

Healthcare Marketing in India with special reference to hospitals: Challenges, Opportunities and Strategies

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Abstract

The healthcare industry has emerged as one of the most competitive industries in India. With more private hospitals in the country, the healthcare industry is growing at an accelerated rate. The healthcare market is witnessing both private as well as foreign investments as the Indian healthcare market is expected to grow by a rate of 15% in the coming 5 years. However, one of the major challenges faced by both the new and old hospital sectors is healthcare marketing. This paper tries to study the challenges faced by the hospitals in India with regards to healthcare marketing. The study is based on secondary data and literature available and also makes an attempt to identify the opportunities related to healthcare marketing in India.

Keywords: Healthcare marketing, healthcare services, quality accreditations, medical tourism

Introduction

The healthcare industry in India comprises of hospitals, medical devices, clinical trials, outsourcing, telemedicine, medical tourism, health insurance and medical equipment. The healthcare sector in India is one of the largest service sectors, with more than 4 million people engaged. The hospital services market represents one of the most lucrative segments of the Indian healthcare industry. India's healthcare industry is expected to reach \$372 billion by 2022 and has emerged as one of the fastest growing sectors. Various factors such as the increasing prevalence of diseases, improving affordability and rising penetration of health insurance continue to fuel growth in the Indian hospital industry.

The private sector has emerged as a vibrant force in India's healthcare industry. It accounts for almost 74% of the country's total healthcare expenditure. Telemedicine is a fast-emerging trend in India; major hospitals like Apollo, AIIMS, and Narayana Hrudayalaya have adopted telemedicine services and entered into several public-private partnerships (PPP). Further, the presence of world-class hospitals and skilled medical professionals has strengthened India's position as a preferred destination for medical tourism.

Objectives

1. To identify the challenges related to healthcare marketing in India from available secondary sources of information.
2. To identify the opportunities of healthcare marketing in India

3. To suggest some suitable marketing strategies for hospitals in India.

Research Methodology

This study is a form of descriptive research as it gives a description of the different challenges and opportunities of healthcare marketing in India with special reference to the hospitals. The research study is based on secondary data collected. The secondary data was collected from various published sources like books, journals, magazines, reports, publications, etc. The challenges as well as opportunities were discussed in the light of the published literature and secondary sources of information.

Review of Literature

Nassir Ul Haque *et al.* (2013) in their research paper “Health System in India: Opportunities and Challenges for enhancements” has pointed out that India spends a comparatively large share of its GDP on health but despite this, the achievements in the sector are not optimal. However the authors have also mentioned that there have been significant advances in the healthcare system in India over the last few decades. The authors have also suggested that new ways for establishing, strengthening and sustaining Private- Public Co-operation is essential to rejuvenate the entire health care system. Technology solutions and infrastructure requirements are also the need of the hour in the health care system in India.

Dharmesh Motwani *et al.* (2014) in their study “Service Marketing Mix of Indian Hospitals: A critical review” mentions that the healthcare market has become customer centred where the customer expects high quality care at reasonable and affordable prices. In the study, the author highlighted that the service marketing mix is of great importance in the hospital industry. A good service marketing mix revolves around customer satisfaction, service price transparency, convenient location of hospital services so that they are easily accessible to the patients, behaviour of the medical staff, the tangibility of hospital services and process through technology.

Nitin RV *et al.* (2016) in their paper “An empirical study on marketing mix strategies for health care services in a tertiary care hospital”. The authors try to emphasize that one of the challenging task of the hospitals is to establish a brand image in the competitive market scenario. The study does a detailed analysis of the marketing mix of a tertiary care hospital and comes up with the finding that as patient inflow proportionately affects the overall income of the hospital, hence it is important for the hospital management to emphasize on attributes like ambience, affordability, cleanliness and soft skill of the staff so that the hospital can retain the consumer/ patients from all economic backgrounds and build a better brand in the market.

