ODE

Sustainable fashion. Redefined.

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EXECUTIVE SUMMARY

Through insight, analysis and evaluation of the global and sustainable fashion markets, this report introduces a new business opportunity, Ode, an e-commerce marketplace of fashion-forward, independent brands that produce clothing made-to-order.

Ode is situated in the sub-sector of **alternative commerce business models** which is projected to hold up to **30% market share by 2030** (Biondi *et al.*, 2020:6). A healthy wider market is further evidenced by the global fashion industry being worth £1.4tn and forecast to grow by £222bn by 2027 (Euromonitor Passports, 2022c). Furthermore, between 2017 and 2022, the sustainable fashion market had a CAGR of 6.5% and is anticipated to be worth almost £7bn in 2027 (The Business Research Company, 2023).

This report finds that impacts of inflation and climate change are causing consumers to be more **intentional spenders**, seeking out transparent, purpose-led brands and “climate-friendly consumption choices” (Young, 2021). These consumers are just as community-focused as they are conscious, with Gen Z **gravitating to niche, independent brands** that offer an element of connection (Shahid, 2022). Ode’s curation of independent, made-to-order brands, alongside our community platform, Geneva, addresses our target consumer’s needs for **sustainability, individuality and community**.

This new business opportunity was validated through an analysis of the current competitive landscape which currently consists of marketplaces that are either independent or sustainable. The former prioritizing fashion-forward designs and lacking sustainable foundations and the latter dictated by sustainability values. Ode addresses the **gap in the market for a marketplace that is both fashion-driven and built on the concept of conscious consumption**.

Primary and secondary research, alongside aspirational brand analysis, illustrated the importance of branding when targeting Gen Z and younger Millennials. Factors such as individuality, a unique tone-of-voice and a focus on community were highlighted. Ode’s brand identity has been carefully curated to reflect these elements and effectively reach our target consumer.

This research strongly suggests a notable gap for Ode: a made-to-order, fashion-forward marketplace with an uncompromising relationship between style and sustainability.

GLOSSARY

GLOSSARY

Words according to Ode

Fashion-forward – boundary-pushing, experimental, fun, not confined by traditional concept of eco fashion

Fashion-driven – not dictated by either trends or sustainability, considers trends without being trend-driven, loves to present in unique and experimental ways

Eco – prioritizes sustainability in the very old-school meaning of the word i.e. hemp, linen, shapeless silhouettes, neutrals, green branding, heavily informative marketing

Sustainability – considered consumption characterized by thoughtfulness and intention

01 MARKET INTELLIGENCE

1.1 MARKET OVERVIEW

MARKET INTELLIGENCE | MARKET OVERVIEW

GLOBAL FASHION

£1.4tn

Current global market value of £1.4tn (2022a).

3.3%

Predicted YoY growth of 3.3% between 22/23 (2022b).

+ £222.7bn

Forecast to grow by £222.7bn betwen 2022 and 2027 (2022c).

2.4%

Predicted CAGR growth from 2022 to 2027 is 2.4% (2022a).

(Euromonitor Passport)

SUSTAINABLE FASHION

£6.7bn

Current global market value of £6.7bn

1%

Predicted YoY growth of 1% between 22/23

+ £2.9mn

Forecast to grow by £2.9mn betwen 2022 and 2027

6.5%

Predicted CAGR growth between 2017 and 2022 is 6.5%

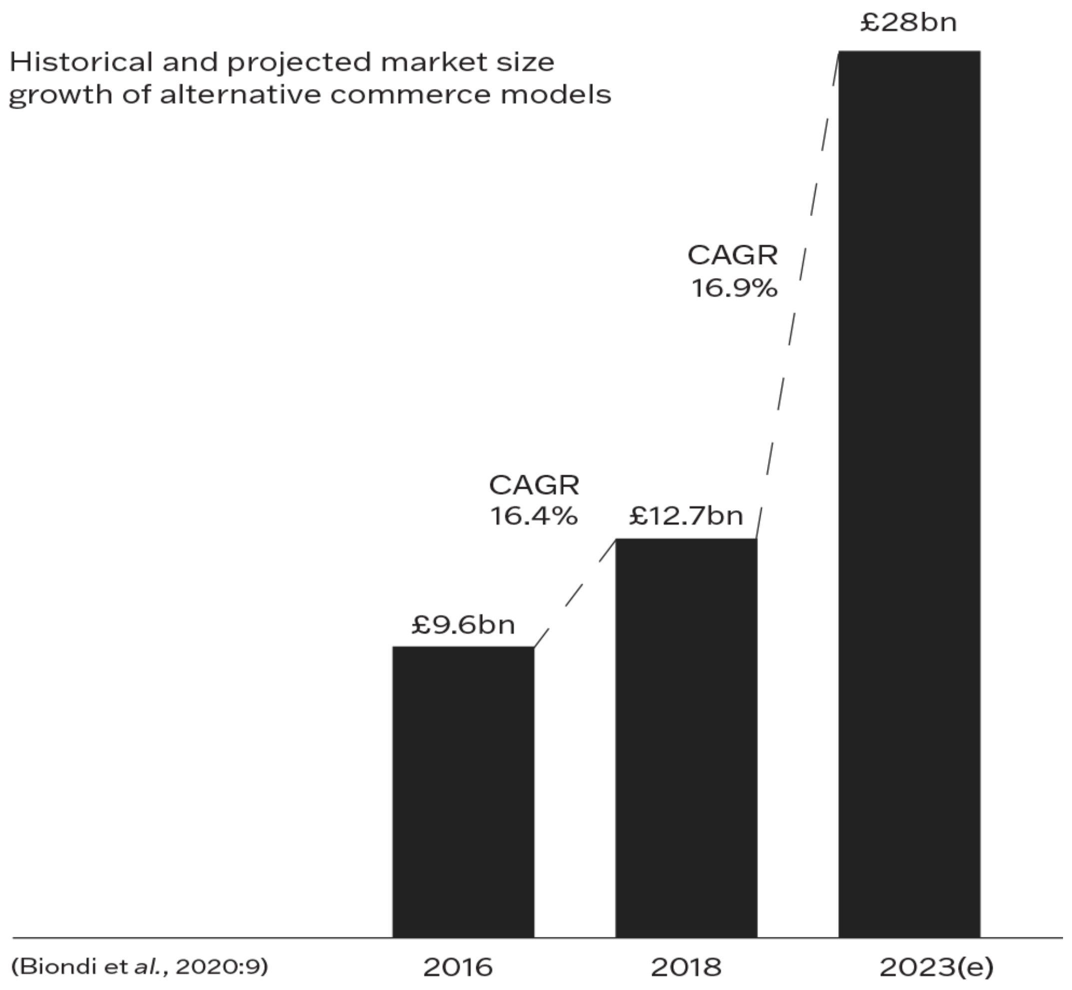
(The Business Research Company, 2023)

ALTERNATIVE APPAREL COMMERCE MODELS

In their very relevant research on emerging apparel business models, researchers at Deloitte (Biondi *et al.*) discovered 50% of survey respondents would buy from companies with sustainable values (2020:6).

They estimated alternative commerce models to have a 16.9% CAGR by 2023, translating to 9% market share with potential to grow to up to 30% by 2030 and continue to increase exponentially (2020:6).

Historical and projected market size growth of alternative commerce models



(Biondi *et al.*, 2020:9)

MARKET INTELLIGENCE | FACTORS AFFECTING THE MARKET

1.2 FACTORS AFFECTING THE MARKET

MACRO

ONLINE PURCHASES

The online fashion market has seen an 11% increase in spend from pre-pandemic (Mintel, 2022b)

CLIMATE CHANGE

Fashion overproduction and overconsumption accounts for 3% to 5% of global emissions (BoF & McKinsey, 2022:82a).

INFLATION

Inflationary pressures will impact fashion purchases in 2023, with garment CPI at 8.7% in Q1 2022 (Mintel, 2022b).

MICRO

TRANSPARENCY

24% showed interest in retailers being more transparent about supply chains (Mintel, 2022a)

MARKETPLACES

Over 25% of Gen Zs have made fashion purchases from digital marketplaces in the last year (Mintel, 2022b).

1.3 CONSUMER TRENDS

RETAIL

CLIMATE COMPLEXITY

Consumers want “climate-friendly consumption choices and guidance” on responsible purchasing from companies (Young, 2021).

INTENTIONAL SPENDING

Consumers are valuing brands with purpose who contribute to “issues of equality, inclusivity and sustainability” (Moriarty, 2022).

VALUE CHAIN

“61% of global shoppers [opt] to buy from [] retailers that have a purpose beyond simply selling products and services” (Wahi & Medeiros, 2023).

MARKETING

SELLING SIMPLICITY

Brands should debrand by "[scaling] back and [refocusing] their visual identities" to avoid overstimulating the consumer (Napoli *et al.*, 2023).

GREENVERTISING

Trust in businesses is declining. Brands should be transparent about sustainability claims by simplifying communication of commitments (Napoli, 2022).

BRAND CITIZENSHIP

Brands must be public advocates and "integrate consumer support into [] messaging [] to convert young shoppers" (Napoli, 2022).

LIFESTYLE

COMBATING OVERSTIMULATION

Digital natives are struggling to keep up online and remain physically present. This is not helped by fast-moving trends and brands aggressively producing and marketing clothes (Tan *et al.*, 2023).

FINANCIAL NIHILISM

45% of young consumers are refusing to let economic conditions constrain their spending. Brands should guide this consumer with messaging of intentional consumption (Tan *et al.*, 2023).

KEY FINDINGS

The global and sustainable fashion markets are expected to see 3.3% (Euromonitor Passport, 2022c) and 1% (The Business Research Company, 2023) growth respectively in the next four years. **Alternative commerce models** are predicted to hold up to **30% market share by 2030**.

