



LEVEL 7 ASSESSMENT SPECIFICATION

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Executive Summary

This report reviews and evaluates the current marketing campaign of DrGo, a one-stop mobile platform for telemedicine in Hong Kong.

Telemedicine has not been widely adopted in Hong Kong. It may be due to the living style in the city where medical service is easily accessible. There is also no regulation by the Government on such service. During the pandemic, the 'new normal' has given the opportunity of growth for such service and the willingness to try by the Hong Kong population was increased drastically. The macroenvironment analysis favors the development of the telemedicine in Hong Kong but the long term sustainability of such service remains uncertain after the pandemic.

There are similar providers in Hong Kong providing telemedicine services, but they differ from the business model and target group. Amongst those competitors with similar business model, DrGo was compared with two other platforms, DoctorNow and DrApp, serving similar customer base. The marketing campaign of DrGo was designed based on lifestyle and age segmentation, targeting young working population with busy lifestyle where telemedicine can provide convenience as an advantage. The marketing mix strategies on product, price, place, and promotions were reviewed and concluded that DrGo has a competitive advantage by providing quality service at reasonable pricing.

It is uncertain that the demand of telemedicine will be retained post pandemic although it is believed that this can relief the burden of the medical system worldwide. For long term sustainability of DrGo, it is recommended that they expand the marketing mix to cover the pre-elderly group, equipping them to familiarize telemedicine as an alternative for long term health monitoring; as well as building customer loyalty as means of customer retainment prior to service maturity.

1. Introduction

Telemedicine can be defined as “the practice of medicine over a distance, in which interventions, diagnosis, therapeutic decisions, and subsequent treatment recommendations are based on patient data, documents and other information transmitted through telecommunication systems.” (The Medical Council of Hong Kong, 2019). It has a long history back in 1879 when telephone was used to reduce unnecessary patients visits to clinics (Board on Health Care Services and Institute of Medicine, 2012). In 2020, the worldwide demand of telemedicine increased significantly due to the COVID-19 pandemic (Wong et al, 2021) and the Hong Kong Telecom Group launched a one-stop telemedicine platform, DrGo, in Hong Kong. It is a mobile platform where customer can receive paid health advice through teleconsultations with doctor from a remote location within Hong Kong. Since launch, DrGo received 88,000 registered users in its platform (HKT, 2020).

2. Scope and Objective

The objective of this report is to review and evaluate the appropriateness of the marketing campaign of DrGo, and to provide recommendations for sustainability in post COVID-19 era.

During the review, literature review will be used and to make recommendation for the future marketing plan. The study has limitation to evaluate the outcome of the marketing strategies as no internal data on the service delivery could be obtained.

3. Situation Analysis

In Hong Kong, telemedicine has always been lagging and it is classified as a conservative adopter prior to the COVID-19 pandemic. The reasons behind are that Hong Kong is a high-density city where medical services are easily accessible. There has also been lack of Government's support on regulations and guidance (Cheng, 2020).

To understand the macro-environment of telemedicine in Hong Kong, a PEST analysis has been selected in this report.

3.1 Political analysis

Telemedicine is not mandatory to be regulated in many countries. WHO (2016) conducted a survey that approximately one quarter of its member states said that there was a national telehealth policy or strategy in their countries. In Hong Kong, the Medical Council of Hong Kong is the appointed authority to regulate the practice of telemedicine by medical practitioners, who has set out an ethical guideline on Practice of Telemedicine in Hong Kong (The Medical Council of Hong Kong, 2019). During the practice of telemedicine, the doctor must comply with the privacy laws where medical records and healthcare data are protected under the Personal Data Privacy Ordinance (Ellis, 2021). It has recently been reflected in the Legislative Council that the Government and relevant healthcare authorities should take the lead in planning and supporting the development of telehealth services in Hong Kong (Cheng, 2021).

3.2 Economical analysis

Many literature reviews have shown that telemedicine brings benefits economically. Dullet et al. (2017) concluded that for more than 10,000 patients in United States, the mean per-consultation round-trip distance savings were 245 minutes, and USD156 on average. In Singapore where telemedicine is used in long term diabetic care, study has shown that telemedicine only included direct medical costs where the average cost saving in the health system was SGD 144 per person (Nguyen et al., 2016). Unfortunately, the development of telemedicine service in Hong Kong has been slow and there is lack of data supporting the cost effectiveness of telemedicine on overall medical cost.

