



Navigating Uncertainty: the Protector, the Pragmatist, and the Prevailer

Understanding the Human Experience (HX™)

Perhaps now more than ever, it is critical for organizations to understand the human experience—and the nuances emerging in today’s landscape.

Our multidisciplinary research reveals that Americans fall into one of three distinct patterns of perspectives and behaviors—we call them Clusters.

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

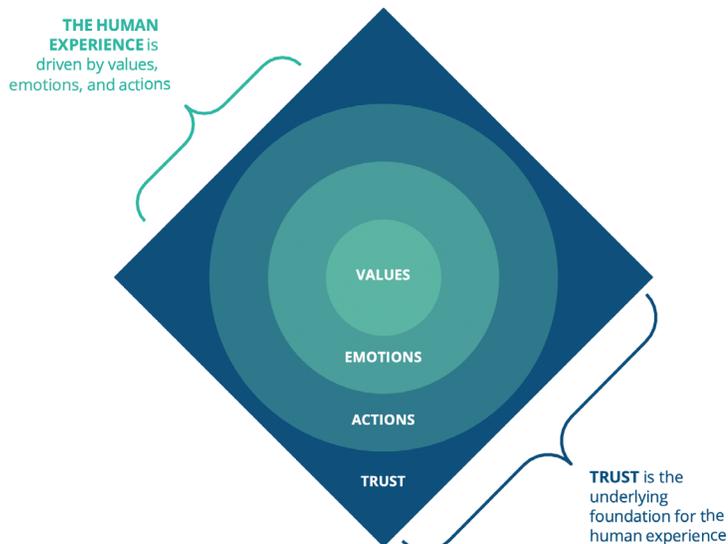
Protectors are feeling anxious, acting with concern; **Pragmatists** are feeling calm and acting with balance; and **Prevailers** are feeling skeptical, acting with confidence.

How did we get to three Clusters?

We started with human values. Values drive human emotions & actions—they are not the things we do, but why we do them. 95% of our purchasing decisions are driven by subconscious urges, the largest of which is emotion.¹

To understand human values, we applied our **HX™ Values Compass**, a proprietary, predictive algorithm that identifies the underlying motivations that matter to humans. Then we listened to what humans are saying about their emotions, through 108 hours of remote ethnographies, which included 3 studies with 53 unique participants. We then layered on emotions and actions from a 16,000 person quantitative study.

Finally, we began to explore our foundation of trust. Trust is an essential bond that underpins the relationships organizations have with all humans in their ecosystem—from customers, to employees, to partners. By understanding how the human experience is shifting across these three Clusters, organizations can take action to build trust and respond, recover, and thrive in the future.



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Interested in the details?

Clusters were defined using a hierarchical clustering analysis of 5 driving attitudinal variables (n=16,000). We identified an optimal number of clusters by evaluating the k-means score of 1-8 clusters.

The final 3 clusters maximized both in-group homogeneity and between-group heterogeneity. Values associated with each cluster are based on the HX Values Compass, a proprietary, predictive algorithm from a dataset updated weekly (n=1,000).

1. "The Subconscious Mind of the Consumer (And How To Reach It)." Interview with Gerard Zaltman, Mandy Mahona. Harvard Business School. 13 January 2003. <https://hbswk.hbs.edu/item/the-subconscious-mind-of-the-consumer-and-how-to-reach-it>

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

DEMOGRAPHIC SKEWS:

30%

Skews Older
(more Baby Boomers)

Skews More Female

Skews Urban/Suburban

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

DEMOGRAPHIC SKEWS:

30%

Skews Younger
(more Millennials/Gen Z)

