Building brands in the walled gardens

Part of the Marketer's Toolkit 2020 series

WARC BY ASCENTIAL

The Marketer's Toolkit 2020

This is the ninth annual Marketer's Toolkit from WARC – but for 2020 we have introduced a new methodology.

This report adopts the STEIP methodology developed by WARC's sister brands within the Ascential group of companies.

STEIP covers five drivers of change that will affect marketers next year: Society, Technology, Economy, Industry and Policy. By combining these five focus areas, the report provides a bottom-up assessment of the influences on 2020 marketing strategy.

The basis for the report is the Marketer's Toolkit survey, structured around the five STEIP drivers, of almost 800 client and agency-side practitioners around the world. The data from this survey was combined with insight from a series of CMO interviews, plus a review of WARC's global data, industry knowledge, examples and expert contributors.

S	T	E	I	P
SOCIETY	TECHNOLOGY	ECONOMY	INDUSTRY	POLICY
The drivers altering consumer behaviour and preferences	The drivers enabling new models, processes and possibilities	The drivers of marketing investment	The drivers dictating the competitive environment	The regulatory drivers affecting marketing activity

This report is part of the **Marketer's Toolkit 2020 series**, which is comprised of:

The Marketer's Toolkit 2020 – a summary of what you need to know for your marketing strategy in 2020

Data Report – all the results of our Marketer's Toolkit survey, under each of the five STEIP drivers of change

Five in-depth reports:
Society – The Greta effect
Technology – Context and connected TV
Economy – The pivot back to brand
Industry – Building brands in walled gardens
Policy – Privacy-first marketing

10 CMO interviews

Go to warc.com/Toolkit to read all the content

The Marketer's Toolkit 2020 was created in association with the following Ascential brands:

Building brands in the walled gardens

The digital platforms are winning. Amazon is chipping away at Google's supremacy of the search ad market, and is projected to earn $13.9bn from advertising in 2019. Advertising accounts for a fifth of Tencent's global revenues, worth over $8bn, while Alibaba and JD.com dominate the retail landscape in Asia, with combined annual revenues of nearly $450bn.

These 'walled gardens' increasingly combine paid advertising with payment and e-commerce fulfilment, with the promise to marketers of much more visible links between marketing investment and sales performance. However, as those platforms grow ever-more influential, marketers are increasingly tasked with building their brands within ecosystems over which they have little or no control.

More on Industry in 2020

Read the Marketer's Toolkit Data Report for more on the industry trends affecting marketing plans in 2020.

- Customer experience continues to drive the digital transformation agenda. A growing challenge is to combine brand and CX thinking.
- The clear majority of respondents say return on CX is harder to measure than returns for advertising.
- More than a third of marketers will in-house some ad tech and programmatic buying functions over the next year.

What's the evidence?

1. Platforms aim to close the loop on performance advertising effectiveness

Digital platforms allow advertisers to communicate at multiple stages along a customer journey, measuring and optimising campaigns in real time to increase the chances of conversion.

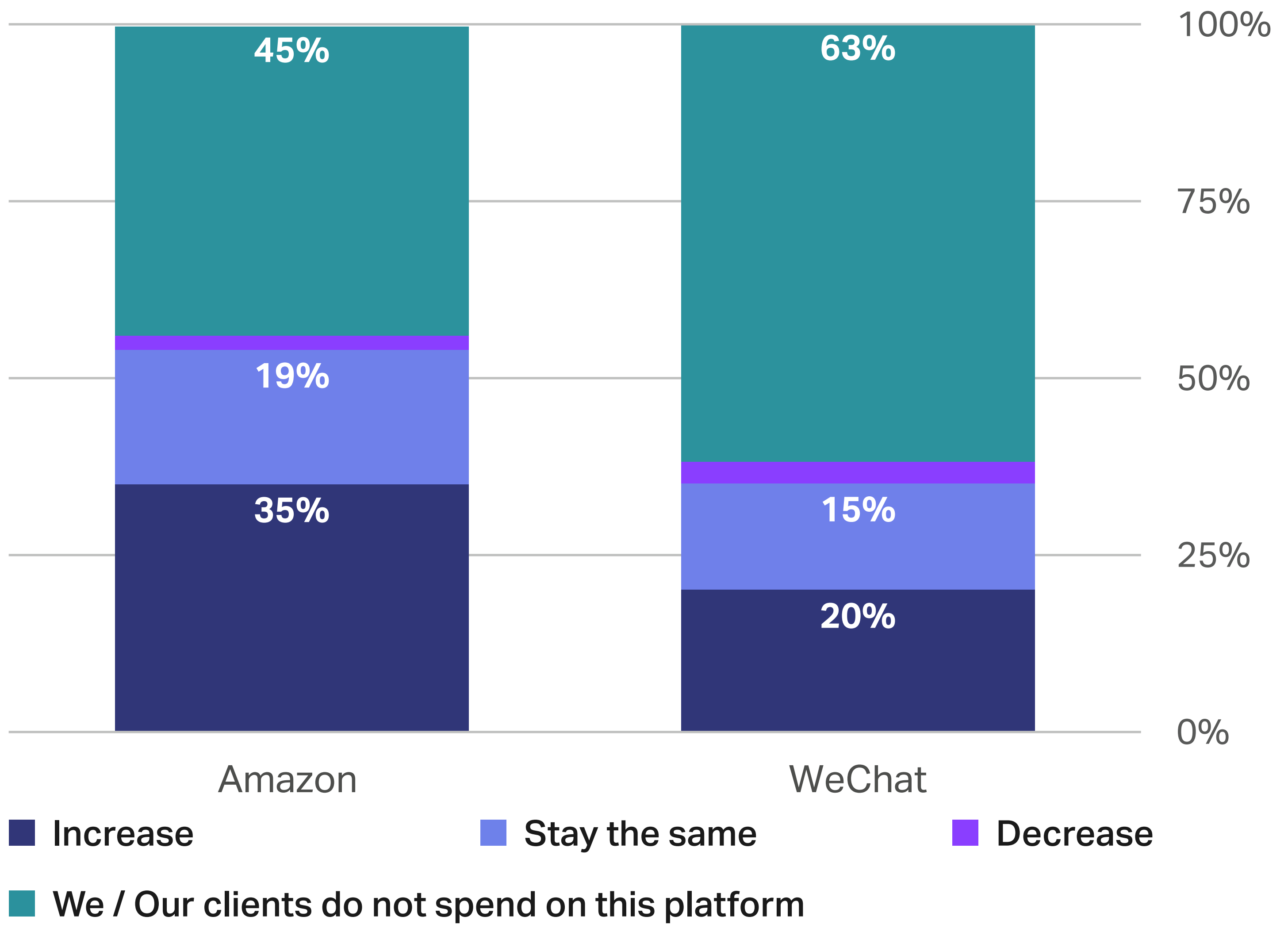
Brands can buy Sponsored Product ads on Amazon to get in front of consumers searching for products, and retarget users showing signs of intent via Amazon DSP. A Chinese WeChat user can view a post by a friend or Key Opinion Leader referencing a brand, and click through to buy that product without leaving the platform.

