Direct to Consumer Revolution
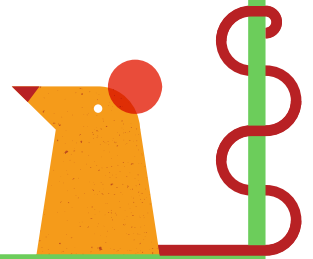
**How to innovate
in established markets.**
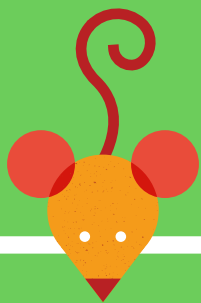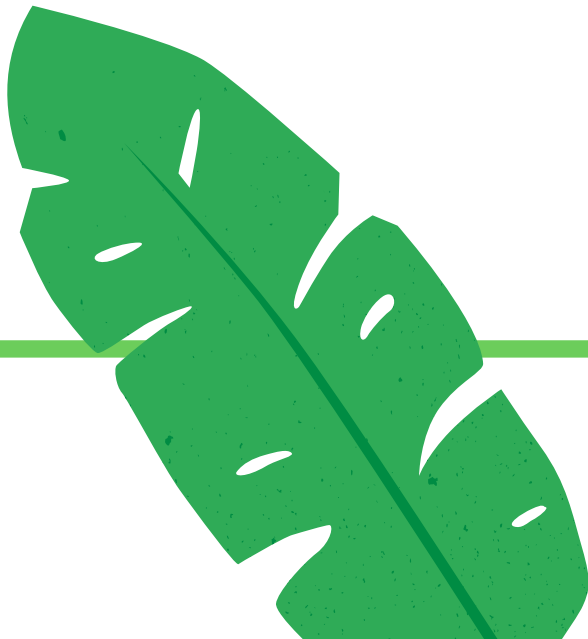
IMG—

More than 150 new mattress brands are invading the US market. From Nolah to Nest, from Cocoon to Needle, the mattress market is just one of the many established markets that have seen the rise of new non-traditional players over the last year.

Pans, suitcases, glasses, drinks, cosmetics: native digital and data driven brands that **disintermediate the supply chain** by selling directly to their consumers.

These new brands collect market shares, attract the attention of the market giants and begin redefining the entire product categories, always **starting from current weaknesses** in the "traditional" customer journey.

Furthermore they show a maniacal attention to details, targeted communication combined with the ability to **become relevant** to their customers, thanks not only to the product **but their service**.

Why Today

Technological and socio-economical evolution that led to today's market context.

In order to understand the actual context in which these unconventional players emerged we dive deeply into the **evolution of branding** by identifying four main phases to encapsulate the period from 1900 to nowadays. Each step brought about changes in various fields that impacted and disrupted the way companies developed, sold and communicated their products and services. Brands are constantly evolving to become more present in our lives than ever before, requiring a more coherent ecosystem and ubiquitous user experience.
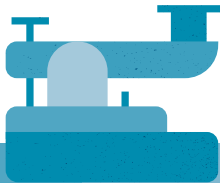
MASS PRODUCTION
1900–1950

– Invention of telegraph
– Great depression (1929)
– World Wars (1914–1918, 1939–1945)
– Shipping and manufacturing
  technology improvements
– First long-distance real time
  communication medium
– Shopping from necessity to entertainment
– From mom-and-pop stores to malls

MASS COMMUNICATION
1950–1990

– Golden age of television
– Telephone widespread adoption
– Economic boom (1950s)
– Cold War (1947–1991)
– Birth of big box retailer

Imagining the future

◂1900

1950
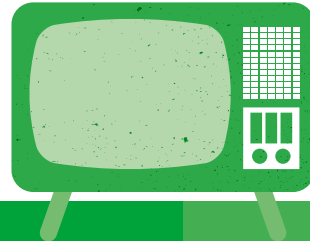
Branding focus:

PRODUCT

The role of branding was to design the way in which the product expresses itself. Branding at its early stages had functional benefits as its main focus: brands were first and foremost a way to signify and guarantee superior quality.

Branding focus:

MESSAGE

The role of branding was to shape the story behind the brand. Consumers weren't just buying a product anymore, but a whole storytelling behind it that elevated them as a status symbol and provided them with a sort of building block of their own identity.

MASS STANDARDISATION
1990-2008

– Mobile phones
– Rise of e-commerce platforms
– Amazon was born (1995)
– Birth of a new global culture
– Internet revolution
– Pizza Hut first online order (1994)
– First Apple Store (2001)

MASS PERSONALISATION
2008-TODAY

– Smartphones diffusion
– Birth of social media
– Sharing economy
– Great Recession
– Internet of Things (IoT)
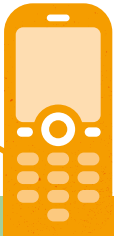– First iPhone (2007)
– Bonobos launch (2008)
– New players and one-to-one
  communication possibilities
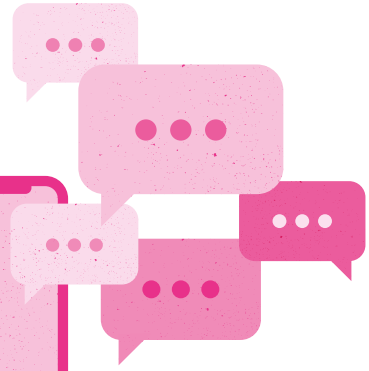
1990   2008   TODAY

Branding focus:

EXPERIENCE

Branding focus:

RELATIONSHIP

The role of branding was to orchestrate the customer experience in order to deliver value in each touchpoint. Product benefits are not just touted here and there, but they are proved and backed up by immersive and diverse experiences. Brand communication and content aren't one-way streets anymore, technological innovations allow for more interconnected journeys.

The role of branding evolved into managing the brand as the organizational principle that oversees each step of the value chain both internally and externally, from the way the company is managed to the way it relates to its consumers in each step of the journey.

The context has changed, branding also.

In this new context, branding no longer only means dealing with visual identity.

The brand becomes the organising principle of the whole experience.

Branding means designing the precept that coordinates and guides its manifestation at all the different touchpoints to guarantee effectiveness and consistency to the brand: from the business model, to the go-to-market strategy, from the logo design to the service model. Within the relationship between companies and customers, branding can play the caretaker role in every aspect, ingredient and activity that a company is pursuing.

New realities are entering established markets bringing disruption and showing how a vertical approach/vision in the way they develop, sell and communicate a product becomes a key aspect in the customer relationship. They are called **DTC (Direct to Consumer)** and everything they do is driven by core brand values that are crystal clear, well-illustrated and easy to understand.

Glossier.

"Skin care and Beauty Products inspired by real life"
Glossier has a strong and authentic brand essence that guides all the company's activities from product development to marketing and services (strongly community driven). Glossier describes itself as a "people-powered Beauty ecosystem" and this is communicated clearly by their content curation (frequently UGC) with a friendly and inclusive tone of voice. The way the brand communicates is an expression of their strong relationship with its customers.

151208_Glossier_20-2486.jpg

_skin first. makeup second.

Start with the most important thing: perfectly primed skin. Glowy, dewy skin is synonymous with Glossier, with products invented to bring out your best before reaching for makeup. Then makeup becomes the fun part, not the fix—as it should be.

_trust us, we're you

Most Glossier employees started out as customers. Which is why the team naturally takes a customer-minded approach to the work each and every day. Even if you're not looking for a career change, the Glossier ecosystem survives and thrives on a symbiotic relationship with you, and her, and her, and him. This is a group effort.

Healthy. Affordable. Sustainable.

Instead of making money by marking up products, we charge a flat annual fee of $59 and sell products for what they actually cost us to make. Skip the grocery store line and get products delivered right to your door.

30 Days Free

The highest standards.

We work obsessively to develop the perfect version of each product. Then we have our friends, family, and the pickiest people we know test every last thing. There's only one kind of each item in our store, so you're guaranteed it's the highest quality without the headache of comparing endless options.

Free 30 Day Trial

PUBLIC GOODS

"Better everything for everyone"
Public Goods' promise is to offer accessible high quality products to everyone with cheaper prices cutting out what it calls in its brand tag: "the hidden extra costs you typically pay for a retail brand". However, Public Goods is itself a brand, with a minimalistic visual identity and authentic tone of voice. The brand promise guides every activity of the company bringing consistency to its storytelling, social activities, and product offer.

What are DTCs?

Direct to Consumer brands are products
or services that are financed, designed,
(produced), marketed, (distributed)
and sold by the same company.
They bypass the middleman
and connect directly to consumers.
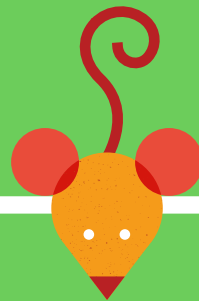
Which are DTCs' main features?

1 — Integrated value chain

In the past, a brand would maintain only design, production and part of its marketing activities. The second part of the value chain (operations and distributions) was run by wholesale partners and distributors, leaving them with a consistent part of the revenues. Direct to Consumer brands do things differently. They master everything from the design to the final sale, taking over every part of the sale cycle, owning the customer and keeping all the revenue.
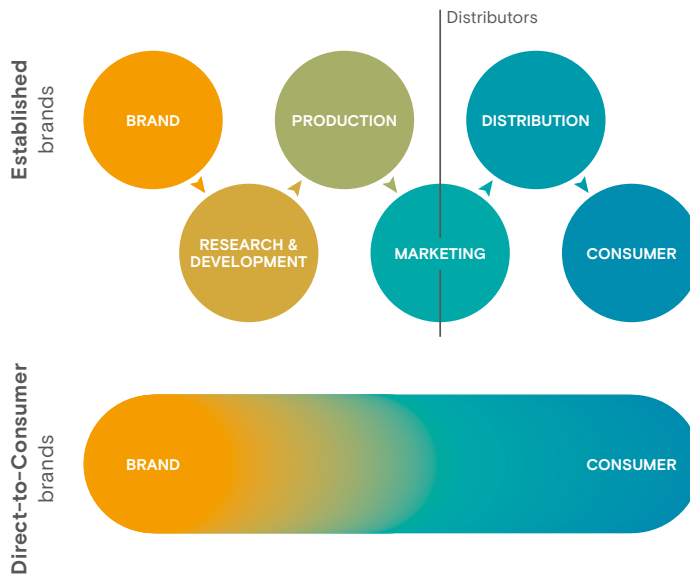
2 — Web native

DTCs are web native, they were born in an era where
everything is already digital, where they don't have to adapt
to a new context as established brands have to.
This means that various aspects like interacting, transacting,
and consumer storytelling principally take place via web.
A web-native company naturally speaks to millennials
and younger generations by perfectly surfing
new social and innovative trends.

3 — Commodity focused

Mattresses, contact lenses, razors, vitamins and so on, DTCs
are turning the tables and changing the way we perceive
common products. These kind of companies have identified
product categories that are lacking a strong brand identity
and communication strategy.
A DTCs' approach proves that even commodity products
can be charming to customers.
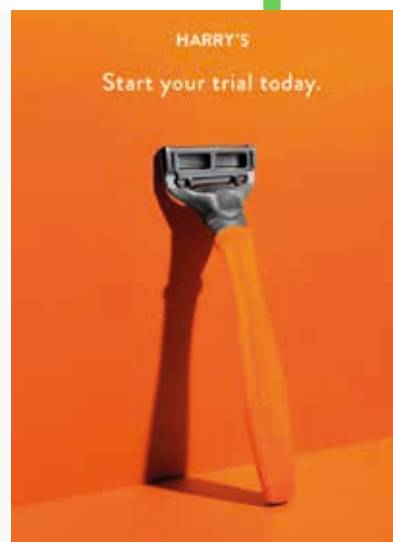
Which are DTCs' enablers?

Direct to Consumer and e-commerce brands
need a fertile ground with very specific drivers
to grow and spread into society.
FMCG e-commerce success is foremost correlated
with the presence of **these 10 drivers** in a certain
nation. As shown in the diagram, these are
foundational, macro, social and supply drivers.
For most drivers, the analysis developed
a "success threshold" indicator.

