The Digital Life Index

AUGUST 2020 EDITION

A Digital-First, Consumer-Centric View

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Overview

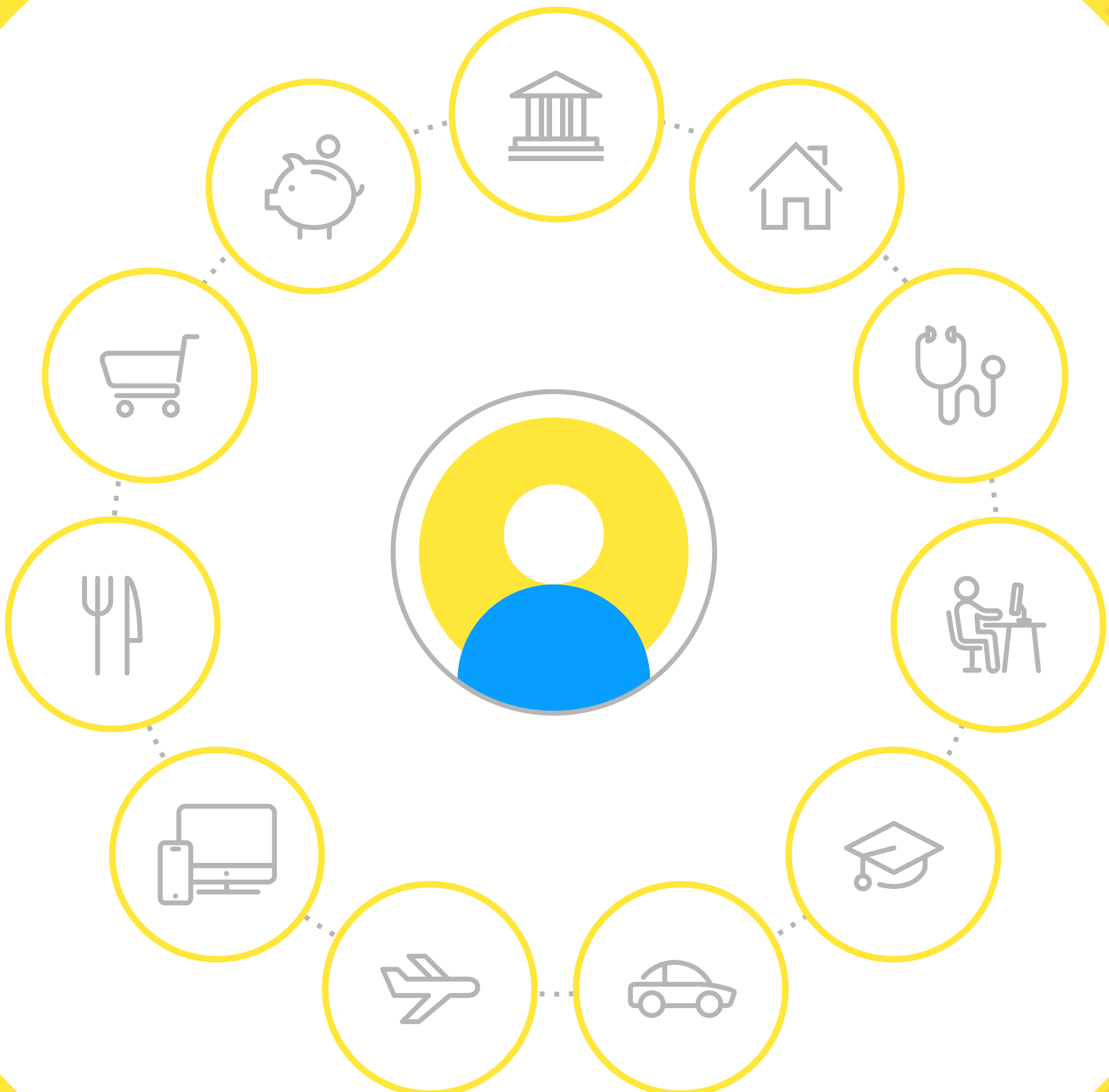
The world has been moving steadfastly toward a digital future. Now, spurred by a global pandemic, the pace of digital transformation has accelerated exponentially.

How are people adapting amid extreme uncertainty, alongside social and physical restrictions? What new trends have emerged and what behaviors will fall by the wayside? What role does technology play to track with this change – now and in the months to come? How do companies need to respond?

Our research is intended to spark an ongoing dialogue around how outside trends foster new habits, behaviors and mindsets – defining the way people interact with brands and what they expect – and will expect – from companies in the future. It's also accompanied by recommendations and actions companies can take to remain relevant, competitive and proactive – solving for an unprecedented Now, and equipping leaders for the unknowns of Next.

The Digital Life Index is an ongoing research initiative designed to help business leaders understand how to make insight-led, data-driven, people-first decisions that anchor their digital strategies – ones that will solve for an unprecedented Now and equip you for the unknowns of Next.

Consumers are people living in a digital world



In this edition

The first installment of our primary research highlights several areas hit hardest by the pandemic: Shopping, Travel, Dining and Health. In coming months, we will expand our view to include more industries, sectors and ongoing global trends.

Digital fills the social distancing gap

With more time at home, people are empowered to try new things as in-person recreational activities remain restricted. Digital channels, like social media, streaming video and voice become more than just tools, but critical outlets for discovery, connection and the ongoing pursuit of knowledge. Brands have the opportunity to become a part of the conversation by creating digital experiences that a help people explore, learn and grow.

Shopping becomes personal and on-demand

Shoppers are reprioritizing how they spend, delaying discretionary purchases and trying online grocery – many for the first time. With changes in priority comes more openness to brand switching, driven by availability and cost, as well as a willingness to try new things – redefining what it means to be brand loyal. While online shopping accelerated during the pandemic, retailers struggle to optimize digital touchpoints that replace in-person interactions. As storefronts begin to reopen, retailers and brands must consider how to create safer in-store environments that better connect online and offline experiences, with a focus on contactless technologies and fulfillment options that mirror new demand trends.

Service with a nod:
The future is contactless for travel & dining

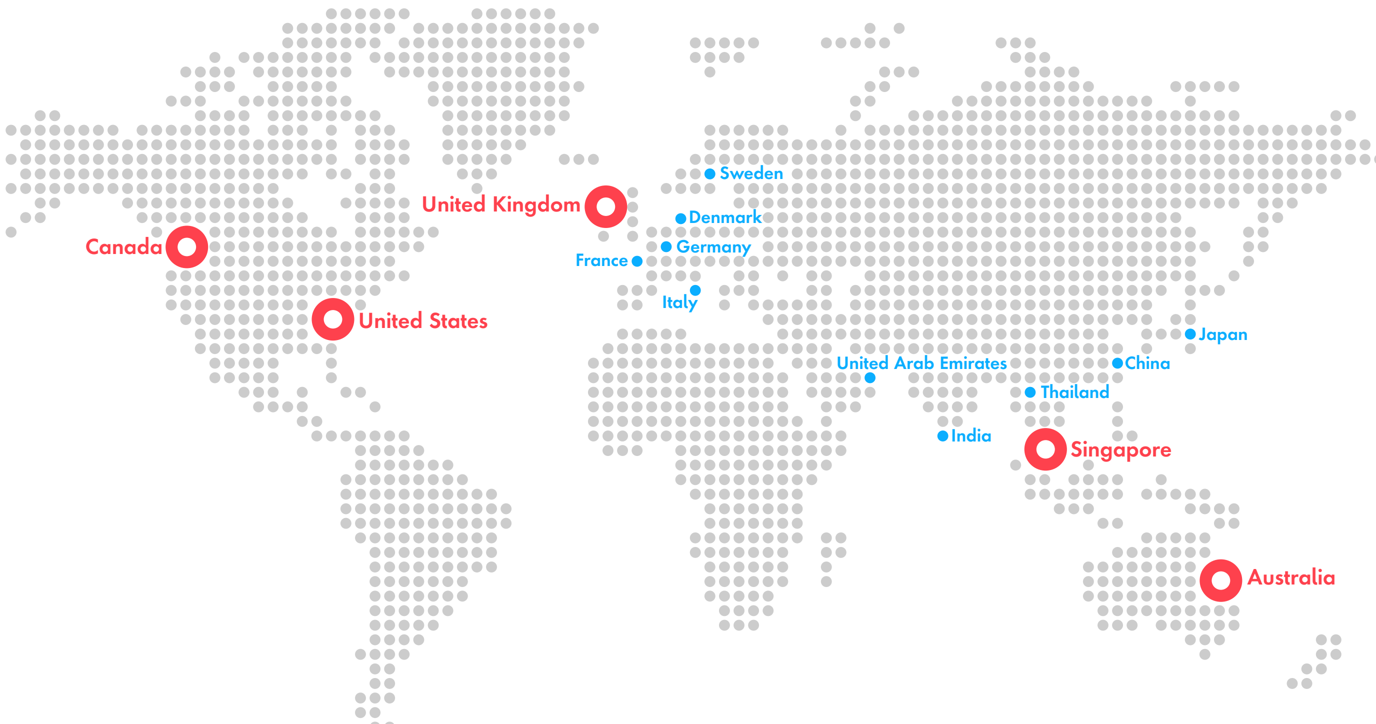
With restrictions still impacting regions globally, travel plans become more domestic as people weigh health and safety risks alongside a desire to resume leisure activity outside the home. Transparency from companies on ongoing health and safety measures affect how people travel, what hotels they stay at and where they choose to dine. Contactless technology is expected and will continue to shape the future of travel and dining – providing safer ways for guests to interact, while further integrating digital tools into new experiences.

Convenience vs. confidence:
Where patients draw the line on telehealth

Pandemic conditions make in-person healthcare seem risky to patients, with many turning to telehealth as a safer, more convenient alternative. Though patients are embracing the service and express a need for better online experiences, a majority cite concerns over sharing more intimate health details with their providers through digital channels – marking a divide in the way patients prefer to find and share information with providers online. The future of telehealth revolves around providers' ability to make experiences more accessible, so patients can get the information they need.

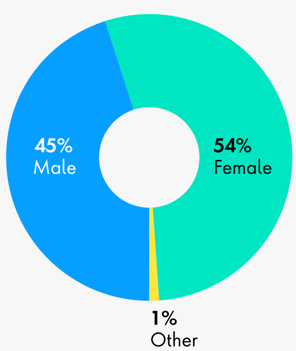
Methodology

For this initial wave, we surveyed 3,000 people in the United States, United Kingdom, Canada, Australia and Singapore. We supplemented and compared our findings with secondary research across a broader set of ten additional countries including France, Italy, Germany, Sweden, United Arab Emirates, Japan, Denmark, Thailand, China and India using syndicated and publicly available data sources.

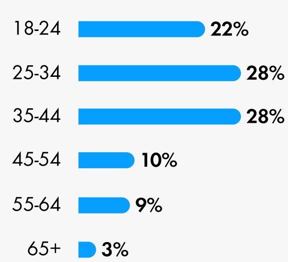


Our research focused specifically on people who where online shoppers.

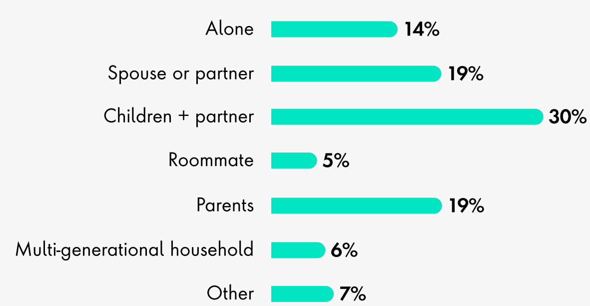
Gender



Age



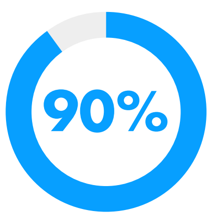
Household Composition



Digital Fills the Social Distancing Gap

Key findings

- **People became comfortable with the uncomfortable.** With more time spent at home, people are empowered to try new things – sparking a pursuit of knowledge and discovery when developing new hobbies, skills and habits.
- **Social media keeps people connected.** People rely heavily on social media, specifically YouTube, to fill the void left in the absence of coveted in-person interactions, finding ways to recreate those experiences digitally.
- **Machines get personal.** Voice assistants make personal connections and become more than just a tool as inquiries get more conversational.
- **Experiences that go above and beyond win.** To remain relevant now, companies need to offer more than just a product or service. It's about building relationships through uniquely personal and richer online experiences.



of people agreed that reopening businesses was important

Throughout the first half of 2020, quarantines and stay-at-home orders became a worldwide response to an escalating global health crisis, with countries advising citizens to limit travel and out-of-home leisure activities – like shopping, travel and dining – closing their doors.

All of a sudden, tasks like grabbing a coffee before work, dropping the kids off at school, heading to a fitness class or spending an evening with friends became highly restrictive, challenging people to adapt to a new way of life.

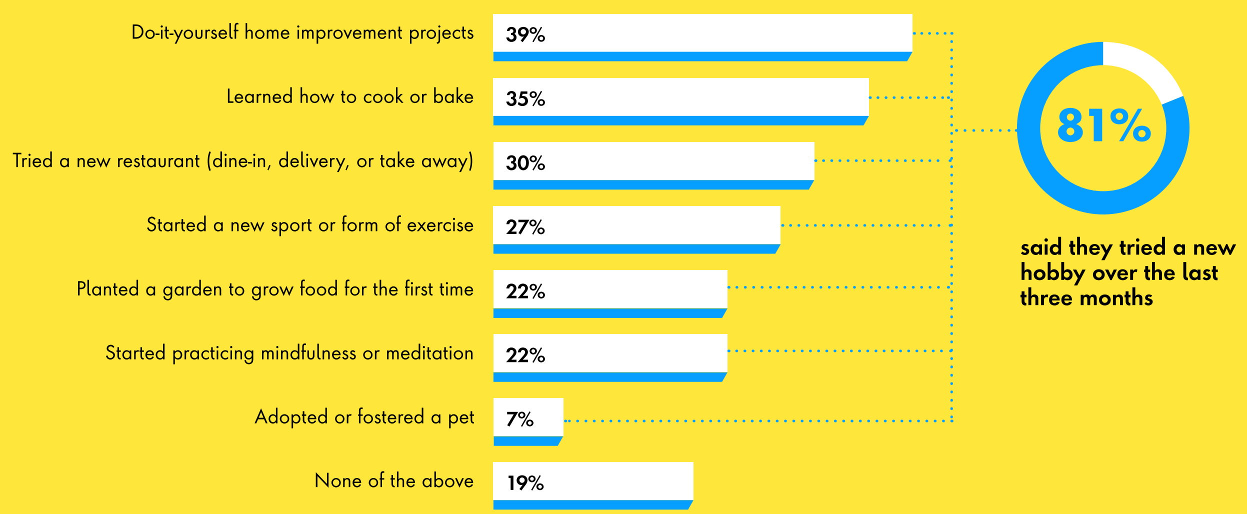
The road to returning to out-of-home leisure activity will vary by country as different regions consider easing or lifting restrictions. A GlobalWebIndex (GWI) study finds that although 90 percent of people agree that reopening businesses is important, only half of respondents say they are likely to return "very quickly." New Zealand (60 percent), Australia (66 percent) and China (55 percent) are more likely to say they will return to stores quickly. France, Canada and U.S. respondents are split, and countries like Italy and Brazil say they are more likely to delay returning to in-store activities as their regions recover.

With public restrictions likely for the foreseeable future, people face a critical question: "How do I spend my free time?" This pursuit has led to a period of exploration – with many turning to digital channels like social media and YouTube to learn about new things, try new activities and remain connected. These newfound interests offer opportunities for companies to build relationships with people who may not have interacted with their brand before and become a part of the digital conversation in a way that's relevant, authentic and valuable.

