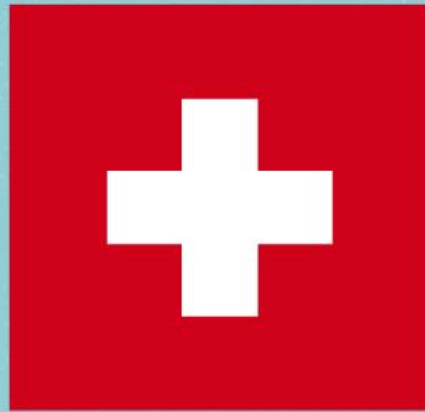# Building Healthcare Brands in the post COVID'19 Era

Ira Kaushik
ira.kaushik1@gmail.com
9821079634

Table of Contents

Executive Summary

Healthcare can be divided into various levels of care, mainly primary , secondary ,tertiary and quaternary healthcare. But a better categorization on the basis of sectors can be done by segregating the levels of care into Promotive healthcare, Preventive healthcare, Curative healthcare and Rehabilitative healthcare.
Various sectors included in the healthcare ecosystem are Pharmaceutical companies, Medical devices companies, Diagnostic, Health insurance, Med-tech, Clinical research organizations, Hospitals, Pharmacies, Non profit organisations etc.
Branding in healthcare is extremely important as it involves matters of life and death. False claims could take someone's life and on the other hand evidence based ads can save someone.
Various stakeholders or key players involved in the healthcare sector are Patients, Doctors, Nurses and Paramedical staff, Government , Regulatory bodies such as the FDA etc.
To create a branding strategy it is essential to conduct market research with respect to the competitors, consumers, customers and industry.

COVID'19 has completely changed the game for the healthcare companies. [1]
  - Leading Pharmaceutical Companies to Benefit from Global Pandemic in the race to invent the COVID'19 Vaccine
  - Hospitals will Continue to be Overwhelmed with COVID-19 Patients.
  - Long-term Consequences of COVID-19 will lead to Reprioritization of Healthcare Agenda
  - Digital Health will be the Future of Healthcare with technologies such as Telemedicine reaching to the bottom of the pyramid
  - E-Pharmacies, Wearables and IOMT will gain traction
  - Preventive Healthcare System will be the true Backbone of True Public Health
  - Big data analysis will help forecast future diseases and track the mortality / morbidity rates
  - Consumer perception will change from Curative to Preventive and Promotive healthcare

Consumer buying decisions will change as per the changing situations be it Patients or Doctors. Healthcare brands will need to adapt and change their strategies to sustain the market. Previous channels and modes of communication will be null and void and innovative techniques will be necessary to catch the eyes of the consumers
Integration , Collaboration and Mergers will be the future to build the infrastructure, personnel and funding needed to serve the patients.
Preventive care should be the basis of effective healthcare systems. However, this transition will be complex, and should be carried out in phases over the next few years. Health leaders emphasize that psychological and financial depletion of healthcare systems are likely to escalate this transition. Preventive healthcare system will completely change the way healthcare services are measured and delivered.
Countries and key players will have to undergo crucial healthcare reforms once the crisis takes a back seat. Technological advancements, cost control, and greater access will be indispensable part of healthcare reforms in foreseeable future.

"Thus Promotive and Preventive healthcare is the future ahead. Pandemic or not.

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[1] https://thejournalofmhealth.com/covid-19-and-its-impact-in-healthcare-tech-across-the-globe/