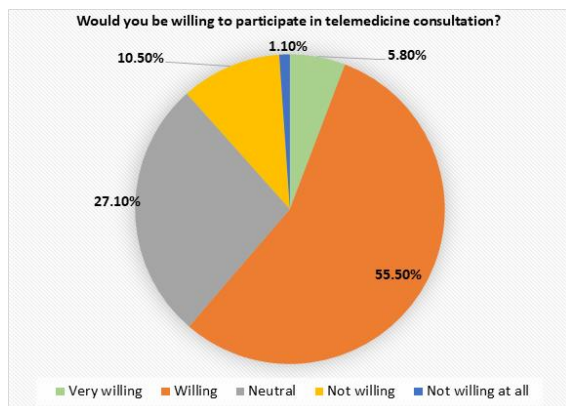
3.3 Social-cultural analysis

The COVID-19 pandemic has caused a sudden surge in demand in telemedicine in Hong Kong as many private health care settings are excluding patients with respiratory symptoms (Whitehead, 2020). The fear from the public to attend a medical clinic also contributed to the factors increasing the demand. Tang (2020) mentioned that one local medical services platform observed the number of online consultations on their platform had multiplied since the outbreak. Cheng (2021), representing the Legislative Council Hong Kong, also endorsed that telemedicine can help avoid direct physical contact with patients and minimize the risk of Covid-19 transmission.

A Digital Health Survey conducted by a marketing company asked 520 people on their perception on telemedicine, from a scale of 1 to 5 with 5 being 'very attractive', 49% of the sample rated 4 or above. The main reasons to use such service were categorized as

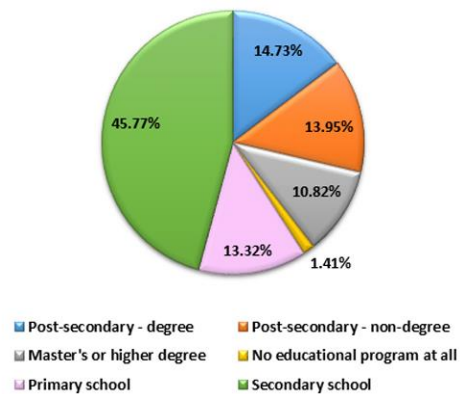
convenience as there was no need to queue at the clinics and the consultations could be held at any time at home. However, most of the population would still prefer to have a physical visits to hospitals or clinic (45%) given that if the telemedicine service was an option (Cimigo, 2020). The results were similar to a survey done by the Lingnan University for senior citizen in 2020, which the willingness of trying telemedicine under the midst of pandemic was carried out (Lingnan University Hong Kong, 2020). More than 60% of the senior citizens were willing to try the telemedicine service under the COVID-19 pandemic (Figure 1); and the education level of those senior citizens were amongst those with secondary education of above. The result also showed that the willingness to undergo online medical consultations may vary depending on the education level and living standard (Figure 2 and 3).

Figure 1. The Willingness of Using Telemedicine Consultation Amongst Senior Citizens in Hong Kong



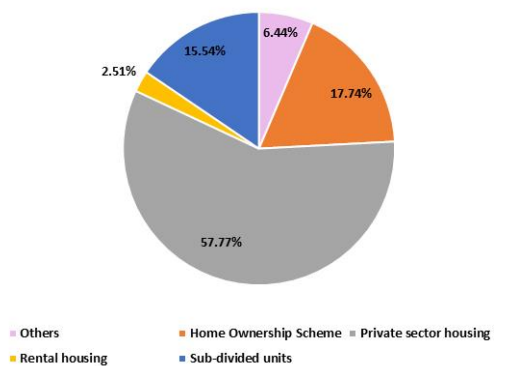
Source: Lingnan University Hong Kong(2020)

Figure 2. The Willingness to Use Telemedicine Bbased on Ecation Level



Source: Lingnan University Hong Kong (2020)

Figure 3. The Willingness to Use Telemedicine Based on Housing Standard



Source: Lingnan University Hong Kong (2020)

3.4 Technology analysis

In Hong Kong, telemedicine is usually done via digital health platform set up by private company, or through the hospital's own system (Hospital Authority, 2021; Hong Kong Sanatorium Hospital, 2020). In Hong Kong, 6.5 million people are estimated to have a smartphone and it is predicted that by 2025, 93% of the population will use a smartphone (Statista, 2020). This reflects that telemedicine using a mobile platform is easily accessible by

the population. The development of the 5G network, as well as other digital health transformation by the Hong Kong Telecom Group is also supporting the development of digital health in Hong Kong in the near future (HKT, 2020).

