PERSPECTIVE

Social Media and the Indian Healthcare Industry: Opportunities and challenges

– Meera Deokuliar, Ragesh Nair

Abstract

Social Media is here to stay. Choosing to participate is not an option anymore. The challenge is no longer the ability to adopt, but the ability to sustain and ensure scalability. And while enterprises across industries are fast adopting the channel, the Indian healthcare industry is still grappling to get a foot in the door. There is a pertinent need for the healthcare industry to identify and capitalize on opportunities that the customers' affinity to this platform presents.

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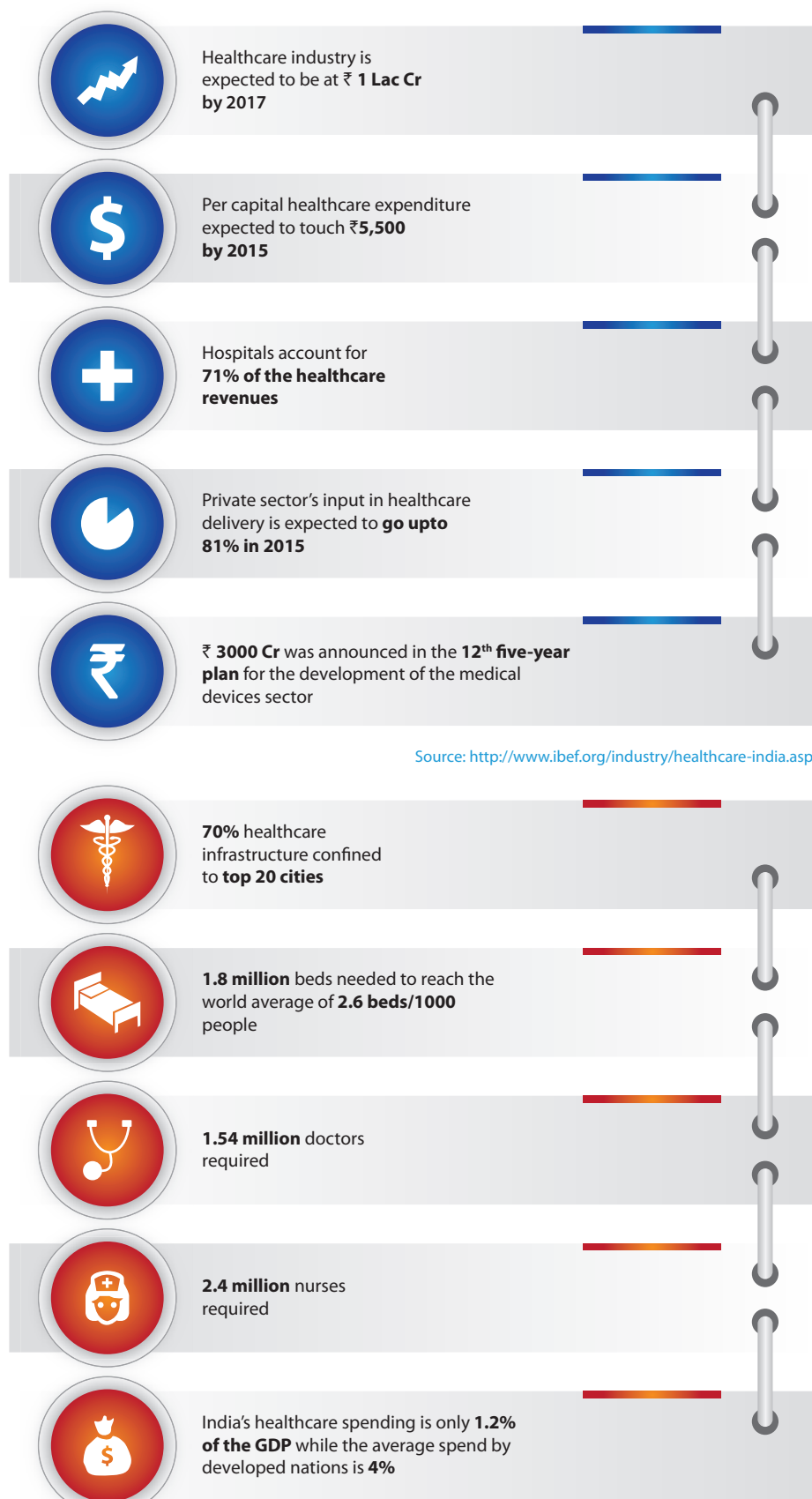
A quick 'health' check

