The Multichannel Landscape

New world, new ways:
Using multichannel in health

healthdirect
Australia

Partner
Forum 2018

Key points

Health consumers' behaviours are comprehensively multichannel

Industry, government and practitioners lag behind consumers

Mobile devices are dominant

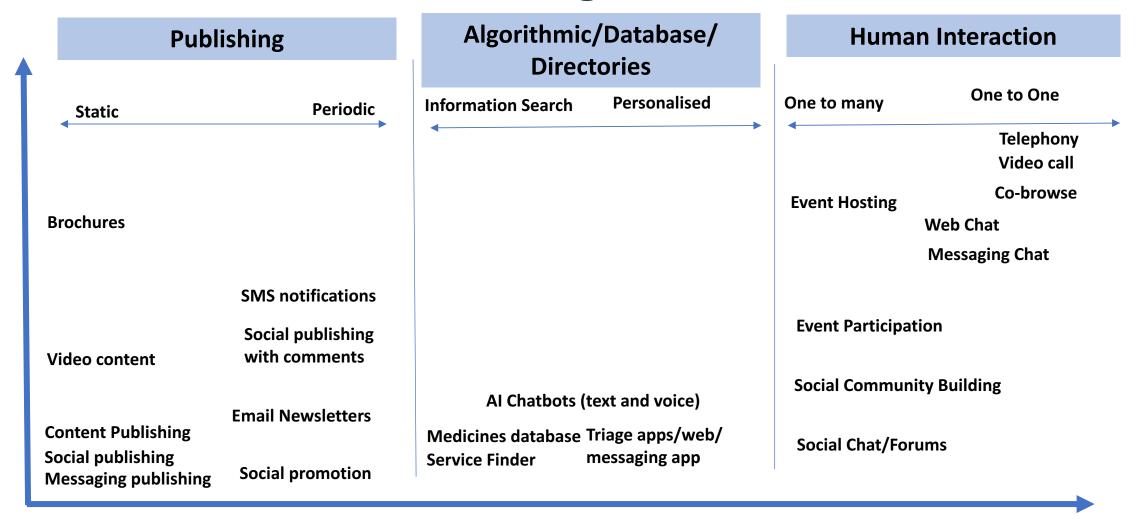Social media is absolutely mainstream

Messaging is huge and growing

Chat and voice interfaces are here. Get ready

healthdirect Australia | Partner Forum 2018

A framework for considering multichannel

Publishing	Algorithmic/Database/Directories	Human Interaction

Cost per user interaction (vertical axis)

Interactivity (horizontal axis)

Publishing
Static ←——————→ Periodic

Brochures

SMS notifications

Video content

Social publishing with comments

Content Publishing
Social publishing
Messaging publishing

Email Newsletters

Social promotion

Algorithmic/Database/Directories
Information Search ←——————→ Personalised

AI Chatbots (text and voice)

Medicines database
Service Finder

Triage apps/web/messaging app

Human Interaction
One to many ←——————→ One to One

Telephony
Video call
Co-browse

Event Hosting

Web Chat

Messaging Chat

Event Participation

Social Community Building

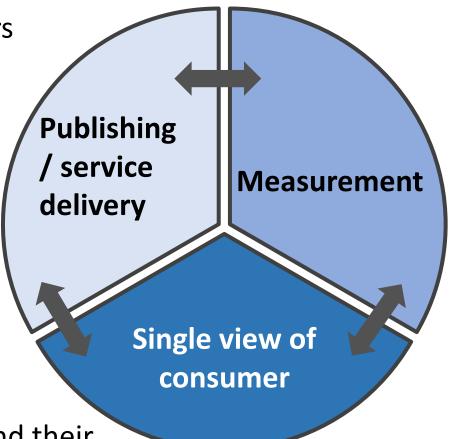Social Chat/Forums

healthdirect Australia | Partner Forum 2018

Three domains of multichannel

Delivering content and services for consumers

Metrics and analytics to create insights into multichannel behaviours and determine KPIs and benchmarks
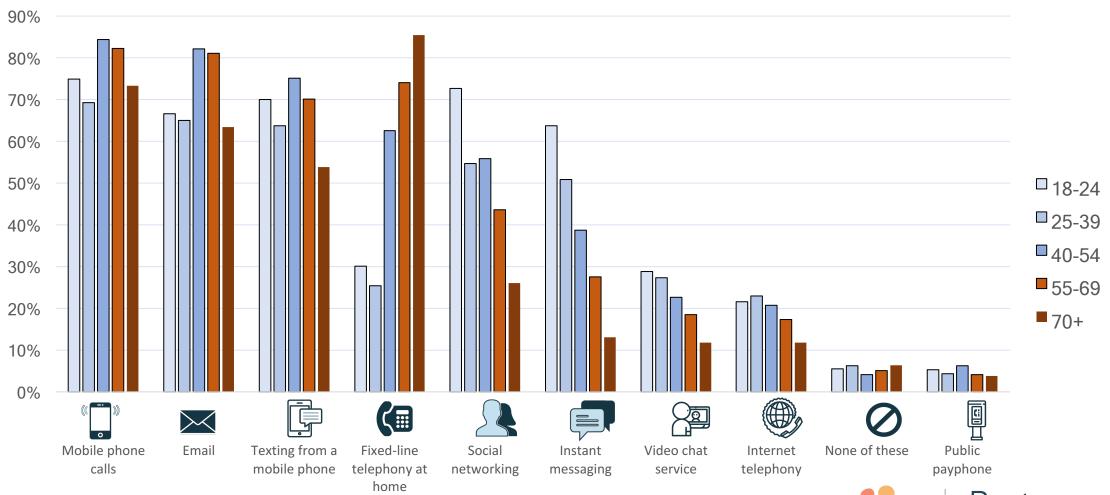
Publishing / service delivery

