



Surgical Care in India

*An* **Insight** *on*

**Patients' Experience**







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# Executive Summary

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## Background to the Survey

In the health sector, the patients are the primary users of the services and facilities. Therefore, to make health services patient-friendly, an understanding of the requirements of patients is helpful.

Surveys that include patients as respondents provide inputs that can form the base for improvements in the health delivery services/facilities. These surveys help patients articulate their needs and expectations based on their requirements and experiences with the treatment procedures.

As requirements of surgical patients are distinct from a general patient, the Bureau of Research on Industry and Economic Fundamentals (BRIEF) Private Limited surveyed surgical patients to understand specific areas of intervention for surgical treatments. However, the survey did not intend to measure the performance of the healthcare service providers.

## Objectives

The survey objectives include:

- To identify the parameters/framework affecting patients' choices in the selection of health facilities for surgical services.
- To analyse post-surgery satisfaction levels of patients on different parameters such as hospital processes, doctors, costs, insurance claims, etc.
- To document the expectation of the patients.

## Methodology

The survey involved personal interviews with 280 patients from six cities - Delhi (NCR), Chennai, Mumbai, Bengaluru, Kolkata, and Ahmedabad. Only those patients who took surgical treatment between the years 2019 to 2022 were part of the survey.





## Survey Findings

### Demographics and Surgery Details

- **Age:** Maximum number of patients belonged to two age groups of 21-30 years and 31-40 years, with 32 % of patients in each age group.
- **Gender:** The sample of patients under the survey consisted of 69% Male and 31% Female.
- **Occupation:** 50% of the patients were private sector employees.
- **Annual Income of Family:** Maximum patients (49%) belonged to the income range of below 6 lakhs.
- **Patients Surgeries**
  - Out of 280 patients, 196 patients (72%) had elective surgery.
  - 224 patients (81 %) underwent surgery for the first time.
  - Reported Surgeries include Knee Replacement, Laparoscopic Hernia Surgery, Ear Surgery, Nasal Polypectomy, Sphincterotomy, Appendectomy, Ovarian Cyst, LASIK Surgery and Cataracts, and Cholecystectomy.
- **Selection of Healthcare Service Provider:** Patients preferred going to private hospitals more than the government hospital or trust hospitals. The selection of a Healthcare Service Provider was based on the recommendation by a consulting doctor and the qualification and experience of the treating doctors.
- **Surgery Cost, Affordability, and Insurance Coverage:** 38% of patients incurred surgery costs in the range of INR 50,000 to INR 1,00,000, followed by 29% of patients below INR 50,000. On the question related to affordability of the surgery cost, 37% of patients reported it as non-affordable. The health insurance coverage was limited to only 22% of the patients.
- **Pre-Surgery and Post-Surgery Counselling:** 37% of patients and 72% of patients reported getting pre-surgery counselling and post-surgery counselling respectively.
- **Satisfaction with Services/Facilities**

The survey captured the perception of patients on different kinds of services/facilities utilised by them during the process of surgical treatment and measured their satisfaction levels on Registration Process, Room Facilities, Staff- Skills, Behaviour and Availability, Doctors' Availability and Behaviour, Infrastructure Facilities for Surgery, and Discharge Process. The mean rating (out of 5) was calculated for all the responses received from 280 patients. The overall rating was 2.89 projecting an average level of satisfaction among patients.

### Overall Satisfaction Level with the Healthcare Services for Surgery

City	Delhi	Mumbai	Bengaluru	Chennai	Ahmedabad	Kolkata	Overall (Out of 5)
Rating based on satisfaction level with Healthcare Services	3.16	2.79	2.45	2.78	3.02	3.16	2.89



## Conclusion and Way Forward

The survey attempted to translate patient experience measured through a survey instrument into meaningful and actionable information. The findings identified areas of patient expectations and gaps that include poor assistance, lack of transparency regarding treatment costs, higher surgery costs and affordability, difficulty in identifying Healthcare Service Providers, and non-availability of advanced surgical treatment facilities in non-metro cities, and poor coverage under health insurance.

Based on the above, one can conclude that Hybrid Healthcare Model/ New Age Health Care Service Delivery Models appropriately helps provide cost-effective, timely, and accessible surgical care across India. This model can provide support and guidance to patients in different areas of surgical care, such as the discovery and selection of quality medical care providers and assistance through helplines and in-person support related to treatments, costs, and insurance.

Hybrid Healthcare Model brings a kind of synergy between digital health services and in-person treatment thereby ensuring better patient experience with the surgical treatment process. Hybrid Healthcare Models thus democratizes access to superior healthcare whilst improving the overall quality of life of the patient.



# Background and Methodology of the Survey

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Building on the quality of care necessitates understanding the experience of patients from the stage of diagnosis to the stage of treatment. This can be achieved by capturing patients' satisfaction levels based on their perception of the facilities/services utilized by them during the treatment process. Such understanding of patients helps the health care system in bringing the required changes that will be more receptive to the needs of patients and also make the facilities more patient-centric.

Within health care, surgical care is the most specialized area and is a significant part of the health system. In India itself, the demand for surgeries is projected at 5000 surgeries per year per 1,00,000 population by The Lancet Commission on Global Surgery. In a research paper on 'Estimation of the National Surgical Needs in India by Enumerating the Surgical Procedures in an Urban Community Under Universal Health Coverage', the projection is 3646 surgeries per 1,00,000 population in India. The paper indicates that the Indian population (men and women together) within age groups 30–49 years will need about a third of the total number of surgeries (33.3%) and the 50–74 age group will need another 28% of the total estimated surgeries.

To meet the requirements and needs of surgical patients, a generic patient survey may not provide insight into the intervention areas for surgical treatment processes as the requirements of surgical patients are distinct from a general patient.

There are very few studies related to the above in the field of surgical treatment in India. This survey intends to understand the views/opinions of patients related to surgical services availed over the continuum from deciding to select a particular healthcare service provider for treatment to the different treatment stages (registration to discharge process) in the hospital.

