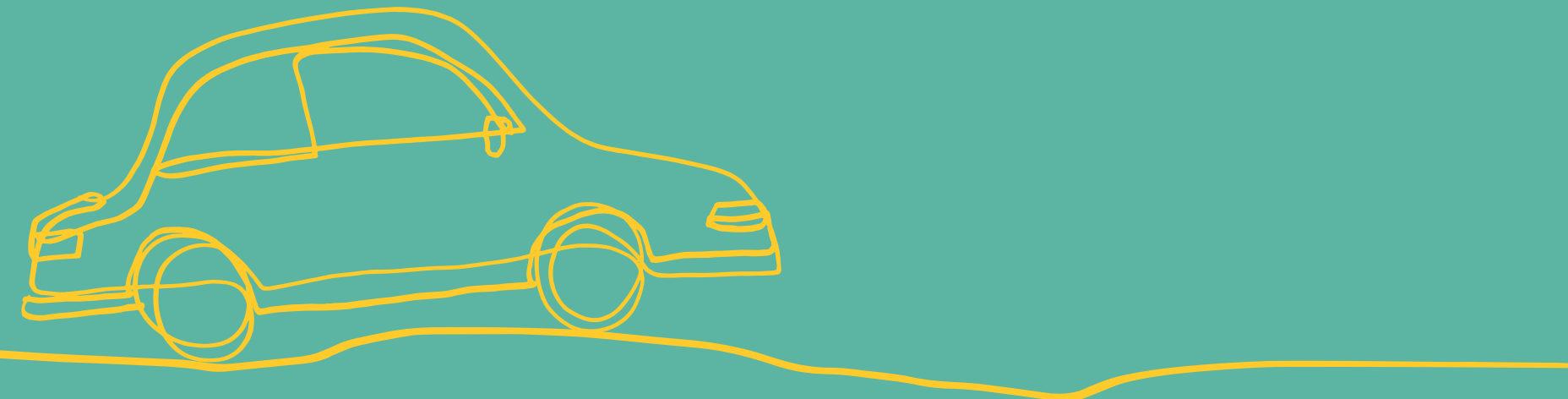
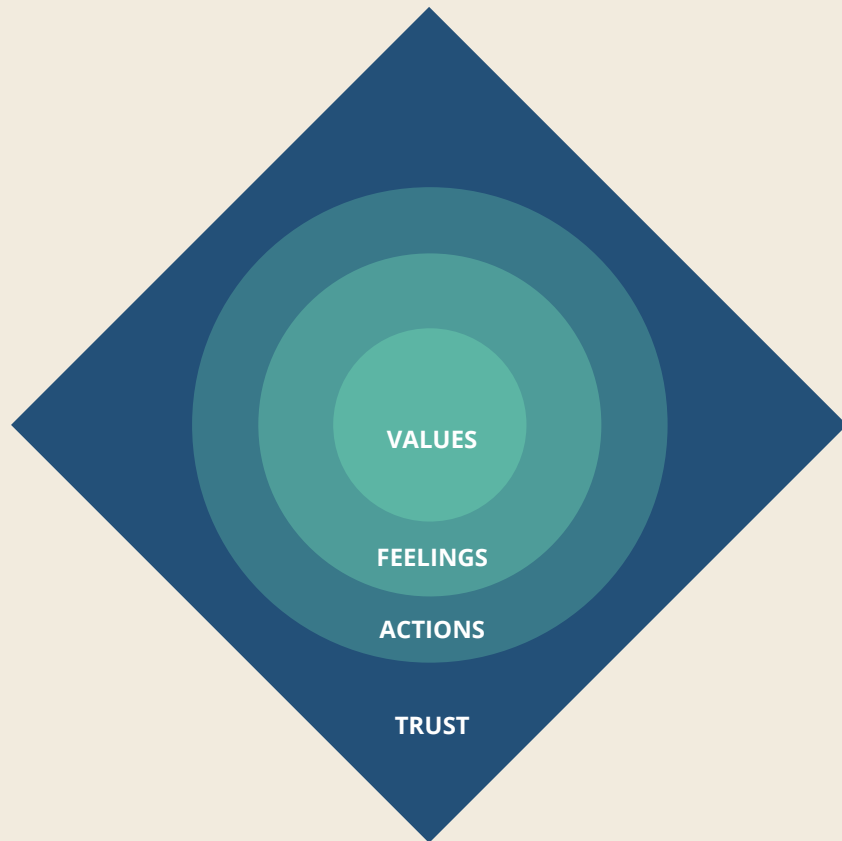