Nielsen, Future opportunities in FMCG e-commerce.
Key drivers of FMCG e-commerce success, September 2018

Ease of doing business

GDP

Bank account penetration

Maturity of FMCG e-commerce players	**SUPPLY**
Trust / **Savings culture**	**SOCIAL**
Population density / **Postal reliability**	**MACRO**
Internet penetration / **Smartphone penetration**	**FOUNDATIONAL**

Direct to Consumer Revolution
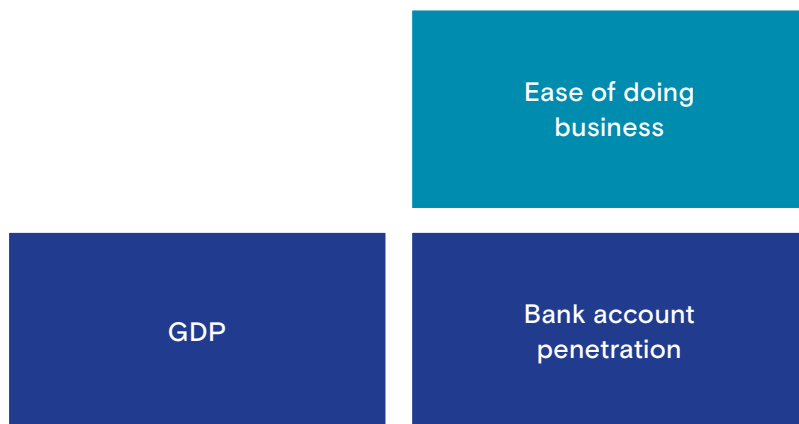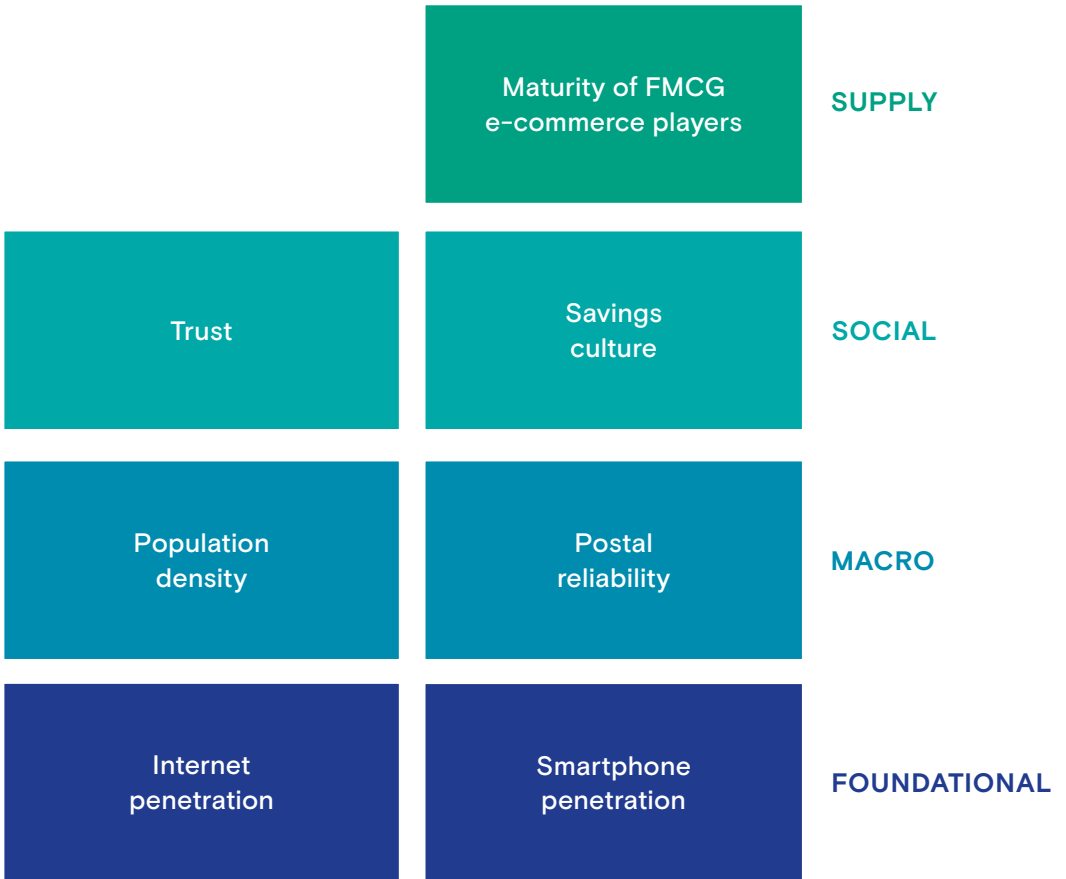
GDP

For players in e-commerce, opportunities and potential profits depend on market size. Bigger markets mobilise large investments in e-commerce technology that improves innovation and expansion of the online market itself.

The evolution of lead markets like U.S. and China not only generates the most FMCG sales but also represents a test of how e-commerce will evolve elsewhere. In fact, innovations like cashier-less supermarkets, dash buttons, meal kits, subscription boxes, predictive personalisation, and voice-activated shopping services originated in these markets.

BANK ACCOUNT PENETRATION

Markets that succeed at e-commerce tend to have very high levels of bank account penetration. This is because online payments through credit, debit card, and mobile wallets absolutely necessitate a bank account.

An example of the importance of bank account penetration is India, where in November 2016 the demonetisation in the country created an unprecedented surge in new bank account openings, steering to an estimated increase of up to 40% in sales volume for a leading FMCG e-retailer.

INTERNET PENETRATION

Internet penetration is directly linked to fundamental for the growth of the e-commerce market.

From 2010 to 2016, internet penetration in Russia jumped from 37% to 76% and was a key factor in driving e-commerce sales from around US$3 billion to approximately US$13 billion during the same period.

SMARTPHONE PENETRATION

FMCG e-commerce success has demonstrated to be heavily influenced by smartphone penetration, especially in those countries where smartphones are more accessible and cheaper than computers.

According to Nielsen's FMCG e-commerce study, the success threshold is at least 67% of the population possessing a smartphone.

MACRO

EASE OF DOING BUSINESS

E-commerce tends to be more successful in countries where establishing a brand is relatively easy. Even though many metrics of ease of doing business are related to brick-and-mortar, some measures are valid for e-commerce operations as well, for example, trading across borders, and paying taxes.

According to Nielsen's FMCG e-commerce study, the success threshold is a country's distance to frontier score being more than 773. Distance to frontier scores help assess economic regulatory performance over time, with 100 being the "frontier".

POPULATION DENSITY

High population density means significant savings in logistics and infrastructure costs since deliveries can reach more people in a shorter time requiring fewer stores and depots.

According to Nielsen's FMCG e-commerce study, the success threshold is a population density of more than 135 people per sq. km. In 2016, for example, more than half of FMCG sales in the U.S. were made in major cities in 8 states. The convenience of online FMCG shopping could also be lowered by a higher density of grocery stores, as it is in Germany, because of their accessibility.

POSTAL RELIABILITY

Once purchased, most e-commerce products are shipped through public and private postal services, which have to prove their reliability. Purchases are expected to arrive on time and in top condition, or consumers will stop buying online.

According to Nielsen's FMCG e-commerce study, the success threshold is a postal reliability score that is greater than 72. Standardised addresses and an efficient postal code system makes Singapore one of the best locations for e-commerce, also considering its incredibly dense population and its clever transport network.

SOCIAL

TRUST

In the e-commerce market, especially for FMCG fresh and frozen food, trust is crucial and depends on many aspects. In fact, customers want to be sure they are purchasing genuine products, delivered safely and on time following a secure payment process.

A lack of trust is seen as a significant barrier to e-commerce success in some Latin American markets. Customers there tend to be sceptical, feeling it is unsafe for unattended delivery items to be left on their doorstep. This means more delivery attempts are required, which in turn greatly increases the logistics' cost.

SAVING CULTURE

A strong saving culture is perhaps a surprising driver, but the data suggests that it's an important one. Markets in which the population saves more tends also to have more money spent online. Notably, these sales are generally not cannibalising offline sales, indicating that consumers are comfortable dipping into their savings for additional purchases.

According to Nielsen's FMCG e-commerce study, the success threshold is a household savings rate greater than 7.8% of net disposable income.

MATURITY OF FMCG E-COMMERCE RETAILERS

E-commerce market maturity is strictly connected with high online FMCG sales. The degree of e-commerce establishment in a market is a key driver of future growth, not just current success. E-commerce maturity measures how long e-commerce players have operated, their brand assortment, prices and deals, geographical reach, delivery time and options.

For FMCG Maturity and Trust, there was no specific success threshold used as the assessments of these two drivers were based on multiple indices and factors.

Direct to Consumer Revolution

How established market is reacting?

Gillette company's shares fell from 70% in 2010 to 54% in 2016.

Euromonitor said that the famous established razor brand market shares dropped in favour of DTCs. Gillette has lost market shares for the last six years in a row. Dollar Shave Club and Harry's rose to 12.2% from 7.2% in 2015. Gillette has had to cut its blade's prices by roughly 20%.

70% **59%** **54%**

2010   2015   2016
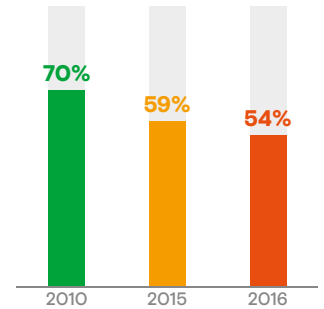
Roughly $4 billion in venture capital funding has been pumped into DTC brands.

88% of new products arriving on-shelf in the US from 2013 to 2017 came from **small** to **medium-sized companies**.

Courier Media magazine's recent article "Supermarket sweep: The new food upstarts" affirmed that a new generation of young and hungry food and drink founders are taking over and transforming the supermarket shelf. This is indicative of a wider shift in consumers' and retailers' shopping habits. Supermarket buyers appetite for what is novel or in vogue is growing. Furthermore, European markets are showing the same trend.

88%

Imagining the future
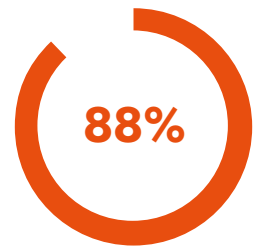
1 — Legacy brands going direct

Established brands are undertaking various DTC initiatives to stay relevant, others are acquiring data analysis companies and some others are starting to use micro influencers to be as granular as possible whilst improving their customer knowledge. L'Oreal, which in the past has been almost fully dependent on retailers to stock and sell their products, announced that their e-commerce sales rose by 33% year on year in 2016 and now account for 17.6% of their total sales.

NIKE: THE NEXT GREAT DTC BRAND

Nike's investment seems to be oriented to transform the company into the next great DTC brand. "CEO Mark Parker affirmed the aim is to use data to treat every one of Nike's millions of customers as a unique individual, which is why Nike announced that it had acquired Zodiac, a consumer data and analytics company. Parker explained that Nike had been already working with Zodiac for several months, using it to gain insight on its customers and how they behave".
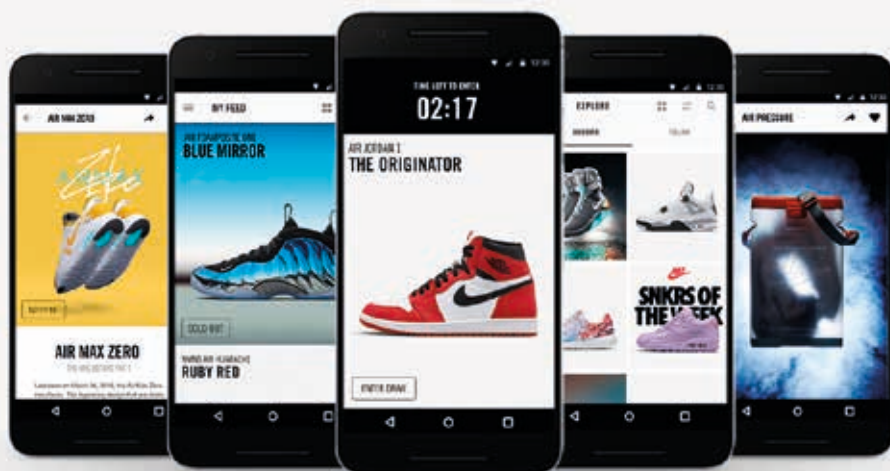
2 — Multinational corporations sue DTCs

Time and time again DTCs are eating up market share at the cost of traditional brands. The economic power of established international companies frequently has led to lawsuits, suing new-born brands in order to avoid the problem in the first place.

