

The 2nd Annual

eTail D2C Trends Report

How Retailers' D2C
Strategies Are Expanding
and Evolving



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Executive Summary

Once the purview of startups and disruptor brands, direct-to-consumer (D2C) sales is now an integral part of many manufacturers' sales strategies. In WBR Insights' previous report on the subject, we learned that most manufacturers now make a significant portion of their revenue from D2C sales rather than sales through retail stores. They are also leveraging third-party marketplaces to reach new segments across the world.

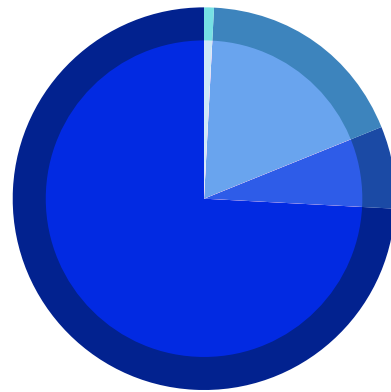
We also learned that the D2C business is not without its challenges. Companies relying on internal D2C capabilities aren't always as cost-effective in their operations as others. Last year, some brands also claimed to require a major technology overhaul if they wanted to secure their D2C strategies for the future.

This report explores the progress brands have made in their D2C strategies over the past year. It contains insights from D2C leaders as well as benchmarking information regarding technology adoption, strategy deployment, and industry trends.

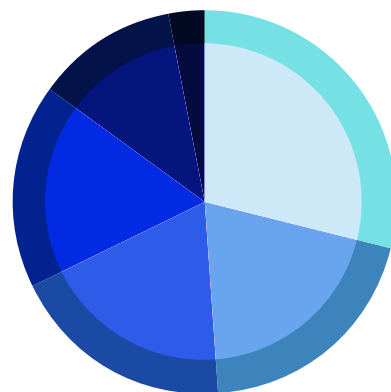
About the Respondents

The WBR Insights research team surveyed **100 D2C** and **digital commerce leaders** from across the U.S. and Canada to generate the results featured in this report. All the respondents represent brand manufacturers that sell their products online.

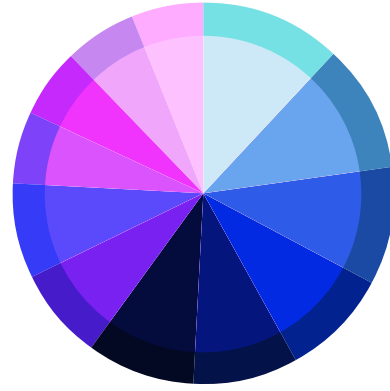
What is your seniority?



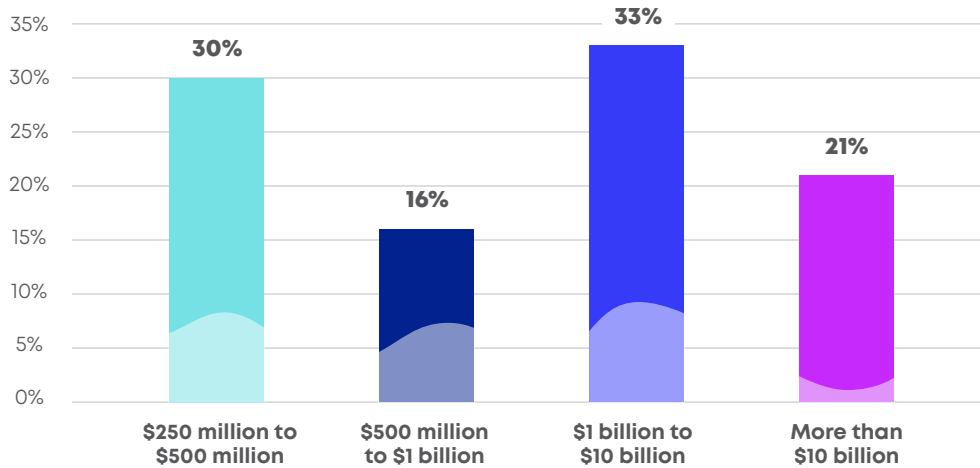
What is your role?



What is the primary product category that you sell via D2C channels?



What is your company's annual revenue?





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Key Insights

Among the respondents:

- 56% earn **26% to 50% of their revenue** from D2C sales.
- 80% experienced an **increase in D2C sales revenue of 26% to 50%** compared to the previous year.
- **40% plan to increase their D2C sales** over the next 12 months.
- 45% will **use data-driven product development** and 40% will use **social media content and influence marketing** to drive their D2C business over the next 12 months.
- 46% say a **lack of data insights** and 43% say the **high costs of customer acquisition** are among their top D2C challenges.
- In each case, most consider their customer data platform (60%) and their CRM (52%) critical in terms of their existing contributions to their D2C success.
- The **two biggest roadblocks to increasing digital commerce profitability** are channel management and retail relationships (38%) as well as digital advertising and acquisition costs (37%).
- **53% claim social commerce is lacking** in their existing digital commerce platform.
- 45% consider buy online, pick up in-store, or “BOPIS,” capabilities lacking in their existing digital commerce platform.
- 27% consider WISMO (“Where is my order?”) inquiries their **biggest pain point** when it comes to serving D2C shoppers.
- 32% consider **personalized post-purchase marketing** the **most important element** of the post-purchase experience.
- **66% will use either linear or streaming TV advertising** to drive their D2C business in the next 12 months. Among this group, 50% consider increasing conversion rates a primary reason for doing so while 41% consider the rising acquisition costs on digital and social channels a primary reason.
- **33% offer a subscription** service or product.
- 36% expect their D2C strategy will expand somewhat (4%) or substantially (32%) over the next three years.

D2C Sales Continue to Grow

Not long ago, the direct-to-consumer market was saturated with small startups and specialty products consumers couldn't find on store shelves. Recently, more and more major manufacturers are looking to establish themselves in this lucrative market. D2C sales continue to grow as a means for brand manufacturers to reach new segments and improve their market share.

Being successful in D2C sales can be a challenge, however. Manufacturers need a solid technology infrastructure to sell their products online, and they need a resilient supply chain to support the fulfillment of the products they sell.

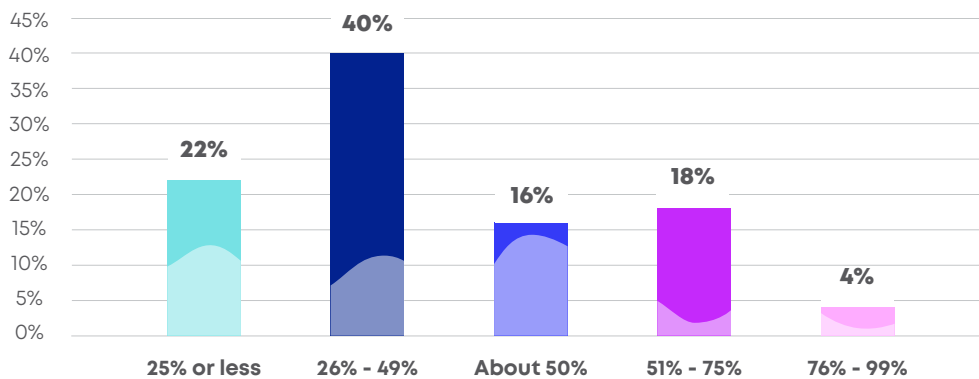
Furthermore, brand manufacturers must invest in advertising and marketing campaigns to support their D2C strategies. They can't rely on retailers to provide them with promotional benefits or prime real estate for their products in physical stores.

As we will learn, these challenges aren't stopping many brand manufacturers from entering the D2C space and expanding their operations. They've also leveraged significant technology and marketing investments to reach their customers.

