

MEDICAL DEVICES & DIAGNOSTICS CENTRE OF EXPERTISE

2020 Capabilities



Introducing our expert Medical Devices & Diagnostics team

Part of the number one full-service global healthcare market research agency

Our Medical Devices & Diagnostics team is dedicated to improving healthcare outcomes through strategic and insightful research and consulting. We have functional expertise in helping our clients understand the market landscape and identify growth opportunities.

We ensure strategic insights and recommendations across the product lifecycle by combining the industry expertise of our MD&D specialists with best-in-class techniques in qualitative, quantitative, digital, human factors & user experience methodologies with patients, payors and healthcare professionals.

This full-service offering is supported through collaboration with specialist colleagues from Ipsos' broader healthcare team, including those in advanced analytics, market access & HEOR, data integration and advisory services teams.

Ipsos's MD&D team ensures you get global consistency by working collaboratively across 50 countries, both developed and emerging. Our global community ensures iterative learning, both on and off projects, bringing you the most actionable insights and recommendations to grow your presence.

With more than 15 years of experience and hundreds of MD&D projects conducted each year, it is not surprising that our existing client partnerships include all of the Top 20 MD&D clients.

We look forward to hearing from you and working together on your business needs!

What's inside



Understanding your business questions



Creating keys to your success



Orienting you to Ipsos and introducing our MD&D expertise



Powering your strategies with our Primary Market Research



Maximising your value story with our Market Access & HEOR



Driving your human-centred design with our Human Factors & Ux



Addressing your business optimisation with our Advisory Services



Enhancing your knowledge with our Pulse Reports



Immersing you in industry issues with our Thought Leadership

Providing insights to help answer your key business questions



WHAT ARE THE NEEDS/HOW CAN WE CREATE VALUE?

- What are the patient/clinical needs?
- What are the customer/HCP needs?
- What are the market trends/geographical needs?
- Who are the main players/competition and what do they offer/what do they lack?
- ... and more



HOW CAN WE CREATE SOMETHING UNIQUE/RARE?

- What device characteristics are needed to support the unmet needs/differentiate from competition?
- How do we design products that work better?
- How can we prove that our products work better?
- How should we prioritise clinical trial endpoints to deliver data that prescribers, payers and patients most value?
- ...and more



HOW DO WE GET ORGANISED?

- What regulatory and market access challenges/processes do we need to follow?
- What clinical data or real-world evidence will support our product launch?
- What is the optimal pricing and contracting strategy to ensure profitability, market value and volume?
- How can we measure the health of our brand and where to improve it?
- How do we make our sales force the most effective?
- ...and more

Supporting your success in the market



WE KNOW WHAT IT TAKES TO ORGANISE INTERNALLY FOR SUCCESS

- ✓ Change management is crucial-starting from creating urgency, forming a team, creating vision, communicating that vision, removing obstacles, create short-term wins, build on the change, anchor changes in corporate culture
- ✓ Know your products' strengths & weaknesses, what is unique, what adds value, what jobs do the products help your customers complete
- ✓ Identify how best to tell your customers about your products – which partners should you use to deliver information & influence
- ✓ Know your product portfolio and the financial implications of each offering/device
- ✓ Prioritise which channels (online/direct/indirect) to leverage to get purchases
- ✓ Ensure you have the right internal capabilities (expertise & manpower) to deliver relevant and competitive products and offerings – with timely and appropriate advice and to execute an effective sales strategy
- ✓ Ensure you have relevant marketing content and materials to support sales
- ✓ Ensure you have access to the right networks and partners




WE KNOW WHAT IT TAKES TO ORGANISE EXTERNALLY FOR SUCCESS

- ✓ Be ready for new growth opportunities and market changes by keeping on top of external assessment & market understanding; not just from your own customers' perspective or the spaces where you already play, but from non-customers and new segments
- ✓ Avoid bias in your understanding of the market by validating hypothesis from external sources, and conducting blinded/anonymous research
- ✓ Know your customer (what are their unmet needs, what jobs do they need to get done) & competition (what are their strengths & weaknesses) thoroughly
- ✓ Don't reinvent the wheel – use industry gold standard analysis and strategic frameworks to problem solve effectively
- ✓ But DO think differently by accessing a wide expertise set, not just from your own company or industry – this can boost innovative thinking
- ✓ Broaden your network to access different stakeholders from payors, to KOLs and other industry leaders
- ✓ Align your strategies and tactics with measurable KPIs which track success and growth
- ✓ Collect meaningful insights through well-designed research methods from observation of real-life scenarios, and uncovering deep emotional and behavioural drivers to quantification and advanced analytical techniques to robustly measure market opportunity (e.g. size, pricing, drivers of uptake, brand equity, etc.)

Introducing our Medical Devices & Diagnostics service expertise

Part of the number one full-service global healthcare market research agency



OUR SERVICES

CUSTOM/BESPOKE
MARKET RESEARCH

SYNDICATED


MARKET ACCESS
& HEOR

ADVISORY
SERVICES



OUR CENTRES OF EXPERTISE

PRODUCT LIFECYCLE	THERAPY INSIGHTS	MARKET KNOWLEDGE	INNOVATIVE SOLUTIONS
<ul style="list-style-type: none"> Commercial Strategy Launch Excellence Performance Optimisation Payer Marketing & Market Access Medical & HEOR Strategy 	<ul style="list-style-type: none"> Oncology Autoimmune Vaccines/Virology/Liver Diseases Rare Diseases Diabetes, Obesity & CV Respiratory 	<ul style="list-style-type: none"> Biopharma Industry Medical Devices & Diagnostics Connected Health Patient & Consumer Health Animal Health Compliance Multi-Stakeholder Access/Engagement 	<ul style="list-style-type: none"> Data Science & Advanced Analytics Multi-Source Data Solutions Digital Innovation/Social Intelligence/AI Qualitative Observation & Activation Behavioural Science Syndicated Real-World Data & Norms



