

PAVE THE WAVE

APAC Healthcare Communications Outlook

A special report by SPAG **FINN**
PARTNERS

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***When the trust account is
high, communication is easy,
instant, and effective***

- Stephen R. Covey

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Executive Summary

HEALTHCARE is at the cusp of maturity. Advances in data sciences, fierce competition, the shifting dynamics of the stakeholder ecosystem, the rise of outcome-based healthcare models, and the evolution of treatments— we have come a long way from when healthcare systems suffered from an asymmetry of information. Caregivers are no longer making decisions on behalf of patients, unlike before when the patients had limited access to information.

Today, healthcare information breaks through the noisy marketplace of digital platforms within minutes. The consumer is more aware than ever before and the channels of information have rapidly skyrocketed and shifted. In this post-Internet era of digital disruptors, technology acquisition costs have plunged, and information and news have become increasingly commoditized.

This has greatly enabled the democratization of knowledge. Information and knowledge are now more affordable, and accessible to millions more than a decade ago, leading to increased business complexity in healthcare.

From the investigative stories on the healthcare industry to reports on the failing faith in the pharma world, the sector was hit by many hammer blows the last few months. At the center of the arguments was one word— Trust.

Is healthcare undergoing a crisis of public trust on its hands? While there is no definitive answer, the crisis brought to fore, the need to bring healthcare communication at the center of the industry.

The consumers are devouring newer social media channels in their search for the truth. They are making quick informed decisions, and access to information is helping them understand the authenticity of a brand. Indeed, there has been a clear shift towards more informed patients willing to participate in decision-making producing greater interdependence between the patient and the caregiver.

The old definition of trust is now more qualified by the need for greater Value and Expertise— a conditional and negotiated approach that depends on communication, provisions of access to information, and the use of 'evidence' to support healthcare decisions. Healthcare communication is at an interesting inflection point. On one hand, we have the aware consumer, on the other hand, policymakers are recognizing the need for health comms at multiple levels.

Credit it to digital disruption, healthcare communicators now have countless storytelling platforms, transforming the way we tell our stories, determine success, innovate narratives and build relationships to drive an impact.

The VET Report takes a qualitative look at this new paradigm shift where Value, Expertise, and Trust together are not only fundamentally changing the state of healthcare today but more importantly recognizing the importance of healthcare communications that is steadily moving away from being a support function to becoming more and more central to business growth.

FOREWORD

Foreword



Aman Gupta

Managing Partner, Health Practice Asia, SPAG FINN Partners

IN a little over thirty years, the world has transitioned from an era when infectious diseases posed some of the biggest healthcare challenges to an era in which chronic illnesses and disabilities run rampant. The impact of this transition on our health systems is unimaginable today. They are inadequately equipped to cope even as the global healthcare community struggles to find an evidence-based mechanism to respond.

The stark lack of evidence makes it impossible for the world to establish systems that can deliver the kind of comprehensive care patients need so badly today. Yet despite a conundrum of unknown proportions facing global healthcare, there is demonstrable proof that the industry continues to move forward. The healthcare industry has always been widely recognized, and increasingly so today, across the world as one of the core- and unique when compared with other strategically important sectors crucial for development and economic wellbeing of individuals and national economies.

It is probably different because of its unique language of science, its deep science of forensics, among other things, and a stakeholder ecosystem that's complex and diverse like in no other sector. It's also different because 'trust' has always been at the heart of its value proposition for a long, long, time. However, the last 10 years has been witness to a paradigm shift, especially with the advent of new digital technology disruptors and social channels, with the focus of policymakers and civil society moving away from a volume and profits based industry model toward a 'value-based' model.

The value-based model has also transformed the traditional definition of trust- as measured by the comfort of individual patient-doctor relationships- to one defined by a model where Trust is driven more and more by value and expertise.

We live in times when evidence-based transactions are courting the needs of increasingly more informed patients now willing to participate more willingly and deeply in the healthcare decision making and treatment process.

This dynamism in the global healthcare model, especially evident in Asia, has not surprisingly significantly influenced the healthcare communications industry.

This is the generation that is experiencing the beautiful rise of digital disruptors like Artificial Intelligence, Virtual Reality, Robotics, Cloud Computing, Big Data and Predictive Analytics, among others, and their impact. It is also the most exciting time for the industry because the development of information and communication strategies is peaking and thereby helping bridge the gap between medicine and public health in a manner that facilitates large-scale healthcare interventions.

Governments and regulators are increasingly cognizant of this shift led by the rapid development of health information technology and its ability to fulfilling the promise of providing bespoke, patient-centered healthcare. Indeed, while on one hand we have the aware consumer, on the other policy makers are recognizing the need for disruptive health communications at multiple levels and on different platforms. Healthcare communicators are already using countless storytelling platforms to tell our stories in new unique ways centered on innovative narratives for sustained and impactful success.

Digital technologies and social platforms are also transforming channel strategies within the broader healthcare communications ecosystem. In many ways, communications experts are today's campaign influencers helping demystify the science behind a drug or a therapy for patients and customers alike.

This report tries to understand the profound changes currently underway in healthcare communications, especially in the Asia Pacific region, especially its maturity and integration with business strategy and the expansion of the VET (Value, Expertise and Trust) model, or the many new ways Value, Expertise and Trust are, together beginning to define the broad contours of healthcare communications for the next decade.

There are telltale signs already that the next decade will be even more exciting for industry and healthcare communicators alike compared with all that we've seen so far!

Perspective



Priyanka Bajpai

Senior Partner, SPAG FINN Partners

OVER the past few years, the global healthcare sector has been in the throes of a major transformation driven by new technology disruptions, altering policies, roles, engagement models of various stakeholders and, therefore, the ways of communications, among others.

The implications of this shift have been significant for all major stakeholders, including governments, healthcare providers, pharmaceutical and life sciences companies, MedTech companies, insurers, and above all, patients.

The healthcare sector has been beset by the universal forces of rapid digitization, aging populations worldwide, a greater prevalence of chronic diseases, and more informed and connected consumers, even as healthcare costs continue to rise.

But, as history tells us, disruption has always been the cradle for new possibilities.

This era of new possibilities is spurring key players in the healthcare ecosystem to re-evaluate their priorities and goals. For instance, healthcare regulators and payers (public and private) are aggressively seeking ways to lower the cost of treatments. These cost-saving efforts are in turn challenging drug developers to continue developing innovative new therapies at lower costs.

Indeed, healthcare stakeholders are becoming more and more innovative as they envision new business and care delivery models. Concurrently, the focus has shifted too, moving away from a system of sick care, in which we treat patients after they fall ill, to one of that supports well-being, prevention, and early intervention.

And, in all this, trust will be critical. Organizations are aware of the shift to personalized healthcare and the emphasis on trust between patients and those providing them with treatments, medicines, and medical devices.

This could be enabled by the use of effective and thought-through channels of communication.

In the last ten years, we have seen an explosion in several channels used as pathways of communication. The responsibility to craft clear messages tailored for different stakeholder audiences, including investors and communities they serve lies on healthcare communicators.

