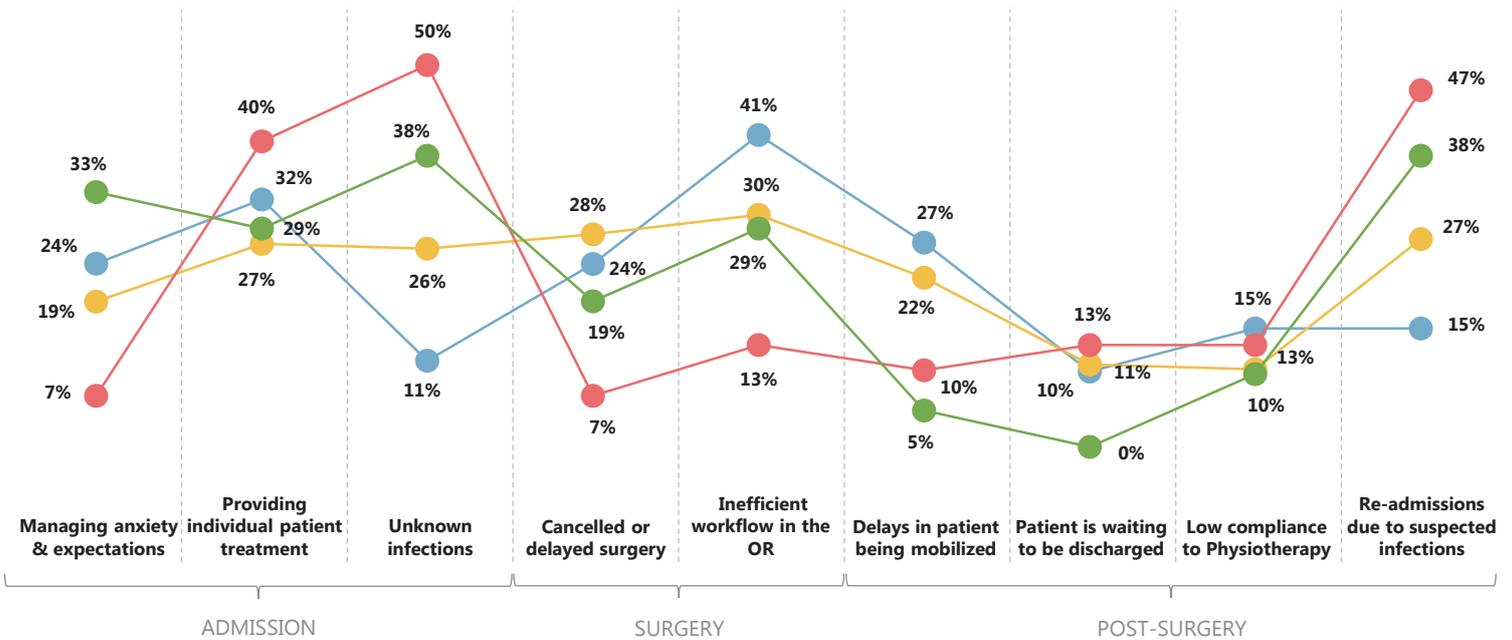


Challenges faced along the Orthopaedic patient pathway

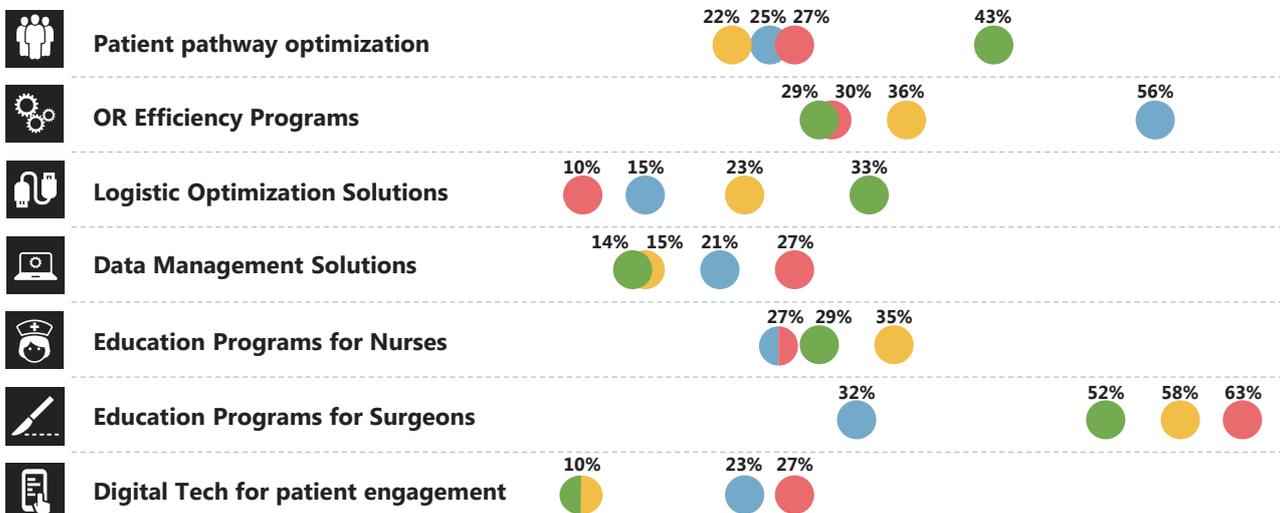
Infections, both upon admission and post-surgery, tend to be the biggest challenge in China and Brazil (and among the top challenges in Europe). Inefficient workflow in the OR tends to be the biggest challenge in the US.



