic objectives</td>
<td>30%</td>
</tr>
<tr>
<td>Service</td>
<td>21%</td>
</tr>
<tr>
<td>Reliability/Uptime</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
<tr>
<td>None</td>
<td>14%</td>
</tr>
</tbody>
</table>
The ambulatory EHR market is relatively stable with only one in six providers seriously considering a switch to a new vendor. However, with a 15% churn rate, vendors that don’t find meaningful ways to differentiate themselves will continue to bleed out as more aggressive, customer-obsessed competitors continually look for ways to improve their message to the marketplace. Overlaying this data on the market share and mindshare figures can give a sense of not only who is most at risk, but also, a broad outlook of the rate at which these vendors might find their market share continue to erode.

Are you actively looking to replace your EHR?

- Yes: 15%
- No: 85%
THE REPLACEMENT & RENEWAL MARKET AMONG HOSPITAL-OWNED AND INDEPENDENT FACILITIES

Statistically, EHR vendors are doing a fine job retaining their clients both on the hospital-owned and independent sides of ambulatory care with the replacement rates for each segment essentially the same.
WHAT VENDORS CAN DO TO SAVE “AT RISK” CONTRACTS

Providers that indicated they were seriously considering a switch to a different EHR solution were asked what their current vendor could do to retain their contracts. To understand these data points, it’s important to know that providers were allowed to state multiple reasons why they are looking to replace their current vendor. This means the totals do not equal 100%. We chose this method for this question because providers often have multiple reasons why they are jumping ship.

Further analysis of the results displayed in the graph are unnecessary. Plain and simple, providers most often leave their vendors for these top reasons. Vendors that deliver in these areas will, more often than not, see renewals.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make it much easier to use</td>
<td>58%</td>
</tr>
<tr>
<td>Improve its reporting capabilities</td>
<td>47%</td>
</tr>
<tr>
<td>Provide a more robust platform</td>
<td>37%</td>
</tr>
<tr>
<td>Improve the practice management aspect of their integrated solution</td>
<td>37%</td>
</tr>
<tr>
<td>It doesn’t matter, we have to install the EHR our hospital uses</td>
<td>32%</td>
</tr>
<tr>
<td>Significantly improve their customer service</td>
<td>26%</td>
</tr>
<tr>
<td>Reduce the cost</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
</tr>
</tbody>
</table>
AMBULATORY PROVIDERS WITHOUT AN EHR SOLUTION

Roughly five percent of ambulatory care facilities do not yet have their go-forward EHR solution. However, this group is aware of the major disadvantage they face without this critical tool and in almost all cases, planning to adopt in the near term (most indicating 2016) and already have one or more vendors in mind. A natural question to ask is what are the demographics or traits these facilities have in common that contribute to the lack of adoption?

Our data shows they fall all over the board in terms of size (by number of physicians). We could not identify any other underlying factors. So, our conclusion is most ambulatory facilities that have not adopted EHR have very case-by-case reasons for being behind in this area—some are waiting to see what new changes the government is going to make, other providers are going to be retiring and see no need to spend the time, money, and effort to get an EHR, while others simply won’t do anything until a figurative gun is placed to their heads.

Is this a piece of business vendors should consider going after? If you’re a vendor just now asking this question, you’re probably late to the game to capture this sliver of the market.
MARKET SHARE TRENDS IN AMBULATORY PRACTICE MANAGEMENT SYSTEMS

MARKET SHARE OVERALL

EHR Market share and mindshare have become leading indicators for the direction of practice management system contracts in this space, as these two pieces of healthcare IT are becoming inseparable. So, it’s no wonder Epic, Allscripts and Cerner control the top three pieces of the PM system market. The most interesting insight with this data, however, is Allscripts second place market share position considering their modest mindshare among providers for EHR. Their significant presence in practice management is due to their acquisition history. As a result, they should be in a position to materially improve in the EHR market.