Skews More Female

Skews Suburban

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

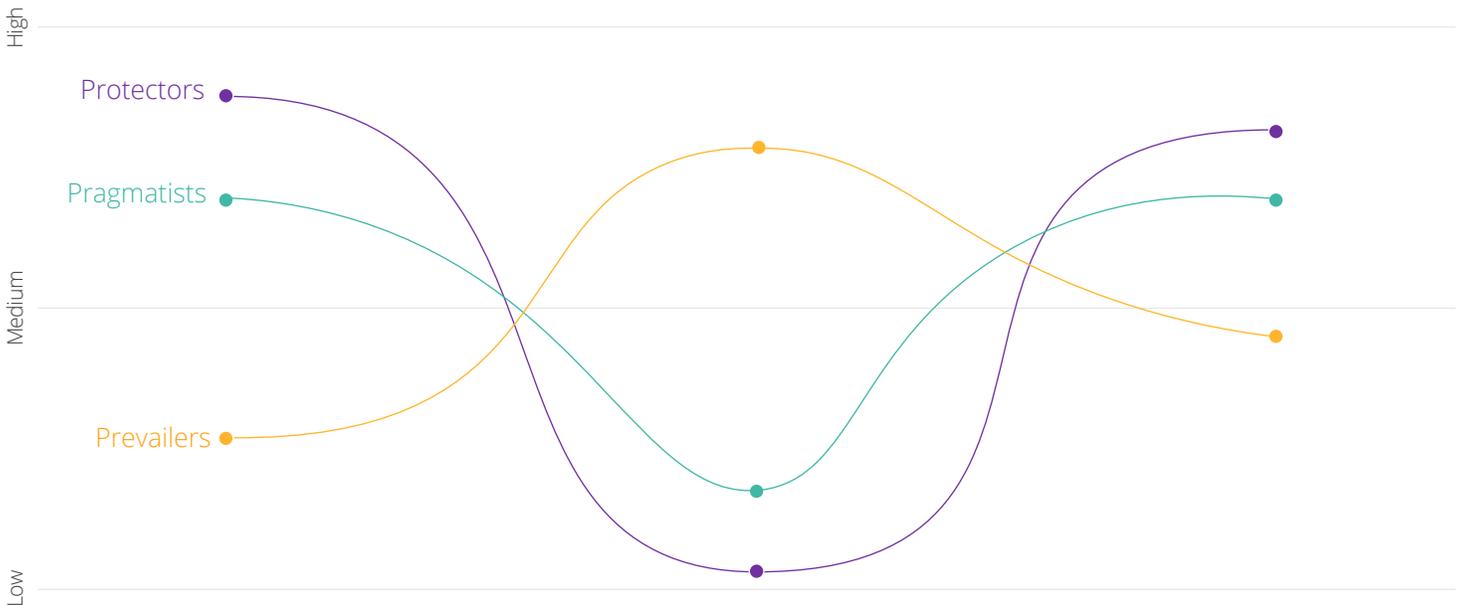
DEMOGRAPHIC SKEWS:

40%

Skews Toward Middle-Age
(more Millennials/Gen X)

