

Video Chatterbox Nation

Healthcare

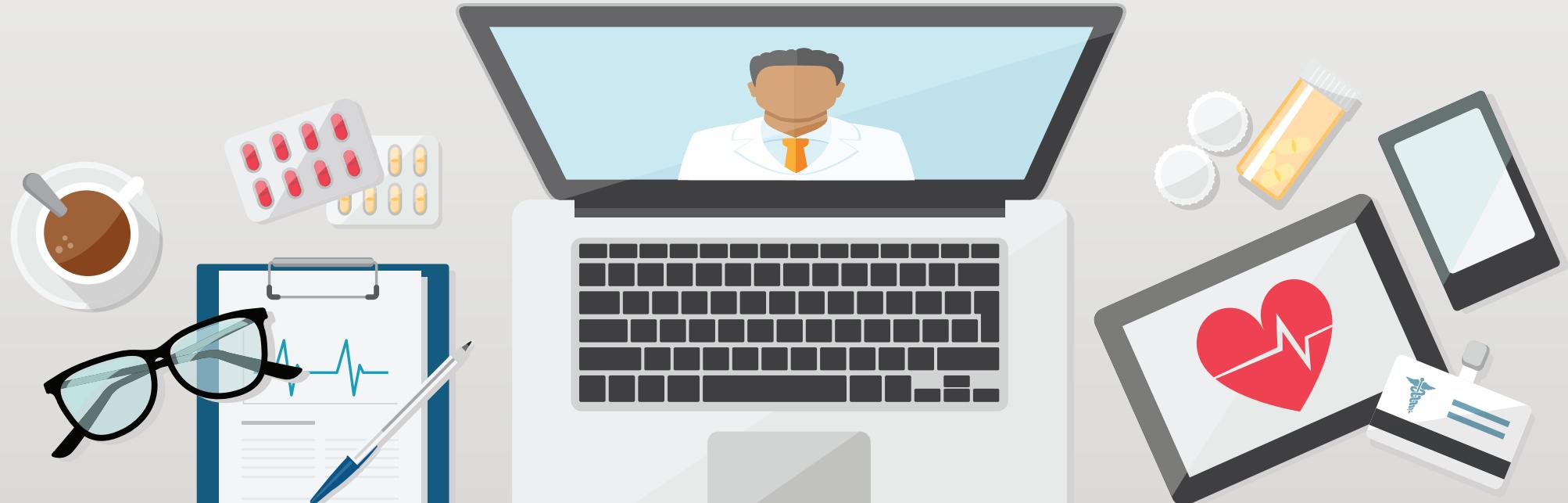
A report on live video communications in the healthcare industry: yesterday, today and tomorrow.



Live Video in Healthcare

When TokBox, now part of **Nexmo, the Vonage API Platform**, ran its **first national study** about Americans' attitudes toward video communications in 2012, less than half of the country were regularly video chatting, and this was almost entirely with friends and family. Repeated in 2015, 2017 and again in 2018, the now longitudinal study provides deep insights into the transition of video from social to commercial use and its pervasiveness.

Using primary research data from **Video Chatterbox Nation 2018** and platform data from the Nexmo live video API, OpenTok, this report takes a closer look at live video communications in the healthcare industry. For anyone focused on customer experience or digital transformation in healthcare, this report reveals changing consumer behaviors and expectations, an industry analysis, and future outlook.



Key Takeaways for Healthcare Innovators



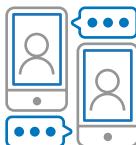
Universal Adoption

Live video is reaching almost universal adoption for social use between friends and family



Business Is Next

Consumers want to video chat not just with friends and family, but businesses and brands too—including healthcare providers



The Most Personal Experience

A key motivation for video calling is that it creates a more personal experience than other channels



Different Industry Adoption

As video calling with businesses and brands becomes mainstream, industries are adopting it at different rates



Healthcare On Track

Healthcare has fairly well-matched supply and demand for live video services, although there is an opportunity to drive further consumer uptake



Strong Future Growth

Healthcare is forecast to continue as a high growth industry for live video chat between customers and providers



