

REPORT ON MEDICAL IMAGING USAGE AND MARKET TRENDS

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# IDEAL IMAGING TRENDS

BASED ON DATA COLLECTED SEPTEMBER 2017

Reaction  
—Data—

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# EXECUTIVE SUMMARY

Current trends in radiology imaging are shifting at a rapid rate. The past few years have seen a bit of a shift where organizations using a "one-stop-shop" approach for imaging solutions have begun considering a "best-of-breed" (deconstructed PACS) strategy instead. There hasn't been a tectonic shift in this direction as of yet, but there's been enough "noise" to make the industry pay attention. While some organizations embrace the benefits of using multiple vendors, others prefer the accountability and relationship growth of a single vendor. This report consolidates data received from 269 imaging professionals ranging in roles from Imaging and Radiology Directors to radiologists, and analyzes the companies they are using in order to better understand these shifts. Included is data on the six largest companies in our data's market presence, Agfa Healthcare, Fuji, GE Healthcare, IBM Watson Health (Merge), Change Healthcare (McKesson), and Philips Healthcare, showing:

- NPS Customer Ratings
- Customer Comments
- Replacement rates
- Which imaging strategies are becoming more popular
- Which vendors are winning deals
- Which vendors are losing deals

We also have research on other vendors included in a separate section of this report that detail customer satisfaction and other applicable data.

In 2016, 92% of imaging professionals preferred to work with a single vendor for their imaging needs. In 2017, this percentage dropped to 77%, indicating the desire to move

towards multiple vendors that could more easily meet end-user needs. Preferences for using an enterprise or best-of-breed approach varies largely based on the role of the professional we questioned. Almost two-thirds of Directors of Radiology and Imaging prefer the simplicity of working with a single vendor, while over half of Radiologists instead prefer the functionality and possibilities of using multiple vendors for their PACS and VNA. Our research shows that much of this preference depends on the companies that are being worked with and the functionality they offer.

The most sought-after vendors are ones that offer a product that is both easy to use, and functionally rich. For example, many radiologists described how their imaging software required "too many clicks" for simple tasks, while products that simply "made sense" were praised. The collected data in this report consists of opinions from radiology professionals about their experiences with their current vendors, as well as what they would like to see in their PACS and VNA.

We gathered our research by inviting imaging leaders from almost every hospital and major imaging center in the country to participate. This helped ensure randomness in the data pool. As you'll see, some vendors' customer base responded in large numbers, while others did not respond practically at all. The reasons for this discrepancy are not readily apparent.

There is an order of magnitude more research on this topic in our platform that we are not able to share in a report format. To learn more about how to access all of this additional research contact Taylor Madsen - [tmadsen@reactiondata.com](mailto:tmadsen@reactiondata.com)

# VENDORS

## VENDORS COVERED IN-DEPTH



## OTHER VENDORS COVERED

Carestream

NovaRad

Intelerad

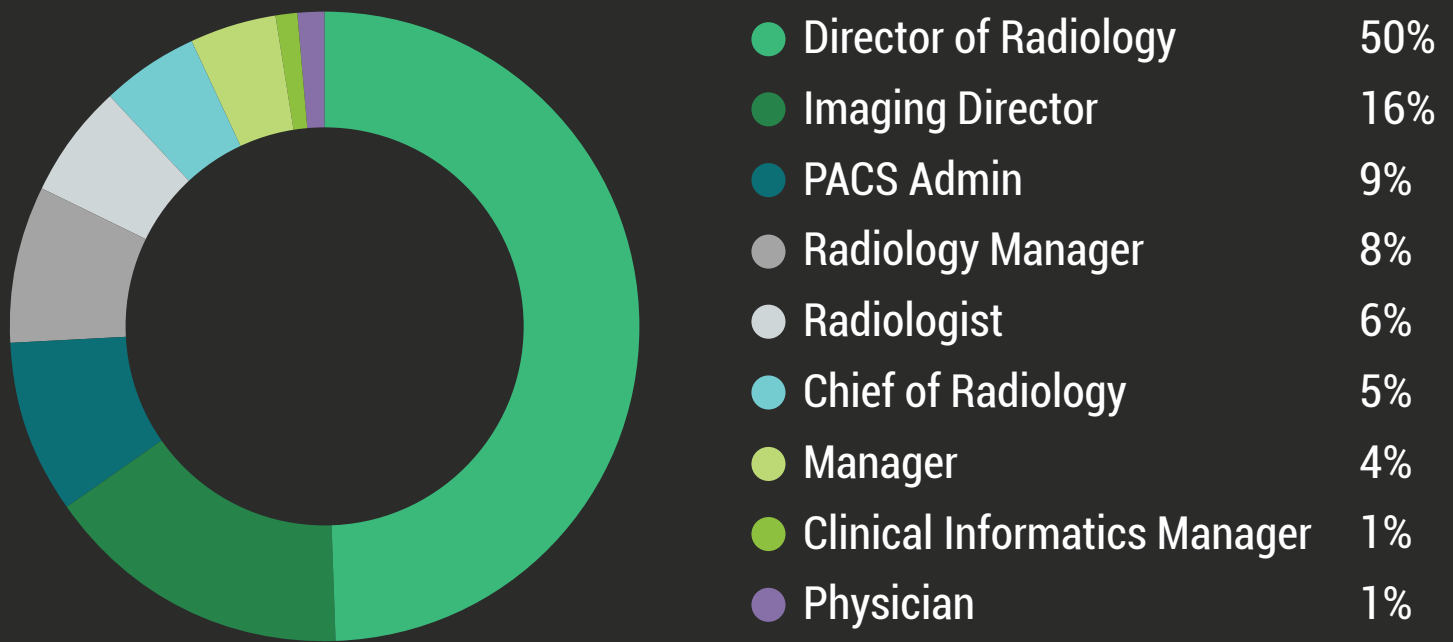
Sectra

# DEMOGRAPHICS

## NUMBER OF PARTICIPANTS



## WHO PARTICIPATED?



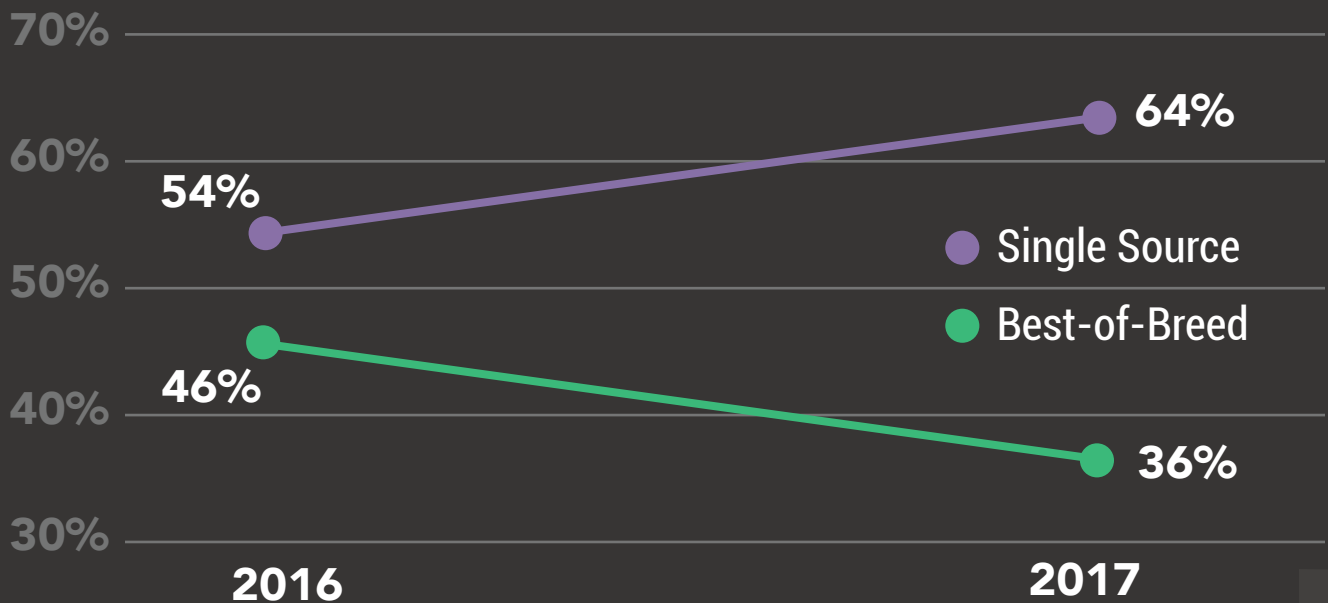
To ensure we received the highest quality data for our research, we collected input from 269 professionals in radiology from 237 organizations. Because we knew that the people who use imaging technology on a daily basis would give us the most accurate and unbiased responses towards what they wanted from their vendors, we targeted imaging professionals across the country as our sole source of information. We asked them what they liked and didn't like from their current vendors, as well as what they'd like to see in the future, all to better understand what aspects professionals wanted in their ideal imaging configuration.