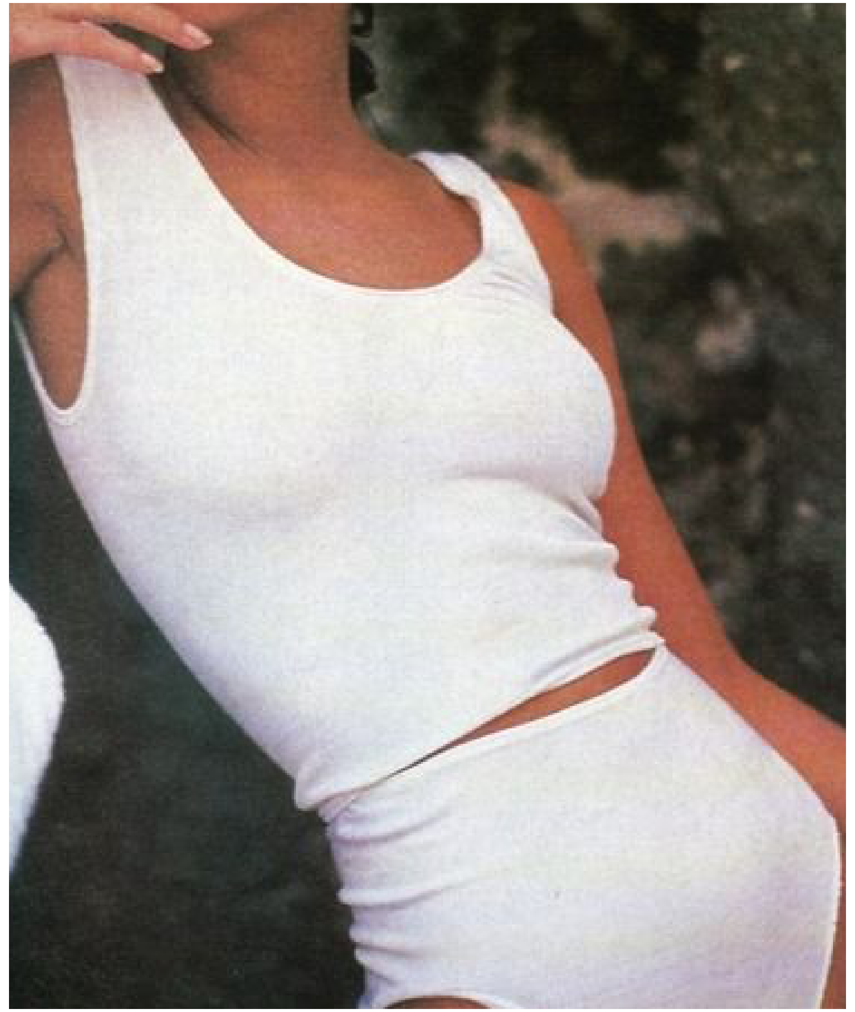
Effects of inflation and climate change are causing consumers to seek guidance on responsible consumption. They are prioritising **intentional spending** and **purpose-led, transparent brands**.

As a made-to-order, fashion-forward marketplace, Ode will capitalise on the **growing alternative commerce market.** We will address consumer needs with simplified sustainable messaging and our community platform, Geneva - providing a space of like-minded consumers.

02 TARGET MARKET

2.1 DEMOGRAPHIC & ETHNOGRAPHIC CHANGES

TARGET MARKET | DEMOGRAPHIC & ETHNOGRAPHIC CHANGES



GEN Z

Making up 40% of consumers globally, Gen Z's total income is estimated to reach over £27 trillion by 2031. Sustainability is their top priority with 62% of Gen Z preferring to purchase from sustainable brands and willing to pay more for ethical products (Tan *et al.*, 2023).

Gen Z are showing an aversion to popular brands and luxury labels gravitating to niche brands that allow them to feel a connection to their purchases (Shahid, 2022).

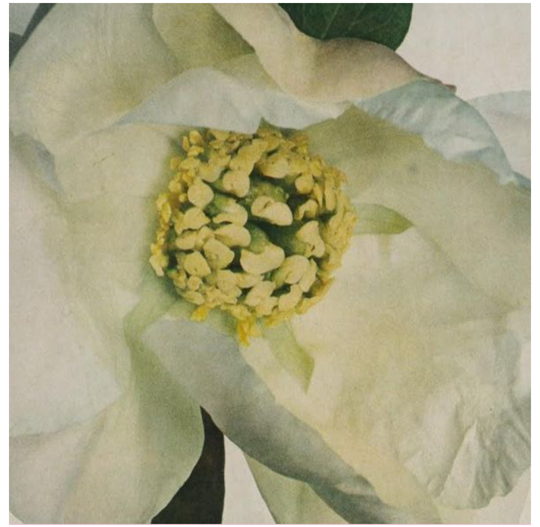
TARGET MARKET | DEMOGRAPHIC & ETHNOGRAPHIC CHANGES

MILLENNIALS

Millennials accounted for 23% of the global population in 2021 (Neufeld, 2021). Often overlooked as the sandwich generation, they experienced a wealth boom in the pandemic, nearly doubling in the US (Tanzi, 2021).

Above other generations, they prioritise sustainable and environmentally responsible purchases (Haller *et al.*, 2020:6) and conduct the most extensive research prior to purchase (Haller *et al.*, 2020:7).

2.2 ARCHETYPES



THE CONNECTORS

"For The Connectors, cost-per-wear, sustainability and authentication details on labels and hang-tags are value drivers that result in sales and social shares" (Bell, 2022).

PROSUMERS

"Gen Z is embodying a new type of [] part-producer, part-consumer, who studies up on their favourite brands and posts about them online as a quasi-spokesperson" (Saggese, 2022). (Moriarty, 2022).

ASCETIC LUXURIANS

This consumer has an "appreciation for highly crafted and artistically resonant objects as signifiers of distinction, discernment and choice. [They] invest in labels that they value for ethical or artistic integrity" (Maciejowska and Smith, 2015).

2.3 CONSUMER PROFILES

YLVA SOBAKKEN

23 | Gen Z | Masters Student

Archetype - Prosumer Researcher/Connector

Psychographic Profile - Early Majority

Minimalist Scandi style | Conscious consumer | Spends on independent brands and investment pieces

“Learning about [fashion] has shaped my values when it comes to purchasing clothing. I would never purchase from a brand that doesn’t align with my personal beliefs and values.”

(see Appendix 1)

ENGLA LOFSTROM

21 | Gen Z | Influencer

Archetype - Prosumer Researcher/Ascetic Luxurian

Psychographic Profile - Innovator

Experimental style | Prioritizes re-styling over buying new | Spends on independent brands, unique designer and vintage

