



## Human Experience in times of uncertainty

As humans, uncertainty makes us uncomfortable. We look for patterns. We compare our experiences to the past, making references to war times, plagues, and recessions. Or we look to whichever oracle or news outlet is willing to predict the future, giving us an easy reprieve from our discomfort, reading pronouncements of what will stay the same or be changed forever. Is it good for children to grow up wearing face masks and attending school online? Is it bad that Friday night happy hour shifted from the backyard to the laptop? We should resist the urge to seek simple certainty—the solid ground of ‘this is good’ or ‘this is bad’ would feel so much safer than not knowing what comes next.

Instead, we should sit with the uncertainty, becoming even more attentive to the human experience as it changes all around us. Now, more than ever, it is the human experience that matters.

We know organizations that focus on the [human experience](#) of their customers (CX), workforce (WX), and partners in their supply chain (PX) are twice as likely to outperform their peers

in revenue growth over a three-year period. We also know that retaining customers, as well as employees, saves money: acquiring a new customer can cost six to seven times more than retaining an existing customer, and boosting customer retention rates by 5% can increase profitability by 25-95%.<sup>1</sup> Organizations spend nearly \$4,000 to hire each new employee, and nearly three times that amount on training.<sup>2</sup> Therefore, we must become observant students of human behaviors, values, and needs, because ***those organizations that understand best what it means to be human, anticipating and meeting the deeply human needs as they change, will likely be the first to recover and thrive.***

In a recent 3,000-person poll, the significant majority of C-suite executives said that they believe elevating the human experience should be a top priority for their organization, yet 96% of them struggled to design and launch anything resembling human-centered experiences.<sup>3</sup> To help senior executives make decisions even when clear answers of ‘good’ or ‘bad,’ ‘open’ the economy or ‘remain closed’ are not available,

We believe that there are three trends worth paying attention to: making digital experiences more human, focusing on core human values, and investing in building trust.

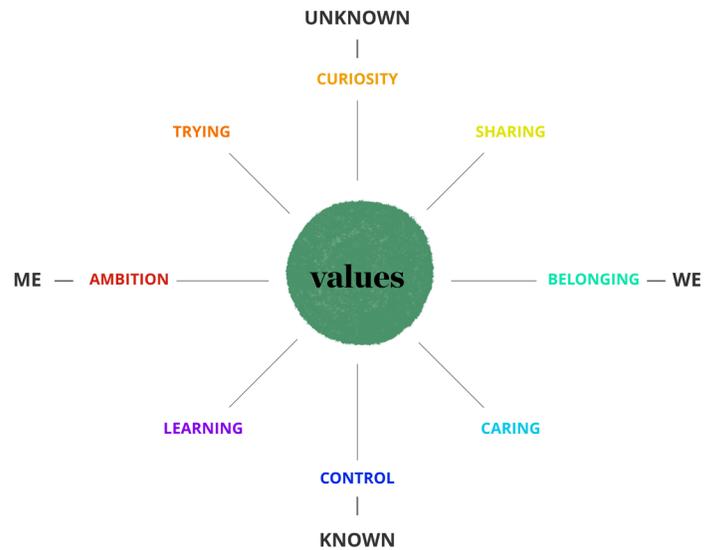
# 1. Making digital experiences feel more human

Our lives digitized seemingly overnight as work, school, doctor's visits, church, and even yoga came to us through wifi. Downloads of video streaming apps increased more than 100% in the past few weeks.<sup>4</sup> In Deloitte's most recent Global Marketing Trends study, 65% of United States respondents have tried at least one new digital activity for the first time since the COVID-19 pandemic.<sup>5</sup> The most common are video chatting with friends or family (31%), ordering groceries online (29%), and buying food from a restaurant with an app (21%). Consistently, more than a third find their digital experiences to be a superior alternative—meaning we are growing increasingly aware that our perceptions of what could only be done face-to-face is shifting to include digital face-to-face. Maybe not every client meeting or important family milestone requires cross-country air travel anymore. Likewise, organizations cannot transform their digital experience fast enough—many are shifting to a [hybrid business model](#) where we order online and pickup curbside and bypass human touch altogether. And yet, we end the day feeling like zo(o)mbies burnt out from so much digital interaction that lacks human connection. We build up a [human experience deficit](#), in which we long for anything that feels like an authentic smile, one that isn't hidden by a mask. Our digital consumption compares to junk food consumption—ultimately unsatisfying and unhealthy.

That is why the organizations that figure out how to communicate authentically and empathetically will be the ones we seek out. Medical practitioners are learning new etiquette for consulting with patients online: eye-contact, facial cues, and playing back the words of their patients. Banks are investing in conversational AI and reaching out to customers with personalized messages, knowing that the needs of small business owners who had their livelihoods disrupted are different than retirees whose nest egg dissolved in days.<sup>6</sup> While nothing will replace the human touch of a hug from a loved one, we can pay attention to what it means to imprint a more human experience into our digital lives to foster the kind of economic and personal recovery we all need.

## 2. Focusing on human values

Nothing tests our values like a crisis. To better understand the specific impact of today's uncertainty on our core values, we applied our [HX Values Compass](#), a proprietary algorithm that identifies what matters to humans—the underlying motivations that drive our feelings and actions. Typically, Americans are evenly spread among the eight cardinal values: ambition, trying new things, curiosity, belonging, caring for others, control, and learning new things.



