Diversity potentials study: Wearables

design-people
Let’s create winning experiences
Why this research?

The wearables market expands with 2 digit growth rates annually (according to an analysis by Gartner*) with a potential for going from niche to a mainstream market.

As wearables typically are personal products, your market success depends on your ability to translate subtle consumer preferences to appealing wearable experiences. Smart watches and wrist bands are currently the dominant wearable products. design-people’s “Tech-user Navigator” study shows a clear gendered use pattern of women preferring wrist bands and men buying smart watches. Why is this so – and what can we learn from analysing men’s and women’s user experiences that lead to more appealing wearables and thereby support you and your businesses?

This is what our limited user study is about. We share the results to inspire you and to give you a notion of how you can address gender dynamics around wearable use in your favour.

Enjoy your read – and let us know if you have questions or comments.

The design-people team

*http://www.gartner.com/newsroom/id/3198018
The wearables category - a definition

Wearables are electronics that can be worn on the body, either as an accessory or as part of material used in clothing. One of the major features of wearable technology is its ability to connect to the Internet, enabling data to be exchanged between a network and the device.

Investopedia.com
Wearables use – data on gender differences

From the Tech-User Navigator survey*

71% of smart watch users are men

55% of smart band users are women

*Based on 1,200 respondents in EU, The Tech-User Navigator, 2015
Wearables user experience - and gender
A limited qualitative user study

Respondents
8 users of wearables - the type of wearable was not specified in the recruitment
50% women & 50% men*
Age 24-51

Methodology
Semi-structured interviews
Ethnographic observations
- all conducted at the users’ own home
Expert analysis & recommendations

Geography
Denmark

*The male respondents in this research all worked with technology, which likely influences their attitude towards and use of technology. Thus their user preferences are slightly more tech-friendly than the male average.
Women and their wearables

Pernille, 42
Married
One younger child
Masseuse

She uses it for running three times a week

“My smart band works as a personal trainer”

Stine, 36
Lives with her boyfriend
Two small children
Works at post office

She uses it everyday to track her activity

“My smart band encourages me to be more active”

Caroline, 48
Divorced
Two younger children
Lawyer

She uses it everyday to track her activity

“It motivates my to walk my daily 10.000 steps”

Petra, 24
Lives with her boyfriend
No children
Student, former elite swimmer

She uses it for running a few times a week

“It helps me track my physical development”
Female wearables experiences
Motivations and barriers

Pernille, 42
- It makes me run faster
- It has a training program
- It praises me
- It doesn’t have a map so that I can see where I’m running
- I can’t send data directly to my computer
- It is too big
- I don’t want my wearable to make me less present

Stine, 36
- It motivates me to be more active with graphics and colours rather than just numbers
- I can set activity goals for myself
- It is bad at tracking movements
- I don’t want my wearable to make me less present

Caroline, 48
- It motivates me to be more active
- The design is small and discreet
- I like that it doesn’t tell you when to train
- It doesn’t have a heart rate monitor
- I don’t want my wearable to make me less present

Petra, 24
- It makes me run faster
- It is easy to use
- I can take the strap off and clean it
- The heart rate monitor is not good enough
- The design is too sporty for everyday use
- I would like to be able to see both my speed, distance and cadence at the same time
Men and their wearables

**Daniel, 28**
Lives with his girlfriend
No children
Data specialist

He uses it for everyday use, mainly to track things as sleep and movement

“It has changed the way I sleep forever”

**Steffen, 35**
Lives with his girlfriend
One newborn baby
IT engineer

He uses it for everyday use, it mainly works as an extension for his phone

“I’m less stressed now that I no longer have my phone in my hand all the time”

**Michael, 51**
Married
One older child
IT responsible at a high school

He uses it for everyday use, used mainly as a watch

“I bought it because I thought it was fun”

**Erik, 37**
Married
One younger child
Chief technology operator

He uses it for running a few times a week

“If I want to push myself I’ll take my watch with me when I’m running”
Male wearables experiences
Motivations and barriers

**Daniel, 28**
- **❤️** It tells me if I haven’t slept enough so that I can change that.
- **❤️** It gives me more peace, because I know right away why my phone is vibrating, and I never miss a call or a text.
- **❤️** It is fun to track myself.
- **❤️** It is too expensive.
- **❤️** It doesn’t have a heart rate monitor.
- **❤️** It should look more like a “real watch”.

**Steffen, 35**
- **❤️** It makes me more present in the moment, because I don’t look at my phone all the time.
- **❤️** I can track my activity during training.
- **❤️** I like the toy-look.
- **❤️** It doesn’t have a heart rate monitor or a GPS, which would be nice during training.

**Michael, 51**
- **❤️** It is fun to play with.
- **❤️** I like that I can keep exploring new features.
- **❤️** It can communicate with my phone and my computer.
- **❤️** It is too expensive.
- **❤️** The design is not that great.

