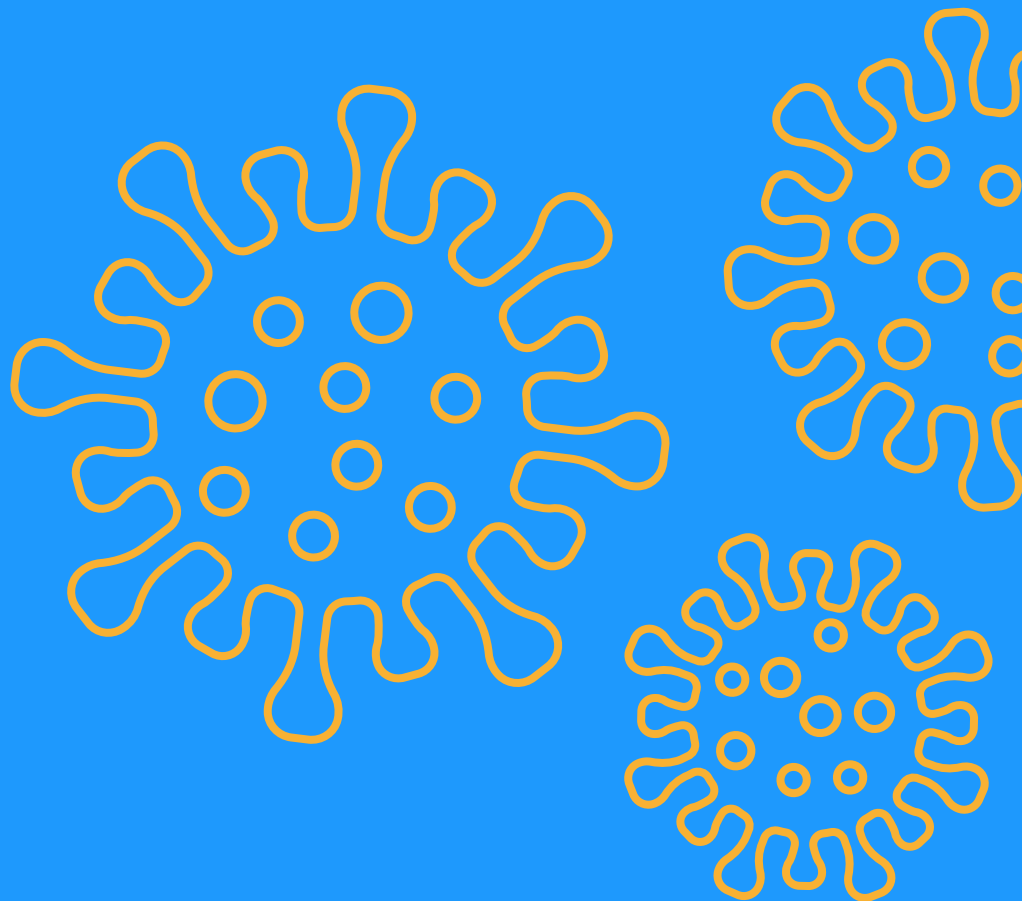


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# Customer Expectations of Service Delivery During COVID-19

Survey Report

2020



# Defining service delivery excellence in uncertain times

The COVID-19 pandemic has not only posed unprecedented operational challenges to customer service organizations – it has also transformed customer expectations. With higher demand than ever and safety top of mind for millions, we carried out an in-depth study of what consumers want when it comes to technical support and technician visits to their homes.

A representative survey of U.S. adults was designed and conducted online. It explored safety concerns and evolving customer demands regarding home technology, service delivery and technician visits for issues such as installing routers and TV set-top boxes, and fixing home appliances or HVAC systems.

## Survey goals

- Explore safety concerns and changing customer demands from companies when it comes to residential technician visits
- Determine whether consumers are more willing to complete more tasks using remote guidance or self-service channels due to safety concerns
- Investigate how safety concerns affect brand loyalty, and how safety matters in relation to other considerations such as price

## Methodology

This report is based on a total of 1,065 completed surveys from a nationwide sample of U.S. adults (18+) using an online panel. The surveys were completed on Monday, May 4th and Tuesday, May 5th, 2020. The gender distribution was 44% male and 56% female. The overall margin of error for the survey is +/- 3.0% at the 95% confidence level.



