



2021 Global Marketing Trends

Find your focus

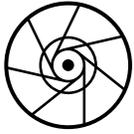
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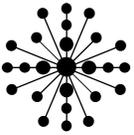
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Introduction

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

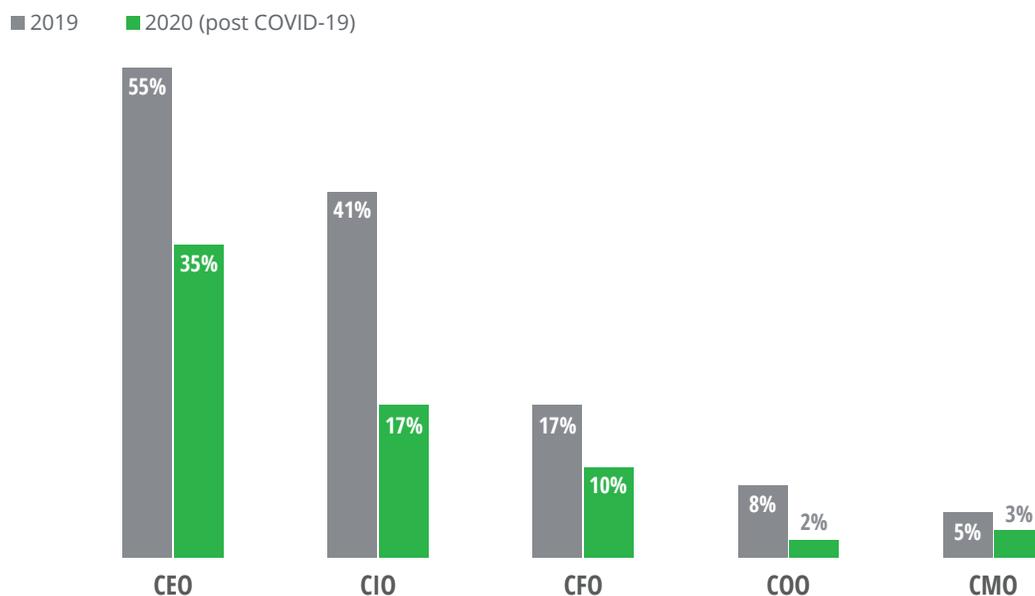
Of course, this isn’t unprecedented or unexpected behavior, but when we polled consumers, they showed us that as times get tougher, they expect more from the brands they frequent. Consider the following findings from our consumer survey:

- 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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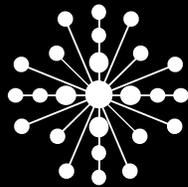
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Participation

Marketers can benefit—and stay ahead of the competition—by crafting an engagement strategy that leans into customer participation at its deepest levels.

A two-way street

How customer participation fuels your engagement strategy

AS BRANDS RUSH to respond to the ever-changing COVID-19 landscape, pivoting business models has become the norm. While the potential directions a brand can take are numerous, one path stands out among the rest: *pivoting the way brands engage with customers*. When we surveyed 405 executives in May of this year, 64% said they transformed the way their organization engages with customers to better respond to the pandemic (most selected of all options).

Customer engagement is quickly becoming a two-way street where customers participate as brand ambassadors, influencers, collaborators, and innovators.

A year ago, our [2020 Global Marketing Trends](#) report discussed how customer participation is changing the way brands craft their engagement strategies (see sidebar, “What is participation?”). Notably, how deeply a customer engages with and participates in a brand can vary across a wide spectrum. Participation can manifest in low-touch, low-effort activities such as writing online reviews and posting about a brand on social media, to deeper forms such as cocreating with a brand to develop new products or produce original content (e.g., uploading videos and blogging). And as

digital technologies bring people and brands closer together (see our trend on [Agility](#) to learn more), the deeper, higher-effort forms of participation are gaining in popularity.

Customer engagement is quickly becoming a two-way street where customers participate as brand ambassadors, influencers, collaborators, and innovators.¹ As such, marketers can benefit—and differentiate themselves from the competition—by crafting an engagement strategy that leans into participation at its deepest levels and maximizes its mutual benefits for customers and brands.

In light of these emerging trends, we launched an in-depth study that polled 7,506 consumers across four countries—the United States, the United Kingdom, Brazil, and China—to better understand *who* is participating in brands, *why* they do it, and *where* they engage the most. We then drew on our primary

research and examples from the field to explore how participation is coming to life across the globe and how marketers can lean into it while building their customer engagement strategy.

