



MARKET MONITOR™ Notes

DECENTRALIZED TESTING METHODS

Information Dynamics

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Introduction

MARKET MONITOR™ Notes are summary publications that focus upon a particular issue or discipline within the diagnostic industry. The data for this Notes is taken from the 2006 Decentralized Testing MARKET MONITOR™. This issue of MARKET MONITOR™ Notes addresses one of several topics presented in this MONITOR™.

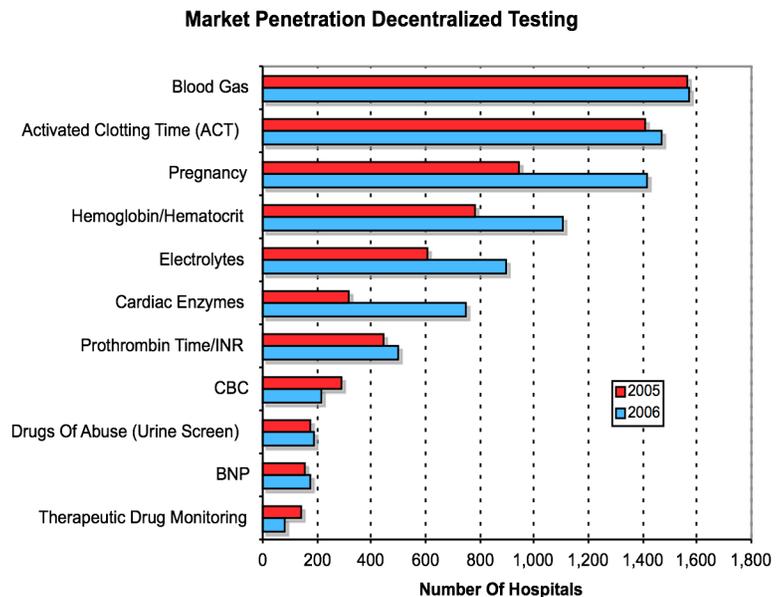
Specifically we are presenting the market penetration of decentralized testing methods by test group. How many institutions perform tests groups such as blood gas or cardiac enzymes at a location outside of the primary laboratory? How many hospitals offer near patient testing for a list of 11 different test groups?

Market Penetration – Decentralized Testing

The following chart illustrates the penetration of the hospital market with regard to decentralized testing. We consider decentralized testing to be any testing that is conducted outside of the main hospital core laboratory. This study goes beyond point of care testing conducted near patient to also include testing in the STAT laboratory that is physically separate from the primary laboratory. Data for this study was captured by the unit in which the testing is conducted so it is possible to look at only the point of care testing performed at the functional unit level, or combine any cluster of units to refine the working definition of the market. For the purposes of the following top line summary, we are looking at all decentralized testing adding the STAT labs and the unit level near patient testing.

The chart presents the number of hospitals in which each test group is performed in at least one unit outside of the main laboratory. It should be noted that, in many cases, hospitals will offer decentralized testing in a number of different units. Data comparing this year with last year is presented to identify areas of growth. Test groups are presented according to the number of hospitals currently conducting each test group on a decentralized basis. The universe of hospitals reported in this study is 5,157 short term, acute care hospitals.

It can be seen that (1) blood gas, (2) activated clotting time (ACT), and (3) pregnancy are the leading test groups with more than one of every four hospitals offering each test group in a decentralized mode. A second tier of test groups with respect to market penetration includes (1) hemoglobin/hematocrit, (2) electrolytes, (3) cardiac enzymes, and (4) Prothrombin Time/IRN. Test groups with less than 6 percent market penetration include (1) CBC, (2) drugs of abuse, (3) BNP, and (4) therapeutic drug monitoring.



Cardiac enzymes represent the test group with the largest percent growth over the last year. This test group experienced a 137 percent growth in the number of hospitals performing these tests on a decentralized basis over this time period. Other test groups illustrating significant growth include (1) pregnancy, (2) electrolytes, and (3) hemoglobin/hematocrit. The number of institutions performing CBCs and TDMs on a decentralized basis actually declined over the last year.

For more information on Point-Of-Care and Decentralized Testing, contact Information Dynamics at 610-692-5272 or info@infodyn.net.