

DISSERTATION REPORT ON

**“ A STUDY ON MARKET SURVEY FOR A
PRIVATE EYE HOSPITAL IN FATEHABAD
DISTRICT, HARYANA ”**

A dissertation submitted in partial fulfillment of requirements

For the award of

Post Graduate diploma in health and hospital management

By:

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PG/11/086



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May, 2013

COMPREHENSIVE EYE EXAMINATIONS & LATEST FACILITIES FOR

- PHACO (STICHLESS CATARACT SURGERY)
- ZYOPTIX LASIK LASER (SPECTACLE REMOVAL)
- PHAKIC IOL
- TRAUMA
- CONTACT LENSES

SUPER-SPECIALITY CLINIC FOR

- CORNEA
- RETINA
- GLAUCOMA
- SQUINT & OCULOPLASTY
- PAEDIATRIC & NEURO OPHTHALMOLOGY



EYE-Q
SUPER-SPECIALITY
EYE HOSPITALS

CERTIFICATE OF DISSERTATION COMPLETION

TO WHOM IT MAY CONCERN

This is to certify that **Dr. Sandeep Kumar**, a student of IIHMR Delhi has successfully completed his dissertation in our organization from January 23, 2013 to April 27, 2013. During this dissertation he has worked on "A study on the marketing activities of Eye-Q Hospital, Fatehabad" at Eye-Q hospital, Fatehabad.

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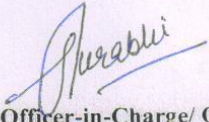
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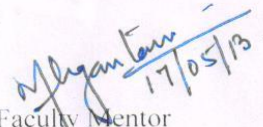
Date: 3-5-13

Place: Gurgaon

Certificate from Dissertation Advisory Committee

This is to certify that Dr. Sandeep kumar, a participant of The Post- Graduate Diploma in Health and Hospital Management has worked under our guidance and supervision. He has submitted this dissertation titled "A study on the camp activities of Eye-Q Hospital, Fatehabad district, Haryana" in partial fulfilments of the requirements for the award of the Post- Graduate Diploma in Health and Hospital Management.

This dissertation has the requisite standard and to the best of our knowledge. No part of it has been reproduced from any other dissertation, monograph, report or book.


Faculty Mentor


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Certificate of Approval

The following dissertation titled "**A STUDY ON THE CAMP ACTIVITIES OF EYE-Q HOSPITAL, FATEHABAD DISTRICT, HARYANA**" is hereby approved as a certified study in management carried out and presented in a manner satisfactory to warrant its acceptance as a prerequisite for the award of **Post- Graduate Diploma in Health and Hospital Management** for which it has been submitted. It is understood that by this approval the undersigned do not necessarily endorse or approve any statement made, opinion expressed or conclusion drawn therein but approve the dissertation only for the purpose it is submitted.

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ABSTRACT

Background: A Market survey was carried out for a private eye care service provider in the district of Fatehabad, Haryana. The catchment area of the hospital has 80% rural population and 35.5% BPL households. On the basis of the report of National programme for control of blindness, the total in Fatehabad district is 6341 annually. Out of this the total eye diseases operations done by Eye-Q Poonam eye hospital are 1930 annually. The market preference for the hospital is 29%. The objective of the study is to conduct the market survey for the hospital to determine the preferences of stakeholders for availing eye care services.

Methodology: For the market survey two study populations were considered for data collection which included survey for 1) community, opticians and pharmacists (sample size: 99) 2) camp patients who dropped out for availing hospital services (sample size 134). Pre structured questionnaire was used for random cross-sectional study for both the groups. Technique of data collection for drop-out patients from camps was telephonic interview.

Result: Findings from the market survey indicated that 41% of the respondents preferred to avail services at Civil hospital whereas 34% showed their preference for Eye-Q Poonam eye hospital. 95% of those who preferred Civil hospital gave low fee for service as a reason for their choice of service provider. Study findings also indicate that out of total camp OPD, 12% were advised to undergo eye operation for various eye ailments. Out of these, 56% availed service at the hospital, whereas the 44% were the drop-outs. About 43% of drop-outs were in below poverty line (BPL) category who either did not possess BPL cards or their cards were not updated which prevented them from availing cashless service at the hospital, 27% of drop-outs who were above poverty line could not afford to avail service at Eye-Q. Rest of the drop-outs had reasons for not availing services related to family and decision related issues. The government statistics also shows that 73% BPL families are not enrolled in the RSBY Scheme.