Rapid adoption of new hobbies via digital inspiration

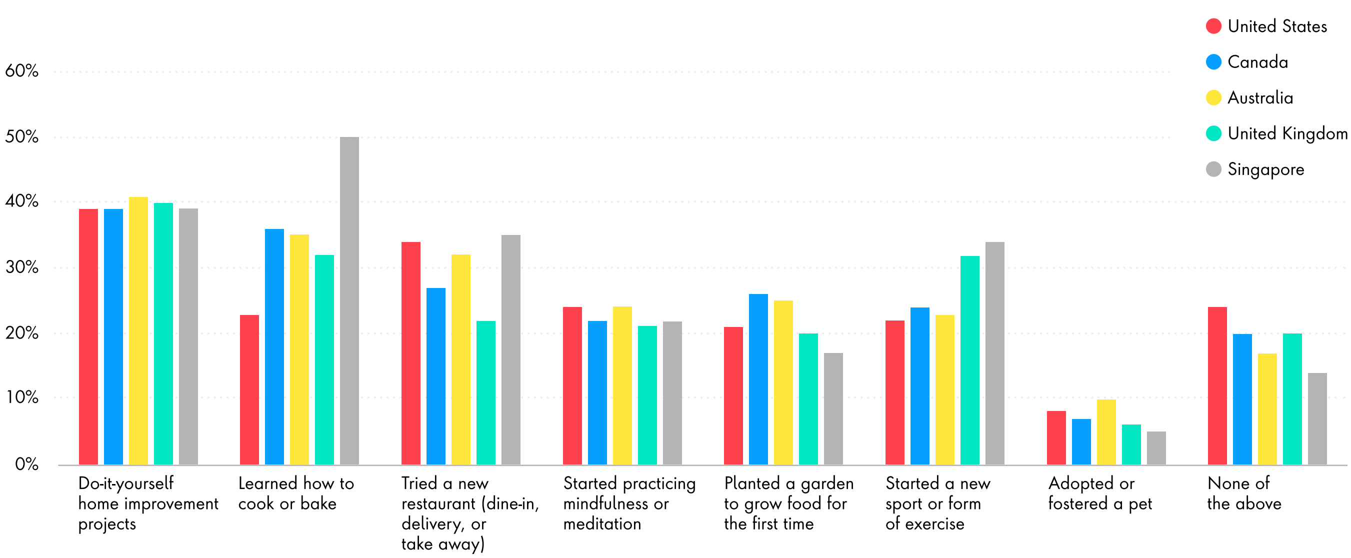
According to our research, 81 percent of global respondents say they tried a new hobby over the last three months. These hobbies strike a balance between online and offline activity, with do-it-yourself (DIY) home improvement, cooking, and trying new restaurants topping the list.

Hobbies or activities started in the past 3 months



In the past three months, have you done any of the following?

Interests vary by region and demographic. Of those who tried something new, Millennials and Gen Z were the most ambitious, outpacing older generations across all categories.



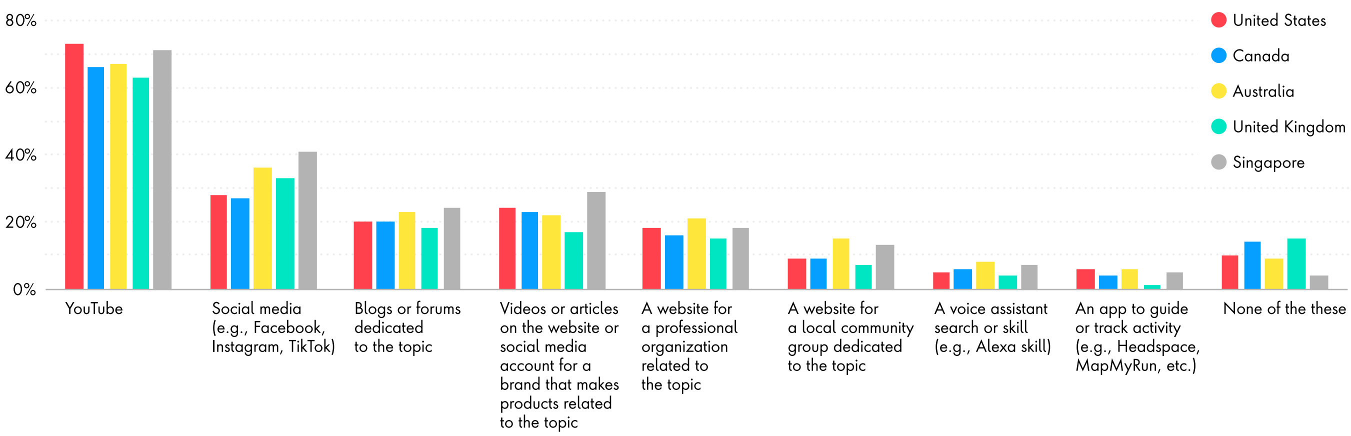
Deepening social connections through social media

People are generally social creatures, and with in-person activity limited, online tools become a powerful way to maintain social connection. When approaching new hobbies, people seek to recreate physical experiences digitally, establishing new habits powered by technology.

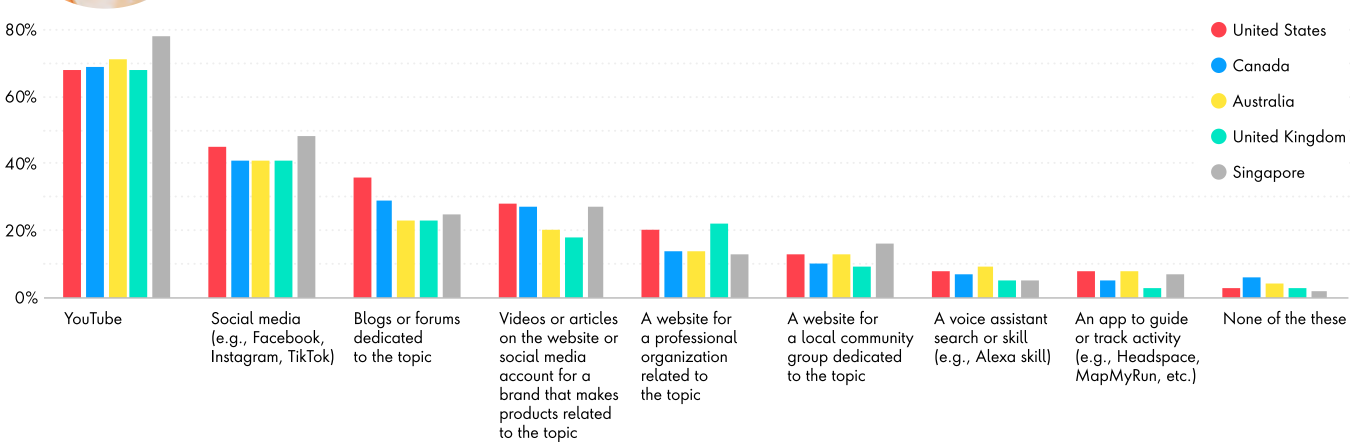
Our research finds that YouTube and social media sites like Facebook, TikTok and Instagram are the most popular channels when it comes to learning.

Activities like cooking, gardening, fitness, DIY home improvement and mindfulness/meditation skew towards video learning – mirroring experiences one would typically find in an in-person environment. In-app interactions are also more prominent among fitness and mindfulness-based activities – things that people may want to continuously track progress on or follow a routine with.

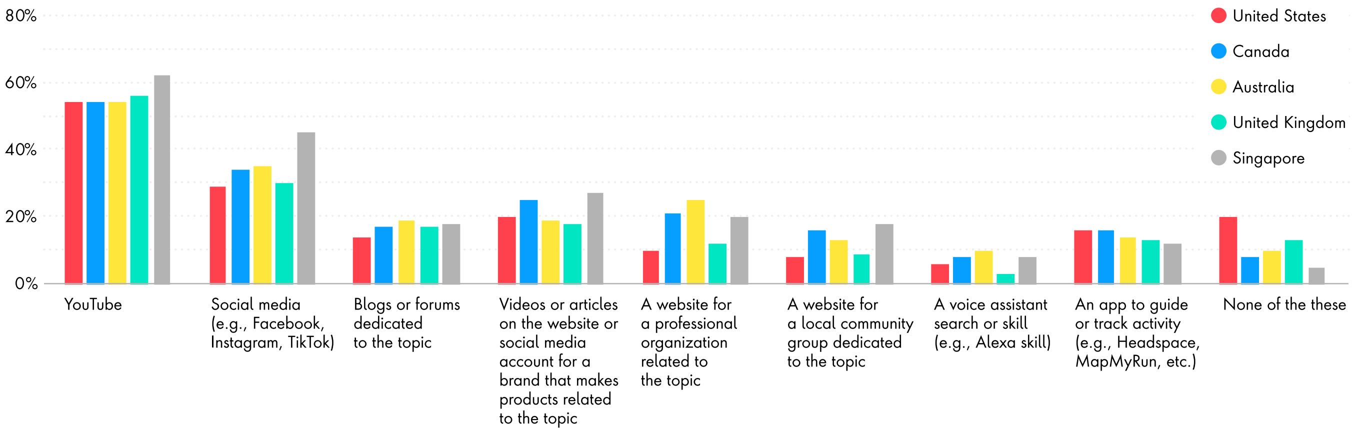
Do-it-yourself home improvement projects



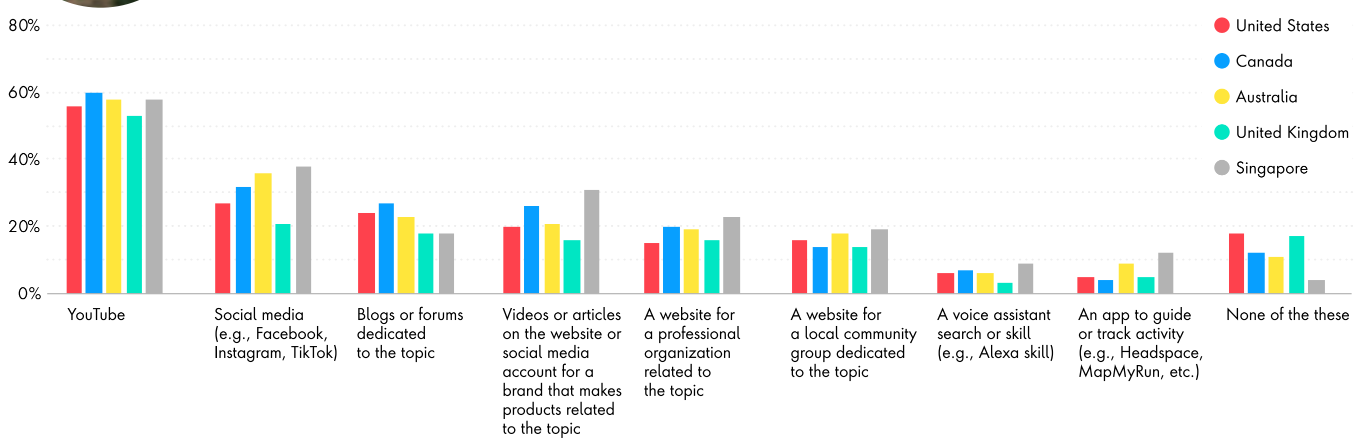
Learned how to cook or bake



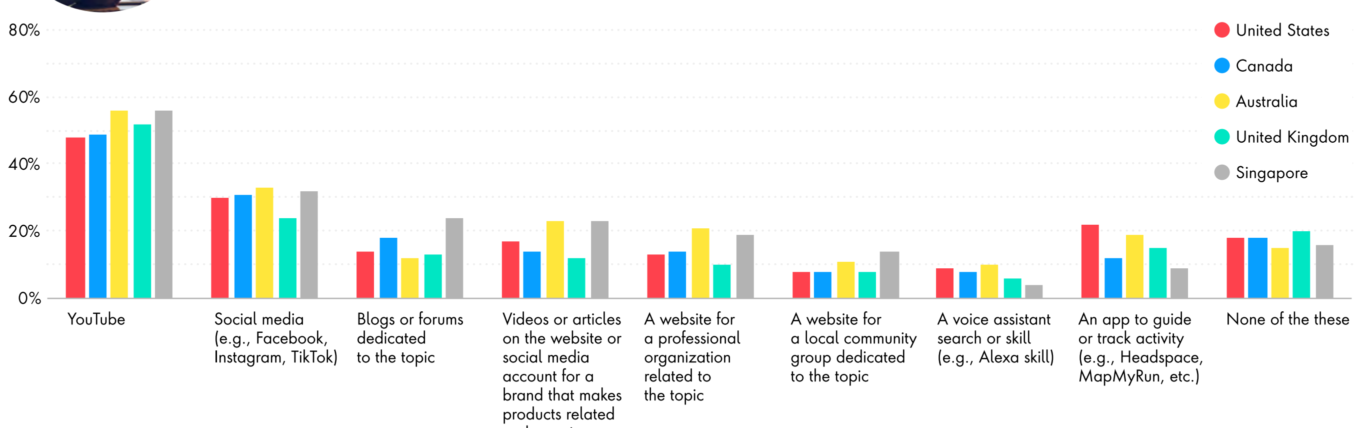
Started a new sport or form of exercise



Planted a garden to grow food for the first time

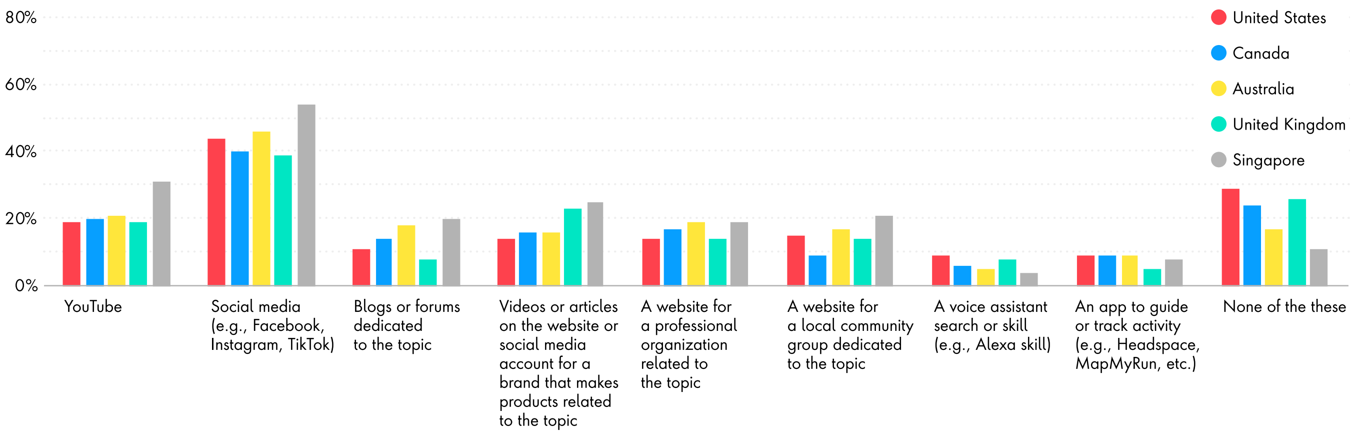


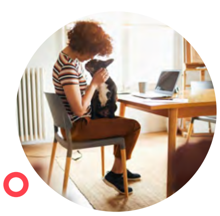
Started practicing mindfulness or meditation



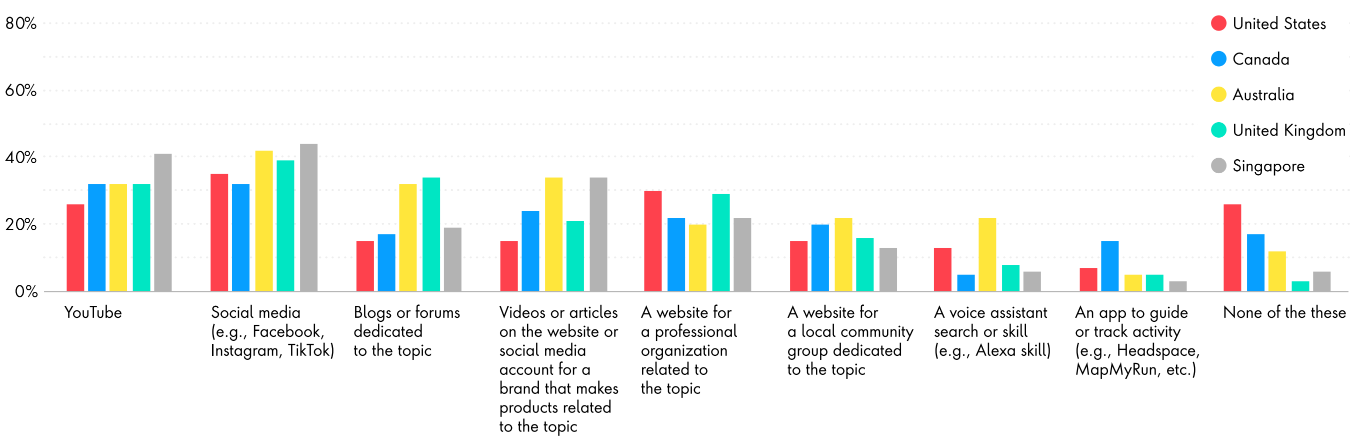
For activities like researching new restaurants and adopting pets, social media channels that provide knowledge sharing through crowdsourcing and word-of-mouth are preferred.