# Key insights

## Demand for technical support is currently very high

Almost two-fifths (37%) of U.S. consumers have required technical assistance during the COVID-19 pandemic. In a majority (57%) of cases, support was provided remotely – either over the phone (34%), over video call (22%) or with the technician dropping off equipment and remotely guiding the customer from a safe distance (19%).

## Consumers are uncomfortable with allowing technicians into their homes

Three-quarters (75%) would rather avoid technician visits due to safety concerns unless it's really necessary, almost half (47%) would allow an outdoor visit only, and one in five (20%) would avoid the visit in any case.

## Consumers are more willing to do things by themselves - being the hands of a technician

More than three-fifths (61%) are willing to complete more tasks with remote guidance to avoid technician visits and over half (51%) claim they tend to resolve more issues by themselves during the pandemic.

## If a visit is unavoidable, customers expect the company to meet their safety concerns

Two-thirds (68%) expect the company to make sure the technician visit is as short as possible, more than three-fifths (63%) want the company to send no more than one technician, and just under three-fifths (57%) expect the company to fix issues as quickly as before the pandemic. They also want companies to apply safety protocols such as protective equipment (80%), six-foot social distancing (75%), and sanitization of tools (59%).

## Safety concerns are evolving as critical to brand loyalty

Two-thirds (66%) would prefer a company that is innovating with remote support tools, while three-fifths (60%) would consider leaving a company that did not meet their safety expectations.

## This preference for extra safety is more important than price

More than two-thirds (68%) would give preference to companies taking extra technical support safety precautions, even if they were a little more expensive.

## Remote Visual Assistance is emerging as a key technology for tech support during the COVID-19 crisis

22% of consumers who required tech assistance were remotely guided by a technician using video. When given a choice of methods for receiving technical assistance during the pandemic, just as many consumers chose guidance by a technician using video as remote guidance over the phone (20% each).





## Many U.S. consumers have needed a technician during COVID-19, with high uptake of remote support

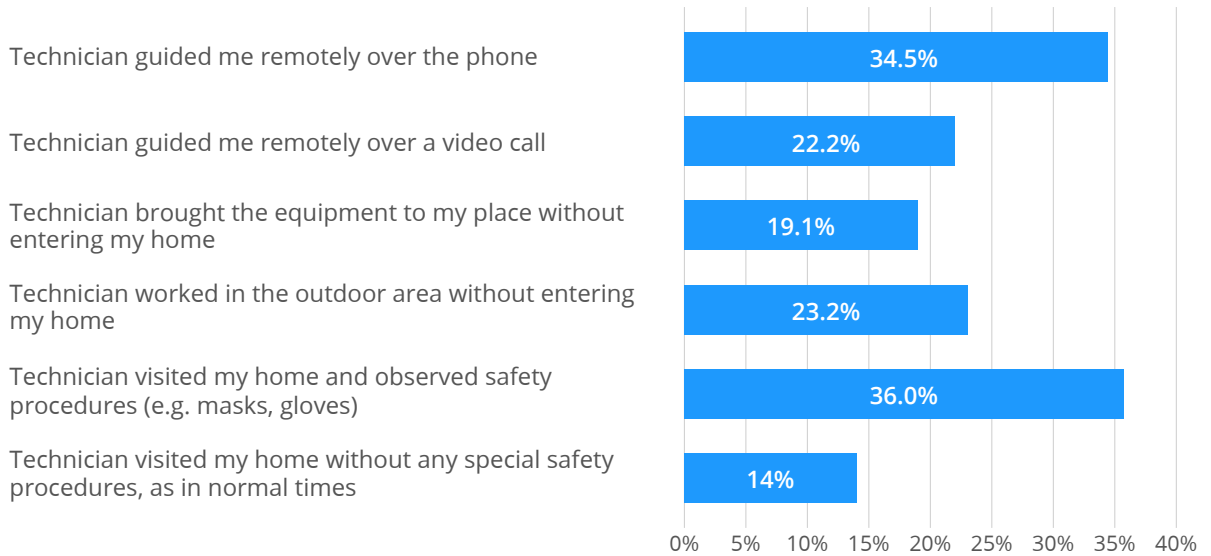
Almost two-fifths (37%) of U.S. consumers have required technical assistance during the COVID-19 pandemic.