Ease of payment is a key pillar to platforms' success. The mass adoption of apps such as Alibaba's Alipay and Tencent's WeChat Pay in China has inspired Facebook's attempts to launch a cryptocurrency, the Libra Association, and accompanying digital wallet, Calibra.

The benefits are clear: if Facebook can prove a relationship between the ads it serves and an increase in Libra-facilitated sales, Facebook will be able to increase yields from ad inventory. However, several major backers have already pulled out, and its success is far from guaranteed.

Most importantly, platforms are proving popular with advertisers: 23% of brand respondents to WARC's Toolkit survey said they plan to increase adspend with Amazon in 2020, with only 3% of marketers anticipating a decrease in investment. WeChat is also predicted to benefit from a net budget increase from advertisers over the coming 12 months.

How do you expect investment to change in 2020?



Source: WARC Marketer's Toolkit 2020 survey

2. Retailers and media companies are copying platform business models

The largest bricks-and-mortar retailers in the US – including Walmart, Target and Kroger – are pursuing the 'platformisation' of their own businesses, including bolstering content offerings and ad tech stacks to attract some of the additional brand investment going into e-commerce media.

While digital firms possess rich user data, including all-important signals of intent from previous search behaviour, physical retailers have an additional advantage in the form of in-store purchase insights.

Take Walmart: it plans to monetise the 300 million shoppers visiting its 4,700 stores each month through native-style sponsored search ads, audience targeting and measurement. A key priority has been carving out a mass family audience for its Vudu online video streaming service, though reports suggest the retailer may soon step back from the content business.

A symmetrical picture emerges within the media category. Facebook, an amasser of vast advertising revenues, is focused on the growth of its content proposition – mostly in the form of video platform Facebook Watch – as well as enabling users to purchase items without having to leave the confines of the social network through features such as Instagram's Checkout.

3. Amazon is focused on winning brand advertising dollars in 2020

Most spend on Amazon is currently linked to performance outcomes – indeed, brands have been recommended to adopt a direct-response approach even when using richer video ad formats on the platform.

