



Impact of COVID-19 on Laboratory Test Volumes, Challenges and Potential Services to Improve Workflow

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INTRODUCTION

Laboratory testing has a central position in providing insight and direction on the evolution of the COVID-19 pandemic. Laboratories are requested to increase testing volumes and cope with changes in demand and workflows. This may lead to changes in laboratory needs and engagement models.

Therefore, SUAZIO Consulting took a closer look and interviewed a sample of laboratory professionals in the USA and EU to understand expected test volumes, changes in workflow and expected services from laboratory diagnostics suppliers.

For this analysis, we interviewed a total of 64 laboratory professionals in the USA (N=19), EU (N=40) and APAC (N=5). Interviews were conducted in June 2020. Characteristics of sample are provided in Figure 1 & 2.

TEST VOLUMES

Our sample expected an average of 60% test volume increase, compared to pre-COVID, for PCR and Viral Molecular tests in a 3-month outlook. Overall, antibody tests and respiratory tests were indicated to increase, with 53% and 51% respectively. (Figure 3)

LASTING IMPACT AND WEEKS TO NORMAL

83% of the respondents believe COVID-19 will have a lasting impact in their laboratory test volumes in the next year. On average, our sample expects to return to normal, pre-COVID-19 test volumes in 22 weeks, with differences between EU (24 weeks) and USA (18 weeks) and between Laboratory Manager (23 weeks) and Head of Laboratory (19 weeks). (Figure 4)

CHALLENGES & POTENTIAL SERVICES

The COVID-19 pandemic results in challenges for the laboratories. The top five most impactful challenges are: shortage of diagnostic tests, a need to validate tests, staff education on new assays, shipping issues and personal safety issues/shortage of protective equipment. (Figure 5)

51% of respondents indicate their main diagnostics solution provider offers innovative solutions to support in their workflow. When asked what potential services could be offered, respondents highlight higher quality products, advanced technical support and increased test availability. (Figure 6)

CONCLUSION

Feedback from laboratory profiles indicate that laboratories will be impacted by COVID-19 for at least the remainder of the year. Diagnostics solutions providers have an opportunity to engage with laboratories to overcome their challenges and set up new customer engagement initiatives.

Most Impactful COVID-19 Related Challenges for Laboratory

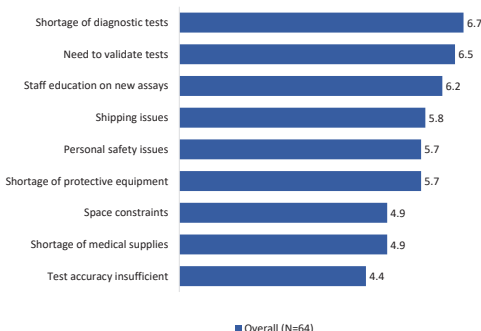


Figure 5. Averages of most impactful challenges to laboratory following COVID-19 measured on a scale from 1 to 10, where 1 is not impactful at all and 10 is very impactful.

Laboratory Type

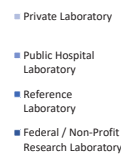


Figure 1. Distribution of respondents by Laboratory type

Profiles

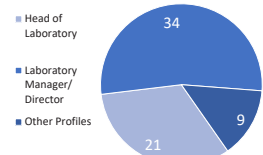


Figure 2. Distribution of respondents by Laboratory professional profile

Expected Change in Test Volume Compared to Pre-COVID - 3 Months From Now

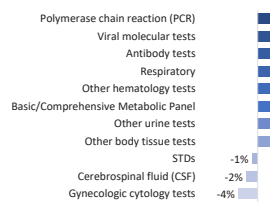


Figure 3. Average test volumes compared to pre-COVID in 3 months from now (June)

Lasting Impact of COVID-19 and Weeks to Normal Pre-COVID Laboratory Test Volumes

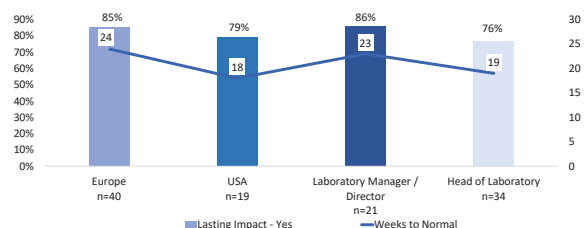
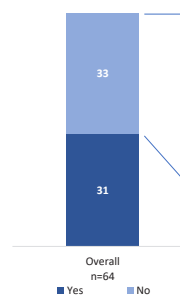


Figure 4. Percentage of respondents who believe COVID has a lasting impact on their laboratory test volumes in next year and average weeks to return to pre-COVID lab volumes

Innovation by Your Diagnostics Solution Provider



Most Important Potential Services by Diagnostics Solution Provider

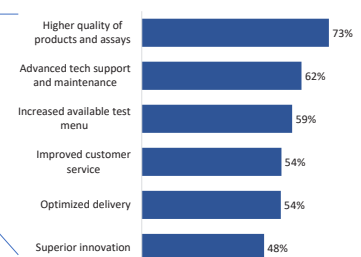


Figure 6. Number of respondents indicating that their main diagnostics solutions supplier offered them innovative solutions related to COVID-19 which enhanced their laboratory's workflow and make it more efficient and Potential services by diagnostics solution providers that would be useful.