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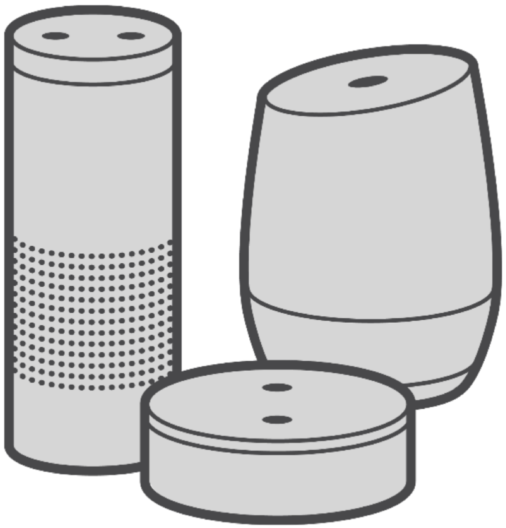


Great Voice Experiences Start with Listening:

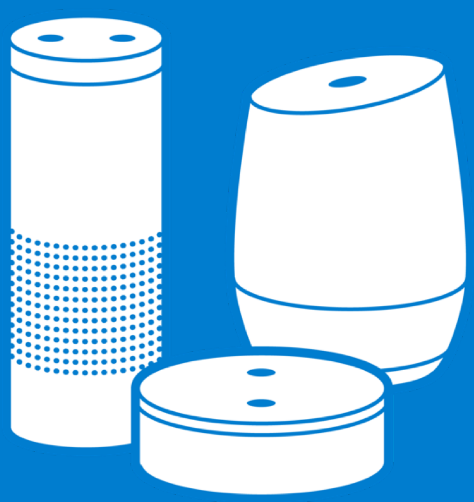
Research-based insights for designing healthcare voice interactions

A supplement to our report *Best Practices in Research and Design for Voice User Interfaces*

March 2018

Industry-specific findings

Brands must get their voice user experiences right the first time when building for smart speakers.



Over the last two years, we have seen the emergence of a major new technology category: the smart speaker. Amazon's Echo and Google Home, which debuted in 2015 and 2016, have created a new paradigm in the technology space, with other companies not far behind. While an estimated 35 million Americans currently use a smart speaker at least once a month, it is clear that we are only in the early days of this technology. Like digital and mobile before it, it is critical for long-term business success that companies of all shapes and sizes understand the power of voice-enabled devices.

Our [previous report](#) provided a look at the smart speaker landscape, including how and why brands should consider developing voice-activated applications. We'll now look more closely at the implications for key industries. What our research shows is that there is a tremendous amount of opportunity for brands to leverage smart speakers, particularly if they design applications that get it right from the get-go.

*Alexa, Say What?! Voice-Enabled Speaker Usage to Grow Nearly 130% This Year." EMarketer. May 08, 2017. Accessed October 02, 2017. https://www.emarketer.com/Article/Alexa-Say-What-Voice-Enabled-Speaker-Usage-Grow-Nearly-130-This-Year/1015812

**Gartner Says Worldwide Spending on VPA-Enabled Wireless Speakers Will Top $2 Billion by 2020." Gartner. Accessed October 02, 2017. http://www.gartner.com/newsroom/id/3464317

KEY FINDINGS: ACROSS INDUSTRIES

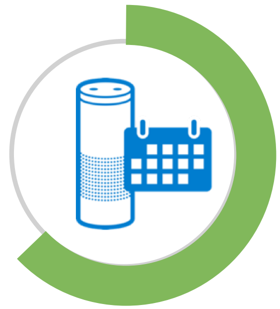
We surveyed 1,000 smart speaker owners and spent time in the homes of 10 owners to explore smart speaker use cases, opportunities for improvements, and design best practices. We'll dive into specific healthcare related findings in this report, but there are some relevant overarching findings that are applicable no matter your market segment.

