



Post-Pandemic Insights for Medtech

Market Outlook and Strategy
Recommendations for 2022



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Speakers



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Today's agenda

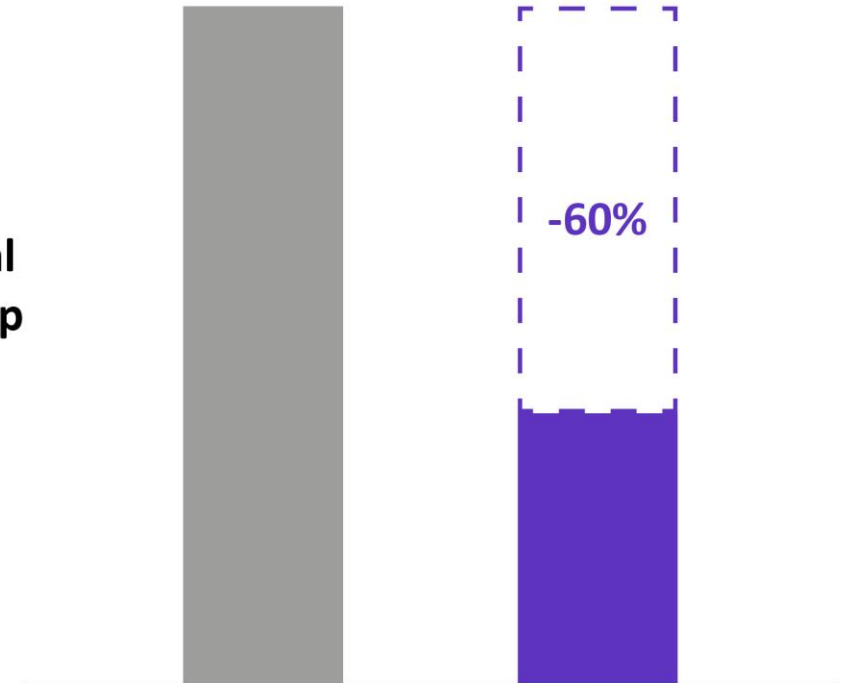
- 2020 impact on medtech
- Resolved and remaining challenges
- Procedural volumes
- Supply chain dynamics
- Opportunities that await
- Current and future market outlook
- Key predictions & strategy recommendations
- Today's takeaways



2020's acute and chronic impacts on medtech

- Procedural volumes dipped by as much as 60% as elective surgeries were put on hold
- Hospital staff fatigued and burned out
- Supply chain constraints and cost increases
- Clinical trial delays
- M&A slowdown at the start of COVID-19

