



IAB 250 Direct Brands to Watch

Insights and Examples

A red starburst graphic with multiple points, containing white text.

NOW WITH
100 DTC Services
to Watch!

The IAB 250 to Watch in 2020: Products



APPAREL & FASHION



BABY CARE & PARENTING



BEER/WINE/ALCOHOL



CONSUMER ELECTRONICS



FOOD & BEVERAGE



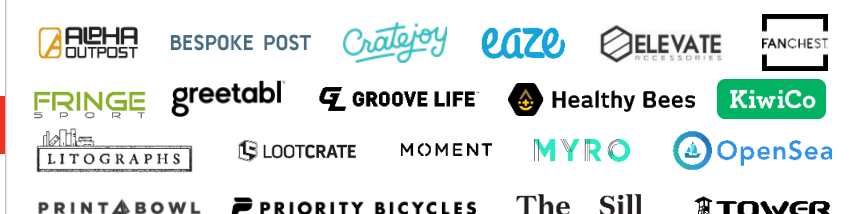
PETS



HEALTH & WELLNESS



HOBBIES & LIFESTYLE



HOME & APPLIANCE



PERSONAL CARE



Now with 100 Services!



APPAREL & FASHION

ANOMALIE KNOTSTANDARD LE TOTE
POSHMARK WILDFANG



BABY CARE & PARENTING

bark GREENLIGHT tinkergarten Wonderschool



EDUCATION

admitsee classkick codecademy
CODEMONKEY coursera duolingo ELSA
Explain Everything motion MATH Pear Deck picmonic
Preply PSYCHARMOR Institute SOLOLEARN
STUDY EDGE Studypool StudySoup TESTIVE



FINANCE

brigit PeerStreet Rare Bits
STASH TRIM



FOOD & BEVERAGE

BUTLER HOSPITALITY caviar chowbus DOORDASH
EatStreet FAVOR ANYTHING DELIVERED Gobble GOOD NCLE Gb
instacart LOCAL CRATE platejoy POSTMATES WAITR.



HEALTH & WELLNESS

Aaptiv AURA BLINK HEALTH Calm
classpass Grokker happify iCouch
INFINITERECOVERY LARKR learnolive ncd
nūtrimedý obé prescribeFIT shine
TEN PERCENT HAPPIER SOOTHE WHOOP zeel
Message On Demand



HOME & APPLIANCE

Grove COLLABORATIVE HAVENLY



HOBBIES & LIFESTYLE

CAMBLY GlampingHub jubel
meetmindful OpenBazaar sirenmarine
twigtole vimbly YOGATRIL



PERSONAL CARE

CORE MAYVENN



PET CARE

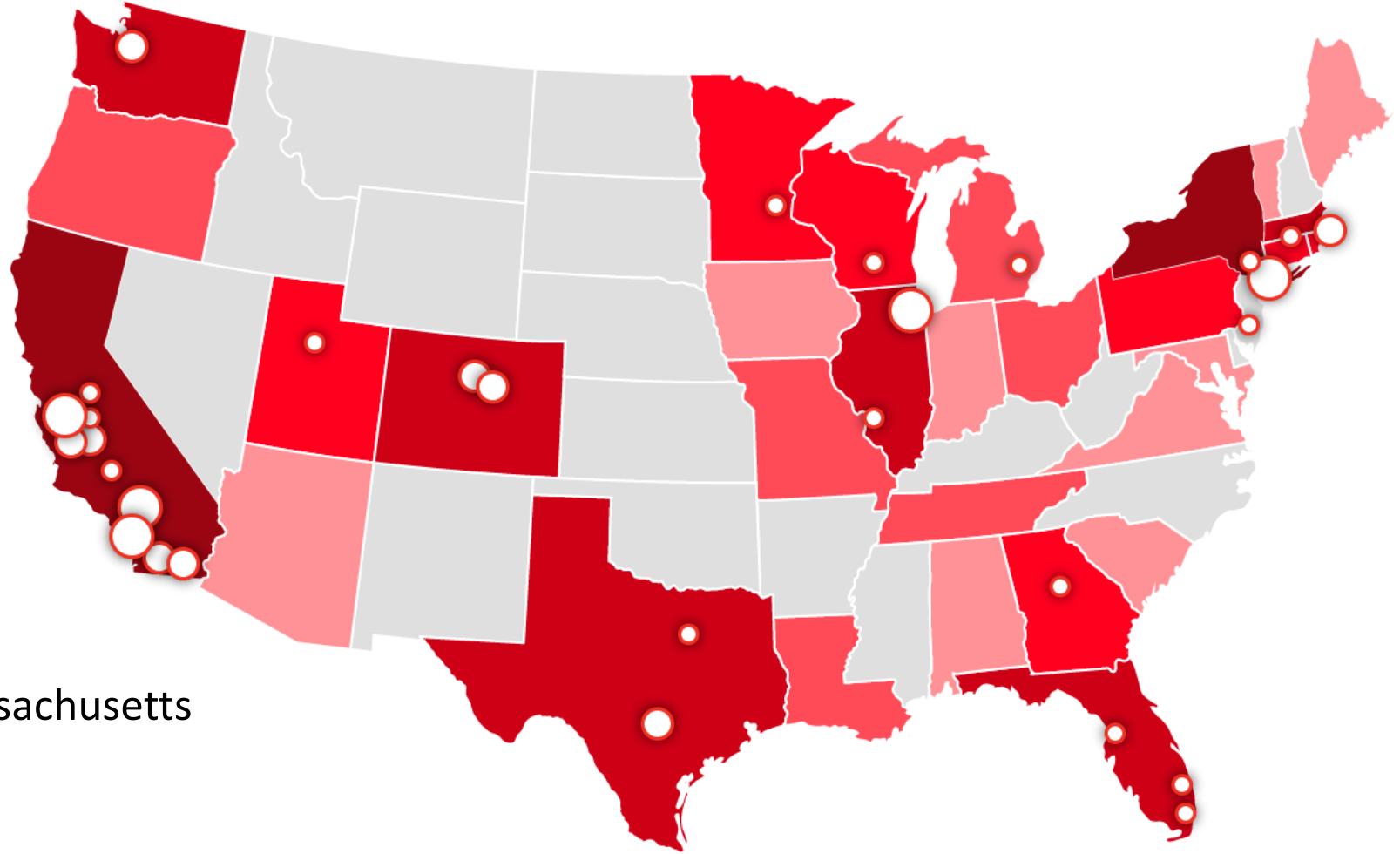
Wag!



TRAVEL

AllTheRooms. AtYourGate Chimani ENHANCING THE OUTDOORS domicile
dōmio eightydays Journey key
kimkim Lyft mozio OUTSITE
REMOTE YEAR. SONDER SUITENESS
TESLOOP TURO ViaHero

Headquarter Locations, Coast-to-Coast



1. California
2. New York
3. Colorado / Massachusetts
4. Florida / Texas
5. Illinois

TEA DROPS: VC Backed; Subscription; Passionate Online Community

FREE Mystery Drop in Every Order + FREE Shipping On Orders Over \$50!


TEA DROPS

EXPLORE OUR TEAS GIFTS ABOUT TEA DROPS JOIN TEA CLUB FIND A STORE REWARDS

🔍 🛒


FEBRUARY TEA & CHAT

DISCOVER THE SECRETS TO LOVE THAT LASTS



SASHEE

TEA & CHAT
with author
DR GARY CHAPMAN




GARY

THE 5 LOVE LANGUAGES®

GET 3 NEW TEA VARIETIES (15 DROPS),
THE TEA & CHAT INTERVIEW, AND A SURPRISE GIFT!

JOIN THE TEA CLUB



ONLY \$25 MONTH

Sign up!

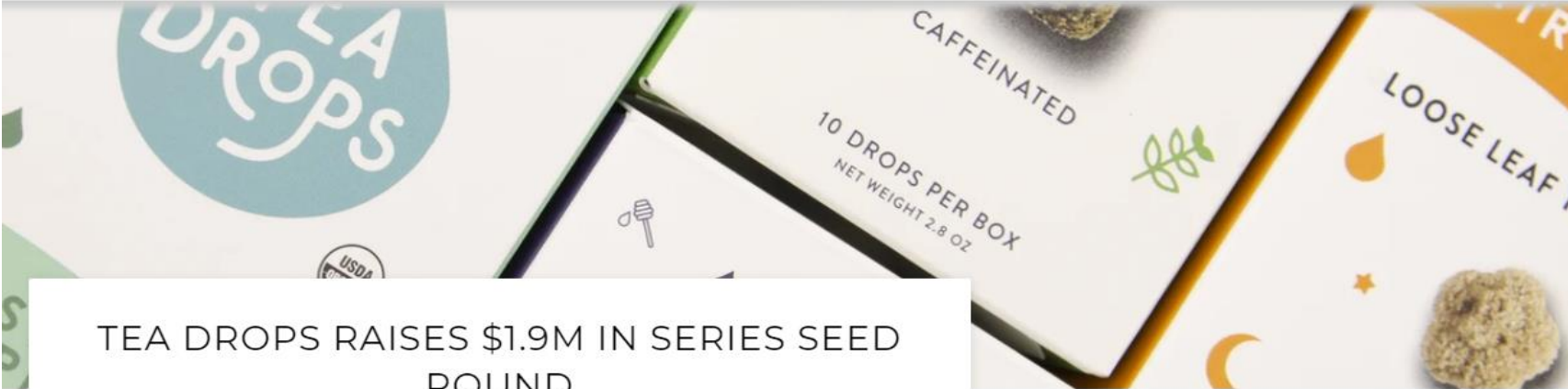
TEA DROPS: VC Backed; Subscription; Passionate Online Community

FREE Mystery Drop in Every Order + FREE Shipping On Orders Over \$50!

