



2021 Global Marketing Trends

Find your focus

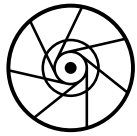
About the Deloitte CMO Program

Deloitte's CMO Program supports CMOs as they navigate the complexities of the role, anticipate upcoming market trends, and respond to challenges with agile marketing.

[Read more on the latest marketing trends and insights.](#)

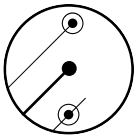
Digital technology has changed the face of business. Across the globe, Deloitte Digital helps clients see what's possible, identify what's valuable, and deliver on it by combining creative and digital capabilities with advertising agency prowess and the technical experience, deep business strategy, and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

Contents



Introduction

2



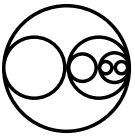
Purpose: Built to flourish

6



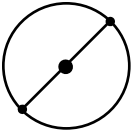
Agility: Changing the playbook

16



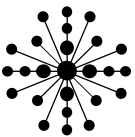
Human Experience: Know thyself

24



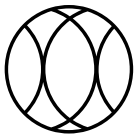
Trust: The promises we keep—or don't

34



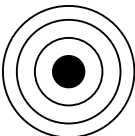
Participation: A two-way street

44



Fusion: The new ecosystem

54



Talent: Marketing disrupted

64

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

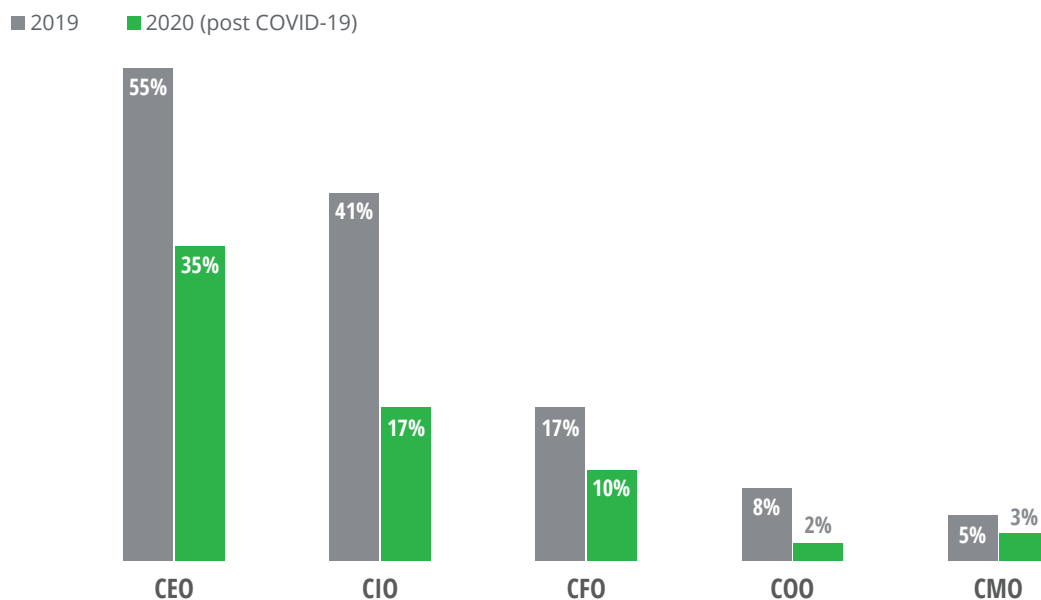
Of course, this isn’t unprecedented or unexpected behavior, but when we polled consumers, they showed us that as times get tougher, they expect more from the brands they frequent. Consider the following findings from our consumer survey:

- 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.

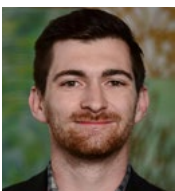
Endnotes

1. David Cassel, "How technology helped us through the 1918 flu pandemic," New Stack, April 12, 2020.
2. Jessie Kratz, "Vietnam: The first television war," U.S. National Archives, January 25, 2018.
3. Dimple Agarwal et al., *The rise of the social enterprise: 2018 Deloitte Global Human Capital Trends*, Deloitte Insights, 2018.
4. Diana O'Brien, Jennifer Veenstra, and Timothy Murphy, *The makings of a more confident CMO: Three ways to increase C-suite impact*, Deloitte Insights, September 18, 2020.

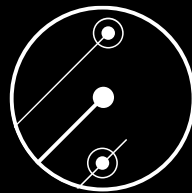
About the authors



Jennifer Veenstra is the managing director of Deloitte's Global CMO Program. She focuses on CMO leadership, especially around the client experience, driving strategy, and digital transformation. She works across multiple industry areas to help CMOs in delivering enterprise growth and connecting with customers around purpose. She has led the transformation of the Deloitte Client Experience.



Timothy Murphy is the director of research and insights for Deloitte's CMO Program. As a researcher and analytical scientist with Deloitte Services LP, he focuses on emerging marketing trends and CMO dynamics within the C-suite.



Purpose

Organizations that know *why* they exist and *who* they're built to serve are uniquely positioned to navigate unprecedented change.

Built to flourish

Navigating an ever-changing world through the purpose-driven enterprise

THE WORLD HAS been through one of the worst crises of this century—the coronavirus pandemic—and is just beginning to pick up the pieces and rebuild itself socially and economically. As COVID-19 took its economic and emotional toll on the world, businesses were—and still are—faced with myriad uncertainties. How do organizations navigate a reality where their products and services may no longer have the same standing as they did prior to the outbreak? For some, it may be a question of how to connect with their communities when storefronts are shuttered, or, in terms of talent, how to support workforces on the frontlines as well as those confined to their homes.

Purpose-driven companies inherently understand *why* they exist and *who* they are best built to serve regardless of what they sell today.

While most brands are mulling over how to reposition themselves and best serve their

stakeholders, some are positioned to remain steadfast in one key dimension—their **purpose**. These companies inherently understand *why* they exist and *who* they are best built to serve—from their customers and workforces to the community—regardless of what they sell today.

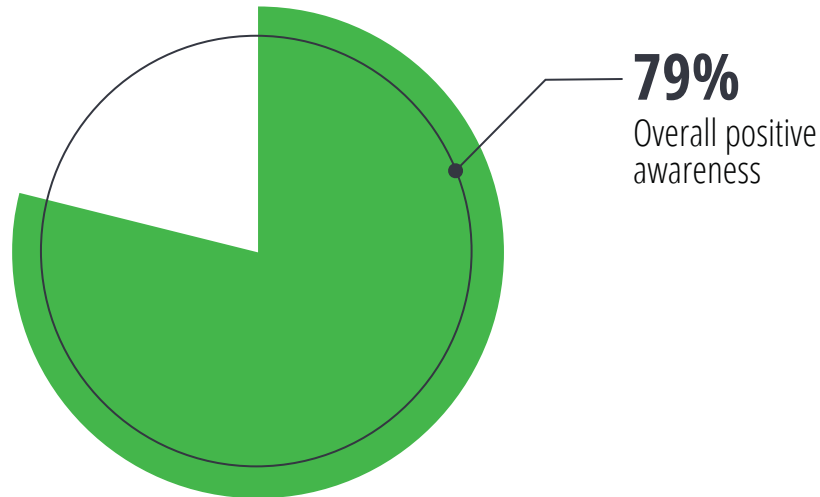
Promisingly, people are taking note of these brands. In Deloitte’s survey of 2,447 global consumers, 79% of respondents recalled instances of brands positively responding to COVID-19 to help their customers, workforces, and communities (figure 1). We saw this manifest in countless ways: financial institutions pausing overdraft fees and deferring loan payments; shoe companies donating

thousands of pairs of shoes to nurses healing their communities; and many companies shifting their long-standing corporate policies to better support the workforces that drive their business.

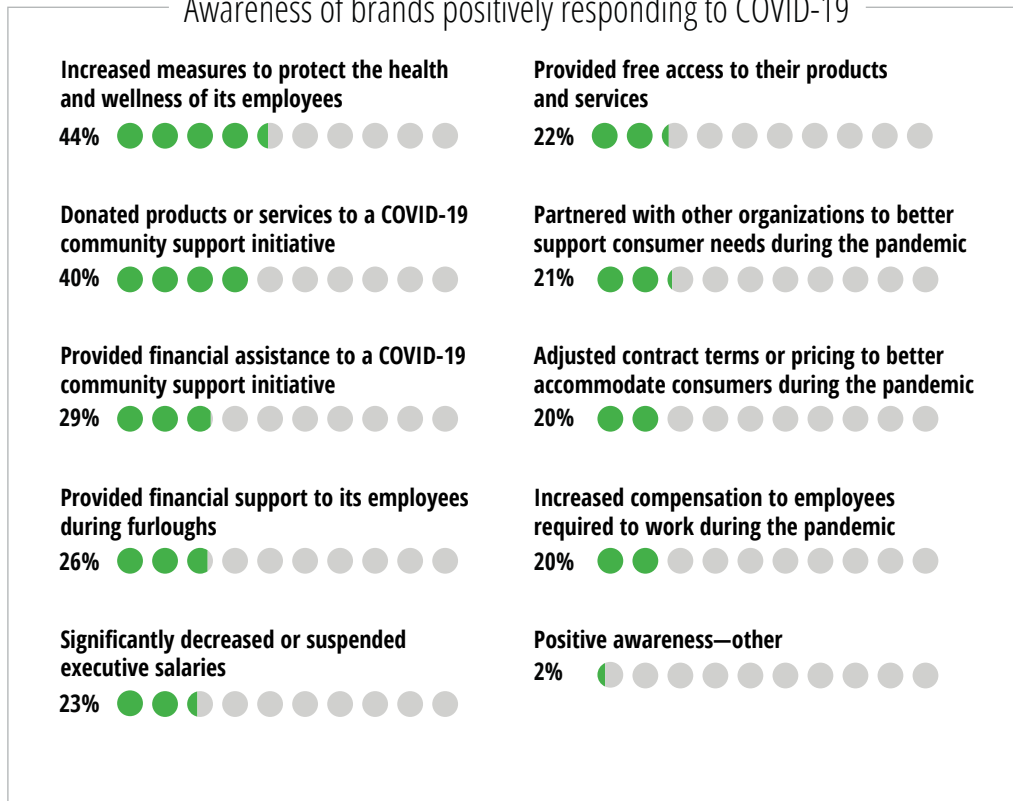
When an organization’s crisis responses are driven by a holistic purpose—connecting a business’s role in society to its long-term value—there is a clear alignment between its brand identity and a sustained commitment to all stakeholders—including customers, employees, suppliers, and communities, in addition to shareholders.

FIGURE 1

Since the COVID-19 pandemic, are you aware of any brands that redirected profits in any of the following ways?



Awareness of brands positively responding to COVID-19



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

We call these *purpose-driven enterprises*. Guided by an authentic, enterprisewide purpose, these organizations turn tough decisions into simple choices—following the path that best embodies their purpose. Purpose-driven enterprises are not only garnering more attention but also spurring consumer action. Nearly one out of four respondents strongly agreed that these actions positively shifted brand perceptions and one in five strongly agreed that it shifted their buying preferences in favor of the brand (figure 2). Conversely, we saw that *sustained commitment* matters as consumers were also well aware of negative brand actions (66%) that led to one in four consumers walking away from the brand. The takeaway: Organizations can't pick and choose when they lean on their purpose. Rather, it's a long-term commitment that guides how an organization exists. In the absence of this commitment, public trust can quickly erode (see our trend on [Trust](#) to learn more).

What does it take for an organization to operate as a purpose-driven enterprise? It typically requires a deep understanding of *why* the organization exists, widening the aperture on *who* it is built to serve, and ensuring it follows through on its promises with purpose-driven KPIs. In this article, we look to demystify what being a purpose-driven enterprise *really* means and how marketers can elevate their purpose to encompass all their stakeholders—in good times and bad.

Demystifying purpose

The ever-evolving dialogue around *purpose* has led to multiple interpretations of the term, coalescing the definition of purpose into a moving target. Purpose can represent the underlying motive behind why a brand sells its products and services, or it can be the platform that articulates why the organization exists in the world. In an effort to

FIGURE 2

The customer funnel from awareness to purchase behavior



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

demystify purpose, we refer to the former as *brand purpose*, as it is anchored in the consumer; while the latter refers to a *purpose-driven enterprise*, intended to address the needs of all its stakeholders. Regardless of the endeavor, most purpose-led brands and organizations require clarity in motive and a means of holding themselves accountable to the promises they make.