**Erik, 37**
- **❤️** The Smart Band makes me run faster.
- **❤️** The design is too sporty for everyday use.
- **❤️** The band has too many functions compared to what I need.
- **❤️** The screen is too small.
- **❤️** The battery is not good enough.

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design-people.com
Our conclusions
Why do women prefer smart bands?

Women tend to choose the typical smart band because:

- It offers a clear and limited benefit / functionality
- Transparency around real life benefits
- Simplicity in use
- Discreet design

Men tend to choose the typical smart watch because:

- There is hype and status around the product category
- Unlimited possibilities of feature evolution and exploration in use

55% of smart band users are women
71% of smart watch users are men

The Tech-User Navigator, 2015

71% of smart watch users are men
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What matters to him and her in wearables

**Enrich my life**
The female wearables consumer is driven by a pragmatic need, she wants a wearable because it can improve her everyday life. Typically helping and assisting her to be more active.

**Wearables are tools**
When using her wearable she has a goal oriented approach. She has an aim during use, e.g. to see number of steps during the day. She wants to get from A to B quickly and without hassle.

**Discreetness & privacy**
She is private around her wearable and favours a discreet look.

**It is new and exiting**
The male wearables consumer is driven by his curiosity for new technology. He does not initially have a specific need in mind when researching new technology but his purchase is driven by a fascination for features he wants to try out himself.

**Wearables are toys**
When using his wearable he is less focused on a specific aim he needs to reach, rather he is explorative in use and takes many detours when discovering new features and entries.

**Worn to be noticed**
The wearable is a statement to be noticed by others.
Our recommendations for successful wearables experiences
Creating winning experiences in wearables

The device

...for her

- Make it personal - she uses it as a means to achieve a goal or a dream about being more active
- Aesthetics should fit her everyday activities – it is always on. Make it discrete and simple
- The wearable should be subordinate – don’t be invasive with push notifications or random information
- Provide her with a holistic visual display of her activity (relevant status information), not just numbers
- Make products easy and fail-proof to use

...for him

- Impress and surprise him - remember a WOW! Factor
- The product functions as status symbol
- Aesthetics should fit his everyday life and be noticeable - he wants to show it off
- Tech vibe is welcome
- Provide him with number-based display informations
Creating winning experiences in wearables

The app

...for her
• Think ‘Personal Assistant’ rather than ‘Dictator’
• It should be rewarding and positive – not punishing
• Support her in her training
• Only provide her with functions she needs
• Provide the possibility of self tracking
• Provide her with a holistic visual of her activity, not just numbers

...for him
• Focus on freedom of use – leave him room to explore
• Make sure the app evolves – the process of configuration is as much fun as the end means
• Challenge him
• Provide the possibility of self tracking
• Provide him with number-based information
Creating winning communication in wearables

The communication

...for her

• Create meaning around your wearable
• Provide her with crystal clear benefits
• Reach her through trustworthy sources (community, reviews, peer testimonials, etc)
• Explain and show the ease of use
• Onboarding is supported by her network and recommendations

...for him

• Create hype around your wearable
• Never talk down to him
• Provide him with expert knowledge
• Tickle his curiosity – use teasers and viral methods
We hope you enjoyed the read of this study which activates a diversity lens on use preferences in the wearables category, extracting preferences specific to men and women. The study is far from covering all aspects of use and user segmentation - but hopefully you found some new and inspiring aspects of value to you.

At design-people, we have successfully supported our clients in increasing their revenues by providing a range of Inspired by Women services, carried out by our expert team.

Contact us to discover what you and your company can further achieve - and let’s create winning experiences together.
design-people is an award winning Scandinavian innovation and design firm with an international outlook and a strong focus on customer experience.

We help companies explore and understand target group preferences in their business sectors. And with our skills in innovation, design and communication, we help them translate these insights into winning customer experiences.

As our work creates remarkable business results, we have been able to attract renowned clients like Danfoss, Nilfisk, Vifa, Kenwood, LG and Microsoft.

Over the last 10 years, design-people’s clients have received more than 25 international innovation & design awards for product design and digital services. These recognitions go along with substantial progress in sales and brand value.

Whenever appropriate, we involve female users as a benchmark and inspiration to create innovative user experiences, attractive designs and effective communication. Women constitute fast growing buying power all over the world – but they are underrepresented in tech-development. This opens a window for growing our clients’ businesses by giving them a competitive edge in terms of women’s purchase decisions. Our research and experience in this field reveals that a female benchmark strategy leads to solutions that are attractive for the mainstream market.

Our diverse team of 15+ consists of market & user insight experts, experience innovators, product & digital designers as well as communication experts. Thus, we can offer you valuable assistance in delivering winning customer experiences in the growing digital economy.

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Let’s create winning experiences!