



2021 Global Marketing Trends

Find your focus

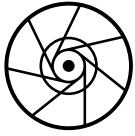
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Digital technology has changed the face of business. Across the globe, Deloitte Digital helps clients see what's possible, identify what's valuable, and deliver on it by combining creative and digital capabilities with advertising agency prowess and the technical experience, deep business strategy, and relationships of the world's largest consultancy. Deloitte Digital empowers businesses with the insights, platforms, and behaviors needed to continuously and rapidly evolve to perform beyond expectations. [Read more about Deloitte Digital's world-class digital agency and its service offerings.](#)

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Introduction

2021 Global Marketing Trends: Find your focus

THROUGHOUT HISTORY, MOMENTS of crisis and uncertainty have galvanized new innovations and shifted views on what matters most to people. The 1918 pandemic popularized the use of the telephone so much that the people-powered switch operators couldn't keep up.¹ In the Cold War era, the rise of televisions in households directly influenced how people perceived conflict at a time when the Vietnam War became the world's "First Televised War."² And, more recently, as issues of climate change and gender equality took centerstage, people began to demand more from businesses.³

Now, we are confronted with an amalgamation of uncertainty—and the world is collectively looking for answers. With an omnipresent pandemic, we had to find new ways to socialize in a world where social distancing quickly became the norm; work had to be redesigned so people could do their jobs

safely and productively; grocery shopping, dining out, education, and medical treatment fundamentally changed. And, almost in parallel, as a reckoning of systemic racism came to a head, we were forced to reassess and reflect on our values and what it means to be human.

From people and businesses to governments, everyone needed to find new ways to navigate this new world—and this trends report was no different. How do you uncover and discuss the implications of global marketing trends at a time when the world has seemingly turned on its axis and still continues to change in unpredictable ways?

To seek an answer to this question, we set out on an all-encompassing journey to better understand how people and brands responded to the pandemic—and, most importantly, why some brands were able to flourish even during these

THE 2021 GLOBAL MARKETING TRENDS STUDY

As our world went through rapid changes, we recognized a need to dig deeper into the evolving milieu to better understand how consumers and executives are responding to their new environments. With this in mind, we conducted two surveys to inform each of the 2021 Global Marketing Trends chapters.

The Global Marketing Trends Consumer Pulse Survey polled 2,447 global consumers, ages 18 and above, in April 2020. This survey was launched in the United States, the United Kingdom, Mexico, China, South Africa, Qatar, the United Arab Emirates, and the Kingdom of Saudi Arabia.

The Global Marketing Trends C-suite Survey polled 405 US C-suite executives from global companies in May 2020. This survey asked CMOs, CFOs, COOs, and CHROs their thoughts on a variety of topics related to their response to COVID-19.

turbulent times. In our second annual report, we combine subject matter expertise, voices from the field, and two overarching surveys—one consumer-based and the other targeted toward executives—to separate the signals from the noise of change (see the sidebar, “The 2021 Global Marketing Trends study” to learn more).

Even among executives, our research found they’re feeling the pressure of an uncertain future. For instance, 18 months ago, we polled executives on their ability to influence their peers and make a strategic impact.⁴ When we asked 405 executives the same questions in May of 2020, we saw C-suite confidence has plummeted across the board (figure 1).

As often is the case when we are unsure of how to respond, our most basic instincts kick in and we prioritize survival over *human connection* and *growth*. When we asked these executives what outcomes they hoped to achieve in responding to

the pandemic, the majority prioritized improving efficiency and productivity over more human-centric initiatives such as strengthening customer engagement, retaining talent, and increasing the company’s impact on society. And in these moments of high stress and low certainty, almost no one was thinking about growing revenues or disrupting their industry.

