

Indian Healthcare and Social Media Marketing: A Gap Analysis

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Abstract

With the advent of chat sessions, instant messengers, special interest communities, blogs and wikis, the consumer seeks web intervention in any decision making process. The same has been observed for the Indian Healthcare Industry. Here the participants share their knowledge and experiences to solve problems and also feel responsible towards each other. In the high involvement healthcare sector, patients are increasingly seeking online advice and information to satisfy themselves before indulging into any sort of treatment. The purpose of this paper is to study the existing literature on Indian healthcare industry which would enable better understanding of the role of Social Media Marketing in Healthcare industry. This paper adopts the literature review method and gathers data from more than 100 research papers, online reports, and articles. The secondary data collected is analysed and the most relevant findings are assimilated to analyse the prevailing gaps and scope of further research. The data analysis highlighted several gaps in the healthcare industry namely, 'Absence of Patient Profile', 'Behavioural Aspects', 'Need for tailor made healthcare interventions', 'Digital Channel Development', 'Use of ICT (Information and Communication Technology) in Healthcare'. The data presented inadequacy of work on the relationship between Service Quality and Patient Orientation. In addition Demographic, Psychographic and Behavioural studies of healthcare social media users are limited.

Keywords: Healthcare, Social Media Marketing, Hospital Marketing, Gaps in healthcare

Introduction

IBEF reports that the healthcare industry primarily functions through five different segments – hospitals, pharmaceuticals, diagnostics, medical equipment and supplies, medical insurance, and telemedicine. Healthcare has become one of India's largest sectors both in terms of income and employment. The industry is growing at an incredible pace owing to its strengthening coverage, services and growing expenditure by public as well private players. By 2020, the market is expected to record a CAGR of 17%. The total industry size is expected to touch USD 160 billion by 2017 and USD 280 billion by 2020 (IBEF, 2016). Marshall et al. (2000) opine that the healthcare consumers are expected to actively make informed choices for healthcare providers (such as hospitals), treatment options or health plans. The fundamental assumption is that by selecting high-quality providers against

competitive prices, consumers can help create an efficient and patient-centered healthcare system. In addition, as per Hibbard et al. (2003) there is increased emphasis on transparency in quality of healthcare, consumers are exposed to comparative healthcare information, i.e. information about the quality of different healthcare providers. A record number of players competing in the healthcare landscape are mushrooming from the private sector as against traditional government set-ups.

The private sector has emerged as a strong force in India's healthcare industry, lending it both national and international repute. Large investments by private sector players are expected to contribute significantly to the development of India's hospital industry, which comprises around 80 percent of the total market. In India, private healthcare books for almost 74 percent of the country's total healthcare expenditure (IBEF, 2015). Private sector's share in hospitals and hospital beds is estimated at 74 percent and 40 percent, respectively. In a recent editorial, Forsberg et al. (2011) drew attention to the "major role in financing and provision" that the private sector plays in low- and middle-income countries, and went on to state that private health sector research has moved beyond classifying and counting providers and users, to the assessment of mechanisms for harnessing the private sector and identifying conditions for their successful application.

Literature Review

E-Health and the Role of Social Media in Healthcare

Eysenbach (2001) discourses that eHealth is a developing field in the intersection of medical informatics, public health and business, referring to health services and information delivered or enhanced through the internet and related technologies. In a broader sense, the term symbolizes not only a technical development, but also a state-of-mind, a way of thinking, an attitude, and a commitment for networked, global thinking, to improve health care locally, regionally, and worldwide by using information and communication technology. Peck, JL (2014) refers to social media as internet-based tools that allow individuals and communities to come together to share information, ideas, personal messages, images, and other content; and, in some cases, to collaborate with other users in real time. Social media sites may include blogs, social networks, video and photo-sharing sites, wikis, or a numerous other media, which can be grouped by purpose, serving functions such as social networking (Facebook, MySpace, Google Plus, Twitter), professional networking (LinkedIn), media sharing (YouTube, Flickr), content production (blogs-Tumblr, Blogger and microblogs-Twitter), knowledge/information aggregation (Wikipedia), virtual reality and

gaming environments (Second Life) and more. Grindrod et al. (2014) also contemplate that multiple social media tools are available for health care professionals (HCPs), including social networking platforms such as, blogs, microblogs, wikis, media-sharing sites, and virtual reality and gaming environments. According to Farnan et al., (2013) these tools can be used to improve professional networking and education, organizational promotion, patient care, patient education, and public health programs. However, they also present probable risks to patients and HCPs regarding the distribution of poor-quality information, damage to professional image, breaches of patient privacy, violation of personal-professional boundaries, and licensing or legal issues etc. According to a Forbes article, the social media sites are good sources of information for patients and physicians and can even promote clinical trial enrollment. Most clinical trials use a large percentage of their budget and staffing for patient recruitment and enrollment—enrollment is usually the largest barrier to success in clinical trial work (Forbes, 2016). Social media can also help with spreading the word about a particular trial and connect patients with trial personnel. Once enrolled, social media can be used for updates for subjects as well as investigators leading to generation of loyalty.