TARGET MARKET | CONSUMER PROFILES

COURTNEY HEARY

29 | Millennial | Marketing Executive

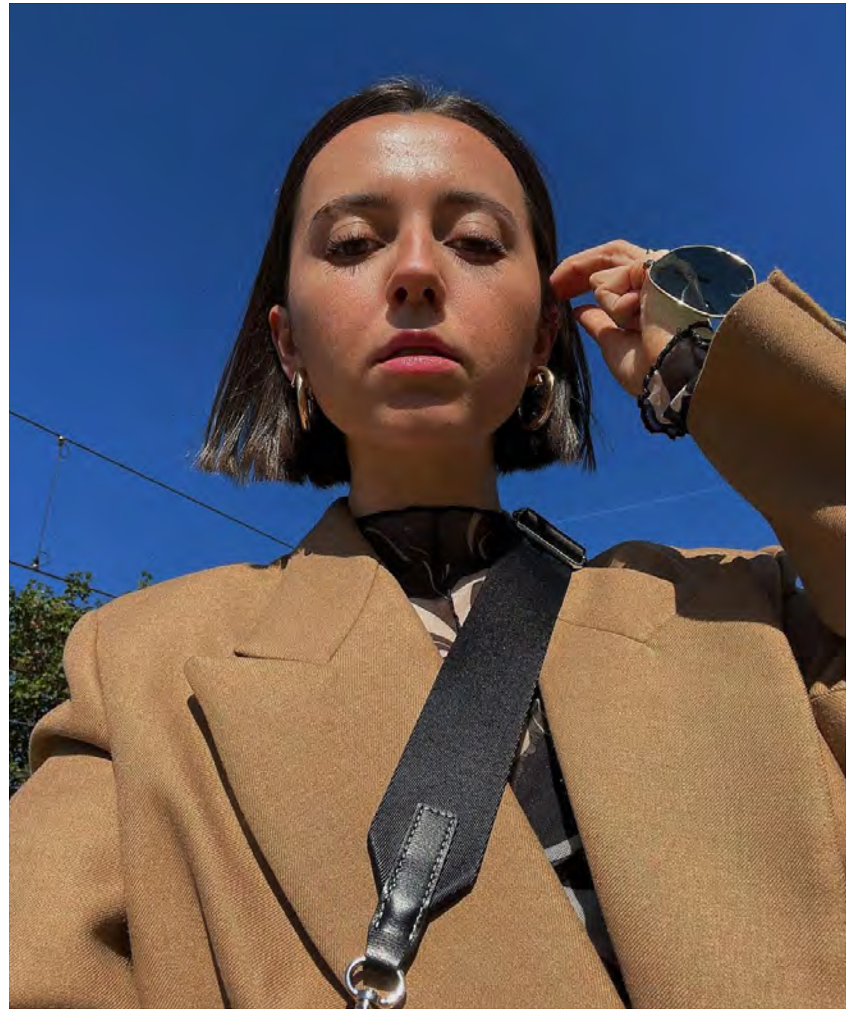
Archetype - Connector

Psychographic Profile - Late Majority

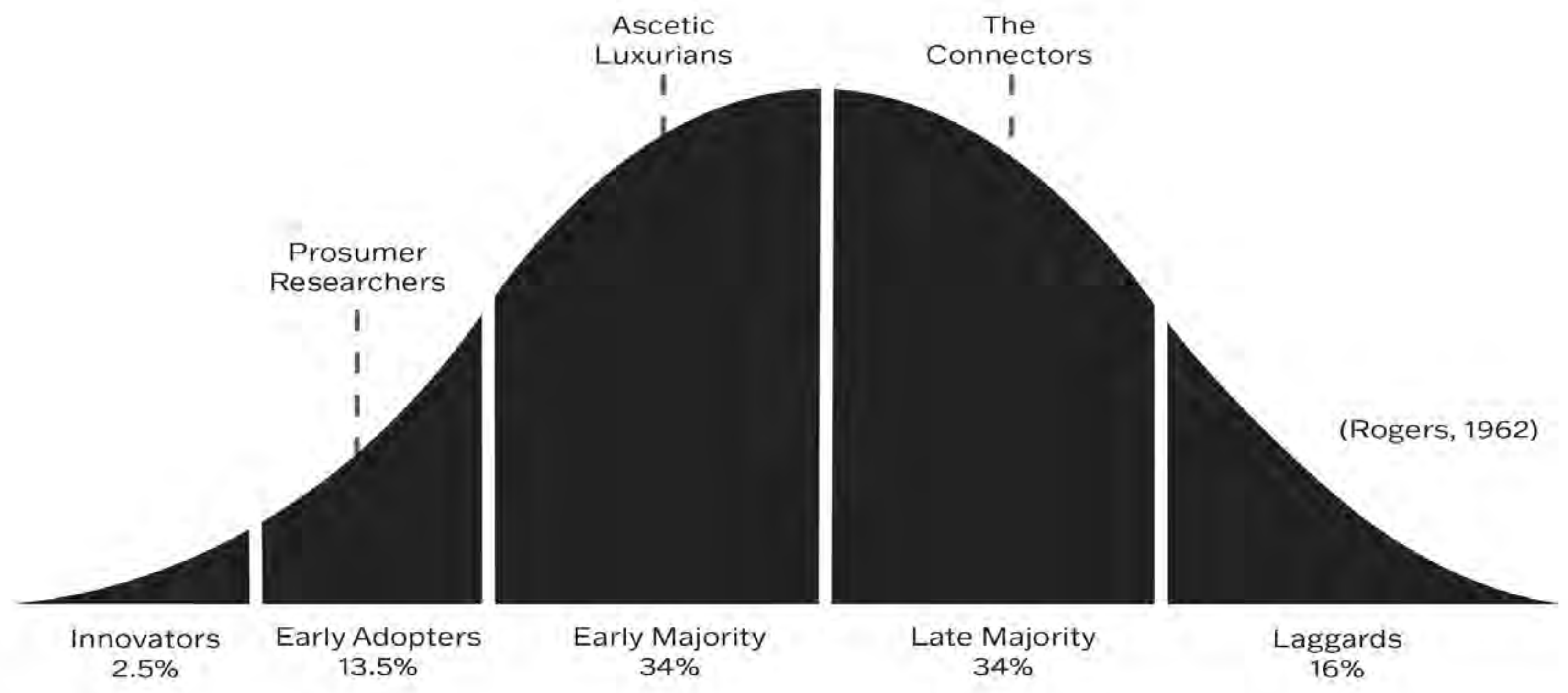
Creative style | Thoughtful consumer | Spends on high-quality wardrobe staples

“As a conscious shopper, there is an intentional and layered decision-making process behind every purchase I make.”

(see Appendix 2)



2.4 PSYCHOGRAPHIC PROFILE



Considering Ode's alternative approach to fashion consumption and emphasis on unique, independent brands, trendsetters and sustainable consumers will be our initial target consumer. These early adopters are **Prosumer Researchers** - prioritising notable, sustainable brands and inclined to brand advocacy.

Ascetic Luxurians are early majority as they appreciate an artistic, alternative approach to fashion but are less predictable in speed to adopt.

Connectors are late majority with a highly considered and slower path to purchase.

TARGET MARKET | KEY FINDINGS

KEY FINDINGS

Gen Z and Millennials account for a significant portion of the population and hold considerable shared wealth. They are increasingly prioritising **considered consumption**, with Gen Z, in particular, gravitating to **niche brands** that offer an element of **connection**.

Our target market are Prosumer Researchers and Ascetic Luxurians, both of whom **advocate for notable brands** and appreciate an **alternative approach to fashion**.

Ode's curation of independent, made-to-order brands meets both generations' shared prioritisation of sustainability and Gen Z's inclination to unique brands. Our community platform, Geneva, provides an opportunity for connection with our brands and like-minded consumers.

03 PRIMARY INSIGHT

3.1 INTERVIEWS

CARA BENDON

How important is strong branding to resonate with Gen Z?

Gen Z is a generation whose discourse is playful, non-judgmental, boundary-questioning and knowing, so it is unsurprising that they connect most with brands with identities that reflect these attributes.

Do you think trendy branding and sustainable ideals can authentically co-exist within a fashion brand?

Absolutely. Gen Z consumers understand greenwashing and therefore understand that a brand's sustainability comes down to their actions and commitments, not a choice of 'earthy colour palettes or organic shapes and fonts. The reimagining of eco-friendly is something that has been happening over the last 10-15 years, but it is being evolved further with this generation of youth consumers.

(see Appendix 4)

FRAN SHELDON

How can sustainable fashion become a viable alternative to fast fashion for Gen Z consumers?

The business models that best mimic fast-fashion will show greater transition from fast fashion to alternative models, the greatest impact in terms of social and environmental good will come from the business models that encourage slowness, wellbeing, and individuality to counter the price, convenience and conformity drivers.

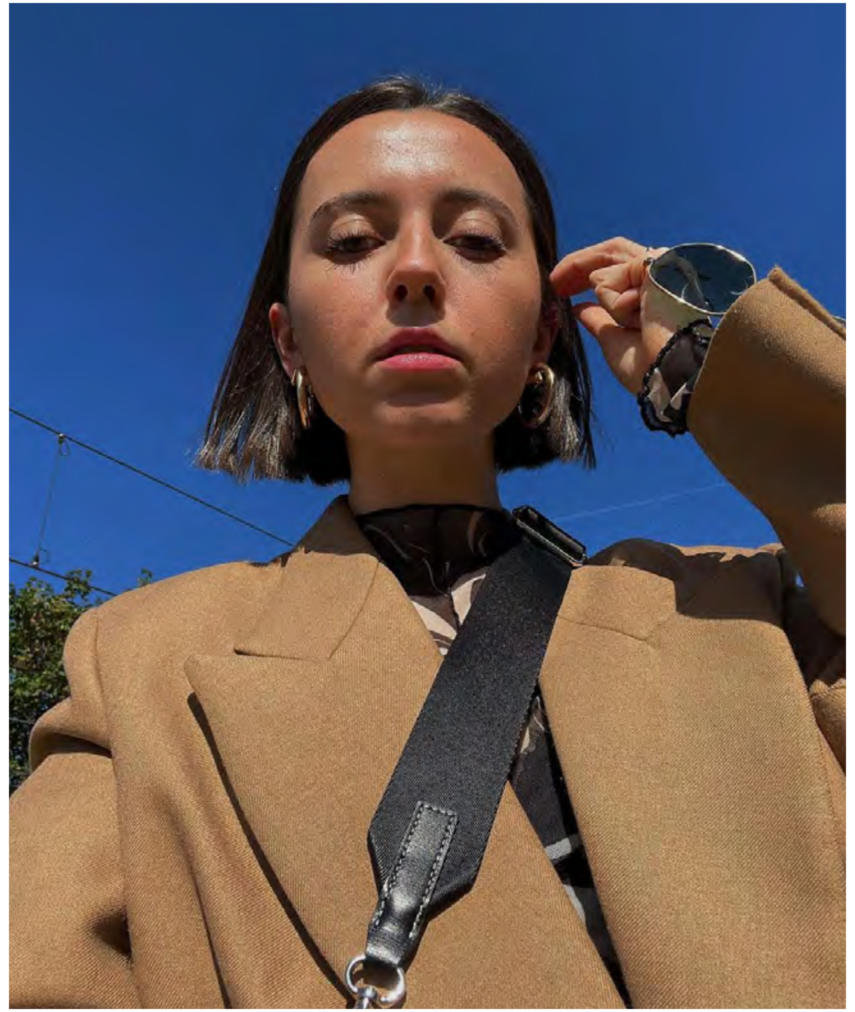
(see Appendix 3)

YLVA SOBAKKEN

What are your priorities when you buy a new piece of clothing?

"You want to be clued up, up-to-date and fashionable. Following trends doesn't mean that you're a villain, you just have to be conscious on which trends you want to follow and how can you follow trends in a way that aligns with your personal values."

(see Appendix 1)



COURTNEY HEARY

What aspects draw you in [when shopping with a brand or marketplace]?

An inviting, user-friendly website with a personal, chill tone-of-voice that balances out price point. Founder-focused with strong emphasis on community management.

(see Appendix 2)

KEY FINDINGS

Industry interviews illustrate younger generations' (especially Gen Z) nuanced relationship with sustainable fashion. They understand the importance of **action over words**, appreciate **honesty and transparency** and respond to **confident, fun branding.**

Alternative business models will reach these younger generations by encouraging slowness and emphasising individuality as a method of countering price and convenience of fast fashion options.

Potential consumer interviews indicated the importance of storytelling and tone-of-voice and showed an appetite for **interacting with trends in a way that aligns with sustainable values.**

Ode will take this insight into account with a colloquial tone-of-voice, a curation of independent brands that advocate individuality, aesthetic branding and transparent communication of our sustainability journey.

04 COMPETITIVE LANDSCAPE

4.1 COMPETITOR RESEARCH AND ANALYSIS

COMPETITIVE LANDSCAPE | COMPETITOR RESEARCH AND ANALYSIS

From extensive secondary research, Ode does not appear to have direct competitors so two relevant categories of indirect competitors were explored to identify the scope of the competitive landscape – marketplaces of independent fashion brands and marketplaces of sustainable fashion brands.

LISA SAYS GAH

Californian-based, selling independent brands and own-brand. Eclectic, maximalist brand identity with an angle of considered consumption.

JOAN

London-based, selling contemporary, sustainable womenswear. Brand identity is curated for minimalistic, fashion-forward “JOAN girl” (JOAN, 2023).

THE NORAH STORE

Manchester-based, selling independent fashion and lifestyle brands. Not solely sustainable but a tone of considered consumption.

OURCOMMONPLACE

London-based, selling ethical fashion and lifestyle brands. Brand identity built around conscious consumerism and sustainable values.

STAIY

Berlin-based, selling sustainable European fashion and lifestyle brands. Platform for emerging, ethical brands to educate and empower everyday consumers.

