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
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.)


### 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

Providing insights to help answer your key business questions

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

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Introducing our Medical Devices & Diagnostics service expertise

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**OUR SERVICES**

**CUSTOM/BESPOKE MARKET RESEARCH**

**SYNDICATED**

**MARKET ACCESS & HEOR**

**ADVISORY SERVICES**

**OUR CENTRES OF EXPERTISE**

**PRODUCT LIFECYCLE**
- Commercial Strategy
- Launch Excellence
- Performance Optimisation
- Payer Marketing & Market Access
- Medical & HEOR Strategy

**THERAPY INSIGHTS**
- Oncology
- Autoimmune
- Vaccines/Virology/Liver Diseases
- Rare Diseases
- Diabetes, Obesity & CV
- Respiratory

**MARKET KNOWLEDGE**
- Biopharma Industry
- Medical Devices & Diagnostics
- Connected Health
- Patient & Consumer Health
- Animal Health
- Compliance
- Multi-Stakeholder Access/Engagement

**INNOVATIVE SOLUTIONS**
- 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

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**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 unparalleled resources

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

4 Regional hubs + 60+ Dedicated experts + 400+ Projects P/A + Partnerships include all 20 of the Top 20 MD&D companies

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MD&D experience you can trust
A focused, highly experienced MEDICAL DEVICES & DIAGNOSTICS team

Global and Regional Coordination
- Organised regional hubs provide regional coordination and global consistency
- Highly experienced directors lead dedicated MD&D executive teams

Local Expertise
- 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

**MEDICAL IMAGING**
- MRI, CT, Fluoroscopy
- X-Ray, Mammography
- Ultrasound
- Advanced molecular imaging

**HOSPITAL SUPPLY**
- Wound care
- Airway management
- Beds and tables
- Cleaning solutions, swabs

**CONNECTED HEALTH**
- PACs
- Wearables
- Remote monitoring
- Health apps
- Digital therapeutics

**CARDIOLOGY**
- Cardiac rhythm
- Coronary stents and associated devices
- Peripheral vascular devices
- Heart valves
- Cardiac ablation
- Cardiac monitoring/ imaging

**SURGERY**
- Tools (manual and energy based)
- Implants (e.g. hip and knee)
- Hernia mesh
- Scopes
- Robotic surgery

**PATIENT MONITORING**
- Hospital based multi-parameter monitors
- Hand-held home devices (such as blood glucose monitors)

**CLINICAL DIAGNOSTICS**
- Invitro diagnostics
- Point of Care
- Genomic

**DRUG DELIVERY**
- Syringes
- Pens
- IV lines
- Infusion pumps
- Insulin pumps and patches
- Dialysis

**GLOBAL AND REGIONAL COORDINATION**

**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

Dedicated MD&D teams
Local Healthcare teams
Powered by four core offerings

MD&D FOCUS AREAS

PRIMARY MARKET RESEARCH
MARKET ACCESS & HEOR
MEDICAL HUMAN FACTORS/USER EXPERIENCE
ADVISORY SERVICES

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

MARKETING SCIENCE

- Brand equity and tracking
- Key driver analysis
- Supporting all Ipsos healthcare analytical frameworks
- Segmentation
- Clinical trial optimisation
- Order of entry uptake modelling
- Pricing
- Message optimisation
- Forecasting
- Etc.

DATA SCIENCE

- AI-based unstructured data analytics, e.g. text analytics of social listening data
- Voice analytics
- Cross data source analytics
- Big data analytics
- Data fusion
- Cloud computing

DATA VISUALISATION

- Building interactive dashboards for client deliverables
- Tableau
- Excel
- Xcelsius
- Etc.
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

<table>
<thead>
<tr>
<th>TRL* 1-3</th>
<th>TRL 4-9</th>
<th>Launch</th>
<th>Post-launch</th>
<th>Post-LOE</th>
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<tbody>
<tr>
<td>Asset due diligence &amp; forecasting input</td>
<td>Stakeholder archotyping &amp; segmentation</td>
<td>Evidence generation (outcomes &amp; trial design) planning</td>
<td>Pricing &amp; access strategy: Launch-to-loss of exclusivity (LOE)</td>
<td>Value message/story development</td>
</tr>
<tr>
<td>Real world evidence generation</td>
<td>HEOR &amp; HTA dossier</td>
<td>Contracting &amp; negotiation strategy</td>
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### Leading the convergence of evidence, value & access

#### 01 EVIDENCE GENERATION
- Disease burden
- Treatment experience, current SOC and unmet need
- Evidence requirements and gap assessment

#### 02 COMMUNICATION
- Right story
- Right data
- Right way
- Right time
- Right stakeholders

#### 03 ASSESSMENT
- Clinical
- Economic
- Patient relevant
- Societal
- Political

#### 04 JUSTIFICATION
- Clinical justification
- Economic case
- Affordability and WTP
- Price, cost, budget impact and sustainability
- Physician, patient & political pressure
- Negotiation

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**Our Expertise**

- **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

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*TRL: Technology Readiness Level*
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

Human Factors & User Experience
Offering human-centred design across the MD&D lifecycle

**DISCOVERY RESEARCH**
- Stakeholder interviews
- Discovery workshops
- User analysis

**STRATEGY & DESIGN**
- Prototyping
- Expert review
- Heuristic analysis
- Information architecture
- Visual design

**DESIGN EVALUATION (Formative Testing)**
- Performance based
- In-lab
- In-field/mobile
- Remote

**ITERATIVE DESIGN**
- Improvement based on user performance and hard data

**VALIDATION (Summative Testing)**
- Final validation the entire system is safe & effective

**POST MARKET**
- User & design specifications
- Instruction for use
- Training materials
- Interface implementation

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**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
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

MARKET SIZING & FORECASTING

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

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 INSIGHTS

01 MARKET DYNAMICS
02 B2B CUSTOMER SEGMENTATION SOLUTION
03 SEGMENTATION AND TARGETING

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 focus 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?
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

**ADDRESSING KEY CLIENT QUESTIONS**

1. How do we find a business partner to oversee the distribution, sales and marketing of our product?
2. How can we be sure that potential business partners have a genuine interest in a new business partnership?
3. How do we build a model that will identify a broad list of potential partners and effectively filter the database until the best candidates are identified?

Competitive intelligence

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

**ADDRESSING KEY CLIENT QUESTIONS**

1. What is the current competitive environment in my business sector and how is it likely to change?
2. How is my company performing and positioned versus my competitors?
3. What are the impending threats or emerging opportunities which my company should be aware of?
4. Are there key success factors and best practices which our company could learn from top competitors in our market?
5. What are the strengths and weaknesses of my key competitors?
6. Are there any key developments which will affect or threaten our market position?
7. What are the strategic levers which should be deployed in order to strengthen our company’s position in the market?
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

Access the webinar recording
Meet our MD&D Regional Leads

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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.