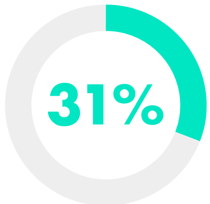
Tried a new restaurant





Adopted or fostered a pet





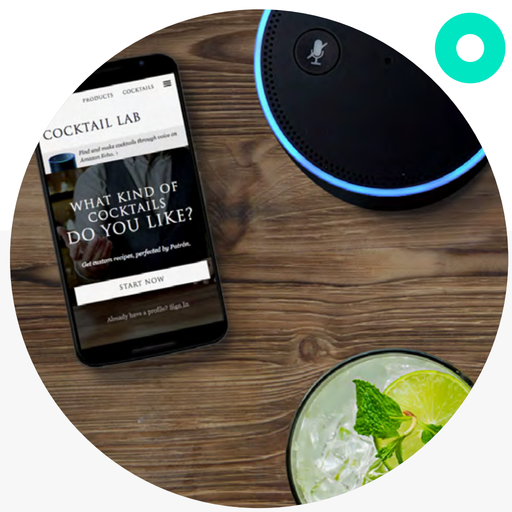
of people are more likely to make a purchase from brands that provide education via product videos or how-to content

Branded content also plays a rising role. Aside from cooking, people cite branded content as one of their top three resources for learning across categories. Our research finds that people are 31 percent more likely to make a purchase from brands that provide education via product videos or how-to content. In this way, people are turning to brands not just for purchasing but as a trusted resource for personal growth.

A voice (assistant) in the void

Though voice remains an emerging channel, our research finds that people are beginning to view voice technology as more than just an assistant. Data from 2019 shows that before the pandemic, people typically used voice for tasks like playing music or checking the weather.

However, over the last few months, our research finds people are more likely to use voice assistants as a guide. For example, Allrecipes Alexa says there has been a 67 percent uptick in traffic and an 45 percent increase in new users during the pandemic – signaling that people looking to try new recipes are turning to voice to help teach them along the way.



Patron's Cocktail Lab delivers personalized cocktail recommendations for people looking to experiment at home. Integrations with Amazon Echo, Echo Show, or Google Home let people "Ask Patron" to find a cocktail recommendation for any occasion.

Read case study

Capturing share of digital life

As we move toward recovery, brands should look to understand the role they play in this evolving digital ecosystem, not just as a provider of goods and services, but also as a resource for discovery, knowledge and exploration in a world that's becoming more comfortable with leveraging digital tools and more open to breaking from the routine.

The digital life of brands

Educate through branded content

Assist people in their pursuit of knowledge by providing educational content that encourages upskilling or helps people think about new ways to use products or services creatively.

Connect through social commerce

With social media serving as a channel for people to exchange ideas and recommendations, make the path from discovery to purchase easier and more convenient through social commerce tools that allow shoppers or diners to place an order directly from a social platform.

Invest in voice

The role of voice is changing, especially as people become more accustomed to the technology. Brands should consider how voice plays a role as part of an omnichannel customer journey now to remain ahead of the curve.

Tap into unstructured data

Monitor social media to uncover real-time conversations, gauge sentiment, respond to shifts in demand, and meet shopper needs at the right moment.

Shopping Becomes Personal and On-Demand

Key findings

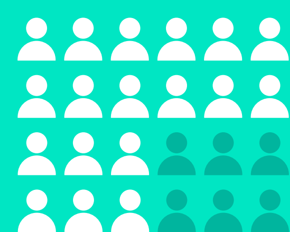
- **Consumers reprioritize spending.** The pandemic and economic uncertainty are influencing shopper decisions, with many delaying discretionary purchases and exploring online grocery opportunities.
- **Brand switching redefines brand loyalty.** Shoppers are more willing to try new things, leading to periods of discovery and what it means to be brand loyal.
- **Online shopping needs a personal touch.** Though online shopping is on the rise, shoppers remain frustrated when trying to recreate physical touchpoints digitally.
- **In-store, contactless offers safer experiences.** With social distancing a primary concern, shoppers want more contactless interactions at physical locations, especially when it comes to payment.
- **Buy-online-pickup-in-store (BOPIS) and curbside bridge the physical and digital divide.** Preference for curbside and BOPIS present opportunity for brands to better connect physical and digital shopping experiences.

Digital retail experiences are far from new for shoppers. E-commerce, mobile and social have played a steady role in the shopping experience – both online and offline – for years. But when a global pandemic disrupted the status quo, the relationship shoppers had with digital changed.

Online shopping became an essential resource during times of uncertainty. Now, as physical locations resume operation, shoppers will continue to expect digital services to play a role, with experiences designed for convenience, connection and safety. For brands, this “new normal” holds opportunity to deepen relationships with shoppers by understanding their wants and creating omnichannel experiences that cater to their needs.

According to our research, nearly three-fourths of shoppers say they have purchased online more than they usually do over the last three months, with 48 percent saying they believe they would continue to shop online in the future. However, priorities have changed amid economic uncertainty.

Although people say they typically prefer to shop online for apparel, household supplies and electronics, nearly 77 percent of shoppers worldwide plan to delay these discretionary purchases until pandemic conditions improve.



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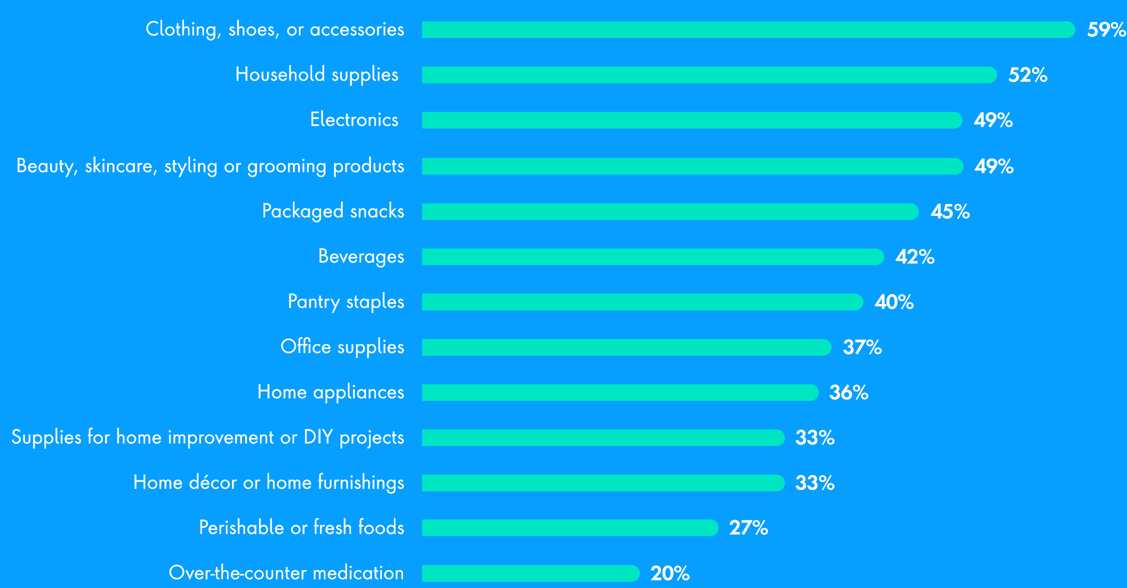
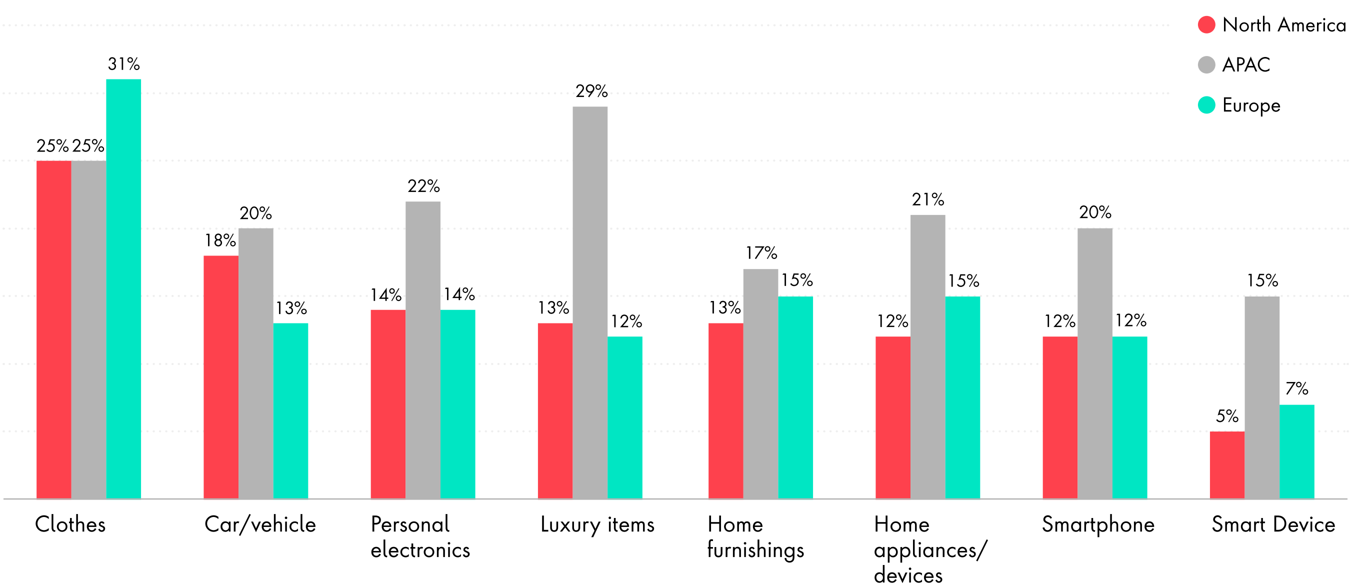
Products shoppers prefer to buy online



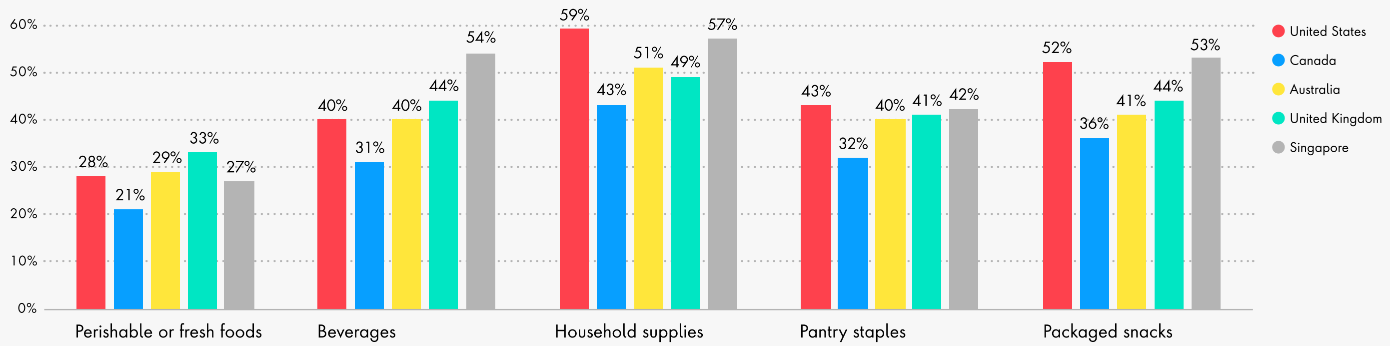
Priorities in delaying discretionary spending varies by region



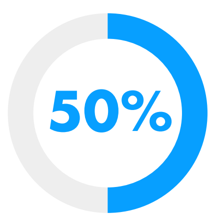
Sampling online grocery

Though less than half of shoppers say they typically prefer to shop for grocery items like perishable foods, beverages, packaged goods and pantry staples online, there was a 57 percent increase in those who tried online grocery service for the first time during the pandemic, signaling a shift in demand as shoppers reprioritize spending.

Products shoppers prefer to buy online



Our research finds that 50 percent of shoppers who try online grocery say they would be willing to use the service more in the future. However, concerns over buying fresh produce online, high delivery costs and limited availably of product and delivery slots are among the most common sources of dissatisfaction with the service, leaving room for improvement for grocers when managing orders and fulfillment through digital channels.



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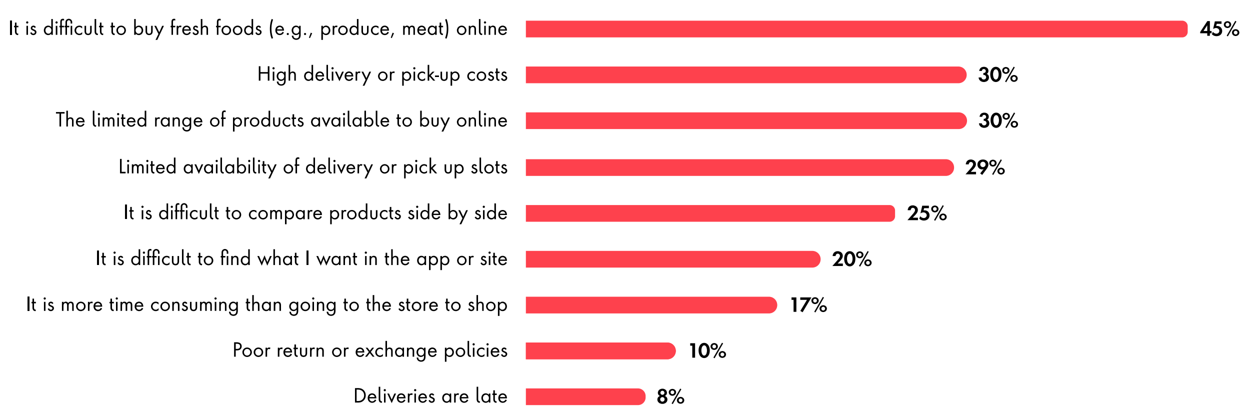
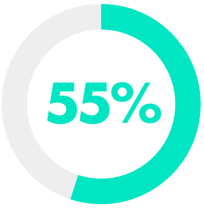
Reasons to use online grocery less in the future



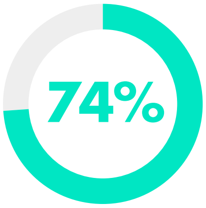
As shoppers become bolder, brand loyalty takes on new meaning

Along with shifts in spending priority, our research finds that fifty-five percent of shoppers purchased from a new-to-them retailer and 74 percent purchased a product from a brand that they hadn't bought from previously.

Motivation for brand switching largely depends on category. For discretionary items like apparel and home accessories, cost and a willingness to try new things are primary drivers – mirroring hesitancies around discretionary spending and forays into new offline activities. For pantry staples and household goods, availability is a driving factor – mirroring demand trends related to pandemic stock-ups.

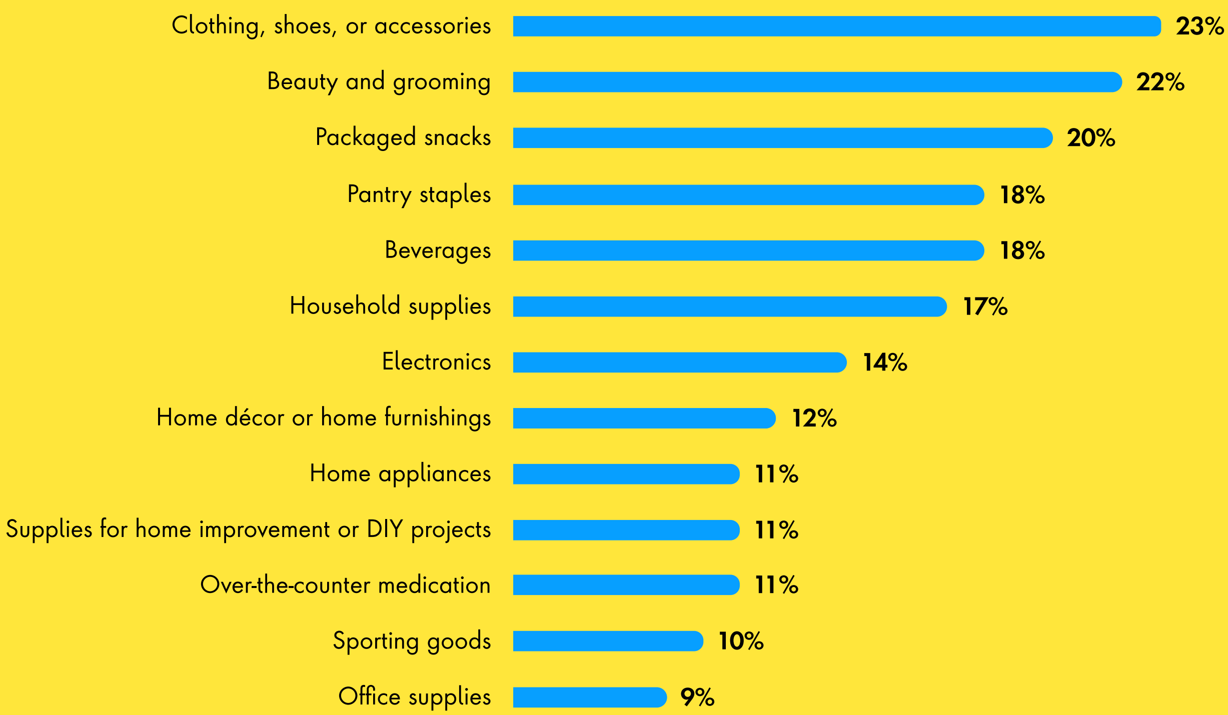


of shoppers purchased from a new-to-them retailer



of shopers purchased a product from a brand that they hadn't purchased from previously

In the past 3 months, in which of the following categories have you purchased products from brands that you had not purchase from before?