**Procedural
volume dip**



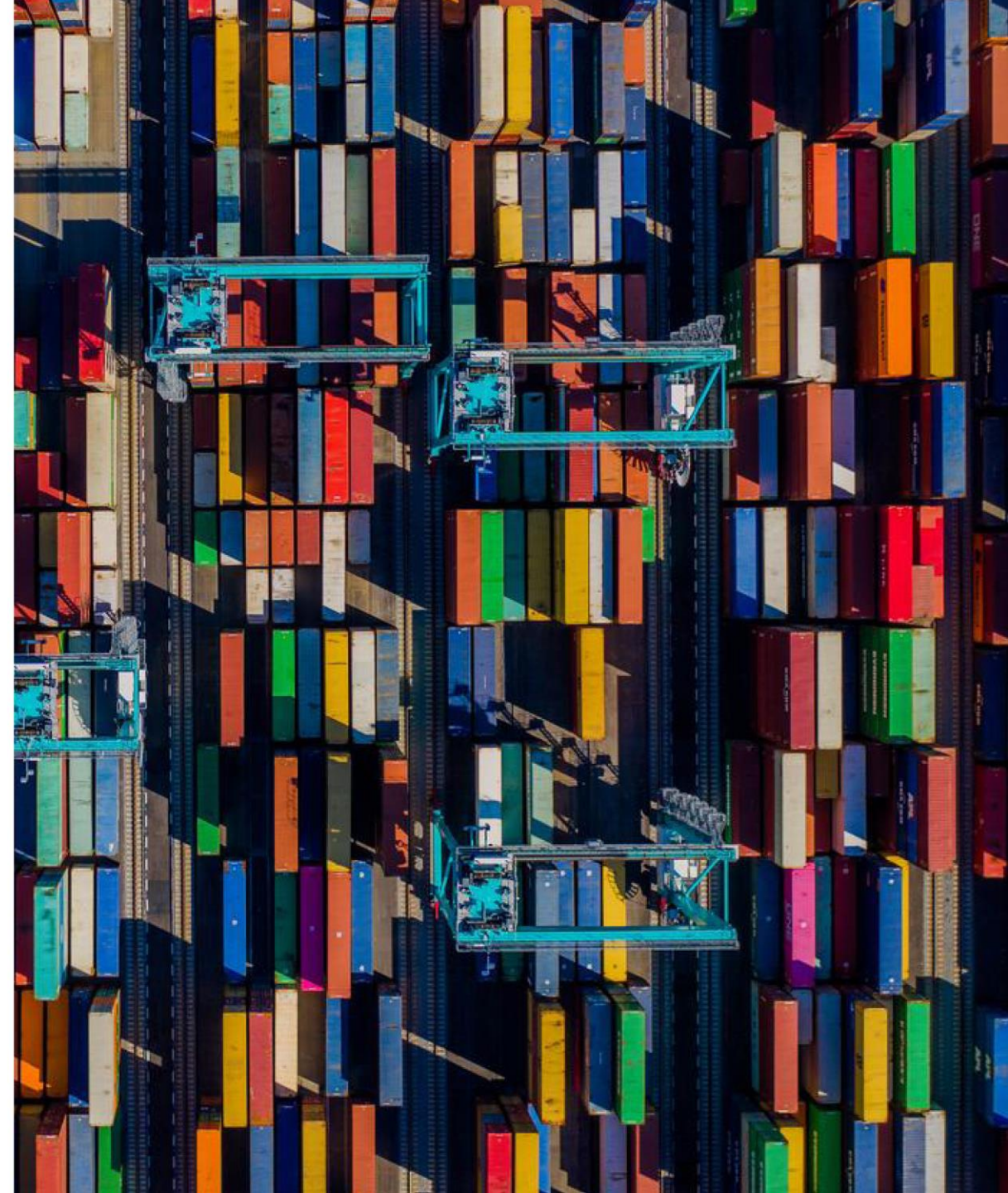
What has resolved – and what hasn't?

Resolved challenges

- Elective procedures are back
- M&A activity is thriving once again
- Clinical research is becoming more active

Remaining challenges

- Increases in procedural volumes haven't made up for pre-pandemic losses
- Healthcare workers are still fatigued
- Supply chain constraints are continuing



Patient and procedural volumes: then and now

Elective procedures

In order to absorb the loss of 2020's backlogs, hospitals would need to assume volumes that exceed pre-pandemic baselines. With current resource and staff pressures, that simply isn't possible.

Pre-pandemic
100%



■ 100%

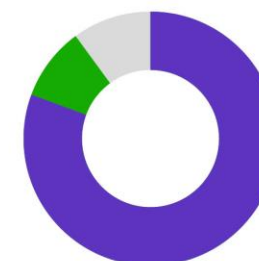
Spring 2020
40-60%



■ 40%

■ 60%

Now
80-90%



■ 80%

■ 90%

Supply chain concerns: then and now

- More demand, less supply, higher costs, and inflation are a recipe for ongoing challenges
- Waves of pandemic-related effects oscillate between extremes
- Importance of learning fast and responding fast



Opportunities coming out of COVID-19

- Compared to other industries, medtech will always be relatively stable
- Vaccine uptake gives new promise
- **Telemedicine, advanced tech, and data analysis are contributing to a more effective and personalized healthcare model**