GILLETTE SUES HARRY'S

Gillette spent years trying to eliminate the new lower-cost alternatives. Initially the company tried to sue Harry's for patent infringement. The case was dismissed in less than a week. It then tried to copy Harry's website and tone of voice starting most of all to share fake news. The result of this ruinous strategy is ads for Harry's that have reached 5 million customers in less than 4 years.
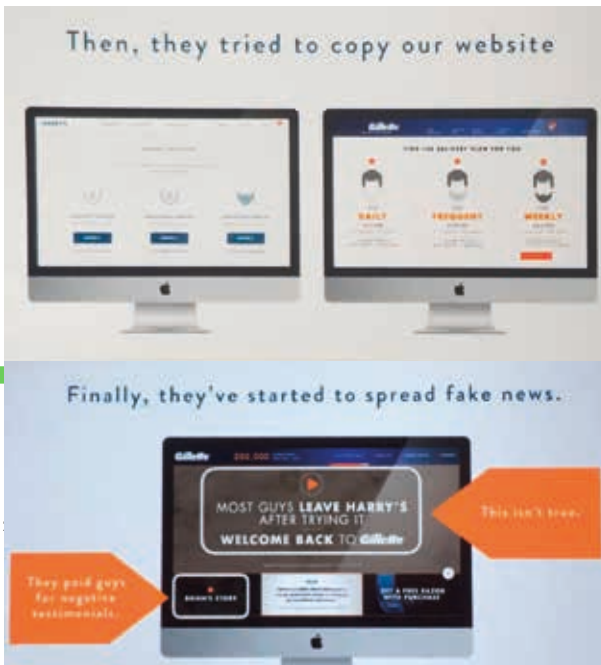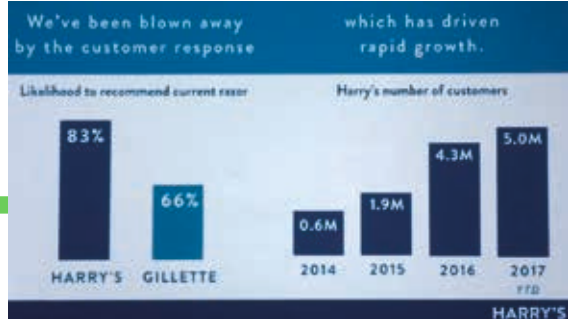
3 — Multinational corporations acquire DTCs

Sometimes the best and easiest way for established brands to become more innovative is simply to acquire new-born emerging companies.

DOLLAR SHAVE CLUB BY UNILEVER

In 2016 Unilever acquired DSC for 1 billion dollars and there are several reasons why.
The acquisition opened a new front in Unilever's ongoing battle with P&G (who have a different approach with emerging DTCs), it's aligned with Unilever's purpose of being a progressive global brand and last but not least it tactically wards off others from buying Edgewell Razors, potentially setting up Unilever to swoop for them at a later date in order to increase its scale.

NESTLE FOR FRESHLY

Nestlé USA has acquired a minority interest in Freshly, a provider of Direct to Consumer prepared healthy meals, which currently supplies consumers in 28 US states with weekly shipments of meals.
The investment by Nestlé helped to fund Freshly's construction of a new East Coast kitchen and distribution centre, as it prepares to expand towards a nationwide service.

What's the difference between DTCs and established brands?

How do they face every step in the process of creating and delivering goods, services and experience to their customers?

Research & Development

Imagining the future

DTC

CASPER

IN HOUSE R&D

What is the best sleep experience?
At Casper there is a team of designers,
engineers and researchers trying to understand
how to help people sleep better.

V

PEOPLE FOCUSED

" We go to people's home and talk to them,
we go shopping together, we go above
the surface, trying to understand what people
really need in a mattress "

Innovation can be brought by addressing the right need and identifying the right way to solve it. This phase includes all activities related to the framing of the target, the needs to be satisfied and the design of the product.

Product, service and brand design are the activities at the core of this phase, the backbone of the all customer experience is created here.

ESTABLISHED BRAND

EMINFLEX

IN HOUSE R&D

S

Material and technology research, expertise and know how are the core skills at The Technological Oasis of Wellbeing ("L'Oasi Tecnologica del Benessere"), Eminflex's R&D department. With a strong focus on material research and selection, they aim at creating high-quality mattresses.

PRODUCT FOCUSED

" 100% Italian mattress. Since 1973, Eminflex takes care of Italians' sleep through the design, selection and control of raw materials and processes useful for the production of quality mattresses "

What makes R&D different for DTCs?

DATA ORIENTED

Easy access to consumer data allows for a clear target understanding and a correct re-framing of the problem thanks to feedback loops.

FOCUSED TARGET

Choosing a niche or a specific target permits to understand clearly needs, expectations and pinpoints to be solved, from which the design phase can start.

CLOSER RELATIONSHIP

User involvement in the process, thanks to an easy feedback loop and an interactive dialogue grants users to ask and demand modifications or new product developments.

XP CONSISTENCY

The R&D team is dedicated not only to product development but their aim is to design the whole customer experience, which implies services and branding too, always starting from user needs.

It starts at our headquarters

Every Warby Parker frame is designed in-house, where our team puts together mood boards for inspiration, sketches initial designs, and maps out product details for prototyping

WARBY PARKER

At Warby Parker, as in most DTCs, products are designed in-house. From the definition of specific product features to the whole user experience. They aimed at simplifying the eyewear buying process by imitating a usual store experience, where sales assistants provide a limited choice.

#productinnovation

Direct to Consumer Revolution

THANKS, YOU ARE NOW ON THE WAITLIST.

We'd love to hear about your current shoe experience.
Please tell us a little more about yourself below.

QUESTION — 01
WHAT'S YOUR NAME?

E.G. JANE SMITH

QUESTION — 02
WHAT ARE YOUR MAIN EVERYDAY SHOES / SNEAKERS?

E.G. NIKE ROSHE ONE

QUESTION — 03
WHAT ARE YOUR PRIMARY USE CASES FOR SHOES?
(PICK YOUR TOP TWO DAILY ACTIVITIES WHERE YOU'RE ON YOUR FEET)

WALKING
STANDING (WORK, FWD, ETC., ETC)
HIKING
RUNNING
COMMUTING (BUS / TRAIN)
OTHER

atoms

Atoms, a sneakers DTC still at the beta phase, is allowing pre-orders and a waiting list for its product. By asking direct questions to interest future customers it is already gathering tons of information useful for the design and the production of its shoes.

#datagathering

Tortuga

Most DTCs were created because the founders were themselves in the condition of their future customers. The starting point of Tortuga was realizing that there is a living experience and a pain-point that could be fixed.

#immersivesearch

Casper

Rather than ask for an email address on their website, Casper incentivizes viewers to submit a survey about their sleeping habits, offering a $25 discount as a reward. In it, they ask questions about the preferred sleeping position, evening routine, as well as general demographic questions about age, income, gender, and more. At the end of the survey, they ask for the email, before offering the coupon code.

#datagathering

How can established brands gather more consumer data and use them to improve their offering and services?

How can they switch from a product focus
to a user focus approach and start designing
from user needs rather than product features?

How can traditional brands include the consumers'
voice in their design process?

How can they start to design focusing on the whole
customer experience and not only on the product itself?

Production

R&D

PRODUCTION

SALES

MARKETING

SERVICES

Imagining the future

DTC

HARRY'S

PREMIUM MATERIALS – PROPRIETARY FACTORY

Harry's was able to break the cycle of big brands
over-designing and overcharging their product by owning
one of the world best blade factories and focusing on high
quality, fair prices and customer satisfaction. Led from
the experience and the story of the factory, that is grinding
high-grade steel into sharpest blades since 1920, today,
more than 600 engineers, designers and production workers
produce millions of precision blades every year.

JOURNEY FOCUSED

" By buying our German factory we are able
to ensure quality by owning the entire process,
from grinding high-grade steel to directly shipping our
products to your door. This means
we can continually innovate to make
your shave even better. "

Collecting raw material from source partners, bringing them to the company and converting them into finished goods is the aim of this phase. The value of the production can be increased by improving the quality of raw materials and by keeping operations up to scratch: the product must be manufactured in the right manner and meet standards of high quality. A long lasting partnership is created by choosing the right materials and the right production partner, to guarantee the quality of the final product.

ESTABLISHED BRAND

GILLETTE

PREMIUM MATERIALS – PROPRIETARY FACTORY

700 people are employed in manufacturing,
800 in design, engineering and management.
Gillette's main factory is the place where both blades
and razors are designed and made. Having these two company
departments within walking distance allows for a quick and
cheap fine tuning of the machine.

QUALITY FOCUSED

" Oftentimes, the basis for our competitive advantage in a category is the process or manufacturing operation that allows us to make better quality than our competitors at a lower cost. "

What makes Production different for DTCs?

DATA ORIENTED

Having access to user data and future purchases, DTCs can easily predict production needs and endeavours, improving their warehouse system.

SIMPLIFIED PORTFOLIO

Having to work with a simpler portfolio compared to the one established brands have, allows for an easier management of the whole production flow.

STAND FOR SOMETHING

Most DTCs truly believe in an ethical approach and include it in their production phase, by choosing certified and sustainable materials and manufacturing processes.

CONTENT FOCUS

Full transparency on material sourcing and production are an essential added value for the end users.

Mother Nature is our muse. Building on her handiwork, we're finding new uses for materials that exist right in front of us. Like wool from merino sheep, who have the best hair in nature.

But even great locks need a trim from time to time. With fibers that are 20% the diameter of human hair, our superfine merino wool is breathable, temperature-regulating, and moisture-wicking, all without that irritating scratchiness.

If you'd like to actually meet our materials, then click here.

allbirds

The continuous research of the best materials and the best way to use it, in the most sustainable way. Allbirds sustainability effort is clearly stated as the meticulous search of the best material supplier. The manufacturing process is all about refining natural materials and utilizing them for creating the shoes.

#materialsource

EVERLANE

Everlane partners with the best, ethical factories around the world, sourcing only the first-rate and finest materials. Plus, they decide to share their stories with their consumers, in the most transparent way possible.

#bestpartners

OUR FACTORIES
Our ethical approach.

We spend months finding the best factories around the world—the same ones that produce your favorite designer labels. We visit them often and build strong personal relationships with the owners. Each factory is given a compliance audit to evaluate factors like fair wages, reasonable hours, and environment. Our goal? A score of 90 or above for every factory.

Learn more

Direct to Consumer Revolution

Materials	Labor	Transport	Duties	Hardware	True Cost
$18.25	$29.16	$1.47	$4.75	$0.00	$54.00

CUBITTS

HANDMADE FRAMES

Our frames are made in the traditional way and go through fifty crafted stages of production over a period of six weeks including four separate stages of polishing to ensure a glorious lustre. Most of our frames are constructed with custom Cubitts pins that secure right through the acetate - this is called pin drilling. This process is done by hand and takes more time and skill, but means hinges can be easily maintained.

Cubbits doesn't need a warehouse for the finished products but just a place to stock raw materials. In fact, every product is created starting from the customer's request, that can customise its eyewear with lenses and materials. Frames are made in the traditional way through fifty crafted stages of production, one of which is done by hand for most of the eyewear.

LENSES

We offer a wide range of prescription lenses, including single vision lenses, higher indices for stronger prescription, and progressives. Our sunglass offer full category 1, UV400 protection, including polarised lenses and Zeiss mirrors.

#warehousing

WALDO
DAILY CONTACT LENSES

At Waldo we are on a mission to give you the highest quality contacts without the hassle or the price tag.

Waldo has decided to partner with internationally recognised and certified suppliers. They've spent time analysing and selecting this partner because their goal was to make sure their lenses are of the very best quality on the market and at the cheapest price.

#bestpartners

Our factories

We have partnered with an internationally recognized and certified supplier. From our 'Super Fine Edge Design' which ensures maximum comfort and low friction to UV protection, we've worked hard to make sure our lenses are the very best quality.

How can established brands simplify their portfolio to ease production and answer specific needs?

How can they gather more consumer data and information to optimize and predict production efforts?

How can they adopt flexible manufacturing or a production system that can rapidly react to changes and still operate efficiently?

How can they show their commitment to social responsibility in order to improve the customer engagement?

How can established brands create coherent storytelling around their products' production?

Sales

R&D

PRODUCTION

SALES

MARKETING

SERVICES

Imagining the future

DTC

CASPER

MULTI-CHANNEL STRATEGY – CERTIFIED DELIVERY PARTNER

Casper started selling its products through strong
and effective e-commerce, and later moved to the physical
world, opening up a series of stores. The Casper Sleep Shop
in New York is their flagship. It has six bedrooms,
each furnished and designed differently, where customers
can literally get into bed to test mattresses, pillows, duvets,
and sheets. When it invested in Casper, Target also acquired
the chance to get Casper mattresses into its stores
nationwide: a top brand selling well in its stores.
Casper partnered with UPS to deliver their mattresses
that come rolled up in a box. Deliveries are free
and would ship within 2–5 days.