Introduction to Healthcare

" Health care is a whole-of-society approach to health and well-being centred on the needs and preferences of individuals, families and communities. It addresses the broader determinants of health and focuses on the comprehensive and interrelated aspects of physical, mental and social health and wellbeing."
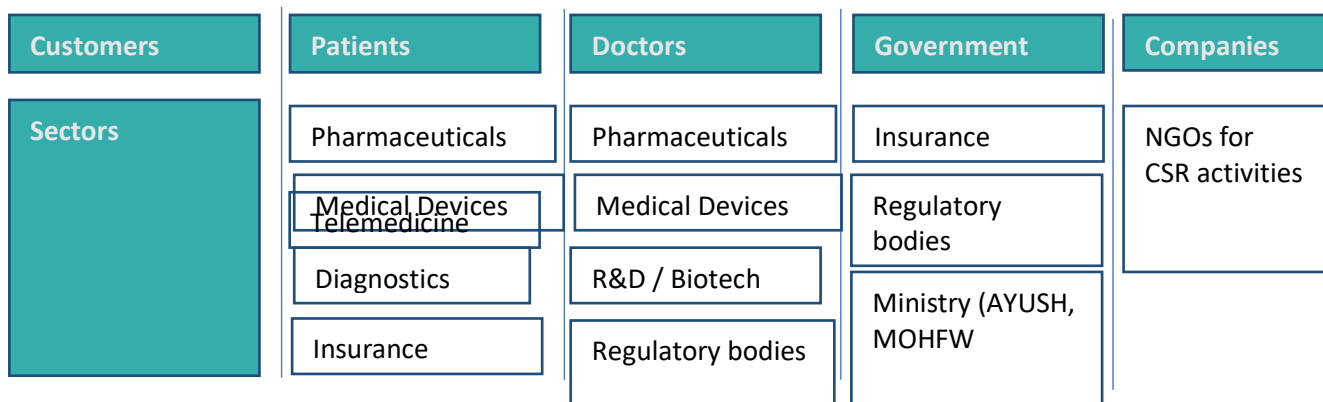
-World Health Organization[2]

- Healthcare can be divided into **levels of care:**

Promotive	Preventive	Curative	Rehabilitative

- Various **sectors** are involved in each level of care such as
1. Promotive : Wellness centres, Gyms & Fitness, Medical devices such as Smart watches
   Examples : VLCC , Curefit , FitBit etc
2. Preventive: AYUSH (Ayurveda, Yoga, Unani,Siddhi and Homeopathy), Vaccines and Diagnostics (Health check-ups), The government plays an important role in this sector such as the Pulse polio programme. The efforts used by them for branding of that programme by using Mr. Amitabh Bacchan as the ambassador does make an impact from the bottom of the pyramid to the top
   Examples: Thyrocare, Bharat Biotech
3. Curative care: Hospitals, Clinics and Telemedicine
   Examples : Apollo hospitals, Fortis healthcare
4. Rehabilitative: Pharmaceutical companies and Health insurance take care of the rehabilitation of health , Home healthcare, NGO's
   Example: Portea , Sun Pharma, ManipalCigna health insurance

- **Healthcare and It's stakeholders**

Customers	Patients	Doctors	Government	Companies
Sectors	Pharmaceuticals	Pharmaceuticals	Insurance	NGOs for CSR activities
	Medical Devices / Telemedicine	Medical Devices	Regulatory bodies	
	Diagnostics	R&D / Biotech	Ministry (AYUSH, MOHFW	
	Insurance	Regulatory bodies		

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[2] https://www.who.int/news-room/fact-sheets/detail/primary-health-care

Situation Analysis

1. PESTEL Analysis:

	Political	Economic	Social	Tech	Environmental	Legal
Before COVID	Price Capping of Drugs Changing Health policies	GDP share of healthcare Government schemes such as Ayushman Bharat	Focus on Curative care Medical tourism boom in India	MedTech start-ups with disruptive technology	Biomedical waste laws Env protection laws	CSR Laws FDA Regulations Quality Certifications and Mandates
After COVID.	Race to develop the COVID Vaccine	High unemployment , Low GDP Free COVID'19 diagnosis by Government	Focus on Preventive care Changing perspectives and prioritizing health and hygiene Respect for Healthcare workers	R&D for mass COVID'19 testing Arogya Setu and similar med tech apps for tracking of cases Data driven tracking and forecasting E-Pharmacies booming	Higher level of PPE and Medical waste Lower pollution in the environment due to Lockdowns	Focus on Quality and safety Lockdowns , section 144 etc. laws

