
PATIENT EXPERIENCE IN INDIA



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Introduction

In January 30 2020, India recorded its first case for Corona Virus popularly known as Covid19. Since then India has seen a series of lockdowns and as we inch towards somewhat of a partial recovery, the question around the state of our healthcare system has become centre stage again.

Since the 1940's where the Bhole committee gave its recommendations for developing the healthcare structure in India, as a nation we have been playing catch up with demand far exceeding the supply in terms of doctors, diagnostic equipment, hospital beds and medicines.

In addition the wellness programs have been struggling and preventive measures have not been very successful. In this context the corner stone of the healthcare system in India has become the hospital.

What determines a successful healthcare intervention is patient experience. Today with the advent of telehealth and the guidelines given by Medical Council of India, it becomes even more important for hospitals to focus on patient experience and add to the growth of the industry.

What is Patient Experience?

Private hospitals have long tracked patient satisfaction ratings, but they didn't always carry great significance. While all hospitals want happy patients, most hospitals have been historically plagued with the "doctor knows best" mentality — a mentality where clinical outcomes outweigh "touchy-feely" indicators such as patient satisfaction or overall patient experience.

However, in recent years, some leading institutions in India have begun to focus more heavily on providing an outstanding patient experience. Drivers for this include growing consumerism and transparency for healthcare services and increased interest from both consumers and providers in patient-centred care.

Why Patient Experience is important to Hospitals?

Healthcare consumers increasingly view their experience with a provider as a key consideration for determining if they'll return to or recommend the provider, largely because it remains one of the few ways consumers can differentiate providers. Over the past few decades, clinical outcomes have improved dramatically, and patients no longer view favourable outcomes as a key differentiator as these are expected. What remains is the patient's overall experience, which encompasses everything from customer service to patient-centeredness and care coordination among providers. Also given the growth of Tele Health, it would become even more important for hospitals to focus on patient experience in order to create a favourable experience and create the hook that would bring patients and others in the community back to the hospital.

Key Parameters of Patient Experience in a Hospital

While there are many parameters that determine patient experience, we have tried to list down a few key ones that might influence the satisfaction index more than the others.

1. Patient Appointment Experience
2. Patient Online Portal
3. Social Media and Digital Out Reach
4. Facility for the In-Patient Service and Emergency Service
5. Patient's Access to medical Records
6. Patient Information
7. Clinical Outcomes
8. Value Added Service

While many of these parameters are difficult to understand or assess, as part of this report we have identified Social Media as a parameter that we would like to evaluate. In order to do so, we have identified 6 Hospitals across India. These hospitals are

- 1) AIIMS
- 2) Apollo Hospitals
- 3) Fortis
- 4) Manipal Health
- 5) Narayana Health
- 6) Kokilaben Dhirubhai Ambani Hospital

We have tried to mix it up between hospitals from the government sector and private sector and also among general hospitals and super speciality hospitals. Below is our analysis of the key parameters between the social media presence of these major hospitals.

I believe that Social media is an indicative parameter. It shows whether there is a foundational maturity in the digital program of the hospital. Also a lot of patient experience is visible by the comments, and interactions with the hospital's social media channels.



Social Media Analysis for Major Hospitals in India as a part of Patient Experience:

We analysed the social media footprint of the selected hospitals and the analysis did through up some interesting results.

Facebook

Undoubtedly the first social media site we benchmarked was Facebook. Not only is Facebook very popular but also today a wide range of users use Facebook. Here are the findings below

Facebook	AIIMS, New Delhi	Apollo Hospital	Fortis Healthcare	Manipal Hospital	Narayana Health	Kokilaben Dhirubhai Ambani Hospital
Followers	13508,	2,352,403,	1,222,971,	502,358,	4,349,527,	1,140,911,
Likes	12307	2,349,072	1,082,843	500,236	4,291,965	1,138,781
Customer Ratings	4.3	4.1	2.3	NA	4.2	4.1

(Source: Facebook Data as of April 2020)

The data clearly shows that the private sector hospitals have taken social media very seriously. With the exception of Manipal, most hospitals have been very active on Facebook and the engagement seems to have given them a high rating as well. While AIIMA has a very low engagement the rating seems to be high. Fortis also seems to be an aberration which has high engagement but a very low rating. All of these hospitals have pages on Facebook, which again goes on to demonstrate the power of social platforms.