Conclusion: Civil hospital is a most preferred service provider in catchment area, however many eye care services are not available there. It was found that for availing the services unavailable at Civil Hospital, patients chose to travel 40 kms of distance for a private service provider. The study concluded with recommendations related to public private partnership of Eye-Q and Civil hospital for eye care services and also for streamlining services of RSBY enrollments and availability of cards besides looking into Eye-Q's pricing policy.

ACKNOWLEDGEMENT

I have taken tremendous interest and effort in the project. However, it would not have been possible without the kind support and extended hand of help of many individuals. I would like to express our sincere thanks to all of them.

Firstly i would like to thank the CEO of Eye-Q Vision Pvt. Ltd, **Mr. Rajat Goel** for granting me the opportunity to do training and project at this hospital.

Also i would like to thank **Mr. Akhil Jain**, Operation Manager, Eye-Q Poonam eye hospital Fatehabad for allowing me to do the project at Eye-Q Poonam eye hospital at Fatehabad, Haryana. I would also thank **Mr. Ranjit Tiwari**, Training officer, Eye-Q Poonam eye hospital for her kind support during the training.

I am highly indebted to **Mrs. Minakshi Gautam** for her consistent guidance and marked supervision as well as for providing necessary information regarding the project that enabled us all reach the completion of the same successfully.

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ABBREVIATIONS

1. ISO- Indian Standard Organisation
2. CMD- Chief Medical Director
3. RSBY- Rastriya Swasthya Bima Yojna
4. BPL- Below poverty line
5. NGO- Non Government organisation
6. OPD- Out Patient Department
7. APL- Above poverty Line

1. INTRODUCTION:

1.1 Organisation Profile

About EYE Q Group of hospitals

The Eye-Q Poonam eye hospital chain is committed to providing best quality eye care at affordable cost across India. We are an ISO 9001-2000 registered organization operating under the leadership of our Founder and CMD- Dr. Ajay Sharma- one of the most renowned eye surgeons in India, aided by a team of specialists with rich experience in their respective specialties from top hospitals across the country.

Presently we have Hospitals at Gurgaon (DLF & New Railway Road), Rewari, Haldwani, Rohtak, Saharanpur, Muzaffarnagar, Yamunanagar, Hissar, Roorkee, Fatehabad, Surat and Lucknow, Delhi thus making the best of eye care available to a substantial segment of the population across Haryana, Uttarakhand, Uttar Pradesh and Gujrat.

VISION

To be India's foremost chain of eye hospitals in terms of both Quality of eye care and the Number of patients handled.

MISSION

To make every patient an Ambassador for Eye-Q through a combination of highest level of quality and technology in eye care, exceptional personal care & complete integrity to the patient and his/her needs.

The study was conducted at **Eye Q Poonam Eye Hospital, Fatehabad**. The hospital is located at a key location near bus stand since 25 years. In 2011 it was acquired by Eye Q group of hospitals. It is a super speciality eye hospital offering treatments for eye ailments such as cataract, glaucoma, retinal problems, squint etc.

The screening Eye camps:

The eye camps constitute the main marketing activity of the hospital. Around 20-30% revenue of the hospital is generated through these camps. There is a separate dedicated team for these camp activities.

The process of camps:

Based on the list having the list of RSBY card holder area wise, a monthly plan is made. Locations are decided every month. During camp planning, the previous camp activity is

also kept in mind. For every week, generally the first day of the week is kept for camp setting. During camp setting, the place and date of the camp is fixed after visiting that area. On the day of the camp, the camp team reaches the venue and screens the patients. The camp team includes one optometrist, one counsellor, one assistant, one driver. The patient detected with any operable condition such as cataract, glaucoma etc are advised to undergo treatment at the earliest. Patients are given option to undergo the operation on same day also. If patient agrees, he/she is taken to hospital and operation is performed same day.

About RSBY scheme

The Hospital is empanelled with RSBY. The patients with RSBY card are given free treatment within the budget of 30000/- per year per family.

RSBY has been launched by Ministry of Labour and Employment, Government of India to provide health insurance coverage for Below Poverty Line (BPL) families. The objective of RSBY is to provide protection to BPL households from financial liabilities arising out of health shocks that involve hospitalization. Beneficiaries under RSBY are entitled to hospitalization coverage up to Rs. 30,000/- for most of the diseases that require hospitalization. Government has even fixed the package rates for the hospitals for a large number of interventions. Pre-existing conditions are covered from day one and there is no age limit. Coverage extends to five members of the family which includes the head of household, spouse and up to three dependents. Beneficiaries need to pay only Rs. 30/- as registration fee while Central and State Government pays the premium to the insurer selected by the State Government on the basis of a competitive bidding.