EXPERIENCE FOCUSED

" It's always bedtime at Casper Stores.
Swing by to try and pick up our mattresses
and other sleep products. "

Brands these days are using different business models to drive their sales, merging channels and services with selling and pricing strategies. Product delivery in this phase is key: the value chain receives a boost if the logistic activities are carried out in time with optimal costs and the product is delivered to end customers with minimum impact to the quality of the product.
E-commerce, retails, social network. The analysis of every touchpoint and selling strategy that brands use to propose and deliver their product to the public.

ESTABLISHED BRAND

EMINFLEX

MULTI-CHANNEL STRATEGY – PROPRIETARY DELIVERY SERVICE

Eminflex's main selling strategy is to propose its product through TV commercials, paired with e-commerce and the re-sale by third party retailers. Time based promotion is the business model they adopt to convince people to fall for their products. The company delivers the product itself and shipping time can range from 7 to a maximum of 45 days depending on the mattresses' dimension.

S

PRICE FOCUSED

" Only for today, 60% off on every product.
Come and meet us in our showroom
to check out all our promotions. "

What makes Sales different for DTCs?

DIRECT SELL

Proposing and selling products directly to the customers allows not only control over margins but to provide excellent delivery services too, with dedicated packaging and the customisation of delivery options.

XP CONSISTENCY

For DTCs being digitally native doesn't only mean to have their own e-commerce platform. There's something more. To stay relevant and increase the brand awareness they adopt an omnichannel approach, being present when and where their customers need them, either on the go, via mobile or as a physical presence.

DISRUPTIVE BM

DTCs normally choose innovative business models as subscription or freemium models. All this enhances influence, other than the price and the revenue, the brand perception, and experience of the customer.

PHYSICAL XP

DTCs are revitalizing brick-and-mortar. Digitally native retailers are opening up physical retail locations, but with their own spins. The main goal of these spaces is to make people experience the brand and create awareness about value and offer.

#myparachutehome

Our customers have great taste. So we made it easy to steal their looks.

PARACHUTE

Parachute's online channel is the main channel to buy their amazing linen. Even if the customer is not actually touching and feeling the quality of the product, it can be easily understood from the pictures, other than imagining it in their home thanks to inspirational references.

#mainchannel

BIRCHBOX◆

At Birchbox stores customers can sample products, get their nails and hair done and take a variety of courses on makeup, skincare and hair styling at the Birchbox studio. La Fabrique is the place where customers can create their own beauty box by picking the samples they want to try. Online customers can be frustrated not to be able to choose brands and products, the situation is different here: clients are totally autonomous and free to try what they like.

#experientialbrickandmortar

Direct to Consumer Revolution

Forever useful, always delightful

43

delivery services

On this page you'll find a breakdown of our different delivery services that we offer, along with costs, delivery times, and any other details you need to know.

As soon as each of the items in your order has left our warehouse, we'll send you an email with a tracking number in it so you can keep an eye on your delivery.

standard delivery

- Delivery within three working days of placing your order, between 8am and 7pm.
- Our standard delivery service is completely free.
- Available for all our products except our bed frames (see '2-man delivery' below).

choose your delivery slot

- Delivery on a day of your choice.
- You can choose to receive your package between 8am and 7pm (from $6)

Eve chooses trusted partners for its delivery services, such as UPS and DPD Express, with different shipping and delivery modalities. A branded internal service is used to deliver urban packages reachable with a courier by bike. Sustainability is always at the core of every activity they do.

#frictionlessdelivery

Ritual

Ritual offers a vitamins subscription plan in order to support women's wellness routines. Moreover, they know that sometimes vitamins can pile up, for this reason they anticipate a customers need allowing users to pause orders whenever they want through their account page.

#personalizedservice

How can established brands adopt an innovative and disruptive business model to increase customer engagement?

How can established brands innovate their digital channels in order to be more relevant for their customers?

How can they provide an exceptional delivery experience?

How can they redesign their stores to provide an experience and not just sell products?

Marketing

DTC

AWAY

CURATED STRATEGY

Away adopts a 360° marketing approach, lifestyle oriented, with key elements such as their successful web and print magazine about travel tips and experiences, a clear, fresh and fashionable social media strategy, supported by influencers and strong visual content curation. Other than eye catching designed print and online advertising oriented towards millennials.

LIFESTYLE FOCUSED

V

" We live in an age of access. Anyone can go everywhere. The world is a shared place, and every trip is part of the exchange, no matter the destination. We believe in making connections: on the road, online, and in person. We value access over aspiration, and exploration over escape. For us, all time away is time well spent. "

Marketing applies a "push and pull strategy" to increase the sales of the offerings of a brand. Marketing must build brand equity in the right way without false promises to add value to the end product and the brand. Social networks, advertising, branded experiences and everything that can be used to convey a brand's message and its offering.

ESTABLISHED BRAND

RONCATO

CURATED STRATEGY

Roncato marketing strategy efforts are split into different and separated compartments: printed adv, online campaigns, posts on social media, showing different contents for different targets and collections. Their blog provides excessive informations related to airlines rules and new collections.

PRODUCT FOCUSED

"

We believe we can create a product with a strong impact and quality. The "made in Italy" product contains all our craftsmanship.

"

What makes marketing different for DTCs?

CONTENT FOCUS

Marketing content aims to inspire and provide a lifestyle vision. The goal is never the sale or the explanation of the product, but the context in which it can be used. Plus, these brands are becoming publishers themselves of high-quality sharable content.

XP CONSISTENCY

Branding, messages, values are consistent in all DTC adv campaigns, content and marketing activities are not designed and tailored for a specific collection or product.

CLOSER RELATIONSHIP

Customers want to be engaged and be part of the brand they love and with whom they share values. They want to participate in their extra activity, want to receive special treatment as being part of their community.

DATA ORIENTED

Knowing your customers through data permits to adapt and tailor the message and the promotions according to their preferences and attitude.

MARKETING

FLOYD

"In the last Airbnb I stayed in, I loved the bed so much that I messaged the host asking for the brand –and then I bought it!"
Floyd addresses young urbanites and millennials and selected Airbnb, the home rental company, for some of their favourite listings and offered to put its trademark bed in their rental homes throughout U.S. and Canada. The goal was that design–minded guests take notice.

#experientialmarketing

LIVELY

"Become a LIVELY ambassador and join this movement of wild hearts and boss brains!"
Lively gives its customers the chance to become their ambassador. This means being part of a community made by smart, strong women doing the things they love with the people they love. It means sharing the #GivingLIVELY philanthropy moments, growing one's own social presence, getting first access to all company launches, and being in the know before everyone else.

#customerengagement

Glossier.

Glossier's successful and excellent marketing strategy relies on the idea that makeup and beauty are everyday things and therefore it should be easy to use and affordable. They were able to fill the gap in the industry building on feedback gathered from real people who cared about beauty and makeup and tried their products first-hand. Everything Glossier creates, from packaging to products and services, is a result of crowd-sourced feedback.

#usersuggestion

BRANDLESS™

Inspirational and bold adv. billboards spread through the streets of the main US cities. Brandless is a self-described "group of thinkers, eaters, doers, and lovers of life with big dreams about changing the world". And it's clear from their advertising statement, where the focus moves from the brand to the quality of the product.

#boldadv
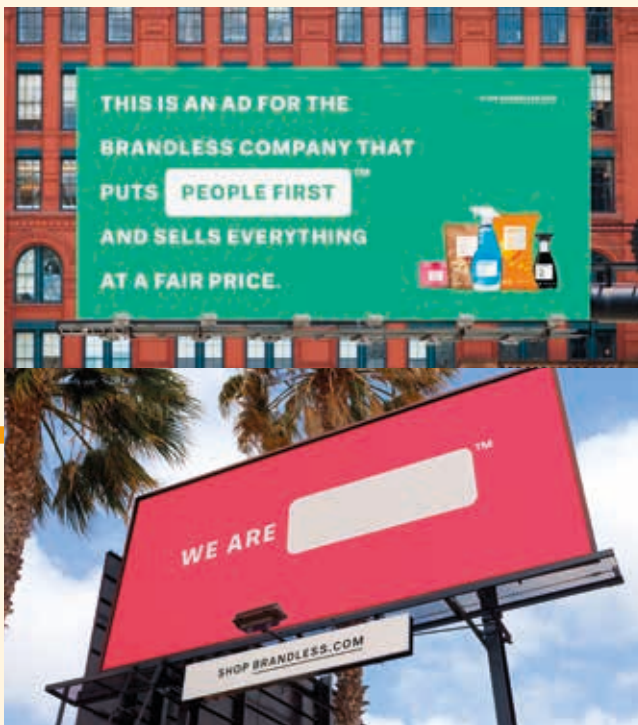
ONCE I TAKE MY MATTRESS OUT OF THE BOX, HOW LONG DOES IT TAKE TO EXPAND?

Once you take your mattress out of the box, it will expand and be ready to sleep on within minutes. Please note that some mattresses may take longer to expand.

We want to see you capture the magic! Document the process in an unboxing video and tag us in it @casper.

Casper

Casper was able to transform something as boring and painful as unboxing into a memorable, share-worthy experience. What they do is to encourage their customers to document their unboxing experience on their FAQ page, under the section 'How long does it take to expand?', and then share them on social media. Casper's unboxing videos got so popular that they resulted in free publicity for the company, thanks to millions of views on YouTube.

#usergeneratedadv

allbirds

Allbirds chooses carefully its partners and creates initiatives and projects together with brands with whom it shares values and lifestyle, as with Air New Zealand or Shake Shack.

#partnership

Ubud →

Lisbon →

The Day Trip: From Ubud, Bali to the Jatiluwih Rice Terrace

A photographer shares his itinerary, from where to eat and how to get there.

← / →

AWAY

Here Magazine, Away's blog, tells compelling, thoughtful, and unique travel stories through the lens of local, creative, and influential people. It started as the stories and pictures the founders picked up on the road and shared with their immediate circles and then grew into something bigger. Customers can get the magazine in print, online, and sign up for the newsletter and also get it in their inbox.

#editorialcontent

Imagining the future

How can established brands start talking and interacting directly with their customers?

How can they make a more coherent, meaningful and consistent use of every communication channel?

How can they become a source of inspiration for their customers?

How can they improve their customer engagement and awareness through editorial content?

How can they leverage on user content generation?

Services

Imagining the future

DTC

GLOSSIER

BEYOND THE BASIC

Glossier goes beyond standard services related to customer care and elevate themselves thanks to a series of activities like 30-day free return of the product, Glossier Rep - a program to become brand ambassadors -, downloadable contents such as music and wallpapers, personalised consultancy through email and in-store. More than a strong and engaging community.

NEED FOCUSED

V

" Real people share their real life routines. We asked our community to share how they use Glossier. "

Services are the most important added value that a brand can offer. They directly affect the customer experience and the brand and product perception. They engage the consumer. But if the service is not up to scratch, no one will buy the product and the brand will lose market share in favour of competitors. From basic service offerings to extra uncommon features.

DEBORAH

BEYOND THE BASIC

More than traditional services such as standard 14-day return and a customer care service available for any questions and issues through email, Deborah proposes a Makeup Academy for customers that want to learn the art of makeup.

S

EDUCATIONAL FOCUSED

“

Not only a Makeup Academy,
not just theory, but a 360° overview to the art,
cinema, theatre, music and passion
that moves a Makeup artist.

”

Direct to Consumer Revolution

What makes services different for DTCs?

STAND FOR SOMETHING

Sustainability and ethics are core values for most DTCs. Values that they want to share and communicate with their customers. But they don't stop there. They act to fight poverty, pollution, war… Through dedicated initiatives they try to make the world a better place, by partnering with associations around the globe.

DIRECT SELL

Each DTC chooses the business model that best fit its needs. The product is never sold alone but is always part of an ecosystem. Selling or providing not only products but services too, from trial periods to product personalisation, will provide more value to the user experience of the brand.

CLOSER RELATIONSHIP

The aim of DTCs is to make the customer feel special, unique and to have a direct and close relationship with them. Not only with a tailored communication but with dedicated and personalised services also.

XP CONSISTENCY

DTCs not only provide consistency in their product and communication but in the services they provide as well. All ingredients aim to propose a shared set of values and messages.

Outdoor Voices

"Hey, hi, hello! Let's get outside and play! 90% of Americans spend the majority of their time indoors – we can change that by #DoingThings".

Outdoor voices, a brand of sport clothing, is not only products and stores. It's a community that gather together to play and do sports, thanks to a calendar of events and classes.

#events

SoulFull at Seaholm

Hey, hi, hello!

We're partnering with Lizzie Agative for a series at Seaholm Power's lawn for a "SoulFull at Seaholm" yoga series. All are invited to donate to the instructor's charity of choice.

All levels welcome. RSVP via the link below!