Skews More Male

Skews Slightly Rural



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

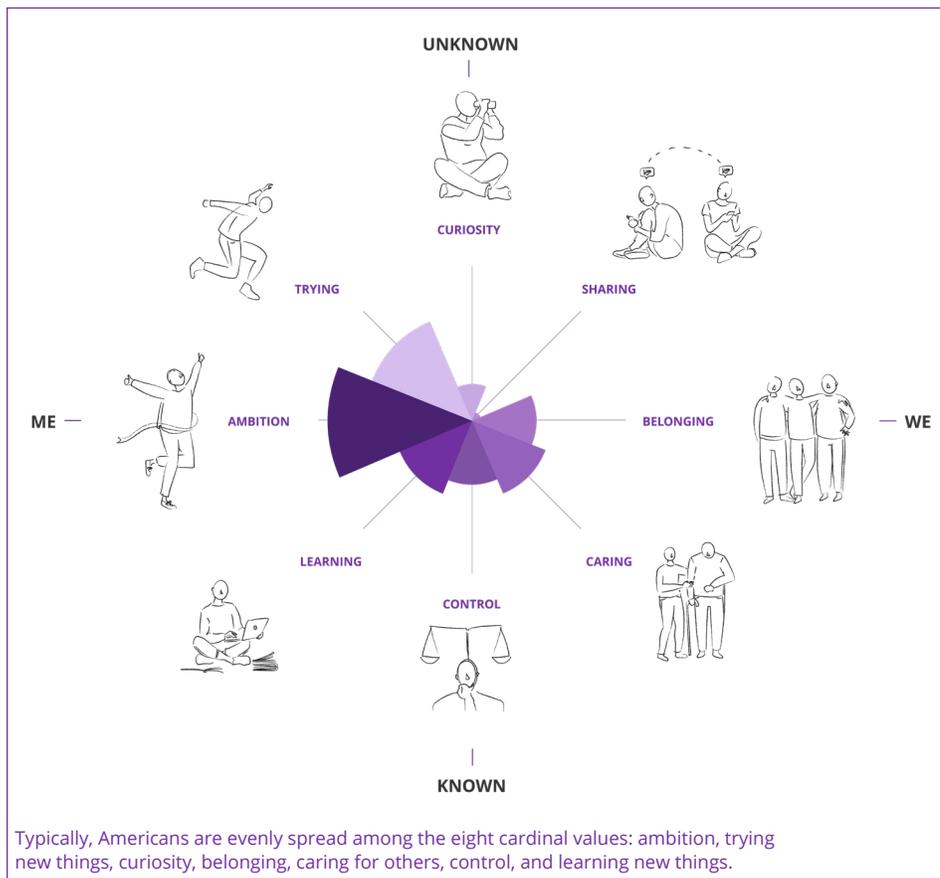
Action before Impact

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

Protectors

Protectors

Feeling anxious, acting with concern



Protectors are feeling anxious about keeping “the community” safe and are not optimistic about our collective path forward. They are sacrificing their routines to aggressively reduce the spread of COVID-19. Despite their resolve to do the right thing, they mistrust others—especially strangers—to do their part too.

Though they prioritize public health, most also care about the economy, wanting to support local business and feel concerned about job security.

TOP VALUES

Ambition

Protectors’ over-index of ambition means they are most likely to trust in themselves over others to do the right thing and believe their actions will make a difference in stopping the spread of the virus.

Trying New Things

Because of this ambition and belief in their ability to make an impact, Protectors are willing to break their routine and learn new patterns of behavior—some of which they will adopt long-term, in order to mitigate risk.

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In addition to their top 2 values, **Protectors shy away from the values of sharing with others and curiosity.** This lower curiosity means they are more risk-averse than the average American and tend to be less motivated to follow behavior and trends modeled by others.

PROTECTORS

Human Stories

Research participants share their unique perspectives and experiences in our ethnographic research

Maizah 40 Years Old | Dallas, TX



“When I see [people] coming down the hallway, I literally put my hand up—‘stop.’ They’re usually not wearing a mask and don’t think this COVID thing is a big issue. I think they think I’m weird.”

Maizah is a homemaker and mother of three children, one of whom has asthma. During the pandemic, she has become extremely protective of her family. **When interacting with strangers, she has been verbally assertive to ensure they maintain social distancing and follow pandemic guidelines.** She and her family have put buying a new house on hold due to COVID-19, and are no longer attending family weddings this summer in California.

Phyllis 56 Years Old | Newark, NJ



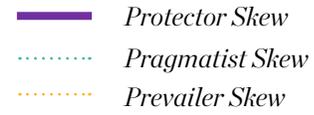
“My challenge has been not catching COVID-19 from the passengers when I am at work. The distancing is hard to do on an aircraft. It has impacted my living situation...[I need to] make sure I am not spreading the virus to my family.”

Phyllis is a flight attendant who has worked throughout the pandemic. **Her greatest challenge has been keeping herself and her family healthy**—taking all precautions to avoid bringing the virus home. Some of her work cleanliness habits have translated to the home; she frequently wipes down surfaces and has a schedule for going to the grocery store and taking walks.

PROTECTORS

Attitudes & Behaviors

The following characteristics define the nuanced differences between the three human Clusters. Representing the Protectors, the purple curve highlights how their thinking and behaviors skew as compared to the Pragmatists and Prevailers.



Health before Economy

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

Health is wealth. 74% say public health is more important than restarting the economy.

