



**2021 Global Marketing Trends**  
A Canadian perspective

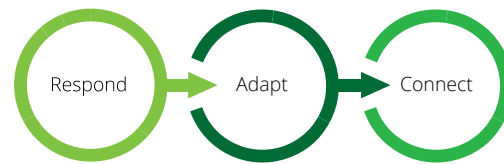
# Marketing amid uncertainty

How Canadian marketing executives can use Deloitte's 2021 Global Marketing Trends to manage uncertainty more effectively

## Introduction

DELOITTE'S 2021 GLOBAL MARKETING TRENDS REPORT aims to help marketing executives find ways to navigate a new reality, one turned on its head this year by a pandemic and a reckoning of systemic racism. It aspires to help marketing leaders address uncertainty and strengthen the connection between brands and their stakeholders. This perspective offers a nuanced context of the seven global trends and provides a framework for how they can be prioritized and applied within Canadian businesses.

Derived from our experiences working with Canadian marketing executives across a wide range of industries, we've synthesized the global marketing trends into a framework that can be used to prioritize those that will have the most impact for Canadian organizations in the coming year. The framework will support marketing leaders in managing uncertainty, specifically in their ongoing response to the COVID-19 crisis.



The framework consists of three phases, into which the seven trends are organized:

- **Respond:** Trends that address how marketers need to pivot to address changing business landscapes and consumer needs
- **Adapt:** Trends that address how marketers understand and meet new consumer expectations efficiently
- **Connect:** Trends that address how marketers think about differentiating themselves to fundamentally deepen relationships with their stakeholders

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## Respond

Half a year into a global pandemic, we're realizing that the greatest challenge was not the initial reaction to it. Since the start of the pandemic, we have seen many clients and organizations in Canada successfully stand up crisis-response

teams to manage the needs of their customers, employees, and partners, and settle into a new business-as-usual with some normalcy to ongoing operations.

The greatest challenge Canadian businesses are facing now is how well they will respond amid ongoing uncertainty. There is uncertainty over the second coronavirus wave, if and when a vaccine will be approved, and how all of this will affect consumer behaviour in the short, medium, and long term.

A Deloitte survey in August 2020 highlighted that 37 percent of Canadians will purchase more from brands that have responded well to the crisis.<sup>1</sup> Therefore, there is an opportunity for Canadian businesses to enable themselves to pivot quickly and respond to change. Among the global

### EXPORT DEVELOPMENT CANADA (EDC)

#### CREATING AN AGILE ORGANIZATION

To increase its relevancy in the export sector and meet changing customer expectations, Export Development Canada (EDC) needed to increase its brand awareness and develop new digital knowledge products. It decided to adopt an enterprise-wide agile transformation, reboot digital channels, and update brand positioning.

*Agility* was a top-down effort. The organization's leadership invested in creating an agile culture to cultivate collaboration, empower talent to make quick decisions, and instill a customer-first mindset. To achieve this, EDC refined the structure of its operations and strategically replaced process formalities with flexibilities. Its new structure promoted nimbleness among teams, which improved the organization's ability to respond to change.

The transformation started with its digital delivery and marketing teams, where agile pods were stood up and empowered to make faster and more autonomous decisions. The culture created through agility encouraged teams to use customer insights to make decisions, and the nimble new structure enabled these decisions to be made more quickly. The result is that EDC augmented its penetration of the small and medium-sized business (SMB) segment by 15 percent and increased awareness of EDC by 25 percent. Additionally, digital products were delivered faster and new synergies were created through greater collaboration with their suppliers and partners.

EDC's success with agile was noticed throughout the organization, and leadership established a centre of excellence to set the standard of how agility should be applied to elevate the entire organization. Through this initiative, EDC expanded its agile operating structure to include traditionally rigid functions, such as risk, governance, and finance. The organization continues to use its centre of excellence to find new ways to elevate the organization through agility.

marketing trends, three address a business's ability to respond: agility, talent, and trust.

*Agility* is a broad term that refers to adaptive models that can enable businesses to keep up with culture, conversation, and digitalization. The pandemic has forced many organizations to pivot to an agile digital channel strategy that meets customer needs, but agility can go deeper: it can be built into the foundation of an organization's structure.

We analyzed how Canadian banks stabilized their operations in response to COVID-19 and found that keys to success included decreasing process formalities in favour of increasing speed and adopting new collaboration technologies.<sup>2</sup> We also found that despite the dramatic operational shifts, execution excellence was upheld—busting the myth that agility creates chaos.

Regardless of how agility is embodied at an organization, Canadian marketers should be focusing on leveraging data, investing in relevant digital tools, and designing an organizational roadmap to make agility a reality. Agility can provide the confidence needed to respond to uncertainty and continue to thrive in 2021.

*Talent* has become a vital part of managing uncertainty. Organizations need to support and enable their talent to pivot and execute efficiently. For example, Chief Marketing Officers (CMOs) can support employees by using artificial intelligence to automate workstreams, bringing capabilities in-house that provide a competitive advantage, and investing in culture so that people can move quickly and adapt to changing customer needs. CMOs can also enable their talent to make better marketing decisions by leveraging data and investing in digital technologies that augment capabilities.