For this, the Bureau of Research on Industry and Economic Fundamentals (BRIEF) Private Limited has surveyed patients who experienced surgery after 2019.



## Objectives

The survey provides insights into the choices, experiences, and overall satisfaction of patients pertaining to their recent surgery. The survey did not intend to measure the performance of the healthcare service providers. The survey was designed with the following objectives:

- To identify the parameters/framework affecting the choices of patients in the selection of health facilities for surgical services.
- To analyse post-surgery satisfaction levels of patients on different parameters such as hospital processes, doctors, costs, insurance claims, etc.
- To document expectation of the patients.

## Methodology

A mixed-method approach was used to collect quantitative and qualitative responses from the patients.

## Survey Respondents

The respondents for the survey included 280 patients who benefitted from surgical treatment from 2019- 2022.

## Survey Distribution

For the survey, personal interviews were conducted with the patients in 6 cities as detailed below:

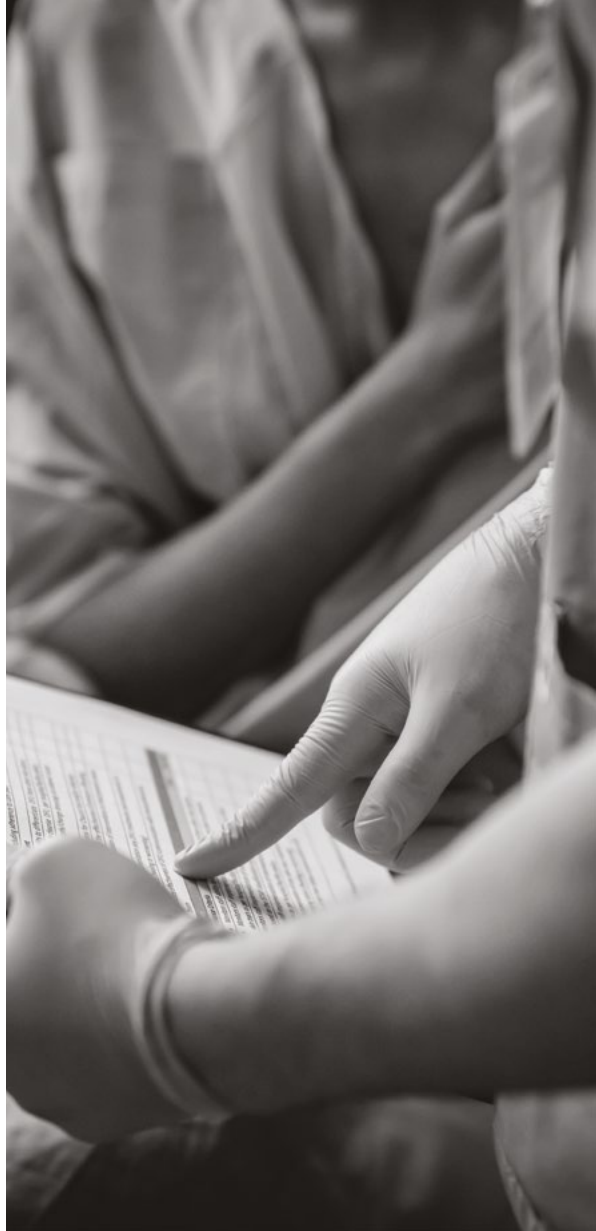
Cities	Delhi (NCR)	Chennai	Mumbai	Bengaluru	Kolkata	Ahmedabad	Total
Patients	50	50	50	50	40	40	280

## Tool for Data Collection

A questionnaire was developed with both objective and subjective questions. The interviewer discussed various aspects in detail with the patient while filling out the questionnaire to collect reasons for patients' choices and satisfaction levels.

## Timeline

The survey was conducted in June-July 2022





# Survey Findings: Demographics and Surgery Details

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## Age

The maximum number of patients in the survey belonged to the age groups of 21-30 years and 31-40 years, with 32% of patients in each age group. The lowest percentage with 1% of patients were in the age group of 20 years and below.

Figure 1: Age of Patients

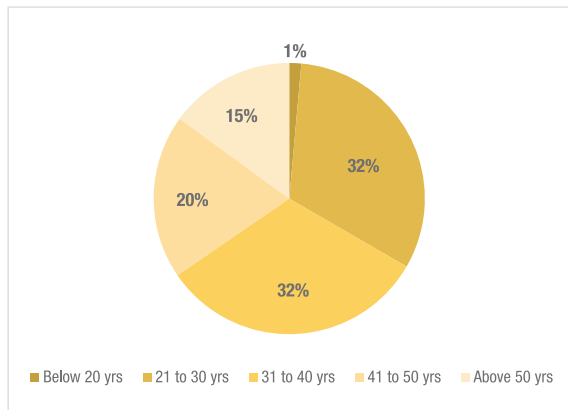
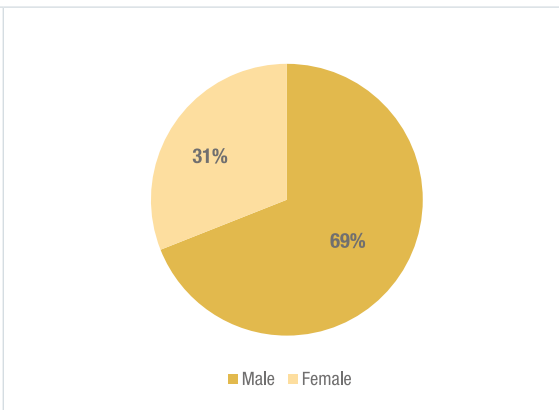


Figure 2: Gender of Patients



## Gender

The gender distribution of the patients was 69% male and 31% female.

## Occupation

Regarding the occupational background of patients, 50% were employed in private services, followed by 25% in the category of self-employed or businessman. The remaining 8% of patients were from government services.