The objective of the paper is to explore the research undertaken for Healthcare Industry, Services Industry and the role of Social Media Marketing in healthcare management explaining the research conducted hitherto with the purpose of identifying the gaps in the existing literature. The authors of the paper attempt to analyze the gaps that exist in the Healthcare Industry pertaining to Social Media Marketing. In order to comprehensively understand this aspect the authors appraised literature under three sections:

- The Healthcare Industry
- The Services Industry and
- Social Media Marketing in Healthcare Industry

The current literature in healthcare is narrow and is not exhaustively explored. The nature of studies conducted so far is majorly related to either Service Quality, Patient Satisfaction, Patient Loyalty or a combination of these attributes. The emergence of 'Social Media Marketing Impact on Healthcare' is a relatively novel concept and thus restricted research is available in this domain. This paper outlines prior studies carried out in a tabular form (Table I, II and III). The documented work (Table I) attempts to investigate the impact studied, methodology used and the outcomes of various studies pertaining to the Healthcare Industry.

Table I: Review of the previous studies related to the Healthcare Industry

SNO.	DOCUMENT TYPE	PURPOSE	METHODOLOGY	OUTCOME	SOURCE /AUTHORS
1.	A marketing perspective to “delight” the “patient 2.0”: new and challenging expectations for the healthcare provider	Investigating the characteristics and the satisfaction determinants of the emerging patient profile.	Performed Semi-structured interviews and focus groups on a random sample of 2808 Italian citizens-patients	<ul style="list-style-type: none"> Healthcare organizations are not fully developed according to patients’ emerging needs. Technology is a facilitator especially for younger people and hence, care providers should take advantage of the opportunities offered by ICT applications to simplify processes and bureaucracy. Digital communication channels as emails or virtual communities are perceived by the “patient 2.0” as an effective way to get support and information. 	Luca Buccoliero, Elena Bellio, Maria Mazzola and Elisa Solinas (2016)
2.	Online Research Report, IBEF	To study the Indian healthcare sector	Compiled data from various researches	<ul style="list-style-type: none"> Healthcare market to rank among top 3 by 2020 with high CAGR growth. Demographics will boost the healthcare services demand. 	Retrieved from www.ibef.org in September (2016)
3.	Measuring patients’ healthcare service quality perceptions, satisfaction, and loyalty in public and private sector hospitals in Pakistan	The purpose of this paper is to explore the relationship between healthcare perceived service quality (HCSQ) and patient loyalty.	Gathered Sample of 600 respondents using stratified random sampling technique from inpatients of public and private sector hospitals	<ul style="list-style-type: none"> Healthcare perceived service quality has a significant positive effect on patients’ loyalty. Patient satisfaction also mediates the relationship between HCSQ and patient loyalty. 	Asma Shabbir, Shaha Alam, Malik, Shujah Alam Malik (2016)
4.	Direct to Consumer Marketing: A Complementary approach to traditional dissemination and implementation efforts for mental health and substance abuse interventions	The purpose is to study the Direct to consumer marketing based on the concept of Push v/s Pull strategy related to HC.	Appraised literature for over 50 papers from 2004-2015	<ul style="list-style-type: none"> Traditional studies have focused on relationship b/w treatment developers & providers however study on DTC marketing which leads to Pull strategy is limited. 	Sara J. Becker (2015)