People under 45 were more likely than those over 60 to have required assistance. Only one-quarter (25%) of consumers over 60 have required a technician's assistance compared to more than two-fifths of consumers under 45 years of age (45% - 18-29 years of age; 44% - 30-44 years of age).

A majority (57%) of respondents said that support was provided remotely in some manner. In one-third (34%) of cases, the technician guided them remotely over the phone, while 22% were guided remotely over a video call or had the technician bring the equipment to their place, without entering the premises (19%).

## Q How was the technician assistance provided?

Please select all that apply.

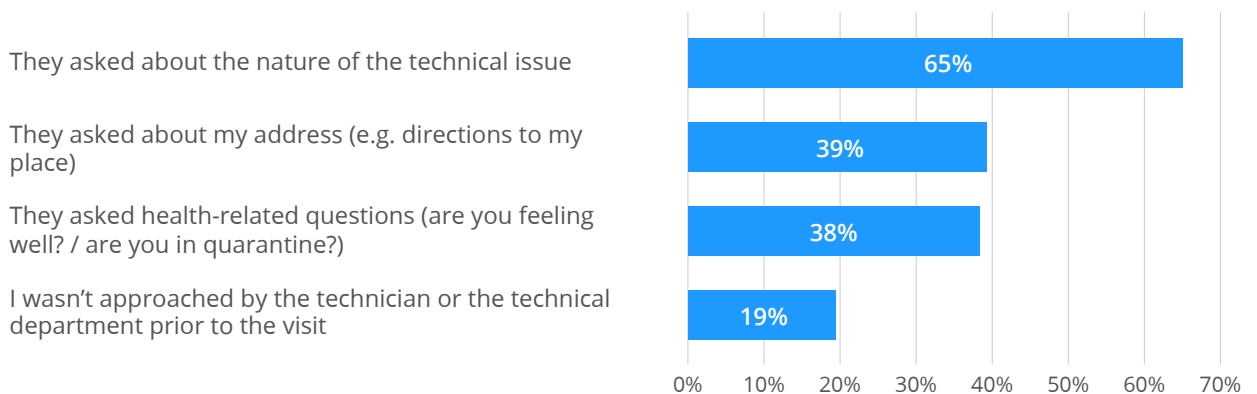


Consumers under 45 were more likely than those over 45 to have received remote assistance. Around two-thirds of consumers under 45 received remote assistance from a technician (69% - 18-29 years of age; 64% - 30-44 years of age) compared with less than half of consumers aged 45 or above (47% - 45-60 years of age; 44% - over 60 years of age).

Among consumers who had a technician visit their homes, nearly two-thirds (65%) said the technician or technical department asked about the nature of the issue prior to the visit. Two-fifths (39%) were asked about their address and 38% were asked health-related questions, such as how they were feeling or if they were in quarantine.

## Q What questions were you asked by the technician or technical department prior to the visit?

Please select all that apply.



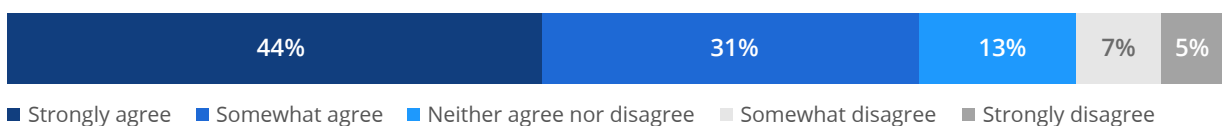
Among those consumers who had a technician visit their homes, nearly nine in ten (87%) were satisfied with the safety precautions taken during the visit by the technician.



## Consumers are uncomfortable with allowing technicians into their homes

Many consumers are currently reluctant to allow technicians into their homes. Three-quarters (75%) agree that they would rather avoid technician visits due to safety concerns unless it's really necessary.

### Q I would rather avoid a technician visit unless it's highly necessary due to safety considerations



Almost half (47%) of consumers said that they would allow a technician to fix something in the outdoor area of their property, but not indoors. Less than three in ten (28%) disagreed with the statement, while one-quarter (25%) said they neither agreed nor disagreed.

