



Who's Using **Healthcare Voice Search** and What For?

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BACKGROUND

From smartphones (e.g. Apple's Siri and Google's Android-based search apps) to smart speakers (e.g. Amazon Echo/Dot and Google Home), America is connected—nearly 90% of all consumers own a device that can search the internet simply by asking a question into a microphone. But owning voice-enabled devices and using them to search are two different things. In other research, the Zion & Zion research team found that 67.5% of consumers *are* searching with their voices, but exactly what they are searching for when it comes to healthcare related topics warrants further exploration.

EXECUTIVE SUMMARY

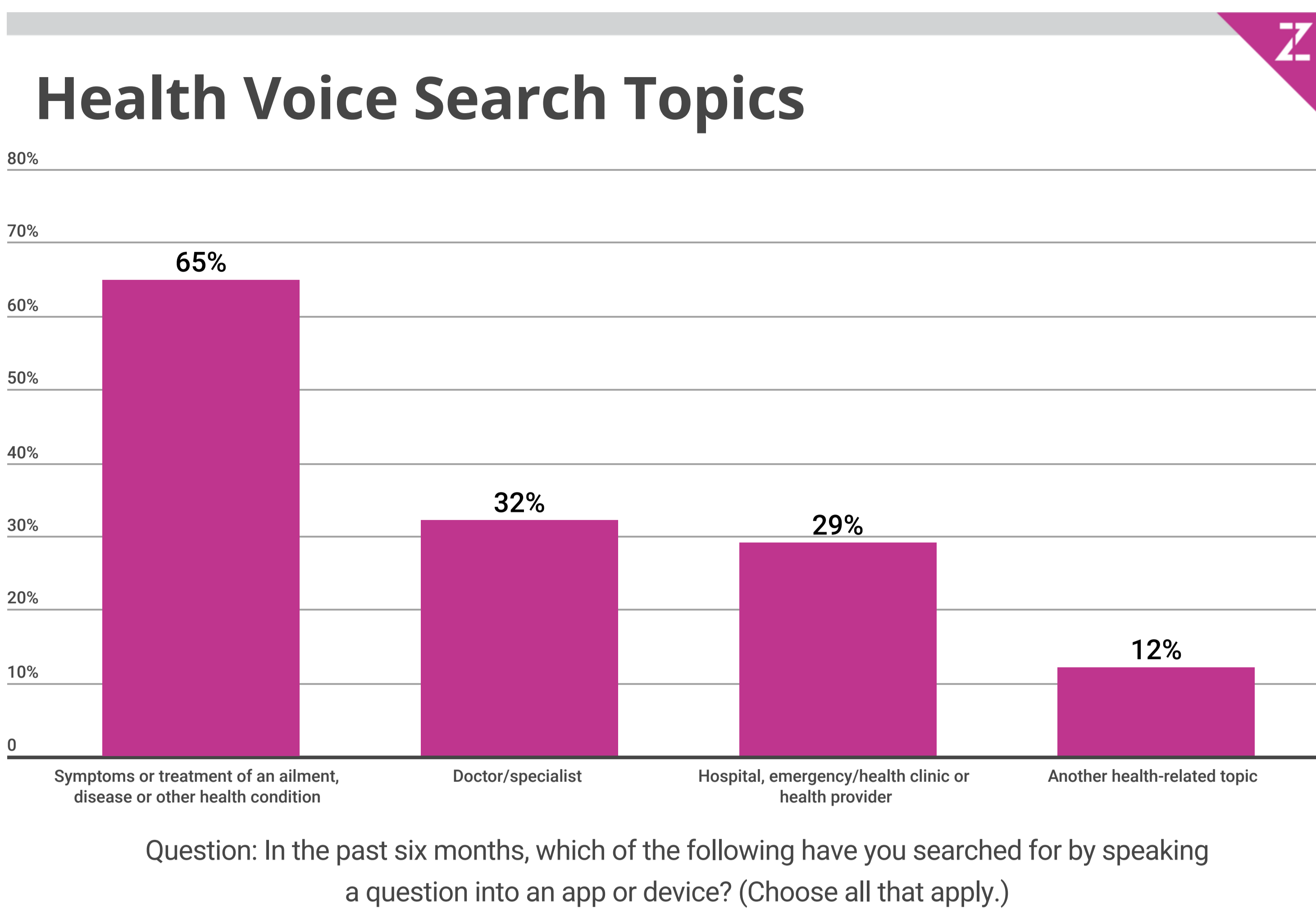
To better understand how consumers search using voice assistants and their implications for the healthcare industry, Zion & Zion conducted a nationwide survey of 1,049 consumers ages 18+. We investigated how consumers are using voice-enabled devices to search for healthcare information. We found that nearly a quarter of consumers use voice search for health-related questions. We also present implications of our findings for the healthcare industry.