# IMAGING APPROACH

## CURRENT APPROACH

SINGLE SOURCE 64%  
BEST-of-BREED 36%

### SINGLE SOURCE ON THE RISE?



### PREFERRED CONFIGURATION BY SINGLE SOURCE USERS

"We like using one vendor for all our imaging solutions"

77%

"We would rather pick the best vendor for each solution"

23%

### PREFERRED CONFIGURATION BY BEST-OF-BREED USERS

"We would rather just use one vendor for all our imaging solutions"

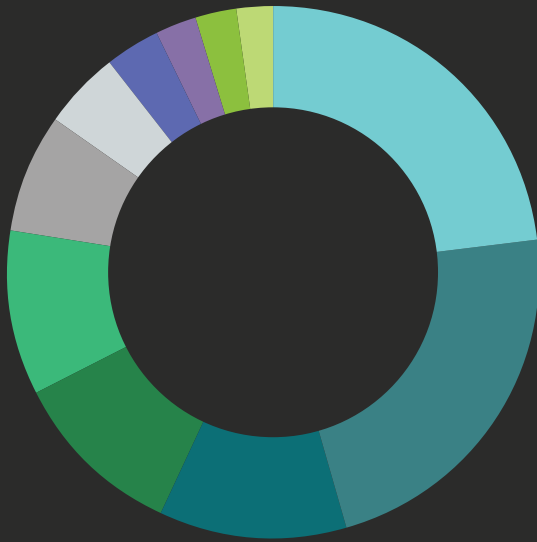
35%

"We like choosing the best vendor for each solution"

65%

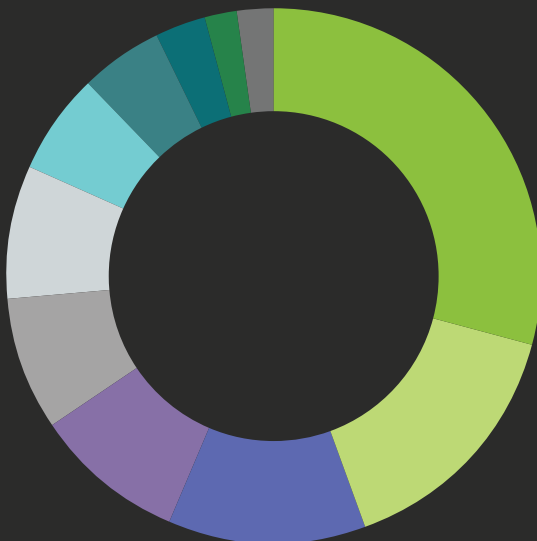
# VENDORS BEING USED

## SINGLE SOURCE



● GE Healthcare	23%
● Change Healthcare (McKesson)	22%
● Philips Healthcare	11%
● IBM Watson Health	11%
● FUJIFILM Medical Systems	10%
● Agfa Healthcare	7%
● Sectra	5%
● NovaRad	3%
● SIEMENS Healthineers	3%
● CPSI	3%
● Carestream	2%

## BEST-OF-BREED



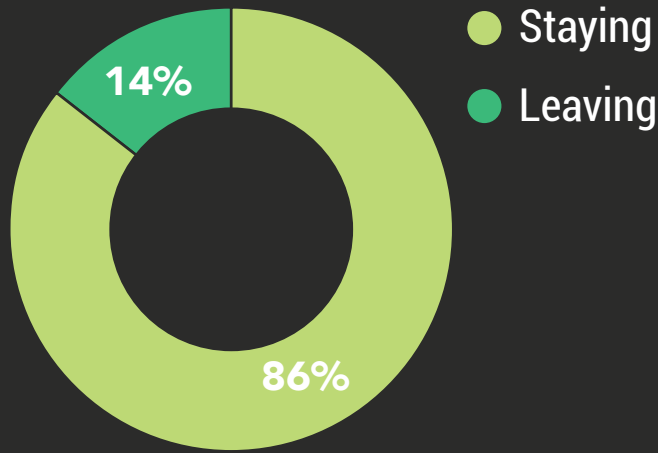
● GE Healthcare	29%
● IBM Watson Health	15%
● FUJIFILM Medical Systems	12%
● Intelerad	9%
● Philips Healthcare	8%
● Carestream	8%
● Agfa Healthcare	6%
● NovaRad	5%
● Nuance	3%
● Sectra	2%
● Hyland (Lexmark)	2%

The percentage of imaging vendors that are represented in our data between 2016 and 2017 has largely remained stable. The biggest exceptions to this are the two companies with the largest presence: Change and GE Healthcare, which together make up almost half of the market presence in our data. McKesson dropped by a margin of 10% down to 22%, while GE Healthcare rose 8% to 23% to become the most widely used imaging vendor for those looking for one single source for their imaging needs. This report focuses on the six most widely represented companies in our research.

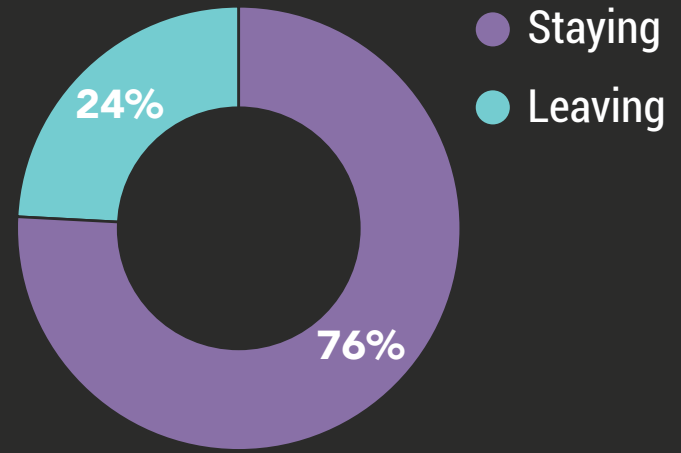


# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED

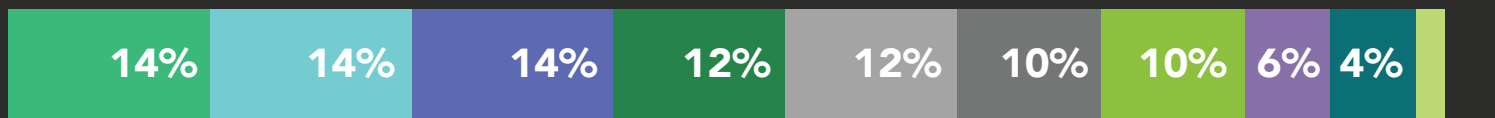


## WHERE ARE PROVIDERS GOING?

### Single source (enterprise) vendors being considered



### Best-of-Breed vendors being considered



- Change
- Philips
- IBM
- GE
- Fuji
- Carestream
- Sectra
- NovaRad
- Agfa
- Intelrad

It is far from a guarantee that imaging professionals will stay with their imaging vendor. This year, vendor replacement rates for single source users was 14.3% and best-of-breed was 28.2%. Lack of support was the single biggest reason for replacement, with multiple mentions of the age of platforms being a large factor in the decision to change vendors.