5.	Research Paper	Understanding the role of patient adherence in successful health treatment.	Compiled data from various researches	<ul style="list-style-type: none"> • Patient adherence requires tailor made interventions to suit unique characteristics of patients, disease conditions and treatment regimen. 	Leslie R Martin, Summer L Williams, Kelly B Haskard, and M Robin DiMatteo
6.	Dimensions of hospital service quality: a critical review: Perspective of patients from global studies	The purpose of this paper was to review the service quality dimensions established in various studies conducted across the world specifically applied to HC.	Appraised literature for over 45 papers.	<ul style="list-style-type: none"> • HC service characteristics similar to other services are : Demand for service, Inseparability, Perishability, Knowledge disadvantage. • HC service characteristics dissimilar to other services are : HC is a need service, Lack of Control, Confidentiality surrendered , labor and skill intensive, tailor made, Collaboration between HCP and patient. 	Yogesh P. Pai Satyanarayana T. Chary (2013)
7.	Determinants of patient choice of healthcare providers: a scoping review	Finding out the determinants of patient choice of Healthcare Provider.	Compiled data from various researches	<ul style="list-style-type: none"> • Patients' choices are determined by a complex interplay between patient and provider characteristics. • Variety of patient characteristics determines whether patients make choices, are willing and able to choose, and how they choose. 	Aafke Victoor1*, Diana MJ Delnoij2,3, Roland D Friele1,2 and Jany JDJM Rademakers (2012)
8.	Does patient satisfaction affect patient loyalty?	Does patient satisfaction affect patient loyalty?	Appraised literature through various sources, data from 678 hospitals were matched using three sources	<ul style="list-style-type: none"> • Patient Satisfaction leads to Patient Loyalty 	Daniel P. Kessler Deirdre Mylod (2011)
9.	The Lure of Patient Choice	The agenda of this paper is to throw light on the possibility of providing options to attract patient's choice of HCP.	Studied literature across several years with over 30 papers	<ul style="list-style-type: none"> • Growing importance of patient involvement in healthcare decision making. 	Louise D Bryant, Nicola Bown, Hilary L Bekker and Allan House (2007)

10.	The birth of Healthcare Consumer : Growing demands for choice, engagement, and experience	Studying the US population perspective on healthcare system.	Segmented Consumer Survey according to demographics	<ul style="list-style-type: none"> • Young consumer wants to hear from their healthcare providers through digital channels, outranking traditional facility visits or phone calls; embrace the idea of healthcare delivery via virtual marketplace. • HCP can distinguish themselves by Consumer Choice, Consumer Engagement or Consumer Experience 	Strategy&
11.	Hospital Advertising: The Influence of Perceptual and Demographic Factors on Consumer Dispositions	The purpose is to study the influence of perceptual and demographic factors on consumer dispositions	Administered Open ended questionnaire with 20 respondents, and in phase 2, administered a structured questionnaire to 30 respondents.	<ul style="list-style-type: none"> • Informative advertising lead to confidence and favorable perception building of actual and potential clients • Better educated are more likely to make their own decisions in choosing hospital services. • HCP should pay more attention to consumers' feelings, attitudes, and perceptions. 	Syed SaadAndaleb, (1994)
12.	Sustainability in the health sector	The purpose of the paper is to do descriptive study on the sustainability of health sector.	Appraised literature through various sources, data from over 40 papers.	<ul style="list-style-type: none"> • Poor Service Quality in Public sector → Greater use of private HCPs 	Guldner and Rifkin. (1993)

Gaps in the Healthcare Industry

- The research shows that Demographics boost the healthcare services demand. But, no research work studies the Indian Demographic Segmentation to better understand their impact on the Healthcare Industry.
- Studies prove that patients stick to their treatment plans if there is an intervention from the HCP. It has also been evidenced that patients need ‘tailor made’ healthcare services for better adherence to the treatment plans. However the current literature throws no light on the ways of designing ‘Tailor made intervention plans’ for the patients.
- According to researches, there is a need of developing digital channels to be connected to patients in a more effective manner. Yet, research with respect to the type of digital platforms, the ways in which they will be used and, their impact on patients is scarce.
- There is literature related to the importance of Patient Choice, Patient Engagement, and Patient Experience and the need of HCPs to work hard to strengthen these

aspects. However, limited research is available on the ways to achieve these aspects and to study their repercussions for the HCPs.

- Some literature dealing with healthcare mentions the need to take advantage of opportunities offered by Information and Communication Technologies (ICT) applications to simplify their processes and building patient relationships. Nonetheless, literature available on the topic is scarce.
- Research illustrates the need to pay attention to Consumer’s feelings, attitudes and perceptions. Studies assessing the same are limited and need to be more extensive.
- Literature demonstrated the need to study Direct to Consumer (DTC) advertising which would lead to Pull Strategy. Conversely, the amount of literature available is insufficient and demands to be explored more.

The documented work (Table II) throws light on the Service industry and attempts to draw meaningful inferences which find applicability in the healthcare services.