D2C Revenue Growth

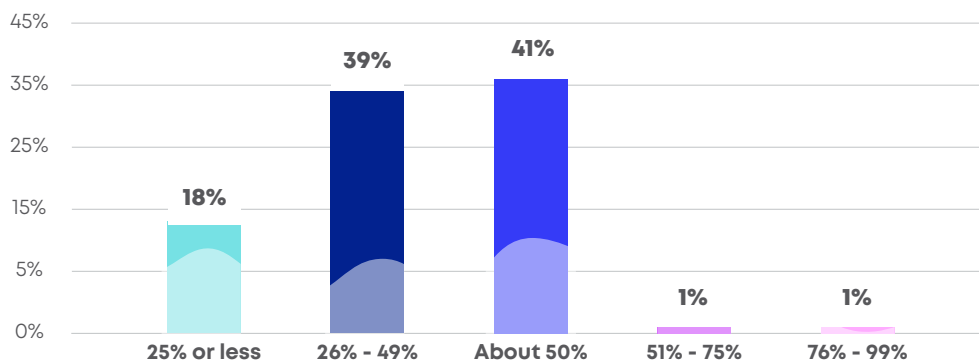
D2C sales can supplement a brand manufacturer's primary revenue stream, but it can also become their primary revenue stream. In many cases, D2C sales can be the primary driver of an organization's revenue growth.

What percentage of your company's revenue comes from sales you make directly to consumers?



Most of the respondents make at least 26% of their total revenue from D2C sales. However, it is likely not the primary revenue source for a majority of the organizations surveyed. Only 22% of the respondents say they make more than 50% of their revenue through D2C sales.

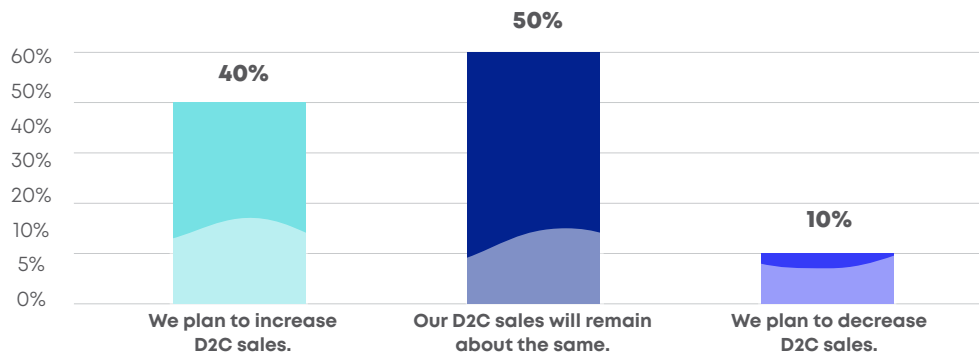
By what percentage (\$ YoY) did your D2C sales revenue grow for your company in the last year?



This could change. The respondents indicate that they are experiencing solid revenue growth from their D2C sales year over year.

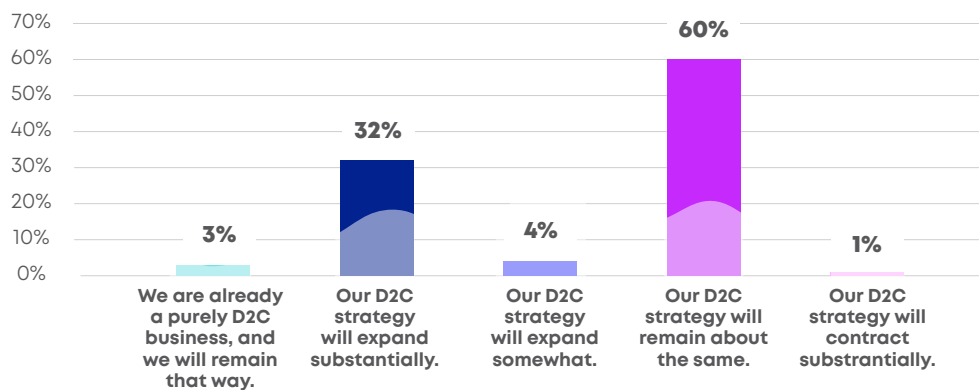
Specifically, 82% of the respondents say they've experienced at least 26% revenue growth from their D2C sales channel compared to the previous year. This includes 41% of the respondents who say they've experienced about a 50% increase in D2C revenue.

Does your company plan to increase or decrease its D2C sales over the next 12 months?



A significant portion of the respondents (40%) also plan to increase their D2C sales in the next 12 months. Although 50% of the respondents say their D2C sales will remain about the same, this increase represents a significant shift toward the D2C market among brand manufacturers.

Do you expect your D2C strategy to expand or contract over the next three years?



Furthermore, over one-third of the respondents (36%) expect their D2C strategies to expand over the next three years. Another 60% expect their strategies to remain the same.

Among these respondents, many say increasing competition and demand for omnichannel solutions are pushing them toward expansion.

"The developments in the market, disruptions from other brands, and the need to create a strong omnichannel environment are all part of this development," says a marketing director at a health and beauty brand.

"Market share matters to us," says a D2C director from a sporting goods brand. "To maintain our market share, we will continue growing in the D2C space."

D2C Strategies and Technologies

Product development and marketing are often key drivers of a brand manufacturer's D2C growth. However, recent investments in new technologies—including marketing technologies—have also been drivers at many companies.

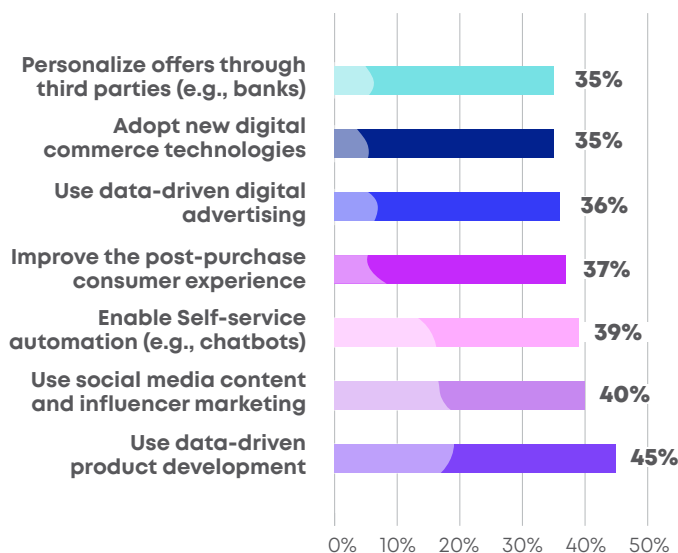
Brand manufacturers have had time to perfect their D2C strategies to better serve customers.

What strategies will you use to drive your D2C business in the next 12 months?

For example, 45% of the organizations surveyed plan to use data-driven product development to drive their D2C business in the next 12 months. This process involves using real-world data, including proprietary data and big data, to make key decisions about the types of products the company will bring to market. It's an advancement of traditional product development, which can involve speculation.

Significant portions of the respondents also plan to leverage digital in the form of social media content and influencer marketing (40%), self-service automation (39%), and improving the post-purchase consumer experience (37%).

