



HOW UGANDAN TELEMEDICINE COMPANY **ROCKET HEALTH** GREW DURING THE COVID-19 PANDEMIC

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1. Introduction

Rocket Health, a telemedicine and digital health service in Kampala operated by The Medical Concierge Group (TMCG), has experienced significant growth through the first year and a half of the pandemic. Seven years into operations, some doubted the company's market potential because it is heavily reliant on digital literacy in a country where internet access is limited, and much of the population is not highly educated or exposed to modern technology.

However, the pandemic crisis created an opportunity for Rocket Health. During the pandemic, residents had their movements restricted amidst great uncertainty and anxiety about health. In this context, Rocket Health experienced a spike in their clientele, with more people seeking to access healthcare services through digital tools. As a result, Rocket Health services were significantly embraced in Kampala and the surrounding areas. This progress built on and went beyond to the known growth of mobile and technology adoption in Africa by extending telehealth services beyond the digital divide through strategic marketing and communications.

Due to the government efforts to curb the spread of COVID-19, most people were limited in their ability to travel to access healthcare, and by design Rocket Health served thousands of people through tele-consultations, home-based COVID-19 care, home COVID-19 testing, and delivery of pharmaceutical supplies. Even outside the occasional waves, this work has made Rocket health a household name in certain areas of Uganda.

1.1 Summary of Rocket Health Growth

At the height of the COVID-19 pandemic in Uganda, Rocket Health experienced unprecedented growth, which was reflected on both their online and offline platforms. Both the phone-in contact number and website 'E-Shop' saw growth in users, particularly at key times of the pandemic such as the first lockdown in the month of April 2020, and the most impactful wave of COVID-19 experienced by Uganda in June 2021.

From the period of October 2019 to September 2021, Rocket Health registered the following increases in business:

- * Amount of voice call traffic increased by 315%
- * Number of encounters from insured members increased by 344%
- * Users of the online shop (E-shop) increased by 331%

Visually, these increases are striking and demonstrate how the pandemic was a time of massive growth for the company. Below is a chart showing a year-on-year comparison of Rocket Health's increasing number of calls, insurance encounters and e-shop users.