Routine before Risk

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

Risk-averse. They are more likely to change routines during COVID, and tend to scoff at early “re-openers.”

Action before Impact

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

Most likely to be taking the personal steps to protect the community at large, beyond their and family.

Likelihood of trusting various sources of information

Government (Local & Federal)

Skeptical of federal, but more trusting of local and state government.

Federal

State/
Local

Healthcare Provider

Trusting of healthcare institutions and providers.

Media

More likely to trust local or national media.

Personal Network (incl. social media)

Less likely to look to friends, family, and social media for information.

Businesses

Do not trust business to define a safe path to normal.

Trusted Sources (for return to normalcy)

Low Medium High



Expectations of Businesses

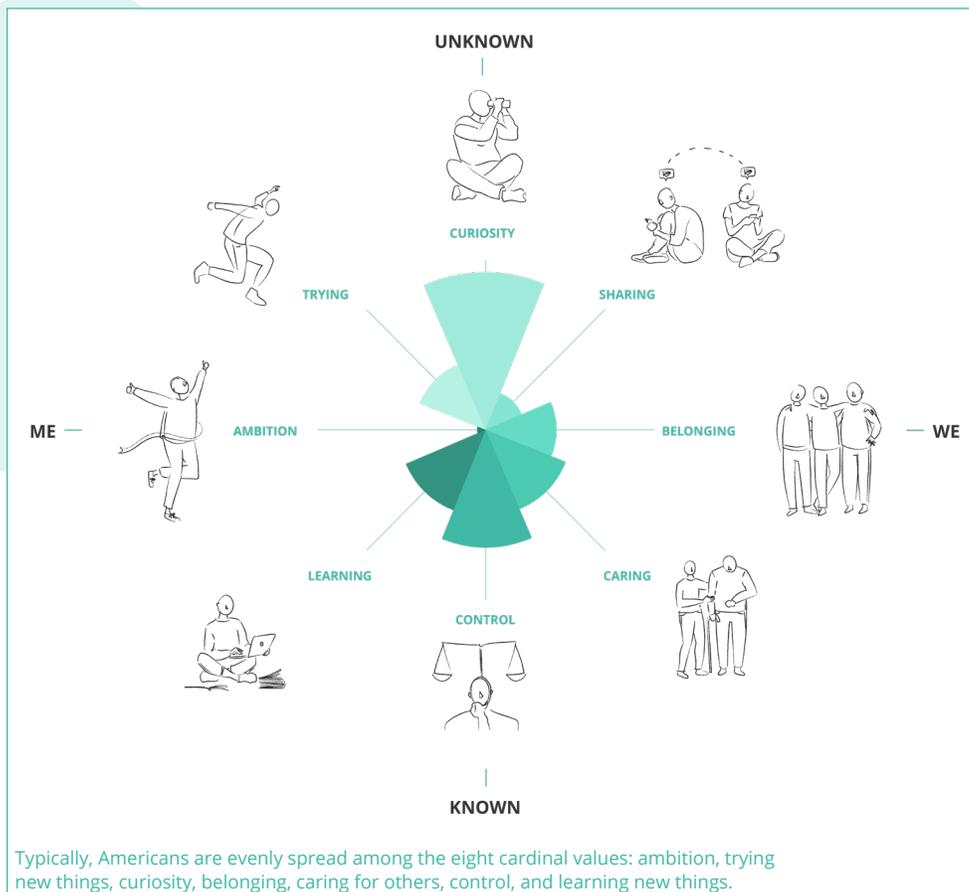
Expectations for businesses to implement safety measures and protocols

Safety measures are “must haves.” Protectors are the most likely overall to embrace safety measures.

Pragmatists

Pragmatists

Feeling calm, acting with balance



TOP VALUES

Curiosity

Pragmatists' over-index of curiosity means they are likely to do well with uncertainty—they are flexible to change and trust in new ideas when coming from reputable sources.

Control

Their curiosity is also tempered with control—while flexible to changes, they enjoy their new routines and are pragmatic in the risks they are willing to take as we “return to normal.”