HOW A BIGGER “WHY” EXTENDS THE REACH OF THE ENTERPRISE

Brand purpose and the purpose-driven enterprise don’t have to be mutually exclusive endeavors. In fact, a purpose-driven enterprise aligns its brand purpose to a bigger *enterprisewide purpose*. However, in many cases, the “why” behind an organization’s products and services is siloed from other important facets, such as talent and business partnership strategy.

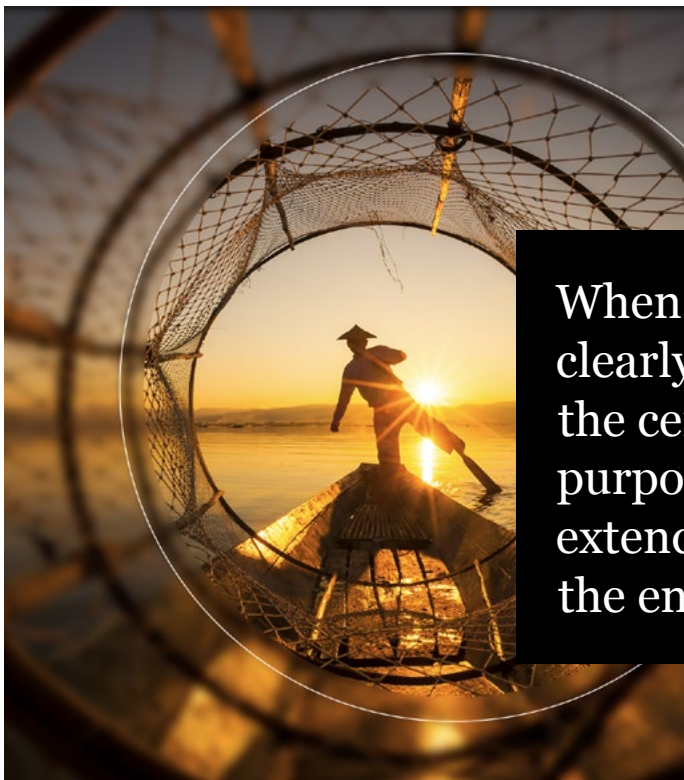
When purpose is managed in siloes, its meaning can be confused or, at worst, it can appear disingenuous. But when an enterprise clearly puts

its “why” at the center of its operations, purpose can be amplified and extended both within and outside the enterprise.

Consider one such purpose-driven enterprise—Ella’s Kitchen. The maker of organic baby and toddler food wants to “create healthy eating habits that will last a lifetime.”¹ Ella’s Kitchen’s intent is to live out this purpose by going beyond simply selling food. In line with this, it applies its “good to each other” standards and works with myriad stakeholders to ensure an ethically sourced supply chain. Besides using healthy ingredients in its products, it also provides parents and caregivers resources to help them develop healthy eating habits in their children.²

Ella’s Kitchen also galvanizes its corporate social responsibility (CSR) initiatives by donating more than 300,000 food pouches to underserved children across the world.³ For clarity, CSR initiatives are not synonymous with a purpose-driven enterprise.

Rather, organizations with an enterprisewide purpose work to ensure that their CSR activities reinforce their purpose and their ability to positively impact the world (see sidebar, “Elevating the social enterprise”).



When an enterprise clearly puts its “why” at the center of its operations, purpose is amplified and extended within and outside the enterprise.

ELEVATING THE SOCIAL ENTERPRISE

Countless brands have existed for decades—and financially flourished as well—even without a purpose that ties directly to societal good. However, two global trends suggest organizations can do better than “well” by ensuring their enterprise purpose and ensuing CSR initiatives are focused on making the world a better place. These trends are:

- **The world is shifting to the social enterprise:** The social enterprise’s mission combines profit with societal impact. We see businesses trending in this direction as CEOs most often cite “impact on society, including income inequality, diversity, and the environment” as their most important success measure.⁴ It’s not just CEOs either—millennials and Generation Z are most likely to support companies that share their values and walk away from those that don’t hold themselves accountable to these values.⁵
- **The world is looking to businesses for solutions:** According to the Edelman Trust Barometer, which surveyed 34,000 individuals in 28 global markets, people see businesses as the most competent group to solve global issues, even more so than nonprofits and governments.⁶ Notably, respondents suggested that stakeholders including communities, consumers, and talent are most important to an organization’s long-term success (only 13% noted shareholders as the most important stakeholder).

Increasingly, “brand” represents how people perceive the organization, and consumers are gravitating toward enterprises that support socially important endeavors. Keeping this in mind, organizations should infuse a societal dimension to purpose throughout the enterprise to effectively answer the call of stakeholders.

Measurement: Staying true to promises made

Our news feeds are peppered with examples of businesses falling short of their grandiose promises. It’s easy to put something on paper but takes considerably more effort to authentically live out those words. Whether it’s a brand upholding its promises to its customers or an enterprise demonstrating its purpose across the value chain, organizations can benefit from promoting KPIs that ensure they are living out their purpose across three key dimensions:

Ingraining measurement in policies:

Organizations can establish measurable policies across the enterprise that bolster their purpose through key practices. Take United States–based investment management company BlackRock, for instance. BlackRock CEO Larry Fink once notably said that purpose and profits are closely linked and, as such, require policies that align fundamental

business decisions with purpose.⁷ In line with this, BlackRock requests “robust” disclosures from companies regarding how they are adhering to the industry-specific guidelines provided by the Sustainability Accounting Standards Board (SASB).⁸ For those who fall short in these disclosures, BlackRock will “increasingly conclude that companies are not adequately managing risk.”⁹ Following these standards, BlackRock “voted against or withheld votes from 4,800 directors at 2,700 different companies” where there was a lack of sustainability disclosures.¹⁰

KPIs for teams: To truly live out a purpose, the workforce needs to live and breathe its values and mission. For instance, Alaska Airlines employs annual engagement surveys to better understand how its employees perceive the company and engage in living out its purpose.¹¹ In 2020, its goal is to ensure engagement scores are 80% or higher across company divisions. Organizations can build on this method by reporting to boards how these

engagement scores are trending over time while simultaneously ensuring that purpose-related conversations are a foundational part of performance reviews.

Linking profit to purpose: If profit and purpose are linked, organizations should measure purpose-driven outputs to demonstrate the value of adhering to a purpose. Further, success helps secure buy-in and provides a line of sight into what's working for the organization. For example, Unilever's enterprise purpose is "to make sustainable living commonplace."¹² Living this purpose, Unilever measures the performance of its sustainable living products versus the rest of its product portfolio. The results: "Sustainable Living Brands are growing 69% faster than the rest of the business and delivering 75% of the company's growth."¹³

How marketers can bring purpose to the forefront of the enterprise—for the long run

A purpose-driven enterprise can require multiple facets of the organization to work in concert. However, we recognize that not all businesses start from the same place as far as purpose is concerned. Start-ups can integrate purpose into their operations from the ground up, whereas large, legacy companies have a steeper hill to climb as they pivot to more purpose-driven endeavors. *How* marketers can weave purpose throughout the enterprise varies depending on the organization's maturity and industry.

Regardless of organizational maturity and the industry, CMOs and their marketing organizations can take three steps to bring purpose to life for

their consumers and, in time, all enterprise stakeholders. They are:

- 1. Own brand purpose:** As marketers are traditionally regarded as customer experts,¹⁴ they are uniquely positioned to understand and articulate the higher order "why" behind the brand's products and services. Bringing the "why" to brand purpose can unlock creativity, inspire employees, and create differentiation by building an emotional connection with consumers. Marvin, a window and door company, shows how marketers can turn their products into a higher-level purpose. Their purpose: "To imagine and create better ways of living."¹⁵ Through its brand purpose, Marvin articulates how it can take a seemingly straightforward product, like a window or door, and help people see this purchase as a way to live a happier and healthier life in their homes. This can be through innovative technology, such as hidden lock sensors and smart skylights, or the ability to fine tune every design detail to help customers build spaces that best reflect their individual personalities, wants, and needs.

How marketers can weave purpose throughout the enterprise varies depending on the organization's maturity and industry.

- 2. Catalyze the enterprise purpose:** If the organization is not currently thinking about enterprise purpose, marketers can catalyze the

conversation by bringing an “outside-in” perspective to C-suite conversations. This may mean speaking to corporate reputation or bringing data to the table that sheds light on current perceptions of the company relative to the competition.

As noted in our consumer pulsing research (figure 1), consumers are most aware of brands that responded to COVID-19 by protecting employees (44%) and donating products to support a COVID-19 community support initiative (40%). Ethias, a large insurer in Belgium, did exactly this when the pandemic first hit. Wilfried Neven, the chief digital transformation officer of Ethias, said they quickly developed three phases of response: “First, protect the employees; second protect the clients; and third, overall, protect the company.”¹⁶ Beyond moving employees to remote work, Ethias stood up digital messaging campaigns to check in on employee well-being. And to assist the community, Ethias employees combined their digital expertise with their insurance ecosystem to develop a COVID-19 volunteer network through their App4You platform. This platform matched volunteers with community needs—while providing free insurance to the volunteers providing service. In doing so, Ethias was able to expand its core mission and purpose across the enterprise—and beyond the traditional customer base.

3. Fuse brand and enterprise purpose

where appropriate: Are an organization’s CSR initiatives a major reason its consumers are loyal to its brand? If yes, marketers can work directly with public relations to help ensure that the messaging for the brand and enterprise purposes is congruent. If not, marketers can work with the CSR team to strengthen the enterprise’s voice in the marketplace.

Consider Expensify, a corporate credit card and expense reporting company. Expensify started with the strong brand purpose of giving busy professionals some time back by making expense reporting fast and easy.¹⁷ As the company grew in popularity, it was able to build a larger enterprisewide purpose. Expensify now donates 10% of its card revenue to societal initiatives addressing homelessness, child hunger, and climate change. When someone books a hotel on its platform, Expensify donates to causes addressing homelessness, and when someone buys a plane ticket, it helps plant trees to reduce carbon emissions. Expensify has a strong brand purpose that directs its CSR initiatives.

The COVID-19 pandemic has shown us that companies which know “why” they serve their stakeholders are uniquely positioned to navigate unprecedented change. When purpose is embedded across the entire enterprise, organizations can live it out across the value chain to fulfill the hopes of their stakeholders, and possibly, change the world.

Endnotes

1. Ella's Kitchen, "Our mission + values," accessed August 6, 2020.
2. Ella's Kitchen "Our dream," accessed August 6, 2020.
3. Ella's Kitchen, *The good stuff we do*, 2019.
4. Erica Volini et al., *Introduction: Leading the social enterprise—Reinvent with a human focus: 2019 Global Human Capital Trends*, Deloitte Insights, April 11, 2019.
5. Michele Parmelee, *The Deloitte Global Millennial Survey 2020: Highlights—In the midst of crisis, younger generations show resilience*, Deloitte Insights, June 25, 2020.
6. "Edelman Trust Barometer 2020," presented at the Points of Light: Corporate Services Council, February 5, 2020.
7. BlackRock, "Larry Fink's 2019 letter to CEOs," 2019.
8. BlackRock, "A fundamental reshaping of finance," accessed April 29, 2020.
9. Ibid.
10. Ibid.
11. Alaska Airlines, *2016 sustainability report: Focusing on people*, 2016.
12. Unilever, *Our sustainable living report*, accessed April 29, 2020.
13. Unilever, "Unilever, purpose-led brands outperform," accessed April 29, 2020.
14. Diana O'Brien, Jennifer Veenstra, and Timothy Murphy, *The making of a more confident CMO: Three ways to increase C-suite impact*, Deloitte Insights, September 18, 2019.
15. Marvin, "Our story: Advancing with purpose," accessed June 2, 2020.
16. Wilfried Neven (chief digital transformation officer, marketing function), interview with the author.
17. First reported by Amanda Gregory, "Three great examples of brand purpose," Catalyst Marketing, April 16, 2019 and elaborated on Expensify's "Who we are: How we got here," accessed March 26, 2020.

About the authors



Suzanne Kounkel is the chief marketing officer of Deloitte and Deloitte Consulting LLP. She pushes the bounds of creativity and collaboration in pursuit of two intertwined goals: happy clients and healthy business growth. A principal in Deloitte Consulting LLP, Kounkel is a frequent speaker and published author on purpose-driven brand, elevating the human experience within B2B marketing, and the ethical use of data within marketing.



Amy Silverstein leads Deloitte's Purpose Strategy offering, a unique collaboration across the Monitor Institute and Monitor Deloitte Strategy. A leader within the Monitor Institute by Deloitte LLP, she advises organizations to develop, operationalize, measure, and communicate their purpose including Environmental, Social, and Governance (ESG) strategies and linking purpose to core enterprise strategy to accelerate commercial growth, manage risk, and advance societal impact. Silverstein is a frequent speaker and author on the topic of social purpose for value creation, the role of business in society, and the future of CSR.