Tele-Consultations Per Month 2019 - 2021

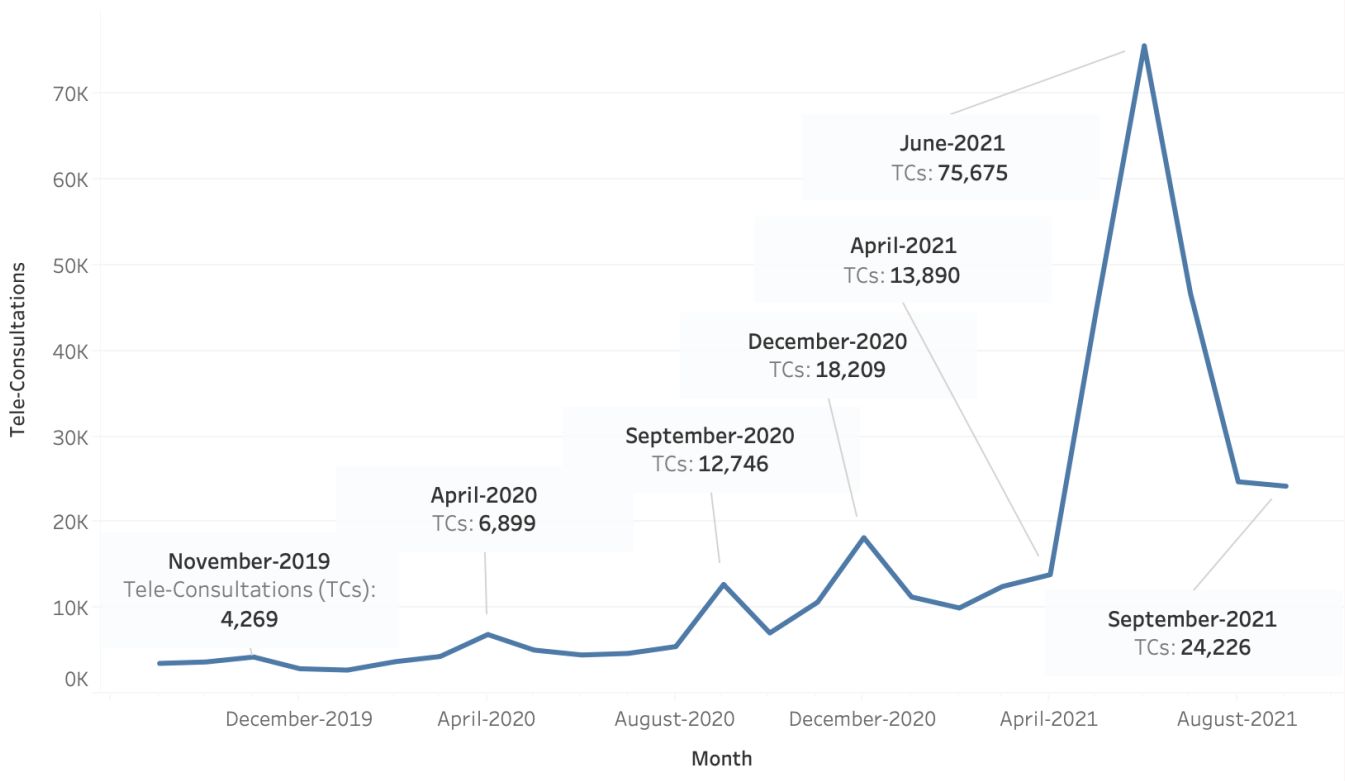


Figure 1: The number of customers contacting Rocket Health by phone (call or text) over a 2-year period shows an increase in customer demand over time, punctuated by spikes and drops that reflect the context of public health crises. Each wave of COVID-19 in Uganda saw an increase in tele-consultations, with a huge spike in demand during Uganda's worst wave of COVID-19 during June 2021.