### Q I would allow a technician to fix something in the outdoor area of my house, but not indoors





# Consumers are more willing to act as technicians than before the pandemic

Consumers are more willing to do things by themselves than they were before the pandemic. Over half (51%) claim they would prefer to fix more things independently than before the pandemic due to safety considerations, while only one in five (22%) disagree with the statement.

## Q I tend to prefer fixing more things by myself than before the pandemic due to safety considerations



Over three-fifths (61%) of consumers say they are willing to resolve more issues with remote guidance (being the hands of technicians) due to safety considerations, while less than one-fifth (19%) are unwilling.

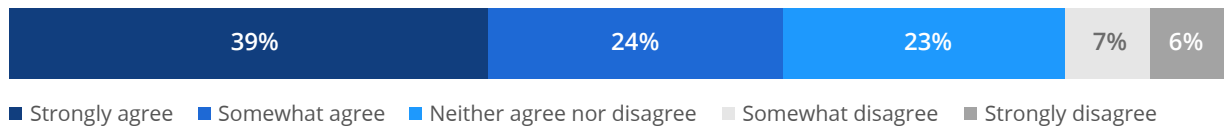
## Q I would rather fix things by myself with remote guidance than have a technician visit due to safety concerns



# Consumers expect companies to meet their safety concerns in a variety of ways

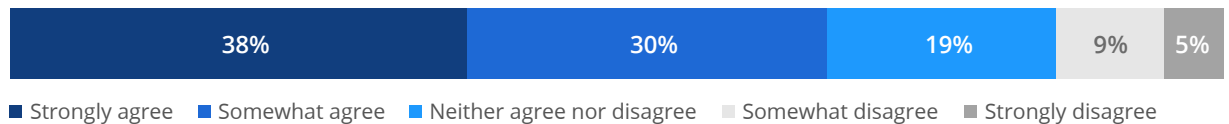
If a technician visit is unavoidable, customers expect the company to meet their safety concerns in a variety of ways. Just over three-fifths (63%) said that they expect the company to send no more than one technician. Only one in seven (13%) do not expect the company to send only one technician while almost one-quarter (23%) neither agree nor disagree.

## Q If a technician needs to come to my place, I expect the company to send no more than one technician



Consumers expect these technician visits to be shorter during the pandemic, regardless of how the question is phrased. More than two-thirds (68%) also expect the company to make sure that a technician visit will be as short as possible, while nearly three in five (57%) expect companies to fix issues during the pandemic as quickly as before.

## Q If a technician needs to come to my place, I expect the company to make sure that the visit will be as short as possible, more so than in normal times