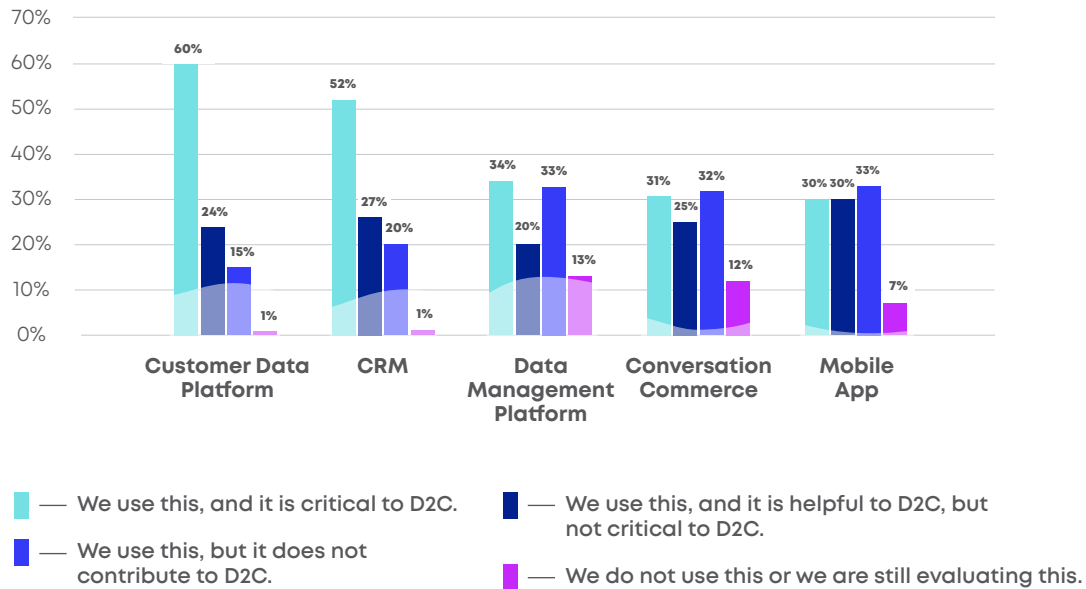
As we will learn, the post-purchase experience is an area where brand manufacturers can stand out



in the D2C market. With the right investments and strategies, they could outshine some of the most established retailers when it comes to consumer returns, troubleshooting, and service.

Significantly, 36% of the respondents also say data-driven digital advertising will drive their business in the next 12 months. Targeted and personalized ads are often central to driving D2C customer acquisition.

Please rate the following technologies or strategies in terms of their existing contributions to your D2C success.



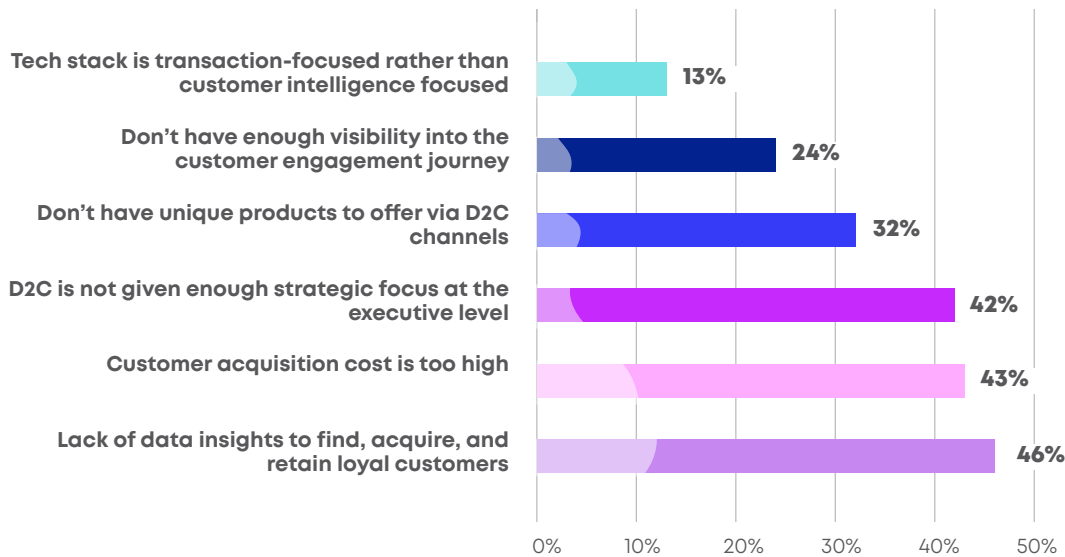
Most of the respondents (60%) say their customer data platforms (CDPs) are “critical” to their D2C business. A majority of the respondents (52%) also say their CRM systems are “critical.”

These answers align with previous responses. Data operations are becoming an important asset for D2C programs, as it enables brand

manufacturers to gain direct insights into their customers without having to rely on information shared by retailers.

Most of the respondents also consider data management platforms, conversation commerce, and mobile apps at least “helpful” to D2C success.

What do you consider your company's top-two challenges to achieving D2C success?



Despite these advances, brand manufacturers still face some significant challenges to their D2C programs.

Almost half of the respondents (46%) say they struggle with a lack of data insights to acquire and retain loyal customers as a top challenge. This implies that these organizations have made strides with their data operations, but they still need to make improvements. Improving data insights may require investments in new technologies, including those that can help leaders and executives draw insights from data more effectively.

Significant numbers of the respondents also say high customer acquisition costs (CACs) (43%) and a lack of strategic focus on D2C at the executive level (42%) are some of their top challenges. Sales and marketing leaders may need to use data to convince executives of the benefits of D2C expansion. This could help them secure the resources they need to invest in new data technologies, thereby improving their targeting.

The Two Returns Methods Every D2C Retailer Needs

The general sentiment in retail is that returns are hard—that they cut into available inventory, harm profitability, and complicate logistical operations (especially in ecommerce).

Yet as consumers do more shopping online and less in-store, their expectations around the returns experience continue to grow.

Nowhere is this sentiment more prevalent than in D2C.

Consumers want to control when, where, and how they return merchandise. They want returns policies and processes that are easy to understand and even easier to put into action. The trouble is, marrying convenience and affordability is complicated—offerings such as “free returns” and “pre-printed labels” hammer margins at scale.

Fortunately, this complexity is solvable (if it wasn’t companies such as [Stitch Fix](#), [Rent the Runway](#), and [Warby Parker](#) wouldn’t exist).



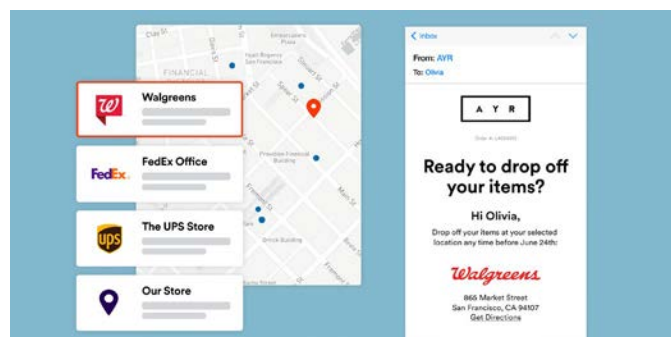
DID YOU KNOW?

More than 60% of online shoppers tie their buying decisions to a retailer’s return policies. This is why you see “free shipping, free returns” on so many homepages—simple, seamless policies win the sale almost every time.



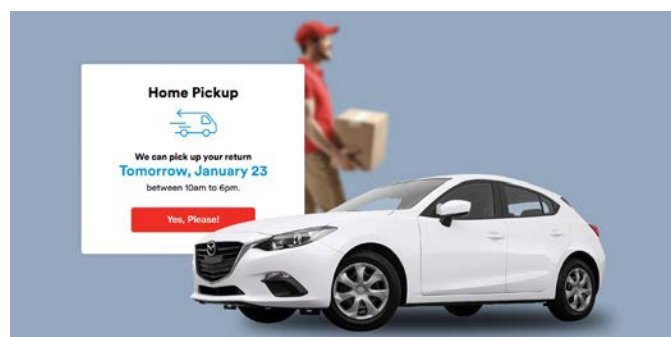
Amit Sharma is the founder and CEO of Narvar, which pioneered how brands engage with consumers beyond the “buy” button. Today, Narvar’s comprehensive Post-Purchase Platform empowers 1200+ of the world’s most-admired brands. Previously, he spent decades shaping retail operations as an executive at companies like Apple & Walmart.