Measurement

Single view of consumer

Following consumers and their experiences as they move between channels

healthdirect *Australia*

Partner Forum 2018

Australian Health Consumer and Practitioner Behaviours

health *direct*
Australia

Partner
Forum 2018

Australian telecommunications use: Age spread

Source: Healthdirect Australia, Multichannel Direct Research 2016

healthdirect Australia | Partner Forum 2018

Australian telecommunications use: Age spread

Legend:
- 18-24
- 25-39
- 40-54
- 55-69
- 70+

Categories: Mobile phone calls, Email, Texting from a mobile phone, Fixed-line telephony at home, Social networking, Instant messaging, Video chat service, Internet telephony, None of these, Public payphone

Source: Healthdirect Australia, Multichannel Direct Research 2016

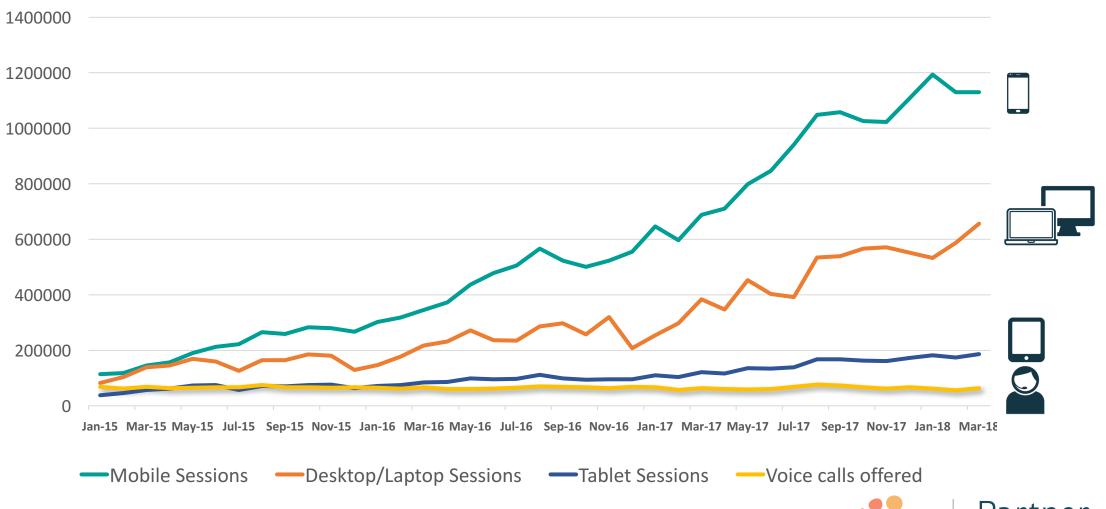**health**direct
Australia

Partner
Forum 2018

Australian telecommunications use
Aboriginal and Torres Strait Islander & Culturally and linguistically diverse populations

Device use: healthdirect
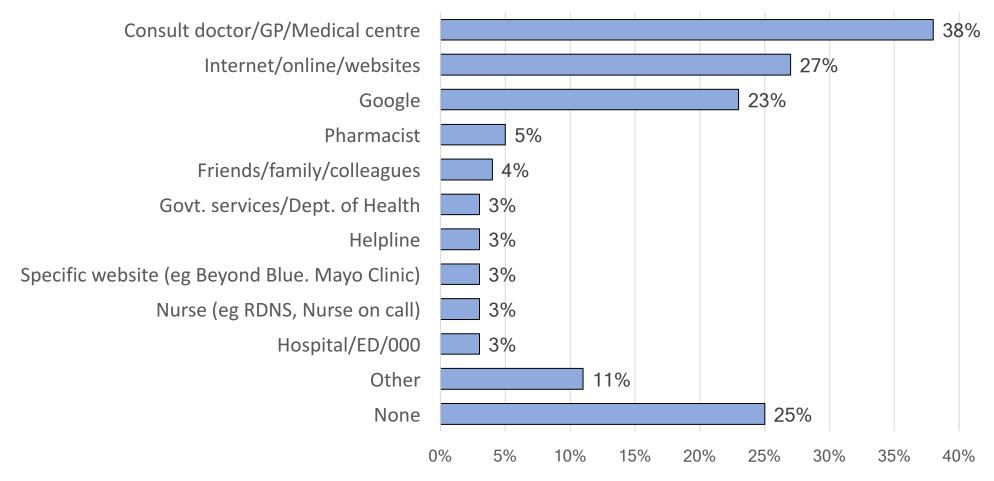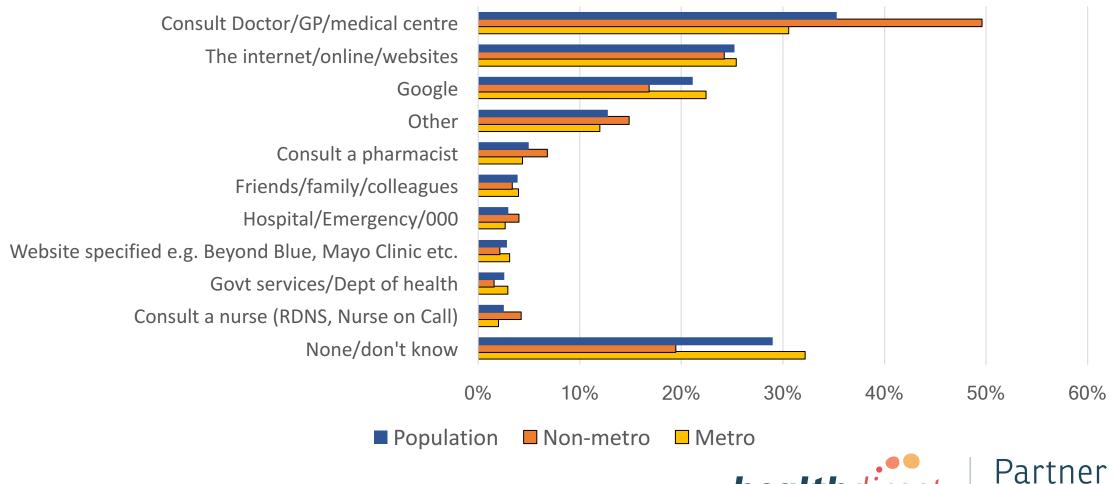