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In addition to their top 2 values, **Pragmatists shy away from the values of ambition and sharing with others.** This explains their reticence to debate guidelines with social networks, the media, and businesses. Instead, they want to hear from the “experts” what is and is not safe and will listen and act accordingly.

Pragmatists are “taking it in stride” for their families, themselves, and the community—in that order. They balance pride in the sacrifices they’ve made during social distancing with concerns for long term economic and social impact of the pandemic.

They are generally compliant with health guidelines and mandates given by trusted leaders, such as government, doctors, and health institutions—but are skeptical of advice shared by their personal networks, businesses, and the media.

PRAGMATISTS

Human Stories

Research participants share their emotions, perspectives, and experiences in our ethnographic research

Anna 43 Years Old | Collingswood, NJ



“*[I’ve] always generally supported the decision to be under quarantine, but also recognize the longer-term effect as time goes on. People have feelings about economic stability, and recognize why some people would feel that it’s unsustainable.*”

During the last few months, **Anna’s top concerns have been financial stress and the mental health of her children.** She looks to health experts and institutions as a source of truth, and expresses strong distrust in the federal government. **Overall, she is generally accepting of the pandemic situation;** her family has made the most of it by hiking together and learning to cook.

Danielle 36 Years Old | Oak Park, IL



“*I will continue to use virtual alternatives when in-person meetings are not as convenient. This is the new normal.*”

Overall, **Danielle seems to be happy, confident, and doing well during the pandemic.** She is enjoying the newfound free time that she has by learning through Instagram Live classes, getting outside more, and spending more time with her daughter. She is generally accepting about the pandemic situation, and **has found creative ways to spend time with her friends while still following social distancing guidelines.**

PRAGMATISTS

Attitudes & Behaviors

The following characteristics define the nuanced differences between the three human Clusters. Representing the Pragmatists, the green curve highlights how their thinking and behaviors skew as compared to the Protectors and Prevailers.

- ⋯ Protector Skew
- Pragmatist Skew
- ⋯ Prevailer Skew

Health before Economy

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

Health & Wealth. More likely to prioritize public health, but over a third weigh health and the economy equally.

Routine before Risk

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

Ready to get back to their routine. Welcome reopening with mixed feelings and cautious optimism.

Action before Impact

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

See their role in the solution. Feel responsible to do their part to protect the community.

Likelihood of trusting various sources of information

Government (Local & Federal)

Most broadly trusting of government, but prioritizing state and local.

Healthcare Provider

The highest trust of healthcare institutions and their own providers.

Media

Does not trust national or local media for information about reopening.

Personal Network (incl. social media)

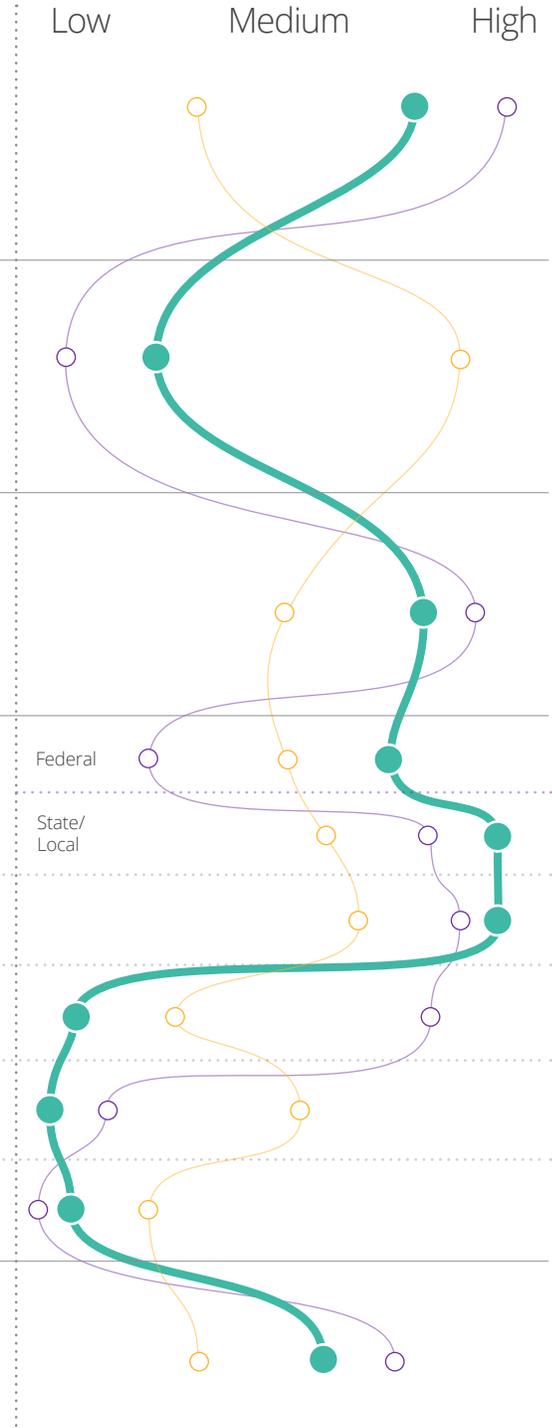
Least trusting of personal network to have valuable information.