You Tube

We were particularly interested in You Tube as it is one channel that has been extensively used to gather medical information. Today videos form an important segment for users to learn about various disease conditions. Experts feel that the amount of misleading information available online can only be met with valuable and correct information being put out by these hospitals. As per the data collected by us, the Apollo Hospital and Manipal have the most number of subscribers on You Tube. Though Narayana Health has the maximum number of videos uploaded but the

<u>You Tube</u>	<u>AIIMS, New Delhi</u>	<u>Apollo Hospital</u>	<u>Fortis Healthcare</u>	<u>Manipal Hospitals</u>	<u>Narayana Health</u>	<u>Kokilaben Dhirubhai Ambani Hospitals</u>
Total Subscriber	15.5K	105K	78.1K	184K	85.8K	16.7K
Total Video Uploaded	370	927	971	1149	1904	149

(Source You Tube: Data as of April 2020)

Digital aspects of patient Experience:

Following are the key digital parameters for patient experience at major Indian Hospitals:

1. Video consultation with consultants- Telemedicine
2. Online Appointment System
3. Mobile Application
4. Internal Navigation
5. Online digital Payment method
6. Health Library with A-Z medical information
7. Digital Helpline- Online 24*7 Expert Opinion
8. Virtual tour of the Hospital

Why Digital Patient Experience should be consistent with its physical counterpart at Hospitals in India?

Accessibility and affordability along with quality healthcare are the main issues when it comes to medical treatment in Indian hospitals. When a patient visits a hospital he/she expects all the services wanted at very ease but unfortunately they need to faces a lot of issues of medical negligence, casual approach at various department starting from the registration to OPD check up to billing to curb these problem hospitals are currently emphasizing on digitalization for the better patient experience. One of the major revolutionary step towards it providing telehealth or telemedicine services. This can not only save the cost of the treatment but also can give the patients a comfortable homely atmosphere at healthcare setting. But there should be a striking balance between both physical and digital experience at the hospital. In a country like India, many people are still sceptical about adopting technology properly, for them it still what they experience after reaching the hospital. So hospitals should implement digital services like implementing telemedicine, Electronic Health Record, Mobile Health etc. but they should also keep in mind the poor digital and IT literacy, low internet penetration, lack of regionally relevant content etc. So, improving of physical experience should also not be denied but both should be in well accord with each other for providing better healthcare to the patients.

What is Patient Journey Mapping at Hospital?

Patient journey mapping is an exercise that healthcare marketers at hospitals can use to better understand what individuals experience throughout the entire patient journey. The patient journey map, which outlines all of the patient touch points during each stage of the care journey, aids in creating strategic outreach that improves both patient engagement and satisfaction.

The patient journey typically consists of six stages:

- Awareness of the condition: The patient self-assesses their conditions and symptoms, conducts research, and reaches out to online communities (posing questions on social media, etc.)
- Identify the right provider or specialist: The patient makes initial contact with a health system. This can be done via call centre, email, mobile, etc.
- Diagnosis: The patient is assessed at medical facility (physician's office, hospital, etc.)

