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Consumer Mindsets Post (during) 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



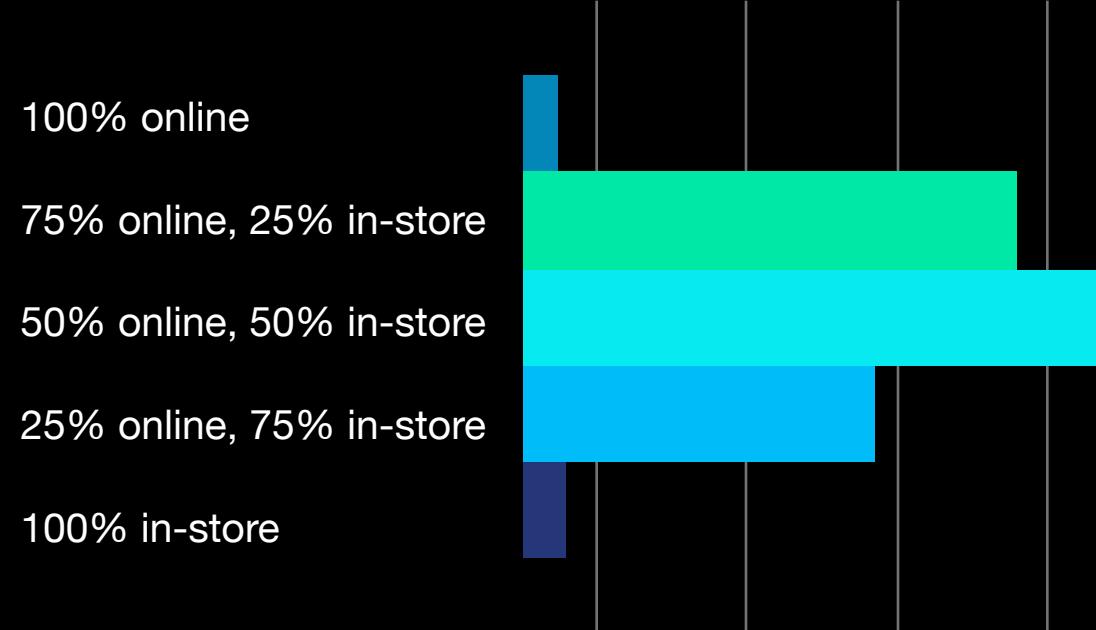
Country



Industry

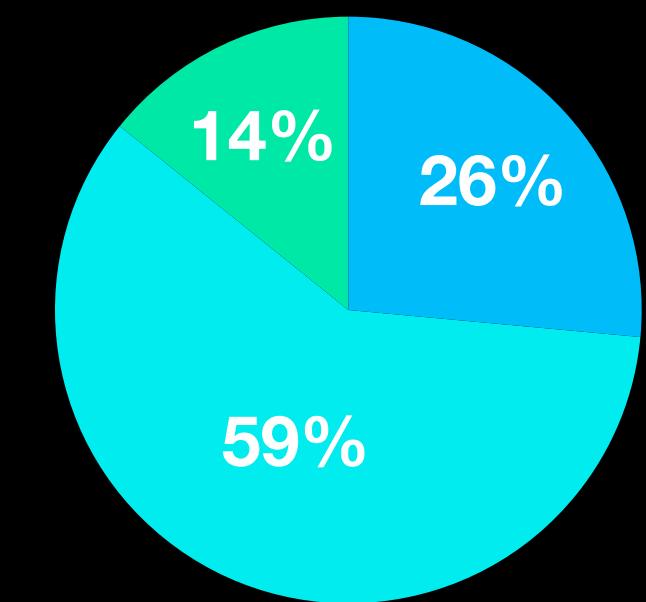


Shopping Behavior



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

Overall best reception

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

*Scores were averaged and rounded to the nearest whole number on a scale of 1-10

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

Voice Control

Questionable functionality and privacy concerns

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

Gesture Control

Interesting, but unbelievable

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

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

“ 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 preferences
individual people tune
gesture

valtech.

**Reach out for
more research
details**

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