R. Rajini (2016) in her study “Healthcare marketing strategy to the sustainable development of society” states that sustainable development cannot be achieved without improving the quality of life and health of a population to a satisfactory level. The health care providers are expected to be more thoughtful about their choices of strategies in managing a healthcare business. The author suggests that the healthcare organisations should chalk out appropriate promotion tools like communication programmes, endorsement of opinion leaders, direct marketing, free health camps, health fairs, immunization camps etc in order to reach out to the consumers and patients. Rita K Gupta (2018) in her research study “Industrial Analysis on Hospital Industry” tries to throw light on the key success factors which impacts the performance of the private hospitals.

The author uses competitive profile matrix for the study. In the study, it is found that medical infrastructure development, mergers and acquisitions, quality accreditations, public private partnerships, medical tourism, etc. are some of the key features which contribute to the success and better performance of a private hospital.

Challenges related to healthcare marketing in India

The healthcare consumers are the most challenging consumers to deal with as the service or the product are related to their health, curing of their disease and reducing their suffering. This makes it difficult for the healthcare providers to convince their consumers (patients) regarding their treatment and meet their expectations if there is a lack of proper communication between both the parties. The ever-changing scenario of the healthcare industry along with the well-informed patients has resulted in the demand of a value-based reimbursement structure in the healthcare industry. In this scenario, there is a requirement of a doctor-marketer collaborative approach in the healthcare system. The following are some of the challenges that the hospitals face while marketing their services:

1. Problems arising in infrastructure of health

The existing health infrastructure is not enough to serve the needs of the growing population of the country. The Economic Survey 2019-20 has released information regarding the medical infrastructure evincing a shortage of doctors in the country. As per the report, the doctor-population ratio of India is 1:1456 against the WHO recommendation of 1:1000. However, the survey also mentions that the Government has taken steps to address the shortage of doctors and in the last 5 years, the Government has sanctioned 141 new medical colleges. According to a study conducted by a private body, India will need to invest a minimum of Rs 8 lakh crore over the next 20 years to establish two million new beds. If the country needs to reach 4 beds per 1000 persons, it needs a huge fund.

The shortage of qualified manpower also remains a problem for the private hospitals and becomes a major hindrance in the marketing activities of the hospitals, healthcare sector being an expert and manpower driven industry.

2. Challenges in Rural Healthcare:

Reaching out to the rural mass is another challenge for the healthcare industry specially the hospitals- both private and public. There are various factors contributing to this problem.

There is a lack of adequate number of dispensaries in the rural areas. The ones that are there are attuned to the atmosphere of that region and may not function as they were expected to. The cost of the medicines poses as another challenge as only a few medicines are freely available in most of the rural areas. Superstitions of the local people also adds to the challenge as it becomes difficult for the health workers to carry out health awareness programmes in certain areas under the initiative of public as well as private sector hospitals.

3. Hospitals getting into Insurance Business:

Hospitals have been under immense pressure to accept flat-rate payments for care instead of reimbursements for every service. This to some extent has led the hospitals to take up the role of insurers themselves and take control of the complete patient life cycle. According to a survey conducted in 2017 among the top 100 hospital leaders, by a research firm, the Advisory Board Company, 20% of hospital networks market an insurance product and another 20% are exploring doing so. However, marketing for insurance members is different from marketing for patients; each takes a very different path of brand building, content marketing, and enhancing customer

service experiences. The core challenges will be regarding service line marketing, physician engagement, and community-based branding.

4. Digital Disruption to reputation:

Previously, patients used to take advice from friends, relatives and other referrals while choosing hospitals or healthcare services. But with the changing time, patients look out on the web to hear from a large base of patient population. A study done by Software Advice has come up with an interesting finding that 72% of patients are already using reviews as their first step in finding a doctor. 82% of the patients are using the reviews to evaluate the physicians. The disruption to reputation caused by the internet is making patients more selective and specific about their expectations. The angry and dissatisfied patients tend to be more vocal about sharing their problems and experiences on the review websites than the satisfied and happy ones. As a result, such negative reviews can be found on the web in more numbers and act as a threat for the healthcare service provider by creating a negative bias among the potential consumers. The challenge of the healthcare marketers is to help the service providers penetrate through the patients' community online to acquire the centre stage and dominate it with their presence. This will also help them to gain some competitive advantage and stay ahead of their competitors.