Kathleen Peeters leads the Marketing and Commerce Practice in Belgium, where her professional motivation involves helping companies leverage the full potential of their business by making meaningful connections with their customers and transforming their marketing. A director with Deloitte Consulting LLP, she has led multiple transformation projects focused on maximizing the value of marketing technology and data to help the clients' business grow. Peeters is a marketing and communication executive with broad experience in digital marketing, Data & BI, CRM, CDP, strategy, marketing automation and marketing operations.



Agility

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

Changing the playbook

Agile marketing for our increasingly digital world

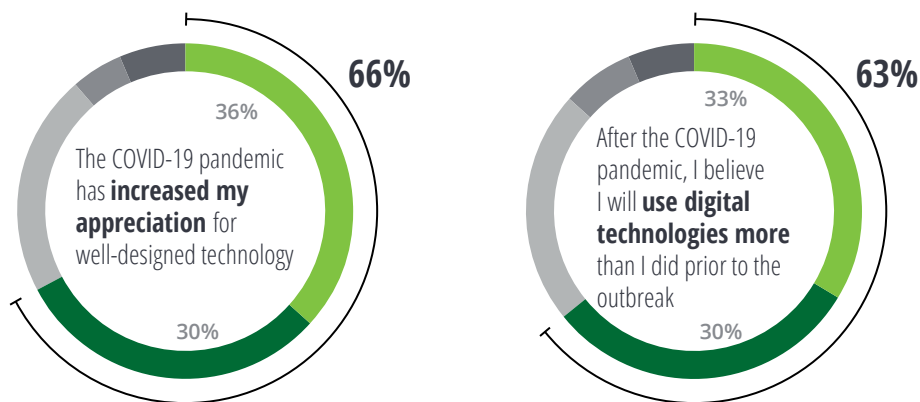
FOR DECADES, THE recession playbook remained mostly unchanged: Either retrench, focus on costs, and ride out the downturn, or spend ahead of demand with a view to capturing market share. However, the current pandemic-triggered recession is unique in that it has forced massive, rapid changes in consumer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

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

FIGURE 1

Consumer sentiment change toward digital technologies due to COVID-19

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



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

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

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

Three trends that help make agile marketing a reality

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

HAVING A CLEAR PICTURE OF THE MARKET

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

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

BE THE SIGNAL, NOT THE NOISE

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

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

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

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

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



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

ANTICIPATING THE CONVERSATION

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

artificial intelligence) makes this possible for many organizations.

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

EMBRACING SOCIAL CRM

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

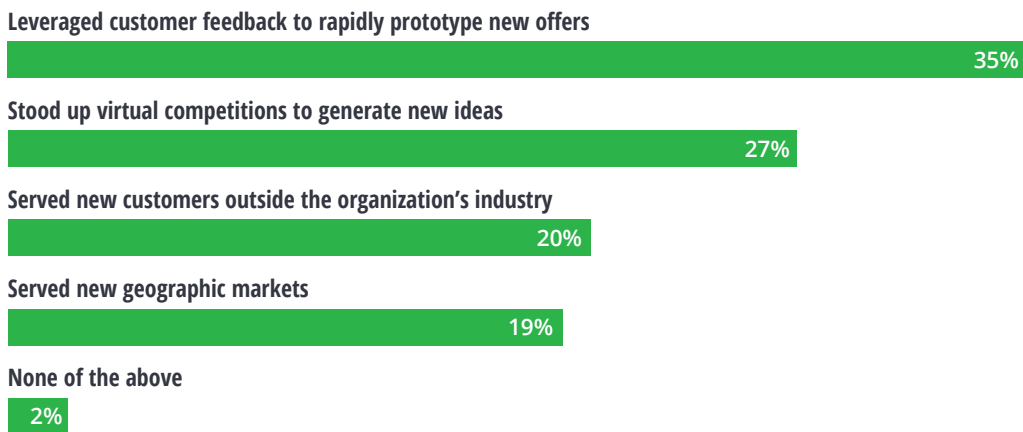
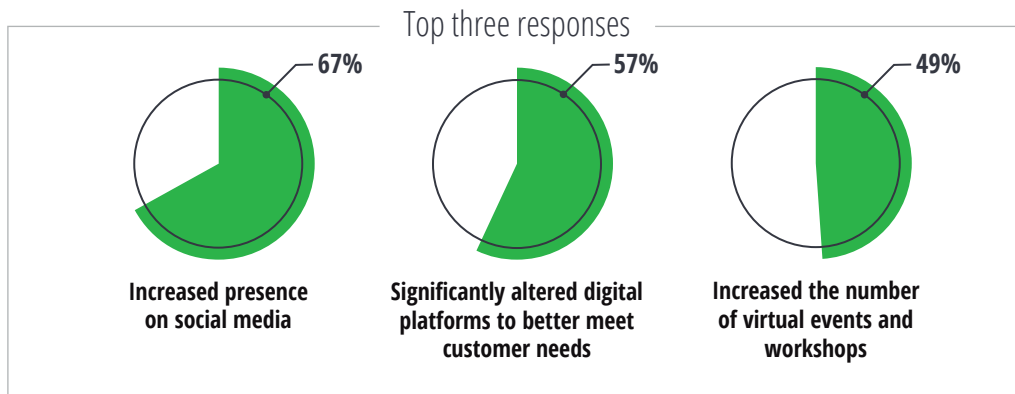
media, TV, and social media, there is a burgeoning set of social channels that some of the savviest marketers—both in B2C and B2B markets—are developing into entire social CRM ecosystems. Simultaneously, to better engage with customers during the pandemic, 67% of the C-suite respondents said they increased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

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

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

FIGURE 2

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



Source: Deloitte Global Marketing Trends C-suite Survey.

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

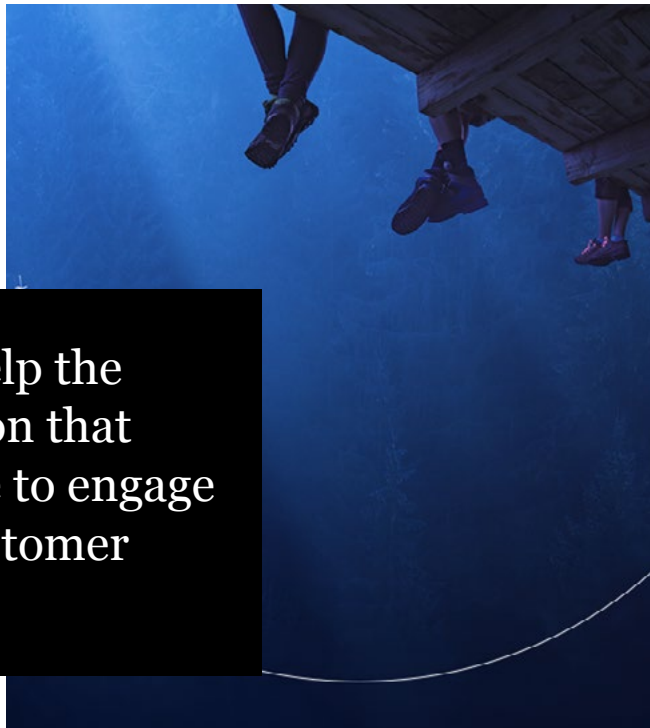
Both Perfect Diary and Sany Heavy Industry are examples of companies pioneering the use of social media for large enterprise digital marketing and commerce. For many companies based in the western hemisphere, this trend is just beginning to take form, with many refining their social strategies within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

Starting your journey to agile

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

- 1. Lead through the customer.** With CDPs becoming more commonplace (and better supported by major technology vendors), marketers can be bold in their aspirations. This starts with understanding the customer and their needs—a position the CMO is uniquely qualified to navigate (see our trend on [Fusion](#) to learn more).⁹ Our research shows that CMOs have a significant impact on customer experience conversations within the C-suite (81%). They can use this position of knowledge to help map out a unified vision for the organization.
- 2. Collaborate on channel strategy design.** When we asked members of the C-suite which functional areas will be most critical over the next year, digital technology and sales and marketing were cited the most (68% and 63%, respectively). Naturally, these two areas will be

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



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

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

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

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

Endnotes

1. Chitra Iyer, "What is a Customer Data Platform (CDP)? With top 10 CDP software for 2020," *MarTech Advisor*, November 4, 2019.
2. Jon Simpson, "Finding brand success in the digital world," *Forbes*, August 25, 2017.
3. From Deloitte client work.
4. Ibid.
5. Ruonan Zheng, "The hidden power of WeChat Social CRM: what you need to know," *Jing Daily*, May 22, 2019.
6. Jourdan Ma, "A beginner's guide to China's biggest social media platforms," *New Narrative*, June 12, 2019.
7. Diana O'Brien et al., *Diffusing agility across the organization*, Deloitte Insights, October 15, 2019.
8. Lauren Hallanan, "Fictional influencer 'Xiao Wanzi' is perfect diary's secret to success," *Jing Daily*, September 29, 2019.
9. Diana O'Brien, Jennifer Veenstra, and Timothy Murphy, *The makings of a more confident CMO*, Deloitte Insights, September 18, 2019.

About the authors



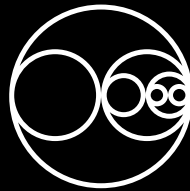
Peter Sedivy is the leader of Deloitte Digital Asia-Pacific. He is an experienced implementation leader and digital strategist with 22 years of experience in customer strategy, e-commerce, digital marketing, and large-scale digital transformation. Sedivy has led substantial initiatives in the United States, Mexico, Germany, China, and Japan for several of the world's leading companies. He is presently based in Hong Kong as part of Deloitte Advisory (Hong Kong) Ltd.



Michael Barrett is president at Deloitte Digital's Heat, working with companies to drive growth by developing new offerings, expanding relationships with existing clients and bringing in new business. A principal with Deloitte Consulting LLP, he has more than 20 years of advertising experience, in a wide variety of roles in the industry. Barrett has partnered with clients to build effective creative, powerfully engage with an audience, and craft award-winning campaigns.

Acknowledgments

The authors would like to thank **Yohan Gaumont** (Canada), **Ed Greig** (United Kingdom), and **Kathleen Peeters** (Belgium) for their contributions to the development of this trend.



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

WHAT'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.”¹ 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.

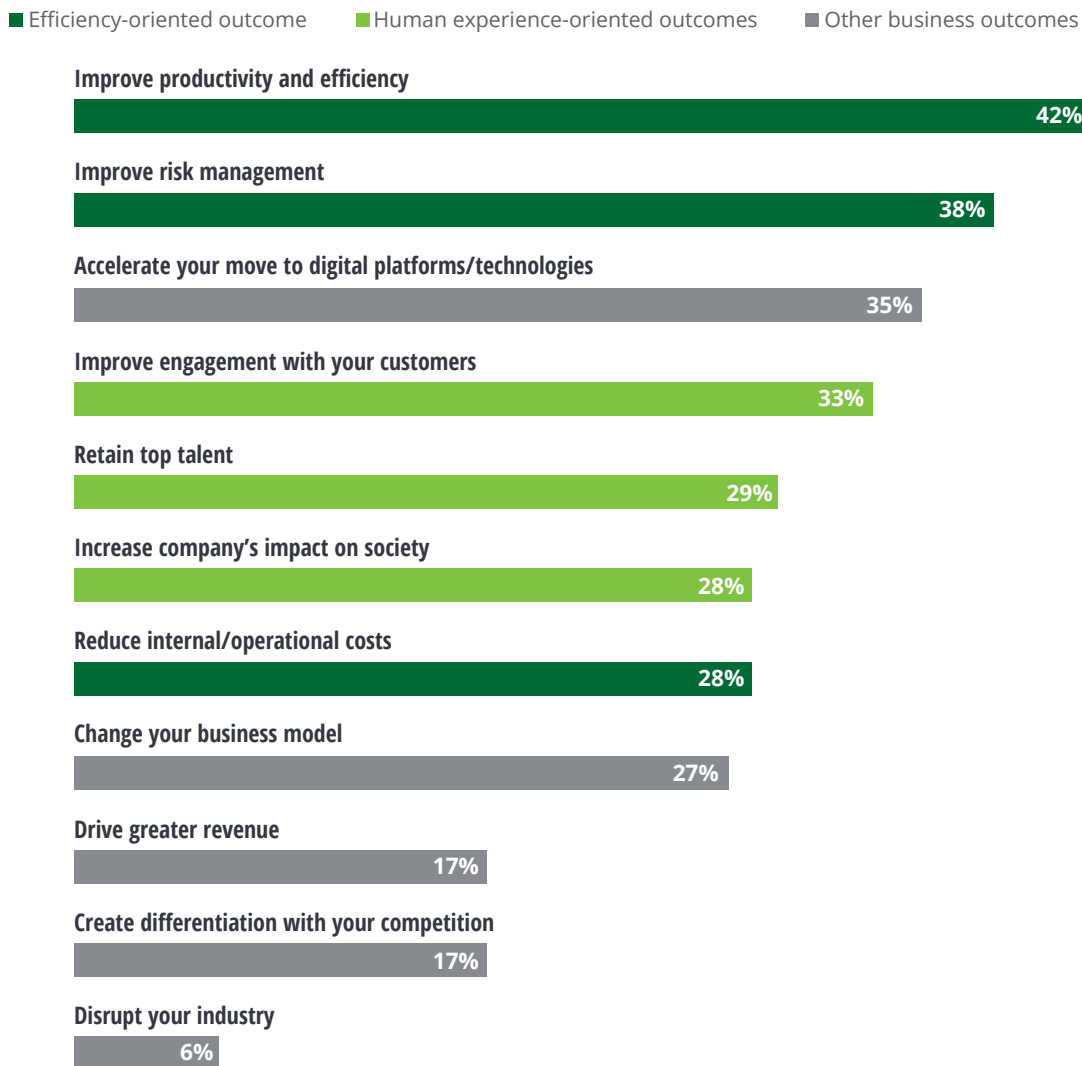
We then dug deeper and asked more than 400 executives in May the top outcomes they hoped to achieve while responding to the pandemic. Interestingly, three intuitive outcomes topped the list: Improving productivity and efficiency, improving risk management, and accelerating organizational moves to digital 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).² Ninety-five percent of our purchasing decisions are driven by subconscious urges, the biggest of which is emotion.³ 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.⁴