# SECTION II

## VENDOR BREAKOUTS

The previous section has been an overall view of the data collected. In section two we look at individual vendors. We discuss their customer satisfaction, replacement rates, winning of business, and customer comments.

As stated in the executive summary, for each report we do, we reach out to thousands of hospitals and clinics. We are not sure why some customers seem to respond more than others. This is why you'll see varying levels of breakouts for the different vendors.

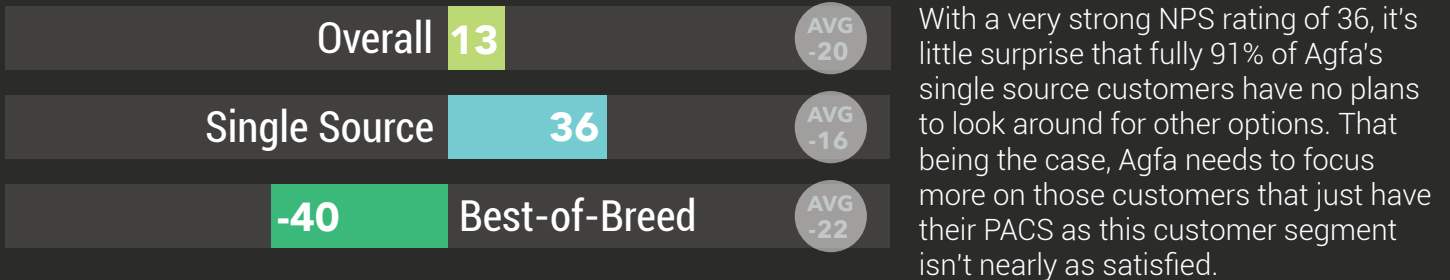
Just FYI as you look at each vendor, an NPS (Net Promoter Score) is a great indicator as to the overall experience of working with the company, as it's based on the impressions of actual users. NPS scores offer a fast touchstone on the companies to quickly see overall customer satisfaction.



## IN-DEPTH VENDOR BREAKOUTS THIS WAY

# AGFA HEALTHCARE

## NET PROMOTER SCORE



## CUSTOMER FEEDBACK

### SINGLE VENDOR

- 32% GOOD STABILITY/RELIABILITY
- 14% GOOD INNOVATION
- 14% GOOD FUNCTIONALITY
- 14% GOOD SUPPORT/SERVICE
- 9% GOOD USABILITY
- 5% POOR FUNCTIONALITY
- 5% POOR INNOVATION
- 5% FAIR SUPPORT/SERVICE
- 5% GOOD PRICE

### BEST-OF-BREED

- 29% GOOD STABILITY/RELIABILITY
- 29% POOR SUPPORT/SERVICE
- 14% GOOD USABILITY
- 14% POOR INNOVATION
- 9% FAIR USABILITY

### SINGLE SOURCE CUSTOMER FEEDBACK

Director of Radiology - "I know they keep PACS running and that's all I care about. Upgrades are completed when needed. But to be a 9/10 would require better communication on issues that might arise."

Director of Radiology - "They have an expansive vision of what enterprise imaging should be, and they are developing their software in a direction that is consistent with the vision at my institution."

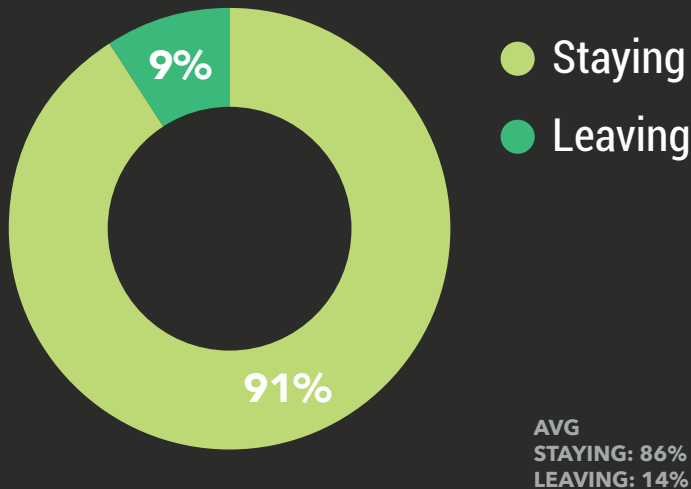
### BEST-OF-BREED CUSTOMER FEEDBACK

Director of Imaging - "Ease of use and reliability are the best things about our Agfa PACS"

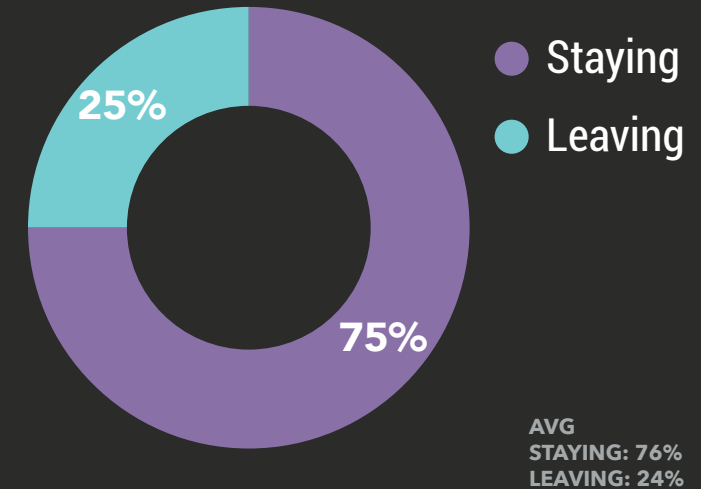
Director of Radiology - "It has been reliable and easy to navigate, although sometimes slow to pull studies. It is old and near end of life."

# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED



# WINNING BUSINESS

## SINGLE SOURCE

of those looking for a new single source vendor,  
**3%**  
say AGFA is their top choice

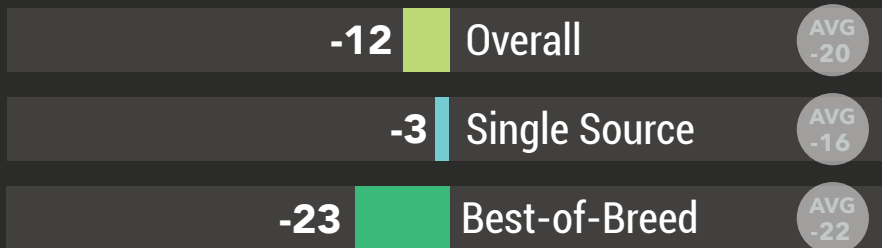
## BEST-OF-BREED

of those looking for a new PACS or VNA,  
**4%**  
say AGFA is their top choice

Agfa's strengths include the overall stability/reliability of its solutions and its ability to provide good customer service and support. Many of their customers highlighted the strength of their relationship with Agfa's customer service organization, and particularly Agfa's willingness to work through any issues that might arise with its solutions. This is an incredibly important aspect of Agfa and is a reason why they've been doing well in the market as of late. While most customers are happy with Agfa, there are a few areas of weakness that should be addressed – reducing the overall cost and improving product functionality at a faster rate. To sway those who are currently in a wait-and-see mode (passive ratings) towards Agfa, they'll also need to offer even better customer service to offset some frustration in waiting for promised functionality.

# Change Healthcare (McKesson)

## NET PROMOTER SCORE



While on the surface Change's tepid customer ratings are a concern, it should be noted that more than half of all Change customers rated them a 7 or 8 on the 0-10 scale. These "passive" customers represent a significant opportunity for Change to quickly tip the scales in its favor.