## Q I expect companies to fix issues during the pandemic as quickly as before

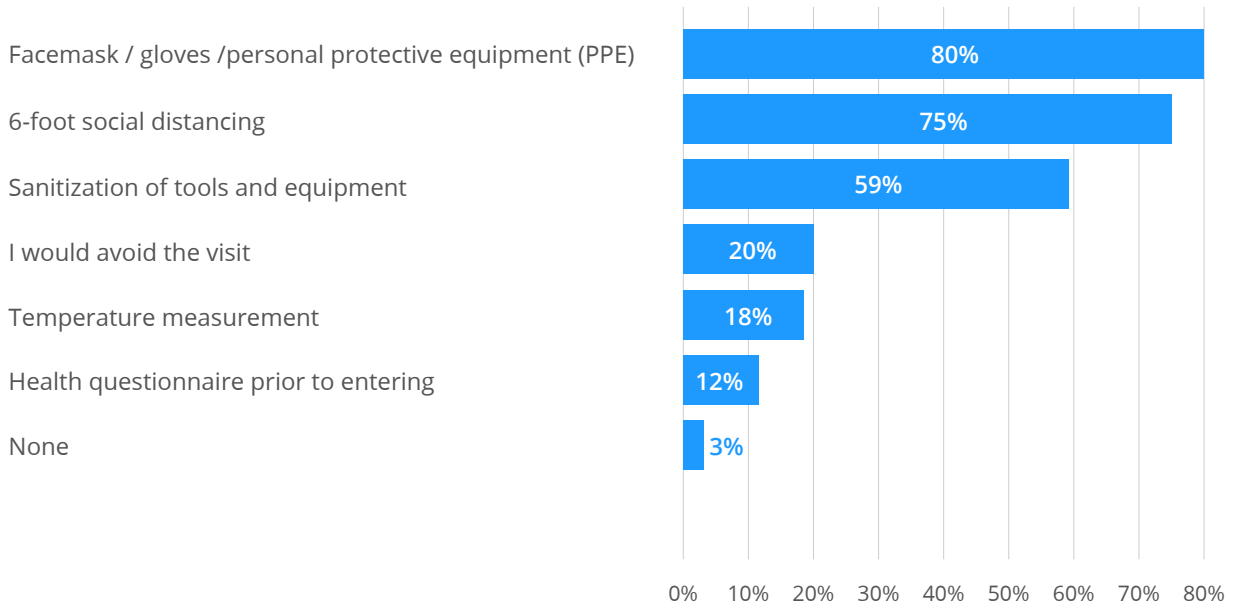




A majority of consumers expect technicians to take three specific safety precautions. Top of the list is wearing personal protective equipment (PPE) such as a facemask and gloves (80%), followed closely by six-foot social distancing (75%). Almost three-fifths (59%) want the technician to sanitize their tools and equipment. Few consumers expect a technician to do either a temperature check (18%) or conduct a health questionnaire prior to entering their place (12%).

**Q If a technician is required to visit your place, what safety precautions do you expect them to exercise?**

Please select all that apply.

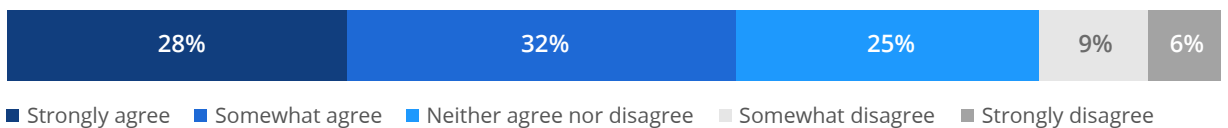




## Brand loyalty is tied to meeting customers' safety concerns

Safety concerns are emerging as critical to brand loyalty. Three-fifths (60%) would consider leaving a company following a technician visit that did not meet their safety expectations.

**Q** I would consider leaving a company following a technician visit that did not align with my safety expectations



Slightly more consumers would prefer a company that is innovating with remote support tools. Two-thirds (67%) agreed, while less than one in ten (9%) disagreed that they would be more loyal if a company is innovating ways to offer remote support during the pandemic, to eliminate technician visits.

**Q** I would be more loyal to a company that is innovating ways to eliminate technician visits



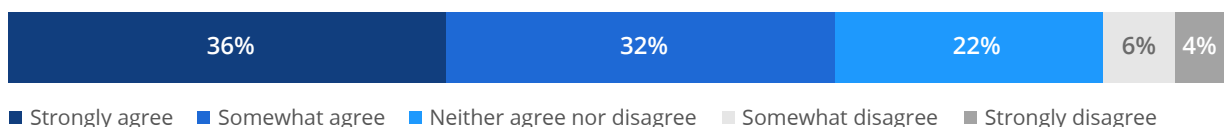


## Safety is emerging as a more critical consideration than price



This preference for extra safety is more important than price. Over two-thirds (68%) of respondents say they would give preference to companies taking extra technical support safety precautions, even if those companies were a little more expensive. Only one in ten (10%) consumers disagreed with this statement.

**Q** I would be more loyal and give preference to companies that took extra safety precautions with regards to their technical support, even if they were a little more expensive



Surprisingly, this is true regardless of income level, with more than three-fifths of consumers in every income group agreeing.