Table 1. Summary of PEST Analysis

Political	Economical	Social-cultural	Technology
• No governing law in HK • Inconsistent practice worldwide • Only ethical guideline from the Medical Council, HK • Obligation to privacy data protection	• Cost saving in medical expenditure • Reduce travelling time and cost • Not enough data to support in HK	• New public interest under the pandemic • Encourage social distancing • Recent studies in HK show public willingness to try	• Mobile phone usage is prevalent in HK • Easily assessable by the public • Ongoing technology development in HK

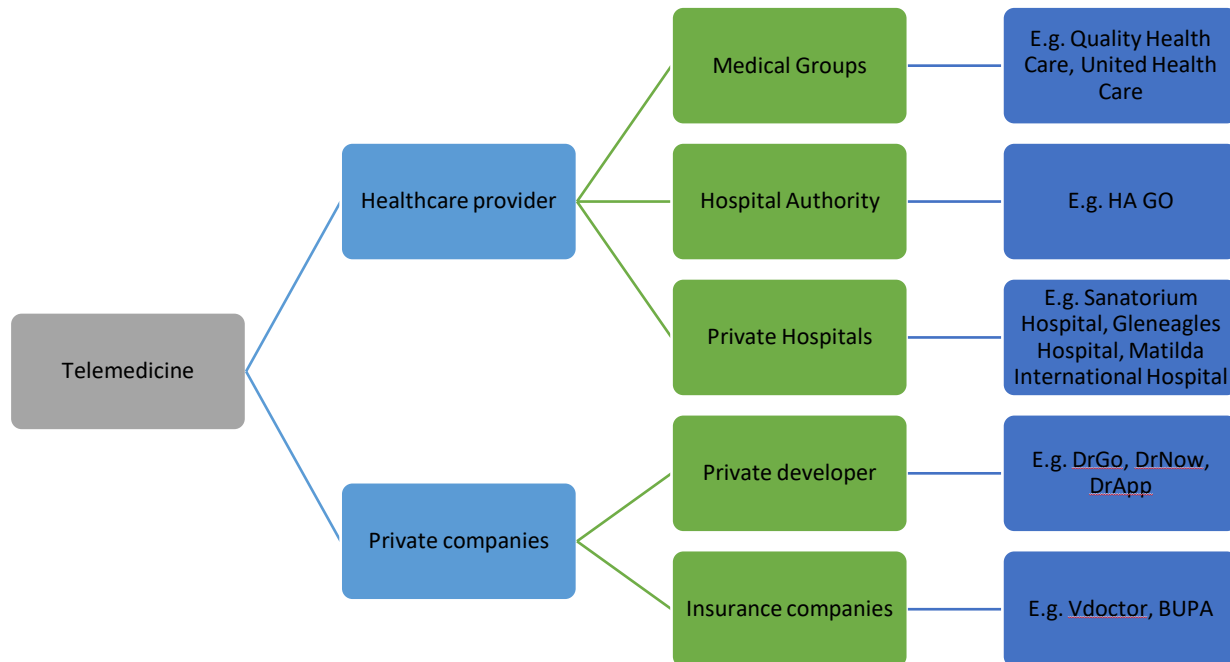
Source: Illustrated by the author

In conclusion, based on the above results, Hong Kong population is willing to try the telemedicine as an alternative to physical visits and the macroenvironmental factors have favored the development of telemedicine in Hong Kong. However, there is a lack of data and the Government's regulation to support the long-term development of telemedicine in Hong Kong and the true willingness and demand of such service post pandemic remains uncertain.

4. Market Competitors

In Hong Kong there are various providers of telemedicine, and the market of telemedicine can generally be categorized in Figure 4.

Figure 4. Sources of Telemedicine in Hong Kong.