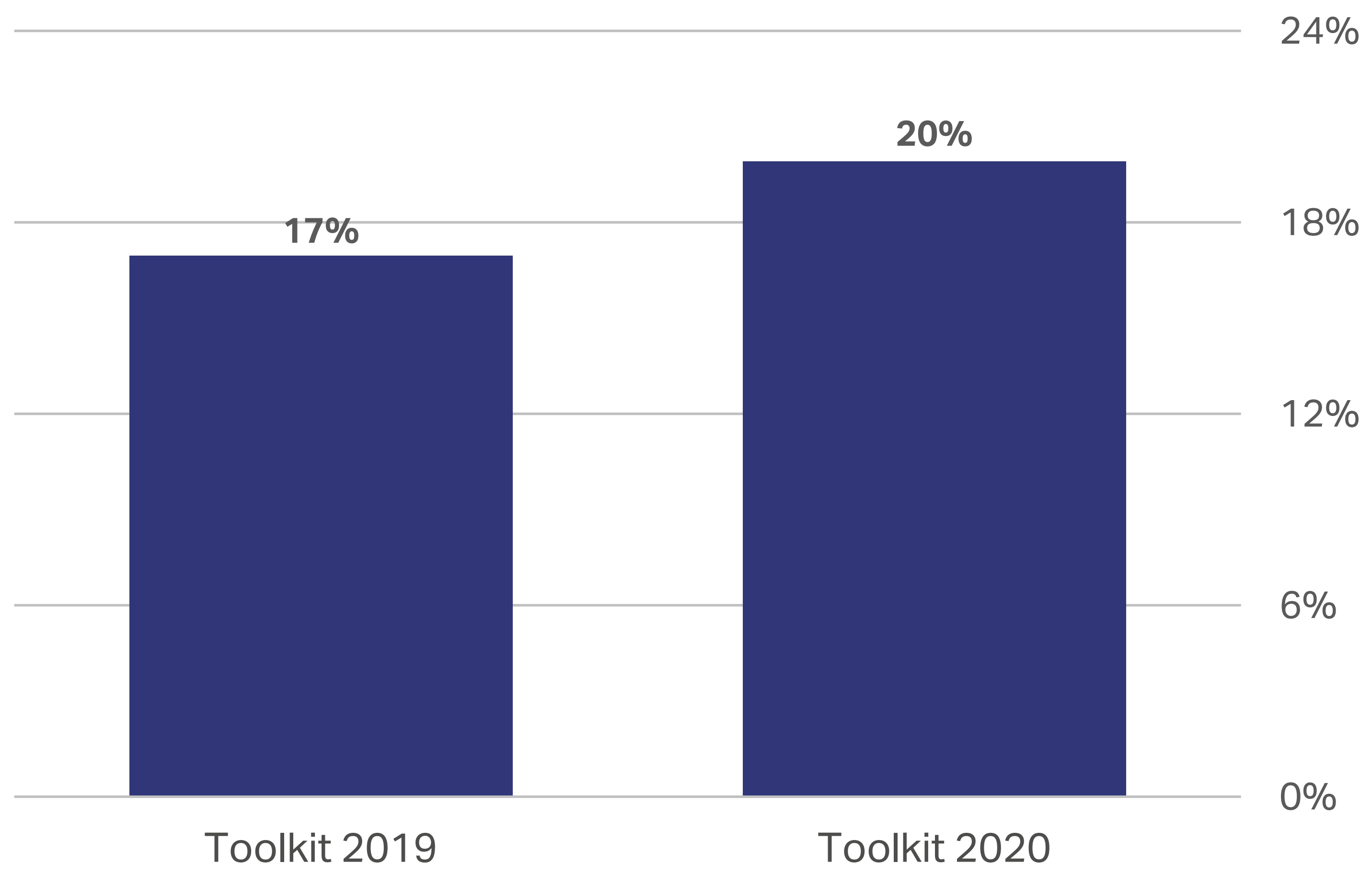
Some brands, particularly those in the direct-to-consumer space, already use Amazon as a vehicle to extend reach. However, brand-building is largely restricted to Amazon's Store tool, popular with brands in categories such as fashion and FMCG (including Procter & Gamble), which can tailor their homepages with content.

As Amazon sets its sights on the brand dollars still being spent on TV media, the platform must decide the extent to which it is willing to compromise its single-minded approach to user experience to allow brands to engage consumers in more immersive and potentially less efficient ways.

A clear opportunity to trial brand-building formats presents itself in Prime Video. Amazon has spent heavily acquiring broadcast rights for properties such as the NFL and the English Premier League. Consumers' perceived tolerance to interruptive ads in live sports content may tempt Amazon to introduce ads, just as soon as it is able to prove it has an audience for such content.

There are clear lessons for Amazon in China, where Alibaba has created a content-rich environment for brands to exploit through its Flagship Store 2.0 upgrade. Rather than helping users to purchase as soon as possible, Alibaba was able to achieve record Singles' Day sales in 2019 by creating "friction" through live-streamed, KOL-fronted content which kept users on the platform for longer.

Percentage of respondents citing the dominance of Google/Facebook/Amazon as the biggest cause for concern when drawing up marketing plans for 2020



WARC Marketer's Toolkit 2020 survey

CMO comments

“

The bigger ecosystem coming online is that retailers [like Walmart and Target] are starting to sell media. They’ll have closed ecosystems, so we should be able to see immediately who’s buying, what they’re buying and whether it’s working. That could be huge if it works.

Jill Baskin,
Chief Marketing Officer,
The Hershey Company

“

It’s not just about driving a sale in e-commerce. How do you show up inside of Amazon so that people are more likely to buy your product than somebody else’s? How do you make all of your marketing shoppable? The platforms absolutely offer an opportunity to make a sale, to build a brand, and to understand your consumer.

Ivan Pollard, Chief Marketing Officer, General Mills

“

The ‘key owned experience’ is mandatory. You have to get people into your product, use your product, experience your service, because those are things nobody can take away from you... The only way is for us to control the whole channel ourselves for direct access to the end-customer and to ensure customer satisfaction, ultimately.