Hottest Use Case

Remote doctor consultations has the strongest consumer usage and forecast growth in healthcare



Quality at Scale

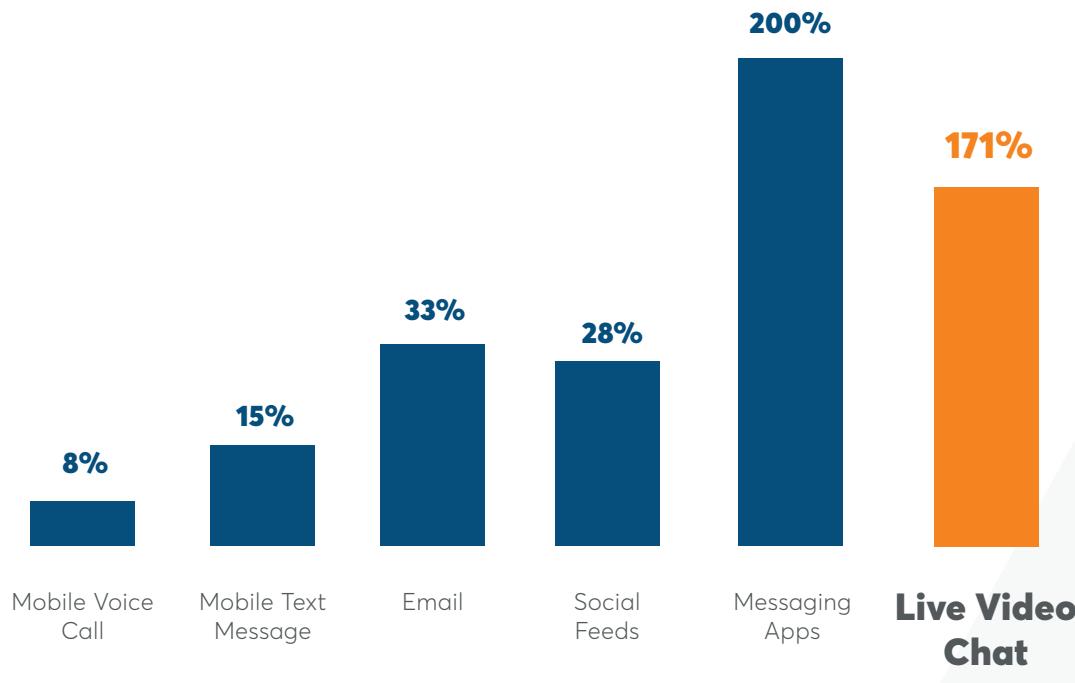
As live video in healthcare grows, providers must navigate the technological challenges of delivery including security and quality at scale

The Age of Social Video Chat

The rise of video chat through the ages—from occasional video calls to an everyday method of social communication in everyone's pocket

Growth of Communication Channels Between Friends and Family

2015 - 2018 percentage growth of regular usage



Today 1 in 3 people video chat **at least once a week.**



2 in 5 people video chatted more in 2018 than they did in 2017.



Millennials overwhelmingly chat the most with a **175% increase** in regular live video usage over the last three years.

