The Future of Emergency Department Information Systems

Quick Report

Research and Report Provided by Reaction
PREMIUM REPORT CONTENT

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

- Customer recommendation ratings for EDIS, shown as an aggregate rating of all vendors. (Individual vendor C-sat recommendation scores will only be shared on an individual basis to those vendors with a ReactionData license.**)

- A discussion of ED visit volumes over the past two years, and estimates of growth over the next two years, segmented by facility size.

- Which EDIS solutions are being targeted by providers for replacement and underlying reasons why.*

- Verbatim provider feedback** about specific vendors that are at risk of losing contracts.*

- A comprehensive look at current EDIS market share and mind share leaders, with data broken out by facility size and ED visit volumes.

- A list of the healthcare facilities that participated in this research study.

Also, healthcare providers who did not participate can still receive the premium content for this study by signing up to participate in future research studies. See below for instructions.

The following are eligible to receive our comprehensive reports:

1. Clients of ReactionData with an active license. For more information about obtaining a license contact Jeremy Bikman at jeremy.bikman@reactiondata.com.

2. Healthcare provider organizations and their associated networks (Including: hospitals, clinics and practices) do not need a license to receive our full, comprehensive reports. To be eligible, at least one related employee must participate in the associated 60-second, web-based research initiative. We value participation from all caregivers, technology and support personnel, and leadership.

*Because of the sensitive nature of individual vendor data, we withhold this information and disseminate it only to the vendor in question.

**We do not disclose participant names or their healthcare facilities when sharing provider feedback.
VENDORS COVERED IN THIS REPORT

- Allscripts™
- Cerner™
- ECLIPSYS®
- +EDIMS
- empower systems™
- EPOWERSDOC
- Epic
- Evident
- Healthland®
- IBEX GLOBAL
- LOGICARE
- MCKESSON
- MEDHOST®
- MEDITECH
- NEXTGEN HEALTHCARE
- OPTUM
INTRODUCTION

The emergency department (ED) is a crucial component of a hospital’s ability to care for critically ill and injured patients. In fact, the ED handles 28%\(^1\) of all acute care visits in the U.S. It is also the bridge connecting the outpatient and inpatient worlds. About 81.8% of unscheduled admissions to the hospital now come through the emergency department, according to the American College of Emergency Physicians (ACEP) 2013 report\(^2\).

Visits to the ED have risen over the past several years and are expected to keep rising. Changes in healthcare have exacerbated the general trend. For instance, healthcare reform has created a primary care shortage, with a group of newly insured patients, most of whom do not have a primary care provider (PCP) and cannot get one. Because of that, many of these patients end up in the ED.

Emergency medicine providers have been tasked with handling huge increases in patient load, and making sure patients who are admitted have a smooth transition into the hospital. The emergency department information system (EDIS) is a big part of their ability to manage these tasks. Patient throughput and efficiency are more important than ever and an EDIS can make or break a clinician’s workflow.

As ED visits continue to rise, so does the global EDIS market. In 2014, the EDIS market was valued at $312.68 million and is expected to grow to $635.50 million in 2019\(^3\). According to data gathered by ReactionData over a recent 10-day period, more than 400 emergency medicine providers revealed that about a third of hospitals will be replacing their ED vendor. In this report, we get to the bottom of which vendors are best suited to help providers as they take on more and more patients. What exactly is driving the increase in ED visits? Which vendors are poised to gain market share, and which may stand to lose it? What can vendors do to keep their clients and save at risk contracts? These topics, and more, will be covered in this report.

Author:
Holly Wallace
Director of Market Data

Co Author:
Taylor Madsen
Sr. Research Product Manager
tmadsen@reactiondata.com

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\(^1\) Carrier, Emily R., Kellermann, Arthur L. “Where Americans Get Acute Care: Increasingly, It’s Not At Their Doctor’s Office.” Health Aff September 2010 vol. 29 no. 9 1620-1629 http://content.healthaffairs.org/content/29/9/1620.full.html


KEY FINDINGS

ED VISIT VOLUMES INCREASE YEAR-OVER-YEAR

4 out of 5 (82%) providers report that the number of ED visits increased over the last two years. Nearly the same amount (83%) say the number will continue to increase, however the increase will not be as significant. When comparing what happened over the last two years with what will happen over the next two years, a relatively small portion of providers predict an increase of over 10% in the next two years. An increase of over 10% was seen by 31% of providers over the past two years, vs. 17% of providers over the next two years. A lack of primary care providers and an increase in insured patients have created a perfect storm for patients who have little choice but to turn to the ED for treatment.
MEDITECH leads in market share among EDIS vendors, but struggles in mind share. Epic and Cerner are the true masters of EDIS when considering market share and mind share together. When broken down by facility size, both Epic and Cerner consistently maintain top three positions in both market share and mind share. Best of breed vendors struggle to make a substantial impact in the EDIS market.
THE FUTURE OF EMERGENCY DEPARTMENT INFORMATION SYSTEMS