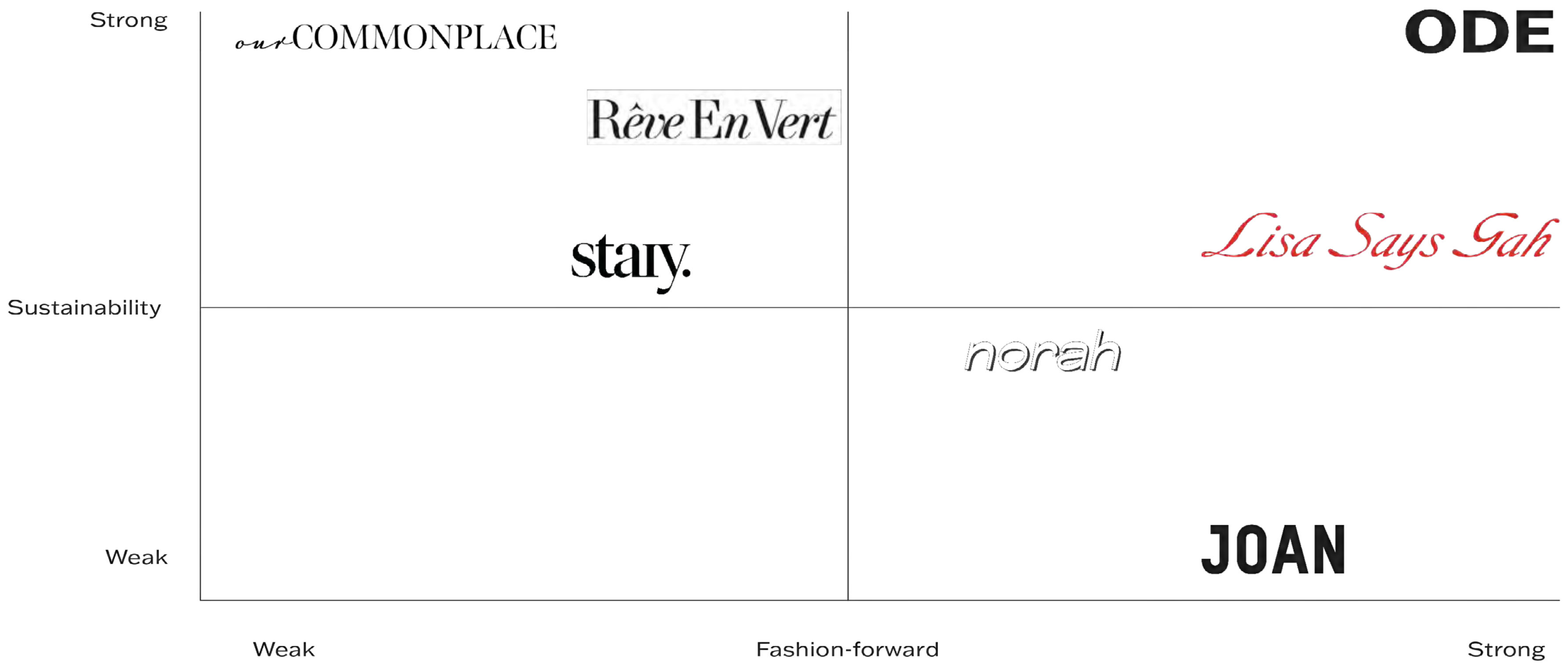
REVE EN VERT

London-based, selling sustainable fashion and lifestyle brands. Reshaping consumption by not “[sacrificing] style for ethics” (Rêve En Vert, s.d.)

This strategic group analysis (Hunt, 1972) maps out key indirect competitors to establish a thorough understanding of the current competitive landscape. The sustainable e-commerce market is populated with heavily eco-focused marketplaces. The independent e-commerce sector focuses on fashion-forward branding and product but doesn't equally prioritise sustainability.

Alongside market research and trend drivers, this analysis identifies a gap for a sustainable marketplace with a fashion-forward approach that caters to young, fashion-driven consumers.

COMPETITIVE LANDSCAPE | COMPETITOR RESEARCH AND ANALYSIS | STRATEGIC GROUP ANALYSIS



4.2 ASPIRATIONAL BRANDS

"Brands such as Ganni, Pangaia and Reformation show that sustainability doesn't have a set look – it can be minimal, sporty, romantic or glamourous...but their brands all have a clear personality, and brand personality is of great importance in connecting with young, fashion-forward consumers."
Cara Bendon (see Appendix 4)

Ode aims to resonate with Gen Z and Millennials with an identity representative of a brand rather than a marketplace. Aspirational 'cult' or 'It Girl' brands have been selected based on resonance with our fashion-driven target market.

GANNI

STRENGTHS	Identifiable branding, strong consumer base united with Instagram hashtag #GanniGirls, brand consistency across channels, affordable yet aspirational price point
WEAKNESSES	Reliance on Instagram as sole social media channel, limited brand awareness outside Europe
OPPORTUNITIES	Resale initiative, community platform for likeminded consumers
THREATS	Brands with stronger social media presence attracting Gen Z attention

REFORMATION

Relatable tone-of-voice, playful brand identity, sustainable products and transparent processes (Marci, 2019)	**STRENGTHS**
High price point could exclude younger Gen Z with less disposable income	**WEAKNESSES**
Entry level product, resale service, community platform for likeminded consumers	**OPPORTUNITIES**
Brands imitating strategy at lower price points	**THREATS**

KEY FINDINGS

Ganni and Reformation have unique brand personas but both target the ‘It Girl’ through **fashion-driven designs**, a **relatable tone-of-voice** and **community-focused** marketing methods. All of this is backed with **clearly communicated and actioned sustainability objectives**.

Ode will mimic similar strategies through our branding and marketing with a light-hearted tone-of-voice, our Geneva community platform, and design-driven brands that redefine sustainable fashion.

05 NEW BUSINESS OPPORTUNITY

Sustainable fashion.
Redefined.

ODE

Made-to-order.

NEW BUSINESS OPPORTUNITY | GUIDING THEMES

CONSIDERED CONSUMPTION

Climate change (BoF & McKinsey, 2022:82a) and inflation (Mintel, 2022b) are key factors affecting the market as consumers re-evaluate their purchasing habits. However, almost half of younger consumers are not being constrained by financial pressures, rather taking an approach of intentional spending (Tan *et al.*, 2023).

A small-scale survey showed sustainability as highly important to respondents when making clothing purchases (see Appendix 5).

BRAND CITIZENS

Young consumers expect more from fashion organisations than design alone. They are placing increasing value on a brand's sustainability stance with cultural capital becoming a notable measure of a brand's success and relevance (Tan *et al.*, 2023).

74.2% of respondents' desire to purchase made-to-order clothing increased upon learning it would reduce their carbon footprint (see Appendix 5).

SUSTAINABLE FASHION REDEFINED

Mono brands Reformation and Ganni approach sustainable fashion from a fresh perspective, resonating with fashion-forward Gen Z and industry-insiders alike. Sustainable marketplaces have been slow to adopt this updated approach, continuing to embody traditional eco identities and missing out on a notable group of conscious yet fashion-forward consumers.

Respondents ranked aesthetic & style as important factors on their path to purchase from Ode (see Appendix 5)

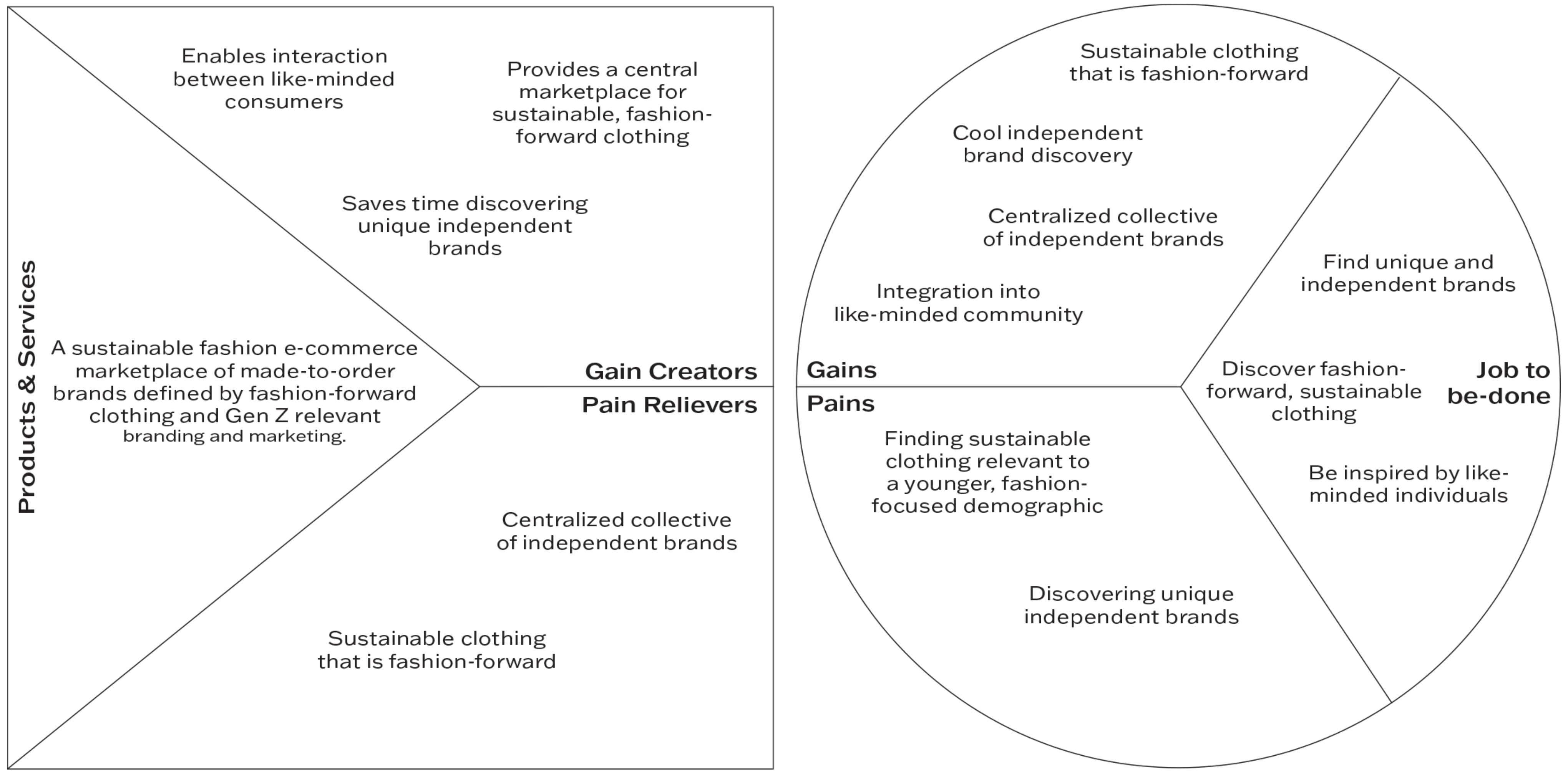
THE PROBLEM

Joergens (2006) discovered younger consumers have **negative perceptions of sustainable fashion**, associating it with **stereotypical green branding and eco clothing** (366). This value proposition canvas further identifies the Ode consumer's pain points and how Ode will address them.