Table II - Review of the previous studies related to Services Marketing

SNO.	DOCUMENT TYPE	PURPOSE	METHODOLOGY	OUTCOME	SOURCE /AUTHORS
1.	Measuring patients' healthcare service quality perceptions, satisfaction, and loyalty in public and private sector hospitals in Pakistan	The purpose of this paper is to explore the relationship between healthcare perceived service quality (HCSQ) and patient loyalty.	Gathered sample of 600 using stratified random sampling technique from inpatients of public and private sector hospitals	<ul style="list-style-type: none"> Healthcare perceived service quality has a significant positive effect on patients' loyalty. Patient satisfaction also mediates the relationship between HCSQ and patient loyalty. 	AsmaShabbir Shahab Alam Malik ShujahAlam Malik (2016)
2.	Developing a HospiSE scale for hospital service excellence	This empirical survey research aims to identify the dimensions of service excellence culture for hospitals	Developed structured questionnaire after literature review and focus groups discussions. Administered questionnaire from 1558 respondents. across public and private hospitals in Malaysia	<ul style="list-style-type: none"> Patient Orientation identified as one of the 3 major dimensions of measuring Service Excellence Culture for hospitals. 	Boo Ho VoonFirdaus Abdullah Nagarajah Lee Karen Kueh , (2014)
3.	Dimensions of hospital service quality: a critical review: Perspective of patients from global studies	The purpose of this paper was to review the service quality dimensions established in various studies conducted across the world specifically applied to HC.	Appraised literature for over 45 papers.	<ul style="list-style-type: none"> HC service characteristics similar to other services are : Demand for service, Inseparability, Perishability, Knowledge disadvantage HC service characteristics dissimilar to other services are : HC is a need service, Lack of Control, Confidentiality surrendered , labor and skill intensive, tailor made, Collaboration 	Yogesh P. PaiSatyanarayana T. Chary , (2013)
4.	An experimental study of service recovery options	The objective of this paper is to study the Service Recovery Options.	Appraised literature for over 50 papers.	<ul style="list-style-type: none"> Negative WOM can cause \$6000-\$400,000 worth of loss to HCP during patient's lifetime 	Strasser et.al. (1995)

5.	Conveying service quality through advertising	Exploratory study to understand how service providers attempt to communicate quality of their offerings to consumers through advertising.	Appraised literature for over 50 papers.	<ul style="list-style-type: none"> Competitors offer same service product, thus imperative to differentiate on the service delivery system. Customer perceptions drive their choice of providers. 	Ellen Day (1992)
6.	Linking Service Quality, Customer Satisfaction, and Behavioral Intention	The aim of this work is to study the relationship between Service Quality, Customer Satisfaction and Behavioral Intention of patients.	Conducted data through Telephonic surveys; total of 20 patients participated in 2 separated pretests.	<ul style="list-style-type: none"> Patient's perception of Service Quality greatly influences choice of HCP 	Woodside et. al. (1989)

Gaps in the Services Industry

- Studies prove that there is high similarity in the product and service offering with growing competition, which gives birth to the need to differentiate services on the basis of Service Delivery System. However rare instances of work are available which study the Service Delivery System with respect to Healthcare Industry.
- Patient Orientation is observed to be a major driver of Service Excellence culture for hospitals. This call for more research as the current work doesn't elaborate on the relationship between Service Quality and Patient Orientation.

- Contemporary research mentions the impact of Service Quality on choice of HCP and Patient Loyalty. It also shows the mediating effect of Patient Satisfaction on Service Quality and Patient Loyalty, yet there is limited literature on the means by which these relationships could be realized.

The documented work (Table III) attempts to investigate the impact studied, methodology used and the outcomes of various studies with special reference to Social Media Marketing in the Healthcare Industry

Table III - Review of the previous studies related to Social Media marketing in Healthcare Industry

SNO.	DOCUMENT TYPE	PURPOSE	METHODOLOGY	OUTCOME	SOURCE /AUTHORS
1.	The effect of advertising awareness on Brand Equity in Social Media	The purpose of this study is to seize the moment of using social media networks to create brand equity and also explore its challenges to	Created a model on the basis of literature study and checked by SEM analysis with a sample of 273 respondents.	<ul style="list-style-type: none"> Advertising awareness positively impact brand awareness, brand image and brand equity. Marketing and Brand managers can create brand equity at Social media by focusing on the creation of awareness of advertising. 	Abdullah Awad Alhaddad (2015)

