



2021 Global Marketing Trends

Find your focus

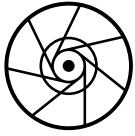
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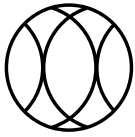
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Introduction

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

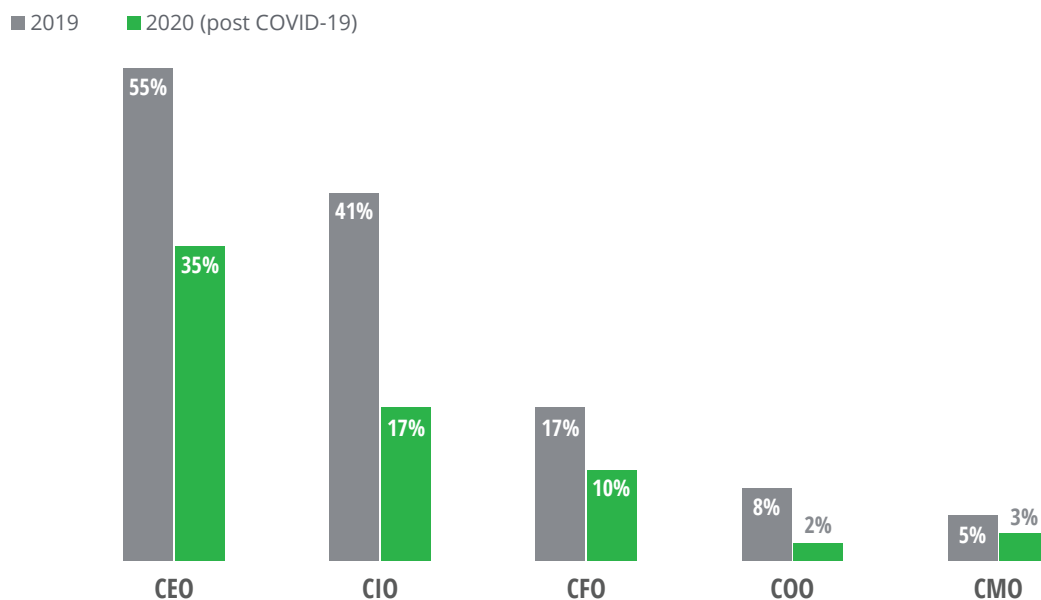
Of course, this isn’t unprecedented or unexpected behavior, but when we polled consumers, they showed us that as times get tougher, they expect more from the brands they frequent. Consider the following findings from our consumer survey:

- 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.

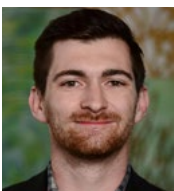
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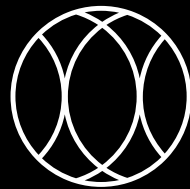
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Fusion

Organizations can better help the people they serve by creating innovative experiences through cross-industry partnerships.

The new ecosystem

Fusing cross-industry partnerships in a postpandemic world

THE WORLDWIDE SHUTDOWNS triggered by the COVID-19 pandemic have brought our universal human needs to the forefront.

These needs range from access to essential products and services and connecting with family and friends to navigating disrupted work environments at a time when “normal” life has fundamentally changed. In many ways, the crisis has created a crucible of experimentation and innovation as communities, companies, governments, and individuals work to piece together new ways to meet these unmet human needs.

In our [inaugural trend report](#) on *Fusion*, we discussed the 60-year evolution from last century’s industrial, supply-driven products and services to more customer-inspired solutions.¹ The result: The most disruptive companies started looking beyond traditional industry boundaries to find better ways to serve customer needs.

Now, we see a new pivot happening across industries. Many organizations are moving past serving customers with point products and solutions. They are going a level deeper to truly understand the needs of the people they serve in a more fundamental way. And with that knowledge, they’re working to meet the needs of their people more holistically. It’s not about doing “the same thing better.” Rather, organizations have an opportunity to completely reimagine partnership strategies that open the aperture of solutions for the people they serve.