## CUSTOMER FEEDBACK

### SINGLE VENDOR

- 17% GOOD FUNCTIONALITY
- 15% GOOD USABILITY
- 15% GOOD SUPPORT/SERVICE
- 11% GOOD STABILITY/RELIABILITY
- 9% POOR FUNCTIONALITY
- 7% HIGH QUALITY
- 7% POOR SUPPORT/SERVICE
- 4% POOR USABILITY
- 4% POOR PRICE

### BEST-OF-BREED

- 15% GOOD STABILITY/RELIABILITY
- 15% POOR SUPPORT/SERVICE
- 15% GOOD FUNCTIONALITY
- 10% GOOD USABILITY
- 10% POOR FUNCTIONALITY
- 10% POOR USABILITY
- 5% GOOD SUPPORT/SERVICE
- 5% HIGH QUALITY
- 5% POOR INNOVATION

### ENTERPRISE CUSTOMER FEEDBACK

Radiologist - "They are very engaged and responsive to you as a customer. The build is relatively open allowing you to leverage the expertise of your internal IT teams. The setup is fairly customizable allowing you to design the system to meet the local needs."

Imaging Systems Specialist - "The customer service is great. Overall it's just a great product."

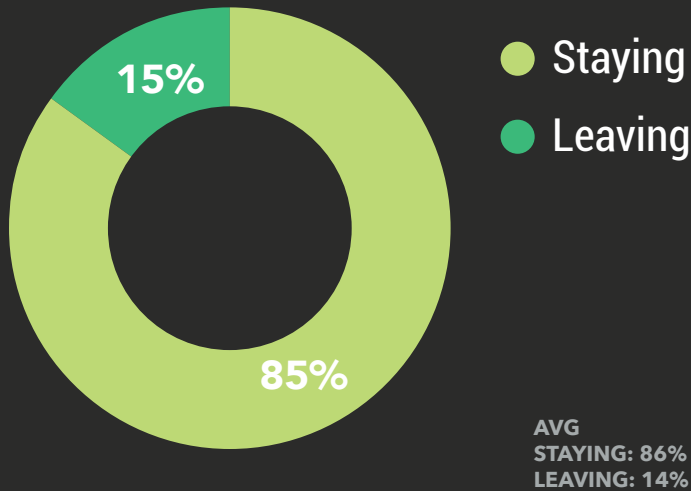
### BEST-OF-BREED CUSTOMER FEEDBACK

Director of Radiology - "It's easy to use and has all the features we need."

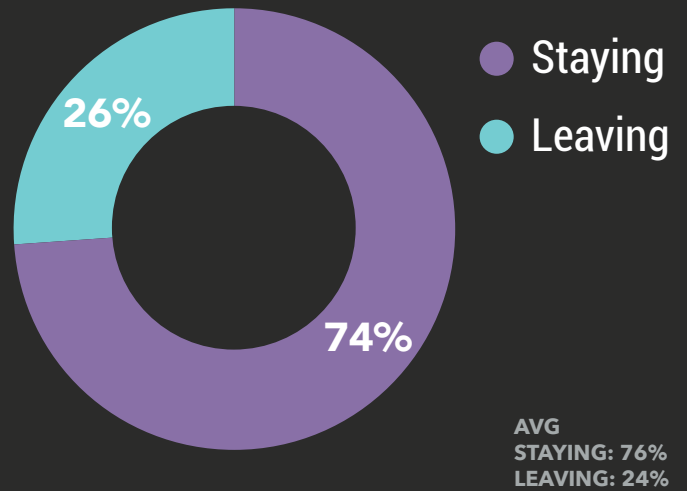
Director of Radiology - "It is extremely difficult to get usable data from the system. McKesson has many modules that feed into PACS, but they are separate."

# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED



# WINNING BUSINESS

## SINGLE SOURCE

of those looking for a new single source vendor,  
**23%**  
say Change is their top choice

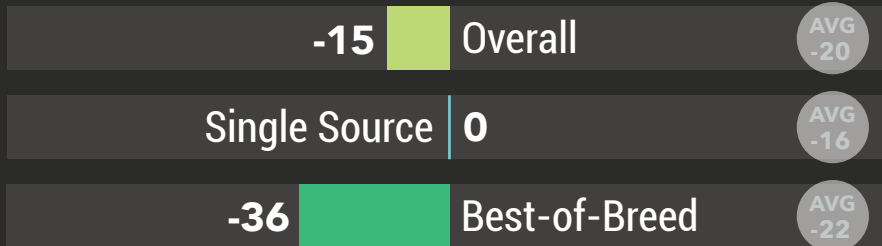
## BEST-OF-BREED

of those looking for a new PACS or VNA,  
**14%**  
say Change is their top choice

Change Healthcare (McKesson) is fairly neutral with its NPS, scoring -3 with those using it as their only vendor. However, the majority of the comments we received put McKesson in a very good light, talking about the excellent support, ease of use, and quality functionality. The main negative aspect we found was the customer service was often slow in meeting the needs of those using the system. Change Healthcare is a solid choice for those looking to change their imaging needs, especially if they are able to pull their passive audience into the positive by improving their tech support. Even though Change's NPS scores are less than stellar at the moment, their significant historical strength in this regard carries enough weight that a large number of organizations will continue to place them on their shortlist for a new PACS or VNA.

# FUJIFILM Medical Systems

## NET PROMOTER SCORE



Fuji's reputation in the past was one of innovation and excitement and its 2015 acquisition of TeraMedica gave it a full portfolio of core imaging solutions. With mediocre customer ratings spanning functionality and service, Fuji has its work cut out for it in regaining its excitement and energy in the industry.

## CUSTOMER FEEDBACK

### SINGLE VENDOR

- 20% GOOD SUPPORT/SERVICE
- 20% GOOD FUNCTIONALITY
- 13% POOR SUPPORT/SERVICE
- 7% GOOD USABILITY
- 7% GOOD STABILITY/RELIABILITY
- 7% POOR FUNCTIONALITY
- 7% POOR USABILITY
- 7% FAIR FUNCTIONALITY
- 7% POOR INNOVATION

### BEST-OF-BREED

- 20% GOOD SUPPORT/SERVICE
- 20% GOOD USABILITY
- 20% POOR FUNCTIONALITY
- 20% POOR SUPPORT/SERVICE
- 20% GOOD INTEROPERABILITY

### SINGLE SOURCE CUSTOMER FEEDBACK

Director of Radiology - "Fuji has excellent customer service."

Administrative Director of Diagnostic Imaging - "We've really liked their customer support."

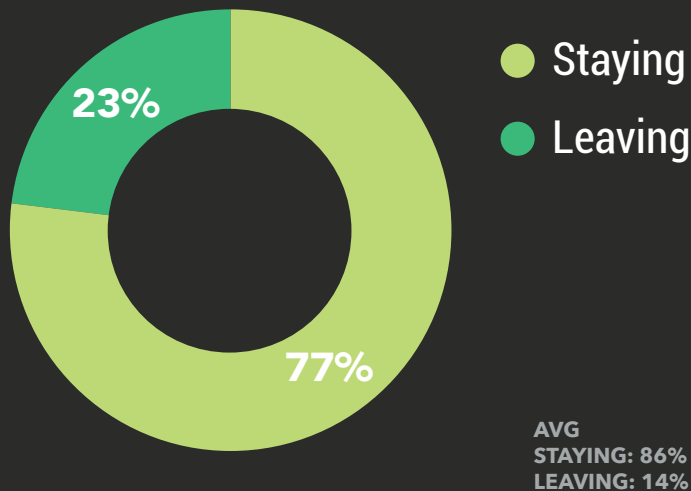
### BEST-OF-BREED CUSTOMER FEEDBACK

Radiologist - "Phone and follow up on site problem solving, when needed, is prompt and helpful."

