



2021 Global Marketing Trends

Find your focus

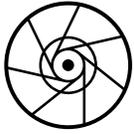
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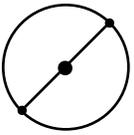
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Introduction

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

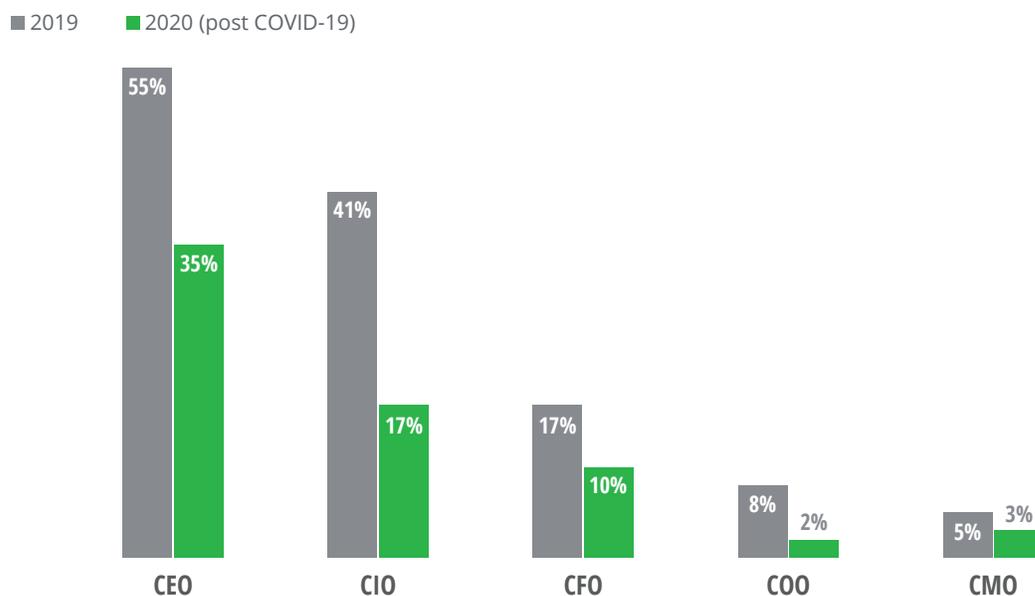
Of course, this isn’t unprecedented or unexpected behavior, but when we polled consumers, they showed us that as times get tougher, they expect more from the brands they frequent. Consider the following findings from our consumer survey:

- 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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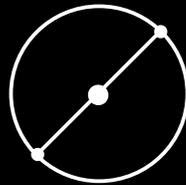
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Trust

To build trust in these turbulent times, brands should look at what people *value*—rather than what they *look like*—and ensure their promises are in sync with their competence to deliver on them.

The promises we keep—or don't

When messaging connects to delivery, trust flourishes

TRUST IS A highly contextualized conversation. In the C-suite, a CEO may see trust as delivering on the promise of bringing innovative products and services to the market. The chief information security officer (CISO) may view trust in terms of data transparency and cybersecurity, and the chief marketing officer (CMO) may think of it as brand messaging and experience. Outside of the C-suite, trust is contingent on what customers—and employees—value the most. But while the meaning of trust varies by audience, one thing is universally constant: *When delivery doesn't meet expectations, trust breaks down.*

COVID-19—like any other crisis—put the spotlight on the relationship between brand and trust. That is, a brand's reputation is determined by the connection between what is *promised* (i.e., messaging and advertising) and what is *delivered* (i.e., experiences). When the gap between promises made and what's delivered widens, trust erodes and the bottom line suffers.

How much can this hurt a brand? In April, we surveyed 2,447 people across eight countries to better understand how people perceived—and responded to—brands during the early days of COVID-19. As may be expected, people were highly attuned to the *negative actions* brands took during the pandemic, with 66% being able to recall when brands acted in their own self-interest (e.g., raising prices on essential items). Perhaps, though, the biggest loser was the bottom line as more than one-in-four respondents strongly agreed that such

actions spurred them to walk away from the brand in question.

With so many complexities, it's easy to see how brands can easily miss the mark while honing their messaging and delivering on promises. In an effort to help brands design messaging that resonates with their stakeholders—and authentically deliver on the promises made—we drew on some key insights from our research on trust and human values. In this article, we explore how:

- **Brands** can better *connect* promises with the products, services, and experiences they can competently deliver.
- The entire **C-suite** can breathe the mission of trust throughout the organization.
- **Marketers** can directly speak to—and address—the values of their customers, workforces, and business partners.