Legend: Mobile Sessions — Desktop/Laptop Sessions — Tablet Sessions — Voice calls offered

Source: Healthdirect Australia, GA & contact centre data

health**direct** *Australia* | Partner Forum 2018

Consumer channel familiarity

Spontaneous mention of channels for health information, advice and treatment

Channel	Percentage
Consult doctor/GP/Medical centre	38%
Internet/online/websites	27%
Google	23%
Pharmacist	5%
Friends/family/colleagues	4%
Govt. services/Dept. of Health	3%
Helpline	3%
Specific website (eg Beyond Blue. Mayo Clinic)	3%
Nurse (eg RDNS, Nurse on call)	3%
Hospital/ED/000	3%
Other	11%
None	25%

*health*direct
Australia

Partner
Forum 2018

Consumer channel familiarity: Regional
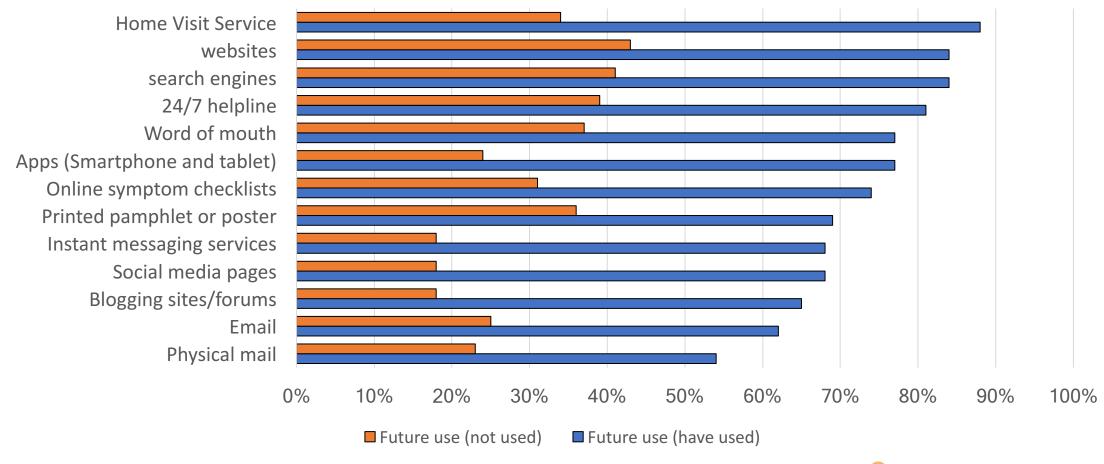
Spontaneous mention of channels for health information, advice and treatment

Source: Healthdirect Australia, Multichannel Direct Research 2016

Partner Forum 2018

Future healthcare channel use (prompted)

	Future use (not used)	Future use (have used)

Legend: ■ Future use (not used) ■ Future use (have used)

Categories (top to bottom):
Home Visit Service, websites, search engines, 24/7 helpline, Word of mouth, Apps (Smartphone and tablet), Online symptom checklists, Printed pamphlet or poster, Instant messaging services, Social media pages, Blogging sites/forums, Email, Physical mail

X-axis: 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
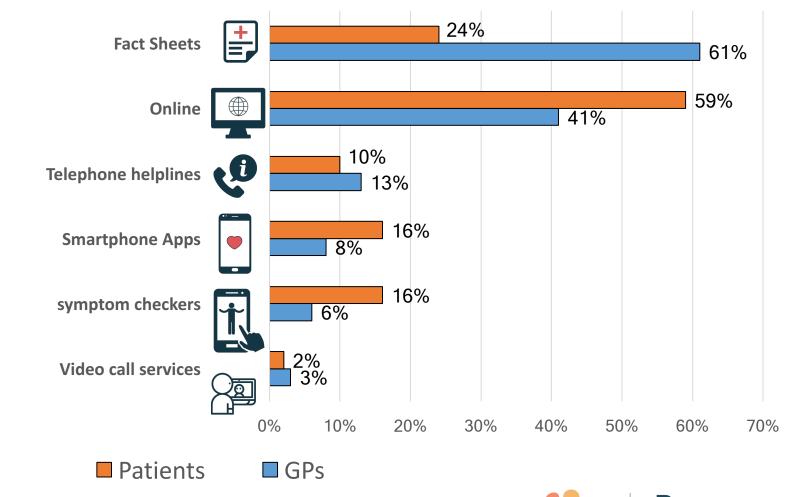
*health*direct
Australia

Partner
Forum 2018

Preferences for information: GPs v consumers

GPs were asked:

- How often do patients refer to information from these channels?