Music by SWATLO, goodies from Outdoor Voices, SoulFull, High Brew Coffee, and Bumble BFF.

Coming Soon

Yoga and Chill with @CBQUALITY + @kandii Skincare
Monday, March 4th 9:30 AM at OV Austin

Mat Pilates Flow on the Lawn
Tuesday, March 5th 5:30-6:30 at OV Austin

OV Joggers Club
Wednesday, March 6th 7:00 AM at OV Austin

Vinyasa on the Lawn
Thursday, March 14th 9:30 AM at OV Austin

OV Foam Rolling and SOS Lounge
Friday, March 15th 6:00 AM – 7:00 PM at OV Austin

Hustle with Dance House Fitness + @INDOOR
Saturday, March 16th 9:30 AM at OV Austin
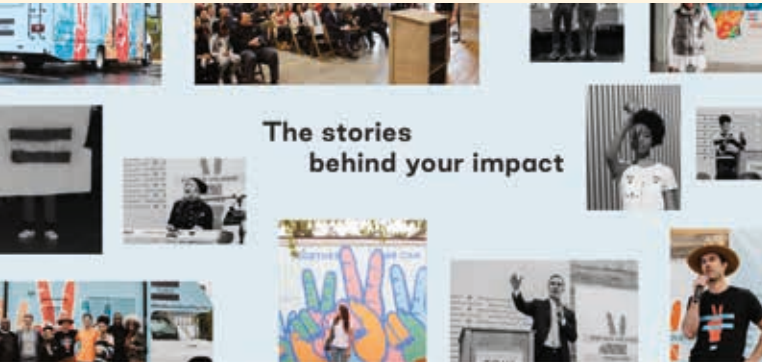
The stories behind your impact

After Route 91
A conversation with survivors of the Las Vegas shooting

How Love, Peace, And Healing Can Break The Cycle Of Violence
A conversation with Pastor Mike of LIVE FREE

TOMS

With every purchase made with Toms, people can truly help those in need of shoes, eyesight, water, safe birth and being bullied in over 70 countries around the world. Beginning with the project One for One, it is the first project of this kind and Toms was one of the first brands that decided to donate one pair of shoes for every pair bought. From there they expanded their ethical projects and gave birth to other initiatives.

#ethicfirst
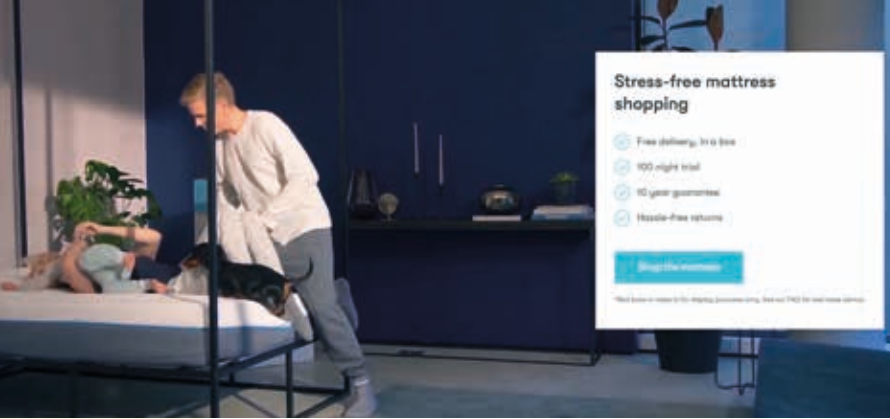
Stress-free mattress
shopping

- Free delivery, in a box
- 100 night trial
- 10 year guarantee
- Hassle-free returns

About my Order

Returns & Refunds

Is there a trial period for Simba bedding and pillows?

I want to return my order how do I request this?

Are returns free?

Do items need to be repackaged before return?

How does the refund work?

Who will remove my mattress if I decide to return it?

Order Help

Can I get more information on how many instalments are left and pay the balance off?

How does Refer a Friend work? I've referred my friend and they've placed an order but I haven't heard anything?

I have some questions about my Simba but I didn't order through your website, who do I contact?

Delivery Changes

I used the wrong delivery address. How can I change it?

Can I add additional delivery info?

Can I choose a delivery time and date?

Can I leave with a neighbour?

Do I need to be home and sign for my delivery?

What if I'm not home when the courier attempts to deliver?

SIMBA

From customer care to free return, every single aspect of the user experience, from when the order is placed to post-delivery, is taken care of, explained in detail on the website and supported by a live chat. Simba also adds a 100-day trial to understand if the mattress is the right one for the customer.

#basicservices

NORDSTROM

Nordstrom provides compelling outfits to people looking for style, not just fashion. Basically it is a stylish boutique with no clothes and an online shop with a selection of almost 300 brands. The offer includes clothes, accessories, bags, shoes, beauty, home decoration, stationery and technology.

Moreover with its Trunk Club customers can book appointments with a personal stylist (no queue, no crowd). They have one-to-one time to build their style and outfits (they can bring a friend for extra help). Selected items, other stylist suggested pieces and personalised clothes will be shipped home.

#relationship

How can established brands enhance the experience and strengthen the relationship with the user thanks to engaging extra services?

How can they include services in their business model?

How can they include their values
and belief in the services they propose?

Features sum up

R&D

DATA ORIENTED

- Target understanding
- Problem re-framing
- Feedback loop

FOCUSED TARGET

- Niche, specific target
- Painpoints and needs
  as a design starting point

PRODUCTION

DATA ORIENTED

- Effort prediction
- Warehouse optimization

CONTENT FOCUS

- Material sourcing and production
  as storytelling elements showed
  with full transparency

SALES

DIRECT SELL

- Control over margins
- Excellent delivery services
- Dedicated packaging,
  personalization

PHYSICAL XP

- Make customer live the brand
- Increase brand awareness

MARKETING

DATA ORIENTED

- Tailored message to one's
  preferences and attitudes

CONTENT FOCUS

- Lifestyle content
- Editorial content

SERVICES

DIRECT SELL

- Pre and post sales services
  to be added or substituted to
  the selling of the core product

STAND FOR SOMETHING

- Sustainability and ethic
  partnerships and initiatives

XP CONSISTENCY

- User starting point to design branding and services too

CLOSER RELATIONSHIP

- Feedback loop
- Interactive dialogue
- User demand into the process

STAND FOR SOMETHING

- Sustainable material sourcing
- Certified partners

SIMPLIFIED PORTFOLIO

- Fewer products
- Specific need solved
- Easier management of production

XP CONSISTENCY

- Brand is present on every touchpoint to be where the customer needs

DISRUPTIVE BM

- Influence on price and revenue and brand perception

XP CONSISTENCY

- Brand adv, not product adv

CLOSER RELATIONSHIP

- Customers want to be engaged and take part in the brand activity
- Community
- User generated content

XP CONSISTENCY

- Services aligned to brand values and beliefs

CLOSER RELATIONSHIP

- Make the consumer feel special and unique
- Personalized services
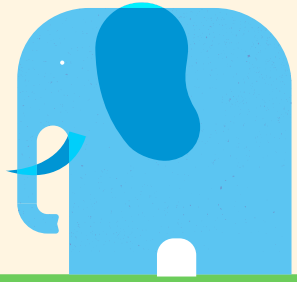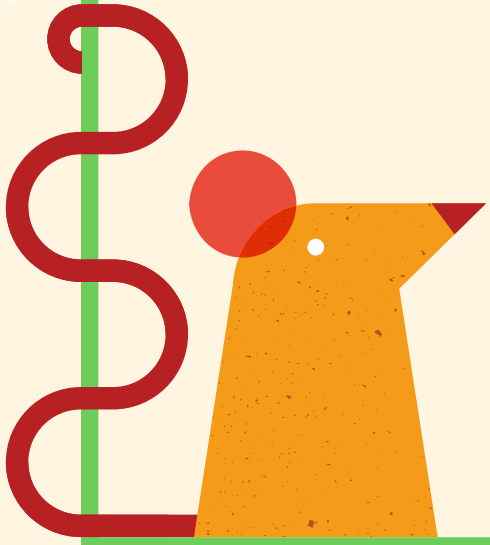
Both DTC and established brands:

➜ have internal departments dedicated to R&D.

➜ choose high quality materials and directly follow the production phase, either owning the factory or partnering with the best producers.

➜ offer high quality delivery solutions and adopt a multi-channel selling strategy.

➜ adopt a curated marketing strategy.

➜ go beyond basic services offering extras.

But they take it on in a totally different way.

Data oriented

Customer data gathering is changing the way products are designed and marketed. Selling directly through digital channels to customers opens up opportunities to measure everything in their purchase and experience journey other than giving the chance to iterate on the funnel and on the products themselves.

OFFER HIGHLY-DIFFERENTIATED PRODUCTS WITH HIGH PRODUCT MARGINS;

INVEST ONLY IN ZERO-SUM MARKETS (A CUSTOMER BUYING YOUR PRODUCT MEANS THEY STOP BUYING YOUR COMPETITOR'S PRODUCTS);

CHOOSE CATEGORIES WHERE INCUMBENTS SELL ONLY THROUGH RETAILERS AND HAVE NO DIRECT RELATIONSHIP WITH THEIR ACTUAL CUSTOMERS;

CHOOSE CATEGORIES WHERE INCUMBENTS OVERLY DEPEND ON BROADCAST ADVERTISING;

LOOK FOR PRODUCTS AND SERVICES WHICH GATHER USAGE DATA AND UTILIZE MACHINE LEARNING TO IMPROVE OVER TIME.

R&D

PRODUCTION

SALES

MARKETING

SERVICES

Imagining the future

> " We try to deliver dinner as well
> but the customer didn't respond well.
> They said yes in surveys but then
> we received only 3% of orders.
> You always have to test your services to
> understand what works best.

STEFANO CAVALERI, FOORBAN

Direct To Consumer
ITERATIVE APPROACH

R&D	PRODUCTION	SALES	MARKETING	SERVICES

This approach to User Data allows the company to obtain predictive data
(order behaviour, user base, geographic info) that represent an economic advantage
that impacts on production and R&D. Most of all DTC companies have an infinite
product iteration (thanks to constant feedback and direct relationship with users)
and a better customer engagement and a deep understanding of user needs.

Established brand
STATIC APPROACH

R&D	PRODUCTION	SALES	MARKETING	SERVICES

Because of the intermediary filter established companies can't get enough data
and feedback for a fast and agile product iteration. Most of all, in order to obtain predictive
data companies, they must invest in market research and consultancy agencies.

How to create a consistent omnichannel experience?

	WHERE DTCS GET DATA?	HOW DTCS USE DATA?
R&D	– Survey profiling through company website – User research – Prototyping	– Product development based on real user needs – Infinite product iteration
PRODUCTION	– Sales – Marketing – Services – Users location	– Predictive demand of specific products
SALES	– Branded E-commerce – Branded retail – Delivery feedback – Unboxing data	– Search behavior – Purchase behavior – Wishlist – Service improvement
MARKETING	– Social media content strategy – Company website – Newsletter subscription – Interactive Adv	– Detailed user profiling – Social media behavior – Engagement and feedback – Online advertising
SERVICES	– Interactive and direct customer care on every step – Proactive feedback request	– Experience feedback – Product feedback – Usage behavior

ITERATION

WHERE ESTABLISHED BRANDS GET DATA?

HOW ESTABLISHED BRANDS USE DATA?

– 3rd party retailer
– User test
– 3rd party market research

– Product development

– 3rd party retailer
– Flagship stores
– Market research

– Predictive demand products

INTERMEDIARY FILTER
Relying on third parties won't allow for a full understanding of the user behaviour and personal data, providing a partial visibility.

– 3rd party retailer
– Flagship stores

– Purchase behavior

– Market research
– Social media content strategy
– Company website

– High level personal data

– Traditional customer care

– Experience feedback
– Product feedback

Focused target

As users–need–driven and digital native companies, DTCs have the possibility to base their communication approach on a digital–first strategy that naturally speaks the language of a younger generation. Besides, DTCs offer solutions to specific needs and consequently, this means speaking to a specific target.

Living in an economy of unlimited choices, consumers only desire the best. DTCs tackle people uncertainty by reducing choice and focusing on a single product.

Millennials grew up during the recent global crisis that left them with less wealth. This, combined with a new wave of Minimalism, led consumers to pick a few selected products that are worth the spending. Therefore, DTCs compete to design and manufacture that single product with the best services surrounding it that would make it the definitive choice for everyone.

02

"

It is aimed squarely at millennials and digital natives. It doesn't have to adapt to the future, it is the future. It doesn't need to get younger customers. It starts with younger customers.