E-Shop (Website) Visitors Per Month 2019 - 2021

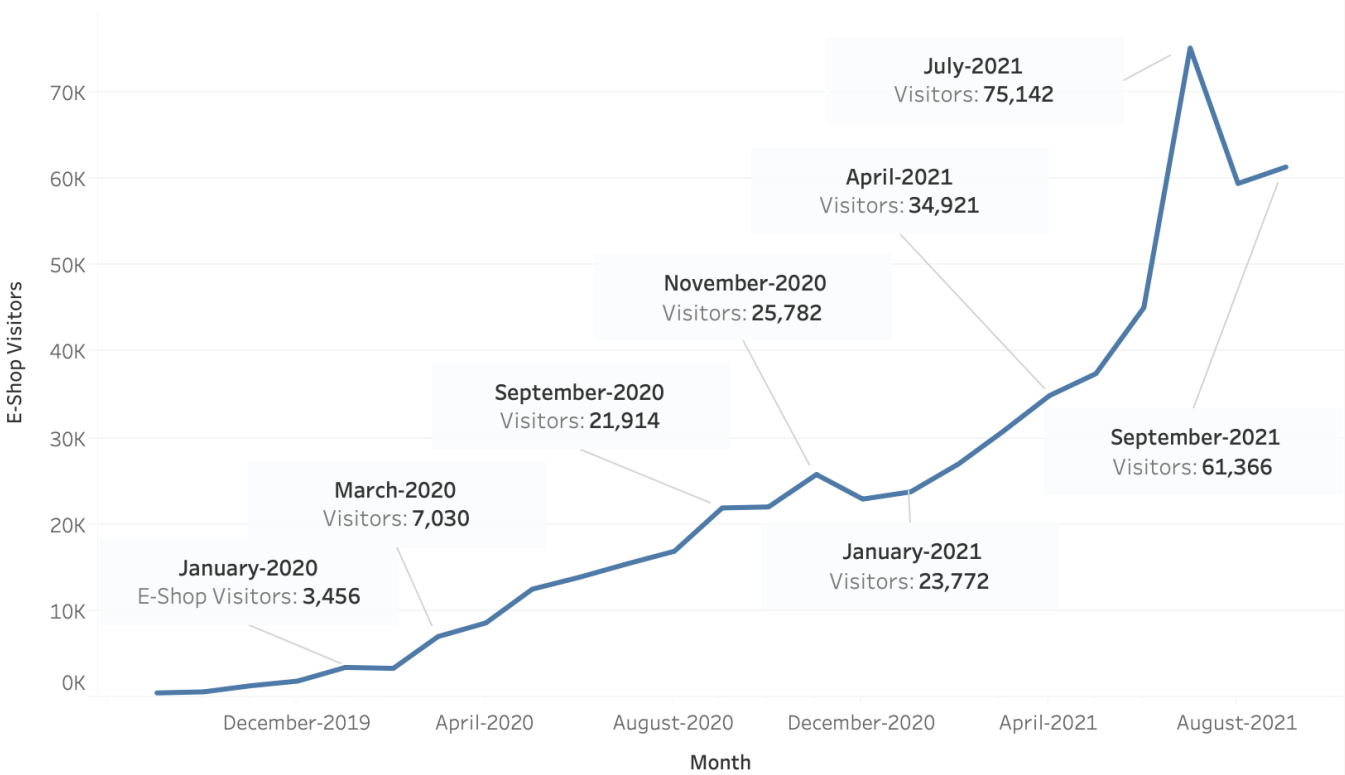


Figure 2: Rocket Health's E-Shop (website) saw a steady increase in use over time. Usage increased during COVID waves, but not as dramatically as Tele-Consultations, and usage did not reduce as much after each wave, suggesting that customers have developed more routine use of the E-Shop.

In the height of the COVID-19 pandemic in Uganda, Rocket Health experienced a spike in demand for services. This suggests a correlation between pandemic lockdowns and the adoption of telemedicine services in Uganda. The health crisis coupled with lockdown restrictions forced the market to take a leap, quickly change and adapt thereby increasing the demand for remote and accessible health services. While the months when lockdowns were imposed were associated with jumps in interest, the overall trend was an increase in use of Rocket Health services over time.

Deliberate marketing efforts from Rocket Health promoting the e-shop were no doubt also associated with the steady rise in website visits from 4,343 total e-shop visits in the third quarter of 2019 to 241,056 in the third quarter of 2021. The highest number of e-shop visits were 75,142 achieved in July 2021 when there was a running promotion on COVID-19 home packages on the e-shop.

Tele-consultations experienced their first spikes during the first countrywide lockdown in April 2020 when most people were in their homes, but needed medical assistance, and thus resorted to tele-consultations. The rise in e-shop visits and tele-consultations seemed loosely correlated, though didn't always change at the same rate. The highest level of tele-consultations overall was reached in June 2021, in the midst of another national lockdown and Uganda's most deadly wave of the pandemic.

Clearly the context of a pandemic and lockdowns favoured Rocket Health's business offering, but Uganda is not a country that easily accommodates technological innovation – due to limited connectivity and other market limitations – yet Rocket Health was able to find its market in part because of market research conducted by Whitehead Communications, as well as effective marketing activities by the telemedicine company.

2. 2020 Public Opinion Research on Telemedicine in Uganda

In August of 2020, the research team at Whitehead Communications carried out research on awareness of and public opinion on telemedicine in Uganda. The research objective was to ascertain to what extent Ugandans understood telemedicine and may be open to using such services. The team also gathered feedback from Rocket Health customers in Uganda with the intention of learning how the telemedicine provider could serve them better. This research was done through surveys and focus groups (more on the methodology below).

We surveyed 392 Ugandans about their views on Telemedicine, 37% of which were located in Kampala where Rocket Health is based, and the rest were spread across the country. Our findings suggested that while the majority (58%) had never heard of telemedicine, more (80% +) were open to the idea.