OUR NETWORKS

1,000+
HEALTHCARE
EXPERTS

50+
COUNTRIES

GLOBAL
COMPLIANCE

CLIENT
ENGAGEMENT
PROGRAMMES

CONSUMER
INNOVATIONS

Our comprehensive Centre of Expertise provides end-to-end solutions

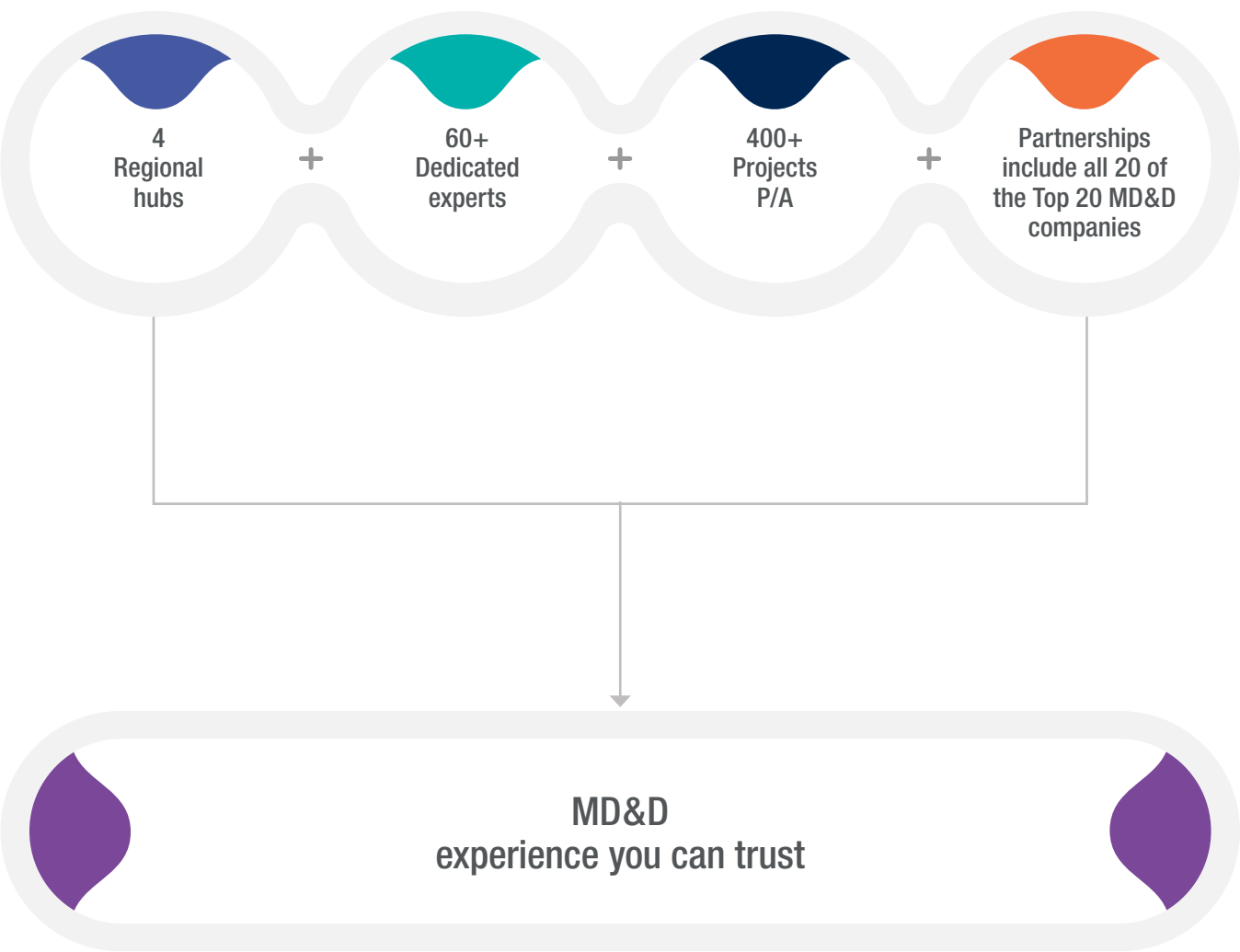


To more effectively address your evolving needs

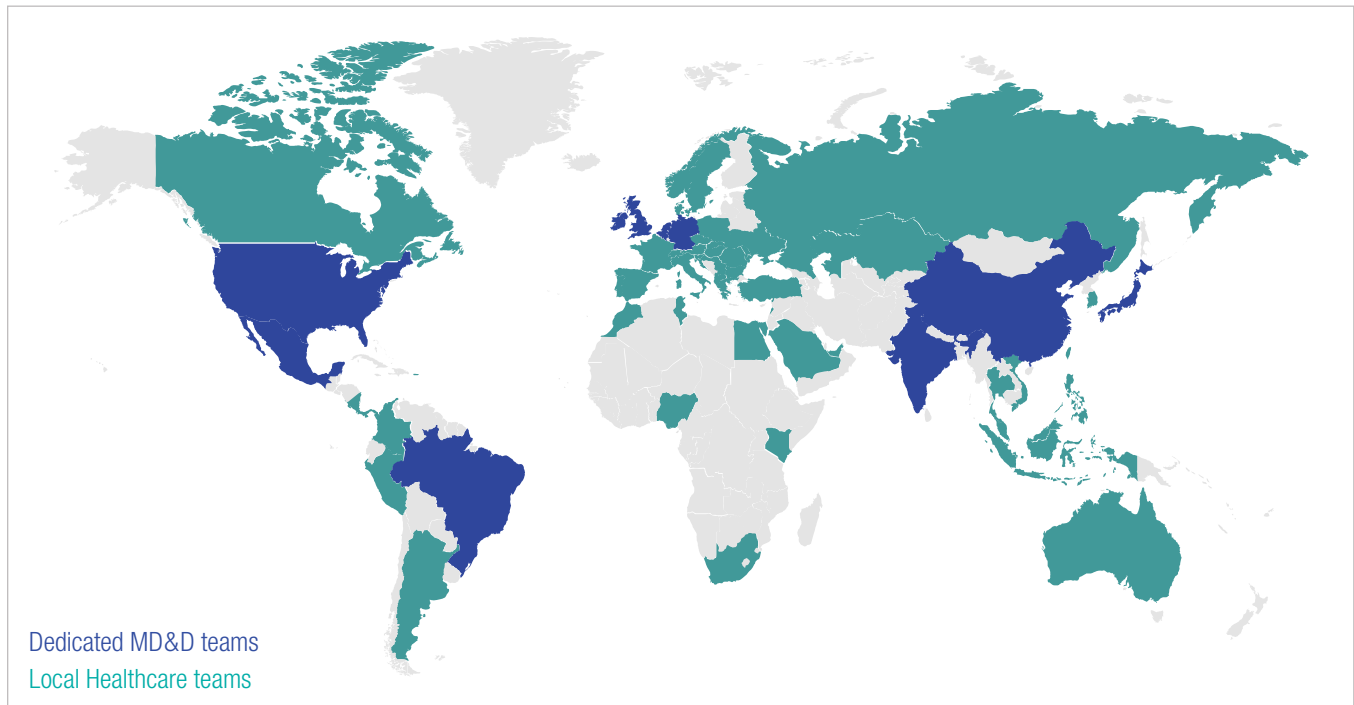


