

To Study Consumers Perception About Home Health Care Services

By

Shriya Wadhwa

*Dissertation submitted for the partial fulfillment of the
MBA Pharmaceutical Management*

Academic year, 2016-2018



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CERTIFICATE

This is to certify that Ms. Shriya Wadhwa student of MBA Pharmaceutical Management has undergone internship in Portea Medical, Bangalore from 7th Feb to 7th May 2018.

The candidate herself completed the project assign to her during internship. Her approach to the project was sincere and proactive. This internship training is in partial fulfillment of the course requirements recommended for the award of MBA in Pharmaceutical Management.

I wish her success in all her future endeavors.


Col. (Dr.) Ashok Kaushik


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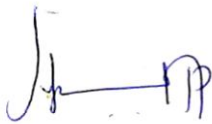
10-May-2018

TO WHOMSOEVER IT MAY CONCERN

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Conduct : Moderate

We wish her all the very best in her future endeavors.

For Portea (a Health vista company)



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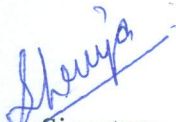
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CERTIFICATE OF ORIGINAL WORK

THE IIHMR UNIVERSITY, JAIPUR

CERTIFICATE BY SCHOLAR

This is to certify that the dissertation titled “ To Study Consumers perception about Home Healthcare services” and submitted by Shriya Wadhwa Enrollment No..0080....under the supervision of Mr. Abhishek Dadhich for award of MBA in Pharmaceutical Management of The IIHMR University carried out internship during the period from 7th February 2018 to 7th May 2018 embodies my original work and has not formed the basis for the award of any degree, diploma associate ship, fellowship, titles in this or any other institute or other similar institution of higher learning.


Signature

ACKNOWLEDGEMENT

An endeavor over a period can only be successful with the advice and support of well-wishers. The satiation and euphoria that accompany the successful completion of the project would be incomplete without the mention of the people who made it possible.

First of all, I express my sage sense of gratitude and indebtedness to our Dean, I would like to take the opportunity to thank and express my deep sense of gratitude to our President, Dr. S D Gupta for the timely kind co-operation and providing all the required facilities for our project.

I am also grateful to Dean of Academics Dr. Ashok Kaushik, and Dean of Placements Hem Bhargav, for putting their faith in me and giving me the wonderful opportunity of conducting my Dissertation at Portea Medical, Bangalore.

I would like to express my sincerest thanks to my mentor Mr. Abhishek Dadhich for his assistance, able guidance, encouragement, whole hearted cooperation and constructive criticism at each and every stage of the project.

I am extremely grateful to Mr. Darshith Satheesh for providing me with optimum assistance and guidance, which helped in seamless completion of the project.

Sincerely

Shriya Wadhwa

MBA PM-08

The IIHMR University Jaipur

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ACRONYMS/ABBREVIATIONS: -

List of Abbreviations

CAGR	Compounded annual growth rate
HHPS	Home Healthcare Provision Support
ADLs	Activities of Daily Living
COPD	Chronic obstructive Pulmonary Disease
IHHC	Indian Home Healthcare

INTRODUCTION

The Indian healthcare industry, valued at US\$ 65 billion (Rs. 4.36 trillion), is growing exponentially. In the next decade, increasing consumer awareness and demand for better facilities will redefine the country's second largest service sector employer. Healthcare in India today provides corporations with a unique opportunity for innovation, differentiation and profits.

In the future, the key challenge for the industry will be to meet healthcare needs across sectors, from coping with modern diseases to providing basic access to primary healthcare, public health engineering, disease surveillance and monitoring. Although healthcare challenges can vary from region to region, health systems around the world have the same objective: to finance and deliver the highest possible quality of care to the maximum number of people at the lowest possible cost. Indian healthcare is experiencing a new wave of opportunity. Providers are reinventing existing delivery models to bring healthcare closer to the patient.

India's healthcare market may see threefold jump in value terms to USD 372 billion by 2022, driven by growing incidence of lifestyle diseases and rising demand for affordable healthcare delivery systems, says a report. The report prepared by Assocham and research firm RNCOS said the value of the sector in 2016 stood at USD 110 billion and will see a compounded annual growth rate (CAGR) of 22 per cent. Besides, the medical devices market in India, which was valued at USD 4 billion as of 2016, is likely to cross USD 11 billion marks by 2022 on the back of growing geriatric population, uptick in medical tourism and gradual decline in cost of medical services.

Growing lifestyle diseases, rising demand for affordable healthcare delivery systems due to increasing healthcare costs, emergence of telemedicine, rapid health insurance penetration, mergers and acquisitions helping to reach untapped markets and government initiatives are driving healthcare market in India

ORGANIZATION PROFILE

Portea believes in providing hospital-quality healthcare in the comfort of your home. It provides doctors, nurses, and physiotherapists for home visits who have passed rigorous hiring standards and have had their backgrounds and medical knowledge verified by senior doctors. Also facilitate lab tests at home and medical equipment rentals, making health care more accessible for the patients.

VISION/MISSION

Portea Medical delivers quality care with compassion and brings world class medical care into the patient's homes and the aim is to make primary healthcare not only more accessible, but also more affordable and accountable to patient needs.

PORTEA HELPS

- Individuals receive high-quality, affordable, in-home healthcare
- Doctors, medical practices and hospitals offer high-quality post-operative and primary care, allowing a renewed focus on in-patient procedures and secondary and tertiary care.

Portea claims to be the biggest in-home care provider in India, with clinicians in 24 cities who make 60,000 in-home visits every month. It currently serves 50,000 patients, about 40 percent of whom are actively using its services at any given time.” The company's last fundraising was in December 2013, when it got a \$9 million Series A from Accel, Qualcomm Ventures, and Ventureast. Its new capital will be used to expand into South/Southeast Asian markets and boost its employee count from 3,000 to 8,000 over the next 18 months.

Like Honor in the U.S., Portea sends health providers to residences. The startup's verticals include routine checkups, oncology, maternity care, and palliative care, but its core consumers are the elderly.

Average life expectancy in India has increased dramatically over the past 50 years thanks to better medical care and nutrition. While people are living longer, India faces a major shortage of resources for geriatric care and the treatment of chronic diseases.