Figure 3: Occupation of Patients

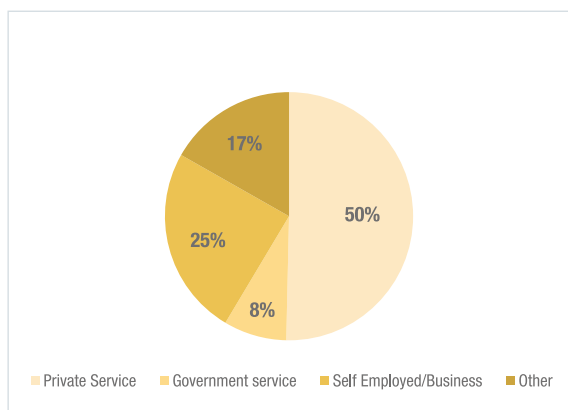
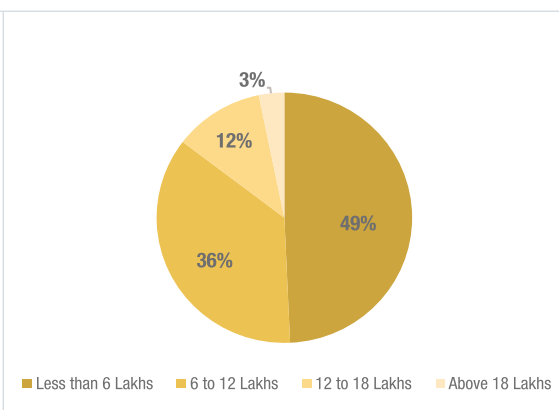


Figure 4: Annual Income of Family (INR)



## Annual Income of Family

49% of the families belonged to the income range of below 6 lakhs, followed by 36% in the range of 6-12 lakhs, 11% in the range 12 to 18 lakhs, and 3% above 18 lakhs.



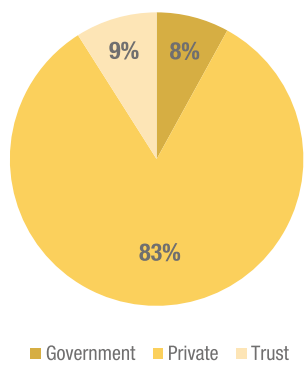
# Survey Findings: Selection of Healthcare Service Provider —



## The Healthcare Service Provider Selection

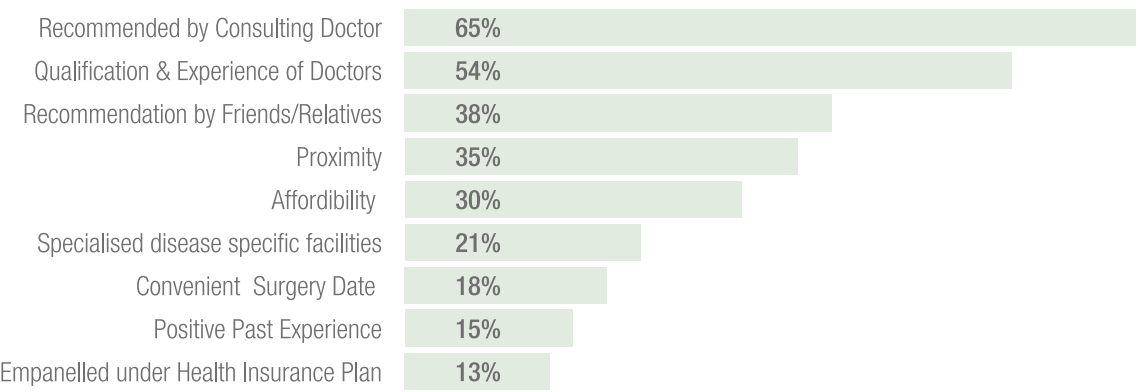
The patients’ selection of Healthcare Service Providers was more towards private hospitals (83%), followed by trust hospitals (9%) and government hospitals (8%).

Figure 5: Type of Hospital



In a multiple-choice question patients provided various reasons for selecting a particular Healthcare Service Provider. The top three reasons identified from the survey were - ‘Recommendation by Consulting Doctors’, ‘Qualification and Experience of Doctors’, and Recommendation by Friends/ Relatives.

Figure 6 :Reasons Affecting Selection of Healthcare Service Provider





**Table 1: City-Wise Response for Reasons Affecting Selection of Healthcare Service Provider**

Reasons	Ahmedabad	Bengaluru	Chennai	Delhi	Kolkata	Mumbai
<b>Recommended by Consulting Doctor</b>	63%	48%	72%	68%	80%	62%
<b>Qualification &amp; Experience of Doctors</b>	43%	56%	28%	72%	40%	78%
<b>Recommended by Friends/Relatives</b>	45%	18%	50%	42%	43%	32%
<b>Proximity</b>	28%	4%	66%	44%	8%	52%
<b>Affordability</b>	58%	2%	20%	24%	23%	12%

## Key Findings:

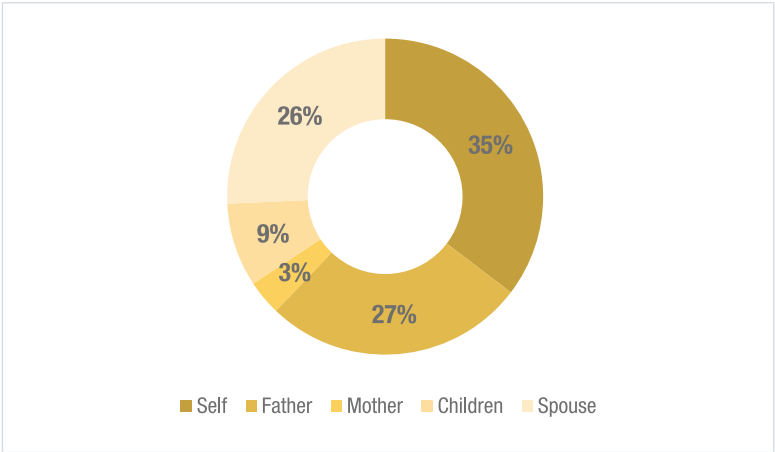
- 65% of patients accepted the recommendation by their consulting doctor for selecting a Healthcare Service Provider.
- 54% of patients gave importance to the qualification and experience of doctors.
- 38% of patients preferred to take suggestions from friends and relatives.
- 35% of patients decided on the proximity of the Healthcare Service Provider.
- 30% of patients choose Healthcare Service Providers based on their affordability for treatment.
- 13% of patients selected a particular Healthcare Service provider due to its empanelment in their health insurance plan.
- City-wise responses of patients indicate:
  - 78% of patients from Mumbai, 72% from Delhi, and 56% from Bengaluru made their decisions based on the qualification and experience of doctors associated with the healthcare service provider.
  - 80% of patients from Kolkata, 72% of patients from Chennai, and 63% of patients from Ahmedabad followed the recommendation from consulting doctor.