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

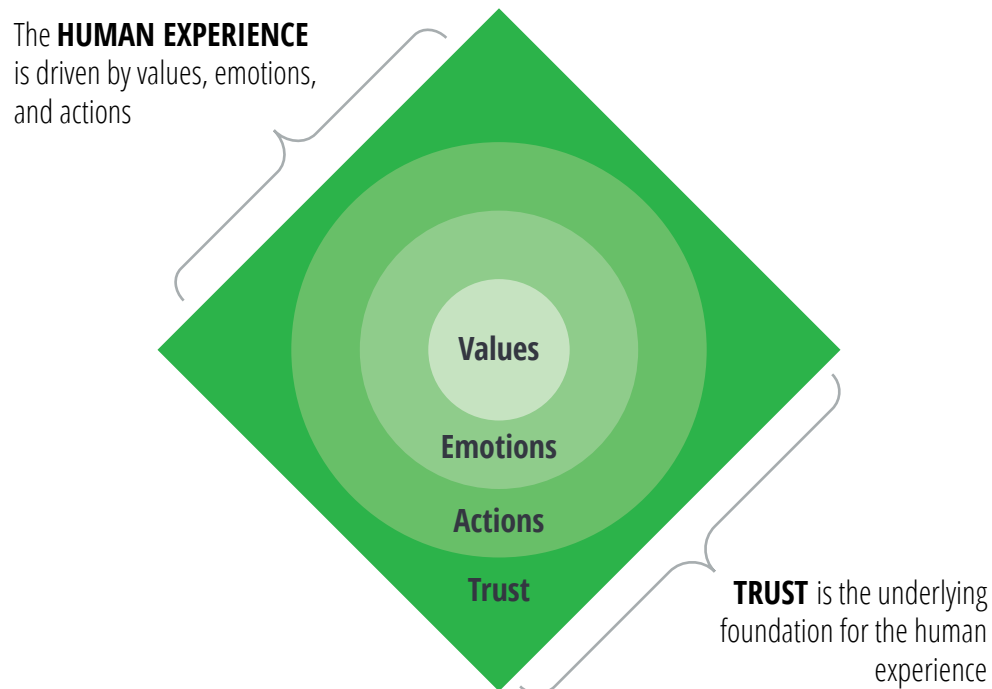
Complicating matters is the fact that in the past, organizations relied on in-person interactions to bolster the human connection while new-age digital solutions are likely a little less human. Promisingly, however, some companies have been able to quickly pivot and revamp their digital environments 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.⁵ 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.⁶ 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.⁷ 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.”⁸ 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.⁹

REDESIGNING INFRASTRUCTURE TO RESPOND TO SOCIETY'S MOST PRESSING NEEDS

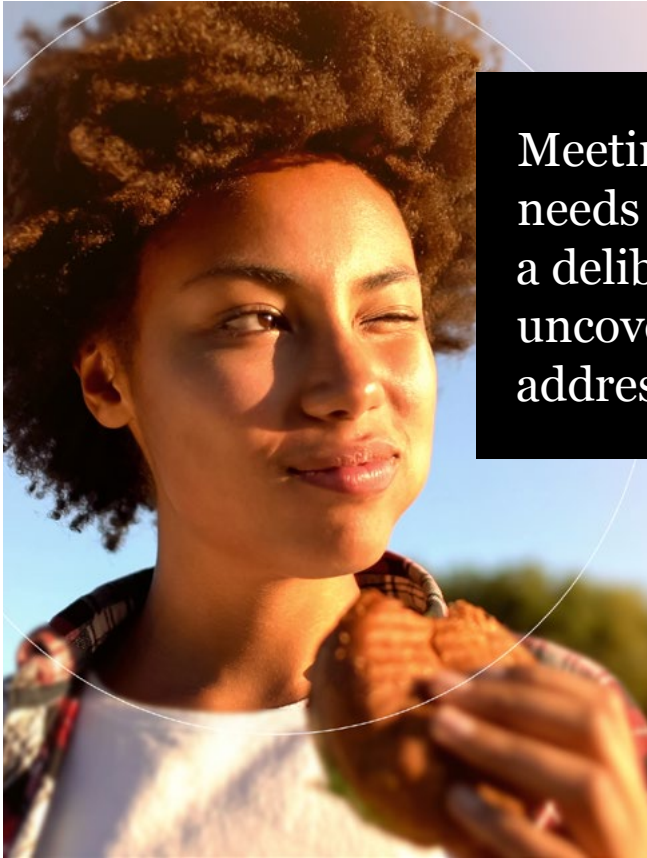
Crises always create opportunities for organizations to reset, innovate, and better serve the needs of individuals and communities. For instance, consider the devastating effects of Hurricane Katrina in the United States in August 2005.¹⁰ At the time, it was estimated that 80% of New Orleans was flooded 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.¹¹

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.¹² 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.¹³ 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.¹⁴



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.¹⁵ 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).¹⁶ 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*.

Endnotes

1. Diana O'Brien et al., *Paying down the experience debt*, Deloitte Insights, October 15, 2019.
2. Amelia Dunlop et al., "The human experience: Quantifying the value of human values," Deloitte Digital, August 7, 2019.
3. Manda Mahoney, "The subconscious mind of the customer (and how to reach it)," Harvard Business School, January 13, 2003.
4. Amelia Dunlop et al., "Navigating uncertainty: The Protector, the Pragmatist, and the Prevailer," Deloitte Digital, July 30, 2020.
5. AVATOUR, "AVATOUR and Insta360 offer virtual reality remote presence as a solution to coronavirus travel restrictions," March 11, 2020.
6. Dunlop et al., "Navigating uncertainty."
7. CBS Baltimore, "Maryland business recognized for making clear masks," July 14, 2020.
8. IKEA "Vision & Business idea," accessed July 16, 2020.
9. *Furniture, Lighting, & Décor*, "IKEA and Space10 launch website to re-think home design post COVID-19," June 17, 2020.
10. Sarah Gibbens, "Hurricane Katrina, explained," National Geographic, January 16, 2019.
11. Business Roundtable, "Our commitment," accessed July 30, 2020.
12. Ramon Laguarta, "PepsiCo CEO: 'Black Lives Matter, to our company and to me,'" *Fortune*, June 16, 2020.
13. Chobani Incubator, accessed July 29, 2020.
14. Chobani Incubator, "About," accessed July 29, 2020.
15. Amelia Dunlop, "Why CEOs are really chief (human) experience officers," *Wired* partner content, accessed July 16, 2020.
16. Diana O'Brien, Jennifer Veenstra, and Timothy Murphy, *The makings of a more confident CMO*, Deloitte Insights, September 18, 2019.

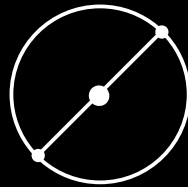
About the author



Amelia Dunlop is the chief experience officer for Deloitte Digital and leader of the US Customer Strategy and Applied Design practice for Deloitte Consulting LLP, where she helps companies develop winning strategies that combine innovation, creativity, and digital strategy. Dunlop writes and speaks regularly about human experience, creativity, and customer strategy, and contributes to the Wall Street Journal's CMO Journal and Adweek.

Acknowledgments

The author would like to thank **Maggie Gross** (United States), **Emily Werner** (United States), and **Ashley Reichheld** (United States) for their contributions to the development of this trend.



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.

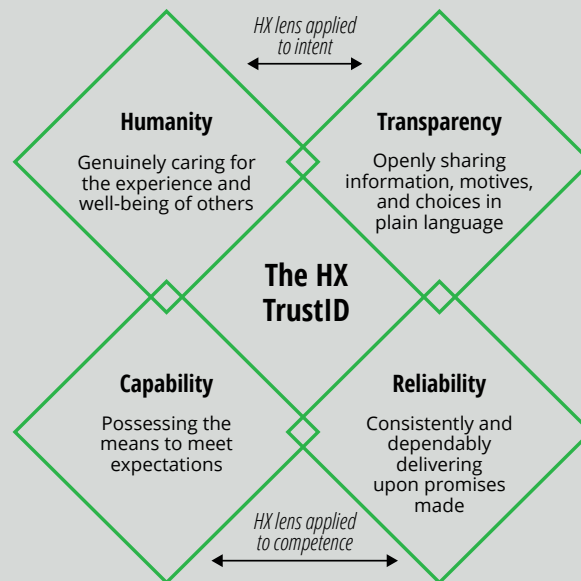
Building trust requires a coordinated effort between a number of key functions, including product development, information security, talent, and marketing strategy, among others. However, this can be challenging as different functions and roles are responsible for different activities across the enterprise (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.

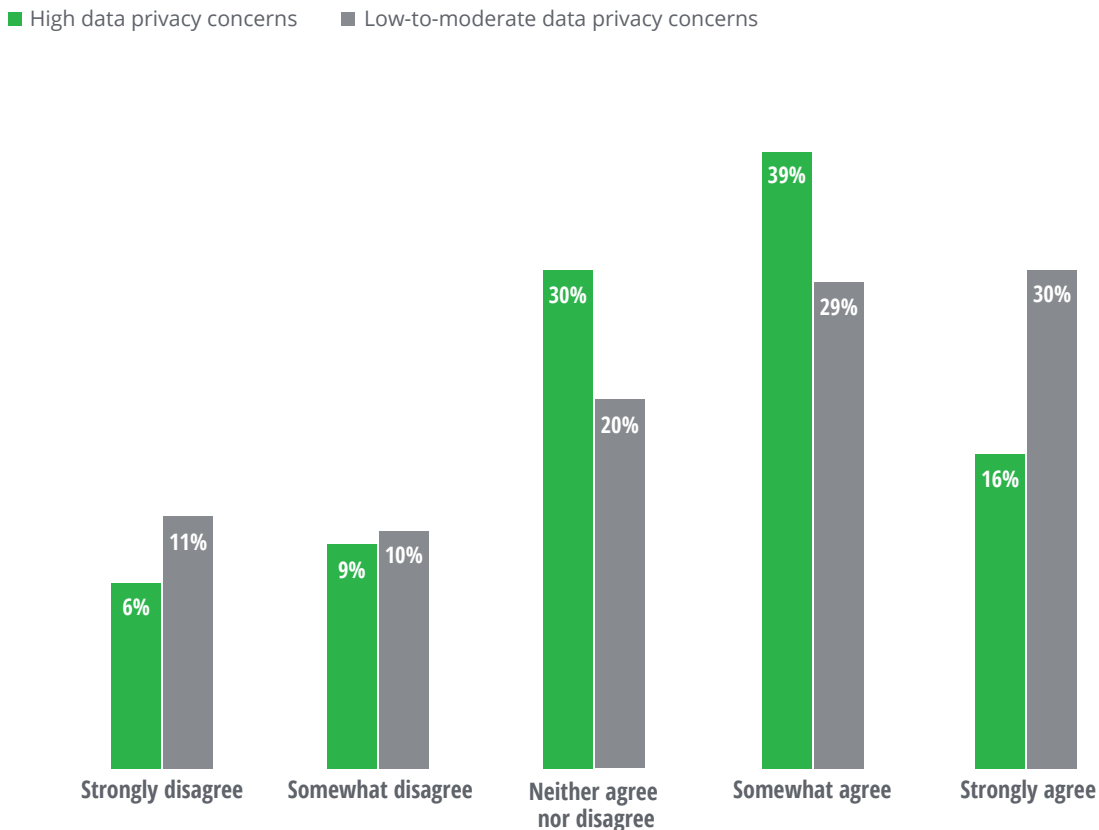
Such values-based segmentation can get even more granular. Consider people’s willingness (or the lack of it) to share their data with an organization. In our COVID-19 consumer survey, 21% strongly agreed they were willing to share their data with businesses to help respond to the pandemic. One would 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.