2. SWOT Analysis

Strengths	Opportunities
• Innovations • Cost reduction and funding • Emphasis on sector • Big data collection • Highly skilled medical personnel	• Preventive and Promotive care • Focus on universal healthcare • Brand extensions, new market segments • Ongoing R&D • Collaborations with government and other organizations[3]
Weakness	**Threats**
• Lack of infrastructure • Slow vaccine development • Quality care	• Low medical tourism • High mortality rate • High competition • Economic / political insecurities • Budget deficits

Customer Value drivers

BC: Before COVID'19 , AC: After COVID'19

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[3] https://www.clearpointstrategy.com/swot-analysis-in-healthcare/

The major customers and Consumers in healthcare are Patients and Doctors / Hospitals

Doctors are the customers to which Pharmaceuticals, Medical devices companies recommend their products to via Medical representatives.
The doctors in turn advise/ consult patients for Medical diagnostics, Drugs and other therapies.

For launching any product in the healthcare sector is it critical to analyse the impact of the product on these two stakeholders.
Post COVID'19 , the Doctor patient dynamics have improved drastically building back the trust that was starting to get lost in doctors and other healthcare practitioners in the past.

Pharmaceutical companies target patients directly for generic drugs/OTC products such as Vicks and Antacids, Thermometers etc.
Insurance companies also target consumers directly

Medical devices companies and Pharmaceutical companies target doctors and hospitals for Prescription drugs and Surgical equipment.

Prior to COVID'19 the Doctor patient trust was not as firm as it is today and patients used to always need a "second opinion".
Post COVID'19 patients only listen to the advice of the healthcare practitioners and Doctors also focus on avoiding Negligence.

An outcome of COVID'19 on the healthcare workers is the problem of burnout in the paramedical staff and doctors. WHO has considered burnout as a syndrome with "Occupational phenomenon"[45]

Medical representatives now need to change their game of going to doctor to doctor with their visual aids and focus on innovations and evidence based research to grab the attention of doctors without burdening them.
As per the UCPMP guidelines, gifts to doctors is strictly prohibited and is ethically incorrect[6]

"Thus, brands must now change the way they brand and promote their products as consumers are more informative and customers want evidence results."

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[4] https://www.who.int/mental_health/evidence/burn-out/en/
[5] https://drive.google.com/file/d/18lGPavLz7y4PaNARlYMUlp7HzlLznRyd/view?usp=sharing [primary research]
[6] http://www.nishithdesai.com/fileadmin/user_upload/pdfs/Research_Papers/Uniform-Code-for-Pharmaceutical-Marketing-Practices_Decoded.pdf

Brand Evaluation & Consumer Decision Making

Brands must now evaluate the **Customers need** and change their brand management strategies to adapt and conquer the market.

For example, For a brand like Dabur whose leading product is Chawanprash sees 7-fold jump in sales as demand for immunity boosting items booms amid COVID-19[7].

The market is amalgamating the benefits of AYUSH i.e. traditional methods along with the surge of innovation and research to overcome the pandemic.

Thus, Dabur did not stop at the traditional immunity booster, but also did a brand extension and **launched a new product** , the Dabur **Veggie wash,** a fruits and vegetables washing liquid to remove Germs, Bacteria and Fungus, with assurance of 100% safety. A **product** is made by a company and can be purchased by a consumer in exchange for money while brands are built through consumer perceptions, expectations, and experiences with all products or services under a brand umbrella[8]

Brand Evaluation and Perception by customers post COVID'19[9] with an example of the Veggie wash by Dabur

Components	Functional/ Utilitarian	Symbolic/ Expressive
	Washing vegetables	100% Safe
Evaluation of brand	**Rational & Practical**	**Emotional evaluation**
	Clean food void of virus	Care for family's health
Perception about company and product	**History & values Effectiveness, & Reliability of product**	**Ingredients Social approval**
	1884 founded, FMCG most valuable personal care brand. Veggie wash helps keep fruits and vegetables fresh With 100% safe ingredients	The solution is chlorine free, alcohol free and soap free which helps keep the fruits and vegetable naturally fresh and healthier for consumption. It gives a hygienic shield to the fruits and vegetables
Benefits	**Intrinsic**	**Extrinsic**
	Reduced risk of Virus	Prevention of spread of virus in community

Thus , consumers decision making process is changing from **"Curative"** healthcare to **"Promotive & Preventive"** healthcare.

