KANTAR IMRB

FICCI @90

THE HEALTHCARE CONSUMER

Understanding expectations & experiences in the patient's journey

AUGUST 2017



FICCI HEAL

Indian Healthcare: A Patient's View

17-18 August, 2017 | FICCI, New Delhi



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FICCI FOREWORD

Development of a country is usually predicated on the prosperity and health of its population. Indian healthcare is currently at a point of paradox. On the one hand, India has world-class healthcare facilities, superb medical expertise and sophisticated technologies and treatments available to the affluent. At the same time, a large section of the population finds it hard to afford even the basic primary healthcare and is often plunged below the poverty line on account of healthcare related expenses.

In the past when India's healthcare infrastructure was even less developed and the population was not as aware of available treatments, there was complete trust in the judgement of the family physician and other medical practitioners. However, with the introduction of large format healthcare facilities over the past two decades, an increasing array of diagnostic capabilities, super specialist clinicians and the relative "disappearance" of family physicians from the Indian healthcare scenario, coupled with the perception of over-priced treatments and excessive testing by practitioners, this has led to the development of distrust between the medical fraternity and the public, which has manifested in violence against doctors and hospitals in some cases recently.

We believe that the healthcare policy of a country should consider the needs of all stakeholders and beneficiaries. While the private sector and the government get an opportunity to voice their opinions in policy formulation, the main beneficiary - the patient remains unheard most of the time. Our healthcare ecosystem needs to be more patient-focused by demonstrating greater sensitivity towards patients, understanding their expectations, engaging with them and providing them with customized options to choose from.

Federation of Indian Chambers of Commerce and Industry (FICCI) as a change agent has been working diligently with the government to bring about requisite policy changes that can provide impetus to the growth of health services sector and provide quality healthcare for all. FICCI HEAL 2017, based on the theme, "I**ndian Healthcare: A Patient's View**", is an attempt by FICCI to bring the perspective of a patient to the forefront.

Last year, FICCI had published a study on the need for patient-focused care to re-engineer Indian healthcare. This year, we have collaborated with KANTAR-IMRB to carry out a nationwide survey on 5000 healthcare consumers to understand their satisfaction levels. This joint study by **FICCI** and **IMRB** further evaluates the experiences and expectations of patients in India and suggests the way forward for Healthcare providers to orient their practices towards patient-centric care delivery.We are grateful to **Ministry of Health and Family Welfare, Government of India and NITI Aayog, Government of India** for supporting **FICCI HEAL 2017,** "I**ndian Healthcare: A Patient's View**" scheduled on August 17 & 18, 2017 at FICCI, New Delhi. We hope that the deliberations in the conference will help us in coming up with concrete recommendations for the healthcare sector that will be submitted to the Government at the highest level for consideration.



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FICCI Health Services Committee &
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KANTAR IMRB FOREWORD

India's healthcare industry is transforming rapidly. One area where transformation is fairly evident is hospitals. A large number of factors have been instrumental for this. Significant investments in private sector, emerging technologies and key scientific innovations such as life-saving drugs and devices have increased prevention of illness or disease and improved patient outcomes in India's healthcare industry. Besides this, increasing penetration of health insurance and changing consumer preferences have changed the landscape of healthcare industry.

Though this journey of transformation has brought tremendous growth in healthcare sector, there are challenges that beset the sector. These challenges have been the bane of the sector for a long time. Inadequate healthcare facilities, infrastructure, and paucity of trained healthcare services professionals are a few key challenges. Add to this, low penetration of healthcare insurance and changing demographics of India. But one of the biggest challenges that beset India's healthcare sector is the inability to adapt to rapidly evolving consumer expectations.

