



Time to double down on humanity

2020 has been an exhausting year, and it's only mid-summer. We are in the midst of a global pandemic, economic turbulence, and an overdue reckoning with systemic racism. We rightly think of these as crises about health, economics, and justice—**but fundamentally, they call into question what we value as humans and our most pressing priorities.** Ongoing disruption and heightened uncertainty are testing our humanity with the hope of elevating it.

These compounding crises have fractured the essential bond between humans—trust. The rift in trust between humans and organizations is especially alarming. Only 4% of people cite their employer, local businesses, or major businesses as the source they trust to let them know when it is safe to resume normal activities.¹ So, how should businesses address this gap?

Amid the uncertainty all humans face today, organizations need to take steps to **become more human themselves**: this starts with re-evaluating their own values. They need to understand who they are before responding authentically based on a new order of priorities: trust, safety, and connection. Organizations also need to deeply understand those they care most about—their customers, workforce, and partners—in order to **Elevate the Human Experience (EHX™)**.

How we got here

It's easy to get lost in all the headlines and reporting trying to make sense of this moment. Rather than rely on history or try to predict the future, we decided to focus on the human stories of today. We explored individuals' experiences through remote ethnographies, surveys, virtual discussion boards, and

interviews. We listened for hours to stories about job loss, mental health, shifting home dynamics, and interactions with strangers. Looking across these stories, we've summarized the emotional states throughout the pandemic thus far (captured in Illustration A), which illustrates the collective phases shared by many—from a sense of hopelessness to temporary peace.

Recognizing that everyone's experience is different, many of us can identify with one if not more of the phases across this emotional range. In fact, our 16,000-person study revealed that most of us identify with one of three core behavior patterns, or **Clusters** (Illustration B). Some are Protectors, who are feeling anxious, acting with concern for personal and public health. Others identify as Prevailers, who are feeling skeptical, acting with confidence, tolerant of higher health risks and believe in getting back to "normal." Somewhere in between

are Pragmatists, who are feeling calm and acting with balance, mindful of the public good and accepting of the current state.

For all three of these Clusters, there will likely be a new order of priorities, colored by their distinct attitudes and values. Understanding the nuanced similarities and differences between these behavior patterns—and recognizing that they may shift over time—organizations can take more comprehensive action.

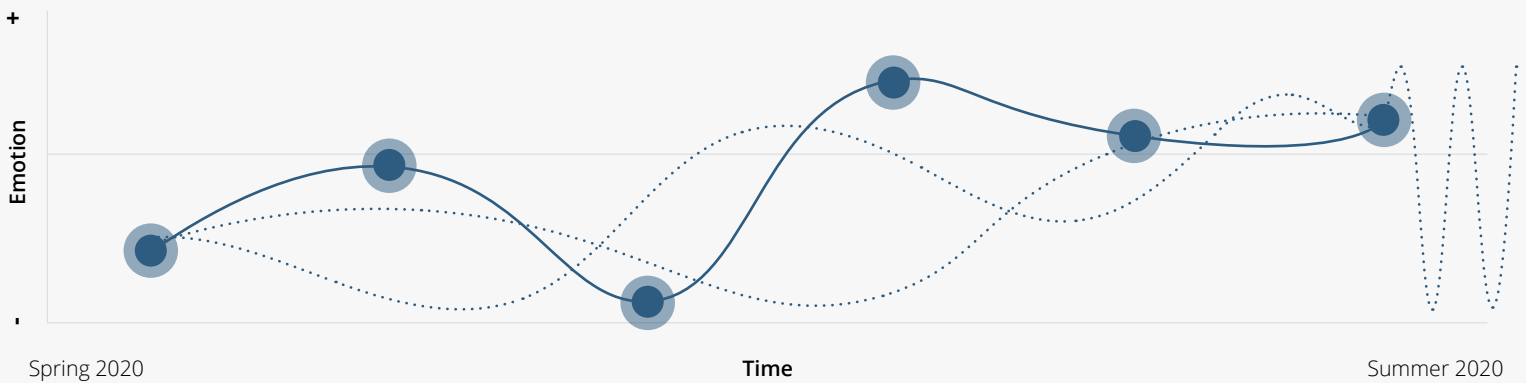
Building Trust

It's worth repeating: trust is fractured among Americans. **Nearly two-thirds of Americans don't trust each other to social distance (60%).²** Since trust is the foundation that grounds any human experience, it's nearly impossible to build successful, lasting relationships without it.