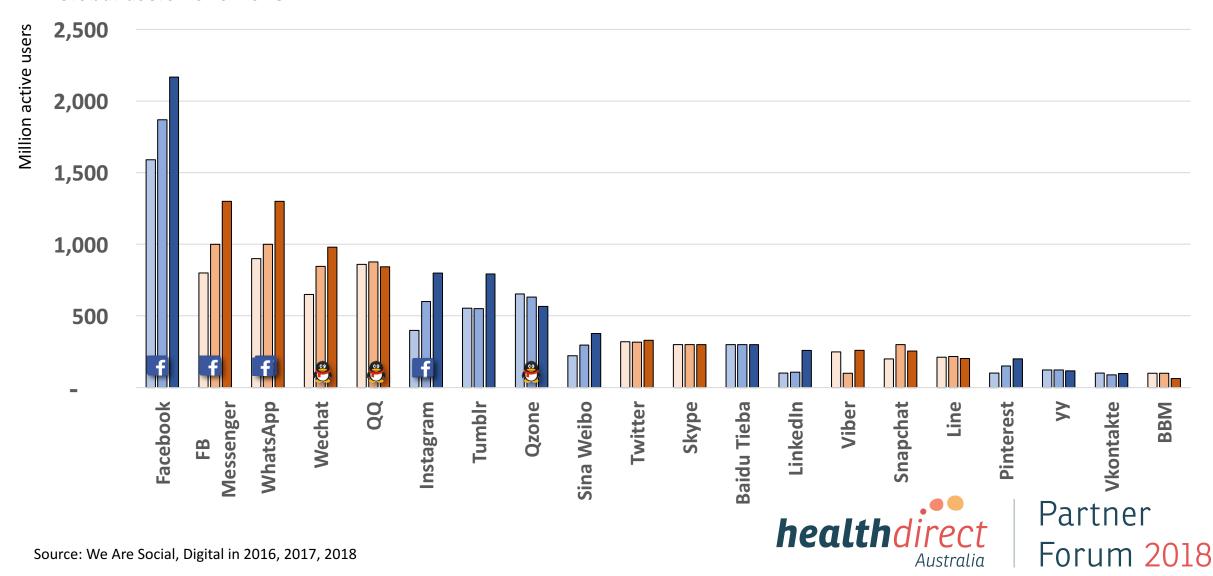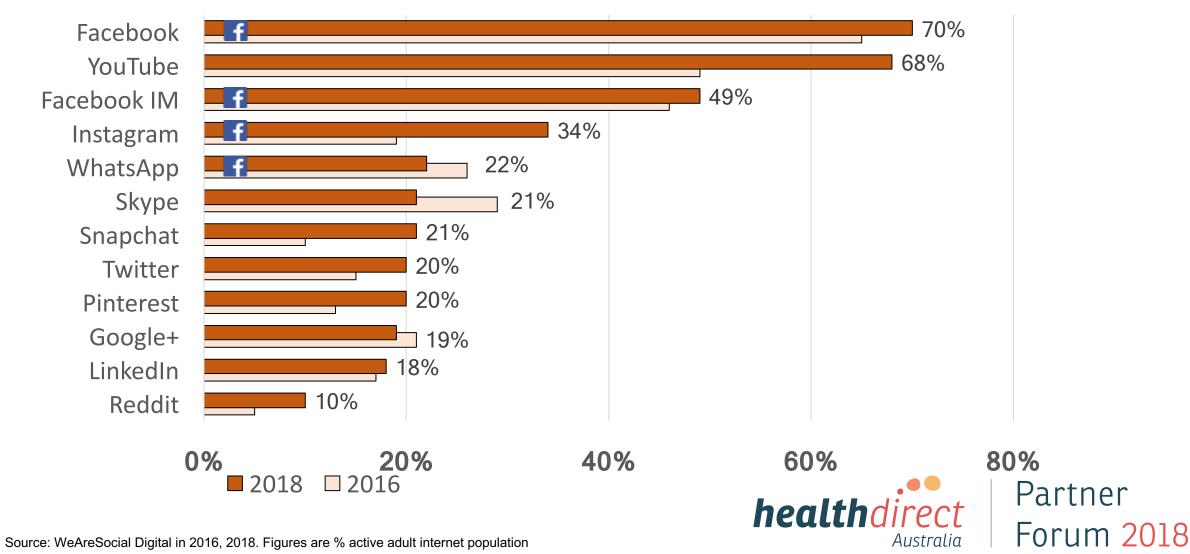- How often do you refer your patients to information from these channels?