TEA DROPS

EXPLORE OUR TEAS GIFTS ABOUT TEA DROPS JOIN TEA CLUB FIND A STORE REWARDS

🔍 🛒






TEA DROPS RAISES \$1.9M IN SERIES SEED ROUND

Posted by **Isabella Tejada** on June 28, 2018

Tea Drops just closed a \$1.9M Series Seed round led by AccelFoods. In a majority female-funded capital raise, co-investors in this oversubscribed round included Halogen Ventures and Cue Ball Capital. Tea Drops is excited to use the capital to accelerate direct-to-consumer platform development, online acquisition and launch new products!

Read more about the raise here: <http://bit.ly/TeaDropsRaiseFN>

 SHARE  TWEET  PIN

BLOG

📡

TAGS

- ACAI BLUEBERRY
- ALLERGY
- ANTIINFLAMMATION
- AUTUMN
- BENEFITS
- BUNNY
- CALIFORNIA
- CARDAMOM SPICE
- CELEBRATELOVE
- CHICKS
- CITRUSGINGERICEDTEA
- COMMUNITY
- CURE
- DIY
- DRINKCLEAN
- EASTER
- ENERGIZING

Top Investors

The top 9 investors supported 31 DTCs on the 2020 IAB 250 Direct Brands to Watch list:

Company	# of DTCs
New Enterprise Associates	5
AccelFoods	4
Forerunner Ventures	4
Kleiner Perkins Caufield & Byers	3
Lerer Hippeau Ventures	3
M13	3
RRE Ventures	3
Tiger Global Management	3
Upfront Ventures	3

22 additional investors supported 44 DTCs:

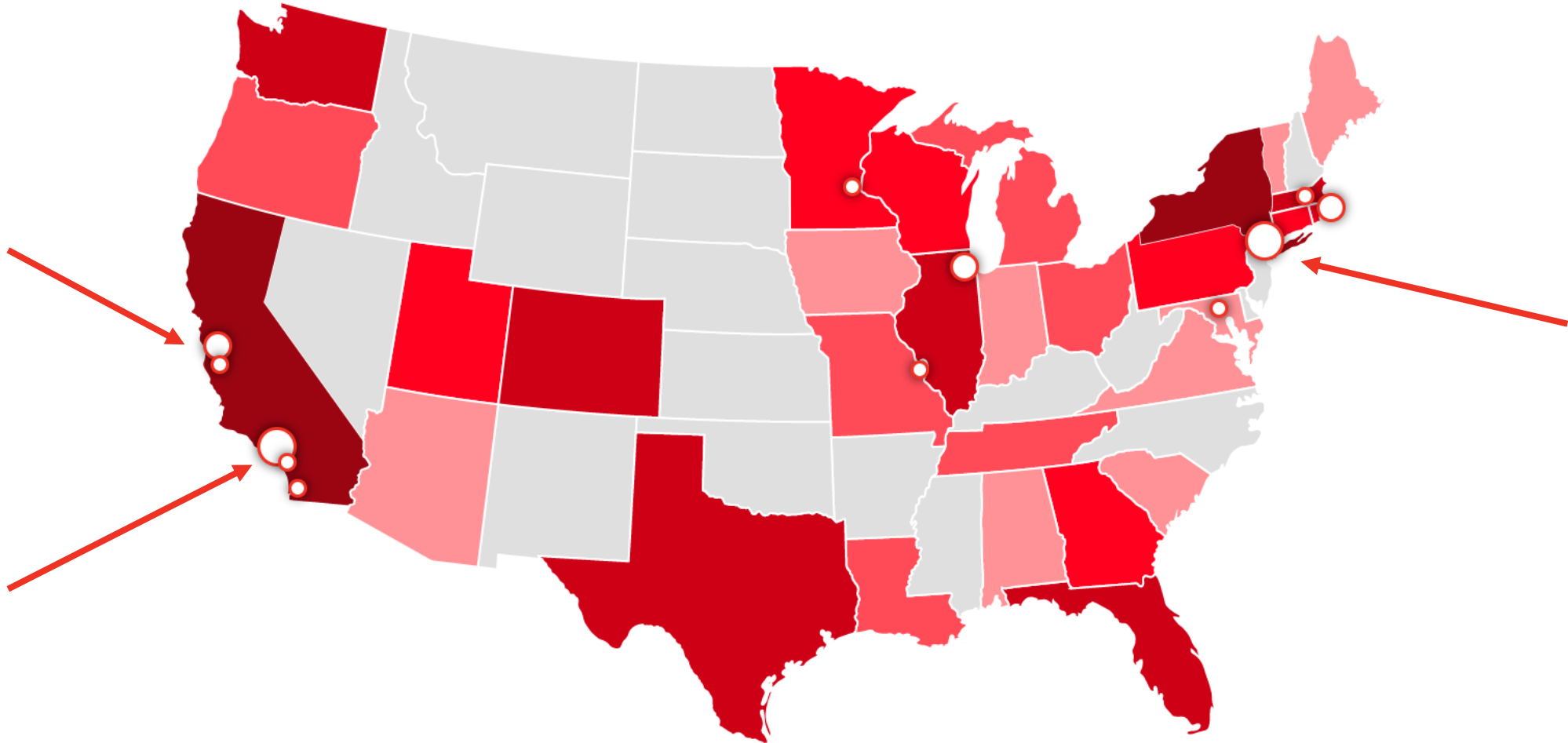
Company	# of DTCs
BAM Ventures	2
Brand Foundry Ventures	2
Burch Creative Capital	2
CanopyBoulder	2
CRV	2
Cue Ball Capital	2
Fidelity Investments	2
GGV Capital	2
Grace Beauty Capital	2
Greycroft	2
GS Retail	2
L Catterton	2
Ludlow Ventures	2
Maveron	2
Mousse Partners	2
Rosecliff Ventures	2
Shrug Capital	2
Simon Ventures	2
Spark Capital	2
VMG Partners	2
Wellington Management	2
Y Combinator	2

- Most DTC companies have multiple investors
- A total of 296 investors accounted for investment in 104 DTC companies in the 2020 IAB List




Note: The number of DTC companies with investment from top 9 and additional 22 VCs are not additive. Many DTCs have multiple investors.