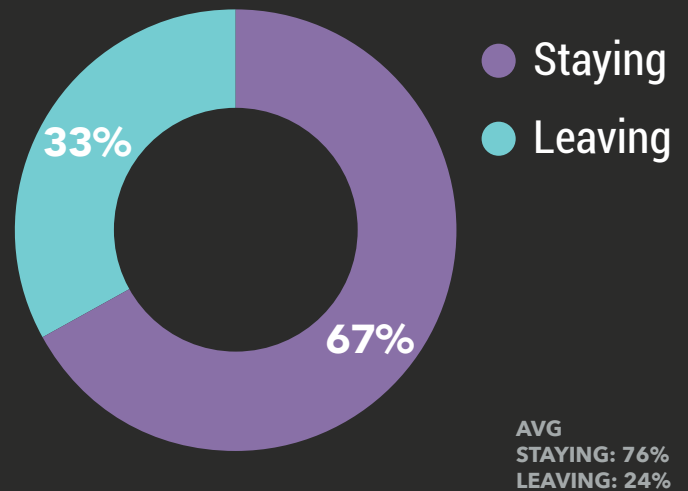
Director of Radiology - "We use it, but I am not a fan of the Fuji system."

# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED



# WINNING BUSINESS

## SINGLE SOURCE

of those looking for a new single source vendor,  
**7%**  
say Fuji is their top choice

## BEST-OF-BREED

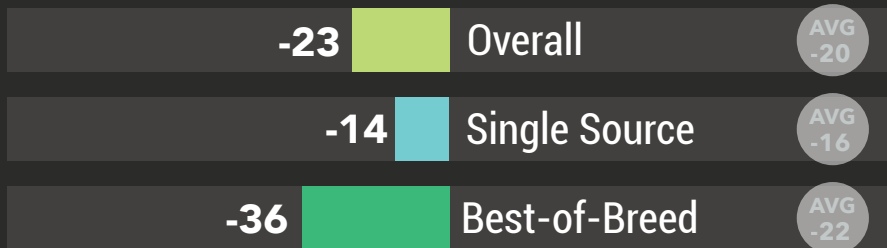
of those looking for a new PACS or VNA,  
**12%**  
say Fuji is their top choice

According to our data Fuji stayed relatively stable in its market foothold between 2016 and 2017, currently used by about 10% of facilities in our data pool. Our feedback on Fuji stresses the quality of their system as well as its high standard of performance. The functionality of the system was said to be a big help to radiologists and their overall workflow. While most users like Fuji, an increased focus on improving its support would help change passive customers like Fuji into promoters (which is very important). Some customers related their frustrated with the aging of Fuji's solutions and would like to see innovation to occur at a faster rate than it is currently.



# GE Healthcare

## NET PROMOTER SCORE



While GE's ratings aren't stellar they still have a strong market presence and continue to make it to the final stages in most deals. As GE has proven time and time again, no matter how many times they stumble they always rise back up again.

## CUSTOMER FEEDBACK

### SINGLE VENDOR

- 17% GOOD SUPPORT/SERVICE
- 17% POOR SUPPORT/SERVICE
- 14% GOOD STABILITY/RELIABILITY
- 14% GOOD USABILITY
- 10% GOOD FUNCTIONALITY
- 7% POOR FUNCTIONALITY
- 7% POOR INNOVATION
- 3% POOR INTEROPERABILITY
- 3% GOOD IMPLEMENTATION

### BEST-OF-BREED

- 20% GOOD SUPPORT/SERVICE
- 20% GOOD USABILITY
- 10% GOOD STABILITY/RELIABILITY
- 10% POOR FUNCTIONALITY
- 10% POOR SUPPORT/SERVICE
- 10% FAIR FUNCTIONALITY
- 10% GOOD INTEROPERABILITY
- 10% POOR PRICE

### SINGLE SOURCE CUSTOMER FEEDBACK

Director of Radiology - "Robust system, very good up times. User friendly, easy to use."

Radiologist - "It works well and they can fix the problems that arise. Also, it is easy to use."

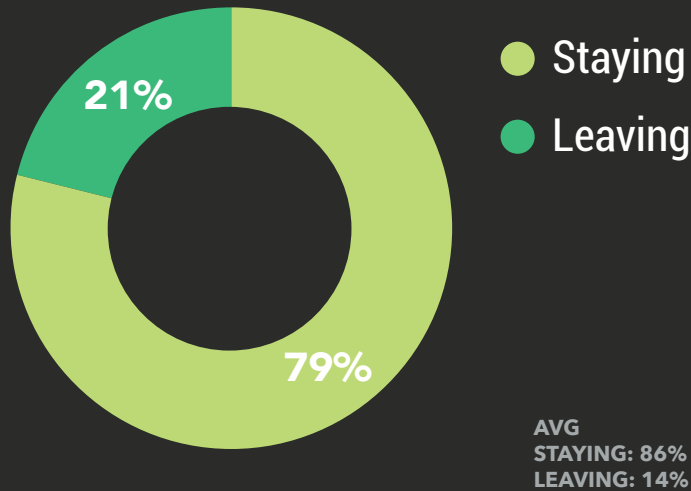
### BEST-OF-BREED CUSTOMER FEEDBACK

Director of Imaging - "Customer service is excellent. We were able to use our own VNA. Easy to use viewer."

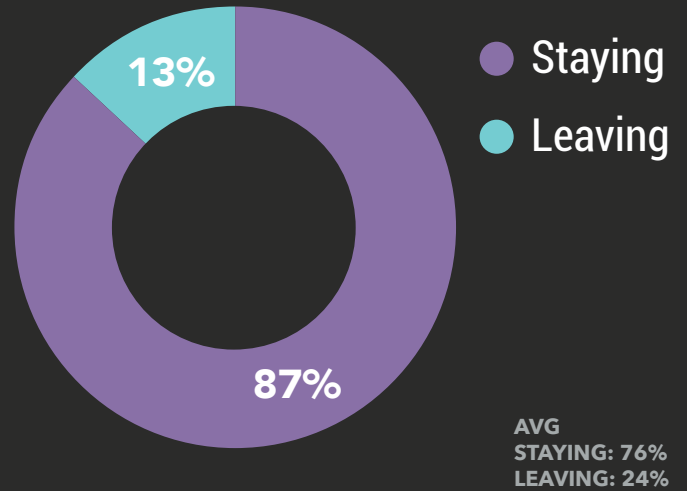
Radiology Manager - "I believe that there are flaws and challenges in every PACS system. GE Centricity seems to have a pretty adaptable PACS system."

# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED



# WINNING BUSINESS

## SINGLE SOURCE

of those looking for a new single source vendor,  
**13%**  
say GE is their top choice

## BEST-OF-BREED

of those looking for a new PACS or VNA,  
**14%**  
say GE is their top choice

2017 was a solid year for GE Healthcare, at least according to our participant pool. They showed up with a large market footprint. Many users described the ease of use with the system and their willingness to quickly address issues that arise. This is notable as these characteristics haven't always applied to GE. While GE's customer ratings place it on the wrong side of the NPS scale, almost half of the respondents were in the passive category which means by putting more emphasis on this group the overall tone of their customer base could improve in short order, specifically by beefing up R&D spend to deliver more advanced features.

# IBM WATSON HEALTH

## NET PROMOTER SCORE

-45	Overall	AVG -20
-31	Single Source	AVG -16
-62	Best-of-Breed	AVG -22

IBM's data is easily the most intriguing in this report. Its customer ratings are nothing to write home about but in the coveted enterprise (single source) space fully 92% of their customers plan to stay with them. In addition, in replacement deals for single source and best-of-breed, IBM is short-listed in a high number of deals. The main area IBM needs to place its focus is in firming up its relationship with best-of-breed customers.

## CUSTOMER FEEDBACK

### SINGLE VENDOR

- 13% GOOD SUPPORT/SERVICE
- 13% POOR SUPPORT/SERVICE
- 13% FAIR FUNCTIONALITY
- 13% GOOD FUNCTIONALITY
- 7% GOOD USABILITY
- 7% POOR USABILITY
- 7% FAIR SUPPORT/SERVICE
- 7% FAIR USABILITY
- 7% GOOD INNOVATION

### BEST-OF-BREED

- 33% POOR FUNCTIONALITY
- 25% POOR INTEROPERABILITY
- 17% POOR SUPPORT/SERVICE
- 8% GOOD STABILITY/RELIABILITY
- 8% POOR INNOVATION
- 8% GOOD SUPPORT/SERVICE

### SINGLE SOURCE CUSTOMER FEEDBACK

Chief Radiologist - "Have been imperfect, but largely delivered what was promised, and function relatively well."