IPSOS PARTNERS STRATEGICALLY WITH MD&D CLIENTS, BRINGING MORE THAN 15 YEARS OF MD&D EXPERIENCE AND UNPARALLED RESOURCES

- Dedicated global team of medical technology specialists
- Extensive industry knowledge
- Market-leading expertise
- Global coverage



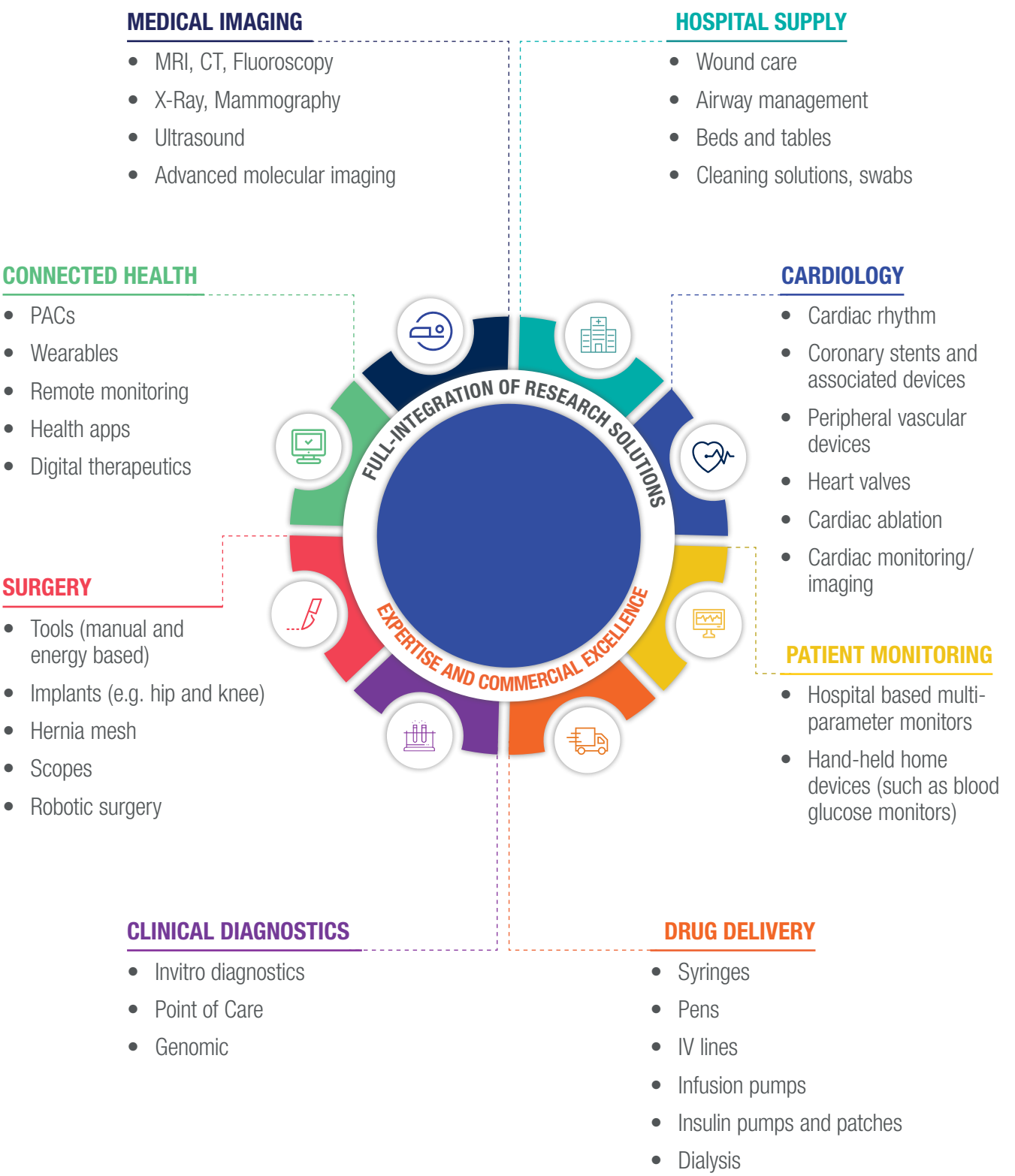
A focussed, highly experienced MEDICAL DEVICES & DIAGNOSTICS team



