

MEDICAL

IMAGE-SHARING

QUICK REPORT



Vendors in this Report





Introduction

Image sharing is part of a larger picture of adding value in radiology. The ability to share images across an organization or to other organizations is critical to create safe, quick, and cost effective healthcare. Patient images are a crucial piece of information that is often missing when patients are transferred mid-event, or treated at several different locations.

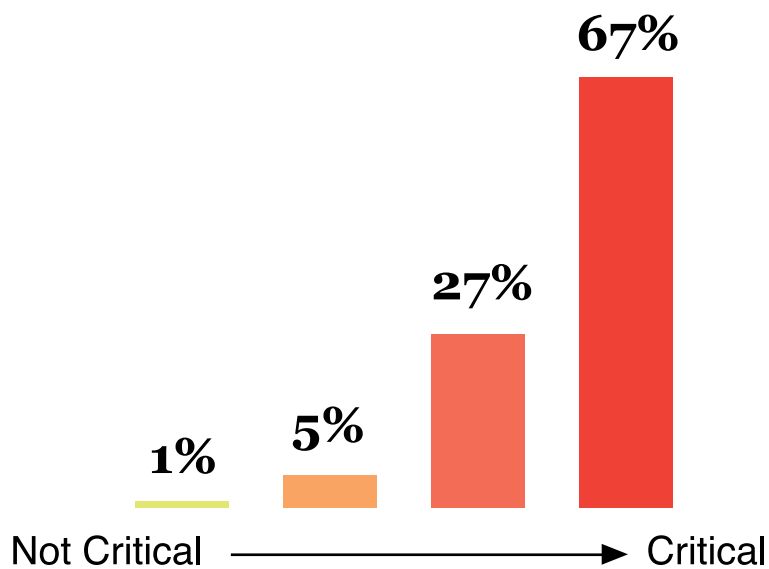
Reducing repeat imaging procedures is one of the driving factors for facilities to adopt image sharing technology. In a previous peer60 report, reducing unnecessary imaging is a top priority for 57% of providers. When patients are re-imaged, they are exposed to unnecessary radiation, which also drives up the cost of health care. According to the same report, the majority of providers said at least 20% of imaging would be classified as “unnecessary.”

Many of the current methods for sharing images are ineffective. CDs can be lost, creating a security problem for sensitive patient information. When shared with other facilities, CDs must be processed, which takes time, and sometimes these CDs are not compatible with differing PACS. Some facilities use a VPN connection, but setting that up with multiple non-affiliated organizations poses a security risk. In addition, images continue to increase in size as technology improves, creating a need for more robust storage.

Though there are certainly challenges, most providers feel the benefits of medical image sharing outweigh those challenges. Based on data collected from 574 providers, peer60 found that 67% feel image sharing is critical. Though providers see image exchange as critical, many have yet to adopt an image sharing solution. However, the market is primed for growth and many providers will soon be selecting a vendor.

Which vendors are providers currently using and which are they considering for the future? What departments within hospitals have the greatest need for sharing images? The following section shares some of the overall key findings we discovered in our research.