THE SOLUTION

Ode brings together **sustainable yet fashion-forward brands** and promotes them with a **confident, youthful brand identity**. Consequently, **redefining sustainable fashion to a younger, fashion-driven consumer** and contributing to a more responsible fashion industry.

NEW BUSINESS OPPORTUNITY | VALUE PROPOSITION CANVAS



(Osterwalder, 2014)

MISSION STATEMENT

The Refreshed Four Ps - Purpose
(MacDonald, 2021)

NEW BUSINESS OPPORTUNITY | THE BRAND

Through our marketplace of made-to-order, fashion-forward brands, Ode will redefine sustainable fashion to a young, fashion-driven consumer by championing community and utilising a confident and relatable tone-of-voice.

VISION STATEMENT

Ode will redefine sustainable fashion to fashion-driven consumers.

NEW BUSINESS OPPORTUNITY | THE BRAND

ODE

/əʊd/

noun

a lyric poem, typically one in the form of an address to a particular subject, written in varied or irregular metre (Oxford Languages, 2023)

Ode approaches sustainable fashion from a different (or irregular) perspective, represents the celebration of a subject from a unique angle.

It is an abbreviation for the word '(o)n-(de)mand' - a synonym for made-to-order.

06 BUSINESS MODEL CANVAS

KEY PARTNERS

Brands - clothing

No Issue - packaging

Freelance Marketing, Content & SEO Agency

KEY RESOURCES

Brands

Website

KEY ACTIVITIES

Retail management

Brand sourcing

Product curation

Education on sustainable consumption

Community gathering of young, like-minded, fashion-forward sustainable consumers through Geneva community platform

VALUE PROPOSITIONS

Product – fashion-forward sustainable clothing

Service – centralized curation of independent, made-to-order brands

DISTRIBUTION CHANNELS

Website

CUSTOMER RELATIONSHIPS

E-commerce website

Brand through social media

Online experience

Geneva community platform

CUSTOMER SEGMENTS

Conscious yet fashion-driven Gen Z and younger millennials

A focus on not necessarily high earners but those who allocate a large portion of their income to fashion

COST STRUCTURE

Place – website

People – payroll

Variables – marketing, packaging, photoshoots

REVENUE STREAMS

Sale of clothing - 25% commission from brands

(Osterwalder, 2005)

07 MARKETING MIX

7.1 PRODUCT AND SERVICE

FASHION FORWARD

At Ode, we believe sustainability and style can go hand in hand. Our independent brands have been selected for their alignment with our mission to redefine sustainable fashion.

MADE-TO-ORDER

All pieces on Ode are made-to-order. This offers an alternative approach to sustainable shopping that serves our fashion-driven, conscious consumers.

COMMUNITY

Ode emphasises purpose-driven consumption and community through our Geneva community platform that allows like-minded consumers to interact with our brands and one another.

Community, Sustainability,
Fashion-focused, Made-to-order.

Ode is characterised by our USP of made-to-order fashion. This approach of ordering an unmade garment and having it made just for you offers a meaningful experience that directly opposes mass-produced fast fashion consumption.

The Refreshed Four Ps - Personalised
(MacDonald, 2021)

Ode’s alternative commerce model and updated approach to sustainable fashion addresses a gap in the market for clothing that is both responsible and fashion-forward. It allows younger, fashion-driven consumers to purchase new clothing while practicing conscious consumption.

THE BRANDS

The Refreshed Four Ps - Partnerships
(MacDonald, 2021)

MARKETING MIX | PRODUCT AND SERVICE | THE BRANDS

Our brands are industry changemakers – working hand-in-hand with us to redefine sustainable fashion.

To the consumer, we are Ode but our existence relies on our brands. As small, independent businesses, we want to ensure they mutually benefit from being part of Ode.

We maintain front-end control of how they are displayed on Ode and take a 25% commission of sales. In exchange, we action large and costly tasks such as marketing, brand awareness, consumer targeting and customer service.

MARKETING MIX | PRODUCT AND SERVICE | THE BRANDS

Bella Venice

MaisonCléo

FAIT PAR FOUTCH

AN ORIGINAL, POUR VOUS

MURLONG CRES.

MIRROR PALAIS

Idáh

Our brands are characterized by **made-to-order** production and their aligned perspective on an **uncompromising relationship between style and sustainability**. Additionally, they each have unique traits such as being locally crafted, made from deadstock fabrics or founder-run.

These six brands have been spotlighted as they strongly represent the Ode aesthetic and product available on site.

(For all brands, see Appendix 6)

7.2 PRICE

Due to traceable production, responsible materials and ethical wages, amongst other factors, sustainable fashion is generally more expensive than fast fashion (Cernansky, 2020). **Gen Z and Millennials** are increasingly aware of the impact of their disposable consumption habits and are **willing to pay 50% more for sustainably-made clothing** (Arnett, 2020).

As a marketplace, prices are not set by Ode and differ between brands. However, we have estimated the **average price** of a blouse to be **£197** (see Appendix 8).

7.3 PROMOTION AND PERSUASION

Sustainable fashion.
Redefined.

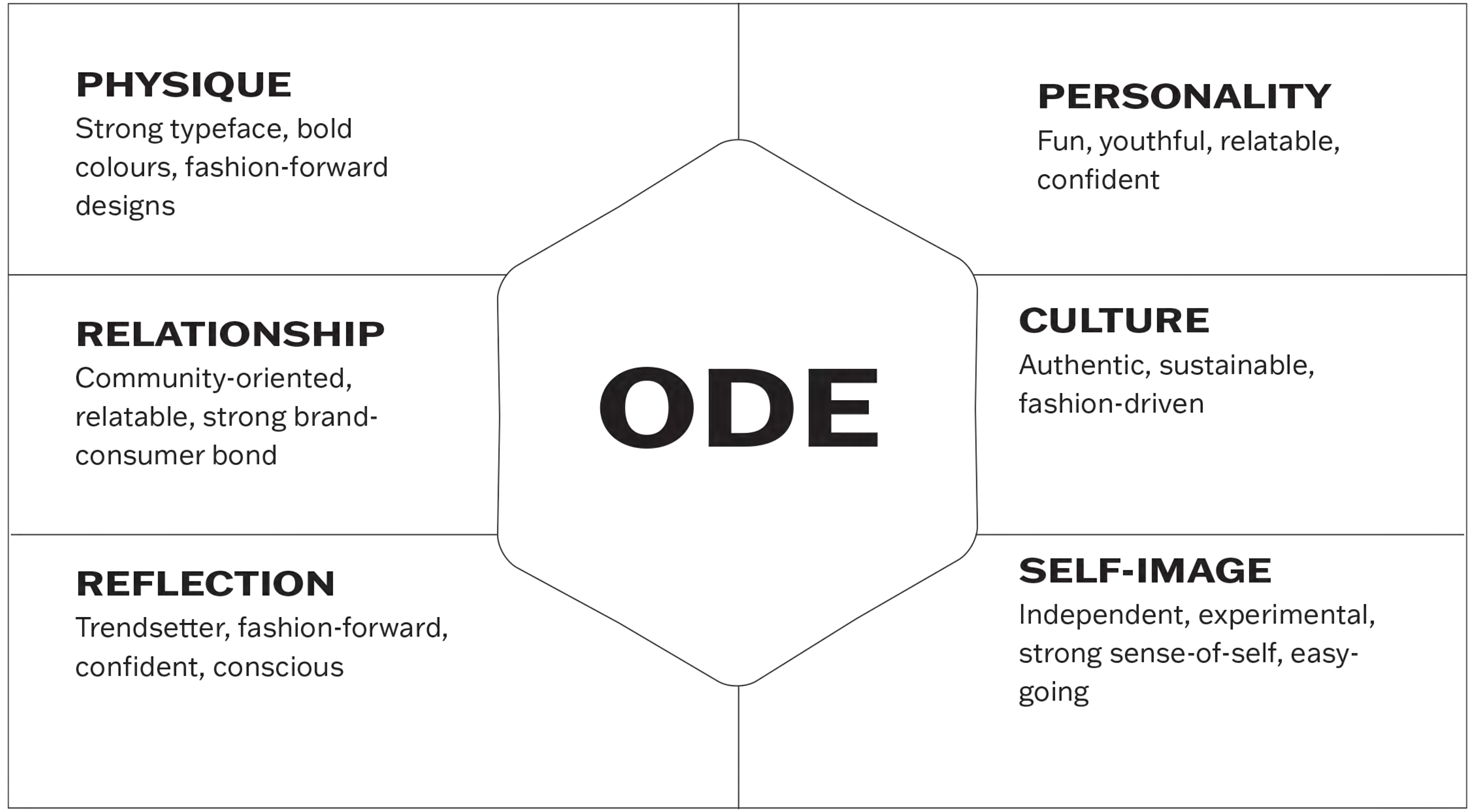
Sustainable fashion's traditional green tropes and eco clothing have earned it a repuation with younger consumers as unappealing with unenticing product (Joergens, 2006:366).

Ode was created to offer Gen Z and Millennials attractive, fashion-forward sustainable clothing with fun and enticing branding and communications. To support our vision, we are channelling inspiration from cult 'It Girl' fashion brands such as Ganni and Reformation.

Ode is The Explorer
(The Hartford, s.d.).

Driven by experience - made-to-order process.
Ambitious and pioneering - redefining sustainability.
Individualistic and discovery-oriented - unique, independent brands.

The Explorer archetype informs our marketing niche of **boldness, authenticity and transparency** and our brand identity of **going against the mainstream**.