Practice Management System Market Share

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Epic</td>
<td>22%</td>
</tr>
<tr>
<td>Allscripts</td>
<td>16%</td>
</tr>
<tr>
<td>Cerner</td>
<td>13%</td>
</tr>
<tr>
<td>NextGen</td>
<td>8%</td>
</tr>
<tr>
<td>athenahealth</td>
<td>5%</td>
</tr>
<tr>
<td>MEDITECH</td>
<td>5%</td>
</tr>
<tr>
<td>GE Healthcare</td>
<td>4%</td>
</tr>
<tr>
<td>eClinicalWorks</td>
<td>4%</td>
</tr>
<tr>
<td>Greenway</td>
<td>3%</td>
</tr>
<tr>
<td>McKesson</td>
<td>3%</td>
</tr>
<tr>
<td>Aprima</td>
<td>3%</td>
</tr>
<tr>
<td>Evident (CPSI)</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Vendors that were not selected enough to be statistically significant but include: Origins, LSS, Acadia, Healthland, AdvancedMD, Medent, AMS, Office Practicum, Perfect Care Practice Management, Source Medical**
Allscripts’ market share dominance for practice management systems among independently-owned ambulatory facilities is further evidence that their success in this market has not been tied, as much, to larger hospital-owned EHR contracts. For good or bad, they’ve carved out a significant niche. However, as consolidation among healthcare facilities continues to occur, putting more independent facilities under the umbrella of larger organizations and with bigger pushes by Epic and Cerner to provide a more “one-stop-shop” experience even to smaller facilities, Allscripts may need to adapt their strategy or come under pressure.

As you can gather from this graph, Epic, Cerner and NextGen control the three largest positions in PM system contracts among hospital-owned ambulatory centers and Allscripts, Epic and Cerner are respectively first, second and third in market share among independent facilities.
EHR INFLUENCE OVER PRACTICE MANAGEMENT SYSTEMS OVERALL

With most of the market having decided that there are clear advantages to integrating EHR solutions and PM systems from the same vendor, three out of four clinics choose to standardize under one vendor. With the dog (EHR) wagging the tail (PM systems), the vendors that own the largest pieces of the EHR market will also own the bulk of the PM business, as well.

...but what about the 26% of providers still hanging on to a different PM systems?

We asked them about their plans for the future and almost half plan to make the switch. So what is the takeaway for PM systems? Vendors that focus on their EHR solutions, almost by default, will capture PM system contracts. But what do providers have to say about this? Please don’t take advantage of this gift by making PM systems an afterthought.
As if we need more evidence.

Of those providers that are considering a switch to a new EHR solution, 88% say they will replace their current PM systems with the solutions offered by their new EHR vendors.

**Will you replace your PM system at the same time?**

- 88%: Yes, we need our EHR and PM system to be from the same vendor.
- 12%: No, we like our PM system so we’re going to keep it.
EHR INFLUENCE OVER PRACTICE MANAGEMENT SYSTEMS BY FACILITY SIZE

Size doesn’t matter...at least when considering the influence EHR solutions have over PM system selected by providers in this space. By and large, providers like having their EHR solutions and PM system integrated under the same vendor and the size of the organization has little influence over this preference.

Is your EHR and practice management system with the same vendor?
Ambulatory organizations have made significant strides in stage 2 attestation with 90% complete or in the thick of attesting now. Only one in ten facilities were unable to attest or have no plans to do so. Of these facilities, almost half simply don’t have the proper model to receive enough benefits to bother attesting.

Were you able to successfully attest for meaningful use stage 2?

- Yes: 56%
- In the middle of it now: 34%
- No: 10%
WHICH VENDORS MAKE THE BEST PARTNERS FOR ATTESTATION SUPPORT?

How are EHR vendors in this space as true partners in supporting providers’ push to successfully attest for stage 2? From our market sample, Epic seems to have the most success, so far, in this area. With Cerner and Allscripts also making significant strides.

Were you able to attest for meaningful use stage 2?

---

![Survey Results Graph]

- **Epic**: 40% Yes, 30% In the middle of it now, 30% No
- **Cerner**: 30% Yes, 40% In the middle of it now, 30% No
- **Allscripts**: 20% Yes, 50% In the middle of it now, 30% No
- **MEDITECH**: 10% Yes, 50% In the middle of it now, 40% No
- **McKesson**: 20% Yes, 30% In the middle of it now, 50% No
- **NextGen**: 10% Yes, 50% In the middle of it now, 40% No
- **Evident (CPSI)**: 5% Yes, 60% In the middle of it now, 35% No
- **athenahealth**: 5% Yes, 65% In the middle of it now, 30% No
- **eClinicalWorks**: 10% Yes, 50% In the middle of it now, 40% No
- **Greenway**: 5% Yes, 50% In the middle of it now, 45% No
- **Healthland**: 5% Yes, 55% In the middle of it now, 40% No
- **Aprima**: 5% Yes, 60% In the middle of it now, 35% No
- **NexTech**: 5% Yes, 65% In the middle of it now, 30% No
- **Practice Partners (McKesson)**: 20% Yes, 40% In the middle of it now, 40% No
- **GE Healthcare**: 5% Yes, 60% In the middle of it now, 35% No
Close to one in four clinics have plans to acquire, merge with or be acquired by another facility or IDN but where is the most play in this market? Looking at merger/acquisition (M&A) trends by facility size provides more insights.