Source: Illustrated by the author

The major differences amongst these service providers are their target groups and the business models. For instance, services provided by the healthcare providers focus on their existing patients whereas for private companies, such relationship is not required. For private companies, it can also be subcategorized as private developer and insurance companies. The former focuses on the public as the target audience whereas the latter focuses on their

members only. By looking at the business model, DrGo fits into the private developer business model, thus comparison with the competitors will focus on such group (Table 2).

Table 2. Competitors' Analysis

	<u>DrGo</u>	<u>DoctorNow</u>	<u>DrApp</u>
Website	www.drgo.com.hk/	app.doctornow.hk/	www.drapp.com.hk/
GP consultation	✓	✓	✓
Specialist consultation	✓	✓	✗
Other Services	Health store, covid testing	Appointment booking, home care service	HA service waiting time, appointment booking, education
App availability			
- Google Play	✓	✓	✓
- Apple Store	✓	✓	✓
Incentive for sign up	✓	✗	✓
Service Hour	Mon- Sun: 8am-8pm	Not listed	Not listed
Delivery of medication	✓ (within 4 hours)	✓	Not listed
Price	HKD 368-450 (3 days medication)	HKD 400 – 780 (not mention about medication)	Not listed
Doctor network	Gleneagles Hospital; Matilda Int'l Hospital; Precious Blood Hospital; Quality Healthcare, etc	Private doctor network	Private doctor network
Social Media	✓ Facebook (1,051 likes) ✓ Youtube (126 subscribers) ✓ Google SEM	✓ Facebook (896 likes) ✓ Youtube (1 subscriber) ✓ Google SEM	✓ Facebook (28,150 likes) ✓ Youtube (1.14K subscriber) ✓ Google SEM

Sources: Illustrated by the author

The competitors' analysis shows that DrGo provides transparent information amongst the competitors. It clearly highlights the service pledge of medication delivery; the cost of consultation; the doctor networks; and the service hours. It is also the only platform that sells other services such as health checks and vaccination. In conclusion, given the high transparency of information, DrGo has competitive advantage amongst the competitors.

5. Segmentation, Targeting and Positioning

DrGo makes use of concentrated targeting strategies involving just one or few sub-markets (Camilleri, 2018). It is also called niche marketing which brings advantages to a firm as there is a more focused customer base which is easier to satisfy the customer's needs (Akbar et al., 2017). The market segmentation of DrGo can be concluded as Lifestyle and Age. This is based on the below justification:

1. The advertising messages are generally based on the inability of going to seek medical service while working overtime; the fear of going to the clinic due to the crowd; and the convenience, easy access of the app with medication delivery to home (Appendix 1). This relates to people with busy lifestyle and working life, as well as those who are familiar with use of technology.
2. There is no celebrity endorser for DrGo, however, in a recent marketing campaign, DrGo is sponsoring an online concert by a pop singing male group, Mirror, which is the recent hottest singing group amongst the young generation (Appendix 1).
3. The marketing channels for DrGo mainly based on facebook and youtube (Table 3), there has not been any TV advertising or traditional marketing promotions. Based on the statistics published by Napoleoncat (2020), about 75% of the Hong Kong population is Facebook users, with the largest user group aged 25 to 34, followed by 35-44 years old.

Based on the above evidence, the market segmentation can be justified as Lifestyle and Age and the target group can be summarized in Table 4.

Table 3. Social Media Analysis of DrGo

Social Media Channel	Subscribers	Total no. of post	Product Selling	Event and Promotion	Educational	Paid Advertising
Youtube	113	6	2	1	3	✓
Facebook	1,025	46	32	7	7	✓

Source: Illustrated by the author

Table 4. Summary of Marketing Segmentation and Target Group

Segmentation	Target Group	Justification
Lifestyle	• Busy Lifestyle • Interest in new technology • Working group	• Advertising message focus on working overtime, avoiding crowds in the clinic, and easy use of app.
Age	• Age 25-44	• Recent event promotion with Mirror, a male singing group • Major marketing campaign through facebook. Majority of facebook users are from 25-44 (Napoleoncat, 2020).

Source: Illustrated by the author

As the purpose of telemedicine provides convenience to the public, it is important to understand the positioning by comparing the quality and price of the competitors. With reference to Table 2, DrApp does not list out the cost of the services provided through the app, however, by looking at their doctor network, it can be predicted that the basic consultation fee provided by its network would not be higher than those provided by the medical groups. Figure 5 highlights

the positioning of DrGo which has the highest quality and most reasonable pricing amongst the three.