They must remember: People don’t need cars, they need to get from point A to point B, just as they don’t need surgery, they need to be well.

While some organizations were already making efforts to align with this human-centric mindset, COVID-19 shifted the dynamics for many others practically overnight. And in the face of dire economic conditions, some companies pivoted to look for creative ways to meet these evolving needs, leading to new collaborations—or *fusions*—across industry lines. Amid uncertainty about the pandemic, these organizations entered into new partnerships that engaged customers in novel ways and made major, transformational investments in digital platforms in a matter of months—all in pursuit of finding innovative ways to meet people’s needs.

People don’t need cars, they need to get from point A to point B, just as they don’t need surgery, they need to be well.

What’s striking and instructive for executives is the paradox between these forward-leaning investments and the current defensive, operational mindset in the C-suite. In Deloitte’s survey of 405 C-suite executives, we asked leaders the top

outcomes they hoped to achieve while responding to the pandemic. Overwhelmingly, most of them viewed their investments through a reactionary lens, with improving productivity and efficiency (42%) and better managing risks (38%) topping the list. Very few looked at these investments to grow revenues (17%), differentiate themselves from the competition (17%), or disrupt their industries

(6%)—all of which can be essential ingredients for thriving in the future (figure 1).

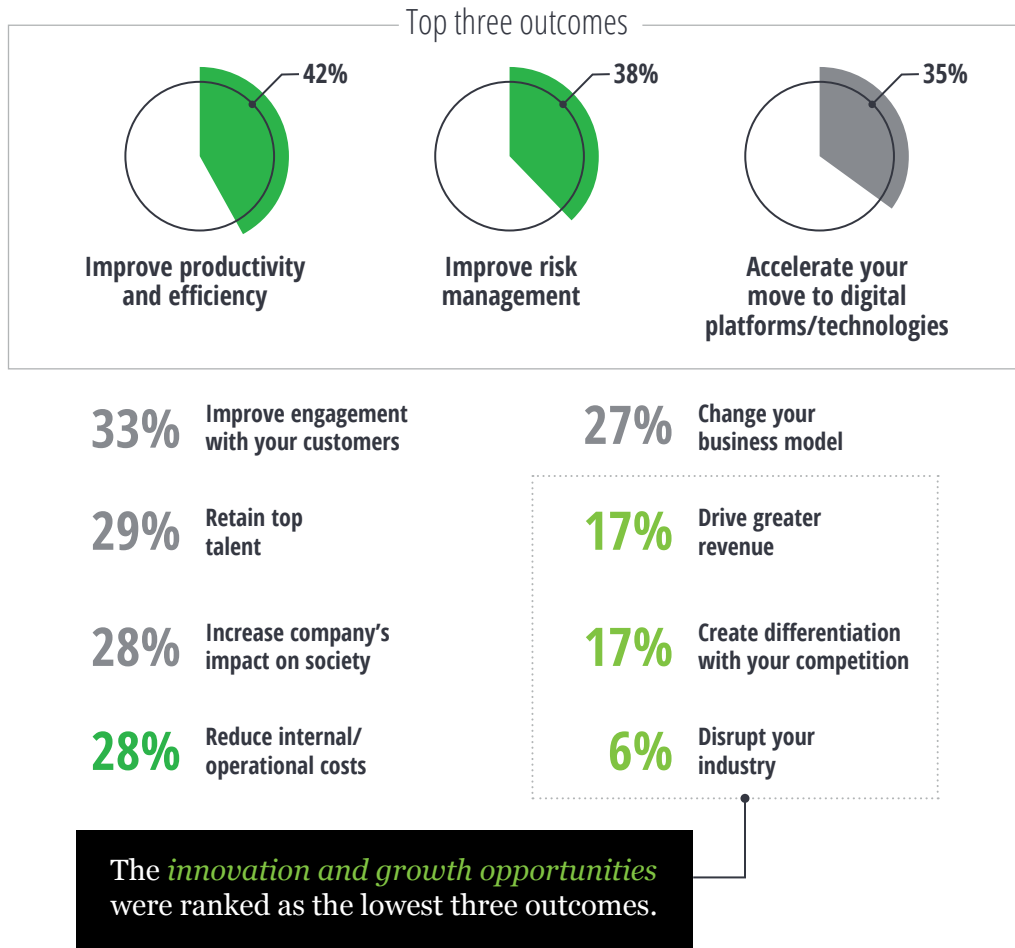
In this article, we explore how companies can break out of this defensive mindset and proactively meet the evolving needs of the people they serve. We begin by exploring how pioneering partnerships can provide the ingredients for