Fact Sheets
- 24% (Patients)
- 61% (GPs)

Online
- 59% (Patients)
- 41% (GPs)

Telephone helplines
- 10% (Patients)
- 13% (GPs)

Smartphone Apps
- 16% (Patients)
- 8% (GPs)

symptom checkers
- 16% (Patients)
- 6% (GPs)

Video call services
- 2% (Patients)
- 3% (GPs)

0% 10% 20% 30% 40% 50% 60% 70%

■ Patients   ■ GPs

Source: Healthdirect Australia GP Online Survey 2015

healthdirect *Australia* | Partner Forum 2018

Social Media

healthdirect Australia | Partner Forum 2018

Messaging and social are huge

Global users 2016-2018

Source: We Are Social, Digital in 2016, 2017, 2018

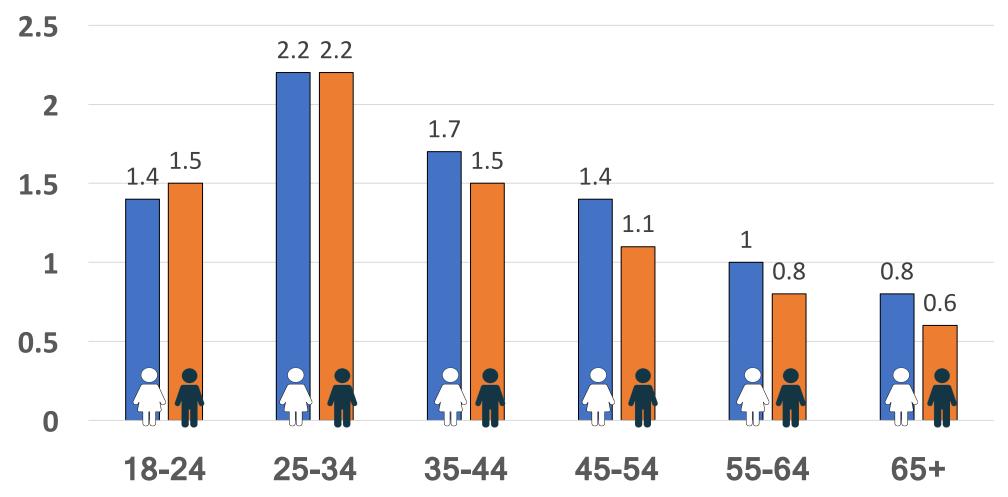# AU social media use: Facebook is #1. Also #3, #4 and #5.

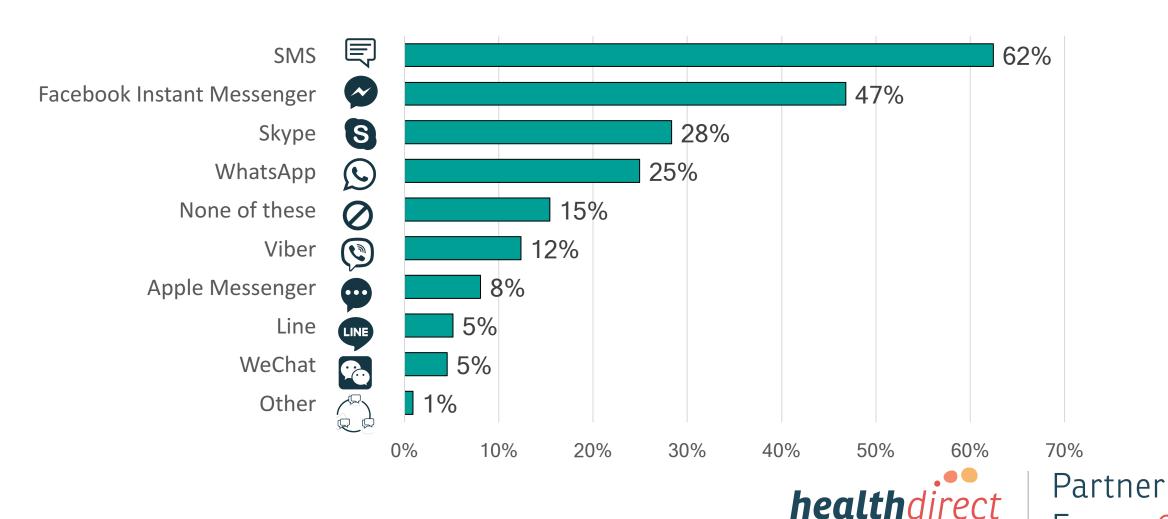Social media network and messaging service use in Australia, 2016-2018

Platform	2018
Facebook	70%
YouTube	68%
Facebook IM	49%
Instagram	34%
WhatsApp	22%
Skype	21%
Snapchat	21%
Twitter	20%
Pinterest	20%
Google+	19%
LinkedIn	18%
Reddit	10%

0%   20%   40%   60%   80%

■ 2018   □ 2016

health direct
Australia

Partner
Forum 2018

Facebook AU: Age and gender

Messaging

healthdirect Australia | Partner Forum 2018

Messaging in Australia
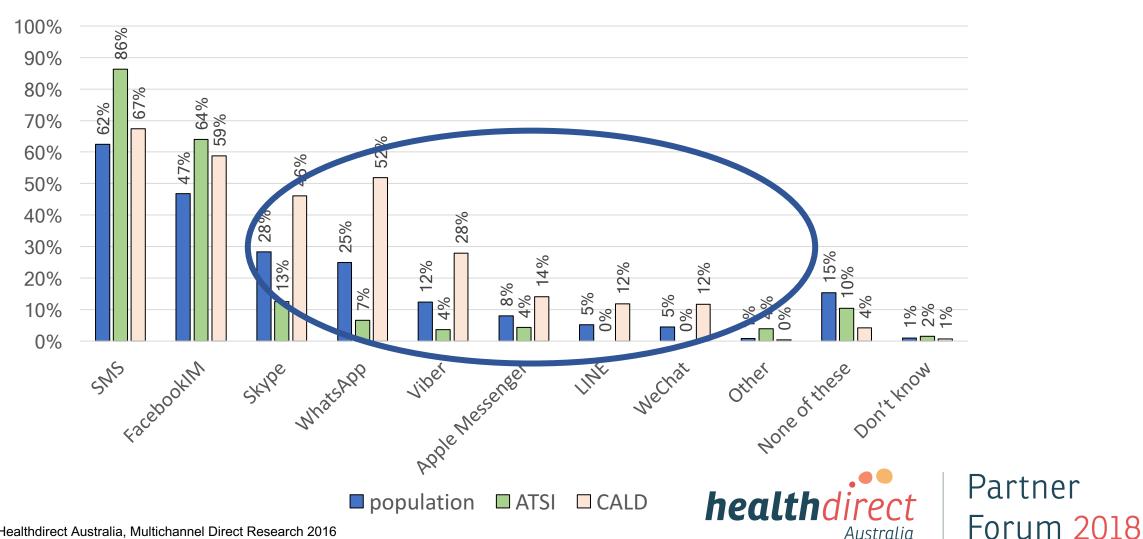
Percentage of Australian population using messaging services, 2016