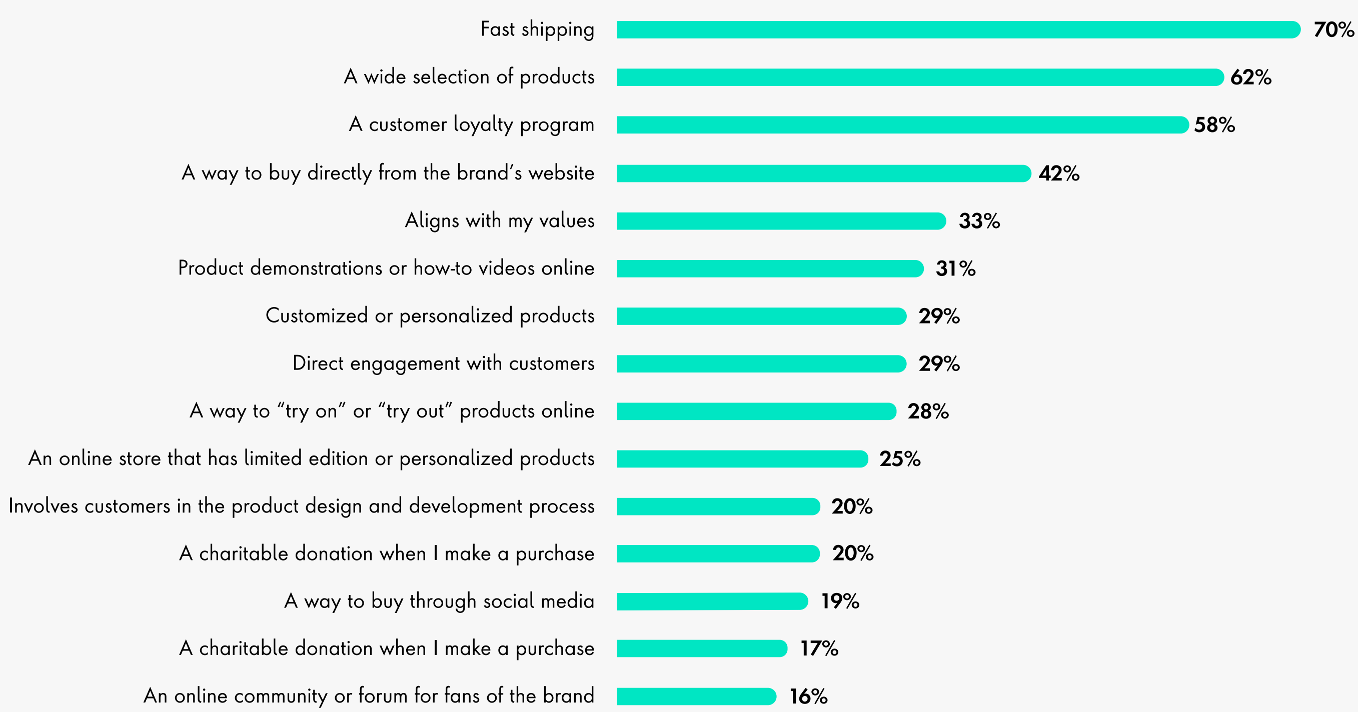


Despite increased brand switching, shoppers still value loyalty programs. According to our research, loyalty programs are among the top three factors influencing choice of brand, followed by the ability to buy direct.

Direct online purchasing resonates differently across different categories. Shoppers across all regions and ages express the most interest buying directly from clothing, shoes and accessory brands (42 percent), electronics (41 percent), beauty and skincare companies (34 percent) and home appliances (30 percent), signaling a greater propensity for brand recognition and loyalty among these product groups when compared to other categories.

With openness to trying new things, the idea of brand loyalty moves beyond just preference. Shoppers don't just want to be offered new products or services, they want to feel understood by the brands they value and interact with regularly.

I am more likely to buy from a brand that (offers):



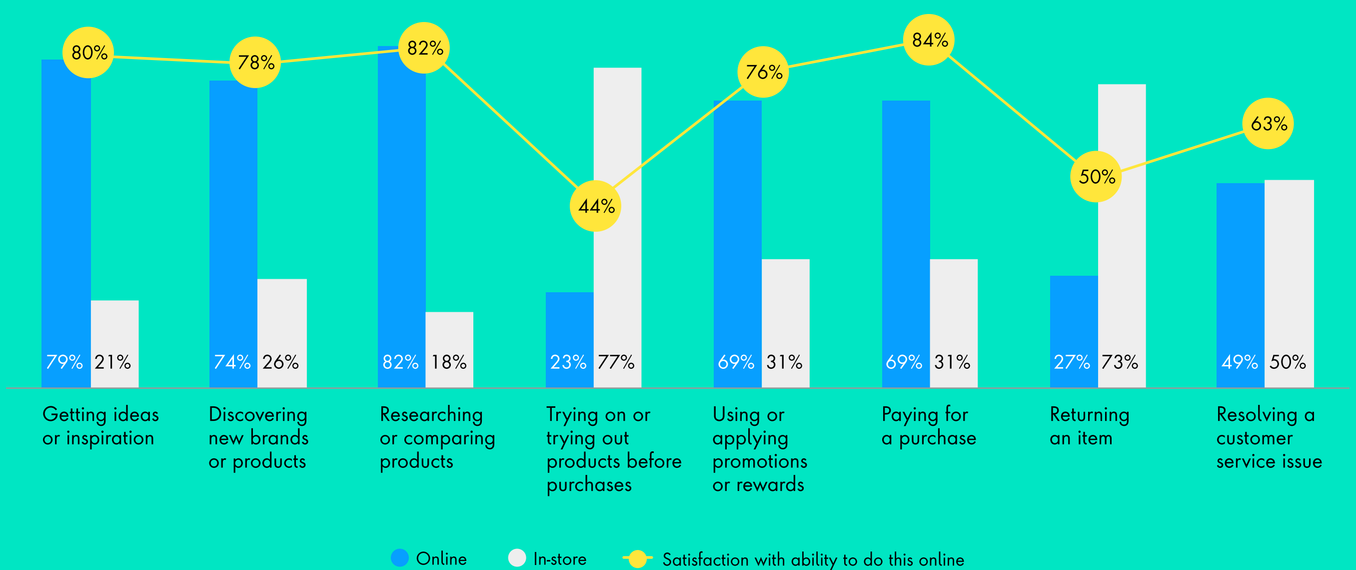
Retailers struggle to add the personal touch online

Online shopping continues to grow, but the journey is far from complete when it comes to satisfaction – especially when recreating physical touchpoints digitally. Shoppers note frustration with the ability to try out products, communicate with customer service and process returns online, opting for in-store experiences instead.

Since these actions are inherently physical, retailers must consider how to better connect online and offline actions when social distancing measures remain top-of-mind. Technologies like chatbots, in-platform social messaging and video conferencing can spark more efficient real-time customer service interactions, with the ability to automate routine processes while offering opportunities for personalized communications when handling complex inquiries.

Retailers are also turning to augmented reality to bring a physical touch to digital spaces. For example, Sephora allows shoppers to virtually "try-on" beauty products by uploading a photo of themselves to their website or mobile app. In the household goods space, retailers like IKEA give shoppers an opportunity to build virtual "rooms," with shoppers mixing and matching products to envision an ideal space and video chat with a customer representative to ask questions before committing to a purchase. This convergence of physical and digital can be used online and in-store, giving shoppers options to engage digitally at physical locations, or from the comfort of their homes.

Online/In-store preference of journey stages and satisfaction with online ability to accomplish these types of tasks



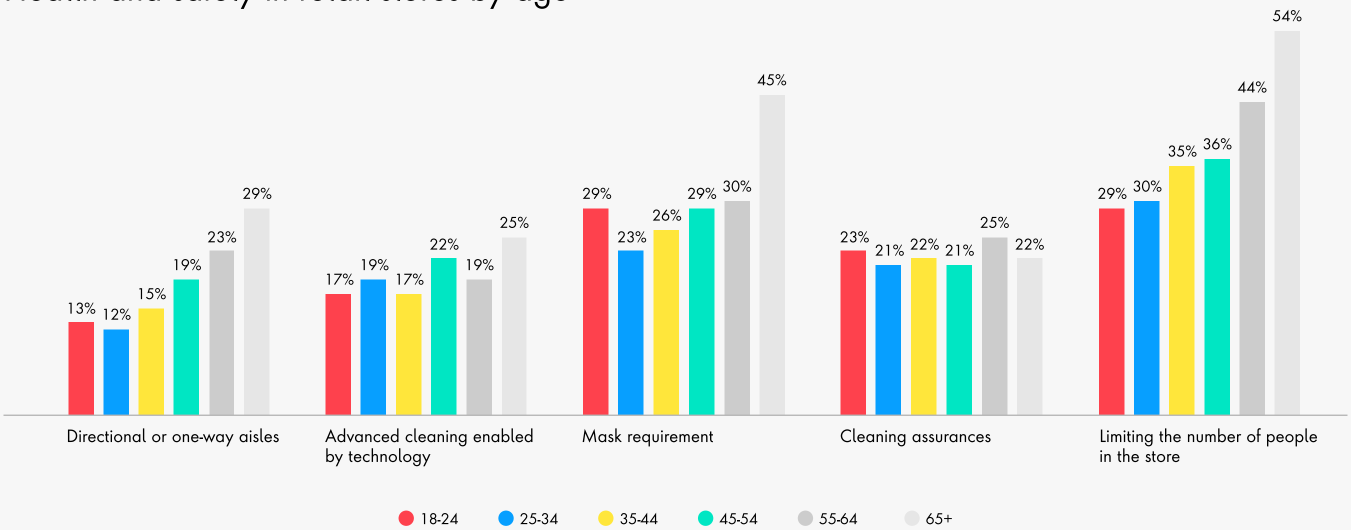
But in-store, shoppers keep their distance

At physical locations, shoppers are looking for an experience that provides safe, socially distant interactions enabled by contactless services. According to our research, three-fourths of shoppers cite health and safety as a top factor influencing choice of retailer.

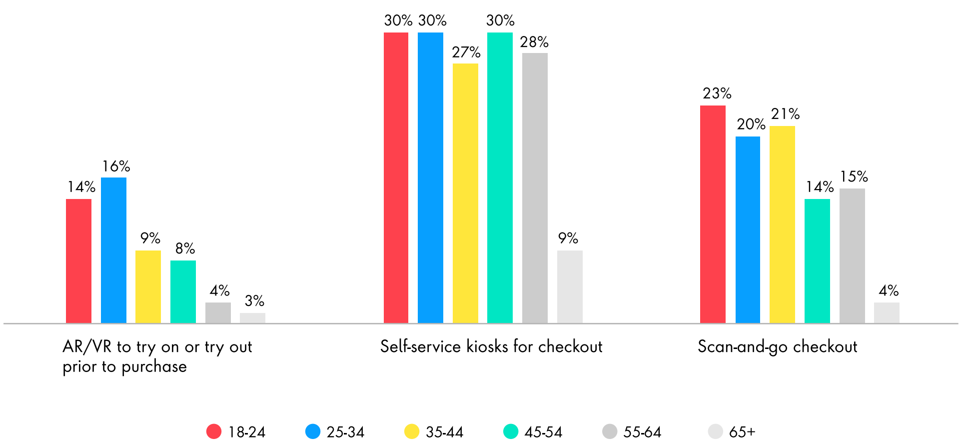
Of the safety measures noted, limiting the number of people in-store was the most preferred precaution across all generations.

Of contactless options, shoppers across generations say self-service checkout and mobile scan-and-go technologies make them feel safer while in-store.

Health and safety in retail stores by age

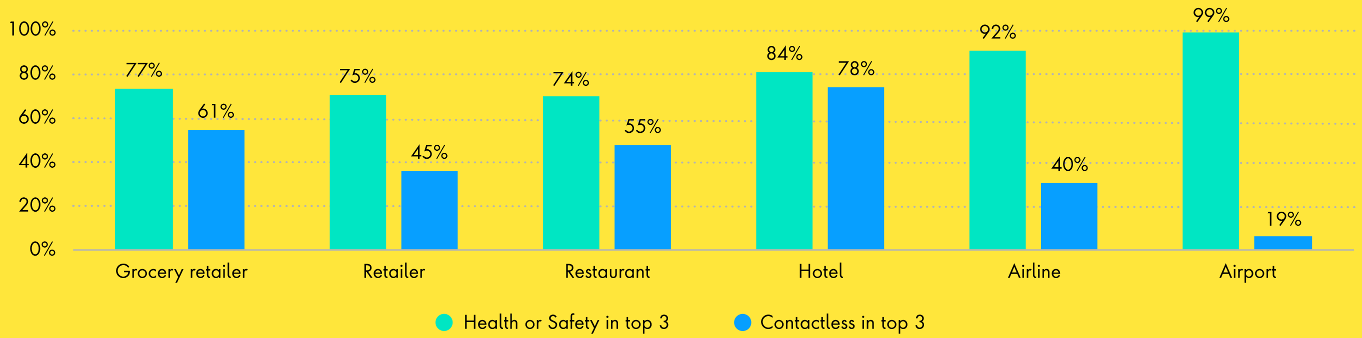


Contactless technologies by age

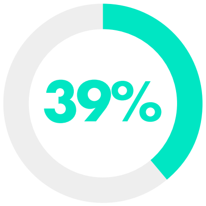


When compared with other retail, shoppers cite a greater need for health precautions and contactless services at grocers. This divergence could play into higher foot traffic at grocery stores, a preference for in-person shopping at these locations, and grocery's ongoing role as an essential retailer.