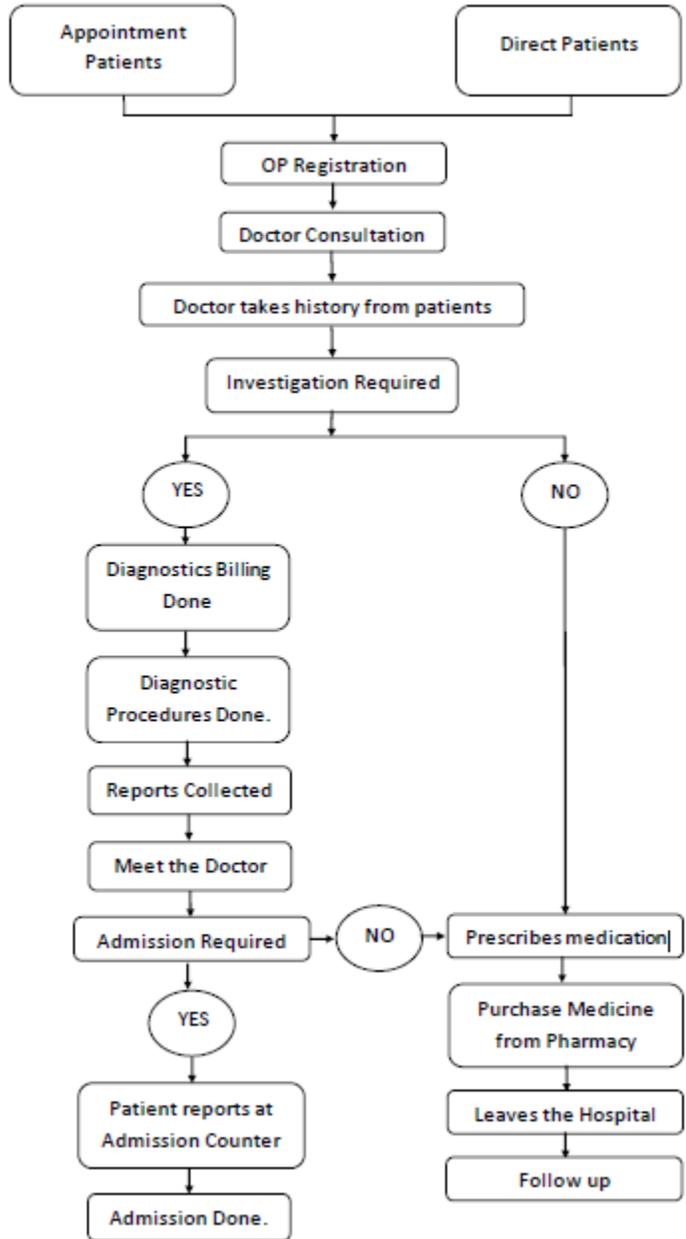
- Treatment: The health system gives the patient on-site and follow-up care (medications, physical therapy, etc.)
- Behavioral/Lifestyle Change: The patient makes changes to their routines to reduce readmissions and promote proactive health
- Ongoing Care/Post-Operative Care: The patient manages their care between clinical visits. The health system fosters engagement between the patient & physicians to enable the patient to better manage his/her own care.

Using patient journey maps as guides, marketing managers of hospitals can craft strategic, personalized outreach that keeps patients engaged throughout the care journey, as well as implement programs that fill potential gaps in the care experience. Ultimately, patient journey maps help healthcare marketers improve patient engagement and foster lasting patient-provider relationships.

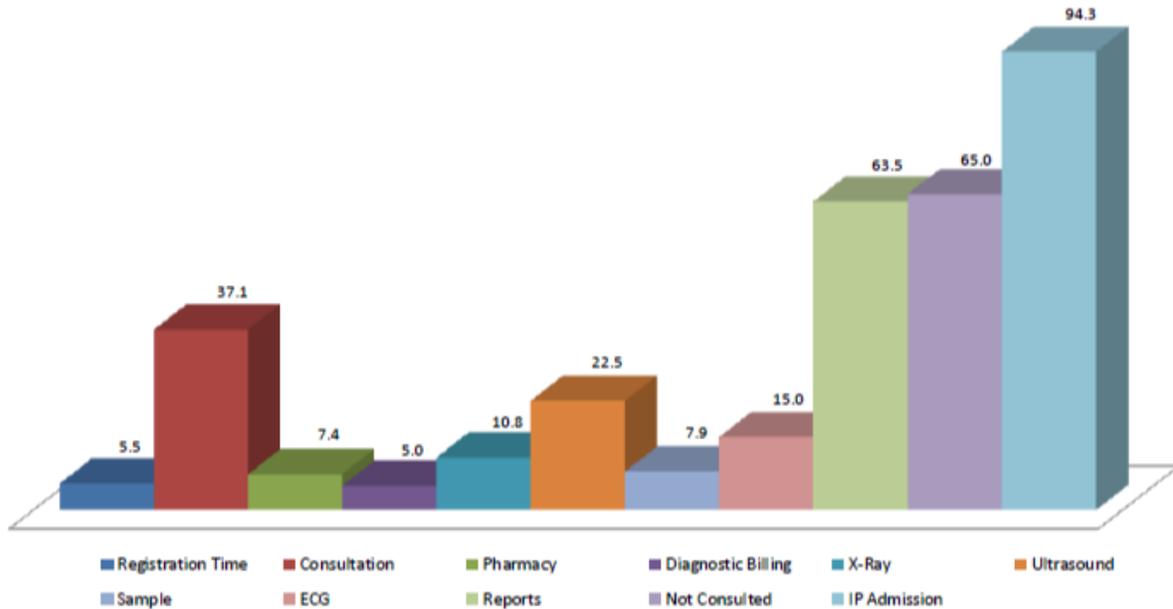


Ideal Patient flow at OPD department at a Hospital:

Based on our understanding of the system and best practices in the industry, below is the ideal OPD patient flow for both walkins and the OPD Patients.