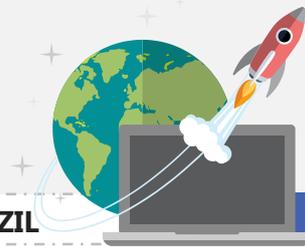
Respondents were asked to rank 9 prelisted challenges in order of importance. Figures show combined percentage of ranked 1 and 2.

Where should manufacturers be providing support?

In the US, the area requiring support is OR efficiency. This is no surprise given that inefficient workflow in the OR is one of the main challenges in this market. In the other markets, manufacturers should focus primarily on supporting education programs for surgeons.



Respondents were asked to rank 9 prelisted areas of support in order of importance. Figures show combined percentage of ranked 1 and 2.



Where are supplier technical assistants most valued?

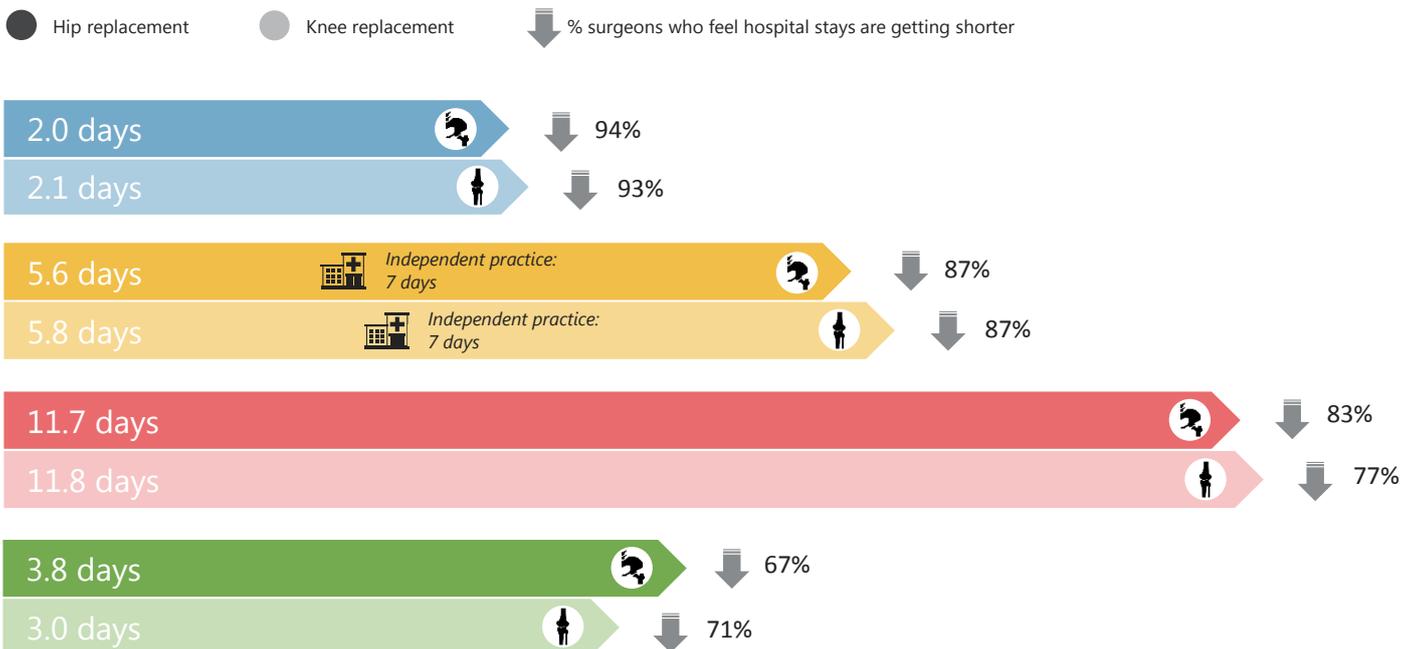
Brazil is the most likely to place high value on technical assistants, including for sports medicine surgery (which scores lowest in the other markets). Technical assistants have most value within knee replacement surgery in Europe, Brazil and China, and within spinal surgery in the US.

