



NEED OF HEALTHCARE SERVICES AT HOME AND ITS CURRENT AVAILABILITY IN INDIAN HEALTHCARE SECTOR

GUIDE: Dr Monika Chaudhary
PRESENTED BY: Parul Sharma



What is healthcare services at home?

Healthcare services are type of supportive care services being provided at home by healthcare professionals which can be either medical treatment needs or professional caregivers who provide support for day to day activities. These services for example can be nursing services at home, healthcare attendant at home, therapeutic services. This kind of care at home is provided by physical therapists, occupational therapist, licensed nurse, physical therapists.



Bringing world's
best clinical care
to your home.



WHEN DID IT START?

- First homecare program was initiated in US, in 1796 by Boston dispensary
- First visiting nurse service dates back in 1886 in United States.
- Effectiveness of Medicare in 1966 revolutionized home care by changing it into medical model than a nursing model of practice.
- With evolution of DRG payment system and Medicare, there was a shift seen of patients from hospital to home, leading to the concept of **HEALTHCARE SERVICES AT HOME.**

NEED OF HEALTHCARE SERVICES AT HOME



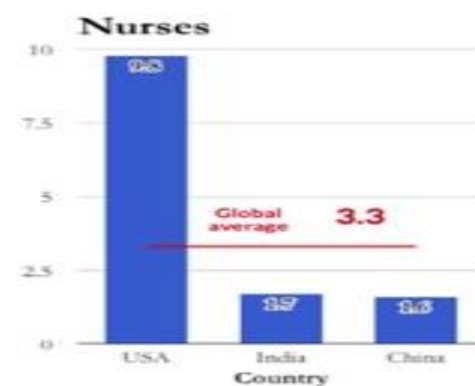
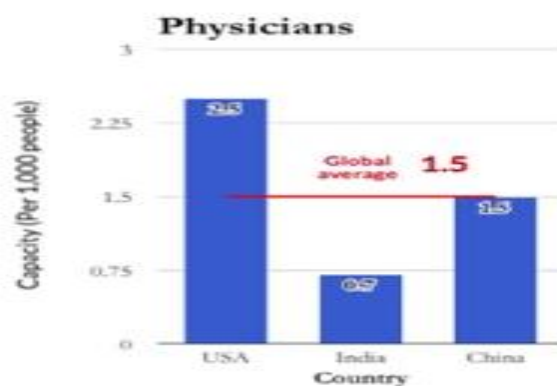


LACK OF INFRASTRUCTURE

“

The country is 81 percent short of specialists at rural community health centers and the private sector accounts for 63 per cent of hospital beds, according to government health and family welfare statistics.” India compares unfavorably with China and the US in the number of hospital beds and nurses.

Capacity And Infrastructure Shortfall



Infrastructure Shortfall (India Only)