Bernd Pichler, Chief Marketing Officer, ICONIQ Motors

2020 recommendations

1

Tailor your strategy for each platform

It would be wrong to adopt a one-size-fits-all approach to advertising on digital platforms. While Amazon prioritises efficiency in the purchase journey, Alibaba is more focused on social 'stickiness', with brands encouraged to engage with users through live-streamed content. Brand owners like Unilever are succeeding by designing products and content to suit respective e-commerce environments, creating individualised brand experiences, and using platform data to inform innovation.

2

Ensure distinctive brand assets

The high volume of smaller Chinese brands on platforms like Tmall and WeChat can make it difficult for larger international advertisers to stand out. Marketers may find themselves straitjacketed by the content formats available on each platform and app, hindering the development of unique branded experiences. It pays to invest in highly distinctive branding, including an easily-identifiable colour palette and product shots, and to build salience through other channels.

3

Understand the new rules of frequency capping

In the performance-driven environment offered by the platforms, marketers must adapt their thinking on campaign planning issues such as frequency management. For instance, Amazon offers three main self-serve ad products: Sponsored Products, Sponsored Brands and Amazon DSP. For Sponsored Brands, the optimal frequency is approximately five impressions per placement per user per day, while steady messaging often proves more effective than bombardment.

Potential pitfalls

1

Platform ads can be unpopular with users

Around a tenth of all product page views on Amazon come from sponsored listings. However, recent research revealed poor satisfaction scores. While more than a third of respondents admitted to clicking on an Amazon product ad when searching for a product, only 21% find them helpful, 31% claim not to notice them, and a quarter described them as “distracting”. Such findings are likely to hinder the introduction of brand-building ad formats, given the intense focus of engineering-led organisations like Amazon on customer experience.

2

Reliable attribution is hard to come by

While platforms like Amazon are moving up the purchase funnel, and enabling product discovery, the importance of other channels in growing brand and driving performance should not be underestimated. UK insurer Direct Line was able to prove its brands were earning tens of millions of pounds in incremental profitability in the form of a price premium when purchased via online aggregators, in the wake of sustained investment in above-the-line advertising. While marketers have visibility of the effectiveness of ads within Amazon, they should be careful not to discount the importance of other brand touchpoints.

3

Muddling brand and performance metrics

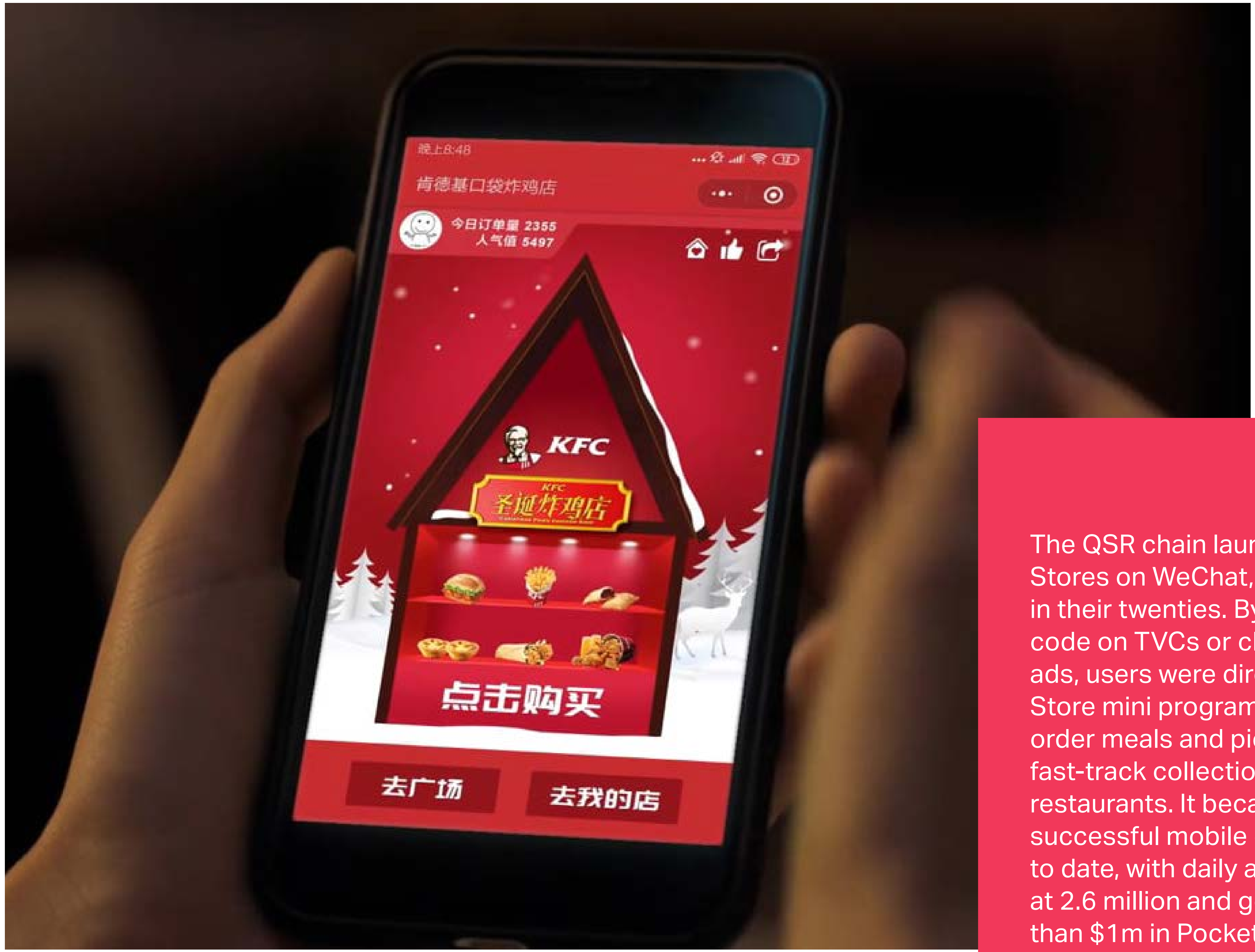
As Amazon strives to convince advertisers it can deliver “full-funnel” outcomes, and not simply a short-term return on ad spend (ROAS), marketers must retain clarity on what they hope to achieve through campaigns running on the platform. Purse-string holders within brand-owner organisations are likely to have been persuaded to spend as a result of “clear-cut” ROAS projections, and would need to be won over afresh to invest in brand-building activity. Marketers ought to select the right metrics to measure respective short- and long-term outcomes.