Showing % of physicians who place a lot of value or essential value on technical assistant



Average length of hospital stay (hip/knee replacement)

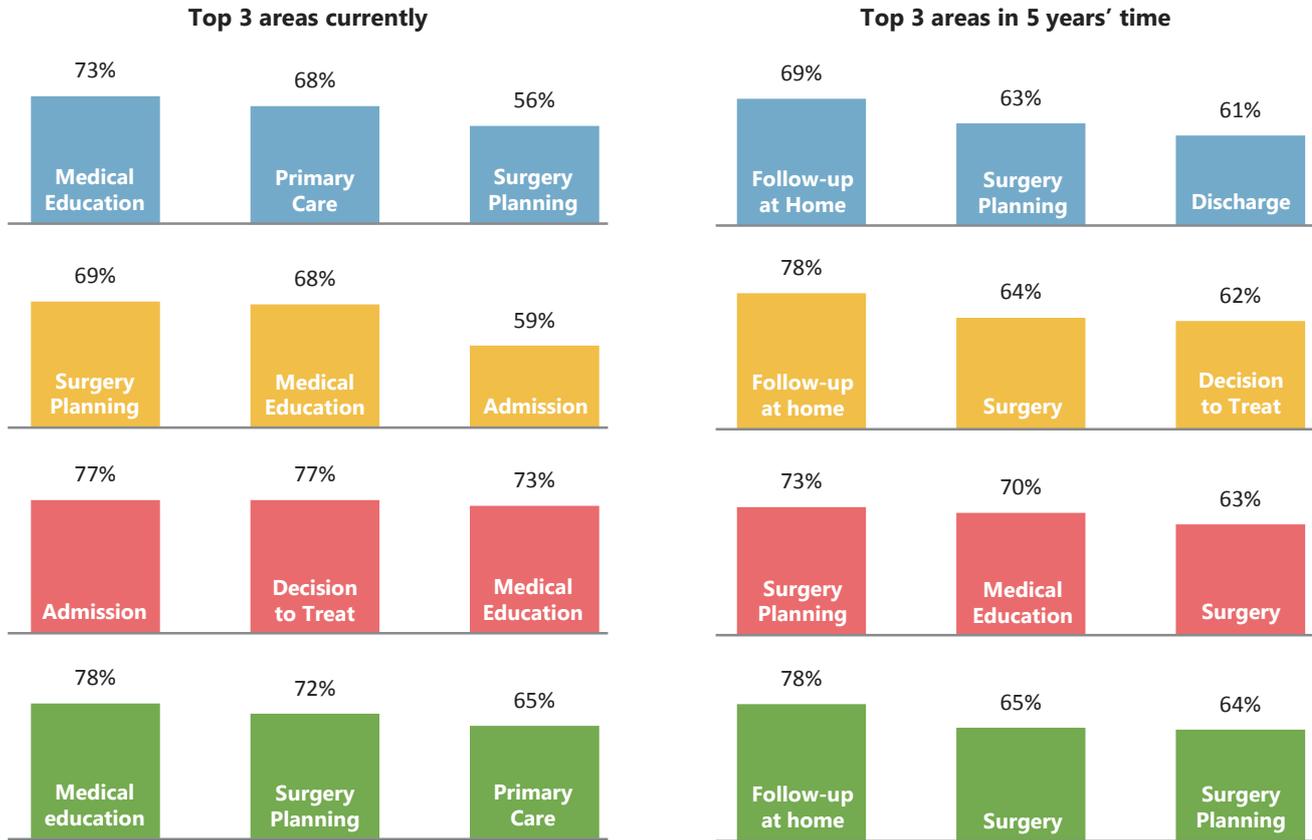
Length of hospital stay for hip/knee replacements is longest in China and shortest in the US. Length of stay is consistent across hospital types, except in Europe where it is slightly longer in independent practices. In all markets, stay lengths are getting shorter for both procedures.