UNDERSTANDING THE LOCAL DEMOGRAPHIC AND COMPETITIVE LANDSCAPE OF FATEHABAD



- Population of Fatehabad city: 1, 25,000
- Population of Fatehabad district : 9,21,680
- Rural population: 80%, Urban population : 20%
- BPL population 35.5%
- Literacy: 69%
- There are 243 inhabited villages in the district

| Sub-Division | Tehsil | Sub-Tehsil | Blocks |
|--------------|-----------|------------|-----------|
| Fatehabad | Fatehabad | Bhuna | Fatehabad |
| Tohana | Tohana | Bhattu | Tohana |
| Ratia | Ratia | Jakhal | Ratia |
| | | | Bhattu |
| | | | Bhuna |
| | | | Jakhal |

The Eye care market potential in Fatehabad district and share of Eye-Q Poonam eye hospital

The population of Haryana is 2.53 crore, where as the population of Fatehabad district is 9.2 lacs. According to the National programme on control of blindness statistics 2012-13, there were 183376 total eye operations done in Haryana during 2012-13. According to proportion of population of Fatehabad in total population of Haryana, the total eye surgical cases in Fatehabad would be 6341 annually. There would be 521 eye surgical cases monthly in Fatehabad district, which is the main catchment area of the Eye-Q Poonam eye hospital in Fatehabad. Out of this, Eye-Q Poonam eye hospital in Fatehabad have around 165 cataract cases. Thus **preference for Eye-Q Poonam eye hospital in eye market of Fatehabad is 29%.**

2. LITERATURE REVIEW

A. Asim K Sil: “Outreach eye camps: a case study from West Bengal, India”

The study is based on the data of 9 years (1997-2005) of outreach eye camps from the Vivekananda Mission Ashram, West Bengal. The study shows that about 35% patients who attended the camps were advised for surgery.

The study also shows that the average dropout rate was 23% i.e. the 23% patient of those who were advised the surgery, did not underwent it. Also according to the study, the 27% of the people who came to camp were operated upon.

The attendance at the camp was gradually increasing, as is the proportion of operable cases. They try to organise camps in a particular location at a particular time of the year. This helps local people to remember the time and prepare for attending the camp, and also to save some money for the surgery. This is reflected in a higher selection of operable cases.

B. Activity report 2005: Aravind eye care system

Eye camps have been productive as a strategy for bringing in patients, and they account for 437,224 patients examined and 97,292 patients

Operated on in 2005. 22% of the people, who came to the camps, were operated upon.

C. Malhotra R, Uppal Y, Misra A, Taneja DK, Gupta VK, Ingle GK.

Increasing access to cataract surgery in a rural area--a support strategy.

The objectives of the study were to elicit the reasons for not undergoing cataract surgery from those having cataract, aged 50 years and above, in a village community and, develop, implement and assess a support strategy for getting cataract surgery done. The leading reasons identified were monetary constraints (18.8%), transport difficulty (17.4%), lack of awareness about cataract in the eyes (17.4%) and lack of escort (14.5%).

D. P K Nirmalan, J Katz, A L Robin, R Krishnadas, R Ramakrishnan, R D Thulasiraj, J Tielsch: Utilisation of eye care services in rural south India: the Aravind Comprehensive Eye Survey

Among those who reported having sought eye care service from any available eye care provider, 1073 (58.7%) sought treatment from a general hospital rather than an optometrist or ophthalmologist. The major reasons for not seeking eye care even though there was a felt need included the lack of money (78%), the lack of time to spare (70%), and the lack of an escort (58%).

3. OBJECTIVES:

1. To study the market preference for eye care services.
2. To study the drop-out rate of patients recommended surgeries during eye camps and identify the reasons for drop-outs.
3. To define the strengths, weaknesses, opportunities and challenges available for Eye-Q Poonam Eye Hospitals based upon the findings.

4. METHODOLOGY:

It is a cross sectional study based on Market survey and telephonic interview.