A blooming healthcare sector is pivotal to shape any economy and is a sign of an economy built on a strong foundation of healthy and happy citizens. India has a lot to cheer about – the nation's healthcare industry has shown a robust growth rate in the past few years due to a number of factors – rise in per capita income, awareness about health risks, an ageing population, cost-effective service, growing adoption of health / medical insurance, and accessibility to better healthcare.

In fact, with healthcare figuring in the national agenda, the government has taken several steps to promote the industry. It setup the **National Health Mission (NHM)** to provide better healthcare in states with weaker healthcare infrastructure. Another step taken to improve healthcare is encouraging foreign investment by allowing **100%** foreign direct investment (FDI) in medical and health services.[1] Several other initiatives undertaken by the government in the form of new projects, reduced taxes, and infrastructure investments aim at providing the necessary impetus for the industry to grow rapidly.

The numbers below point to a healthy growth.

India advantage

India's advantage lies in its cost efficiency and its large pool of well-trained medical professionals. In addition, factors such as low cost of surgery and drug development, and the growth of clinical outsourcing (60% of the world's clinical trials are being outsourced to developing countries)[2] makes the country lucrative for investment in healthcare. And the demand is yet to be fulfilled:

Healthcare industry is expected to be at ₹ **1 Lac Cr** by 2017

Per capital healthcare expenditure expected to touch ₹**5,500** by 2015

Hospitals account for **71% of the healthcare revenues**

Private sector's input in healthcare delivery is expected to **go upto 81% in 2015**

₹ **3000 Cr** was announced in the **12th five-year plan** for the development of the medical devices sector

Source: http://www.ibef.org/industry/healthcare-india.aspx

70% healthcare infrastructure confined to **top 20 cities**

1.8 million beds needed to reach the world average of **2.6 beds/1000** people

1.54 million doctors required

2.4 million nurses required

India's healthcare spending is only **1.2% of the GDP** while the average spend by developed nations is **4%**

Source: http://health.india.com/news/pranab-mukherjee-wants-government-to-spend-more-on-healthcare/

Source:[1] http://articles.economictimes.indiatimes.com/2013-12-02/news/44657410_1_healthcare-sector-healthcare-delivery-fortis
Source:[2] http://www.slideshare.net/IBEFIndia/healthcare-august-2013

The nation presents plenty of opportunities for both domestic and foreign players. Investment inflows in hospitals, diagnostics centres and medical appliances stand at ₹10,000 Cr and ₹4,000 Cr respectively. As a result, medical tourism is booming in India and is expected to grow at 30%, annually making it a ₹12,500 Cr industry by 2015.[3]

The bigger picture is clear. The demand for affordable specialty healthcare services is growing in the country backed by several policy changes and more domestic and foreign investments.

