



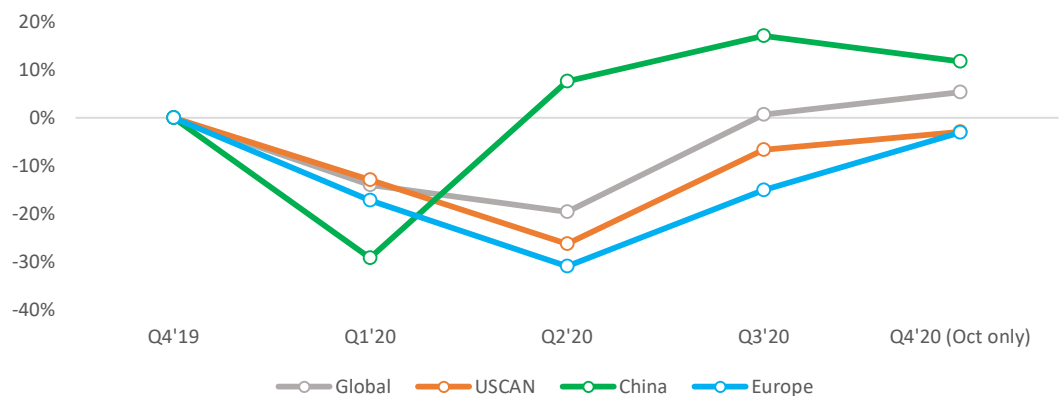
COVID 19 Implications

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COVID Impact

Procedure Volume V% vs Q4'19 Baseline



Key Takeaways

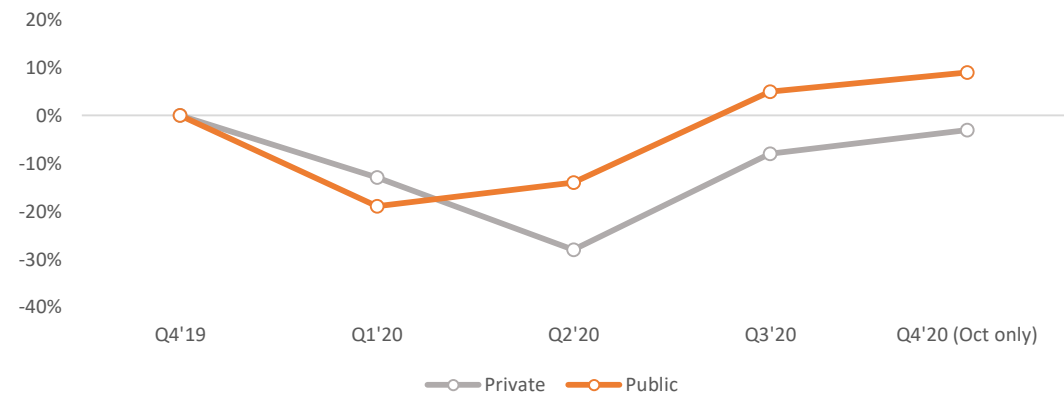
Trendlines show average scans per system per day* indexed to 100 at Q4'19

Global Imaging volume shows recovery from Q1/2 dip

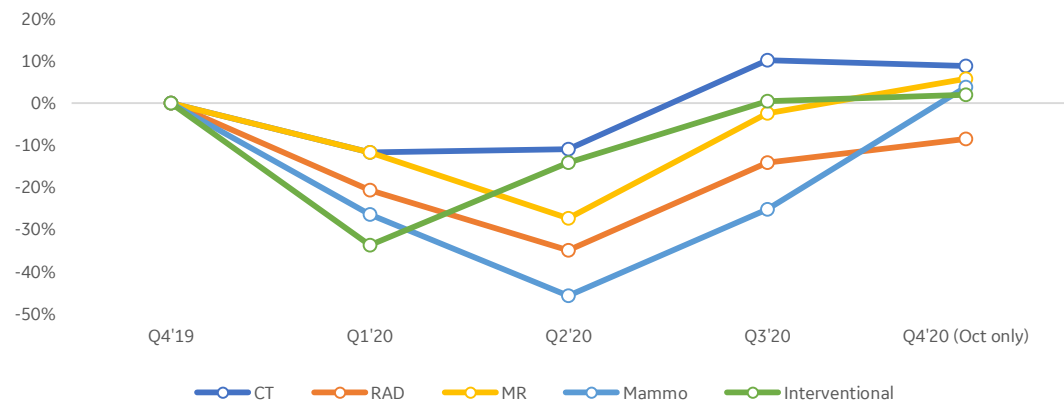
China lmg scans dipped in Q1, on recovery post two quarters