Study design – Descriptive and cross-sectional

Study area – Fatehabad district, Haryana

Sample size- 99(For Market survey), 134(For telephonic interview)

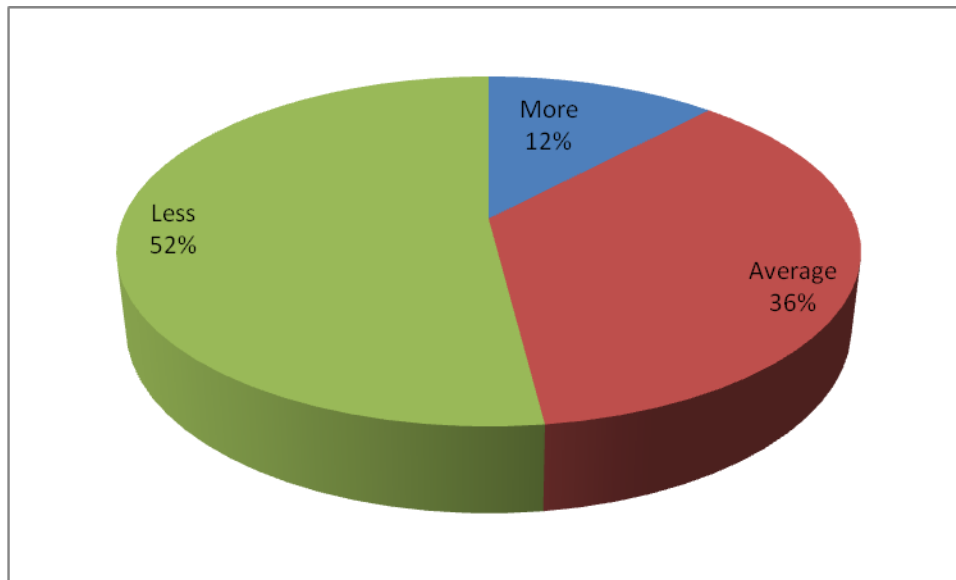
Sampling technique- Convenient sampling (For Market survey), complete enumeration (For telephonic interview)

Sample population: Covered population from primary catchment area. For market survey common man (60), Pharmacists (31) and Opticians (8) were covered. For telephonic interview camp patients were covered.

5. Data Analysis and Results:

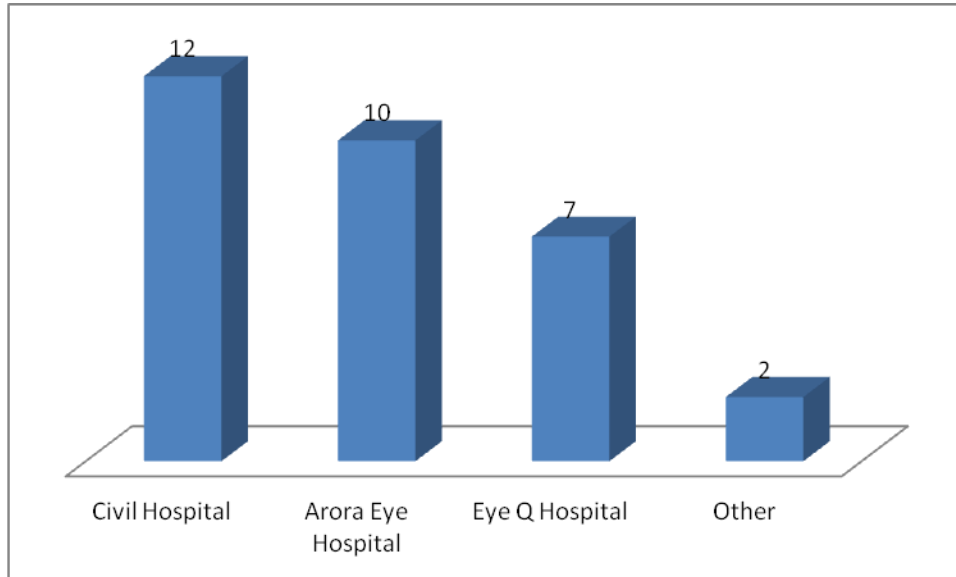
The market survey has shown the following;

