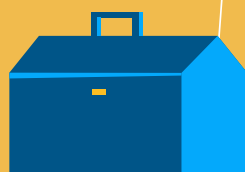
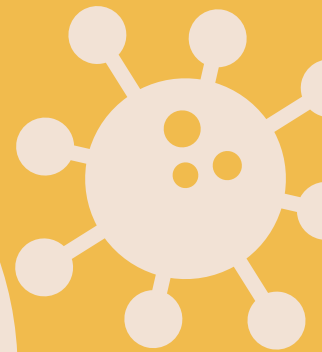
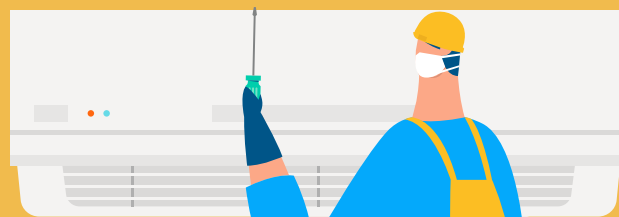


# Customer Expectations of Service Delivery During COVID-19 Pandemic

## Survey Report



# Defining service delivery excellence in uncertain times

As we move into 2021 with the COVID-19 pandemic, customer service organizations are still facing unprecedented operational challenges. U.S. consumers remain uncomfortable with allowing service technicians into their homes, and no change is in sight despite the ongoing vaccination rollout.

One thing is clear: consumers expect service companies to meet their safety concerns during this time and beyond, and these concerns are becoming critical to company loyalty in this new environment. A representative online survey of U.S. adults was designed to explore safety concerns and evolving consumer 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. This survey was a followup to identical surveys conducted back in May and October.

## Survey goals

- 1 Explore safety concerns and changing consumer demands from companies when it comes to residential technician visits
- 2 Determine whether safety concerns have prompted consumers to be more willing to complete tasks with remote guidance or self-service channels
- 3 Discover whether the upcoming vaccine will have an impact on consumer sentiment around service delivery
- 4 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 921 completed surveys with a nationwide sample of U.S. adults (18+) using an online panel. The surveys were conducted on January 2nd, 2021. The gender distribution was 46% male and 54% female.

The October survey results have been compared with a survey completed in May 2020 with 1,065 U.S. adults (18+) using an online panel and a survey conducted in October 2020 with 560 U.S. adults (18+) using the same online panel.

921 COMPLETED SURVEYS



46%

MALE

54%

FEMALE

# Key insights

## 1 Demand for technical support is currently very high

65% of U.S. consumers have required technician assistance during the COVID-19 pandemic. This is a substantial increase from the survey conducted in May, when 37% of consumers required technician assistance.

## 2 Consumers are still uncomfortable with allowing technicians into their homes

Consumers are still cautious about technician visits. 65% of consumers agree that they would rather avoid technician visits due to safety concerns unless absolutely necessary, a number that is only slightly lower than the 75% who agreed with the statement back in May. One in eight (12%) of consumers said that they would avoid the visit at any cost.

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

Consumer expectations remain high with 62% expecting companies to fix issues during the pandemic as quickly as before. 60% expect the company to make sure that the technician's visit is as short as possible and 55% want the company to send no more than one technician. Four-fifths (79%) of consumers expect technicians to take safety precautions such as wearing personal protective equipment (85%) and maintaining six-foot social distancing (74%), numbers that have increased since October.

## 4 Consumers are more willing to do things by themselves — being the hands of the technicians

44% of consumers claim they would prefer to resolve more issues by themselves than before the pandemic due to safety considerations. The high demand for remote assistance is still evident, with more than half

(52%) of U.S. consumers willing to complete more remote guidance tasks due to safety considerations.

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

As lockdowns were lifted, many organizations were still committed to providing remote support. 61% of those needing assistance said that the support was provided remotely in some manner — either over the phone (29%), video chat (17%) or with the technician dropping off equipment at their home and guiding them from a distance (15%). This is also a considerable increase from the facts on the ground just a few months ago, when only 20% of support was provided remotely.