Endnotes

1. Ashley Reichheld et al., "A new measure of trust for consumer industries," Deloitte Digital, July 6, 2020.
2. Deloitte HX in Uncertainty Survey, 16,000 respondents, May 2020.
3. Patagonia, "Everything we make has an impact on the planet," accessed June 29, 2020.
4. Sarah Sybert, "Forcepoint names Myrna Soto as chief strategy, trust officer," Executive Gov, June 1, 2020.
5. Reichheld et al., "A new measure of trust for consumer industries," May 2020.
6. WW, "WW names Kim Seymour chief people officer," press release, PR Newswire, April 1, 2019.
7. Amelia Dunlop et al., "The human experience: Quantifying the value of human values," Deloitte Digital, August 7, 2019.
8. Maggie Gross et al., "Respond, Recover, & Thrive: Aligning with Human Values," Deloitte Digital, May 21, 2020.
9. Bryan Wroten, "Industry looks at contactless tech to build guest trust," *Hotel News Network*, May 13, 2020.
10. Dan Booth, "Delta Air Lines new Global Cleanliness division focused on innovation," *Business Traveler*, June 12, 2020; Delta, "Delta engages Mayo Clinic experts to advise on making travel even safer," June 30, 2020.

About the authors



Ashley Reichheld is the leader of the Customer, Brand & Experience practice for the Automotive, Transportation, Hospitality & Services sectors. Reichheld has spent nearly 20 years helping her clients reimagine brands and experiences, shaping the moments that matter with customers, workforce, and partners. A principal in Deloitte Digital, she is deeply passionate about building trust, enabling businesses to create value and stronger connections with people, markets, and ultimately earnings. Reichheld has lived and worked on nearly every continent and in over 40 countries and is an active writer. Her work and ideas have been featured in multiple publications, including *The Wall Street Journal*, *Adweek*, and *Skift*.



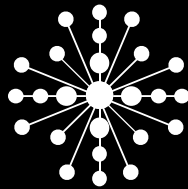
Abby Godee is the offering leader for Customer Strategy & Applied Design in Deloitte Netherlands. She also leads the Deloitte Garage in the Netherlands, which cocreates new innovations and solutions with clients. In these roles, she helps clients create customer-centric organizations and innovate and grow new businesses. Godee specializes in helping companies solve for transformational challenges by integrating and leveraging strategic business, design, and technology perspectives.



Mark Allen is the Human Insights leader for the Automotive, Transportation, Hospitality & Services sectors. A principal in Deloitte Consulting LLP, Allen is passionate about understanding the drivers of human behavior, and applying that understanding to help businesses grow through increasing customer and employee engagement, loyalty, and advocacy.

Acknowledgments

The authors would like to thank **Amelia Dunlop** (United States), **Maggie Gross** (United States), **Emily Werner** (United States), **Andy Sussman** (United States), **Dierdre O'Connell** (United States), **Casey Lafer** (United States), **Shant Marootian** (United States), and **Michael Bondar** (United States) for their contributions to the development of this trend.



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.

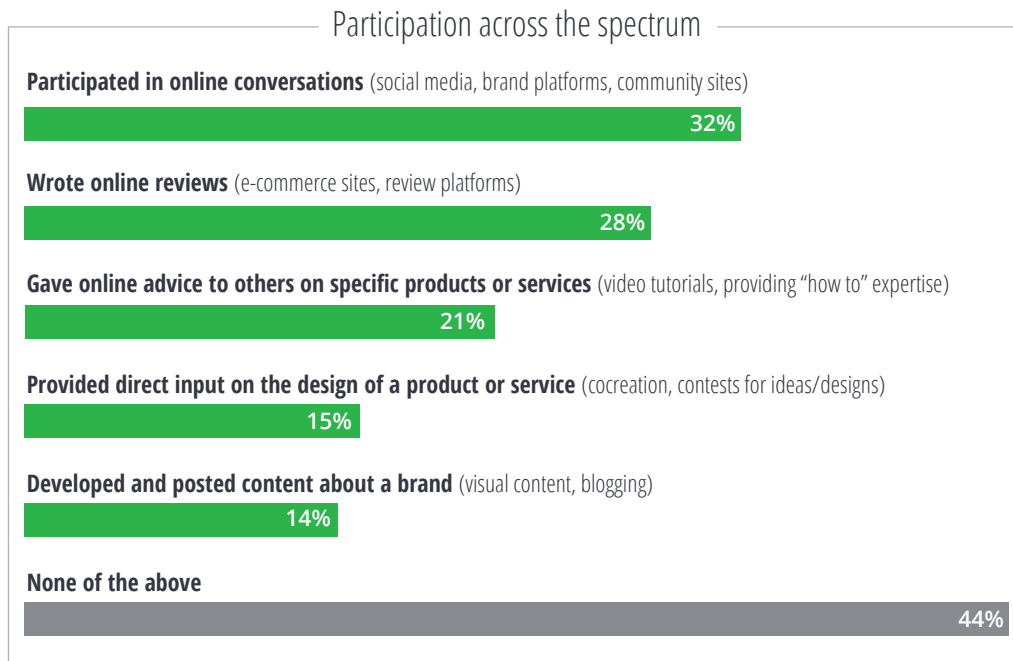
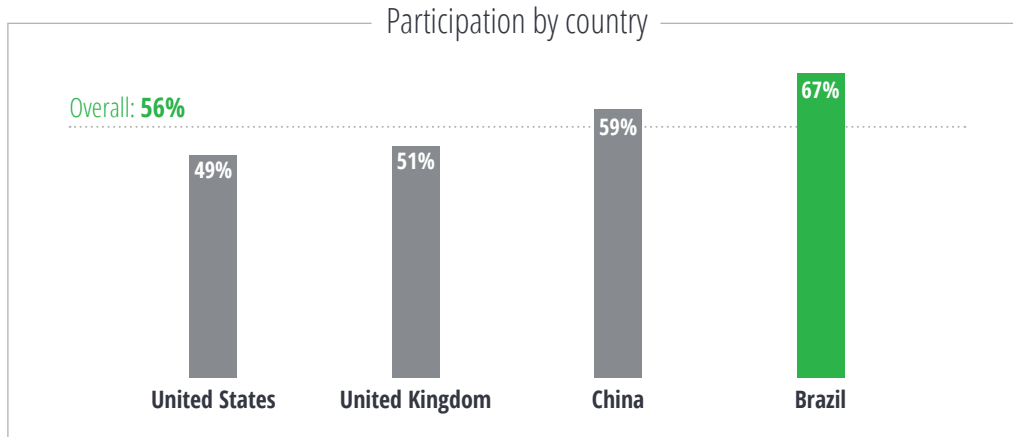
In the ensuing sections, we explore several trends related to participation: *Who* is participating across countries and age demographics, *where* are they doing it most often, and *what* motivates people to engage in deeper forms of participation. These insights can help marketers develop an engagement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

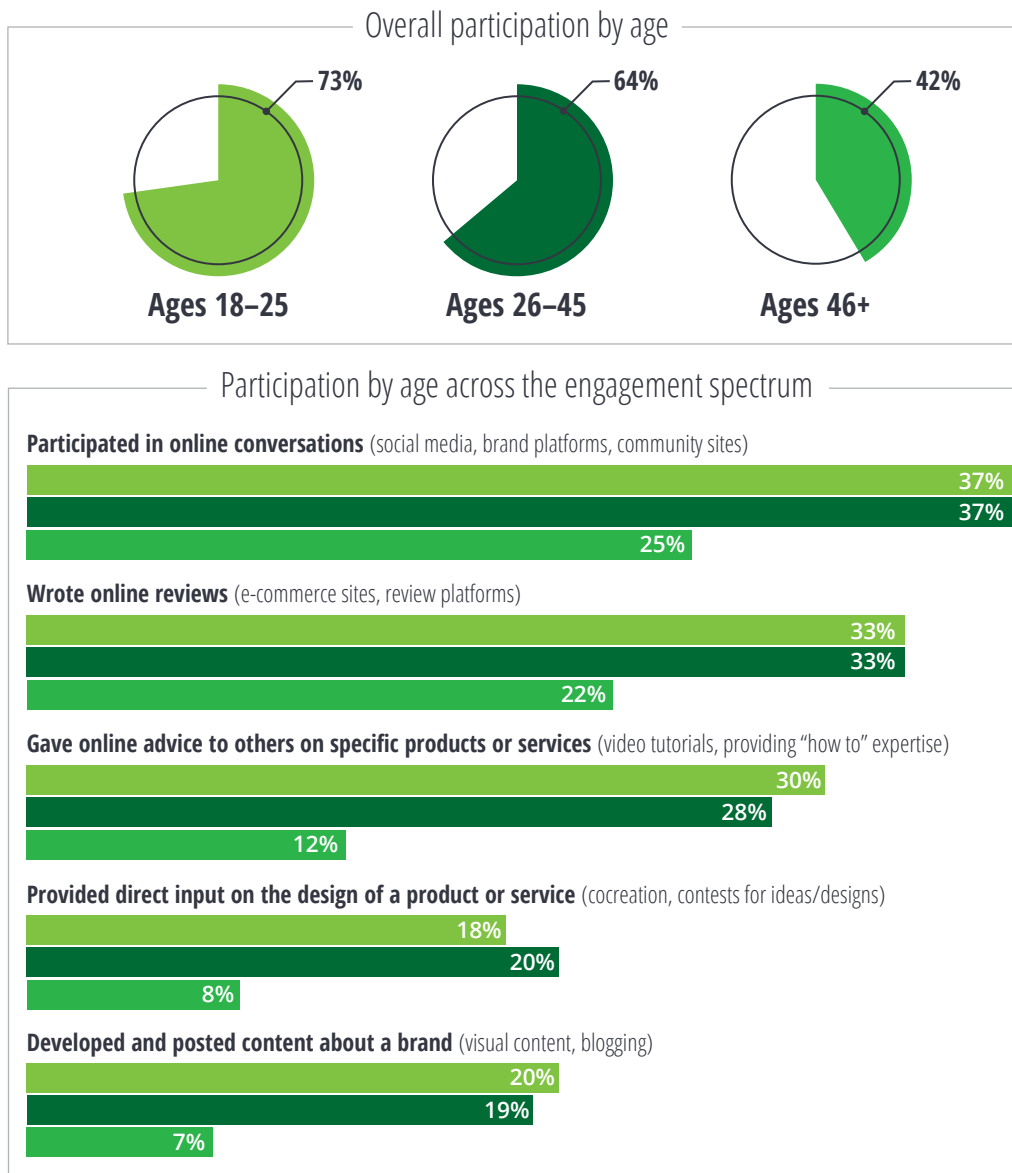
Of the four countries we surveyed, Brazil led the pack with 67% participating in some manner or the other. When we dug deeper, we found most of this

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.