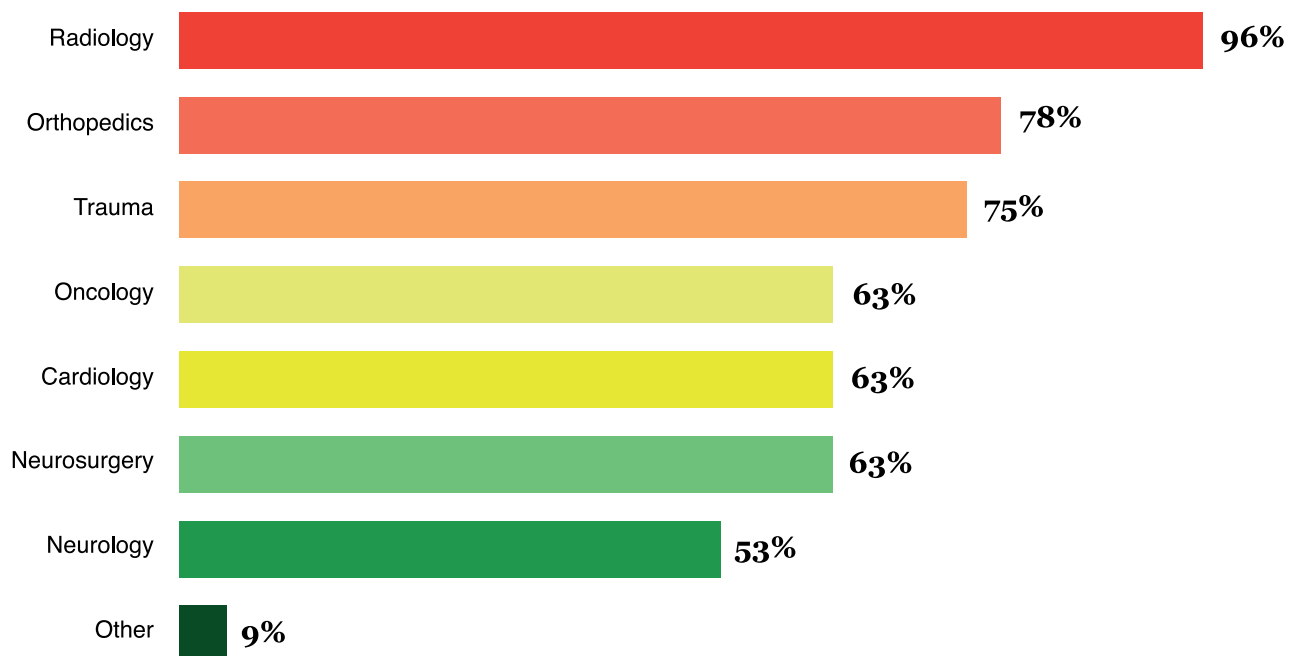
Medical image sharing is critical



Key Findings

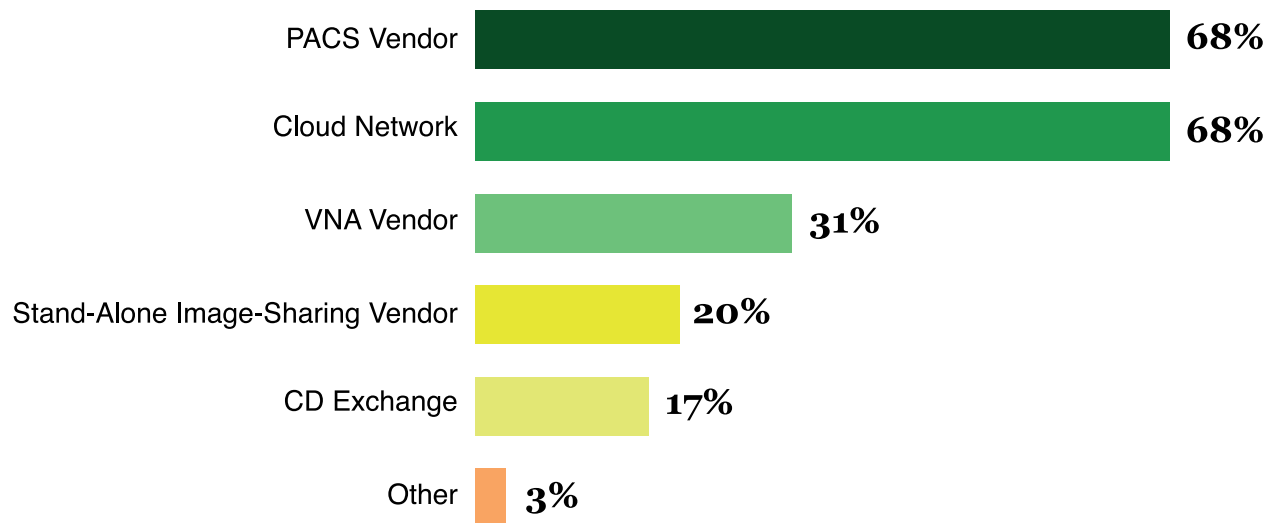
- Not surprising, almost all providers (96%) had radiology on their list of departments that had the greatest need for image sharing. Neurology was selected least often at 53%, while still a majority of providers. 35% of providers chose all departments (radiology, orthopedic, trauma, oncology, cardiology, neurosurgery, neurology).