## 6 This preference for extra safety is still more important than price and results in brand loyalty

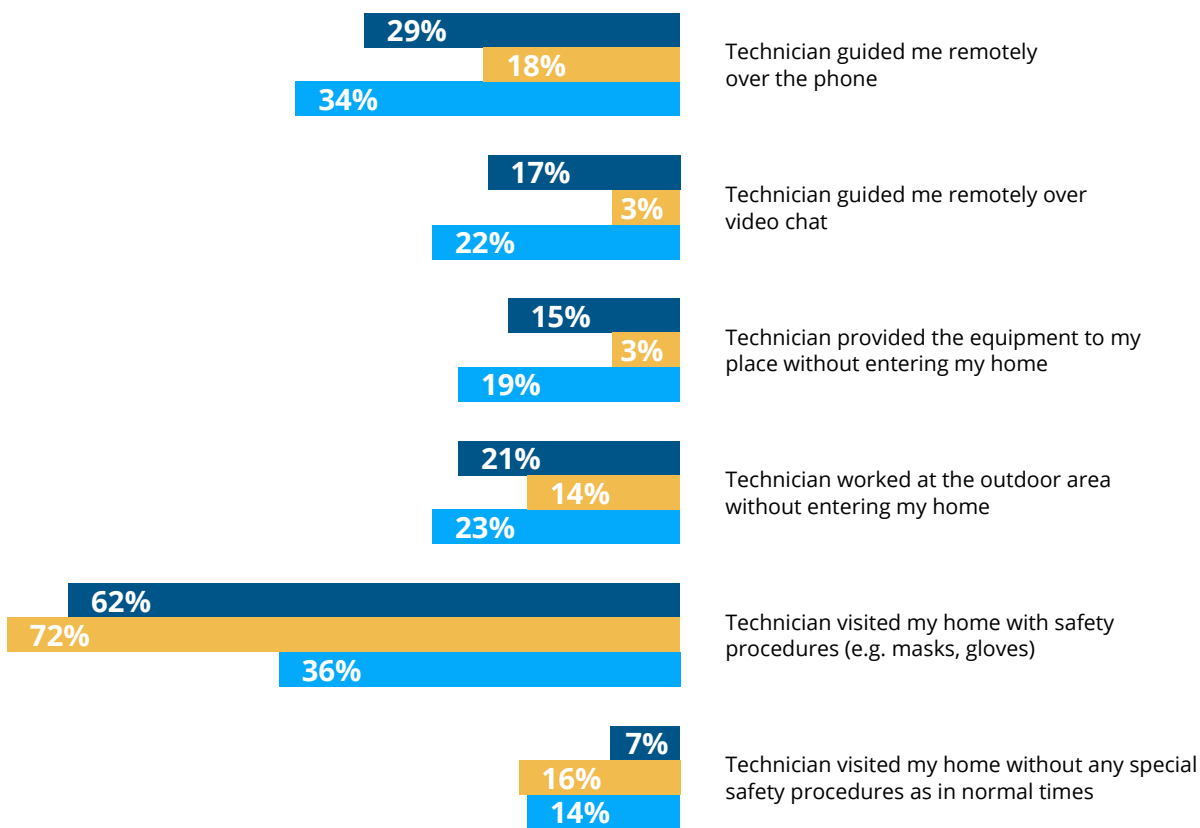
Two-thirds (64%) would prefer companies take extra technical support safety precautions, even if they were a little more expensive, the same percentage as back in May. 61% would prefer a company that is innovating with remote support tools. 60% would also consider leaving a company following a technician visit that did not meet their safety expectations

## 7 Service delivery will continue to be limited in the future despite the vaccine

When it comes to providing customers with on-site support in the future, 45% of respondents say they would prefer to know the technician was vaccinated, and 34% said they would allow the visit only if the technician is vaccinated. Almost half (49%) said they would give preference to a brand that encourages their techs to be vaccinated, but it seems the vaccine may not be enough: 42% of consumers indicated that they would prefer to get remote support and avoid

