

Home healthcare in India – Need and future prospects

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ABSTRACT

Health care sector in India, has been transforming significantly since the past decade. Its aim has been shifting from mere profit earning to delivery of care with patient satisfaction and delivery of accessible, affordable and patient centered care, the ultimate motive. Care of patients include core services as well as after care support services. These supportive services include care provided at home to assist the patient in their daily chores. Home healthcare is an emerging trend in healthcare sector and projects the need of the patients commencing from in home medical care to non-medical assistance. Home care may also be referred to as domiciliary care, social care or in home care. Care may be provided by licensed healthcare professionals who provide medical treatment needs or by professional givers who provide daily assistance to ensure the activities of daily living.

Home healthcare services have been the need of the hour owing to the sedentary lifestyle, changing dietary patterns, rising obesity levels of people as a result of their job needs and rise in geriatric population in India. These factors have steadily emerged in the form of lifestyle centered diseases such as diabetes, hypertension, obesity etc. These non-communicable diseases have hampered the normal daily chores of the people rendering them unable to live a normal life and a need to be assisted in daily routine activities under medical supervision has arisen. Also, poor patient – bed ratio in Indian hospitals and the need for care for adults, seniors and pediatric clients recovering after a hospital or facility stay, require additional support to remain safely at home and avoid unnecessary hospitalization. Certified services, including short term nursing, rehabilitative, therapeutic and assistive home healthcare act as panacea for the issues arising thereof.

Home healthcare is a wide range of services that can be given at home, for an illness or injury. It is usually less expensive, more convenient and just as effective as care delivered in a hospital or skilled nursing facility (SNF).

This paper elaborates the need of home healthcare in Indian healthcare sector and its future prospects by identifying the factors that play pivotal role in making it the need of the hour.

Key words: Home healthcare, short term nursing, rehabilitative care, therapeutic care, assistive home healthcare.

INTRODUCTION

Technological advancements have influenced our lives in unprecedented ways. Conventional means of availing services have evolved to more quick and advanced manners of care. A newer addition to this 'on-demand' and 'at convenience' profile of services, is healthcare coming home – popularly known as 'In-home Healthcare Market'. In-home health is about bringing essential patient care and health services to people at the convenience of their home.

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 personnel. For terminally ill patients, home care may include hospice care. For patients recovering from surgery or illness, home care may include rehabilitative therapies.

It is important to understand the difference between home health care and home care services. Although home health care may include some home care services, it is medical in nature. Home care services include chores and housecleaning, whereas home health care usually involves helping someone to recover from an illness or injury. Home health care professionals are often

licensed practical nurses, therapists, or home health aides. Most of them work for home health agencies, hospitals, or public health departments licensed by the state.

Home health services help adults, seniors, and pediatric clients who are recovering after a hospital or facility stay, or need additional support to remain safely at home and avoid unnecessary hospitalization. These services may include short-term nursing, rehabilitative, therapeutic, and assistive home health care. This care is provided by registered nurses, licensed practical nurses, physical therapists, occupational therapists, speech language pathologists, home health aides and medical social workers as a limited number of up to one hour visits.

The largest segment of home care consists of licensed and unlicensed non-medical personnel, including caregivers who assist the individual. Care assistants may help the individual with daily tasks such as bathing, eating, cleaning the home and preparing meals. Caregivers work to support the needs of individuals who require such assistance. These services help the client to stay at home versus living in a facility.

Individuals typically desire to remain independent and use home care services to maintain their existing lifestyle. Government and Insurance providers are beginning to fund this level of care as an alternative to facility care. In-Home Care is often a lower cost solution to long-term care facilities.

These services may include some combination of professional health care services and life assistance services. Professional home health services may include medical or psychological assessment, wound care, medication teaching, pain management, disease education and management, physical therapy, speech therapy, or occupational therapy. Home care services include help with daily tasks such as meal preparation, medication reminders, laundry, light housekeeping, errands, shopping, transportation, and companionship. Home care is often an integral component of the post-hospitalization recovery process, especially during the initial weeks after discharge when the patient still requires some level of regular physical assistance.

■ **Activities of daily living** (ADL) refers to activities, including bathing, dressing, transferring, using the toilet, eating, and walking, that reflect the patient's capacity for self-care.