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[7] https://www.financialexpress.com/industry/dabur-says-7-fold-jump-in-chyawanprash-sales-as-demand-for-immunity-boosting-items-booms-amid-covid-19/2039864/

[8] https://aytm.com/blog/brand-product-difference/

[9] Strategic Brand management by Kirti Dutta

For **Prescription drugs ,** the customers are Healthcare practitioners (Doctors).
Their decision making process for selecting a brand is clearly based on various factors such as
- Disease
- Product form, ingredients
- Mode of consumption
- Efficacy and Effectiveness
- Long term side effects
- Effective pricing model
- Evidence based research
- Alternatives available
- Brand Image etc

When a doctor has to make a decision to buy a brand[10], here are the following stages:

Stage	Components	Influencing factors
Inputs	Medical rep with Visual aid such as brochures , PPTs Keeping 4Ps in Mind	Brand equity Trust and reliability (data) Past experience
Process	Need Identification Information transfer Evaluation of Alternatives	Patient experience Life cycle stage Pricing model Brand Perception Industry analysis
Output	Prescription Post prescription feedback	Brand Loyalty Satisfaction/ Dissatisfaction

Post COVID'19 , it has become crucial to analyse and form branding strategies to sustain the competitive market.
Here are a few ways to do that:
- Always follow up and collect feedback from the loyal doctors
- Continuous R&D to gain a competitive edge , Big data analysis can be used for conducting clinical trials.
- Avoid false claims
- Keep the communication short and crisp for easy understanding
- Use visualisation techniques etc

For B2C Strategies various channels (mentioned under communication and channels) can be used.

Strategic brand-building and management process[11]

Stages	Components	Example (Glenmark pharmaceuticals)

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[10] Strategic brand management- Kirti Dutta
[11] Strategic brand management model- Strategic brand management by Kirti Dutta

Internal company analysis	Vision, Mission SWOT analysis Brand Image	Our core values ensure that, while we pursue solutions to serious medical problems with breakthrough technology, we do the right thing at all times. [12]
External audit	PESTLE, Porters's, Competitor analysis, Customer analysis, Suppliers and substitutes	Glenmark Pharmaceuticals top competitors include Clementia Pharmaceuticals, ProtoKinetix, DBV Technologies and Cord Blood America. [13]
Identify opportunities	COVID'19 Drug	Glenmark launches COVID-19 drug after DCGI nod[14]
Design	Product	Benefits and ingredients
Brand Value proposition	Benefits to the customers	Cases in India are spiralling putting a tremendous pressure on our healthcare system .An effective treatment such as FabiFlu will considerably help assuage this pressure, and offer patients in India a much needed and timely therapy option[15]
Marketing strategy	Product, Pricing , Place , Promotion strategy Channels	DCGI approval, Hospitals and doctors, Government hospitals, B2B marketing
Brand Meaning	Image (and Identity over time)	Identity prism analysis
	Personality "Achievement oriented, Respectful and Knowledgeable	Aaker's brand personality traits: -Reliable -Secure -Leader
Measure brand performance	Financial and customer based measures	Set KPI's for Medical representatives, Analyse customer recovery rate, take doctor's feedback etc.
Grow and sustain the brand	Brand extension strategies	Glenmark introduces higher strength of FabiFlu to reduce pill burden of Covid-19 treatment

Thus, the brand image is what a brand currently is and brand identity id what a brand should ideally stand for. Strategic planning is essential to create a brand; it's image, personality and maintain it's identity.