# Many U.S. consumers needed a technician during COVID-19 and many more utilized remote support

**How was the technician assistance provided?  
Please select all that apply.**

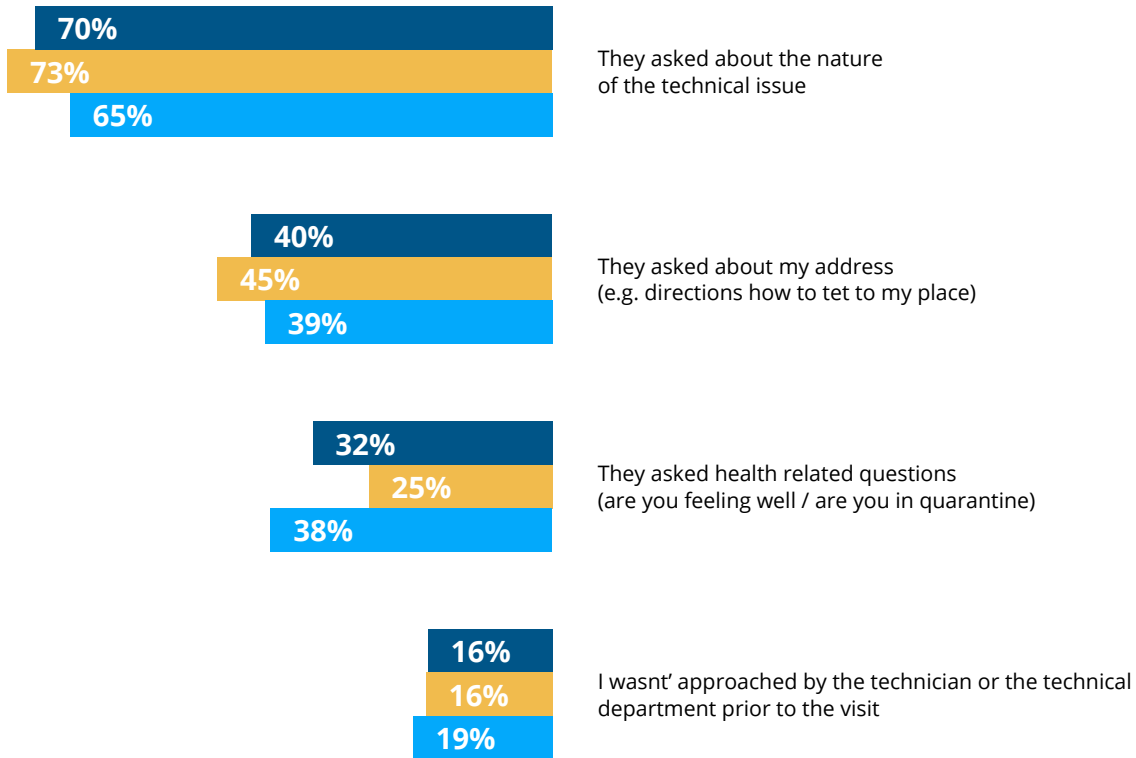


A majority (65%) of U.S. consumers have required technician assistance during the COVID-19 pandemic.

Not surprisingly, as time goes on, more and more consumers require a technician's assistance. (37% required assistance back in May and 45% required assistance in October).

In 62% of visits, the technician visited the home with safety procedures, such as masks or gloves. 61% of respondents said that the support was provided remotely in some manner. 29% said the technician guided them remotely over the phone, while a growing number were either guided remotely over a video call (17%) or had the technician bring the equipment to their residence without entering the premises (15%).

## What questions were you asked by the technician or technical department prior to the visit? Please select all that apply.



Remote visits are up significantly (65%) from back in May at the start of the pandemic when 57% of technician visits were conducted remotely. 62% of consumers report having a technician visiting the home with safety procedures now, a bit less than the 72% in October but almost double the number from back in May (36%). The percentage of consumers saying the technician visited without any special safety procedures has dropped to 7% vs 16% in October and 14% in May).