Businesses

Does not trust business when it comes to COVID-19 and our path to normal.

Trusted Sources (for return to normalcy)

Low Medium High



Expectations of Businesses

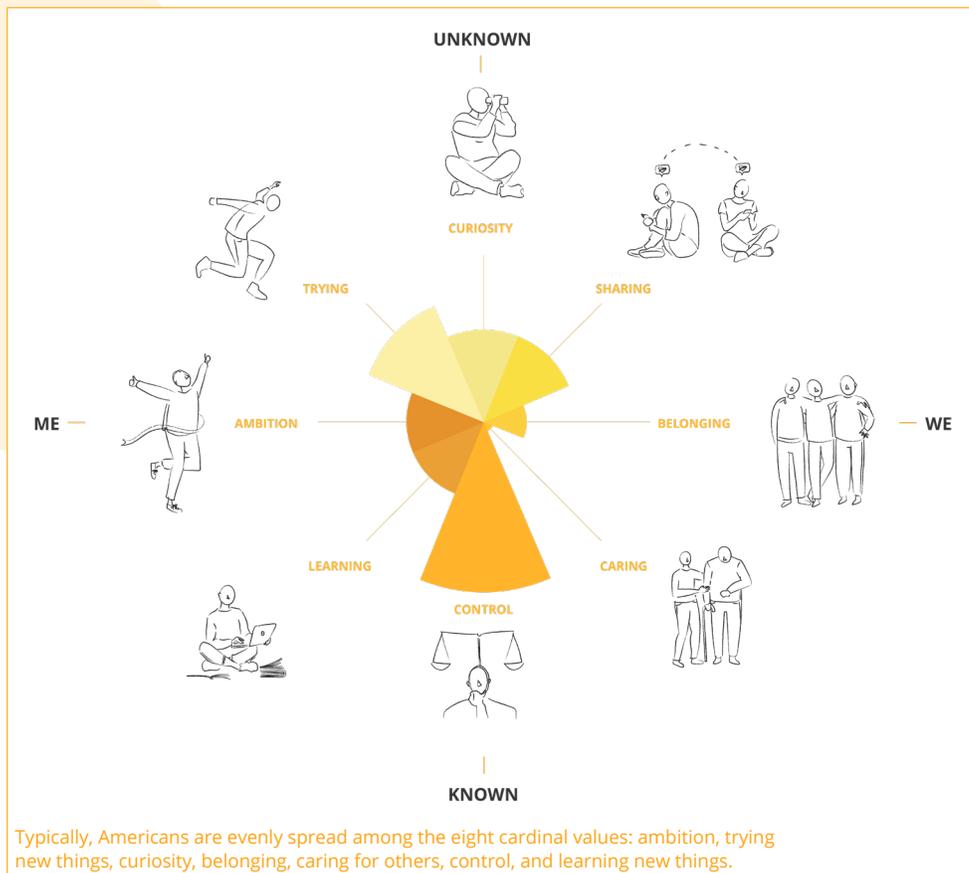
Expectations for businesses to implement safety measures and protocols

Don't consider them mandatory but are more apt to patronize businesses with rigorous standards in place.