Connecting with the 'digital' patient

While the nation's healthcare industry is poised for growth, the market conditions are changing. One of the big changes that healthcare globally is experiencing is the change in the customer's perception and view about healthcare services with the onset of the modern day digital medium. Earlier, customers relied on advertisements and word-of-mouth reviews to identify healthcare facilities and obtain speciality treatments. Today, digitally-savvy customers have information at their fingertips with easy access to peer groups and expert forums for quick reviews and information about diseases and illnesses. Customers are now open to seeking second opinions and have no qualms about changing doctors or hospitals for a better experience. Their decision to seek service from a specific healthcare facility is no longer impulsive rather; it is driven by extensive research. Not only are they 'information consumers', they are 'knowledge sharers' as well. Every customer today has the ability to influence a large group of peers within and outside their networks.
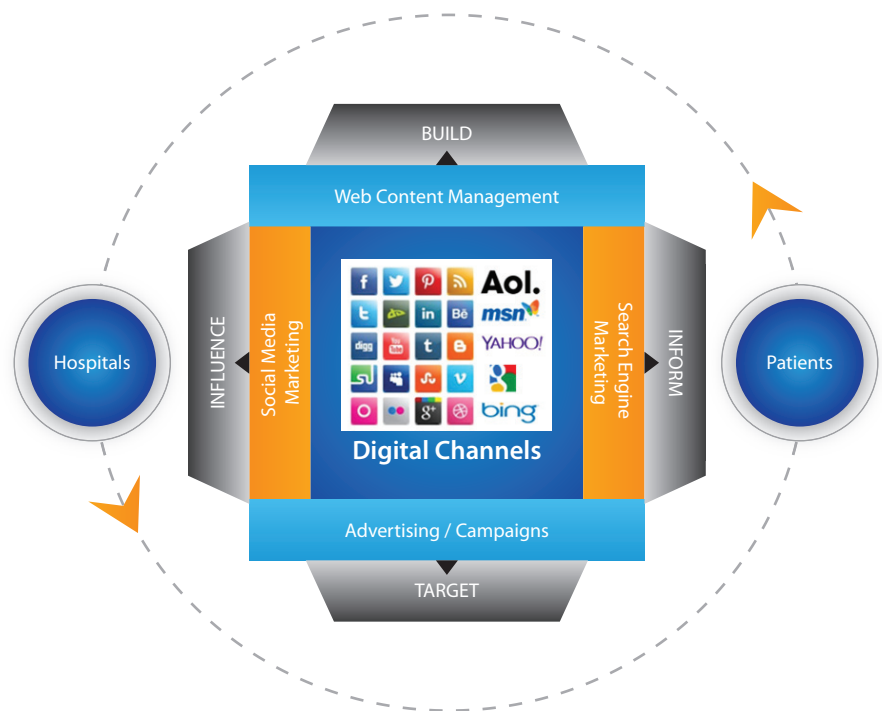
Globally, healthcare organizations are devising strategies to leverage social media to their advantage. In the Indian context, social media channels are mostly used to disseminate information. There exists a lacuna in effective response mechanism to address customer queries and grievances, with a few exceptions. Often, customer queries are met with a canned response or no response at all leading to negative sentiments about the brand. Healthcare campaigns designed around service-based social strategy, needs to be structured to address specific stages of strategy requirements during its execution.

Social media is an opportunity for marketers to connect and engage with the customers. And there are four primary digital tracks that Indian healthcare organizations can leverage to engage their customers:

Web content management (WCM): The web is where marketers should leverage quality content to entice, interest and retain customers. Creating appealing content and positioning it in germane communities and related web platforms helps build recall. In the long run, web content management allows marketers to influence customer's decision making patterns through a variety of digital channels.

Search Engine Marketing (SEM): SEM is used to ensure that products and services have high visibility and are ranked high during web searches. Good ranking creates greater visibility and awareness for the brand when customers seek information about healthcare facilities or services.

Digital ads / campaigns: Advertisements and marketing campaigns on various digital channels create awareness and help reach the target customer. This allows marketers to focus on relevant customer groups based on an understanding of the customer's specific requirements.