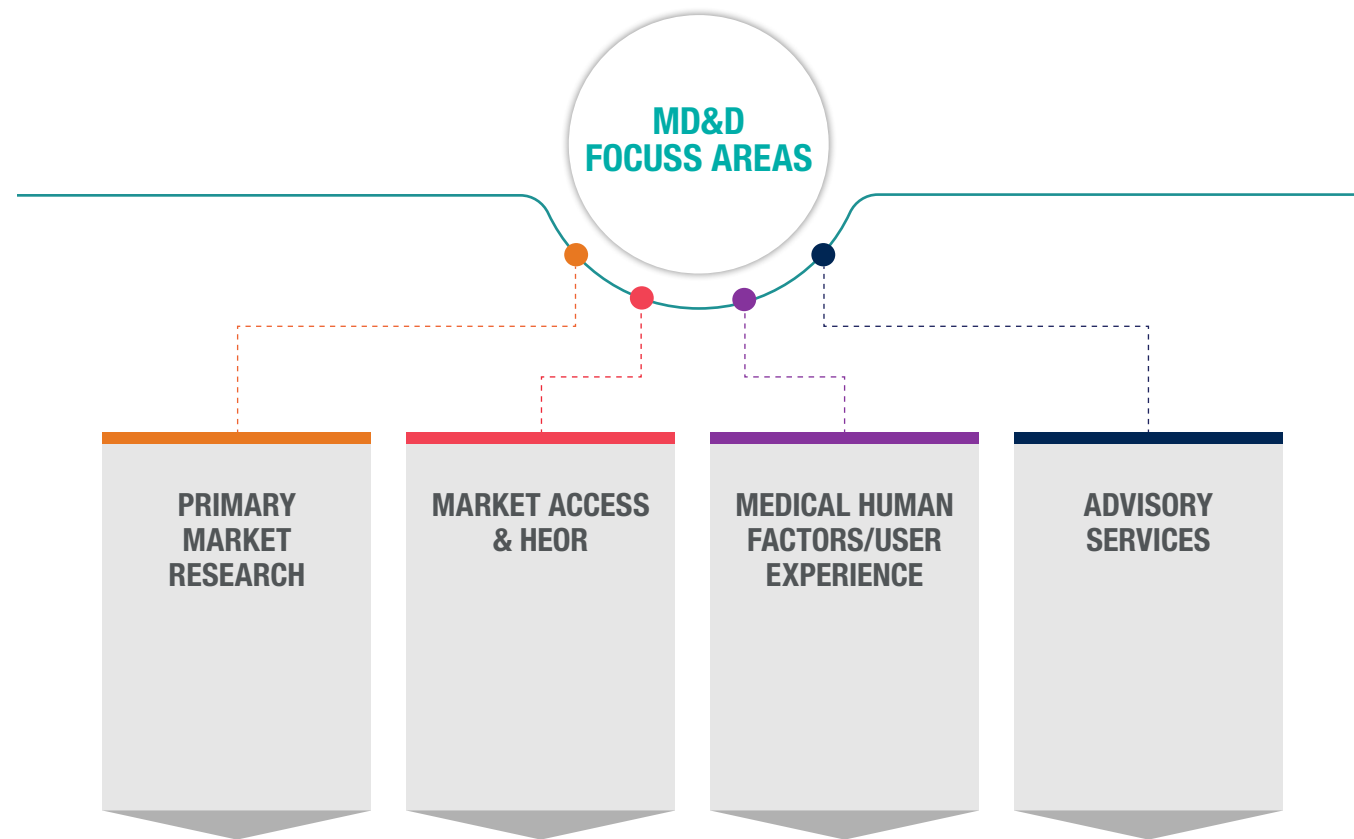
REGIONAL MD&D HUBS with dedicated leads in 10 countries				
US Nationwide		EU London (Regional Hub), Belgium and Munich	 	APAC Singapore (Regional Hub), China, India and Japan
			 	LATAM Mexico City and Sao Paulo

GLOBAL AND REGIONAL COORDINATION	LOCAL EXPERTISE
<ul style="list-style-type: none"> Organised regional hubs provide regional coordination and global consistency Highly experienced directors lead dedicated MD&D executive teams 	<ul style="list-style-type: none"> Partnering with Ipsos Healthcare experts in over 50 markets Ensuring methodologies and study materials are tailored appropriately to local market context

Complete coverage & expertise across a range of MD&D sectors



Powered by four core offerings



PRIMARY MARKET RESEARCH

Primary Market Research: Expertise across the complete product lifecycle

✓ COMMERCIAL STRATEGY

Market landscaping

- Stakeholder mapping
- Real-life decision making(HCP, Patient and Payer)
- Treatment algorithms
- Competitor footprint and performance
- Understanding unmet needs and market barriers