# Key Person in Family for Selection of Healthcare Service Provider

The survey identified the key person within the family for healthcare-related decisions.

Figure 7: Key Person in the Family



## Key Findings

35% of patients decided on their own, followed by fathers (27%) and spouses (26%)





# Survey Findings: Surgery Cost, Affordability, and Insurance Cover —



## Cost of Surgeries and Affordability

The survey indicates that affordability is among the top five reasons for patients when selecting a Healthcare Service Provider.

Figure 8: Cost of Surgery (INR)

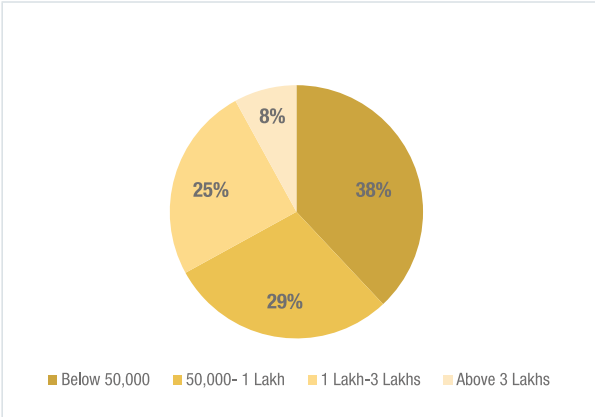
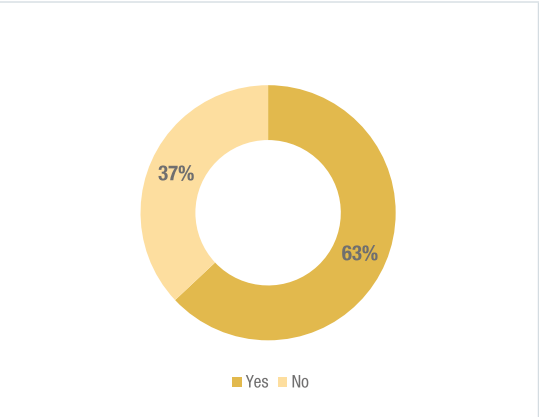


Figure 9: Cost Affordability



### Key Findings:

- 38% of surgery costs were in the range of INR 50,000 to INR 1,00,000, followed by 29% below INR 50,000, 25% between INR 1,00,000 to 3,00,000 and remaining 8% above INR 3,00,000.
- 37% of patients found the surgery cost non-affordable. The patients reported that they took monetary support from friends and relatives for the surgical treatment.



## Status of Health Insurance among Patients

As per the NITI Aayog report on ‘Health Insurance for India’s Missing Middle’, at least 30% of the population, or 40 crore individuals are devoid of any health protection through insurance. The findings of the survey also substantiate this information.

Figure 10. Type of Insurance

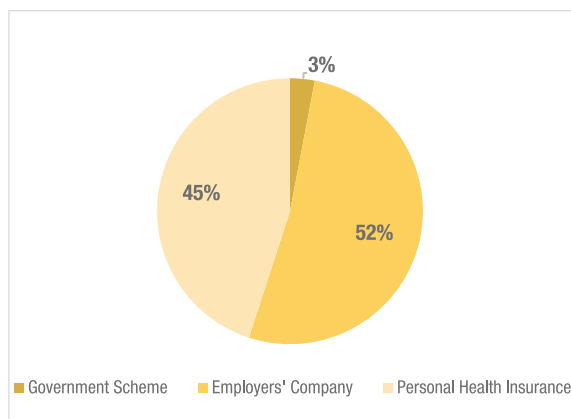
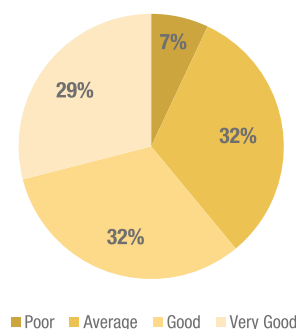


Figure 11. Satisfaction Level on Health Insurance Claim Process



## Key Findings:

- 78% of patients didn't have any health insurance.
- 22% of patients with Health Insurance Coverage included –
  - 52% of patients had insurance plans through their employers' company.
  - 45% had personal health insurance
  - 3% through government schemes.
- 78% of the treatment amount of patients who used health insurance was settled through their health insurance plan.
- 32% of patients gave a rating of average and another 32% gave a rating of good for health insurance claim process.





# Survey Findings: Pre-Surgery and Post-Surgery Counselling

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## Pre-Surgery and Post-Surgery Counselling

The information provided before and after surgery related to surgical treatment was one of the important components of the survey to understand the knowledge and clarity of patients about the treatment they underwent.