HEALTH SEARCH TOPICS

Our nationwide survey discovered that a majority of consumers—76%—have not used voice search to ask a health-related question. But 24% are already taking advantage of voice technology for these search queries, and that presents opportunities and challenges for healthcare organizations.

In Figure 1, we explore which health topics people are searching for when they use their voice.

Figure 1



At 65%, the most popular type of health searches are those related to discovering information about symptoms or treatments of an ailment, disease or other health condition.

According to Google, the top 10 most popular health-related questions searched for in 2017 were:

1. What causes hiccups?
2. How to stop snoring?
3. What causes kidney stones?
4. Why am I so tired?
5. How long does the flu last?
6. What is normal blood pressure?
7. How to lower cholesterol?
8. What is ADHD?
9. What is lupus?

Some of these queries may lead to consulting a medical professional, but other searches are already very focused. Of consumers using voice search for health questions, nearly one-third of respondents in our study say that they use voice search to find a doctor, and 28% are looking for a hospital, emergency facility, or clinic. The volume of these voice searches is certain to climb as Apple's recently introduced Siri-enabled HomePod smart speaker grabs market share.

Figures 2 and 3 show how age affects use of voice search for acquiring health information.

Figure 2

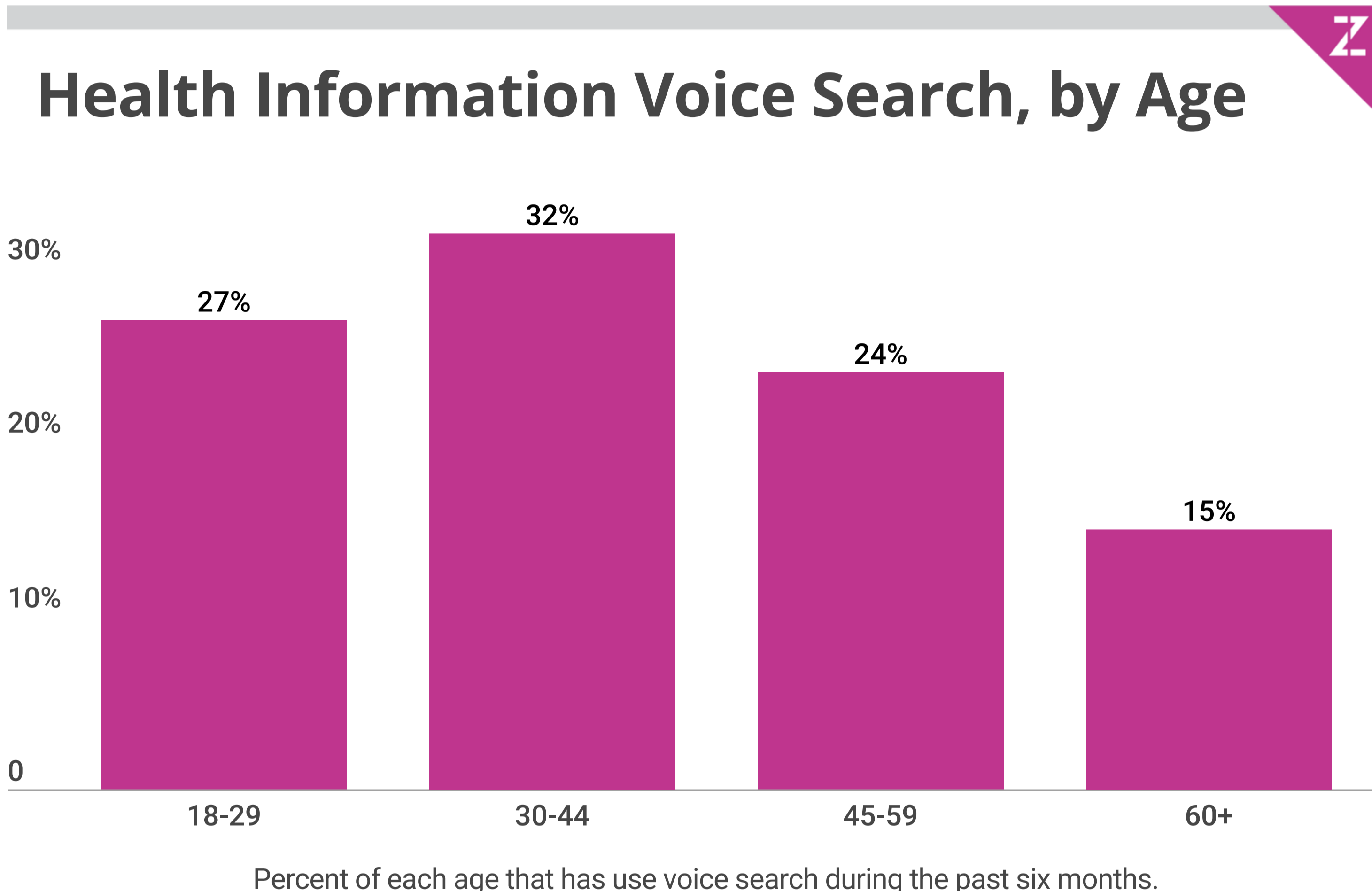
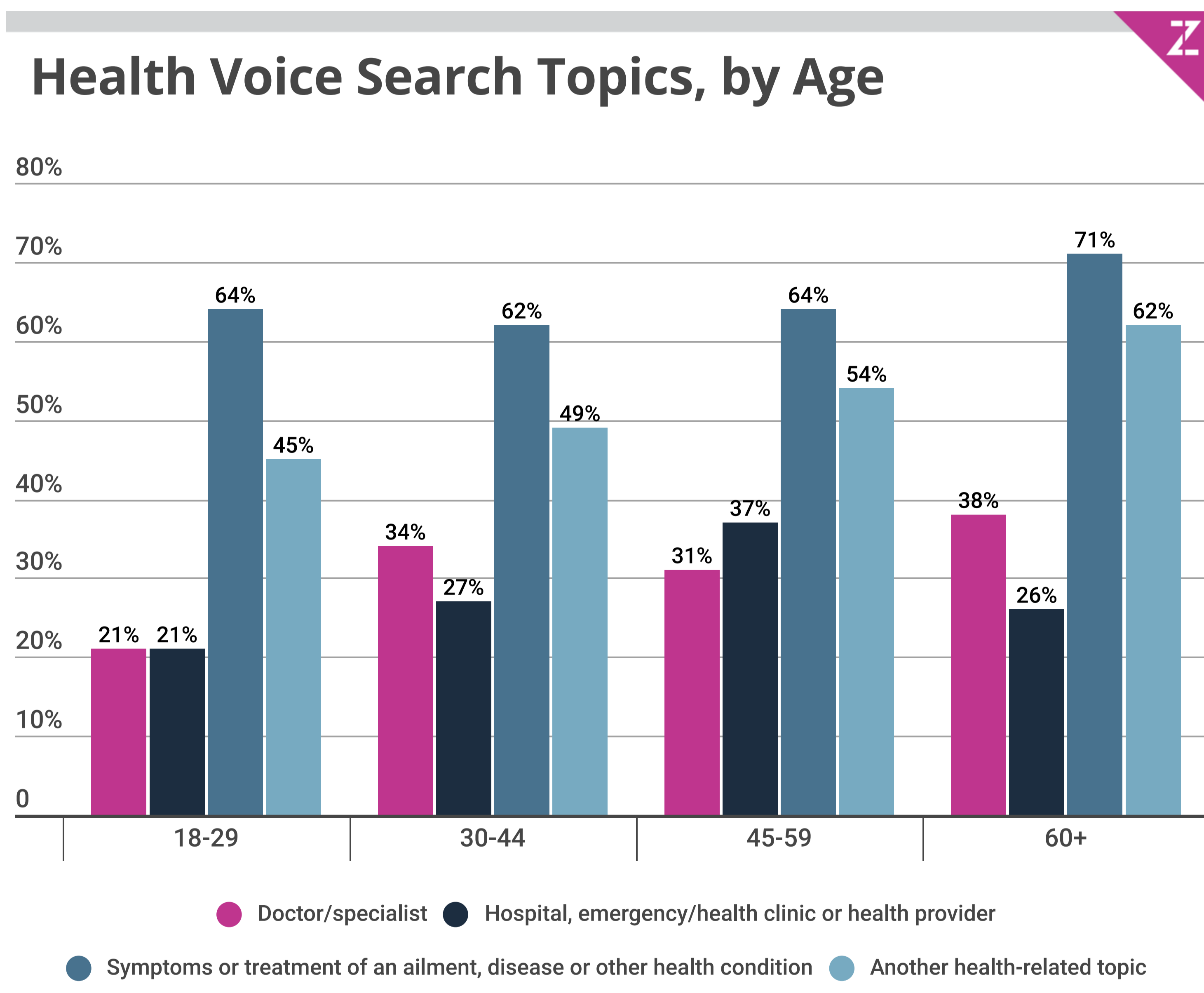


