Enabling better health through information technology.
Telemedicine Study Introduction

The concept of telemedicine - meaning the transfer of medical information via telecommunication (both synchronous and asynchronous) technology or specially designed medical devices for the purpose of delivering healthcare services and clinical information - is not new to healthcare. Healthcare organizations and clinicians have been doing this for years. But the level of data and the technology used to facilitate telemedicine has changed dramatically.

This research represents the fourth iteration of the telemedicine study. The trending information it contains highlights a positive outlook for the adoption of telemedicine to provide patient care and enhance physician communication while continuing to move technological advancements in the space forward. Whether urban or rural hospital, academic medical center or critical access facility, organizations are finding new and creative ways through telemedicine to offer new services and engage patients.

While the future direction of telemedicine is encouraging, it is not without hurdles. Many healthcare organizations have gone through a significant wave of IT investment and are not yet ready to add another technology that may alter physician workflow. Other organizations have yet to understand how reimbursement and liability pertains to telemedicine which is potentially slowing the rate of net investments.

Providing care through telemedicine technology may not be for everyone; each organization needs to evaluate what works best for them and their patient populations. However, with the move toward value versus volume, population health and more personalized care delivery, incorporating telemedicine solutions and services can offer benefits to physicians and patients not previously seen in healthcare.
Study Demographics

Methodological Approach: Web based survey
Dates of Data Collection: March 21, 2017 to April 6, 2017
Target Audience(s): C-Suite, IT professionals, clinicians, department heads
Number of Respondents: 136

Other 12%
Academic Medical Center or Urban hospital or health system 31%
Critical Access or Rural hospital or health system 57%

The 2017 Inpatient Telemedicine Study leverages data from web-based study respondents and from HIMSS Analytics LOGIC.

Methodological Approach: HIMSS Analytics LOGIC
Dates of Data Collection: March 31, 2017
Target Audience(s): U.S. Hospitals
Number of Respondents: 5,460

The demographic breakdown is similar to years past, with roughly 31 percent of study respondents self-identifying their organization type as an Academic Medical Center (AMC) or Urban hospital or health system, and roughly 57 percent of study respondents identifying themselves as Critical Access or Rural hospital or health systems.
Telemedicine Adoption
Do you currently utilize a telemedicine solution/service?

Definition: For the purposes of this study, Telemedicine is being defined as the transfer of medical information via telecommunication (both synchronous and asynchronous) technology or specially designed medical devices for the purpose of delivering healthcare services and clinical information.

Adoption of telemedicine solutions or services has surged since this study was first conducted in 2014 from roughly 54 percent in 2014 to 71 percent in 2017. After consistently growing 3.5 percent annually based on study results adoption has increased roughly 9 percent since 2016.

Additionally, the level of study respondents who were unsure if their organization utilized telemedicine solutions or services shrank significantly over the years, from nearly 18 percent in 2014 to just over 2 percent in 2017.

The increase in adoption and the decrease in the level of uncertainty from this most recent study signifies a clear indicator that healthcare organizations are working to incorporate new telemedicine technology and services to help facilitate patient care, communicate with clinical colleagues and provide patients and consumers better access to care.
The Hub and Spoke model for telemedicine still remains the most widely adopted and utilized model of care for telemedicine solutions and services. Participation in this model has remained in the 55 percent to 59 percent in the last three years. Additionally, patient portal usage has remained steady as well with adoption of a patient portal or an application-focused patient engagement services hovering around 47 percent to 49 percent in the last few years.

The most model growth over the last three years has been seen in the area of concierge services, with nearly 30 percent of respondents leveraging the model for their needs in 2017 versus 20 percent in 2015.
Telemedicine solutions/services leveraged

Which of the following telemedicine solution(s)/service(s) are currently utilized at your organization? (please select all that apply)

<table>
<thead>
<tr>
<th>Technology</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two-way video/webcam</td>
<td>80.0%</td>
<td>72.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>33.7%</td>
<td>38.1%</td>
<td>35.2%</td>
<td>35.5%</td>
</tr>
<tr>
<td>Image sharing technology</td>
<td>41.7%</td>
<td>46.1%</td>
<td>44.1%</td>
<td>45.3%</td>
</tr>
<tr>
<td>Video conferencing (group)</td>
<td>46.1%</td>
<td>55.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medication management</td>
<td></td>
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</tbody>
</table>

Two-way video/webcam continues to be the most widely adopted technology that organizations are using to meet their telemedicine needs, up to 80 percent of study respondents versus 72 percent in 2016. The continued increase in this product area is significant when coupled with the decreases in email and video conferencing. As improvements are made to new technology and healthcare policies adapt to these enhancements, organizations will continue to find a way to leverage the usage of these technologies to provide better access in a more streamlined approach.
Potential shift in telemedicine investment driver

What was the primary driver for your organization’s investment in telemedicine solution(s)/service(s)?

DATA AND INSIGHT AVAILABLE IN PREMIUM ESSENTIALS BRIEF
Plans to invest grow, uncertainty remains high

Do you have any plans to invest in telemedicine solutions/services within the next 24 months?

DATA AND INSIGHT AVAILABLE IN PREMIUM ESSENTIALS BRIEF
Uptick in planned investment for mobile applications

Which of the following telemedicine solution(s)/service(s) do you plan to consider? (please select all that apply)

DATA AND INSIGHT AVAILABLE IN PREMIUM ESSENTIALS BRIEF
HIMSS Analytics Toolkit

Health IT Actionable Insights

LOGIC™ Unique Relationships
Built collaboratively with Healthcare Organizations.

CapSite Industry Expertise
Contracts you need for transparency in pricing and effective go-to-market strategy.

Market Insight Deep Data
Proprietary data blended with the best available partner sources and data exhaust.

Advisory Services Consultative Insight
More than just theory. Executive insights.

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We drive the health IT market in the direction it needs to go

- **EMRAM**
  - EMR Adoption Model

- **O-EMRAM**
  - Outpatient EMR Adoption Model

- **AMAM**
  - Analytics Maturity Adoption Model

- **CCMM**
  - Continuity of Care Maturity Model

**Improved Patient Care and Health IT Insights**
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Highlights from the 2017 Inpatient Telemedicine Study include:

- Trending telemedicine data from 2014 to 2017
- Current and future adoption rates of telemedicine solutions/services
- Insight into dedicated virtual care facility construction

Purchase the Study