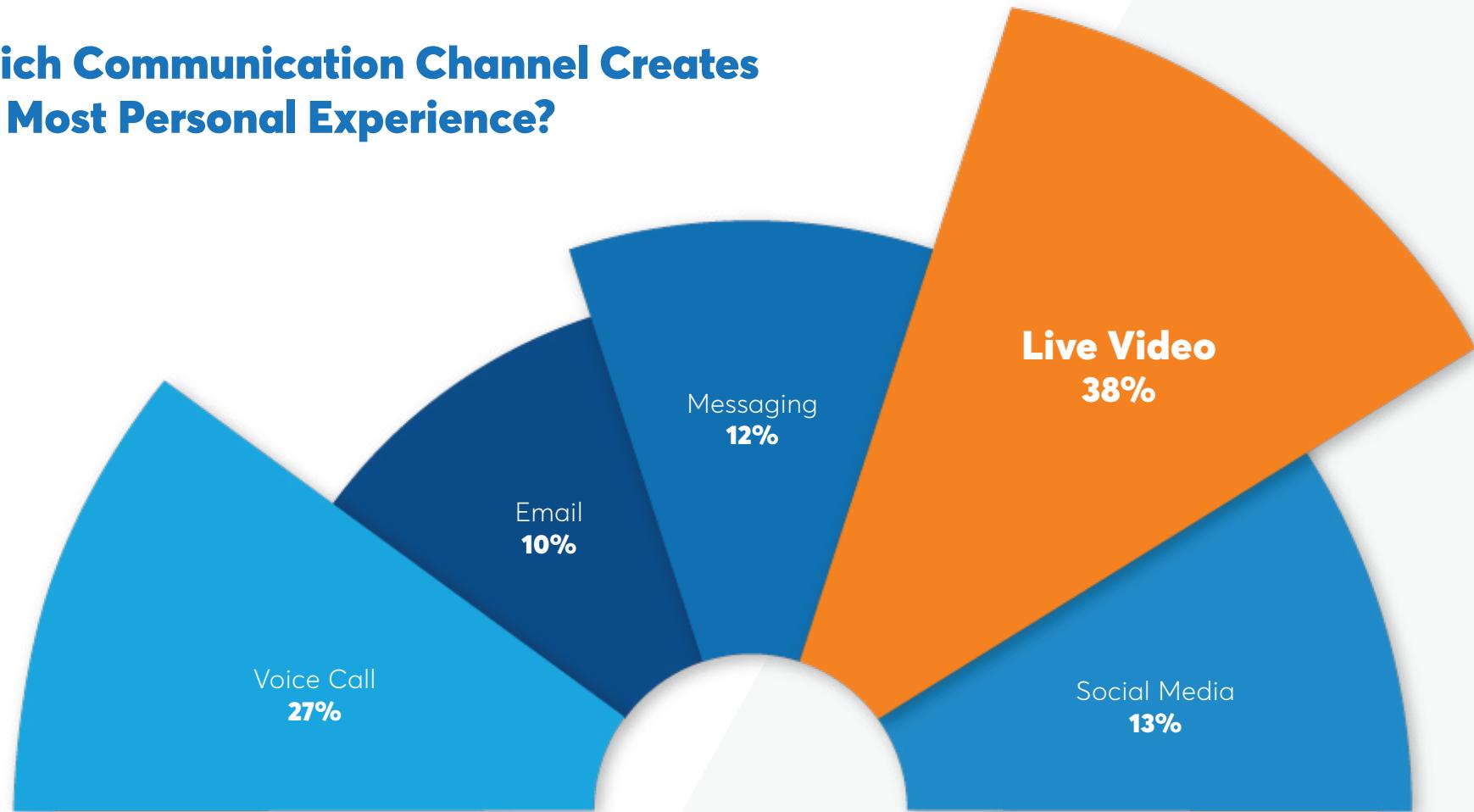


Today **1 in 4** millennials chat every day.

Create Personal Customer Experiences with Live Video

A key motivation for video calling is that it creates a more personal experience compared to other channels.

Which Communication Channel Creates the Most Personal Experience?



The Rise of Consumer-to-Business Video Communications

With live video achieving rapid social adoption, consumer-to-business video communication is swiftly following suit.