Percentage of participants that selected health measures or contactless options in their top 3 criteria for patronage

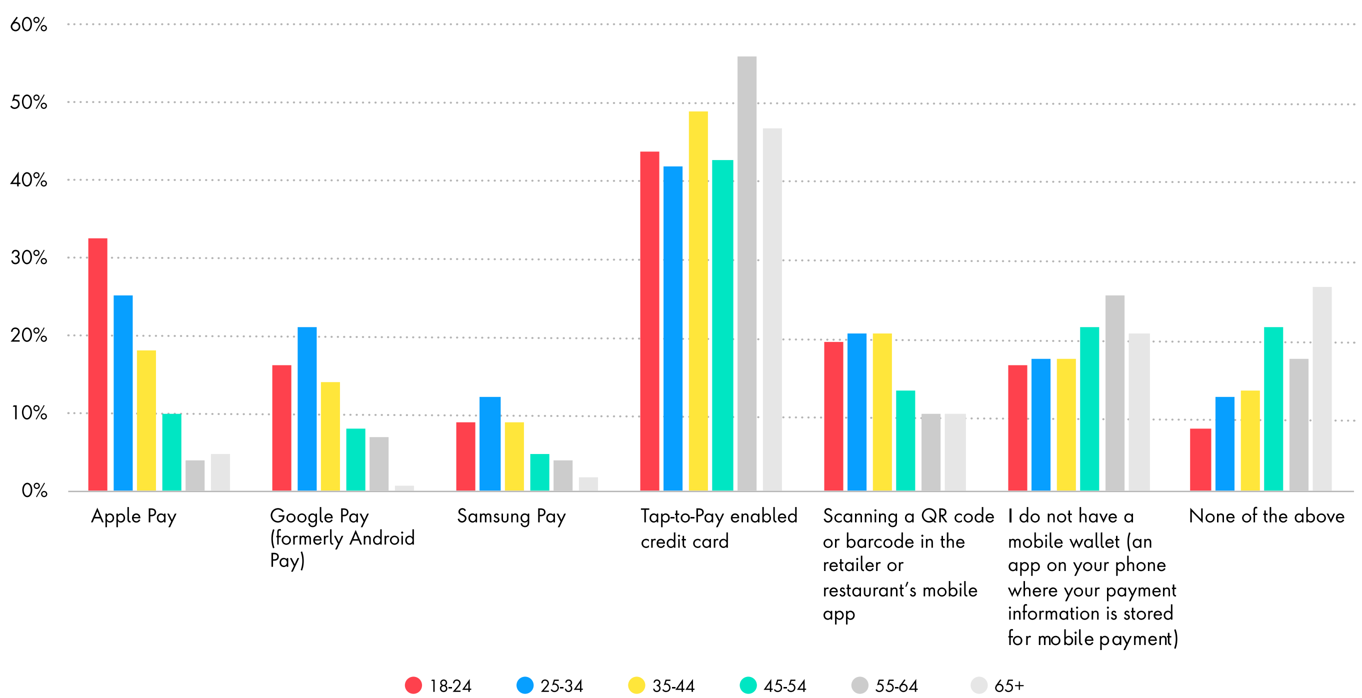


People are also dipping into their digital wallets in preference for contactless payments. Sixty-seven percent of shoppers say they've used some sort of contactless payment at a physical location, with 39 percent saying they would use contactless payment almost every time if offered. Tap-to-pay enabled credit cards are the top method of contactless payment across all age groups, with mobile payments, like Apple and Google Pay preferred among Millennials and Gen Z.



of shoppers said that they would use contactless payment almost every time if offered

Which of the following have you used to pay for a purchase in a physical store?



BOPIS, curbside pickup provide a balance

Buy-online-pickup-in-store (BOPIS) and curbside pickup are both fulfillment methods that connect the dots between online and offline interactions – giving shoppers the ability to continue to research, discover and purchase products online, with the convenience of immediate fulfillment and the ability to interact with store employees in a limited setting.

According to our research, BOPIS/curbside pickup are the most preferred methods of pickup/delivery, but there are notable preferences by region and age.

For example, Gen Z and Millennial shoppers are more likely to opt for newer methods of online shopping and delivery, like hyper-local, secure product lockers and online marketplaces. Older generations are more likely to favor more traditional 3-5 day ground shipping and they say they're less likely to rely on services like subscription delivery and online marketplaces for future ordering.

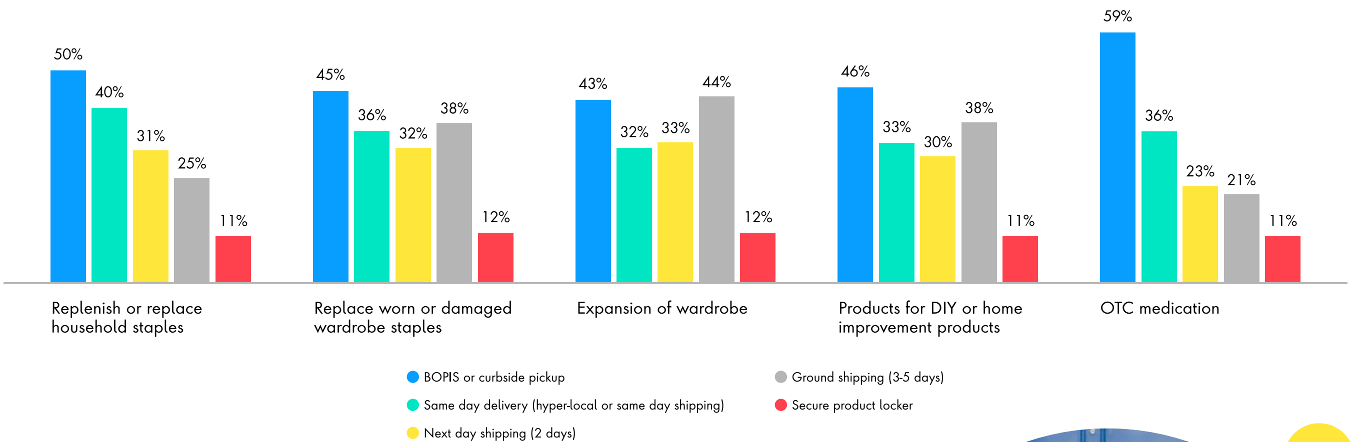
Although shoppers usually prefer using only one method of online delivery, people who use BOPIS and curbside are more open to using other digital fulfillment methods, signaling that shoppers who are more accustomed to using digital fulfillment may be more willing to try new services in the future.

At a glance

Shipping preferences differ by country

- U.S. shoppers are more likely to choose curbside pickup or ground shipping across all categories
- Shoppers in Australia are more likely to choose BOPIS across all categories
- Shoppers in Singapore are more likely to choose hyper-local or same-day shipping across all categories
- Shoppers in the U.S. and UK are more likely to choose next-day shipping across all categories

Fulfillment by category or motivation



As physical retail adapts to pandemic conditions, brands are accelerating efforts to adapt their storefronts and existing contactless offerings. Walmart Canada, for example, allows shoppers to build shopping lists, schedule pickup and delivery and quickly checkout using their mobile device. Grab-and-go lockers are also available at select locations, providing shoppers with a convenient, touch-free way to pick up online orders in-store.

Read case study

The digital life of shoppers

Shoppers have embraced digital channels throughout the pandemic, developing new habits and preferences. To improve experiences, retailers and brands must identify pain points in the shopper journey and build omnichannel solutions that create frictionless experiences both in-store and online.

In-store, focus on safety

As physical locations adapt to ongoing social distancing restrictions, grocers and retailers must put health and safety first, leaning into contactless technology to reduce friction while providing environments where shoppers feel safe.

Create seamless end-to-end shopping experiences

While online shopping is on the rise, brands still have room for improvement when connecting online and offline interactions. Brands must consider how all channels play a role in the shopper journey and how technologies like chatbots, mobile apps, social commerce and AR play a role – no matter where a shopper chooses to make a purchase.

Understand shoppers

In today's "new normal," loyalty goes beyond offers and promotion. Brands must use data to understand preferences across every part of the shopper journey and create personalized experiences that meet their needs. Offering paths to purchase through direct-to-consumer services can help brands build those intimate, one-to-one relationships shoppers are looking for.

Provide flexible fulfillment options

With more people shopping online, expanded delivery and pickup options through scheduled delivery slots, BOPIS and curbside pickup give shoppers more options while reducing last-mile costs

Service with a Nod: The Future Is Contactless for Travel & Dining

Key findings

- **Travel goes domestic.** Months spent at home have people looking forward to taking trips, but planning has been closer to home.
- **Health and safety will make or break travel decisions.** Travel and dining decisions are influenced by feelings of safety, with expectation for hotels, restaurants and airlines to put health first.
- **Travelers and diners expect services that are contactless.** Transactions that eliminate contact help travelers and diners feel safer.
- **Personalization makes travel more connected.** Restaurants and travel companies have the opportunity to create more connected, personalized digital experiences as people begin to plan trips again.

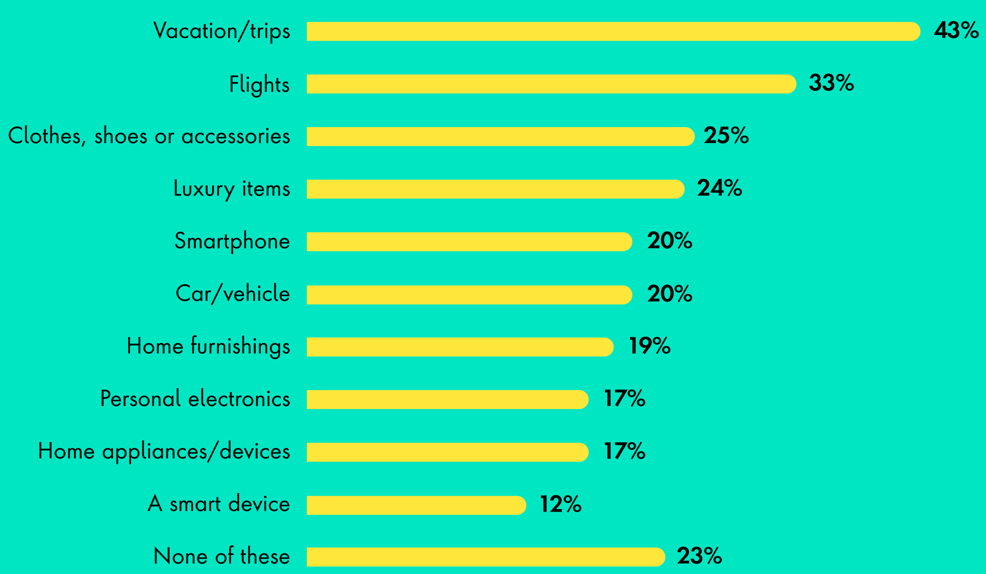
Travel and dining are so much more than just experiences. For many, it's a way of life – outlets for people to break away from the hustle and bustle of everyday life – to relax, reset, expand horizons and create new memories.

For people stuck at home, anticipation to return to travel and dining has been mounting. Yet people are forced to curb their enthusiasm and rethink plans amid restrictions and health risks. As travel and dining face a longer road to recovery, contactless technology can help make people feel safe while continuing to build on the convenience of digital experiences people already expect from hotels, airlines and restaurants.

With no assurance of health and safety, travelers rethink vacation plans

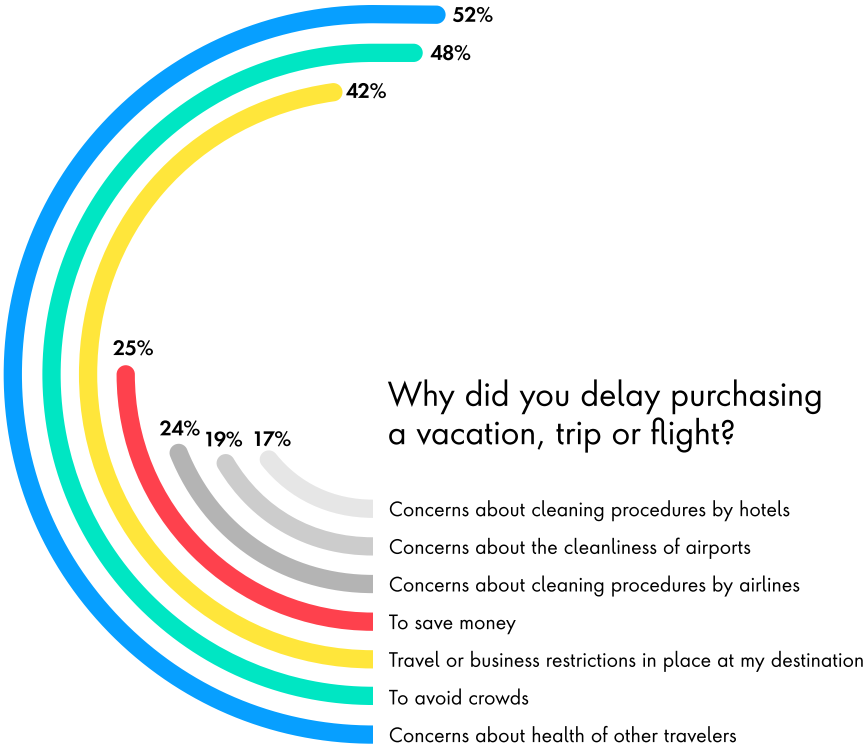
Travel plans came to a halt at the onset of the pandemic as health concerns and regional restrictions prompted travelers to delay vacation plans and stay at home.

In the past 3 months, have you delayed any of the following?

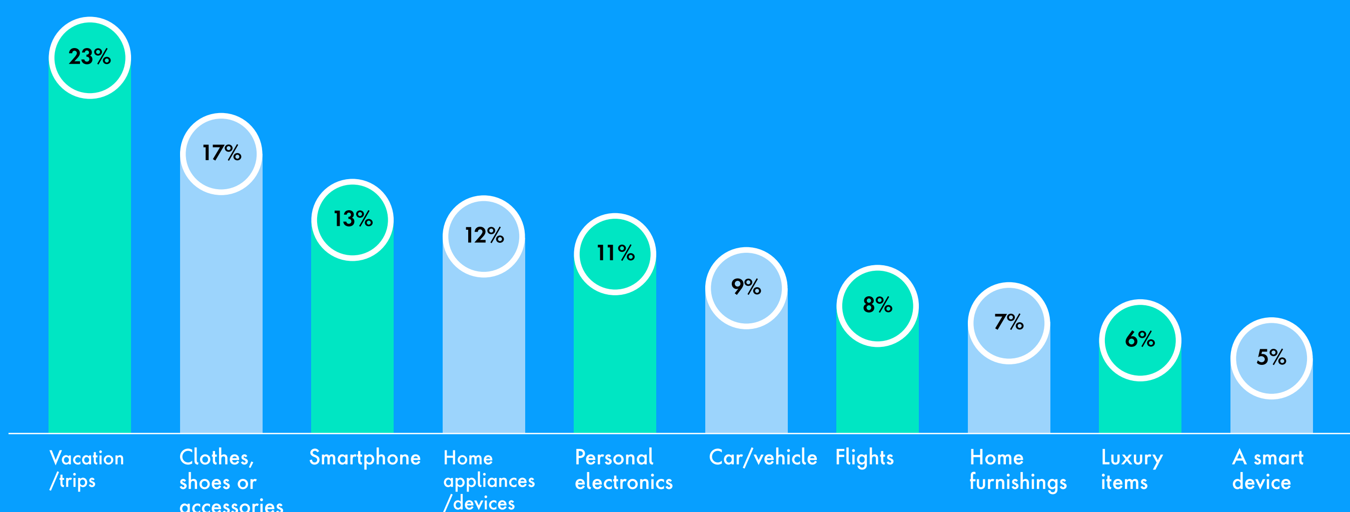


However, according to our research, people want to return to the normalcy that out-of-home leisure provides – but only when the time is right. Though travel is a significant priority for future discretionary spending, the types of trips people are willing to take in the near future are closer to home. Only eight percent say they'd prioritize flights, with many opting to delay travel and other purchases entirely until the pandemic subsides in their region.

Why did you delay purchasing a vacation, trip or flight?



Which purchases will you prioritize first?

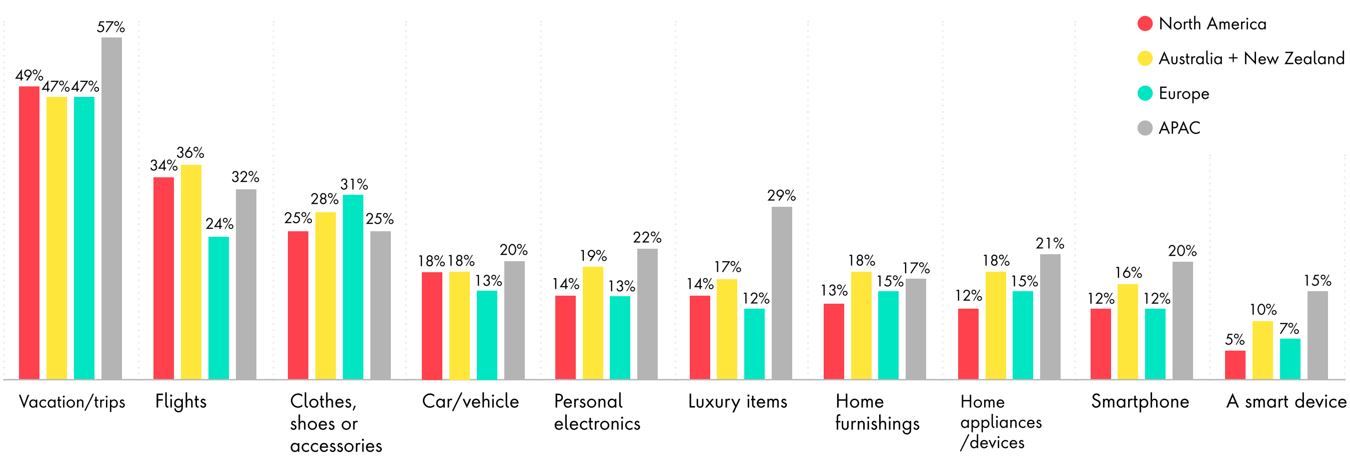


Travelers' propensity for domestic ventures depend on regional readiness and level of pandemic recovery, which remains uncertain across the globe.