Case study

KFC: 'Christmas Pocket Store'

KFC used WeChat to complement its physical store presence across China, and drive attention of its 'Christmas Fried Chicken Shop' campaign.

Read the full article on WARC



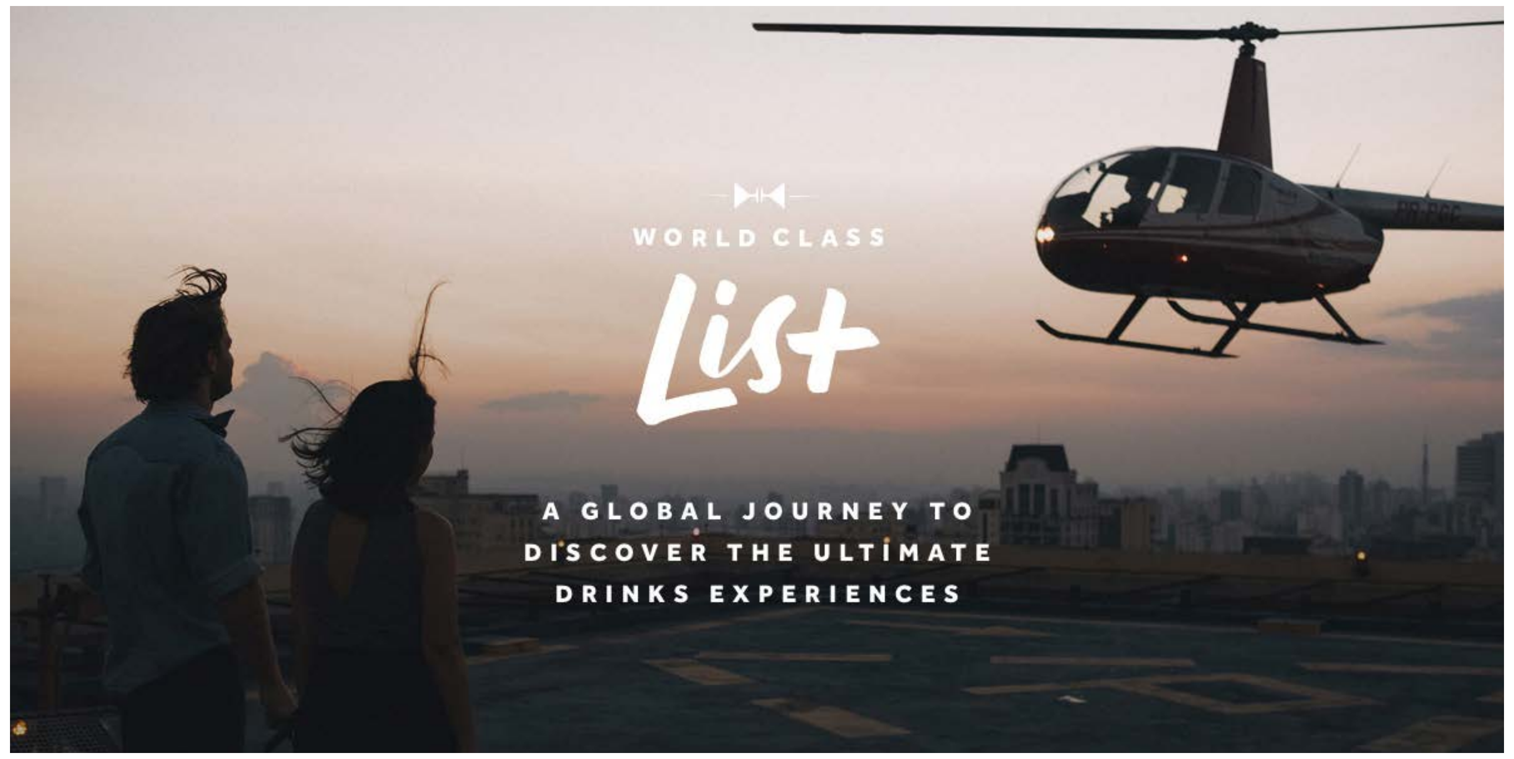
The QSR chain launched KFC Pocket Stores on WeChat, targeting consumers in their twenties. By scanning the QR code on TVCs or clicking on WeChat ads, users were directed to Pocket Store mini program, allowing users to order meals and pick them up from fast-track collection points in KFC restaurants. It became KFC's most successful mobile commerce campaign to date, with daily active users peaking at 2.6 million and generating more than $1m in Pocket Store sales.