SHIFTING HUMAN VALUES IN UNCERTAIN TIMES



THE HUMAN EXPERIENCE



HOW HUMANS INTERACT WITH ORGANIZATIONS

SO, HOW DO WE STUDY THE HUMAN EXPERIENCE?

To understand the human experience and how it's shifting during these uncertain times, we had to break it down a bit.

We start with human values. Values drive human feelings & actions...they are not what we do, but why we do it.

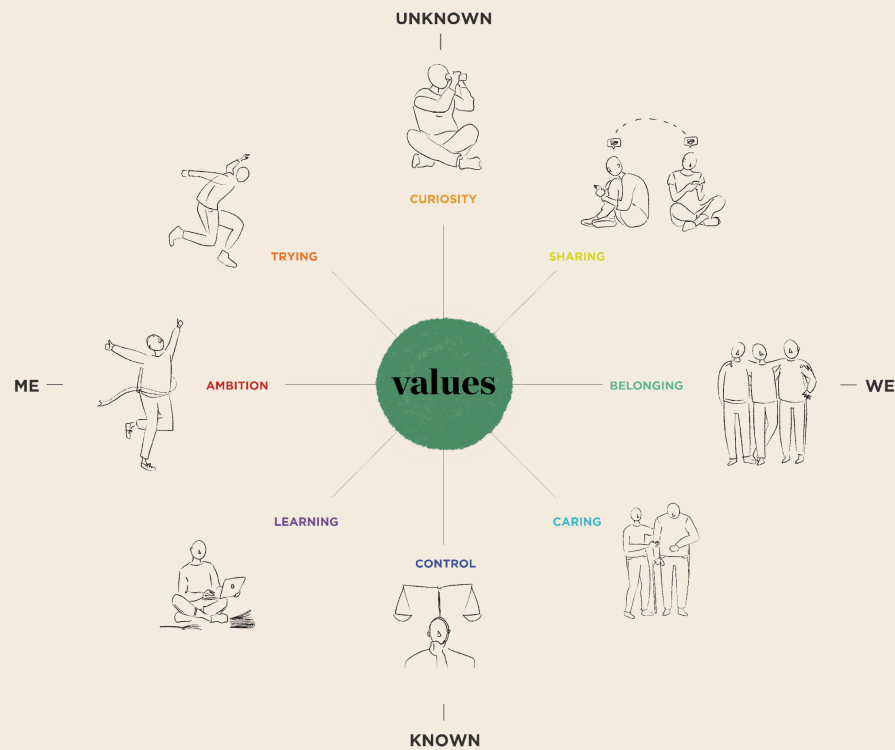
Trust is an essential bond that underpins the relationships organizations have with all their humans (customers, workforce, and partners).

Together, insights from this study will help our clients understand not only how the human experience is shifting, but how they can build trust by meeting the human values that ultimately drive feelings and behavior.

VALUES COMPASS (200K PERSON DATASET)
FOCUS GROUPS (40+ PARTICIPANTS)
CUSTOMER & EMPLOYEE SURVEYS (28K RESPONDENTS)
REMOTE ETHNOGRAPHIES (50+ PARTICIPANTS)

CAN HUMAN VALUES PREDICT THE FUTURE?