FIGURE 1

The C-suite is operating through a largely defensive mindset, leaving future growth opportunities on the table

How C-suite executives rated the top three outcomes they hoped to achieve while responding to the pandemic

■ Operational and efficiency plays ■ Innovation and growth opportunities ■ Other business outcomes



Source: Deloitte Global Marketing Trends C-suite Survey.

growth and close with a discussion on how chief marketing officers (CMOs) are uniquely positioned to lead the charge by innovating along with and through the eyes of the customer.

How organizations are better addressing human needs through fusion

Through a combination of primary research and examples from the field, we explored how brands can look beyond what they do *today* and fuse new partnerships that integrate customer insights and digital platforms in their innovation road maps to surprise and delight the people they serve.

THE POWER AND PROMISE OF BUSINESS PARTNERSHIPS

Holistically delivering on human needs often requires a shift in mindset. For brands, it can mean thinking beyond their *own* products and services and seeking out partnerships that empower them to better serve their stakeholders. The early days of the pandemic helped incubate many creative, unexpected business partnerships to solve new challenges. Consider the pivot by restaurant dining app OpenTable, which entered into new partnerships with a variety of supermarket chains and other essential businesses to turn a visit to grocery and other retail stores into a reservable event. As a result of that collaboration, people could safely—and predictably—buy essential items without the worry (or hassle) of being caught in large crowds.²

Beyond the pandemic, there are many examples of companies moving outside of their traditional domains to meet emerging needs, such as ExxonMobil's collaboration to create a new car care ecosystem in China. Shifting from traditional B2B to a more customer-driven market, ExxonMobil partnered with a global tech company and a local

car care brand to create a “digitally enabled car-maintenance experience.”³ A data platform created through the ecosystem enables customers to receive maintenance recommendations and make online reservations to have cars serviced; at the same time, it enables ExxonMobil to not only fuel vehicles but also ensure they are running safely and effectively.

Whether formed before or during the pandemic, there's new evidence that these cross-industry, cross-boundary partnerships have staying power, according to C-suite leaders. In our survey, we asked how companies adjusted their business models to better respond to the pandemic. Though entering new business partnerships was a distant second to digital acceleration initiatives (64% versus 36%), we see evidence that these new business partnerships have the most staying power after the pandemic.

How do we know this? We asked executives if they would revert to old models or carry on with the new models once the pandemic subsides. Executives across the board—a resounding 78%—indicated that new partnerships would be retained to some degree, highest of all business model changes (figure 2).

Whether out of sheer necessity to survive or because they saw new opportunities, many brands that took the leap and entered into new partnerships found better ways to more holistically serve people—both in the short and long term.