Case study
Diageo: 'World Class List'

Diageo entered into a content and commerce partnership with Amazon to raise awareness – and subsequently drive sales – of its reserve spirits range.

Read the full article on WARC

The campaign was led by a video content series, called World Class List. The documentaries saw Australian musician Carey Watkins explore the cocktail culture in a host of international cities, including São Paulo, Sydney and San Francisco. The drinks company claims to have seen an immediate ROI in the form short term sales. "This isn't just a brand-building exercise – it's commerce [too], because there's a direct link through to purchase with them," commented Jerry Daykin, formerly Head of Global Digital Media Partnerships at Diageo.



Expert commentary
How packaged goods brands can work with China's walled gardens

Xian Wang
Global Content Director,
Edge by Ascential

As the digital transformation of the Chinese retail sector continues to progress, the sector will be shaped by what local players have referred to as 'New Retail', a term coined by Alibaba. This term means the blurring of physical and online shopping, to offer a seamless experience - with new digital touchpoints added to the customer journey both instore and online, alongside a frictionless cross-channel shopping, payment and fulfilment experience, as exemplified by Alibaba's experiential Hema grocery format.

These companies are expanding their businesses beyond retail to become integrated into more aspects of shoppers' lives, including entertainment, payments and social media as part of growing ecosystems.

As major players in China continue to aggregate shoppers and vendors onto their platforms, they will take a larger share of e-commerce transactions. The wealth of user data available to these ecosystem operators is enabling a comprehensive view of shopper behaviour unmatched in the industry. Unlike Western shoppers, who are accustomed to simple, transactional online buying, Chinese consumers go to these platforms to be entertained and to explore new trends as well as to shop.

Driven by the marketplace platforms provided by e-commerce leaders Alibaba, JD.com and Pinduoduo, the '3P' (third-party) business model will continue to dominate Chinese e-commerce sales over the next five years.

Digital ecosystems therefore become the primary place to engage with consumers. However, while 3P marketplaces allow vendors to reach new customers, standing out on their platforms is difficult. At the same time, the visibility enabled by digital marketplaces can dramatically enhance the reach of local or new to market brands, making small brands look big and allowing them to compete with established brands from day one of launch.

Indeed, the reach of digital marketplaces offers convenient comparisons for shoppers meaning suppliers will have an increasingly difficult time differentiating from the high volume of other vendors.

“Non-Chinese brands can position themselves as transparent quality product providers of outstanding compliance

E-commerce and social media become intertwined, as the latter moves towards enabling social commerce

Following the unprecedented success of Chinese group-buying platform Pinduoduo, fellow platforms including Alibaba, JD.com, Kaola and RED have all been leveraging social interactions along the shopper journey to attract new shoppers, drive product discovery and push conversion.

With social platforms like Instagram and Pinterest ramping up their shopping capabilities, social elements are becoming integral components to shopping globally. Brands must tap the power of user-generated content, and adapt their marketing strategies to facilitate social interaction between shoppers.

As online captures around 20% of Chinese retail, CPG must be part of the rising omnichannel environment and support the transformation process. They can do this by providing innovation and consumer insight, as well as continuously optimising product portfolios. Failing to do this, they will be locked out of Chinese e-commerce, one of the world’s largest growth opportunities.

Recommendations for CPG brands:

- CPG companies not trading in China must enter the market now to capture growth opportunities as the spread of online grocery, O2O business models, automation and new fulfilment methods gathers momentum. Brands should engage in cross-channel strategies building brand loyalty in-store that fuels conversion online

- CPGs should focus their resources on the channels of the future, which include e-commerce platforms and residential small box. Both create challenges around brand visibility, which suppliers should tackle via partnerships (sharing category knowledge and shopper insight for greater visibility on platforms), innovation and shopper engagement (helping to win scarce physical shelf space).

- CPGs should see independent and rural stores as important routes to a consumer whose purchasing power will double over the next decade.

- CPGs will need to innovate all the time to keep engaged a shopper who gets enthusiastic about new products and technologies, but gets bored easily and moves on fast.

- In an environment subject to growing government control, CPGs must treat government relationships, compliance and transparency as a high priority. Non-Chinese brands can position themselves as transparent quality product providers of outstanding compliance, benefiting from damaged trust in local suppliers in quality-sensitive categories, such as baby food.

- CPG and retailers not operating in China should follow the market closely, as it features digital-first formats, logistics and technological innovation that are likely to be deployed in markets around the world.

