

HOSPITAL SCENARIO IN 2020 AND MANAGEMENT OF HOSPITAL SERVICES

Prof. Mohammad Masood Ahmed

M.H.Sc.(Public Health),M.Sc.(Psych),M.B.A., M.Com., M.A. (Eco.), M.Phil. (Mgt)

Director

MESCO Institute of Management and
Computer Sciences

AGENDA

- Global Healthcare Scenario
- Management of Hospital Services
- Conclusion



GLOBAL HEALTHCARE SCENARIO



A photograph of a long, empty hospital corridor. The floor is made of large, light-colored square tiles with dark grout, creating a checkered pattern. The walls are a light, neutral color. The ceiling is a complex, vaulted structure with many small, rectangular panels. Light enters from windows on the right side of the corridor, creating a bright, airy atmosphere. The corridor leads to a bright, arched doorway at the far end.

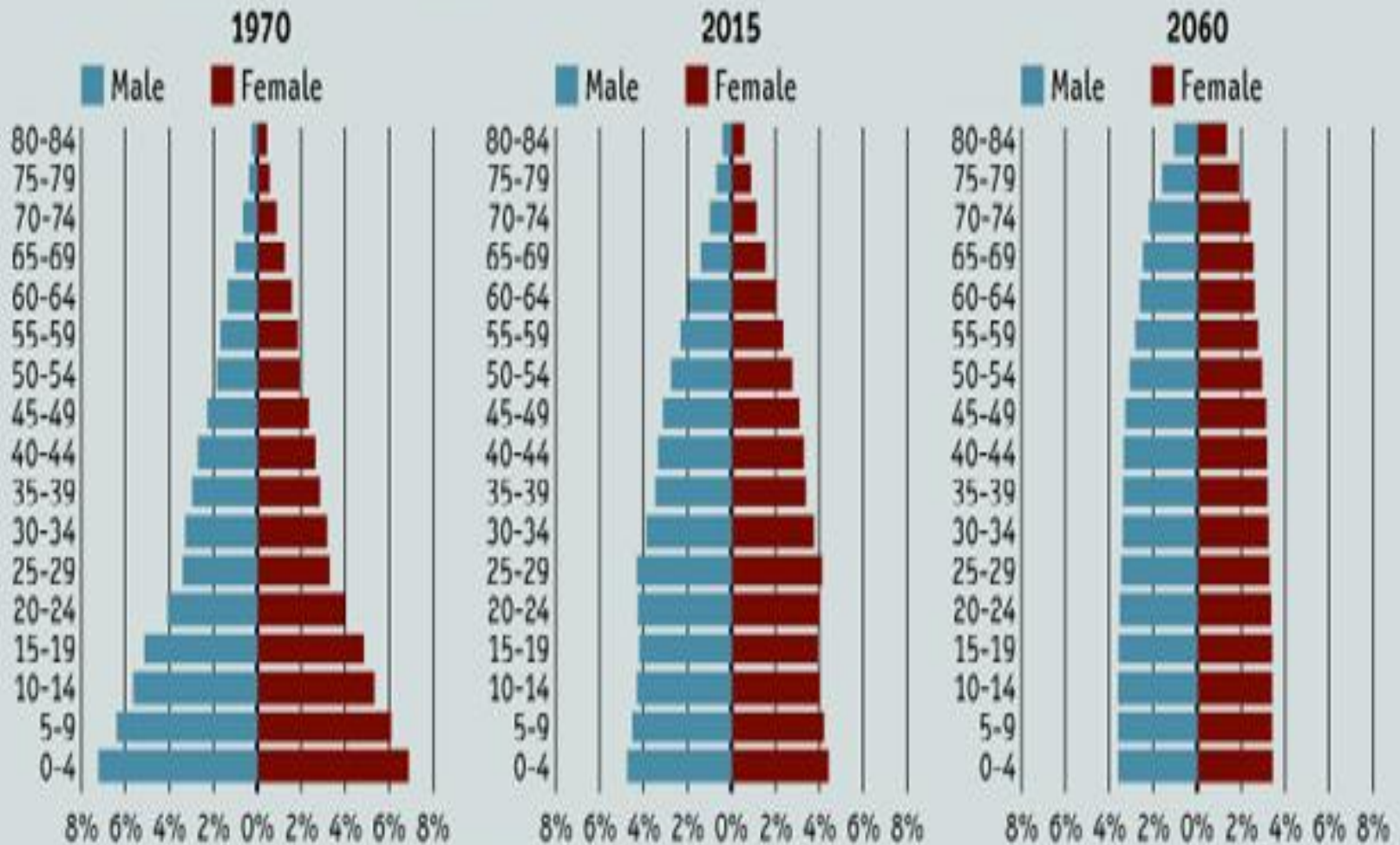
10 BIGGEST HOSPITALS IN THE WORLD

pastimers



Population pyramid: A thing of the past?

(Global population, % of total)