Figure 1: Awareness level of the sample population regarding eye problems



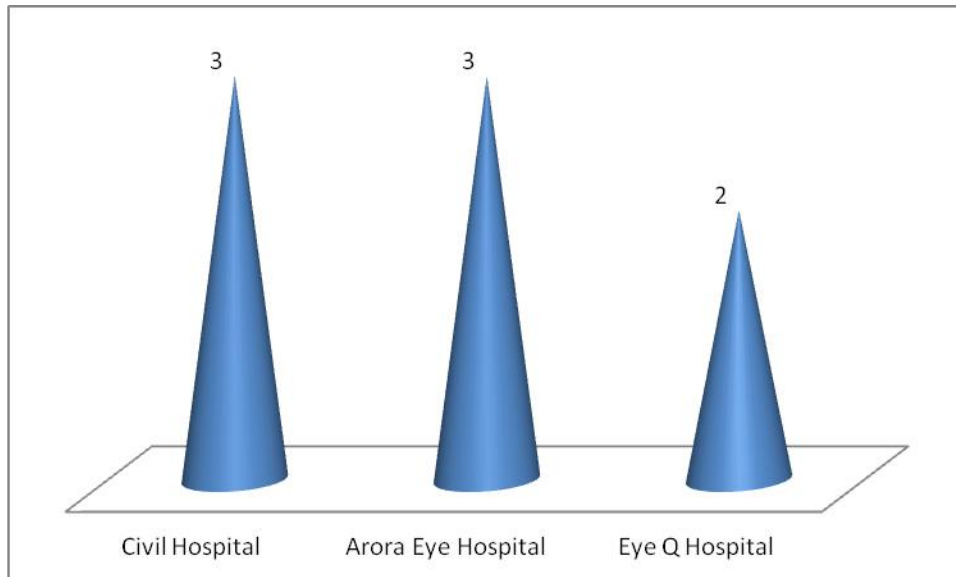
The figure shows that majority of the people have the less awareness about the eye diseases i.e. 52%. While respondents with more awareness are 12%.

Figure 2: Eye care provider preference by Pharmacists



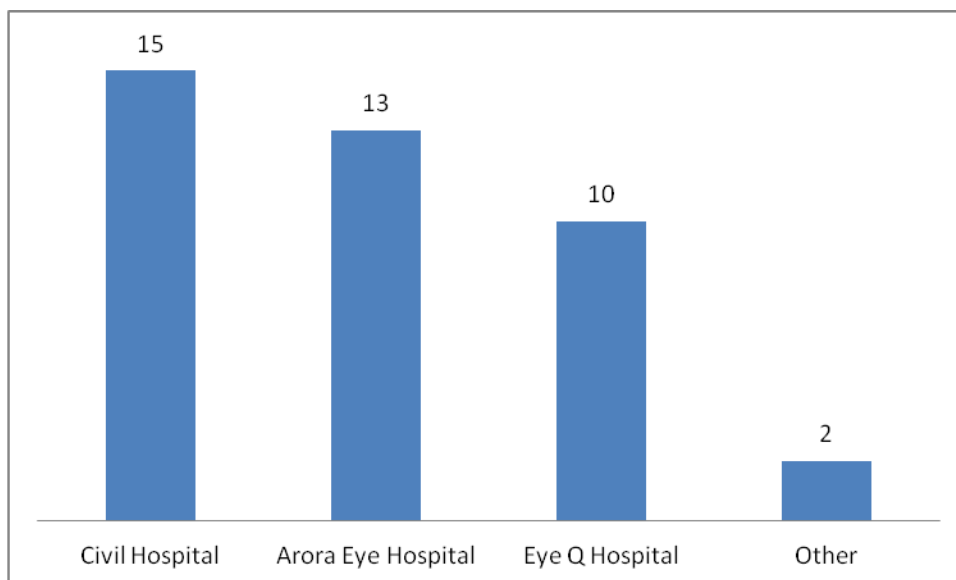
The figure shows that out of total 31 pharmacists the maximum number has shown their preference for the civil hospital i.e. 12. Ten pharmacists have shown their preference for Arora eye hospital. Eye has been on the third number with 7 pharmacists preferring Eye-Q Poonam eye hospital. It shows that the referral of Eye-Q Poonam eye hospital is less strong among the pharmacists as compared to its competitors.

Figure 3: Eye care provider preference by Opticians



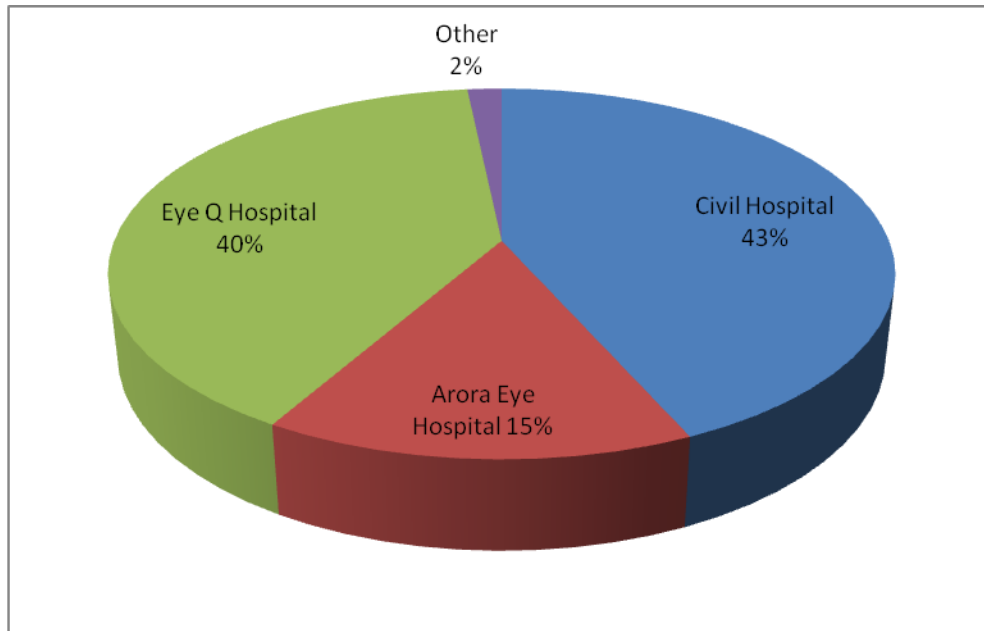
The figure shows that out of the 8 optical 3 have preferred Civil Hospital. The other 3 have preferred the Arora eye Hospital, whereas 2 have preferred the Eye-Q Poonam eye hospital. It shows that the referral of Eye-Q Poonam eye hospital is less strong among the pharmacists as compared to its competitors.