Service	Percentage
SMS	62%
Facebook Instant Messenger	47%
Skype	28%
WhatsApp	25%
None of these	15%
Viber	12%
Apple Messenger	8%
Line	5%
WeChat	5%
Other	1%

healthdirect
Australia

Partner
Forum 2018
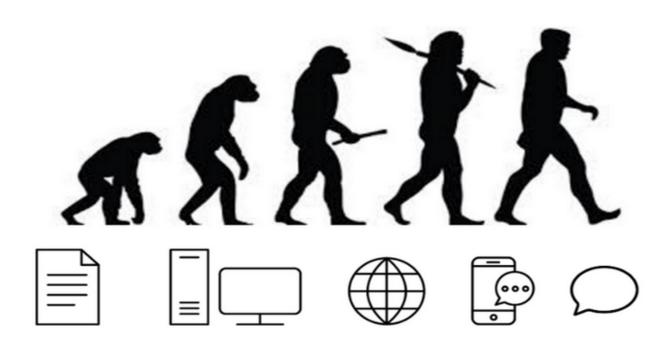
Messaging platforms
Aboriginal and Torres Strait Islander & Culturally and linguistically diverse populations

Legend: ■ population ■ ATSI □ CALD

Platform	population	ATSI	CALD
SMS	62%	86%	67%
FacebookIM	47%	64%	59%
Skype	28%	13%	46%
WhatsApp	25%	7%	52%
Viber	12%	4%	28%
Apple Messenger	8%	4%	14%
LINE	5%	0%	12%
WeChat	5%	0%	12%
Other	0%	4%	0%
None of these	15%	10%	4%
Don't know	1%	2%	1%

Source: Healthdirect Australia, Multichannel Direct Research 2016

health**direct** Australia | Partner Forum 2018

Chatbots

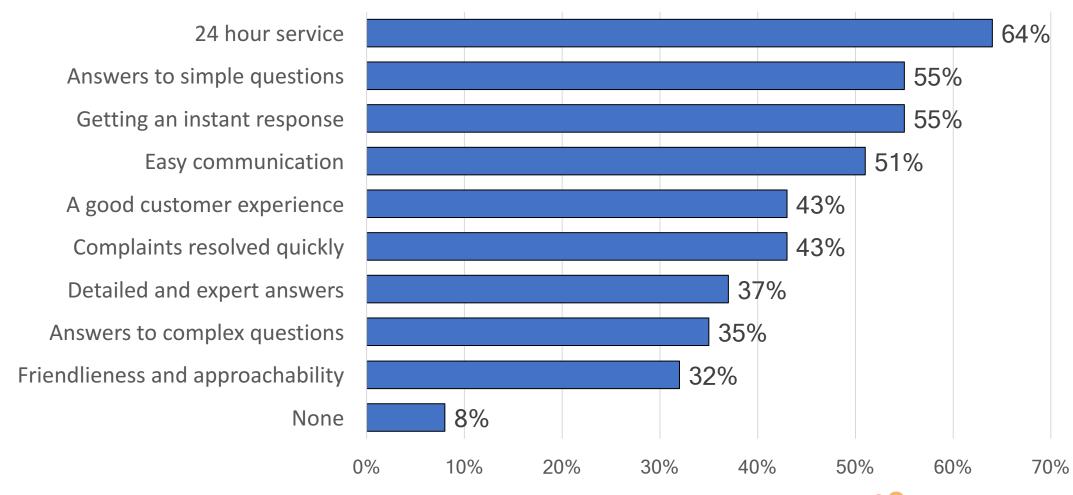# It's all about the interface. Or lack of one

"A service, powered by rules and sometimes artificial intelligence, that you interact with by a chat interface."