According to GlobalWebIndex (GWI) research, New Zealand and China have the largest proportion of travelers who say they plan to travel domestically after the pandemic subsides (44 percent each). In the United States and United Kingdom, government guidance and ease of lockdown restrictions continue to play a larger role when making travel decisions, especially for those facing economic hardship (41 percent).

In Sweden, close to half of travelers did not change their vacation plans, but they say they would decrease spending on leisure activities like visiting amusement parks, zoos and museums. More than 60 percent say they would consider staying in a hotel over the next six months.

Which of the following have you delayed purchasing?



Transparency or No-Go

Hotels and airlines are places that invite large crowds – something travelers are hesitant about, especially at a time when social-distancing measures are largely enforced. Hotels, airports and airlines have an obligation to ensure travelers understand what precautions they are taking to ensure passenger and visitor safety. These efforts play a major role across the entire decision-making process, including what airline people prefer to fly and the hotels they trust to book with.

Travelers say they would feel safer flying with airlines that limit the number of passengers on a flight, ensure the health and safety of employees and use advanced cleaning technologies. Testing while onboarding, guaranteed entry into ports and staff use of masks on flights is more important for Gen Z travelers than other generations. At hotels, employee safety and cleanliness are top concerns.

At a glance

Travel and safety

99% of travelers list health and safety procedures as one of the top three factors influencing their choice of airport

92% of travelers list health and safety procedures as one of the top three factors influencing their choice of airline

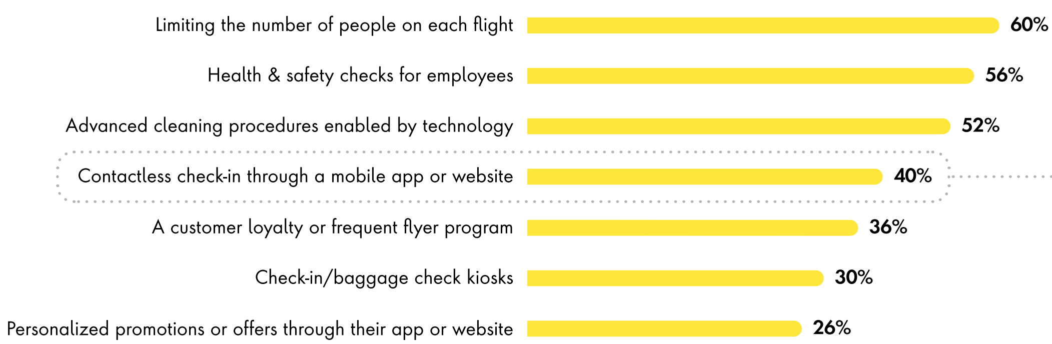
84% of travelers list health and safety procedures as one of the top three factors influencing choice of hotel

People are more likely to fly through an **airport** that offers health and safety assurances and procedures

99% of participants selected a health or safety measure as one of their top 3 factors influencing their choice of airport.

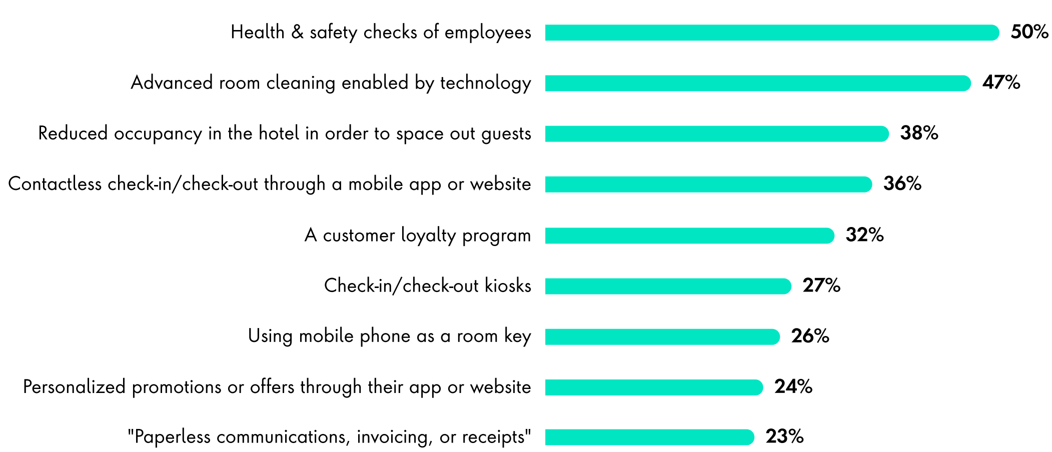
19% of participants selected a contactless interaction as one of their top 3 factors influencing their choice of airport.

People are more likely to fly with an **airline** that offers health and safety assurances and procedures



40% of participants selected a contactless interaction as one of their top 3 factors influencing their choice of airline.

People are more likely to stay in a **hotel** that offers health and safety assurances and procedures



84% of participants selected a health or safety measure as one of their top 3 factors influencing their choice of hotel.

78% of participants selected a contactless interaction as one of their top 3 factors influencing their choice of hotel.

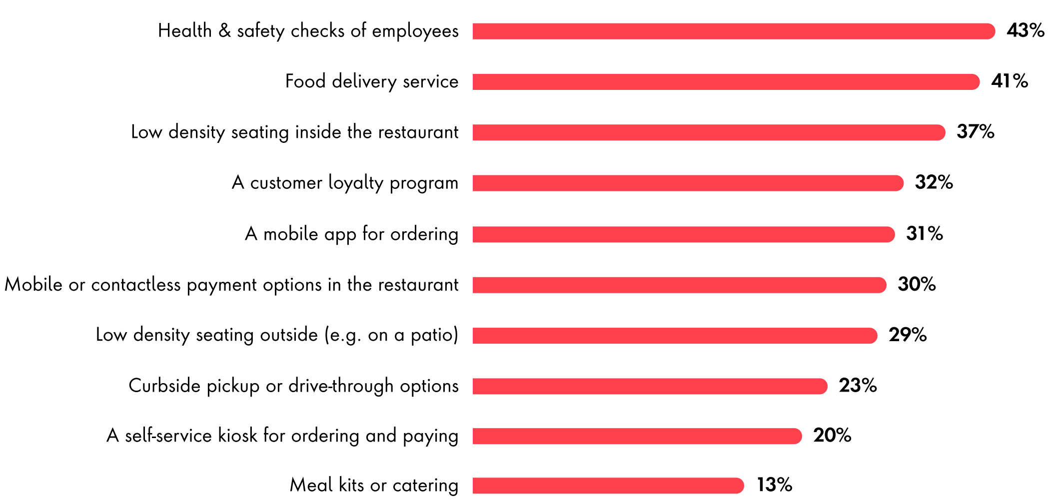
Companies are working to meet these new health expectations. For example, the Four Seasons Hotel in New York City, which endured one of the largest outbreaks in the U.S. at the onset of the pandemic, has implemented practices such as taking guests' temperatures and limiting the number of staff and guests in common areas. Other companies have turned to strategic partners. Hilton Hotels & Resorts partnered with Reckitt Benckiser, the makers of Lysol, to launch its CleanStay program, complete with a comprehensive online guide for visitors to learn more about what to expect when staying at one of Hilton's 6,000+ worldwide locations. United Airlines' CleanPlus program, in partnership with Clorox, provides a similar online resource for passengers to find health information, including what to expect during a trip and how travelers can keep safe while in transit.

Restaurants and dining

Like hotels and airlines, in-person dining has been largely restricted or subject to strict social distancing guidelines. Though diners have expressed interest in trying new restaurants throughout the pandemic, people express similar concerns over employee safety and limited seating when considering returning to physical locations.

Our research finds that 74 percent of diners cite health and safety procedures as one of thetop three factors influencing choice of restaurant.

People are more likely to dine in a restaurant that offers health and safety assurances and procedures



55%
of participants selected a contactless interaction as one of their top 3 factors influencing their choice of restaurant.

Contactless interactions fuel the future of travel and dining

With health and safety at the forefront, accelerating digital and adapting dining and travel experiences through contactless technology is an important measure to not only address anxiety around social distancing, but to alleviate it.

When asked what would make people feel more at ease, travelers and diners cite digital and contactless services like mobile check-in, booking and payment, reservation confirmation, curbside pickup or delivery and self-service kiosks as preferred ways to interact with restaurants, hotels and airlines. Across all three categories, contactless technology was the most important factor after health and safety measures.

Quick-service restaurants were among the first to accelerate already-existing contactless services like digital menu boards, in-app ordering, self-service kiosks and mobile payment options, while placing a larger focus on take-out, delivery and drive-through. For example, KFC restaurants in China are using QR codes to help diners quickly access menus and place orders on their mobile device. In the United States, Colorado-based burger chain Good Times is using AI assistants to automate order-taking and payment, giving staff more time to focus on preparing food and reducing in-person interactions.

Opportunity to enhance digital experiences

Though demand for contactless services is increasing, digital is already an inherent part of travel and dining. Continued integration of contactless services will further enhance digital experiences many travelers and diners already expect from restaurants, airlines, airports and hotels.

At a glance

Contactless technology

78% of travelers choose contactless technologies as one of the top three factors influencing choice of hotel, preferring mobile check-in/check-out, touchless room keys, and paperless invoicing

55% of diners choose contactless technologies as one of the top three factors influencing choice of restaurant, preferring mobile apps, contactless payment, self-service kiosks and curbside delivery/pickup

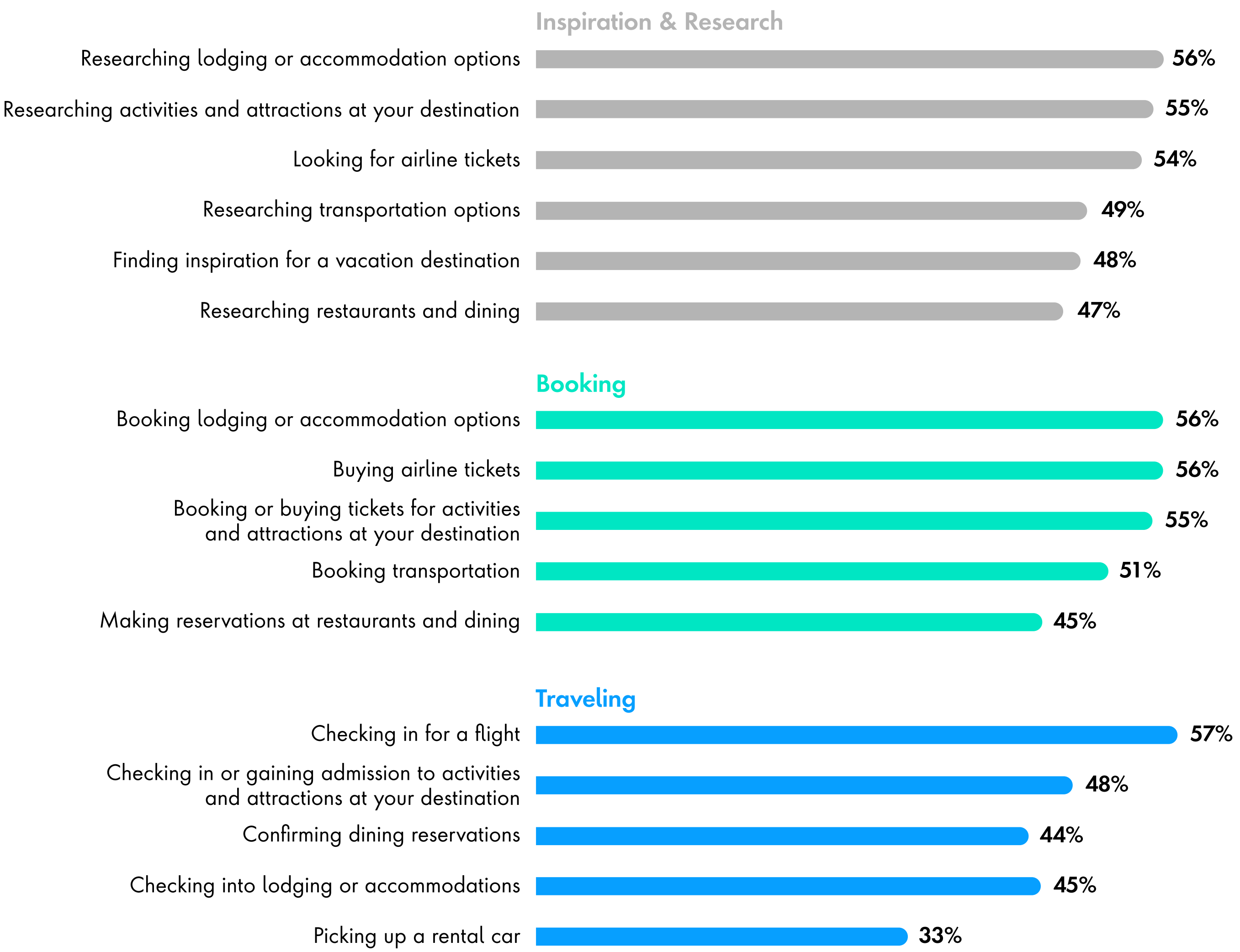
40% of travelers choose contactless technologies as one of the top three factors influencing choice of airline, preferring contactless check-in and baggage check kiosks

At a glance

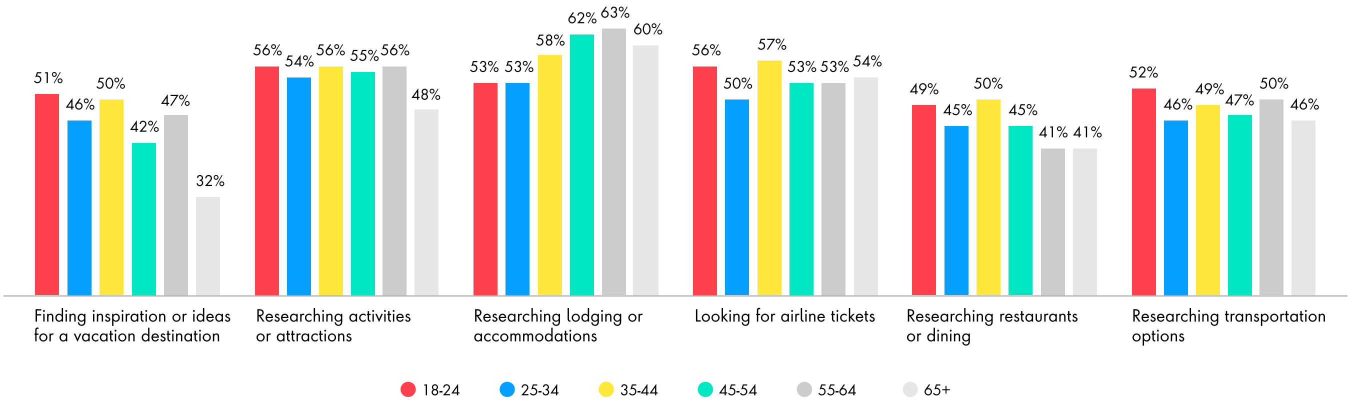
Singapore

Of the travelers we surveyed, people from Singapore are more likely to go online to research travel (61 percent), activities (64 percent) and dining (62 percent), book accommodations (65 percent) and flights (66 percent) and check-in (62 percent) using digital channels – making travelers from that region more inclined to manage the entire travel journey using technology when compared to travelers from other regions.