Where are digital technologies playing an important role?

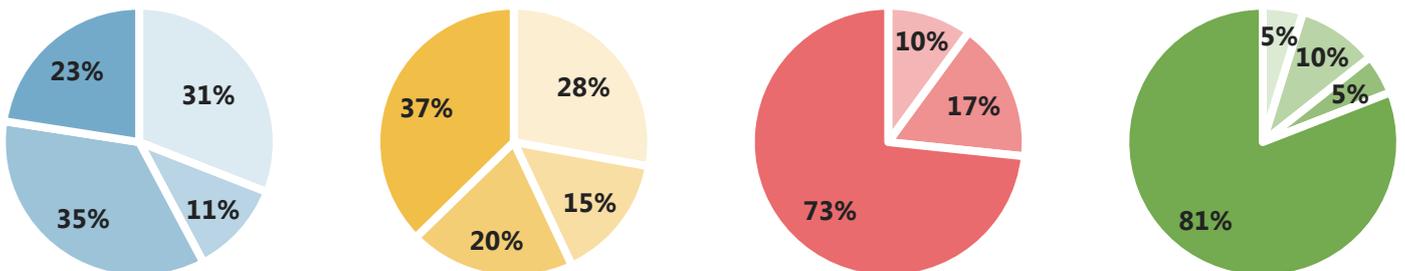
The US, Europe and Brazil believe that digital technologies will play an increasingly important role within follow-up at home.



Showing areas of the Patient Pathway where digital technologies are playing an important role

Attitudes towards robotic surgery

China and Brazil are far more positive about robotic surgery than US and Europe, with the majority of physicians in favour of robotic surgery and intending to use it.



- In favour and intend to use it
- In favour but don't intend to use it

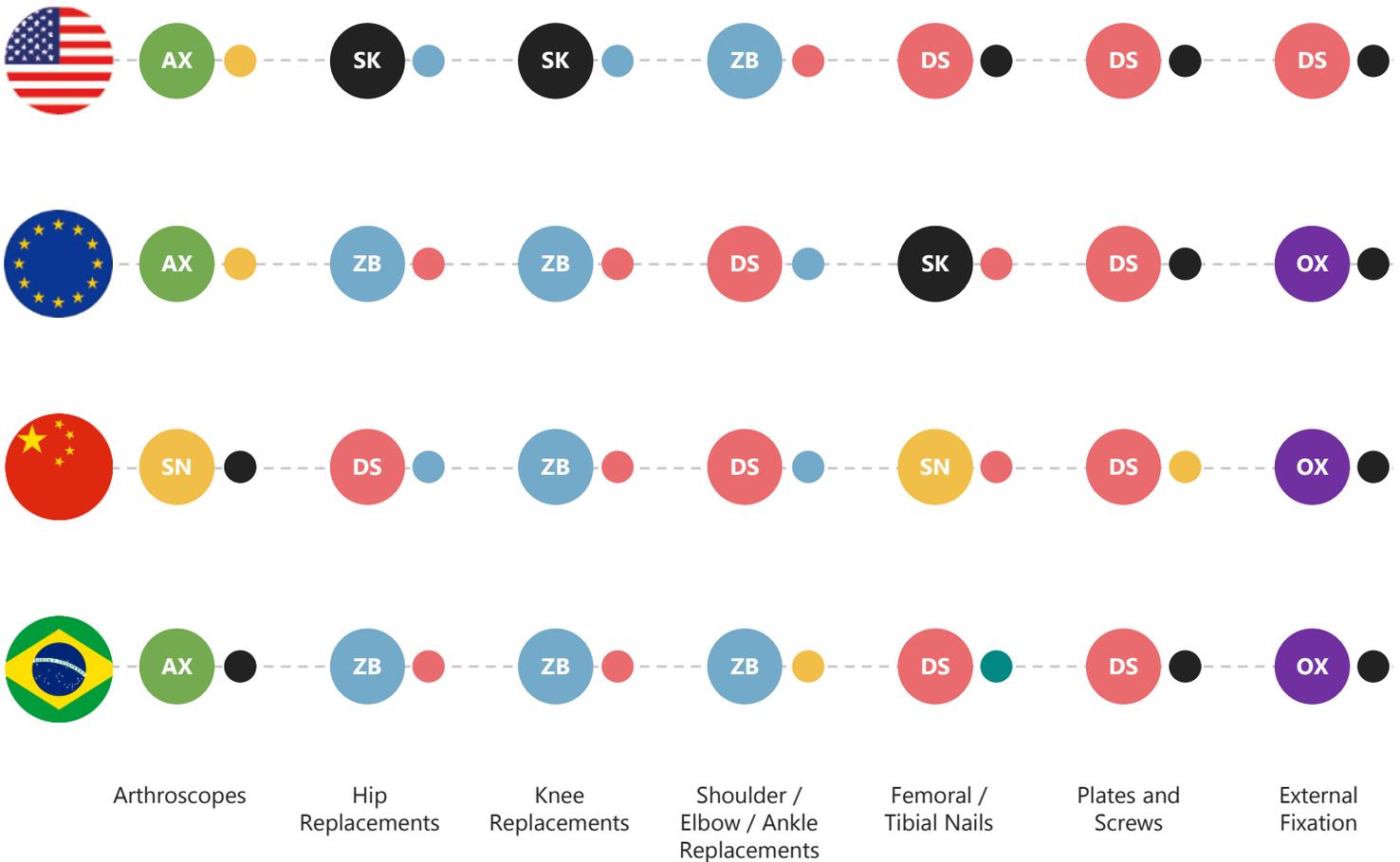
- Not in favour but feel I should adapt to it
- Not in favour and don't intend to use it