Figure 12: Pre-Surgery Counselling

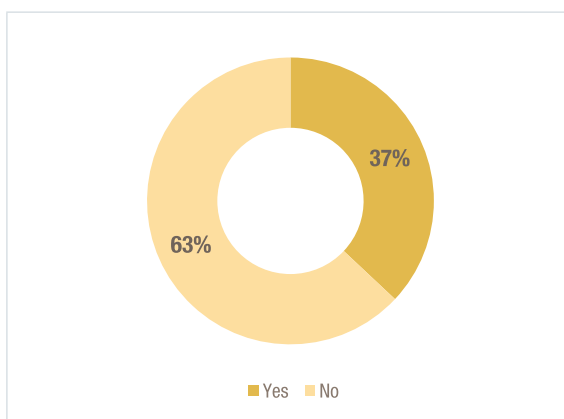
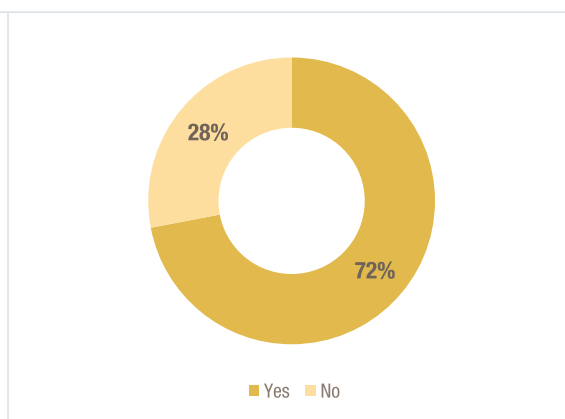
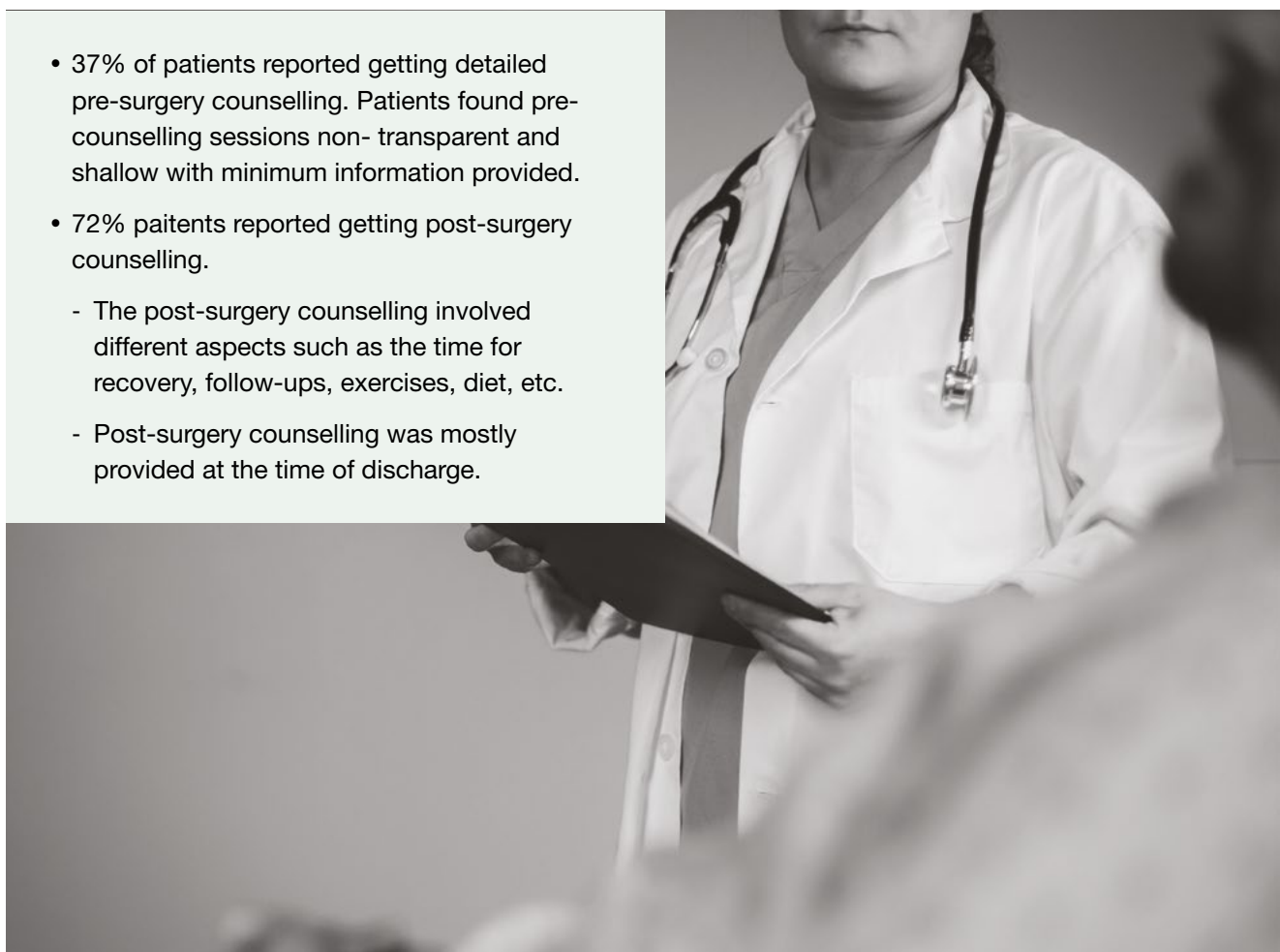


Figure 13: Post-Surgery Counselling



### Key Findings:

- 37% of patients reported getting detailed pre-surgery counselling. Patients found pre-counselling sessions non-transparent and shallow with minimum information provided.
- 72% patients reported getting post-surgery counselling.
  - The post-surgery counselling involved different aspects such as the time for recovery, follow-ups, exercises, diet, etc.
  - Post-surgery counselling was mostly provided at the time of discharge.





# Survey Findings: Measuring Satisfaction of Patients on Different Services/Facilities

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The survey results of 280 responses from patients were mapped on a scale of five from Poor (1) to Excellent (5) for different services and facilities of Healthcare Service Providers. The mean rating (out of 5) was calculated for all 280 responses of patients and is depicted below in the table.

**Table 2: Overall Satisfaction Level of Patients on Different Services/Facilities**

S.No.	Services and Facilities	Rating (out of 5)
1	Registration Process	2.78
2	Room Facilities	2.82
3	Staff- Skills, Behaviour, and Availability	2.91
4	Doctors' Availability and Behaviour	3.12
5	Infrastructure Facilities for Surgeries	2.88
6	Discharge Process	2.80
7	Overall	2.89

## Key Findings:

- Doctors' availability and behaviour have an overall mean rating of 3.12 out of 5, equivalent to a rating of good.
- All other stages of services/facilities have an overall rating of average.
- The registration process has the lowest mean rating of 2.78 out of 5.