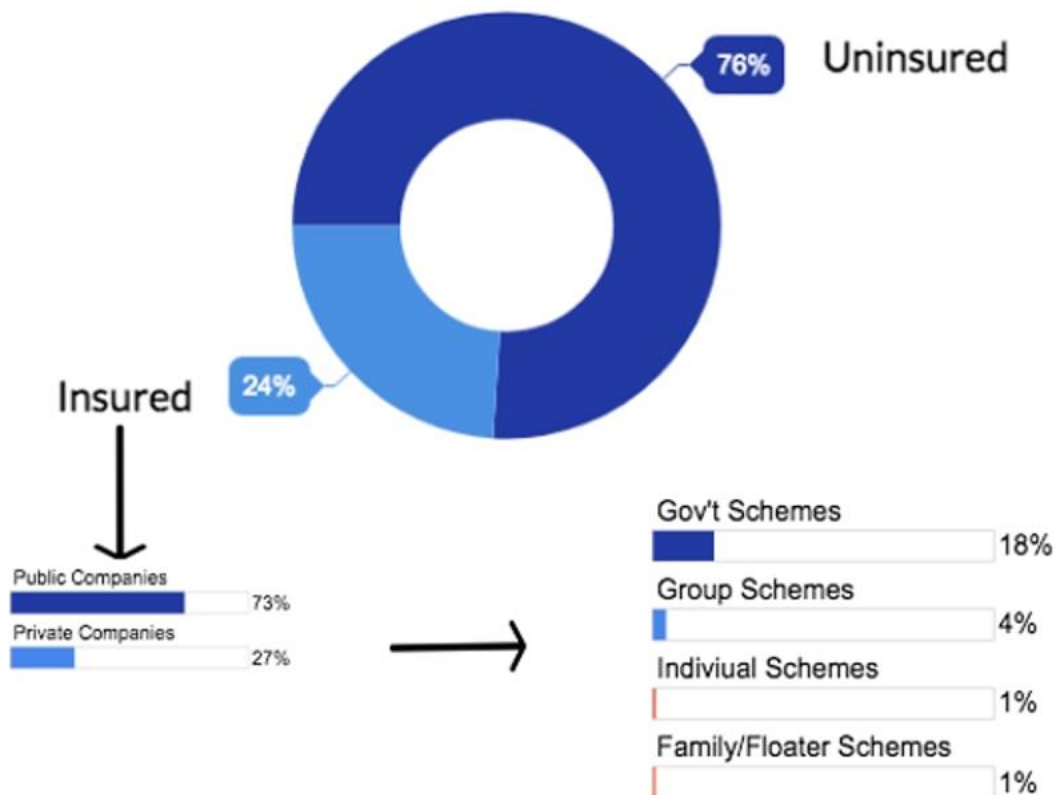




HIGH OUT OF POCKET EXPENDITURE

Increasing out-of-pocket expenditure for health availing health facilities in hospitals . The ability to spend Rs 47 per day in urban areas, Rs 32 per day in rural areas — continues to rely on the under-financed and short-staffed public sector for its healthcare needs, as a result of which these remain unmet. India's constitution guarantees free healthcare services to its citizens, but in practice private healthcare sector is performing, which makes India one of the highest out of pocket expenditure country in healthcare industry. OOP makes 62% of total health expenditure.

Health Insurance Coverage



Increasing non-communicable diseases



Non-Communicable Diseases



Cardiovascular
Diseases



Diabetes



Chronic Respiratory
Diseases



Cancer



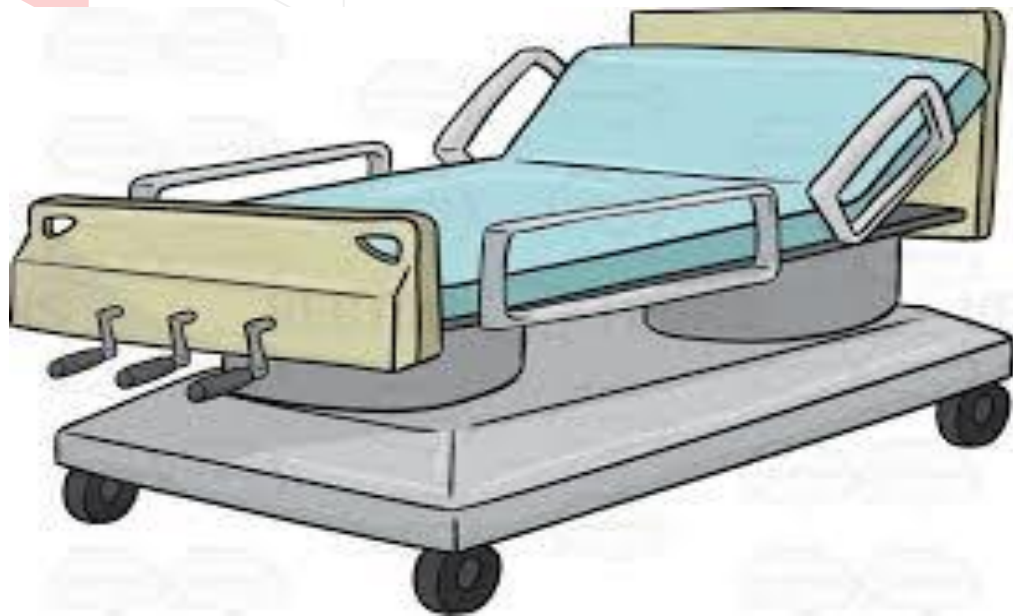
Changing demographics of the country- Increasing 60+ population. India's 60+ population is expected to grow with numbers of over 300 million by 2050