[12] https://glenmarkpharma-us.com/about-us/our-fundamentals/
[13] https://craft.co/glenmark_pharmaceuticals/competitors
[14] https://health.economictimes.indiatimes.com/news/pharma/glenmark-launches-covid-19-drug-after-dcgi-nod/76480996
[15] https://timesofindia.indiatimes.com/india/glenmark-introduces-higher-strength-of-fabiflu-to-reduce-pill-burden-of-covid-19-treatment/articleshow/77391069.cms

Brand Identity Prism [16]

Kapferer (2009) categorized brand identity into six dimensions which may be represented by six faces of a 'hexagonal prism'. The brand identity prism for **Savlon** is as follows:

Essence	Externalization (The social face)	Internalization (The brand spirit)
Brand Source	**Physique** Plastic bottle Doesn't sting on application	**Personality** Prevents infection Cures mild cuts, burns Strong antiseptic
Enabler (To bridge the gap	**Relationship** Functional and emotional Protects loved ones	**Culture** Superior composition allows action Promotes healing Prevents infection
Recipient	**Reflection** Image of loving and caring mother Prime concern is to protect her family	**Self Image** Heals cuts and bruises in the family

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[16] Kapferer2009 (book :Strategic brand management: Kirti dutta)

Communication & Channels

Healthcare marketing works differently than FMCG marketing and has to follow certain rules and regulations, guidelines
Prescription drugs cannot be advertised,

Pharmaceutical selling	FMCG selling
Safe formulations with medicinal	Used by consumers everyday
Highly regulated market	Not regulated
Available at retail drug stores & pharmacies	General stores
Require a Rx	Do not require an Rx
Consumer and customer are different	Consumer may be a customer

Pharma and Medical devices marketing takes place using Medical representatives.
But due to lock down, social distancing and Work overload, will doctors have the time to meet MR's?

Various communication channels include
- Advertising : For OTC products
- Personal Selling : For Doctors and Hospitals
- Sales Promotions : COVID'19 Kits
- Events and Campaign marketing : Online Webinars is the way
- Publicity : Creating campaigns for the general public, awareness and precaution videos etc
- Internet Marketing : For E-commerce websites and OTC products

The solution is Digitization. Denial of the past, the desire of the moment, the basic necessity of the future – That's Digitization. For the healthcare industry "How to meet doctors and remind them of our brand?" Here are the 5C 's of the COVID Pharma marketing

1. CORRECT YOUR CONTENT More than 95% of the content in pharmaceutical marketing in India that a company till now generated was limited to visual aids, monographs, literature mainly followed by a few AV films and physical webinars. Content consumption in BC was more in the closed cabin of a doctor. Being optimistic, you will agree that the readership of a new product monograph was far less than 20-30% for new products. "Me-too" or older brands were more dependent on one to one sale or reminder as a pillar of promotion. If we now shift the same content on digital, we have a gamut of possibilities. Content actually can be anything from Blogging, Video, Podcasting, Infographics, Email, Visual content, eBooks, Slide share presentations, Quizzes/tools, Checklists, Courses, Webinars, Slide decks, Social media posts & influencer marketing/surrogate representation are some of the forms of CONTENT on digital.

2. CUT THE INCORRECT A practising healthcare professional who's voice share has credibility will never endorse any brand publicly. A doctor is spending additional time justifying his knowledge better than google. So, the new role here for any marketer will be to steer the correct content .

3. CAUSE & CONTEXT In general, brand-related conversions are the building blocks of brand image. A "cause and context" associated with a brand is a necessary ingredient in our digital plan for our brands. A brand for asthma instead focusing on medical benefits, directly spoke of overall tension-free lifestyle which is a concern to the asthma patient. All people (be it doctors, patients, chemists or your own team) love cause and context. It's here you can drive a strong story in the brand messaging. The conversations on

digital happen only in 3 emotions, namely FEAR, ANGER, or HOPE. It will be the backbone of the sustenance of your content online and will carry a "viral ability" factor as well.

4. CONTROLLED AND CONSISTENT SEOs We already know, as much as 95% of Google users do not move beyond the first page of search results. Now you have created good engaging content, you have curated it, you have added good cause and context and also you update it timely for digital presence. What if your work doesn't show up as first 10 results in google search? The main aim of the search engine optimization (SEO) is to get more traffic from diverse sources and to get repetitive visitors. As a pharma brand manager, you may be intending to associate an indication or wanting to own a therapy segment or capture the doctors mind to strongly associate your brand vis-a-viz an indication. Every minute, 3.8 crore messages on WhatsApp are sent and Google answer 37 lakh searches across the world. SEOs play a vital role. SEO goes hand-in-glove planning with content development. The new role would also be related to how well you enhance the SEO drives.