The Heaviest VC Funding is Predominantly on the Coasts

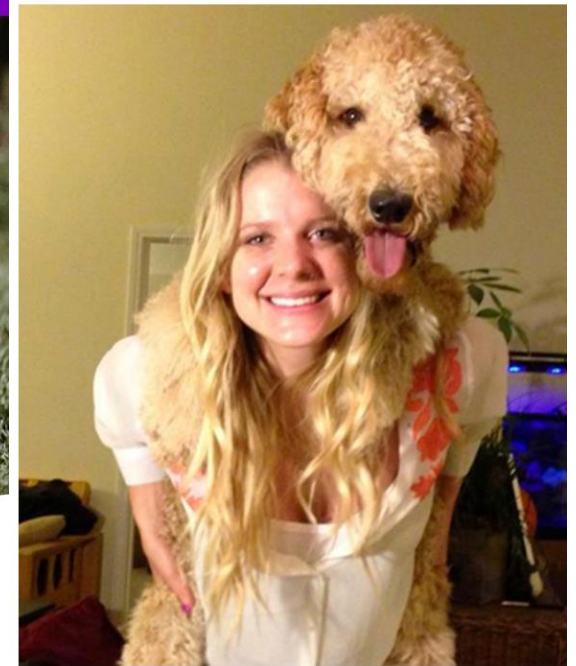
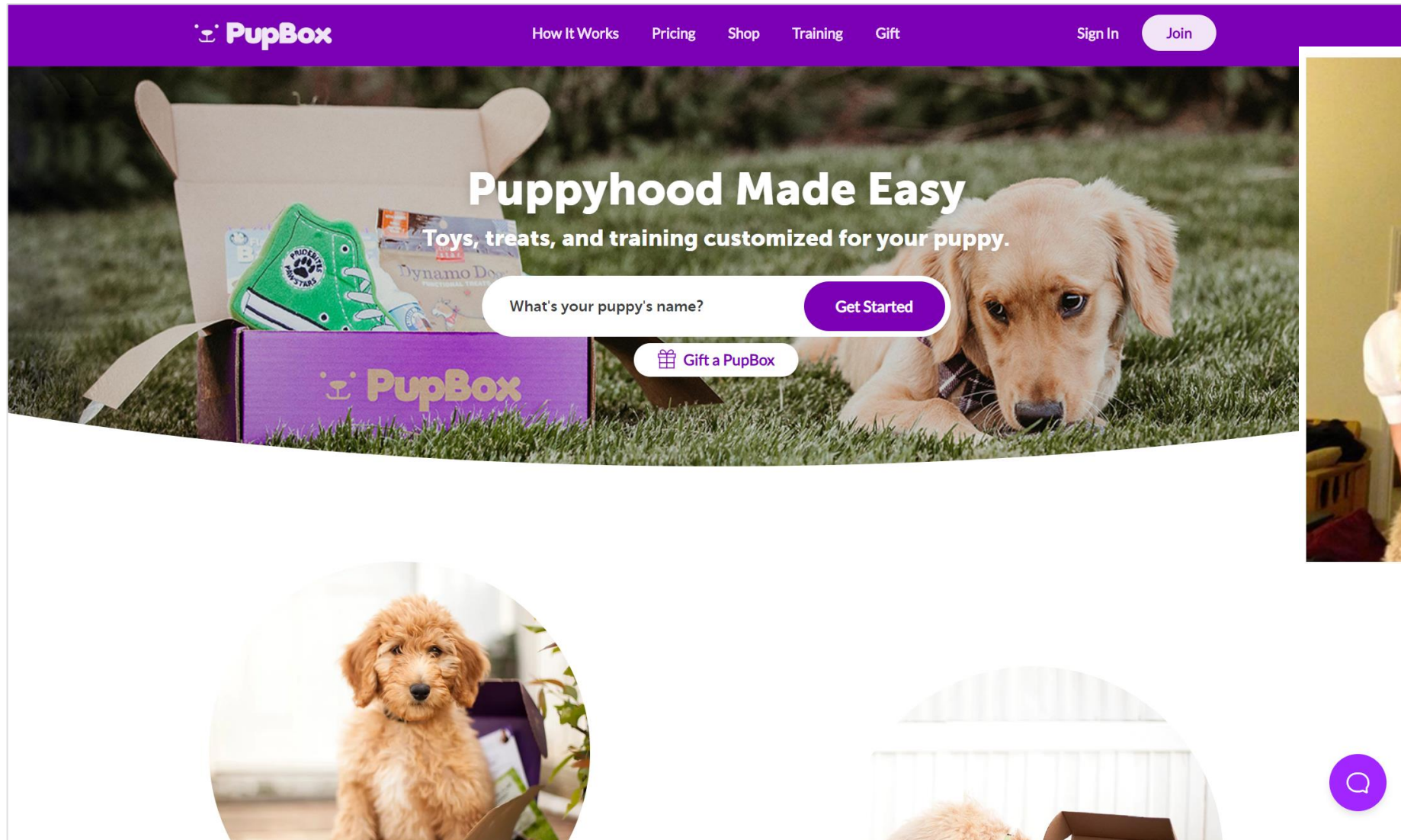
Nearly 90% of DTCs on the 2020 IAB “To Watch” list that have VC investment are hdq’d on the East and West coasts




Subscriptions: By Category

 BEER/WINE/ALCOHOL	 HOME & APPLIANCE	 FOOD & BEVERAGE
 VINEBOX	 cleancult	
 APPAREL & FASHION	 PERSONAL CARE	 HEALTH & WELLNESS
ADOREME ARMARIUM <i>Ellie</i> <i>fabfitfun</i> FOR DAYS MeUndies <i>Rowing Blazers</i> TRENDY BUTLER	Athena Club  FACETORY L. LOLI.  HONEST	 Aaptiv <i>Calm</i> classpass  <i>shine</i> zeel <small>Massage On Demand</small>
 BABY CARE & PARENTING	 PETS	 HOBBIES & LIFESTYLE
bitsbox CODESPARK ACADEMY PLEASE and carrots	PET PLATE 	 jubil  meetmindful  OpenBazaar
 FOOD & BEVERAGE	 APPAREL & FASHION	 HOME & APPLIANCE
BOXED  FUEGO BOX  HOME CHEF Misfits Market RAISEDREAL  SILVER TEA DROPS THRIVE MARKET  TRY THE WORLD veestro YUMI	LE TOTE	Grove <small>COLLABORATIVE</small>
 HEALTH & WELLNESS	 BABY CARE & PARENTING	 TRAVEL
AMPLE bintō <small>Essential Supplements for Women</small> care/of	 GREENLIGHT  Wonderschool	 AllTheRooms. Chimani <small>ENHANCING THE OUTDOORS</small> <i>domicile</i> dōmio  <i>eightydays</i>  key <small>THE CITY CONCIERGE</small>
 HOBBIES & LIFESTYLE	 EDUCATION	
 ALPHA OUTPOST BESPOKE POST <i>Cratejoy</i> greetabl KiwiCo  LOOTCRATE	admitsee  Explain Everything  PSYCHARMOR Institute <small>Educating a Nation</small> SOLOLEARN	 FINANCE
	STASH  TRIM	

PUP BOX: Subscription; Customized Over Time; Info + Product



PUP BOX: Subscription; Customized Over Time; Info + Product

[How It Works](#)[Pricing](#)[Shop](#)[Training](#)[Sign In](#)[Join](#)

Tell us about your furbaby to get started!


[CREATE PROFILE](#)

Getting Started


Joining the PupBox pack couldn't be easier!

Create your Pup's Profile.

We grow with your puppy! Our puppy profiler allows us to cater each box to the evolving needs of your baby. Each box is customized based on your puppy's stage of development and physical characteristics. Click 'Join' in the navigation bar to start building a sweet profile for your best furiend.



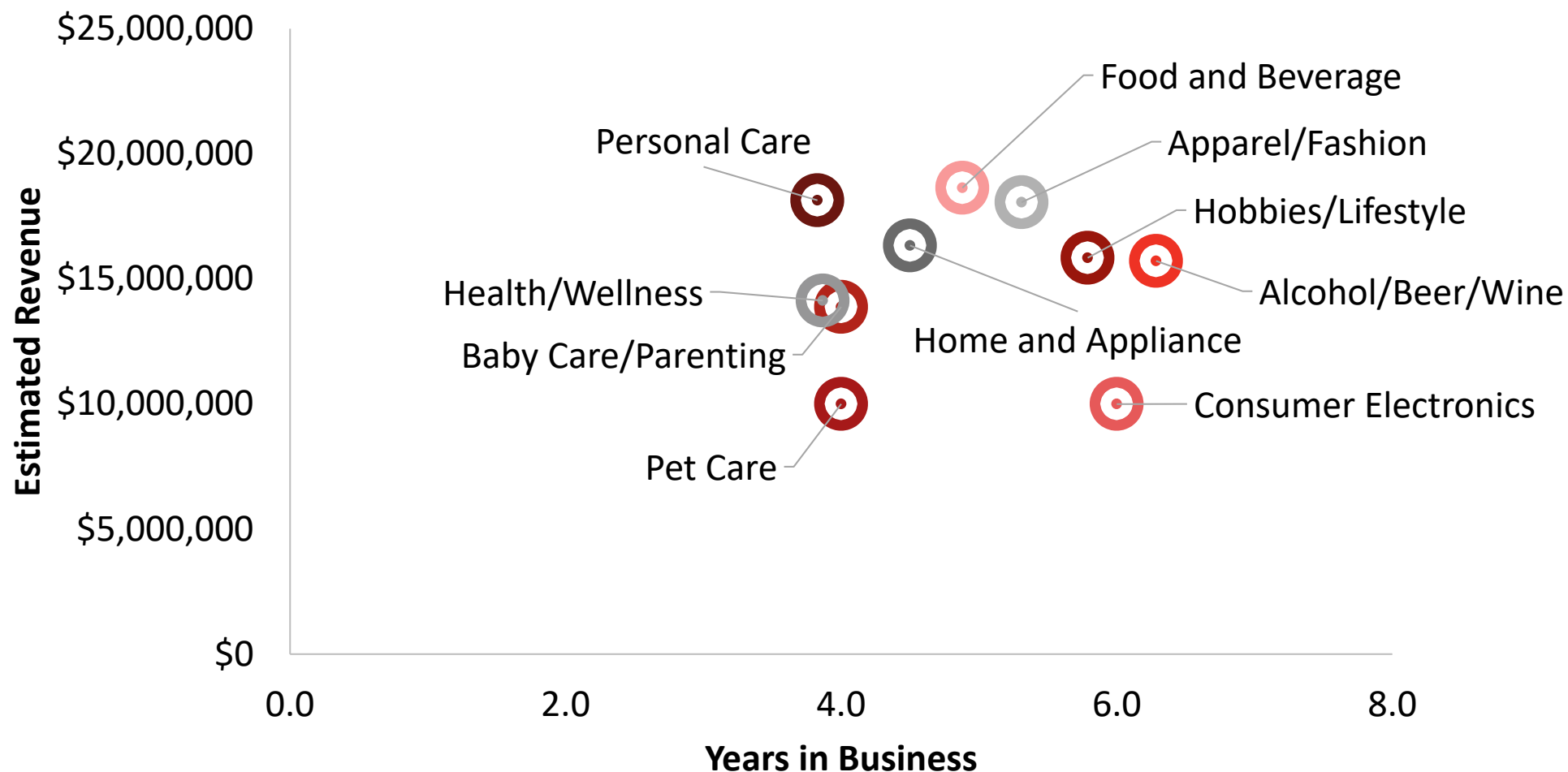
SPARKY
123 PARK WAY
UNITED STATES
(123) 456-7890



Category View: Where are the Hot Investment Opportunities?