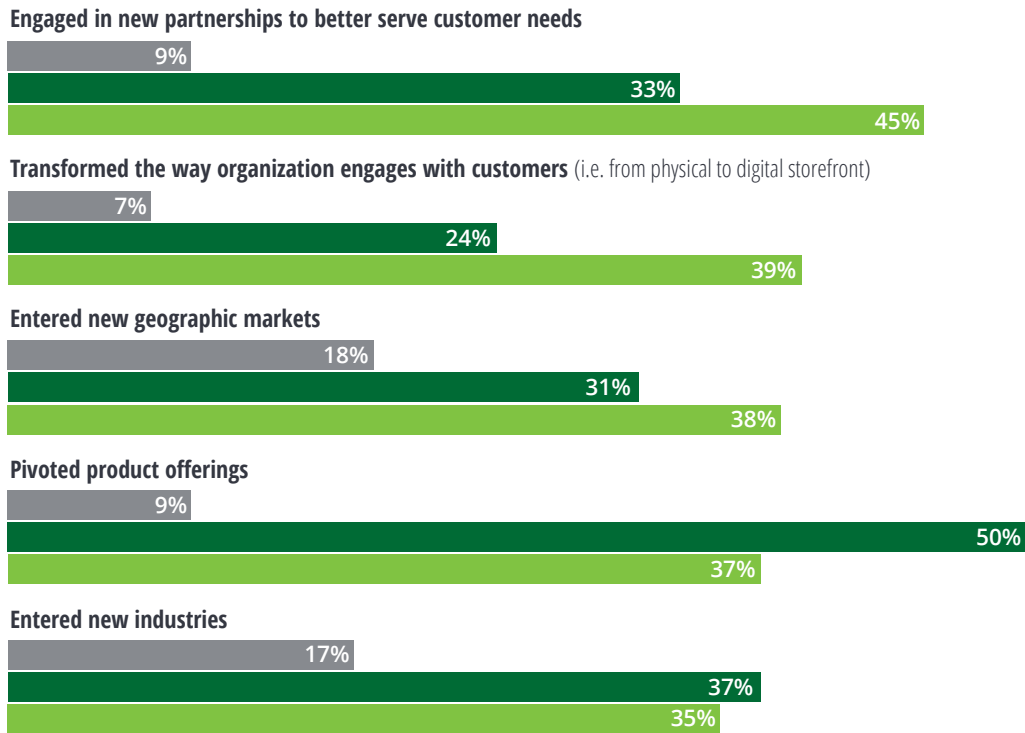
INTEGRATE CUSTOMER INSIGHTS ACROSS INDUSTRY LINES

It can be difficult to take a comprehensive view of the customer if insights are limited to your industry. To gain a more complete picture of behavior and underlying needs, brands can seek partnerships that provide complementary views of the people they are serving. At its core, it means

FIGURE 2

Most executives agree that new partnerships forged during COVID-19 will continue after the pandemic subsides

- Should immediately go back to former business model
- Should retain some portion of this new business model
- New business model is a long-term solution for success



Source: Deloitte Global Marketing Trends C-suite Survey.

building robust data mechanisms that capture the full landscape of customer behavior and feedback so companies can involve the people they serve directly in the innovation process.

Here are two ways brands are using cross-industry partnerships to design innovation strategies in a human-centric spirit:

1. Listening to evolving needs through

social: Social sensing doesn't have to be limited to crafting timely customer messaging (see our trend on [Agility](#) to learn more). It can also provide a direct line of sight into what people need *now*. For instance, during the

pandemic, Lloyds Bank expanded its partnership with Mental Health UK to foster public awareness and offer resources on dealing with the negative mental health impact of financial problems.⁴ By directly listening to people, Lloyds Bank—with the help of a key partner—didn't just create a banking solution; it crafted a financial and mental wellness solution at a time when wallets were tight and anxieties were high.

2. Inviting customers to participate:

Inviting people to directly participate in the knowledge-sharing process affords brands a unique opportunity to learn what people really need to

drive innovation efforts (see our [Participation](#) trend to learn more). Take the example of GovConnect, a convergence of digital solutions that includes a COVID-19 contact-tracking and tracing effort. GovConnect enables individuals to opt in to create a network of their mobility to help pinpoint potential exposure to the virus.⁵ The public-facing portal—created by leading technology companies—also helps participating members of the public find community and government services through customized recommendations. Simultaneously, GovConnect helps government leaders and public health officials make better real-time decisions for responding to the pandemic.