Growth of Communication Channels Between Consumers & Businesses

2015-2018 percentage growth of regular usage



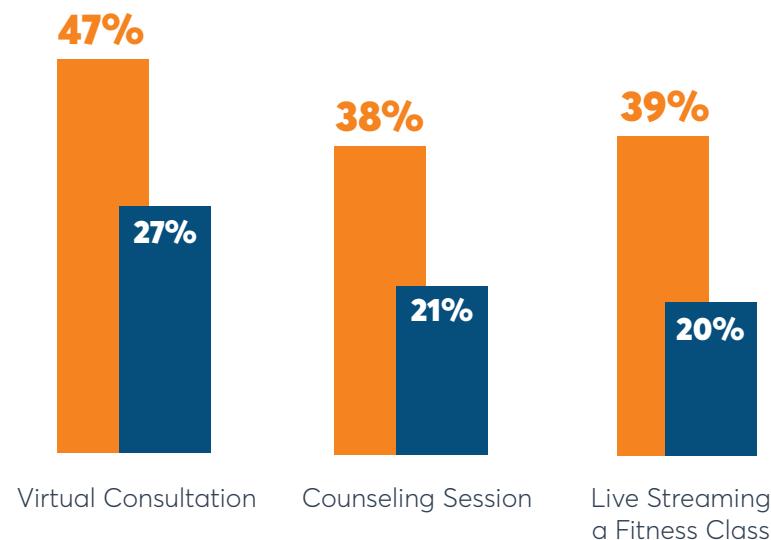
The steady growth of consumer-to-business live video throughout the years suggests video chat will be a lasting phenomenon.

Is your customer communications strategy ready for live video?

How Consumers Use Live Video in Healthcare

Don't miss an opportunity to engage with your customers on this rising channel. Gain a better understanding how live video is being used across the healthcare industry.

Where Do Consumers Want to Use Video Chat?



- Have Used Live Video
- Willing to Use Live Video



Virtual Consultations



Expert Collaboration



Post-op Home Monitoring



Counseling or Group Therapy

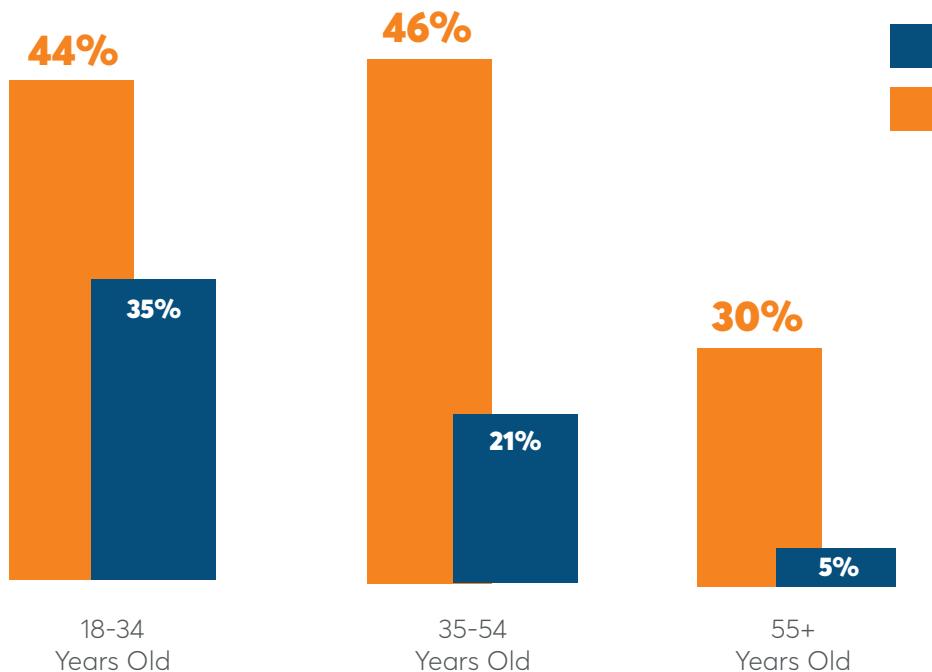


Live Streaming a Fitness Class

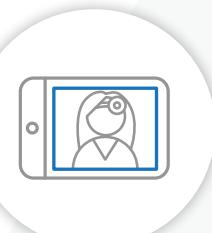


Almost **1 in 4 people** are already using live video to chat with a doctor about a non-emergency condition such as renewing a prescription. **This is set to double in 2019.**

Who is Video Chatting?



Have Used Live Video
Willing to Use Live Video



#3 Tablet



#2 Laptop



#1 Mobile

Why do Consumers Video Chat in Healthcare?