Measured from launch date, the Personal Care vertical has experienced the fastest DTC revenue growth in the shortest time period—followed by Home & Appliance, Food and Beverage

Estimated Revenue vs. Years in Business



CHAIRISH: M/F Co-Founders; Curated Selection; Envision Before Buy

Chairish

Search



Log In



WINTER 2020

JUST IN

NEW + CUSTOM

FURNITURE

ART + WALL

LIGHTING

DECOR

RUGS

JEWELRY

SALE

IDEAS




MAD ABOUT

The February Edit

Our curators' cut of the most fab new arrivals.

SHOP NOW

CHAIRISH: M/F Co-Vounders; Curated Selection; Envision Before Buy



Search

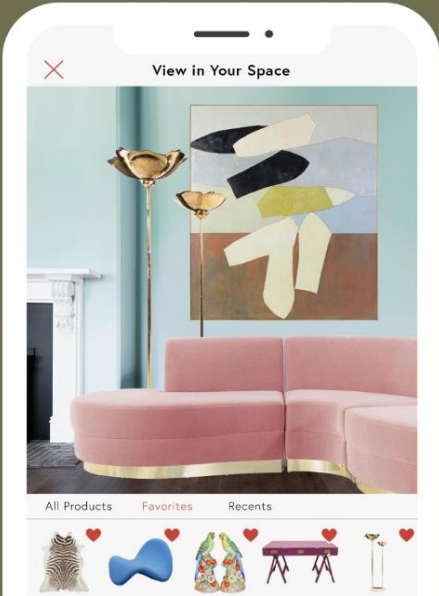
Log In

WINTER 2020JUST INNEW + CUSTOMFURNITUREART + WALLLIGHTINGDECORRUGSJEWELRYSALEIDEAS

As seen in...

ADThe New York TimesELLE DECORHouseBeautifulWSJInStyle


View in Your Space



Try It Before You Buy It!

Thanks to our iPhone and iPad apps, you can now "try out" one-of-a-kind items in your space before you buy them.


"It will change the way you shop for furniture online."
— Architectural Digest



TEXT ME A LINK:

(201) 555-5555

SEND



IAB Proprietary Research, 3.3.20

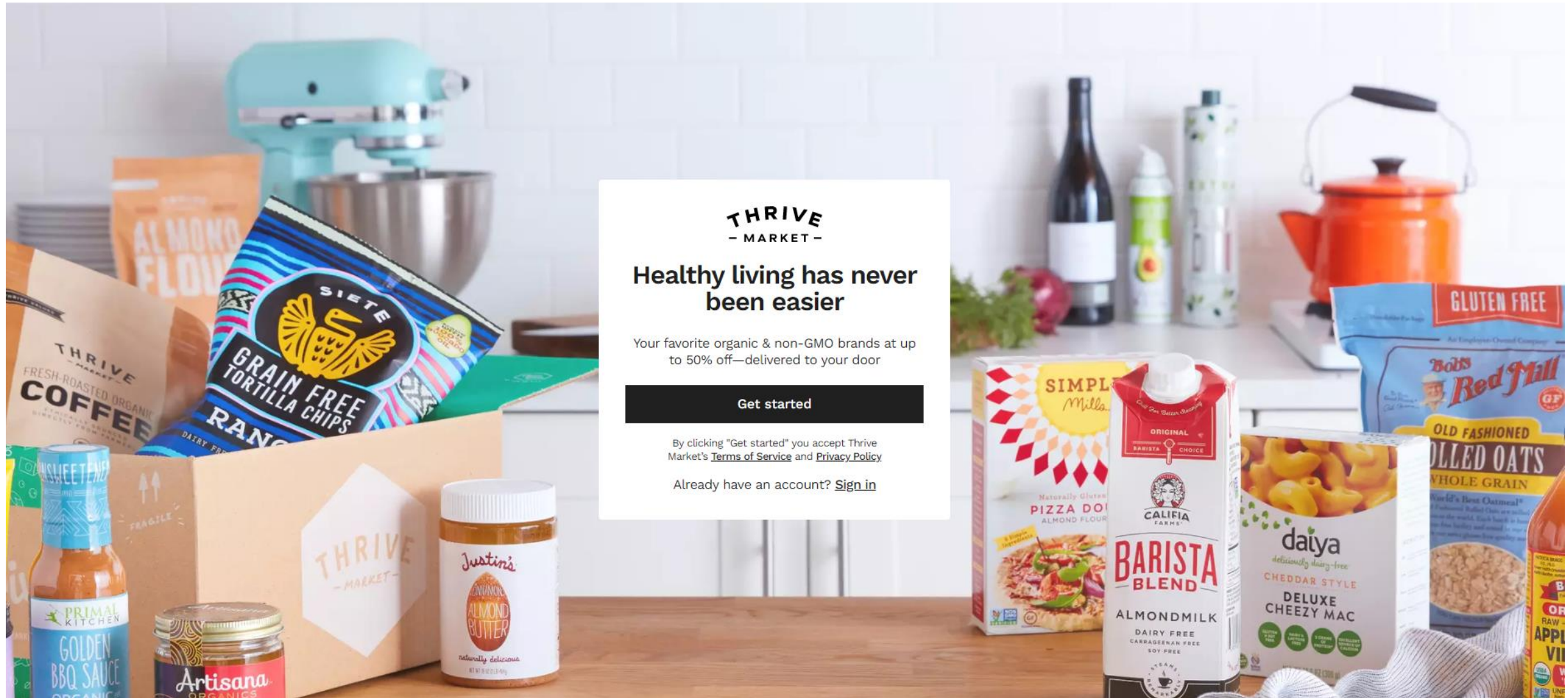
★★★★★

4.44 avg. from 7132

Verified Reviews

14

THRIVE MARKET: Top Tier Revenue; Subscription; Philanthropic



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Your favorite organic & non-GMO brands at up to 50% off—delivered to your door

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THRIVE MARKET: Top Tier Revenue; Subscription; Philanthropic

THRIVE
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When you join Thrive Market, you do more than just unlock your own savings. You also sponsor membership and shopping credit for low-income families, students, teachers, veterans, and first responders.

Learn more

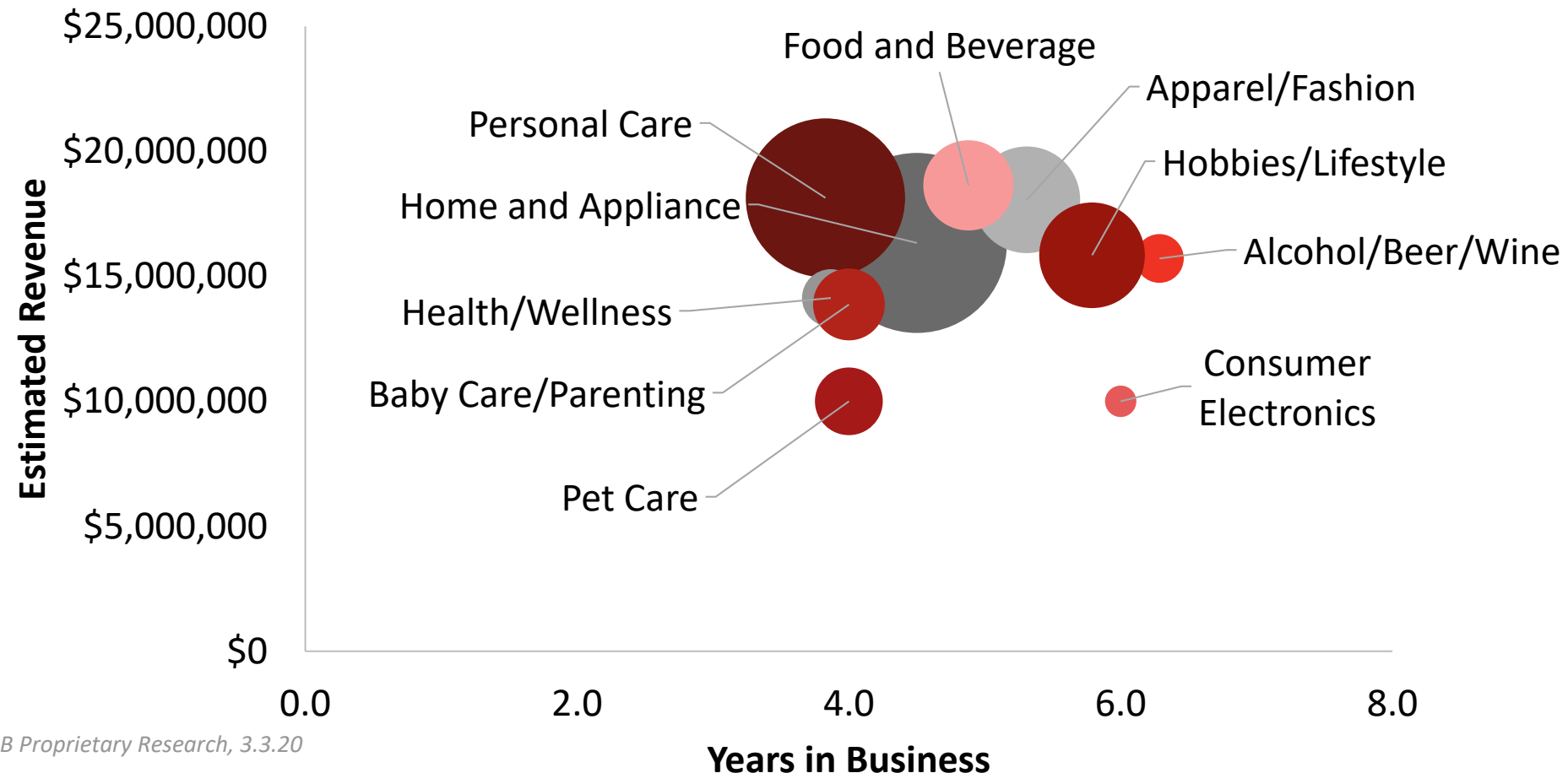


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Categories with a Smaller Social Footprint are Prime Targets for Media, Big Brands & VCs

