2014 Instrumentation Survey

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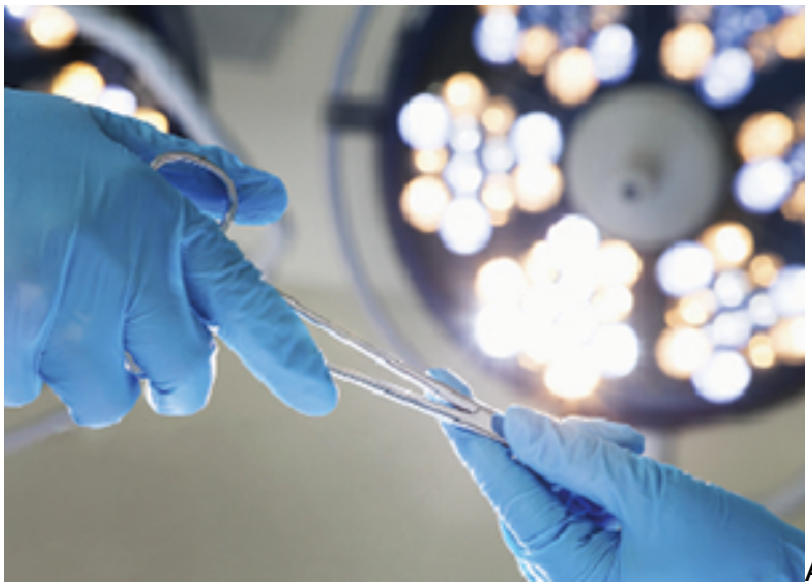

A conservative attitude toward investment and lingering concerns about the short-term financial state of the healthcare industry will most likely define how hospitals approach the purchase of surgical instruments in 2014 and 2015.

According to a recent survey, the average amount spent on surgical instrumentation at the facility of *Surgical Products* reader this year will be somewhere between $150,000 and $175,000. About 25 percent of respondents indicated their facility expects to spend more than $250,000, while about half (51 percent) anticipate their facility will invest about the same amount of money over the next 12 to 18 months as they have in the recent past. In addition, almost the exact percentage of respondents (73 percent) as those surveyed a year ago reported spending will either increase or stay the same.

The results of the survey find many facilities are planning to invest in orthopedic and laparoscopic instruments over the course of the next 12-18 months. Fifty-five percent of respondents indicated their facilities are looking to spend on orthopedic instruments, while 53 percent of respondents suggested their facilities are interested in purchasing laparoscopic instruments. No other instrumentation product category registered higher than 46 percent (endoscopic instruments and accessories). A year ago, a whopping 71 percent of respondents indicated that they anticipated increase in future instrument spending over the next couple of years. In addition to laparoscopic instruments, orthopedic instruments, and endoscopic instrumentsand accessories, the following categories are also targets for investment by facilities throughout the U.S. during the next year or two: holding and positioning products (37 percent), arthroscopes (34 percent), lights (31 percent), and electrosurgery (28 percent).

When it comes to what instrumentation products are wanted and needed in facilities, here are the top ten, based on survey results:

- Orthopedic instruments
- Laparoscopic instruments
- Endoscopic instruments and accessories
- Holding and positioning products
- Arthroscopes
- Lights
- Electrosurgery
- Staplers
- Instrument sterilization/cleaning
- Robotic surgery

Respondents did weigh in on the factors that they expect to impact their facility's instrumentation purchasing behaviors during the next 12 months. According to the results, cost cutting and the economy were far and away top choices of those surveyed for the second consecutive year.

When facilities do decide to invest, the following criteria were cited as the most important by readers of *Surgical Products*:

- Reputation/brand name was deemed most important factor for the third straight year. About 30 percent of survey respondents selected this as their top choice.
- Cost was selected by about 26 percent of respondents.
- Relationships with the supplier/distributor was the choice of a little more than 13 percent of respondents. More than 17 percent of respondents deemed this the most important factor in last year.
- Quality and performance were also mentioned by multiple respondents.

For the third consecutive year, *Surgical Products* readers who were surveyed strongly suggested they believed 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 respondents. Consider the top five responses:

- Orthopedic Instruments (31 percent in 2014; 34 percent in 2013)
- Laparoscopic Instruments (16 percent in 2014; 12 percent in 2013)
- Robotic Surgery (11 percent in 2014, 16 percent in 2013)
- Endoscopic Instruments & Accessories (10 percent in 2014; 12 percent in 2013)
- Tagging/Tracking Systems (3 percent in 2014; 4 percent in 2013)

While the results of the 2014 Surgical Products instrumentation purchasing survey are similar to those of years past, it should be noted that the average surgical spend for this year is down slightly from years past. Factors such as cost concerns and economic worries are causing facilities to temper their desire to invest in more instrumentation, despite their belief that the need is there for more orthopedic, laparoscopic, and endoscopic instruments. Practicing medicine and performing surgery in a post-Affordable Care Act healthcare landscape no doubt contributed to respondents' feedback about instrumentation.

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