Figure 3

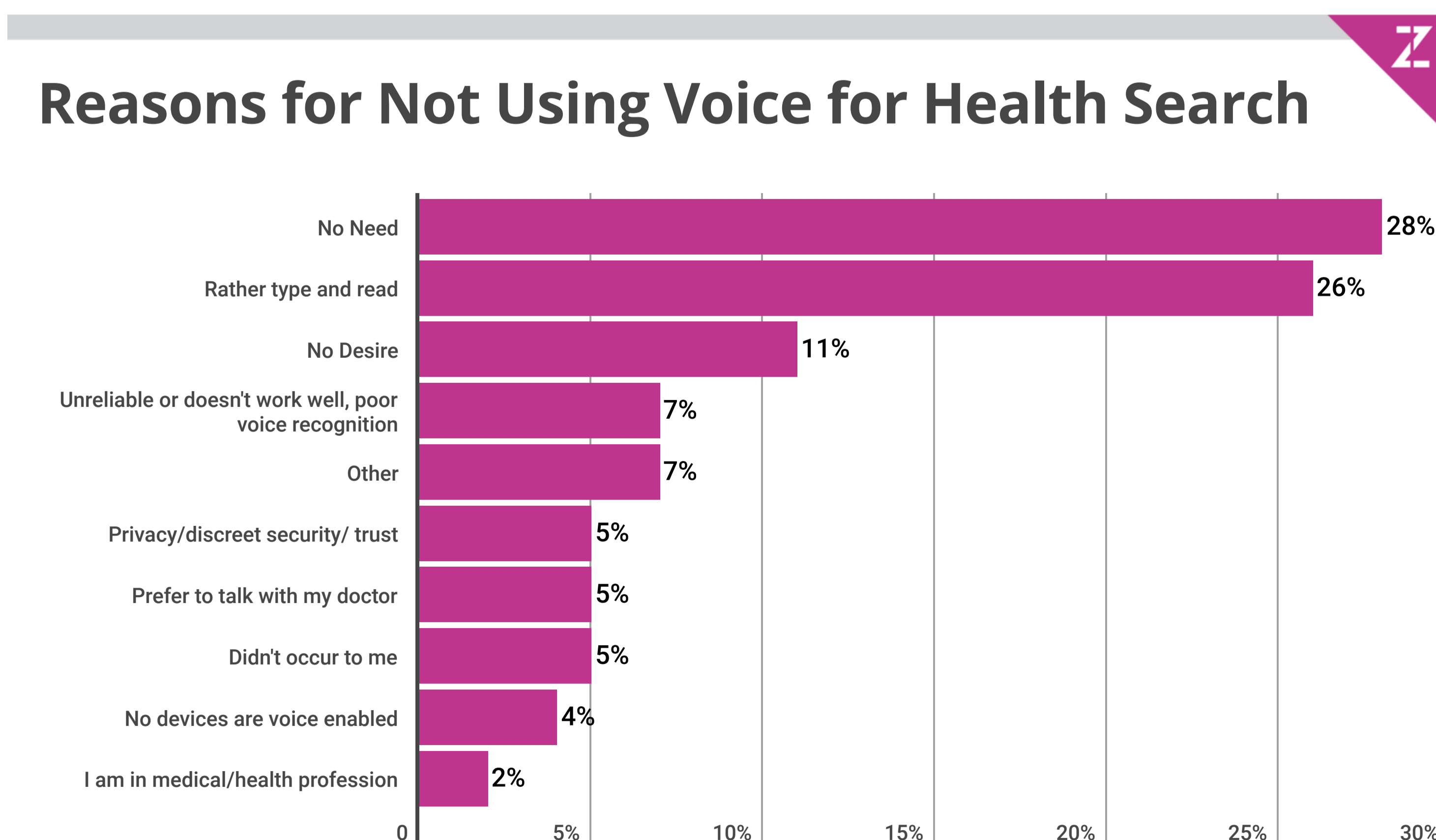


Both those 29 and younger, and those 45 and older, use voice-enabled devices to obtain health information less frequently than those 30 to 44. Across all ages, the most popular health topics searched for via voice are related to symptoms and treatments of health conditions.

RESISTANCE

Depending on who you listen to, everything is heading toward voice search. That may prove true one day, but not yet . . . and certainly not for searches related to health. Here's a look at the 76% of consumers who are *not* currently using voice to search for health information. See Figure 4.

Figure 4



At 28%, the most common reason given for not using voice search for health topics is not having a need to do so. The second most common reason (26%) is a preference for typing keywords into a search engine and reading text on a screen. Since the dawn of the internet—and especially since Google was launched in 1998—we've been trained to find answers to a question by typing and hitting "enter." We're comfortable searching with our fingers, which may account for the resistance to voice search. That seems to be especially true for health topics, which are often personal in nature. The 11% of respondents who said they have "no desire" to use voice search for health topics may also be those who prefer physically querying search engines. A meaningful number (5%) of consumers cite privacy concerns.

PUTTING THE DATA TO WORK

The implications of our findings for managing and marketing healthcare organizations through web-based content are two-fold. First, with more than 75% of people saying they don't use voice search for health topics, healthcare organizations should not be too quick to revise their content strategies. This is especially true given that, over time, natural language processing, aggressively being pursued by both Google and Microsoft, will more and more match the "intent" of consumers' queries with appropriate web content, without marketers reformatting said content. Second, while we shouldn't ignore the 25% of consumers who are embracing voice search for health information, from finding a doctor to learning about ailments, marketers' approaches should not be to keyword-stuff natural language phrasings into long-form web content, but instead to stay up-to-date with the approaches that search engines are using to address natural language processing. In particular, marketers should avoid attempting to game the SEO/content landscape and accept that Google's and Microsoft's intent is to understand the relationship among words (using approaches such as word vectors) and to direct their long-form content marketing development efforts accordingly. This however, does not mean that marketers should stop seeking and embracing new applications for voice search. Where short-form interactions and answers make sense, content will indeed require a completely new structure for non-screen-based user interactions.