We expected to see signs of stress altering that spread. We were surprised to discover that our values are not changing more rapidly today than they did this time last year. While the immediate impact of the pandemic has put pressure on these values, for the most part, our core values remain intact. How old we are, what we buy, where we live—isn't what actually matters. What drives our feelings and actions in a post-pandemic world are the values we use to approach the world in the first place: are we ambition-focused or belonging-focused, comfortable with the unknown or seeking control? And while these values may temporarily "wobble" based on current events, it's important to remember that values are built over a lifetime. Therefore, organizations will be better positioned to recover faster by identifying, communicating, and acting upon what drives and motivates all the humans in the ecosystem: human values.

## 3. Recognizing the need for trust

As organizations seek to match core values, we believe that trust will become even more critical to delivering on the human experience. After all, there is no such thing as an elevated human experience without trust. As they recover, organizations will likely need to demonstrate their trustworthiness, that they treated their employees and suppliers fairly during the worst moments, and that they have the best interests of their customers in mind. We know that two-thirds of customers are aware of brands positively responding to COVID-19. The top two most recognized positive actions are increasing measures to protect the health and wellness of employees (39%) and donating products or services (32%). Conversely, over one-third of customers strongly agree that negative actions—like failing to protect employees' health or income—has negatively shifted their perception of the brands responsible for those decisions.<sup>7</sup> Trust isn't about certainty and confidence; it is about willingness

to recognize and own limitations. We know that [trust](#) has long-term benefits: customers who are emotionally connected are significantly more likely to rate their experience as good or better than their most recent experience at a competitive venue. They are also more likely to spend more money and “stay with” an organization for longer.<sup>8</sup>

Organizations now have an opportunity to deepen trust with personalized human experiences that meet customers at a point of need. For example, fabric stores are giving away supplies and guidance for their crafting community on making cotton face masks and serving as a collection point for completed masks; some tech companies are offering free programs to assist in learning and working from home. These efforts help those who have an immediate need and allow loyal customers an opportunity to give back.<sup>9</sup>

Organizations must also be conscious that consumers are watching how they **act**, not just what they **say**. As a recent focus group participant noted, “Airlines, hotel, car rentals and other services will have to show me the changes that they’ve made. I just don’t want lip service...no email or ad could fully convince me.”<sup>10</sup> [Hospitality brands are already taking note](#): as Hilton, Airbnb, Marriott, and Hyatt roll out stringent cleanliness

standards, NH Hotel Group and SGS announce a collaboration on Global Disinfection Assessment Seal.<sup>11</sup> Providing assurance of cleanliness and safety will be essential to earning the trust of consumers in the new normal.

The three trends we’ve identified as important to pay attention to during times of uncertainty are interrelated; together, they open up novel opportunities to deliver on the promise of the human experience and help ease some of the discomfort we feel. While some sensory, in-person human experiences can never be replaced, the role of digital has accelerated in our lives. The organizations that invest in making their digital experience more human will likely recover fastest. By understanding the core values of all humans, organizations can continue to deliver curated experiences that reflect those values. These authentic experiences then help you build consumer trust, and in turn, earn their willingness to share data that can lead to even more personalized experiences.

As we look to make sense of what we are all now experiencing, instead of asking ‘is it good?’ or ‘is it bad?’, organizations may recover faster if they ask, ‘**is it human?**’.



### Amelia Dunlop

Chief Experience Officer Deloitte Digital  
amdunlop@deloitte.com



### Ashley Reichheld

Customer, Brand, & Experience Practice Lead for Automotive, Transportation, Hospitality & Services  
areichheld@deloitte.com

### End notes

1. <https://www.forbes.com/sites/jiawertz/2018/09/12/dont-spend-5-times-more-attracting-new-customers-nurture-the-existing-ones/#73fafa55a8e>
2. <https://www.prnewswire.com/news-releases/bersin-by-deloitte-us-spending-on-recruitment-rises-driven-by-increased-competition-for-critical-talent-300070986.html>
3. Deloitte Dbriefs tech trends survey, “Designing emotionally intelligent human experiences”, January 9, 2020.
4. Kate Murphy, “Why Zoom is terrible,” New York Times, April 29, 2020. <https://www.nytimes.com/2020/04/29/sunday-review/zoom-video-conference.html>
5. In April of 2020, Deloitte surveyed 2,060 global consumers from the United States, Mexico, China, South Africa, and the United Kingdom to understand consumer sentiment on a variety of topics pertaining to [Deloitte’s Global Marketing Trends](#) report. The full report and analysis will launch October 15, 2020.
6. Jim Marcus, “Reimagining banking during and after Covid-19,” The Financial Brand, April 1, 2020. <https://thefinancialbrand.com/94256/reimagining-digital-banking-transformed-covid-19-coronavirus-trends/>
7. See endnote 5.
8. Human experience in hospitality: <https://www.deloittedigital.com/us/en/blog-list/2019/elevating-the-human-experience-in-hospitality.html>
9. David Hessekiel, “Creative ways companies are giving back during the Covid-19 crisis,” Forbes.com, March 27, 2020. <https://www.forbes.com/sites/davidhessekiel/2020/03/27/creative-ways-companies-are-giving-back-during-the-covid-19-crisis/#865a0e97f143>
10. Virtual focus group, April 21, 2020.
11. “NH Hotel Group and SGS announce collaboration on a global disinfection assessment seal,” Hospitalitynet.org, April 29, 2020. <https://www.hospitalitynet.org/news/4098400.html>

**About Deloitte** - Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.

This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.