

SELF-PAY FILLS A GAP IN SINGLE PAYER SYSTEMS

NAVIGATING THE COMPLEX REIMBURSEMENT LANDSCAPE USING QUALITATIVE MARKET RESEARCH

THE CHALLENGE

A leading pharmaceutical company conducting business in Taiwan wanted to know how to increase the self-pay business for a cancer medicine.

Taiwan has a single-payer healthcare system and access to newer medicines can be delayed as long as 18 months during the reimbursement review process by Taiwan's National Health Insurance Administration.

The company wanted to understand hospital management strategy and identify leverage points for self-pay treatment; explore three self-pay treatment opportunities from both physician and patient perspectives; understand physician hurdles for self-pay treatments and buy-in points regarding scientific evidence; and identify key considerations for patients and key influencers for self-pay acceptance.

The company engaged Kantar Health, a global leader in qualitative market research that's providing robust data, unique insight and real-world answers to some of the healthcare industry's toughest questions.

THE KANTAR HEALTH DIFFERENCE

Recruiting relevant respondents from hospital management staff is challenging, especially when seeking respondents who are senior in their roles and involved in the decision making process.

In order to maximize insight within hospitals, we recruited respondents from our client's preferred name list to ensure respondents of the highest quality.

Kantar Health employed qualitative research methods, which allowed us to listen to and understand respondents' stories through in-depth discussions, and then identify and extract strong insights from those stories.

Our process included a three-pronged approach.

1. We conducted face-to-face, 50-60 minutes, in-depth interviews with hospital management staff, physicians, patients, and patient group leaders. Kantar Health possesses broad capabilities to recruit many different types of respondents who are relevant and qualified to meet research objectives.
2. We conducted a physician focus group to discuss the product profile from both scientific and clinical practice point-of-views.

AT A GLANCE

You get what you pay for. That's especially true in single-payer healthcare systems, where reimbursement review processes can sometimes hinder patient access to the newest, most efficacious medicines for conditions.

In the short-term, self-pay and private insurance may be the best options for gaining access to life-saving medicines.

You need a partner that's an expert in qualitative market research and can help you navigate the often complex reimbursement and self-pay landscape.

BY WORKING MORE CLOSELY WITH OUR CLIENT ON CONSULTATIVE APPROACHES, WE STRENGTHENED OUR TRUSTED RELATIONSHIP

3. We selected moderators who are not only experienced in in-depth discussion, but also who are well-versed in the disease area and logic behind prescriptions. This step was critical, as moderators were able to probe and extract deep insights from respondents, which fulfilled our client's business needs.

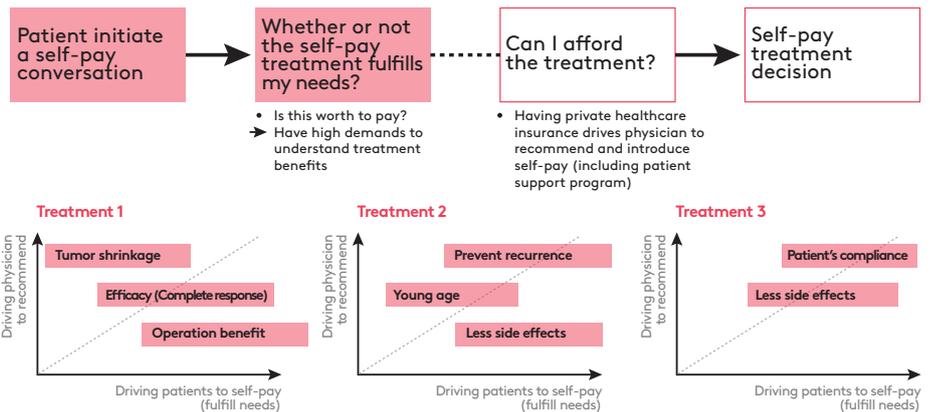
This engagement provided a host of benefits from both a client and relationship perspective, including:

- + a holistic view from the perspective of different stakeholders, i.e. hospital

management staff, physicians, patients, and patient group leaders

- + key insights about what matters to people and organizations, which will support business decisions
- + and an enhanced relationship with our client, as by working more closely with our client on consultative approaches we strengthened our trusted relationships and thus improved what we are able to accomplish together as a team.

SELF-PAY DECISION MAKING JOURNEY AND CONSIDERATIONS



FOR MORE INFORMATION, PLEASE CONTACT info@kantarhealth.com

WHY KANTAR HEALTH?

Kantar Health is a leading global healthcare consulting firm and trusted advisor to many of the world's leading pharmaceutical, biotech and medical device and diagnostic companies. It combines evidence-based research capabilities with deep scientific, therapeutic and clinical knowledge, commercial development know-how, and brand and marketing expertise to help clients evaluate opportunities, launch products and maintain brand and market leadership. Our advisory services span three areas critical to bringing new medicines and pharmaceutical products to market – commercial development, clinical strategies and marketing effectiveness.