Among consumers who had a technician visit their home, nearly three-quarters (70%) said the technician or technical department asked about the nature of the issue prior to the visit. There are fewer health-related questions being asked now (32%) than in May when two-fifths (38%) of technicians or technical departments asked health-related questions.

# Consumers are still uncomfortable with allowing technicians into their homes

Consumers still prefer avoiding technician home visits. Three-fifths (65%) of consumers agree that they would rather avoid technician visits due to safety concerns unless it's essential, although this number is less than the three-quarters (75%) who agreed with the statement back in May. One in eight (12%) of consumers said that they would avoid the visit at any cost.

## I would rather avoid technicians visits unless it's highly necessary due to safety considerations.

January '21



October '20



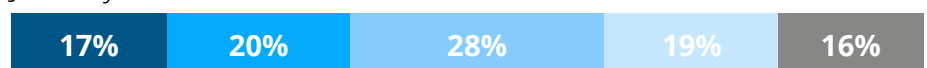
May '20



Also, down from May is the percentage of consumers who would allow a technician to fix something in their residence's outdoor area. 37% agree now, down from 47% who agreed in May.

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

January '21



October '20



May '20



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

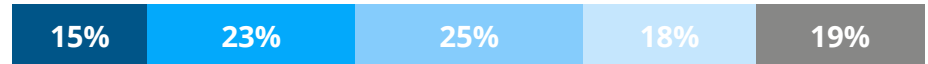
Consumers are split on whether they are willing to do things by themselves (being the eyes and the hands of the technicians) than before the pandemic. Just under half (45%) of consumers claim they would prefer to fix things more than before the pandemic due to safety considerations. This is a decline from May when more than half (51%) were willing.

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

January '21



October '20



May '20



53% of U.S. consumers are willing to carry out more tasks with remote guidance (being the hands of the technician) due to safety considerations than not. Agreement levels have declined slightly from three-fifths (61%) since May.

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

January '21



October '20



May '20



# Consumers expect companies to meet their safety concerns

If a technician visit is unavoidable, consumers expect the company to meet their safety concerns. Consumers prefer shortened technician visits during the pandemic. A majority (60%) expect the company to ensure that a technician's visit will be as short as possible, down from two-thirds (68%) in May. Three in five (62%) expect companies to fix issues during the pandemic as quickly as they did before, a similar percentage as in May (57%).

## I expect companies to fix issues during the pandemic as quickly as it was taking before.

January '21



October '20



May '20



## 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 than in normal times

January '21



October '20



May '20





More than half (55%) of consumers expect the company to send no more than one technician, a percentage that is lower than in May (63%).