Brands will need to develop a deeper understanding of the ecosystem strategy of each retailer to align brand strategy to relevant touchpoints available. Early engagement in new initiatives will be much appreciated by retailers and will help drive brand relevance

Brands should also consider data-sharing agreements and analytics capabilities to ensure that they leverage real-time shopper data for new product development.

Expert commentary

No, China's walled gardens are not limitations

Christina Lu
Chief Strategy Officer,
Wavemaker China

Marketers in China should think about utilising walled gardens to figure out relevance and interactivity at scale. We all know that China's walled gardens, whether Alibaba or Tencent, are infused with data capabilities for better understanding consumers from an insider perspective. The more we use them, the more we can build individualised experiences, as well as diversified content within those closed ecosystems – and this is key.

People tend to think that walled gardens are limitations; I think of them as opportunities.

You see, all of these walled gardens are actually building ecosystems fundamentally led by their respective hero apps (Tencent is focusing on social, Alibaba on e-commerce).

For example, 'new retail' seemed only a concept a couple of years ago. Today, it is quite amazing in terms of how the walled gardens are connecting the online and offline contact points with their own data capabilities. We talked about 'O2O' for many years before this, but the tech platforms have enabled real integration and altered the consumer journey.

Looking at the marketing landscape in China now, I see lots of opportunities in leveraging big data for product innovations. One recent case is Oreo launching a new cookie combined with nuts and dried fruits, co-created with the Tmall Innovation Center. This really came from Alibaba's data analysing the characteristics of consumers who like to buy cookies, and the discovery they also like to eat nuts and dried fruits.

Oreo is not a Wavemaker client, but we study quite a lot of different brands to think about how we can transform ourselves. At the end of the day, for many of our clients, driving business growth means we need precision at scale.

From mass marketing to niche communities

Something that we have already started trying is a very targeted community approach, whether through a moms' group on WeChat, a babycare vertical, or other smaller walled gardens.

We cannot take a mass advertising approach as we did in the past. To do individualised brand experiences well, these walled gardens have potential of connecting all the touchpoints in a consumer journey. The walled gardens are pushing themselves to do that, in terms of powering up their data capabilities and tracking. I would say that they provide brands with a good amount of ammunition. However, challenges of marketing within walled gardens do exist, especially in measurement of brand health. To utilise these closed ecosystems fully, we are pushed hard to articulate what success looks like. With cross-channel user journeys, it is getting more and more critical for end-to-end metrics, and have continuity in such metrics.

When working within these powerful closed platforms, I would advise marketers to really understand what your brand stands for in terms of distinctiveness. I think that needs to be very clear. There are a lot of brand manifestos and brand values being thrown around that look vague. For marketers to make it work and get something out of the walled gardens, this is an area of improvement.

Shaping brand distinctiveness to me is about taking a consumer-centric approach in looking into how we go to market. If we reflect on China today, if we are pursuing younger consumers or the Generation Z born in a digital era and frequenting these walled gardens, we have to ask ourselves if we are playing the role of a co-creator of the identity and lifestyle that this generation is after.

> People tend to think that walled gardens are limitations; I think of them as opportunities

Expert commentary
Amazon's dilemma in its quest for brand ad dollars

Richard Kirk
Managing Partner
(Strategy & Data), Zenith UK

Amazon Advertising's rise has been truly spectacular. Tucked away as "Other" in Amazon's quarterly results, its ad business topped $3.5bn in Q3 2019. It took just seven quarters to jump from $1bn in 90-day revenue to $3bn. The same leap took Facebook just under three years.

This is an incredibly driven business, even by Amazon's standards. Advertising is tasked to deliver profits Amazon can redeploy back into its retail business, as part of the effort to grow its share of the global $23tn retail market. With a potential slowdown in Amazon Web Services (AWS) growth (another key profitability driver), the ad business can be seen as a 'big bet' to drive profit.

Now Amazon needs to win other marketing budget pots to maintain its growth trajectory and break Google and Facebook's grip on digital advertising. It has to convince advertisers they can activate "full-funnel" campaigns delivering more than just 14-day ROAS. Amazon's ads need to do more than just "selling beer to people in pub toilets".

Two routes to growth exist. Firstly, a play for trade marketing budgets, by showcasing how Amazon drives mid-funnel consideration metrics for brands. Leaning on existing trade contacts, Amazon hopes to capture a part of this $500bn per year industry. January's launch of a "new to brand" metric is key to this.

Secondly, Amazon is pursuing traditional brand advertising budgets. It has acquired the rights to broadcast live sports via Prime, and made moves to reduce spend barriers for brand lift measurement within the platform. In addition, Amazon is finally focusing real resource on building bridges with media agency teams.

Can a left-brain company learn to live with irrationality?

However, growing brand advertising share is no easy task, even for a company as driven as Amazon. At its core, Amazon is an extremely rational company, justifying ads as 'good' because they are relevant, rather than effective.

> A marketer looking to improve saliency or perception for a national brand hardly needs pinpoint accuracy in communications; impactful ad units and weekly reach are more important

Brian Olsavsky, Amazon's CFO, recently said: "What we're focused on really… is relevancy, making sure that ads are relevant to our customers, helpful to our customers… machine learning [is] helping us to drive better and better relevancy." How does a company with such a left-brain, engineering-led culture pivot to win at a discipline (brand advertising) rooted in people's irrationality? Can you square the quote above with Ambler's famous line "the waste in advertising is the part that works"?