There is an expectation in equal measure that the pharmaceutical industry must become an active stakeholder in the issues and debates that impact access to healthcare and medicine today. With the advent of technology and transparency of information, it is becoming evident now that stakeholders can no longer work in silos and always work by building consensus on key issues.

The thumb rule for growth is change and how society embraces this change. For the healthcare sector, constant change has been a crucial dynamic in its evolution. The study, treatments and the ways it communicates must always mirror this.

The APAC Healthcare Communications Outlook report is an innovative examination of the factors that drive communications in the healthcare industry and an effort to showcase the increasing importance of efficient and responsible messaging delivered via the most appropriate platforms available today.

Perspective



Mark Chataway
Managing Partner, Global Health Practice,
Hyderus FINN Partners

THROUGHOUT history, knowledge about medicine has been a closely guarded treasure. Almost two thousand years ago, only a tiny few had access to the works of the legendary Chinese doctor Zhang Zhongjing but his fame was almost universal. Ours may be the first era in which, for the vast majority of people, the challenge is not getting access to knowledge but managing all the things we can know.

Health professionals have always guarded knowledge: it was a source of power, respect and work. Those who had actually read Zhang Zhongjing were guaranteed a high status in society.

So, at the beginning of the mass media age, newspapers and later broadcast outlets were expected to follow expert opinion, not create it. For the first century or so of health reporting, health journalists mostly adhered to reporting what researchers and professors chose to reveal to them. Towards the end of the last century, this started to change. Specialist journalists began to challenge how diseases were classified, diagnosed and managed and to equip patients to question whether they were getting the best care.

Nowhere was this more revolutionary than in Asia where expert writers at newspapers such as The Hindu in India tore apart papers, protocols and plans. This trajectory has led to health becoming a vital issue in political debate across Asia— from China to west Asia, doctors and politicians are more and more held to account for what they have (and have not) done.

But changes in the media market mean that fewer and fewer outlets can today afford the luxury of highly-qualified expert reporters or to give them the time to investigate and

analyse complex stories about science or health economics.

Asian news outlets are looking more and more like their European and North American counterparts: a shrinking group of elderly consumers are no longer able to sustain traditional news sources by buying copies or watching ads.

Reporters are, in any case, less powerful than they were because they and their editors no longer control the channels. Social media is full of content which, at best, is created by its users and, at worst, churned out by often-nefarious content teams shielded from our view. Last year's orchestrated campaign against polio immunisation in Pakistan shows the worst that can happen.

This new era of democratized health information has, though, the potential for enormous good. First, it can raise expectations— Asia's population is ageing faster than any in history. As it becomes routine to live to 80 or 90, older people have to think about living longer lives very differently and health is what can extend independence and fulfilment. Families will demand that governments provide the health systems that can make this a reality.

Health on social media can also remove stigma and marginalisation. If one in seven adults has type 2 diabetes, having it will become the subject of common discourse.

As women read and see their friends overcoming breast cancer, they will act early on any warning signs. As global social media matures, the faithful will find reliable and scholarly views on the will of the Divine for children to live lives free of the fear of infectious disease.

The future of health communications, its potential for good and the risks that it brings, are the subject of this report. We need to think about it.

As we move into the modern age of medicine and medical technologies, we have the opportunity to truly realize the vision of "patient-centric" or "place-based" care. However this requires a deeper understanding of patient journeys and the new ways of engagement therein. Whether it be the care providers, funding agencies, regulators, products companies, tech vendors, families, or the patients themselves, greater collaboration across the ecosystem partnerships will become the norm.

The drive for "value" will stimulate the reorganization of care and dictate the terms in which the population interacts with the health system. Getting accurate information about products and services has never been more critical, and the stakes never higher for the impact of social opinions being formed.

Perspective



Chris Hardesty
Director, KPMG Healthcare & Life Sciences

As we move into the modern age of medicine and medical technologies, we have the opportunity to truly realize the vision of “patient-centric” or “place-based” care. However this requires a deeper understanding of patient journeys and the new ways of engagement therein. Whether it be the care providers, funding agencies, regulators, products companies, tech vendors, families, or the patients themselves, greater collaboration across the ecosystem partnerships will have to become the norm.

The drive for “value” will have to stimulate the reorganization of care and to dictate the terms in which the population interacts with the health system.

“Health/care” is typically a single word yet in reality we will have to shift more emphasis to “health” instead of “care” in order to derive the socioeconomic benefit, and this entails a greater responsibility of the people in self-management and preventative behaviors. Getting accurate information about life and associated products/services has never been more critical, and the stakes never higher for the impact of social opinions being formed.

Having worked on various healthcare initiatives across many geographies (both developed and developing), I see great potential to make a difference in our generation in the Asia-Pacific.

Some of my recent work in the region has included everything from bringing novel biotechnologies to market through stakeholder education, to the use of chatbots for streamlining messaging channels between parties involved in care coordination. My experience has taught that “value is in the eye of the beholder” when it comes to healthcare services and products.

We must strive for win-win game theory across public and private stakeholders in order for safe, cost-effective, economically-viable endeavors to succeed.

This report, the first edition of many to come, seeks to explore the sentiments of the ecosystem stakeholders about healthcare communications. Such an understanding should be considered a requisite characteristic for all leaders across the public and private sectors.

Motivating teams, connecting with colleagues, working with a diverse set of stakeholders, building reputations, forming networks, creating business strategy, are just a few examples with direct correlation to the power of communications (good or bad). And, ultimately, we are all patients or careers at some point in our lives thereby being on the recipient end of such initiatives.

In my opinion communications, their effectiveness and appropriateness, are a key enabler of unlocking “health-for-all” and progressing the socioeconomic prosperity. And of utmost importance is the TRUST factor, which came through strongly in the report. Medicine is a centuries-old field that is rooted in trust.

The modern generation is doubtful of both public and private sector intentions. Let us take the lead to work together as an ecosystem, leveraging a clearer communications intention, to achieve the population health ambitions.

THE VET REPORT

Healthcare in the Asia Pacific Region Seeks a New Paradigm for Growth

THE world is keenly looking at Asia's healthcare market. Injecting the industry with much-needed impetus, India launched Ayushman Bharat, the world's largest healthcare scheme, while China extended the scope of insurance for its people, in addition to expanding provisions such as vaccinations and ante-natal care.

The Asian healthcare industry has been growing sustainably, 12% faster than the rest of the world. The rising burden of non-communicable diseases and rising incomes are offering a significant scope for growth in this market.

From the developed markets of Singapore to emerging medical hubs of Indonesia and Vietnam and others, and led by rapidly prospering economies complimented by increasingly sensitive public policy environments and its aging population, Asia is witnessing a transformation in the scope of healthcare in the region. The story doesn't end here. This is where it actually begins.

While Asia has witnessed breakneck development in the healthcare space, the sector has been held back by low healthcare public sector spending, especially in countries like Indonesia, Malaysia, Vietnam and Philippines, where the spending on health is only between 1.1% and 3.8% of their GDP. The region is an attractive market for healthcare investment but with complex dynamics.