Average Waiting time for various department at a hospital:



Example of patient journey at a hospital

Below is the summary of the experience when we tried to understand patient journey flow at a hospital in Kolkata. This is the first person account of one of the analysts who visited the hospital

Registration desk:

The subject went to the hospital at 31st December 2018 at 11.30 A.M morning.

11.30 A.M: At the ground floor there is a reception area. When the subject entered there no reception person were sitting there but only a hospital staff were present. The subject asked him that he want to take an appointment with a general physician for a normal treatment. The hospital staff told him to go the first floor at Out Patient Department, the registration desk is situated over there. The subject would have to go there and do the registration for the consultation. It took him 5 minutes there to enquire about the further process.

11.35 A.M: The subject went to the OPD section where he asked a staff about the registration desk. The hospital staff directed him towards the registration desk. When the subject went there he found that there was a long queue in front of the there. He lined up behind the queue. It took him 25 minutes to reach to the registration desk.

12.00 P.M: The subject went in front of the registration desk where he saw that there were 4 people sitting in the desk. There were two computers the desk. He asked the first person at the counter that he

wanted to take an appointment of a doctor for consultation because he had cold. The person at the counter asked the subject whether I want to take an appointment of a consultant or the RMO (Regional Medical Officer). Because at that moment no consultant was available the OPD. A few doctors were busy in Operation Theatre. And others were not present at that time. But RMO is available at 24*7 at the hospital. The subject asked how much time it will take to get an appointment of a consultant, then she called a concerned person responsible for the doctor's schedule. She told him that it will take minimum 1.5 hours the specialist physician to come. As the subject wanted the physical aspect of the ease of registration, he did not take the online appointment. As 1.5 hours are pretty long to wait and still there is no proper assurance that the consultant will come on time or not, he thought of taking an appointment with the RMO. This conversation went on for almost 8 minutes.

12.08 P.M: The subject decided to take an appointment with RMO. The lady at the registration desk took all his demographic details (Name, Age, Address, Phone Number) and then asked him to pay Rs.250 (Rs.200 consultation fees and Rs.50 as one-time registration fee for a year). The subject paid the fee at the counter. He was told to wait outside. In the mean time they called RMO for the consultation.

12.15 P.M: A person from registration desk asked the subject to get inside because the RMO had arrived then. The subject started my conversation with him. He stated my problems to him, he checked the subject's blood pressure, asked my problem more deeply. The doctor prescribed some tests and medicines. The subject went out from the hospital and bough the medicine and came back to home.

Conclusion:

India's leadership role in ushering a global digital health revolution received a boost May 29,2018 when its resolution was passed unanimously by the Global Health Assembly, the highest decision-making body of the World Health Organisation (WHO). This resolution will also help nations to transform their health systems. In February, India forged the Global Digital Health Partnership in Canberra, Australia, with 12 other countries to create digital solutions for prevailing healthcare problems. It is also planning to host a Global Digital Health Summit. No country needs digital advancements more than India, where the healthcare system still faces grave inadequacies.

Parameter / 1000 people	India	WHO
Doctors	.65	1
Nurses	1.3	2.5
Hospital Beds	1.3	3.5

A fast-growing digitally literate population, 20-30% annual growth of smartphone and internet penetration, 58% annual growth in rural internet users, all provide enough fuel for the digital movement to spread across India. The completion of Bharat Net, which will connect 2.5 lakh gram panchayats, will provide a solid backbone for access to the remotest of areas. Telemedicine is a key component that will help bring down the disparity in health offerings between rural and urban India. Urban India can also benefit hugely through extended diagnosis and treatment to patient's homes.

So, from the above study we can conclude that India has a tremendous potential for giving world-class medical treatment with both improved physical and digital experience within few years if important measures can be taken properly.

About Healthcare India

Healthcare India is a research and analysis firm that looks at emerging technology trends in India and its impact on the healthcare ecosystem. We analyse and understand emerging technologies and understand how it can be used to create a new model for care in the country. We publish reports, talk to healthcare leaders and participate in events across the country.

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Most of the data used in the report is based on secondary research for which sources are mentioned. A lot of the other information like journey maps are collected from individual interactions.

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