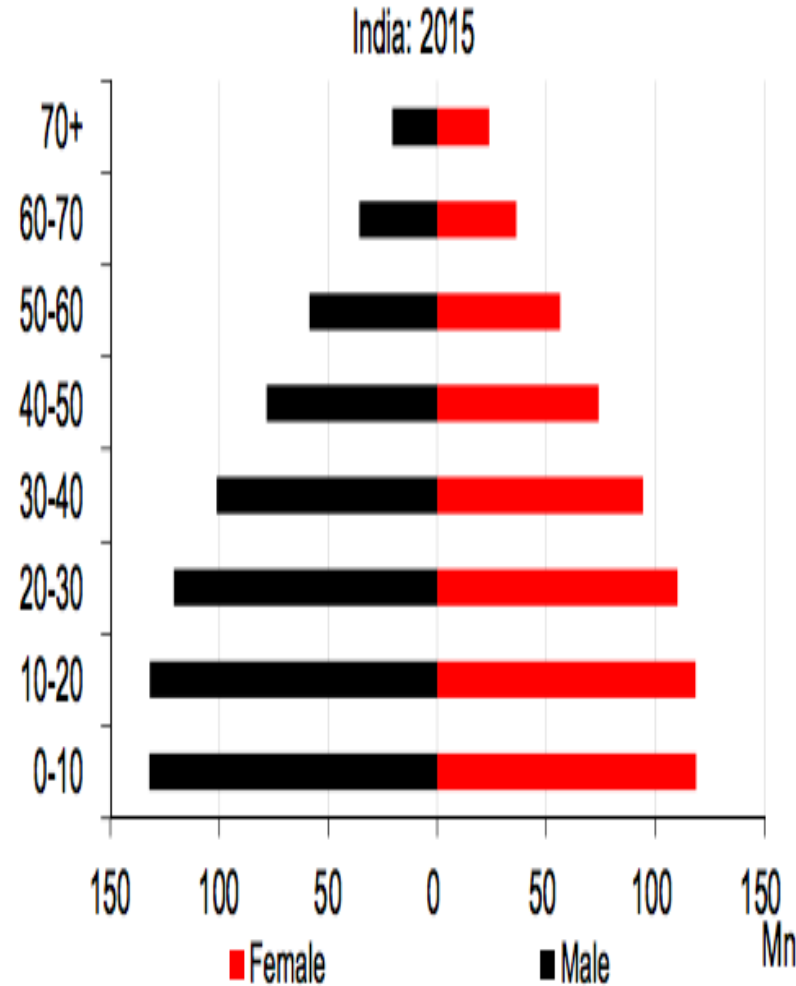


Sources: World Population Prospects: The 2012 Revision, Medium Variant.

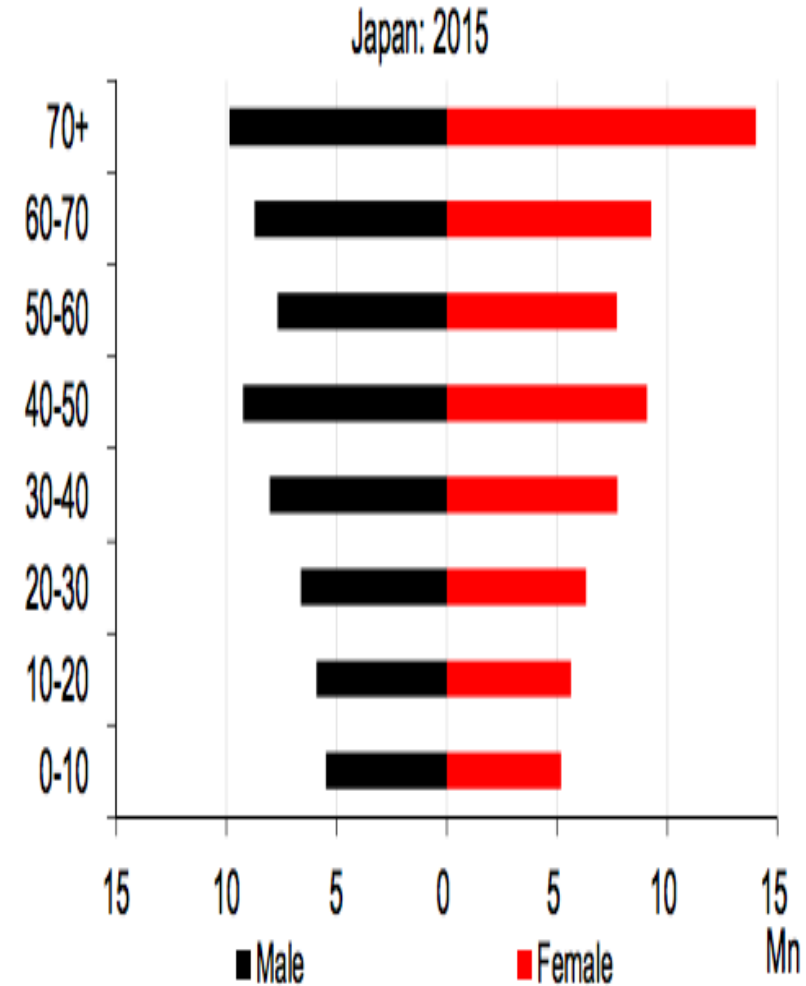


India's population pyramid is very different...