Illustration A

Emotional Phases of the Pandemic

Below is a visual summary of collective emotional phases across participants—meaning they are not linear and not all individuals will experience every phase.



Loss of control and panic

Participants' stress levels were high from crises out of their control; the uncertainty of the economic and public health impact caused most people to frantically stock up and limit spending to the essentials

The search for stability

As individuals adjusted to their routine, many invested time to self-reflect and identify what they could do to regain purpose; others looked for stability through familiar activities

A sense of hopelessness

Some who experienced extensive trauma, such as losing a loved one due to COVID or experiencing prolonged financial stress, drifted into a state of hopelessness

A productive streak

Some participants felt motivated to focus on self-improvement and self-care, lasting only for some—some maintained their new habits, while others rejected any pressures to stay productive

Temporary peace and letting go

Some individuals experienced a sense of acceptance and rejected pressures to stay productive, using the abundance of time to relax, reset and even enjoy

Cautious hope of reopening and spikes of fear

Some felt excited about returning to activities, but most felt lingering anxiety, exacerbated by the return of the virus in parts of the country—resulting in spikes of fear and exhaustion

...followed by perpetual uncertainty

Many participants feel they are stuck in limbo and have shared anxiety about the potential for a second wave of COVID and the uneasy feelings that this period doesn't have a definitive ending

Illustration B
Cluster Overview

Each Cluster is named to convey the mindsets and motivations of the individuals within it.

Protectors

*Feeling anxious,
acting with concern*

Laser-focused on public health, Protectors are both concerned for their own safety and taking active steps towards protecting the health of others

Pragmatists

*Feeling calm,
acting with balance*

Invested in the public good with an emphasis on minimizing health risks, yet open-minded and balanced with the economic tradeoff

Prevailers

*Feeling skeptical,
acting with confidence*

Resistant to COVID-19 disruptions with a tendency to prioritize the economy, proud of personal freedoms and support for local businesses



Health before Economy

Level of priority for protecting health over getting the economy going again

Routine before Risk

Level of priority for maintaining routine over concern for contracting the virus

Action before Impact

Level of perceived ability to impact safety of community with personal actions

Source: Cluster Analysis, Deloitte HX in Uncertainty Survey, Deloitte Consulting LLP, 2020

One participant shared his perspective:

“I trust myself and most of my friends. My only scare in the whole pandemic has always been other people...” (Evan Q., 42, Chicago).³

Humans’ heightened trust of self, combined with a decreased trust of strangers plays out in many ways, resulting in a pronounced distinction between ‘in-group’ and ‘out-group.’ This can result in a double standard of accepting of pandemic guidelines—for example, **70% of participants would want temperature checks for employees, but about half would want the same practice for themselves.**⁴

Although 84% of Americans believe that prioritizing public health is equally or more important than getting the economy going again⁵, an inherent tension remains between preserving individual freedoms and protecting public safety. During our research, people supported policies that protect collective public health but opposed their active enforcement. Specifically, many responded favorably to signs at the entrance of stores that say, “No Mask, No Service,” but negatively to the presence of an authority figure to enforce that policy.

So, what can organizations do to help address the erosion of trust? To start, organizations should **‘make the right choice the easy choice’, enabling the path of least resistance to follow new guidelines or protocols in place.**⁶ Continuing with the example of “No Mask, No Service,” stores could also provide complimentary disposable masks as a visual reminder and nudge to wear one, which will appease both Protectors and Prevailers. Risk-averse Protectors can take comfort in the clear presence of guidelines, while individualistic Prevailers will likely appreciate the unobtrusive approach.

As organizations take actions to rebuild trust, our **HX TrustID™** is a proprietary trust score that can help companies understand their trust performance and resulting employee and customer behaviors. Trust is assessed and analyzed through four integrated signals: Humanity, Transparency, Capability, and Reliability. The HX TrustID allows organizations to quantify the relationship between trust beliefs and behaviors by connecting what people say with what they actually do. For example, we know that if a brand exhibits humanity, employees are 2.6x more likely to feel motivated at work; if a brand exhibits transparency, customers are 2.8x more likely to continue purchasing after a data breach.⁷ Clearly, a key tenet of regaining and building trust is transparency of information, but what does transparency mean for safety right now?

Signaling Safety

Love it or hate it: most of us want to see security objects like hand sanitizer dispensers and disinfectant wipes when we walk into a store.