In this way, by coalescing insights from customers at a cross-industry intersection of their needs, companies can develop solutions that anticipate and respond to evolving demands.

HARNESS NEW PARTNERSHIPS TO EXPAND DIGITAL ECOSYSTEMS

While the role and importance of digital have been exploding for many years now, the pandemic was a turning point that drove many organizations to not only accelerate their move to digital platforms, *but also to find new ways and new partnerships to address needs through digital.*

To understand these dynamics, we surveyed 2,447 global consumers to understand the new ways in which people are navigating their COVID-19 environment. This included activities such as shopping for essentials, continuing their work and education, consulting with doctors, and connecting with family and friends—all with minimal human contact and often enabled by cross-industry digital solutions. Interestingly, people were more open and willing than ever to test new solutions during this worldwide digital test drive. Among eight different activities, 82%

tried at least one of these digital activities for the *first time* (figure 3).

ConvergeHEALTH Connect powered by technology platform Zyter is one such example of emerging digital telemedicine services coming to life during the pandemic, offering patient video visits, virtual “smart” exams with patients, secure file-sharing, and other provider-to-provider collaboration for health care teams.⁶ Through multiple cross-industry partnerships, ConvergeHEALTH Connect helps enable health care providers and government health agencies to digitally triage patients. In addition, it helps protect patient privacy while shifting the care of presumptive cases into the virtual space, provides the ability to extend critical care virtually using digital innovation, and enables providers to efficiently deploy evolving protocols and virtually consult specialists to advance patients through the continuum of care.

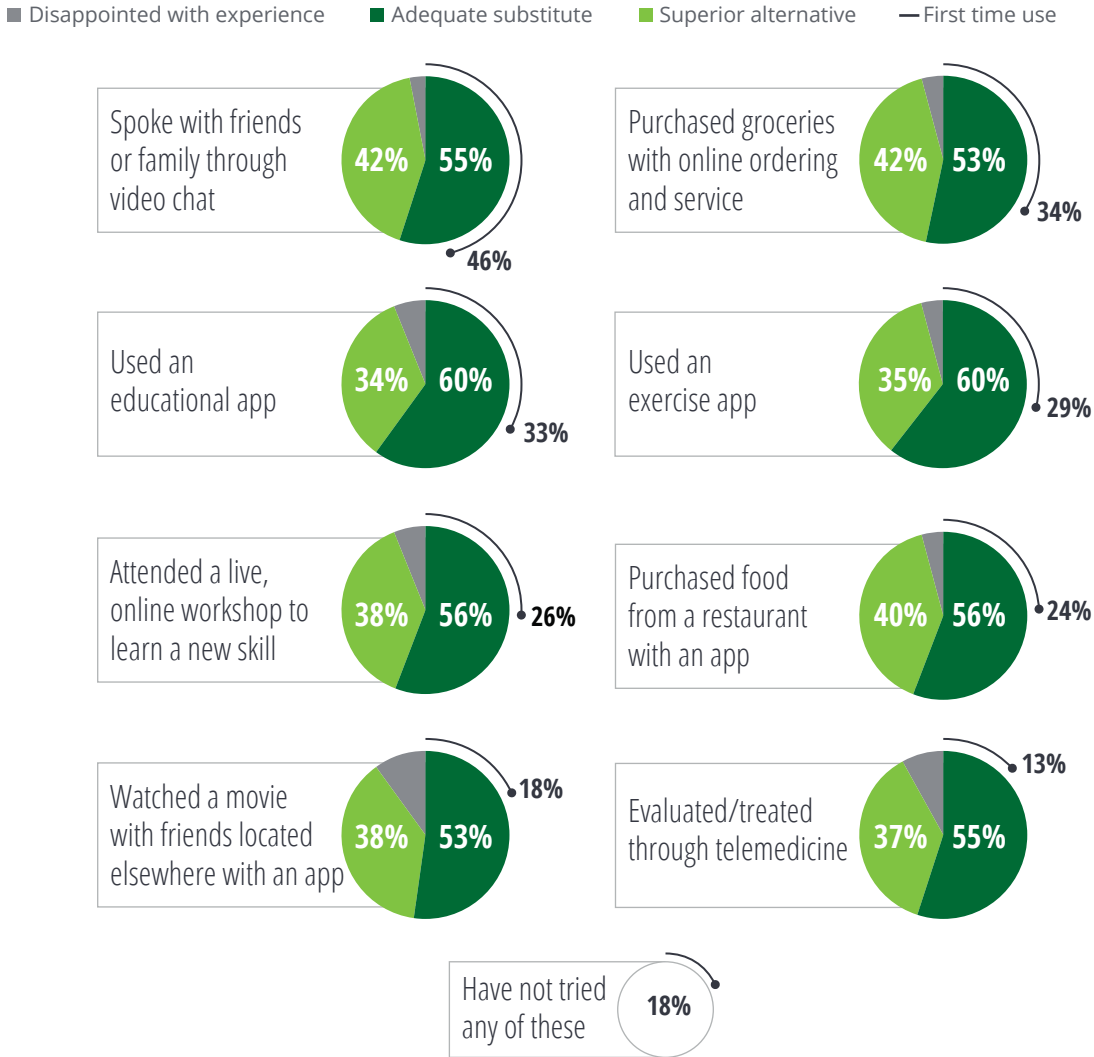
Through multiple cross-industry partnerships, ConvergeHEALTH Connect helps enable health care providers and government health agencies to digitally triage patients.