2.1 The Challenge of Healthcare in Uganda

In focus groups, the Whitehead Communications team asked Ugandans to describe their experience with healthcare in Uganda. Participants described a health system with services often distant from their homes, poorly resourced, and often expensive. This description spans both public and private healthcare. Furthermore, it was reported that there are often not enough doctors to meet patients' needs, and services in health care are often slow and frustrating.

Focus Group participants describing the Ugandan healthcare system



PARTICIPANT 1:

"Costly, inadequate and pathetic especially for the rural population."



PARTICIPANT 2:

"Terrible here in Kiruhura. The nearest is around 4km but the only health worker is alcoholic and thus not available to offer quick services."



PARTICIPANT 3:

"It's sluggish. Lacks quick action - for the Public sector. For the private sector - very capitalistic."



PARTICIPANT 4:

"Often times the prohibitive cost of a Doctor's visit is not what is charged as consultation (in the middle class) but the cost of commute and waiting. The fact that Rocket Health minimises this cost is a good selling point."

Figure 5: Four focus group participants describing the Ugandan healthcare system.

2.2 Demand for Health Services in Uganda

Among the Ugandans who understood what telemedicine is, whether they were an existing user or had just found out what it was, most respondents believed that it could be a good solution to their healthcare needs.

Focus Group participants describing the demand for health services in Uganda



PARTICIPANT 5:

"Telemedicine is good. Helps in case of emergencies that needs immediate feedback. And it's not expensive I guess. I never used though."



PARTICIPANT 6:

"I think Digital health is one of the ways third world countries will benefit from the global tech advancement. The thought that I can get access to quality services from the top

consultants makes me hopeful. The challenge is that the rural will still be disadvantaged. With low internet Penetration of about 35% and high cost of data and smart phones. Uganda has the highest internet cost in Uganda. Only the privileged can access with services."



PARTICIPANT 7

"I believe telemedicine is the future of healthcare. The fact that you can get a consult as you go along with your day, have medication delivered if required is so liberating." – Ugandan Focus Group participant, 2020.

Figure 6: Three focus group participants describing the state of the demand for health services in Uganda.

2.3 Benefits of Receiving Medical Assistance at Home

Most Ugandans we spoke with could quickly recognise the potential benefits of telemedicine services, whether or not they had experienced telemedicine services before.



PARTICIPANT 8

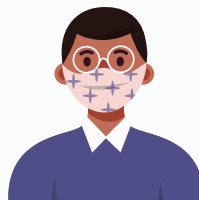
"Tele medicine has a market in Uganda... there is a generation of Ugandans who have become accustomed to services finding them in the comfort of their homes or offices and they are willing to pay."

Figure 7: Participant 8 speaking about the potential of telemedicine in Uganda



PARTICIPANT 9

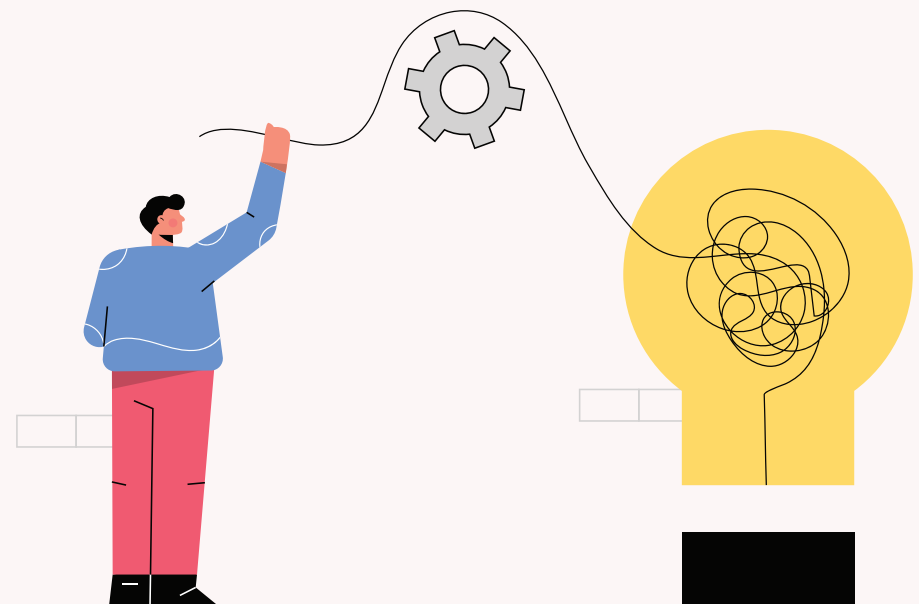
"Often times the prohibitive cost of a Doctor's visit is not what is charged as consultation (in the middle class) but the cost of commute and waiting. The fact that Rocket Health minimises this cost is a good selling point."