PROFILE OF AN OLDER COUNTRY



- 144 million Indians are of 60-plus years
- 60-plus is the world's largest growing age group
- By 2013, India will be the country with the most aged population
- Chief reasons for this: increase in life expectancy, decrease in fertility
- By 2025, one in every five Indians will be a senior citizen
- 70% of India's old live in villages

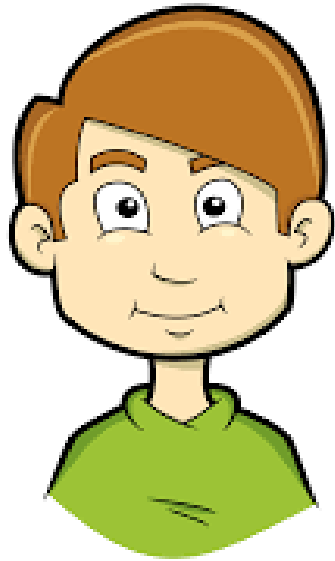
As per WHO, 0.9 bed is available per 1000 patients, leading to not even a bed for a patient.



Deficiencies in healthcare system

- ▶ Affordable healthcare delivery system.
- ▶ Well developed healthcare infrastructure.
- ▶ Increased number of medical and paramedical professionals.
- ▶ Availability of healthcare services at right time, right place, right person.
- ▶ Advanced healthcare services and models to serve the population of country.
- ▶ Rapid health insurance penetration.
- ▶ Mergers and Acquisitions.

HEMOCARE





Lets Understand The Current Healthcare Services At Home In India

OBJECTIVES

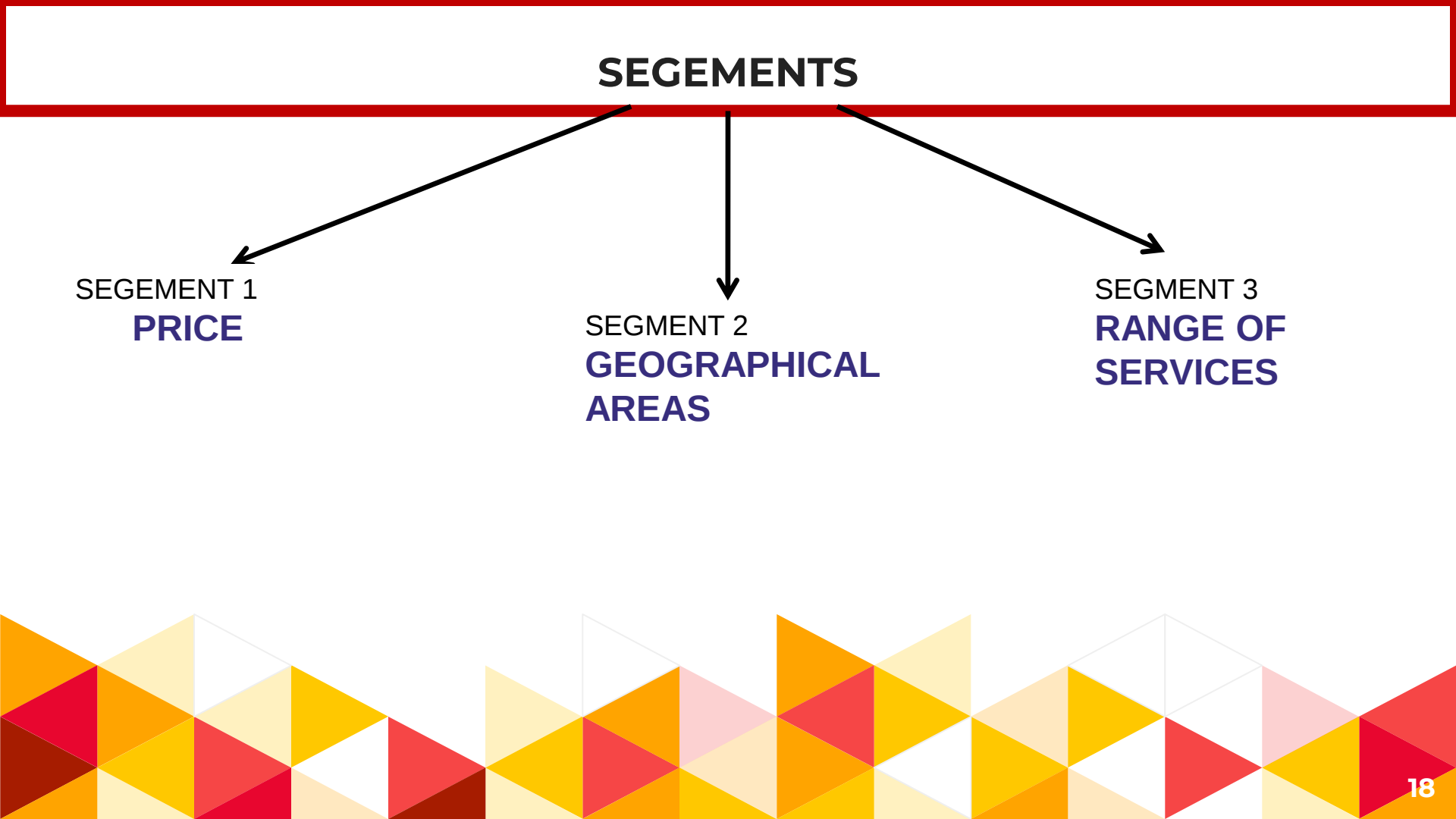
- To study the current homecare market in Indian healthcare sector
- To assess competitive position of organization(hcah) in current Indian healthcare sector.