From our vantage point, there are two returns methods every D2C retailer needs to invest in.



Method 1 - Drop-off

Customers must be able to return your products by way of a nearby drop-off location (e.g., a Walgreens, a UPS store, etc.) and a scannable QR code (i.e. labelless) for the carrier, be it UPS, FedEx, DHL, USPS, or someone else.



Method 2 - Home Pickup

A courier collects the item to be returned from the customer’s home or office at a scheduled time.

Of course, cost is a massive consideration when it comes to these return methods, but for D2C retailers don’t need to foot the bill.

In a world where consumers are willing to spend \$8 to get a \$6 burrito delivered to their door, asking customers to pick up the tab for returns isn’t outrageous, IF you’re offering a premium return experience—one that is truly seamless and convenient.

As the CEO of a business that strives to help D2C retailers streamline the returns experience for consumers, I’d love to hear about the challenges you’re facing with the reverse logistics journey. Please reach out to me with your thoughts, pain-points, questions, and comments at amit.sharma@reply.narvar.com.

Brand Manufacturers Face Challenges in Their D2C Strategies

D2C sales are a core part of brand manufacturers' digital commerce operations. They often rely on the same types of digital advertising, eCommerce, and channel management functions that are prevalent throughout other areas of the business, including direct retail sales.

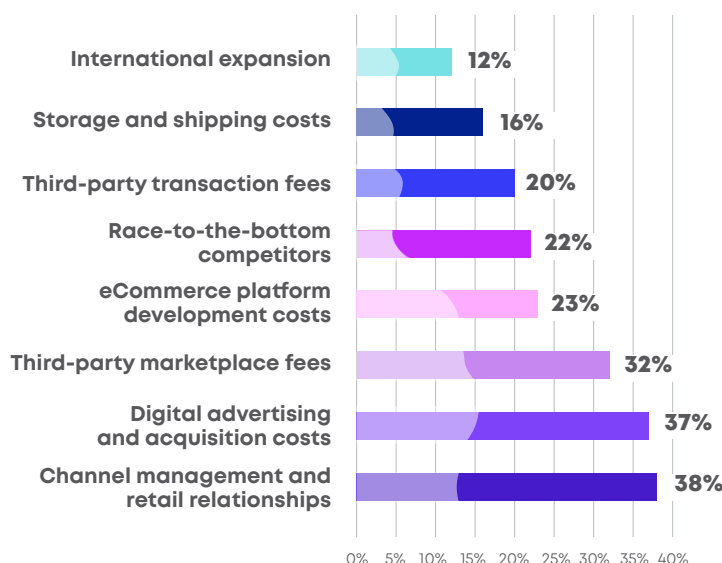
As such, D2C operations are often subject to the same challenges as other digital commerce operations.

Broadly speaking, what are the two biggest roadblocks to increasing the profitability of your digital commerce operation?

Currently, the two most significant roadblocks to the respondent's digital commerce operations are channel management and retail relationships (38%) as well as digital advertising and acquisition costs (37%).

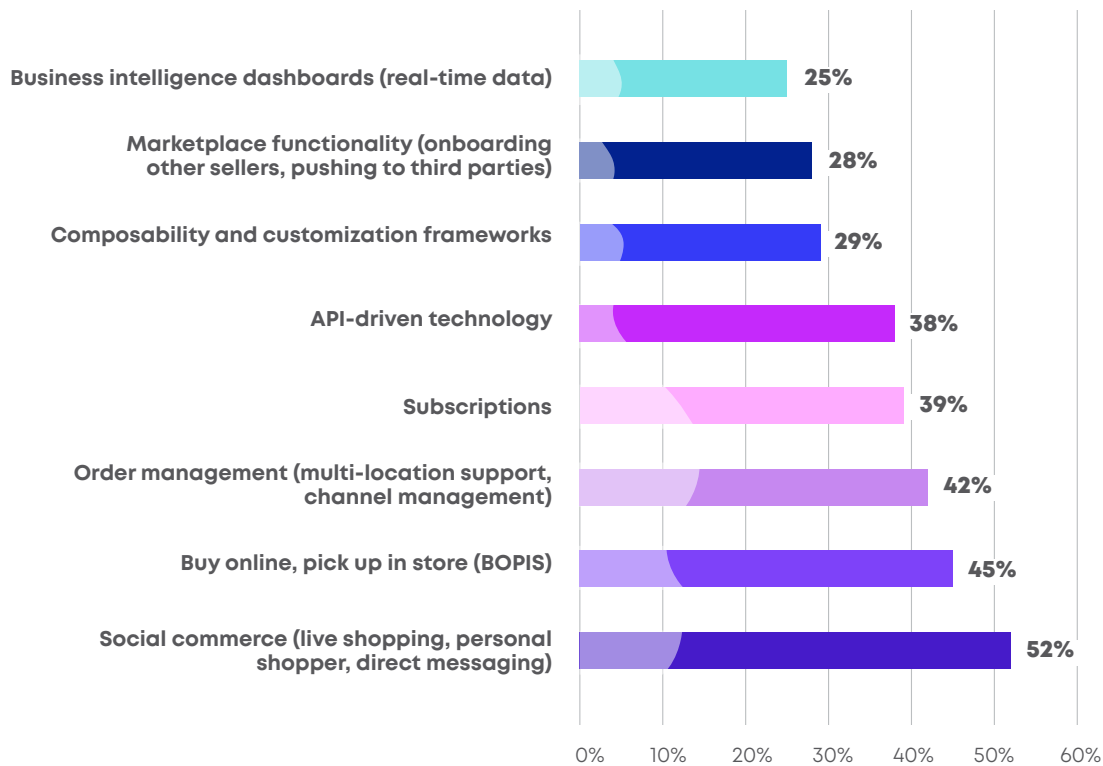
D2C brands must control their brand message and the customer experience, but they also need to reach customers where they are shopping. Reaching out directly to consumers can put a strain on brands' relationships with retailers, as retailers may view it as a strategy that undercuts their business.

Nonetheless, maintaining strong relationships with retailers and their sales channels is often important for reaching a larger customer base. Forming partnerships with third-party organizations can also improve digital advertising results and reduce acquisition costs, as it allows the brand manufacturers to tap into outside expertise.



Almost one-third of the respondents, (32%) say third-party marketplace fees are a challenge. Some manufacturers overcome this challenge by establishing independent marketplaces, but this can also limit their reach. Many organizations operating in this space rely on third-party marketplaces, so they must identify ways to reduce those fees through strategic partnerships and cost-reducing procurement strategies.

Which features are lacking in your existing digital commerce platform?