5. Personalized marketing

Patients seek healthcare services due to various reasons, starting from routine ailments to life threatening illnesses. It is important for the healthcare marketers to follow up on the patients throughout their lives, so that they can have a detailed access to the data of the patients who were admitted and treated in the hospitals even in the past. Creating a Patient profile system is a challenging task but is of great importance to the healthcare marketers. This will help the healthcare marketers understand the patients need and to offer products and services to the individuals at the time of their need. Although, at times, there is an abundance of data, yet personalization of service is again difficult. Marketers are able to support the patient's journey, however, due to patient confidentiality, they are unable to deliver a truly personalized individual message.

Opportunities in the healthcare sector

1. Market Size of the Healthcare Industry

The healthcare market is predicted to increase three times to Rs 8.6 trillion (US\$ 133.44 billion) by 2022. The Indian medical tourism has also been increasing at a rate of around 18% per year. There is a significant scope for enhancing healthcare services considering that the healthcare spending as a percentage of Gross Domestic Product (GDP) is rising. The government's expenditure on the health sector has grown to 1.4 % in Financial Year end 2018 from 1.2% at Financial Year end 2014.

2. Investment in the Healthcare Sector

As per data released by the Department for Promotion of Industry and Internal Trade (DPIIT), the hospital and diagnostic centres attracted Foreign Direct Investment (FDI) worth US\$ 6.625 billion between April 2000 and December 2019. Some of the recent investments in the Indian healthcare industry are as follows:

The value of merger and acquisition (M&A) deals in the hospital sector jumped by a record 155% at Rs 7,615 crores in Financial Year end 2019.

On August 2019, Microsoft India and Apollo Hospitals Group entered into an agreement to set up a National Clinical Coordination Committee for AI-powered Cardiovascular Disease Risk Score API.

In January 2019, National Company Law Tribunal (NCLT) approved Tri-County Premier Hearing Services Inc's plan to acquire Bhilai Scan and Research Pvt Ltd (BSR) Diagnostics Ltd for Rs 67 crore.

Healthcare sector in India witnessed 23 deals worth US\$ 679 million in the first half of 2018. India and Cuba have signed a Memorandum of Understanding (MoU) to increase cooperation in the areas of health and medicine, according to the Ministry of Health and Family Welfare, Government of India.

3. Launch of Healthcare schemes:

In August 2018, the Ayushman Bharat-National Health Protection Mission was approved by the Government of India as a centrally Sponsored Scheme contributed by both the central and state governments. The ratio of the contribution of the central government to the state government is 60:40 for all States, 90:10 for hilly North Eastern States and 60:40 for Union Territories with legislature. The centre will contribute 100% in the case of Union Territories without the legislature.

4. Increase in the number of skilled Manpower:

The Healthcare sector in India has become one of the largest sectors in terms of revenue and employment. As per reports published in India Brand Equity Foundation, the number of doctors reached 11, 54,686 in the year 2018 and the number of medical colleges reached 529 in Financial Year end 2019.

5. Emergence of Telemedicine:

Telemedicine is the remote diagnosis and treatment of patients by means of telecommunications technology, thereby providing substantial healthcare to low income regions. Telemedicine services in the country come under the combined jurisdiction of the Ministry of Health and Family Welfare and the Department of Information Technology. The Telemedicine division of MoHFW, GOI has set up a National Telemedicine Portal for implementing a green field project on e-health establishing a National Medical College Network (NMCN) for interlinking the Medical Colleges across the country with the purpose of e-Education and a National Rural Telemedicine Network for e-Healthcare delivery.

6. National Health Policy 2017:

The National Health Policy 2017 was formulated with an objective to improve health status through concerted policy action in all sectors and expand preventive, promotive, curative, palliative and rehabilitative services provided through the public health sector with focus on quality. The policy recognizes the pivotal importance of Sustainable Development Goals (SDGs) and plans to go with time bound quantitative goals aligned to ongoing national efforts. The policy has opened a lot of opportunities in the healthcare sector.

