

Accenture Interactive

Where creative meets commerce

Orchestrating brand experience
in digital marketplaces

Manufacturers and the New Retail Experience



**Consumers can
find everything on
digital marketplaces.
Except your brand.**

As go-to channels for researching and purchasing products, digital marketplaces have become de-facto gateways to brand exposure and experience.¹

For more and more consumers, marketplaces create their first impressions of brands. Yet manufacturers are not telling brand stories on digital marketplaces. The absence of the brand is a liability across consumer goods, fashion, beauty, and other sectors that are feeling the heat from disruptors vying for market share.

From now on, the battle for mindshare—and market share—will rage on digital marketplaces. To win, brands must repair broken omnichannel experiences. They must communicate their distinctive value at the point of sale. This requires a marketplace strategy that harnesses brand stories to spark preference and purchasing. The key is to deliver convenience and one-click customer journeys *with* creative storytelling that puts brand experience on the digital shelf.

1. Accenture Interactive, “Unleash your Marketplace Superpower”, September 2019

<https://www.accenture.com/us-en/insights/digital/unleash-your-marketplace-superpower>

2. Forbes, “Small CPG Brands Are Gaining Upper Hand On Giants - And Now The Big Want To Get Even Bigger”, October 2018

*Consumer packaged goods (CPG)

\$17^b

More than \$17 billion in sales shifted from large to small CPG* players between 2013 and 2018 in the United States.²

Where did the brand go?

This is the question that every brand should ask as digital marketplaces become ubiquitous, consumer behaviors evolve, and yesterday's rules no longer apply.

A look at four trends defining the landscape reveals what every manufacturer should know about the state of brand storytelling on digital marketplaces—and why it matters so much.

The missing brand

Consider a typical shopping experience on a digital marketplace. Whether consumers want a \$40,000 luxury watch or a \$4 bargain shampoo, the experience is shockingly similar. Every product detail page (PDP) looks the same. An uninspiring image of the product against a soulless white background has become the standard for almost all marketplace platforms.

This loss of rich, emotive content is profound. Brands have spent years and billions of dollars telling stories to create meaningful connections with consumers that drive sales and loyalty. But this content is invisible at the point of sale. The incredible value remains untapped. It is Nike

without “Just Do It,” Gillette without “The Best a Man Can Get” or Nespresso without George Clooney. All product. No brand. This might not be such a problem if people were still consuming content on traditional channels and absorbing brand stories there. But they aren’t.

81%

of consumers who bought a name brand product on Amazon recalled the PDP three months later. Only 28% remembered the television commercial.³

The Gen Z zeitgeist

Consumers are moving their shopping and media consumption online. Gen Z, digital natives born between about 1995 and 2010, is leading the charge.

Unlike their parents and grandparents, and even their older siblings, Gen Z consumers do not engage much with traditional media—the place where brands have always been built. Sixty-one percent have completely switched to streaming services for media programming.⁴ As such, they have no historical context for a brand’s positioning or value. If the brand is not present on digital channels like marketplaces, they just don’t know it.

As such, all the equity that even the world’s most iconic brands have created in years of traditional campaigns is being lost on the

fastest growing consumer group. While the oldest Gen Z consumers are only in their early 20s, they already have massive purchasing clout. Those in the United States spend between \$29 to \$143 billion on themselves and influence \$166 to \$333 billion in household spending every year.⁵ And by 2020, Gen Z was projected to become the world’s largest consumer group.⁶ These “kids” with smartphones and Instagram accounts today are the ones holding tomorrow’s purse strings.

4. Ad Age, “Gen Z: Decoding the Digital Generation,” August 2018

5. Barkley, “The Power of Gen Z Influence: How the Pivotal Generation is Affecting Marketing Spend,” January 2018

6. Forbes, “How Much Financial Influence Does Gen Z Have?” January 2018

7. eMarketer, “US Digital Buyers, by Age”, October 2019



36m

In the United States, over 36 million digital buyers are between ages 14 and 24.⁷

The surge of search

Gen Z consumers are not the only ones who have a different relationship with brands today. Digital shoppers are showing less brand affinity when searching for products.

As Amazon trends suggests, "...consumers are increasingly beginning their purchase journeys on Amazon, regardless of whether they ultimately make a purchase in-store, seeking everything from product details and price comparisons to customer reviews and brand credibility." As consumers search by categories, benefits and reviews, search has become the new brand. Almost 90% of product views on Amazon come from its product search function, not from merchandising, ads or product aggregators.⁸

At the same time, disruptors are seizing search as an ingenious and proactive way to create new paths to quick market entry. Using data-analysis techniques, these nimble new entrants are mining search to fuel their R&D pipelines. It is a targeted way to create new products that meet unmet consumer demand. And in the absence of brand stories on digital marketplaces, it is how months-old, digital-born brands are beating century-old giants on the digital shelf.