Participation across the engagement spectrum

We wanted to understand how people participated over the past year across a variety of engagement activities, from the lower to the higher end of the

WHAT IS PARTICIPATION?

Customer participation represents both the passive and active ways in which people interact to influence brands. Passive participation may include low-touch, low-effort activities in which people provide feedback (e.g., writing reviews) or discuss a brand, while active participation represents the more purposeful and involved ways people interact with brands (e.g., cocreation and developing original content).

spectrum. For lower-level activities, we asked if respondents participated in online conversations (e.g., posting on social media) or wrote online reviews. Alternately, to capture deeper forms of participation, we asked if they gave online advice (e.g., video tutorials or “how to” expertise); posted original content about a brand (e.g., visual content or blogging); or cocreated by providing direct input on the development of products or services (e.g., entering contests for design ideas or direct cocreation).

Incredibly, we found that 56% of people engaged in at least one activity over the course of the past year (figure 1). Though it’s unsurprising that most participation occurred at the lower end of the spectrum—32% participated in online

conversations about brands—deeper, higher-effort forms of engagement were also well represented.

Twenty-one percent gave online advice on products or services, 15% provided direct input on design, and 14% developed original content for a brand—all clear indicators of strong brand engagement, interest, and, in many cases, advocacy.

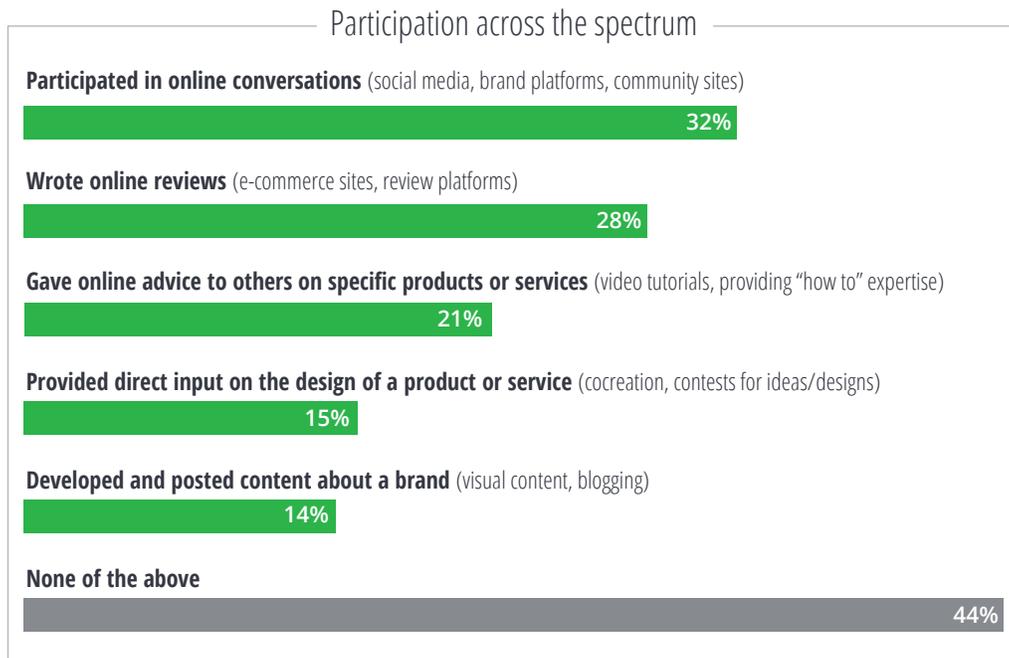
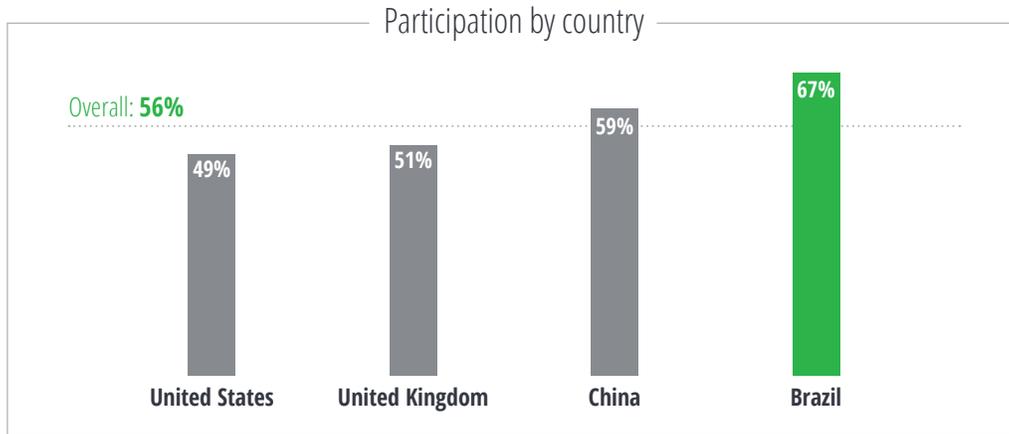
In the ensuing sections, we explore several trends related to participation: *Who* is participating across countries and age demographics, *where* are they doing it most often, and *what* motivates people to engage in deeper forms of participation. These insights can help marketers develop an engagement strategy that leans into participation.