There are multiple factors responsible for change in the consumer's expectations, attitude and behaviour toward healthcare in recent years. These are:

Exposure to other service sectors and increasing purchasing power
Proliferation of technology and internet, which is increasing consumer awareness
Increasing availability of multiple healthcare options especially in urban India

These factors have led to 'service experience' emerging as a key factor that impacts the healthcare consumers' loyalty. Besides this, the promise of a positive outcome, which means quality of treatment and hospital's reputation, continue to play crucial roles in ensuring healthcare consumers' loyalty.

It has been observed that patient satisfaction leads to positive business outcome for healthcare providers. Hence, hospitals should have access to information to manage patient expectations and experiences, which will help them deliver growth and profitability for their shareholders.

FICCI and **Kantar IMRB** conducted a market survey with a sample size of more than 5000 patients to understand their expectations and experiences. The findings of this survey are captured in this **2017 Healthcare Consumer Report (HCR).**

The report offers valuable insights into the patients' experiences and expectations. The objective of this report is to understand the behaviour of healthcare consumer. It identifies and explains the current challenges faced by healthcare providers in providing a positive and seamless patient experience. Directions offered by this report will help hospitals to improve healthcare consumers' loyalty.

FICCI and Kantar IMRB wish to thank the patients for their time, valuable feedback, insights and suggestions. We hope you find this report useful and the perspectives presented in the report would help you enhance the 'Healthcare Consumer



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HEALTHCARE TODAY

The state of India's healthcare sector is a key concern. A large population and low public spend in health have limited improvements in the quality of services offered. According to World Health Organisation Global Health Expenditure 2014 database, Indian government's expenditure on health as a % of total expenditure is at 30 percent as compared to China, where the government spending is at 56 percent of the total health expenditure. Data also shows the per capita government expenditure on health for India to be lower in comparison with China, which has the largest population in the world.

According to National Family Health Survey-3, the private sector remains the primary source of healthcare in both urban and rural India. In the report, several reasons are cited for relying on private rather than the public sector. One of the reasons at the national level is poor quality of care in the public sector. But private sector is relatively unaffordable and with concentration in metros mostly, leading to unequal access. The below average bed to population and doctor to population ratios that exist signals to the importance of the need of adequate infrastructure and resources, though more so in rural than urban India.

Given this, it is imperative that the government needs to give priority to healthcare in its budget and policies. Public-Private Partnership (PPP) could be one of the efficient ways to deal with these problems. But a lot needs to be done to ensure that goals of each entity are fulfilled. Our challenge lies not only in providing access to quality healthcare but also provide healthcare which is affordable and patient-centric.

Today, providing the best treatment is the focus of most healthcare providers in India. There is a copious amount of information regarding healthcare infrastructure and facilities, status of healthcare workforce and the Union Budget's allocation to healthcare. There is also awareness about the statistics of how many people are covered under health insurance, how does India's healthcare system fare against the global standards and the changes in disease patterns of Indian population. Careful understanding of these is a must before formulating the healthcare strategy to deal with challenges in future. But these observations do not take into account one critical factor: the healthcare consumer or the patient. Healthcare service providers or hospitals need to have a clear idea of what the healthcare consumer wants. These strategists should also know about the perceived gap in healthcare consumer experiences.





This will help build a more patient-centric strategy which will be a win-win case for both patients and hospitals in a competitive market.This idea is bought by both the government and the healthcare services providers.

In India, one can see visible effort and progress on the part of private healthcare providers as well as the government, to manage and support better quality patient care in the recent years. The National Health Policy 2017 which replaces the one framed in 2002, as well as other initiatives like the 'Health Index' rolled out by NITI Aayog, My Hospital, e-health, Kayakalp platform are all steps to enhance the quality of healthcare. 'My Hospital' is the Ministry of Health, Government of India initiative to capture patient feedback for the services received at the public hospital.

All these policy initiatives are aimed at improving the healthcare facilities offered by the government. The government wants the public facilities to offer better healthcare services which will be driven by patient's needs. These policies aim to make the healthcare systems more accountable and patient-centric.