Despite the potential of exponential growth across sectors, there are mounting challenges that many Asian economies face today.

More than half of all adults in East, Southeast and South Asia suffer from hypertension, while the region is also home to 60 percent of the world's diabetics.

Adding to the disease burden is the prevalence of NCDs, which has created a need for health tracking mechanics, wellness plans, speciality care and advances in biopharma sciences. Not to forget, the Asia Pacific region is a complex geography with cardiovascular diseases and cancers engulfing much of the region. India alone, for instance, accounts for 27% of global cervical cancer deaths, largely due to the low availability of screening.

Healthcare has gone beyond 'popping the pill'. A radical change in consumer behaviour has paved the way for newer ways of treating people. Not only have treatments changed, but the communication around treatments has also seen a dynamic shift.

COMMUNICATIONS THAT MATTER STAYING AHEAD OF THE CURVE

AUDIENCE OF THE FUTURE

- Patients
- Healthcare Professionals
- Future Workforce

COMMS IMPERATIVES OF THE FUTURE

- Healthcare Sector Expertise
- Agility
- Adaptability
- Science-led Storytelling
- Humanizing Comms
- Knowledge Of Stakeholders

ROLE OF CULTURE IN THE FUTURE

- Global Stories with Local Perspectives
- Deep Understanding of the Local Policy Environment
- Grasp on the Local Language

Future-Proofing Health Comms With VET

LET'S consider some estimates. Asia accounts for about 40% of the planet's population, 55% of its disease burden and, yet, it only accounts for 20% of global healthcare expenditure. By 2030, Asian healthcare spend is expected to be US\$ 4.3 trillion.

As usual, the numbers tell only half the story. With an increasingly ageing population, expanding middle class, rapid urbanization and higher disposable incomes, the Asian healthcare industry finds itself in a dynamic mix of growth and complexity. The industry is diverse and complex: in some markets and sub-segments it is highly specialized, in some others it is not. There are pockets of excellence, such as India's pharmaceutical industry or the robust medical hubs of Indonesia and Malaysia.

Digital technology is increasingly becoming the central gateway to the lives of millions of Asians, enabling access to information and care like never before in history. This has helped hasten the move to reboot trust and generate greater patient's goodwill, placing the lens on a patient-centric, 'value-based' engagement model. This is particularly relevant today than ever before because it comes at a time when the healthcare industry in the Asia

Pacific region has been moving from an obsession with profits to focus on maximizing value for patients. More and more patients are today willing to participate in decision-making to spur greater inter-dependence between patients and caregivers. The old definition of trust is now more qualified, conditional and negotiated and depends provisions of access to information and the use of 'evidence' to support healthcare decisions.

This shift was also led by the emergence of purpose-built patient engagement platforms- with mostly a technology backbone- that not only just helped bridge gaps in healthcare service delivery transparency and efficiency but also spurred a need for greater collaboration and knowledge. Healthcare communications professionals are helping develop more engaging and clear communications steeped in deep domain expertise to help deliver greater value for patients who are much better informed today.

We believe the VET model (Value, Expertise and Trust) has the potential to become the force-multiplier of sustained growth for the healthcare industry in the Asia Pacific region while also offering a well-defined direction for the future of healthcare communications.

The VET Model: A Purpose-Driven Future

Model	Patients	HCPs	Policymakers
Value	<ul style="list-style-type: none"> • Transparency • Quality Care • Access 	<ul style="list-style-type: none"> • Enabling knowledge sharing, collaborations & partnerships 	<ul style="list-style-type: none"> • Access • Collaboration & partnerships • Focus on value-based healthcare
Expertise	<ul style="list-style-type: none"> • Knowledge • Collaboration • Technology 	<ul style="list-style-type: none"> • Focus on science & discovery • Therapy leadership • Tech-enabled communications 	<ul style="list-style-type: none"> • Science, discovery & innovation • Therapy leadership
Trust	<ul style="list-style-type: none"> • Tradition • Safety • Confidence • Value • Expertise 	<ul style="list-style-type: none"> • Science, discovery & innovation • Collaboration & partnerships • Shared values to drive meaningful outcomes 	<ul style="list-style-type: none"> • Value-based models • Leadership • Clarity in 'Vision & Mission'

Breaking Through The Noise

Emerging Trends That Will Define the Next Decade for Healthcare Communications

IN the first decade of this century, American author and lecturer Robert Frenay spoke about the coming age of systems and machines in his wide-ranging, future-gazing, book, 'Pulse: The Coming Age of Systems and Machines Inspired by Living Things'. Writing that mankind was at the cusp of transformative change, a time where all systems were in constant interaction and interconnected, and machines and human systems were like living organisms. He describes computers with emotions, ships that swim like fish, farms that grow like meadows, and soft jets that flex and twist like swooping birds!

That future that Frenay dreamed about is already here and no longer just the stuff of research labs and Hollywood sci-fi flicks! Today, new technologies and digital disruptors are forever altering the way we work, live and play. Nowhere is this dynamic more apparent than in industry and business, especially in a core area such as healthcare—influencing healthcare science, systems, institutions, doctors, patients, and business and engagement models in unimaginable new ways.

Indeed, while much of the change began even before Frenay wrote his book, we are today living in times when technology is the central gateway to our lives. Our workout equipment is today connected to the cloud, while trainers are powered by artificial intelligence and data-collecting sensors changing the rules of the game. Artificial Intelligence fueled Alexa and Siri are telling us what to listen to and answering mundane questions about life in general!

This disruption has also triggered the need for smarter communication tools. Healthcare communication, for instance, is at an inflection point where, on one hand, we have the aware consumer, on the other, we have policy makers and regulators recognizing the need for health communications at multiple levels as a crucial facet of business growth and industry maturity. Blame it on digital disruption, healthcare communicators today are able to employ a myriad new ways to tell their stories on multiple story-telling platforms, which are together transforming the way we tell our stories, determine success, write innovative creative narratives and build relationships to sustainable outcomes. India's healthcare industry has seen a dramatic shift, especially now, with India becoming home to the world's largest healthcare scheme. For a country with 1.3 billion people, India has not only been polio-free since 2014, but also tetanus-free since 2015. The next decade will set bigger targets like the tuberculosis (TB), malaria and many other.

Healthcare systems around Asia are also reevaluating healthcare coverage and access, taking greater interest in the value they get for the outlay of public money. In Japan, for example, the government has pledged to tie pricing and reimbursement more closely to outcomes, while in China,

the government is leading a major push from acute care towards prevention. In many other economies in the Asia Pacific region, there is a greater urgency regarding health socio-economic research as well as about investing in knowledge and collaboration to tailor global best practices to local cultural nuances and market requirements.

Much of this is of course underway much faster than ever before in history because of rapid digitization, which is accelerating the move towards data access and transparency at scale, often the key to strengthening the industry's ability to aggregate and analyze healthcare data and plug the huge gap in evidence.