Closing the gap between what we say and what we do

People may *think* highly of your brand, but that doesn't necessarily predict *future behaviors*, such as remaining loyal to or promoting a brand. There are, however, some signals marketers can build into their messaging and actions to measure this relationship and nudge future customer and employee behavior. Earlier this year, we surveyed 3,000 customers and 4,500 employees in the United States to better understand the link between trust and decision-making.¹

Through multivariate analysis, we identified four signals—*humanity*, *transparency*, *capability*, and *reliability*—that measure trust and, more importantly, influence future behavior (see sidebar, “The HX TrustID” to learn more).

Humanity and transparency reflect a brand’s intentions while capability and reliability demonstrate its competency in fulfilling those intentions. For marketers seeking to build and strengthen brand reputation, this can be translated into messaging (intentions) and delivery (competence). Brand messaging should maintain *transparency* in its intentions and reflect its humanity. At the same time, the delivery of its experiences and products needs to be consistently *reliable* and *capable* of doing what is promised.

By isolating each of these signals and reviewing how they’re incorporating them into their messaging and actions, brands can better identify where they are operating with trust and which areas they need to improve upon.

We’ve seen in our research that 82% of customers are more likely to visit businesses that ensure the safety and well-being of their employees, and 31% say this is imperative to earn their repeat business (highest of all customer priorities).² As such, if brands promise that individual well-being is a priority but make employees work in unsafe environments, there will naturally be a gap between stated intentions and competence. Patagonia, an international outdoor apparel brand, has taken significant measures to transparently tie its promise of ethical supply chains—and worker conditions—with the delivery of its end products.³ With this in mind, every product that is showcased directly links back to a “Footprint Chronicle” which explains in detail how and where the product was made across the supply chain.

Making trust matter for everyone

At the onset, we noted how trust can mean different things to different stakeholders. As such, ensuring that a brand’s intentions and competence are aligned takes more than just a good creative strategy. It requires a holistic *trust strategy* that consistently elevates the human experience for the brand’s customers, employees, and business partners. For marketers trying to weave multiple dimensions of trust into a single message, this means zooming out and taking an enterprisewide view of the brand and how it can fully deliver on trust (see our trend on [Purpose](#) to learn more).

Building trust requires a coordinated effort between a number of key functions.

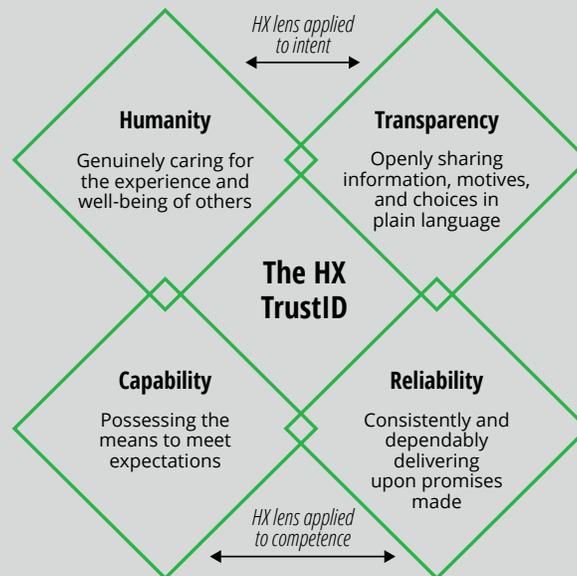
Building trust requires a coordinated effort between a number of key functions, including product development, information security, talent, and marketing strategy, among others. However, this can be challenging as different functions and roles are responsible for different activities across the enterprise (figure 1). While some areas, such as marketing strategy, have a clear owner, others such as product road map and corporate culture are more democratized across the C-suite.

Some companies are addressing this fragmented trust environment by establishing new roles that better encompass the multiple facets of trust. For instance, Forcepoint, a cybersecurity company, recently created a chief strategy and trust officer role.⁴ In organizations such as WW (formerly Weight Watchers), the chief people officer is responsible for delivering on all parts of the

THE HX TRUSTID

When we launched our research study to better understand how trust influences behavior (referred to as the HX TrustID), we found strong correlations between the four signals—humanity, transparency, capability, and reliability—and customer and employee behavior.⁵

The graphic below shows that when trust is viewed through the human experience (HX) lens, humanity and transparency reflect intent while capability and reliability demonstrate competence.



From the original article, we provide a few examples of how trust can lead to powerful business outcomes when brands demonstrate these signals.