## Registration Process

The survey questionnaire emphasized understanding the satisfaction level of patients during the registration process on three parameters depicted in the table below.

**Table 3: Satisfaction Level of the Patients during the Registration Process**

Parameters	Cities						Overall
	Ahmedabad	Bengaluru	Chennai	Delhi	Mumbai	Kolkata	
The Mannerism and Efficiency of the Staff at Registration	2.78	2.48	2.68	3.24	3.10	3.33	2.94
Management of People (Patients/Families) at the Registration Process	2.67	2.52	2.62	3.20	3.02	2.94	2.83
Facilities for Senior Citizens/ Persons with Disabilities/ People using Mobility Aids	2.52	2.60	2.20	2.80	2.81	2.53	2.58
Overall	2.66	2.53	2.50	3.08	2.98	2.93	2.78

## Key Findings:

- The average time taken for registration was between 1 hour to 1.5 hours.
- The satisfaction level of patients ranged from 2.48 to 2.78, equivalent to 'average' for all three parameters - the mannerism of staff, management of people, and facilities for senior citizens/ PWDs.
- The mannerism of staff at registration reportedly was good as per the patients of Delhi, Mumbai, and Kolkata.
- The management of people at the registration counter was also good as per the patients of Delhi and Mumbai.
- Patients overlooked facilities for senior citizens/PWD. However, they shared that mostly the registration counter was barrier-free.





## Rooms Facilities

The satisfaction level of room facilities varies for patients due to the difference in the room facilities (private/general) used. The rating indicates the mean of responses from all the patients on different parameters of room facilities.

**Table 4: Satisfaction Level of the Patients on Room Facilities**

Parameters	Cities						Overall
	Ahmedabad	Bengaluru	Chennai	Delhi	Mumbai	Kolkata	
Room Size	3.13	2.60	2.18	2.61	2.94	2.95	2.73
Bedding for the Patient	3.13	3.31	2.91	3.40	3.22	2.87	3.14
Stay Arrangement for Attendant	3.20	2.56	2.29	2.69	2.90	2.71	2.72
Hygiene Kit	3.15	2.52	2.62	2.62	3.22	2.71	2.81
Covid/Safety Protocols	3.20	2.54	2.50	2.72	3.02	2.79	2.79
Hygiene and Cleanliness in Rooms	3.15	2.62	2.57	2.89	3.00	2.85	2.85
Temperature Management in Rooms	3.23	2.58	2.24	2.59	3.02	2.74	2.73
Privacy of Patient	3.30	2.54	2.47	2.45	2.86	2.69	2.72
Cleanliness and Hygiene of Toilets	3.10	2.62	2.44	2.65	3.32	3.28	2.90
Overall	3.18	2.65	2.47	2.74	3.06	2.84	2.82

## Key Findings:

- Within the cities, the ratings of Ahmedabad (3.18) and Mumbai (3.06) were better compared to other cities for room facilities.
- The survey included patients from 2019 onwards, so the impact of COVID protocols on improved hygiene and sanitation was observed and reported by patients. However, few patients highlighted non-compliance to COVID protocols by junior staff as they were not wearing the mask.
- Hygiene kit as such was not made available in the hospitals.
- The toilets had basic toiletries such as soap, water, and tissue paper.



## Staff- Skills, Behaviour, and Availability

The survey included a section on measuring the satisfaction level of patients related to their experience with the staff while they were in the hospital. The findings are indicated below in the table.

**Table 5: Satisfaction Level of the Patients for Staff**

Parameters	Cities						Overall
	Ahmedabad	Bengaluru	Chennai	Delhi	Mumbai	Kolkata	
The Mannerism and Efficiency of the Paramedical Staff	3.03	2.68	2.4	2.71	2.94	3.44	2.87
Attentiveness of Staff	3.23	2.64	2.46	2.66	2.96	3.21	2.86
Response to Patient Needs	3.15	2.46	2.36	2.79	3.06	3.63	2.91
Maintaining Hygiene while Administering Medicines	3.30	2.64	2.46	2.80	3.16	3.67	3.00
Skilful in Administering the Medicines or any other Procedures	3.13	2.80	2.40	2.74	3.16	3.54	2.96
Skills in Transferring Patients from Bed to Stretcher/Wheelchair	3.13	2.70	2.38	2.57	3.04	3.67	2.91
Behaviour towards Patient's Attendant	3.13	2.50	2.48	2.5	2.96	3.44	2.83
Availability of Male/ Female Staff Based on Need	3.28	2.58	2.64	2.49	3.10	3.72	2.97
Overall	3.17	2.63	2.45	2.66	3.05	3.54	2.91

## Key Findings:

- Overall, the rating is 2.91, i.e., an average level of satisfaction among patients.
- Ahmedabad, Kolkata, and Mumbai patients rated their satisfaction with staff as good.
- Patients from Chennai were least satisfied in comparison to other cities.
- Patients of a few hospitals were dissatisfied with the responsiveness of the staff. In a few instances, the staff was rude as well.



## Doctors' Availability and Behaviour

As observed in the initial section of the report, patients gave maximum importance to the doctors for their treatment. Hence, the availability and behaviour of doctors are essential components of the survey.