- **Instrumental activities of daily living (IADL)** refers to daily tasks, including light housework, preparing meals, taking medications, shopping for groceries or clothes, using the telephone, and managing money, that enables the patient to live independently in the community.

Components of home health care:

- Structure and process of care;
- Physical aspects of care;
- Psychological and psychiatric needs;
- Social aspects of care;
- Religious, spiritual, and cultural aspects of care;
- Care for the imminently dying; and
- Ethical and legal aspects of care.

Hospice:Care designed to give support to people in the final phase of a terminal illness that focuses on comfort and quality of life, rather than a cure. The goal of hospice care is to enable patients to be comfortable and free of pain to help them live each day as fully as possible. It is a method of care that can be included in the home care realm, but is also available as inpatient service. Hospice is a cluster of comprehensive services for the terminally ill with a medically determined life expectancy of 6 months or less. Whether hospice services are performed at home or in a medical facility, the emphasis of care remain the same; pain and symptom management, which is referred to as palliation.

OBJECTIVES

- 1) To explore the factors that have stimulated the need of home health care in Indian Healthcare sector.
- 2) To identify the future prospects of home healthcare.

METHODOLGY

This is a descriptive study based on secondary data collected from the data bases of GOOGLE Internet search engine, EBSCOdata base and review of IBEF reports on Indian healthcare sector.

DISCUSSION & FINDINGS

A. The Need:

In-home healthcare is about bringing essential patient care & health services to people at the convenience of their home. Some of the biggest benefactors of this service are aging adults in need of regular medical care, patients recovering from hospitalization & pediatric patients. Apart from the benefit to patients in terms of convenience and cost savings, the service also helps in de-congesting hospitals for more critical care needs.

This concept is popular in the developed nations such as US and also developing countries akin to India such as China and the reasons are obvious. India's geriatric population (aged over 60+) currently over 100+ million is expected to grow to approx. 325 million by 2050. The burden of chronic diseases has been increasing steadily amidst aging population, sedentary lifestyles, diet changes, and rising obesity levels. It is estimated that lifestyle diseases will account for a whopping 74% of total deaths by 2030 (compared with 56% in 2008) with Cardiovascular, Cancer and Diabetes accounting for a majority. With increasing urbanization and increasing women participation in workforce, people are hard pressed to give the necessary time and attention to their aging parents. Home-based healthcare is an initiative to reach to such households beyond the boundaries of traditional hospital infrastructure.

Apart from the benefits to patients in terms of convenience and cost savings, home health care also aids in making the hospitals focus on more critical care needs.

The global market for in-home healthcare is projected to grow at a rate of 7.7% annually and it estimated to be valued at 306 billion USD by 2018. Still in a nascent stage, the Indian in-home healthcare market is currently valued at 1.5 billion USD and is projected to have a staggered growth of 20% over the next two years and a 40% growth rate between 2016 & 2018.

Key Benefits to Consumers:

- Convenience
- Lower chances of infection
- Significant cost savings
- Savings in terms of time and effort – especially for doctor visits and purchase of medicines
- Preventive care

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

To maximize their reach, in-house healthcare service providers are also partnering with leading hospitals and healthcare chains such as Fortis, Manipal Hospitals, Columbia Asia, Sparsh among others.

Value Proposition:

The homecare business comes as a boon for the already burdened healthcare infrastructure in India. There is significant demand-supply gap plaguing the Indian healthcare system - while India accounts for 20% of the global disease burden, it accounts for only 6% of global hospital beds and 8% share of doctors and nursing staff. Home healthcare concept complements the healthcare delivery by reducing the average length of stay, ensuring efficient utilization of existing bed capacity and reducing chances of re-admission. They can also improve the average revenue per occupied bed if they work out the synergy in the right manner with the homecare providers.

The patients and their families are also increasingly adopting healthcare services at home. It provides the comfort of home and saves the physical and psychological pressure of hospital visits and stays. Home healthcare service is also more affordable than hospital stays. With savings on real estate and infrastructure cost, the model operates at ~15-30% lower cost when compared to hospital expenses for similar treatment.

With life expectancy increasing significantly in India, home health care is becoming mandatory. The concept of old-age homes or assisted living is socially largely unacceptable in India and therefore there is huge demand for home-based health care facilities. It is also finding great favor with expatriates who have parents at home in India and are looking for professional healthcare for them at the convenience of home.