Incredibly, we found that 56% of people engaged in at least one digital activity over the course of the past year.



FIGURE 1

Although Brazil led in participation in sheer numbers, China led in deeper forms of participation



Source: Deloitte Global Marketing Trends Participation Survey.

**Who's participating:
Global leaders**

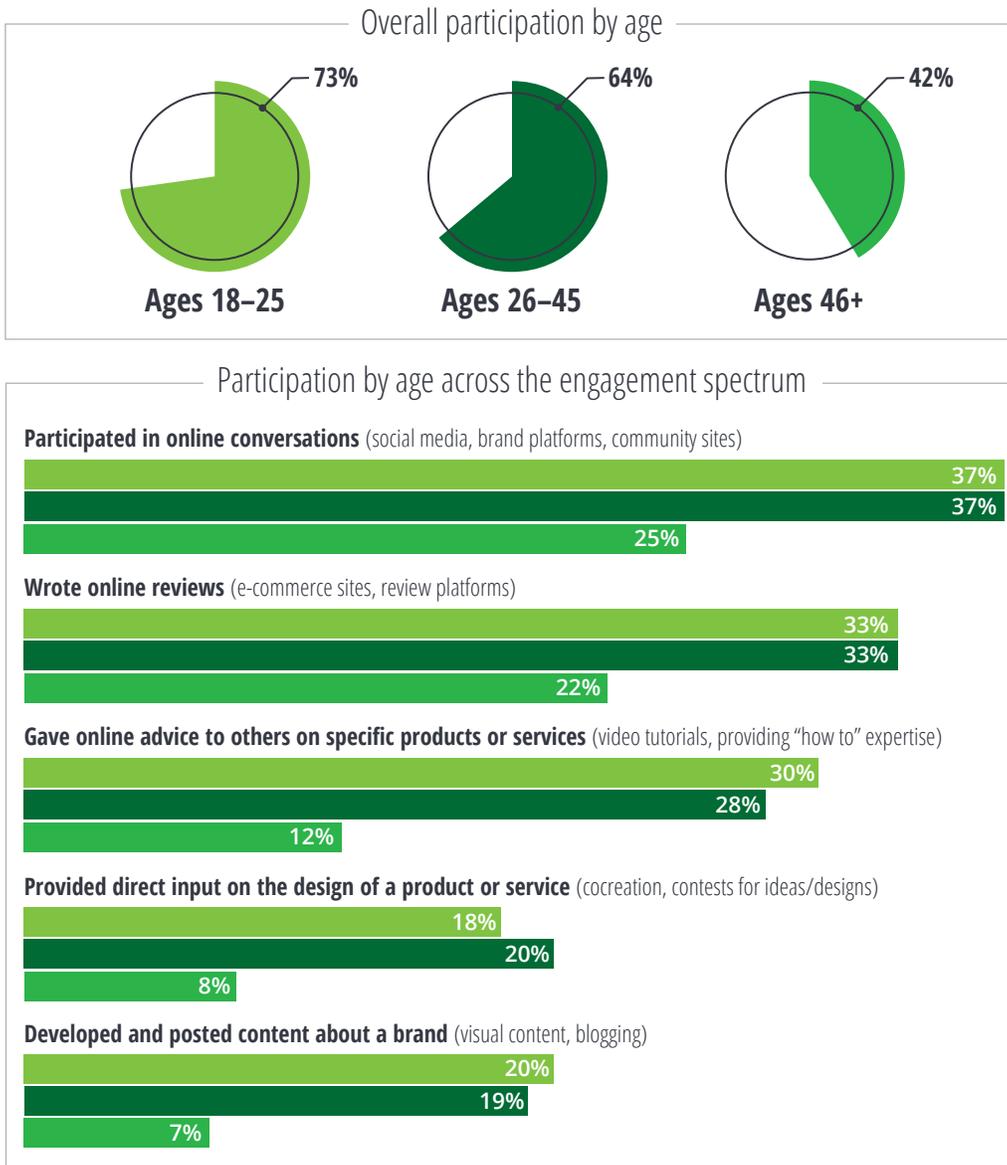
Of the four countries we surveyed, Brazil led the pack with 67% participating in some manner or the other. When we dug deeper, we found most of this