(We think they're a good place to start)



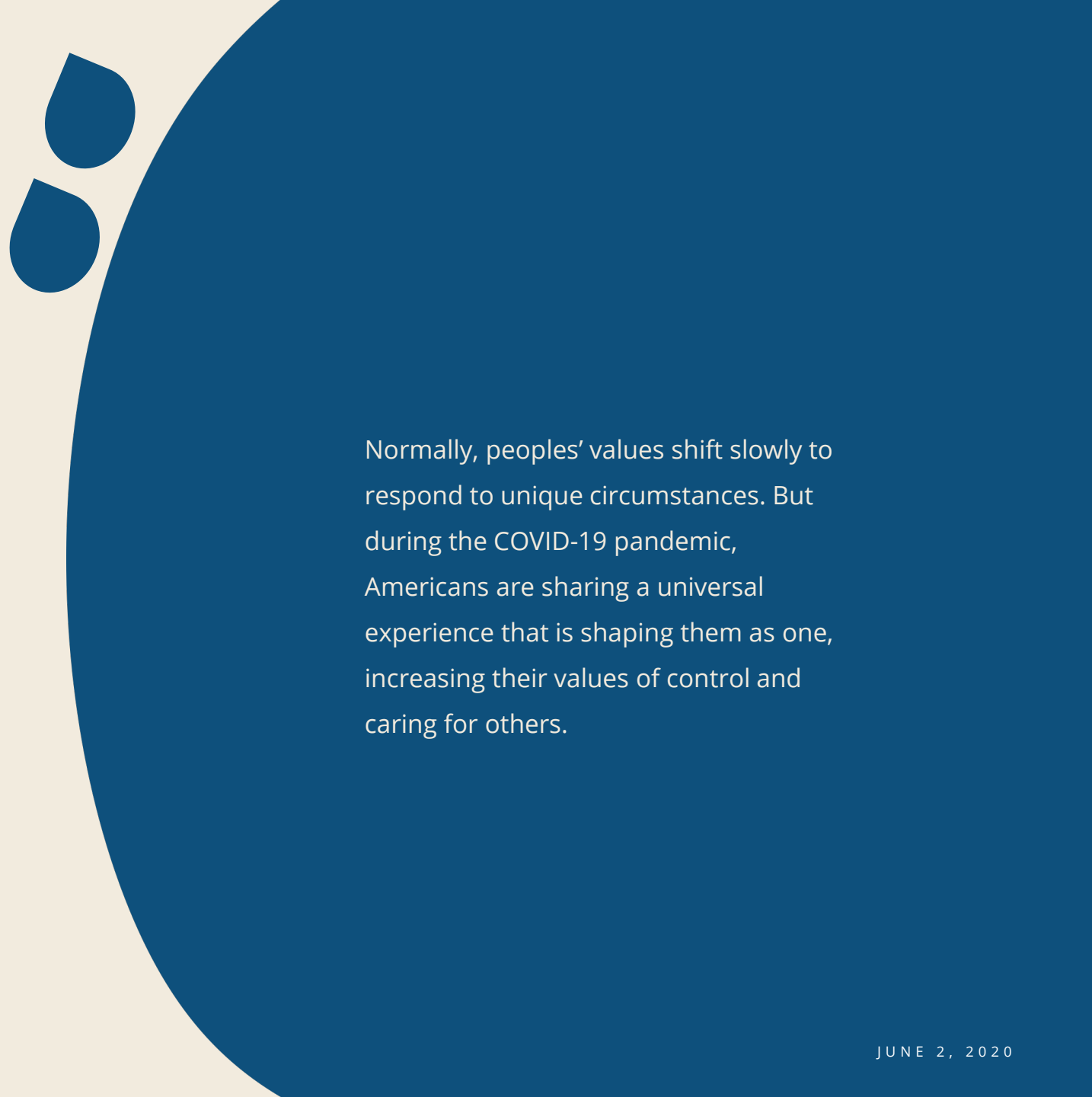
There are countless researchers publishing predictions and projections on how business will fare and succeed in a post-COVID world.

