MARKET OVERVIEW

Hospital Radiology PACS (RPACS) Applications
2008
Year End Report
Three-quarters of the hospitals have installed RPACS. Another two percent have immediate plans to purchase RPACS technology for the first time.
The majority of contracts for RPACS systems have been signed between 2002 and 2007 with the most contracts signed in 2005.
The installation rate of RPACS has continued to increased from 2007 to 2008.
A bit less than one third of the hospitals in 2007 installed this technology in the past year. Another six percent signed a contract for RPACS technology.
With the exception of digital mammography and orthopedic, more than half of the hospitals have installed RPACS across different modalities. CT and CR have the highest installation rate, followed closely by Ultrasound and MRI.

N = 5,166

Source: HIMSS Analytics™ Database
Among hospitals that have installed RPACS technology, most of the hospitals have installed between eight to ten modalities. This suggests that organizations are implementing a full compliment of modality applications with their RPACS acquisition strategy.
Summary of Installations

• 827 hospitals (16 percent) have installed software or signed a contract for software installation for all 10 modalities in radiology PACS.
• 954 hospitals (18 percent) have installed software or signed a contract for all the modalities with the exception of digital mammography.
• 880 (17 percent) have installed software or signed a contract for all the modalities with the exception of orthopedic.
• 1,068 hospitals (21 percent) do not use software in any for radiology PACS.
• The remaining 1,437 hospitals (28 percent) use software for several, but not all, modalities defined in this report.

N = 5,166

Source: HIMSS Analytics™ Database
## Hospital Radiology PACS
### Top 10 Installed and Contracted Systems

<table>
<thead>
<tr>
<th>Vendor</th>
<th># of Installations</th>
<th>% of Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>GE HEALTHCARE</td>
<td>942</td>
<td>23.34%</td>
</tr>
<tr>
<td>MCKESSON PROVIDER TECHNOLOGIES</td>
<td>571</td>
<td>14.15%</td>
</tr>
<tr>
<td>PHILIPS MEDICAL SYSTEMS</td>
<td>407</td>
<td>10.08%</td>
</tr>
<tr>
<td>FUJIFILM MEDICAL SYSTEMS</td>
<td>404</td>
<td>10.01%</td>
</tr>
<tr>
<td>AGFA-GEVAERT GROUP</td>
<td>302</td>
<td>7.48%</td>
</tr>
<tr>
<td>SIEMENS MEDICAL SOLUTIONS</td>
<td>227</td>
<td>5.62%</td>
</tr>
<tr>
<td>NOVARAD CORPORATION</td>
<td>177</td>
<td>4.39%</td>
</tr>
<tr>
<td>DR SYSTEMS, INC.</td>
<td>129</td>
<td>3.20%</td>
</tr>
<tr>
<td>EMAGEON</td>
<td>129</td>
<td>3.20%</td>
</tr>
<tr>
<td>AMICAS</td>
<td>120</td>
<td>2.97%</td>
</tr>
</tbody>
</table>

56 Vendors share the remaining 22.40% of the market.

N = 4,036

Source: HIMSS Analytics™ Database

© 2009 HIMSS Analytics
Among those who mentioned that they plan to purchase, over half are planning CT and MRI and almost half are planning Ultrasound, CR and Digital Mammography. Additionally, over two-thirds are planning DR, DF and Nuclear Medicine.
Almost two-thirds of the hospitals mentioned that they plan to sign a contract for RPACS technology within the next 12 months. However, more than a quarter mentioned that they will defer this purchase decision for 12 and 18 months.
Contact HIMSS Analytics

Phone: 877-364-2500

Fax: 312-638-9401

Email: info@himssanalytics.org

Web: www.himssanalytics.org