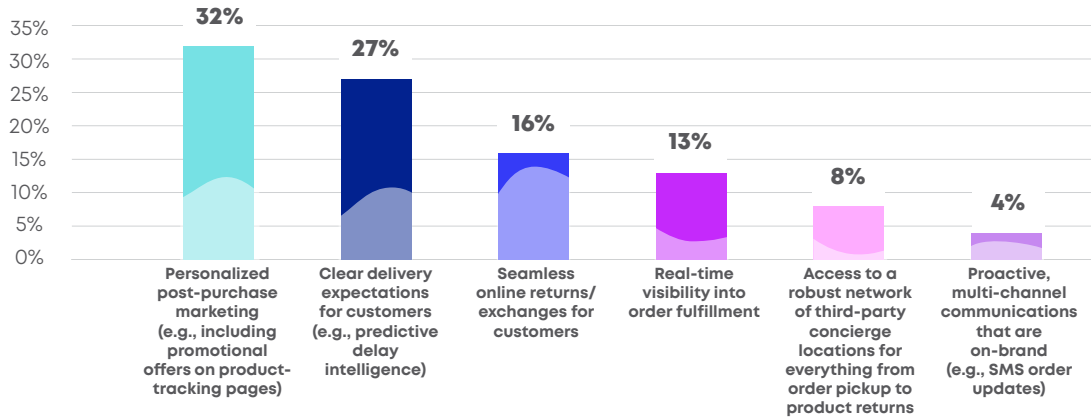


Most brand manufacturers are leveraging some type of digital commerce platform as part of their D2C efforts, but a significant number of the respondents to the survey say their current platforms are lacking in specific capabilities.

Most of the respondents (52%) say they lack social commerce capabilities. They need more ways to engage customers via live shopper experiences and direct messaging.

Almost half of the respondents also need their digital commerce platforms to provide them with better fulfillment, order management, and post-purchase capabilities. Forty-five percent say their platforms lack buy online, pick up in-store (BOPIS) capabilities and 42% say their platforms lack order management capabilities. This includes multi-location support and channel management tools.

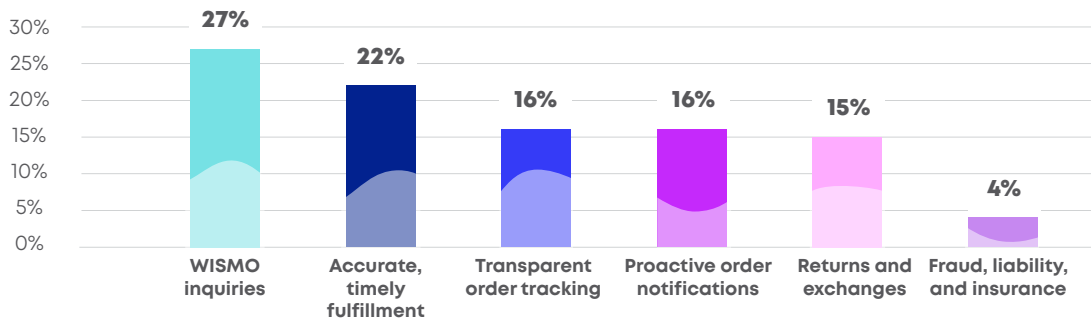
What is the most important element of the D2C post-purchase experience to your company?



Exploring this topic further, there are specific elements of the post-purchase experience that the respondents prioritize. Almost one-third (32%) say personalized post-purchase marketing is the most important element in the post-purchase experience, and they need a platform that supports it.

Twenty-seven percent say delivering clear delivery expectations for their customers is the most important element. This aligns with previous responses, which indicated that the respondents' platforms were lacking fulfillment and order management capabilities.

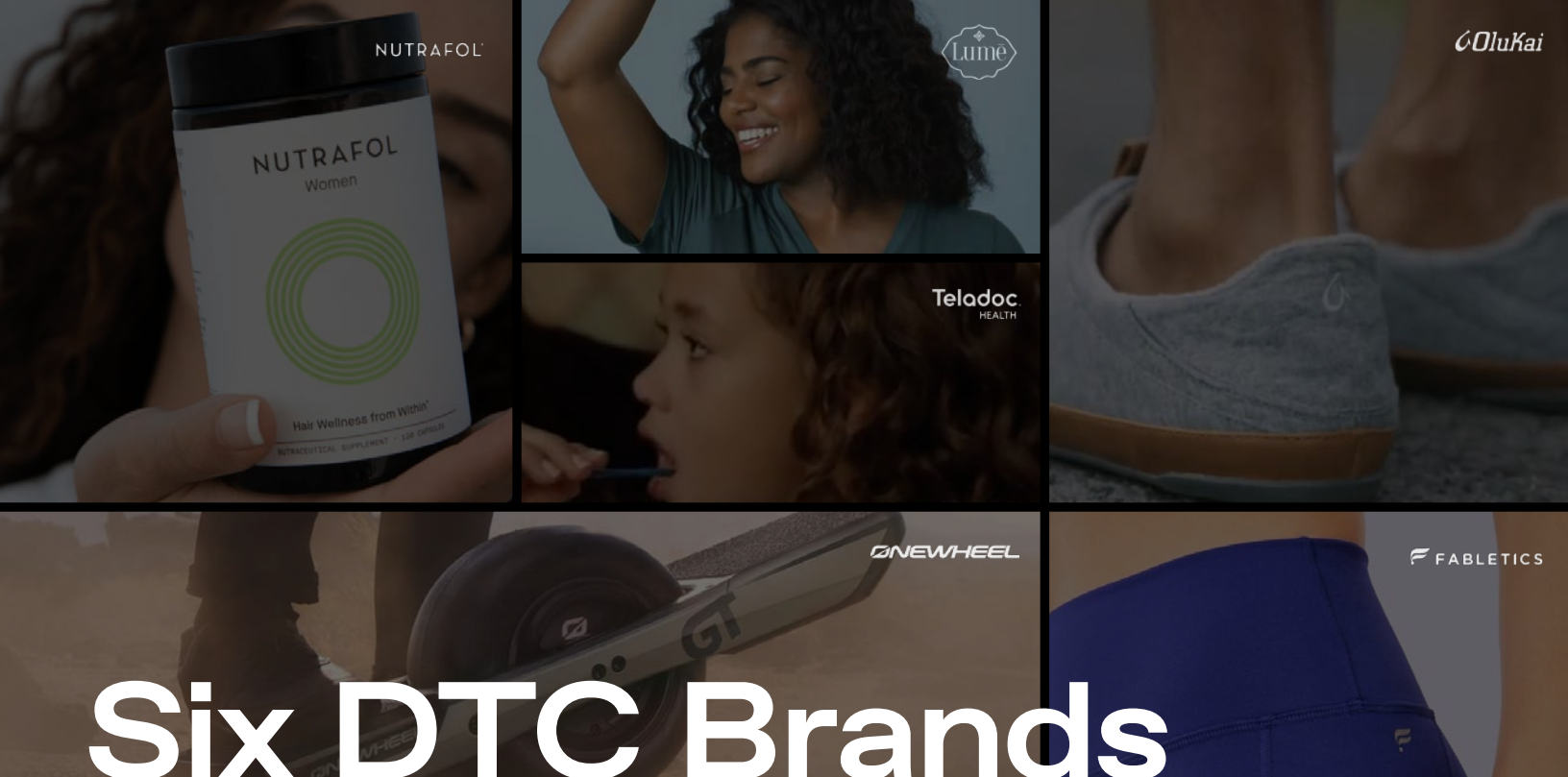
What is your biggest pain point when it comes to serving D2C shoppers?



Indeed, 27% of the respondents say WISMO inquiries are their biggest pain point when it comes to serving D2C customers, while 22% say accurate, timely fulfillment is their biggest pain point.

Brand manufacturers will likely prioritize technologies and platforms that support their fulfillment and customer services strategies. They recognize that succeeding in the D2C market depends on how well the brand can meet customer expectations.

After all, brand manufacturers operating in the D2C space are competing with other major eCommerce businesses, including Amazon. Beating Amazon in areas like order management and fulfillment is a significant challenge, so brand manufacturers need every advantage they can get.