PARTICIPANT 10

"I was able to ask a lot of questions without fear, after all he couldn't see my face [...] I was able to get medication without moving an inch, complete my work but also have my health taken care of. Most times you have to sacrifice one for the other."

Figure 8: Participant 9 and 10 speaking about the potential benefits of telemedicine.



This sentiment was reflected in the key results of our larger market survey.

Focus Group participants describing the demand for health services in Uganda

Findings	Insights
55% of respondents had either been sick or injured and needed medical care within the past 6 months, 31% less than a month ago. This was even higher among existing Rocket Health customers, with 70% having needed medical aid within the past 6 months.	Medical services are needed regularly in the Ugandan market.
58% of respondents had not heard of “telemedicine” “e-health” or remote doctor consultation. 75% of respondents had never heard of “Rocket Health”.	There is a lack of awareness about Rocket Health’s method of service delivery, indicating a need for further marketing activities.
81% of respondents would be open to consulting a doctor over the phone, plus an additional 8% depending on the situation. Even more, 87%, were open to lab tests at home, plus 2% depending on the situation.	Most people are open to remote medical consultation and getting tests from home, which is significantly more than those who knew it’s an option, suggesting opportunity for market growth.
80% of respondents are also open to receiving mental health therapy from home, with the most selected method being phone calls (53%) followed by WhatsApp chat (22%).	There is a market demand for telemedicine to deliver mental health support.
65% of respondents typically spent less than 500,000 UGX (~\$140 USD) per month, with 29% spending between 500,000 – 2 million UGX per month, and only 7% spending over 2 million per month.	Uganda has a budget-sensitive population that could quickly have spending money wiped out by a medical expense. Therefore, telemedicine services in Uganda must be price sensitive.

2.4 Challenges in Uganda’s Telemedicine Market

The biggest challenges respondents suggested that people may face in receiving healthcare from home included:

- *Connectivity
- *Digital illiteracy
- *Awareness
- *Trust
- *Financial constraints



PARTICIPANT 11

"The challenge is that rural communities will still be disadvantaged. With low internet penetration of about 35% and high cost of data and smart phones [...] only the privileged can access these services."

2.5 Recommendations to Overcome Challenges and Meet Market Demands

Respondents in Uganda made several recommendations to help meet the challenges of rolling out telemedicine services in Uganda.

1. Increase marketing to create more awareness about telemedicine
2. Build trust in this new method of healthcare through strategic partnerships with trusted health.....brands including the national Health Ministry and NGOs like USAID
3. Introduce a USSD code to ease access for potential customers that do not have internet access orbasic digital literacy skills
4. Increase specialised services, such as mental healthcare and services for the chronically ill.



PARTICIPANT 12

"As a first time visitor, I am a little bit questioning, for example who are these people, are their services legit, authentic etc., I think this uncertainty halts my taking up the service there and then and therefore I would say Rocket Health need to do enough publicity, if I am confident in who they are, definitely I would be all in for their operations."



PARTICIPANT 13

"I think that - they have to work to get recognition by other hospitals & labs."



PARTICIPANT 14

"it would be great if people were able to access psychiatrists too given that most insurance companies do not cater for it."



PARTICIPANT 15

"We need a wellness clinic. Everything from autoimmune illnesses to supplying vitamins and pain management,"

3. How Rocket Health Grew in 2020-2021

Several communications tactics contributed to the increasing reach and impact of Rocket Health's services in Uganda throughout the pandemic.