...to Japan's inverted one



Source: HSBC, UN Population Division



Source: HSBC, UN Population Division

Figure 5

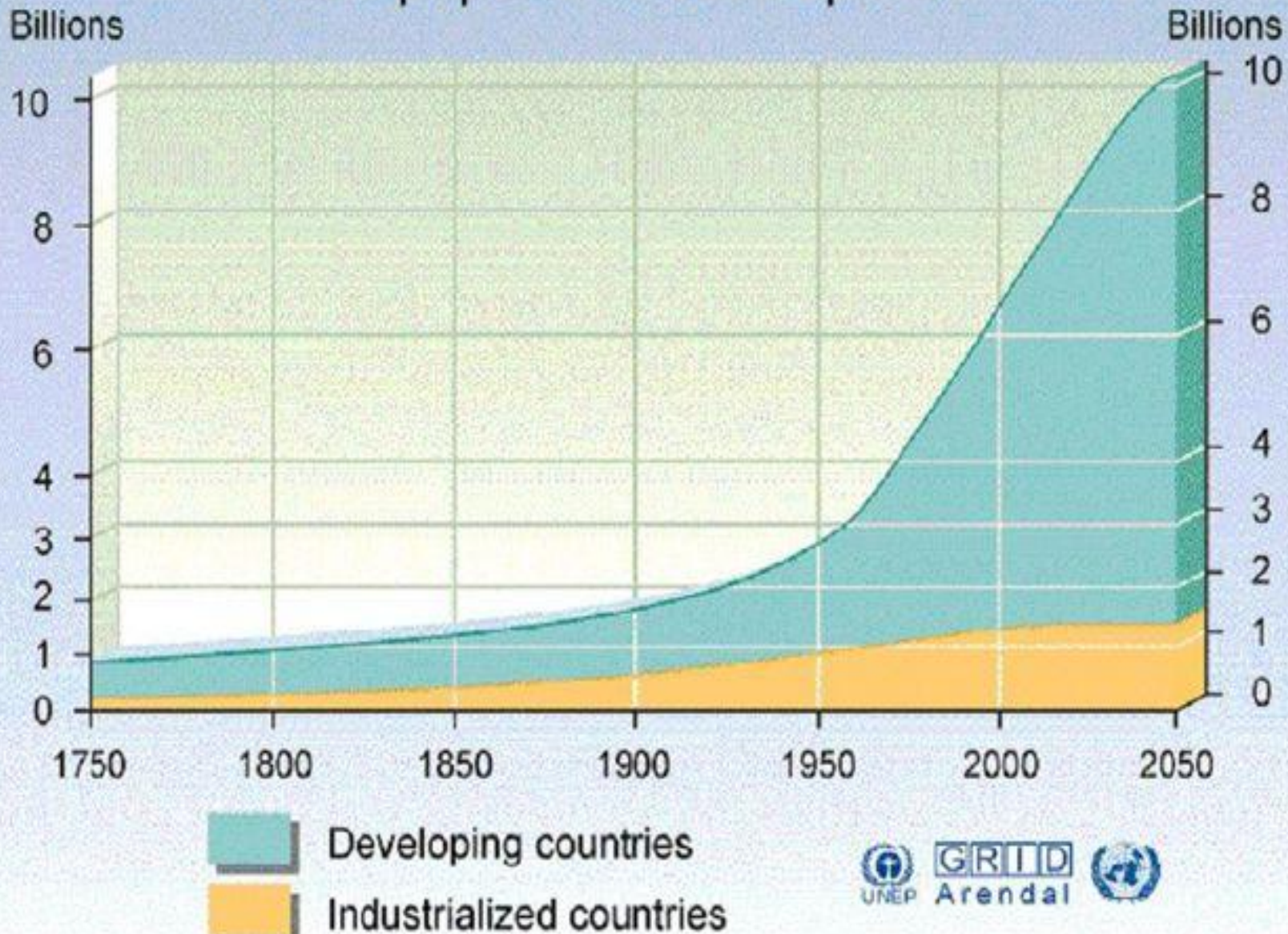
Life Expectancy Forecasts, G-8 And BRIC Countries

Country	2045-2050	2095-2100
Australia	86.0	91.0
Canada	85.0	90.1
France	85.8	90.8
Germany	84.9	90.0
Italy	85.7	90.6
Japan	87.4	92.3
United Kingdom	84.3	89.4
United States	83.0	88.2
Brazil	79.4	84.0
China	79.1	84.2
India	73.7	79.5
Russian Federation	75.5	81.8