- More affordable care
- Wider access to specialists
- Faster and more convenient care anytime, anywhere
- Improved patient experience and outcomes

Mobile is the Preferred Device for Video Chat in Healthcare

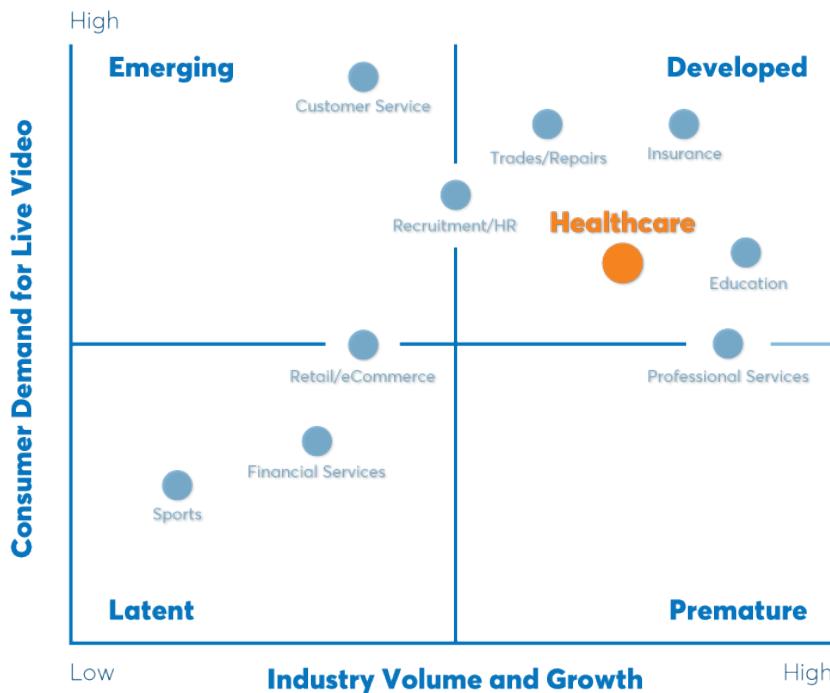
Industry Analysis

Is the healthcare industry meeting consumer demand for live video?

As live video communications mature, it is inevitable that consumer appetites evolve at different rates for different types of services. This can make it difficult for companies to decide if and when to invest in video communications, to ensure they are not investing in solutions consumers don't want whilst also not falling behind competitors.

This graph highlights the gaps and opportunities between consumer demand and industry delivery—based on a combination of survey responses, OpenTok platform minutes and industry growth.

How Does the Healthcare Industry Rank?



Gaps & Opportunities

- Consumer education could drive further uptake of video chat in healthcare
- High volume of video calling
- Consumer interest is steadily growing
- Live video-enabled services have expanded, however there is an opportunity for a wider roll-out

5 Live Video Rules for Healthcare Innovators



Mobile

Be available to everyone, anywhere and on any device

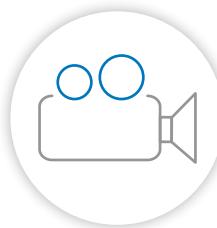
Healthcare doesn't have to begin with a trip to the doctor. Patients want access to quality care from wherever they need, on any device.



Secure

Prioritize privacy & protection of patient data

Live video consultations must be transmitted and stored securely, protecting patient privacy



Record

Record & securely archive for compliance

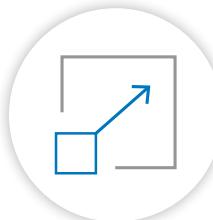
It is critically important to capture doctor-patient live video interactions for compliance and maintaining patient records.



Embedded

No downloads, no plug-ins, in context

Live video must be embedded into existing interfaces so that doctors and patients never have to leave their workflow or screen.



Scale

Highly personalized care, at scale

Whether live video is the primary channel for delivering care, or complementary to in-person care, quality at scale is critical.

