

Winning against a dominant brand

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Abstract

The successful e-commerce-first brands competing against Amazon provide a road map for any firm going against a dominant player in any category. These brands engage in strategic jujitsu by exploiting Amazon's vulnerabilities — an impersonal/functional image, being the everything store without in-depth credibility in anything, and often having the personality of a powerful giant lacking humour or warmth. Strategies that work include developing credibility for their subcategory, a simpler choice set, a brand community, a higher purpose, a personal touch, being the feisty underdog, positioning to highlight advantages and expanding the distribution footprint by adding storefront synergies.

Keywords

underdog brands, e-commerce strategies, dominant brands

FACING A GIANT

Many, if not most, categories have one, two or occasionally three dominant players that that seem close to invincible. Against this reality, it is challenging even for innovative firms to gain a foothold and create a growth platform. Consider competing against John Deere in farm equipment, Apple/Samsung in smartphones, Logitech in computer mice and keyboards, Campbell's in canned soup, Lego in building toys, Burberry in rainwear, McDonald's in fast-food burgers, Nike in athletic footwear, Lexus/Mercedes/BMW in luxury sedans or Tesla in electric cars.

These giants all have enormous advantages, including scale economies, brand strength and visibility, distribution clout and power, huge marketing budgets and an established customer base. How do

challengers create a growth platform in that shadow? How do they neutralise the enormous assets of the market giant, or even turn those assets into a liability using some form of strategic jujitsu? A formidable task. There are many avenues to success but most involve one or both of two precepts.

First, create a new subcategory that changes what customers are buying and using as described in my book *Owning Game-Changing Subcategories*.¹ Exhibit commitment and even passion to the subcategory, which could be defined in many ways, such as by new features or uses, different ways to connect to customers or tailoring to the needs of a market segment. Make a focused and specific offering an advantage rather than a disadvantage. Be something more than an organisation that

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is after sales and profit, but rather an organisation that puts customers, innovation and quality first. Consider leading a brand community with involved customers.

Second, move beyond functionality and efficiency, the core advantage and often the driving strategy of the giant. Create a personality that could be based on being the feisty underdog, having a sense of humour, being warm and personal or having a passion for an activity. Really believe in a higher purpose. Have a social conscience that is authentic and visible.

One context in which to observe the winning strategies of challengers to an industry giant is the world of e-commerce, which contains one of the biggest elephants in today's environment — Amazon. In 1994, Amazon began as a book selling e-commerce venture with the mission to have Earth's biggest selection and be obsessed with the customer. In just over 25 years, it became the second company to be worth over a trillion dollars, capturing nearly 50 per cent of the U.S. e-commerce market and over 90 per cent in some categories such as batteries and skin care.² In 2019, it had nearly 200 million visitors to its U.S. website each month and was expanding rapidly globally.³ Its momentum has caused the closure of storefront retailers to increase year over year.

Amazon's success is due to many factors in addition to scale economies, operational excellence and a strong customer base. One was its strategic decision to focus on hyper-growth and accompanying infrastructure investment fuelled by selling investors on the logic of foregoing short-term profit and the cash flow from the Amazon Web Services (AWS) (cloud) business launched in 2006. A second is its commitment to measurement and experimentation, which allows it to leverage its data to optimise which offerings are displayed and how they are presented, priced and promoted.

A third is a stream of customer-facing 'must haves' that include a secure payment system, personalised purchase suggestions, an enormous product scope, low prices, customer reviews, 1-click and the huge game changer, Prime. Launched in 2005, Prime had over 100 million members in 2019. Amazon truly became the dominant brand.⁴

How can a firm win against such a formidable competitor?

Some Amazon competitors, such as Walmart, the Home Depot, Sephora and IKEA, are storefront-first retailers. Their e-commerce strategy draws in part upon linking those physical assets with e-commerce. Many capitalise on the 'buy online, pick up in-store' option. The Home Depot, for example, says half of its e-commerce purchases are now picked up in stores. Others encourage accessing e-commerce while in the store, especially for items that are out of stock.

The interest here, however, is the specialised digital-first e-commerce firms, sometimes called direct to consumer (D2C) companies, where there is a focus on a type of product and/or customer application led by e-commerce, where the customer orders primarily through the website even though storefronts might exist. There are a host of e-commerce-first retailers, such as clothing brands like Stitch Fix, Bonobos and Everlane; Warby Parker (eyewear); Glossier (cosmetics); Away Travel (luggage); Allbirds (shoes); Blue Apron (meal kits); Madison Reed (hair colour); Casper (mattresses); Boll & Branch (bed linens); CarMax (cars); Ally Bank (banking); Birchbox (beauty); Adore Me (lingerie); Dollar Shave Club (razors) and Etsy (crafts). In each case, the goal is to become the only relevant (or at least the most relevant) e-commerce brand in that specialised product or customer space.