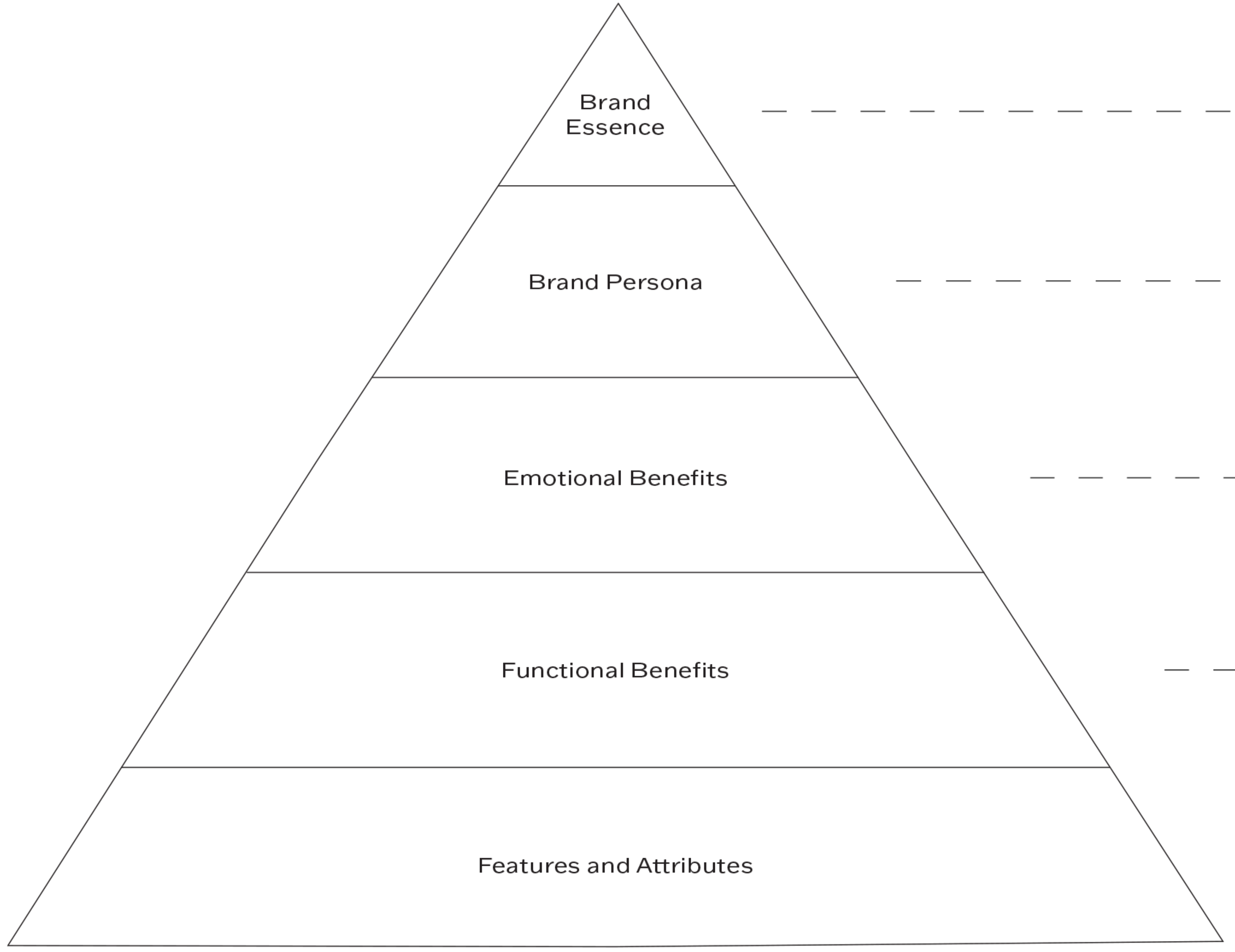


MARKETING MIX | PROMOTION AND PERSUASION | BRAND IDENTITY PRISM

This Brand Identity Prism (Kapferer, 1986) illustrates the intersection between Ode's persona and it's appearance to our consumer.

Our identity will be an **antithesis to traditional eco fashion brands.** We aim to attract a youthful, fashion-driven consumer through colloquial and **conversational tone-of-voice** and communicating **sustainability through uncomplicated messaging**.

The Refreshed Four Ps - Positioning
(MacDonald, 2021)



(Millward Brown, 1990)

MARKETING MIX | PROMOTION AND PERSUASION | BRAND PYRAMID

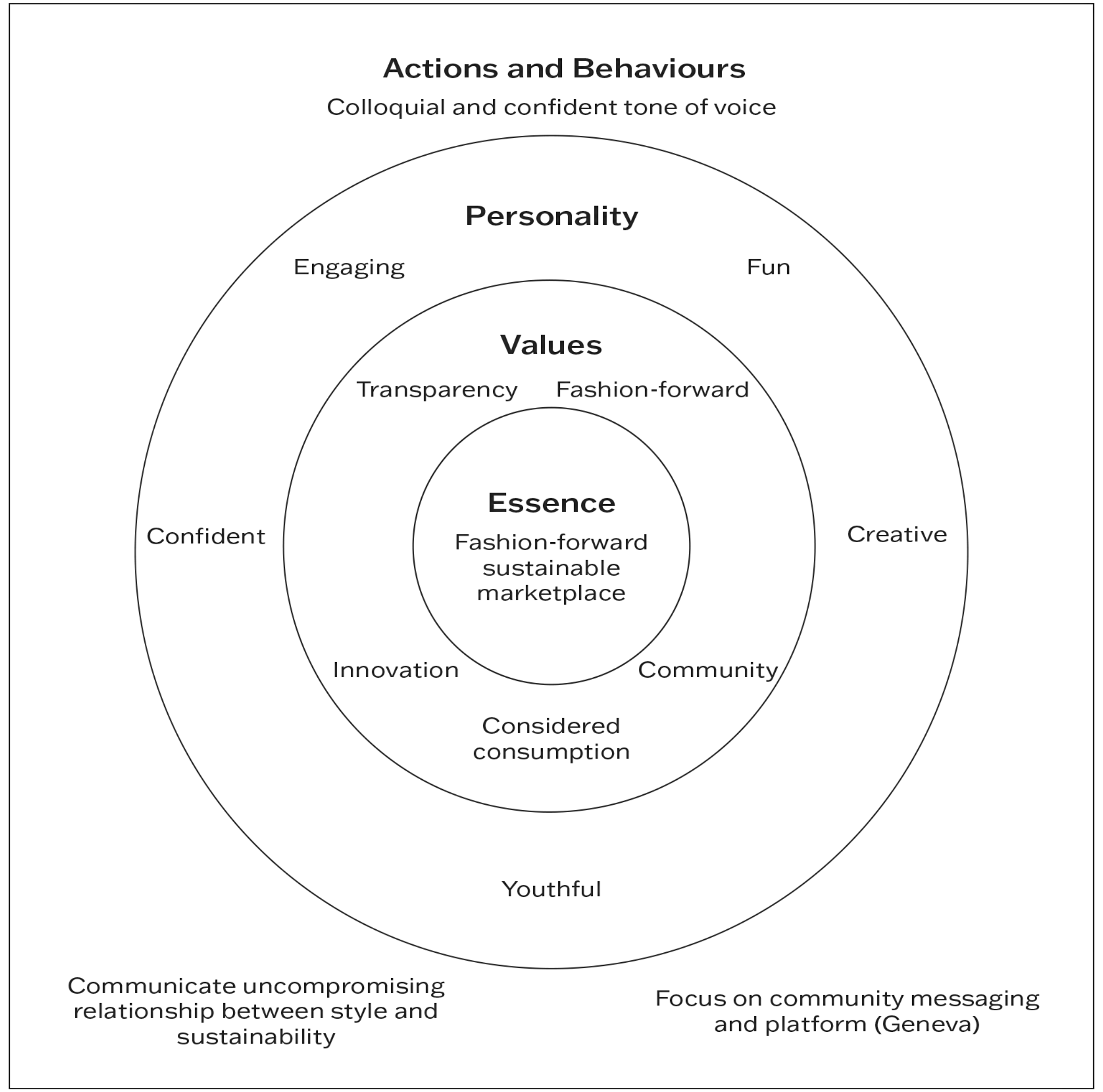
An alternative method of conscious consumption for the fashion-forward consumer.

Cool, confident, authentic.

The made-to-order process adds an experiential element to the purchase journey. Our Geneva community platform will unite like-minded consumers and forge a deeper connection with the community.

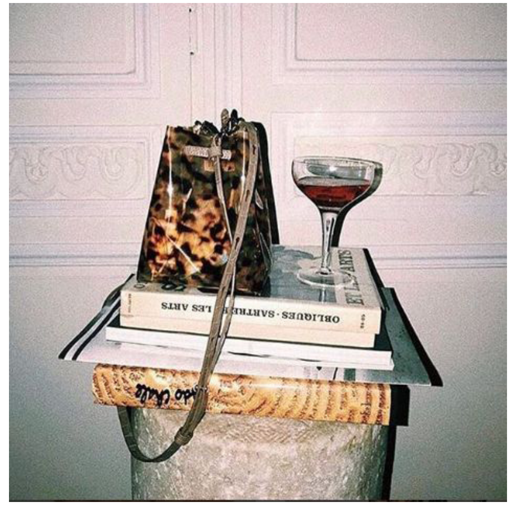
Conscious consumption with a fashion-forward approach

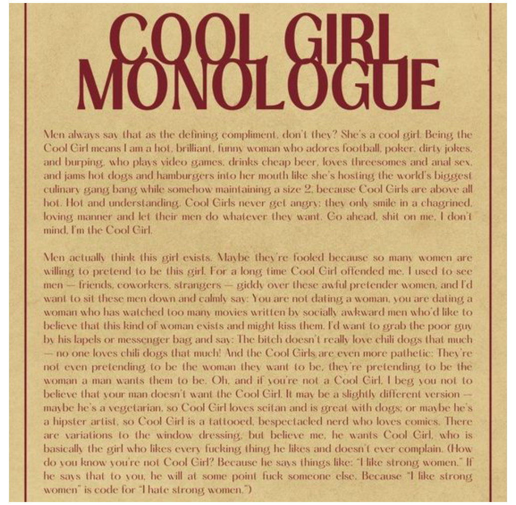
Sustainable fashion e-commerce marketplace that offers fashion-forward clothing curated from independent, made-to-order brands.