When brands demonstrate humanity:

- Customers are 1.6 times more likely to purchase from the brand over competitors
- Employees are 2.6 times more likely to feel motivated at work

When brands demonstrate transparency in their intentions:

- Customers are 2.8 times more likely to continue purchasing from the brand after a data breach
- Employees are 1.7 times more likely to be satisfied with their compensation

When people believe a brand possesses the capability of delivering on its promises:

- Customers are 2.4 times more likely to be repeat purchasers
- Employees are 2.4 times more likely to show up to work on time

When brands are routinely reliable:

- Customers are 2 times more likely to recommend the brand to a friend
- Employees are 1.7 times more likely to positively review their company on social media

To learn more about the HX TrustID and the methodology behind it, [click here](#).

employee experience.⁶ Both cases represent a shift in mindset based on the acknowledgment that trust is an organizationwide issue and requires executive-level coordination.

Shifting the focus from demographics to *values*

Most marketers don't seem to have a significant impact on aspects of the business outside of their traditional role (figure 1). However, there is a better way in which marketers can galvanize the entire organization around a single mission of trust—by focusing on the *values* that matter to the customer and employee.

Historically, marketing has considered demographics such as location, age, and gender as key inputs while segmenting audiences and crafting messages that (hopefully) resonate with the customer. But demographics are really a “best guess” method of meeting people’s needs and spurring action—they are, at best, a proxy for how

the customer may behave or what they value. On the contrary, by speaking directly to what people value, marketers can inform the entire organization of a more meaningful way of addressing the needs of the people they are built to serve.

In our “**Value Compass**” research, we found that pivoting from segmenting based on what people *look* like to what they *value* creates a stronger link to customer behavior.⁷ Why is that? Our values inform our feelings and, consequently, our actions. That is, when a brand connects on a humane, empathic level, people are more open to trusting its intentions and believing that their needs are truly being addressed. Further, by understanding people’s values, brands can ensure that the promises they make actually align to what their audiences care about most (i.e., a signal that your brand understands its stakeholders’ values).

The Value Compass research also shows that at the highest levels, almost everyone aligns to some combination of eight cardinal values: ambition, trying new things, curiosity, sharing with others,

FIGURE 1

Where executives indicated they have a significant impact in the C-suite

	Average	CEO	CFO	CIO/CTO	CMO	CHRO	COO
Competitive landscape/disruption	20%	38%	17%	22%	17%	14%	10%
Customer experience	39%	44%	36%	46%	29%	27%	52%
Marketing strategy	40%	53%	30%	39%	81%	11%	21%
Mergers & acquisitions	20%	36%	29%	20%	9%	17%	7%
New markets	36%	52%	25%	20%	67%	17%	38%
Digital transformation	33%	36%	32%	65%	22%	10%	34%
Performance: Financial indicators	28%	44%	70%	28%	12%	10%	7%
Performance: Other success indicators	32%	42%	29%	29%	20%	35%	34%
Product road map (e.g., R&D)	40%	48%	48%	35%	39%	18%	56%
Security/risk management	33%	47%	29%	52%	23%	11%	34%
Talent acquisition or corporate culture	31%	47%	14%	20%	19%	68%	18%

Source: Deloitte Global Marketing Trends C-suite Survey.

belonging, caring for others, control, and learning new things.

By starting here, we can identify universal needs and behaviors. For instance, insights from a recent study conducted during COVID-19—*Respond, recover, and thrive: Aligning with human values*—found one of these eight values—control—moved to the forefront of people's minds as the pandemic spread.⁸ Across population



When a brand connects on a humane, empathic level, people are more open to trusting its intentions and believing that their needs are truly being addressed.

demographics, control, as a core value, increased in importance by 31%.

Now, let's consider how it's playing out in a particular segment—frequent travelers. Many hotels that have taken note of the rise in the need for “control” among customers are bolstering their apps to allow guests greater control over their stays, and in a contactless environment.⁹ Or at the organizational level, Delta Air Lines created an entirely new Global Cleanliness division within its Customer Experience organization to reimagine its cleanliness standards.¹⁰ Headed by a vice president of cleanliness, Delta worked with outside health experts to develop the Delta “CareStandards.” For passengers, CareStandards brought new solutions

to market; for example, “care kits” that help Delta travelers feel at ease and confident that their safety is taken seriously. And, as importantly, CareStandards has already helped increase employee protection as the number of Delta employees testing positive for COVID-19 is “well below the national average.”

Bringing it back to the power of tying promises to delivery, Delta started by understanding what their stakeholders value, transparently messaged how they are addressing those values, and embedded multiple delivery touchpoints throughout their processes to ensure cleanliness and safety for customers and employees.