ANDY DUNN, BONOBOS

"

Thanks to a direct approach we can offer high quality at a lower price for the consumer. Cutting out the middleman we are able to provide people with a product that they normally can't afford.

CARLO BATTAGLINO, LIRECENTO

Direct to Consumer Revolution

Closer relationship

While the brand is always there for its customers, people want to get involved in brand activities that share their values and in which they strongly believe. Giving feedback, recommendations, generating contents, they want to be part of the community and influence product production.

How to strenghten customers' relationship?

Imagining the future

SHOW PERSONALITY IN MICROCONTENT

Microcontent is a great copy opportunity to engage customers on an emotional level, the most enduring and strong connection possible. Excellent copy shows a solid branding and alignment with brands' messaging.

BUILD A FEEDBACK LOOP PAIRING REWARDS WITH REQUESTS

To raise customer engagement impact, rewards and incentives can be offered in exchange of requests for reviews or other user-generated content.

> "Our main goal is to be close to our target, to create a community around our product. If we receive a feedback today, it is in the kitchen right away and solved the day after. It's a direct link between us and our customers.

STEFANO CAVALERI, FOORBAN

SHARE REVIEWS ON SOCIAL PLATFORMS

People are more likely to relate to content generated by real users or peers rather than brand messaging. For this, reviews are a powerful tool to re-engage customers, increase conversion rates and raise brand awareness.

CONNECT CUSTOMERS THROUGH SOCIAL Q&A

Customers should be allowed not just to ask questions, but also to answer other users' doubts with their personal experience. So reliable, real-time responses are guaranteed and the brand connection feeling gets strengthened.

ENCOURAGE BRAND ADVOCATES

Building a strong relationship with social media fans creates a powerful community of brand advocates. This type of long-term engagement may not show loyalty through repeated purchases, but will create new traffic through word-of-mouth advertising.

SPONSOR RELEVANT PERSONALIZED ADS

In a worlds dominated by marketing slogans, a great strategy in order to stand out is to offer real-time personalised deals and content marketing, becoming relevant for customers when they need it.

GET INSPIRATION AND OPINIONS FROM CLIENTS

Asking customers' opinions about current products and future ideas makes them feel a part of the buying process, reinforcing their sense of commitment.

MAKE CUSTOMER SERVICE OMNICHANNEL

Learning about customers provides valuable insights and ensures that opportunities are never missed to impress and delight them. Doing it on different channels will provide real, long-lasting engagement.

Direct to Consumer Revolution

Experience consistency

One of DTCs' major strength is to control the entire customer journey through an omnichannel approach, reinforcing the bond with consumers and enabling a unique coherent experience where key messages are reiterated.
In order to achieve a consistent experience, they strongly rely on visual appearance and a great coordinated set of values, planning each step of the customer journey along the same organisational principle.

How to create a consistent omnichannel experience?

DISCOVER WHERE YOUR AUDIENCE IS

An omnichannel strategy should begin with a clear idea of where the brand customers are, to know on which channels to focus their efforts. Find out which platforms customers frequent, which mediums they use the most and which devices they use. The goal is to have a clear idea of where they hang out, and where they normally shop.

R&D

PRODUCTION

SALES

MARKETING

SERVICES

Imagining the future

"

Packaging, label, communication.
We are detail obsessed.
All this comes with a cost but
has a return that is priceless

CARLO BATTAGLINO, LIRECENTO

"

Food quality is not enough.
You need to have the right tone
of voice, the right choice of photos,
a well-defined style. If your product
is delivered in time in a nice packaging,
with a gadget, the dish is already tasty.
Even before trying it.
Everything needs to be coherent
and to aim at solving the same need.

STEFANO CAVALERI, FOORBAN

Direct to Consumer Revolution

CONVERT ALL TOUCHPOINTS INTO SHOPPABLE ONES

Going with an omnichannel retail strategy means that all of your touch points should be shoppable. Nordstrom for example has taken care to ensure that its customers enjoy their shopping experience regardless of how they choose to shop. Besides having a brick-and-mortar store and an online store, the brand has made it possible for customers to buy directly from Instagram.

ENSURE A SMOOTH TRANSITION BETWEEN ONLINE AND OFFLINE

When brands utilize both online and offline touchpoints, it's important that they bridge any gaps that exist between them. The aim is to ensure a smooth and seamless transition between the activities happening on both channels provinding a coherent and painless experience.

Simplified portfolio

AWAY

DTC

3 premium luggage editions

RONCATO

ESTABLISHED

17 collections of luggage

05

E-commerce platforms do not have to worry about shelf space. They can exploit all their infinite space for tons of products, also ones that normally aren't chosen by brick-and-mortar retailers. The public could have access to a huge set of products, but is that the way they want or need?
Most DTCs decided to adopt an opposite approach, by offering a few or even a single "best" product to cut through the noise and get people's attention. By focusing only on a few DTCs manage to constantly improve products and production thanks to customer feedbacks as well as helping the customer in the decision process.

DTC
2 mattresses
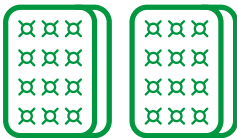
ESTABLISHED
7 different
mattress editions
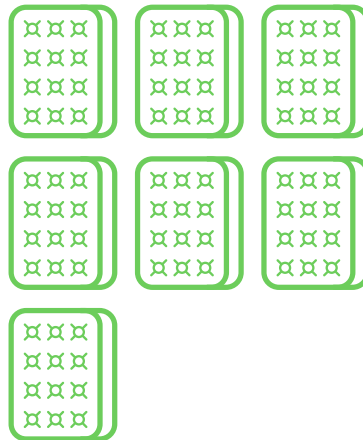
Stand for something

The way DTCs operate in all stages of the value chain aims to be as sustainable as possible,
and part of their profit is dedicated to supporting various charity campaigns. They realized that people want to see responsible companies that care about what they do and behave differently from the established ones that keep "trade secrets". Transparency, sustainability, and ethics distinguish these new companies from legacy brands that are focused only on profits.

Imagining the future

TRANSPARENCY EVERYTHING

Standing for something is nothing if you don't speak honestly and show everything to your customers. Successes and mistakes, production secrets and material partners. Every detail, component and ingredient of a brand is open, shared and available to the customer.

MATERIAL SOURCE AND PRODUCTION

Sustainability is key, especially when it comes to material source and production methods. Choosing the right partner, with whom you share values and beliefs, and adopt the most sustainable and energy savvy production techniques allow the placing of a more ethical product on the market.

06

" Being ethical and sustainable is one of our goals. We activated the Green Friday program where for every bag that people bring us back they receive a 1 Euro discount on the next purchase. We try to educate people by giving them something back.

STEFANO CAVALERI, FOORBAN

" It's really an opportunity to bring the mission to life… the ethics, the transparency. We tell you the cost of everything we make and then what you're paying so you can see the mark–up and we tell you the stories of our factories, we want people to have a space where we can actually tell those stories in real life, not just online.

MICHAEL PREYSMAN, EVERLANE

DONATION PROGRAMS

Attention to social problems such as poverty is common throughout most DTCs. The majority have special donation programs as 'Buy 1 Give 1', or they donate returned products to those in need. Thanks to ONG partnerships these brands are truly helping communities.

STRONG VOICE AND CONCRETE ACTIONS

From body size acceptance to racial and LGBT integration, DTCs want to tackle social challenges, taking sides and promoting their values and beliefs through marketing campaigns and their activity on social media.

Content focus (Storytelling everything)

Imagining the future

Especially for DTC companies, media content is pivotal for customer engagement. Every moment, decision, service, and new feature represent an opportunity to create engagement, offering snackable content (through videos, images, blog articles etc.), in order to both entertain and build a strong relationship with the customer.

In a Direct to Consumer company, **marketing is not considered as a silo**, while it is equally distributed along the entire value chain. This allows the brand to communicate every stage of the product journey, engaging the customers with more transparency.

Content helps customers to easily understand what exactly the product offer is, what the company values are, how the brand is different from its competitors and how their life can improve thanks to the product/ service offered. To reach this goal DTCs adopt an efficient content curation consistently aligned with the branding strategy.

"We're working on being transparent and communicating everything to our customers. Videos, pictures, marketing campaigns on product production. When you are mainly online people get wary and suspicious. We need to build trust and to do so we need to be completely open to discussion on every single part of our value chain.

CARLO BATTAGLINO, LIRECENTO

"When you are born digital, you need to create a brand, with a clear set of values and positioning. We don't have a physical space to make people fall in love with us. We need to make them fall in love with our engaging digital contents.

STEFANO CAVALERI, FOORBAN

Direct to Consumer Revolution

A successful brand is one that clearly communicates what is known to be 'The three V's': Voice, Visuals, and Value.

VOICE

Brand voice consists of a brand core message and the tone it applies to its messages. It is crucial to choose what kind of tone and messages to use as they will convey the brand promise to the end user. A clear voice allows consumers to describe a brand in a few short words.

VISUALS

Visuals help customers to imagine the brand's world. It's essential to match imagery and message in order to reinforce both the brand promise and to influence a purchasing decision. DTC's strength lies in understanding that visuals matter the most for customer engagement.

VALUES

A service or product value is a brand's point of differentiation. Every aspect from manufacturing solutions to price and services offered are an expression of the values that the brand is sharing with his customers and the reason why they build a relationship with the brand.

Direct sell

Imagining the future

The whole DTC system rotates around the
direct selling to consumers whilst cutting out
the middlemen. By doing so, they are in charge
of the whole funnel, from discovery to loyalty, shaping
it along with their brand vision.
Being able to communicate with consumers
throughout the entire process gives the company
a meaningful advantage.

How to create innovative business models?

The freedom, derived from being direct
to consumer and cutting out retailer's mark–up, allows
companies to offer cheaper prices,
services and customer care.
However, each company chooses the business
model that best fits their needs. From freemium
to subscription and "razor & blades" business model,
DTCs use different kinds of innovative
and disruptive business models to encourage
the adoption and repurchase of the product.

"

The industry has historically focused on its most passionate and avid customers, who drive the majority of sales. Our customers were different, beauty was a part of their life, but not a passion… We saw untapped potential to change their relationship with the category.

KATIA BEAUCHAMP, BIRCHBOX

SUBSCRIPTION

Lola takes care of everything a woman needs to make deliberate decisions about her reproductive health. From the first period to the last, they've got everything covered.

SELF SERVICE

Tylko believes that every home should be filled with perfectly-fit, functional furniture that happens to look great and that people can build on their own.

RENT

Mobley is a designer-curated furniture collection that can be rented for a short term period. In line with the customer's needs.

UNIQUE FORMAT

Flamingo provides razors for women body care routines. Razors are almost for free and every month, through a subscription, customers can receive disposable blades.

BRAND CURATOR

Nordstrom has an incredible eye for what's next in fashion. They work to deliver the best possible shopping experience, helping their customers express their style—not just buy fashion.

CROSS SELLING

Winc is an easy and pleasurable way of experiencing and exploring good wine, coupled with superior food from selected partners if the customer feels like it.

CROWD SOURCING

The customers are **Threadless**. They make the ideas, they pick what is sold, without the powerful community that truly believes in the project it couldn't exist.

BOTTOM OF PYRAMID

Hubble is a new brand of contact lenses with the aim of offering its customers the high quality affordable lenses they deserve.

Physical experience

Assured that 90 cents of every retail dollar in the U.S. is spent at a physical location, DTCs see brick-and-mortar stores as a significant opportunity to overcome some of their customer journey flaws. The "clicks-to-bricks" phenomenon is all about marketing the brand and offering hands-on experiences with their products.
When partnering with third-party retailers, they are in control of external distribution, instead of being controlled by it and can sustain conversations with a higher bargaining power.

Imagining the future

UNCONVENTIONAL STORE

Rhea's Cafe in LA has been picked by Glossier to launch a month-long pop-up where food and beauty products coexist. In the store, it is possible to test and purchase Glossier products, while food is only available in limited time slots. Packaging used to serve the food has been designed exclusively for this collaboration.

LIVE FREE TRIAL

Casper realised that sleeping is the only authentic way to test mattresses before purchasing. In New York, they opened The Dreamery, the first nap showroom, where customers can actually sleep while testing Casper's mattresses.

"

The main reason a customer wouldn't buy our product online was because they wanted to be able to feel it themselves. We are remedying that with our physical location.

SCOTT TANNEN, BOLL & BRANCH

Direct to Consumer Revolution

How to enhance physical experience?

SERVICE BEFORE SELLING

Bonobos opened several stores labelled as a "guide shop", where each customer is followed by a personal guide that would illustrate their offer and take their measurements. Items can be tried on, but can't be bought in the store. They're only available for purchasing online.