Winning brand advertising spend will also negate Amazon's other key selling points, such as its ability to deliver direct sales metrics. Asking advertisers that bought into Amazon Advertising for the clear-cut ROAS numbers to suddenly start judging campaigns in a longer-term manner, with new numbers, is going to be a tough sell.

Another strength that will not be as potent is using customer data to inform targeting. A marketer looking to improve saliency or perception for a national brand hardly needs pinpoint accuracy in communications; impactful ad units and weekly reach are more important. Whilst Amazon can deliver a scaled audience, building new formats that help advertisers land their message in an attention-grabbing way will be tough, as it rubs up against 'customer obsession', Amazon's raison d'etre.

This obsession means new ad formats have to pass stringent internal checks around customer experience (negative customer ad feedback reaches SVP level on a regular basis). Unfortunately for Amazon Advertising product development, shoppers complain about new ad formats more often than not, posing a difficult problem: how to introduce larger, deliberately-disruptive ads into its most heavily trafficked areas AND justify them as a customer benefit, when people say they prefer ad-free spaces?

Does Amazon need the money?

Aligning Amazon's desire for advertising revenue with its founding principles is further complicated by its many revenue streams. When questions pitting 'customer good' versus revenue arise at Facebook, ad sales wins every time, as ads are the sole income source.

However, at Amazon, this isn't the case: Amazon has so many revenue streams, it can say "no" to potential ad products. For instance, given current demand for quality broadcast video on-demand (BVOD) inventory, a free-to-access, ad-supported version of Prime Video seems like a no-brainer, but is yet to emerge. Puzzling, until one considers this might stymy Prime membership growth, and that Prime customers spend $1400 per year, versus $600 for non-members.

Instead Amazon continues with what looks like an incremental BVOD play, selling inventory in -third-party apps available on Prime Video – a brand advertising product true to Amazon's principles, which doesn't impinge on its wider goals, but with a small addressable audience for advertisers as a result.

This unwillingness to pursue ad revenue at all costs is evidenced further by the lack of marketing initiatives for its advertising business. To date Amazon offers no free insight tools akin to Google Trends or Facebook Audience Insights, and it rarely contributes to industry events. One can only assume this underinvestment in marketing versus its rivals is deliberate. Amazon simply doesn't see it as an investment that will payback at scale.

2020 will undoubtedly be another year of stellar growth for Amazon Advertising revenue, but mid-term, the true test will be reducing reliance on search spend if its ad business is to payback to Amazon on an AWS-scale. The key to this will be whether Amazon can bridge the sizeable gap between its view on customer experience and how advertising works with the expectations of brands and agencies.

Expert commentary

How digital platforms are redefining convenience for a new generation of consumers

Sanjib Kalita
Editor-in-Chief,
Money 20/20

Digital platforms are built for the sociographic and economic profiles of their users. Credit cards and bank accounts had high penetration in the US, so Amazon could leverage those networks for payments and lending capabilities. In China, bank account penetration was far lower, requiring additional capabilities and investments such as Alibaba with Alipay. These factors forced Asian digital platforms to incorporate more services into their user experience while, in tandem, reducing friction with simpler communications and user actions.

Digital platforms fail if they can't attract third-party service providers and developers to create engaging new experiences, but there is often tension between being third-party friendly and the goals of the digital platform owner.

The rise of platforms means marketers may need to pick a side

Going back to the 1980s and 90s, we saw two different ways of managing this, with Apple maintaining a tighter grip on the Mac platform versus Microsoft's more open approach.

In general, Asian digital platforms are holding the reins even tighter than Apple did a couple of decades ago. Third-party providers often need to choose between the Alibaba or the WeChat platforms, and selecting one excludes the other. Didi Chuxing is one of relatively few companies to have successfully worked with both, and used this momentum to create its own platform.

Digital platforms have redefined convenience. Just as ordering from a mobile app can be more convenient than the traditional 'convenience' store, electronic payments connected to your digital identity is more convenient than using a plastic card. By eliminating the time between item selection and payment, digital platforms have maximised the opportunity for impulse purchases.

Digital platform data enables better identification, segmentation and interactions. Brands without adequate data about their prospects, customers and high value customers will be left flat footed. A coherent data and analytics strategy when engaging digital platforms is a key success factor. While developing deeper consumer and channel insights has been on marketers' agenda for decades, digital platforms take this to a new level of risk and opportunity.

More from WARC

Who we are

At WARC, our purpose is to save the world from ineffective marketing by putting evidence at the heart of every marketing decision.

We believe that effective marketing is based on facts and not opinions.

Since 1985, we've brought confidence to marketing decisions through the most trusted research, case studies, best practice, data and inspiration.

Today, we help 75,000+ marketers across 100+ countries. Our clients include the world's leading brands, advertising and media agencies, media owners, research companies and universities – including the top-five largest agency groups and top-five largest advertisers in the world.

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