The good news? It is possible to compete and win against Amazon and garner a growth platform. An amazing number of specialised digital-first brands have done just that. They have benefited, as do those in other categories facing incumbent giants, by advancing technology that creates competitive options not available only a few decades ago. There are, for example, Internet improvements, enhanced mobile capabilities, increased computer power and better software platforms.

The key factor, however, has been the willingness and ability of these e-commerce-first firms to employ the two strategic thrusts — new subcategory formation and going beyond functional benefits — and leveraging those to provide a customer relationship or customer experience that is markedly different and better.⁵ There follow eight strategies that lead to ‘must haves’ defining game-changing subcategories, strategies that follow from the two precepts of how to win facing a dominant firm.

SUBCATEGORY CREDIBILITY

Amazon is the ‘everything store’; therefore, it is an expert on nothing. A key to success then is to select a specialised product area and become the expert at least in the online world. It might be eyewear, shaving equipment, mattresses, speakers or whatever. Within that arena, the goal of your brand can be to become the most authentic and knowledgeable source of product.

Product credibility, which starts with delivering or overdelivering on the brand promise, gets more traction when the customers know how the firm is able to deliver. How is the product made or the service delivered? What is the process? Who are the employees and how are they trained? What is the story of the founder

or the motivating idea? What are the organisation values that affect its ability to deliver quality reliably?

Everlane, which started as a t-shirt firm in 2010 (with a market cap of US\$250m six years later), offers transparent pricing (you know exactly what the costs are) and ethical factories.^{6,7} On the website you can see the story of each of their dozen or so factories — why it was chosen, why it excels, pictures of the factory in operation, descriptions of the owners and so on. The system of rating factories evaluates, in particular, how the workers are treated. These stories provide credibility that could not be obtained just by making assertions.

An in-house design can convincingly provide credibility. Warby Parker, the eyewear firm, started in 2008 (and valued at US\$1.75bn ten years later) by hiring a veteran eyewear designer attracted to the opportunity to design a line from scratch. The initial line had 27 designs that were both functional and aesthetic and responsive to current style trends. Articles about Warby Parker early on often commented on the quality of styling. The fact that it, year after year, received high net promoter scores (per cent recommend less per cent not recommend) provided the ultimate compliment.⁸ The mattress brand, Casper, started in May 2014 (valued at US\$1.1bn five years later), designed its product from scratch by a team from IDEO, the innovation design firm in San Francisco. The result was a single design (that later had three versions) with unique material that was ‘outrageously comfortable’ and named by *Time* as an invention of the year in 2105.⁹

Extending the brand and therefore the subcategory into related items can reinforce credibility and elevate the perception that the organisation is one that understands the underlying functional benefit. Less than ten years after launch,

Warby Parker expanded its scope with the company's Prescription Check mobile app, which lets eligible customers acquire a new prescription for just \$40 without having to visit an eye doctor. It showed that Warby Parker is more than just designing and making frames. Casper has added, in addition to pillows and bedding, the Casper Glow lamp. The lamp gently dims as you go to sleep and does the reverse to wake you up without an alarm. Then there is the dog mattress and the map pillow. These extensions signal that Casper gets sleep.

Voice and tone also build credibility. Everyone is familiar with mattress salesmen shouting about their sale prices on television. Casper is very different. In some ads, the 'spokespeople' are adorable dogs, pigs or goats, showing how dreamy the mattress feels. And there are hour-plus videos of meditations connecting you with sleep. Even the product videos showing the difference between the three mattress versions are factual, balanced and conversational, with light humour — very different from a sales pitch from a television salesperson.

Credibility is always at the heart of a brand's ability to create a new game-changing subcategory, but it is particularly important in the e-commerce setting. The next seven strategies both support and rely on the brand's credibility.

A SIMPLER CHOICE SET

A high level of credibility with respect to a game-changing subcategory gives the brand permission to reduce the number of choices, thereby simplifying the product decision. Amazon has some 353 million products. Nearly every category has hundreds and even thousands of options, many more than a visitor could deal with. People value simplicity over complexity

and too many options do not represent simplicity.