70%

of consumers' searches on Amazon do not include a brand name.⁹

8. Jumpshot, "The Competitive State of eCommerce Marketplaces", September 2018

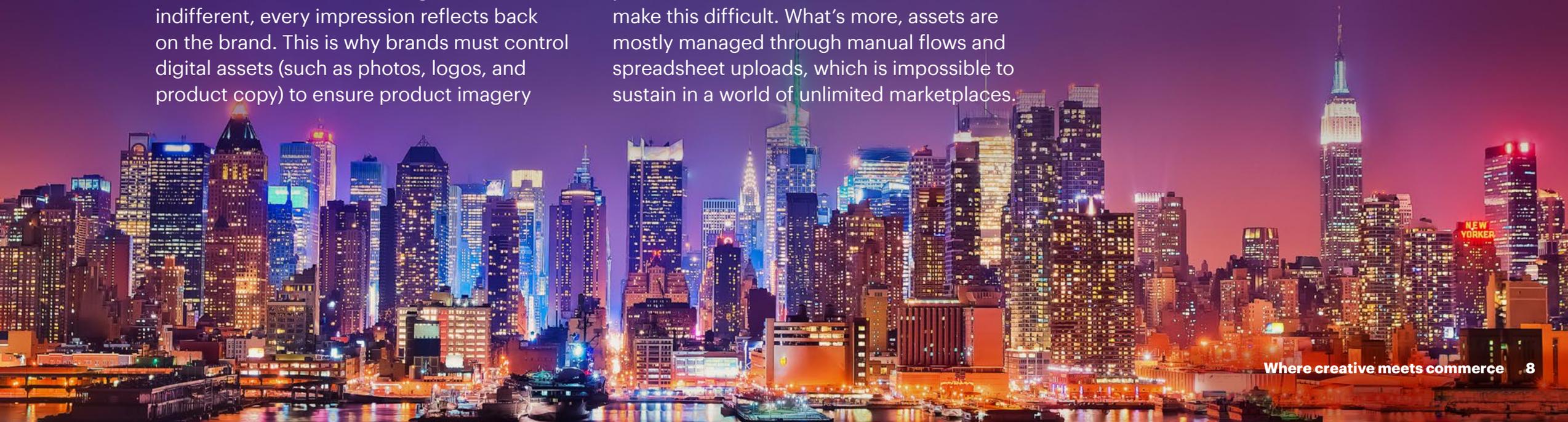
9. Amazon Data, US, September 2019

Infinite marketplaces

These consumer and competitor dynamics are playing out in a landscape of overwhelming size and complexity. From global powerhouses with huge footprints to specialized platforms with niche audiences, digital marketplaces host millions of consumer–brand interactions every day.

When consumers visit these sites, they are engaging with brands, even if all they see is a no-frills PDP. So whether good, bad or indifferent, every impression reflects back on the brand. This is why brands must control digital assets (such as photos, logos, and product copy) to ensure product imagery

and messaging is correct and consistent. Internal divisions that separate brand, social, public relations, and e-commerce teams make this difficult. What's more, assets are mostly managed through manual flows and spreadsheet uploads, which is impossible to sustain in a world of unlimited marketplaces.





Just one SKU* of a women's running shoe is available in more than **200 marketplaces in the United States alone—that excludes unofficial resellers, gray markets and secondhand marketplaces.¹⁰**

10. Accenture Interactive analysis
*Stock-keeping unit (SKU)

Taking back control

It is possible for brands to transform their approach to this brave new world of digital marketplaces.

Taking back control starts with accepting two fundamentals. First, brands cannot assume that consumers know their stories from other places. Second, while the product detail pages (PDP) has become the front door to the brand, it cannot carry this burden as it exists today.

This creates an imperative—and an opportunity—to evolve from PDP to product experience pages (PXP) that bring brand messages into the commerce experience. There are already signs of this shift. For example, to offer a different kind of marketplace experience, Walmart is looking to inject more lifestyle imagery into its PDPs.¹¹

11. Mark Wilson, "Exclusive: Walmart.com Redesigns as the Anti-Amazon," May 2018



There are many ways that brands can work within marketplaces' requirements to breathe life into PDPs.

By conceptualizing around the platforms and adapting their current brand commercials or social content, companies can embed more brand content to create emotional connections.

They can also make mobile experiences more engaging by offering shop-the-look examples from a simple turn of the wrist. Or they can create a seamless brand story across purchase, engagement, and delivery. The good news is that the technology exists now to make all this real—and to do it at scale and speed.

These breakthrough tools include experience dashboards and digital twin technology:



Marketplace experience dashboards

bring together and instantly visualize a brand's content and experience footprint across thousands of marketplaces to empower brand managers to make better decisions faster.

Dashboards offer insight into available assets and consumer demand to identify opportunities based on competitors, sales, ratings, and reviews. Relevant insights can be briefed back to creative teams to refine content and improve product positioning and storytelling.

Digital twin technology

is an effective way to scale up production capabilities and create high-quality content. Digital twin technology creates a virtual image of the product. Brand teams can alter and modify these images in countless ways to put them on any platform fast.

Not only is this a boon for localization, but it also allows brands to optimize performance on demand, testing and tweaking colors, backgrounds, packages and overall presentation, and acting on feedback.



Bringing back the brand

For years, companies have viewed digital marketplaces in largely transactional terms—as channels to sell products, not to deliver brand experiences. Creative was here. Commerce was there.

This mindset no longer plays in a world where people are spending less time consuming traditional media and Gen Z has such different consumption patterns and brand preferences. To harness all the value that brand experiences bring—promise, purpose, differentiation and inspiration—brands have to be where consumers are. And that is in digital marketplaces.

Bringing brand experiences to marketplaces is a literal white space. Success starts with the following fundamentals:

Brands need a **unified** story that brings the brand into the entire shopping experience.

1. Build more muscle.

Think big rather than in silos and build skills, alignment and capabilities across the organization, and develop a strategy for using external support resources as necessary to create a more agile data-driven organization.

2. Mix up the teams.

Form unconventional experience teams that bring together the best creatives, e-commerce masters and technology gurus. This is key to create consistent and compelling brand experiences at scale across all owned properties and ecosystems including marketplaces.

3. Connect to create.

Collaborate in new ways with channel partners to conceptualize what's possible within the required templates. Leverage mutual interests to attract consumers to the digital shelf.

These are significant structural, cultural, and strategic changes, no doubt. Through it all, brands must stay true to their purpose. Because it is the heart and soul of brand experiences that move consumers to purchase

and keep them coming back.



Contact

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