

Digital Health NOW

Fact Sheet

2014 Subscription Package



Digital Health NOW

Prospectus

Introduction

21st century healthcare delivery means access to the right information by the appropriate service provider in the ideal setting of care.

In the past, government focus on system improvements has been on the hospital acute care segment. About 70% of the current budgetary spend on ICT happens in the acute care segment, which accounts for only 30% of all patient care. The physicians and primary care, community and home care, and other segments of the healthcare spectrum account for 70% of patients but only 30% of all ICT spend.

However, there is growing realization that building a sustainable and effective care delivery model requires the seamless integration across the continuum of care beginning with primary care physician offices with multidisciplinary service models, through to the hospitals and continuing care facilities, and into the home care and community care settings.

As Canada's health system transitions to an integrated model of care delivery, Branham's focus is expanding as well to include the primary, acute, continuing and home care market segments. **Branham Group Inc. is the definitive source for digital health information and analysis on the continuum of care in the Canadian healthcare market.**

Digital Health harnesses the transformational power of modern information and communication technologies for improving health and healthcare throughout the world. Information is the lifeblood of health and healthcare. In caring for individual patients, managing healthcare systems, controlling and preventing non-communicable diseases (NCDs) or other epidemic illness, or conducting cutting-edge clinical research, we are only as good as the information we have about the health and healthcare of individuals and populations. Digital health releases the power of health-related data by applying the most advanced information and communication technologies to the collection, sharing and use of information that can improve health and healthcare.

- World Economic Forum,
Global Agenda Councils 2012-13

Branham Group defines Digital Health as all communication, including generation and transmission of data from humans to machines, machines to machines, and machines to humans across the entire Continuum of Care.

While the healthcare market has been slow to adopt change, the adoption rate of information and communication technology (ICT) has not only multiplied manifold but adoption is now taking place at all levels of the healthcare sector. ICT is being lauded as an enabler of the change that must occur if we are to have a sustainable and robust health system.

The Branham *Digital Health NOW* Subscription Package provides unbiased information and analysis of trends in healthcare ICT. The primary objective of this package is to provide in-depth analysis on the current state of healthcare ICT deployment in Canadian healthcare organizations.

The *Digital Health NOW* service goes beyond the earlier Branham eHealth in Canada reports by expanding coverage to the full continuum of care, thus enabling the reader to keep a finger on the pulse of the healthcare ICT marketplace with concise, immediate, and relevant reports.

Scope and Objectives

Digital Health NOW Monthly newsletters and the detailed bi-monthly *Digital Health NOW Spotlight* reports are invaluable in identifying sales and marketing opportunities throughout Canada. The bi-monthly reports identify the key players in the various market segments as well as provide comprehensive information to enhance understanding of relevant focus areas.

- » For executive management, the *Digital Health NOW* subscription service provides a thorough understanding from a healthcare and technology perspective on the key issues and trends in this dynamic market.
- » For sales organizations, Digital Health NOW helps identify sales opportunities and builds solid business cases for prospective customers.

- » For marketing personnel, Digital Health NOW allows marketing activities to be more targeted to the latest trends in the healthcare market.
- » For government agencies and non-profit agencies with a focus on health, Digital Health NOW ensures a comprehensive understanding of the dynamic and complex health systems for effective policy and program development.

Keeping abreast of this dynamic market is critical to your organization's success. Digital Health NOW is your trusted information source for the healthcare ICT market.

Target Buyers

The Branham Digital Health NOW Subscription Package offers information and analysis of value to any organization selling into, developing policies for, or tracking the evolution of the Canadian healthcare ICT market. The intended audiences include:

- » Vendors offering ICT-based products and services to healthcare organizations,
- » Vendors considering an entry into the Canadian healthcare ICT market,
- » Government departments and /or agencies,
- » Regional Health Authorities,
- » Industry associations and non-profit organizations with responsibility for, or an interest in, the Canadian healthcare ICT market,
- » Economic development agencies, and
- » Buyers of healthcare ICT products and services.

Deliverables

Digital Health NOW Monthly Reports

The total Canadian Healthcare market includes 14 different geographic markets (or health jurisdictions) – 10 provinces, 3 territories and 1 federal region. The Monthly Reports provide a comprehensive review of these markets. These timely reports update subscribers on current and projected deployment in healthcare technology, healthcare and eHealth policy development, regional and local procurement activities and processes, market size and trends, key vendors, and much more. Each monthly report is dedicated to a health jurisdiction providing a comprehensive overview of the current and recent activities, issues and opportunities

in that area. Each report also includes a brief overview of important happenings in other jurisdictions, ensuring a Canada-wide focus at all times.