Our research is instead offering a different perspective – the human perspective through our Values Compass.

Over the past weeks, we've been exploring the state of human values, including how values have shifted week-on-week during the COVID-19 pandemic, which cohorts and segments of the population have been most impacted, and why people may not be changing as much as we assume.

DISTANCING IS BRINGING US CLOSER TOGETHER

We are all constantly under forces that shift our values and how we view the world. The COVID-19 pandemic is no different. But surprisingly, values are not changing more rapidly today than they were at this time last year. Instead, they are changing more consistently, and in a similar direction for all Americans.



Normally, peoples' values shift slowly to respond to unique circumstances. But during the COVID-19 pandemic, Americans are sharing a universal experience that is shaping them as one, increasing their values of control and caring for others.

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SO WHAT DOES THIS MEAN?

Understanding these values can help organizations respond, recover, and thrive.

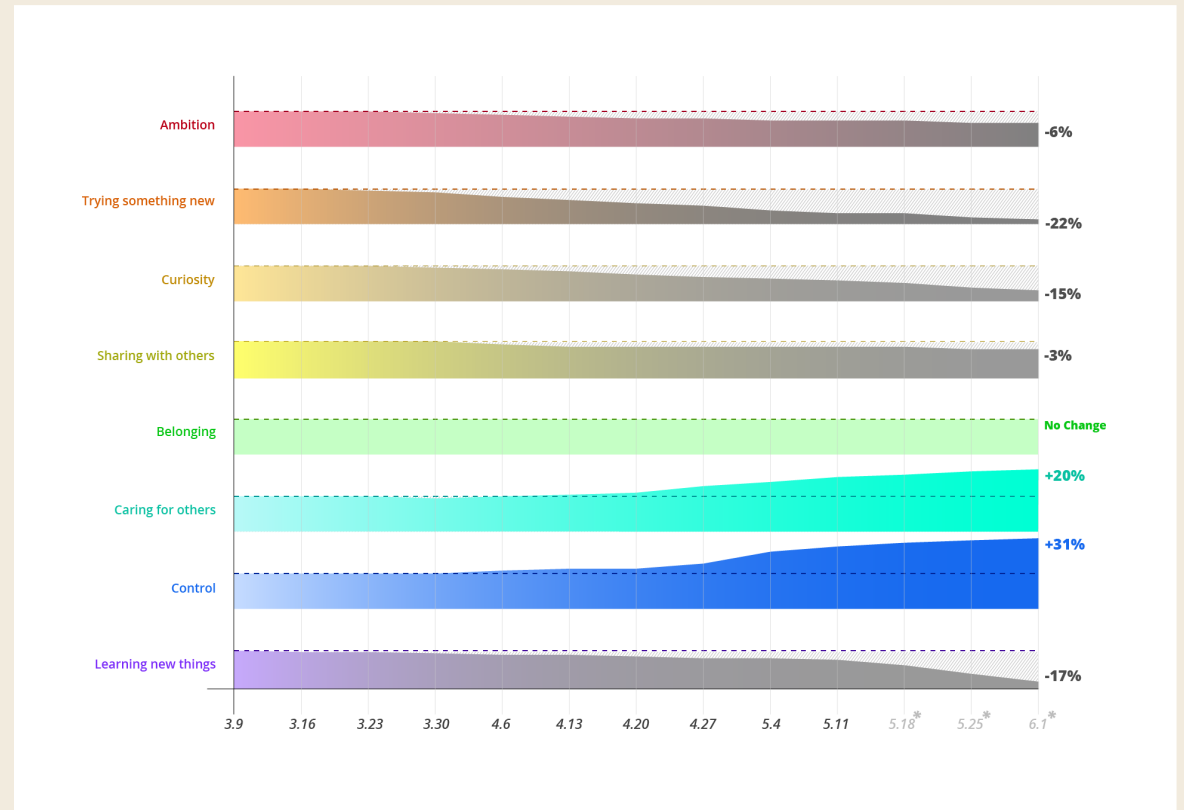
Control: Show me I can trust you.