Answering the call for help

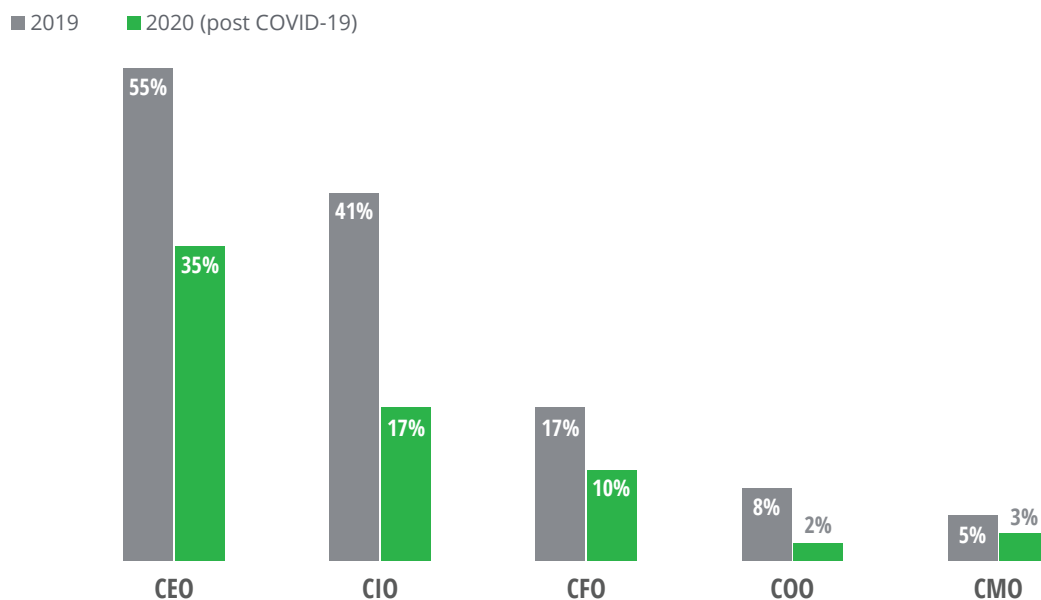
Of course, this isn’t unprecedented or unexpected behavior, but when we polled consumers, they showed us that as times get tougher, they expect more from the brands they frequent. Consider the following findings from our consumer survey:

- Almost four in five people could cite a time a brand responded positively to the pandemic and one in five strongly agreed it led to increased brand loyalty on their part.

FIGURE 1

C-suite executives have all seen a significant drop in confidence

Percentage of confident executives



Source: Deloitte Global Marketing Trends C-suite Survey.

- Conversely, more than 25% of those who noticed brands acting in their own self-interest walked away from those brands.
- More than 70% agreed they valued digital solutions that deepened their connection with other people, and 63% believe they will rely on digital technologies more than they did prior to the pandemic even well after it subsides.
- Fifty-eight percent of respondents could recall at least one brand that quickly pivoted to better respond to their needs, and 82% said this led to them doing more business with the brand.

When we analyze these findings in tandem, we see a very clear message: In these wild times of uncertainty, people are looking to brands for *help*—and rewarding those that can meet their most pressing needs in the moment.

In this spirit, we developed seven trends to help executives break through this wall of uncertainty and take action. These trends can enable leaders to *respond* to customer needs as they unfold, *pivot* business models to better align to evolving needs, and *foster* the human connection we all crave.

Breaking through with seven trends

Each of our 2021 global marketing trends shares the common theme of breaking out of our often-defensive mindsets to more holistically—and authentically—meet human needs.

In our opening trend chapter on **Purpose**, we establish the foundation required to flourish in even the most turbulent of times. To do this,

organizations should be deeply attuned to why they exist and who they are built to serve.

Our second chapter, **Agility**, explores how organizations can best structure themselves to not only live out this purpose, but also to do so as stakeholder needs unfold.

The **Human Experience** chapter explores how organizations can break out of their efficiency-first mindsets to elevate the experiences of their customers, workforces, and business partners. In our fourth chapter, **Trust**, we provide a means to holding brands accountable and ensuring that the messages they convey are congruent with the experiences they deliver.

Our fifth trend chapter, **Participation**, makes use of an in-depth consumer study to highlight how some of the leading companies in the world are harnessing customer passion to bolster their engagement strategies through customer-led innovation and advocacy.

Our **Fusion** trend sheds light on how some of the most creative companies in the world were able to overcome their defensive mindsets to create entirely new solutions through the fusing of new partnerships, customer ideas, and digital ecosystems.

The final chapter, **Talent**, provides a line of sight into how marketing can elevate its talent model into a competitive differentiator—even in the toughest of times.

These trends do not purport to predict what the future holds, but they may offer something more pressing: a path forward to help your customers, workforces, and society when, collectively, we need it the most.

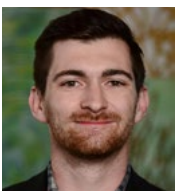
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Agility

The time is just right for marketers to leverage relevant digital tools and design an organizational road map to make agile marketing a reality.

