


FACT FILE

Imaging Trends

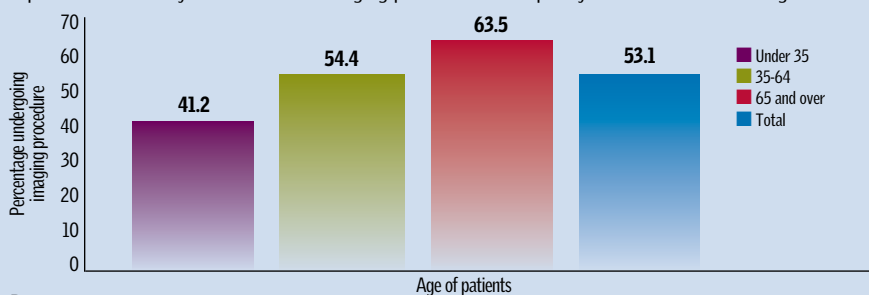
The advent of advanced imaging technology has limited the invasiveness of many medical procedures, improved disease prevention and saved lives. Imaging growth has been particularly pronounced outside of the hospital setting; one study shows growth at freestanding sites is outpacing the increase in imaging procedures at both hospital outpatient and inpatient sites. But the increased usage of

high-tech imaging devices has also contributed to rising costs in the healthcare industry; a BlueCross BlueShield of Tennessee report indicates high-tech imaging constitutes only 20 percent of all diagnostic imaging procedures but 60 percent of the costs. As the baby boom generation continues to age, the need for MRIs, CT scans and other imaging procedures will only grow. 

IMAGING DEMOGRAPHICS

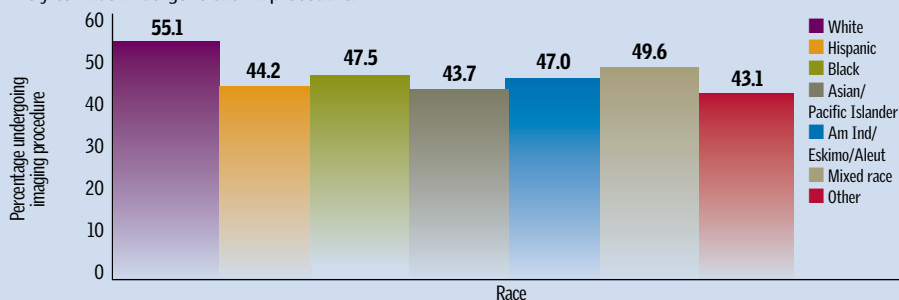
Age

Data from the 2006 Thomson PULSE Healthcare Survey reveal that the likelihood of having an imaging procedure--excluding dental procedures--increases steadily with age. Those 65 and older are approximately 50 percent more likely to have had an imaging procedure in the past year than those under age 35.



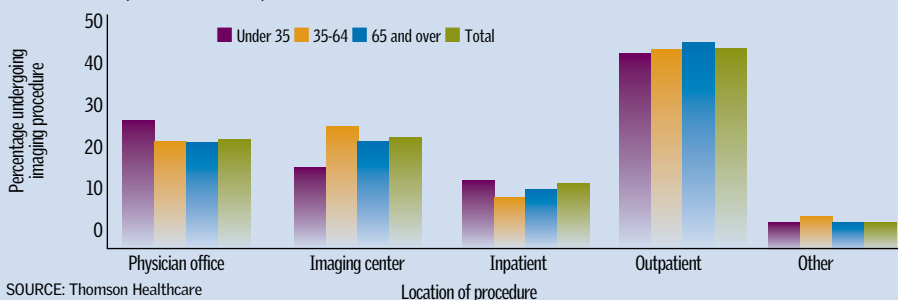
Race

The same survey shows that whites were significantly more likely to have undergone an imaging procedure within the previous 12 months than any other sub-group, while Asians and Hispanics were among the least likely to have undergone such a procedure.



Location

Finally, the survey indicates that the vast majority of imaging procedures, across age groups, are conducted at hospitals on an outpatient basis.



SOURCE: Thomson Healthcare

IMAGING TRENDS

SEPTEMBER 2007

Imaging Fast Facts

- \$100 billion worth of imaging exams are performed every year in the United States.
- Within the practice of diagnostic imaging, high-technology devices account for just 20 percent of procedures yet account for 60 percent of total costs and 75 percent of medical inflation.
- The number of high-technology imaging procedures grew from 281 million in 2000 to 401 million in 2005—a 42 percent increase.
- The number of outpatient diagnostic imaging centers increased 38 percent between 2001 and 2005.

SOURCE: Source: BlueCross BlueShield of Tennessee, *High-Technology Imaging: What Does the Picture Actually Reveal?*

Diagnostic Deficiencies

Here are some common deficiencies cited in one Massachusetts health plan's diagnostic privileging inspections of imaging sites:

- No record transfer policy if office shuts down.
- No identification markers on film
- Film technique is poor
- No shielding floor plan present
- No collimation performed
- No written policy or procedure for fire safety
- No state radiation control monitoring
- No radiation exposure warning signs
- No quality control testing plan
- Physicist does not review shielding or floor plan
- Equipment not calibrated annually
- No infection control policy
- No "x-ray in use" signs

SOURCE: BlueCross BlueShield of Tennessee, *High-Technology Imaging: What Does the Picture Actually Reveal?*

Upcoming Topic:

- » Physician Demand

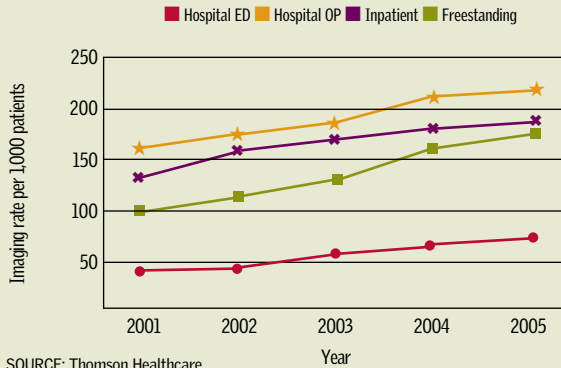
THOMSON 

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HOSPITALS' SHRINKING MARKET SHARE

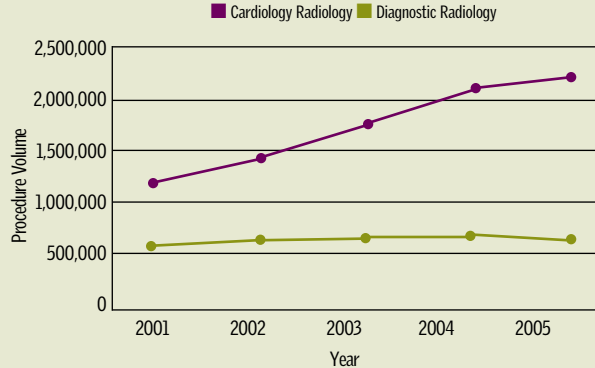
A Thomson Healthcare study of Medicare fee-for-service claims and enrollment data from 2001-05 reveals that imaging growth at hospital outpatient and inpatient sites is below average and indicates a loss of market share. Overall, hospital-based site growth is at 9 percent, while freestanding site growth is the highest, at 15 percent.



SOURCE: Thomson Healthcare

SPECT TREND

The same study reveals that diagnostic radiology dominates the increase in all areas of imaging except for single photon emission computed tomography (SPECT). For SPECT imaging, cardiologists have rapidly gained market share, growing 16 percent annually in comparison to the 1 percent annual growth for radiologists.



UTILIZATION BY THE NUMBERS

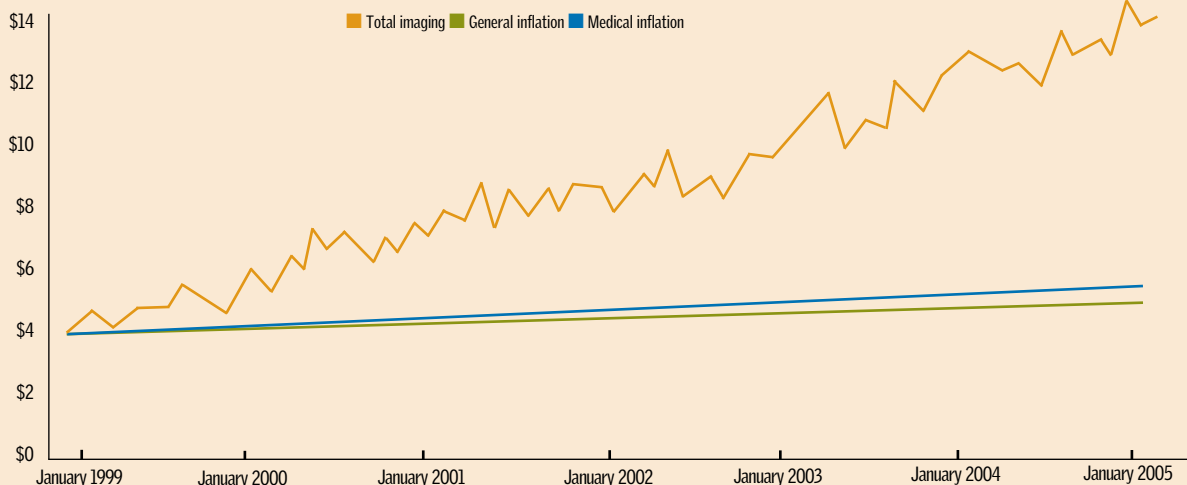
American College of Radiology statistics show that 2,003 diagnostic radiology procedures were performed per 1,000 people nationwide in 2005. The largest single modality was X-rays/mammography, with 294 million procedures performed.

Modality	Part B non HMO	All Medicare	All population	Per 1000 Persons
CT	20 million	23 million	69 million	230
MRI	7 million	8 million	23 million	76
Ultrasound	39 million	45 million	135 million	453
Interventional	9 million	11 million	32 million	106
Nuclear medicine	12 million	14 million	41 million	135
X-ray, mammography	84 million	98 million	294 million	991
Other	1 million	1 million	4 million	12
All diagnostic radiology	170 million	198 million	594 million	2,003
Radiation oncology	9.3 million	10.9 million	32.7 million	110

SOURCE: American College of Radiology

ONE STATE'S CASE STUDY

A BlueCross BlueShield of Tennessee study of spending for high-technology imaging mirrors national trends in cost increases. Between 1999 and 2005, total imaging costs for BCBST members increased from \$4.18 per member per month (PMPM) to \$12.71 PMPM—a total increase of 204 percent. Medical inflation, meanwhile, increased roughly 17.2 percent.



SOURCE: BlueCross BlueShield of Tennessee, *High-Technology Imaging: What Does the Picture Actually Reveal?*