5. CRISIS PLUGINS : The world will again have new BC and AD. Before COVID'19 & After Digitization Apart from availability, variety of queries and raised. Be it on "efficacy" or "comparison" or even discounted prices.

While pharmaceutical companies have long been the target of public mistrust and negative media attention the links and miscommunication loops were hidden entrenched. With the majority of the industry embracing the social media & digital platforms, there is a fair chance of negative flares cropping up. Why? Because the content that used to be in bags of medical representatives in the form of visual aid or literature will now be in public domain. Brand pages, social media handles and pages will surely be created. Earlier, where a pharmaceutical company used to be a faceless organization for a patient will now get touchpoints. As we all know a satisfied customer is the best advertiser, in the digital world its reverse. A dissatisfied customer can negatively impact the brand 10X level with bad reviews. Many of pharmaceutical clients who are on digital some way desire to disable the comment section to avoid negative comments as mentioned by a digital expert recently. As pharma marketers, when we want to use digital media outreach to a large number of doctor but not ready to listen to the voice of the customer is a "suicidal" behaviour. I would rather call it -an opportunity to build brand sensitivity. Several e-retail researches show that more than 3 negative reviews/traces on a brand is enough for a potential customer to not buy it. These will surely invite to a lot of unexpected crisis of various contexts for pharmaceutical as well. Marketers need to carryout crisis plug-ins in such situations. Crisis, I don't denote here as a problem per se. But it's an important alert point to reach out to the customer. For one important reason is that in Crisis, people forget fast but they remember how the company reacted or they were attended to. Marketers/brand managers need to learn the art of crisis plugins and be ready that unlike earlier times, it won't be once in a blue moon complaint mail from a consumer is received. Possible, that you may get queries daily for help or distress. Marketers should understand that "Crisis Plugins" is a brilliant opportunity to strengthen a brand image. [17]

Marketing professionals have been advised to wear masks and gloves, carry hand sanitisers and follow social distancing during work. Moreover, they have been advised to meet only willing customers. Doctors are preferring to get information like medical updates, new treatment regulations, guidelines and all companies involved in manufacturing through online communication. They are increasingly getting comfortable with remote reach as they do with patients and caregivers.
As a result, it's a good time for pharma to try and master alternative reach outs to doctors. It seems imminent that the role of medical representatives post COVID-19 will see a transformation from its traditional practice.[18]

[17] **https://medicaldialogues.in/editorial/5cs-induced-by-covid-in-pharmaceutical-marketing-65411**
[18] https://www.expresspharma.in/marketing/covid-19-impacts-pharma-marketing-digital-outreach-grows-popular/

Future Ahead

As per frost and Sullivan , a healthcare market analyst firm, these are the top predictions for the Global healthcare industry post COVID'19 Era[19]

2020 will be an unforgiving but transformational year for the healthcare industry

1. **The Kingdom of Saudi Arabia (KSA), United Arab Emirates (UAE) and Indian telehealth markets have reached a tipping point with growth of more than 200 percent during the pandemic**. Virtual consultations by healthcare professionals will become the mainstream care delivery model post-pandemic. However, reimbursement, training physicians, and platform scalability will be the key to recalibrating telehealth.

2. **Informatics and artificial intelligence (AI) solutions addressing workflow automation and operational analytics will witness 100 percent growth in 2020.** For instance, GE Healthcare's industry-first, FDA-cleared Critical Care Suite AI tool will help radiologists prioritize critical cases. The resumption in imaging for the backlog of elective procedures in Q3 and Q4 will result in teleradiology and AI-based solutions gaining from new investments. Scale-up in capacity, flexible payment options, and redistribution of the workload will accelerate partnerships.

3. **The United States will have an excess of 100,000 ventilators, while Western Europe will purchase another 30,000 to 50,000** ventilators through the end of 2020. This uneven distribution across regions will redefine non-hospital and home critical care models, while embedded analytics systems will revive the mature monitoring devices segment post-pandemic.

