Japan Healthcare Data (JHD)
A Globalsphere Company

www.japanhealthcaredata.com
info@japanhealthcaredata.com
+1-917-612-8403

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JHD Fills the Gap for Reliable English-Language Data on the Japanese Healthcare Market

1. Japan is the second largest healthcare market in the world
   • Annual Japanese healthcare spend is over $400BN\(^1\)
   • The Japanese medical device market is worth over $38BN\(^2\)
   • The Japanese pharmaceutical market is worth over $95BN\(^3\)

2. Despite its size, reliable English-language data on the Japanese healthcare market is scarce

3. This gap in the marketplace makes it difficult for multinational life sciences companies to make informed decisions about their business in Japan

4. Japan Healthcare Data (JHD) provides multinational medical device and pharmaceutical companies with the data they need to make the best decisions regarding their business in Japan

There is a gap in the market when it comes to reliable English-language healthcare data on Japan. JHD fills that gap so that our clients can make decisions with confidence.

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1. Source: WHO
2. Source: Global Data, June 2011
Japan Data Challenges

Several factors make it highly challenging to secure reliable English-language data on the Japanese healthcare market:

1. Language
   • Reliable data on Japanese healthcare market exists only in Japanese
   • Companies lack the language expertise to handle Japanese language sources
   • Tools like Google translate have limited accuracy with Japanese

2. Coding
   • Japan uses its own, complex coding system (rather than ICD9 / ICD10)
   • Japanese coding uses unique combinations of diagnoses and procedures (DPCs)

3. Access
   • Sources for Japanese healthcare data are fragmented, some public, some private
   • Public data sources are opaque and difficult to navigate, even for Japanese speakers

4. User Interface and Analysis
   • Much of the reliable data is in hard-coded documents or user-unfriendly formats
   • Even costly private data requires extensive manipulation to render it analysis-ready

Through our bilingual staff, knowledge of Japanese healthcare data, and clear business analytics, JHD eliminates each of the challenges above.

We deliver the most comprehensive, reliable data on the Japanese healthcare market – always up-to-date, in English, in user-friendly formats
JHD Offers a Full Suite of Healthcare Market Data

JHD is the most comprehensive, reliable source of English-language data on the Japanese healthcare market, to help our multinational life sciences clients to make the best decisions regarding their business in Japan.

- Procedures
- Diagnoses
- Patients
- Hospitals
- Payments

**Reimbursement**

DPC, fee for service, materials fees, technical fees

**Disease States, Medical Conditions**

Prevalence, incidence, mortality

**Medical Procedures**

Inpatient, outpatient, surgical, non-surgical

**Hospitals**

Departments, specialties, patients treated by disease state

- By specialty
- By disease category
- By facility
- By geography
By Helping Clients Answer Key Questions About the Japanese Healthcare Market...

- What percentage of spinal injuries are treated surgically?
- Which prefectures have the highest rates of smoking?
- What’s the total value of the abdominal hernia market?
- How many people in Japan have type II diabetes?
- How many cholecystectomies are performed each year?
- What’s the reimbursement for a total hip replacement?
- Which hospitals perform the most craniotomies?
- How many accredited urology departments are there in Japan?

**Market size**
(procedures, value)

**Key market segments**
(geographies, accounts)

**Reimbursement levels**
... JHD Helps Companies Make the Most Informed Decisions About Their Business in Japan

To support companies’ most important business decisions in Japan, JHD helps answer the most important questions:

- Market Entry
- Commercial and Strategic Planning
- Sales Force / Sales Territory Design
- Business Growth
- Account Targeting
- Business Optimization

- Go/No-Go
- How much to invest
- Where to focus the investment
- What returns to expect

JHD – The most comprehensive, reliable source of English-language data on the Japanese Healthcare market
The Next Level – Turning Data into Results

A decade of experience helping global medical device and pharmaceutical companies succeed in Japan

The most robust data sets available on the Japanese healthcare market

Bilingual, binational staff with a deep understanding of how to get things done in Japan

Decades of combined management consulting experience, from strategy to operations to systems

Business analytics experts to help reveal the meaning behind the data

Data is necessary and critical, but not sufficient

Our management consultants, business analytics experts, and seasoned Japan specialists can help you transform our data into powerful insights and measurable business results.
## Details on Coverage

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| **Geographic Coverage** | • 100%, JHD’s databases encompass the entire country  
• JHD’s databases have detailed procedural data at the prefecture level |
| **Hospitals**   | • 100%, JHD’s databases cover all of Japan’s 8,000+ hospitals  
• Procedure-level data covers 59% of the hospital beds in Japan (79% of beds in hospitals with over 500 beds) |
| **Procedures**  | • For major medical procedures, JHD’s databases cover 76% of procedures performed  
• For minor medical procedures, JHD’s databases cover 59% of procedures performed |
| **Patients**    | • Inpatients: JHD’s databases cover 60% of hospital inpatient discharges for over 500 disease categories  
• Outpatients: JHD’s databases cover 100% of hospital outpatients for approximately 50 broad disease categories |
| **Diseases**    | • JHD’s databases cover over 500 diagnosis procedure combinations  
• JHD has incidence, prevalence and mortality data for hundreds of medical conditions |
## Accuracy, Timeliness, Confidence

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| Procedures and Patients    | • JHD’s data on procedures and patients come from Japanese government databases, which use mandatory hospital reporting  
                              • They are updated annually                                                                                                                                                                                    |
| Hospitals                  | • JHD’s data on hospitals (contact details, departments, specialties, beds, etc.) is based on Japan’s largest private hospital survey of 8,000+ hospitals  
                              • Japanese hospital data change little from year to year. They are updated approximately every 2 years                                                                                              |
| Diseases                   | • JHD is constantly scouring the latest journal articles, international databases and related sources to expand and refresh our data on disease states, prevalence, incidence and mortality                                                                 |
| Reimbursement              | • Reimbursement in Japan is adjusted every two years on April 1st (even numbered years). JHD refreshes its reimbursement database as soon as official government data are released                                                                 |

JHD offers one-time and refreshable data packages, to meet our clients’ ongoing needs