was driven by low-to-medium level activities, with 40% participating in online conversations, 36% writing reviews, and 33% giving advice to others.

China, while second in overall participation, led in its deepest forms, with nearly one in four people providing direct input on design and one in five

FIGURE 2

How participation changes with age



Source: Deloitte Global Marketing Trends Participation Survey.

developing original content for a brand. This isn't surprising as China has been ahead of the curve in pioneering the use of social media for customer engagement (see sidebar, “The social ecosystems of China” to learn more). For instance, Chinese platforms such as Little Red Book (Xiaohongshu) use social as both an e-commerce platform and, in

the case of participation, as a forum for customers to converse with *key opinion consumers*.² Unlike *key opinion leaders*, who often possess some level of fame, key opinion consumers are mostly regular people who have garnered a following because of their knowledge and/or expertise in a brand's products or services.

THE SOCIAL ECOSYSTEMS OF CHINA

In China, many leading brands are developing intricate social strategies that maximize engagement for both participation activities and customer types. For instance, some platforms are built to encourage people to upload video tutorials while others work like search engines that pair people with the most relevant key opinion consumers (e.g., Little Red Book). Among customer types, younger audiences are gravitating toward interactive platforms such as Bilibili while older individuals are likely to stick to “what they know.” In all cases, marketing leaders can proactively follow this blueprint to identify the role each platform can play in crafting their strategies.

Who’s participating: With age comes passion

As many may expect, younger generations interact most frequently with brands. Figure 2 shows while Generation Z (ages 18–25) participates in brands at a rate of 73%, the rate gradually declines to 42% for people over the age of 45. The gap especially increases for deeper forms of participation, with only 7% of people over age 45 developing original content versus nearly 20% of those who are 45 and younger.

We found age is highly correlated with passion and engagement. That is, the older the individual, the bigger the role passion plays in participation.

As we sought to understand *why* there are differences in participation by age, one theme stood out: *passion*. When we asked respondents if they engaged in these activities because they were passionate about a specific brand, product, or service, we found age is highly correlated with passion and engagement. That is, the older the individual, the bigger the role passion plays in

participation. Across all forms of engagement, Gen Z agreed that passion plays a role between 54% and 65% of the time. By comparison, those older than 25 said passion is relevant 76% to 85% of the time (figure 3).

Though it’s difficult to say definitively, this trend may be a reflection of the fact that Gen Z grew up in a digitally native environment while older generations had to actively learn how to navigate various technologies and forums for participation. Thus, for Gen Z, participation may simply be part of their core mindset and a natural behavior while older people may need the extra motivation of passion to engage with brands digitally.