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

January '21



October '20

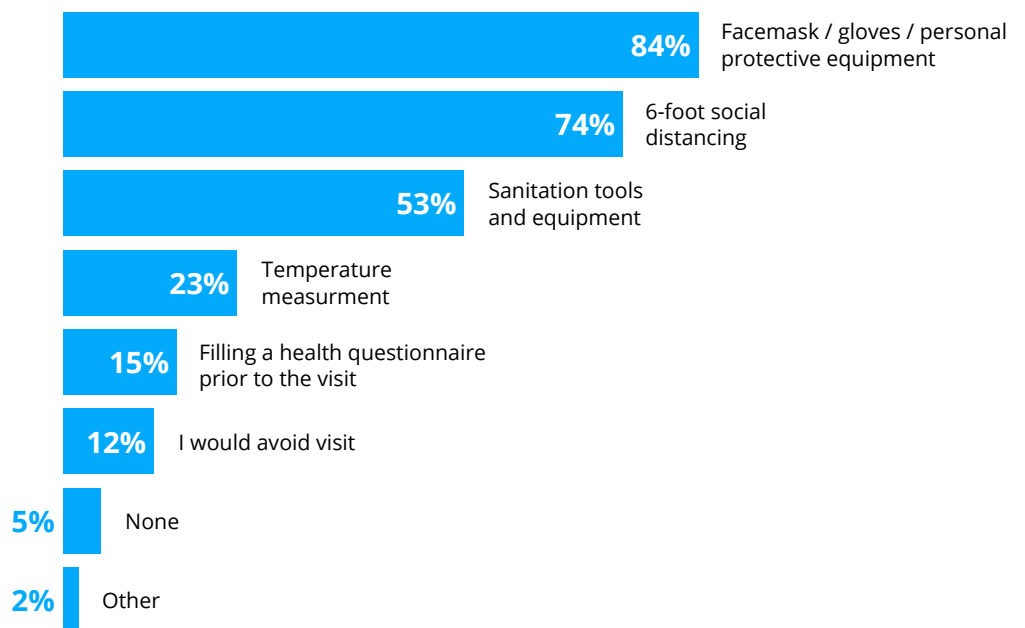


May '20



Four-fifths (79%) of consumers expect technicians to take specific safety precautions. Top of the list is wearing a facemask, gloves, and personal protection equipment (PPE) as 84% of U.S. adults specified those precautions, followed closely by six-foot social distancing, which is preferred by three-fourths (74%). Slightly more than half (53%) want the technician to be sanitizing tools and equipment. Far fewer consumers expect a technician to do either a temperature check (23%) or fill out a health questionnaire prior to entering their residence (15%), although all the numbers have risen over time.

## In case a technician is required to visit your place, what safety precautions do you expect the technician to exercise? Select all that apply.



# Brand loyalty is tied to meeting consumers' safety concerns

Safety concerns remain critical for ensuring loyalty. A majority (60%) would consider leaving a company following a technician visit that did not meet their safety expectations, similar to the percentage who said so in October (55%) and May (60%).

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

January '21



October '20



May '20



A majority of consumers would also prefer working with a company that is innovating with remote support tools. Similar to results back in May (58%), three in five (61%) agreed, while 11% disagreed that they would be more loyal if a company is innovative about new ways to offer remote support during the pandemic to eliminate technician visits.

## I would be more loyal to a company that is innovating new ways to offer remote support during the pandemic, to eliminate technician visits.

January '21



October '20



May '20



# Safety is emerging as a more critical consideration than price

This preference for extra safety is more important than price — a sentiment that has remained consistent throughout the pandemic. 64% say they would prefer companies taking extra technical support safety precautions, even if they were a little more expensive. Only 8% of consumers disagreed with this statement, while almost a quarter (31%) strongly agreed.

