



# 2021 Global Marketing Trends

Find your focus

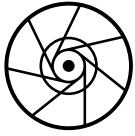
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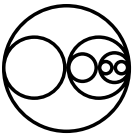
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# Introduction

## 2021 Global Marketing Trends: Find your focus

**T**HROUGHOUT 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.<sup>1</sup> 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."<sup>2</sup> And, more recently, as issues of climate change and gender equality took centerstage, people began to demand more from businesses.<sup>3</sup>

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.<sup>4</sup> 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

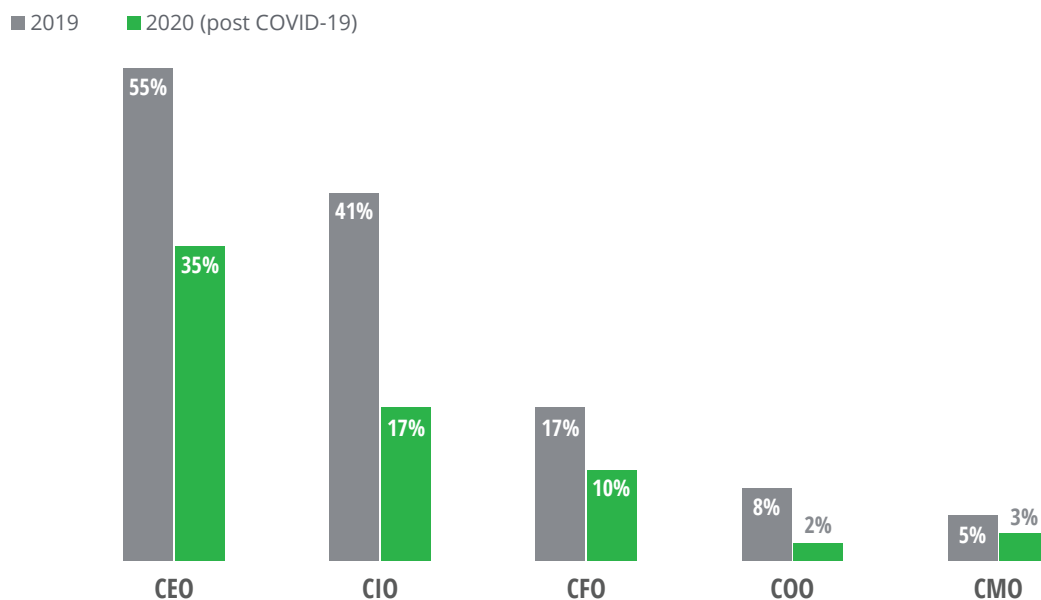
Of course, this isn’t unprecedented or unexpected behavior, but when we polled consumers, they showed us that as times get tougher, they expect more from the brands they frequent. Consider the following findings from our consumer survey:

- 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.

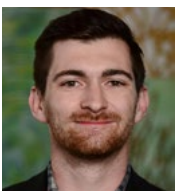
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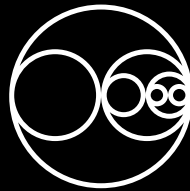
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## Human Experience

Pivot your thinking from speed-to-market and efficiency plays to fostering the human connection.



# Know thyself

## How enterprise values drive the human experience

**W**HAT'S MORE IMPORTANT—efficiency or the human experience? It's the choice between taking a cheaper flight or a safer one; buying clothing with the fastest delivery or from the supplier with the most ethically designed supply chain; relying on a “robo adviser” for your investments or taking out time to ensure your money is directed toward investments that align with your values.

In our inaugural [Global Marketing Trends](#) report, we discussed in the [Human Experience](#) chapter how organizations need to pay down their “experience debt.”<sup>1</sup> That is, when organizations design their digital future for efficiency, rather than human connection, a debt accrues, and this debt can manifest in biased results, lack of inclusivity, and feelings of social isolation.