4. **Traditional models of in-vitro diagnostics (IVD) testing in a healthcare setting are unable to meet unprecedented demand**. By the end of 2020, the $5 billion point-of-care testing for the infectious diseases market will drive the impending change in service models, with alternate testing sites like pharmacies becoming permanent ecosystem participants.

5. **By the end of 2020, 33 percent of global clinical trials will be disrupted**, putting $3 billion in new product revenues at risk. Disrupted clinical trials and the subsequent delay in drug launches will pave the way for fully virtual trials, and hybridization of patient recruitment, retention, and monitoring will become all-pervasive.

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[19] https://www.dicardiology.com/content/top-5-predictions-global-healthcare-industry-post-covid-19
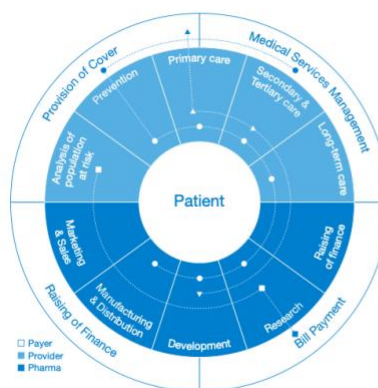
Conclusion

The Lancet defined health as 'the ability of a body to adapt to new threats and infirmities'. This definition is especially relevant today as the world combats one of its biggest transformative challenges, the COVID'19 Pandemic

The future trends to gain traction are as follows:

- Wearables, smart devices and MedTech apps will gain traction. The GOI app for COVID'19 "Arogya Setu" is a brilliant example of the same
- Integration of Traditional and Modern methods such as AYUSH and Modern allopathic will help Indian brands become Market Leaders in the healthcare industry
- Mental Health, Wellness are the upcoming targets in the future for Healthcare brands
- Occupational Health , Burnout is the new upcoming Pandemic [20]
- Telemedicine and Digital health platforms are here to stay and grow at a really fast clip
- Implantable inserted under the skin to monitor the patient's vitals such as temperature, Blood pressure, Oxygen and glucose will help gain real-time data
- Implantable pills will allow release of medicines into bloodstream in monitored does
- Artificial Intelligence and be used to leverage big data models for pattern recognition, interpretation and prediction using Machine learning.
- Data can assist in analysing the social economic and demographic changes
- Robotic surgery, Automation will boom with cost effective solutions
- Health Tourism will abate. Instead doctors will fly resulting in reduction of unnecessary travel of patients, and their attendants.
- Health insurance will cover less, but cost more…Unless Ayushman Bharat reaches every household leading to universal health coverage
- Lines will blur between Insurance companies and Physician Practices by using claims data, analytics and tools to help make better decisions. [21]

Figure 6: By 2020, the pharmaceutical, payer and provider value chains will be much more closely intertwined

Changes in epidemiology will influence the need for healthcare funding & Pharma's research priorities. Payers, providers & Pharma will collaborate on epidemiological studies.

Payers will shift to outcomes-based pricing. Pharma will collaborate with payers and providers to determine which of the medicines in its pipeline really add value and can thus command the premium prices it needs to maximise its return on investment.

Payers, in consultation with the medical profession, will issue clinical guidelines. They will also give providers incentives to prevent & manage disease, as distinct from treating it. Pharma's focus will shift to the development of cures and healthcare packages for helping patients comply with their medical regimens and manage the diseases from which they suffer more effectively.

Source: PricewaterhouseCoopers

Will Healthcare brands adapt to the new normal and will the new normal be permanent? That is the question.

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[20] https://brandequity.economictimes.indiatimes.com/news/marketing/future-shock-25-health-wellness-trends-post-covid-19/75859294

[21] https://www.pwc.com/gx/en/pharma-life-sciences/pdf/ph2020-marketing.pdf

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The book Strategic Brand management by Kirti Dutta has provided me extensive personal and professional guidance and taught me a great deal about both branding and strategies in general.

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Method of Primary Research:

A survey of 500+ healthcare nursing staff in Kokilaben Dhirubhai Ambani Hospital to understand the level of Burnout in hospital staff.

Thank you

Any Questions?
Ira Kaushik
9821079634