These included:

*Introducing more offline advertising such as billboards

*A USSD service allowing potential patients to reach the company through non-smart feature phones

*Timely special campaigns like Black Friday and offering highly demanded services, such as COVID-19 tests

*Strategic partnerships with high-credibility industry partners.

3.1 Rocket Health Online/Offline Promotions

Rocket Health made strong and steady use of its social media platforms to grow engagement through the pandemic period. We found that the most notable campaigns contributing to awareness and uptake of Rocket Health services in Uganda.

1.#SpotTheRocket – amplifying a new billboard campaign

2.Black Friday Sale – capitalising on trends to attract customers with discounts

3.#RocketHealthOnStar280Hash (*280#)
– Introduction of the offline text service



Figure 8: Participant 9 and 10 speaking about the potential benefits of telemedicine.



Figure 10: Image from #RocketHealthOnStar280Hash campaign



Figure 11: Billboard promoting #RocketHealthOnStar280Hash

The company addressed the limitations of Ugandan internet access and digital literacy by introducing a USSD contact number (*280#) and promoting it through billboards, radio, television and print advertising as seen in figure 10 and 11. The USSD campaign was both an “above the line” and “below the line” advertising campaign, using mainstream and social media. Rocket Health requested its online users to take photos of the billboards in their areas and share on social platforms when they spotted Rocket Health billboards, as well as delivery agents and street poles. It was dubbed #SpotTheRocket.

USSD service, which allowed potential patients to access services without internet, went through testing in early 2021 and went live to begin receiving enquiries from the public in May of 2021. USSD is a more familiar technology to many Ugandans who may be offline or use feature phones. USSD usage peaked during the deadly June-July 2021 wave of COVID-19 in Uganda.

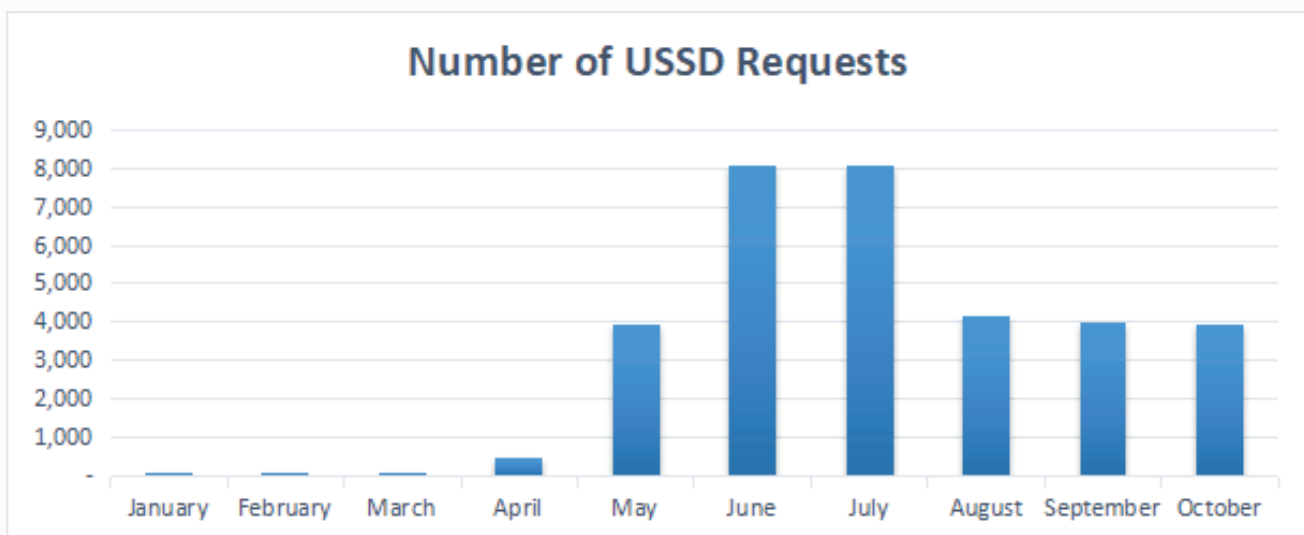


Figure 12: Graph illustrating the growth trend in the number of USSD requests as a result of the USSD campaign awareness.