Figure 5. Positioning Map for DrGo and Its Competitors



Sources: *Illustrated by the author*

6. Marketing Mix Strategy

The marketing mix strategy for DrGo platform involves four elements: Product, Price, Place and Promotion.

6.1 Product

DrGo serves as a platform for the healthcare providers to sell their services. Therefore, the 'product' in this marketing mix strategy is a service. When looking into the characteristics of services marketing, DrGo should focus on the Five I's when marketing the services. The Five I's are Intangibility, Inconsistency, Inseparability, Inventory, and Interaction with customers. While it is a challenge to market for intangible services, one way to overcome that is to show tangible benefits from their use (Berkowitz, 2021). This has been well adopted by DrGo as they

focus on the benefits in their key advertising messages; DrGo also has a stable doctor network and mature technology to ensure the consistency of services. It also has a live customer support to ensure interaction with customers during the service journey. As a result, the ‘product’ provided by DrGo fulfilled the Five I’s.

6.2 Price

The price for one DrGo consultation is set as HKD 368-450, including three days medication and free delivery service. A comparison with the outpatient clinics in private hospitals is shown in Table 5. Although the price for DrGo appears to be more expensive than a basic GP consultation provided by the private hospitals, it is important to note that the price includes three-day medication and a free delivery charge, which are not included in the fee listed in Table 5. If a customer pays a physical visit to the private hospital, there will be additional cost on medication as well as the transportation cost. It is, therefore, can be concluded that the fee set by DrGo is reasonable.

Table 5. Consultation Fee in the Outpatient Clinic from Private Hospital and Hospital Authority

	Sanatorium Hospital	St. Paul Hospital	St. Teresa Hospital	Hospital Authority
Time	Mon – Fri	Mon – Fri	Mon – Fri	24/7
GP consultation Fee	HKD320-560	HKD180 - 330	HKD180- 330	HKD 50 For non-eligible patient: HKD 445
Medication	x	x	x	x

Source: The Hong Kong Sanatorium Hospital; St. Paul Hospital; St. Teresa Hospital; Hospital Authority

This pricing strategy is called bundled pricing involving several items or services together for one total price (Berkowitz, 2021). It has become popular in healthcare industry for better cost control. However, for healthcare organization to minimize the financial risk and control, care coordination strategies must be implemented at the most optimal point of delivery. With DrGo, the control of pricing is with the healthcare provider, where a list of basic medication is agreed within the service scope. Should the doctor prescribe additional medications that exceeds the three-day basic medication cost, the administrative staff should adjust the price prior to final payment from the patient. There is also a mechanism where the healthcare provider can only prescribe medication after the patient has settled the payment. This is all well designed through their platform.

6.3 Place

DrGo app can be downloaded from the Apple and Google Store. It acts as an intermediary channel between the service provider and the customer, providing a value added service to the mass market (Berkowitz, 2021). It is also marketed through the B2B channels where the service providers, insurance companies and telecom companies are jointly promoting the service to their members (Ng, 2020; Chan, 2020; HKET, 2021). This enables sharing of the big data between each other. Huang et al. (2021) concluded that big data has quickly become indispensable for marketing professionals in modern days, and the combination of big data with marketing strategies would have a significant impact on the activities of a company. Therefore, the B2B channels provides a win-win marketing strategy for DrGo.

6.4 Promotion

While DrGo is a digital platform, its promotions mainly focus on digital advertising and social media such as Facebook and Youtube. A review has been done on its promotions on online search engine (Appendix 1). It shows that both common search engines in Hong Kong, Google and Yahoo, do not result in DrGo when searching via 'virtual consultation' or 'seeing a doctor online'. The Search Engine Optimization (SEO) is often a useful tool for public to search the service (Nagpal and Petersen, 2019) and it is recommended that DrGo can enhance its exposure through SEO.

With regards to the online promotion, Table 3 shows that both Facebook and Youtube have been used as the main sources of social media promotions. Facebook is more frequently used as compared to youtube, and the messages have mainly been focusing on product selling.

The promotion of DrGo also covers for welcoming incentives, attracting new registrants and first time users (Appendix 2). This is a very attractive promotion as other competitors do not have any incentives for first time users.

