2013 Instrumentation Survey Report

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Economic pressures coupled with a concerted effort to cut costs are critical factors in determining how hospitals will approach the purchase of surgical instruments in the coming year.

According to a recent survey, the average annual surgical spend at the facility of a Surgical Products reader will be about $175,000 this year. About 19 percent of respondents stated that their facility spends in excess of $250,000, and almost half (46 percent) indicated their facility will spend about the same amount as they have previously on instrumentation over the next 12 to 18 months. About 73 percent said spending will either increase or stay the same.

A little more than one-third of those surveyed suggested orthopedic instruments will be the target of increased investment among various product categories. Robotic surgery, endoscopic instruments, endoscopic accessories, and laparoscopic instruments are also categories in which readers anticipate the largest increase in future instrument spending over the next couple of years.

However, laparoscopic instruments are more of an immediate need. A whopping 71 percent of survey respondents indicated their facilities will be looking to make an investment in that area over the next 12 to 18 months. Meanwhile, lighting is a category in which respondents anticipate the largest decrease in spending in the not-so-distant future.
When it comes to what instrumentation products are wanted and needed in facilities, here are the top ten, based on survey results:

- Laparoscopic Instruments
- Endoscopic Instruments and Accessories
- Orthopedic Instruments
- Arthroscopes
- Instrument Sterilization/Cleaning
- Holding and Positioning Products
- Robotic Surgery
- Staplers
- Single Port/Single Incision Surgery Devices
- Bariatrics

There are a number of key factors that will ultimately impact purchasing decisions. Cost-cutting and the economy were the two leading responses, as is the need to invest in more capital equipment and instrument price increases. Based on the responses, cost is almost always a critical factor in driving purchasing decisions related to instrumentation.

When purchases are made, the following were cited as the most important criteria by Surgical Products readers:

- Reputation/brand name was the most important factor for the second straight year. About 23 percent of the respondents selected this as their top choice.
- Both cost and warranty were selected by 19 percent of respondents.
- Relationships with the supplier/distributor was the choice of a little more than 17 percent of respondents.
- Sole source contract and physician need were also mentioned.

As previously stated, respondents strongly agreed that orthopedic instruments will be the product category that will see increased investment in the coming years. In fact, no other response came anywhere close to drawing the same level of agreement among Surgical Products readers. Consider the top five responses:

- Orthopedic Instruments (34.7 percent)
- Robotic Surgery (16.3)
- Laparoscopic Instruments and Endoscopic Instruments & Accessories (12.2)
- Bariatrics and Tagging/Tracking Systems (4.1)

The results of this year's instrumentation purchasing survey are very much in line with those from a year ago. The desire to purchase and use more endoscopic and laparoscopic instruments reflect the increased prevalence of minimally-invasive procedures as hospitals try to improve surgical outcomes, become more efficient, and reduce costs associated with longer recovery periods and hospital stays.

The need for more orthopedic and arthroscopic instrumentation reflects the growing population of aging and elderly patients in the United States. Because of this, there is a higher demand for surgical procedures to address quality-of-life issues and improve health and mobility.

While the results of this survey only touch on one aspect of a hospital facility's purchasing behaviors and attitudes, they do serve to highlight a number of interesting trends related to equipment needs in today's operating room.

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