- Stryker (SK)
- Aesculap (AS)
- Orthofix (OX)
- Zimmer Biomet (ZB)
- Smith & Nephew (SN)
- Arthrex (AX)
- DePuy Synthes (DS)

Who is the most innovative manufacturer in Orthopaedics?

Zimmer Biomet and DePuy Synthes tend to be seen as the most innovative manufacturers across most therapy areas in all countries. The exceptions are Arthrex for Arthroscopes and Orthofix for External Fixation, which are the therapy areas they specialize in.





Most innovative manufacturer



2nd Most innovative manufacturer



Ipsos MD&D Pulse Survey **ORTHOPAEDICS**



How can SERMO RealTime benefit my business?

- SERMO RealTime (a digital HCP-only rapid research tool) is not intended to replace traditional quantitative surveys; however, it does provide a valuable option to gather almost instant and affordable insights in today's fast-paced environment.
- SERMO RealTime can be used for multiple purposes. However, it can be particularly useful for:
 - Refining an upcoming study design
 - Supporting ongoing business decisions
 - Checking on brand messaging and/or visuals
 - Tracking market trends
 - Analysing general sentiment pre- and post-campaign
 - Supporting a workshop discussion

How does it work?

- Questionnaires can be scripted and launched within 24 hours, although 1-2 days should be allotted if translation is required.
- Surveys can be in field for either 24 hours, 48 hours, or 5 days based on the sample number, types of questions being asked, and the target audience. However, **76% of all pulse surveys complete in under 5 hours.**
- Questions are fielded online to a global panel of 1.8 million HCPs. This Panel (managed by SERMO) encompasses 40+ specialities from 30 countries, including: US, Europe (15 markets), Mexico, Brazil, Argentina, Turkey, Russia and APAC (7 markets).
- Target lists can also be uploaded and panel matched.
- Following completion of fieldwork, raw data can be provided instantly in Excel, and PowerPoint (including analysis) within 1-3 days.
- Surveys are limited to **10 questions** with the option of 2 screener questions if needed.



Ipsos MD&D Pulse Survey **ORTHOPAEDICS**



Ipsos Healthcare

Ipsos Healthcare – the specialist healthcare division of Ipsos – partnering with pharmaceutical, bio-tech and medical device manufacturers to **inspire better healthcare**.

Operating in over 40 countries, our 600+ experts support key business decisions for our clients throughout the commercial lifecycle, from early-stage strategy, to launch, to performance optimisation. We do this through a uniquely integrated combination of therapeutic and market expertise, gold standard syndicated real world evidence, and market-leading custom research approaches – all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.



SERMO - A leading global social network for physicians where close to 800,000 fully verified and licensed physicians from more than 150 countries talk real-world medicine, review what peers think of different treatment options - including ratings and comments on prescription drugs - collectively solve cases, respond to healthcare polls, and earn honorarium from surveys.

In 17 years, SERMO has become the world's largest healthcare professional (HCP) polling company. The SERMO research network is comprised of 1.8 million HCPs and includes 40 percent of the U.S. physician population. Most of the 700,000 surveys SERMO conducts annually are among specialist physicians – over 70 percent of physician members are specialists.

For more information on MD&D market research and data from this survey, please contact us at:

medtech@ipsos.com

Or visit our microsite:

www.ipsos-medtech.com