7. Future Development and Recommendations

With reference to the marketing mix in Section 6, DrGo is currently at the growth stage of the Product Life Cycle. At this stage, the platform is relatively stable and there is a high market growth rate. The company has started to build share such as adding the e-commerce platform and extension to psychology and long term health monitoring services (Yuen, 2021). The product is high quality, easily assessible and at a reasonable price. It is well connected with

other business stakeholders which serves as a value-added service their customers. It is recommended to be more active in online SEO where they can attract more first time users.

As according to the Product Life Cycle theory, DrGo may be entering to the maturity stage where sales begin to slow and the competitors gradually fall out. During this stage, the objective will be to maintain the existing customer base (Berkowitz, 2021). In Section 3.3, both local marketing researches highlighted the willingness to use telemedicine service under COVID-19 pandemic in Hong Kong. However, It is not known that how the demand of telemedicine will change post pandemic. Cheng (2020) indicated that Hong Kong is a conservative market of telemedicine and the demand and need for such service is unlikely to be lasted after COVID-19. The Hong Kong Government is also starting to discuss about regulations for such service (Cheng, 2021). Nonetheless, overseas countries see that telemedicine can be a long lasting solution to relieve some existing issues of the medical system (Grossmann, 2020; Mercer, 2020). In order to sustain its service and become the market leader, other than expanding its services to build share, it is also important to build loyalty with its existing customers. Thus, below recommendations are made:

(1) Expand the target age group

A projection of the Hong Kong population published by the Hong Kong Government stated that the number of elderly people will increase from 18.4% to 33.3% from 2019 to 2039 and the elderly population will remain at over 2.5 million for at least 30 years (Census and Statistics Department, HKSAR, 2020). The rapid demographic change and epidemiological transition to chronic diseases have created significant burden in the Hong Kong Medical System (He,

2020). Moving forward, the healthcare reform, involving the transformation to digital health with a focus on long term disease management would be a way to relieve such burden. During the pandemic, it is a good opportunity for DrGo to reach the middle age group which can prepare them to be familiarize on the digital health service. As according to the survey from Napoleoncat (2020), about 12.9% of the people aged 45-54 uses facebook in Hong Kong, it is the forth highest amongst all age groups. In 10 years time, this age group would be entering to the elderly group and the need for long term health care would be higher as compared to the younger generation.

Since DrGo has already launched the service to cover for long term health monitoring, DrGo needs to adjust its marketing mix to cover for the expanded age group. Table 6 highlights the recommendations on the marketing mix.

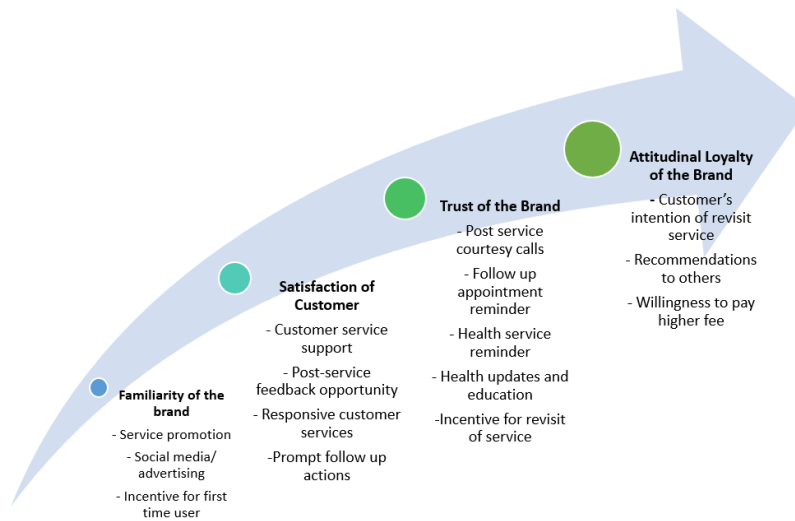
Table 6. Proposed marketing mix for DrGo

Marketing Mix	Future Development
Product	Services for long term health monitoring such as blood pressure monitoring, diabetes management
Price	- A package of multiple consultations or monthly subscription for long term health monitoring. - Redemption of health care voucher.
Place	Option for consultation through the webpage
Promotion	- New Endorser suitable for the new target age group - Video as user manual - TV advertising