Source: United Nations



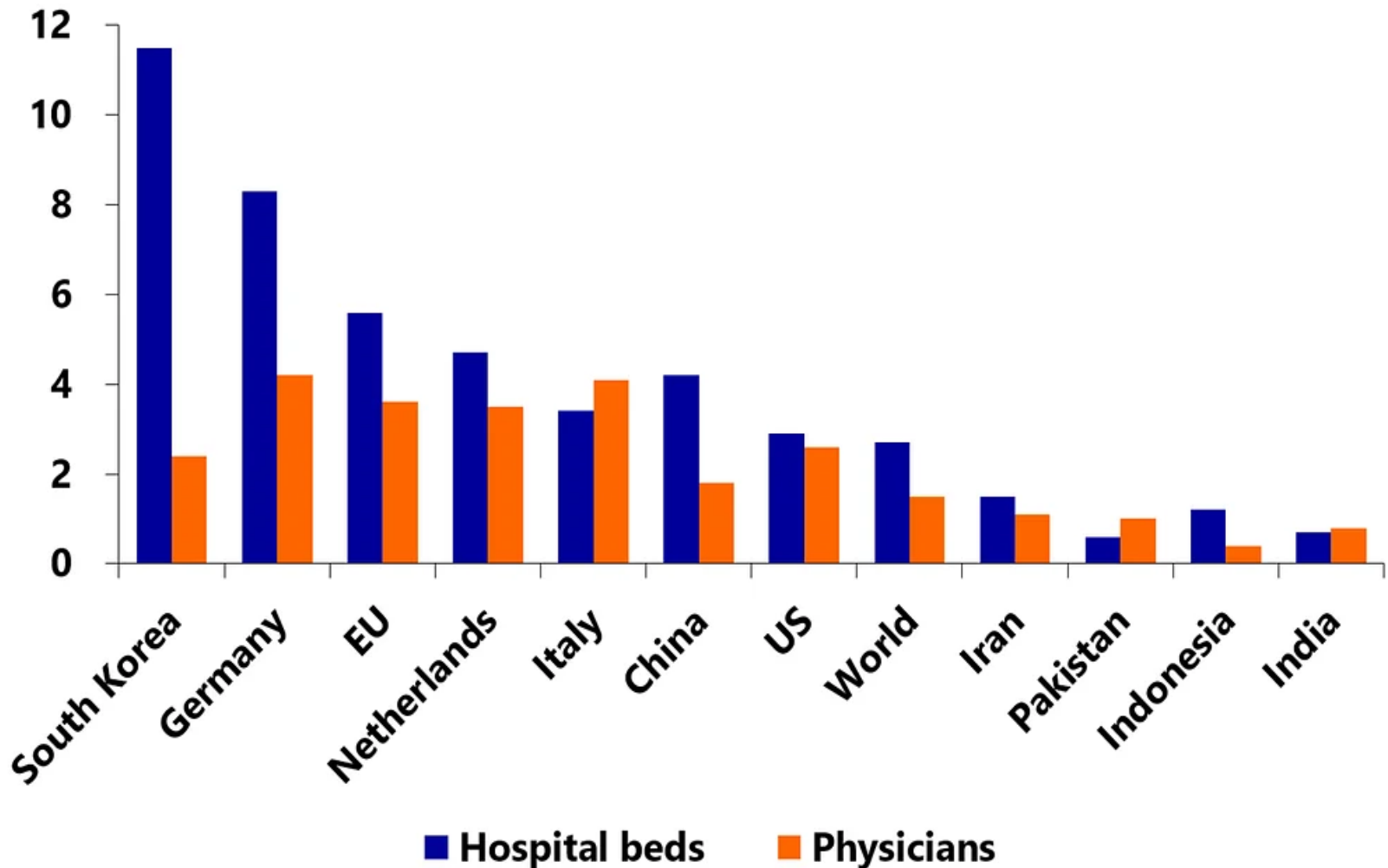
World population development





Healthcare Is Less Abundant In India Compared To Global Average

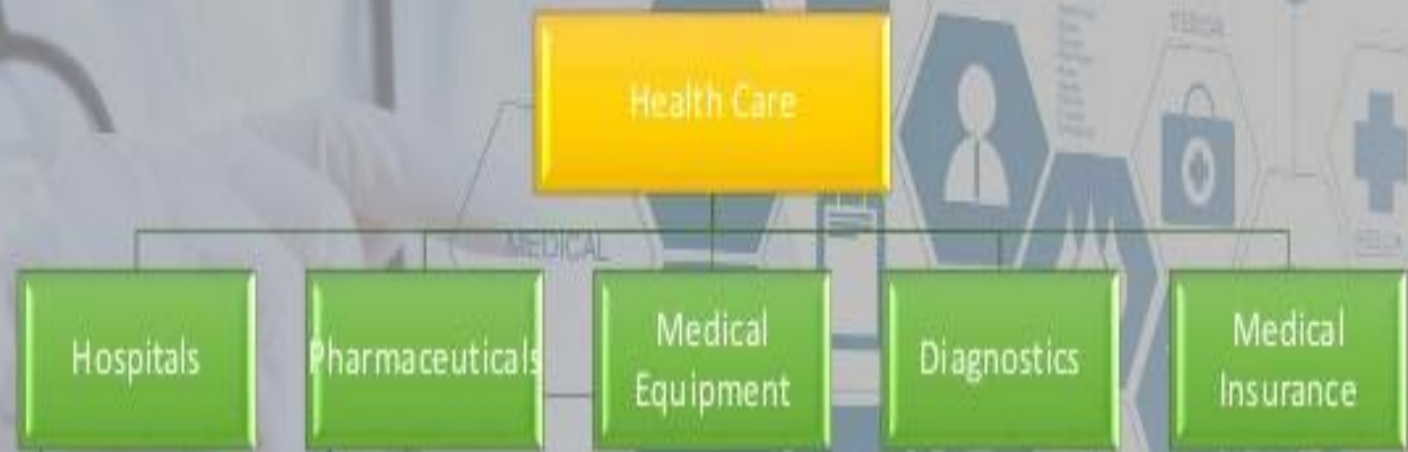
Per 1000 persons



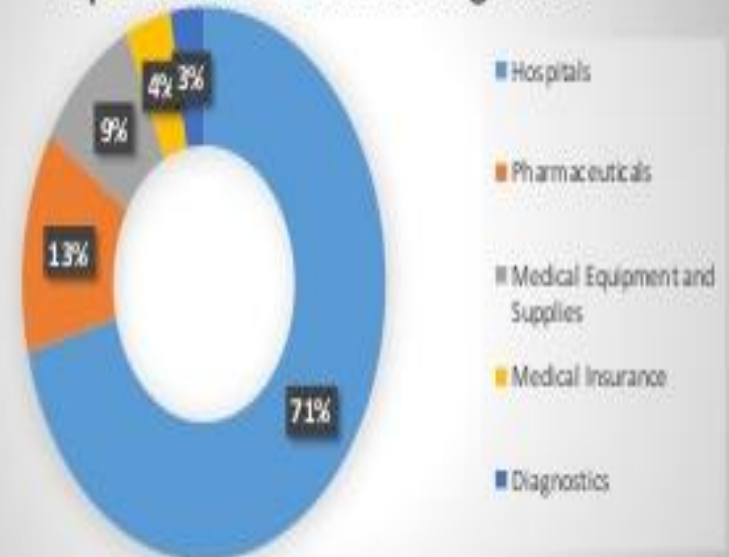
Source: World Bank

MESCO Institute of Management & Computer Sciences, Mustaidpura, Hyderabad.