- Can be a stand-alone app or an existing platform

- It may or may not use free-text input

- May use text or voice

- It can be one-to-one or one-to-many

- It can connect humans to humans or humans to machines

- Can use AI or machine learning, or be simple rules-based

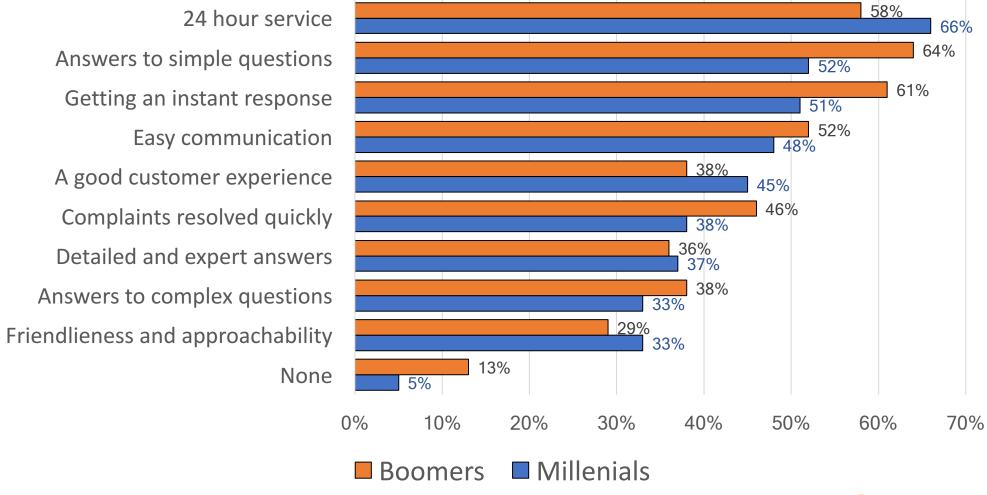- It is usually real-time and transient

Source: https://chatbotsmagazine.com/the-complete-beginner-s-guide-to-chatbots

healthdirect Australia | Partner Forum 2018

Chatbot potential benefits

Benefit	Percentage
24 hour service	64%
Answers to simple questions	55%
Getting an instant response	55%
Easy communication	51%
A good customer experience	43%
Complaints resolved quickly	43%
Detailed and expert answers	37%
Answers to complex questions	35%
Friendlieness and approachability	32%
None	8%

healthdirect
Australia

Partner
Forum 2018

Chatbot potential benefits: Intergenerational differences

Benefit	Boomers	Millenials
24 hour service	58%	66%
Answers to simple questions	64%	52%
Getting an instant response	61%	51%
Easy communication	52%	48%
A good customer experience	38%	45%
Complaints resolved quickly	46%	38%
Detailed and expert answers	36%	37%
Answers to complex questions	38%	33%
Friendlieness and approachability	29%	33%
None	13%	5%

■ Boomers ■ Millenials

Source: Drift/Audience/Salesforce, 2018 State of Chatbots Report

healthdirect
Australia

Partner
Forum 2018

Two types of voice interface devices emerging

Screen first — Screen-based services enhanced by voice-control systems — Smartphones, tablets, TVs

Voice First — Speaker-based systems, sometimes enhanced with screen — Amazon Echo family, Google Home, Apple Homepod, Car-based systems, third-party speakers such as Sonos

healthdirect Australia | Partner Forum 2018

Smart speaker use cases

Use case	Percentage
Gneral questions	60%
Weather	57%
Stream Music	54%
Timers and Alarms	41%
To-do lists	39%
Calendar	27%
Home Automation	27%
Stream news	22%
Find local businesses	16%
Playing Games	14%
Bluetooth Audio	12%
Audiobooks	11%
Order products	11%
Order food/services	8%
Podcasts	3%