Social media marketing: Once the digital footprint has been established and the initial awareness has been created, the platform is set for marketers to influence customers' decision making patterns.
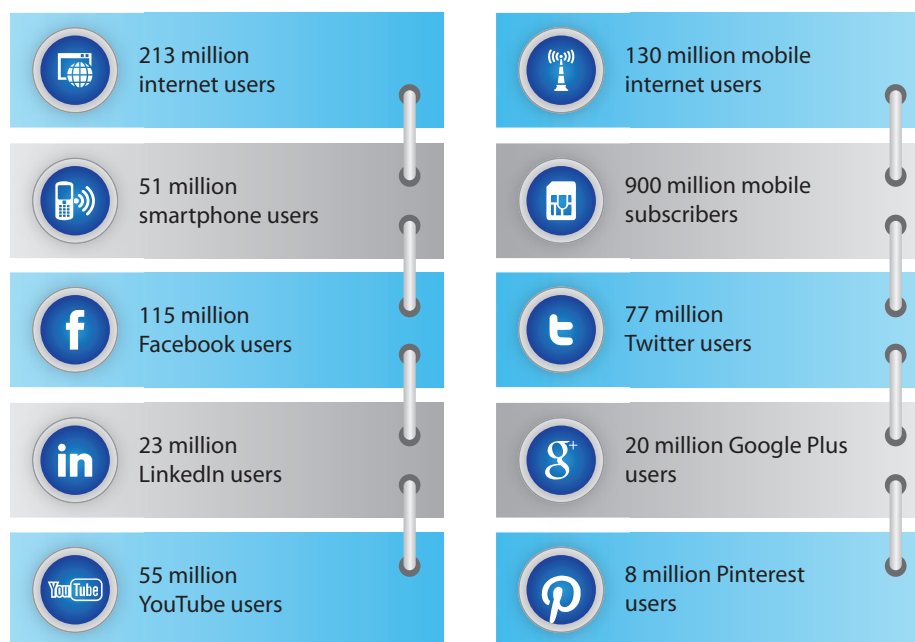
Listen, monitor, engage – an opportunity

Irrespective of the size, social media provides healthcare organizations an opportunity to engage with their customers at a more personal level - a limited capability in traditional marketing channels. Today, there are over 60 million Indians using some of the top social networks and the numbers are only expected to grow.[4]

It is therefore important for healthcare organizations to listen and monitor what is said about them on social media, derive insights from social conversations and use them to realign their existing digital strategy.
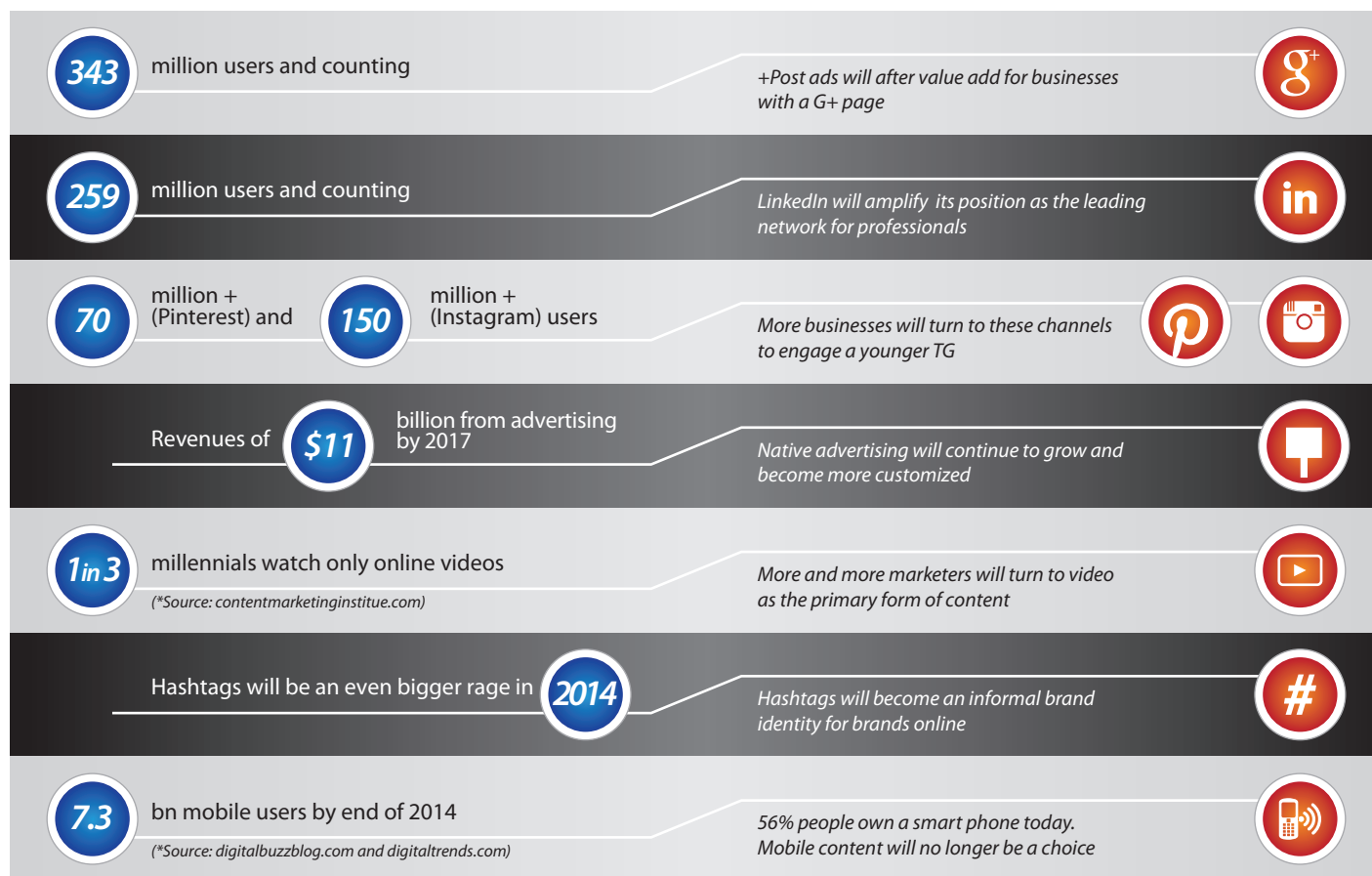
Here are six global trends that we think healthcare organizations can leverage to devise an effective social media strategy for the year.