MARKETING MIX | PROMOTION AND PERSUASION | BRAND ONION

The Ode brand onion was informed by a thorough understanding of our consumer through the Segmentation, Targeting and Positioning model (see Appendix 8). It provides a succinct overview of Ode's brand identity and how it will translate through our actions and behaviours (Posner, 2015). It will keep us anchored to our target audience, purpose and mission.





COOL GIRL MONOLOGUE

Men always say that as the defining compliment, don't they? She's a cool girl. Being the Cool Girl means I am a hot, brilliant, funny woman who adores football, poker, dirty jokes, and burping, who plays video games, drinks cheap beer, loves threesomes and anal sex, and jams hot dogs and hamburgers into her mouth like she's hosting the world's biggest culinary gang bang while somehow maintaining a size 2, because Cool Girls are above all hot. Hot and understanding. Cool Girls never get angry; they only smile in a chagrined, loving manner and let their men do whatever they want. Go ahead, shit on me, I don't mind, I'm the Cool Girl.

Men actually think this girl exists. Maybe they're fooled because so many women are willing to pretend to be this girl. For a long time Cool Girl offended me. I used to see men — friends, coworkers, strangers — giddy over these awful pretender women, and I'd want to sit these men down and calmly say: You are not dating a woman, you are dating a woman who has watched too many movies written by socially awkward men who'd like to believe that this kind of woman exists and might kiss them. I'd want to grab the poor guy by his lapels or messenger bag and say: The bitch doesn't really love chili dogs that much — no one loves chili dogs that much! And the Cool Girls are even more pathetic: They're not even pretending to be the woman they want to be, they're pretending to be the woman a man wants them to be. Oh, and if you're not a Cool Girl, I beg you not to believe that your man doesn't want the Cool Girl. It may be a slightly different version — maybe he's a vegetarian, so Cool Girl loves seitan and is great with dogs; or maybe he's a hipster artist, so Cool Girl is a tattooed, bespectacled nerd who loves comics. There are variations to the window dressing, but believe me, he wants Cool Girl, who is basically the girl who likes every fucking thing he likes and doesn't ever complain. (How do you know you're not Cool Girl? Because he says things like: "I like strong women." If he says that to you, he will at some point fuck someone else. Because "I like strong women" is code for "I hate strong women.")

TYPOGRAPHY

Aa

Franklin Gothic Regular
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz

Aa

Franklin Gothic Bold
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz

Aa

Daniel Regular
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz

TONE OF VOICE

Branding specialists, Kantar, identify a "down-to-earth, conversational TOV" as key to resonating with Gen Z (Blanch-Bennet *et al.*, 2022:5).

WEBSITE

Dreamy designs on-demand.

Cool clothes. Shop them.

ORDER CONFIRMATION

See you in 2 - 3 weeks.

Get there as soon as we can xo

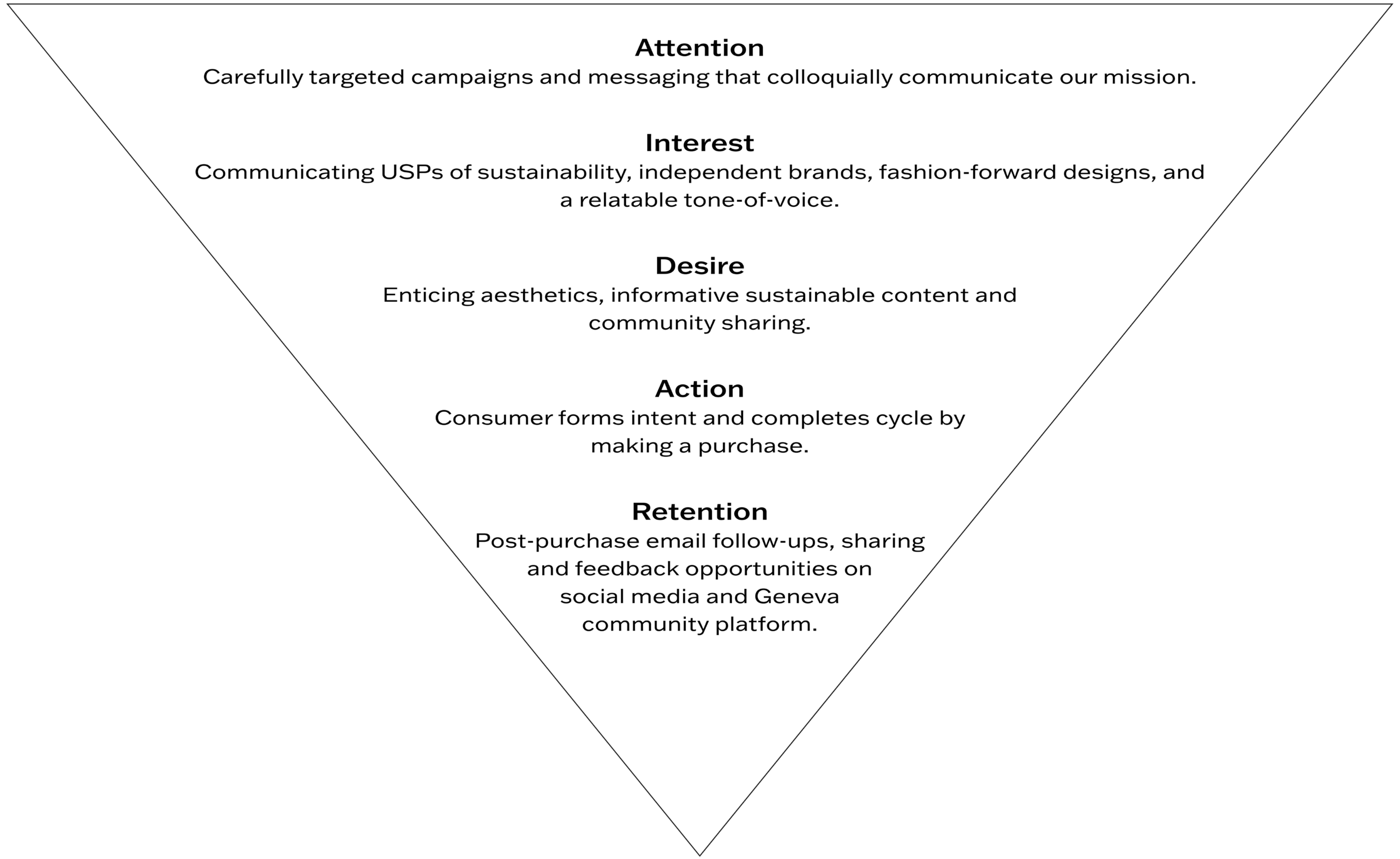
“Gen Z is a generation whose discourse is playful, non-judgemental, boundary-questioning and knowing [], they connect most with brands with identities that reflect these attributes.”
Cara Bendon (see Appendix 4)

Our communications will be crucial in redefining sustainable fashion to a younger, more fashion-driven consumer. It will rely on our relatable tone-of-voice, playful wording and being transparent in a digestible and colloquial way.

INTEGRATED MARKETING STRATEGY

The AIDA Model Adapted (Hanlon, 2023)

MARKETING MIX | PROMOTION AND PERSUASION | INTEGRATED MARKETING STRATEGY



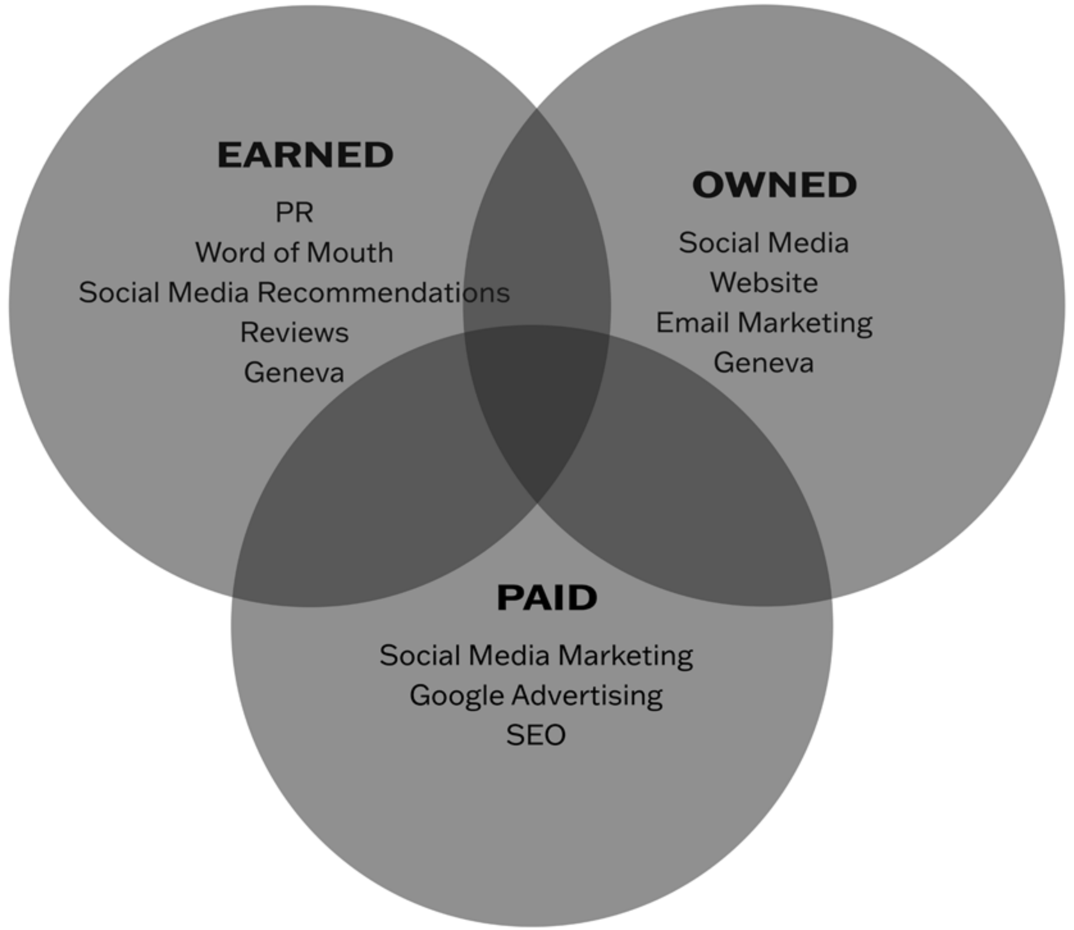
MARKETING MIX | PROMOTION AND PERSUASION | INTEGRATED MARKETING STRATEGY

Pre-Launch

Establishing a clear brand identity and **building brand awareness** of Ode as a **marketplace** will be our primary priority. Marketing and content will focus on our USP and what we offer the consumer as a platform - highlighting marketplace convenience and emotional benefits of a like-minded community.