Key Challenges and Success Factors:

Being an evolving model, the industry has its own challenges to deal with. Home healthcare is a very people intensive and execution-oriented business. Some of the current challenges include employee retention, employee utilization, operational issues such as inconsistency in quality and lack of standard protocols for in-home healthcare training. Successful models would need strong management, medical oversight, and high-quality nurses supported by a quality controlled pharmacy.

The role of technology is critical as it facilitates strong execution be it scheduling of appointments and other logistics. Also, companies are exploring options such as changing employee mix, building a “network panel” of doctors/nurses to cater to excess demand to reduce operating costs. The margins in the home healthcare business are lower so companies need scale for the operations to be viable.

Currently most players have collaborations with leading hospitals to generate referrals – however with hospitals also entering the business, a shift from the current business models is expected. Players are increasingly adopting marketing activities, both residential awareness programs and digital marketing to increase awareness and expand reach. Some experts believe that business models that coexist with the current health care systems and networks in India will be the key to success in this market.

The home healthcare market in India is all set to disrupt the conventional medical service space in the near future. Organized players will bring in credibility, standards and accountability, which have been lacking in this area in India. This would also encourage insurance companies to cover home healthcare giving a further boost to this sector. Home healthcare is playing a critical role in expanding the spectrum of healthcare services in India providing the much-needed

professional care, convenience and cost benefits to a sizeable population in India that needs and is willing to pay for these services.

- * *Data has been taken from the Journal of Asian Hospital & Health Care Management – 2016.*

B. Future Prospects:

Healthcare services in India is still an unexploited market and the Home Healthcare market currently at a nascent state, is all set to disrupt the conventional medical service space in India. Given the backing from big funding houses, the significant need gap and access to new age technology, players are taking big strides to expand their market and services to create value.

Market Potential:

Players in the industry provide a range of services including general primary healthcare, post-hospitalization care, chronic disease management, elderly care, and allied services at home. The global market for in-home healthcare (services, devices, products) is expected to reach USD 355 billion by 2020. North America is the largest market (accounting for ~40% share) while Asia Pacific is the fastest growing.

Asian home healthcare market is expected to grow at a CAGR of 9.7% from 2014 to 2020 owing to high unmet medical needs coupled with rapidly improving healthcare infrastructure in emerging markets of India and China. The Indian market is at a nascent stage but with significant potential. The Indian market is currently estimated at over USD 3 billion p.a. and growing at 20+% annually. As per industry players, the industry has huge prospects as almost 80% of the care that is currently given in the hospital can be delivered in the home setting, with the proper use of technology.

Key Players:

Companies in the home healthcare market are adopting innovating models to provide access, affordability and convenience right at the patient's doorstep. Portea Medical, the pioneer in the segment was founded by Zachary Jones and Karan Aneja in 2012 and sold to serial entrepreneur

couple Meena Ganesh and K Ganesh in 2013. The company is the leader in the segment and has raised over USD 45 million in two funding rounds led by Accel Partners.

The company operates across 24 cities in India and 4 in Malaysia with 60,000 visits a month. Approx. 60% of its customer base comprises those above 60 years of age. While it does not handle emergency care, Portea focuses on general primary healthcare, post-hospitalization care, chronic disease management and allied services. Portea is also the frontrunner in technology adoption and uses an in-house app for centralized patient records, hand held devices for field staff and GPS tracking for monitoring of logistics.

