

HOW TO CONDUCT A HEALTHCARE MARKET RESEARCH PROJECT IN A NEW MARKET

Understanding the local health
ecosystem to find the right suppliers

WHITE PAPER

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INTRODUCTION

Effectively managing a healthcare market research project in your home market can be challenging enough. But when tasked with a project in a new market, it can become even more daunting to navigate. Knowing the nuances of the local healthcare system in the market you're researching is paramount to a successful research campaign. It drives your sampling approach and if you base it off pre-existing methods of conducting research in your main market, the findings may be skewed. Specifically, the sampling will suffer if you don't understand the health system. It will delay the process and, moreover, if you appear inexperienced or irrelevant, you will not get the best suppliers to work with you.

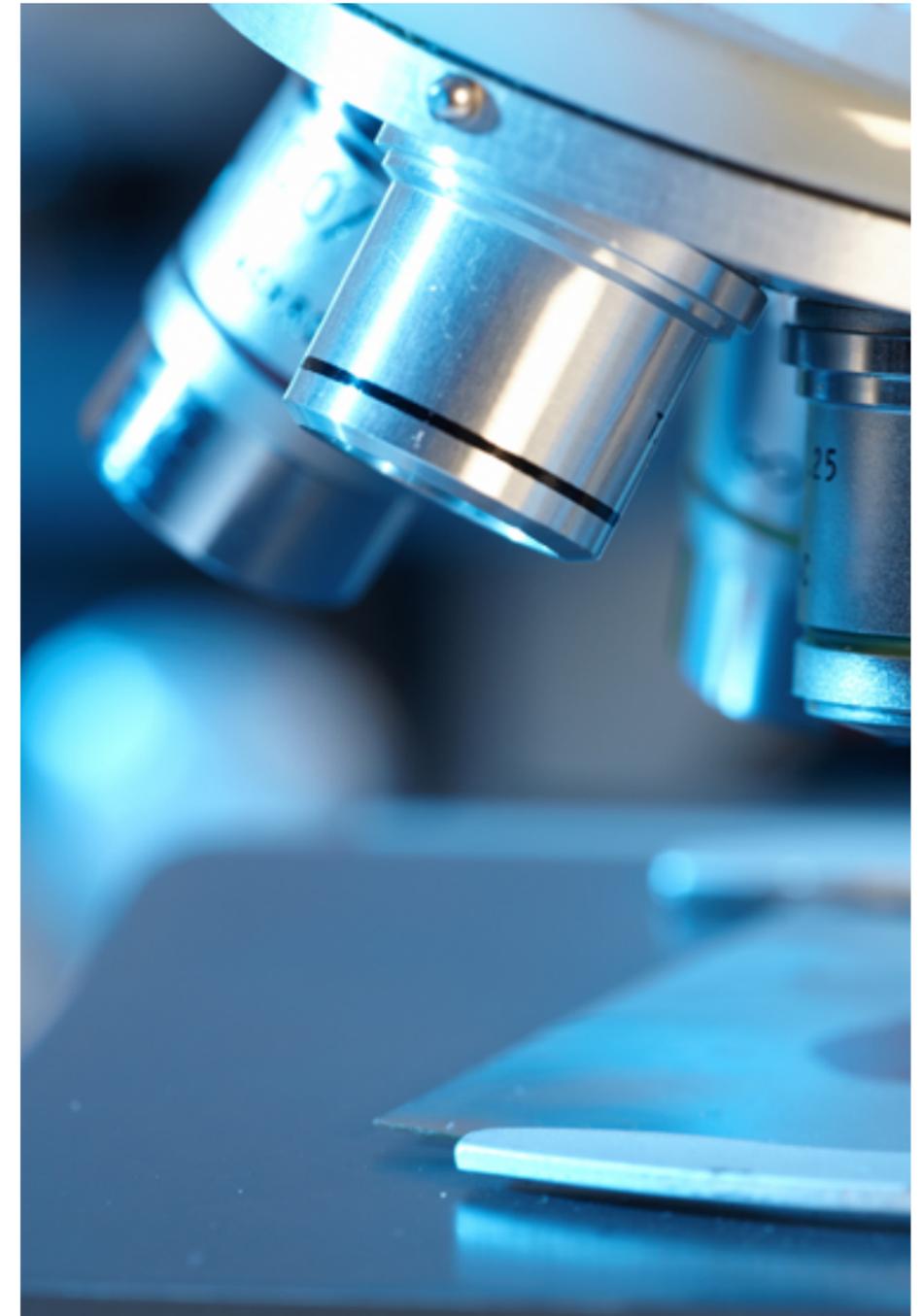
This paper explores the foundations of what researchers need to know before entering a new market to conduct healthcare research in, focusing on three

core areas of the health ecosystem: the culture, infrastructure of the system and public health situation in the respective country or region.