For a virus we can't see, nearly all of respondents believe visible mechanisms of safety and cleanliness to be most or somewhat important (85%).⁸

Beyond the reassurance provided by these security objects, many want to *control* the level of safety within new environments as much as we can: **84% of customers want personal control of cleaning.**⁹ For example, customers might prefer being given their own disinfectant wipes to wipe down a grocery cart rather than having the cart be wiped down for them by an employee.

New expectations for safety demand that organizations act to secure the environment—for workforce as well as customers.

Nearly all employees want to ensure they can limit physical interaction with customers (83%).¹⁰

Source: Deloitte HX in Uncertainty Survey, Deloitte Consulting LLP, 2020

Taking a human-centric approach, organizations can commit to employees' protection and a better customer experience by consciously addressing safety and comfort measures for their workforce as well as their customers.

In fact, 82% of customers want companies to be willing to take extra steps to ensure the safety and well-being of their employees, citing that this must be in place or would make them more likely to visit a business.¹¹

Hotels, for example, can build off existing investments in contactless check-in and digital keys to help ensure not only seamless experiences for guests, but also safety and comfort for employees. To bolster the sense of safety, Protectors may value additional sensory signals—such as employees cleaning the lobby and the scent of cleaning products. Contact tracing, enabled by data from a trusted health authority, can resonate with Pragmatists, who want to be informed with the trade-offs to make conscientious decisions.

As organizations consider changes to help ensure in-person experiences feel human and safe, the most tangible constraint is the physical distancing guidelines.

Redefining Connection

Our human connections have been transformed into two-dimensional virtual alternatives and newly orchestrated social dances. New norms have emerged for rare

in-person interactions to balance safety concerns with human connection—including unspoken communication and exaggerated physical movements to negotiate space. And while digital platforms have served as an adequate substitute for many interactions, it feels like there is still something missing. It doesn't *feel* the same as in-person. **In fact, more than half of our participants wanted their virtual experiences to feel more 'human.'**¹² Despite attempts to maintain normalcy, **participants experienced diminishing returns due to technology's inability to replicate certain in-person experiences.**¹³ The initial appeal of video happy hours with coworkers, church services, and intimate concerts with our favorite artists may have waned—inadequately matching the emotional benefit of in-person human contact.

Humans crave contact with other humans, making some form of in-person interactions required in the short-term and necessary in the long-term. How will organizations evolve to accommodate the need for social connection amidst physical distancing? Starting with their humans in the short-term, organizations should continue to train employees on new protocols and de-escalation tactics in the absence of visual or verbal cues to help them better navigate customer boundaries for comfort. Pragmatists will be most likely to engage with this balanced approach to negotiate space. In the long-term, organizations can reconfigure physical space to demonstrate active, ongoing safety improvements while ensuring both employees and customers have adequate space to feel comfortable. Restaurants are already taking note as they reopen, providing delineated spaces for social connection. As champions of local business, Prevailers will no doubt be among their first returning patrons—eager for a new adventure with fellow humans.

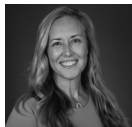
Where do we go from here?

The future has always been uncertain—only now we are painfully aware of it. What we *do* know is that people are paying attention to organizations' responses to crises—from COVID-19 to systemic racism—and judging whether an organization's values and actions align with their own evolving ones.

Organizations that transform themselves to be more human will have conducted a deep evaluation and possible reinvention of their brands' purpose and values.

Those that act quickly can capture loyalty via human-centric transformations in the coming months to build a legacy of loyalty in the coming years. As a leader, now is the time to **build trust, signal safety, and redefine connection.**

Curious to learn more? Read our [**full research report.**](#)



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End notes

1. Deloitte HX TrustID Survey, 7,500 respondents, May 2020
2. Deloitte HX in Uncertainty Survey, 16,000 respondents, May 2020
3. Deloitte Ethnographic Interviews, 53 participants, June 2020
4. Ibid, (2)
5. Ibid, (2)
6. Expert Interview with Dr. Rhodri Dierst-Davies, May 28th, 2020
7. Ibid, (1)
8. Deloitte Safety & Cleanliness Survey, 5,000 respondents, Deloitte Consulting LLP, 2020
9. Ibid, (8)
10. Ibid, (2)
11. Ibid, (2)
12. Ibid, (2)
13. Ibid, (3)

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