Market trends and drivers

🚀 LAUNCH EXCELLENCE

Value proposition/story refinement

- Launch strategy

Message positioning and performance

Price optimisation/willingness to pay

Concept evaluation and refinement

- Device prototype
- Marketing material

📈 PERFORMANCE OPTIMISATION

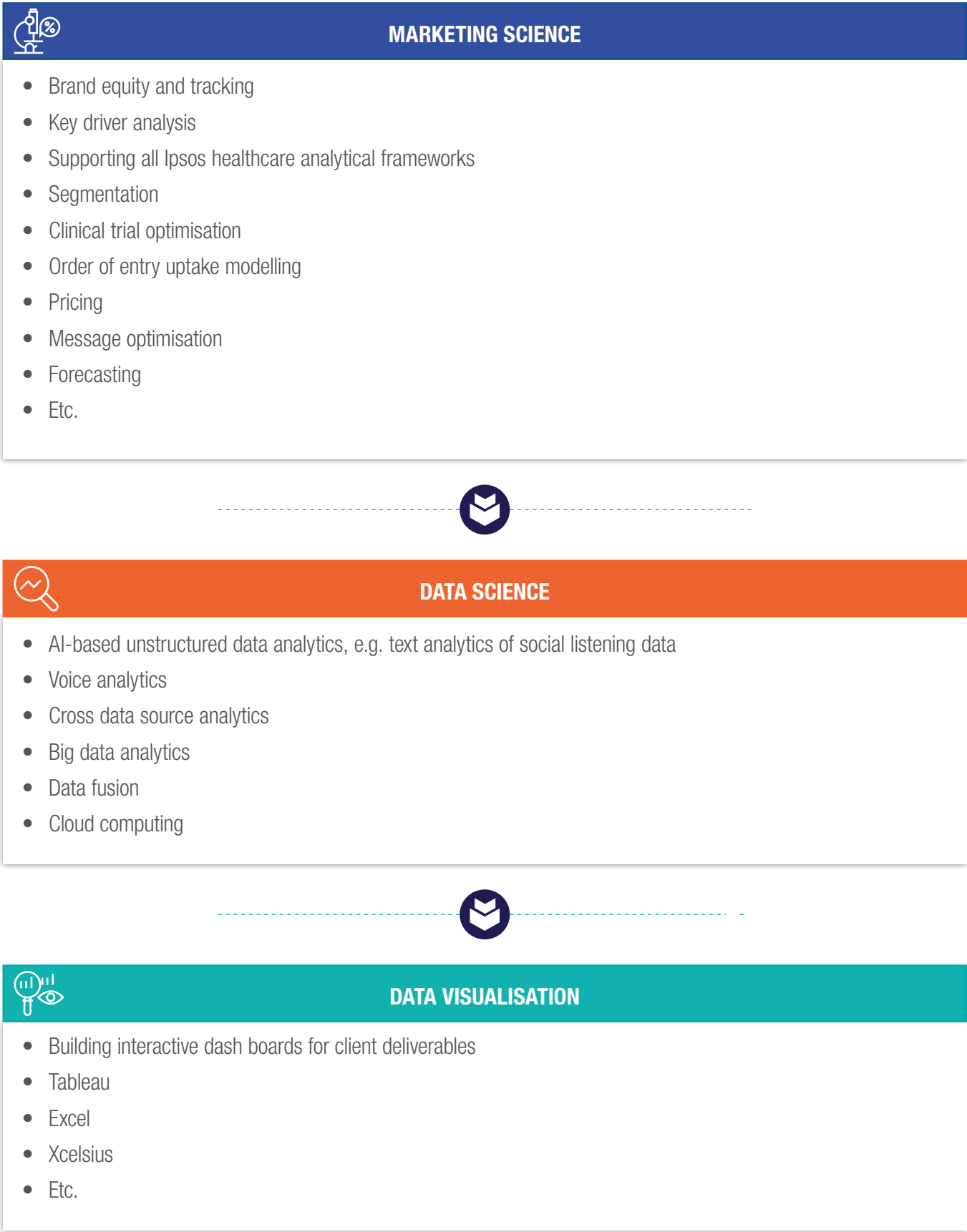
Brand health tracking

- Advertising and messaging effectiveness/tracking
- Brand/channel/corporate equity measurement and tracking

Customer experience/satisfaction

- Customer loyalty
- Value optimisation strategies
- Customer segmentation

Advanced Analytics Centre of Expertise: Offering focussed capabilities



MARKET ACCESS & HEOR

MD&D-focussed Market Access & HEOR practice,
supporting insights for your key business questions



CONCEPT

- What is the expected level of effort and risk to gain **reimbursement**?
- What is the **perceived value** of the intervention/diagnostic information?
- What are the likely non-clinical, care delivery and health economic **value proposition**/claims?
- What are the **core unmet needs** associated with the disease/product area?



FEASIBILITY

- Does **coding exist** and will **reimbursement** be sufficient?
- How will **payers/purchasers** (health plans, providers, facilities, etc.) view the technology? And what are their potential objections?
- What is the **competitive landscape** and where are there **opportunities for differentiation**?
- Which **asset(s) should be prioritised** and where does the strongest **commercial potential** lie?
- What potential **barriers to access** and reimbursement exist, and how can they best be addressed?



DEVELOPMENT

- What data will be required to support a positive **coverage policy**?
- What data will be required to support **premium pricing** (if desired)/our **value story**?
- Is there a need for **economic data** and/or **models to support value**?
- What **value messages** resonate most strongly, and how do messages vary by stakeholder type or segment?
- What is our **go-to-market access strategy**?



LAUNCH/POST LAUNCH

- Has **coding, coverage or reimbursement** impacted adoption of our product?
- What, if any, pushback have we received due to **pricing**?
- What are the **evidence development** needs post-launch; real-world data to support our value story?
- How do we communicate the **value story**?
- How do we **adapt the value story** as the market changes?