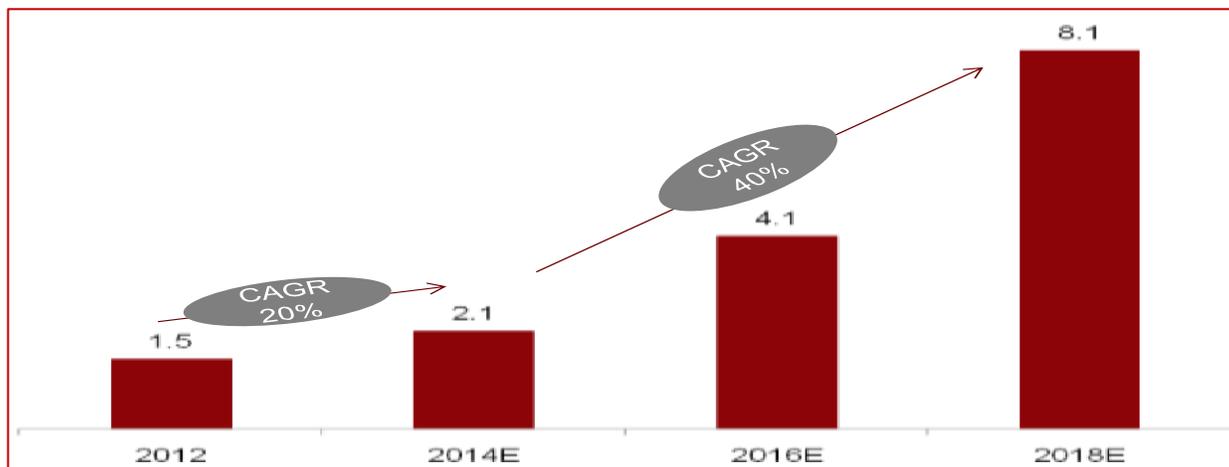
Even hospitals including Apollo and Max have forayed into the Indian home healthcare market. Apollo started the *Unique Home Care* service with over 500 homecare professionals offering services across Hyderabad, Chennai and Delhi. It has plans to add 13 more cities over the next 15 months with a total investment of Rs/- 50 crore.

The players in the industry have ambitious growth plans and intend to increase their reach to cover Tier II/Tier III cities. With players taking big strides, the industry is fast catching attention of PE investors.

In the next 4-5 years, Tier 2 cities will be the focus of expansion for almost all major players.
Source: RedSeer Analysis

Indian Home Healthcare market is expected to grow at the rate of

40% by 2018. Source: RedSeer Analysis



Service Offerings – Rapid Service Line expansion expected

With increasing life expectancy and changes in disease patterns, the possibilities for in home healthcare is also expanding. Currently the services largely include nursing care, physiotherapy, post-operative care & personalized doctor visits. Also popular are service packages for diabetic care and geriatric care. With such customized packages, in home healthcare, also leads to significant savings in both direct and indirect costs to the consumer. Experts are also exploring more application areas for in home healthcare and service expansion is expected in the areas of Oncology, Dialysis and Children’s Special Needs segments. In the coming months, renting of medical equipment during periods of non-usage is expected, so as to improve asset utilization and aid revenue enhancement for the players.

The most commonly availed service offerings currently are nursing and caretaker visits. Some of the services for this segment involve post-surgical care, oxygen administration, suture removal and IV infusion.

Annual care packages are also fast gaining popularity; fast growing in this service segment are diabetic care and senior care services. The annual package includes regular visits from a nurse and also visits from doctors, a set number of times per week. These care packages are highly customized and prices vary from case to case.

CONCLUSION

The home healthcare market in India is all set to disrupt the conventional medical service space in the near future. Venture capitalists and investment firms have identified the market as being viable for investment, given the current healthcare demographics, socio-economic shifts and the significant need gap. This key contribution from investment firms, is helping players build scale and achieve sustainability.

Technology will enable players in building competitive advantage. Portea for instance is supported by a mobile app on the back end to improve efficiency and accuracy. Wearable technology with varied applications areas such as patient medical vitals monitoring are areas which are currently being explored. Operational efficiency and bottom line expansion will be driven by technology adoption and effective capacity utilization.

The business model that is followed by most players today is to have collaborations with leading hospitals to generate referrals; a major portion of today's in-home healthcare consumers come from referrals of doctors and hospital chains. In the next 4-5 years, as the major players gain critical mass, their bargaining power with hospitals is set to increase significantly.

Players are also heavily spending on marketing activities, both residential awareness programs and digital marketing (social media page, blog setup, search engine optimization and mobile app development) to increase awareness and expand reach.

Key developments are expected in areas of insurance, regulations and service protocols.

Market operators are working towards including home health service to be part of health insurance. Strong focus is also given towards developing standard service protocols to ensure consistency in quality, which will lead to build service credibility.

Organizations will use this channel as a pipe to push all healthcare products and services. The home healthcare market might not currently hold a big share of revenue, but this share is set to expand through the inclusion of multiple medical services from pharmacy needs, medical devices, hospital appointments, patient records, chronic disease management and other medical services.

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