		draw the attention of those companies venturing into social media networks.		<ul style="list-style-type: none"> • Photos and video posts can create awareness by increasing the ability of buyer to recognize and recall advertising elements in social media. 	
2.	Social Media: How hospitals use it, Opportunities for future use	The purpose of this study is to examine the hospital characteristics associated with Social media use and hospital strategies for SM.	Studied Facebook and Twitter pages and posts and conducted analysis.	<ul style="list-style-type: none"> • Hospitals underutilize Facebook which provides considerable opportunity for consumer engagement at a low cost. 	Jason P Richter, Fort Sam Houston, Chrisanne E. A. Wilks (2014)
3.	Connecting to patients via social media: A hype or a reality?	The objective of this study is to check if the hospitals are using SM to friend, listen to and interact with their visitors.	Analyzed Content Content Analysis of 23300 posts and tweets was carried out on 172 US hospitals.	<ul style="list-style-type: none"> • Facebook is more popular than Twitter for Social media marketing of Healthcare in terms of consumer usage. • Hospitals use Social media for event announcements, sharing patient stories and holiday salutations. • Large hospitals are more proactive in responding to visitor posts and queries. 	Edgar Huang and Christina L Dunbar (2013)
4.	Using Social media to engage patients	To study the effect of brand awareness on brand choice	Article by author of Social media in Healthcare : Connect , Communicate and Collaborate	<ul style="list-style-type: none"> • E-patients engagement with HCPs providing opportunities for participation. • Mix of online and traditional sources for consultation • SM opportunities include : Blogs, Microblogs, Social networking sites, Pod cast-video cast, Widgets & Apps, Virtual world and Personalized avatars 	Thielst, Christina Beach, FACHE (2011)
5.	Social Media for healthcare makes sense	This work aims to throw light on the nuances of hospitals use of SM and why it makes sense for patients	Author designed paper on the basis of experiential writing	<ul style="list-style-type: none"> • Patients seek social media because they are scared or confused; help can be provided • Patients need care experience 	Chris Boyer (2011)

6.	Social Media and Health Care Professionals: Benefits, Risks, and Best Practices	Understanding the tools and uses of Social media in Healthcare	Compiled data from various researches	<ul style="list-style-type: none"> Social media sites and platforms offer the potential to promote individual and public health. When used carelessly, the dangers these technologies pose to HCPs are formidable 	C. Lee Ventola (2004)
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Gaps in Social Media Marketing in Healthcare

- The current research acknowledges the impact of Social Media Marketing in the healthcare sector but detailed study on Demographic, Psychographic and Behavioral aspects of the user group lacks literature.
- There is lack of literature on the emergence of eHealth and the concept of E-Patients. Current literature provides evidence of higher Facebook popularity in comparison to Twitter but other potential Social Media opportunities such as Blogs, Microblogs, Social Networking Sites, Pod-Casts and more have not been explored.
- The literature supports that HCPs use social media for giving away information and sharing experiences but the impact of the aforesaid social communication on existing and potential patients has not been researched upon.
- Research shows that patients demand care experience from the HCPs and seek social media’s support to satisfy their fear spasms and anxiety. However there is no research on the success of Social media in curbing anxiety and fear issues among patients.
- Currently, literature accolades Social media’s ability to promote individual and public health but throws no light on the way social media engagement would actually benefit health.

Discussion

Prior literature has acknowledged the role of Patient Awareness, Patient Engagement, and Patient Involvement in healthcare decision making. The research also focusses on the relationships between Service Quality, Patient Satisfaction and Patient Loyalty. The increasing importance of delivering quality service among HCPs facilitates patients to make purchase decisions. There is an unexplored opportunity for the HCPs to use Information and Communication Technologies to reach patients providing them with tailor made solutions and superior Service Quality. Recent literature has revealed that patients have started discussing healthcare online giving rise to the concept of eHealth and Patient 2.0. With new media landscape, patients are assimilating as well as disseminating information on the web, specifically on social media

network. The research has also substantiated that social media holds the potential to impact the purchase intention of a patient.

Implications

The healthcare industry is witnessing a change in the patients’ preferences, attitudes and beliefs. Implications of marketers have been suggested keeping into consideration the significance of the proposed market segment. The healthcare marketers need to promote through popular media channels such as social networking sites, healthcare websites, blogs, or web forums. These tools can be used to enhance professional relationship between healthcare professionals, and between HCPs and consumers of healthcare. This will not only create a positive perception but will also establish a bond of relatedness with the brand. However the marketers need to be careful of the potential risks to patients and HCPs regarding poor-quality information, damage to professional image, breaches of patient privacy, violation of personal–professional boundaries, and licensing or legal issues. Therefore the marketers can make use of this unexplored segment, channelizing it to be a profitable one.

Scholarly research on impact of Social Media Marketing on healthcare industry is conspicuously not evident. The current work will enable the research scholars in identifying the gap areas in Healthcare Industry, Services Industry and Social media marketing in healthcare. This will pave way for the researchers to explore research in healthcare in a more refined and directed manner.

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