Digitization is spurring the move towards data access and transparency at scale, the key to boosting industry's ability to aggregate and analyze healthcare data to plug the huge evidence gap

Once this happens, transformation could be rapid. Indeed, the industry is cognizant about the need to invest in generating evidence that can demonstrate the value of products and services for patients, providers and healthcare systems. While governments around the region, including India, are taking these challenges seriously, the need for public relations in healthcare has also grown significantly. As healthcare evolves with new therapies improving patient outcomes, as medical advances pick up pace and policy changes impact millions, effective communication strategies continue to move to the center of the industry.

Advances in technologies and the emergence of digital and social platforms have made healthcare not just treatable but also manageable. The role healthcare communicators play within this changing paradigm will them to move from just being strategic partners to becoming drivers of sustainable business. The communications function can now make its great leap forward by transitioning from being a channel for storytelling to getting under the skin of the stories they wish to tell, becoming active partners with industry to deliver service-centric mass campaigns.

Unlocking the Future of Healthcare Comms



Businesses in the future will increasingly seek to present a human face to their communications strategies and stories and how these messages are delivered and perceived will be the difference between the winners and losers. Moving beyond the current focus on day-to-day projects, the future of consumer engagement will depend on how well we can integrate communications channels to cater to evolving patient needs.

There will be an equally big focus on adding strategic value to the client's business goals consistently. While traditional PR strategies are here to stay, businesses will increasingly favor counselors who can provide audience insights, deep sector experience, and are able to negotiate a highly regulated environment without costing the brand its sheen.

Let us take a look at some key trends that will define the priorities for healthcare professionals and agencies in the future and also help them stay on top of their game and ahead of the curve.

#1

Think Global. Act Local.

The world of communication is a paradox. We live in times when you are a just a right click away from sharing a message with the world. However, it is still not a unified medium. Why? It is because even as the world has shrunk to a global village with strong media channels helping us cut through the boundaries of time, language, and location, we are still different in how we perceive these messages locally. This is more apparent in healthcare where while the reach of a therapy could be global in its use and impact, it could mean different things in different continents or markets. Communication challenges are not local. They are global. The idea is to tell stories that compel change, create campaigns that make an impact, strengthen brands that speak to the public— around the world. The goal in marketing global brands is to seek the highest common denominator in a language that resonates with the end consumer, irrespective of the geography or culture.

With our world running from a mobile application, can traditional region-specific PR strategies deliver communication strategies of the future? The answer is a no-brainer. As a strategic partner to the healthcare industry, healthcare communications will be expected to stop labelling “language” and “culture” as barriers. These are the twin facets that must be “glocalized”, weaving global practices with local nuances, innuendos, values, and allow a global service find resonance in a remote neighborhood. Taking the example of India, we have with us a most unique opportunity of using our culture and diversity to our advantage. The vernacular medium is the key when it comes to communicating at the last mile. This diversity provides firms an opportunity to tailor their key messages across regional markets much more effectively.

Cultural understanding helps sharpen ideas and the means to execute, helping teams negotiate potential roadblocks and/or misunderstandings, bring resonance and enhance trust. The power of which cannot be undermined

- Rimmi

As we all know, one size doesn't fit all. The political, regulatory, technological environment differs from market to market. These, on top of cultural and language differences would mean that localization is critical

- Grace Chiang

#2 LinkedIn, Healthcare Communications on Steroids!

If you thought LinkedIn was only a network for professionals trawling the platform for jobs and a place to share their professional achievements, you couldn't be more wrong! Dig a little more and we will see how LinkedIn is influencing the healthcare industry. According to a LinkedIn Marketing Solutions blog, “Over the past several years, the number of healthcare professionals on LinkedIn and their use of the platform grew at an increasing rate. At the end of 2013, there were over 4.4 million healthcare practitioners, executives, channel followers, and opinion leaders on LinkedIn, a 30% increase in the last year alone.” The healthcare industry is finally learning how to leverage the platform, recognising it as a network full of relevant knowledge, of quality talent, and a credible resource of cutting-edge information.

With the future of communications relying not only in providing accurate information to the patients, but also meandering through the stringent policy environments, platforms like LinkedIn are emerging as a strong resource center for knowledge, expertise and an unmatched pool of new ideas and fresh thinking. As someone said, knowledge is the key for future growth!

Online channels i.e LinkedIn & Facebook allow cross- geographical sharing from a corporate messaging perspective

- Neethiya

#3 Understanding the Local Policy Environment

HEALTHCARE still remains one of the most regulated sectors. The challenge is to craft impactful stories without disturbing the legal temperament. It requires years of knowledge, research and sensitiveness about changes in policy environments. That said, healthcare communications need to maintain a balance between content that is accurate and rich in line with a client's business goals with a focus that is able to encapsulate the latest market trends, political economy, technology, the desires of key audiences.

Healthcare communicators are expected to sift carefully through changing policy, finding a common ground for HCPs, industry, stakeholders and the patients. Healthcare is often described as a complex business with an uncertain future.

The focus is shifting from treatment-led care to accessibility and affordability. Patients are changing. So is the policy environment. Healthcare communication professionals sit right at the centre of this radical change, filtering messages to continually educate themselves and their colleagues.

For those of us working in disease awareness and elimination campaigns, a comprehensive monitoring and evaluation is being set not just for communications, but those indicators linked to policy advocacy and social mobilization. We measure success by setting SMART objectives, including putting in place “Indicators” that we could monitor along the way

- Janice

#4 Integrated Communications

In the years to come, integrated communications will dovetail into clinical practices and management, with the capability to consistently engage and address multiple stakeholders. The agency of the imminent future will be one with an institutionalized mechanism to respond and has already future-proofed itself with these skills.

Naturally, a high degree of practice specialization (much greater than at present), dexterity with diverse tools, research and cohort understanding will be other assets. While companies are still wondering how to measure a campaign's success using matrix and data analytics, the real success is in implementing integrated solutions wherein agencies offer public affairs and media advocacy as a boutique solution.

Integrated and multi-channel communication campaigns are already increasingly becoming the norm when it comes to healthcare campaigns. In Singapore, with an ever-shrinking pool of media outlets and even smaller number of healthcare writers, owned channels will become a key platform for companies to develop and house content to reach audiences

- Laura Faulkner

'Omni channel' customer experience across all channels that is seamless and integrated has been the trend. Since customer journey has multiple touch points, such an experience can help forecast and plan better. We must know that any chronic condition search journey takes a long time to culminate in a purchase or action.

Therefore, it is prudent for brands to be accessible

- Sushmita Bandopadhyay

#5 Rise of the ePatient

DIGITAL has changed the way we perceive information. The trend is fuelled by the enthusiasm for searching for medical information online. From a slight ache or pain, to a rash, people are increasingly relying on Google before consulting their doctor.

Search engines have become tools of self-diagnosis. Statistics have also revealed that four out of every five internet user looks online for medical information. This digital wave without a doubt is taking the health industry by storm.

What has changed? The speed and tolerance for what the world is willing to wait for. For healthcare communications to ride the digital wave successfully, communicators will need to keep themselves updated with both new digital tools and how to optimally leverage them.

As new technological innovations like virtual assistants based on artificial intelligence enter the healthcare arena, consolidating data to make patient interactions happen is more effective than ever before. We are already seeing how Augmented Reality and Virtual Reality are transforming the world of healthcare. An important trend that has emerged is that of the "ePatient".