Supporting insights across the MD&D lifecycle



■ Evidence
■ HEOR
■ Market Access

*TRL: Technology Readiness Level

Leading the convergence of evidence, value & access



01 EVIDENCE GENERATION	02 VALUE COMMUNICATION	03 VALUE ASSESSMENT	04 VALUE JUSTIFICATION
<ul style="list-style-type: none">• Disease burden• Treatment experience, current SOC and unmet need• Technology development stages• Evidence requirements and gap assessment	<ul style="list-style-type: none">• Right story• Right data• Right way• Right time• Right stakeholders	<ul style="list-style-type: none">• Clinical• Economic• Patient relevant• Societal• Political	<ul style="list-style-type: none">• Clinical justification• Economic case• Affordability and WTP• Price, cost, budget impact and sustainability• Physician, patient & political pressure• Negotiation
Medical & HEOR strategy Diseases landscape assessment Primary cross-sectional & longitudinal research, e.g., registries Clinical, payer and multi-stakeholder insight and advisory boards RWE strategy Syndicated RWE studies	Market/stakeholder archotyping Physician, patient and payer segmentation Value message/story development Value message/story testing Value communication tools Publications Multi-channel engagement strategy	Core reimbursement dossiers Cost effectiveness, cost utility and budget impact modelling HTA submissions Health policy research Willingness to pay studies	Pricing and reimbursement strategy Launch pricing Negotiation and contracting strategy Negotiation toolkit development Innovative agreement and managed entry schemes
OUR EXPERTISE			

HUMAN FACTORS & USER EXPERIENCE

MD&D-focussed Human Factors & User Experience practice, supporting human-centred design

A CROSS-DISCIPLINE TEAM OF EXPERTS

Human Factors Engineers | Research Psychologists | Software Engineers | Bio-Medical Engineers | Nursing & Clinical Administration | Industrial Designers | Information Architects | HCI Experts

In excess of 25 advanced degrees (5 PhDs)

Experts in IEC 62366-1:2015, ANSI/AAMI HE75:2009 (R) 2013, and US FDA regulations

FDA PMTA ENDS guidance

ISO 9001 certified



Offering human-centred design across the MD&D lifecycle



WHAT WE OFFER

User needs identification/development | Digital, connected devices, mobile & web design | Device & platform evaluation/test | Usability & systems engineering support

Research, evaluation & design expertise throughout the development lifecycle

Global research In the lab, in the field, on the web

Global labs US, UK, China, Germany, Japan, South Korea, Australia

Full-service HF consulting from discovery through launch

Quality ISO 9001:2015 Certified

ADVISORY SERVICES



MD&D-focussed Advisory Services, offering go-to-market and business optimisation

OUR MAIN FOCUS

GO-TO-MARKET & BUSINESS-OPTIMISATION STRATEGY CONSULTING

COMPRISED OF

MARKET ASSESSMENT

- Market sizing & forecasting
- Competitive intelligence
- Customer segmentation
- Innovation scouting

INTERNAL DIAGNOSTICS

- Change management
- Strategic workshops
- Business unit strategy

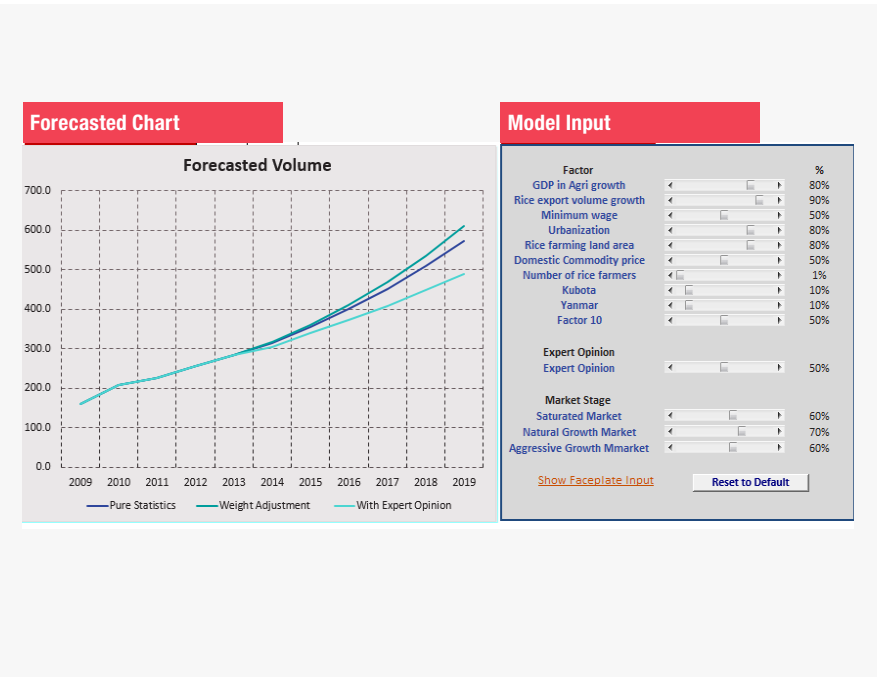
IMPLEMENTATION

- Market entry strategy
- Partner evaluation
- Operational efficiency
- Distribution/channel strategy

QUESTIONS ANSWERED

1. How do we make sure that the market entry strategy suits our business model and targeted customers?
2. How do we create a compelling value proposition addressing the needs of our customers?
3. What is the size of the potential opportunity in our specific market?
4. What should be our practical roadmap for the launching of our portfolio in our market?
5. How should we set our growth KPIs? Should we focuss our business strategy on growing market share, increasing penetration, or finding a new niche?
6. Which potential partners are best suited to help our business compete more effectively?