There is no concept of established elder care homes in India as yet,” says Portea’s co-founder and chief executive Meena Ganesh. “The public health system is dysfunctional and ‘personal pay’ is the dominant mode. Despite having the best doctors, care outside private tertiary care is pretty much non-existent.

Ganesh notes that even though half of India’s current population is under 30, the country already has over 100 million seniors, or eight percent of the population. That number is expected to jump to 324 million by 2050, or 20 percent of the population, with people aged 80 or older making up the fastest-growing group.

Traditionally, families care for their elders, but that dynamic is changing quickly as the birth-rate decreases and younger people move away from their hometowns. Since putting aging parents in institutions is still stigmatized, many households hire attendants. “Ganesh says that families often rely on services that are unregulated or employed carers with no formal medical training.”

Other companies have stepped into the breach including Healthcare at Home India, India Home Healthcare, and Nightingale’s. How Portea wants to set itself apart from other in-home care providers is by working with hospitals, pharmaceutical companies, and insurance providers so patients can continue their treatment regimens at home.

Furthermore, Portea has built its own tech platform, including mobile apps, to help its providers adhere to standard operating procedures, access diagnostic tools, share information, and keep records for each patient. Ganesh says Portea’s geo-fencing network divides each of its cities into separate segments to help manage and coordinate clinician visits and it uses an algorithm to match patients and providers. The Start-up is currently developing predictive analytics to help anticipate health issues in individual patients. Portea’s customers can access records and book appointments through its consumer app.

Home healthcare in India is a massive and strategic initiative for the country and addresses a huge gap,” says Ganesh. “There are huge opportunities, the potential to create millions of jobs is vast, and finally, it could be a major contributor to better health to Indians.

Portea Product

- Physiotherapy
- Doctor Consultations
- Pharmacy
- Nursing
- Nursing Attendant
- New born Baby & Mother care
- Lab Tests
- Gestational Diabetes Management
- Medical Equipment

Physiotherapy:

Portea' highly qualified and experienced physiotherapists create a customized physiotherapy treatment plan for patients from the very first visit, setting them on the road of recovery.

KEY FEATURES

- Recovery from Cardiac problems
- Post-Pregnancy Care & Pediatrics
- Care in Neurological Cases
- Care in Orthopedic Cases and more

Lab Tests:

Portea in-home lab services let patients keep a check on their health with a wide range of medical tests made available to them at homes.

KEY FEATURES

- Lab samples collected at your doorstep

- Lab reports delivered via email
- Test reliability assured with NABL certified partners

Nursing Services:

Portea highly qualified and trained nurses excel in providing quality medical care at the comfort of home.

KEY FEATURES

- 12-hr/24-hr Nursing
 - Post-operative nursing
- Treatment will be supervised by a senior doctor

Doctor Consultations:

Portea Medical offers in-home doctor visits by experienced doctors.

KEY FEATURES

- Patients are treated at home by an experienced doctor.
- Can have your primary physician stay in the loop. Portea will call your primary physician after the visit as well as send an email detailing about the visit.

Medical Equipment

With Portea, medical equipment purchase and rentals are made available at doorstep.

KEY FEATURES

- Beds and Mattresses
- Cardiac range medical equipment
- Mobility range medical equipment
- Respiratory range medical equipment

Trained attendants

Portea's trained attendants provide long term or short-term care to patients at home comforts and under the supervision of senior doctors and nurses.

KEY FEATURES

- Holistic support at home
- Packages are customized as per patient's needs
- Regular progress is mapped out and made accessible to patient and patient's family

New Born Baby & Mother Care at Home

A post-natal care program for patients to cope-up with the initial challenges of becoming a mother.

KEY FEATURES

- Mother Care - supportive medical care, help with lactation, massages, exercises etc.
- Baby Care - bathing and general hygiene, help with feeding, laundry etc.
- Coming Home Services - doctor visit at home or call advisory support on post-natal recovery.

Gestational Diabetes Management

Having Gestational Diabetes can expose the Mother and Baby to multiple risks, both in short and long run. Using Portea's Gestational Diabetes Program, one can now have a stress-free pregnancy!

KEY FEATURES

- Personal Health Coach
- Personal Nutritionist
- Smart Glucometer

Nutrition & Diet Consultation

Listed below are the key attractions of Portea's family nutrition program:

KEY FEATURES

- Our family nutrition plan is Health assessment for all the members on call.
- Setting health goals for each member of the family based on the health assessment.
- One common Meal plan for all members, snack plans as per member preference.

MANAGEMENT TEAM:

- Meena Ganesh, MD
- Ganesh K CO- founder.
- Vaibhav Tewari- COO
- G. Ramasubramani- CTO
- Deepti Bhaduria- Sr. VP Marketing
- Sachin Verma- VP Operations
- Saritha- Sr. VP (Human Resources)

Purpose & Learning through Management Training

Institutional learning has always proved beneficial in delivering the theoretical knowledge when a potential candidate endeavors the new career, but the exposure of implementing this learning into real practical environment through on the job training helps to put a foundation stone for the prospective candidate. Chances for work, its presentations and mistakes done during this period are something, which will not be forgot and repeated respectively. This is an opportunity to develop a deep understanding about the type of work a company offers, their limitation, indication contraindication, scopes etc.

The Purpose of this Management Training was

1. Learn more about the health care industry and healthcare Startups
2. Application of my learning understanding and experience of Behavioral understanding into my Project effectively.
3. Learning more about the field and the industry and the work profile and gain valuable work experience.
4. To decide the path through which I want to explore the Industry.
5. Gain valuable Networking Contacts.

Thus, Management Training becomes an integral part for MBA Pharmaceutical Management.

EXPERIENCE & LEARNING AT PORTEA HOME HEALTH CARE

I was appointed as Management Trainee in Portea Home Health Care for duration of three months. Internship at Startup Companies, like Portea, gave an opportunity to me to understand scope of Home Health Care, its growing need in the Health care sector to reduce the cost burden of Ill health & approach of Product/Services in Home Healthcare Business. However, being at one place the variety of challenges a home healthcare at such nascent stage is facing has filled me with immense knowledge and kept my excitement high to learn and discover the kind of projects it does throughout. Working here, I discovered that the horizon for the candidate working in Startup is wide and expanded and is not limited to a section of a health care. I realized the importance of remaining updated about our own field, present market statistics and thus importance of reading and updating the knowledge and skills timely. Apart from work, how the recent Startup like Portea has an integrated systemic management and information technology for each and every employee is commendable. Learning the system itself was a type of new learning other than the usual project work.