There was a consistent push and communication of the #RocketHealthOnStar280Hash campaign to increase awareness and usage of Rocket Health.

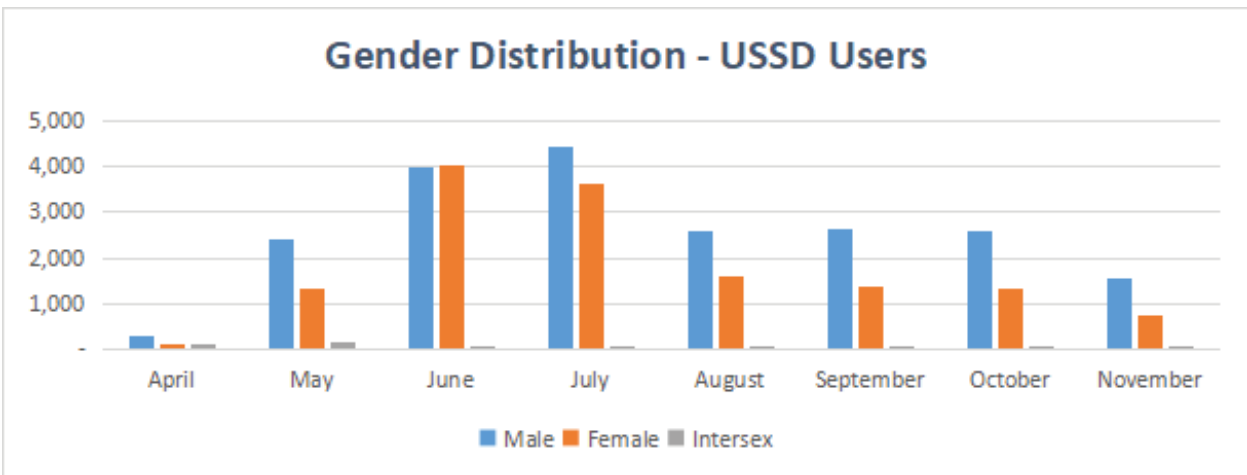


Figure 13: A graph illustrating the gender distribution in the USSD requests in 2021.

A breakdown of gender distribution among the USSD users in 2021 shows that typically more men than women were using the service, which aligns with overall phone access by gender in the country. There were 20,482 total male users, 14,131 total female users and 270 intersex users. However, female users equalled male during the most intense period of the pandemic in Uganda, suggesting that more women discovered and began using Rocket Health services as part of their role caring for family and friends.

In 2020, Rocket Health ran promotions for Black Friday sales as seen in figure 9. Black Friday offers included giving out free tele-consultations, 20% discount on tests and vaccinations, 30% annual health care plans and 10% off on all pharmacy products.



Figure 14: Rocket Health poster advertising home and office testing kits.



Figure 15: Rocket Health poster showing prices for Rocket health covid-19 tests



Figure 16: Rocket Health Covid-19 home-based care package.

Rocket Health also responded to market needs by offering home-based COVID-19 tests, home based treatment packages for asymptomatic patients, and selling COVID-19 essentials like face masks and sanitizers. The company .

Rocket Health registered over 6,000 COVID-19 PCR and Rapid Antigen Test sales from November 2020 to September 2021.