LET THEM FEEL THE PRODUCT

In Warby Parker's stores, customers can finally get hands-on experience with real products rather than viewing them online. Clients are assisted by company expert sales assistants and they can enjoy a variety of eye-related services, such as optical prescriptions and so on.

Painpoint as starting point

Imagining the future

Starting with a strong R&D focused on the analysis on the customer journey of a specific socio-demographic target, allows DTCs to identify specific pain-points and moment of the journey that needs redesigning or new problems to be solved. DTCs are able to fill a gap in an established market by solving problems that traditional brands never took into consideration as relevant to their business.

Casper

Casper's focus on urban millennials led them to stress, study, analyse and solve delivery problems. Urban millennials don't have a car, they use public transportation, they are never at home, they barely have time to read instructions and set up the product. The unboxing experience is what makes it special. An automatic setup delivered in a small box at a previously set time frame.

"

The idea of our business was born during a lunch break when we noticed that the options available weren't up to the standards of other services. A product able to satisfy the needs of a young urban worker. Good, healthy but tasty food, delivered just in time. We want to be an alternative to the office canteen. We cook to deliver, and we designed everything for that specific moment. Production of food and supporting materials is designed with the aim of creating a pleasurable moment for our customers with specific needs and expectations.

STEFANO CAVALERI, FOORBAN

Tortuga

Tortuga's idea of serving remote workers, allowed them to design a product able to help them with the moving of many items, all with different sizes and peculiarities. A product that is efficient, easy to carry and looks professional.

Don't treat like a

me
silo

DTC brands don't consider value chain phases as independent and self–sustainable departments and activities. They are all part of the same integrated strategy, they influence and interact with each other. Marketing talks about inbound logistics, R&D develops new services, sales models influence production. This allows for a more coherent and cohesive approach where the goal is common for each activity.

Customers in the digital landscape

Customers are evolving too, they are switching to digital purchases more and more, because they can gain advantages and benefits. And DTCs are answering perfectly to these new needs and expectations that customers are craving to solve. Being native digital allows DTCs to fit in perfectly with the online context. Every feature, products, communication strategy, service they implement is due to the new digital demands from customers.

We have worked in partnership with **Mediacom** on this integrated project with the goal of understanding how customers behavior is changing online, which are the triggers that foster or increase an online purchase and why people are migrating to digital channels.

*Mediacom ecommerce survey, 2019

90%

Made online purchases
in the last 12 months*

73%
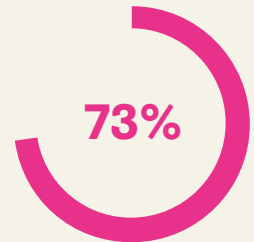
Go online to find what
they need at least monthly*

From online purchase behavior to DTCs purpose: the right answer to a specific need.

We highlighted 9 different purchase behaviors/personas that represent needs and expectations of people buying products online.

EMOTIONAL

STATUS
EXCLUSIVE
PRODUCT

First!

The Clever

PERSONAL
RELATIONSHIP

The Loyal

The Professional

The Lazy

SAVING

PROBLEM
SOLVING

Ain't
No Time

The Saver

MONEY
SAVING

No alternative

Infomaniac

PROVIDE
ALTERNATIVES
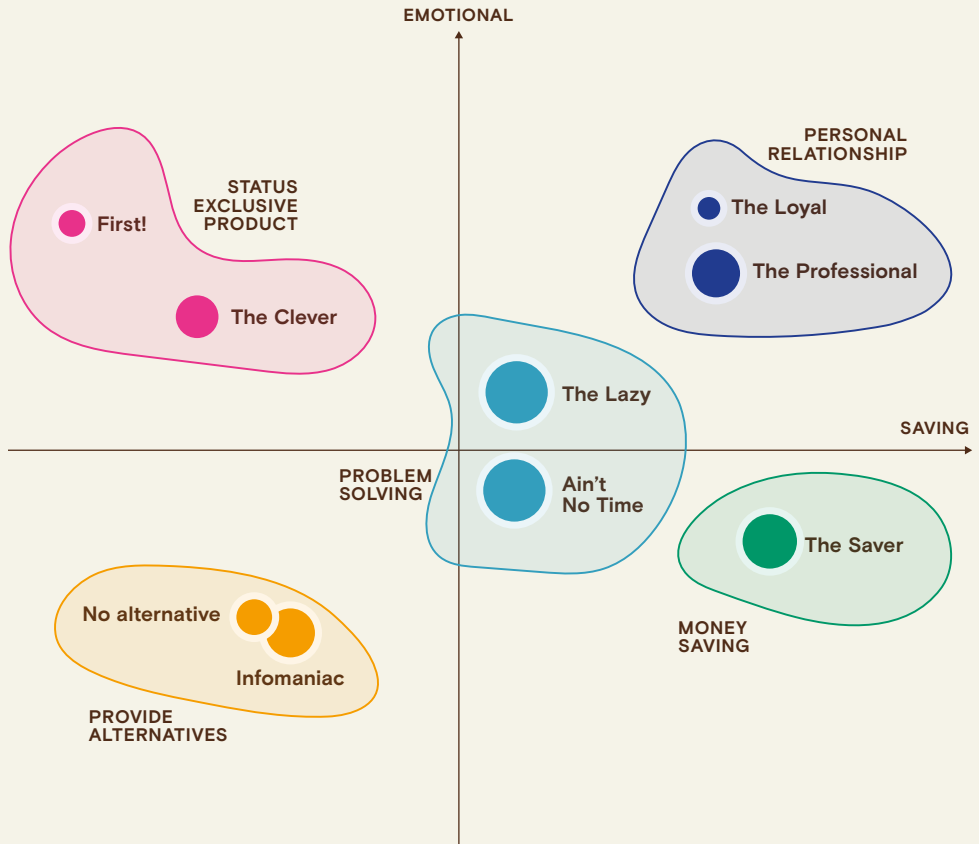
STATUS EXCLUSIVE PRODUCTS

First!
The clever

Customers that search for exclusivity, for well designed products that can amaze them, that want to be the first trying everything's new and that can represent a status symbol.

PERSONAL RELATIONSHIP

The loyal
The professional

Customers that search for a reference, for guidance, for someone to trust as true expert in the field. Someone to get in touch with on a daily base, to be directly in contact with. And to be reward with for their loyalty.

PURCHASE TRIGGERS FROM DTCs

DTCs offer basic products but highly designed, following trends and answering perfectly to what their consumer are on the lookout for. Products highly instagrammable and shareable on social network, that people what to show off.

DTCs are able to create a strong feeling of loyalty with their customers, thanks to their products, customer experience, strong brand presence and business model. They do everything perfectly, with all the details designed to make the customer fall in love with the product and the brand.

DTCs provide retention services and promotions for their clients to ensure they will stay with the brand as long as possibile.

#experienceconsistency
#contentfocus

#closerrelationship
#dataoriented

PROBLEM SOLVING

▎The lazy
▎Ain't no time

Customers in search for someone able to help them, a pain reliever that understands their needs and does everything to simplify and ease their life. That is present 24/7, that fits and adapts its service to the customers' routine.

DTCs provides unexceptionable customer experience, with services as same day delivery or customizable delivery schedule, an experience tailored on the customer needs, adaptable to his frenetic and ever-changing lifestyle.

DTCs are serving lazy customers at their best. They don't have to move a muscle. The brand is taking care of everything, leaving them to just enjoy the product, thanks to hassle free purchase and delivery experience.

#painpointstartingpoint
#focusedtarget

MONEY SAVING

▎The saver

Customers that wants to save money, they opt for an online purchase to solve a basic need, related to price. They want alternatives that don't sacrifice quality or design but that can allow them to save few coins.

DTCs are able to provide cost saving solutions thanks to the direct relationship they have with their customers: saving on the middleman costs they can offer higher quality at lower prices.

#directsell

PROVIDE ALTERNATIVES

▎No alternatives
▎Infomaniac

Customers that prefer physical strolling on the streets to online browsing. They choose to buy online because they aren't able to find the item they are searching for in their store. Basic products as essential alternative.

DTCs are transparent. They share everything with their customers that are hungry for knowledge. They want to know everything about the product, how it is produced, with which materials, how it is shipped, who is behind the curtains will make them comfortable in the purchase decision.

Offering a physical space where people can get in touch with the brand, touch and feel the product allows for higher trust and ease of channel switch.

#standforsomething
#simplifiedportfolio
#physicalexperience

Influence is a waterfall

According to our consumer segmentation the role of influencers open up to a new kind of comunications strategy.
All e-commercers are influencers.

72%
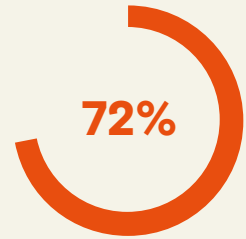
72% make online purchases also for parents and friends less experienced than them

— Influencers

Among the online personas, **First!**, **Infomaniac** and **The Clever** are those who share the highest gradient of influence towards their community and peers. 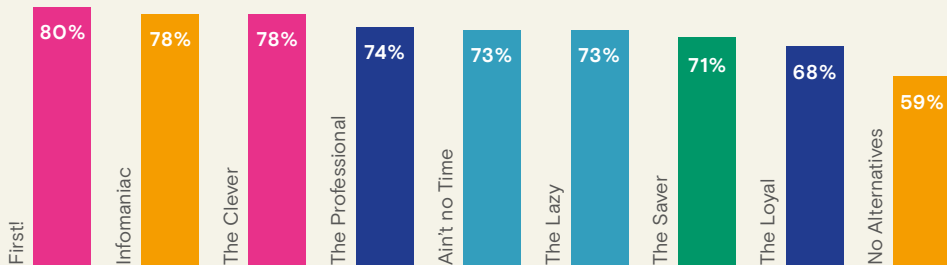It's a waterfall effect: online personas are able to influence a whole community around themselves. The hack is working on communities, in order to trigger buzz and turn different topics from unknown to familiar.

— If you know them you can speak to them

Online personas can be profiled through their online behaviour and technology comes in your help for consumer-oriented communication strategies. Purchase is an experience and experience is boosted by DTCs' consumer journey. But if we think experience as a cycle that links together all the parts of the funnel, we find that conversation is the core of this cycle that binds all together. DTCs as native digital are a perfect march to build conversation with their customers and have the opportunity to even narrow their communication leveraging on differtent objectives.

Gradient of influence towards their own community and peers.

First!	Infomaniac	The Clever	The Professional	Ain't no Time	The Lazy	The Saver	The Loyal	No Alternatives
80%	78%	78%	74%	73%	73%	71%	68%	59%

200 and more DTCs

PERSONAL CARE/BEAUTY

Beauty Counter Make up
2011 — beautycounter.com
Birchbox Make up
2010 — birchbox.com
Boxycharm Make up
2013 — boxycharm.com
Curology Make up
2014 — curology.com
Facetory Make up
2016 — facetory.com
Glossier Make up
2014 — glossier.com
Fatco Make up
2014 — fatco.com
Glossybox Make up
2011 — glossybox.de
Green Gorilla Make up
2016 — ilovegreengorilla.com
Hej Make up
2014 — hejorganic.com
Hush Make up
2016 — shophush.com
Julep Make up
2006 — julep.com
Labotè Make up
2015 — labote.com
Memebox Make up
2014 — us.memebox.com
Morning glory Make up
2012 — morninglory.com
Oars + Alps Make up
2016 — oarsandalps.com
Oh my cream Make up
2012 — ohmycream.com
REN Make up
2000 — renskincare.com
Rodan + Fields Make up
2002 — rodanandfields.com
Teadora Make up
2015 — teadorabeauty.com
Walker & Company Make up
2013 — walkerandcompany.com
Pinrose Parfumes
2013 — pinrose.com
Unique Parfumes
2014 — uniquefragrance.com
4 moms Baby Care
2005 — 4moms.com
Bluum Baby Care
2011 — bluum.com
Bonavi Baby Care
2016 — bonavi.de
Hugsy Baby Care
2017 — hugsycomfort.com
Nanit Baby Care
2015 — nanit.com
Owlet Baby Care
2012 — owletbabycare.co.uk
The Honest Company Baby Care
2012 — honest.com