LEARNING FROM INTERNSHIP:

About the Organization:

- Scope and work of Home Health Care
- Technology
- Product Management- Sales, Operations and Business Strategies & Model.
- Client Engagement
- Ethics Compliance

REPORT

Introduction

Palliative care is an evolving area of medicine with prospective to affect positively many chronically ill patients. One of the most important goals of health care is ensuring that ill, elderly, and disabled patients receive high quality, personal, and compassionate care. Home health care is intended to meet these needs by offering personalized service in the convenience of a patient's home/ door steps. Unlike developed countries, home healthcare provision systems (HHPS) are not widely prevalent in developing countries like India. The number one benefit of home health care is that it allows patients to receive personal care in the privacy and comfort of their own homes. For aging and homebound individuals, in-home care facilitates them in remaining as functional and independent as possible, providing a much higher sense of security and dignity. Receiving home health care helps to reduce inevitable readmissions to the hospital, and studies have shown that patients recuperating from illness, injury, or surgical procedures heal more quickly and successfully when recovering at home versus in a medical facility.

Family members often serve as the primary caregivers to their ill or elderly loved ones. Home health care provides needed assistance to family caregivers, allowing them to get back to their lives and enjoy more quality time with their homebound loved ones. Moreover, with in-home care, families that are unable to serve as primary caregivers have the benefit of knowing that their loved ones are receiving professional, compassionate, and personalized care in the convenience of their own homes.

Home-based health care in India is gaining traction and is poised for revolution. Once an unorganized and fragmented sector, it is fast catching the attention of entrepreneurs and investors and becoming an organized, technology-led industry with standards and protocols. Still it is observed that the conventional thinking pattern, beliefs and attitude of Doctors and Patients especially who have not been exposed to such services have been a major hindering factor for the acceptance of approach a home health care.

OPERATIONAL DEFINATION:

Home Health Care: **Home care**, (also referred to as **domiciliary care**, **social care**, or **in-home care**), is supportive care provided in the home. Care may be provided by licensed healthcare professionals who provide medical treatment needs or by professional caregivers who provide daily assistance to ensure the activities of daily living (ADLs) are met.

In-home medical care is often and more accurately referred to as "home health care" or formal care." Often, the term **home health care** is used to distinguish it from **non-medical care**, **custodial care**, or **private-duty care** which refers to assistance and services provided by persons who are not nurses, doctors, or other licensed medical person .

Review of Literature

The home healthcare industry is comprised of many different medical services that are available to patient at home or facility. There is home health, nursing home care, caregiver services, palliative care, and many others. These services are managed by an even more increasing and diverse set of medical professionals. Although, there may be many options available but the reality is you can seemingly get all your medical needs in the comfort of your home.

The Growing Desire of Home Health Care Services

The two key elements in this equation can be summed up in two words "Home" and "Care". They are the vital reason why home healthcare is becoming so very important in our society. These two factors determine the desire and need for the services. Considering the first part of the equation "home", A new poll by Bring the Vote Home, surveyed 4,533 registered voters aged 65 and older. The poll showed the result that American seniors overwhelmingly favor Medicare home health services. In fact, 91% of American citizen favored the Medicare home health benefit, which provides care to 3.5 million Medicare beneficiaries. 87% of American seniors prefer to receive medical treatment at home/ door steps. The numbers show more people do desire to receive their treatments at the comfort of their home.

The Benefits of Home Health Care Services

“The RAND Corporation, a nonprofit research firm, studied knee and hip replacement patients who were discharged from an acute care hospital to their home for either home health rehabilitation, outpatient therapy, or none formal continuing medical care. The study found that 35 % of patients who were discharged to their home or received home health care were less likely to be institutionalized than in other health care settings.”

Many studies have also shown an increase of mental health for individuals 65 and above, who reside in the home versus a facility. A program in Connecticut for psychiatric patients was even effective in reducing hospital re-admissions by incorporating home health care into the treatment plan.” Patients who received home care services had a significantly reduced readmission rate of 11.8 % compared to 45.9 % re-admission rate who did not receive home care services.

As mentioned the benefits for home health care can be seen in the access to medical staff and treatment, the desire to have medical services at home, and the benefits of familiar settings when treating certain ailments; so what about the second element in our equation is “Care .

The Growing Need for Home Health Care Services

The “Care” element in the home care equation includes the increasing need for home health care services that has been sparked by a growing elderly population. According to the U.S. census the population aged 65 and older projected to increase to 19 percent by 2030. To put this into reference the oldest age group in the United States is projected to grow to reach 19 million. The need for home care services will be drastically increasing. Home health care agencies will need to be able to effectively accommodate this need with services and staff. “According to the Bureau of Labor Statistics’ the home care sectors picked up 30% of the 2013 august health care job growth. With the staggering increase in demand for services home care agencies will need to pick up more Professionals.” This will also come with the need to pick the best staff to ensure quality services so organizations can stand out in a pack. That is why home health care agencies

like Portea Home Health Care and Nightangle through rigorous testing and evaluation to ensure their¹ staff is certified and trained to provide the best possible care.

“As an industry, home health care services, is a very important segment of our society. With such a huge desire for home care services and the large rise in the need for services home care agencies will need to provide the highest standard of services.”