AR- from employee engagement to potential employees, a chatbot will be your first interaction with the company. We need right algorithms and the right information to make chatbots more efficient.

VR- media-rich content, a more realistic image of our messaging is required

- Raymond

All digital and social media channels, all efforts can be measured in quantifiable terms. You can adjust your strategy and tactic based on the performance of past activation, and this could be executed very quickly. Gone are the days where perception audit or campaign effectiveness can only be run/tracked via surveys

- Grace

VOICES

Voices



Magline Rufina
Head— Communications, Roche Diagnostics India

Bespoke models tailored to the needs of individual brands, issues, audiences and campaigns will define and direct the future of healthcare communication. In an era where patients and customers alike are more empowered than ever before by increasingly easy access to information and knowledge, the key here for healthcare communications agencies to succeed in the future will be how quickly and consistently they are able to move up the maturity curve. Their ability to process and filter vast amounts of information to craft messages that matter for the many audiences of their clients will separate the boys from the men! As I said earlier, communication strategies must align with the needs of patients, always with an eye on specific audiences, often using tools that are interactive such as, for example, digital media. The healthcare sector is constantly changing and we are expecting the entry of VR (Virtual Reality) and Chatbots to play a defining role in the communication strategies of the future.

An important point to note here is that technology can never replace human intervention, but as we head toward a future where digital technologies could become the central gateway to our lives, a human-digital integrated or hybrid model could soon become the reality. Within all this, the traditional principle of trust as the key to all successful engagements in the healthcare industry and communications is in the throes of a paradigm shift, one that is driven by the need for deep expertise (specialist knowledge) and greater value. Today, therefore, **Value, Expertise & Trust**, or **VET** as we call it, is together a part of the same continuum that is fast emerging as the force-multiplier for future growth. In India, for instance, the duty of a healthcare communicator's job is multilayered- a communicator is expected to influence the policymakers and yet retain the local insights for the narrative to find resonance among the target audience. Indeed, this is where the need to invest in delivering capabilities of greater value, deeper expertise and longer-term trust becomes crucial.



Sushmita Bandopadhyay
Communications Leader, BD, India/South Asia

Credible and authentic storytelling is vital in healthcare because the patient is at the center of all that we do. Both internal and external communication messaging must converge to establish authenticity. There is also a need to build a shared language for the brand to offer a uniform brand experience.

As Maya Angelou once said,
“People rarely remember what you say, but they always remember how you made them feel.”

Skills and behaviors that one must possess are agility to respond in a VUCA (Volatility, uncertainty, complexity and ambiguity) world, negotiation competencies to make constructive contribution to policy discussions relevant to the organization and the communities in which it operates, how well we are able to identify opportunities to leverage policies that position the organization's leadership, generate insights and implications for action, collaborating with stakeholders to build consensus on issues such as national health priorities and finally driving positive outcomes across audiences by engaging them through new and engaging channels essential to the success of a modern business. New capabilities, new points of call, new opportunities offer fresh challenges every day in an increasingly complex healthcare landscape and we must embrace these challenges inspired by our role as catalysts in the broader healthcare ecosystem.

In this endeavor the key will be our ability to deliver better Value, Expertise and Trust in the longer term.

Voices



Grace Chiang
Deputy Director, Communications, SG Innovate


Businesses have historically always depended on content for their storytelling, but the future of healthcare communications appears to be moving towards an era where context-rich, audience-centric content will change the terms of engagement.

Media consumption is rapidly morphing into a barrage of online and social media types woven throughout nearly every waking moment of our lives. Frequent publishing is becoming pervasive as a vibrant social media is supplanting traditional publications and professional journalists. Bloggers and other digital content creators are blurring traditional lines. Influence is being democratized.

As attention spans shrink further, there is a need to present content in simpler, more visual forms of storytelling, where content in its simplistic form is passé and context is the key because it then allows marketers and communicators to not only advocate a brand's perspective, but context also helps foster trust between various stakeholders and patients. Content, thus, can no longer cater to only the science of a drug or a device. Instead, it will transition from working in isolation to integrating various channels to deliver the right message to the end consumer or the patient. We are hopeful that in the future, healthcare communications will demonstrate how content will place the lens on a context-centric model with Value, Expertise and Trust sitting at its center.

Communications agencies with years of Expertise behind them will increasingly be expected to tap the latest developments in industry and provide accurate counsel for their consumers. This, in turn, will reinvigorate Trust between patient groups and the industry. Healthcare communications will have to focus on localization of campaigns, where awareness about local political, regulatory and technological issues, for example, will crucially shape their strategies in a specific market.

Communications will therefore favor bespoke customer experiences and discard the eternally flawed principle of one-size-fits-all to the dustbin of history. One of the key drivers in this change will be the integration of owned, paid and earned media in disseminating campaigns. As a collaborative approach, this integration will add Value to messaging interventions spanning various channels and target channel-specific patient groups.

A stylized lightbulb graphic with a colorful, faceted glass body in shades of blue, green, yellow, and pink. It has a grey base with horizontal lines representing the screw threads. Several short, colored lines radiate from the top of the bulb, suggesting light or ideas.

Media consumption is rapidly morphing into a barrage of online and social media types woven throughout nearly every waking moment of our lives

Voices



Ajey Maharaj
Head— Corporate Communications at Fortis Healthcare

Effective storytelling has always one of the major differentiators between brands that are noticed and those that aren't irrespective of their history and presence in particular market. For healthcare agencies to be successful, the primary imperative has always been to stay ahead on the skills curve, which then leads to better and effective storytelling.

Becoming a skilled and understanding communicator is a key characteristic of an effective communication agency, one that always places the lens on a knowledge-based work environment, one that is always high on strategic recommendations that are always a step ahead, apart from all the usual agency attributes, include those that always encourage client centricity.

In the healthcare business, the patient is always the priority—the pivot around which the entire system revolves. Unlike consumers, patients have already engaged with the agency in some way, already experiencing their skills and services, even though it may be more apparent in the case of long-term patients. Consistent communications with patients and patient groups will keep bringing them back and ensure a long-term relationship. There is really no better alternative to treating patients well because of which they are more likely to recommend your services to friends and family when they are looking for healthcare.

Good communication is very essential for effective health care and if the communication channel is missing, the entire business is likely to suffer. A report by CIRCO shows that 80 percent of serious medical errors result from miscommunication between providers, raising the argument in favor of tools, practices and knowledge that leads to improvements in communication. As healthcare delivery grows more complex, organizations will handle more and more data than ever before simply leading more opportunities for communications to fail.

Advanced medical technologies, including the availability of modern diagnostic and therapeutic equipment, have revolutionized the way healthcare is being delivered in India today. The interplay between ICT technologies has given rise to 'tele-medicine', which in many ways addresses the lack of manpower and problem of access to quality healthcare.