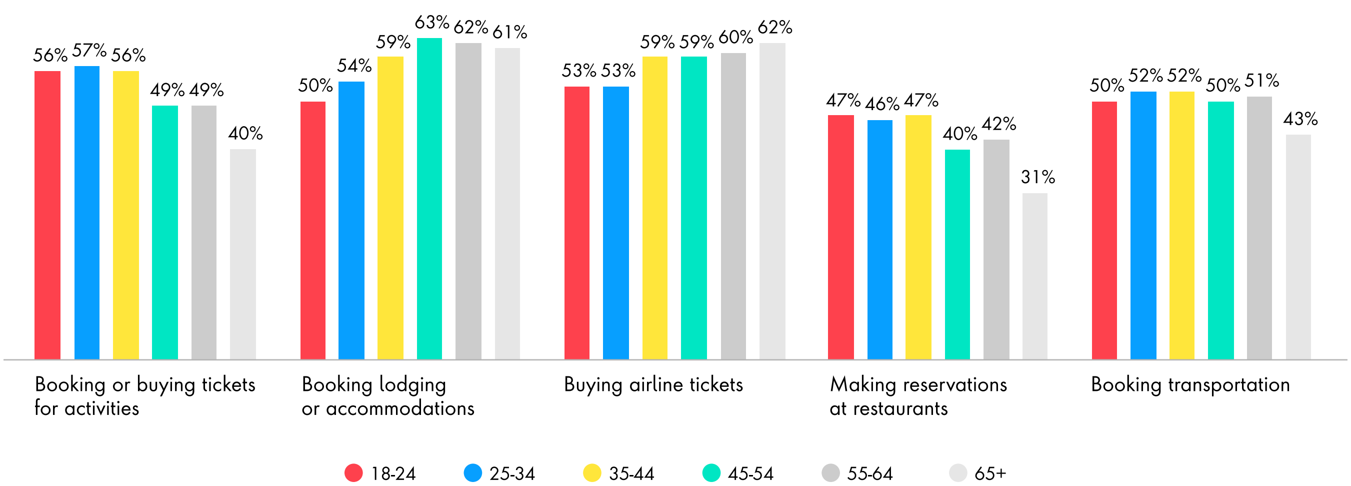
When it comes to planning, booking and participating in vacation activities, most participants favor using digital tools over having a person help them



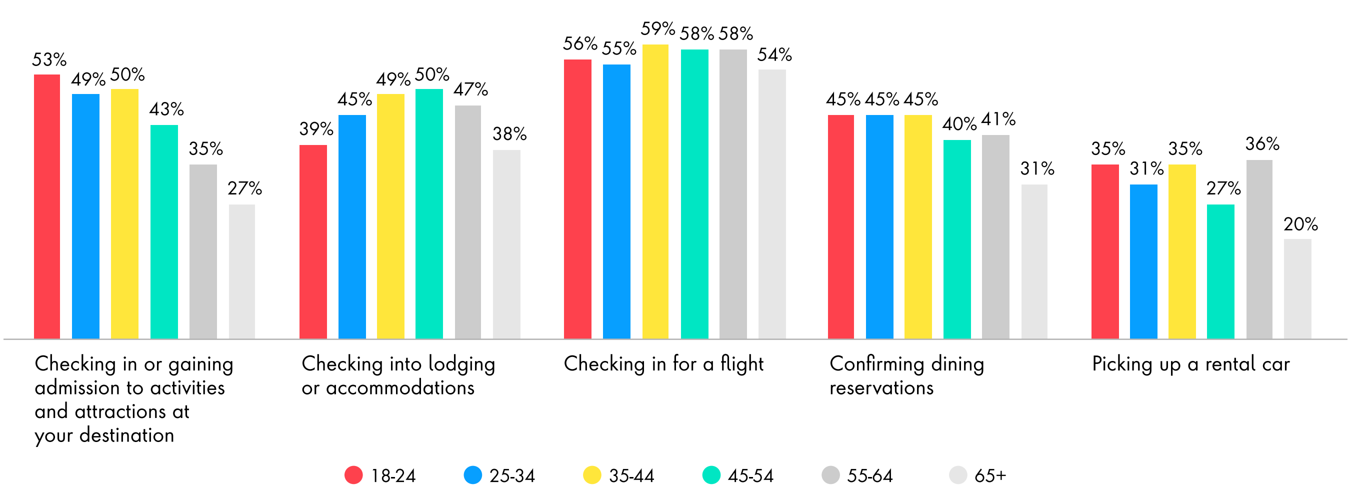
When it comes to **planning** vacation activities, most participants favor using digital tools over having a person help them



When it comes to **booking** vacation activities, most participants favor using digital tools over having a person help them

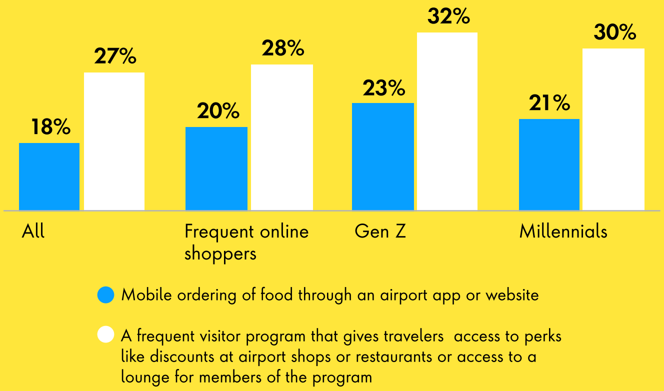


Age is a stronger factor for the preference for digital while on vacation. Those 65+ are least likely to have a digital preference with the exception of checking in for a flight.



Travelers are more willing to travel through airports that offer contactless services

Hotels, airports and airlines also have opportunity to integrate digital tools people find elsewhere into the travel journey. In-app mobile ordering and more robust digital loyalty programs are both areas of opportunity to elevate airport experiences for people looking to shop and dine while in transit.



The digital life of travelers and diners

Travel and dining were a coveted part of pre-pandemic life that already benefitted from digital experiences. As people look hesitantly towards the future in this "new normal," travel and dining companies have the opportunity to elevate experiences, while keeping the health and safety of guests in mind.

Expand contactless services

Make contactless options more accessible with services like digital menu boards and optimized mobile apps that give diners and travelers access to services while limiting in-person interactions.

Make people feel safe

With health and safety a primary concern, travel and hospitality companies should focus on creating experiences that make people feel comfortable and safe. Provide transparency around cleaning and employee health procedures, and communicate options that allow people to feel more confident when making travel and dining decisions.

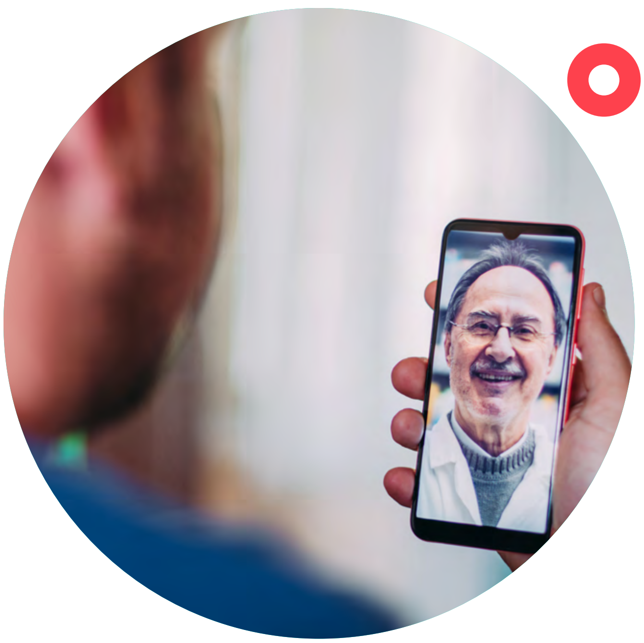
Create more integrated travel journeys

People already expect digital services to be a part of the travel journey. Personalized services that connect across all touchpoints elevate these experiences and promote brand loyalty.

Convenience vs. Confidence: Where Patients Draw the Line on Telehealth

Key findings

- **Patients see telehealth as a safe, convenient alternative.** Pandemic conditions make in-person healthcare seem riskier to patients, with more people willing to try the service – many for the first time.
- **Repeat telehealth patients want more.** Those who try telehealth are more willing to use it again, opening the door for deeper adoption.
- **Despite convenience, some patients just don't feel comfortable**. Patients don't always trust digital channels for sharing health data, with privacy concerns a barrier to entry.
- **Better user experiences will defy barriers to entry.** Poor user experiences make it difficult for patients to find the critical information they need online.



Telehealth services help patients connect with their doctors and healthcare providers from home. Though the service has grown over the last few years, the global pandemic has accelerated adoption as people seek alternatives to in-person visits.

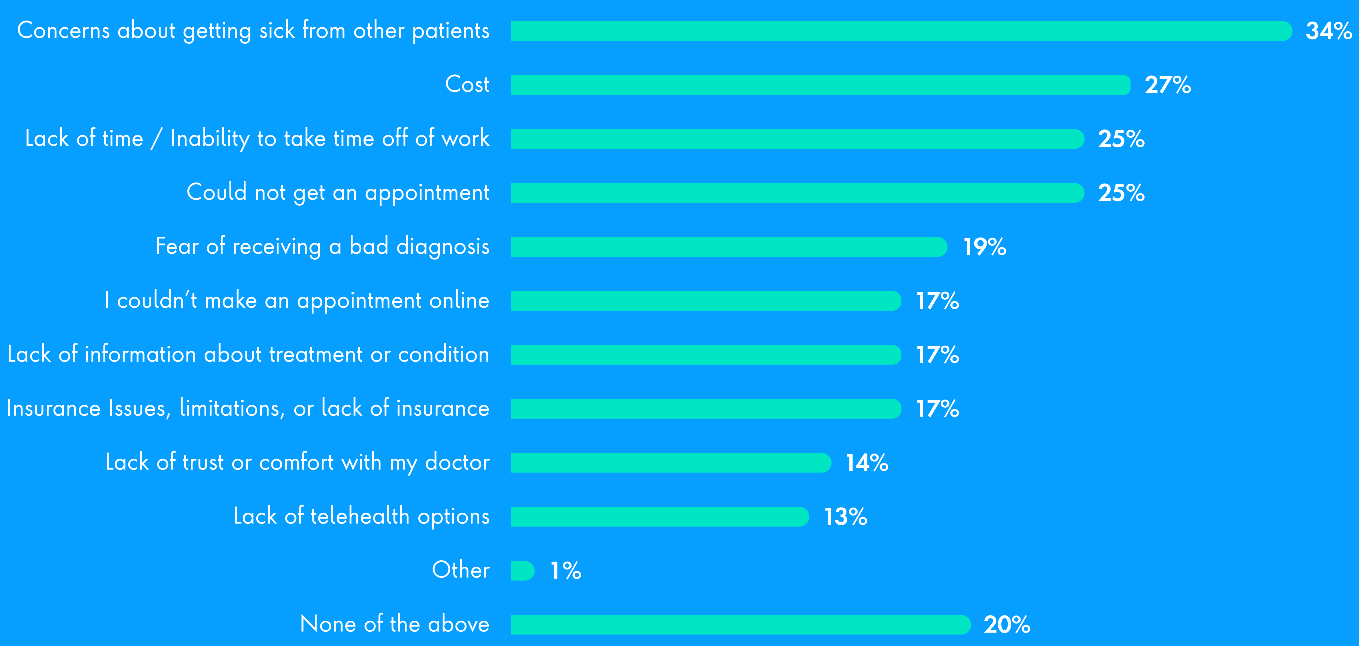
Our research finds that people who have tried telehealth before are more willing to use it again. However, providers will shape telehealth's future by creating better digital experiences, offering more accessibility to critical information online and addressing privacy concerns that serve as a barrier to entry for many patients.

A healthier option to in-person care

According to our research, patients began to view healthcare differently throughout the pandemic. As cases increased globally, patients delayed some medical procedures, like elective surgery, as hospitals shifted resources to fighting COVID-19. Other healthcare services, like mental-health consultations, primary-care visits and dentistry also became restricted, forcing patients to delay care or consider digital alternatives.

Patients who delayed care say risk of getting sick from other patients through in-person visits is their biggest concern – suggesting people may not be comfortable at physical locations until pandemic conditions improve. Cost also plays a role, with patients facing times of economic instability.

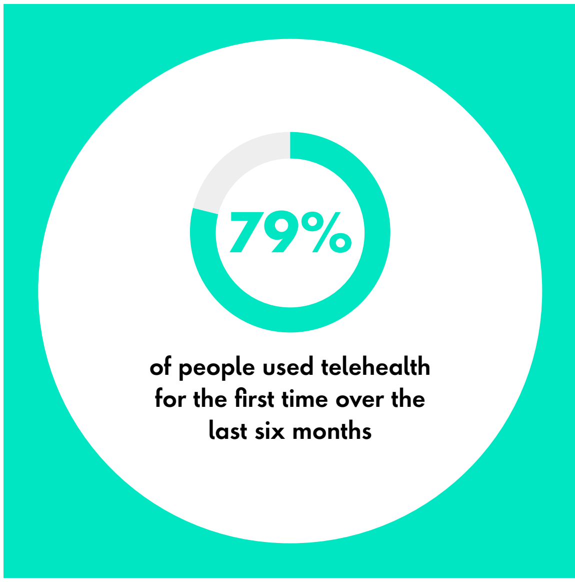
Reasons for delaying healthcare



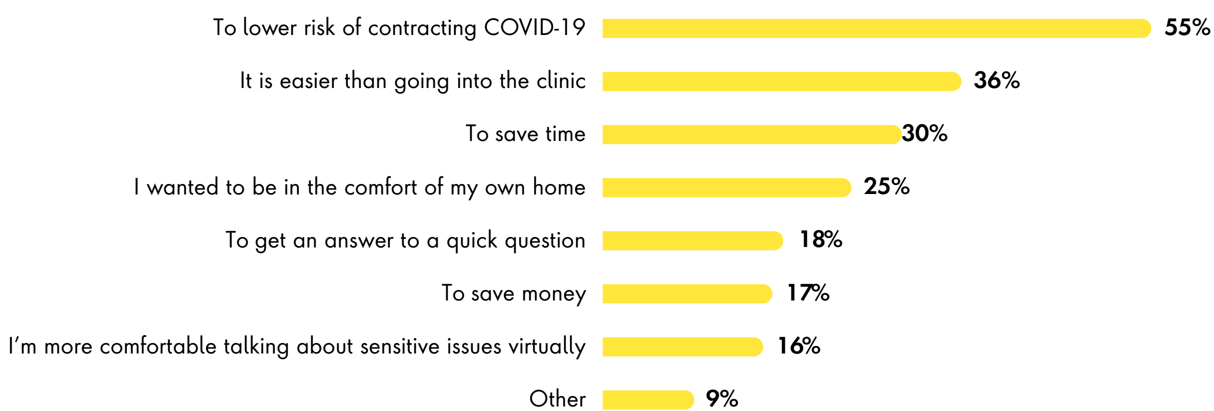
For those looking for alternatives, telehealth became a viable option – one that reduces risk, while providing convenience and reduced costs associated with traveling to a doctor's office or hospital. Our research finds that of all of the people that use telehealth, 79 percent tried the service for the first time over the last six months.

More accessibility to telehealth via private and government-led programs also led to an increase in adoption. The United States government, for example, expanded telehealth services to around 62 million Medicare recipients, allowing more people to get access to the service. Telehealth services also help providers. Research shows that emergency rooms equipped with telehealth services reduces unnecessary ambulatory transfers by as much as 56 percent and improves response time by as much as 44 minutes – making it easier for emergency responders to deliver critical care more efficiently, while further reducing cost for patients who could be treated another way.

Companies have been working to ease providers' burden of care through new technologies. In China, JD Health, WeDoctor and Alibaba's Ali Health are increasing telehealth services. In the UK, Babylon Health is deploying chatbots to help patients identify COVID-19 symptoms though a quick series of online questions. In the U.S., services like Teladoc and Anthem's LiveHealth are making it easier for patients to connect with physicians. In France, e-health platform Anamnesis is using artificial intelligence to collect and analyze patient data to provide doctors with more comprehensive information ahead of a consultation.