Prevailers

Prevailers

Feeling skeptical, acting with confidence



TOP VALUES

Control

Prevailers' over-index of control is driving their feelings of skepticism. They are less likely to feel comfortable with rapid, systemic change and instead see it as an infringement of their personal freedom.

Trying New Things

Conversely though, Prevailers also over-index for trying new things. They are willing to adapt and change behavior, but only if they can see the impact it has on their personal outcomes—versus in service of “blind” safety mandates.

Prevailers are most focused on providing financially for themselves and the ones they love and think getting back to “normal” is key. They are the least likely to deviate from their routine when possible—often still traveling and frequenting restaurants with confidence.

To them, the biggest risk of COVID-19 is economic rather than health-based. They are skeptical of institutions and media motives, instead trusting their families and friends' perspective on the virus and are optimistic about America's ability to overcome.



In addition to their top 2 values, **Prevailers shy away from the values of caring for others and belonging.**

While quite protective of their own, outside of a close-knit community this manifests in their comfort with laissez-faire and desire to let free markets take their course.

PREVAILERS

Human Stories

Research participants share their emotions, perspectives, and experiences in our ethnographic research

Ricky 37 Years Old | Denver, CO



“*People like myself have so much pent-up demand to travel. Everyone’s going stir crazy. That will change back to what it was.*”

Ricky previously worked as an Uber driver, but decided to cut back on hours to protect himself—though he has still continued his second job at a retail store. **He doesn’t feel worried about COVID overall.** Mostly, he is concerned about when theme parks and casinos will be open, so he can enjoy his typical travel activities. **He even traveled to Las Vegas at the end of May on an overnight trip with a friend.**

Michael 43 Years Old | Yardley, PA



“*I’m not too worried about [traveling]. I would get on a plane tomorrow if there was a good enough reason.*”

Prior to COVID, Michael was a frequent business traveler, traveling 1-3 weeks every month. Though he and his household have experienced little financial stress during the pandemic, **one of their challenges has been homeschooling their children.** He and his family plan to keep their road trip plans this summer. **He notes a positive outcome as the “humanization” of people**, and being more exposed to peoples’ personal lives via video calls.

PREVAILERS

Attitudes & Behaviors

The following characteristics define the nuanced differences between the three human Clusters. Representing the Prevailers, the yellow curve highlights how their thinking and behaviors skew as compared to the Protectors and Pragmatists.

- ⋯ *Protector Skew*
- ⋯ *Pragmatist Skew*
- *Prevailer Skew*



Potential Implications for Organizations

Meeting your humans where they are—not where you want them to be

From massive disruption, organizations have the opportunity to reflect and reimagine what the future holds based on a **new order of priorities**.

To help do so successfully, they should recognize the human nuances of each Cluster, respect where each is coming from, and **meet them where they are**.

As society begins to reopen, how is each Cluster likely thinking and feeling?

Protectors

Still anxious of COVID-19, Protectors are disturbed by how others seem to have “moved on.” While they may now feel compelled to return to work, or do essential errands in person, they are critical of any business they view as reopening too early—even if officials say it’s okay to do so. Protectors may be sensitive to others denying their reality, and continue to distrust that others are holding up their end of the public health contract—even experiencing the presence of co-workers or other customers as a threat.

Pragmatists

Although skeptical that reopening is the right move, Pragmatists won’t refuse to return to work or hold out against in-person experiences. As time passes, they may become more comfortable back in the office or traveling—however, after months of dutifully keeping distance from others, Pragmatists may experience dissonance at being back in physical spaces.

Their curiosity, paired with high levels of trust in healthcare institutions and state/local government will make them somewhat open-minded about reopening while upholding public health.

Prevailers

Ready to reopen! Prevailers may even feel vindicated that businesses and society seem to now be seeing COVID-19 tradeoffs through their eyes, accepting that we must be comfortable taking on some level of risk in order to sustain our economy—and also our way of life. Prevailers are happy to be reunited with friends and coworkers, excited to travel again, and receive creative stimulus from a reopening world.