Then COVID-19 swept the globe. For some organizations, these more efficient but less human-centric solutions proved insufficient at a time when technology became the primary conduit to human connection. As people looked to digital solutions that deepened this connection, they often moved away from the companies that didn't—or couldn't—reflect what they value, toward those that elevated the human experience. For instance, when we surveyed almost 2,500 global consumers in April, one in four people strongly agreed that they walked away from brands they believe acted in self-interest. Simultaneously, more than 70% agreed that they valued the digital

innovations that deepened their connection with others during COVID-19.

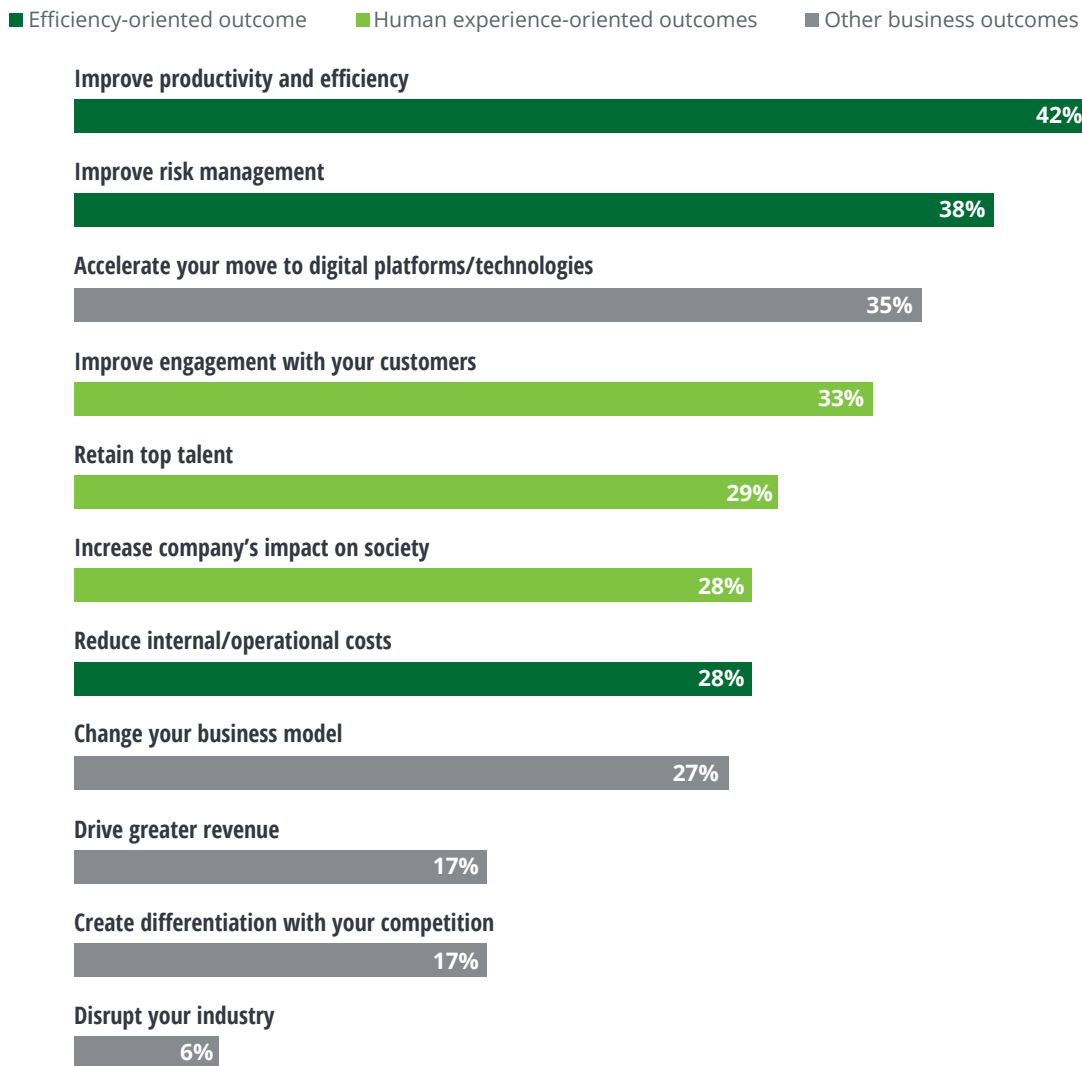
We then dug deeper and asked more than 400 executives in May the top outcomes they hoped to achieve while responding to the pandemic. Interestingly, three intuitive outcomes topped the list: Improving productivity and efficiency, improving risk management, and accelerating organizational moves to digital platforms and technologies (figure 1). Of course, with many organizations scrambling to find any possible means to preserve their business, striving for efficiency and better risk management is a logical path forward. But something else also caught our eye: This period of uncertainty put a spotlight on our universal need for *connection*. Our executive