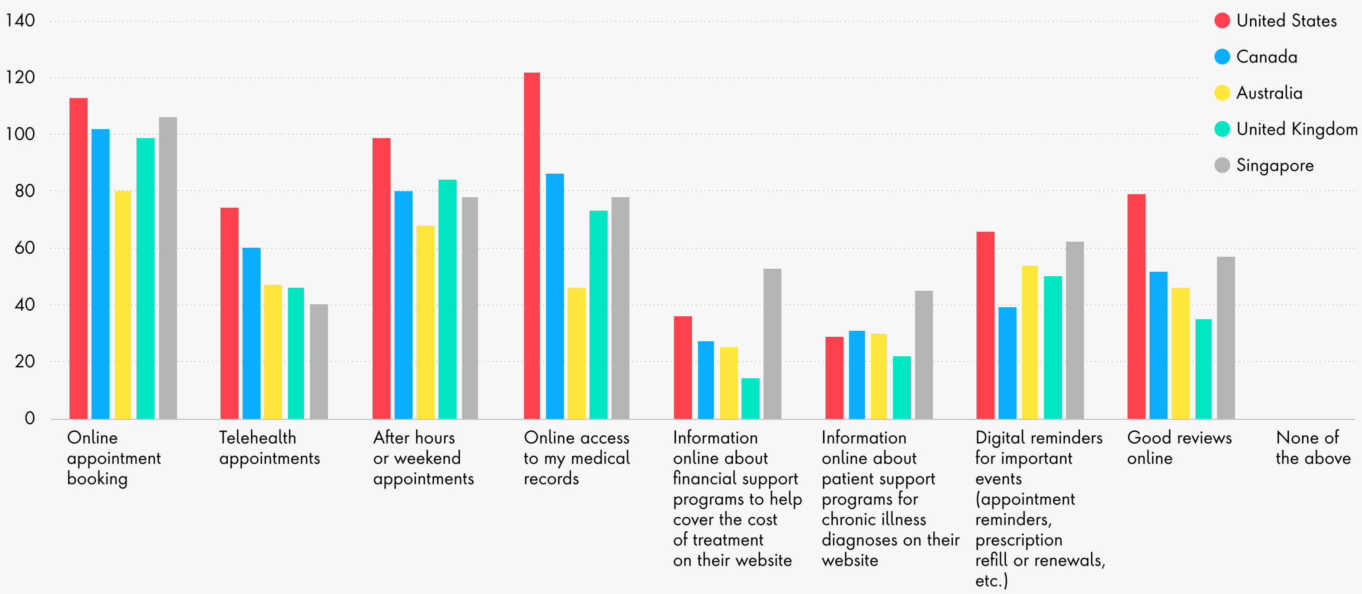
Why did you choose telehealth?

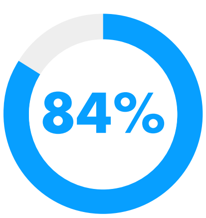


Telehealth trials see positive results

With increased accessibility, more patients are comfortable with integrating telehealth into their routines. Patients say they're interested in services that let them ask questions related to follow-ups, pre-existing conditions, symptoms, prescriptions and to determine whether or not an in-person visit is needed – all things that could prevent or delay an in-person interaction.

What types of healthcare questions or topics would you use or consider telehealth for?

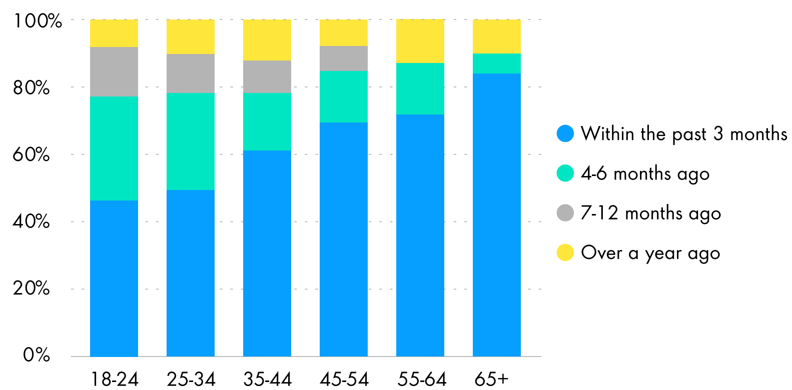




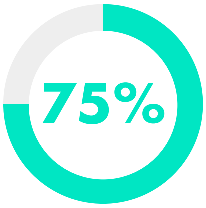
Patients ages 65+ were among the largest population to try telehealth for the first time

Patients ages 65+ were among the largest population to try the service for the first time amid the pandemic (84 percent). These patients opt for telehealth largely due to increased health risks associated with in-person visits (73 percent). Although older users are not digitally native, almost half (49 percent) say they find telehealth experiences easy to use. In this case, telehealth serves as a resource for patients looking to reduce risk, allowing them to get the answers they need in an environment that makes them feel safe.

Approximately when was the first time you used telehealth?



Privacy remains a primary concern as healthcare becomes more digital

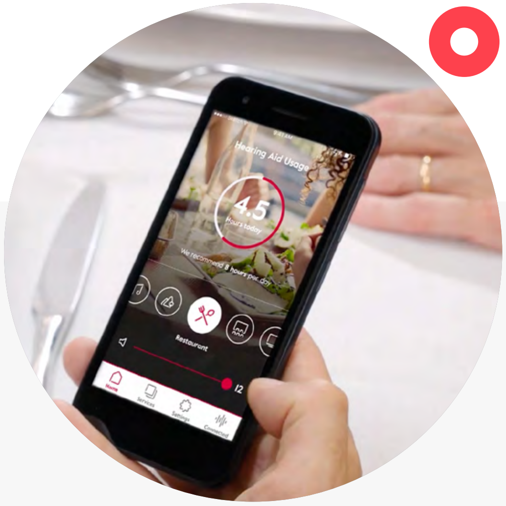


said it was important or very important for healthcare professionals to have digital access to their records

For patients whose needs did not require an in-person visit, those who chose not to use telehealth services say they feel uncomfortable using video technology or discussing medical issues online. This is apparent when discussing intimate healthcare issues, like sexual or mental health, which ranked lowest among services patients sought via telehealth.

This discomfort could tie to feelings of privacy and trust, which continue to remain one of the biggest challenges for telehealth. On one hand, our research finds that 75 percent of patients feel it's important or very important for healthcare providers to have access to their records digitally. Research also shows that people in the U.S. are also more willing to share health data related to heart rate, blood pressure and diet – metrics that tie to daily habits.

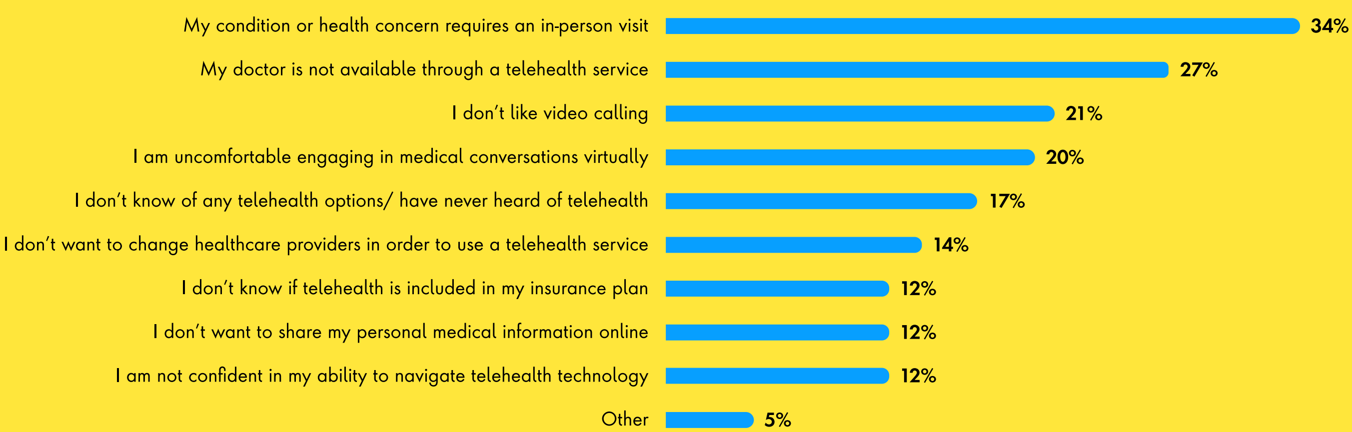
Conversely, a GlobalWebIndex (GWI) study of U.S. and UK patients finds that while there is growing demand for digital health services, people still deeply value in-person connections with their doctor, with more than half preferring phone calls and physical meetings over digital channels like video, email, and text. Patients are most comfortable sharing health data through devices and channels that they are familiar with and comfortable using, like smartphones or personal computers.



Italian healthcare company Amplifon's mobile app helps people quickly adjust to using their hearing aid, with instructions, advice and the ability to adjust sound levels conveniently from a smart phone.

Read case study

Why didn't you use telehealth for your visit?



Healthcare lags in digital experience

Though more people are using telehealth, patients are also running into issues using online services, revealing weaknesses in user experience – especially when it comes to providing personalized telehealth.

For example, patients say third-party medical information sites are the most useful online resource for research, leaving room for improvement for healthcare providers to share more relevant information on their own websites.

At a glance

Telehealth experiences

Of those who said they use telehealth:

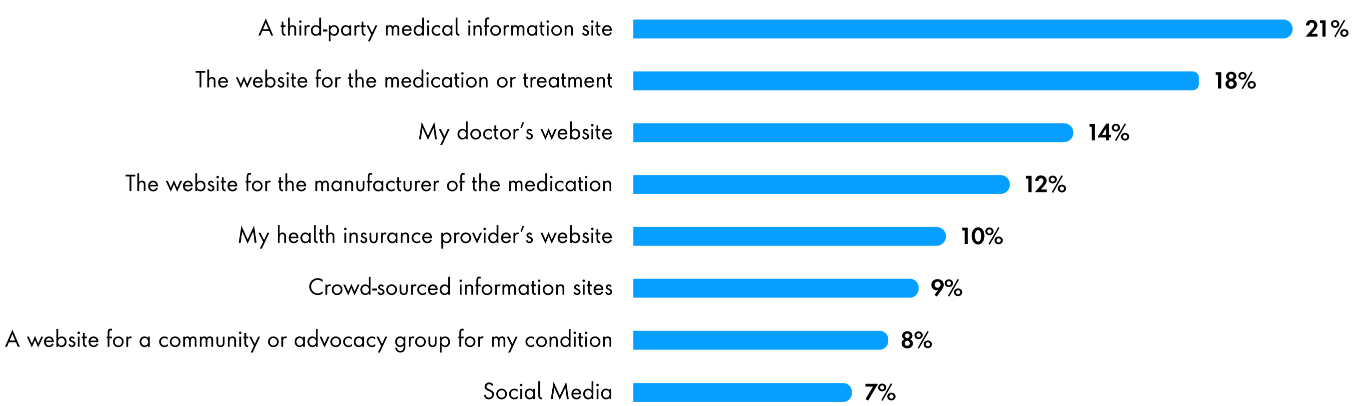
58% say it was easy to find a quiet or private place for their visit

51% say telehealth apps or sites are easy to use

40% say telehealth apps or sites are personalized for them

62% say their telehealth health care professional has access to their medical records

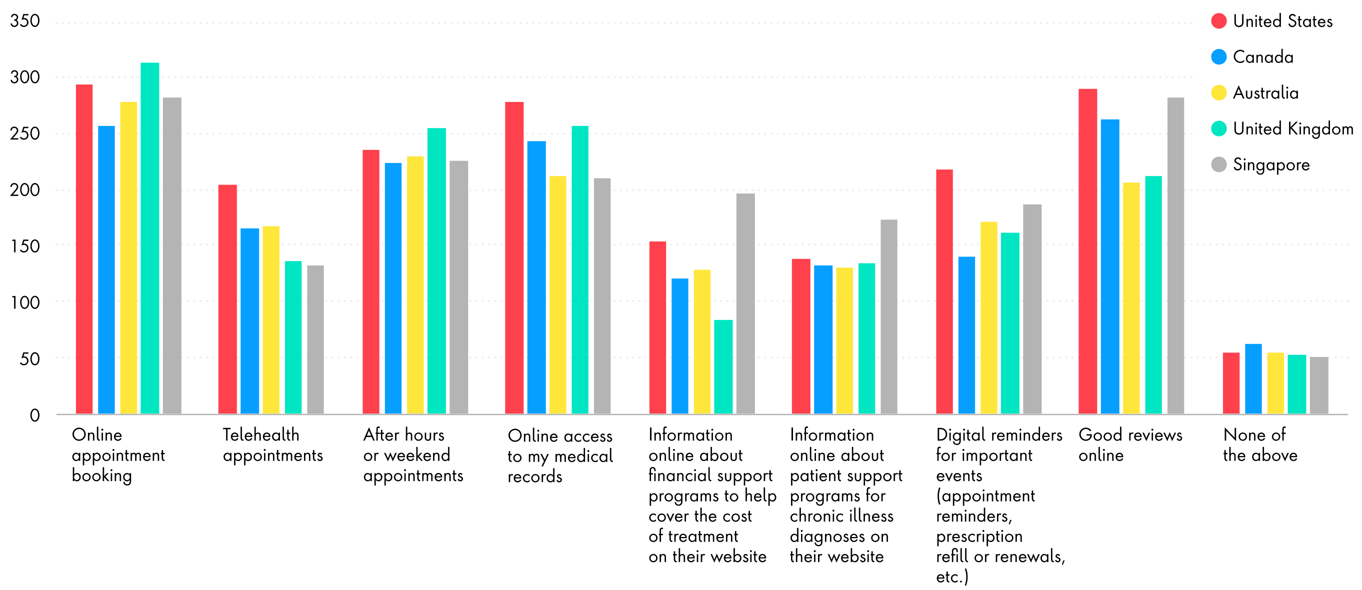
Which of the following online resources for information about medication treatment do you find most useful?



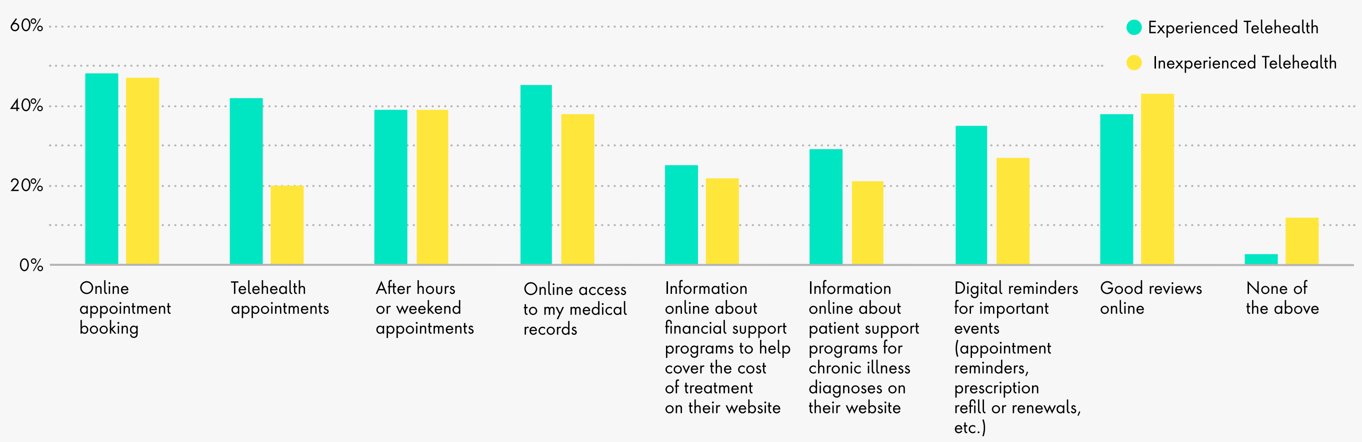
Access to online offerings outside of telehealth, like the ability to book appointments, also influences which healthcare provider patients prefer.

More experienced telehealth users are more likely to prefer doctors that offer telehealth. For those with less experience using digital services, online reviews play a more important role as patients evaluate new services.

I am more likely to see a doctor that has...



I am more likely to see a doctor that offers...



The digital life of healthcare providers

Over the last several months, telehealth has provided patients with a safer and more convenient way to manage healthcare needs. As patients become more accustomed to telehealth, companies have the opportunity to improve digital experiences, optimize their own processes and reduce cost in the wake of heightened demand.

Expand applications of telehealth and other digital health services

As patients continue to adopt telehealth, consider how to expand programs to cater to more services, like virtual visits, emergency care, symptom identification and medication monitoring outside of the office.

Consider experience

Patients want to access telehealth services using tools and technologies with which they are comfortable. By better understanding patient needs, healthcare providers can create seamless, omnichannel experiences that allow patients to easily access online portals, monitor symptoms, book appointments and communicate with providers in a way that better connects all points of the patient journey.

Make information more accessible

Ensure patients find what they need by providing relevant information quickly and effectively. In times of emergency, a crisis communications platform helps healthcare institutions coordinate these efforts by providing greater visibility and quick response when need for information is critical.

Explore new technologies

Chatbots, mobile apps, artificial intelligence and personalization accelerate speed and efficiency of telehealth services, while providing customized experiences for patients accessing care online.

GET IN TOUCH

to discuss how you can apply these learnings to your own digital business initiatives.

RAY VELEZ
Chief Technology Officer
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