Director of Imaging - "I like the single vendor solution, we use Merge for our Hemo, CPACS, PACS, and VNA. Working with one vendor removes the finger pointing when issues arise."

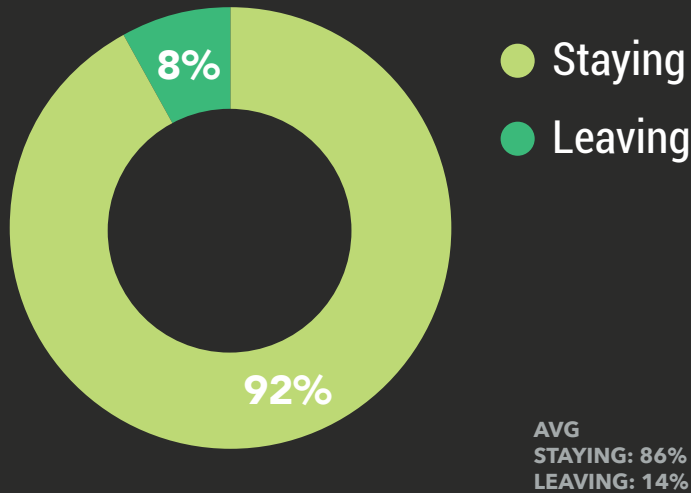
### BEST-OF-BREED CUSTOMER FEEDBACK

Director of Radiology - Reliable application; excellent vendor communication and follow-through

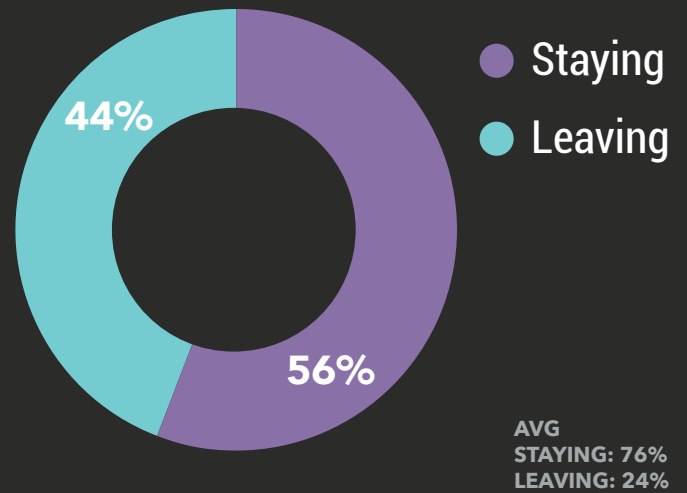
Director of Radiology - The product does not appear to offer a full integrated solution with clinical solutions surrounding high reliability

# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED



# WINNING BUSINESS

## SINGLE SOURCE

of those looking for a new single source vendor,  
**17%**  
say IBM is their top choice

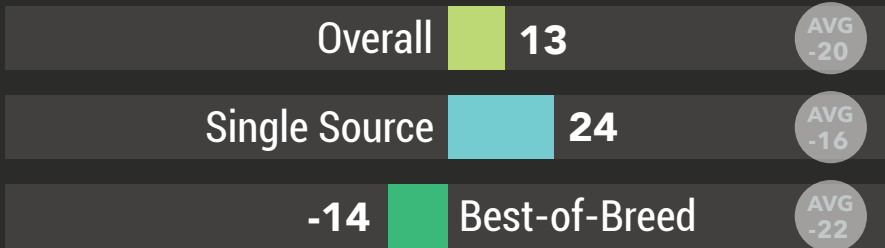
## BEST-OF-BREED

of those looking for a new PACS or VNA,  
**14%**  
say IBM is their top choice

IBM currently has about 10% of the market presence in our data. Many users described the excellent functionality that IBM offers its customers, specifically as it relates to radiologist workflow. However, IBM struggled in NPS ratings, with many users stating that the system was poorly supported by IBM's customer service team while also wanting more functionality. If IBM can fix this they will very quickly convert most of their passive customers into promoters and then can expect to see a corresponding uptick in their business.

# Philips Healthcare

## NET PROMOTER SCORE



Enterprise, enterprise, enterprise. This represents a focus Philips set years ago and the research verifies that it's definitely Philips' sweet spot. Its happiest customers by far are ones that have their PACS and their VNA and we didn't run into a sole source customer that plans to replace them. They've also done a surprising job in retaining best-of-breed customers. Let's see if they can keep it up.

## CUSTOMER FEEDBACK

### SINGLE VENDOR

- 24% GOOD USABILITY
- 20% GOOD STABILITY/RELIABILITY
- 12% GOOD SUPPORT/SERVICE
- 8% GOOD FUNCTIONALITY
- 8% POOR FUNCTIONALITY
- 4% POOR USABILITY
- 4% GOOD INNOVATION
- 4% FAIR FUNCTIONALITY
- 4% POOR INNOVATION

### BEST-OF-BREED

- 20% GOOD INTEROPERABILITY
- 20% GOOD STABILITY/RELIABILITY
- 20% POOR FUNCTIONALITY
- 20% GOOD FUNCTIONALITY
- 10% GOOD USABILITY
- 10% POOR SUPPORT/SERVICE

### SINGLE SOURCE CUSTOMER FEEDBACK

Director of Radiology - " Philips works closely with my department and when we have issues they are quick to respond with mutually agreeable resolution. Great follow up and consistent in providing support."

Director of Radiology - " It's user friendly and contains multiple options for viewing flexibility."

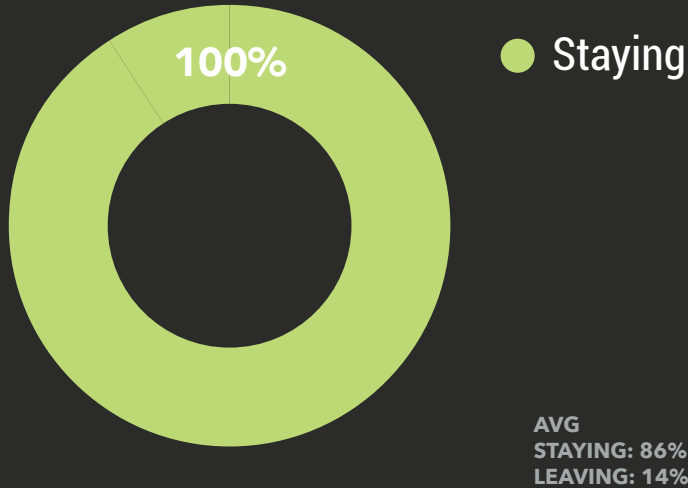
### BEST-OF-BREED CUSTOMER FEEDBACK

Director of Radiology - "They have good functionality, support, and widespread availability for continuation of patient care."

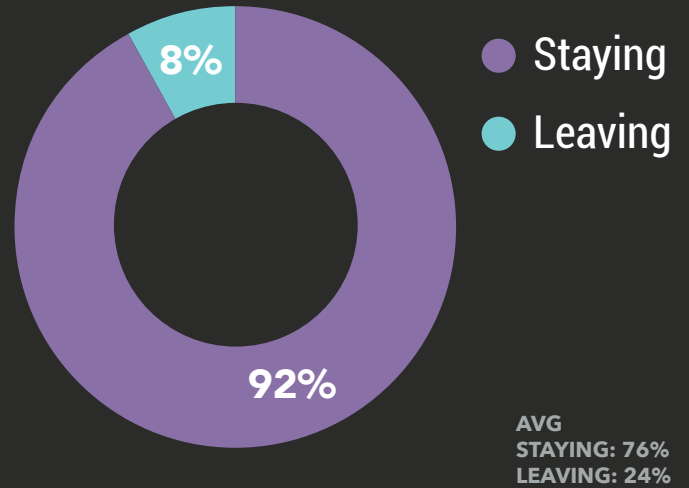
Chief of Diagnostic Imaging - "I appreciate their reliability, functionality, and ability to integrate with Primordial."