Consider the Dollar Shave Club (DSC), launched in March 2012 (and acquired four years later by Unilever for over US\$1bn) with an offer to bypass the in-store razor blade purchase pain and inordinate expense. The DSC offer — for a \$1 a month subscription, plus a \$5 product setup of a razor handle, shaving cream and some blades, you would receive a packet of blades regularly. It was simplicity personified. By 2019, the one razor had been replaced with three options of razor/blades that were labeled 'Humble', '4X' and 'Executive' and were priced at US\$3, US\$6 and US\$9, respectively, per month. At Amazon there are 12,000 shaving options — 12,000 options. Really. No joke. The DSC also offers a toothbrush option in white or black while Amazon offers 8,000 toothbrush options. Are so many options a 'must have' or a 'give me a break' feature?

The good news is that Amazon will have the colour, style, type and size you want. The bad news is you screen and choose. To a population that is so tired of complexity and choice the Amazon big selection is not always attractive. Nearly all of the e-commerce successes have a limited selection that has been chosen to be the best for you. Their promise is that if you spent hours researching choices, you would not end up with anything meaningfully better.

Dozens of studies have demonstrated the value of simplicity. One study employed questions before and after a purchase of a wide variety of products addressed to each of 7,000 consumers in three countries. The single biggest driver of 'stickiness' was 'decision simplicity'.¹⁰ The psychologist Barry Schwartz shows in his book *The Paradox of Choice*, the more complex a decision becomes, the more

likely it is to experience angst, indecision, regret and lower satisfaction with the purchase process and the products itself.¹¹ Too much choice can be overwhelming and even paralyzing.

Simplicity can go beyond the reduction of the choice set. It can also be influenced by the way choice information is presented and organised. Side by side comparisons of competitor offerings that are provided by some brands in the automobile and insurance categories can be helpful. What is not helpful is too much information that is not relevant, displayed in a confused way.

A SHARED-INTEREST BRAND COMMUNITY

Amazon is very functional and has limited capacity to share a customer passion towards a product or activity. A specialised e-commerce-first brand with a website that involves its visitors is well suited to nurture an online shared-interest brand community that can drive a relationship. There is a 'found a home' or even a 'found a family' moment. That connection will contribute to the brand's credibility as well. People are unlikely to challenge the credibility of a brand that has a common interest. Consider Etsy.

Etsy was founded in 2005 as a place that true craftspeople could go and sell their products. At Amazon, they felt lost and out of place as did potential buyers. As Etsy developed its model, a community of buyers coalesced with a shared interest in the intriguing, high-quality craft activity; the human connection with craftspeople and the 'hang out' pleasure they received. Even more impressive, however, was the community of sellers.

For sellers, the Etsy community contains creative, committed craftspeople who want to turn their passion into a business.

The firm supports with an easy-to-use software to create websites; information and suggestions about materials, processes and designs complete with role models and a way to connect to fellow sellers. Its website also has a blog containing a 'featured shop' series where an in-depth profile of an artisan seller is presented. One, for example, told the story of Belaya Hvoyra, a line of handmade wooden utensils made by Kirill Babii, a Ukraine-based woodworker who on his way home from his university found a sycamore branch that inspired him to rebirth dead wood.¹² His work evolved into doing cutting boards, plates and modular dining utensils with a spoon being the most popular. These stories and others like it are a way to personalise the community.

In addition to the Etsy efforts, a seller community website provides a compilation of seller advice and aids about running their business. A 'handbook section' contains information about all aspects of making an Etsy business successful. The forum section provides a vehicle to discuss area of interest, such as branding or marketing. Still another section allows you to create or join an active team discussion and explore cooperation with other sellers and compare ideas about anything affecting your business, such as how to grow, how to promote, how to work with metal, shameless advertising and global marketing. In 2019 there were over 10,000 teams worldwide.¹³

Etsy has created and owned a subcategory that channels energy from sellers and buyers that truly believe and live the mission of Etsy. Prophet, a digital transformation and brand strategy firm, does an annual brand study of nearly 300 brands. On the ability of a brand to inspire, Etsy placed third after only Pinterest and Food Network in 2019. A remarkable and enviable feat.

In 2015, ten years after Etsy launched, Amazon Handmade was introduced with the seller option of using Fulfillment by Amazon, which was in some ways, the ultimate compliment. Etsy, however, still showed a year over year growth rate 2015–2019 that exceeded 25 per cent and saw its market cap grow from US\$1.8bn to US\$8.1bn, which shows that it was not significantly affected by the Amazon attempt to copy.^{14,15} Amazon Handmade's liabilities include, in addition to a commoditisation image and the lack of a community, the fact that a seller faced the lack of data control, higher fees and the inability to add promotional material in or on shipping boxes.

A HIGHER PURPOSE

Amazon dominates with low prices, wide selection, reliability and easy-to-use interface all functional benefits. Its priority is on growing sales through being customer centric. However, people today, especially Millennials, desire a relationship with an organisation with a higher purpose they respect and admire. They want to connect with a firm that is visibly doing something for people, the community and the planet that is over and beyond just making money.