USCAN/EU scans volume on way to recovery...EU lower than pre-COVID average up till Oct'20

Procedure Volume V% vs Q4'19 Baseline



Public sector dominated markets show scans recovery starting Q3'20, continues into Oct'20; **for Private sector**, recovery beginning Oct'20...expected to reach pre-COVID levels in Q4



CT, MR, Mammography: show signs of recovery in scans volume to pre-COVID levels
RAD: scans volume lower than pre-COVID levels

* GE data; varies by region/modality

Public sector dominated markets: EMEA, China, LATAM, AKA; Private sector dominated markets: USCAN, India & SA; excludes Japan from market segment, included in total

COVID Impact

Greater acceptance and request of remote / virtual interactions

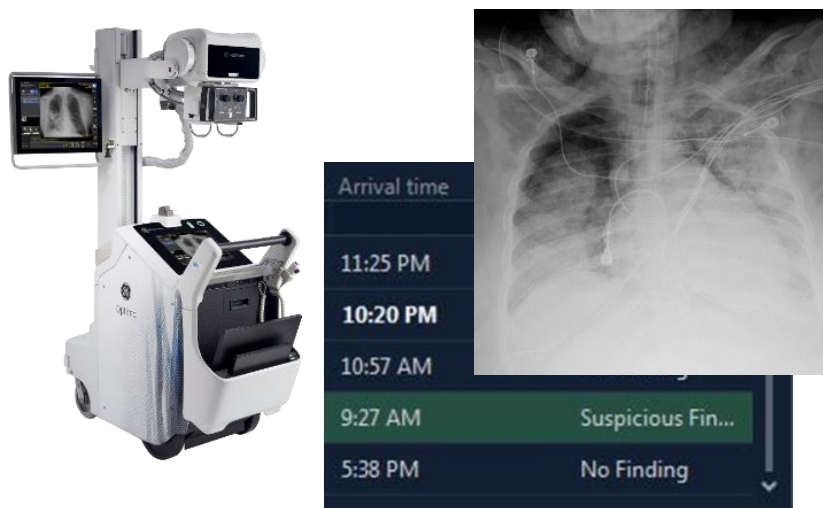
Example: Virtual training
Customer 1,800+ sessions



Virtual product and applications trainings to remote users for **CT, MR, Mammography, X-ray, and Ultrasound**. Video content for OEC and INTV customers.

Faster decision making and higher throughput, acceptance and need for AI enabled solutions

Example: Mobile X-ray With AI enabled Critical Care Suite



Applications that help triage critical patients – 80% attachment rate to mobile x-rays

Need for unique solutions to handle increased critical care load and keep patient and staff safe

Example: CT in a Box Remote operation



“bolt-on” CT to help with increased demand and reduce staff exposure



Five big themes for customers

Capacity

Pent-up demand for imaging could overwhelm imaging departments

What is the most effective way to **increase capacity**?

- Balance benefits / cost / staffing constraints / temporary-permanent

What is the **right location** for adding capacity? (**Outpatient vs Inpatient**)

- Reimbursement rate / cost-per-case / technology capability / patient experience / provider experience / regulatory requirements

Workflow

Adjusting operations to work through the backlog & social distancing will require complex **optimization decisions**

Increasing patient pool, more complicated patients, stricter cleaning procedures, will require **optimized workflows**

Experience

How to address the patient's fear of infection?

Many patients will prefer a "frictionless experience" of **outpatient or clinic visits vs. inpatient**

How to timely address the needs of referring clinicians and providers?

How to improve patient outreach?

Staffing

Imaging staff & physicians will have challenges around burn-out, return to work concerns & **productivity pressure**

- Staff being asked to do more – productivity solutions, quicker scan times, faster diagnosis
- Offset physician burn-out – AI solutions, advanced applications to remove manual burden

Cash Flow & Funding

Providers stretched financially – due to **impact of cash flow**, elective procedures being delayed or halted.

With **less capital funding**, managed models – fee per scan, platform as service will have more interest



Digital innovation to unlock capacity and improve outcomes

Smart devices
with enhanced
results in less
time

Predictive services
and remote fix
capabilities to increase
customer uptime

Subscriptions to
increase access and
align business
model to customer
needs

**Intelligent
applications and
workflows** to enable
contextual insights and
visualization

**Platform and
ecosystem** to
integrate data across
disparate systems and
enable analytics