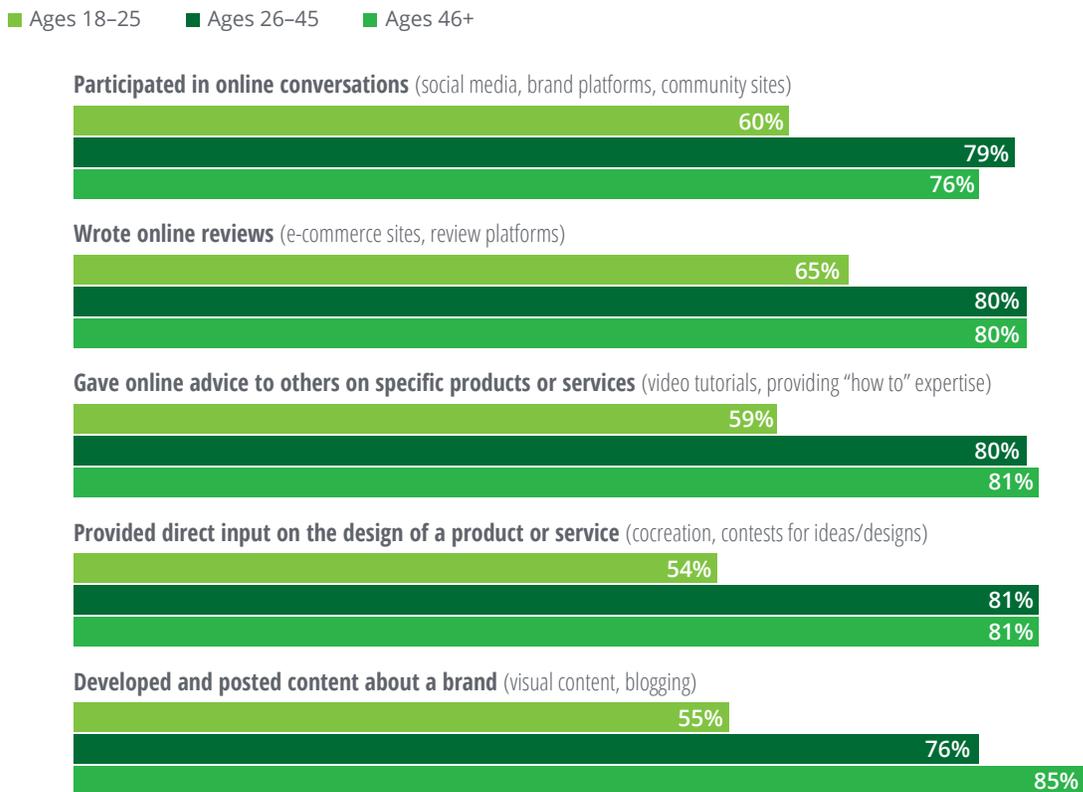
DeWalt, a global tools manufacturer, tapped into consumer passion by forming an insights community of 8,000 tradespeople and 4,000 do-it-yourselfers (DIYers).³ DeWalt provides individuals within this community with tools to test, say, during a home improvement project. The ask: customer feedback. DeWalt estimates this community has saved the company more than US\$6 million in R&D cost.

Participation frequency: The few but mighty

Industries that witness the most engagement are fairly consistent across the participation spectrum. Specifically, we see electronics, beauty and personal

FIGURE 3

Participation in those older than 25 is more driven by passion than it is in Gen Z



Note: These results are represented by those that agree passion played a role in each activity.

Source: Deloitte Global Marketing Trends Participation Survey.

care, health and wellness, apparel and footwear, and grocery and beverage consistently represented in the top five industries as far as participation is concerned. Their representation at the top is mostly intuitive as they see relatively frequent purchases whereas categories such as furniture and automobiles see less frequent buys. Interestingly, though, grocery and beverage, which are traditionally considered low-involvement purchases, is a top participation category for US consumers.

However, when people do participate in less-frequent purchase categories, they do so at a rate consistent with the higher-frequency purchase

industries. The BMW Group, for instance, has hosted virtual cocreation contests where hundreds of car enthusiasts have submitted innovation ideas for both interior and exterior design concepts.⁴

It is also encouraging to see that frequency of participation increases as one moves across the spectrum. In figure 4, we can see how this plays out—while 28% of those who participate in online conversations engage in the activity at least once a week, 37% provide direct input on design once a week or more. In essence, as people engage in deeper activities, they also participate in them more frequently.

As people engage in deeper activities, they also participate in them more frequently.



Motivations for participating: The desire to help

When we explored *why* people participate, an overwhelming trend rose to the fore: People are most motivated to participate in an effort to help others. Helping others regularly outranked other