Segments of HealthCare Industry

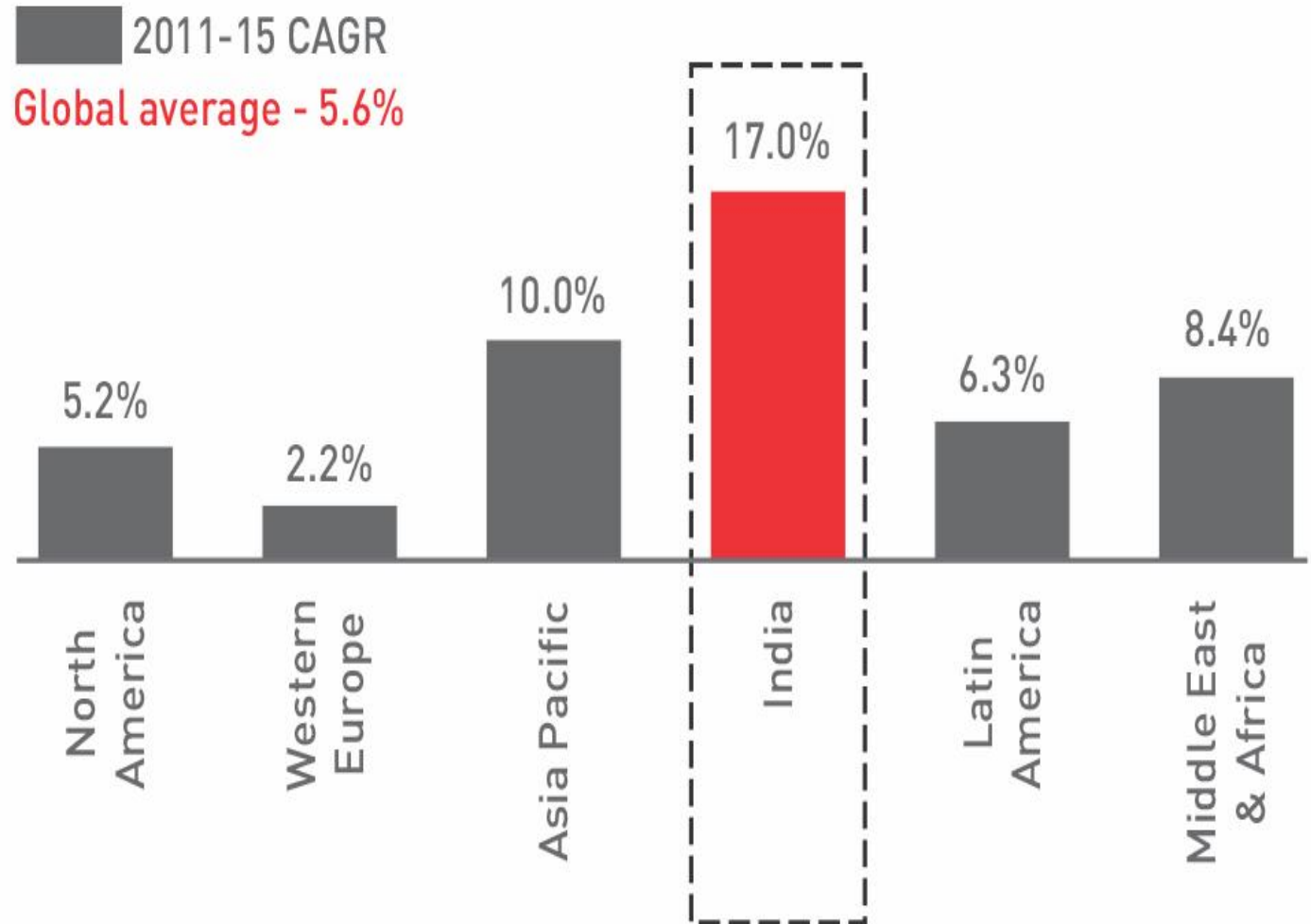


Expenditure on Various Segments



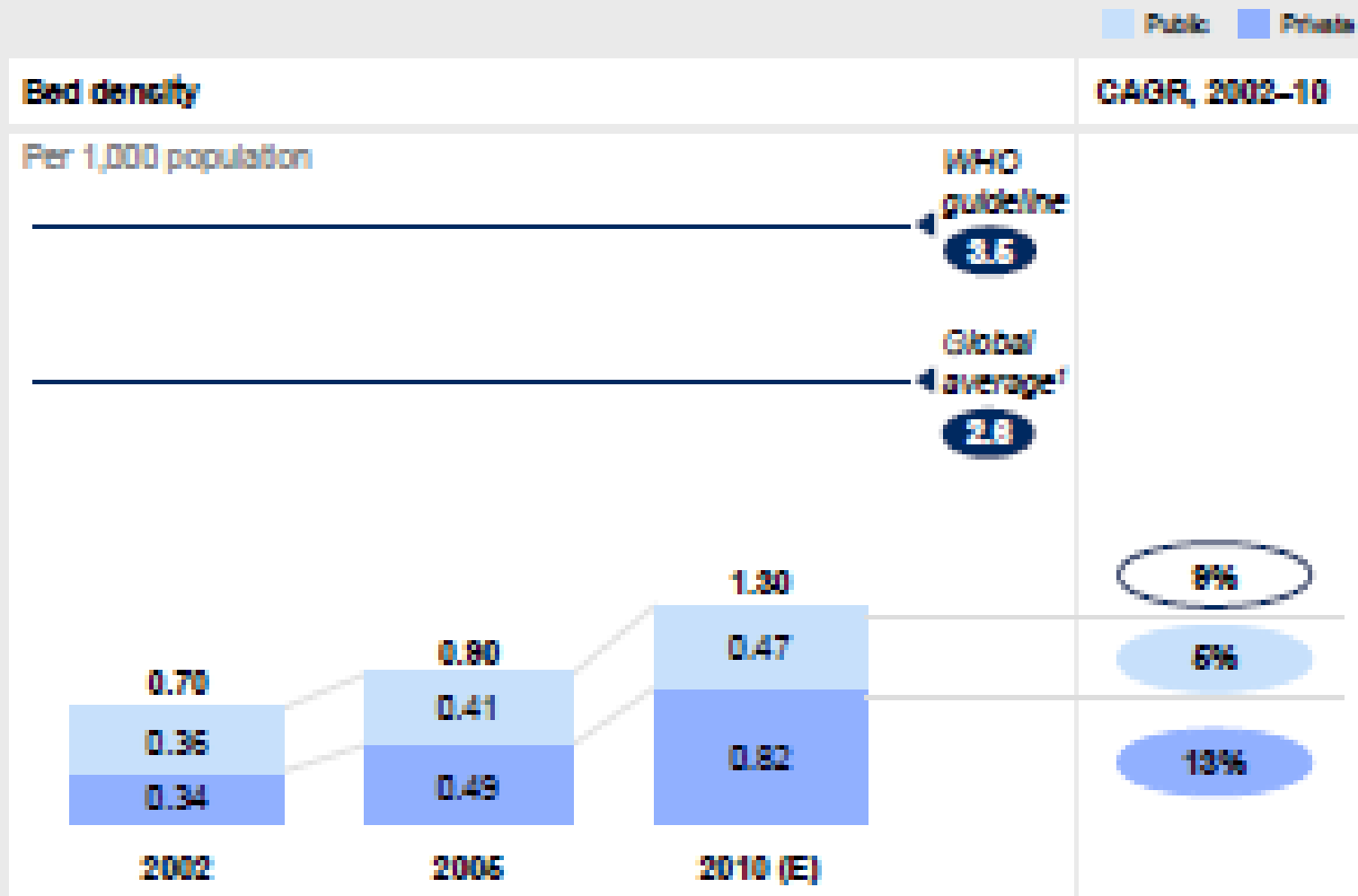


Indian Healthcare is among the fastest growing globally...