With that as your groundwork, you as a market researcher are in a much better position to choose the right suppliers for your research project. Later, we will provide some practical how-to advice for doing so, which should be especially relevant to anyone in the situation to make those kinds of decisions in a research project.

This deeper dive should help project managers and researchers gaining entry in International healthcare research gain a stronger grasp of the preliminary research to do and questions to ask even before the real research begins.

Let's get started.



KNOWING THE HEALTH CULTURE



Regions around the world view health differently. In many ways, health is intricately tied to culture and has been that way since the dawn of civilization. At a basic level, there are different approaches to health around the world that researchers should be aware of before engaging in research projects. For example, the health culture in China, which takes a more traditional and

holistic approach to healthcare, differs from the typical Western way of conducting healthcare.

Another point of difference you'll find across regions is who essentially drives the care. Of course, medical professionals are the ones in charge of diagnosing and writing prescriptions, but the culture can be broken down into two areas: a paternalistic approach and

a patient-driven approach to care. The first is a more traditional way of looking at things. The doctor, the medical professional, is the ultimate authority. Patients don't question the decisions of the doctor and accept them as they come. It is a top-down style that puts ultimate trust in the trained professional. A second approach that has become increasingly common in some areas is

the aforementioned patient-driven style of care. In this setting, patients are engaged and responsible for their health. Doctors are viewed more as service providers but not as an ultimate authority. This style puts more responsibility in the hands of the patient — it can be both empowering to the patient but also a new experience to one who is more familiar with the paternalistic approach. ▼

When conducting research in countries or systems with a more patient-driven approach, it is especially important to know the differences and understand the approach. There is typically a generational component too: patient-centered care is a relatively newer phenomenon in Western medicine culture. In an era with information at your fingertips, patients can conduct more research on their own than ever before. This, in many ways empowers the patient to become more prepared and ask more questions.

When trying to get a foundation for the local health culture on a research project, ask suppliers to point you to a few online communities on the topic. Ultimately, understanding the approach to healthcare in a given area or system is going to explain things like adherence to certain medications and choice of procedures. Doctors and health cultures who take a pathogenic approach are going to focus more on the factors that cause disease, whereas healthcare providers who take a salutogenic approach focus more heavily on supporting human health and well-being. These are complex terms for intuitive ideas. Some

countries and cultures may be very focused on health and well being and may take the latter approach. On the other hand, in countries like the U.S. where a rising number of adults face chronic issues like heart disease, diabetes and obesity, there may be more of an emphasis on getting to the root cause of diseases. It is not strictly one or the other, but there are definite differences in health cultures in regions and the approaches they take.

One example of how a region's health culture illustrates a dramatic difference in care: In Russia, women are typically sent in to the hospital shortly after they know they are pregnant. It is not uncommon for women to spend weeks

in the hospital in bed – even during a relatively normal pregnancy. Compare that to the United States where women get rushed to the hospital hours before giving birth.

In many ways, cost (and who is paying for it) drives the way the system functions. In places where healthcare is paid by the state, there is less of an incentive for people to leave the hospital. In a model where the costs are largely privatized, it is in the interest of health insurance companies and providers in some cases to get people in and out – providing the necessary care, in a sense, but nothing more.

Which leads us to a discussion of the system of care in and the importance of understanding that amid a research project.

DEFINING THE SYSTEMS AND PAYOR MODELS

In the same way the health culture varies in regions around the world, the systems of care and, ultimately, who pays for what, is also different. These too are important elements to understand when conducting research.

For example, in some regions, it may be more common than in others to have standalone physicians consulting in their own clinics. In other parts of the world, there may be no such thing and physicians will exclusively be linked to a larger healthcare system, whether it is privatized or a public benefit. When con-

ducting research projects and targeting key decision makers within the health system, you're going to want to understand the flow of patient care and who works where. If your interview strategy is focused on smaller clinics and there aren't any in the given area you're researching, you're going to have to shift the approach. You may also very well end up spinning your wheels to locate the right healthcare professionals to interview if you don't understand the arrangement of a given local healthcare system. Or, if you don't understand the

geographic makeup of where healthcare is centralized in a given area. Let's say you want to be connected to the main oncology centers in Russia. But, if they are not in Moscow, then where are they? You'll need to know those details. Geography is very important as the choice of the specialist is directly related to the central hospitals who would treat certain diseases. This is where finding target market research agencies to partner with in regions can be so crucial. *More on how to decide that a little later in the paper.* ▼

While knowing the foundation of the local healthcare system is important, along with its geography, it's equally important to understand the payment models in place. Market research firms not familiar with the U.S. model need to be aware of HMOs, PPOs, Medicare, Medicaid, CHIP and other programs that supplement care. The U.S. is a hybrid of public and privatized medicine, one that has gone through reforms and continues to be under the scrutiny of politicians and policy makers.