The primary benefits of the home health care include:

- Delivered care in the comfort of the patient's home
- Easier for family and friends to visit the ailing loved one
- Promotes healing and provides more safety from Nosocomial infections
- Allows more freedom, independence and psychological support
- Equally or More affordable than inpatient care
- Tailored to the requirements of each individual patient
- Reduces Re-hospitalizations

Home care services should include:

- * Observation and Assessment
- * Wound care
- * Pain management
- * Medication and disease education
- * Physical therapy
- * Speech therapy
- * Occupational therapy
- * Dietary management/education

¹The Growing Importance of Home Health Care Services by Aaron Bodie, March 4, 2015
(<https://assistedcares.com/growingneedforhomehealthcare/>)

1. Benefits of Home Health Care, by Haven Home Health (<http://www.havenhomehealth.com/Benefits-of-Home-Health-Care.htm>)
2. Home Health Care in India: In Search of the Right Business Model by Knowledge Wharton, Sep 11, 2014
(<http://knowledge.wharton.upenn.edu/article/home-health-care-india-search-right-business-model/>)

* Psychiatric care

* Master's-level Social Worker

A recent paper by consulting firm Pacific Bridge Medical records that the global home health care market, which includes devices, products and services, was worth almost \$215 billion in 2013 and is projected to grow at 8% per annum until 2020. Pacific Bridge Medical estimates the Indian home health care market at around \$2.3 billion and growing at more than 18%. According to Mahendran Balachandran, a partner at venture capital fund Accel Partners, which has invested in Portea Medical, a Bangalore-based home health care firm: “The home health care market in India, currently estimated to be a \$2 billion to \$4 billion-a-year opportunity, is driven by an aging population, the increasing prevalence of chronic diseases and the need for superior quality post-operative and primary care.”

Devi Prasad Shetty, a cardiac surgeon based in Bangalore and founder of the Narayana Health Group (formerly called Narayana Hrudayalaya) suggests, that with life expectancy increasing significantly in India, “home health care is becoming mandatory. Patients who are suffering from chronic illness like heart failure, respiratory failure and Alzheimer’s do not really need hospitalization but specialized home related medical care. With advanced medical gadgets, most of the patient monitoring, which was earlier possible only in hospitals, can now be offered with significant ease at home.”

India stands second largest in terms of geriatric population in the world. According to a United Nations Population Fund report, number of people age 60 and over in India will increase from 100 million in 2011 to 300 million by 2050; this means one in five Indians will be above the age of 60. Out of those 300 million over-60s, 200 million are likely to be suffering from chronic ailments.” Already, non-communicable diseases including cardiovascular diseases, diabetes, COPD and cancer cause around 50% of all deaths in India .

“With life expectancy increasing significantly in India, home health care is becoming mandatory.” –Devi Prasad Shetty

The concept of old-age homes is socially largely unacceptable in India and therefore better home-based health care facilities are becoming an imperative. It is estimated that for an average

individual, 70% of health care needs can be met in the home environment. This would result in better health outcomes and lower medical costs for the patients.

Rana Mehta, executive director and leader of the health care practice at PwC India, sees the growth of home-based care as a part of the expanding spectrum of health care services in India. This ranges from government-run primary health care centers and private family physicians to ²large hospital chains, luxury services and telemedicine.” He points out that as a country is moving up the economic ladder, different pockets of the population demand different services.

“As a result of advances in communication and medical technology, a lot of interventions that could earlier take place only in hospital settings are now becoming possible in the home environment,” Mehta says. “Alongside, there is now a sizable population in India that needs and is willing to pay for these services. This makes it a viable business proposition for entrepreneurs and their investors.” Arnab Mukherjee, a professor at the Center for Public Policy at the Indian Institute of Management in Bangalore adds: “As this market grows, there is an increasing realization that profit streams can be huge and long-term, and lead to large returns on capital invested.”

Entrepreneurs on the Trail

Meena and K. Ganesh, a well-known entrepreneur couple in India. In January 2011, they sold their pioneering online education business Tutor Vista to the world’s largest education company, the U.K-based Pearson, for \$213 million. The duo then started considering for the “next disruptive model” and zeroed in on home health care. “We wanted to do something of size and scale where we could create a social impact using our strengths in technology and the Internet,” K. Ganesh notes. “From our personal experience, we knew that home health care service in India was totally inadequate. We analyzed the space and were convinced that there was a billion-dollar opportunity for us.

In September 2013, they acquired the fledgling “Portea Medical” from its New Delhi-based founders.” Post-acquisition, they raised \$8 million from Accel Partners and Ventureast. In July,

3. ² Home Health Care in India: In Search of the Right Business Model by Knowledge Wharton, Sep 11, 2014
(<http://knowledge.wharton.upenn.edu/article/home-health-care-india-search-right-business-model/>)

Portea Medical raised a strategic investment from Qualcomm Ventures, the investment arm of the U.S. tech firm Qualcomm Inc

Portea's service offering includes geriatric care, post-operative care, palliative care, primary care and physiotherapy etc. It also provides collection of lab samples, home delivery of medicines, and medical equipment for hire.

Earlier this year, Vishal Bali, former Group CEO of Fortis Healthcare, teamed up with Ferzaan Engineer, chairman of health care research firm Cytespace Research to set up Medwell Ventures, a "specialty" home health care company. Medwell is funded by the duo and a few high net-worth individuals. Bali and Engineer plan to raise and invest \$15 million to \$20 million over the next three to five years. Their first move was to acquire the Bangalore-based Nightingales Home Health Services, which offers elder and nursing care with a range of services like physiotherapy, injections, wound care and post-operative care. "At present, Nightingales has a team of 150, provides 53,000 patient bedside nursing days per annum and has a subscriber base of more than 5,000 families for its annual care plans.

"Specialty home health care will be a key element of patient-centric care in the coming years." – Vishal Bali

Over the next two years, Bali and Engineer plan to establish a network in 10 Indian metro groups serving more than one million families. More importantly, they are viewing to expand Nightingales' services to specialties such as pulmonology, cardiology, metabolic diseases, neurological health, orthopedics, geriatrics, rehabilitation and post-operative surgical site management. "Our plan is to transform Nightingales from home nursing to a specialty home care company with a strong focus on chronic illnesses. We believe that specialty home health care will be a key element of patient-centric care in the coming years," says Bali.

Last September, Bayada, one of the largest private home health firms in the U.S., took a 26% stake in India Home Health Care (IHHC) a Chennai-based firm started in 2009. According to IHHC president Anitha. Other recent entrants in this space include Healthcare at Home, which is supported by the Burman family of the Dabur Group, and Homital Medcare. Some large hospital chains like the Manipal Group and Max Healthcare have also started providing this service either on their own or through partnerships with standalone providers like Portea. Most service

providers have a dual revenue stream covering annual or monthly subscription fees and a per-interaction fee.