As the government brings in 'patient's needs' as the focus point in all its policy decisions, large private hospitals and other healthcare services providers too are willing to walk that extra mile. For many, 'Patient feedback' has emerged as an important input in their systems to monitor and improve quality of services. As an indication of focus on quality, healthcare providers are opting for accreditations in recent years. Such accreditations lead to high quality patient care and safety. This approach of accreditations not only benefits patients but also distinguishes hospitals in a competitive environment.

One can safely say that both private and government health providers have recognised the importance of 'listening' to their patients for improving and driving the 'patient centricity' strategy within their hospitals.

EXECUTIVE SUMMARY

Understanding the healthcare consumer's experiences and expectations is the first step towards plugging some of the gaps in the patient centric strategy being developed by healthcare providers.

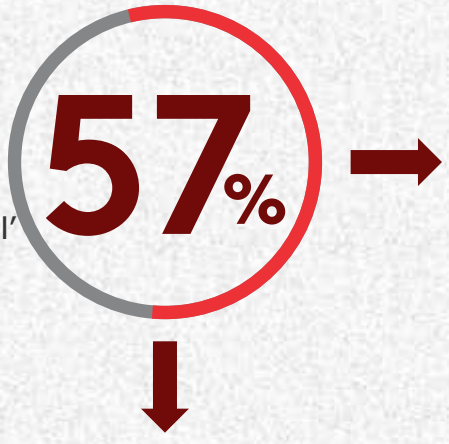
WHAT MAKES THE HEALTHCARE CONSUMER LOYAL?

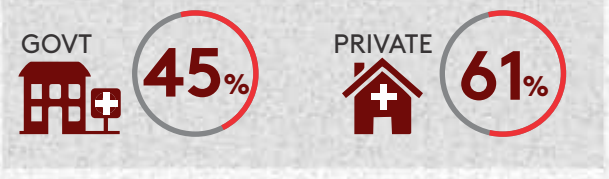
- The brand and reputation of the hospital
- A seamless experience in his journey with the hospital, including a good outcome (basis the treatment)
- Affordability in terms of costs

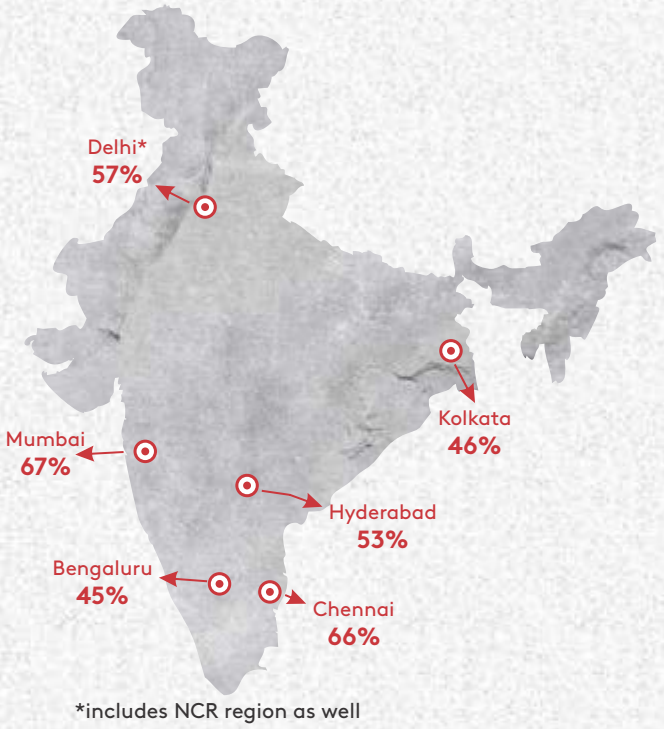


HAVE THE HEALTHCARE PROVIDERS DELIVERED ON THE CONSUMER EXPECTATIONS?

57%
Patients rated their 'Overall experience with the hospital' positively







*includes NCR region as well