

# Hospital-to-home care programs are creating opportunities for home care setting applications for medical devices



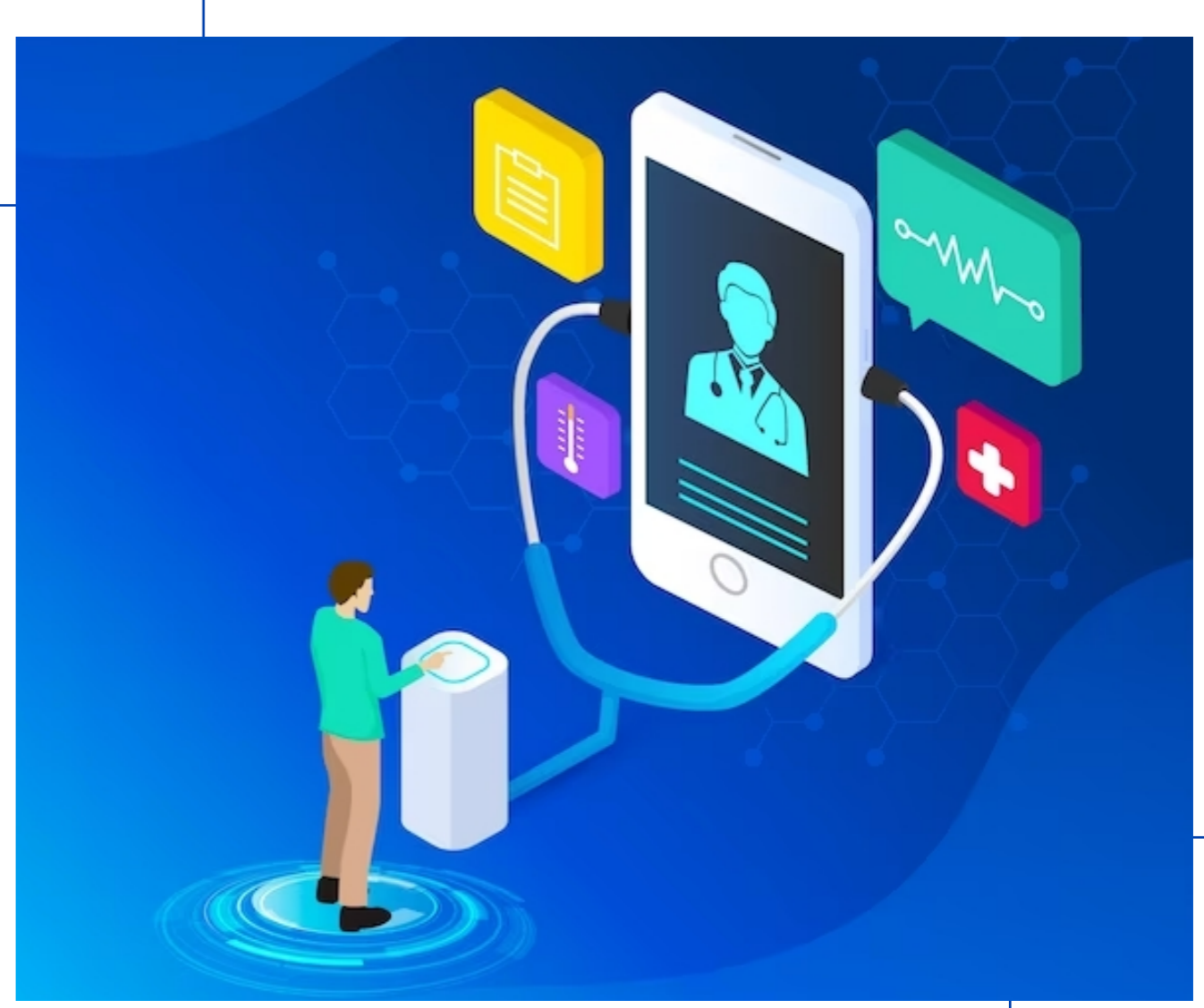
## Overview:

The healthcare industry is undergoing a transformative shift, driven by advancements in healthcare delivery for better patient outcomes coupled with cost savings, and increased patient satisfaction. The foremost driver is the desire to provide patient-centric care. Homecare allows patients to receive treatment and support in the comfort of their own homes, promoting a sense of autonomy and reducing the stress associated with hospital stays. Advances in healthcare technology, including telemedicine, remote monitoring devices, and electronic health records, have made it possible to provide high-quality care outside of healthcare settings. These technologies enable healthcare professionals to remotely track and communicate with patients. As the global population ages, there is an increasing demand and adoption of home healthcare programs offered by healthcare settings to recover from surgical procedures, manage chronic diseases, and effectively monitoring of various health parameters. The shift to homecare programs offers a multitude of benefits including cost savings associated with hospital infrastructure and staffing. The cost savings further make home healthcare more affordable being inclusive of the deployment of medical devices at the patient's home through programs effective in reducing hospital-associated infections.