Buck Brush Dental Care
2015 — buckbrushco.com
Goby Dental Care
2016 — goby.co
Happy brush Dental Care
2016 — happybrush.de
Revitin Dental Care
2012 — revitin.com
Callaly Personal Care
2015 — calla.ly/gb/home
Einhorn Personal Care
2014 — einhorn.my
Lola Personal Care
2015 — mylola.com
Thinx Personal Care
2013 — shethinx.com
Unbound Personal Care
2013 — unboundbabes.com
Esalon Hair
2010 — esalon.eu.com
Fabfitfun Hair
2010 — fabfitfun.com/welcome
Function of beauty Hair
2015 — functionofbeauty.com
Madison Reed Hair
2013 — madison-reed.com
Capsule Pharmacy
2016 — capsulecares.com
Hubble Contacts Pharmacy
2016 — hubblecontacts.com
Peloton Workout
2012 — onepeloton.com
Beardbrand Men Beauty
2012 — beardbrand.com
Dollar Shave Club Men Beauty
2012 — dollarshaveclub.com
Harry's Men Beauty
2013 — harrys.com/en/gb
Horace Men Beauty
2015 — horace.co/fr

TRAVEL

Faraday Future Auto
2014 — ff.com
Lucid Motors Auto
2007 — lucidmotors.com
Tesla Auto
2003 — tesla.com
Brilliant Bicycle
2014 — brilliant.co
Sole Bicycles Bicycle
2009 — solebicycles.com
Away Luggage
2015 — awaytravel.com
Horizn Luggage
2015 — horizn-studios.com
Paravel Luggage
2016 — tourparavel.com

Tortuga Luggage
2010 — tortugabackpacks.com
Cabeau Trip
2009 — cabeau.com
Cairn Trip
2013 — getcairn.com

PET

Barkbox Toys
2011 — barkbox.com
Butternut box Food
2016 — butternutbox.com
Ollie Food
2016 — myollie.com
Tails Food
2015 — tails.com/gb

FOOD/VITAMINS

Blue Apron Food Box
2012 — blueapron.com
Daily Harvest Food box
2015 — daily-harvest.com
Freshly Food box
2013 — freshly.com
Gobble Food Box
2014 — gobble.com
Graze Food Box
2008 — graze.com
Hello Fresh Food box
2011 — hellofresh.com
Home Chef Food box
2013 — homechef.com
Hungry Harvest Food box
2014 — hungryharvest.net
Kettlebell Kitchen Food box
2012 — kettlebellkitchen.com
Love with food Food Box
2012 — lovewithfood.com
Naturebox Food box
2012 — naturebox.com
Plated Food box
2012 — plated.com
Pre Brands Food box
2007 — eatpre.com
Sun Basket Food box
2014 — sunbasket.com
Urthbox Food box
2013 — urthbox.com
Dirty Lemon Drinks
2015 — dirtylemon.com
Health Ade Drinks
2012 — health-ade.com
Hint Drinks
2005 — drinkhint.com
Mana Drinks
2014 — drink-mana.com
Soylent Drinks
2013 — soylent.com

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Imagining the future

Bocandy Sweets
2014 — bocandy.com
Candy Club Sweets
2014 — candyclub.com
Bean Box Coffee
2014 — beanbox.com
Sudden Coffee Coffee
2015 — suddencoffee.com
Aloha Chocolate
2014 — aloha.com
Halo Top Ice cream
2012 — halotop.com
Califia Farms Milk
2011 — califiafarms.com
Desert Farms Milk
2014 — desertfarms.com
Ripple Milk
2015 — ripplefoods.com
Bright Cellars Alcohol
2014 — brightcellars.com
Winc Alcohol
2011 — winc.com
Flaviar Alcohol
2012 — flaviar.com
Food52 Tools
2009 — food52.com
Hungry Root Healthy
2015 — hungryroot.com
Noom Healthy
2008 — noom.com
Teatox Healthy
2013 — teatoxshop.com
Your superfood Healthy
2014 — yoursuperfoods.de
Yumi Healthy
2017 — helloyumi.com
Bulletproof Supplements
2013 — bulletproof.com
Bulu Box Supplements
2012 — bulubox.com
Care/of Supplements
2016 — takecareof.com
Core Supplements
2013 — hydratewithcore.com
Elysium Supplements
2015 — elysiumhealth.com
HVMN Supplements
2017 — hvmn.com
Nootrobox Supplements
2017 — hvmn.com/nootrobox
Ora Organic Supplements
2014 — ora.organic
Ritual Supplements
2015 — ritual.com
Take daily Supplements
2016 — takedaily.dk
Trubrain Supplements
2019 — trubrain.com

Armedangels Clothing
2007 — armedangels.de
Allison Mitchell Clothing
2017 — allisonmitchell.com
Allume Clothing
2017 — allume.co
American Giant Clothing
2011 — american-giant.com
Ashley Stewart Clothing
1991 — ashleystewart.com
AYR Clothing
2014 — ayr.com
Betabrand Clothing
2010 — betabrand.com
Bombfell Clothing
2011 — bombfell.com
Bonobos Clothing
2007 — bonobos.com
Buck Mason Clothing
2013 — buckmason.com
Clique Brands Clothing
2016 — cliquebrands.com
Cuyana Clothing
2013 — cuyana.com
Dia & Co Clothing
2014 — dia.com
Dôen Clothing
2015 — shopdoen.com
Dolls Kill Clothing
2010 — dollskill.com
DSTLD Clothing
2013 — dstld.com
Eloquii Clothing
2014 — eloquii.com
Everlane Clothing
2011 — everlane.com
Fame & Partners Clothing
2013 — fameandpartners.com
Farfetch Clothing
2008 — farfetch.com/it
Five Four Group Clothing
2017 — fivefourgroup.com
For Love and Lemons Clothing
2009 — forloveandlemons.com
Frank and Oak Clothing
2012 — frankandoak.com
Grana Clothing
2013 — grana.com
Gwynnie Bee Clothing
2011 — closet.gwynniebee.com
Huckberry Clothing
2010 — huckberry.com
Jack Threads Clothing
2008 — jackthreads.com
Le Tote Clothing
2012 — letote.com
Lolly Wolly Doodle Clothing
2009 — lollywollydoodle.com

MM. La Fleur Clothing
2011 — mmlafleur.com
Ministry of Supply Clothing
2011 — ministryofsupply.com
Mott and Bow Clothing
2013 — mottandbow.com
Nasty Gal Clothing
2006 — nastygal.com
Polene Clothing
2016 — polene-paris.com
Reformation Clothing
2009 — thereformation.com
Revolve Clothing
2009 — revolve.com
Son of a tailor Clothing
2014 — sonofatailor.com
Stitch Fix Clothing
2011 — stitchfix.com
Tamara Mellon Clothing
2009 — tamaramellon.com
Thesis Couture Clothing
2014 — siscouture.com
Universal standard Clothing
2015 — universalstandard.com
Wantable Clothing
2012 — wantable.com
Wool & the gang Clothing
2008 — woolandthegang.com
Worst behavior Clothing
2014 — worst-behavior.com
Baublebar Accessories
2010 — baublebar.com
Bespoke Post Accessories
2011 — bespokepost.com
Dagne Dover Accessories
2012 — dagnedover.com
D. Wellington Accessories
2011 — danielwellington.com
E. Alexander Accessories
2009 — ernestalexander.com
Hudson Sutler Accessories
2011 — hudsonsutler.com
Kronaby Accessories
2016 — kronaby.com
Linjer Accessories
2014 — linjer.co
Mejuri Accessories
2013 — mejuri.com
MVMT Watches Accessories
2013 — mvmtwatches.com
Rocksbox Accessories
2012 — rocksbox.com
Sole Society Accessories
2011 — solesociety.com
True Facet Accessories
2014 — truefacet.com
WP Standard Accessories
2008 – wpstandard.com

Aeyde Shoes
2015 — aeyde.com

Allbirds Shoes
2015 — allbirds.com

Arkk Shoes
2017 — arkkcopenhagen.com

Atoms Shoes
2018 — wearatoms.com

Bucketfeet Shoes
2011 — bucketfeet.com

Greats Shoes
2013 — greats.com

Jack Erwin Shoes
2013 — jackerwin.com

Koio Shoes
2014 — koio.co

M. Gemi Shoes
2015 — mgemi.com

Olukai Shoes
2005 — olukai.com

Paul Evans Shoes
2013 — paulevansny.com

Plae Shoes
2012 — plae.co

Rothy's Shoes
2015 — rothys.com

Scarosso Shoes
2010 — scarosso.com/it

Vivobarefoot Shoes
2003 — vivobarefoot.com

Yellowberry Shoes
2013 — yellowberrycompany.com

Bombas Socks
2013 — bombas.com

Foot Cardigan Socks
2012 — footcardigan.com

Happy socks Socks
2008 — happysocks.in

Mahabis Socks
2014 — mahabis.com

Stance Socks Socks
2010 — euro.stance.eu.com

Adore me Underwear
2011 — adoreme.com

Harper Wilde Underwear
2017 — harperwilde.com

Juliannna Rae Underwear
2006 — juliannarae.com

Lively Underwear
2015 — wearlively.com

Mack Weldon Underwear
2011 — mackweldon.com

Meundies Underwear
2011 — meundies.com

Third Love Underwear
2013 — thirdlove.com

Tomboy X Underwear
2012 — tomboyx.com

True&Co. Underwear
2011 — trueandco.com

Carbon38 Technical
2012 — carbon38.com

Chubbies Technical
2011 — chubbiesshorts.com

Cotopaxi Technical
2014 — cotopaxi.com

Ellie Technical
2013 — ellie.com

Fabletics Technical
2013 — fabletics.com

Kuiu Technical
2010 — kuiu.com

Outdoor voices Technical
2014 — outdoorvoices.com

Pact Technical
2009 — wearpact.com

Tracksmith Technical
2014 — tracksmith.com

Monica+Andy Kids
2012 — monicaandandy.com

Primary Kids
2014 — primary.com

Rockets of Awesome Kids
2015 — rocketsofawesome.com

Tea collection Kids
2002 — teacollection.co

Ace&Tate Eyewear
2013 — aceandtate.com

Roka Eyewear
2011 — eu.roka.com

Warby Parker Eyewear
2010 — warbyparker.com

Comb. Gentlemen Men style
2011 — combatgent.com

Indochino Men style
2007 — indochino.com

J. Hilburn Men style
2007 — jhilburn.com

Knot Standard Men style
2010 — knotstandard.com

Ledbury Men style
2009 — ledbury.com

Mizzen+Main Men style
2012 — mizzenandmain.com

Proper Cloth Men style
2008 — propercloth.com

Ratio Clothing Men style
2010 — ratioclothing.com

Spoke Men style
2013 — spoke-london.com

The Black Tux Men Style
2012 — theblacktux.com

Thread Men Style
2009 — thread.com

UNTUCKit Men Style
2011 — untuckit.com

Boll & Branch Beds
2014 — bollandbranch.com

Brooklinen Beds
2014 — brooklinen.com

Casper Beds
2014 — casper.com

Dormify Beds
2009 — dormify.co

Eve Beds
2015 — evesleep.co.uk

Floyd Beds
2014 — floydhome.com

Helix Beds
2014 — helixsleep.com

Keetsa Beds
2007 — keetsa.com

Leesa Beds
2014 — leesa.com

Muun Beds
2014 — muun.co

Parachute Beds
2013 — parachutehome.com

Saatva Beds
2010 — saatvamattress.com

Simba Beds
2015 — simbasleep.com

Tuft & Needle Beds
2012 — tuftandneedle.com

Burrow Furniture
2016 — burrow.com

Chairish Furniture
2013 — chairish.com

Interior Define Furniture
2014 — interiordefine.com

Joybird Furniture
2014 — joybird.com

Swoon Furniture
2012 — swooneditions.com

Touch of Modern Furniture
2012 — touchofmodern.com

Tylco Furniture
2014 — tylko.com

Brandless Home
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EBTH Home
2006 — ebth.com

Groove Home
2012 — grove.co

Snowe Home
2015 — snowehome.com

Urbanara Home
2010 — urbanara.com

Framebridge Decorations
2014 — framebridge.com

Simply Framed Decorations
2014 — simplyframed.com

Spoonflower Decorations
2008 — spoonflower.com

Direct to Consumer Revolution

Innovating today doesn't just mean focusing on the product. Above all in established markets, where disruptive technologies – or "new iPhone" products – revolutionise and disrupt competitive scenarios once every hundred years.
As Direct to Consumer brands show us, **it's not the "what"** that can make the difference, but the **"how"**: brands that focus on established markets are increasingly called to change their approach to remain relevant and to face new players. They need to develop a new mindset to design the brand experience in an organic and consistent way on every touchpoint and to innovate through new business and service models, always keeping the consumer's point of view in mind (through data) and acting, at any point in the value chain, in an "informed" way regarding their needs and wishes.

DTCs brands bring new perspectives and tools to face consolidated challenges, embracing values and a clear ethical position, strengthened by a renewed relationship with customers, telling a coherent, transparent and meaningful story.

IMG- is a project by cba