**Table 6: Satisfaction Level of the Patients for Doctors' Availability and Behaviour**

Parameters	Cities						Overall
	Ahmedabad	Bengaluru	Chennai	Delhi	Mumbai	Kolkata	
Visit of Doctors	3.13	3.30	3.10	3.18	3.07	4.33	3.35
Availability on Calls in Case of Patients Need	3.13	2.52	2.14	2.23	3.22	4.18	2.90
Listening Patients Concerns	3.23	3.00	2.90	3.14	3.30	3.76	3.22
Explanation of the Treatment to Patients and Attendants	3.23	2.58	2.30	3.20	3.11	3.68	3.02
Instructions Regarding Treatment to Paramedical Staff	3.25	2.80	2.16	3.10	3.09	3.51	2.98
Behaviour Towards Patient's Attendant	3.25	3.10	2.08	2.90	3.16	3.59	3.01
Guidance for Pre-Surgery or Post-Surgery Care	3.25	2.38	2.38	3.10	3.22	3.79	3.02
Qualification and Experience of Doctors	3.38	3.30	2.40	3.34	3.51	4.69	3.44
Overall	3.23	2.87	2.43	3.03	3.21	3.94	3.12

## Key Findings:

- The ratings indicate that most of the patients had a good experience with the doctors.
- Delhi, Mumbai, Ahmedabad, and Kolkata patients gave positive reviews of the doctors.
- Chennai and Bengaluru patients were averagely satisfied with doctors.
- The highest rating was received for 'Qualification and Experience' (3.44) and 'Visit of Doctors' (3.35).
- Doctors' assurance of successful operation and motivation for fast recovery was praised by patients.
- Politeness in doctors was also appreciated by the patients.



## Infrastructure Facilities for Surgeries

The infrastructure facilities for surgeries have received different ratings on different parameters, as depicted in the table below.

**Table 7: Satisfaction Level of the Patients for Infrastructure Facilities**

Parameters	Cities						Overall
	Ahmedabad	Bengaluru	Chennai	Delhi	Mumbai	Kolkata	
Waiting Area for Attendants	3.18	3.30	2.80	2.77	2.60	2.67	2.88
Updates to Attendants on Surgery	2.80	2.40	2.60	2.20	2.90	2.50	2.57
Transfer Process from Operation Theatre to the Wards/Rooms	3.45	3.20	2.59	3.11	2.74	2.68	2.96
Time Accuracy for Performing the Surgery	3.40	3.50	2.73	3.24	2.66	3.03	3.09
Overall	3.21	3.10	2.68	2.83	2.73	2.72	2.88

## Key Findings:

- Patients had limited knowledge of machines/infrastructure used for surgeries. They were not able to provide their views on the same. However, few patients related good reputation of the hospital with good infrastructure.
- Few patients reported that the waiting area was not close to the operation theatre, making it difficult for attendees to get timely updates.
- Few patients voiced out delays in the surgery after entering the operation theatre.





## The Discharge Process

The section covers parameters that would have helped patients in having a lasting memory of the Healthcare Service Provider. The table below depicts patients' satisfaction with different parameters during the discharge process.

**Table 8: Satisfaction Level of the Patients during the Discharge Process**

Parameters	Cities						Overall
	Ahmedabad	Bengaluru	Chennai	Delhi	Mumbai	Kolkata	
Timely Information to Patient/Attendant on Discharge Date and Time	3.15	3.16	2.18	2.71	2.52	2.87	2.77
Readiness of Staff for Discharge	3.15	2.72	2.37	2.63	2.82	2.84	2.75
Filing of Patients' Papers Related to Treatment	3.38	3.16	2.43	2.50	2.82	2.72	2.83
Maintenance of Digital Records of Patients for Follow-ups	3.38	2.74	2.41	2.38	2.82	2.72	2.74
Proactiveness in Staff for Discharge	3.28	3.46	2.37	2.73	2.80	2.87	2.92
Timely Updates from the Billing Team	3.38	2.88	2.33	2.27	2.90	2.79	2.76
Help from Staff in the Discharge Process	3.28	3.16	2.35	2.54	2.68	2.82	2.80
Overall	3.28	3.04	2.35	2.54	2.77	2.80	2.80

## Key Findings:

- The average time for the discharge process was 2.1 hours.
- The overall rating for the discharge process is 2.8, projecting satisfaction levels ranging from average to good.
- The rating of Patients from Bengaluru and Ahmedabad indicates good service during the discharge process. For all other cities, patients rated it as average.
- Due to limited beds in some hospitals, the discharge of patients was rushed to accommodate new patients.



## Overall Satisfaction Levels of the Healthcare Service Provider

Based on the ratings provided by 280 patients on different categories of services/facilities from the initial stage of registration to the discharge process, the rating was estimated city-wise and overall. The findings are depicted below in the table.

Table 9: Overall Satisfaction Level with the Healthcare Services for Surgery

City	Delhi	Mumbai	Bengaluru	Chennai	Ahmedabad	Kolkata	Overall (out of 5)
Rating based on satisfaction level with Healthcare Services	3.16	2.79	2.45	2.78	3.02	3.16	2.89

### Key Findings:

- The overall satisfaction level of patients for Healthcare Service Providers was rated as average.
- Patients felt that the health services are still hospital-centric and not patient-centric.
- 62% agreed to recommend the hospital to others for similar surgeries.
- 38% did not want to recommend the hospital for the following reasons:
  - Availability of better services in other hospitals
  - Lack of transparency related to treatment.
  - Behavioural issues of staff and doctors
  - The doctor is no longer associated with the hospital.
  - Some of the patients also reported that they compared the cost of surgery afterward and found that there are other options available in the city which are more affordable.





# Conclusion and Way Forward

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The survey was intended to analyse the perceptions of patients and their overall experience based on the results of a survey instrument with their recent surgery. It was a short survey with only 280 patients, conducted from June-July 2022. The findings do not provide ratings for healthcare service providers and cannot be used for drawing inferences. However, the survey helps provide insights into the continuum of surgery through the patients' experiences.

