



Key

- Direct Interactions
- ■ ■ ■** Indirect Interactions

Pharma: Personnel employed in a pharmaceutical company or healthcare related or service supporting organization. They are engaged in advancing and improving the production and delivery of healthcare products and services.

Provider: Certified personnel professionally licensed to administer medical treatment and/or advice for a disease or condition. We assume here that they consolidate and reengineer their care delivery and information processes to provide cost-effective integrated services across the continuum of care.

Payer: Health Insurance and managed care organizations focused on managing the quality and cost of healthcare delivery. Also they may provide financial incentives for medical providers to provide high-quality, cost effective care.

Patient: Effectively consumers who take informed control of their health and work in partnership with physicians and payers to receive high-quality medical outcomes in the most appropriate clinical setting.

Figure 2: Post-Internet healthcare

questionnaire was conducted on a sample of 36 HP personnel employed in a local Japanese hospital with all participants responding (100% response rate) to the questionnaire face-to-face. Questionnaire response rate, age, gender and occupation stratification for each of the three stakeholder groups are summarized in Table 1.

Table 1: Response rate, age, gender and occupation stratification for each of the three stakeholder groups

Stakeholder Group	Overall Response Rate (Sample Size n)	Age Range (Mean)	Gender Ratio (M:F)	Occupation Stratification*
Pharma	12.6% (215)	25 – 66 yrs (45.1)	9:1	EM (5) MM (7) LM/SP (1) NC (7) NA (7)
Provider	100% (36)	22 – 49 yrs (32.2)	3:1	NA
Patient	100% (46)	22 – 49 yrs (33.2)	22:17	NA

Note:

*EM = Executive Management; MM = Middle Management; LM/SP = Lower Management/Subordinate Personnel; NC = Non-classifiable; NA = Non-Applicable

3. Results and Analysis

Healthcare Related Internet Behavior in Japan – General Issues

The Internet has become an integral communication medium for both consumers and healthcare professionals alike. Knowledge of healthcare related Internet usage and attitudes towards security concerns across key stakeholder groups is crucial for understanding the critical mass of e-commerce opportunities within Japanese healthcare. Pharma, Provider and Patient groups surveyed were mostly found to make light usage of the Internet within less than 2 hours a day. Providers take up the narrowest spread of Internet usage with all respondents falling within the <8 hour timeframe, while 2.8 and 3.7 times greater medium daily usage of the Internet (2-8hrs/day) was found for the Patient and Pharmaceutical stakeholder groups respectively (Chart 1).