Robotics is today making it possible to conduct complex surgeries that were otherwise in the realm of impossible high-risk interventions. We are now looking at virtual reality (VR) systems and chatbots. In the coming decade, they will allow us to connect with our target market in a more efficient manner, help them understand and experience our products, familiarize us with the dynamism of constantly changing technology innovation and finally provide us with collective perspective and feedback that will help shape much of the future of healthcare communications.



***Becoming a skilled & understanding communicator
is a key characteristic of an effective
communication agency***

Voices



Raymond Francis

Head of Communications— Asia Pacific, Cardinal Health

One of the key areas of expansion in the future for healthcare communications firms will be consulting. In the current environment, agencies act as the channel managers between stakeholders and patients. In the future, agencies will need to be able to offer a mix of communications advisory and business counseling services. For example, a healthcare communications agency could be called upon for advice on navigating the complexities of regulatory policies in a therapy area or a specific market in relation to product marketing, perhaps even about assessing political risk within a specific national geography.

Increasingly, industry clients will want to partner with healthcare communications experts who are able to act as a strategic advisor that is adept at building and fostering a trust network between the client, regulators, healthcare professionals and patients. The role of an agency will no longer be restricted to image building, but also reputation management and business strategy consulting.

For a company entering a non-native market, for example, the onus will lie on the communications agency's advisory experience firm to provide counseling and consulting on what media channels of media to use, stakeholder engagement platforms to be leveraged, or to employ the right kind of research and talent for a range of issues, products or services.

A strategy that applies in China may be totally inappropriate for Singapore or India. Communications firm will need to possess a deep understanding of markets and industry intricacies so that they will be able to select the best possible medium to position a brand. What we're looking at is a paradigm shift in the way we engage and build relationships with different stakeholders and patient groups.



Aparna Mittal

Healthcare Entrepreneur, Founder, PatientsEngage

Patient groups are at the core of any healthcare ecosystem and are increasingly gaining voice, even in Asia. Thanks to digital platforms like Patients Engage and social media they have access to information which they did not have in the past. They are also able to mobilize themselves to create momentum around specific demands and initiatives. This awareness about increasing patient participation in the medical ecosystem gives Life Sciences companies and PR agencies an opportunity to tailor messages based on the kind of audience they will be serving.

Each market segment has its unique cultural grounding and nuances. As communication partners, it is our responsibility to understand the local needs and produce an amalgamated narrative that patients can identify with and trust. To spread the message across different patient groups spanning ethnicities, gender, class, rural-urban population, we will need a multi-channel approach. What's important is making the final call in choosing the spread across the channels. The decision will rest upon the message you are trying to communicate and the audience you are targeting. If we want to make the engagement stronger, we need to look at a combination of tools. Face to face communication is essential but if a meaningful engagement must be maintained over an extended period of time, we will need to tilt toward neutral, trusted and credible digital and social media platforms.

Voices



Sarita Bahl

Country Group Head — South Asia, Communications & Public Affairs at Bayer Group in India

Strong, emotive story telling will continue to rule and guide all communication tools. If you don't have a story to tell or are unable to tell a story that strikes an emotive chord, then you are not communicating at all. Why? Because health is a personal, private and emotional subject and therefore must have a narrative that resonates woven into your communication strategy.


As digital takes the lead over traditional PR, press releases and blogs, for instance, must become more creative and innovative. There is a growing consumption of short videos of HCPs (talking of the illness, treatment options), beneficiaries (wherever legally permitted, sharing their experiences), and survival diaries (especially in the case of cancer patients), V-blogs by HCPs among patient groups.

By no means does this imply that print is dead! But agencies today must be one step ahead while decoding policy and its implications for companies and patients alike, often if not always, offering hybrid solutions where the lines could be blurred between a public affairs offering and a media amplification campaign in support of an advocacy project.

Let's consider India where we have a most unique opportunity of using our culture and diversity to our advantage. The vernacular medium is the king when it comes to communicating at/to the last mile. No company today can afford to ignore the role of regional media, where specific campaigns in Indic languages can be designed always with an eye on the cultural and social context in that region. This will more often than not lead to communications strategies that impactful.

The impact of policy decisions has always been the pivot of healthcare communications, something unlikely to change since the pharmaceutical industry is one of the most regulated sectors. A key barrier to regulation impacting healthcare communications is the lack of understanding and knowledge about the latest discoveries in science and how they are changing the whole healthcare paradigm. Until regulators are bought to speed, we will continue to have policy decisions that are not holistic and do not take the bigger picture into account. It is not without reason then that a model that can deliver greater Value, deeper Expertise and, therefore, a more sustainable Trust is going to be the key as we move forward.

Within all this, the use of mobile apps, VR (virtual reality) tools & Chatbots is evolving becoming the order of the day. The world of AI (artificial intelligence) and robotics will define the new communication wave in healthcare perhaps far more practically than in any other industry or sector. And let us not forget the accelerators and start-ups that are moving the goal posts every day using new technologies to redefine outcomes and impact. The way forward, therefore, is to take a smart approach backed by rationale i.e. to cut through the clutter and use an integrated approach, not just social media alone, to deliver our strategic communications narrative.



A key barrier to regulation impacting healthcare communications is the lack of understanding & knowledge about the latest discoveries in science

Voices



Vince Docherty

Head, Communications, Growth & Emerging Markets Business Unit - Takeda

In the ever-evolving healthcare landscape, while patients have always been the key audience, many communications agencies miss the point that the patient of tomorrow will no longer be a passive listener. The patient group is transitioning from mere receptors of knowledge to active participants and patient advocacy will grow from this point on with much greater focus on knowledge-based collaborative engagement models. Hence, communication strategies today must be designed in a manner that feed a demand to understand information, particularly around emerging drugs, therapies, medical devices and technologies. Thus, the future of healthcare communications rests on fulfilling a number of key expectations, including our ability to anticipate, prepare, and mould businesses. The ability to see around the corners and anticipate probable regulatory changes, use that information to counsel business partners, and help businesses mould their strategies will distinguish a credible agency from its rivals.

As the tools of communication become increasingly digitized, a deep understanding of regional culture and language can actually help build business rather than acting as a barrier. To execute impactful campaigns, we will have to represent local insights in a nuanced manner so that the industry's best practices can resonate even in an isolated neighbourhood, while also adding value to business strategy. That said, a communications firm will no longer sustain in the market solely on the basis of media reach, the driving factor will be building sustainable trust via greater value and deeper expertise. One of the operational challenges that agencies face is their ability to communicate accurately and quickly, often hampered by the strict regulatory environment of the healthcare industry. This is where the agency has to take onus for responsibly communicating a brand's perspective without sidetracking from the message or regulatory policies. I feel that reputation is a function of trust, the more the people trust your actions, the more you are able to communicate better and expand your influence in the market. The way forward is in bridging the trust deficit, a continuous challenge in explaining patient groups what the pharma industry does and how it contributes to society. With the evolution of data tracking systems and VR and Chatbots likely to find a strong hold in the future communication strategies, I still believe that integrated is definitely a no brainer. As communication partners, we have to harness the potential of the combined value of traditional PR and emerging technologies to represent a coherent image.