We're now seeing how Canadian businesses are remodelling structures to empower their talent to make decisions. Many organizations have

historically had complex decision-making hierarchies and an obsession over data before any decision could be made. The pandemic has forced new behaviours, and leaders are coming to understand the necessity of delegating decision-making authority and prioritizing action over waiting for more information. The result has been that businesses are accomplishing more in less time, and these new structures have enabled them to respond quickly to constantly changing customer needs.

*Trust* enables organizations to respond—and an organizations' response to change can deepen trust. Even if your organization has implemented agile principles and restructured decision-making hierarchies, there's a risk that your stakeholders (customers, talent, and partners) won't accept the change unless they trust your organization.

Deloitte conducted an online survey of Canadian consumers to understand their perceptions of the trustworthiness of various industries and their views on what factors are important in building trust in an organization. More than 1,000 Canadians responded. We found that 85 percent are very or fairly likely to sever an existing relationship with an organization if it does something that negatively impacts trust.<sup>3</sup>

As with any crisis, COVID-19 put a spotlight on the relationship between brand and trust. A brand's reputation is determined by the connection between what is promised (messaging and advertising) and what is delivered (experiences). Brands that earn and maintain trust by delivering against what is promised will be the ones that will come out of this crisis stronger and with greater customer and workforce loyalty. In fact, 26 percent of Canadians already report using a new brand because of how it responded to the COVID-19 crisis.<sup>4</sup>

To build trust, Canadian brands need to align competence with intent, ensuring that their actions reflect their stated intentions and that they are

promoting transparency at all levels of the organization. We are seeing the emergence of four human dimensions of trust—physical, emotional, financial and digital—

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that are critical for any organization to build and strengthen trust.<sup>5</sup> Not every dimension will be equally important, but all should be considered as organizations shift to more digitally enabled business models.



## Adapt

Competitive marketing organizations, as they respond to change, will need creative ways to adapt their operations to meet consumers' evolving expectations.

The political, social, and health crises of 2020 have been a catalyst for accelerated change in Canadian consumer behaviour. For example, according to our August 2020 survey, only about half of Canadian consumers said they feel safe visiting a store, 61 percent plan to limit their use of public transit, and 39 percent are delaying large purchases.<sup>1</sup> Now is the time for Canadian marketing teams to adapt to these attitude changes and provide new forms of value. Two of the seven global marketing trends concern this need to adapt: participation and fusion.

For brands, *participation* is a currency. It's a means of exchanging value between brand and consumer, and CMOs can define what this value will be for their organization. In Canada, consumers are more likely than those in the United States, United Kingdom, and Australia to view ratings and reviews online before purchasing a product or service, and 70 percent say that they trust this source of information.<sup>6</sup> Ratings and reviews, a form of participation, communicate valuable information, but dialogue may be even more valuable. Conversations are an exchange of thoughts and ideas, and this often is where true value is extracted. Through dialogue, brands and consumers can participate in each other's evolving needs and changing expectations. A strategy that embraces dialogue will give marketing leaders iterative insight into new ways of providing consumers with greater value over time.



*Fusion* is an approach to creating new value for companies and consumers alike. Through the insights gathered from consumer participation, as well as a robust marketing technology stack, CMOs can seek to fuse new value streams onto their existing business model. This might include converting costs into investments in an expanded product offering, harnessing new strategic partnerships, or entering a new industry. To maximize return, expansion through fusion needs to be grounded in insight, and elevated by digital, with the goal of creating new value for consumers' evolved expectations.

## Connect

Once an organization is able to adapt to meet consumer needs, they can turn their focus on how to connect with stakeholders. An authentic connection with stakeholders can create differentiation and promote loyalty.



The global marketing trends show that CMOs are seeing a significant drop in confidence in their ability to influence their C-Suite peers and make a strategic impact. As a result, basic instincts may kick in and CMOs may prioritize survival over human connection—even as human-centric initiatives such as strengthening customer engagement, retaining talent, and making an impact on society are more important than ever.

Canadians are feeling isolated and are seeking meaningful connections. For example, 67 percent of Canadians would like to experience more meaningful social interactions in their daily life.<sup>7</sup> This shows there's an opportunity right now for marketers to connect with Canadian consumers and present them with a human-centered approach. There are two trends relevant to how marketers can connect with stakeholders: purpose and human experience.

More than ever, demonstrating your brand purpose is vital in every touchpoint with your stakeholders. Consumers are paying attention to how companies are responding, and purpose-based companies that show empathy will likely emerge as the leaders. For example, as of August 2020, 36 percent of Canadians report that they plan to buy more locally sourced goods going forward even if they cost a little more.<sup>1</sup>

For marketers, there is an opportunity right now to *connect* with Canadian consumers and present them with a human-centred approach.