Figure 4: Eye care provider preference by all Health professionals



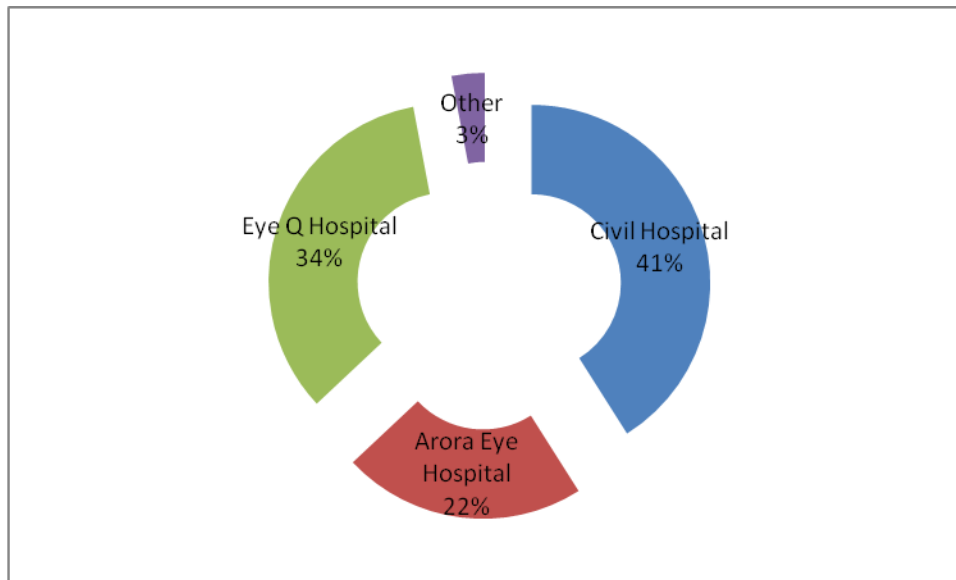
The figure shows that the majority of the health person prefers civil hospital. It shows that the referral of Eye-Q Poonam eye hospital is not strong among the health professional as compared to its competitors.

Figure 5: Eye care provider preference by Common man



The figure shows that majority of common man (43%) prefers the civil hospital. 40% people prefers going to the Eye-Q Poonam eye hospital.

Figure 6: Total market preference for eye care provider



The figure shows that among total respondents of the survey including common man, pharmacists and opticians, the Civil Hospital has the maximum market preference (41%). It is followed by Eye-Q Poonam eye hospital with 34% of the market preference. The market preference for Arora eye hospital is 22%.

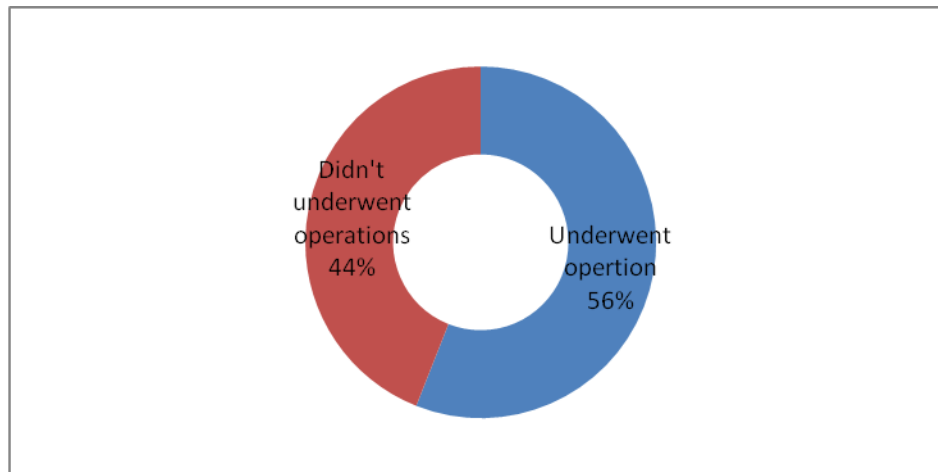
B. Camp Activity Analysis:

The camp activity is the most important marketing activity of Eye-Q Poonam eye hospital. Around 80% population of the catchment area resides in rural area. Their main occupation is agriculture. There are 35% BPL population in the catchment area. The camps in these area help in targeting the BPL patients as Eye-Q Poonam eye hospital have collaboration for the RSBY (Rastriya Swasthya Bima Yojana) scheme with government.

Table 1: Basic Facets of the camp activities

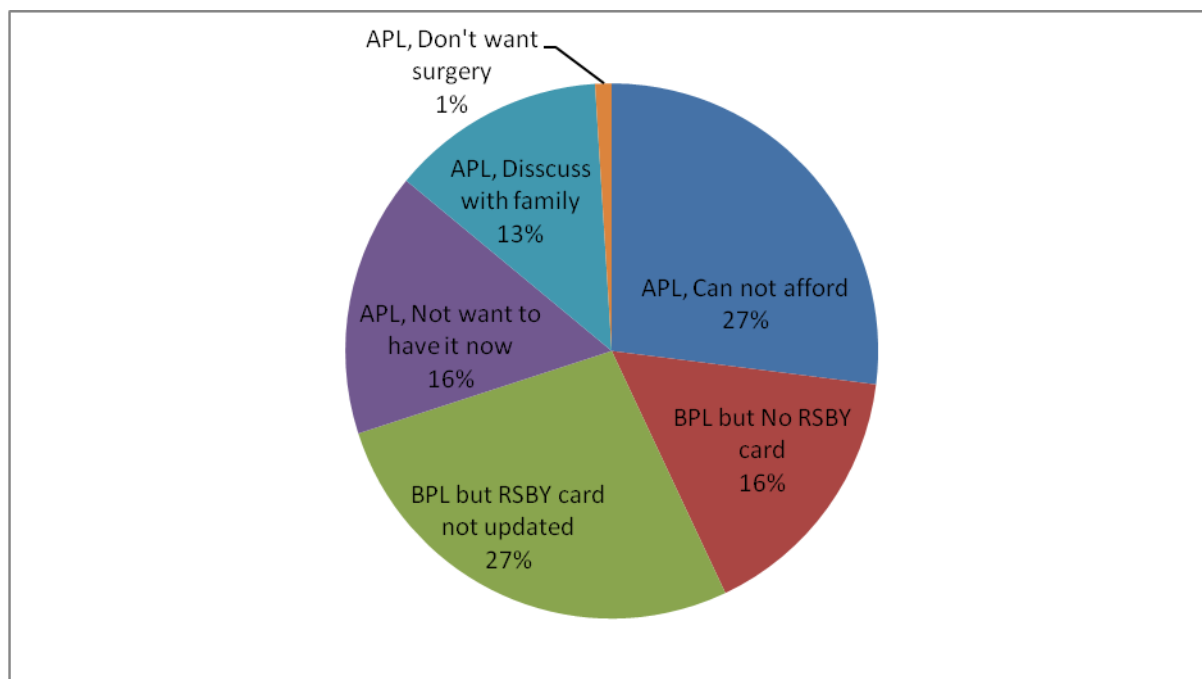
| | |
|--|-----|
| Total number of camp in one year | 316 |
| Average number of camp in one month | 26 |
| Average OPD per camp | 62 |
| Patients advised surgery per 100 eye camp patients | 12 |
| Surgeries performed per 100 camp patients | 6.5 |

Figure 7: Dropout rate among patients advised surgery in camp



The figure shows that out of people who were advised eye operations, there were 56% patients who availed the eye care services at Eye-Q Poonam eye hospital. The other 44% decided not to avail the eye care services at Eye-Q Poonam eye hospital.