**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 little more expensive.**

January '21



October '20



May '20

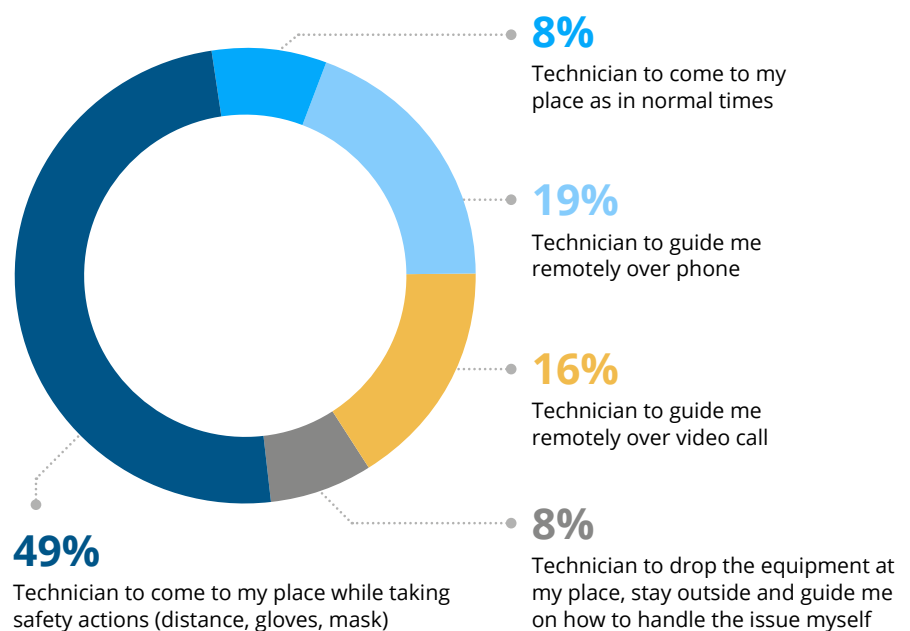


# Remote video support is emerging as a key technology to ensure safety

Remote assistance was adopted extensively by service organizations at the onset of the pandemic. It appears to be emerging as a key technology for tech support during the COVID-19 crisis, even more so among younger consumers. As mentioned earlier, one-fifth (17%) of consumers who required tech assistance during the current pandemic period were remotely guided by a technician using video. One-quarter of consumers under 45 years of age were remotely guided by a technician (27% — under 30 years of age; 27% — 30-44 years of age). In comparison, only one in six (16%) consumers between the ages of 45 and 60, and just one in 20 (5%) consumers over 60 years of age have done so.

The preference for video guidance is relatively steady across age groups. As expected, it has the highest preference among those under 30 (19%), 11% among those over 60, and a consistent 15% across the other age groups.

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



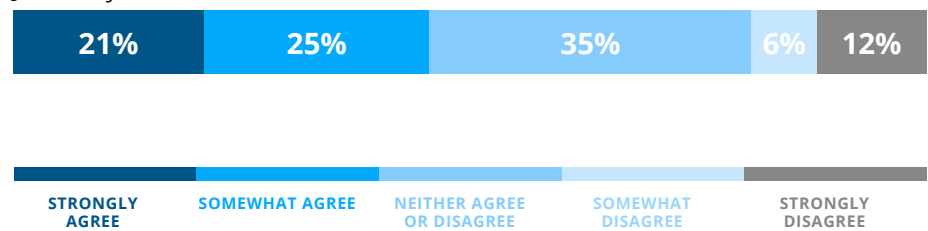
# The expected rollout of COVID-19 vaccines planned for 2021 will impact consumer expectations for service delivery

Despite the upcoming vaccine rollout, consumers still expect service delivery companies to ensure their safety. 45% of respondents say they would prefer to know that the technician was vaccinated, and 34% said they would allow the visit only if the technician was vaccinated. Almost half (49%) said they would give preference to a brand that encourages their techs to be vaccinated.

Although life is expected to go back to normal in the near future due to the vaccine, there has been a lasting shift in consumers' attitudes towards remote support. 42% of consumers indicated that — even after the pandemic — they would prefer to get remote support and avoid technician visits altogether.

## If a technician visit is necessary, I would prefer to know the technician was vaccinated.

January '21



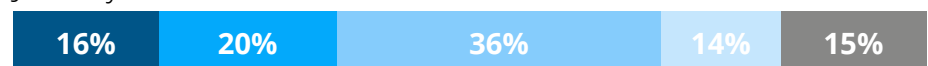
## I would allow technician visits in the future only if the technician is vaccinated.

January '21



## I would allow technician visits in the future only if members of my home households are vaccinated.

January '21



# The expected rollout of COVID-19 vaccines planned for 2021 will impact consumer expectations for service delivery

With safety the primary consideration for consumers during the COVID-19 pandemic and beyond, the precautions taken by field service organizations and their employees are now critical to customer satisfaction and brand loyalty.

Furthermore, even in the future, 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.

## I would give preference to brands who encourage their technicians to get vaccinated.

January '21



## I would prefer to get remote support and avoid technician visits even after the pandemic.

January '21



# Summary

With safety the primary consideration for consumers during the COVID-19 pandemic and beyond, the precautions taken by field service organizations and their employees are now critical to customer satisfaction and brand loyalty.

Furthermore, even in the future, 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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