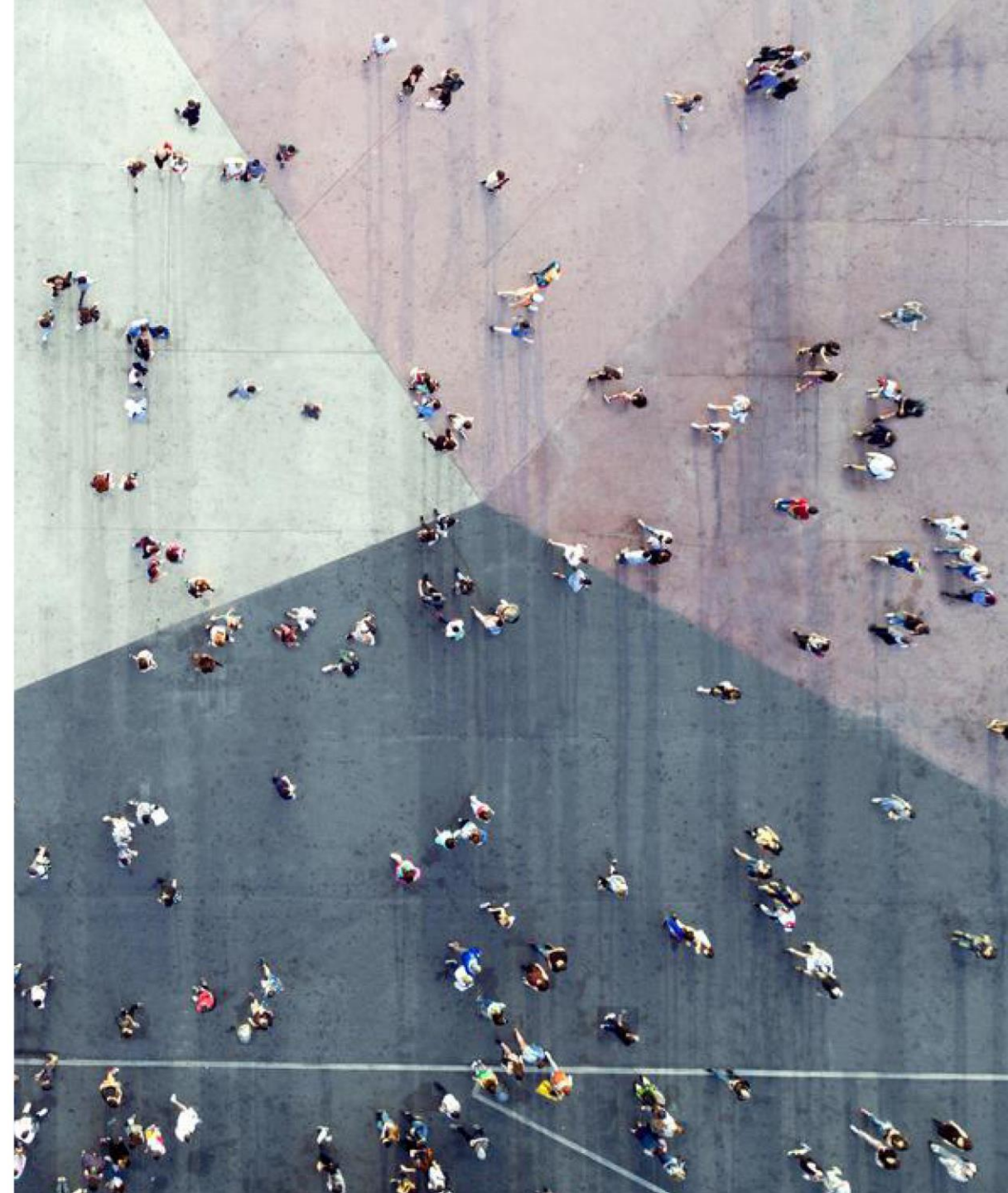
Key predictions to consider

- Advancements in product innovation, commercialization, and business intelligence
- More remote and intelligent devices that support a greater data narrative
- Business model shifts to the compensation model



Strategy recommendations for 2022

- Be adaptable and open to change
- De-risk your supply chain and plan for contingencies
- Embrace virtual or hybrid models when selling into health systems
- Anticipate COVID-19 peaks by looking at the data
- **Use the lessons learned to prepare for the next unprecedented crisis**



Today's takeaways

- **COVID-19 has brought monumental change to medtech**
- Many challenges have since been resolved, but many others are still ongoing
- Opportunities await in product innovation, patient centricity, data generation, and commercialization
- Business models must change in this new normal
- Stay adaptable and embrace change through uncertainty





Thank you!



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