**Organizations should view themselves as human entities that mirror—and support—the values of those they are built to serve.**

survey found that improving customer engagement, retaining top talent, and increasing the company's impact on society—all ways to connect with customers, workforces, and society—were the next most important objectives for many organizations.

FIGURE 1

## Greater productivity and efficiency are the top outcomes executives hope to achieve while responding to COVID-19



Source: Deloitte Global Marketing Trends C-suite Survey.

So, how do executives strike a balance between the organizational need for greater efficiency and people's universal need for human connection? *We believe it starts with being more human.* Just as COVID-19 and a reckoning with systemic racism led to people reevaluating and reflecting on their personal values, organizations should do the same to meet the needs of their customers, workforces, and business partners. They should view

themselves as human entities that mirror—and support—the values of those they are built to serve.

To truly ensure that an organization operates as a human entity, it needs to balance human needs with speed-to-market and efficiency objectives—or risk greater accrual of “experience debt.” In this article, we lean on our research and examples from the field to provide leaders with a road map to help

bring human values to the forefront of their solutions and empower them to respond quickly—and authentically—to human needs.

## Reimagining organizations to be more human

Times of societal disruption—such as the ongoing pandemic—can be a call to action for companies to rethink their values, operations, and infrastructure. It’s an opportunity to innovate and rebuild the human experience in a manner that addresses our collective needs. Here are two ways in which an organization can transform itself into the more human-centered enterprise the world is expecting:

### BRINGING VALUE-BASED SOLUTIONS TO MARKET

Why start with values? Because values drive human emotions and actions—they are not the things we do, but explain *why* we do them (figure 2).<sup>2</sup> Ninety-five percent of our purchasing decisions are driven by subconscious urges, the biggest of which is emotion.<sup>3</sup> In our earlier [study covering 16,000 persons](#), we found more than half of all people desired a more “human” experience from their virtual environments.<sup>4</sup>

And as time went on, even these virtual experiences had diminishing returns as technology couldn’t fully compensate for in-person interactions.