An offering and its functional benefit can also provide a basis for a higher purpose. Etsy has a higher purpose — to foster creative craft making powered by people and the lifestyle, values and community that goes along with it. Casper is the sleep company (not a mattress company) with a mission to awaken the potential of a well-rested world. There needs to be substance behind the higher purpose to buttress credibility. Casper, for example, communicates research about sleep and, as described earlier, develops products such as the Casper Glow and sleep aides such as a meditation video. It is hard to imagine Amazon being concerned with sleep quality.

A social or environmental higher purpose often provides a more powerful source of pride and inspiration. A growing and significant portion of the marketplace is sensitive to the responsibility and ability of firms to address social and environmental problems and make a difference. Increasingly, firms that are visible and effective at creating a social or environmental mission and supporting programmes are rewarded by customers and even the stock market

The online Ally Bank has a mission to help people achieve their financial dream by expanding access to economic mobility. Financial education programmes are part of the effort — tens of thousands of kids and families have learned money habits with Ally children's books and adults have accessed the free Wallet Wise course on financial basics. Employees visit classrooms and help students build websites. Other community efforts are directed at helping people develop the skills and resources to move up.

One way to provide substance behind a social or environmental higher purpose is to have a visible way to give products relevant to a population with a need. Warby Parker wants to address the reality that 2.5 billion people need glasses but lack access, one-fourth are so impaired that they cannot effectively learn or work. Its programme to 'Buy a Pair, Give a Pair' has resulted in over five million pairs of glasses being distributed during their first seven years. Prophet, the brand consulting company, devotes one day each year to provide advice to small not-for-profits. Casper gives sheets and mattresses to those in need.

A PERSONAL TOUCH

Amazon is big, efficient and the very picture of being mechanical and impersonal

with robots operating not only the warehouses but also customer interaction. The website does not reveal any way to communicate with a real person; so, providing a link to a person who is informed and empowered about a product arena creates a feeling that someone cares and you do not have to be alone and frustrated. It puts Amazon at a disadvantage.

When you enter a retailer, it is nice to have a real person interact with you. Warby Parker has such a person on call, only 6 seconds away. Just knowing there is a call number, even if you never use it, is comforting. Casper's 'chat with a real human' button provides a link that reassures.

The ultimate is to include a human being into the offering. Stich Fix, an e-commerce clothing site, provides a personal stylist who can select clothing that would work for you. You then can have several of the choices shipped to your door from which you can buy whatever you like and send the rest back. All shipping is free, and no subscription is required. The Stich Fix customer can also find general stylist advice and commentary on the site. Adore Me, the brand with an e-commerce site that sells lingerie that competes with Victoria's Secret, offers 'VIP' subscriptions that provide a new set of lingerie every four weeks, reflecting Adore Me's ability to be fashion-trend forward. That requires a person with knowledge of not only the customer but the fashion-forward choices, not the style or even within the capability of Amazon.

A personal touch can go beyond an interaction with a person. Some brands have sent out personal notes to celebrate reaching a loyalty level or being a good customer. Other brands, such as Etsy, have membership where members get access to products, promotions or information not available to others. It is a way to make someone feel connected and valued.

BE THE FEISTY UNDERDOG

Being the feisty underdog with respect to two targets, the storefront chains and Amazon, can be powerful. DSC, for example, is an underdog to Gillette, which has made buying difficult for a long time and seems unwilling or unable to change. Although the storefront chains selling big brands like Gillette may be the prime target, DSC is also an underdog to Amazon, which for some has a personality of an all-powerful giant that lacks a personal touch and never has fun.

People love the underdog story and often cheer for the brand that goes up against big, established players that are serious and even pompous. The underdog brand, the cute little dog nipping at the bored huge bulldog, gets permission to attract attention by being funky and even outrageous and, most importantly, to be humorous.

Humour is a particularly powerful tool and being able to access it can be a game changer. An appealing personality trait, humour helps most relationships because it is just more fun to be with an entity that makes you laugh. Particularly useful for a brand attempting to break into e-commerce with an innovative disruptive offering, it not only generates likeability, which is transferred to the brand, but it also attracts attention and distracts from counterarguing. Getting a message to go viral because its humour spurs sharing has made the difference for many new brands.