Market sizing & forecasting



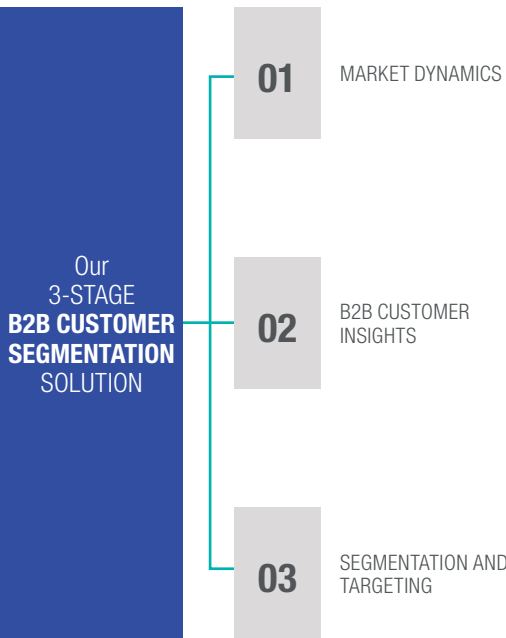
ADDRESSING KEY CLIENT QUESTIONS

1. How big is the overall market today?
2. How rapidly is it growing?
3. What segments are most interesting?
4. What substitute products and services are our potential customers currently using?
5. What are the long-term demand forecasts broken down by volume and price?
6. Who will be our main competitors?

B2B customer segmentation



A STEPWISE PROCESS OF SEGMENTATION so that your business can understand the universe of customer segments and identify the right segments to target

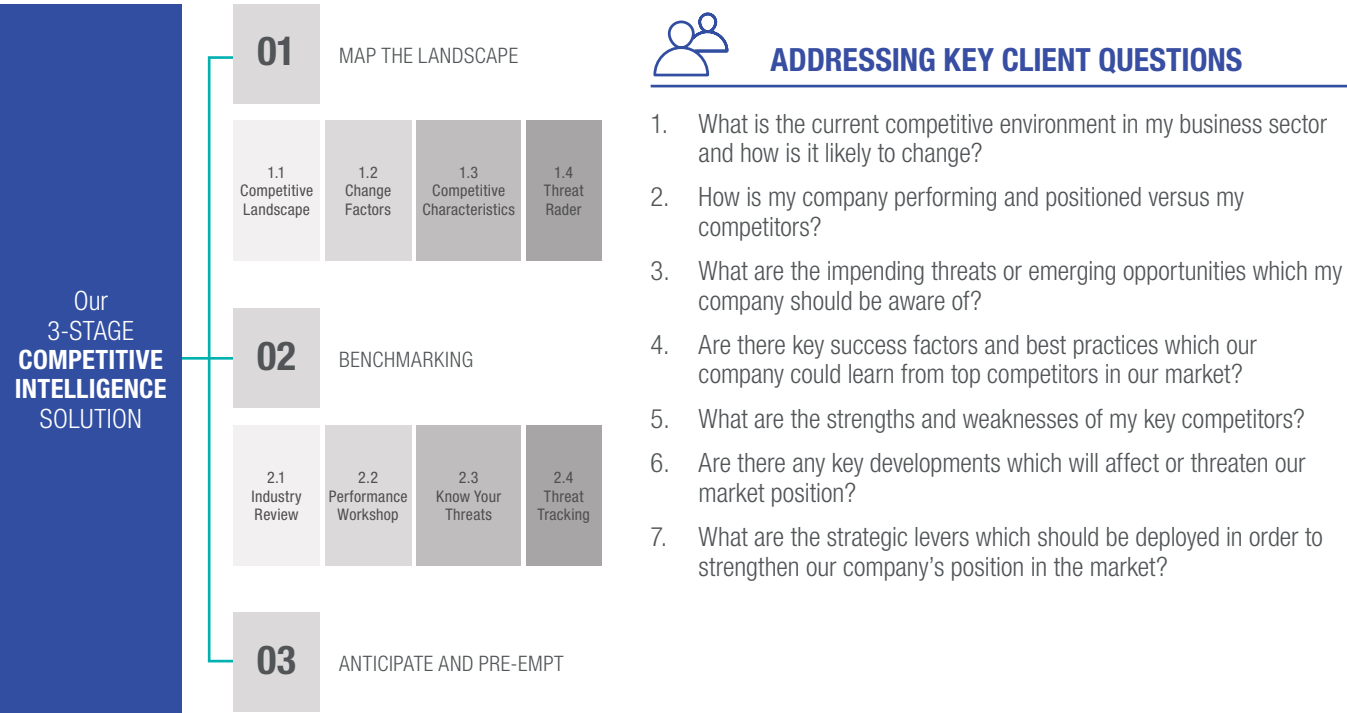


ADDRESSING KEY CLIENT QUESTIONS

1. How are developments in our business environment affecting the choices our customers make?
2. What factors affect our customers' decision-making processes? What do they think of our business and how can our business serve them better?
3. How can we define segments within our business customers? Which segments should our business prioritise?