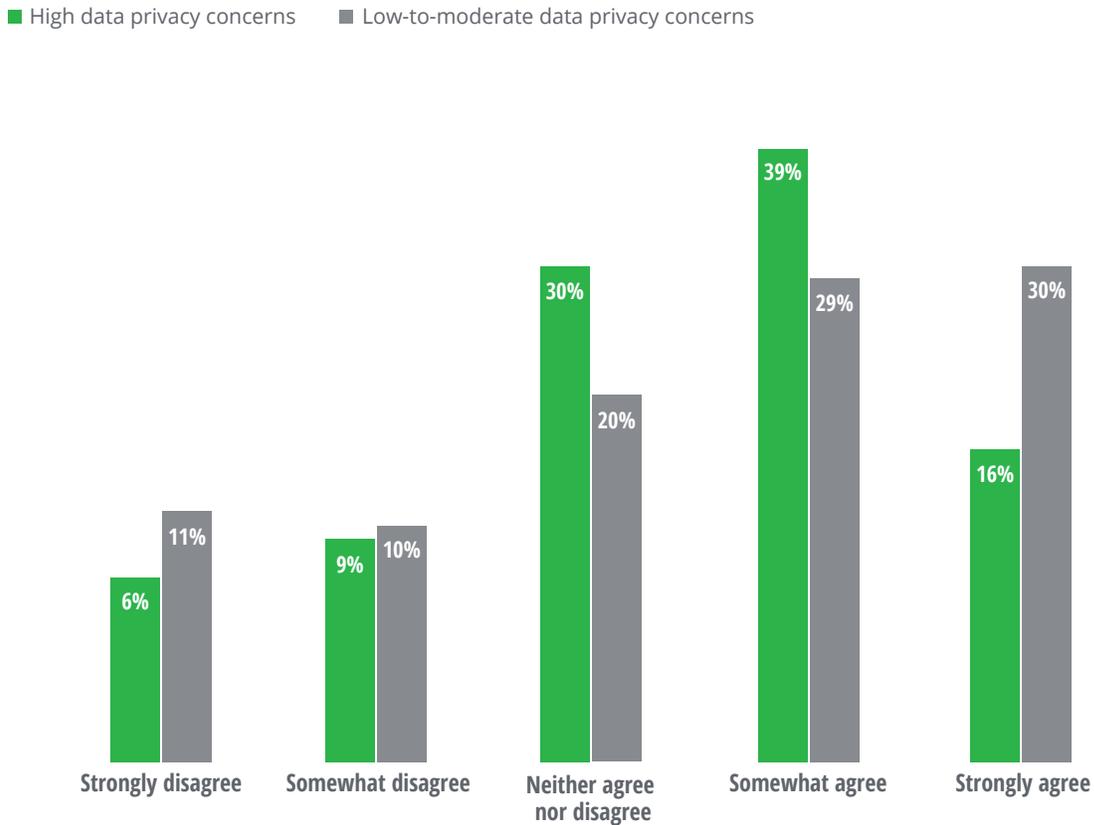
Such values-based segmentation can get even more granular. Consider people’s willingness (or the lack of it) to share their data with an organization. In our COVID-19 consumer survey, 21% strongly agreed they were willing to share their data with businesses to help respond to the pandemic. One would expect this number to be lower for those who usually have a high level of concerns around sharing personal data. Yet, figure 2 shows that those most highly concerned about data privacy are also the ones most willing to share their data with businesses to respond to COVID-19—30%

versus 16% for those not as concerned about data privacy.

Why is that? It turns out that those who are most highly concerned about sharing data put a premium on data transparency (67% for those with high data privacy concerns versus 37%) and believe that businesses should use this data in an ethical manner (72% versus 39% for everyone else). In this specific case, it’s not about how people *generally* behave; it’s about uncovering what’s important to them in these times—and others—and speaking to those values directly.

FIGURE 2

Those most concerned about data privacy are also most willing to share their data to respond to the pandemic



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

Building trust

To be able to deliver on their promises and meet customers' evolving value-based needs, brands need to align their intentions with their actions (or competency). And all members of the C-suite—not just the CMO—need to come together to bring about this alignment. Here are some steps leadership can take in this direction:

- Don't stay in your lane: While clear functional owners exist in most organizations, trust requires collaboration across the C-suite. This means developing cross-functional teams that align on trust-related KPIs, assigning ownership for those KPIs, and developing a road map for closing the gap between intentions and competency.
- Choose your trust competencies wisely: How you demonstrate trust may be conditional on

your organizational goals. If, for example, your customers value transparent and ethical data usage, it may be important to incorporate straightforward messaging on how your organization will use their data and ensure systems are in place to protect that data from both cyber risks and invasive data practices.

- Expand the marketer's toolkit: It's hard to deliver on trust when the marketing department mirrors the skills of an ad agency. Delivering holistically on trust requires a wide-ranging collection of skill sets, including expertise in product development, analytics, and a deep understanding of revenue models.

Trust is the gap between messaging and delivery. The good news: Organizations now have the tools to close that gap, and in the process, create something people wholeheartedly trust to deliver upon their needs.

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