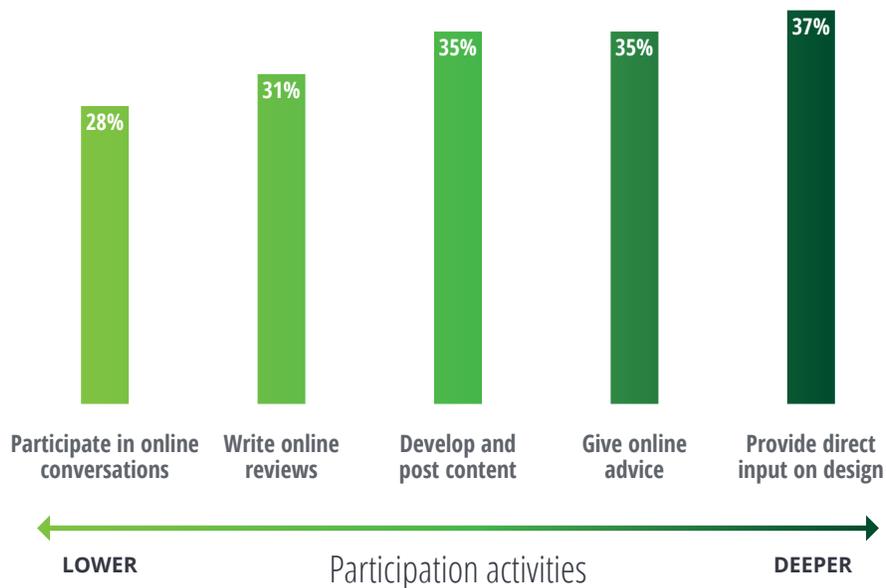
motivations such as “wanting to share something exciting,” “having expertise in a product or service,” or a “brand launching a new product.”

Perhaps most intriguing is the motivation that was consistently at the bottom: “Wanting to be recognized for my expertise.” Interestingly, there is

FIGURE 4

Participation frequency in deeper engagement activities is higher than in lower-level ones

Customers participating in an activity at least once a week



Source: Deloitte Global Marketing Trends Participation Survey.

one notable exception—China. As respondents in China moved to deeper forms of participation, recognition of one’s expertise rose to become the second-highest motivator, while helping others dropped to the fourth position. This could reflect the key opinion consumer culture we discussed earlier. Globally, the implication may be that as people are provided with more opportunities to participate, their motivations could evolve to more personal reasons.

Making participation part of your strategy

As participation moves across the spectrum to deeper forms of engagement, marketing leaders can weave these insights—*who’s* participating, *where* they’re participating the most, and what *motivates* them—into their marketing strategy.

Here’s what marketers should keep in mind while crafting a strategy that leans into customer participation:

- **Build a holistic participation plan:** It’s important to pinpoint where participation can be integrated into your engagement strategy—this means matching the customer journey to the optimal participation platform. For example, building awareness and consideration requires brands to promote community forums and/or

relevant blogs too. Or, at the other end of the customer journey, marketers may want to encourage people to develop their own video tutorials to drive conversions and repeat usage.

- **Create a deeper customer relationship:** While traditional loyalty approaches (e.g., customer relationship management systems and loyalty programs) are often a one-way street, participation is unique in its ability to interactively foster and nurture brand loyalty and customer advocacy. It enables brand interactions—and even innovations—to become a two-way conversation, effectively adding another layer to the customer relationship.
- **It’s more than just a B2C strategy:** B2B companies can kindle participation in a similar manner as their B2C peers. While B2C companies have always sought customer feedback, B2B companies can encourage deeper forms of participation as well. This can manifest in innovation labs where customers help cocreate new products and services or in brands encouraging customers to advocate on their behalf at conferences or through community forums.

Engagement is a two-way street and now marketers have more opportunities than ever to invite their customers to participate in—and bring life to—their strategy, products, and services.

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Acknowledgments

The author would like to thank **Grace Ling** (China) for her contribution to the development of this trend.

Recognition and appreciation

This report would not be possible without the collaboration that results from working alongside colleagues to understand the impact of these trends in the marketplace and how to embrace them to drive growth for organizations.

Special thanks to the entire CMO Program team for their insight and support through this journey.

Thank you to the following:

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- **Global program manager:** Anna Syrkis
- **Content and insights:** Sarah Allred, Timothy Murphy
- **Marketing and events:** Julie Murphy, Cailin Rocco, Julie Storer, Marissa Devine, Abhilash Yarala
- **Podcasts:** Fahad Ahmed
- **Public Relations:** Kori Green, Rory Mackin, Pia Basu
- **WSJ CMO Today:** Jenny Fisher, Mary Morrison
- **Green Dot Agency:** Emily Garbutt, Audrey Jackson, Mary-Kate Lamis, Emily Moreano, Stela Murat, Melissa O'Brien, Vishal Prajapati, Megha Priya, Joey Michelle Suing, Arun Thota, Molly Woodsworth, Sourabh Yaduvanshi, Sylvia Yoon Chang, Tushar Barman
- **Deloitte Insights team:** Prakriti Singhanian, Abrar Khan, Rupesh Bhat, Nairita Gangopadhyay, Amy Bergstrom, Nikita Garia, Preetha Devan

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