(2) Increase brand loyalty

To prepare to entering into the mature stage of the Product Life Cycle, DrGo needs to stabilize its current customers and secure its market share so that it is sustainable after the pandemic. Latif et al. (2014) proposed a FSTA framework to develop brand loyalty. This includes Familiarity of the Brand; Satisfaction of Customer; Trust of the Brand; and Attitudinal Loyalty of the Brand. Currently DrGo has a customer service team to support the operation. When the customer faces issues during the consultation, the customer service team can provide support via the mobile app. However, if brand loyalty is required for future customer retention, the engagement from the customer service team needs to be enhanced. Figure 6 shows the recommendations on the customer service support based on the FSTA framework. This highlights a series of events from the customer service team leading to attitudinal loyalty of the brand. It is confident that if these are provided to the existing customers, DrGo will excel amongst the competitors and become the market leader of telemedicine in Hong Kong .

Figure 6. FSTA framework for DrGo



Source: Illustrated by the author

9. Conclusion

Telemedicine in Hong Kong has not been popular until 2020 when the Covid-19 pandemic was influencing normal daily life. It was a remarkable timing for DrGo to launch the telemedicine service and its launch was a success and was in favorable position as compared to the market competitors. Its marketing mix was appropriate and suitable for the segmentation and target group. However, as medical service is easily accessible in Hong Kong, the future of telemedicine in Hong Kong is uncertain. Government's regulation on such service is required to gain the confidence from the public and further planning from DrGo on customer retention is required for long term sustainability.

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Appendix 1

Advertising Messages From DrGo



 drgo PRESENTS

**NEVER
GIVE UP** ONLINE CHARITY CONCERT

Upon successful registration with drgo

Enjoy 1 Online Concert e-Ticket* for **FREE**

* Promotional period ends at 12 noon on 24 July, 2021. Tickets / offer are available while stock lasts. Registration with DrGo is subject to the "DrGo Terms and Conditions".



Appendix 2

Incentives for First Time Users

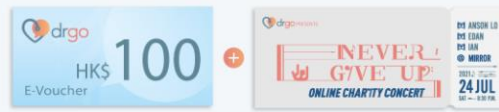
DrGo welcome gifts

The Club members or new registrants with designated referral codes



One DrGo HK\$200 E-Voucher,
one "DrGo Presents: Never Give Up Online Charity Concert" E-Ticket
and one Hung Fook Tong HK\$28 Homemade Herbal Tea E-Voucher

General Registration



One DrGo HK\$100 E-Voucher and
one "DrGo Presents: Never Give Up Online Charity Concert" E-Ticket

*Photos are for reference only. Promotional period ends at 12noon on 24 July 2021. Tickets / offer are available while stock lasts. Registration with DrGo is subject to the "DrGo Terms and Conditions", and this Offer is subject to the "DrGo Welcome Gift Terms and Conditions" (available on DrGo website: www.drgo.com.hk).

Appendix 3

Research on Search Engine Optimization

Keyword	Google Search	Yahoo Search
‘DrGo’	Top five results: 1. DrGo 2. DrGo 3. Facebook of DrGo 4. Google Play store of DrGo 5. PCCW press release of DrGo	Top give results: 1. DrGo 2. DrGo 3. CSL X DrGo 4. Apple store of DrGo 5. News from HK Economic Time – Mirror’s online concert.
‘視像會診’ (Virtual consultation)	Top five results: 1. Virtual consultation from Sanatorium Hospital 2. Virtual consultation from Sanatorium Hospital 3. Virtual consultation from Gleneagles Hospital 4. Precious Blood Hospital x DrGo 5. Facebook page of ‘Hong Kong Telemedicine Association’	Top five results: 1. Virtual consultation from Sanatorium Hospital 2. Virtual consultation from Sanatorium Hospital 3. Virtual consultation from Sanatorium Hospital 4. Precious Blood Hospital x DrGo 5. BUPA virtual consultation (provided by QHMS)
‘網上睇醫生’ (seeing doctor online)	Top five results: 1. Cigna virtual consultation (provided by DoctorNow) 2. BUPA virtual consultation (provided by QHMS) 3. BUPA virtual consultation (provided by QHMS) 4. DrGo 5. Mobidoc	Top five results: 1. Seedoctor.com.hk 2. www.beefreight.com 3. Apple daily X DrGo 4. Dr Jack Sonng virtual consultation 5. DrGo