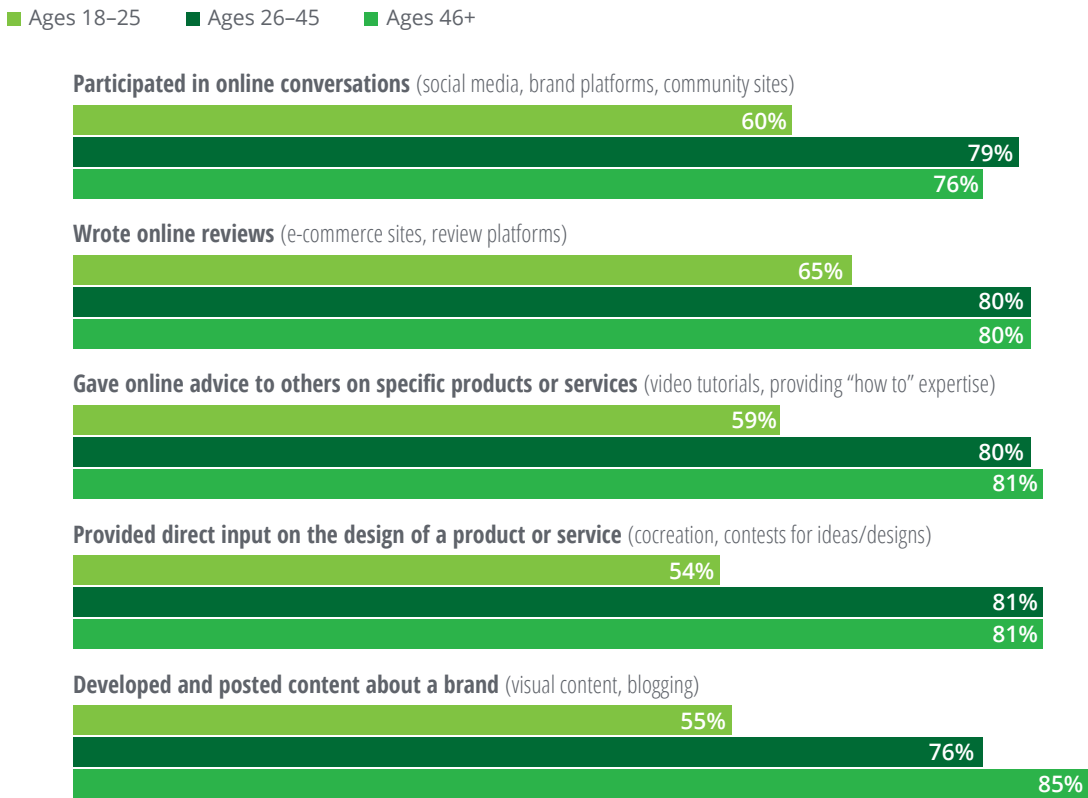
DeWalt, a global tools manufacturer, tapped into consumer passion by forming an insights community of 8,000 tradespeople and 4,000 do-it-yourselfers (DIYers).³ DeWalt provides individuals within this community with tools to test, say, during a home improvement project. The ask: customer feedback. DeWalt 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

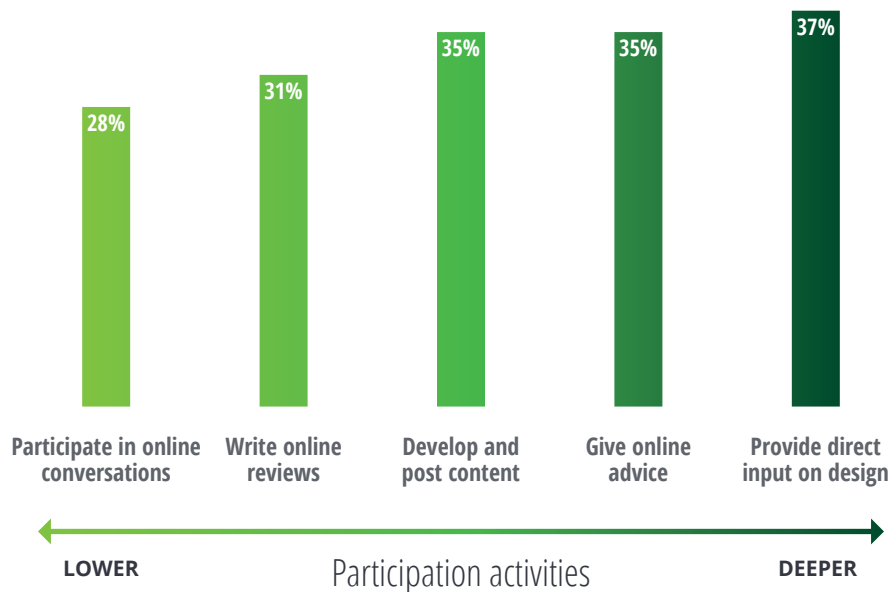
motivations such as “wanting to share something exciting,” “having expertise in a product or service,” or a “brand launching a new product.”

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.

Endnotes

1. Diana O'Brien et al., *The amplification of consumer participation: How emerging customer engagement strategies are unlocking new value for global brands*, Deloitte Insights, October 15, 2019.
2. Tamsin Smith, "What is a KOC? Behind China's latest influencer trend," *Jing Daily*, October 8, 2019.
3. Vision Critical, "How the power tool manufacturer uses customer insight to spark innovation," accessed June 25, 2020.
4. BMW Group, "BMW Group Co-Creation Lab," press release, July 20, 2010.

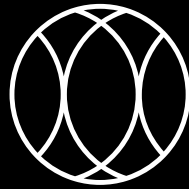
About the author



Jennifer Lacks Kaplan has more than 20 years of experience serving many of the world's leading companies in a range of industries where she helps clients develop and enable winning growth strategies and marketing transformation. She is a principal with Deloitte Consulting LLP and a member of the Customer and Marketing strategy practice within the US Strategy service line Monitor Deloitte. Prior to Deloitte, Kaplan was a senior partner at Monitor Group.

Acknowledgments

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



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).

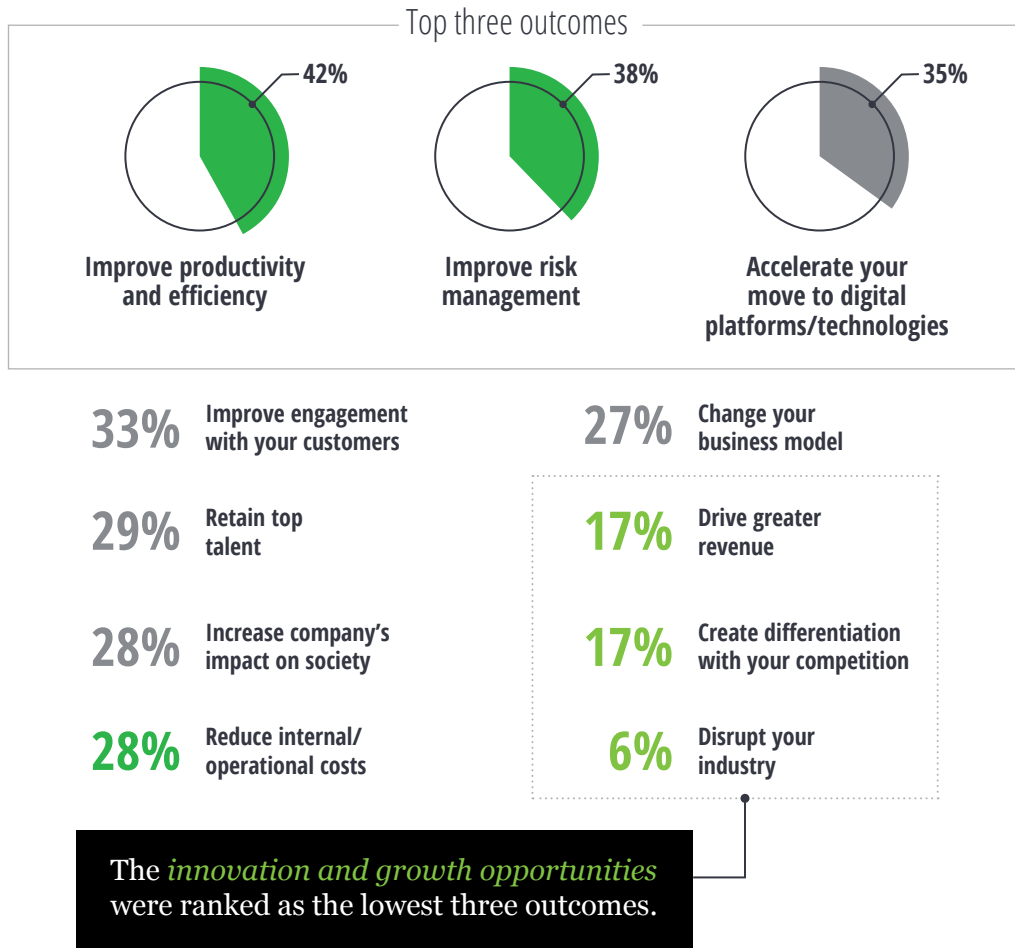
In this article, we explore how companies can break out of this defensive mindset and proactively meet the evolving needs of the people they serve. We begin by exploring how pioneering partnerships can provide the ingredients for

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.

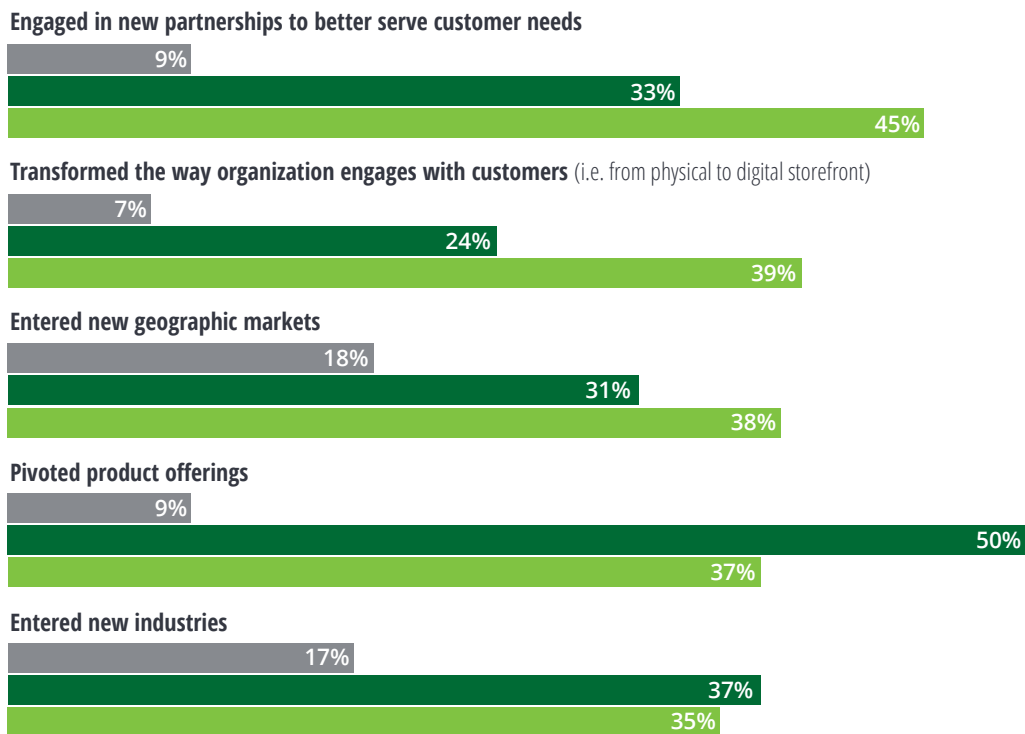
INTEGRATE CUSTOMER INSIGHTS ACROSS INDUSTRY LINES

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.