MEDITECH
#1 MARKET SHARE
OVERALL

#2 MARKET SHARE
EPIC
OVERALL

#3 MARKET SHARE
CERNER
OVERALL

EPIC
#1 MIND SHARE
OVERALL

CERNER
#2 MIND SHARE
OVERALL

MEDITECH
#3 MIND SHARE
OVERALL
HOSPITALS PLANNING TO SWITCH EDIS VENDORS

One in three hospitals say they plan to switch EDIS vendors in the near future. Providers are increasingly adopting an enterprise vendor approach, meaning, some vendors will be moving toward their EHR vendor’s EDIS. The following are vendors are most in danger of losing clients: Allscripts, athenahealth, Cerner, Epic, Evident (CPSI), Healthland, McKesson, MEDHOST, MEDITECH, NextGen, Optum, T-System.

We have detailed information regarding vendor replacements - not only which vendors will be replaced, but why they will be replaced, and which vendor will be getting the business. Please contact your ReactionData representative to get this additional information.

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WILL EDIS CLIENTS RECOMMEND THEIR VENDORS?

When asked how likely they would be to recommend their current vendor, providers gave an average score of 5.7 (on a scale of 0-10). It appears that overall, emergency department leadership are not overly enthusiastic about recommending their vendors. It is important to note, however, that there is a huge margin between the highest rated vendor and the lowest rated vendor. The highest average score a vendor received is a very respectable 8, and the lowest is a rather shocking 2.7.

Clients gave recommendation ratings for the following vendors: Allscripts, Cerner, Epic, Evident (CPSI), Healthland, McKesson, MEDHOST, MEDITECH, NextGen, Optum, T-System.
Providers are looking for vendors who can make their lives easier. To that point, ease of use shows up as the top concern among providers who were asked what vendors can do to keep them as a client. Emergency medicine providers need a solution that will not slow them down, and can keep up with a demanding pace. Reporting is also an important component, especially as healthcare moves in a direction where data mining and business intelligence are of ever growing importance. This is due in no small part to the increased demand to coordinate care.

What Can EDIS Vendors Do to Keep Clients? - Overall

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make It Easier to Use</td>
<td>49%</td>
</tr>
<tr>
<td>Doesn’t Matter - Adopting our EHR Vendor’s EDIS</td>
<td>33%</td>
</tr>
<tr>
<td>Improve Reporting</td>
<td>32%</td>
</tr>
<tr>
<td>More Robust Platform</td>
<td>26%</td>
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<tr>
<td>Improve Customer Service</td>
<td>23%</td>
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<tr>
<td>Reduce Cost</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
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Why We Release Our Research to the Healthcare Community?

Does your organization budget money each year for market research initiatives, reports or tools that typically provide little or no ROI? Unfortunately, the market research industry has operated for so long on very outdated and flawed methodologies that businesses rarely use the terms “market research” and “ROI” in the same sentence. We’re on a “mission of mercy” to show what effective business research should look like and our free industry reports are the wakeup call.

Businesses today are sandwiched between handing control of research projects to slow, outdated firms or conducting their own research through the use of survey tools. Both options are recipes for underwhelming performance and depressingly low expectations. So why do organizations keep conducting business research? Because getting intel is that important. You’ve heard the saying, “Some data is better than no data?”

With that, we give you Reaction, the world’s first Research as a Service (RaaS) platform designed for use within your business. That’s right, we are not a market research firm and please don’t ever call us one. At its core, we designed Reaction to make ROI the focus of all business research you conduct with your customers, prospective customers or the market at large. Because of our user network of more than 250,000 healthcare providers and our methodology of best practices, Reaction is blazing fast, elicits an incredible response from any healthcare provider audience and creates direct opportunities to generate new business…some people call that lead generation.

When we let Reaction out of its cage, we couldn’t let our clients have all the fun. So, we use Reaction to gather super salient data in days, not months on a host of healthcare topics to show the market what business research should look like. The takeaway? Demand much more from your market research budget. To find more contact Jeremy Bikman at jeremy.bikman@reactiondata.com or visit us at www.reactiondata.com.