Live Video Put into Practice

Virtual Consultations

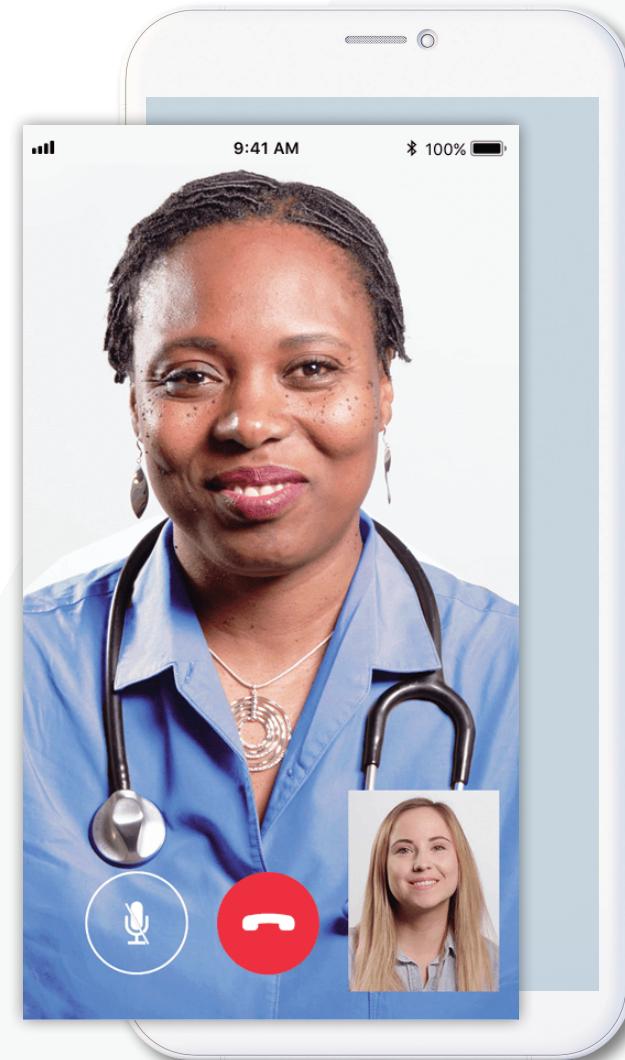
Babylon Health is the UK's leading digital health provider. The platform gives users quick and easy access to doctors via live video chat. Patients can book video consultations with doctors, get specialist referrals, and receive prescriptions. Through video consultations, Babylon Health is making healthcare affordable and accessible, without losing the human element.

Healthcare with No Boundaries

In order to make virtual consultations available to everyone, Babylon needed live video to work seamlessly on any device. To achieve this, Babylon used the OpenTok Client SDKs to deliver a simple and reliable smartphone experience for its users. With the OpenTok Platform and its high-quality interactive video, patients can speak face-to-face with a doctor directly from their smartphones, whenever they need and in a place that suits them.

The Results:

- 1 million app downloads with live video running on any device
- Remote medical advice provided to 250,000 people
- 800,000 registered users guaranteed privacy with fully encrypted and secure video



 babylon



The Vonage®
API Platform

Is your business ready for the next big customer communication channel?

Add live video to your customer communications strategy with Nexmo APIs

It's now easier than ever to meet growing consumer demand for live video communications. Whether building a new service from the ground up or adding to existing customer engagement channels, you can embed video into your web and mobile apps with the [Nexmo Video API](#).

From startups to established organizations, healthcare companies such as [Babylon Health](#), [ResolutionMD](#), [Intouch Health](#), and [Maven](#) rely on Nexmo to power seamless, secure live video interactions between patients, practitioners, and service providers.

But it doesn't stop at video. To deliver a truly outstanding experience in healthcare, companies must meet customers on all communication channels.

With communications APIs from Nexmo, you can now program any interaction so that the right message is delivered to the right person, on the right channel, at precisely the right moment.

Learn more. Contact us at:

+1.201.479.2414 | sales@nexmo.com

©2019 Nexmo, The Vonage API Platform

Building Blocks

Here are some of the communication building blocks you can use to make every customer interaction count:



Voice



Messaging



Video



Authentication

Speak to an expert about implementation and video best practices.

GET STARTED

About the Video Chatterbox Nation Study

Video Chatterbox Nation 2018 study was created by TokBox (now part of Nexmo, the Vonage API Platform) and administered by Toluna via the Toluna platform. The anonymous nationwide survey involved a sample of 1100 adults (18+ years of age) in accordance with US census representation figures for age, region, race, ethnicity, gender, and income.