# REPLACEMENT RATES

## SINGLE SOURCE



## BEST-OF-BREED



# WINNING BUSINESS

## SINGLE SOURCE

of those looking for a new single source vendor,  
**20%**  
say Change is their top choice

## BEST-OF-BREED

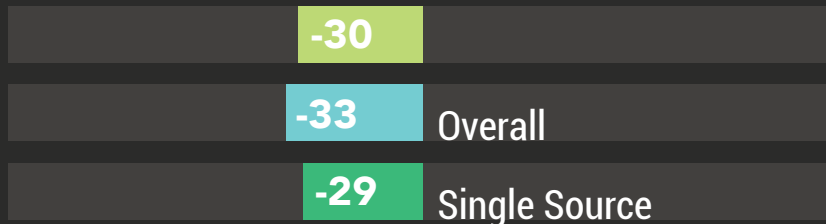
of those looking for a new PACS or VNA,  
**12%**  
say Change is their top choice

Philips is the third largest company represented in our data set with 11.3% of imaging leaders using it. Philips did very well in NPS ratings relative to its closest competitors. Users said a lot of good things about Philips, mentioning how the system is very user friendly, with support quickly assisting when issues arise. A small percentage of users mentioned how the system was missing features that other vendors offered. Philips needs to continue to accelerate its innovation cycles so as to not lose momentum in the market.

# OTHER VENDORS COVERED

## Carestream

### CUSTOMER SATISFACTION (NPS)



### CUSTOMER COMMENTS

Director of Radiology - "Reliable system, good service, functionality."

Director of Radiology - "The platform has great functionality."

## WINNING BUSINESS

### SINGLE SOURCE

of those looking for a new single source vendor,

**7%** say Carestream is their top choice

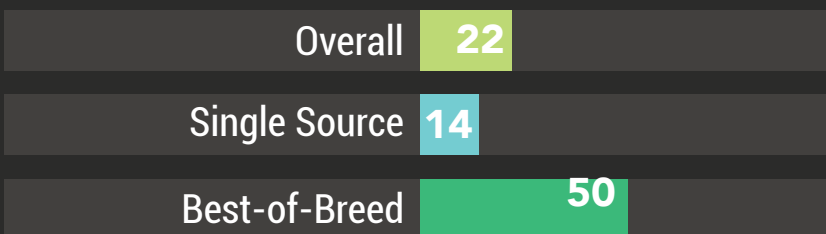
### BEST-OF-BREED

of those looking for a new PACS or VNA,

**10%** say Carestream is their top choice

## Sectra

### CUSTOMER SATISFACTION (NPS)



### CUSTOMER COMMENTS

Director of Radiology - "They are constantly working on new ideas for image management and everything else related to Radiology."

Imaging Services Systems Supervisor - "Sectra works well with other RIS systems. It's easy to use and if setup correctly it can be your VNA."

## WINNING BUSINESS

### SINGLE SOURCE

of those looking for a new single source vendor,

**7%** say Sectra is their top choice

### BEST-OF-BREED

of those looking for a new PACS or VNA,

**10%** say Sectra is their top choice

# OTHER VENDORS COVERED

## Intelerad

### CUSTOMER SATISFACTION (NPS)



### CUSTOMER COMMENTS

Radiologist - "It's been a huge improvement over our prior PACS."

Medical Imaging Manager - "The overall performance of Intelerad is solid."

## WINNING BUSINESS

BEST-OF-BREED

of those looking for a new PACS or VNA,

**6%**

say Intelerad is their top choice

## NovaRad

### CUSTOMER SATISFACTION (NPS)



### CUSTOMER COMMENTS

Director of Radiology - "They are very accessible and helpful in a timely manner."

## WINNING BUSINESS

SINGLE SOURCE

of those looking for a new single source vendor,

**3%** say NovaRad

is their top choice

BEST-OF-BREED

of those looking for a new PACS or VNA,

**2%** say NovaRad

is their top choice



# CONCLUSION

Trying to figure out what imaging solution configuration (single source or best-of-breed) is reminiscent of the saying “fashion is fickle”. Sometimes having one throat to choke is in vogue, while other times the radiology department just wants the best tool for the job.

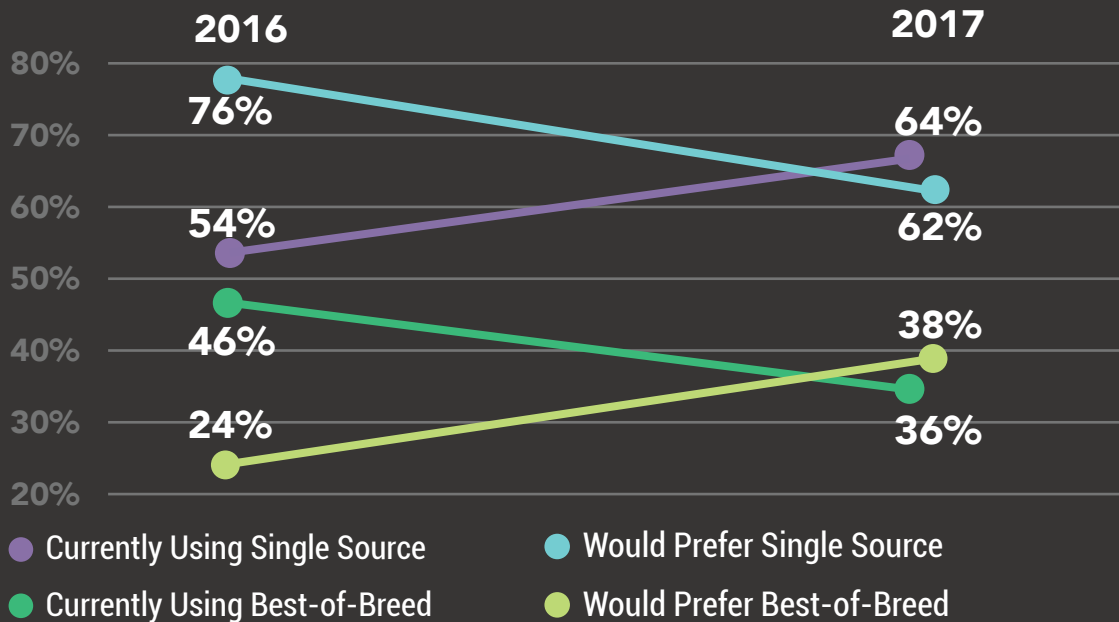
The advantages of either approach are self-evident. The single source option provides efficiency – you have fewer vendors to deal with and less interfacing headaches. However, you may have to compromise on system usability.

The best-of-breed option allows you to use,

what should be, the best tool for each job leading to happier end users. Drawback to this is the occasional finger pointing between vendors when things go wrong, and having to spend more time interacting with your vendors.

What’s emerging in our research is that while single source continues to be the most popular option, there is a bit of buyer’s remorse (or grass-is-greener) going on...and best-of-breed vendors are doing the same thing – they continue to add more solutions to their portfolio. Everyone’s still trying to figure out who they’re going to be when they grow up and this will probably never change.

## IMAGING STRATEGY PREFERENCE VS ACTUAL (TRENDED)



At the end of the day, however, each vendor needs to do an in-depth analysis of its happiest customers and then profile those customers so they can do a better job narrowing the types of organization they can best serve. Trying to sell to anyone who will pay you is not a sound business strategy, yet it is something that almost every vendor does. It’s just too hard to

let money pass you by. Simply put, there is no one imaging solution configuration that is ideal for everyone. All that matters is picking the configuration and vendor mix that is right for your organization. Oh, and avoid the tendency to look over the fence all the time at what the neighbors are doing...you’ll be happier if you don’t.