#### **Key insights:**

- **Poor Assistance:** 81% of the patients in the survey underwent surgery for the first time in their life. They raised their concerns about inadequate guidance and assistance during the entire process of surgical treatment and voiced the need for assistance in clearing their doubts and providing support during the process.
- **Lack of Transparency on Treatment Costs:** Patients in the survey reported a lack of transparency related to treatment costs. An explanation of the same can be beneficial in making patients more prepared, involved, and informed.
- **Higher Surgery Cost and Affordability:** The cost of surgeries was higher, especially in private hospitals. Most of the patients belonged to the middle class and used their savings for surgical treatments due to high surgical treatment costs. Patients expressed the need to make surgeries affordable for all economic groups along with different modes of payment such as EMI options, credit systems, or monthly saving plans for elective surgeries.
- **Difficulty in Identifying Healthcare Service Providers:** Patients were dependent on recommendations from consulting doctors or friends and families for identification and selection of healthcare service providers as there is a gap in information on doctors and healthcare services providers.
- **Non-availability of Advanced Surgical Treatment Facilities in Non-metro Cities:** The expenditure on treatment is twofold for patients from other cities as medical expenses with boarding/lodging expenses increase the financial burden on them. Such patients demanded good surgical facilities in non-metro cities.
- **Poor Coverage Under Health Insurance:** Non-availability of health insurance among patients was a concern as the cost of surgical treatments was borne by patients as an out-of-pocket expense. Also, those covered under health insurance failed to utilise it due to limited coverage. There is a need for more information and coverage on health insurance-based services.

Healthcare Service providers are now trying new things and also leveraging technology to meet with these patient expectations, which are heightened due to the seamless experiences that other industries have taught consumers to expect.

Also, New Age Health Care Service Delivery Models are emerging which are addressing end-to-end patient treatment and operational needs with transparency and standardization. They are providing **assistance** to ease patients' treatment journey.

If the model synchronizes with the expectation of the patients, it can present the patient with a seamless experience and provides an overall frictionless healthcare experience.



# Annexure

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## Patient Case Studies on Emerging New Age Trend in Surgical Care

### Mrs Sharma , 40, Homemaker

Hello, I am Mrs Sharma , a homemaker from Mumbai. Taking care of my house and my family has always been one of my top priorities. I take pride in that and especially in my cooking. Making delicious meals for my family has always brought joy to me and I am very particular about it. But, things began to change in the beginning of this year, when I started to notice errors in my work.

I was struggling to do the usual chores which was quite odd for me. It started with putting too much salt in food and slowly progressed to minor mishaps in my daily chores. Eventually, I realised that this was happening because my vision had begun to blur. I would have to squint my eyes to complete the simplest of tasks. But this wasn't all, slowly things got worse. I would develop acute headaches that would last days. It was so bad that I could barely function.

It was at this point that my husband stepped in to help. It's only when your eyes tend to blur that you realise the importance of vision and how it impacts your life. We were worried I was losing my sight and that this was serious. So, he took me to a doctor for consultation.

A few tests later, I was diagnosed and advised to undergo cataract surgery in both the right and left eye. But even the thought of surgery was scary and quite daunting for us. My husband began to search for a good hospital, but soon realised that there's much more to the process of getting a surgery than what meets the eye. We had very limited knowledge about the specifications and on top of it our health insurance also was yet to be reviewed. It was going to be a very challenging task.

Around this time, my husband came to know about a healthcare company providing end-to-end assistance for secondary healthcare and our entire outlook towards surgery changed from this point onwards.

- We were assigned a care counsellor, to ease our treatment journey. He ensured we book the best hospitals, recommended highly experienced doctors, took care of billing and insurance, and a lot more. He was empathetic and always available.
- It started with getting a hospital most suited for our needs. They analysed and gave us the best fit, based on its distance, accessibility, positive outcome rate and our budget.
- The care counsellor then scheduled my surgery for April 2022 and then took care of the post-discharge formalities as well.
- The care counsellor even sorted out all the financial complications that usually come with seeking secondary healthcare.
- On top of all this, the care counsellor even arranged for the transportation from home to the hospital and back, which I think was incredible.
- The conduct of the team, both in terms of remote and in-person assistance, especially the care counsellor, was very supportive and reassuring and that helped me cope better with the stress and anxiety of undergoing a surgery.

When we first got to know about cataracts and that I would have to undergo surgery, both my husband and I were very nervous. We expected to be overwhelmed and scared but the experience turned out to be truly stress-free, to our pleasant surprise. With a combination of physical and remote assistance, this healthcare company provided us with an impressive healing experience.

Thank you!



**Mr Sawant, 41, Professional**

For a patient, the thought of hospitalisation is often followed by tension and anxiety. This usually stems from a lack of awareness about the complex processes one has to take care of before and after getting treated. For me, this anxiety was doubled after a stressful experience in the past.

A few years ago, I was admitted to a hospital for typhoid. I remember how helpless I felt, having to take care of everything, from the right documents, the insurance coverage and completing other administrative processes. And I was doing all this alone while undergoing treatment. It was hectic and too much to handle. I didn't want to go through that again, especially when this time it was a surgery.

Last year, I developed acute pain in the side and lower back of my body and consulted a doctor. I was then detected with seven kidney stones and prescribed medication. While the medicines helped dissolve five of them, the other two had grown considerably. By January 2022, one was around 12 mm while the other 10 mm and were causing acute pain. This meant that I had to be hospitalised and undergo surgery, something that I was very anxious about. The doctor confirmed surgery and I began my search for the best suited hospital.

I did not want to repeat my previous experience and was looking for a better way than doing it all by myself. That is when I got to know about a healthcare company through an online search, that provided end-to-end assistance in surgeries and thought of giving it a try. And, from that point onwards there was no looking back and I am happy I did that.

- When searching for a hospital, my biggest concern was the quality and availability of cashless payment that would allow me to complete the processes via my Mediclaim. And this company took care of both and did much more to my pleasant surprise.
- They assigned me a care counsellor, who was to help me through the entire process of pre and post-surgery, every step of the way. From this point onwards, I didn't even have to lift a finger because the care counsellor did everything. All I had to do was be ready for my surgery and focus on getting better.
- The care counsellor scheduled all my doctor consultations, according to my convenience and time.
- I had to undergo three surgeries over three months for kidney stones, and for each one of them, they took care of all doctor appointments, insurance claims, post-operative follow-ups, etc.
- The care counsellor even arranged for cab service to pick up and drop to the hospital and back home, for each surgery.

This experience provided by the healthcare company's remote and physical team has really changed my perspective towards secondary healthcare. Now it is becoming all about making it hassle-free for the patient and I am thankful for that!













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