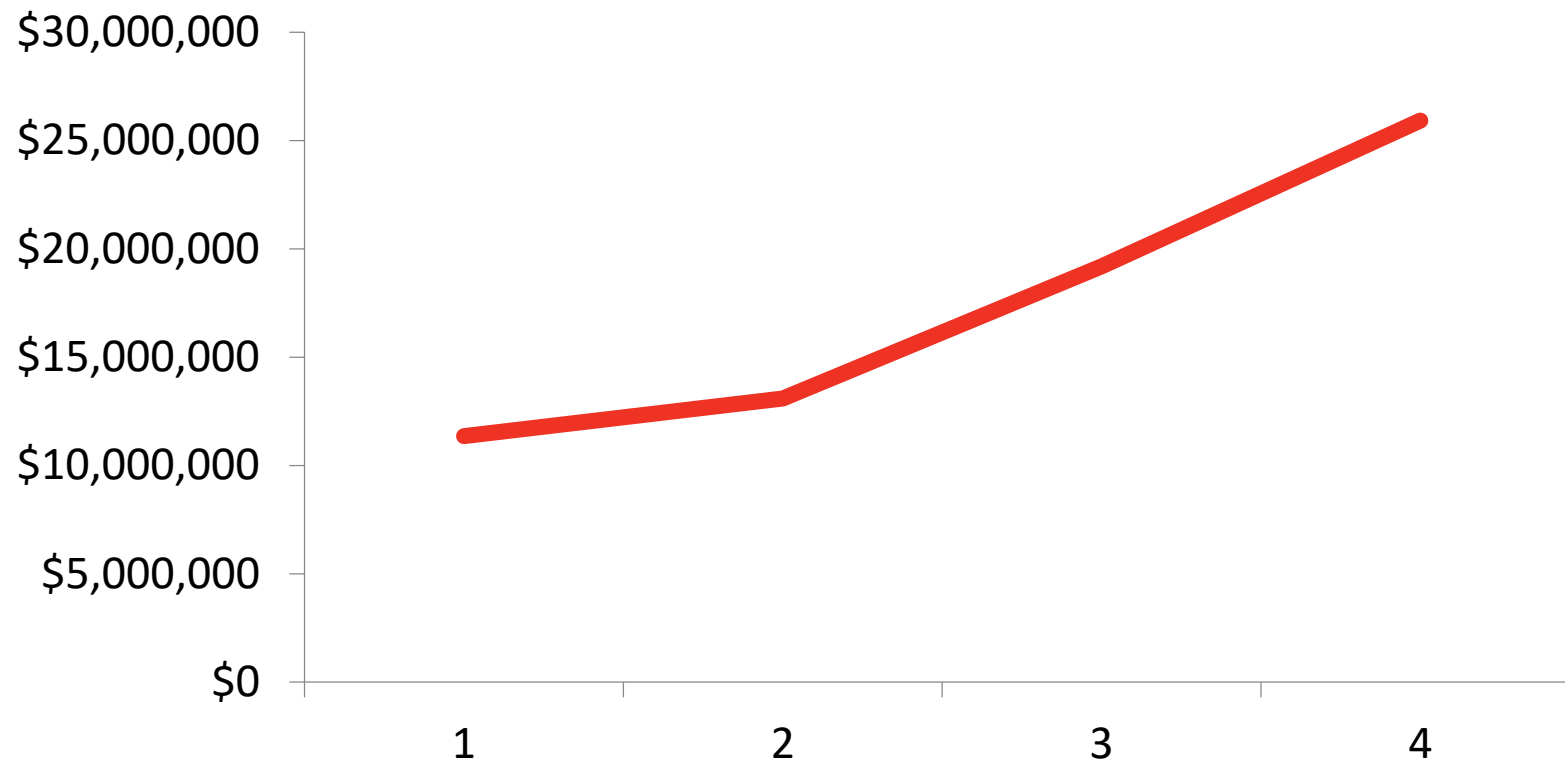
Health/Wellness, Baby Care/Parenting Followed by the Food & Beverage, Apparel/Fashion verticals are all in need of greater awareness, despite the fact that their revenue growth is fast

Estimated Revenue vs. Years in Business vs. Social Footprint Index



While a Higher Social Footprint = Higher Revenue...

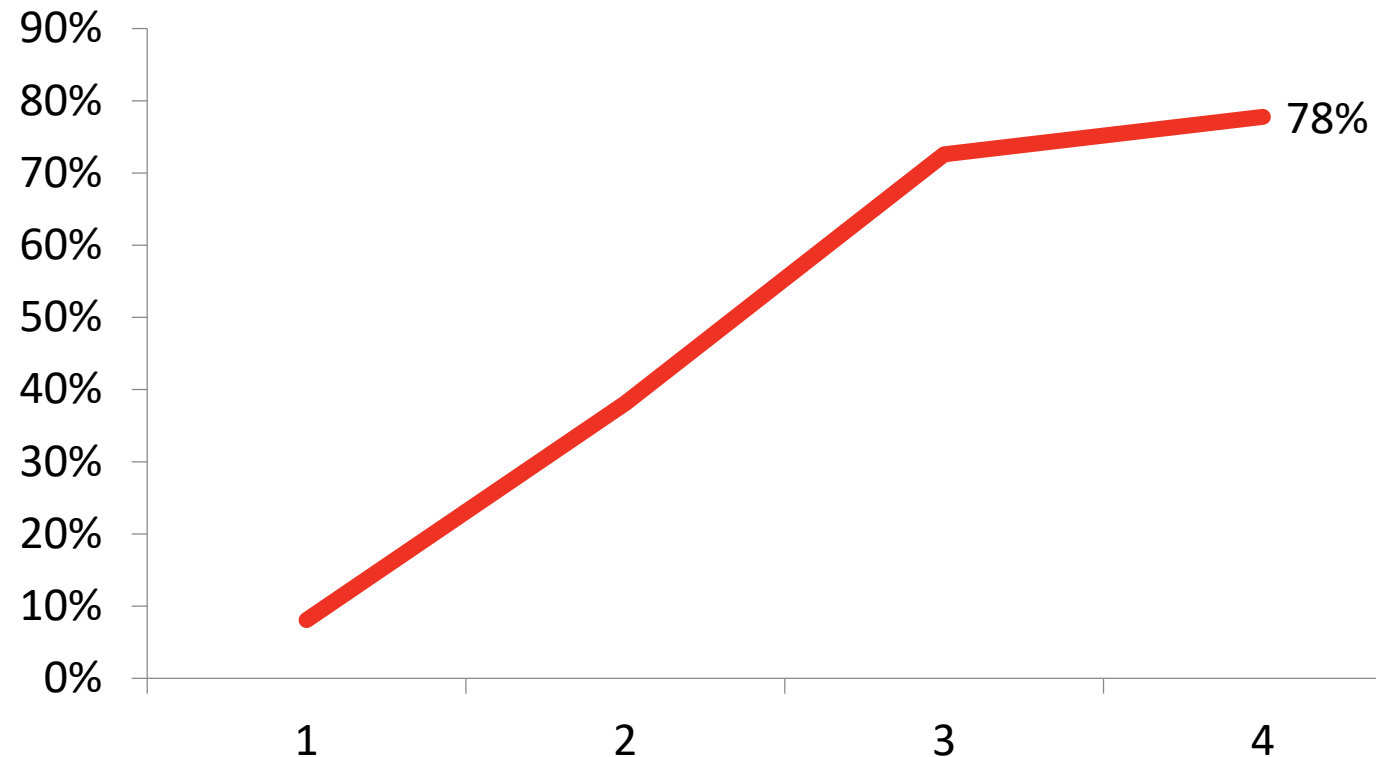
Estimated Revenue by Social Footprint Quartile