# PARTICIPATING ORGS

Adams Memorial Hospital  
Advanced Radiology Consultants  
Adventist Health  
Alameda Health System (FKA:  
Alameda County Medical Center)  
Anderson Regional Medical  
Center - South Campus  
Arizona Spine & Joint Hospital  
Aspirus Riverview Hospital &  
Clinics  
Aspirus Wausau Hospital  
Aurora BayCare Medical Center  
Aurora Medical Group, Inc.  
Aurora Sinai Medical Center  
Avista Adventist Hospital  
Baptist Hospital South  
Baylor University Medical Center  
Dallas  
Beaumont Hospital Trenton  
Ben Taub General Hospital  
Beth Israel Medical Center Kings  
Highway Division Brooklyn  
Beverly Hospital  
Billings Clinic Hospital  
BJC Healthcare  
Blanchard Valley Hospital  
Bon Secours St. Francis Medical  
Center  
Bon Secours Baltimore Health  
System  
Borden Medical Building  
Bryan W. Whitfield Memorial  
Hospital  
Buena Vista Regional Medical  
Center  
Cancer Specialists of North  
Florida  
Cardiovascular Institute of the  
South Lafayette  
CareMount Medical  
Carle Foundation Hospital  
Carolinas Medical Center -  
NorthEast  
Carson Tahoe Regional Medical  
Center  
Cass Regional Medical Center  
Catholic Health Initiatives  
Catskill Regional Medical Center

Centegra Hospital - Woodstock  
Centinela Hospital Medical Center  
Central Maine Medical Center  
Centura Health  
Charlotte Radiology  
Citizens Medical Center  
Cleveland Clinic Hospital  
CNOS  
Coffey County Hospital  
Colleton Medical Center  
Columbus Community Hospital  
Community Hospital  
Community Medical Center  
Cook County Corrections  
De Paul Health Center  
DeKalb Memorial Hospital  
DHHS PHS NAIHS Chinle  
Comprehensive Healthcare Fac  
Douglas County Memorial  
Hospital  
East Alabama Medical Center  
Eastern Health Regional Health  
Authority  
Electra Memorial Hospital  
Exempla Saint Joseph Hospital  
Ezras Choilim Health  
Ferrell Hospital  
Florida Orthopaedic Institute  
Floyd Memorial Hospital & Health  
Services  
Franklin Woods Hospital  
Froedtert Hospital  
Galion Community Hospital  
Glens Falls Hospital  
GMBC - Advanced Radiology  
Grafton City Hospital  
Graham Hospital  
Granite Falls Municipal Hospital  
Great Falls Clinic Medical Center  
Great River Medical Center  
Greenville Health System Laurens  
County Memorial Hospital  
Gulf Breeze Hospital  
Hamilton Medical Center  
Hampton Roads ENT  
Hampton VA Medical Center  
HAYS MEDICAL CENTER  
HCA Healthcare

Healthpark Medical Center  
Henry County Health Center  
Henry Ford Health System  
Highline Medical Center  
Hill Medical Corporation  
(Imaging)  
Hospital for Sick Children  
Indiana University Health Ball  
Memorial and Blackford Hospital  
INTEGRIS Baptist Medical Center  
Interfaith Medical Center - St.  
John's Hospital Division  
Intermountain Healthcare Inc  
IU Health University Hospital  
Jennie Stuart Medical Center  
Johns Hopkins Bayview Medical  
Center  
Kaiser Permanente (Health  
System)  
Laguna Honda Hospital &  
Rehabilitation Center  
Lakeland Regional Medical Center  
Lakeview Medical Center-WI  
Las Palmas Medical Center  
Laughlin Memorial Hospital  
Lawrence & Memorial Hospital  
LeConte Radiology PC  
Lancaster General Health  
Logansport Memorial Hospital  
Loretto Hospital  
Lourdes Hospital  
Lutheran Hospital  
Mahaska Health Partnership  
Main Line Health  
Mammoth Hospital  
Maria Parham Medical Center  
Marin General Hospital  
Martha B. Webber Breast Care  
Center  
Medical Center Hospital  
MedStar Union Memorial Hospital  
Memorial Hermann Texas  
Medical Center  
Memorial Hospital at Gulfport  
Memorial Hospital of Texas  
County  
Mercy Harvard Hospital  
Miami Valley Hospital

# PARTICIPATING ORGS

MidMichigan Medical Center -  
Gladwin  
MINW  
Mission Hospital  
Missouri Baptist Medical Center  
Monongalia General Hospital  
Morristown Medical Center  
Mount Ascutney Hospital &  
Health Center  
Mountain View Hospital  
Muleshoe Area Medical Center  
Nevada Regional Medical Center  
North Valley Hospital  
Novant Health  
NewYork–Presbyterian Hospital  
Ogden Regional Medical Center  
Oklahoma State University  
Olathe Medical Center  
OSF Saint Francis Medical Center  
Peoria aka OSF Healthcare  
System  
Ozarks Medical Center  
Park Nicollet Methodist Hospital  
Parkland Health and Hospital  
Systems  
Parkland Memorial Hospital  
Pearl River County Hospital  
Pineville Community Hospital  
PinnacleHealth Imaging -  
Dillsburg  
Prairie Lakes Hospital & Care  
Center  
Premier Diagnostic Imaging  
Premier Surgical Institute  
Promedica Monroe Regional  
Hospital  
Promise Hospital Of Louisiana  
PVHC Digital Radiology - Chino  
Hills  
Queens Medical Center -  
Punchbowl  
Rancho Los Amigos  
Range Regional  
Regional Medical Center Anniston  
Research Medical Center  
Ridgeview Medical Center  
Riverside Medical Center  
RMC Imaging

Robinson Memorial Hospital  
Rolling Plains Memorial Hospital  
Roper St. Francis CareAlliance  
Sacred Heart Hospital On The  
Emerald Coast  
St. Agnes Hospital  
St. Francis Hospital  
St. Francis Medical Center  
Salem Regional Medical Center  
Samaritan Hospital  
San Francisco General  
San Juan Regional Medical  
Center  
Sanford Aberdeen Medical Center  
Sanford Health - Fargo  
Santa Barbara Cottage Hospital  
Saunders Medical Center  
Schoolcraft Memorial Hospital  
Seattle Children's Hospital  
Self Regional Healthcare  
Sentara Princess Anne Hospital  
Shady Grove Adventist Hospital  
Sharp HealthCare  
Shoshone Medical Center  
Shriners Hospital - Cincinnati  
Sky Lakes Medical Center  
South Shore Hospital  
Southeast Colorado Hospital  
St. Anthony Community Hospital  
St. Vincent Health System (AR)  
St. Joseph Hospital  
St. Joseph Mount Sterling  
St. Mary's Hospital  
St. Mary's Regional Medical  
Center  
St. Vincent Hospital  
Summa St. Thomas Hospital  
Summerville Medical Center (HCA  
/ Trident)  
Summit Medical Group  
Sweetwater Hospital  
Tahoe Forest Health System  
Taos Health Systems  
Terre Haute Regional Hospital  
Texas Children's Hospital  
The University of Maryland  
Rehabilitation and Orthopaedic  
Institute

ThedaCare Regional Medical  
Center  
Thibodaux Regional Med Ctr  
Trinity Hospital  
Tuality Community Hospital  
UK Good Samaritan Hospital  
Union General Hospital  
United Hospital  
UnityPoint Health - Allen Hospital  
University Health Monroe  
University Hospitals of Cleveland  
University Medical Center  
Brackenridge a member of Seton  
Healthcare Family  
University of Cincinnati Medical  
Center  
University of Maryland St. Joseph  
Medical Center LLC  
University of Michigan Health  
System  
University of Mississippi  
University Of Missouri Health  
System  
VA  
VA Boston  
VA Jackson  
Vanderbilt University Hospital  
Virtual Radiology  
Wake Forest Baptist Health  
Walla Walla Clinic  
Wayne County Hospital  
Wayne Memorial Hospital  
Wesley Medical Center & Galichia  
Heart Hospital  
West Branch Regional Medical  
Center  
White Memorial Medical Center  
William Beaumont Hospital  
Willis Knighton Health System  
York Hospital - Wellspan Health

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