Amid a new environment where people are physically isolated from one another, we found that the vast majority were largely satisfied with these new experiences. Across all categories, at least 53% found their new digital experiences an adequate substitute, and about a third even said these digitally native methods were a superior alternative to their in-person experiences.

FIGURE 3

Most customers who tried digital experiences for the first time during the pandemic were satisfied with them

First time trying digital experiences and their satisfaction with those experiences



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

Even after the pandemic subsides, the evolution of these digital platforms will likely continue to provide executives with fresh partnership opportunities to create a virtuous cycle that

enables them to study the needs of the people they serve; infuse insights about their needs and motivations into future offerings; and unlock competitive advantages for their organizations.

Accelerating your fusion journey

For organizations to tap into the competitive advantage and bottom-line results of fusion, the C-suite should shake off its largely operational mindset and move toward aspirational and innovative partnership strategies that drive future growth. The CMO, as the C-suite executive often closest to the customer, is uniquely equipped to lead the charge of this innovation. Here are two recommended actions marketers can take to drive the innovation agenda for their organizations:

1. Own the innovation road map. CMOs have always underplayed their role in driving innovation, perhaps because they underestimate the value of their tacit customer knowledge or don't see peers clamoring for innovation to be part of marketing's remit. But the pandemic saw the profile of marketing elevated across the C-suite, with executives seeing marketing and sales as the second-most critical function in the coming months (63%), after digital technology (68%). CMOs are positioned to advise the organization on its innovation strategy and should rise up from being just the "receiver" of

a strategy they are responsible for marketing to customers downstream.

2. Fusion starts with customer needs.

Earlier this year, our analysis found that CMOs are most effective when they own an organization's innovation road map and customer experience.⁷ It's no coincidence that these two aspects go hand in hand—the only way to truly address human need is to look at it through the eyes of the customer. CMOs can leverage their insights into customer behavior and expectations to guide the choice of beneficial business partnerships while embedding customer feedback into the digital ecosystems they design.

Fusion is about reimagining the art of the possible when a company goes beyond its four walls to innovate and create for the people they serve. As COVID-19 pushes digital innovation to the forefront, marketers can help their organizations pivot their thinking from "protecting what they have" to opening new doors, new partnerships, and new digital platforms that capture their customers' hearts and minds.

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