Which departments have the greatest need for medical image sharing?



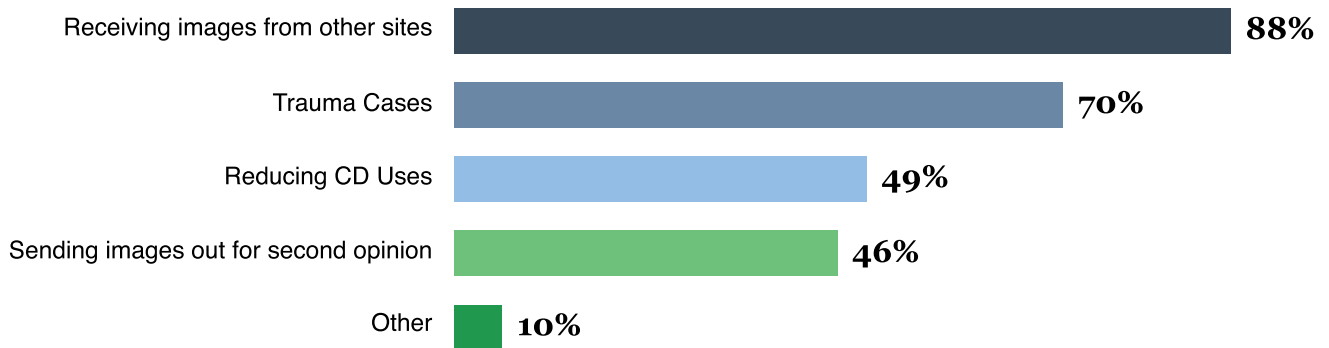
- PACS or cloud networks are the ideal technology to handle image sharing. Both of those options were selected by 68% of providers overall. On average only 31% said VNA was the best option, and only 20% said stand-alone image-sharing vendors were the best option. This is surprising because most providers are considering the stand-alone image-sharing vendor, Nuance, which doesn't offer a PACS or VNA solution. Perhaps PACS vendors have not yet stepped up their image-sharing technology to the level providers expect.