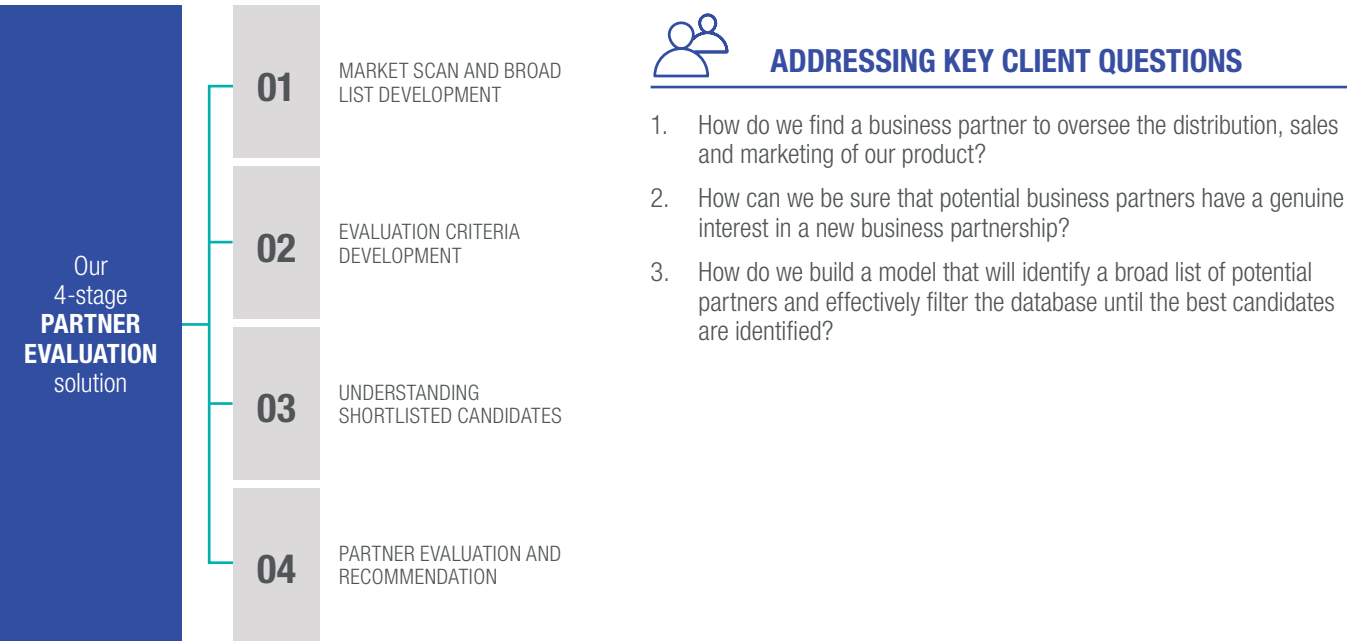
Competitive intelligence

 **WE PRIORITISE OPPORTUNITIES** that strengthen your existing positioning and identify strategic levers to counter competitive threats



Partner evaluation solution

 **PARTNER EVALUATION** is offered as a stand-alone service or as part of a go-to-market and business unit strategy solution



DATA & INSIGHTS



Providing relevant & timely MD&D data and insights through our quarterly Pulse Surveys

These can also be conducted on an ad-hoc basis for individual client needs

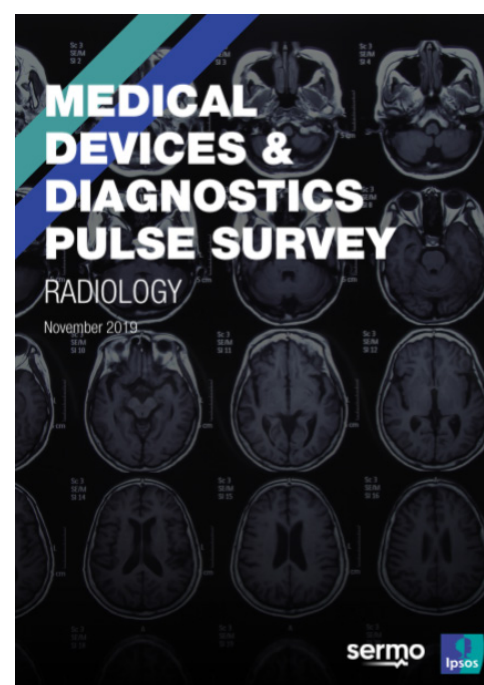


Ipsos partners with SERMO to conduct a series of Rapid Research pulse studies (Five minutes with 10-15 questions), each with a different group of healthcare professionals

Each pulse survey is fielded through SERMO's agile micro survey tool (SERMO RealTime) which has access to over 1.8 million healthcare professionals worldwide

Typically, 200-400 responses will be collected per study and depending on the therapy area will gather data from 7-10 countries, including both developed and emerging markets

Results turned around in 1-5 days, depending on scope



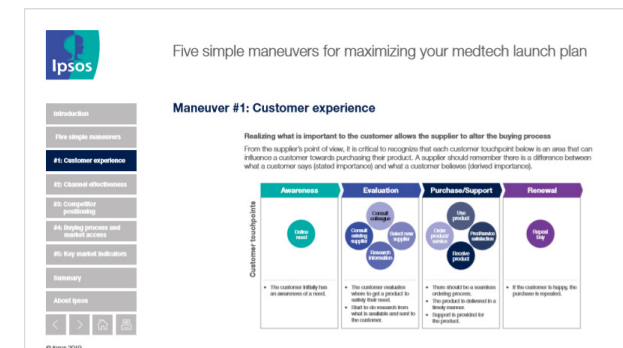
[Access an archive of current/previous reports from 2017 onwards](#)

Sharing thought leadership through webinars, white papers, best practices and use cases



2020 MD&D THOUGHT LEADERSHIP SAMPLE TOPICS

- Operating Room of the Future
- Digital Doctor
- Medical Human Factors



Meet our MD&D Regional Leads



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www.ipsos.com

 **Ipsos Healthcare**

 **ipsoshec**

About the Ipsos Healthcare Service Line

Ipsos' Healthcare Service Line partners with pharmaceutical, biotech and medical device manufacturers to inspire better healthcare. Operating in 50+ markets, our 1,000+ experts support key business decisions for our clients throughout the commercial lifecycle, from early-stage strategy, to launch, to performance optimization. We do this through a uniquely integrated combination of therapeutic and market expertise, gold standard real-world evidence and market-leading custom research approaches—all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.