Rimmi Harindran

Regional Head of Communications - APAC at Merck Group

Access, research and development, reputation, relevance of drug portfolio and investments are some of the key themes bandied around when we talk about healthcare communications. Transparent communication, customized to an audience, at relevant stages is the state of play especially because it can always empower.

Marketing communication is an opportunity, to build trust. Unlike PR professionals working in other industries/sectors who may simply be helping sell a product in a particular market, healthcare PR professionals are providing something much more personal: the patient's trust and goodwill. Yet, it is equally easy to sacrifice patient's goodwill at the altar of profit!

We are also living in times when consumers are far more educated about their healthcare buying and spending decisions. We must recognize the need to engage more consistently with patients to ensure that we can find the optimal balance between brand advocacy and treatment received. In the healthcare industry, a PR professional is accountable to myriad stakeholders – physicians, consumers and vendors and, hence, it is imperative to understand the audience, their goals and challenges. While communication strategies are being created for global projects, there is no “one size fits all” approach. No company today can afford to ignore the role of regional media. Specific campaigns in specific languages designed for a specific state and in keeping with a cultural context will lead to a more evolved strategic communication model. The vernacular medium is the key when it comes to localization of PR strategies and It is equally crucial to customize messaging while engage with audiences spanning many demographics, always tailoring the message to address their demands.

Voices



Amit Chaudhary

Chief of Brand & Communications at Medanta, The Medicity Hospital

The proposition for healthcare rests entirely and absolutely on trust. This is the single greatest asset and the only driver of reputation. Both trust and reputation emerge from an experience that must be consistent. In this, the patient is the fulcrum.

A single overarching audience whose best interest must permeate the healthcare ecosystem at all levels is the patient. In a hyper-connected world with an ever-increasing rate of change and disruption of every kind, predicting a decade-long shift is next to impossible. As I see it, the nature of healthcare delivery, and with that the nature of hospitals, will alter completely. The hospital of the future will be your own home. Recent research has shown that 46% of hospital care can move to the patient's home.

While patients can be treated at home, the online world with the disruptive influence of artificial intelligence (AI) is helping expand the manner in which healthcare communicators can spread awareness. I like to think of Chatbots as the battle of the bots, which have fundamentally altered communications. Falling on a spectrum of AI, they can be simple, or they can be complex. I see the healthcare domain and financial services sector leading in the adoption of Chatbots. This is because the two are that much more reliant on structured processes that are best suited for automation with Chatbots. But these are skill Chatbots. And, we all interact with them. Conversational bots are coming very soon and these will be smart enough to offer custom answers to customers. I prefer a human interaction, but Chatbots are here to stay. Therefore, our investments in digital must increase manifold.

Finally, a look at the intense, high frequency and immediacy led spheres of healthcare ecosystems, always intolerant of inefficiencies or inaccuracies on any threshold. This is the metric healthcare delivery models pursue. It defines everything from medical outcomes to organizational management. Among the communication tools used in healthcare delivery, the Healthcare Information System (HIS), with its incremental iterations, remains the most fundamental and essential. In a contemporary context the Internet of Things (IOT), Big Data, AI, VR/AR and Robotics are technologies and applications, which are defining and driving healthcare communications across the spectrum.

Technology is also expanding the contours of trust as a construct of individual transactions and comfort between patient and doctors with a movement towards a new engagement model that places the onus on delivering greater value and establishing deeper expertise via collaboration and training.



In a hyper-connected world with an ever-increasing rate of change & disruption of every kind, predicting a decade-long shift is next to impossible

Voices



Aman Singh Madaan
Vice President— Corporate Communications, Netmeds

Patients as end users and beneficiaries of any healthcare service will always be central for healthcare communicators not just today but in the next decade as well.


It's the focus that has changed from a volume based approach towards a value-based healthcare model that recognizes the emergence of the always on and engaged patient empowered by the democratization of information access in the digital era. This is leading to an approach that looks at providing quality healthcare treatment for the whole patient lifecycle, engaging different stages of illnesses or therapies, and in consonance with varying needs of a more empowered and engaged patient today.

To address the communication needs in healthcare today, no one medium can be considered adequate, effective or preferred. The consumer's needs are dynamic and, therefore, the message too. A multi-channel approach targeting different consumer groups and effectively utilizing different mediums is already gaining momentum today. How healthcare communicators and agencies leverage this approach and perfect it over time will be the key. In the future, as disruptors like artificial intelligence and machine learning become more mainstream, we will witness the rapid expansion in customized campaigns complemented by more evidence-based messaging for individual brands, issues and therapy areas.

Facebook and Instagram were the largest social media platforms until 2018. In 2019, TikTok changed the game. Primarily used for entertainment, TikTok has emerged as a vibrant medium for many brands in the country today. However, as far as the healthcare industry is concerned, Facebook remains the primary medium for sharing information and details on health or health-related content.

Just like other sectors, the healthcare industry is also going through its own process of digitization. Indeed, there is no doubt today that technology is set to revolutionize every vertical in the healthcare industry from medicine delivery, doctor's consultation and diagnostics to robot-assisted surgeries, virtual nursing assistants, administrative workflow assistance, fraud detection, demand forecasting, procurement planning and many more crucial processes.

Artificial Intelligence and Machine Learning are not only helping us understand our consumers better with more targeted insights but are also making more realistic predictions about the future. Just as this is aiding the industry to build a more robust preventive healthcare ecosystem, it also empowered healthcare communications with better response mechanisms, facilitated timely and more consistent communication, and helped lower turn-around time in engagements between consumers and the business.



Artificial Intelligence & Machine Learning are not only helping us understand our consumers better with more targeted insights but are also making more realistic predictions about the future

Voices



Denise Nah

ASEAN Communications Leader, GE Healthcare

Communicators in the healthcare industry have always been at the center of great dynamism changes in existing public relations strategies. While the intent has often been to drive traffic through digital platforms, what will set an agency apart from others in the future will be their ability, for instance to create personalized or bespoke content like corporate blogs that stand apart by their ability to engage audiences in new unique ways.

Consumer engagement as key part of a brand's service offering was always a daunting task, especially in the context of a shift towards more informed patient groups increasingly willing to participate in decision-making and expecting more and more specialized information instead of mere answers to questions that was the norm for a long time.

Indeed, it is evident that we must align our content creation skills with this new consumer dynamic where expectations are changing rapidly and there is greater inter dependence between the patient and the caregiver.

From just being the eyes and ears, covering regional healthcare needs, or complementing industry-led knowledge, our task is ever more multilayered. Moving beyond the barriers of language and culture, an agency must focus on a more market-specific personalized and localized communications approach.

The future of healthcare communications is also in the integration of media channels, where "language" and "culture" will no longer be a barrier. Rather, the two aspects must add to curated narratives that resonate with the local expectations and simultaneously make the consumer aware about the best practices in the industry.

When it comes to creating an impactful narrative, communications, which has been tailoring messages for a while, will need to also create capabilities that can accurately assess the impact of their stories in a specific market. While Chatbots could drive campaigns and awareness programs, understanding the expectation of your audience will always be the key, while matrix and algorithmic analyses will play a major role in measurement, helping gauge the qualitative aspect of key messages. This I believe, in turn, will not only foster and retain the consumer's Trust in a brand.