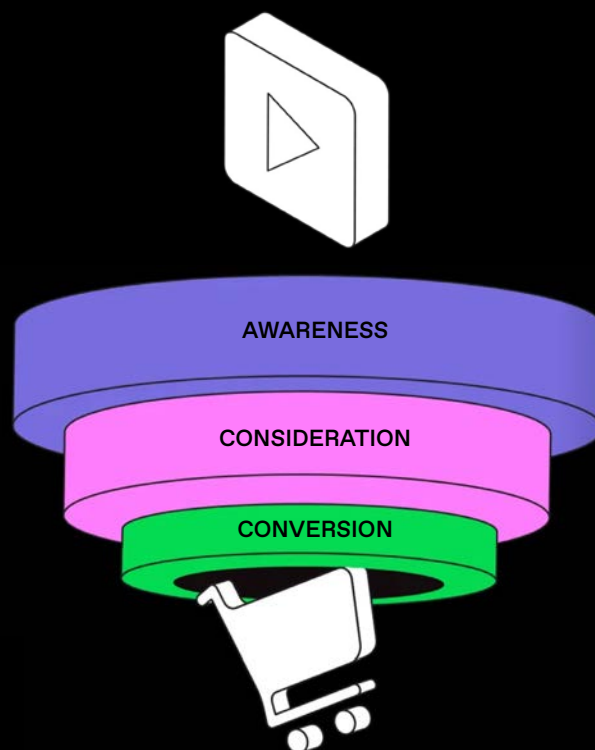
Six DTC Brands Find Full-Funnel Success on TV

TV is a multi-faceted advertising channel that can be as effective at driving conversions and measurable sales as it is at generating mass reach and awareness.

Tatari's advanced measurement and media buying capabilities equip brands with the tools necessary to truly optimize their TV campaigns.

See how six performance-driven clients are finding full-funnel success with linear & streaming TV in this exclusive, interactive experience.

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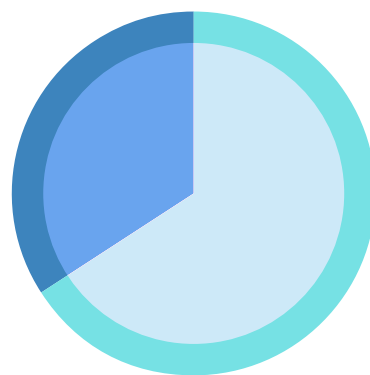
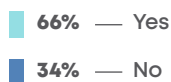


TV Advertising Offers Promising Results

Brand manufacturers in the D2C space are hyper-focused on building their online presence. As we've learned, they're employing several digital strategies to do so, including data-driven marketing. This extends to TV advertising as well.

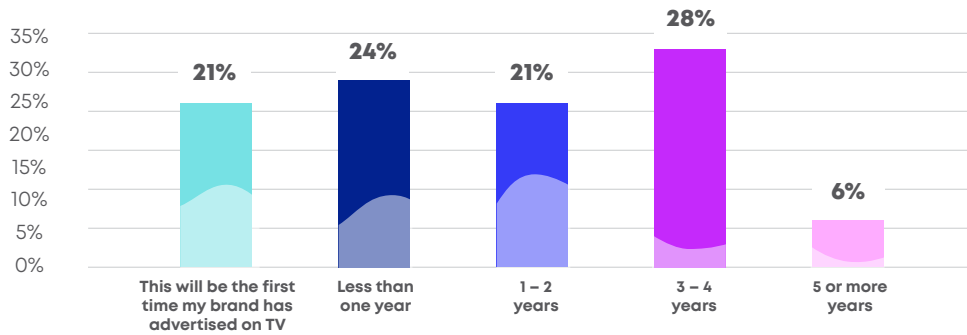
Both linear and streaming TV offer promising benefits to D2C organizations. Massive scale, highly targetable, and with the ability to measure (and optimize) campaigns in near-real-time. Today, D2C brands can manage TV campaigns just like digital.

Will you use either linear or streaming TV advertising to drive your D2C business in the next 12 months?



At 66%, most of the respondents plan to use either linear (traditional) or streaming TV advertising to drive their D2C business in the next 12 months.

How long has your brand been advertising on TV?*



*Only respondents who will use either linear or streaming TV advertising

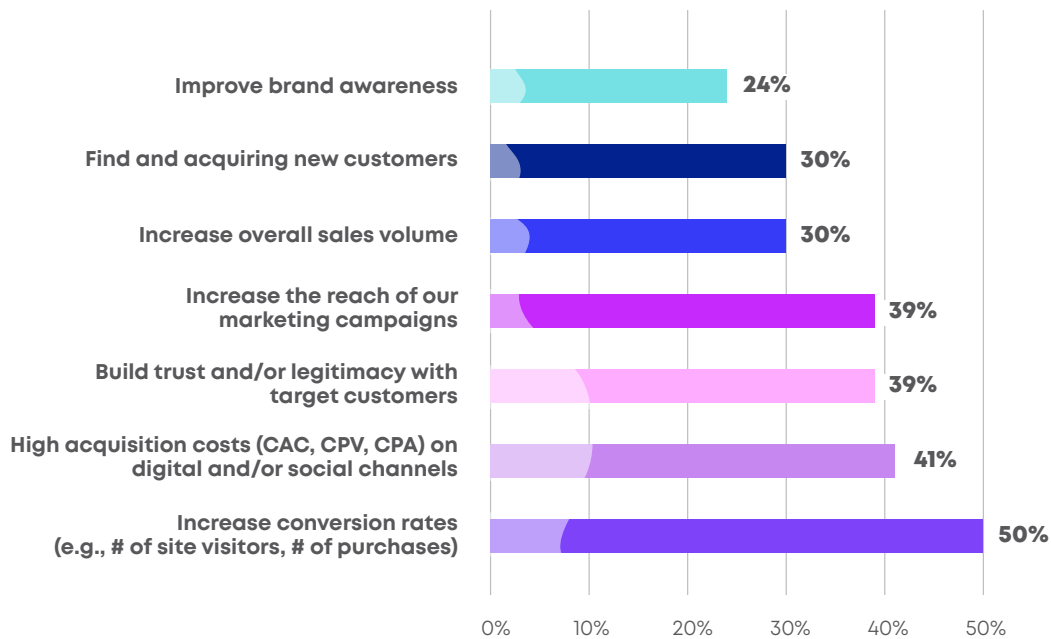
Among these respondents, most have already been using TV advertising as a marketing channel for at least one year. Nonetheless, 21% of these respondents say this is the first time their brands will have advertised on TV as part of their D2C strategy.

Even if brand manufacturers haven't previously used TV ads to reach customers

directly, they are entering the market at a time when there are more opportunities than ever to leverage linear and streaming TV for their performance advertising needs. TV advertising allows brands to reach customers through data-enabled personalization, similarly to how brands reach their customers on other digital channels.



What are or were the primary reasons your brand decided to test TV advertising?*



*Only respondents who will use either linear or streaming advertising

The top three reasons brand manufacturers are choosing TV ads are to increase conversion rates (50%), offset rising acquisition costs on digital channels (41%), and build brand trust or legitimacy with target customers (39%).