Changing the playbook

Agile marketing for our increasingly digital world

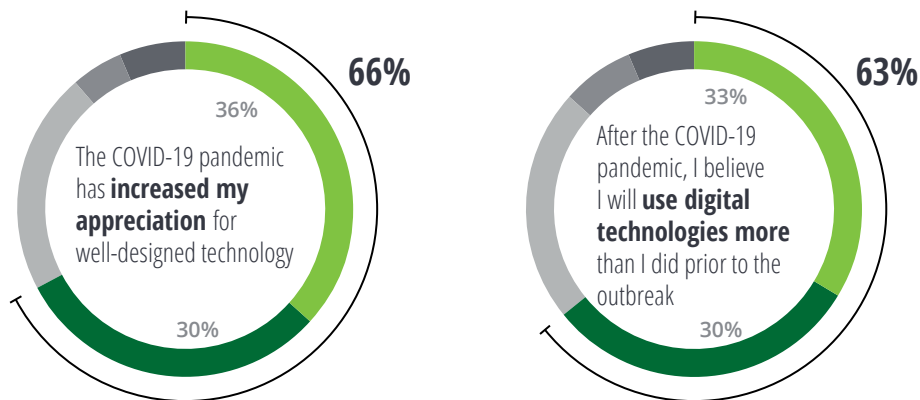
FOR DECADES, THE recession playbook remained mostly unchanged: Either retrench, focus on costs, and ride out the downturn, or spend ahead of demand with a view to capturing market share. However, the current pandemic-triggered recession is unique in that it has forced massive, rapid changes in consumer behavior—away from brick-and-mortar stores and toward digital channels. Consequently, navigating the downturn requires a new playbook: Pivot to an agile digital channel strategy that meets customer needs as they unfold or risk losing relevance in an already tight marketplace.

In our survey of 2,447 global consumers, 58% were able to name a brand that was able to quickly pivot its offerings to better react to the “new normal” induced by COVID-19. Of this set of respondents, 82% said such new, relevant offerings had increased their desire to do more business with these brands. COVID-19 has also heightened customers’ appreciation and adoption of digital channels, with 66% agreeing that the pandemic has increased their appreciation for well-designed technologies; 63% agreed they would continue to use digital technologies more often well after the pandemic subsides (figure 1).

FIGURE 1

Consumer sentiment change toward digital technologies due to COVID-19

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

Many marketers are aware that they should possess the ability to swiftly navigate an increasingly digital world (see sidebar, “Be the signal, not the noise”). In another study we conducted, where we surveyed 405 C-suite executives, 41% said the top outcome they hoped to achieve by implementing more digital technologies and platforms was to react more quickly to customer needs (the highest of all responses). For marketing leadership, this represents a watershed moment. Given the rapid changes in customer engagement expectations, coupled with customers’ increased appreciation of and dependence on digital technology, it is now more important than ever to accelerate—rather than throttle—investments that empower organizations to quickly respond with the most relevant customer messaging and offers.

In this article, we lean on a mix of examples from the field and primary research to help leaders design their own organizational road map toward relevant, agile marketing.

Three trends that help make agile marketing a reality

Organizations can position themselves to meet customer needs better by applying insights derived from these three trends:

HAVING A CLEAR PICTURE OF THE MARKET

The foundation for agile marketing often requires a single, unified organizational view of the customer. This necessitates designing a data system that integrates once disparate, cross-organizational datasets into a single customer data platform (CDP).

What does this entail? At the baseline, organizations should develop or adopt a platform that connects data from a variety of channels such as e-commerce and social media; devices such as laptops, mobile phones, and tablets; and platforms such as customer relationship management (CRM) systems to map out customer journeys. This can help them create a more holistic customer experience.¹

BE THE SIGNAL, NOT THE NOISE

In a market flooded with content, consumers are exposed to anything between 400 and 10,000 advertisements per day, each vying for their attention.²

Because of this, most content goes unnoticed and those charged with designing and deploying advertising messages face the unenviable task of rising above the clutter. So, how can marketers effectively break through the noise?

Relevance is what captures audience attention and their ensuing interest. Relevant content connects a brand to what is top of the mind for consumers when they receive the content. At its core, it can be as sophisticated as engaging in cultural moments when they happen or as simple as selling snow tires when it’s snowing.

The art and science of delivering relevant content relies partly on the creative direction of marketers, and largely on data-driven insights—understanding your customer, keeping track of what’s trending, and having the real-time delivery capability to craft relevant customer messaging.

Agile marketing requires a single, unified organizational view of the customer, which can be gained through a customer data platform.