Health Infrastructure is well below WHO guidelines



1 For 2002

SOURCE: Central Bureau of Health Intelligence, Health Infrastructure, 2002 and 2010, World Bank database, World Development Indicators (WDI), World Health Organisation, Global Health Expenditure Database, ADB/ICP/AM, McKinsey analysis



2016–17 Best Hospitals Honor Roll

- Mayo Clinic, Rochester, Minn.
- Cleveland Clinic
- Massachusetts General Hospital, Boston
- Johns Hopkins Hospital, Baltimore
- UCLA Medical Center
- New York-Presbyterian University Hospital of Columbia and Cornell
- UCSF Medical Center, San Francisco
- Northwestern Memorial Hospital, Chicago
- Hospitals of the University of Pennsylvania-Penn Presbyterian, Philadelphia
- NYU Langone Medical Center

INDIA'S SHARE IN GLOBAL HEALTH PROBLEMS

- 17% of the population
- 2% of land
- 21% of global burden of disease
- 23% of the child deaths
- 26% of the childhood vaccine preventable deaths
- 20% of the maternal deaths
- 68% of the leprosy cases
- 30% of tuberculosis
- 1% of motor vehicles but bears the burden of 6% of vehicular accidents

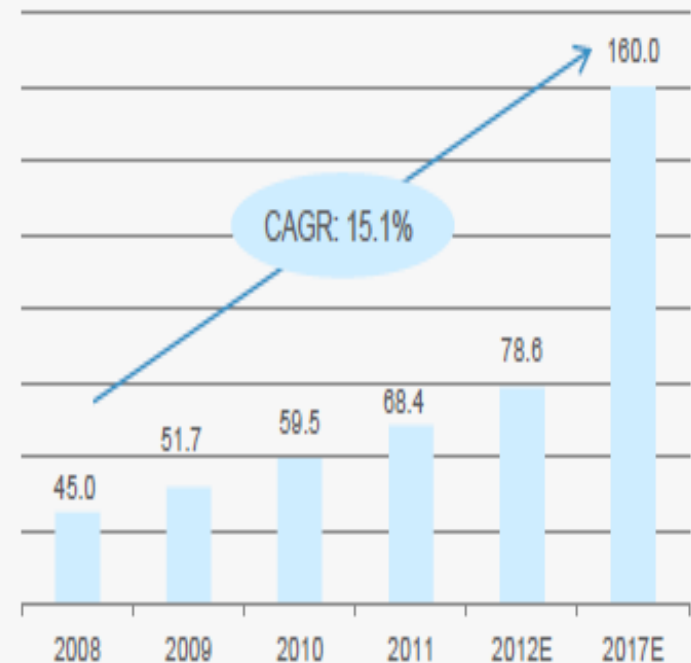




STRONG GROWTH IN HEALTHCARE EXPENDITURE OVER THE YEARS

- * Healthcare sector has progressed at an impressive pace over the past few years; during 2008–17, the market is expected to record a CAGR of 15.1 per cent
- * By 2017, the total industry size is expected to touch USD160 billion

Healthcare sector growth trend (USD billion)

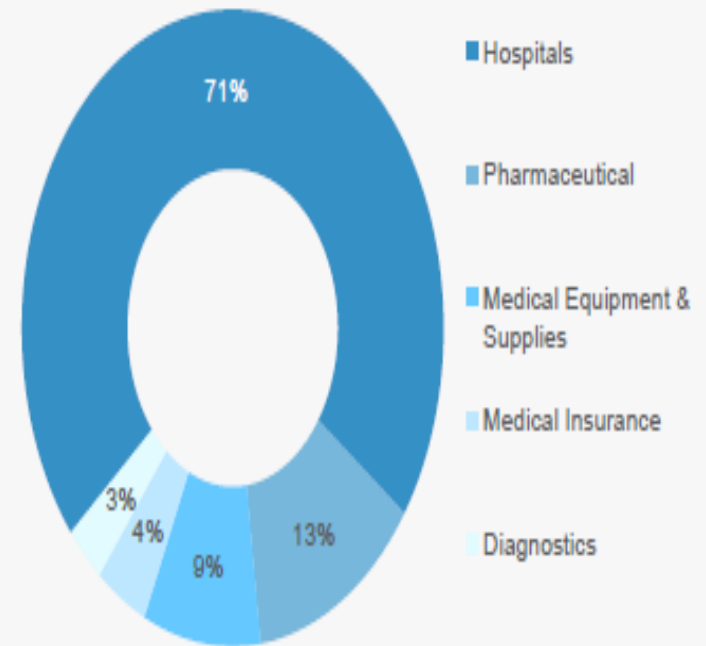


Source: Frost & Sullivan, LSI Financial Services, Aranca Research

HOSPITALS ACCOUNT FOR MAJOR SHARE OF TOTAL HEALTHCARE REVENUES IN INDIA







- * Of total healthcare revenues in the country–
 - * Hospitals account for 71 per cent
 - * Pharmaceuticals for 13 per cent
 - * Medical equipment and supplies for 9 per cent

Market break-up by revenues 2012E



Source: Hospital Market – India by Research on India,
Aranca Research
Note: 2012E – Estimates for 2012

KEY PLAYERS IN THE MARKET

	Company	No of beds*	Presence
	Apollo Hospitals Enterprise Ltd	8,717	Chennai, Madurai, Hyderabad, Karur, Karim Nagar, Mysore, Visakhapatnam, Bilaspur, Aragonda, Kakinada, Bengaluru, Delhi, Noida, Kolkata, Ahmedabad, Mauritius, Pune, Raichur, Ranipet, Ranchi, Ludhiana, Indore, Bhubaneswar, Dhaka
	Aravind Eye Hospitals	3,649	Theni, Tirunelveli, Coimbatore, Puducherry, Madurai, Amethi, Kolkata
	CARE Hospitals	1,912	Hyderabad, Vijayawada, Nagpur, Raipur, Bhubaneswar, Surat, Pune, Visakhapatnam
	Fortis Healthcare Ltd	12,000	Mumbai, Bengaluru, Kolkata, Mohali, Noida, Delhi, Amritsar, Raipur, Jaipur, Chennai, Kota
	Max Hospitals	1,973	Delhi, NCR, Punjab, Uttarakhand
	Manipal Group of Hospitals	4,900	Udupi, Bengaluru, Manipal, Attavar, Mangalore, Goa, Tumkur, Vijaywada, Kasaragod, Visakhapatnam