Market Analysis

METHODOLOGY

- **Identify current and potential competition(secondary data)**
- **Gather competitive information**
- **Analyze competitive information**
- **Determine your own competitive values**

SEGEMENTS



```
graph TD; A[SEGEMENTS] --> B[SEGEMENT 1<br/>PRICE]; A --> C[SEGMENT 2<br/>GEOGRAPHICAL<br/>AREAS]; A --> D[SEGMENT 3<br/>RANGE OF<br/>SERVICES];
```

SEGEMENT 1
PRICE

SEGMENT 2
**GEOGRAPHICAL
AREAS**

SEGMENT 3
**RANGE OF
SERVICES**

FINDINGS

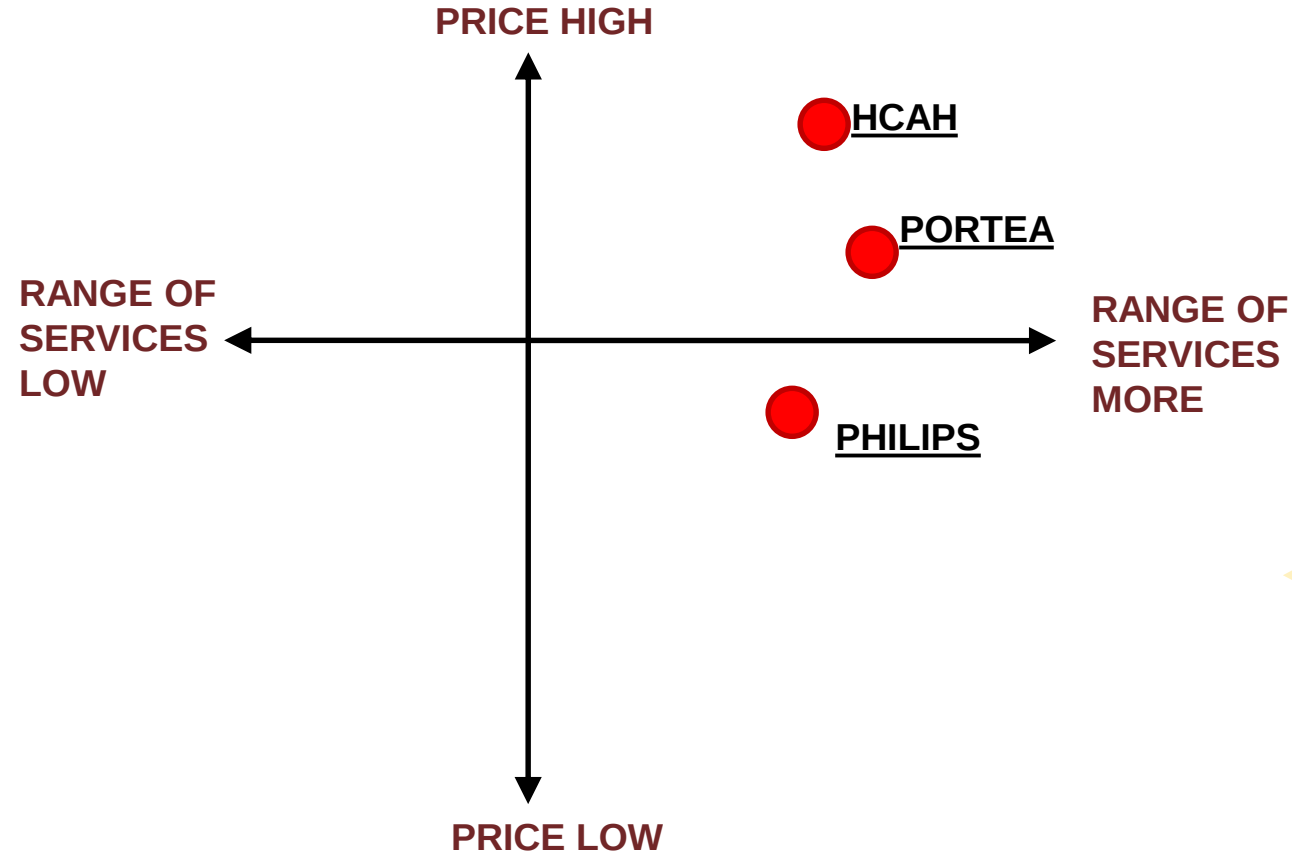
NAME	SEGMENT 1 PRICE	SEGMENT 2 GEOGRAPHICAL AREA	SEGMENT 3 RANGE O SERVICES
Healthcare at home	High	Delhi-NCR, Jaipur, Kolkata, Pune, Lucknow, Banglore, Mumbai, Chennai, Ludhiana, Hyderabad	Nurses, nursing attendant, physiotherapist, ICU set up, post operative care, post surgical care, cancer care, dialysis, medicine delivery, lab sample collection, medical equipments, critinext, elderly care.
Zoctr	High and medium	Metro cities, Pune and Ahmadabad	Nurse, nursing attendant, doctor, physiotherapist, video consultation, medical equipment, second opinion.
Vatsalaya	High and medium	Banglore	Dental services