Take for example a global consumer goods manufacturer that underwent an initiative to establish its own CDP to provide more relevant and personalized customer offerings. Previously, the marketing database had a difficult time keeping up with the changing needs of the customer as it consisted of 1,700 tables that were updated on a weekly cadence. By mapping out the customer journey across the various information sources, the manufacturer was able to consolidate these sources into eight tables that reflected key customer interactions across their website, mobile apps, text messages, call centers, and instore transactions. By doing so, it was able to effectively deliver relevant marketing solutions across the customer journey to more than 50 million customers—as their needs unfolded in real time.³

ANTICIPATING THE CONVERSATION

To truly answer the call of the customer, an organization should be able to sense—and understand—the needs of the customer. Thankfully, a holistic CDP combined with “predictive sensing” technologies (powered by machine learning and

artificial intelligence) makes this possible for many organizations.

For instance, Deloitte Digital’s social sensing capabilities forecast where conversations are headed over the next 72 hours, helping enable organizations to scan conversations in the marketplace, measure consumer sentiment, and predict where those conversations may trend over the coming days. This can be as specific as measuring and predicting sentiment on advertising messages or determining where people who have recovered from COVID-19 may be most open to donating plasma containing antibodies.⁴

EMBRACING SOCIAL CRM

Once they have a sense of where the conversation is heading, marketers have myriad channels at their disposal to engage with their audiences. Beyond traditional channels such as email, print

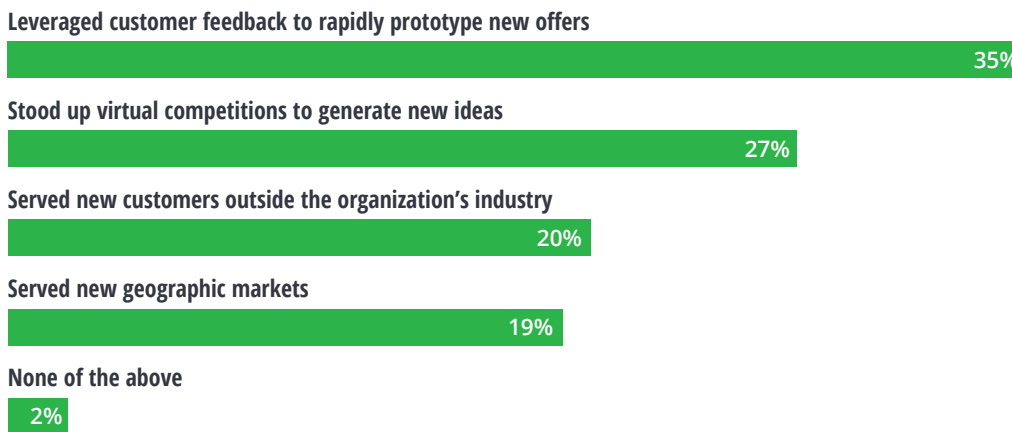
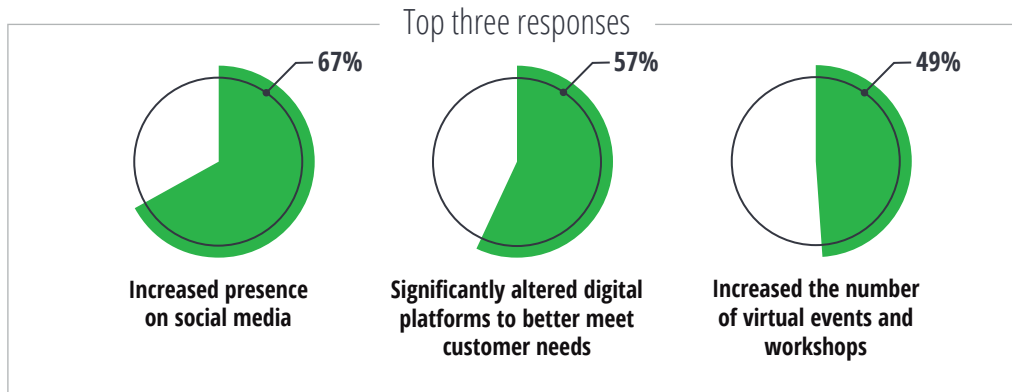
media, TV, and social media, there is a burgeoning set of social channels that some of the savviest marketers—both in B2C and B2B markets—are developing into entire social CRM ecosystems. Simultaneously, to better engage with customers during the pandemic, 67% of the C-suite respondents said they increased their presence on social media (highest of all engagement strategies; figure 2). Now, as more companies—especially in China—leverage their social channels to more broadly and dynamically interact with customers, a new set of use cases are emerging through social CRM.