Guiding questions

Leaders should understand where their customers and employees fall on this spectrum. Many businesses have existing data to begin approximating where their humans fall; or can source additional data points to gain a more clear picture. However, even without this insight, remaining mindful of the needs of each cluster will lead to “no regret” moves that improve the overall human experience.

Guiding Question	No-Regret Moves	Supporting Data
<p>How might organizations build trust with employees and partners, recognizing the nuanced values and attitudes of each Cluster?</p>	<p>Lead with empathetic messages—both internal and external—recognizing a variety of human experiences during COVID and different viewpoints on how and when businesses should reopen.</p> <p>Prioritize the safety and well-being of employees first, with expectations that all workers will respect new procedures as a way of respecting each other and enabling reopening for customers.</p> <p>Provide resources to demonstrate authentic care for employees—such as leadership pulse checks, support groups, and mental health hotline or forums.</p>	<p>29% of Pragmatist healthcare workers don’t feel they can voice their concerns and that they will be heard and acted upon; 27% of Prevailers have a fear of retaliation.</p> <p>51% of Protectors have felt anxious, and 30% have felt hopeless—followed by Pragmatists and then Prevailers.</p> <p>Even as we remain physically distant, 61% of humans would be open to using virtual tools for mental health.</p>
<p>How might organizations enable humans with different concerns and needs to find a path of engagement that feels safe across Clusters?</p>	<p>Consider redesigning physical spaces for social distancing, or creating a reservation system for being in the space.</p> <p>Create flexibility with curbside/in-store pickup (from online orders) for those who are still anxious to come inside.</p> <p>Even in physical locations, be digital first. Use digital tools to help avoid touching shared objects, such as app payments in store in place of using a credit card reader.</p> <p>Seek external verification of cleanliness, such as a certificate from a government agency or global third party.</p>	<p>79% of Protectors and 75% Pragmatists want hotels to have innovatively redesigned common spaces or sign-up schedules for better social distancing</p> <p>71% of Protectors don’t trust others to properly distance</p> <p>75% of Pragmatists are concerned about contact with shared objects</p> <p>Over half of Protectors report being likely to use curbside during COVID</p> <p>Over 80% of Pragmatists and Protectors would prefer a safety/cleanliness certification prior to air travel</p> <p>A fully contactless digital experience is only a deterrent for 9% of Prevailers—for the remaining 91%, it is preferred or will have no impact</p>

Question

No-Regret Moves

Supporting Data

How might COVID catalyze organizations towards better use of digital in serving humans—providing not just convenience and cost savings, but also safety?

Move services online, invest in the digital experience, and provide human sources of support to make the virtual experience feel more human—such as a concierge-like relationship to take the customer through their entire decision-making and purchasing process.

Integrate digital platforms into the physical experience—such as product information to minimize interaction with sales associates or augmented reality to test apparel and beauty projects.

Accelerate modernization and digital innovation efforts in contactless channels, such as call centers and digital services.

90% of Protectors prefer all government services to be easily accessed online; **63%** of Protectors prefer to do their banking online

69% of Pragmatists want a dedicated salesperson to assist with vehicle selection when purchasing a vehicle online

59% of Prevailers want their virtual experiences to feel more human, and 51% want their virtual experiences to feel more personalized

How might organizations craft communications that build connection with humans across all Clusters, and avoid alienating any particular group?

Strike a balance in messaging between acknowledging continued challenge of fighting the COVID virus and the economic hardships of the shutdown, in order to avoid alienating either Protectors or Prevailers.

Meanwhile, when discussing COVID, highlight new safety procedures, emphasizing that these were made in consultation with medical experts.

Target new customers by investing in secure customer insight and analytics platforms to keep a pulse on ever-changing customer expectations and deliver personalized marketing.

83% of Pragmatists prefer to see how sanitizing and janitorial procedures have been enhanced in government offices

90% of Pragmatists look to health institutions as a trusted leader in reopening information

41% of Prevailers—on average across 23 potential safety measures—feel neutral about potential precautions

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