

Healthcare Workforce Management Systems Market by Solution (Talent Management, Time & Attendance, Scheduling, Optimization Services), by Mode of Delivery (Cloud-based, Web-based), by End-User (Hospital, Long Term Care) - Global Forecast to 2019

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Abstracts

The global healthcare workforce management systems market is expected to grow at a double digit CAGR during the forecast period of 2014 to 2019 and is estimated to be worth \$1,453.8 million by 2019. The market is mainly driven by the growing need of healthcare professionals due to the increasing aging population and resultant increase in the prevalence of diseases in North America and Europe, technological innovations, and the implementation of stringent regulations. However, data security risk and high cost of software upgradation and maintenance inhibit the growth of the market to a certain extent.

During the forecast period, the time and attendance software segment will continue to drive and dominate the healthcare workforce management systems market. The large share of the time and attendance software segment can be attributed to its wide usage in the workforce management market. By 2019, North America will continue to drive and dominate the healthcare workforce management systems market, primarily due to the increasing demand of healthcare professionals. Majority of the growth in the Asia-Pacific region is primarily driven by the growing healthcare infrastructure in this region.

In this report, the global healthcare workforce management systems market is segmented based on solution (software and services), mode of delivery, end user, and geography. Based on solution, the healthcare workforce management systems market is divided into software and services. The software market is further divided into standalone software and integrated software. The standalone software market is divided

into time and attendance, scheduling, HR and payroll, talent management, analytics, and others. The services market covers variety of services related to the workforce management software including implementation, support and maintenance, optimization, and education/training services.

Based on the mode of delivery, the market is segmented as on-premise solutions, web-based solutions, and cloud-based solutions. This report also discusses the key market drivers, restraints, and opportunities in the global healthcare workforce management systems market and its submarkets.

Some of the major players in the global healthcare workforce management systems market include IBM Corporation (U.S.), Infor, Inc. (U.S.), Oracle Corporation (U.S.), Kronos, Inc. (U.S.), SAP AG (Germany), McKesson Corporation (U.S.), and Automatic Data Processing, Inc. (U.S.). Collectively, the top two players accounted for nearly 75% of the global healthcare workforce management systems market in 2013.

Kronos (U.S.) and Infor, Inc. (U.S.) are the leading players in the market which together accounted for a share of around 45% to 50% in 2013. Kronos is a prominent player with a strong brand image in the growing healthcare workforce management systems market. Kronos has a strong presence in the U.S. and is strengthening its presence through expansions in the European and Asian markets. It focuses on strengthening and streamlining its product portfolio for the healthcare workforce management systems market.

Reasons to Buy the Report

The report will enrich both established firms as well as new entrants/smaller firms to gauge the pulse of the market, which in turn would help the firms garner a greater market share. Firms purchasing this report could use any one or a combination of the below mentioned five strategies (market penetration, product development/innovation, market development, market diversification, and competitive assessment) for reaping a greater market share.

This report provides insights on the following pointers:

Market Penetration: Comprehensive information on product portfolios offered by the top players in the healthcare workforce management systems market. The report analyzes the healthcare workforce management systems market by solution, mode of delivery, and end user across North America, Europe, APAC,

and RoW regions.

Product Development/Innovation: Detailed insights on the upcoming trends, research and development activities, and new product launches in the healthcare workforce management systems market

Market Development: Comprehensive information on the lucrative emerging markets by solution, mode of delivery, end user, and geography

Market Diversification: Exhaustive information of new products, growing regions, recent developments, and investments in the healthcare workforce management systems market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, distribution networks, manufacturing capabilities, and SWOT analyses of the leading players in the healthcare workforce management market.

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About

Healthcare workforce management systems encompass all the solutions needed to manage and maintain the productive workforce in a healthcare organization. Workforce management includes HR administration, career and succession planning, adherence to work schedule, talent acquisition, workforce tracking, payroll and benefits, and leave management. Over the last decade, there has been a drastic change in the healthcare services industry which had a positive impact on the overall growth of the healthcare workforce management systems market. The market has witnessed the introduction of new and innovative solutions to efficiently manage healthcare workforce without compliance risks.

In this report, the global healthcare workforce management systems market is segmented on the basis of solutions, modes of delivery, end users, and geography. Based on solutions, the healthcare workforce management systems market is divided into software and services. The software market is further divided into standalone software and integrated software. The standalone software market is divided into time and attendance, scheduling, HR and payroll, talent management, analytics, and other software. The services market includes implementation and delivery services, support and maintenance services, optimization services, and education/training services. Based on the mode of delivery, this market is divided into on-premise, web-based, and cloud-based. This report also discusses the key market drivers, restraints, and opportunities in the global healthcare workforce management systems market and its submarkets. Based on end users, the market is divided into hospitals, nursing homes, assisted living centers, long-term care facilities, and other healthcare institutions such as rehabilitation centers and pharmacies.

In addition to the structural market drivers, there are strong geographic drivers as well for the growth of the healthcare workforce management systems market. Owing to the presence of a number of large hospitals and greater penetration of healthcare IT solutions in the industry, the U.S. is the largest revenue contributor to the global workforce management systems market. This market is further expected to grow at a CAGR of XX% during the forecast period, due to the increasing adoption of healthcare IT solutions among the smaller healthcare organizations in the country. The need to optimize healthcare resource utilization amidst the shortage of healthcare workforce in the country is further expected to boost the growth of the healthcare workforce systems market in the U.S.

On the other hand, the market growth in emerging economies across APAC and Latin America is largely driven by government initiatives towards modernization of their respective healthcare infrastructure. Growing awareness for healthcare services and growing patient population are some of the key factors driving the need for better management of healthcare facilities in the APAC and Latin American countries.

Some of the major players in the healthcare workforce management systems market include IBM Corporation (U.S.), Infor, Inc. (U.S.), Oracle Corporation (U.S.), Kronos, Inc. (U.S.), SAP AG (Germany), McKesson Corporation (U.S.), and Automatic Data Processing, Inc. (U.S.).

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