Figure 8: Reason behind camp patients not availing the eye care services at Eye-Q Poonam eye hospital



The figure shows that the major reason behind Below poverty line (BPL) patients not undergoing the operation is related to issues regarding the RSBY card. The 16 % patients are in BPL category , but they don't have the RSBY card. The 27% patients have the RSBY card , but the cards are not updated. The RSBY card needs to be updated from concerned authority every year . About 43% of drop-outs were in below poverty line (BPL) category who either did not possess BPL cards or their cards were not updated which prevented them from availing cashless service at the hospital, 27% of drop-outs who were above poverty line could not afford to avail service at Eye-Q. Rest of the drop-outs had reasons for not availing services related to family and decision related issues.

Table 2: Enrolment of BPL households in RSBY scheme

| | |
|--|----------------|
| Total BPL Households | 49229 |
| BPL Households enrolled in RSBY Scheme | 13185 (27%) |
| Hospitals enrolled with RSBY scheme in Fatehabad | 20 |

Also it was observed in the statistics from RSBY scheme that the enrolment of BPL families into RSBY scheme was only 27%. There were 73% families still not enrolled.

Table 3: SWOC Analysis for Eye-Q Poonam eye hospital

| STRENGTHS | WEAKNESSES |
|---|--|
| <ul style="list-style-type: none"> • Availability of services like Glaucoma, Retina, etc • High end Equipment • Service Quality • Availability and accessibility of Services | <ul style="list-style-type: none"> • Market Approach • Follow on with camp patients • Liaison with other service providers |
| OPPORTUNITIES | Challenges |
| <ul style="list-style-type: none"> • Services provided by Govt. under BCP • Collaboration with Civil Hospital • Creating awareness for the available and accessible services of Eye Q • Partner with their suppliers, increase volume of patients and decrease cost | <ul style="list-style-type: none"> • Paying capacity of population • Unavailability of RSBY cards with beneficiary • Awareness of population • Patients referred to the facility 40 kms away |

6. RECOMMENDATIONS:

1. Even though civil hospital is the most preferred eye care provider according to our survey, there are facilities available there only for cataract surgeries. There is no facility for glaucoma and retinal surgeries. At Eye-Q Poonam eye hospital, there are facilities available not only for cataract, but also for glaucoma and retinal surgeries.

There should be a partnership with the civil hospital, that those patients for whose treatment, facilities are not available at civil hospital could be referred to Eye-Q Poonam eye hospital. The low cost treatment packages could be framed for the patient referred from civil hospital.

2. The drop-out rate in camps could be improved, if the BPL patients, who require operation, are helped out in the process of their RSBY card formation & updation. The government statistics shows that 73% BPL families are not enrolled in the RSBY Scheme. Following are the steps which could be undertaken in this direction.

- a. Liaisoning could be done with the government authorities who form and update RSBY card.
- b. Awareness could be spread regarding RSBY scheme in public in collaboration with government.

7. CONCLUSION

The market share for Eye-Q Poonam eye hospital on the basis of the report of National programme for control of blindness is 29%. However our market survey shows that the market preference for Eye-Q Poonam eye hospital in Fatehabad is 34%. The Civil hospital has 41% market preference according to our survey.

The camp data analysis and telephonic interview clearly bring out that there is scope in the improvement of the market preference further. The study brings out that 44% of the patient, who are advised operation in camps, does not go for it. The major reason for this drop out is RSBY card not updated or formed (43%). If the dropout rate of patient not undergoing the operation is increased, there would be significant improvements. For this Liaisoning could be done with the government authorities who form and update RSBY card. Also awareness could be spread regarding RSBY scheme in public in collaboration with government because government statistics clearly shows that 73% of the BPL households are not enrolled in the RSBY scheme.

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9. APPENDIX:

A. Questionnaire for market survey

Q - 1) How aware you are about the health of your eyes?

☐ More ☐ Average ☐ Less

Q - 2), Which eye doctor / hospital you know/ advice in Fatehabad, Haryana ?

.....

Q - 3) How long have you known him?

.....

Q - 4) How do you know him?

☐ Self ☐ Told by another doctor
☐ Banner / Poster ☐ Family member / friend

Q - 5) What you like about that Doctor/Hospital

☐ Experienced doctor ☐ Less fees
☐ Near to home/place of work ☐ Test machines a ☐

Q - 6) Have you heard about the Eye Q Poonam hospital in Fatehabad?

☐ Yes ☐ No

Q - 7) How did you come to know about it?

☐ Self ☐ Told by another doctor
☐ Banner / poster ☐ Family member / Friend

Q - 8) What do you like most about it?

☐ Behaviour ☐ clean hospital e ☐ experienced doctor
☐ Latest machines ☐ All

Q - 9) Your suggestion to Eye-Q Poonam eye hospital.....