Unlike in developed countries, home health care in India is not covered by most health insurance policies and company. “According to PwC’s Mehta, organized players will bring in credibility, standards and accountability that have been lacking in this area in India. This could encourage health insurance companies to cover home health care giving a further boost to this sector. Organized firms are also expected to bring scale, which will result in cost benefits for the entire model.

Medwell’s Bali and Portea’s Ganesh note that technology will play a vital role in their success. Home health care is not a high margin business and in order to be profitable, it has to be at scale; strong execution capabilities are also critically important. This is possible only with the effective use of technology across every aspect — be it scheduling of appointments and other logistics to manage remote workers, having standardized care protocols, catching and analyzing patient data, and continuous monitoring for error-free and personalized treatment.

Some of these firms are also assessing wearable medical devices and plan to offer them as part of their service or work with manufacturers to define care protocol standards. These devices can record patient data in actual time and can trigger alerts in the system for quick and pre-emptive actions.

According to PwC’s Rana Mehta, organized players will bring in credibility, standards and accountability, which have been lacking in this area.

Mukherjee of IIMB records that the home health care delivery system is an “important but underdeveloped component” of the larger health care delivery system in India. “Similar systems in many countries, such as in Sweden, play a critical role in reducing costs of care, and in decongesting hospital systems by helping patients leave earlier,” Mukherjee notes. “A side benefit is that with better home management of chronic care, the patient is able to come to the hospital at an early stage of the disease and receives less intensive and sometimes even less invasive care” Arockiasamy of IHHC says: Home health supports the hospital systems by reducing the average length of stay and [enabling] quicker turnover of patients.

Obstacles to Overcome

But delivering health care at home has its own challenges. “Service providers need to ensure that there is consistency in quality and continuum of care for the patients,” says Accel’s

Balachandran. Pointing to cancer care in particular, David Kerr, professor of cancer medicine at the University of Oxford records : The obvious advantages are that the service can come to the patient, rather than vice versa. This makes a difference to patients’ quality of life given the range of side effects from anti-cancer therapy. But Kerr adds that it also needs “strong management, medical oversight, and high-quality chemotherapy nurses supported by a quality controlled pharmacy. We need clear, evidence-based treatment protocols that cover the range of protocols delivered by the team.

Shetty of Narayana Health says that one of the biggest problems in expanding home health care services in India is the lack of skillful manpower. “The Indian educational system presently does not have a structured training program for home health care,” Shetty notes. “Unless there is vocational training for para-medical services, a strong home health care system will remain a reserved reality.

K. Ganesh points out that the capacity to handle last-mile logistics and remote health care workers is critical for effective home health care delivery. He advocates that specialized players are more equipped to offer this service than hospitals because the core competencies and business models are very different. For hospitals, the singular metric of profitability is average revenue per operating bed, which depends on the average length of stay of a patient,” he says.

Typically, hospitals make the maximum money per patient in the first 48 hour to 72 hours of admission. It is a high margins model. Home health care is a different business model. It is a volume game.” Pointing out that disruptive models typically come from new players, Meena Ganesh says: “It can never be done by incumbent players because of legacy and mindset.

Mehta agrees: Big players are not focused on home health care because the revenue model is very different. It requires a different mindset and a different business model.” Oxford’s Kerr adds: “I think that we need specialist groups providing these services as the large hospitals are under great pressure to deliver their own services without taking on any further duties.

Shetty, however, offers a differing view. He says that home health care in India can be better provided by the big hospitals since they have extensive trained and skilled manpower. They also have well-built infrastructure for training and monitoring. “In the Western countries,

standalone home health care providers are becoming very popular. But for a standalone home health provider to deliver this service in India will be difficult and expensive.” In Shetty’s view, “to begin with, hospitals in India will tie up with standalone home health providers. But this relationship will continue only until this service becomes a significant part of the hospital’s offering.

Balachandran advocates that business models that coexist with the current health care systems and networks in India will be the key to success in this market. “Very often we see companies trying to work outside of the health care referral networks that exist today and quickly fade away.” Adds PwC’s Mehta: “The biggest challenge in home health care in India is discovering the business model that will work here.

Statement of problem:

- With the growing health care burden and cost of illness do the health care stakeholder i.e. Consumer realizes the importance in the delivery of health care at home both as a cost-effective manner and quality efficient ?

AIM:

To Study the Consumers Perception about Home Health Care Services

Objectives:

- To study the factors influencing the choice of consumers to use Home health care services.
- To study the benefits and challenges of Home health care services with respect to consumers perception.

Research Methodology:

MATERIAL AND METHODS:

- **STUDY DESIGN:** Descriptive- Exploratory Study

- **AREA OF STUDY:** Home Health Care Organization- Portea Medical, Bangalore
- **DURATION OF STUDY:** 3 months
- **SAMPLE SIZE:** A random sample of 100 Patients was taken through Non-Probability, Convenient Sampling.
- **SAMPLING TYPE:** Non Probability (Convenient sampling.)
- **SAMPLE SELECTION:**
 - **INCLUSION CRITERIA:** Patients/Consumers who have already availed Home health care services.
- **DATA COLLECTION PROCEDURE:** Primary data was collected through telephonic interview and then it was analyzed for the results and conclusion.
- **DATA COLLECTION TOOL:** In Depth questionnaire for telephonic interview of the Respondents.
- **DATA ANALYSIS PROCEDURE:** Analysis includes three concurrent flows of actions- Data reduction, focuses, simplifies, and transforms raw data into more manageable forms. Data display- which presents the data as organised and compressed assemblies of information
- **ETHICAL CONSIDERATION:** Informed consent was taken before starting the study; if anyone disagreed to become a part of study he/she was not forced. Participant's confidentiality was maintained.

Results & Discussion:

Data Analysis

Patients:

Major Reasons for the patients to select Home health care services included-

Primary Reasons

- They feel more Comfortable & convenient recovering at their home, Also it is easier for them to get all the services available at home in spite of travelling and going back to the Hospitals to avail these services
- The time that is wasted in going to the Hospital is reduced and they don't have to wait for their turn to come in the hospital, which saves a lot of time for them.
- Patients feel better and easier in recovering at their home rather than a Hospital setting.
- Also, Patients are of the thought that they feel hygienic in their own surroundings where there are minimal chances of getting any infections.