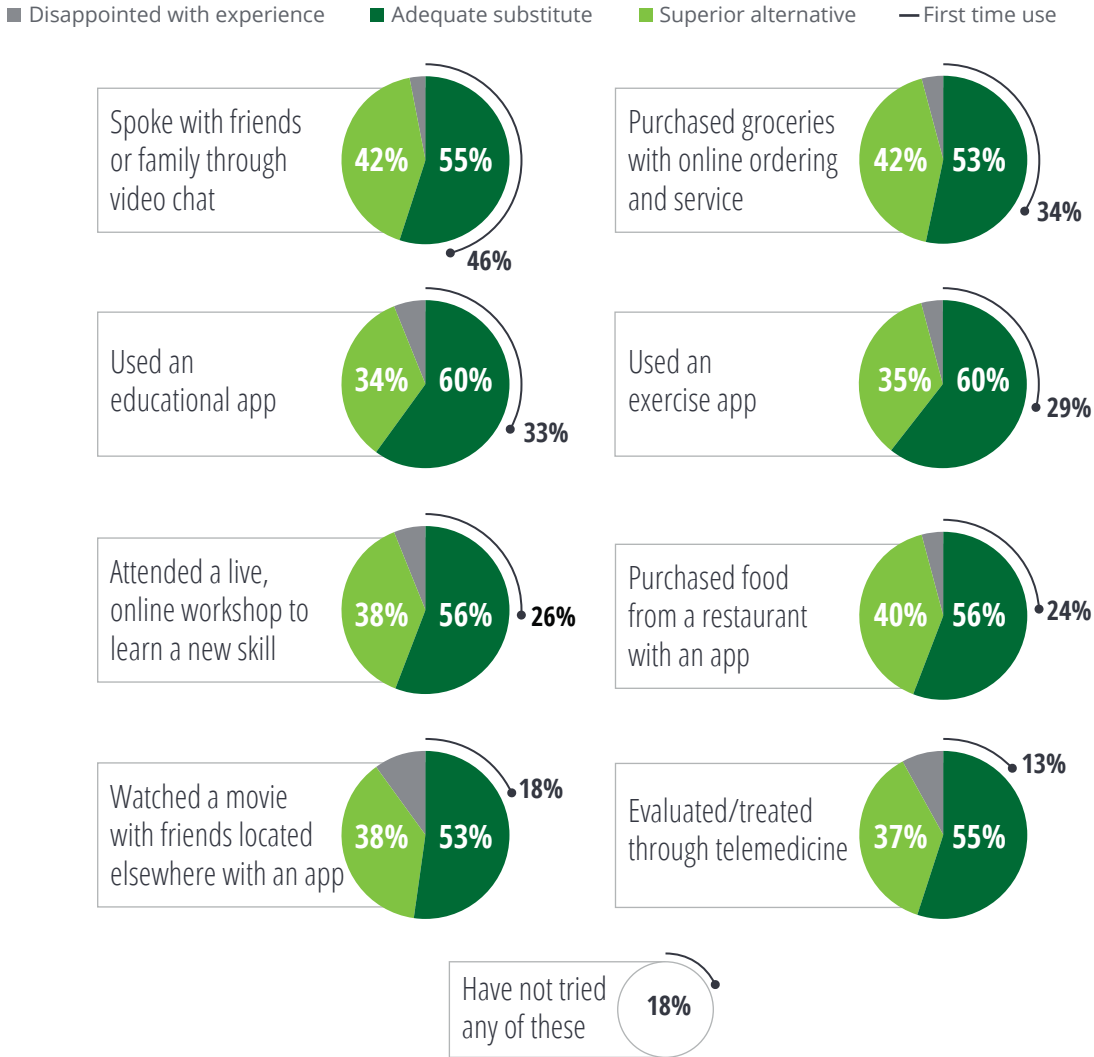
Through multiple cross-industry partnerships, ConvergeHEALTH Connect helps enable health care providers and government health agencies to digitally triage patients.

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.

Endnotes

1. Diana O'Brien et al., *Fusion is the new business blend: How the convergence of ecosystems sparks new business models and greater collaboration*, Deloitte Insights, October 15, 2019.
2. Dalvin Brown, "OpenTable launches tool to help you avoid long lines at restaurants, grocery stores," *USA Today*, March 30, 2020.
3. Business Wire, "ExxonMobil, Tencent and automotive aftersales market partner to build digital automotive maintenance ecosystem in China," press release, January 21, 2020.
4. Lloyds Bank, "Mental health & financial wellbeing," accessed June 24, 2020.
5. Example from Deloitte client work.
6. Ibid.
7. Jennifer Veenstra, Sarah Allred, and Tim Murphy, *Course correcting the evolution of the CMO: Positioning the CMO for greater organizational impact and C-suite influence*, Deloitte Insights, July 17, 2020.

About the authors



Alicia Hatch is the global CMO for Deloitte Digital’s marketing organization—an increasingly diverse and connected web of data, technology, and creative—with a focus on driving growth in the marketplace and delivering quantifiable results for clients. She also leads Deloitte’s Ecosystems and Alliances practice.



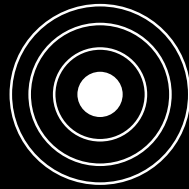
Becky Skiles is the chief marketing officer for Deloitte Digital UK and works with companies to develop and deliver transformational experiences for their customers and employees. A partner in the Customer Strategy and Design space, Skiles is passionate about working with clients to consider the wider human needs of the people in their ecosystem and designing innovative products, services and solutions to make their lives better.



Amanda Li has a background in design and is focused on embedding experience innovation in the integration of customer, data, and platforms. A partner with Deloitte Digital in China, Li has led projects that include digital strategy, new market entry and service offerings design and road map, and digital marketing and sales architecture for Fortune 20 companies. Li previously spent 11 years with Deloitte Digital Australia, where she designed, led, and delivered large scale digital transformation programs for leading brands and all levels of governments.

Acknowledgments

The authors would like to thank **Kathleen Peeters** (Belgium) for her contribution to the development of this trend.



Talent

As the marketing landscape undergoes rapid changes, talent models should evolve in-step to position marketing as a competitive differentiator.

Marketing disrupted

Four trends turning talent into a competitive differentiator

OVER THE LAST few years, the roles of marketing and talent within organizations have undergone a sea change. By now, it's apparent that the chief marketing officer (CMO) is evolving from a brand manager to an enterprisewide strategic thinker and revenue driver.¹ In parallel, talent discussions across industries—specifically, changing talent models—have seen some recurring themes. These themes may sound familiar: Artificial intelligence (AI) is making us faster and smarter workers; people are opting out of traditional 9-to-5 jobs in favor of the gig economy; and new paradigms for on-the-job training and continuous learning are altering how we grow our skill sets, to name a few.² But these aren't isolated shifts. To answer the call of the organization and elevate the role of marketing, marketers should evolve their talent models in-step with these evolving trends.

Marketers (and heads of other functions) were already incorporating many of these talent trends in their organizations in varying degrees. But then COVID-19 happened. Out of sheer necessity, organizations were forced to change how they accomplished work. When we surveyed 405 C-suite United States–based executives in May of this year, we saw some talent trends accelerate and others just starting to emerge. For instance, our survey shows that in this new environment, CMOs have

overwhelmingly turned to AI to automate work (77%). Alternately, only 6% have increased their reliance on the gig economy—a possible reflection of how gig workers can easily be scaled during economic downturns (figure 1).

Marketers need to push talent transformation to the forefront of their agenda to address this accelerated pace of change.

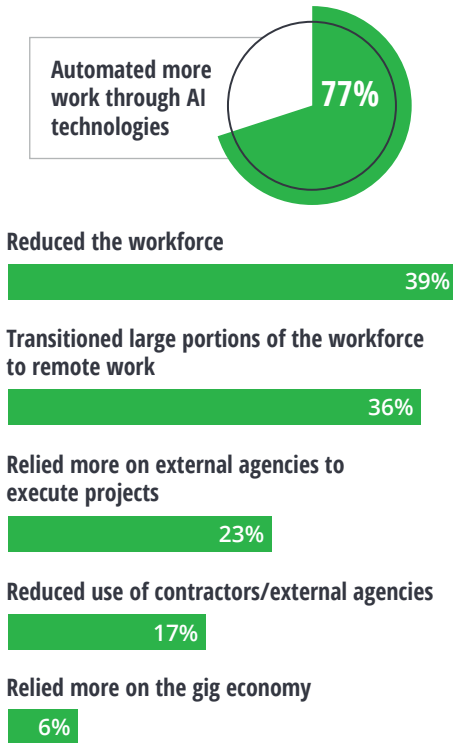
COVID-19 may be the catalyst that puts these evolving marketing and talent trends on a new trajectory. When we asked executives what are the most important functional areas over the next 12 months, they ranked marketing and sales second (61%), after digital and technology (68%). There is also evidence that the CMO's role may be gaining momentum. Just 20 months ago, 46% of CMOs had said they had a *significant* impact on C-suite conversations relating to marketing strategy.³ Now, this number has almost doubled to 81%.

To address this accelerated pace of change, marketers need to push talent transformation to the forefront of their agenda. In this article, we

FIGURE 1

More CMOs have turned to AI for automation during the pandemic

How CMOs changed their talent models during the pandemic



Source: Deloitte Global Marketing Trends C-suite Survey.

discuss four trends which, if woven into the marketing talent model, can elevate skill sets, create organizational flexibility for quickly responding to market needs, and consequently, make marketing talent a competitive differentiator.

How to elevate the marketing talent model

Let's look at how these talent-related trends can change the way in which marketing accomplishes work and how marketers can incorporate them to afford marketing talent a competitive advantage.

BRING YOUR COMPETITIVE ADVANTAGE IN-HOUSE

Earlier this year, Deloitte and The CMO Club (a global network of more than 650 CMOs and marketing leaders) published a marketing benchmark study. Our analysis found that 64% of marketing organizations have an in-house agency.⁴ Historically, many marketing departments have relied on external agency partners to execute their creative campaigns and other activities. However, even in the benchmarking study, we saw that 59% of marketing leaders still outsource their creative function while 31% do so for insights and analytics.

There is a good reason why many brands are turning toward an in-house model. While outsourcing provides access to a wide pool of expertise and talent, it can impede marketing's ability to agilely respond to customer needs (see our trend *Agility* to learn more) for a couple of reasons:

- Growing workflow complexities:** The proliferation of customer touchpoints across myriad social platforms and media channels can create an inefficient hand-off between external agencies and brands. In the time it takes to analyze customer data, build a creative campaign, and execute it in the marketplace, the window to make a connection often closes.
- Diluting the competitive advantage:** As brands rely more on external agencies, they are essentially outsourcing their competitive advantage. First, they are expecting another organization to be as attuned to their customers' needs as their own brand. Second, as agencies serve multiple clients, they're likely to reapply fundamental strategies and methods to different brands. Over time, this can result in relatively generic campaigns that look similar across multiple brands.

It's important for marketers to keep in mind that agencies can't match their internal knowledge in terms of organizational process, data, and

customer needs. Building one's own insourcing strategy starts with pivoting from an ad campaign mindset to a more holistic editorial thought process. This requires the marketing team to assess its workflows, technology, and skill sets to determine the most efficient and effective means of delivering content.⁵

Based on these assessments, marketers can develop a core team comprising roles that best reflect their competitive advantage. Traditionally, these roles include those responsible for data insights, dynamic content creation, and owned and earned media. It's important to note that bringing key skills in-house does not mean a brand must bring *everything* inside. For example, Unilever created its own in-house digital content function called U-Studio to manage its day-to-day creative needs.⁶ However, when the company needs help with broader strategic or creative ideas, it looks to external agencies for help. In this case, Unilever was able to identify where an in-house agency provides the most advantages and where external assistance is most beneficial.

LEVERAGE THE GIG ECONOMY TO SCALE DOWNSTREAM ACTIVITIES

As marketing teams gravitate toward insourcing-required skill sets, they will likely need to bifurcate their talent strategy. One prong of this strategy includes the more strategic or analytical roles while the other represents narrower, more tactical downstream roles such as graphic design or copyediting. Given the fluctuations in organizational need, marketing is increasingly looking for flexible ways to scale downstream activities. The gig economy can be an excellent resource for marketers to tap into for specific skill sets as and when the need arises. Besides, in an increasingly volatile economic environment, the gig economy enables organizations to better manage uncertainty without getting locked into long-term financial commitments.

Creative and production talent are two areas that regularly see fluctuations in terms of organizational need, often requiring scaling up or down.

Encouragingly for marketers, there are multiple platforms that provide a marketplace for clients to directly contract individuals for projects, allowing them to scale according to need. Deloitte, for example, relies upon the gig economy to augment a variety of skills, such as copyediting.

The gig economy not only provides marketers a network of contractors, but also offers them a platform to source new ideas through crowdsourcing and innovation contests (see our trend on [Participation](#)). Such contests enable organizations to solicit new ideas and innovations which they can quickly embed into their products or experiences.

It's not just the marketers who benefit from the gig work model that offers them an efficient and highly scalable source of skill sets and ideas; employees too are highly satisfied with this new work environment. In our global consumer survey of 2,447 individuals, where we asked how work environments have changed since COVID-19, we found 14% have entered the gig economy for the first time. Figure 2 shows these respondents are by far the most satisfied with their new work environments (as compared to their previous environments). This is especially true of those who've entered the gig economy in their area of expertise. This may be encouraging news for marketers who're considering their first foray into the gig economy.

ELEVATE THE MARKETER, AUTOMATE THE REDUNDANT TASKS

Employing AI for automation is one of the fastest-growing trends in the talent space—and it's likely here to stay. When we asked executives how they perceive the longevity of each of these talent trends, AI-enabled automation led the lot, with 57%

FIGURE 2

Gig workers are most satisfied with their new work environments

I believe my new work environment is superior to how I previously worked

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



Source: Deloitte Global Marketing Trends Consumer Pulse Survey.

suggesting they had found a superior way to work (figure 3). The knee-jerk reaction—as is often the case with AI—is to assume that increased reliance on the technology might reduce the need for employees. But we also found that executives do not see the pandemic-induced workforce reductions as a long-term solution. In fact, 59% said they should go back to their former workforce levels immediately after the pandemic subsides. This highlights an important fact about AI: It can be most effective when it bolsters what people are inherently good at (e.g., creativity and critical thinking) and replaces the tasks that are best left to a machine (e.g., redundant activities or computationally intensive calculations).