The data shows that Americans' are simply not satisfied with what an organization promises—they want proof of action.

This means trust & transparency will be a key growth driver in the future. Americans' want clearly communicated decisions, ethical practices, and actions over words.

Care: I want a human connection.

While the pandemic accelerated comfort with digital engagement, it also put pressure on the need for human interaction. How organizations care for and connect with their customers, partners, and workforce in a digitally-enabled, post-COVID world will be central to success.



RECAPTURING HIGH-VALUE CUSTOMERS

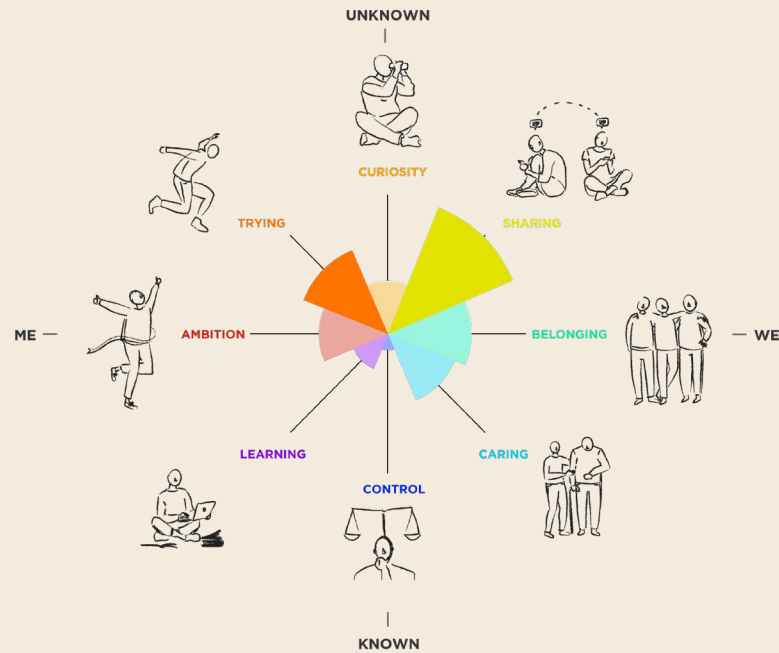
Diving deeper into travel & hospitality, we set out to explore how hotels and airlines can think about enticing the return of their high frequency loyal travelers—both business and leisure.

Building off the notion that values are core to who we are, we looked at the values of this loyal traveler base from June 2019—a snapshot before COVID-19—to capture what matters most to them, assuming these are the loyal customers brands will want to see return.