Suggested Marketing Strategies for hospitals in India

Since healthcare is a more consumer centric and a qualified- technical manpower driven industry, hence the hospitals needs to chalk out holistic marketing plans to reach out to their consumers

and patients through some joint collaborations among the doctors and the marketing personnel. Some of the specific marketing strategies for the hospitals in India are as suggested below:

1. Strategic Marketing Plan:

At the very beginning a strategic marketing plan must be chalked out by the hospital management. The strategic plan will have to start with a proper Research and Development regarding patient footfall, patient satisfaction and technological advancements etc. The hospital marketing team needs to set measurable goals for a limited time frame and also should go for a SWOT analysis of its marketing programmes as well as hospital services. The team should fix on its marketing budget for the year and should also carry out an in-depth competitor analysis.

2. Organizing Medical Health Check-up camps:

Organising medical health check-up camps (mostly free camps) is an important and effective marketing strategy that the hospitals can adopt. This will increase the visibility of the hospital, especially in the rural areas. The health field workers of the hospital should go on a thorough survey and understand the health problems and needs of the people of the particular area, days before the actual camp is organised. This will help the field workers to establish a trust among the people of the region. Free health camps, immunization camps should be organised by the hospitals quite frequently.

3. Quality Accreditations:

The hospitals, especially the private hospitals should go for more of quality accreditations from recognised bodies like the Quality Council of India. Accreditations like NABH, ISO and JCI are of great importance for the hospitals. These accreditations will not only help the hospital to raise its service delivery standards and processes, but also it will help the hospitals to acquire more of corporate clients on the business front. The accreditations also help the hospitals to build a positive image and reputation in the industry.

4. Organising Academic Programmes like CME and CNE:

The hospitals should organise academic programmes like Continuing Medical Education (CME) and Continuing Nursing Education (CNE) in order to create a research and academic environment in the organisation. Since the healthcare service is a highly technical manpower driven service, hence it is very important for the technical manpower like the doctors, nurses and technicians to continuously upgrade their skills. This will again create a positive image of the hospitals among the consumers. Apart from creating an academic environment, the CMEs and CNEs also help the organisation to develop their networking in the industry. Through these programmes, they can connect to and invite Resource Persons related to different specialised fields across the country and the world.

5. Internal Marketing

Apart from the conventional external marketing strategies, an internal marketing strategy is of great importance for a hospital since most of the time the front-line employees/ health workers are in contact with the patient or the patient party. The internal marketing strategy should include training programmes for the front-line employees on interacting with the patients. This would include training them on the guidelines to be followed in terms of patient safety, patient privacy, and patient interactions and also to establish a relationship of trust and respect with the patients. A proper patient feedback system should be in place and should be followed up by the floor managers/ floor supervisors at the hospital. Any untoward incident should be immediately reported to the concerned department and should be addressed within a definite timeline as stated in the hospital service policy.

6. Public Relations

The hospital should have a dedicated Public Relation Department and Public Relation Officers with the designated job profile. The PR department would work to maintain positive relationship with the media and make frequent interviews and appearances on the media in health-related programmes. The hospital should also organise community development events as a part of their PR activity. The hospitals can also adopt cause marketing strategies to aware the people about various diseases and health related issues.

Conclusion

Healthcare Marketing plays an important role in helping the healthcare professionals in creating, communicating, and providing value to the target market. Modern marketers start from the consumers rather than from products or services. It is more important to build a sustainable relationship, than to ensure a single transaction. The aim of a healthcare service provider should be to create a high level of consumer satisfaction so that they return to the same service provider whenever the need arises. From the study it is observed that there are quite some challenges while marketing healthcare services by the hospitals, but at the same time there are also some opportunities in the sector which the healthcare organisations can avail. The hospitals, with a well-planned marketing strategy can stay ahead of their competitors as well as establish a sustainable relationship with the patients through their high-quality services and everlasting reputation.

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