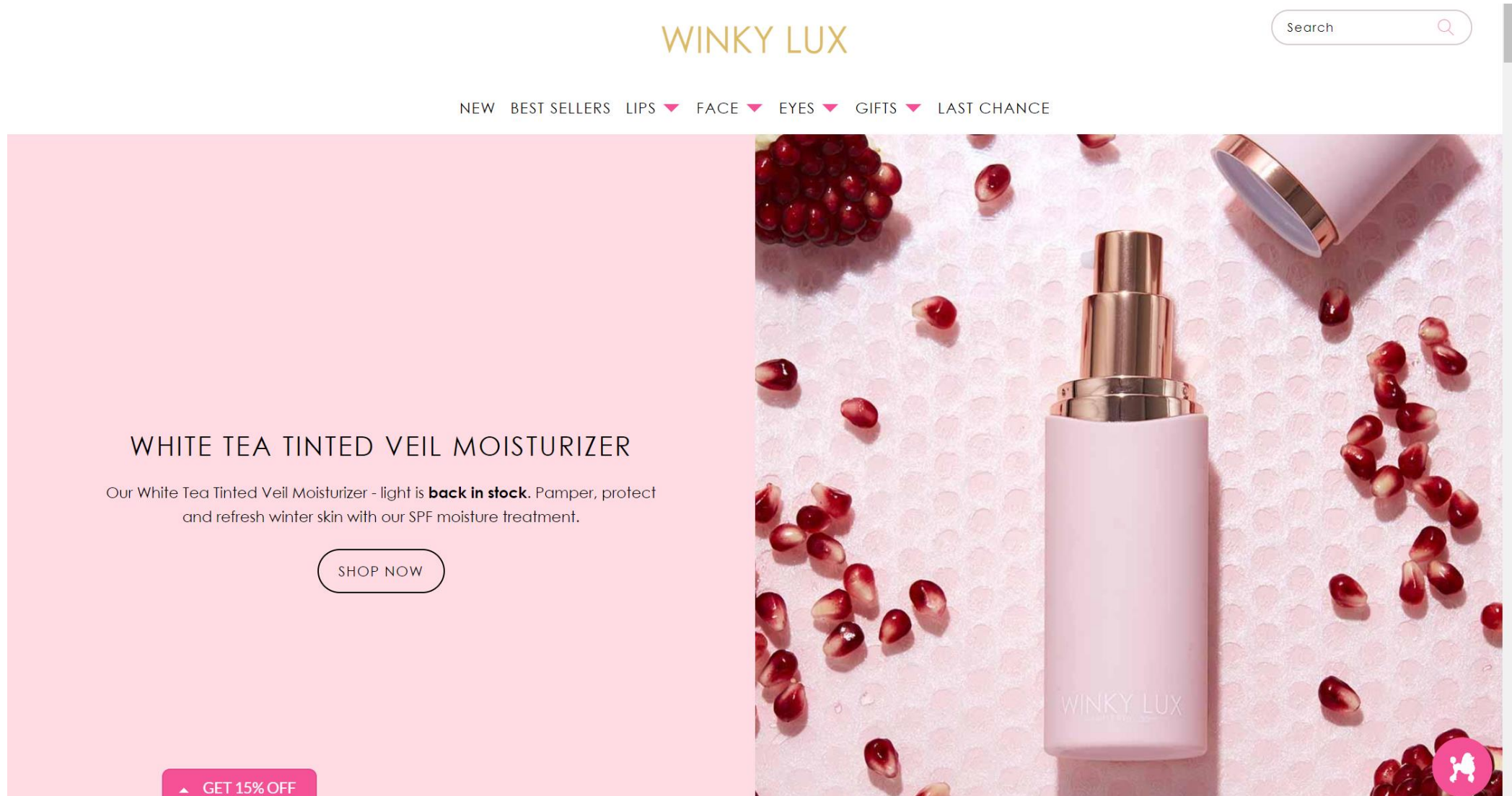
...Social Footprint and Digital Spend are Correlated

Smart, diversified media strategy can break the awareness plateau

% of DTCs Spending in Digital by Social Footprint Quartile



WINKY LUX: Room to Scale Up; Stack-Your-Own Supply Chain; Brick & Mortar



The image shows a website banner for Winky Lux. At the top, the brand name "WINKY LUX" is displayed in gold. To the right is a search bar with the word "Search" and a magnifying glass icon. Below the brand name is a navigation menu with links: "NEW", "BEST SELLERS", "LIPS" (with a downward arrow), "FACE" (with a downward arrow), "EYES" (with a downward arrow), "GIFTS" (with a downward arrow), and "LAST CHANCE". The main banner is split into two sections. The left section has a solid pink background and contains the product name "WHITE TEA TINTED VEIL MOISTURIZER" in black, followed by the text "Our White Tea Tinted Veil Moisturizer - light is **back in stock**. Pamper, protect and refresh winter skin with our SPF moisture treatment." and a "SHOP NOW" button. The right section features a photograph of the product bottle, which is light pink with a gold pump dispenser, surrounded by pomegranate seeds on a white textured surface. A small pink circular icon with a white dog silhouette is in the bottom right corner of the image.

WINKY LUX

Search

NEW BEST SELLERS LIPS ▼ FACE ▼ EYES ▼ GIFTS ▼ LAST CHANCE

WHITE TEA TINTED VEIL MOISTURIZER

Our White Tea Tinted Veil Moisturizer - light is **back in stock**. Pamper, protect and refresh winter skin with our SPF moisture treatment.

SHOP NOW

GET 15% OFF

WINKY LUX: Room to Scale Up; Stack-Your-Own Supply Chain; Brick & Mortar

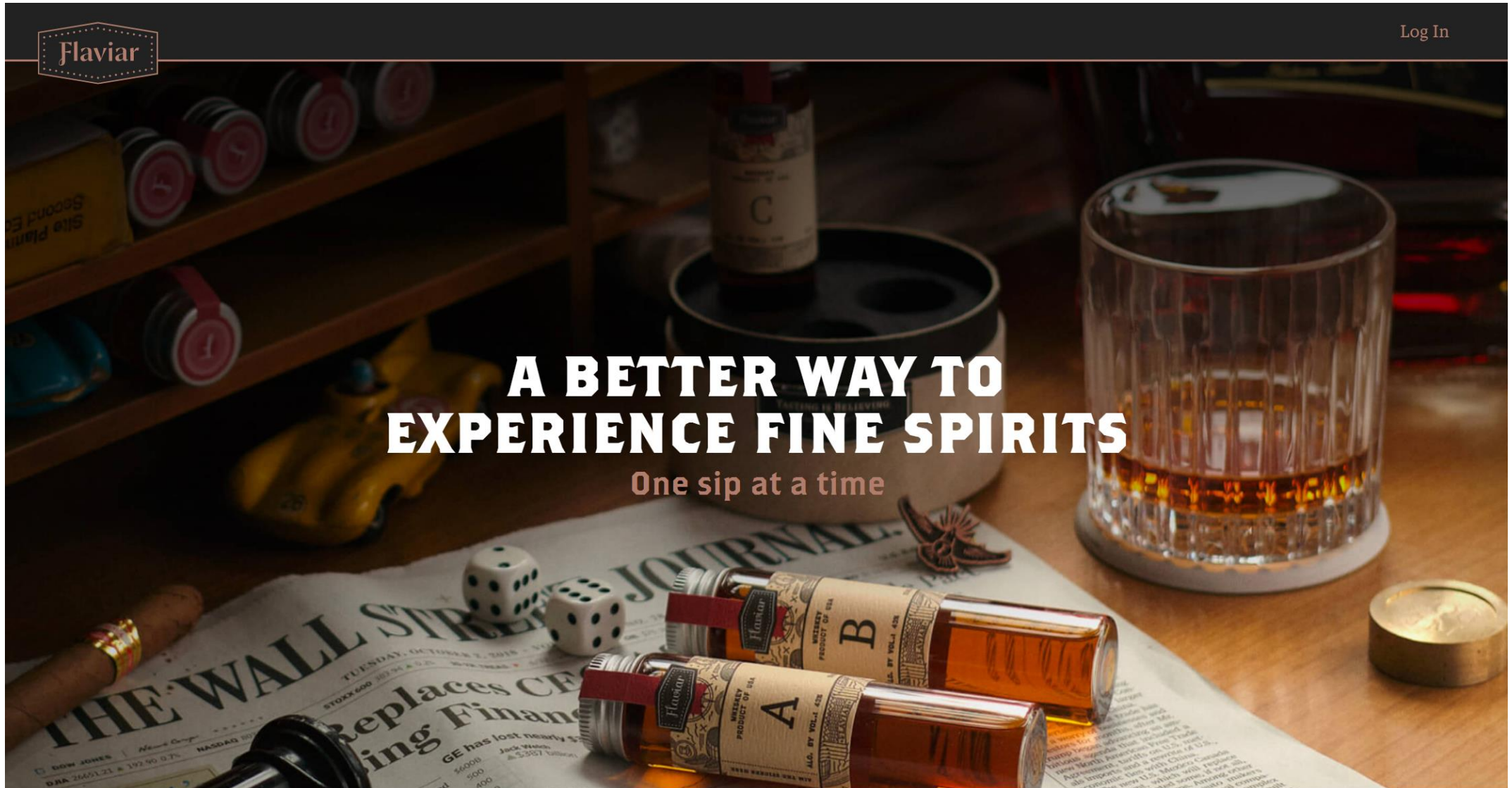
SHIPPING

Time is Money Honey! All products ordered before 3pm are shipped the same day and will arrive quickly. Lucky Manhattan poodles may request same day delivery for a \$10 fee. Some companies want you to wait a week! Ain't nobody got time for that.