Ideal technology to handle image sharing



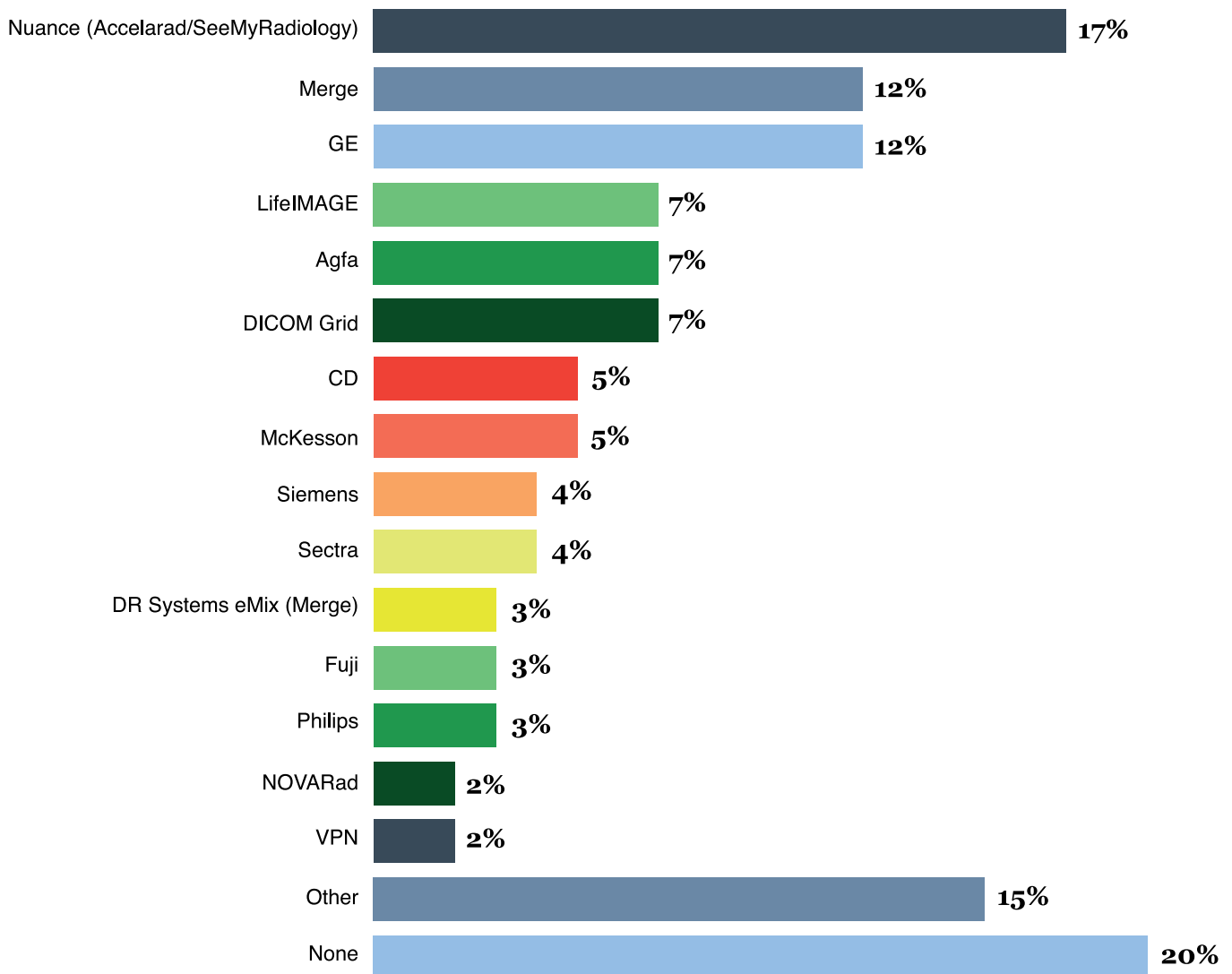
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- According to 88% of providers, receiving images from other sites was the most important component of image sharing. Sending images for a second opinion was the least important component of image sharing. However, the facilities completing the largest number of annual imaging studies (over 1 million) were more likely to consider it important compared to facilities performing fewer annual imaging studies.

Components important to image sharing (Overall)