DSC, for example, uses humour and quirky subject matter throughout its interaction with customers. At launch, it distributed an irreverent video that introduced the founder and the DSC concept to reduce the frustration and expense of buying razor blades in an irrelevant and wildly humorous but still authentic way. The video with a signature line 'It's not good it's f.. .kng good' went viral, crashed

the site, prompting 12,000 orders in a two-day period and, by 2019, had received over 26 million views. Then there is the magazine insert in DSC monthly shipments, 'The Bathroom Minutes', that provides a set of single-page notes that are offbeat interesting or humorous. The website contains a lifestyle and culture magazine that covers sex, relationships, health, money and more from a 'male' point of view that is always intriguing and often humorous. Then after introducing 'One Wipe Charlie', a wiping tissue with a link to colon cancer, DSC issued a video 'Let's talk about #2'. The humor for DSC not only helps create a personality and relationship but without question aids communication.

POSITION TO HIGHLIGHT ADVANTAGES

Sometimes a competitive advantage gets buried when the brand is positioned against the dominant brand and its category. One option is to recreate space between the dominant brand and the challenger brand so that its advantage gets highlighted and is the focus when customers make purchase decisions.

A classic example is DiGiorno Pizza, which was introduced in 1995 as a frozen pizza with a fresh-frozen crust, as opposed to a frozen precooked crust, which resulted in superior taste and texture. Rather than positioning their offering as a subcategory of frozen pizza, it positioned DiGiorno as a subcategory of delivery pizza because it had comparable quality but was simply more convenient and much less expensive. With a long-running tagline "It's not delivery. It's DiGiorno" the brand charged from USD \$125 million to over USD \$200 million within a few years and to over USD \$1 billion by 2013.¹⁶ Half of the new sales coming from people new to frozen pizza.¹⁷

Another example is DSC, which started and remains anchored on having a breathtakingly low razor blade price as compared with Gillette and other national brands being sold through local retailers. DSC shouted low price and found ways to communicate that low price credibly and memorably. The reference price was not Amazon in part because the Amazon price is dynamic, changing daily and sometimes hourly, so any price comparison with Amazon would be messy at best.

ADD STOREFRONT SYNERGIES

The new entry can expand the offering or the way it accesses the market. The result can be a more attractive purchase or use experience.

Some Amazon competitor successes created 'must haves' by expanding the distribution footprint. Amazon is really committed to e-commerce. It does have a token effort with small book stores, a convenience chain and the Whole Foods Purchase, but with respect to its total line scope and its value proposition, Amazon has limited ability to go into the streets with specialised offerings.

Amazon certainly could not open mattress stores; however, Casper Sleep can and does open stores to showcase its mattresses — after five years some 20 stores were in place and many more were planned. In addition, customers could try out Casper mattresses at Nordstrom, UNTUCKit (the store with shirts that are not tucked in) had four dozen stores only five years after launch. The lingerie start-up, Adore Me, started an aggressive store development programme in 2019. Birchbox, a beauty e-commerce brand, opened shops in Walgreens. In each case, these stores add credibility and the option to try out the product.

The result is a brand experience that is broader than that of an e-commerce-only brand. The storefront exposure builds and enhances a brand. It allows the customer to touch, feel and try plus get instant gratification by taking it home. There are also economic reasons why the move makes sense:

- It is a way to leverage the brand strength, the core customer base and the buzz from the e-commerce site. A store site has a huge head start over one without an established e-commerce presence.
- The storefront exposure builds and enhances a brand. It can tell a brand story more vividly and consistently than on a website.
- Store space is plentiful and relatively inexpensive because of overbuilt retail, the Amazon-driven closures, and the damage to retail from the COVID-19 virus.

CHALLENGES FOR ANY BRAND FACING A DOMINANT PLAYER

There are challenges that a brand, such as a prospective e-commerce-first brand, facing a dominant player or a pair of dominant players needs to address.

First, find or develop a subcategory. Sometimes, however, the opportunity is obvious, such as when a confusing assortment of razor blades was sold behind a locked display at a high price. More often, however, there needs to be depth of knowledge of the market and emerging technology plus a flash of insight.

Second, develop credibility supported by substance not only by delivering consistently against the promise but also by explaining why your brand can deliver quality reliably and what it is about your organisation that earns trust. Deal with the reasons 'not to buy', such as shipping costs and 'try it' concerns.

Third, get attention with communication that breaks through because it is humorous or otherwise exceptionally interesting. Everlane got a start with an infographic of its t-shirt cost broken down into six stages, intriguing enough to garner 17,000 notes on Tumblr and that got them off the ground.¹⁸ Recall the video for DSC that went viral because of its humor.

Four, create a relationship link with customers that goes beyond functional benefits. It can involve whimsical humor as in DSC, a higher purpose as in Warby Parker, a transparent brand vision such as Everlane's or a brand community like Esty's, but it must connect.

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