In other regions, the health insurance is fully subsidized by the state. Federal health insurance can impact the facilities doctors work out of and where specialists are located, among other things. And even in regions where medical care is public, there are in some cases private options for affluent individuals who can afford to pay a much higher premium for care. Knowing the many nuances of insurance and the payor system in a given country or region can go a long way in understanding the health system as you embark on research projects.



DETERMINING THE PUBLIC HEALTH SITUATION IN A REGION

Beyond the health culture, the system and payor models, it is also important to look at the overall public health situation at a glance: Where does the country stand in terms of expenditures? Are health decisions driven by access to care or cultural factors?

¹NIH www.ncbi.nlm.nih.gov/pmc/articles/PMC4743929/

One example: According to 2016 data, 18.6 percent of all births are Caesarean Sections. They are most prominent in Latin America and the Caribbean (more than 40 percent) and least common in Africa (7 percent). An analysis of the data concluded C-Sections have in-



creased worldwide to “unprecedented levels.” The question is whether a decision like this is simply due to increased access to it or if it is a cultural shift to choosing to have one – or a combination of both¹.

Navigating the public health system

of a given area – and learning about how and why various health decisions are made, as well as public health issues to be aware of – advances a researcher’s understanding of the overall health ecosystem of a region.

FINDING THE RIGHT SUPPLIERS FOR A HEALTHCARE RESEARCH PROJECT

Once you've gained working knowledge of the healthcare experience in the area for a market research project, the next step is to find the right people or agency to conduct fieldwork for it. Having a broad understanding of the healthcare ecosystem makes it that much easier to narrow down your options and find the right fit. You will be able to ask more competent questions when interviewing suppliers and metaphorically speak the language.

But how to go about finding the right suppliers? The final portion of this paper provides practical advice for doing just that.

PLACES TO SEARCH FOR YOUR NEXT HEALTHCARE RESEARCH PROJECT

- **Check ePhMRA**
This is probably the penultimate organization for healthcare researchers around the globe. Take a look at their supplier list in a given industry and begin your interview process there.
www.ephmra.org
- **Engage ESOMAR**
If you're not familiar, ESOMAR is a leading global organization for market researchers. You can sort through suppliers that specialize in healthcare research projects and have the assurance that these suppliers are part of an internationally recognized research organization.
www.esomar.org
- **Reach out to The Research Alliance:**
Bazis is part of an organization of agencies that cover dozens of countries around the world to conduct research projects large and small. Contact us at info@bazisgroup.com to learn more.
www.research-alliance.com ▼

QUESTIONS TO ASK ONCE YOU'VE NARROWED DOWN YOUR SUPPLIER LIST TO SEVERAL OPTIONS

THE FOLLOWING QUESTIONS WILL NOT ONLY INFORM YOU FURTHER, THEY WILL ALSO HELP YOU DETERMINE THE RIGHT SUPPLIER FIT.

1.

For our research project, who do you suggest we target? (Hospitals vs. doctor offices, specialists charged with treating a healthcare issue in your country, etc.).

2.

What is the decision-making hierarchy for this specialty? (Payors, department heads, hospital officials, etc.)

3.

How is your recruitment structured? (Ask for suggestions in terms of target clinics for the specialty being researched, about sample structure, who to target and so forth)

4.

What are the legal implications for incentives? (These are regulated by local laws; some physicians can't take certain incentives)

5.

What are a few local resources related to public health? (Ask about the main resource capturing public health information and stats in that country / region. Also, ask about online physician communities in their area)

ABOUT BAZIS

Our company, Bazis, would love to continue the conversation with you. Are you experiencing similar challenges when conducting research projects? Are there other challenges you're experiencing that we haven't discussed in this paper?

We are always committed to talking to our peers and educating whenever we can. And, if you're a company in need of a market research consultant in a developing country, we are available to work alongside you. As a strategic member of The Research Alliance, we work with a network of more than 20 research agencies around the world – our alliance has the capability to carry out market research in just about every corner of the globe.



FOR MORE INFORMATION

We are always happy to be a resource for market researchers venturing out on a healthcare research project in a new market. Overall, we've helped with market research projects in more than 50 countries around the globe.

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