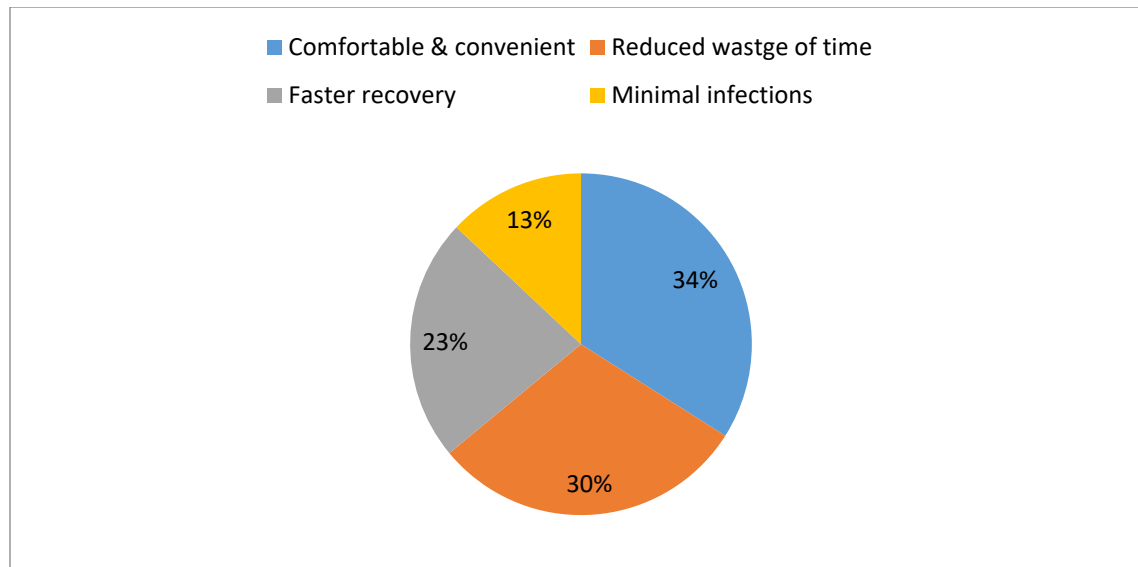


Figure 1: Reasons for Selecting Home Healthcare Services

Secondary Reasons

- Being surrounded by their family members and loved ones makes it easier for them to recover emotionally.
- Home care allows them with the maximum amount of freedom and they feel they can be engaged in the daily activities too.

Awareness about Different Home Care organizations

Interview with the patients revealed that the awareness level about the Home health care services is increasing among the people as they seemed to be aware of the concept of home health care along with which they have taken the services from multiple places apart from Portea Medical such as Apollo Home health care, Nightingales, Kites, Health care at Home. But still the portion of people who have not taken it from multiple places is more, which clearly means there is a long way to go for the Home Healthcare organizations to spread their business and get known more by the consumers.

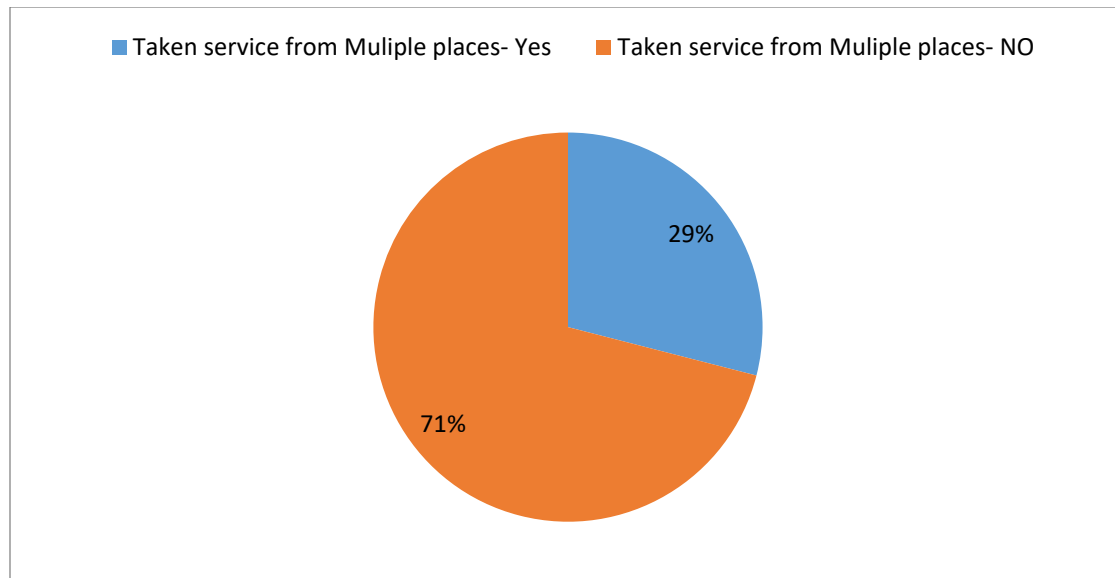


Figure 2: Level of awareness regarding Home Healthcare Services

Some **Particular things/Factors which people consider before selecting a suitable Home health care** according to their views included-

Primary Reasons

- **Quality of services-** Quality of the services should not be comprised as this is something which is dealing with the health of the patients, so their topmost choice is quality which includes Hygiene to be maintained at its best level.
- **Timely Availability-** Consumers prefer going for the homecare which can provide them the services on a timely manner, because this is the reason only why they are engaging with the home care organizations, so availability at proper time is a must factor for the patients which can further reduce the wastage of their time.
- **Affordability/Cost-** Cost is not an issue if the quality is maintained, according to the patients. They are willing to pay if they are getting quality services at the comfort of their homes, but there are fewer people who are not in condition to afford the prices and expect prices to be little affordable for them.

Secondary Reasons

- Meeting the needs- Before selecting a Home care provider people do want to satisfy that whether their needs are met by engaging with the home care and the services they need are available or not.
- Professional staff- Staff who would be delivering the services should be highly professional and must be well aware of the tasks that he/she has to perform and must deliver it in the most appropriate manner without any harm or misconduct to the patient.

And the things that impresses the consumers about the Home health care services includes Convenient Services, Home comforts & Care, Quality, timely availability of their reports that too at the comfort of their homes.