The primary purpose of the homecare programs involving medical equipment or supplies available to patients at the convenience of their home is to enhance the quality of life and independence of patients by ensuring they have access to various types of medical equipment depending on their specific needs. The provision of durable medical equipment includes wheelchairs, hospital beds, walkers, and mobility aids for therapeutic benefits, alleviating impairments, or assisting with activities of daily living for patients. Medical devices adopted in the homecare program depend on the type of chronic condition, for instance, home oxygen therapy provides patients with oxygen concentrators or tanks to support respiratory conditions. Infusion therapy supplies include IV equipment, infusion pumps, and supplies needed for administering medications at home. Continuous positive airway pressure and bilevel positive airway pressure machines are prescribed for patients with sleep apnea to ensure proper airflow during sleep or enteral feeding equipment provides the necessary tools for patients who require tube feeding. The dependence on sharing vital signs with physicians remotely or through healthcare professional visits facilitates various rehabilitation programs and healthcare conditions. Orthopedic surgery, cardiac surgery, cranial surgery, and other related major surgical approaches need therapeutic care at home to recover. Similarly, managing chronic diseases such as chronic obstructive pulmonary diseases and provision of geriatric care through long-term reliance on medical devices is expected to develop patient-friendly products through improved technological features.

## Client Background:

The client represented a prominent healthcare insurance plan provider having a presence in North America and European countries. The client had complex requirements to be unraveled for understanding the reimbursement scenario related to remote monitoring of patients receiving therapeutic home care for patients suffering from musculoskeletal pain. The client team was curious to understand the recently announced reimbursement scenario announced by the regulatory agency in the U.S.



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## Challenges Faced By Client:

Infrastructure, technology, training, education, regulatory framework, policy issues, and reimbursement scenarios are some of the major factors faced by various clients in the industry. Implementing effective homecare programs requires substantial investment in infrastructure and technology. Ensuring that patients have access to necessary medical equipment and that healthcare professionals can monitor them remotely can be logistically complex. Both patients and healthcare providers need adequate training and education to adapt to this new model of care. Patients must learn to manage their conditions at home, while healthcare professionals need training in telemedicine and remote monitoring. Regulatory frameworks and policies must evolve to accommodate shifts toward homecare programs. Ensuring the privacy and security of patient data in a remote care environment, for example, is a significant concern.

The client, one of the major U.S. medical device suppliers operating in Washington, Oregon, and California was expected to expand its services to nearby states including Idaho, Arizona, and Nevada. The client faced challenges in devising a new strategy focused on understanding the acceptance of medical devices among the target population for home healthcare. The information for types of medical devices purchased for remote care adhering to treatment regimes was one of the prerequisites for the required geographic regions. A few medical devices mentioned by the client included the following products:

- Wheel chairs
- Electric beds
- Walking aids

The client approached Data Bridge Market Research to address these aforementioned complex challenges and to understand the acceptance of medical devices with the capacity to scale to other states. Data Bridge Market Research, a trusted market research consulting firm renowned for its expertise analyzed the feasibility of the project. Furthermore, the client wanted to know about the costs and reimbursement associated with the patient journey. DBMR conducted a comprehensive analysis of the adoption pattern in the mentioned regions, parameters associated with the acceptance of medical devices, and providing actionable insights to guide the client in understanding the diverse nature of the acceptance of medical devices for homecare.

## DBMR Market Research Approach to Overcome Client Challenge:

**DBMR adopted the following approach to help the client:**

**Demographic Analysis:** The composition of the population, percentage of population suffering from chronic diseases and co-morbidities, proportion of existing traumatic injuries, penetration of home healthcare plan, and other parameters such as end use of medical devices were studied

**Penetration Analysis:** The penetration of the desired medical devices was considered to check the availability of diverse types of medical devices included in the scope

**Views of Physicians:** As the research study progressed, the views and expressions of physicians were accommodated to understand the acceptance of products in the homecare settings

**Geographic Analysis:** DBMR provided extensive geographic analysis in the form of DBMR data grids. This analysis provided valuable insights into the lucrativeness of the geographic region supporting diversification. DBMR helped the client overcome challenges by analyzing the adoption of medical for home healthcare

**Need-Gap Analysis:** Collaborating closely with the stakeholders and professionals from manufacturing companies, suppliers, physicians, health insurance providers, and hospital administrators DBMR identified the demand for the medical devices and available access in the mentioned regions

## Recommendations, Implementation, and Business Impacts:

**Based on the market research findings, Data Bridge Market Research provided a set of recommendations to the client, including:**



**Expansion:** DBMR developed a comprehensive implementation roadmap, outlining the steps required to expand to nearby states. The client elaborated on the diversification associated with the opportunistic expansion to nearby regions.



**Results:** DBMR recommended client to expand by increasing the logistical reach. The collaboration with the local hospitals, clinics, and other entities was also recommended for an increase in revenue generation



**Adoption Patterns:** DBMR assisted the client in assessing the total acceptance of medical devices based on various product type, application, age group, and other parameters

## Conclusion:

Data Bridge Market Research played an important role in driving the client's decision-making process. The geographic expansion by the company to nearby regions based on the assessment of the market helped the client with increased revenue. The client updated its website to increase its digital presence in the country. The DBMR can help clients in data-driven decision processes including procurement consulting, vendor selection, positioning, pricing analysis, and other customized needs related to healthcare strategic decisions involving infrastructure, logistics, digital strategy, and associated services focused on access to products.