Ps- It's no secret that we kind of like you...which means we'd love to hear from you. You can hit us up directly at OG@winkylux.com

FLAVIAR: High Growth/Social Correlation; Customer Experience & Satisfaction



FLAVIAR: High Growth/Social Correlation; Customer Experience & Satisfaction

TAKE IT OFFLINE AT MEMBER EXCLUSIVE EVENTS

Biggest craft spirits celebration?
Whiskey blending? Well, we want

AND WHAT THEY SAY ABOUT US?

1 out 1 people found this review helpful



Well done!

By Raphaël V., Belgium, Aug 16, 2019 • Verified Reviewer

I do appreciate 2 main things about Flaviar.

#1 - Their light, funny and engaging communication style.

#2- Their classy web design and packaging stuff.

Their lineup is rather broad and consistent.

Need time to get further acquainted.

Bottom Line: Yes, I would recommend this to a friend




















































GET YOUR HANDS ON DRINKS YOU CAN'T BUY ANYWHERE

We source rare & mysterious spirits and make great,
inaccessible drinks available to you.



Hey Big Spenders: Top DTC Digital Spend by Category

 ALCOHOL /BEER/WINE	 HEALTH & WELLNESS	 FOOD & BEVERAGE
	  	 
 APPAREL & FASHION	 HOBBIES & LIFESTYLE	 HOBBIES & LIFESTYLE
       	   	 <div>  HEALTH & WELLNESS </div>   
 CONSUMER ELECTRONICS	 PERSONAL CARE	 TRAVEL
	 	   
 FOOD & BEVERAGE		
        		

THIRD LOVE: Media Diversification; Consumer-Centric; Philanthropic

Bundle & Save! Get up to \$40 off + Free Shipping

THIRDLOVE

SHOP ▾

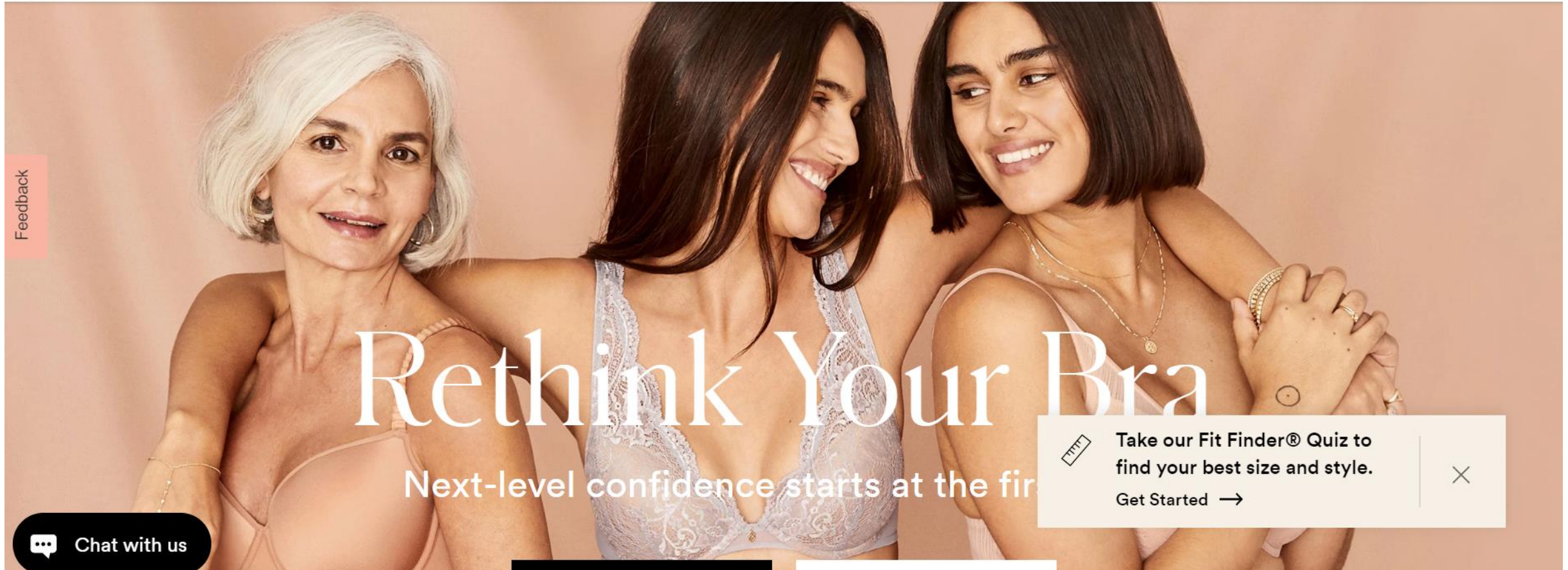
BRA 101 ▾

OUR STORY

REWARDS

FIT FINDER®

Free shipping over \$75



Feedback

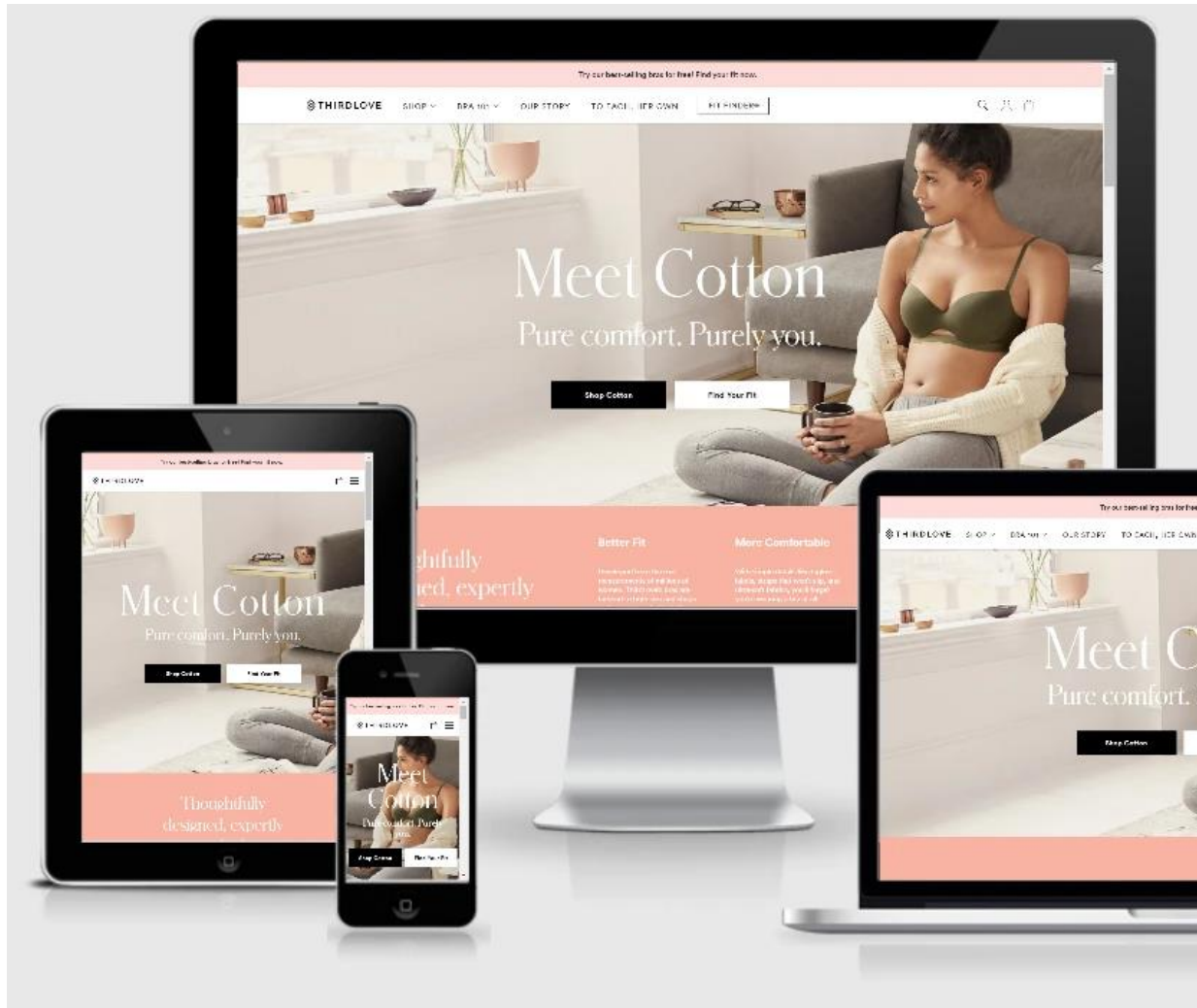
Rethink Your Bra

Next-level confidence starts at the first fit.

Take our Fit Finder® Quiz to find your best size and style.
Get Started →

Chat with us

THIRD LOVE: Media Diversification; Consumer-Centric; Philanthropic



Get started

Ads

Resources

Promoted Pins with one-tap boost traffic for ThirdLove

14 %

decrease in cost per acquisition

TEA DROPS: VC Backed; Subscription; Passionate Online Community... AND Women in Key Leadership Roles

FREE Mystery Drop in Every Order + FREE Shipping On Orders Over \$50!