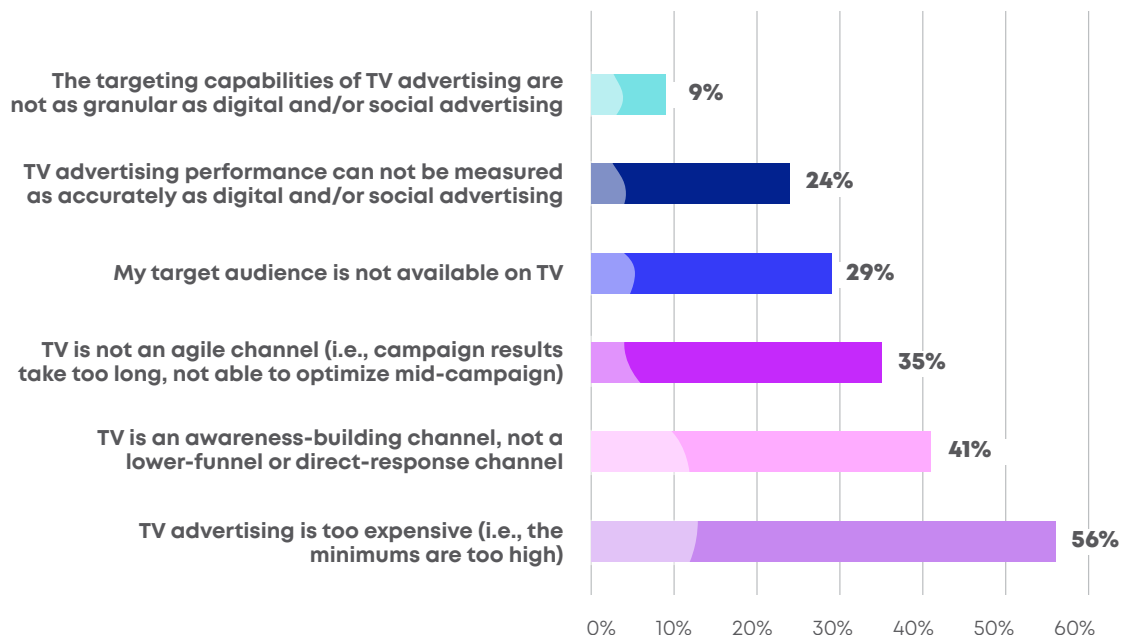
The respondents mirror these results in verbal responses. For example, one eCommerce VP from a health and beauty brand manufacturer says, “TV advertisements helped us transform the brand and gain attention from the desired customer segment.”

Similarly, an IT director at a home furnishing brand says, “TV advertisements have given our brand a personality that wouldn’t be possible without it.”

Other leaders note that customer acquisition has become “far easier” thanks to TV advertising, as one respondent puts it.

“TV advertising has helped us shape our retail journey,” says a customer experience VP from an auto and transportation brand. “In the future, TV will continue to be an essential platform for us.”

Since you will not use either linear or streaming TV advertising, what are the primary reasons that you are not doing so?



Among those respondents whose organizations aren't using TV advertising as part of their D2C strategy, most (56%) say this is because it is too expensive. Some (41%) believe TV is solely an awareness-building channel, or view TV as a channel that is not quite "agile" enough.

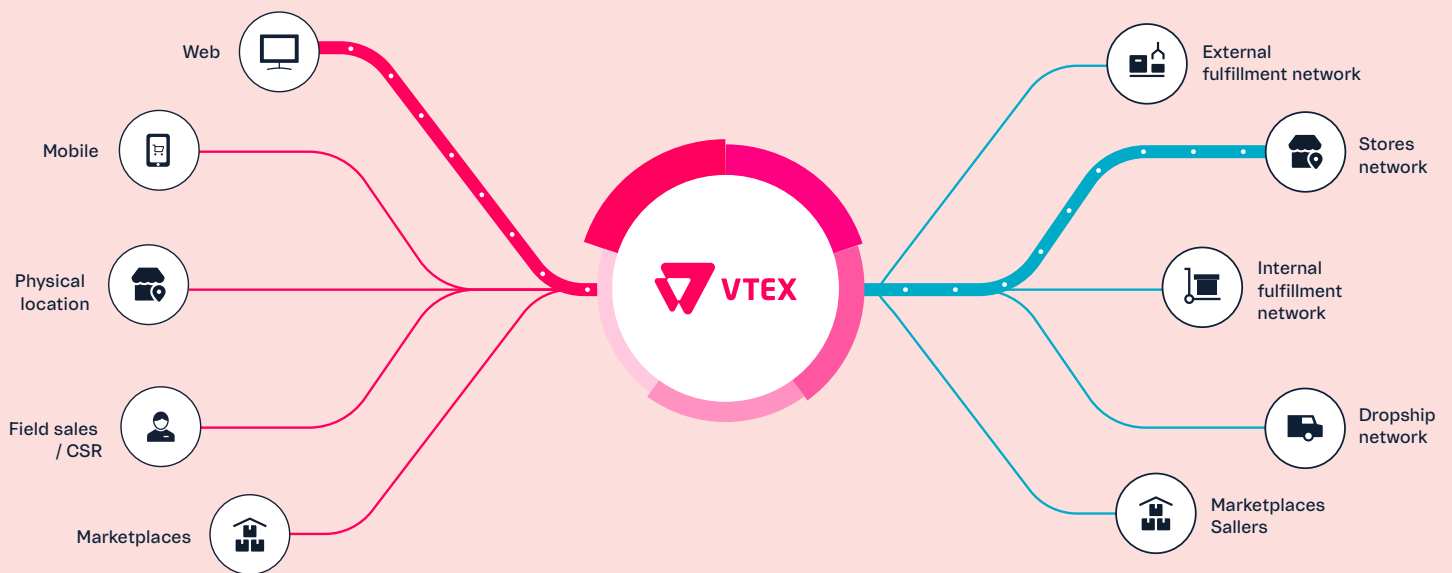
These respondents may be surprised about how measurable, agile, and attainable TV advertising can be today.

Many streaming services and performance-based TV ad tech companies allow brands to run initial campaigns for as low as \$50k. Once a slow process, campaign

performance is now captured in near real-time, which allows brand manufacturers to optimize their media placements mid-campaign. Some even offer optimization tools all the way down to the creative level, giving brands a true digital-like experience.

Attribution has also become much easier to track. Metrics like CPV, CPA, and ROAS can be measured and compared to brand benchmarks, debunking the myth that TV is strictly an upper-funnel channel. For brands that hope to sell directly to consumers, TV advertising may be too important a channel to pass up.

Explore new ways to sell and fulfill with a single commerce platform.



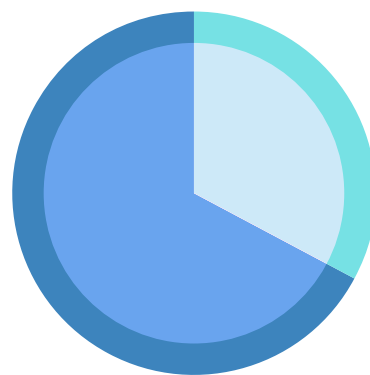
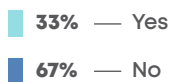
With global inventory visibility and multi-channel connectivity, VTEX enables you to give customers the choice and convenience they want, while you run an efficient omnichannel operation.

Most Brand Manufacturers Aren't Offering Subscription Services

One of the challenges D2C brands face is how to keep their customers engaged and coming back for more. A great way to do this is by offering a subscription service. This way, customers can be sure they'll always have access to the products they love, and the brand can build more customer loyalty around its D2C offerings.