3.2 Strategic Partnerships

Focus Group respondents suggested that Rocket Health should partner with other medical organisations that are trusted, respected and could increase the credibility of telemedicine services. According to our national market research survey, the most trusted medical organisations in Uganda are:

- *Uganda Cancer Institute (UCI)
- *Uganda Ministry of Health
- *Africa Air Rescue (AAR)
- *Union des Assurances de Paris (UAP)
- *International Medical Centre (IMC)
- *International Hospital Kampala (IHK)

Rocket Health partnered with Union des Assurances de Paris (UAP), Africa Air Rescue (AAR) and other well-known medical insurers to roll out telemedicine for their medical insurance members. Through the partnership, Rocket Health’s team of licensed medical professionals monitors and coordinates the healthcare needs of a select group of clients in a medical insurance scheme offering remote, convenient and time-saving services.[
<https://tmcg.co.ug/partnership-between-the-medical-concierge-group-uap/>]

This was part of a larger business expansion effort to extend Rocket Health’s services to other insurance providers, including: Jubilee, ICEA, Liberty, Sanlam, Prudential, GA Insurance, Aetna, Bupa and Allianz.

4. Research Methodology

This paper is based on a public opinion investigation into the Ugandan telemedicine market. Methods used in the investigation included surveys, focus groups, monitoring online conversations, and reviewing business data over a period of more than a year. Research was conducted during the COVID-19 pandemic in Uganda.

The main objective of the research was to find out what people's perspective on telemedicine is and what the existing clients of Rocket Health think about the service.

Research questions included:

- *How well do you understand telemedicine?
- *What are your experiences in the health care system?
- *What is the market potential of telemedicine in Uganda, and how could it appeal to Ugandans?

We conducted two surveys: one for existing Rocket Health customers to gather their informed feedback, and another for the general public to investigate market awareness and demand. Each of the surveys was conducted over a week from 23rd July to 29th July of 2020 using an online Survey Monkey link shared with existing customers and non-customers through email, WhatsApp, Twitter, and phone calls. Most of the insights included in this report were gathered in the larger market survey.

The focus groups were unusual in that they were conducted not in person but online over WhatsApp. This was due to the international nature of the research team and COVID-19 public health restrictions. Based on our overarching research questions, we formulated questions to ask during the discussion, which people answered during key rush periods and in their own time over the course of about 48 hours. One focus group was made up of existing Rocket Health customers while the other represented the general public, within the urban centre and upcountry.

Discussion of telemedicine and Rocket Health in particular was monitored online to see how it was performing, in terms of engagement with the digital audience, particularly on Facebook and Twitter. This involved scraping data from online sources to conduct text and network analysis to determine trends over time.

5. Conclusion

The coronavirus outbreak and associated limitations that are a result of lockdowns have increased demand for home-based care provided by telemedicine. The public and private sectors have been forced online, along with their beneficiaries and customers, which has created an environment in which people are more open to experimenting with new online services. Companies like Rocket Health that were already operating in the Ugandan

market have reaped the rewards of the changing circumstances, not only by providing needed services in a way that overcomes lockdown restrictions, but also by wisely attending to challenges such as accessibility and trust, and increasing the reach and relevance of marketing activities.

6.Acknowledgements

Whitehead Communications and Rocket Health are grateful to our wider research teams – including: Dan Kayongo, Owilla Mercy Abiro, Norman Angel, Joyce Jiang, Mbirizi David, Angella Kizito, Sandra Arinaitwe, Hilda Kemirembe, Priscilla Akora, Patricia Onyutta, Davis Rotich, Osbert Mwijukye, Dr John Mark Bwanika, Dr Davis Musinguzi – and all those who participated in the research.

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APPENDIX I

The figures below represent the sample space used while conducting our research in WhatsApp group discussions and market surveys.

Sample size = 392

Gender

Gender	Percentage
Male	49%
Female	50%
Other/prefer not to say	1%

Employment

1	Fulltime employed	39%
2	Self-employed	29%
3	Home duties	21%
4	Student	16%
5	Part-time employed	14%
6	Unemployed	9%
7	Other	5%
8	Retired	4%

Location

Location	Percentage
Central Uganda - Greater Kampala area	37%
Central Uganda - outside of Kampala	16%
Eastern Uganda	17%
Northern Uganda	10%
Western Uganda	19%

Age

Age	Percentage
Under 18	1%
18-24	27%
25-34	38%
35-44	16%
45-54	11%
55-64	5%
65+	2%