So, what is social CRM? Brands are leveraging their social platforms as an avenue to provide “one-on-one service” at scale.⁵ Take B2B company Sany Heavy Industry, for instance. The heavy machinery manufacturing company uses social messaging platforms to not only highlight the machinery in its catalog but also to provide interested parties a simple way of scheduling a meeting with a sales representative.⁶

Although marketers have long been using social platforms to message content through influencers or key opinion leaders (KOLs), some are now doing it at a more microlevel by creating virtual KOLs.⁷

FIGURE 2

Through the pandemic, how has your organization interacted with customers?



Source: Deloitte Global Marketing Trends C-suite Survey.

For example, China-based cosmetics company Perfect Diary developed a virtual KOL, Xiao Wanzi, to offer her followers advice on its products and share tutorials on using them in the best way. Part of what makes her so good at her job is that she isn't real!⁸ Perfect Diary developed the virtual persona of Xiao Wanzi to interact with consumers and help set trends in the marketplace.

Both Perfect Diary and Sany Heavy Industry are examples of companies pioneering the use of social media for large enterprise digital marketing and commerce. For many companies based in the western hemisphere, this trend is just beginning to take form, with many refining their social strategies within their Chinese markets.

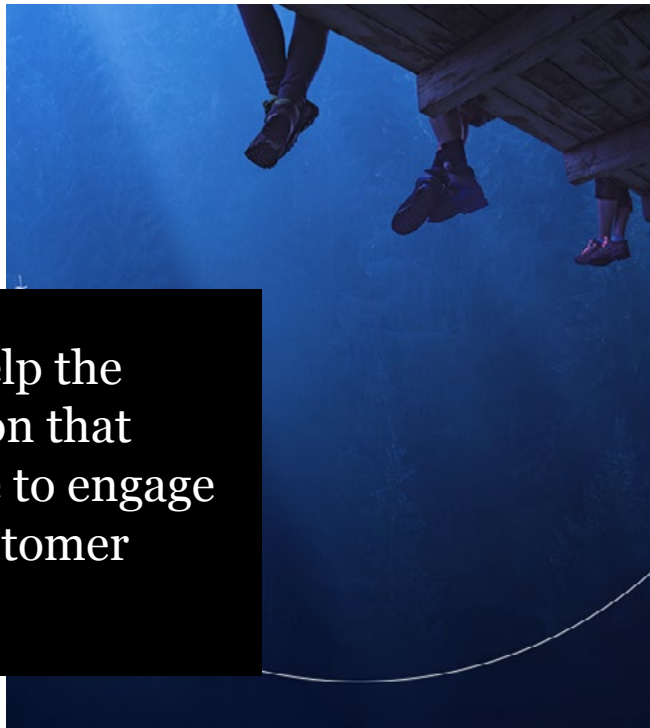
Starting your journey to agile

For organizations to be able to implement these tools and capabilities effectively and make agile marketing a reality, the C-suite needs to operate from a foundation of a clear, enterprisewide vision. Based on our research, here are three steps marketers can take to create and execute on their vision of agile marketing:

1. Lead through the customer. With CDPs becoming more commonplace (and better supported by major technology vendors), marketers can be bold in their aspirations. This starts with understanding the customer and their needs—a position the CMO is uniquely qualified to navigate (see our trend on [Fusion](#) to learn more).⁹ Our research shows that CMOs have a significant impact on customer experience conversations within the C-suite (81%). They can use this position of knowledge to help map out a unified vision for the organization.

2. Collaborate on channel strategy design. When we asked members of the C-suite which functional areas will be most critical over the next year, digital technology and sales and marketing were cited the most (68% and 63%, respectively). Naturally, these two areas will be

It's upon the CMO to help the C-suite articulate a vision that brings these tools to life to engage with and respond to customer needs as they develop.



incredibly relevant while designing a channel strategy that works in concert across the customer journey. In this context, the CMO and chief information officer (CIO) can better position their agile strategy by bringing key members of the C-suite—such as the chief sales officer (CSO)—into the fold early and incorporate their needs and insights into the channel strategy design.

3. Rapidly prototype—and launch—new offers. For agile marketing to be successful, speed is of paramount importance. Yet, figure 2 shows that only 35% of organizations are

leveraging customer feedback to rapidly prototype new offers. Considering the importance of relevant messaging—coupled with a clear understanding of the customer journey—there may be no better time to lean on sensing technology and social CRM to embrace rapid execution.

For the first time, the tools to successfully execute agile marketing are readily available to organizations. Now, it's upon the CMO to help the C-suite articulate a vision that brings these tools to life to engage with and respond to customer needs as they develop.

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