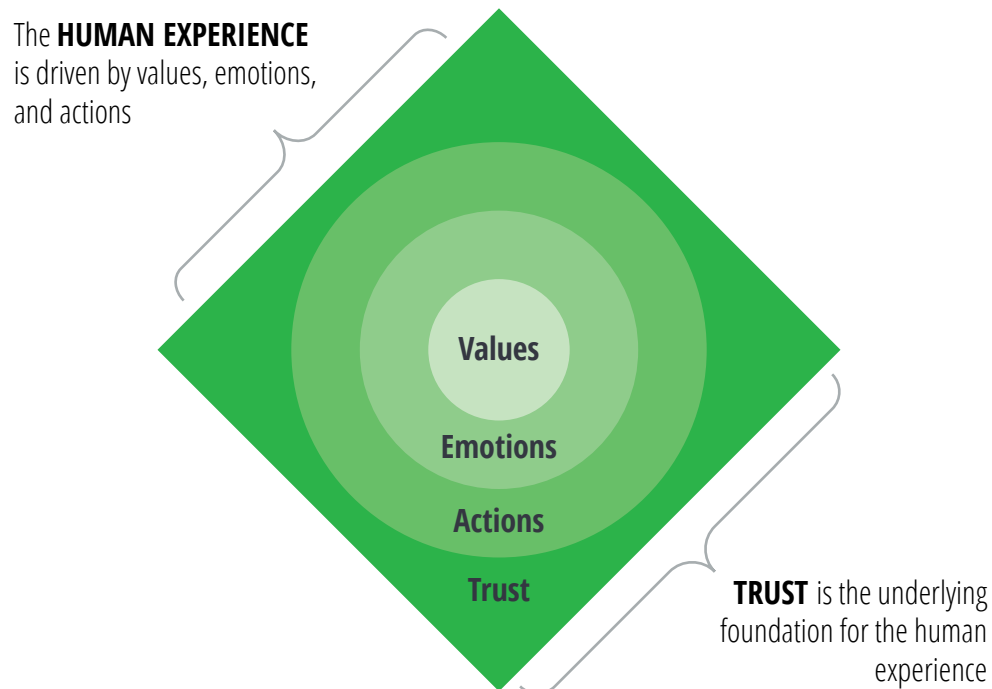
Complicating matters is the fact that in the past, organizations relied on in-person interactions to bolster the human connection while new-age digital solutions are likely a little less human. Promisingly, however, some companies have been able to quickly pivot and revamp their digital environments to better foster this connection. For instance, Kenu, a smartphone accessory manufacturer, used to regularly visit its Chinese partners to tour their manufacturing plants and connect with key stakeholders.<sup>5</sup> When travel became restricted due to the pandemic, Kenu moved these visits to a virtual environment. By using 360-degree remote cameras and a collaboration platform named AVATOUR, Kenu continued to conduct regular plant tours with key business partners. An added benefit of going digital: They can now meet anytime.

Virtual experiences have diminishing returns as technology can’t fully compensate for in-person interactions.



FIGURE 2

## The human experience starts with our core values



Source: HX in Uncertainty research.

While this is an example of connecting in a virtual environment, how can organizations deepen the human connection in the physical space? Our research revealed that Americans can be segmented into three distinct patterns of behaviors and perspectives (we call them clusters): the Protectors, the Pragmatists, and the Prevailers.<sup>6</sup> Each cluster is named to convey the mindsets and motivations of the individuals that fall within it. Pragmatists are inherently curious people who like to control their routines. Although these people are generally cautious while navigating their pandemic environments, they are also open to trying new things that prioritize safety. Then there are the Prevailers—while they too value control, Prevailers tend to over-index on trying new things on their own

terms (Protectors fall in the middle of the clusters). Prevailers are less willing to change their behavior in the service of “blind” pandemic safety mandates.

For organizations serving both Pragmatists and Prevailers, this means designing experiences that make people feel safe while also cultivating a space that allows them to connect. One company, Clear Mask, responded to these issues by developing a mask that, as the name implies, is clear.<sup>7</sup> Now, people can choose masks that offer the added communication benefit of facial expressions being visible. Further, these masks also support more inclusive design practices as they empower those with hearing impairments to communicate more easily while wearing masks.

At a more micro level, it's important for brands to understand their purpose. For instance, global furniture company IKEA has a vision to “create a better everyday life for the many people—for customers, but also for our coworkers and the people who work at our suppliers.”<sup>8</sup> To help develop new home design ideas in an environment that's safe for both customers and employees, IKEA offers an augmented reality design room that pairs customers with interior designers and technologies. It also enables them to walk through their homes and visualize what different combinations of products could look like in their living spaces.<sup>9</sup>

### REDESIGNING INFRASTRUCTURE TO RESPOND TO SOCIETY'S MOST PRESSING NEEDS

Crises always create opportunities for organizations to reset, innovate, and better serve the needs of individuals and communities. For instance, consider the devastating effects of Hurricane Katrina in the United States in August 2005.<sup>10</sup> At the time, it was estimated that 80% of New Orleans was flooded due to the city's poor infrastructure and engineering policies. Following the disaster, the city invested in modern engineering and sophisticated computer modeling techniques to create the best flood control system of any coastal city in the United States.