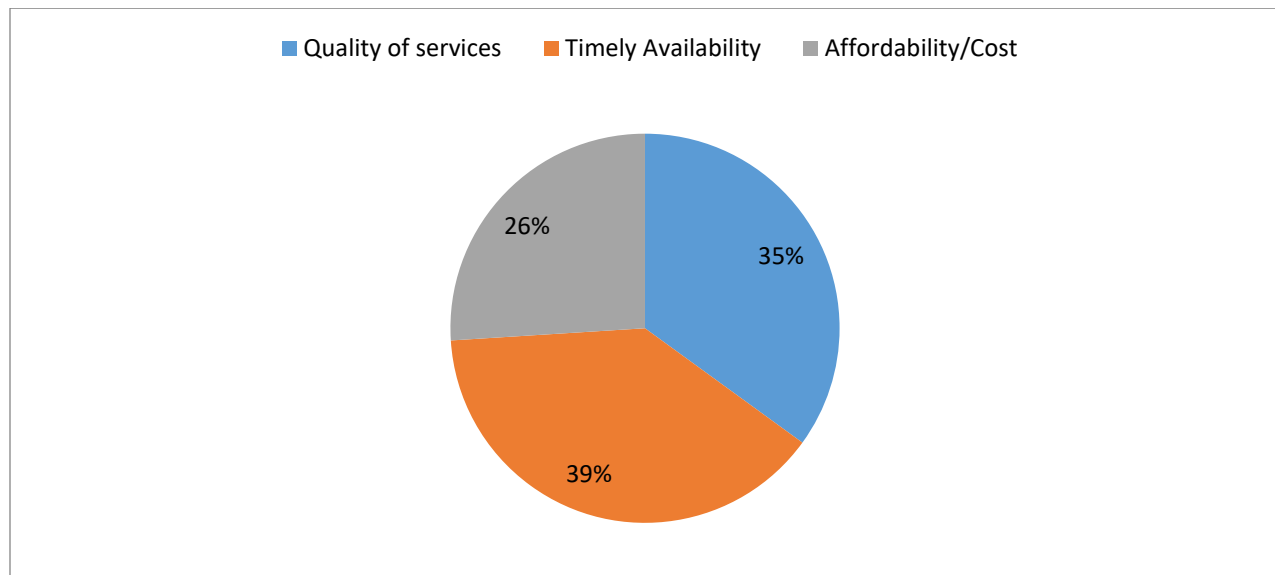


Figure 3: Performance sectors of Home Healthcare Services

Different Services for which consumers use Home health care services

For various services such as Physiotherapy, Lab tests, Nursing attendants, Doctor consultations, Mother& Baby care, Nursing etc. patients have taken the services, the major reason being they feel comfortable in getting treated at their home made them select a suitable Home health care organization for these services. Most of the consumers have used such kind of services quite often for themselves or their family members once they get familiar about it as they find most convenient to get it at the comfort of their homes.

Accessibility of Home health care services

When asked them about whether it is easy for them to book an appointment with the Home health care organizations or how accessible these home care organizations are, consumers expect to be able to conduct errands online. If you're not making it as easy as possible for patients to book with you wherever they are, whenever they want, you're missing conversion opportunities . They are definitely finding it easier to book appointments and reaching out to such home care organizations where the entire process of booking is dependent on the advanced technology & applications. Patients don't have to trouble themselves for a booking and can do that with simple click on the app at their phone or with a phone call. Within no time their request is registered and provided at their doorstep to them unlike in the Hospitals where they have to wait for long in the waiting area for their turn and consultations. So according to consumers who have used these services it is very easy to get engaged with such Home cares.