Why is Social Media a Goldmine?

213 million internet users	130 million mobile internet users
51 million smartphone users	900 million mobile subscribers
115 million Facebook users	77 million Twitter users
23 million LinkedIn users	20 million Google Plus users
55 million YouTube users	8 million Pinterest users

Source:[4] http://www.ibtimes.co.in/articles/532632/20140102/india-mobilephone-internet-users-mobile-association-iamai.htm

Social Media Trends 2014

343 million users and counting

+Post ads will after value add for businesses with a G+ page

259 million users and counting

LinkedIn will amplify its position as the leading network for professionals

70 million + (Pinterest) and **150** million + (Instagram) users

More businesses will turn to these channels to engage a younger TG

Revenues of **$11** billion from advertising by 2017

Native advertising will continue to grow and become more customized

1 in 3 millennials watch only online videos

*(*Source: contentmarketinginstitue.com)*

More and more marketers will turn to video as the primary form of content

Hashtags will be an even bigger rage in **2014**

Hashtags will become an informal brand identity for brands online

7.3 bn mobile users by end of 2014

*(*Source: digitalbuzzblog.com and digitaltrends.com)*

56% people own a smart phone today. Mobile content will no longer be a choice

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1. **Google Plus (G+)** is gaining prominence with both customers and marketers and is expected to grow. G+ offers two significant advantages. First, it can be integrated to an existing website and content so that the Ads rank higher in search results. Second, +Post ads allows G+ content to be taken to all Google affiliate sites thereby providing access to a larger audience base.

2. **LinkedIn** has fortified its position as the strongest network for professionals and has also positioned itself as a thought leadership forum making it a B2B marketer's utopia. Brands are now redirecting their efforts from microsites / communities to LinkedIn to grow their community interactions with a targeted customer base.

3. Brands are now moving away from textual content towards **videos and images** are creating interest in platforms like Pinterest, Instagram and Tumblr. Healthcare institutions can leverage this trend to showcase their infrastructural capabilities, amongst other things.