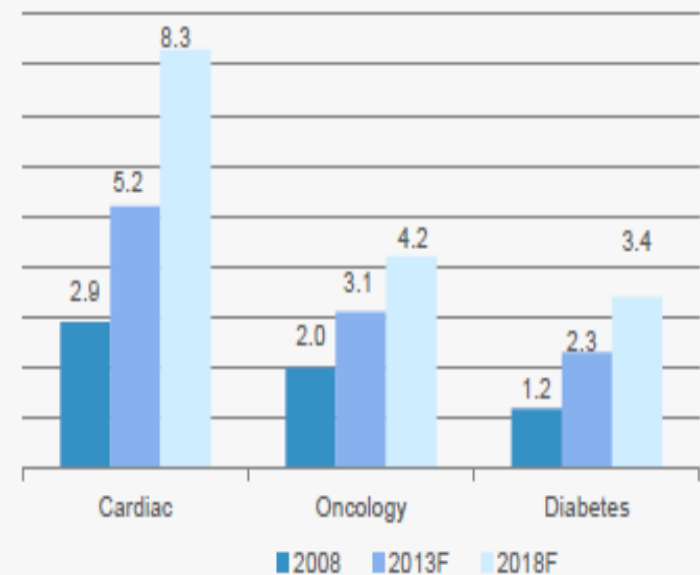
Source: Company websites, Fortis Red Herring Prospectus, Aranca Research

Note: * - No of beds include owned subsidiaries, joint ventures and affiliations

LIFESTYLE DISEASES AND GROWING AWARENESS TO INCREASE HOSPITALISATION

- * Increased incidences of lifestyle diseases such as heart disease, obesity and diabetes have contributed to rising healthcare spending by individuals
 - * Lifestyle diseases are expected to account for 48 per cent of the in-patient revenue in 2013
- * Growing health awareness and precautionary treatments coupled with improved diagnostics are resulting in an increase in hospitalisation
- * CAGR of hospitalised cases from 2008 – 18:
 - * Cardiac – 18 per cent
 - * Oncology – 16 per cent
 - * Diabetes – 19 per cent

Number of hospitalised cases (million)



Source: Apollo Investor Presentation August 2013, Aranca Research
Note: F - Forecast



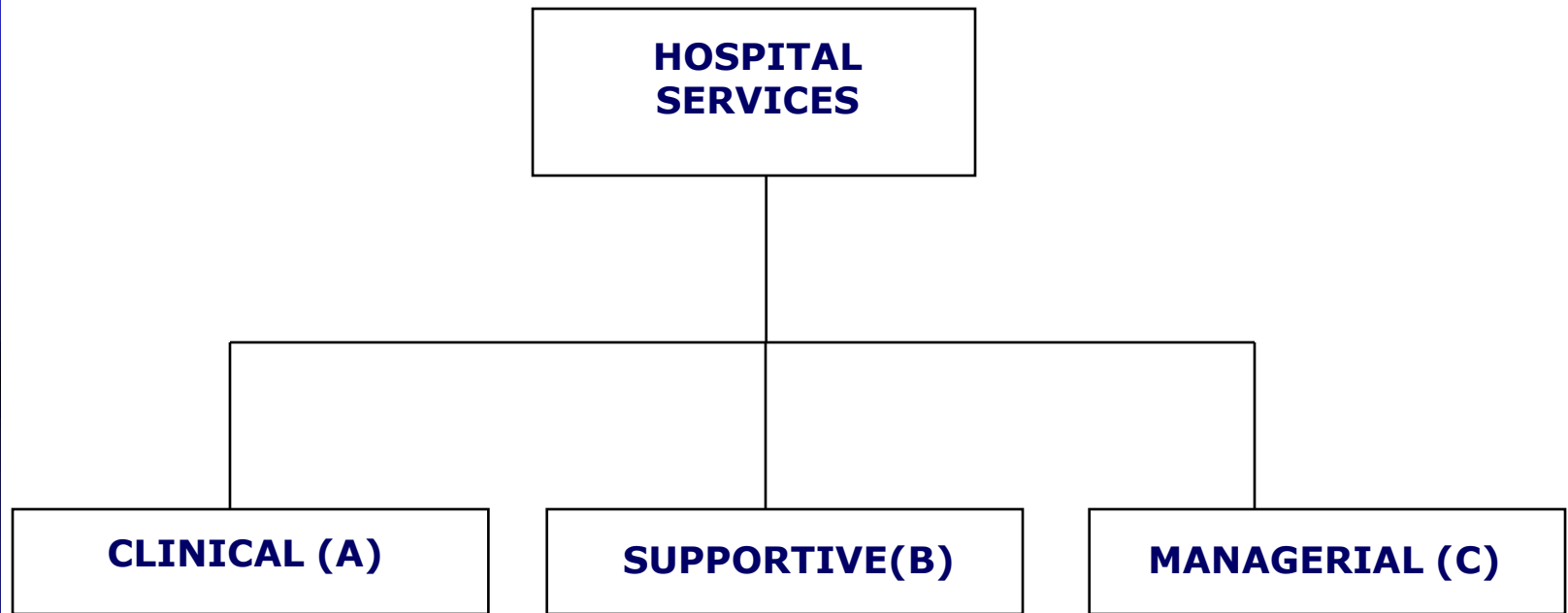
WORLDS TOP 10 BEST HOSPITALS WEBSITES

- 1 Cleveland Clinic
- 2 St Jude Children's Research Hospital
- 3 Johns Hopkins Medicine
- 4 Mayo Clinic Scottsdale AZ
- 5 University of Maryland Medical Center
- 6 M D Anderson Cancer Center
- 7 Massachusetts General Hospital
- 8 Assistance Publique Hôpitaux de Paris
- 9 Memorial Sloan Kettering Cancer Center
- 10 New York Presbyterian / Lower Manhattan Hospital

MANAGEMENT OF HOSPITAL SERVICES



HOSPITAL SERVICES



CLINCIAL



CLINCIAL

**THERAPEUTIC
(TREATMENT)**

**DIAGNOSTIC
(DIAGNOSIS)**



THERAPEUTIC (TREATMENT)

THERAPEUTIC (TREATMENT)

