

## FICCI and Kantar IMRB launch Healthcare Consumer Report 2017

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**This report contains a study that measures experiences and expectations in the patient's journey with the healthcare provider**



FICCI and Kantar IMRB have released The 2017 Healthcare Consumer Report, which is a collaborative effort to understand the patients' experiences and expectations from healthcare providers (hospitals).

The report provides a complete read of the opportunities and gaps in experience and services offered by the healthcare providers from patients' perspective in India.

The Report was released at FICCI's annual healthcare conference, FICCI HEAL 2017, titled 'Indian Healthcare: A Patient's View' held at FICCI Federation House, New Delhi.

FICCI HEAL 2017 focuses on various issues of the Indian healthcare ecosystem such as bringing about policy change, strategizing and effective implementation of government policies, the need for interoperability and transparency in the industry, and the need to scale-up the services provided.

Speaking on the occasion, Mr Varun Khanna, Co-Chair-FICCI Health Services Committee and Managing Director, BD India said, "Given the transformation, this industry is undergoing with respect to the improving infrastructure and technological advancements, we have to be careful that the hospitals and the doctors continue to give emphasis to core essentials like empathy, care and trust. The survey reveals very clearly the role of these elements in impacting the healthcare consumers loyalty."

Talking about the study, Praveen Nijhara, Senior Executive Director, Kantar IMRB and Head, Stakeholder Management Division said, "The healthcare consumer is a multi-dimensional and a holistic consumer with exposure to multiple categories, with his expectations being shaped not only by his own past experiences but also by technology influenced categories like e-commerce, hospitality, retail etc. We believe that directions offered by this report will help hospitals craft a positive and a seamless patient experience in order to improve healthcare consumers' loyalty."

Ashok Kakkar, Co-Chair-FICCI Health Services Committee; Sr. MD Varian Medical Systems International India Pvt Ltd said, "Getting to know the view of today's patients is an important source of information, in order to build businesses in this sector."

The healthcare consumer is no longer a passive consumer. The healthcare providers cannot be complacent anymore in this growing competitive market place. Hence, knowing both - what is important to the patients and where are the gaps in experience, will help prioritize actions for maximum benefit to the business."

Dr Narottam Puri, FICCI's Health Services Advisor and Former Chairman – NABH said, "It is heartening to see that the healthcare consumers are appreciative of some of the improvements that have happened in the healthcare industry especially related to medical technology, and increase in healthcare providers etc. It is important for us to stay abreast of the changes in expectations that are happening, to ensure minimal gap between what the patient needs and what they get".

The Healthcare Consumer 2017 study included feedback from over 5000 patients. Patients from more than 150 multispecialty private and government hospitals across 6 leading metros of the country - Mumbai, Chennai, Delhi-NCR, Hyderabad, Bengaluru and Kolkata, were interviewed. The sample is well represented across patients seeking different treatments, socio-economic profile and demographics.

Shobha Mishra Ghosh, Assistant Secretary General, FICCI, said, "The healthcare sector needs to ensure that in future the healthcare delivery model is patient-centric. For this to happen, the organization has to keep the patient's needs and expectations in mind, while making decisions, investments, designing training and implementing processes. The report is intended to provide access to the patient's view, which could be valuable insights for the healthcare providers in improving the patient's experience."

**Some of the key Highlights of this report:**

- 57% of the patients were found to be happy with their overall experience at the hospital. Experience at private hospitals better than Government Hospitals.
- The cities of Mumbai, Chennai and Delhi take the lead on delivering Patient satisfaction, over Hyderabad, Bengaluru and Kolkata
- Patients found to place high value on aspects such as a hospital's reputation and service elements as well apart from treatment. Service is no doubt on its way to becoming a key differentiator for hospitals. While the treatment itself continues to remain a non-negotiable expectation.
- The survey also reveals the healthcare consumer as a heterogeneous one, with differing expectations basis the demographic and the socio-economic segment he belongs to. Generation Y was seen to have lower satisfaction and stiffer expectations with respect to elements like –wait time to meet the doctor, time taken to complete the discharge process etc.