TEA DROPS EXPLORE OUR TEAS GIFTS ABOUT TEA DROPS JOIN TEA CLUB FIND A STORE REWARDS

FEBRUARY TEA & CHAT

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TEA & CHAT with author DR GARY CHAPMAN

SASHEE GARY

THE 5 LOVE LANGUAGES®

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JOIN THE TEA CLUB

Let's Brew Some Teamagic!

POUR 8-12 oz. boiling water DROP ENJOY

SHARE YOUR #TEAMAGIC

ONLY \$25 MONTH

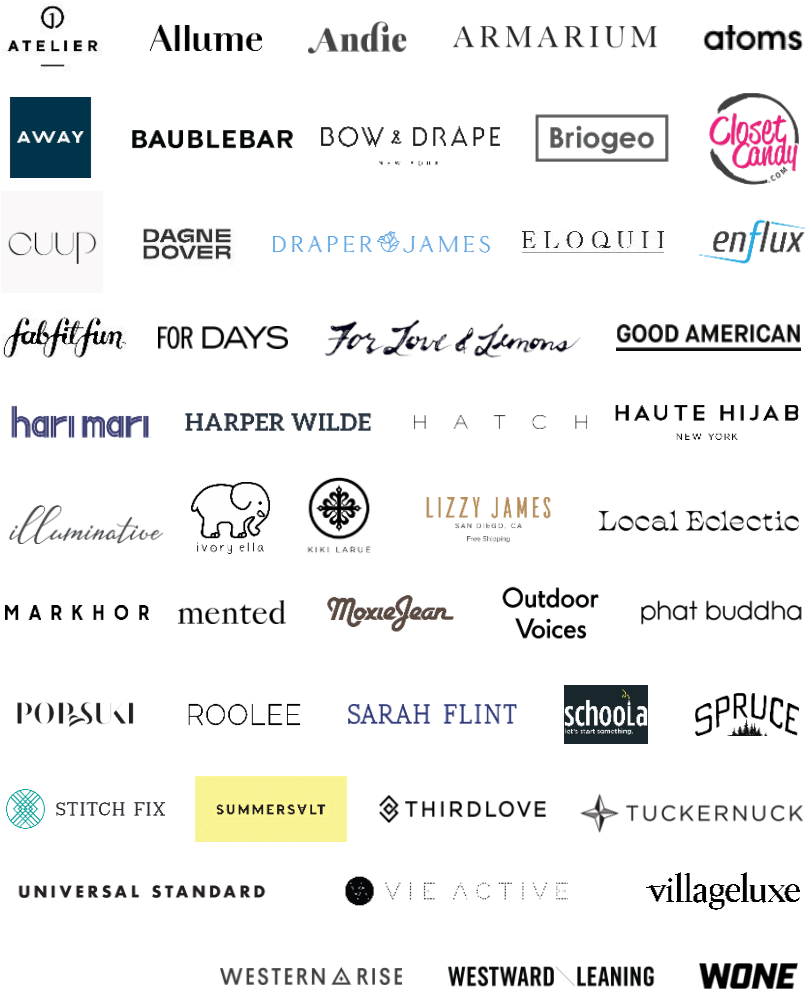
Sign up!

Women Founders by Category: Products

ALCOHOL/BEER/WINE



APPAREL & FASHION



BABY CARE & PARENTING

coterie

PLEASE
and carrots

CONSUMER ELECTRONICS



FOOD & BEVERAGE



HEALTH & WELLNESS



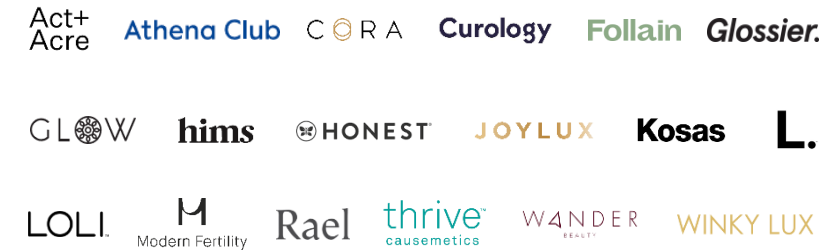
HOBBIES & LIFESTYLE



HOME & APPLIANCE












PERSONAL CARE



PETS

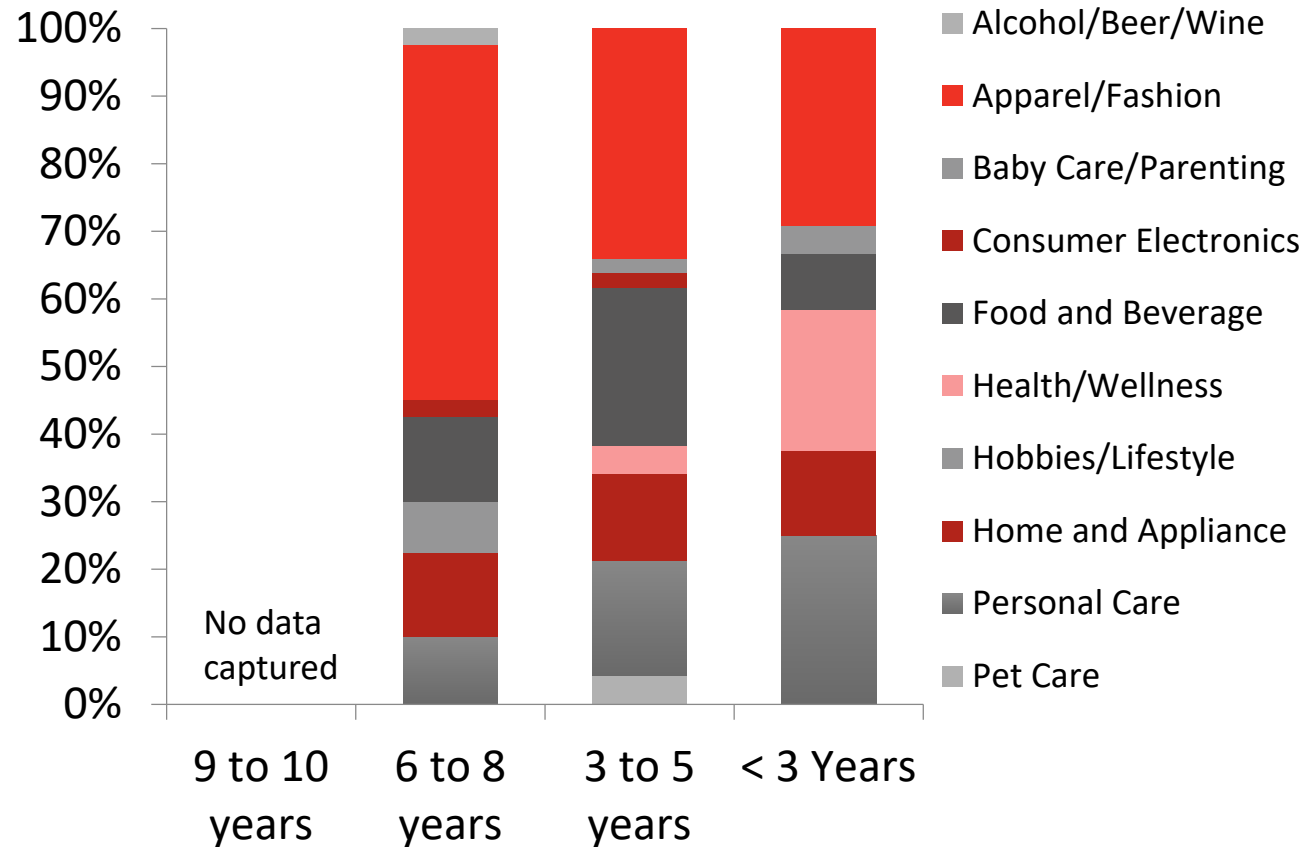


Women Founders by Category: Services

 APPAREL & FASHION	 FOOD & BEVERAGE	 HOME & APPLIANCE
<div>ANOMALIE</div> <div>POSHMARK</div> <div>WILDFANG</div>	<div>chowbus</div> <div>platejoy</div>	<div>HAVENLY</div>
 BABY CARE & PARENTING	 HEALTH & WELLNESS	 PERSONAL CARE
<div>tinkergarten</div>	<div>AURA</div> <div>classpass</div> <div>INFINITERECOVERY</div> <div>LARKR</div>	<div>core</div> <div>MAYVENN</div>
 EDUCATION	 HOBBIES & LIFESTYLE	 TRAVEL
<div>admitsee</div> <div>coursera</div> <div>ELSA</div> <div>Pear Deck</div>	<div>Grokker</div> <div>iCouch</div> <div>nütrimeddy</div> <div>obé</div> <div>shine</div>	<div>Chimani</div> <div>domicile</div> <div>eightydays</div>
<div>PSYCHARMOR Institute</div> <div>SOLOLEARN</div> <div>StudySoup</div>	<div>meetmindful</div> <div>twigdale</div>	<div>journy</div> <div>key</div> <div>SUITENESS</div> <div>ViaHero</div>

Women Founders: Category Diversification; Gaining in VC Attention

Female Founder DTCs % Categories, by Company Age Group



% of Female Founder DTCs with VC Funding