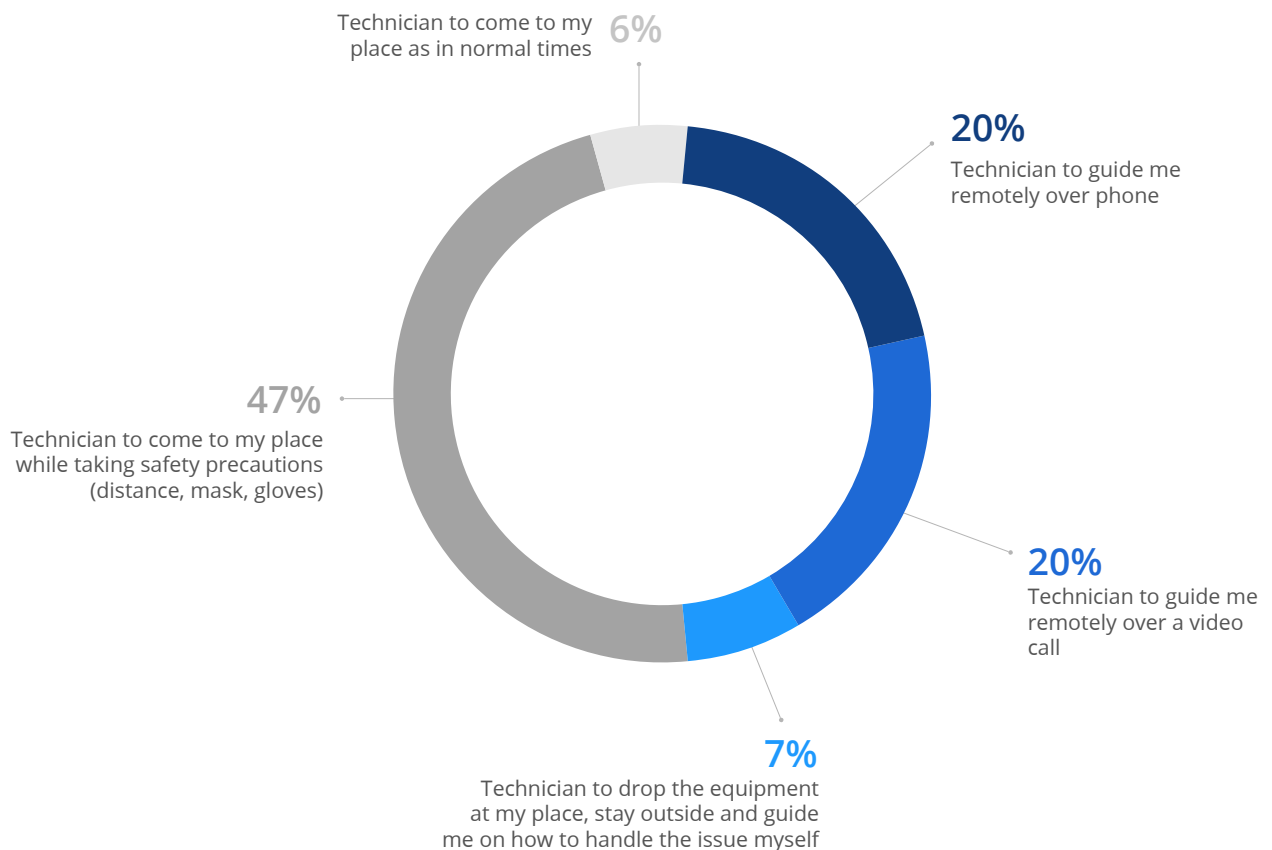
# Remote video support is emerging as a key technology to ensure safety

Remote Visual Assistance is emerging as a key technology for tech support during the COVID-19 crisis, especially among younger consumers. As mentioned above, over one-fifth (22%) of consumers who required technical assistance during the current pandemic were remotely guided by a technician using video, jumping to one-third (34%) of consumers under 30 years of age. In comparison, only one in seven (14%) consumers between the ages of 45 and 60 and

just one in ten (10%) consumers over 60 years of age have received this type of guidance.

When given a choice of methods for getting technical assistance during the pandemic, just as many consumers chose to be guided by a technician using video as would want to remotely be guided over the phone (20% each). Just under half (47%) want the technician to visit, while taking safety precautions such as social distancing or wearing a mask and gloves.

## Q What would you prefer if you face a technical issue that involves a technician during the pandemic?



The younger the consumer, the more likely they are to prefer being guided over video with one-quarter (24%) between 18 and 29 years of age preferring this method, compared to just one in seven (14%) consumers over 60 years of age.

# Summary

With safety the primary consideration for consumers during the COVID-19 pandemic, the precautions taken by field service organizations and their employees are now critical to customer satisfaction and brand loyalty. Furthermore, consumers are both less likely to allow technicians into their homes and more willing to play an active role in the resolution process, especially with remote Visual Assistance tools.



# About TechSee

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