4. Ads will no longer be enough to create the desired impression; hence native advertising has redefined how brands advertise to their customers. '**Context is the king**' and hence ads will increasingly become as contextual as possible, talking about what is being sold or communicated.

5. **Hashtags** (for example - #HealthCare) are gaining prominence as they help gain more eyeballs and create a unique identity for brands. Healthcare organizations should create unique hashtags that can be used across social networks. This will help create a more uniform digital experience for patients / customers.

6. E-Marketer expects the global smartphone users count to go up to 1.75 billion by the end of this year. More and more users today are consuming data via mobile phones compared to native desktop platforms. Hence, healthcare organizations should look at creating content tailored for the **mobile platform.**

How social fits in the patient lifecycle?

For healthcare organizations, it is important to understand how social media fits in the patient lifecycle to devise effective strategies. The stages in the patient lifecycle can be broadly classified into four phases:

Discovery: This is where the patient / customer is diagnosed with a condition / disorder or he/she is feeling ill and has researched on the illness through traditional and online sources.

Social strategies: Publish relevant content on illnesses / disorders and thought leadership posts by healthcare experts.

Consultation: Here, the customer has decided to seek medical attention and is weighing out options in terms of cost and quality. The search for hospitals / healthcare facilities that provide affordable treatment begins at this stage. Customers / patients rely on peer reviews and opinions, to help them make up their mind, even before enquiring with the hospital concerned.

Social strategies: Ensure positive reviews in forums and review sites. Negative sentiments must be addressed with contextual responses to mitigate them. Get experts / advocates to talk about the brand in social channels.

Hospitalization: The next stage is hospitalization. Admitted in a hospital / treatment facility, the patient (or the family) is now looking to corroborate his/her treatment experiences with other patients and is seeking second and third opinions from healthcare professionals.
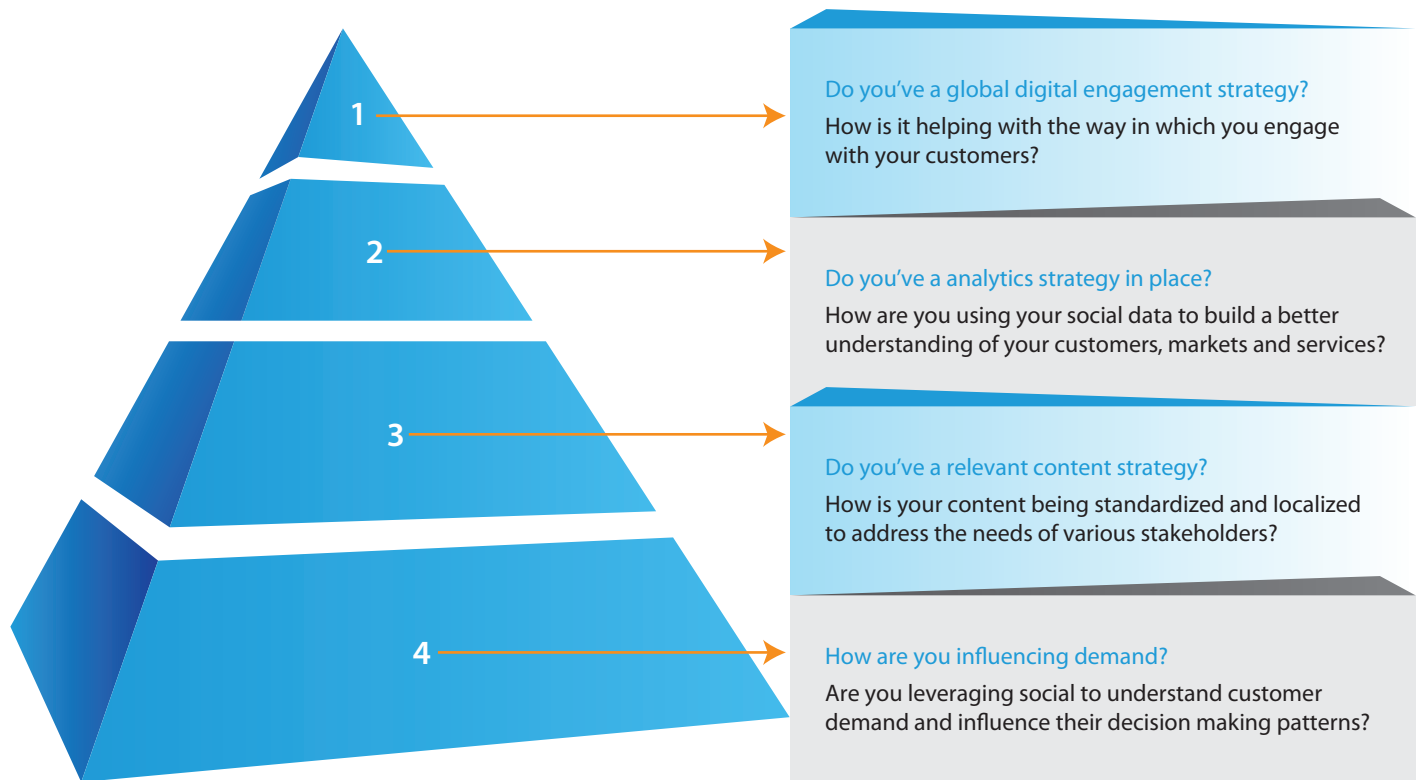
Social strategies: Listen to your customers / patients and track who they are sharing their experiences with. Take necessary measures in real-time to ensure issues, if any are resolved to the customer's satisfaction to prevent negative sentiments from spiraling. This is also an opportunity to understand how your services are perceived and use this information to correct internal shortcomings.