**INDEED**

## HIRING VIRTUALLY IN THE AGE OF COVID-19

Indeed, the number-one job site, in Canada and the world, has been helping people get jobs for the past 16 years. The company's goal is to provide job seekers with access to job opportunities, while enabling employers to engage with a diverse pool of talent. During COVID-19, Indeed recognized that hiring needs were changing: job seekers had limited access to networking and interviewing opportunities, while employers lacked the structure to screen and connect with candidates through virtual means. With rising unemployment rates and communities navigating crisis-related restrictions, Indeed rapidly pivoted priorities to help both job seekers and employers navigate remote hiring.

To solve these emerging stakeholder needs, Indeed adapted a solution it had been developing before the pandemic called Indeed Hiring Events. The platform enables employers to create and promote company-sponsored virtual hiring events and host open interviews for roles, connect directly with candidates, and set objective screening criteria, as well as automatically schedule interviews with candidates whose skills meet their criteria. This approach to hiring is more inclusive and leaves no room for unconscious bias.

Indeed used the principles of fusion to create an innovative experience that provided new value for its stakeholders. The company used digital tools to elevate its connection with customers, and introduced a new stream into its existing business model.

By the fall of 2020, employers had used the Indeed solution to host more than 3,700 virtual hiring events globally and more than 400 in Canada. This demonstrates the company's successful use of fusion to reimagine the job search process while addressing stakeholder needs to have authentic virtual connections. Indeed's push to innovate digitally during COVID-19 has challenged the boundaries of expected behaviours in the industry and created a new virtual status quo.

Organizations that know why they exist and who they're built to serve are uniquely positioned to navigate unprecedented change. This crisis has refocused Canadians' attention to human connection and community. Canadians care about their families, friends, neighbours, and cities, and they also care about people in other countries, the environment, and global health. Brands can practice stakeholder capitalism and connect with consumers by demonstrating authenticity, empathy, and a commitment to both stakeholders and communities.

At its core, connecting with customers relates to providing a *human experience* that satisfies expectations and addresses needs beyond just the purchase journey. As of August 2020, 61 percent of Canadians are still concerned about the health of their family, and only 52 percent feel safe engaging

in person-to-person service.<sup>1</sup> Marketing leaders must consider realities such as these as they look to reshape the experiences customers have with their brand in the coming months and years.

To deepen relationships with people, it is important that brands have the digital tools required to uncover and understand what people value and then address how those values influence behaviour beyond just their interactions with a product or service. Demonstrated by Canadians' current safety concerns, a person is not defined by their experience with your brand, they're defined by a unique set of interests, desires, and needs. Successful brands will activate human experiences by leveraging data and using customer insights in pursuit of unlocking truly personalized interactions that consider the full depth of their customers.

## **BRITISH COLUMBIA LOTTERY CORPORATION (BCLC)**

### CONNECTING THROUGH A SOCIAL PURPOSE

For the past six months, the British Columbia Lottery Corporation (BCLC) has focused on defining a purpose to propel the business, drive value for communities, ensure player health, and foster positive employee experiences. By understanding its stakeholders well, BCLC was able to identify that social purpose is core to its business and the foundation of its existence. Purpose is becoming both integral and complimentary to BCLC's business and financial goals, and a key business driver.

"A social purpose is, in fact, additive [to corporate financial goals]—customers are increasingly seeking out value-driven companies working to address important societal issues," says Peter ter Weeme, BCLC's chief social purpose officer and vice-president of player experience. He highlights the importance of values in recruiting, engaging, and retaining employees, which makes social purpose critical to the organization's go-forward business strategy, player experience, employee experience, procurement, and more.

BCLC, which benefitted from board and executive-level support to focus on defining a purpose, established a robust method to define the social purpose, build buy-in, and execute social purpose goals. Key steps included creating a social purpose primer to define and highlight possible purpose territories, training social purpose ambassadors, conducting public opinion and employee research, and convening various employee and stakeholder workshops.

"BCLC is now developing a comprehensive implementation plan that will ensure our social purpose will permeate all aspects of the organization and its operations," Peter says. The organization uses a comprehensive implementation plan that permeates throughout it: brand values and gaming developments are tested and aligned with the social purpose.

While the organization is in the early days of the social purpose journey, there's already been an impact. BCLC is seeing more internal alignment in strategies and financial commitments, improved employee engagement, and cohesion in the messages communicated to customers. Stakeholder relationships have deepened through the purpose development process and attracted the attention of values-aligned vendors.

## Closing

It's still not clear how the political, social, and health crises of 2020 will affect Canadian consumers in the long term. Regardless, Canadian CMOs must enable their brands to swiftly respond to change by acting with agility, optimizing their approach to talent, and building trust. They should also find ways to effectively adapt to evolving expectations by focusing on participation and fusion, and *connect* with stakeholders through purpose and human experience.

Canadian leaders who can use these trends as tools to effect meaningful change and handle uncertainty deftly, will be those who position their organizations for post-pandemic success.

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*Read the full 2021 Global Marketing Trends Report for more.*



## Endnotes

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