Is your organization currently planning or undergoing a merger/acquisition?

- Yes: 77%
- Not currently, but we may have to in the future: 13%
- No: 10%
Is your organization currently planning or undergoing a merger/acquisition?

In a previous study and we conducted on the community hospital EHR market regarding M&A's we found similar trends. The following graphs are from that report, titled Community Hospital EHR | 2015.
Community Hospitals M&A Plans

Again, we see a similar trend among smaller healthcare facilities such as ambulatory care centers and community hospitals--the larger the facility, the greater the likelihood they are currently being acquired or may have to be acquired in the future.
...on a more serious note regarding healthcare M&A's.
CONCLUSION

Like many other segments of healthcare, ambulatory care is growing and adapting at a very fast pace. By and large, this is positive for patients but comes with growing pains at the expense of providers.

We were happy to see the widespread adoption of EHRs and successful attestation of Meaningful Use Stage 2 among these facilities. These are good indicators ambulatory care is ready for primetime, with significant demand among patients and growing. On the supplier side, vendors are stepping up their games to provide integrated solutions such as EHR and practice management systems. Will the day come that inpatient care will actually take a “backseat” to outpatient care? For now, no, but time will tell.
WHY WE RELEASE OUR RESEARCH TO THE HEALTHCARE COMMUNITY

Does your organization budget money each year for market research initiatives, reports or tools that typically provide little or no ROI? Unfortunately, the market research industry has operated for so long on very outdated and flawed methodologies that businesses rarely use the terms “market research” and “ROI” in the same sentence. We’re on a “mission of mercy” to show what effective business research should look like and our free industry reports are the wakeup call.

Businesses today are sandwiched between handing control of research projects to slow, outdated firms or conducting their own research through the use of survey tools. Both options are recipes for underwhelming performance and depressingly low expectations. So why do organizations keep conducting business research? Because getting intel is that important. You’ve heard the saying, “Some data is better than no data?”

With that, we give you Reaction, the world’s first Research as a Service (RaaS) platform designed for use within your business. That’s right, we are not a market research firm and please don’t ever call us one. At its core, we designed Reaction to make ROI the focus of all business research you conduct with your customers, prospective customers or the market at large. Because of our user network of more than 250,000 healthcare providers and our methodology of best practices, Reaction is blazing fast, elicits an incredible response from any healthcare provider audience and creates direct opportunities to generate new business…some people call that lead generation.

When we let Reaction out of its cage, we couldn’t let our clients have all the fun. So, we use Reaction to gather super salient data in days, not months on a host of healthcare topics to show the market what business research should look like. The takeaway? Demand much more from your market research budget. To find more contact Jeremy Bikman at jeremy.bikman@reactiondata.com or visit us at www.reactiondata.com.
APPENDIX A: RESPONDENTS BY TITLE

Respondents by title

- Operational Head: 53%
- Clinical Head: 47%
APPENDIX B: RESPONDENTS BY FACILITY SIZE

Respondents by facility size

- 1-5 physicians
- 6-15 physicians
- 16-25 physicians
- 26-50 physicians
- 51-100 physicians
- 100+ physicians
APPENDIX C: OTHER VENDORS THAT SHOWED UP WITH LESS THAN 5% IN BOTH MARKET AND MIND SHARE AMONG EHR AND PM SYSTEM SOLUTIONS.

EHR VENDORS MENTIONED

AdvancedMD
Allegiance
Amazing Charts
AMS
APTA Connect
Chart Links
ChartMaker
Elektra
e-MDS
Exscribe
Fuji RIS
Healthland
Home Built Vista
Iknow Med
Medent
MEDITAB
Office Practicum
QuadraMed
Quick EMR
SIS
Source Medical
SRS Soft
UroChart

PRACTICE MANAGEMENT VENDORS MENTIONED

Acadia
AdvancedMD
AMS
Healthland
LSS
Medent
Office Practicum
Origins
Paper
Perfect Care
Source Medical