Companies can use times of unrest to assess if they are prepared to respond, and if not, use their learnings to redesign internal processes and policies to come out stronger than before. Members of the Business Roundtable, a nonprofit organization of CEOs from some of the world's leading brands, have already released a statement on the “purpose of a corporation.” The statement acknowledges that businesses need to address needs such as employee fairness, ethical supply chains, and protect and support the communities they work in.<sup>11</sup>

Some leading brands today are actively engaging in such self-assessment and making changes to their infrastructure and policies to meet the needs of society. For example, to address issues of inequality and systematic racism, PepsiCo CEO Ramon Laguarta in an open letter talked about the three pillars of policy changes—and corresponding measurable goals—that the company has implemented.<sup>12</sup> Here are some steps PepsiCo has taken around each of the three pillars:

- **People:** To increase the representation of minorities in its ranks, the company has announced a goal to expand its Black managerial population by 30% by 2025. In addition, it is focusing on increasing recruitment efforts with Historically Black colleges and universities.
- **Business partners:** PepsiCo also stated that it will double its spending on Black-owned suppliers and leverage its influence to create more roles for Black creators at its marketing agencies.
- **Communities:** To help drive long-term change, PepsiCo will invest US\$20 million more dollars over the next five years in Black communities. This includes programs designed to provide jobs, nutrition, and mentoring and management training for Black-owned small businesses.

Similarly, yogurt producer Chobani built a comprehensive approach to supporting its entire ecosystem of stakeholders. For instance, to bring better food to people around the world, the Chobani Incubator provides innovative food and beverage startups with grants, mentorship, and access to its partner network.<sup>13</sup> And in terms of its own people, Chobani Shares invites all full-time employees the chance to own equity in the company and share in its growth.<sup>14</sup>



Meeting the most pressing needs of people requires a deliberate approach to uncovering these needs and addressing them holistically.

In the absence of such a deliberate approach—as adopted by PepsiCo and Chobani—to address human needs, organizational [trust can erode](#). These examples highlight an important takeaway: Addressing the most pressing needs of people can take more than just good intentions—it can require a deliberate effort to uncover human needs and address those needs holistically.

## Becoming a bit more human

Reimagining your organization to be more *human* often starts with empathetic leadership. Here are three areas leaders can focus on *today* as part of their longer-term journey to better elevate the human experience:

- **Look for blind spots:** It's hard for an organization (or an individual) to see their own blind spots. It's also a very personal process that most likely starts with the CEO playing an active role in reaching out and listening to those the organization represents. Thankfully, the CEO can start each one of these conversations on the premise of one universal fact: We are all humans with the need for connection.<sup>15</sup> This entails listening to customers, employees, and business partners to understand—and address—what matters most to them.
- **It's OK to sit out (for a little while):** Speed to market is always a pressing business need, and it's not acceptable to stay put, but sometimes your organization just isn't ready to jump in on the conversation—and that's okay. It's better to sit out and ensure your words match your actions rather than unwittingly straying into one of those "blind spots." Organizations can use such times to reflect and build a plan to systematically address any issues from within before they speak up. This can not only allow them to respond better when

they're ready, but it also can help ensure that their messages are authentic.

- **Be proactive (when you are ready):**

Building an authentic brand typically starts with living out the espoused values of the organization. And when a brand's values match stakeholder values, better solutions can come to fruition. So, how can organizations proactively align their values with those of stakeholders? On many executive teams, the CMO is seen as the customer champion (and hopefully, more broadly, as the human champion).<sup>16</sup> The CMO

can use this position to advocate the needs of their most important stakeholders and ensure that the entire organization is positioned to address those needs authentically.

Moving fast and striving for efficiency will always be important for businesses, but in times of crisis, we're reminded of what's unchanging—*people's values*. When we pause to reflect on what people need, we can design more sustainable solutions that tap into what makes us human—our universal need for *connection*.

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