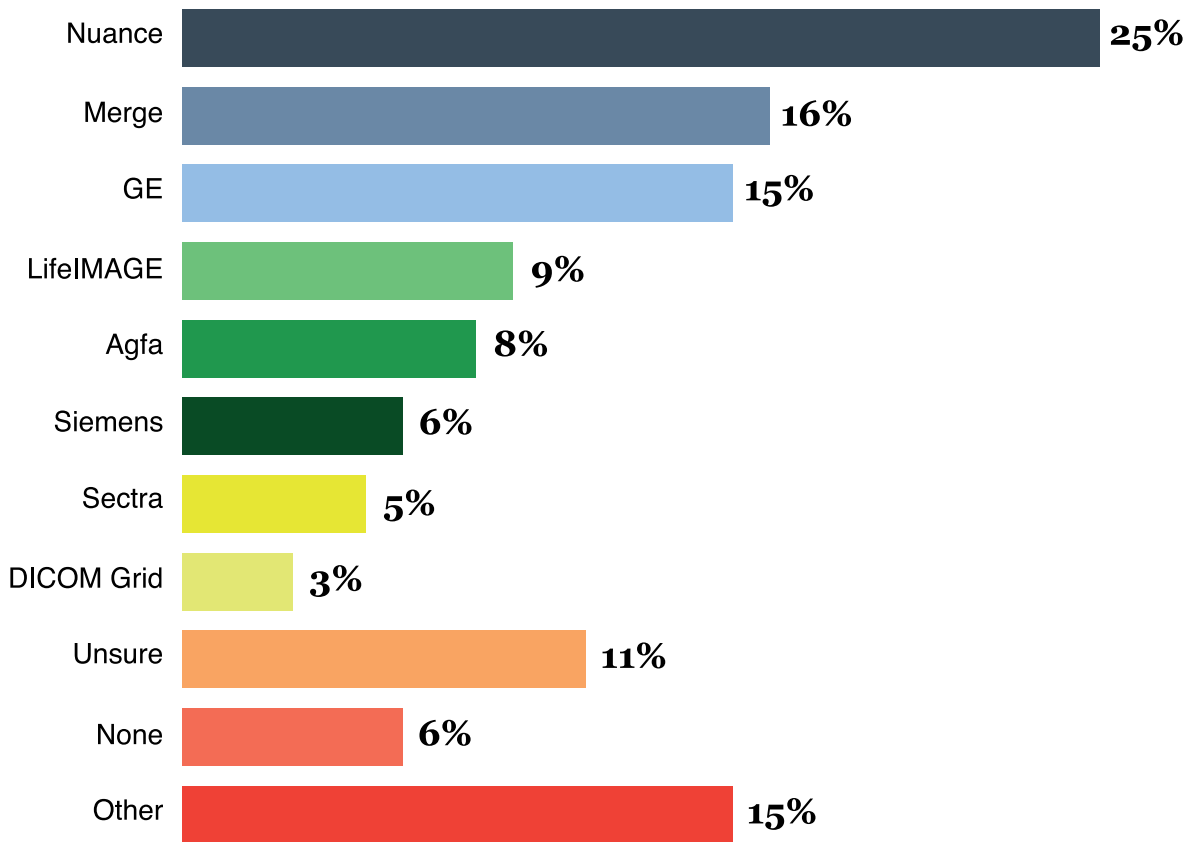
- Nuance (Accelarad/SeeMyRadiology) had the most market share and the most mind share overall. However, because there are many types of image-exchange solutions, providers are using a wide array of vendors. Those planning to purchase are also considering a wide range of vendors, including those providing PACS, VNA, and stand-alone image-sharing solutions.

Overall Market Share Leaders

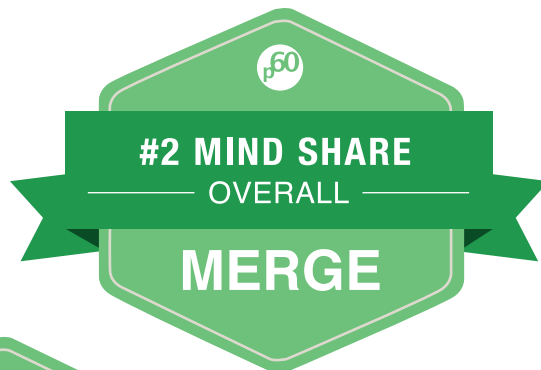


*other includes: RadConnect, Carestream, Lexmark, BEAM, Intelemage, DatCard, Viztek, CPSI, Mach7, Brit, SMAART-PACS, Nautilus, Nexgenic, Avreo, RelayHealth, Home Grown, LaurelBridge, RSNA, Cerner, APCS Enterprise Network, UltraRad, Aspyra, AGMedNet, Infinitt, Candelis, Ramssoft, Sclimage

Overall Mind Share Leaders



*other includes: RadConnect, Carestream, Mach7, RSNA, Novarad, DatCard, Lexmark, Virtual PACS, Final Solutions, Fuji, Offsite Solution, Vital Images, Fiano Solutions, DR Systems (eMix Merge)



Premium Report Content

The quick reports are available for anyone to download at no cost. However, our full comprehensive reports (including the underlying data) are only available to peer60 clients and participating healthcare provider organizations. See below for more information about obtaining our full reports. The premium content for this report includes:

- Analysis of which technology is the best option for handling image sharing. This includes a look at the preferences of facilities by the number of studies they complete annually.
- Hospitals' opinions on which departments most need image sharing by the facilities' bed size.
- Providers' mandates on the most important components of image sharing systems, and a breakout of that data by the number of study volumes.
- A much deeper look into the vendors that lead in market share and mind share, broken out by hospital, volume size, etc.
- Data on which companies are best suited to capitalize on the growth in image sharing; in other words, which vendors will win most of the new business, lose most of the new business, and which vendors are getting replaced.
- A list of the facilities that participated in this report.

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