Reports are released according to the following timeline:

- » December – Atlantic Canada
- » January – Manitoba
- » February – New Brunswick
- » March – Alberta
- » April – Saskatchewan
- » May – Ontario
- » June – Quebec
- » July – British Columbia
- » August – Canadian Territories
- » September – EHR Status Report
- » October – International Healthcare ICT Markets
- » November – National Roll-Up / A Year in Review

Each report captures the latest updates in the following areas across the continuum of care:

- » Provincial Health System Overview,
- » Budgets (Overall healthcare services delivery budget and healthcare ICT budget),
- » Healthcare Services Delivery Overview: acute care, primary care, continuing care, community care, emergency health, cancer care, mental health and First Nations health,
- » Installed base, deployment, and procurements by sector,
- » State of provincial EHR IT systems,
- » State of regional and Ministry of Health IT systems,
- » Province-wide activities and initiatives, and
- » Plans & Priorities.

In addition to providing updates on the aforementioned spaces in Canadian healthcare, Branham also conducts continuing research into key areas such as First Nations Health, Health Human Resources, Health Informatics, Telehealth, Departmental Systems, Advanced Clinical Systems, and Health Information Systems.

Digital Health NOW Spotlight Bi-Monthly Reports

These reports contain detailed topical snapshots of intriguing areas of healthcare ICT in Canada. These reports are a primer to help understand the importance of various verticals from a health system perspective. Furthermore, these reports provide a thorough overview of the information technology

solutions for various areas of healthcare, and an evaluation of the solutions and leading vendors in these spaces.

In the 2013-14 Season, the following topical reports will be published:

- » **Continuum of Care: The ICT Imperative (An Update)** - The Continuum of Care is a concept involving an integrated system of care that guides and tracks patient over time through a comprehensive array of health services spanning all levels of intensity of care. This report will present a definition of continuum of care, including basic components, levels of health care, where we are today, and the challenges in achieving an integrated continuum of care. Further, the report details how technology can be a major driver in the achievement of a fully integrated Continuum of Care.
- » **Key Enabling Technologies in the Evolution of Health Care: Mobility, Cloud and Data Mining** - The Digital Health market is evolving rapidly. This evolution, in part, is being driven by the growing use of some key enabling technologies: local and wide area wireless networking and mobile applications; cloud solutions; and big data mining. This report will provide an overview of these technologies and their applications in the health care sector, the benefits that accrue from using them, and the challenges experienced along the adoption curve.
- » **Vendor Landscape** – The health IT vendor landscape in Canada is evolving rapidly, with several large multinationals and niche local players in the fray. This report will include a list of who's who, what area of the health IT space they play in, and a ranking of the Top 25 vendors doing business in Canada.
- » **Buyer Landscape** – A very important aspect of the health IT market is the buyers. Who's buying the solutions? How much are they spending? What are their purchase criteria? This report will look at the Top 50 health IT buyer organizations in Canada and attempt to provide some commentary around their perceptions and purchase intentions.

Thought Leadership ThinkTank

Branham will organize a thought leadership forum in the Greater Toronto Area (GTA) in March 2014 to facilitate exchange of thoughts and opinion, and generate ideas on how to tackle the **"Financial Challenges in Canadian Health Care IT"**. The attendees will include leading figures

in Canadian health care, including ministers, bureaucrats, CEOs and CIOs of hospitals, health IT vendors, and consulting groups. Digital Health NOW subscribers will receive one free access pass to the event, which will also be open to the general public.

Chat Branham

As part of the subscription package, subscribers have the opportunity to engage in one-on-one Q&A with a Branham Digital Health analyst to gain an objective and enlightened perspective on a particular topic area, or to help find answers to a market-related issue within hours.

Monthly In-Touch Calls

The Branham Digital Health NOW subscription package includes a once monthly conference call with a Branham Research Analyst and senior market leaders to discuss healthcare ICT current affairs and opportunities.

Corporate Strategy Review Sessions

In a highly competitive Digital Health market it is imperative to hit the market at the right time with the right offering. While the Digital Health NOW reports will ensure that subscribers remain knowledgeable about the latest industry trends, Branham's also offers on-site Corporate Strategy Review Sessions, which are geared to provide subscribers the opportunity to preview their strategy with a leading industry expert.

About Branham

Based in Ottawa, Canada, Branham Group Inc. is a leading industry analyst and strategic consulting company servicing the global information and communication technology marketplace. Branham Group assists IT companies and related institutions in achieving market success through its customized planning, marketing and partnering services as well as through its sector specific multi-client study efforts.

For any questions relating to this prospectus or Branham Group in general please contact **Ted Dhillon at 613-745-2282 ext. 121**.