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# Consumer Mindset Shifts Due to COVID-19

Research Report

# Research Objective

Leverage a survey approach to better understand the mindset of potential customers in a public space during a pandemic and **gauge their reaction to initial experience ideas** to guide the vision for the customer journey of the future for our clients.



# Demographics

We surveyed **203 respondents** in June of 2020

## Age



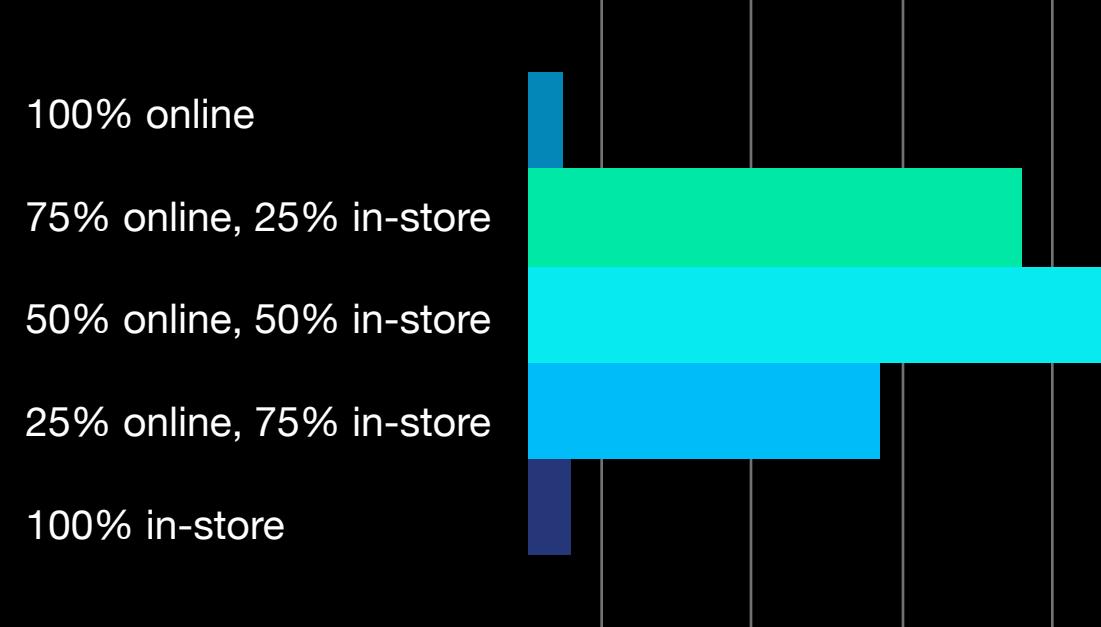
## Country



## Industry

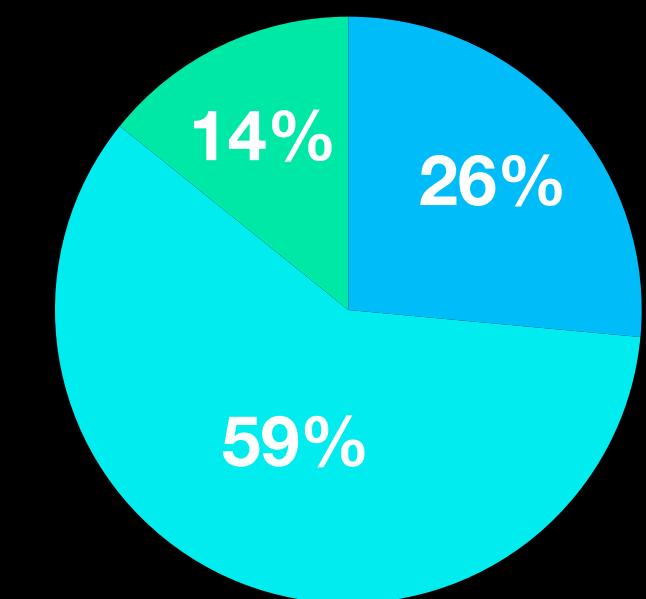


## Shopping Behavior



## In-Store Shopping Frequency

- A few times a week
- A few times a month
- A few times a year



**96%** have interacted with a digital screen in a public space in the past

\* Canada, Denmark, Germany, India, Netherlands, Spain, Ukraine, United Kingdom

## Good news for retailers

**85%**

of people will likely head back to stores soon after restrictions are lifted

*however*

most will only return to stores with **reservations and other precautions that ensure social distancing**



## Challenges for retailers

**45%**

will likely not be willing to touch a digital screen in a public place following the pandemic

*which means*

**we are at risk of losing almost half of our user base**

Note: 14% more males than females would be willing to touch a screen



How might we...

# innovate on the traditional touchscreen interaction

We tested **consumer reception** of the following touchscreen additives

- / Provide hand sanitizer
- / Let people use phone as controller
- / Use of self-cleaning screens
- / Provide a personal stylus
- / Allow for gesture control
- / Allow for voice control
- / Allow for eye tracking that controls the screen

# Along with providing hand sanitizer, consumers are most likely to interact with a screen using their personal device as a controller



*Most people do not understand how eye tracking can/will work*

Eye tracking  
that controls  
the screen

Voice control

Touchless  
control using  
gestures

A self cleaning  
screen

My own  
personal stylus

Control the screen  
using my  
personal device

Provide  
hand sanitizer

Least  
Likely to  
interact

Most  
likely to  
interact

Opportunity  
for Innovation



*Low tech solutions will go a long way to keep consumers interacting with a touch experience*

# Phone as controller

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Overall best reception

- / Previous experience: 71%
- / Ease of use: 92%
- / Overall satisfaction: 8/10
- / Comfort using in public: 8/10

\*Scores were averaged and rounded to the nearest whole number

\*\*Please reach out if you are interested in seeing the qualitative responses behind these numbers

# Voice Control

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Questionable functionality and privacy concerns

- / Previous experience: 89%
- / Ease of use: 86%
- / Overall satisfaction: 6/10
- / Comfort using in public: 5/10

# Gesture Control

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Interesting, but unbelievable

- / Previous experience: 66%
- / Ease of use: 76%
- / Overall satisfaction: 7/10
- / Comfort using in public: 7/10

# Phone as Controller

" Voice control seems annoying and more time consuming. **Ability to just use my one phone seems great.**"

" Would not be as willing to use if I **have to download something** to my phone or it takes more than a few steps on my phone."

"**I much prefer using QR code type communication** btw my phone and the public screen, rather than having to download an app"



# Voice Control

“ When I’ve tried it, I found voice control to be lacking the functionality that I needed. Furthermore, I would not be inclined to use it in public for two reasons. First, with more people using it, the volume in the space. Second, **I wouldn’t want other people or devices listening to what I’m saying.**”

**“Voice device in public would be obnoxious, especially with multiple people checking out around each other”**

“ I would prefer to **speak to an actual person** vs. working with voice controlled screen.”



# Gesture Control

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“ If it didn't make me look like an idiot... **Many times the gestural stuff make the user look very strange** like they're fighting an invisible spider.”

“ I'd be open to try, but I have **little faith that the barrier-to-entry would be low enough** or intuitive enough to just pick up and use.”

“ It would have to be very intuitive and visual. Fun. **Simple interactions would prob work best.**”

difficulty plenty of attention  
low patience challenge long time  
motor skills mask problem norm  
minority report least contact  
good reason options movement  
shopping error  
individual people preferences  
gesture tune

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**Reach out for  
more research  
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