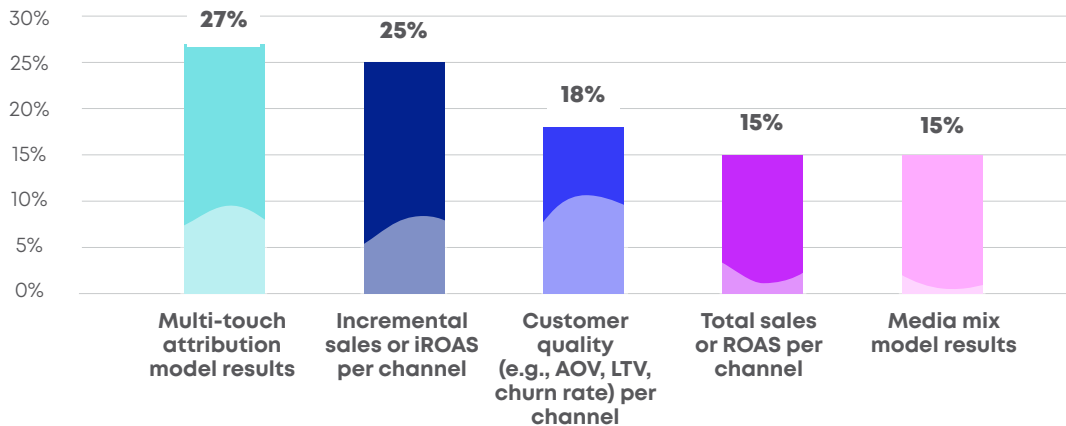
Nonetheless, not all D2C brands are sold on the idea of subscription services. Some worry that the subscriptions will be too difficult to manage or too expensive to maintain. It can also be challenging to design a subscription service that delivers consistent results, as customers' needs can change based on circumstances beyond the brand's control.

Do you offer a subscription service or product?



Currently, only 33% of the respondents are offering a subscription service or product. The remaining respondents may offer other loyalty programs, but they don't offer a service specifically designed around regular deliveries of products and services.

Since you do not offer a subscription service or product, which of the following is the primary metric you use to compare the effectiveness of one digital marketing channel to another?



Among these respondents, most use either multi-touch attribution model results (27%) or incremental sales or incremental return on investment (iROAS) per channel (25%) as their primary metrics when comparing digital marketing channels.

Multi-touch attribution is an effective means to measure marketing effectiveness across the brand's touchpoints. It may not provide the same types of data as a subscription-based service, but it can give the brand a better view of how customers interact with marketing and arrive at a purchase.

iROAS is a measure of the brand's return on ad spend, but it only measures the revenue received directly because of the company's marketing efforts. It's an effective means of identifying the direct relationship between specific marketing efforts and an increase in company revenue.

Brands that do offer subscriptions can reap substantial benefits in the form of customer loyalty, reliable revenue, and usable data. However, even with a successful subscription model, brands must be aware of some of the risks involved in subscriptions.

It is an unfortunate reality that existing subscribers may try to exploit new customer offers when they shouldn't. This can result in missed revenue opportunities or even false indications of customer traffic.

Many of the respondents say they avoid this risk by only offering pay-first subscription models with no free trials. However, others use a mixture of policy and technology to avoid these "cheats."

"There are strict policies and security checkpoints that avoid any loopholes in the subscription system," says an eCommerce director from a telecommunications company.

"We have multiple data and identification touchpoints that support the subscription side," says an eCommerce director at an auto and transportation brand. "We keep campaigns simple to avoid any challenging situations."

While these types of incidents aren't widespread, they happen often enough that they can impact the bottom line. For this reason, brands must develop a series of offerings, policies, and security checks to prevent subscription and loyalty fraud.

Conclusion:

Expanding the D2C Experience

D2C is an important strategy for many brand manufacturers, and consumers are more likely than ever to take advantage of special deals with brands via digital channels. With the right approaches, D2C will continue to help brands boost revenue and expand into new markets.

However, this report reveals that the D2C sales and marketing process does involve challenges. Brands that are still heavily dependent upon retailers to reach their customers may need to make investments in new technologies while also exploring new options for marketing and advertising. This includes digital marketing, such as through social media, and more traditional forms of marketing, such as TV advertisements.

Data has become an essential resource in the D2C market. Consumers expect digital commerce brands to understand their needs, deliver their orders on time, and provide them with a fast and comprehensive post-purchase experience. These are all capabilities brands must establish to be successful with D2C.

Key Suggestions

- **Create a strong value proposition.**
D2C brands need to offer something unique and differentiated from what is already available in the market, including what customers may find on retailers' shelves. Subscription models must also deliver substantial value that customers can't find elsewhere.
- **Build a brand that people can trust.**
If customers are to buy directly from you, they need to believe in your brand and feel confident that they will receive a quality product or service. You can leverage the channels your customers trust most, such as digital and TV, to establish more brand awareness and trust.
- **Invest in technology and automation.** D2C brands rely heavily on technology to reach and engage customers, so it's important to invest in the right tools and platforms.

Automating key processes can help the D2C business scale efficiently. Tools that aren't providing value to the company's D2C strategy should be reassessed or replaced.

- **Use a data-driven approach.**
D2C brands need to be able to collect and analyze customer data to make informed decisions about their business. Customer data is also integral to personalization, which is necessary for effective advertising.
- **Use multi-touch attribution model results and iROAS per channel as metrics.**
These are the most popular metrics for digital channel effectiveness among the respondents, and they can reveal key insights about the effectiveness of your strategy.

2022 Events Calendar



eTail

August 8-10, 2022 • Boston, MA
etailboston.com



eTail CONNECT

September 14-16, 2022 • La Jolla, CA
etailconnectwest.com



eTail

September 28-29, 2022 • Toronto, ON
etailca.com



eTail

February 27-March 2, 2023 • Palm Springs, CA
etailpalmsprings.com

About the Sponsors



Narvar's post-purchase platform enables retailers to engage with consumers beyond the "buy" button through branded order tracking, delivery notifications, and returns & exchanges. Through their partnership with Narvar, many of the world's most-admired brands are building more trust with shoppers and growing customer lifetime value. Recognized by Fast Company as one of the most innovative companies of 2021, Narvar is honored to simplify the lives of consumers and retailers alike.

For more information, please visit <https://corp.narvar.com>.



Tatari is a data & analytics company focused on buying and measuring ads across linear and streaming TV. We have turned TV advertising into a digital-like experience: measured, real-time, and with the ability to manage campaigns in small or big doses.

For more information, please visit www.tatari.tv.



Cardlytics is an advertising platform in banks' digital channels. With visibility into over half of all credit and debit card transactions in the US, we use relevant purchase data to uncover actionable insights about where, when, and how much consumers are spending - both with you and your competitors.

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VTEX (NYSE: VTEX) is the enterprise digital commerce platform where global brands and retailers run their world of commerce. VTEX puts its customers' business on a fast path to growth with a complete Commerce, Marketplace, and OMS solution. VTEX helps global companies build, manage and deliver native and advanced B2B, B2C, and Marketplace commerce experiences with unprecedented time to market and without complexity.

As a leader in digital commerce platforms, VTEX is trusted by more than 2,400 customers, including Abinbev, Carrefour, Colgate, Motorola, and Whirlpool, having over 3,200 active online stores across 38 countries (as of FY ended on December 31st, 2021). For more information, visit www.vtex.com.



Treasure Data is a best-of-breed enterprise customer data platform (CDP) that powers the entire business to reclaim customer-centricity in the age of the digital customer. We do this by connecting all data into one smart customer data platform, uniting teams and systems to power purposeful engagements that drive value and protect privacy for every customer, every time. Trusted by leading companies around the world, Treasure Data customers span the Fortune 500 and Global 2000 enterprises.

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About the Authors



WBR Insights is the custom research division of Worldwide Business Research (WBR), the world leader in industry-driven thought-leadership conferences. Our mission is to help inform and educate key stakeholders with research-based whitepapers, webinars, digital summits, and other thought-leadership assets while achieving our clients' strategic goals.

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eTail

We launched eTail in 1999 and have been dedicated to supporting the growth of the retail industry ever since. What started off as 100 people in a room discussing where this sector is headed, has led to 2,000 senior-level eCommerce executives being inspired whilst learning and developing their company as well as their careers.

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