Care24	High and medium	Mumbai and Delhi	Nurse, nursing attendant, doctor and physiotherapists, elderly care, medical equipment, diagnostic test, medicine delivery.

Zozz	Medium	Hyderabad	Nurse, nursing attendant, medical equipments
Life circle	Medium	Delhi-ncr and Hyderabad	Nurse, nursing attendant, elderly care.
Healers at home	High and medium	Delhi-ncr and Chandigarh	Nurse, nursing attendant, physiotherapist, mother and child care, yoga, corporate yoga
Nightangles	High and medium	Banglore, Chennai, Hyderabad, pune	Nurse, dental, stroke rehab, wound care, physiotherapy, ICU care, respiratory care, medical equipments, lab collection, doctor consultation.
Tribeca care	Medium	Kolkata	Elderly care, physiotherapist, psychotherapist, nurse, ambulance service, medical equipments.
Portea	High and medium	Ahemdabad, Amritsar, Baroda, Jaipur, Delhi-NCR, Chandigarh, Chennai, Cochin, Hyderabad, Indore, Kolkata, Luckhnow, Ludhiana, Mumbai, Nagpur, Pune, Vijaywada.	Nurse, nursing attendant, physiotherapists, doctor, medical equipments, lab tests, wellbeing clubs, health stands.