Outpatient: Post completion of treatment, the patient is discharged and is now armed with considerable knowledge and experience about the detection, analysis and cure for the illness / condition diagnosed. He/she is looking to share this knowledge with other patients who are seeking advice on the topic.

Social strategies: Leverage influencers for your brand and convert them into advocates, tapping into their personal networks.

Discovery

Outpatient

Consultation

Hospitalization

Opportunities and challenges

1 → **Do you've a global digital engagement strategy?**
How is it helping with the way in which you engage with your customers?

2 → **Do you've a analytics strategy in place?**
How are you using your social data to build a better understanding of your customers, markets and services?

3 → **Do you've a relevant content strategy?**
How is your content being standardized and localized to address the needs of various stakeholders?

4 → **How are you influencing demand?**
Are you leveraging social to understand customer demand and influence their decision making patterns?

The Way Forward

Clearly, for brands and marketers in the healthcare industry, the road ahead is paved with both opportunities and challenges. Healthcare institutions have taken the first step by adopting social media as a channel to communicate with customers. It is now time to move to the next phase where they strive to offer better customer service via social media and also to establish their brand as a thought leader in the space.

Our early focus on social media provided us the foresight to support our customers in a new, more digitally connected world. Our managed services model will help brands such as yours to maximize your social efficacy through effective customer engagement, reliable analytics & insights and technology capabilities so that you can focus on what's most important to you – driving your business.

About the Authors

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Meera has a total work experience of over 15 years with hands on experience in ITES & IT Services from the last 10 years including IT Delivery management and Presales, Global Program Management, Business Process Operations, Large Implementations, Process Excellence and Training. In her current role, Meera engages with potential Indian customers on strategic engagement models to enhance business value to the customer as well as driving transformational initiatives leveraging newer technologies across service lines. Meera holds an Engineering degree in Computers.

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Ragesh joined Infosys BPO in 2012, prior to which he was working with the marketing team of an ITES company and played a vital role in evangelizing social media and strengthening the brand's digital presence, through innovative initiatives and policy outlook. In his current role as an Associate Consultant for the Social Media Practice, Ragesh keeps an eye out for the changing shape and form of both, the social consumer and the enterprise. Ragesh holds a post graduate diploma in Public relations.

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