- IP. SERVICES
- O.P SERVICES
- AMBLUTORY CARE
- O.T SERVICES

BROAD SPECIALITIES

SURGICAL

- Gen. Surgery
- Orthopedics
- Ophthalmology
- Otto-Rhino
Laryngology(ENT)
 - O & G

MEDICAL

- Gen. Medicine
 - Pediatrics
 - Dermatology
- Respiratory Medicine
- Infections Diseases
 - Pharmacology
 - Anesthesiology

DIAGNOSTIC (DIAGNOSIS)

DIAGNOSTIC (DIAGNOSIS)

1. Pathology (Laboratory Medicine)

- Microbiology
- Biochemistry
- Histopathology
- Hemato Cytology
- Cytopathology

2. Radio-Diagnosis

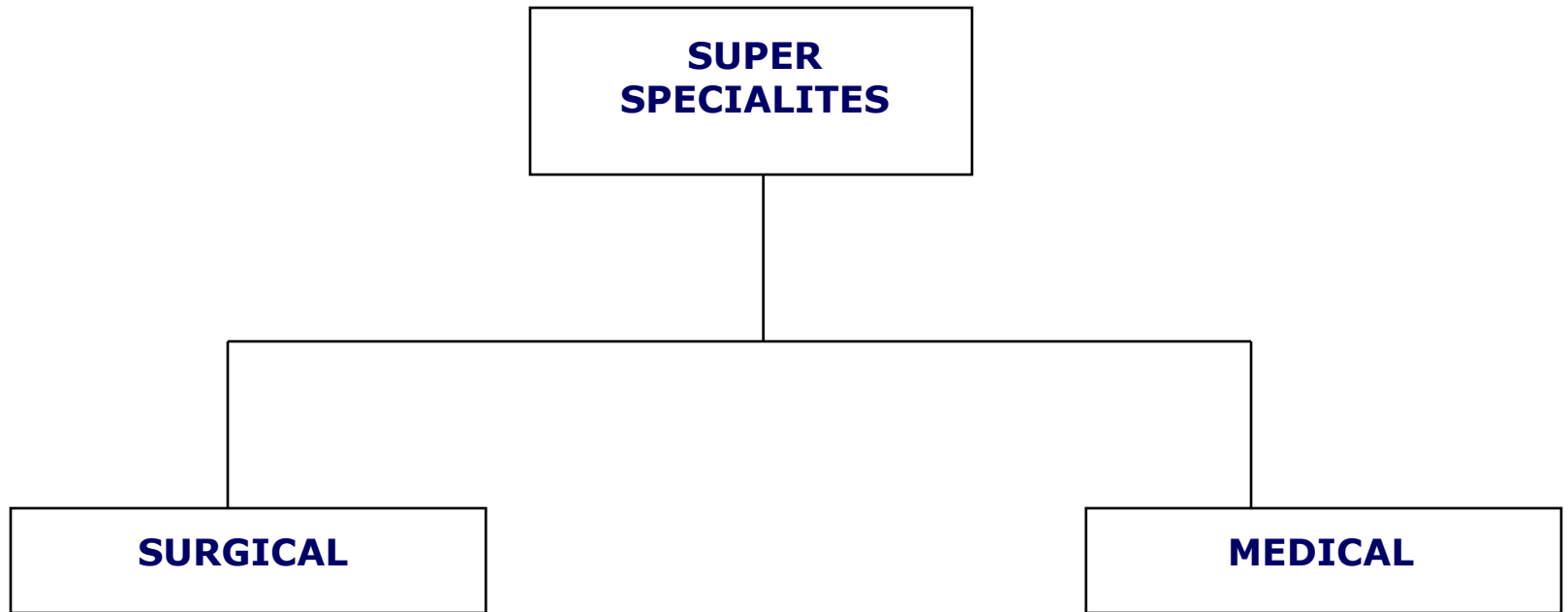
- X-Rays
- C.T
- M.R.I
- 64 slice CT Angiogram

3. Pathology (Laboratory Medicine)

- PET
- GAMMA
- CAMERA



SUPER SPECIALITES



MEDICAL

SURGICAL

- Cardiology
- Neurosurgery
- Nephrology
- Pulmonology
- Endocrinology
- Gastroenterology

SUB SPECILITIES

- Diabetology
- Hepatology
- Rheumatology



SURGICAL

SURGICAL

- Neurosurgery
 - CVTS
- Genito Urosurgery
- Plastic & Reconstructive Surgery
- Paediatric Surgery
- Vascular Surgery

SUB SPECILITIES

- Brain & Spine Surgery
- Paediatric Cardiac Surgery
 - Gynaeco urology
- Trauma care surgery
 - Proctology
 - Cryosurgery



NURSING & PARAMEDICAL SERVICES

NURSING & PARAMEDICAL SERVICES

- Nursing
- Physiotherapy
- Speech & Hearing
- Occupation Therapy
 - Dietetis
 - Pharmacy

SUPPORTIVE SERVICES (B)

SUPPORTIVE SERVICES (B)

- House keeping (Environmental Services)
- C.S.S.D
- Linen & Laundry
- Food Services
- Security Services
- Engineering Services & Maintenance

- Civil
- Electrical
- Mechanical
- HVAC
- Biomedical Engineering

- Medical Records
- Transportation Services





MANAGERIAL SERVICES (C)

MANAGERIAL SERVICES (C)

- HRM
- Hospital Operations
- Marketing & Business Development
- Patient Care Management
- Materials Management
- Quality Service Management
- Information Systems Management
- Financial Management

THE EXPECTED CONTRIBUTION OF HOSPITAL ADMINISTRATORS

Issues and Challenges of Healthcare system:

- Poor service quality in Government hospitals
- Low utilization of private hospitals
- Unaffordable services of the private and corporate groups

The role cut for a Hospital Administrator is:

- Improvement of Quality of Service in government hospitals
- Increase the bed- occupancy ratio of the corporate hospitals
- Making the private hospital services affordable to common public
- Cutting the length of stay of a patient, which benefits both patient and hospital-reduced cost and availability of bed for the next patient.





THANKYOU

PROF. MOHD. MASOOD AHMED

Email: mescomasood@gmail.com