Sidney Yee

Chief Executive Officer|Diagnostics Development Hub (DxD Hub); Senior Advisor|A*ccelerate

Patients should always be at the center of the healthcare industry.

In the future, as we witness an expansion in the knowledge base of patients, there will be a need for communications agencies to employ new and effective tools spanning multiple-channels and platforms for the dissemination of information.

For instance, we are looking at artificial intelligence (AI) and other intelligent digital disruptors in the years ahead to shape and control much of the direct line of communication between healthcare professionals and patients. The key really is how we are able to strike the right balance within this direct line, as we embrace these new technologies and also strive to accurately understand the rapidly changing expectations of our consumers.

The question now is about how we address those expectations. Our awareness about everything around our brand—including our passion about the message from the perspective of the patient or being cognizant of regulatory guidelines—is going to drive the future of healthcare communications. Finally, there is no doubt that our abilities will always be tested when it comes to integrating the media with impactful, patient-centric stories.

The future of healthcare communications promises virtual reality (VR) and chat bots, but the key to our impact will always remain in our ability to humanize the technology, while making healthcare more personal.

Voices



Laura Faulkner
Brand Consultant, Activiste Pte Ltd

As digital technologies begin to become more rampant in the communications business, analytical tools will become a key source for not only tracking and evaluating effectiveness of campaigns, but also as a rich source of data to provide insights into consumer behavior.


The communication strategies of tomorrow will depend on how well we utilize this pool of information and ensure that patients and healthcare providers have a coherent understanding of each other's needs. Thus, the key audience in the future will definitely be the patient group, while agencies will be expected to align their communication strategies with HCPs, regulators and the scientific community so that the information is consistent. Furthermore, healthcare communications will need to focus on delivering greater Value complimented by investing in time and resources to offer deep Expertise, staying current with the latest changes and trends in the larger political landscape and in their client ecosystems.

What will define success in the future for a communications agency will depend on its adaptability to evolve with the changing times, be it technology, regulation or patient needs. Establishing a deep understanding of local cultures and languages can go a long way in developing patient-centric campaigns. For instance, in Asian cultures, hospice care is often misunderstood as being "unfilial". We must look at ways to identify the opportunity for our campaign to position itself in a manner that would best resonate with the target audience.

In an environment where strict regulation around communications by pharmaceutical and healthcare-related companies is the norm, campaign messages often run the risk of becoming convoluted and saturated replete with technical and medical jargon in compliance with the medical and legal guidelines. As a result, this can turn-off audiences and hinder effectiveness of any campaign and this is where we must wear our creative hats and employ compelling patient stories or other human-interest stories to convey our messages in more meaningful ways.

With digital becoming increasingly prevalent and analytics improving in robustness, VR and Chatbots are opening new avenues for creativity in engaging with audiences while retaining a high level of interaction between audiences and the brand. Key to this is ensuring that such technology can be used while remaining mobile friendly and easy to access without the need to download dedicated apps.

Beyond the number of impressions or reach of a communication piece, most clients want to see if audiences are taking actions based on the communication they received. In healthcare, this could be measured by the number of clinical appointments required with a doctor about a medication, the number of visits to a website to find out more information about a health condition, or the number of times a campaign hash tag was used to raise awareness for example.



The communication strategies of tomorrow will depend on how well we utilize this pool of information & ensure that patients & healthcare providers have a coherent understanding of each other's needs

Voices



Janice Apilado

Corporate Communications Manager at Asia Pacific Leaders Malaria Alliance (APLMA)

One of the key findings of the 2018 Edelman Trust Barometer showed that Healthcare is one of the sectors where trust scores dwindled in a few important markets such as the US and Japan. In the Philippines, the Dengue Vaccine Controversy caused panic among parents who stopped vaccinating their children completely.

This is where PR – not limited to Reputation Management, Crisis Communications, Media Relations, and Digital Campaigns – could prove decisively useful because of their ability to effectively and strategically deliver key messages to target audiences through the right channels and at the right time. Trust in healthcare sector could be rebuilt using this very same mantra.

I believe the future of healthcare communications will be digital technology. According to Grand View Research, the VR and Augmented Reality (AR) healthcare industry will be \$5.1 billion by 2025. In our line of work, in the Asia-Pacific region, for example, virtual reality (VR) could be a very useful tool to reach key decision-makers as part of an advocacy campaign seeking quality healthcare, while bring to an end an invisible disease in the region.

Many companies and movements have underscored the importance of context and local nuances in their campaign development. For one, big brands like McDonalds, involved a process called “glocalization” where they adapt global and international products into the local contexts they are used and sold in. This strengthens the fact that while global culture is stronger than ever, our ability to pick up local nuances, values, language and to fuse that with a focus on providing greater Value and Expertise, which can strengthen long-term Trust will be the key to creating marquee campaigns that boost both patient goodwill and sustainable profit in the future.



Neethiya Sadagopal

Communications Manager at Becton Dickinson Company

The biggest healthcare communications challenge faced by pharmaceutical and healthcare-related companies has been rise of robotics, Big Data and other technology disruptors, apart from non-traditional service providers such as Amazon moving into the pharmacy and health food markets.

Communication partners regardless of the industry they are serving must become the window that allows organizations access to the next megatrend, even before it becomes a trend. This can happen only when agencies move beyond just being execution partners that deliver programs to truly become strategic counsels who can offer greater Value and deep Expertise to ultimately build sustainable Trust, This I believe is the emergence of a new model of engagement called the value, expertise and trust model that thrives on collaboration fueled by insights and knowledge flowing from experiences spanning multiple industries. Given the advantage of working with a diverse set of clients, agencies must leverage their access to first-hand knowledge of what is a picking trend and what is losing sight with the business environment to deliver better outcomes. Becoming a trusted advisor that understands the business and yet is able to inject recommendations and innovative approaches that can justifiably challenge the status quo can often positively impact a client’s business, while partnering with the extended communities that client organization serve will also be the key to success for agencies in the next decade.

In Asia, in particular, the diversity of languages and cultures offers the best test-bed to create bespoke campaigns for individual organizations. Many big brands have often ignored this at their own peril and the punishing outcomes they have been served bear witness to the fact that while there could be similarities in the way campaigns are executed, strategic storylines must be crafted with a keen ear to the ground in a specific local environment.

Acknowledgment

WE would like to thank the members of the healthcare industry for sharing their knowledge, expertise and valuable insights that helped us navigate through the complex healthcare landscapes, understand communication challenges better and create a perspective on the future of healthcare communications. We would also like to extend our gratitude to the partners who made the report possible with their actionable insights, creating a platform for stakeholders to work towards aligned actions. Last but not the least, we would like to thank the creative team for their efforts in bringing this report together by assessing the information and decoding it for the readers.

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Asia-Pacific Healthcare Consultancy of the Year



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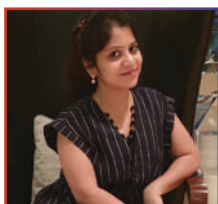
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