In both the long and short term, it makes sense for marketers to deploy AI to clear the more repetitive tasks off their plate and redesign their function’s work to concentrate on more strategic endeavors. For one, AI can have a direct application in dynamic creative assembly where it can be used to analyze data and match the best content to consumers. Take the example of a large food and beverage company that employed AI to match appropriate imagery and messaging to relevant demographics and markets.⁷ Not only did this help it create a more refined process for assembling

creative materials, it also elevated the marketer’s role to more strategic initiatives such as developing underlying rulesets. This may include dictating rules around which imagery is best suited for each AI-driven customer profile.

It’s worth noting that while AI is certainly on the rise, a significant amount of work appears to be directed toward less-sophisticated use cases (e.g., robotic process automation to execute rulesets). However, marketers can also deploy AI to improve their overall strategies and decision-making process. For instance, Norwegian Air used machine learning algorithms to identify the customer attributes and activities that most often led to flight bookings.⁸ Doing so helped the company decrease its cost-per-booking by 170% while simultaneously matching the best advertisements to each customer. Going back to our discussion on insourcing, this heightens the need for more analytical skill sets within marketing, thereby forcing marketing to upskill talent.

UPSKILL THROUGH MARKETING UNIVERSITIES

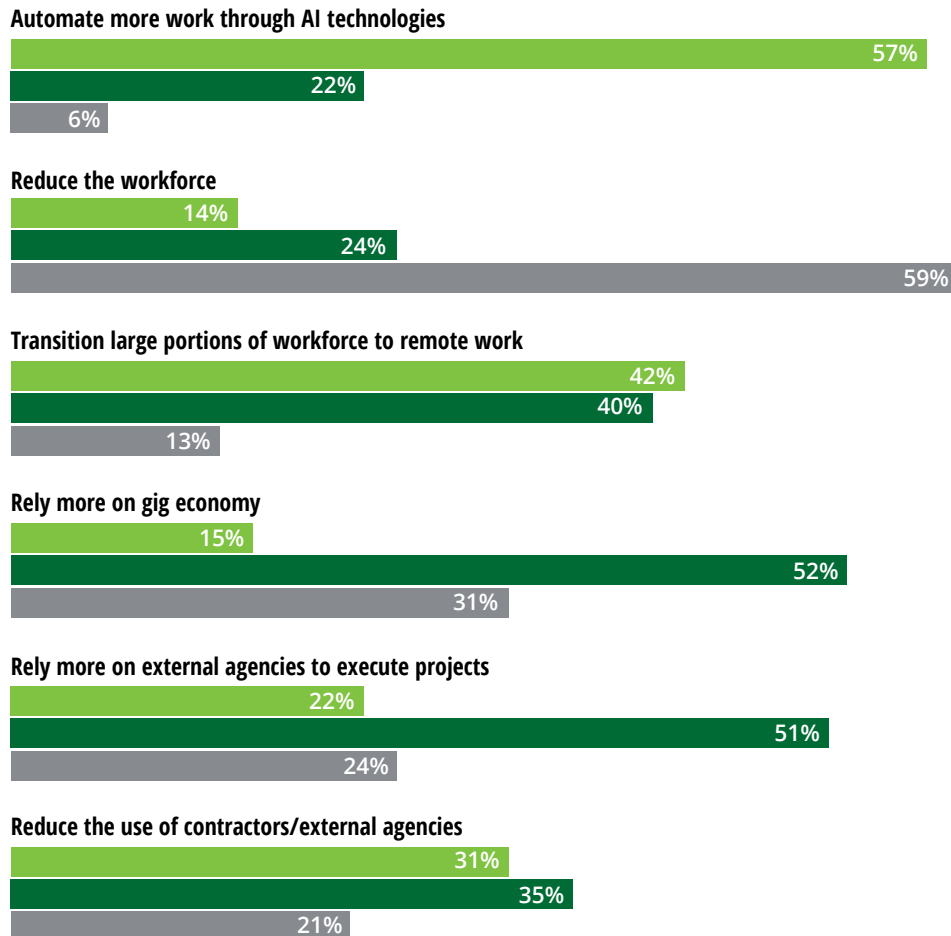
Between insourcing and automation, the role of marketing will inevitably change—and for the good. To help their teams prepare for these changes,

FIGURE 3

AI automation is here to stay, but not at the expense of the workforce

After the pandemic subsides, which option best describes your view on these talent models?

- New talent model offers a superior way to execute work
- Should retain some portion of this new talent model
- Should immediately go back to its former talent model



Source: Deloitte Global Marketing Trends C-suite Survey.

many organizations are designing in-house marketing universities that target key skills to help talent navigate the future of marketing.

In our work with clients from various industries, we've seen brands develop programs that combine online curricula with role-specific deep dives and in-person workshops. Like all forms of effective learning, these aren't "one-off" events either. To

keep pace with our ever-changing environments, marketers can create learning pathways (i.e., specialized tracks) and micro-hackathons to capture the best ideas the workforce has to offer (i.e., internal crowdsourcing). The goal is to provide multiple channels—both ongoing and event-based—to equip practitioners with the right skills, thereby optimizing marketing talent as a competitive differentiator.

The talent journey

Transforming your marketing talent organization isn't a static event. Instead, it's a journey that's unique to each marketing team's specific skill sets and structure. To best capitalize on these trends, consider the following steps:

- **Galvanize leadership commitment:** With marketing's position being currently elevated within the C-suite, there may be no better time than now to evolve talent models. However, it's hard to get started on this exercise if the leadership doesn't support upskilling of talent. Kick off your journey by enlisting support for standing up marketing universities as this will help prepare marketing talent for their elevated roles in the organization.
- **Place strategic bets:** For most organizations, there's no need to make wholesale changes to the existing talent model—marketers can simply tweak the current model by placing strategic bets on some new aspects. Start by

assessing where your strengths and weaknesses lie as a team. If your creative function is mostly outsourced, consider new models—such as the gig economy—to bring your competitive advantage back inside the four walls of your organization. If your content is fairly static, it may make sense to automate the more redundant work through AI.

- **Invest in culture:** Marketing can work best when it responds to customer needs in an agile manner. This can require a true shift in the cultural mindset—from a layered organization to one that empowers people to move quickly and adapt to changing customer needs as they arise. It also means embedding life-long learning as a key part of the company culture with a focus on evolving skill sets as needs change.

A new era of marketing requires a new outlook on talent. The organizations that do it right can elevate marketing's standing within the organization and even disrupt their industries along the way.

Endnotes

1. Diana O'Brien, Jennifer Veenstra, and Timothy Murphy, "Redefining the CMO," *Deloitte Review* 22, January 22, 2018.
2. Each of these topics were discussed at length over three years ago in *Deloitte Review* 21 on July 31, 2017.
3. Diana O'Brien, Jennifer Veenstra, and Timothy Murphy, *The makings of a more confident CMO: Three ways to increase C-suite impact*, Deloitte Insights, September 18, 2019.
4. Deloitte and The CMO Club, *Evolution of marketing organizations*, January 2020.
5. Christine Cutten and Alan Schulman, "Insourcing to gain marketing speed, efficiency, effectiveness," *Wall Street Journal*, August 8, 2018.
6. Lucy Handley, "Firms are taking more marketing functions in-house. Here's why," CNBC, March 4, 2019.
7. From Deloitte client work.
8. Chiradeep BasuMallick, "5 examples of AI in marketing to inspire you in 2019," *MarTech Advisor*, July 29, 2019.

About the authors



Christine Cutten is a leader within the Customer Transformation practice, where she helps CMOs rethink their marketing strategies and operations by working alongside them to design their road maps to the future. A principal with Deloitte Consulting LLP, Cutten received a Bachelor of Science degree from the Wharton School, University of Pennsylvania and her MBA from Kellogg Graduate School of Management, Northwestern University.



As leader of the Advertising, Marketing and Commerce practice for Deloitte Digital UK, **Libby Cousins** helps companies transform their Customer Experience, advising on re-designing and delivering digital experiences to provide a truly human experience to customers and drive business value.

Acknowledgments

The authors would like to thank **Gillian Simpson** (United Kingdom) and **Dylan Cotter** (Ireland) for their contributions 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:

OUR GLOBAL MARKETING TRENDS TEAM

- **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

OUR GLOBAL COLLABORATORS CONTRIBUTING ACROSS THE ENTIRE 2021 GLOBAL MARKETING TRENDS REPORT

Americas

- **Leadership:** Bevin Arnason, Omar Camacho, Itzel Castellanos, Shaunna Conway, Jefferson Denti, Guilherme Bretzke Evans, Maria Flores, Yohan Gaumont, Patrick Hall, Javier Huechao, Andres Gebauer Millas, Heloisa Montes, Eduardo Pacheco, Francisco Pecorella, Pablo Selvino, Renato Souza, Enrique Varela, Barbara Venneman, Livia Zufferli
- **Marketing:** Martin Avdolov, Maria Gabriela Paredes Cadiz, Marta Boica Dare, Carolina Alejandra Peters Ramirez, Coby Savage

EMEA

- **Leadership:** Rani Argov, Helene Chaplain, David Conway, Dylan Cotter, Doug De Villiers, Ronan Vander Elst, Flor de, Esteban, Joao Matias Ferreira, Cristina Gamito, Hakan Gol, Noam Gonen, Will Grobel, Antonio Ibanez, Erdem Ilhan, Randy Jagt, Andy Jolly, Ravouth Keuky, Paul Kruegel, Roland Linder, Ori Mace, Jonas Juul Mortensen, David Olsson, Riccardo Plata, Victor Press, Sam Roddick, Filipe Melo de Sampaio, Andy Sandoz, Eli Tidhar, Gabriele Vanoli, Stephen Ward, Egbert Wege, Ozlem Yanmaz
- **Marketing:** Teresa Posser de Andrade, Ala Abu Baker, Isabel Brito, Margarida Benard da Costa, Rushdi Duqah, Hanna Drzymalik, Fiona Elkins, Salimah Esmail, Zakaria El Gnaoui, Gina Grassmann, Richard Hurley, Berk Kocaman, Romain Mary, Tamara Mersnik, Maria Cristina Morra, Nikolaus Moser, Gareth Nicholls, Armin Nowshad, Tharien Padayachee, Joana Peixoto, Katrien de Raijmaeker, Sharon Ridders, Nele Roerden, Filipa Sousa Santos, Shakeel Ahmed Sawar, Tor Soderholm, Anne-Catherine Vergeynst, Krzysztof Wasowski, Peta Williams, Patricia Zangerl

APAC

- **Leadership:** Grant Frear, Steve Hallam, Pascal Hua, Emma Gu, Ryo Kanayama, Grace Ling, Go Miyashita, David Phillips, Balaji Venkataraman, Minoru Wakabayashi
- **Marketing:** Sally Denniston, George Dickinson, Ryan HitchAmber Kunziak, Yukiko Noji, Kaoru Obata

Contact us

Our insights can help you take advantage of change. If you're looking for fresh ideas to address your challenges, we should talk.

Jennifer Veenstra

CMO Program global leader | Managing director | Deloitte Consulting LLP

+1 415 783 4223 | jveenstra@deloitte.com

Deloitte.

Insights

Sign up for Deloitte Insights updates at www.deloitte.com/insights.



Follow @DeloitteInsight

Deloitte Insights contributors

Editorial: Prakriti Singhania, Abrar Khan, Rupesh Bhat, Nairita Gangopadhyay, and Preetha Devan

Creative: Molly Woodworth, Stela Murat, Tushar Barman, and Sylvia Chang

Promotion: Nikita Garia

About Deloitte Insights

Deloitte Insights publishes original articles, reports and periodicals that provide insights for businesses, the public sector and NGOs. Our goal is to draw upon research and experience from throughout our professional services organization, and that of coauthors in academia and business, to advance the conversation on a broad spectrum of topics of interest to executives and government leaders.

Deloitte Insights is an imprint of Deloitte Development LLC.

About this publication

This publication contains general information only, and none of Deloitte Touche Tohmatsu Limited, its member firms, or its and their affiliates are, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your finances or your business. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

None of Deloitte Touche Tohmatsu Limited, its member firms, or its and their respective affiliates shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.