- Smart speaker owners find their devices engaging- **73% of respondents said so.**
- However, our survey and interviews revealed there is a **significant gap between how they currently use their device and how they'd like to use their device.**
- **Across industries there is a big opportunity for using smart speakers for customer support.** 55% of respondents said they are very interested in using their smart speaker to contact customer support (email, phone, etc.).
- **Age has an impact.** The younger a person is, the more likely they are to be interested in the kinds of functionality brands can deliver.
    - Respondents over the age of 55 were significantly less interested than those between the ages of 35-54 in functionality.
    - Notably, those who are 35-54 were more interested than those who are 21-34.
    - The lesson? Brands that target older demographics will have more work to do in order to drive adoption.
- **Income is not a major factor.** Household income did not significantly affect responses. The only exceptions to that were when it came to financial services applications or setting up recurring purchases. This means most brands should not assume products and services intended for lower-income users are a lower priority.
- **Amazon and Google are open for business.** We found little difference in interest in smart speaker capabilities between those who own Amazon or Google products. Furthermore, Google and Amazon device owners considered themselves similarly tech-savvy. Brands should make sure their applications can function on both platforms.

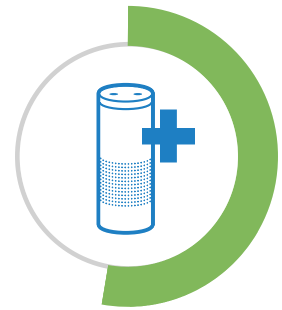
Healthcare

Medical and pharma brands face similar challenges to those faced by financial services, namely, users' concerns about privacy.

However, interest in the functionality this industry could provide was significantly higher than that for financial services. In addition, the percentages of those answering were in line with those for other industries.



57% are very interested in using their smart speaker to get reminders to take their medication.



54% are very interested in using their smart speaker to get health information.

48% are very interested in using their smart speaker to learn safety information about their prescriptions.

What the research shows is that users are indeed interested in speaker-enabled interactions with medical and pharma brands. At the same time, the data shows that the more personally identifiable information users need to provide, the less comfortable they are.

To reduce concerns of security and privacy we recommend that brands:

- Stay informed of developments in smart speaker security features.
- Begin with notifications to assist with med compliance and functionality that does not require the user to enter personal information (e.g., general health information).
- Look at other common interactions that are fairly straightforward and where voice could reduce friction (e.g., "why do I have to log in to my phone to do X?")

Your customers are talking – make sure you're listening

Consumers are ready for the smart speaker revolution but the technology is not yet there. Just as the web revealed that every company is a digital company, smart speakers will demand that every company have a strategy for voice. Understanding consumer expectations and behavior, and the unique benefits and challenges of voice technology will ensure that brands create experiences that are relevant, differentiated, and meaningful to their customers.

Do you have questions about designing for voice interactions or want help navigating your voice interaction strategy?

HOW TO WORK WITH US

AnswerLab can support your voice experience efforts in the following ways:

- Bring our Smart Speaker team on site for a Q&A as you begin exploring your strategy for designing voice interactions.
- Engage with AnswerLab workshops to help you define your digital strategy and plan for the user insights you'll need.

To learn more, contact us at answerlab.com/contact-us

About the research

We reviewed the current state of the smart speaker user experience through a multi-method research study including both qualitative and quantitative methods. Get additional findings from our Best Practices in Research and Design for Voice User Interfaces report (answerlab.com/insights)

Qualitative Research

We carried out in-depth in-person interviews with 10 smart speaker owners in Sacramento. Why Sacramento? It's one of the 15 most demographically representative cities in the United States. Participants for this segment of our research included people representing:

- A range of device ownership including the Google Home device and Amazon's Echo and Echo Dot devices
- Ages 24 to 60
- Mix of household incomes ($20k - $200k)
- Mix of education levels (high school graduate or higher)

Participants submitted seven days of diary entries, providing a snapshot of a typical week of activity. Following the diary submissions, in-home interviews allowed us to observe and investigate smart speaker usage in context. The interviews were 90-minute sessions that included both general exploratory questions about participants' current and desired use of smart speakers as well as usability tests of several representative voice applications.

Quantitative Research

We ran an online survey of 1,000 smart speaker owners throughout the United States with a panel provided by the market research company Lucid. Participants for this segment of our research included people representing:

- A range of device ownership including the Google Home device and Amazon's Echo, Dot, Show, and Tap devices
- Ages 21 to 75
- Smart speaker ownership ranging from one month to two years