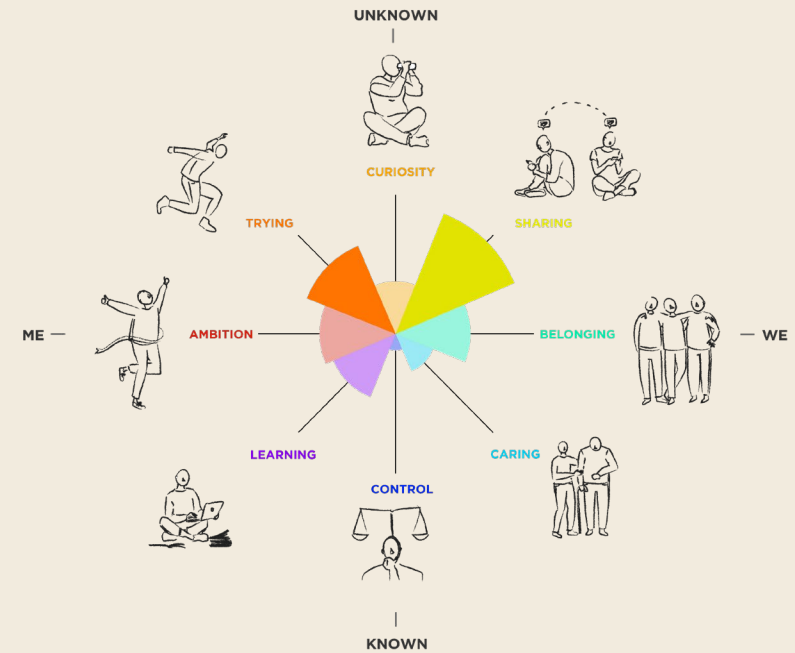


WHAT WE FOUND

Airline Loyalty Members (5+ Trips)



Hotel Loyalty Members (8+ Trips)



These groups are largely comprised of the same people, business and leisure travelers, and have values that mirror each other: the top 2 values are sharing with others and trying new things

WHAT IT MEANS

Rewards programs have the potential to play a significant role in recovering loyalists.

The value of 'sharing with others' makes loyal travelers want to share experiences and connect with the people who aren't with them. In a post-COVID-19 environment, hotels and airlines can surprise and delight their travelers by using digital transformation to offer frequent loyal travelers connection points to their friends and family back home.

The value of 'trying new things' creates an opportunity for hotels to continue doing what boutiques have done well in the past—offer unique experiences that are tied to the local culture.



In addition to “loyalty” travelers we looked at “non-loyal” frequent travelers and found they have the same top values.

Focused reward feature design can play triple duty—

- 1** Bringing loyal customers back quickly
- 2** Enticing frequent travelers to enroll in rewards programs
- 3** Building consistent loyalty by rewarding these customers with perks that meet their values

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WHY DELOITTE?

- Expertise with human experience, specifically for major Travel and Hospitality companies
- Recognized as the leader in CRM Consulting by Gartner
- Pragmatic focus on achieving business results
- Our team is cross-functional, bringing a well-versed set of experts across human experience strategy, culture and change management, and brand and operational excellence practices



THOUGHT STARTERS

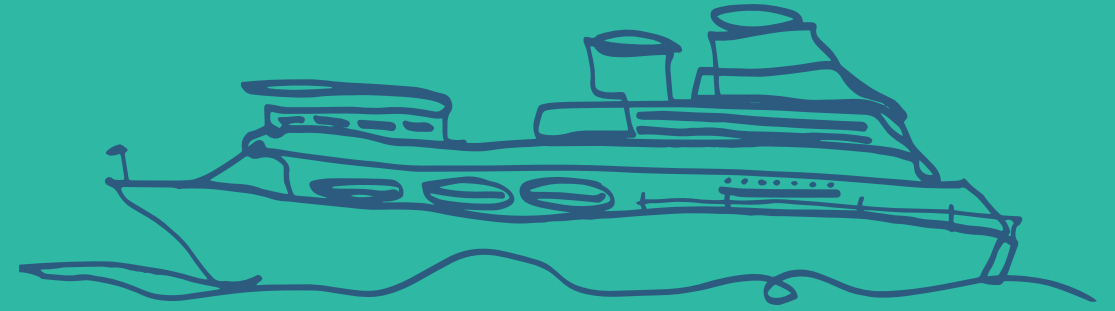
- How deeply do you understand the humans in your ecosystem? Customers, workforce, partners?
- Are you thinking beyond the customer experience to the broader human experience (including workforce + partner)?
- Is human experience is on your roadmap?
- Are you protecting your brand value and mitigating risk through culture transformation?
- Do you need to understand the values of a new partner or acquisition target?
- Are you looking to make your segmentation more actionable and create more effective marketing?

KEY CONTACTS

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THANK YOU