Philips	High	Delhi-NCR	Nurse, nursing attendant, doctor, physiotherapists, palliative care, ICU services, cancer care, respiratory care, heamo-dialysis
India home healthcare	High and Medium	Banglore, Chennai, Mumbai, Thiruvanthpuram	Nurse, nursing attendant, doctor, critical care, post surgical care, orthopedic care, neuro care, cancer care, elderly care, palliative care.
Max at home	High	Delhi-NCR, Dehradun, Mohali, Bhatinda	Nurse, nursing attendant, physiotherapist, lab sample collection, medicine delivery, doctor, X-ray(portable), dressing, injection, infusion, suctioning, tracheostomy care, PICC line care, colostomy care.
Pramati care	Medium	Delhi	Elderly care, alzemies care, autistic care, dementia care, physiotherapists.
Aakash home healthcare	Medium	Delhi	Nurse, new-born care, rehab after joint replacement, medicine delivery, physiotherapists, post operative care, post surgical care, medicine administration, portable X-ray, intravenous services.
Home medicare4u	Medium	Delhi-NCR	Doctor, physiotherapists, alzemies care, elderly care, paralysis care, stroke care, nurse, ICU services, post operative, dementia care, parkinson's, medical equipments.
My careline	Medium	Delhi	Nurse, nursing attendant, ambulance services, physiotherapists, baby care, lactation counseling, massage services, recuperation centre, pain management.
Apnacare	High and medium	Bangalore, Chennai, Hyderabad, USA	Nurse, nursing attendant, doctor, physiotherapists, critical care, lab sample collection, catheter services, medication administration, alzemies care, stroke rehab, parkinson care.

Critical care unified	Medium	Delhi	ICU services, free medical assessment, medical equipment, medical professionals.
Friska	Medium	Andhra pradesh	Nurse, nursing attendant, doctor, elderly care, lab sample collection
Medfind	Medium	Delhi-NCR	Elderly care, baby care, physiotherapists, ICU services, post surgical
Relax India	Medium	Kolkata	Elderly care, physiotherapists and medical equipments.
Apollo homecare	High	Hyderabad, Chennai, Delhi, Kolkata, Bangalore	Nurse, nursing attendant, doctor, physiotherapists, vaccination, rehab, medical equipments, lab sample collection, elderly care

CONCLUSION (Positioning Graph)



Recommendation

Homecare companies can add various other services for rising concerns like Alzheimer, Parkinson's, Autism, Maternal and child care.

Homecare industry at its start in current scenario, should work on accreditation standards for respective companies, to ensure a standard delivery of services and quality being delivered at home to patient. For eg JCI accreditation standards and protocols.

Homecare industry should have homecare service competency standards and certificate courses to ensure competent professionals at home.

Integration of technology to such homecare model would enhance the delivery of services to remote areas and also allow clinical e-monitoring of patients.



Advantages Of Healthcare Services At Home

- ▶ **Low risk of hospital acquired infection.**
- ▶ **Low ALOS in hospital.**
- ▶ **Patient : Nurse ratio getting to 1:1**
- ▶ **Better critical, focused, personalized care.**
- ▶ **Better healing and recovery at home with near and dear ones around**
- ▶ **30% to 40% reduction in price in hospital.**



You treat a disease, you win, you lose. You treat a person, I guarantee you, you'll win, no matter what the outcome.

- Patch Adams



- 
1. Quality
 2. Clinical competence of the staff
 3. Corporate tie up
 4. Backed by Dabur that gets them quality legacy experience.

1. High Price
2. No equipments of their own
3. All staff on pay-roll
4. No provision to serve remote patients

SWOT

1. Initiate Alzheimer care, Parkinson care, autistic care, maternal-child care
2. Initiate homecare-accreditation
3. Initiate competency certification for healthcare professionals at home

1. Established brands entering the market.
 2. Competitive prices set by competitors.
 3. Homecare model being explored by corporate hospitals who are well versed with healthcare delivery.
- 

Thanks!