*health*direct *Australia* | Partner Forum 2018

Healthdirect Australia examples

Social media

Facebook pages
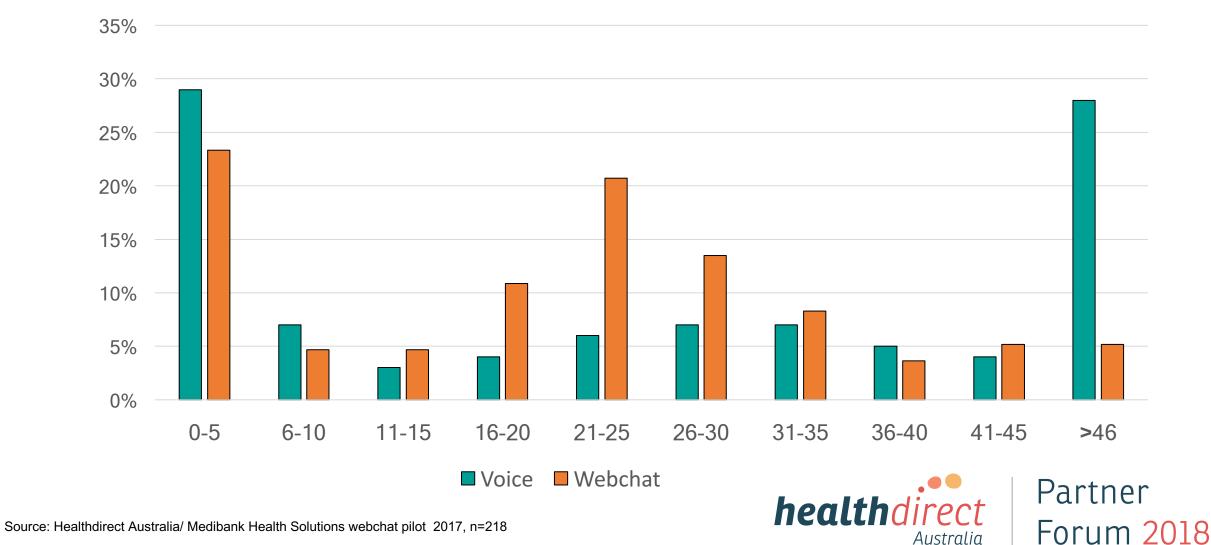
Live forums

Mobile publishing

healthdirect Australia | Partner Forum 2018
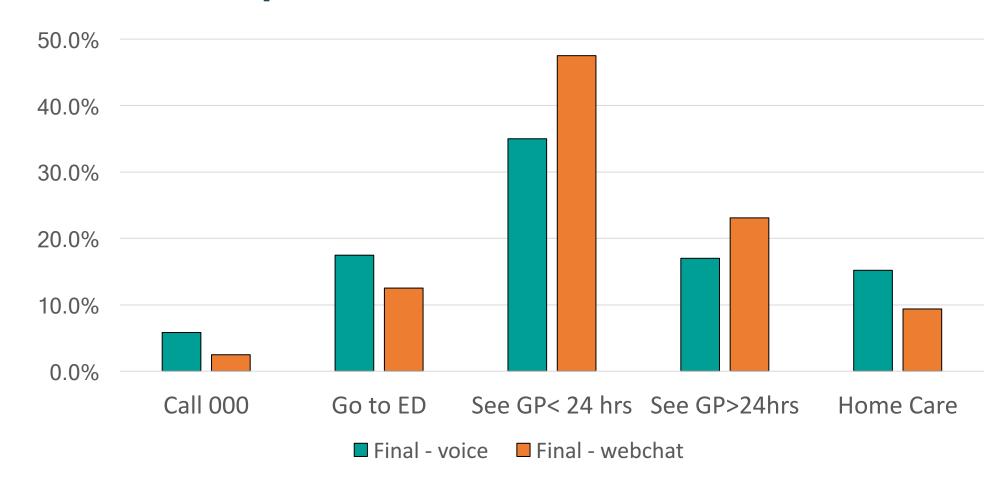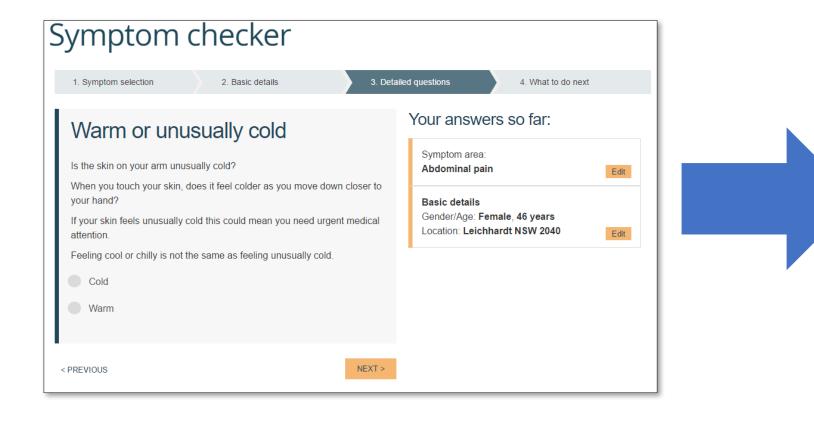
Webchat: Disposition outcomes

Source: Healthdirect Australia/ Medibank Health Solutions webchat pilot 2017, n=218
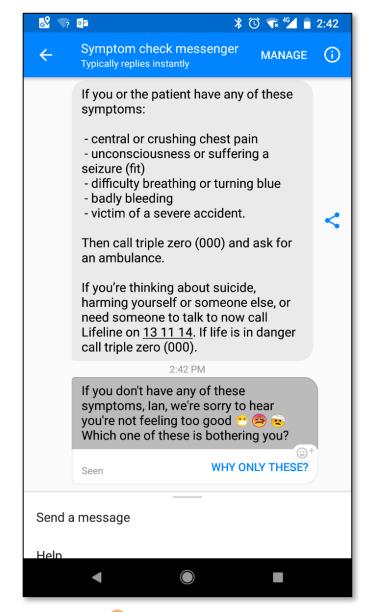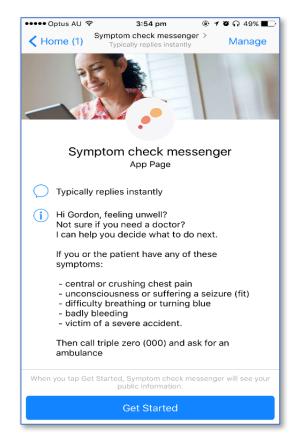
Symptom Checker Chatbot

Replication of Symptom Checker functionality in Facebook Instant Messenger
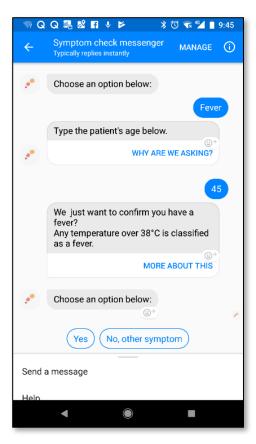
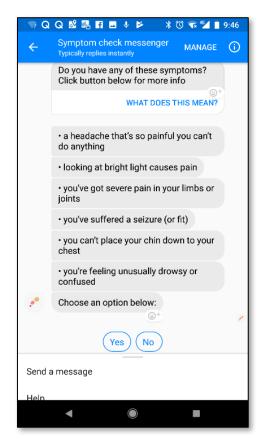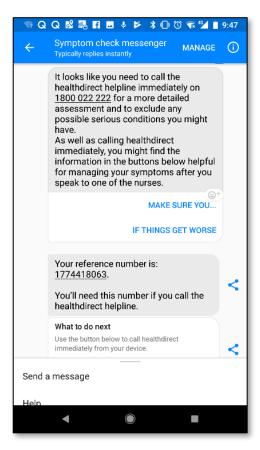# Developed in Facebook Instant Messenger platform

- Final dispositions include (where appropriate) referral to NHSD for primary and acute care providers
- Warm transfer between web, chatbot and telephony

healthdirect Australia | Partner Forum 2018

Voice apps – Summer and Winter Health

Service Finder: Natural language pilot

healthdirect Australia | Partner Forum 2018