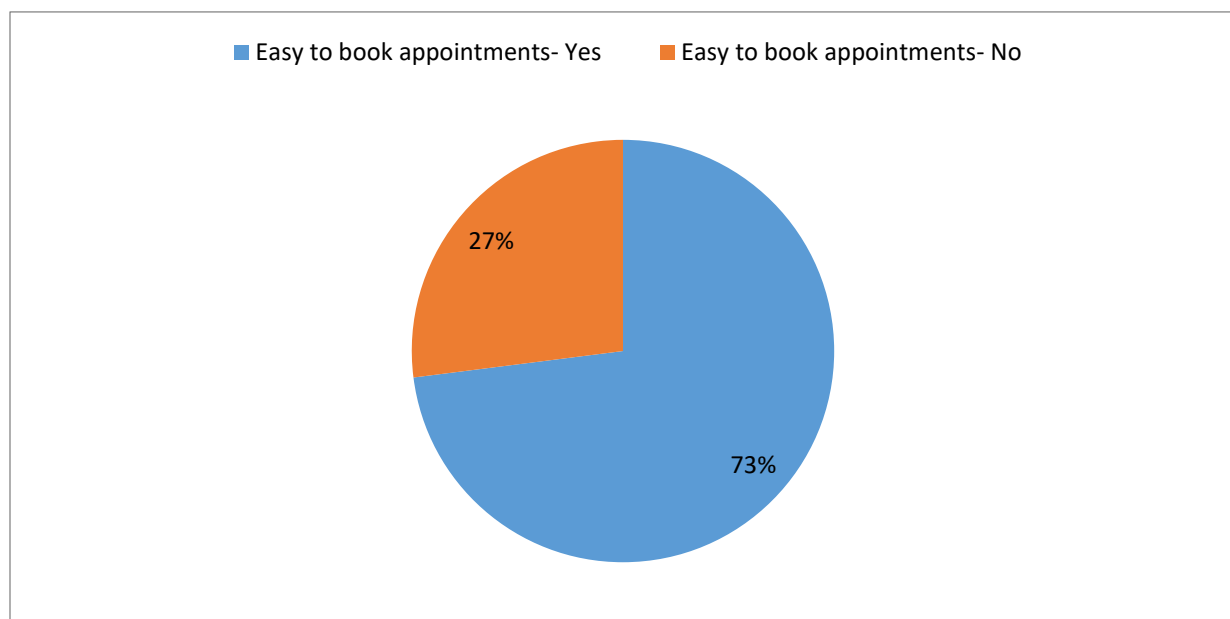


Figure 4: Accessibility to Home Healthcare services

Challenges of Home health care

Few disappoints or challenges that consumers went through includes-

- Although they find it convenient and comfortable, along with which they complained the staff which was assigned to deliver the services was not skilled and professional in delivering the services so they had to replace the staff with a better one.
- Few of them complaint about Prices/Cost of the services, consumers are of the views that prices of some services are very high even for a person who can pay for it, so one can expect it is not possible for a person who doesn't have that much funds available to afford such a service. Consumers complained of the extreme high prices of the services and expect the home care organizations to understand their concern and reduce it Upto some extent.
- Unavailability of staff, for some of them this was also a Challenge as when they wanted to book an appointment or were in the need of a particular service, there was no availability of the staff. Health care companies have to keep in pace with the availability of staff in coming time as awareness among the consumers and the demand both is increasing, to keep up with such a increasing demand they have to maintain adequate staff available all the time.
- Quality of service, although a very few but customers complains of quality of service also. They complained that the service which was delivered, the quality standards were not Upto the mark. Consumers have high expectations from Home care setups as they are known for their quality standards, be it any home care consumers expect high quality standards for the cost which they are paying. Therefore, it is very necessary for the Home care setups to main that continuity every time when a service is delivered.

Consumers Satisfaction for Home health care services

Majority of People/consumers seems to be satisfied and their experience is also good with the home health care services that they have taken and rated their satisfaction level as very good because of the fact that home health care prevents them from struggling in the hospitals for their consultations, availability of the reports and there is no wastage of time that happens. They are willing to continue taking it in future also because of the comfort and convenience which they have got. Some people quoted that they were not aware earlier

but when they got to know about such kind of services, the experience they had was extremely nice and would positively prefer recommending this to their family & friends.

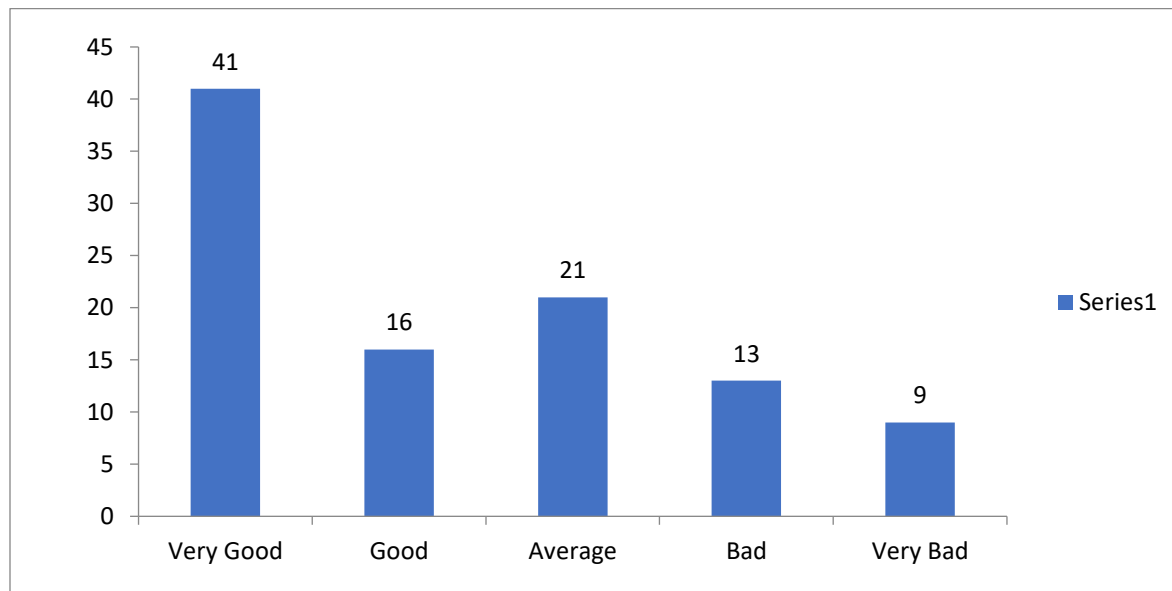


Figure 5: Consumers Satisfaction from Home Healthcare services

Conclusion:

According to the views of the patients the number one benefit of home health care is that it allows patients to receive personal care in the privacy and comfort of their own homes. For aging and homebound individuals, in-home care facilitates them in remaining as functional and independent as possible, providing a much higher sense of security and dignity. Receiving home health care helps to reduce unavoidable readmissions to the hospital, and patients recuperating from illness, injury, or surgical procedures heal more quickly and more successfully when recovering at home versus in a medical facility.

Patients find it more convenient and they can avoid the extra cost of getting hospitalized where their recovery will be much slower as compared to their homes. Safety is also one reason for choosing home health care. Patients living alone are at risk of living by themselves. A lot of seniors have mobility problems and are often at risk of falling which can inflict injuries. With home care, someone can be there to monitor and assist your loved one, safeguarding their health and safety.”

Patients choose such home care organizations because quality of home healthcare is the one-on-one attention they will receive. While at home there is complete attention on them. This is important because it creates a special bond between the Patient and the caregiver. At many nursing homes, the caregivers must care for a number of different patients so there is not enough one on one time to create this special relationship.

Challenges that people still face about the home health care services include affordability, everyone is not able to afford the costs because of which in spite of the fact they are willing to take it but they end up not taking. As the demand is increasing day by day, there are times when due to unavailability of the staff consumers don't get the services on time due to which they have a negative feedback in their mind. As the entire concept of home health care is based on the technology, people sometimes also face some sort of communication issues where what they demanded is replaced by thing which is not needed. All Home health care organizations have to cope up with all such issues so that these sorts of challenges which still exist could be solved and everyone can have the access to the services.

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ANNEXURE A

In- Depth Questionnaire-

Q1-Why did you choose for Home Health Care Service?

Q2- Have you taken Home Health care services from multiple places?

Q3- What are the things you look before selecting a suitable Home Health care Service?

Q4- When was the last time you took home health care service and for what Service?

Q5- Was it easy to schedule an appointment for Home Health care service?

Q6- What impressed you most about the home health care services?

Q7-What disappointed you most about the home health care services?

Q8- What is your satisfaction level with the home health care services that you have taken? What is the Reason of your Rating?

Q9- How has been your overall experience with Home health care services that you took?

Q10- How likely would you recommend Home Health care services to a friend or Family member?