Post-Launch

Once we have established our identity as a marketplace, our strategy will expand to incorporate spotlighting our brands and their unique individualities.

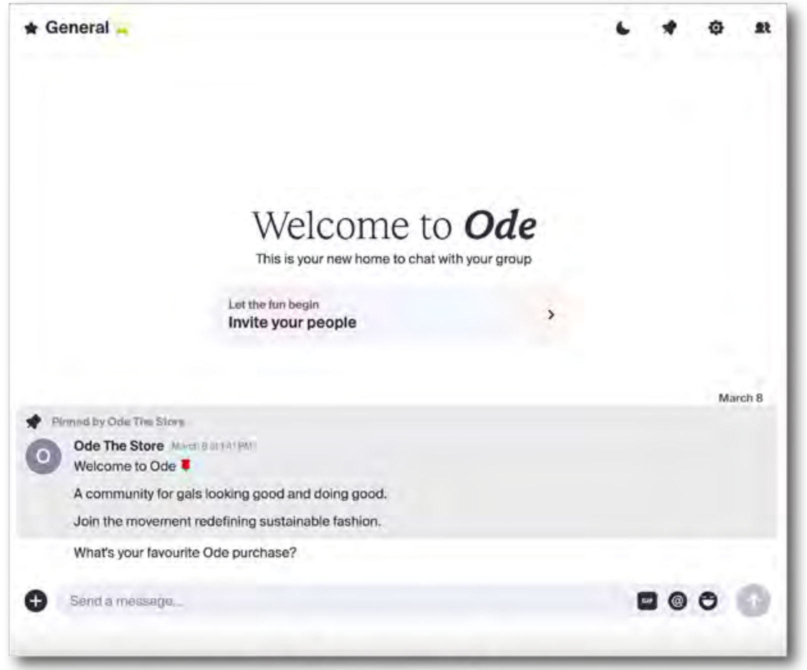


MARKETING MIX | PROMOTION AND PERSUASION | INTEGRATED MARKETING STRATEGY

Ode will approach our marketing strategy through earned, owned and paid media.

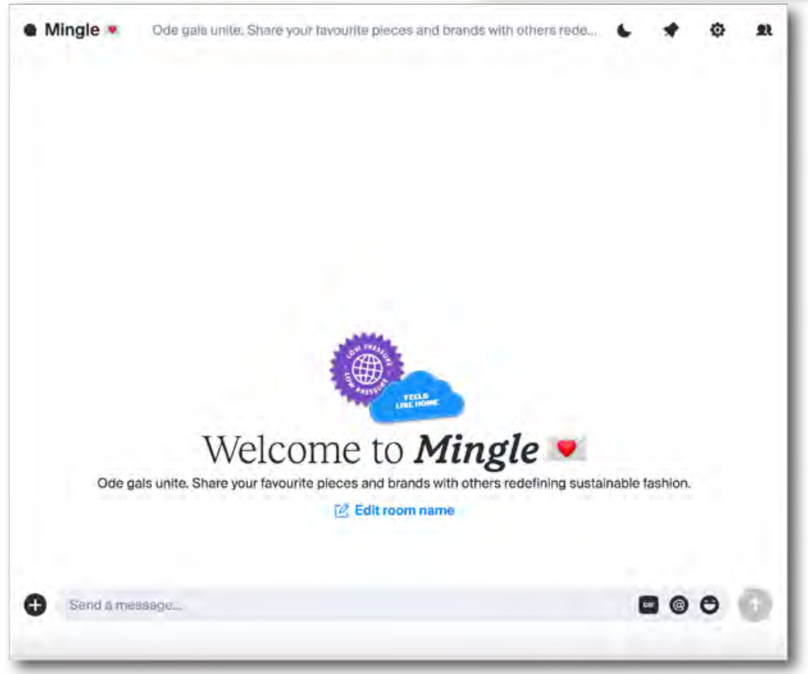
Earned and owned media will be our primary focus to ensure an authentic and transparent image of Ode is evident to our target consumer.

To effectively utilise paid media channels, we will work with an SEO and performance marketing consultancy for sponsored Google results, keywords and ranking. We will use a social media agency for Instagram, TikTok & Pinterest advertising.

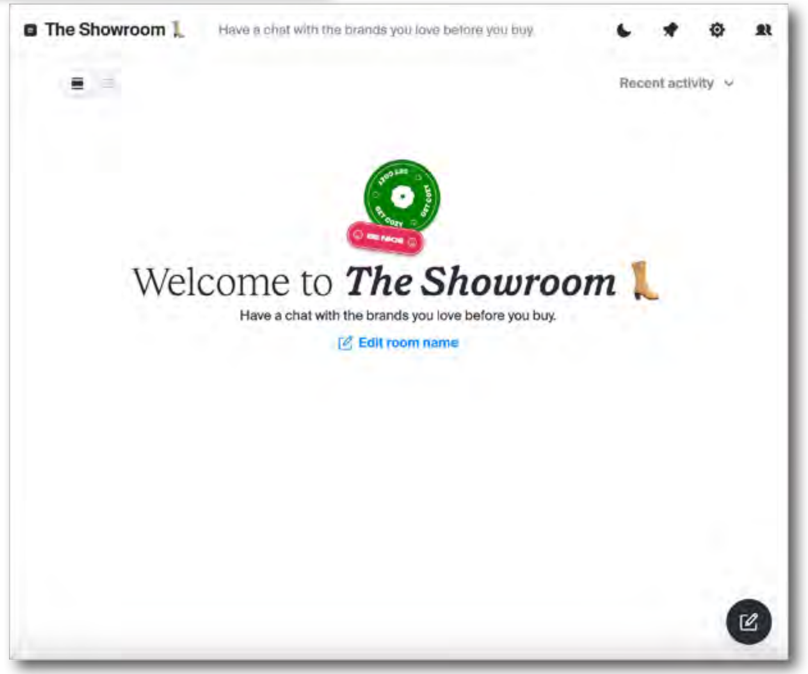


For Ode announcements

For consumers to interact



For brands to answer Qs



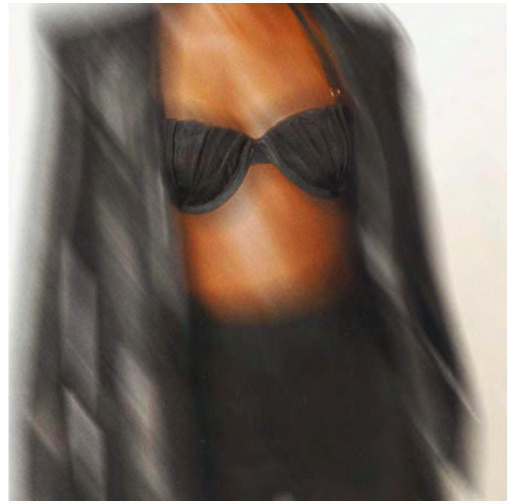
Our Geneva community platform will be an integral part of our earned and owned media.

“Gen Z consumers [seek] **authenticity and connection** from the online spaces they frequent. [Geneva] allows [brands] to cultivate a sense of **community among consumers who share a passion for their products or brand mission**” (Mintel, 2022d).

Consumers can share insight on brands, size and fit, adding purchase assurance to consumers new to, or wary of, the made-to-order model.

CONTENT MARKETING

Visual communication is vital to conveying Ode's identity to our target audience. Our content will consist of aesthetic mood imagery, photos and videos from our brands as well as assets from Ode shoots showcasing multiple brands' products together. This is especially important in conveying our unique value-add as a marketplace. This content will be used for both owned and paid media.

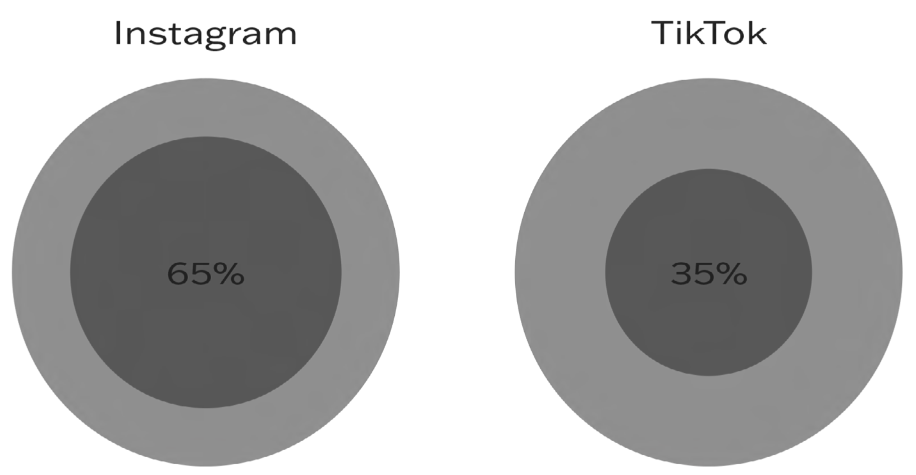





SOCIAL MEDIA MARKETING

As one of our primary communication tools, we want to ensure our **identity and value as a marketplace** is apparent through our social media.

We will pull tone-of-voice and content inspiration from noted aspirational brands, Reformation and Ganni, as effective communicators to our target consumer.



Most popular social media shopping platforms for 18–24-year-olds
(Bazaarvoice, 2022)

Instagram and TikTok will be our main channels as preferred shopping platforms of Gen Z and Millennials.

Instagram will take special priority as “one of the few platforms that Gen Z and Millennials are nearly equally likely to shop on” (Y Pulse, 2020).

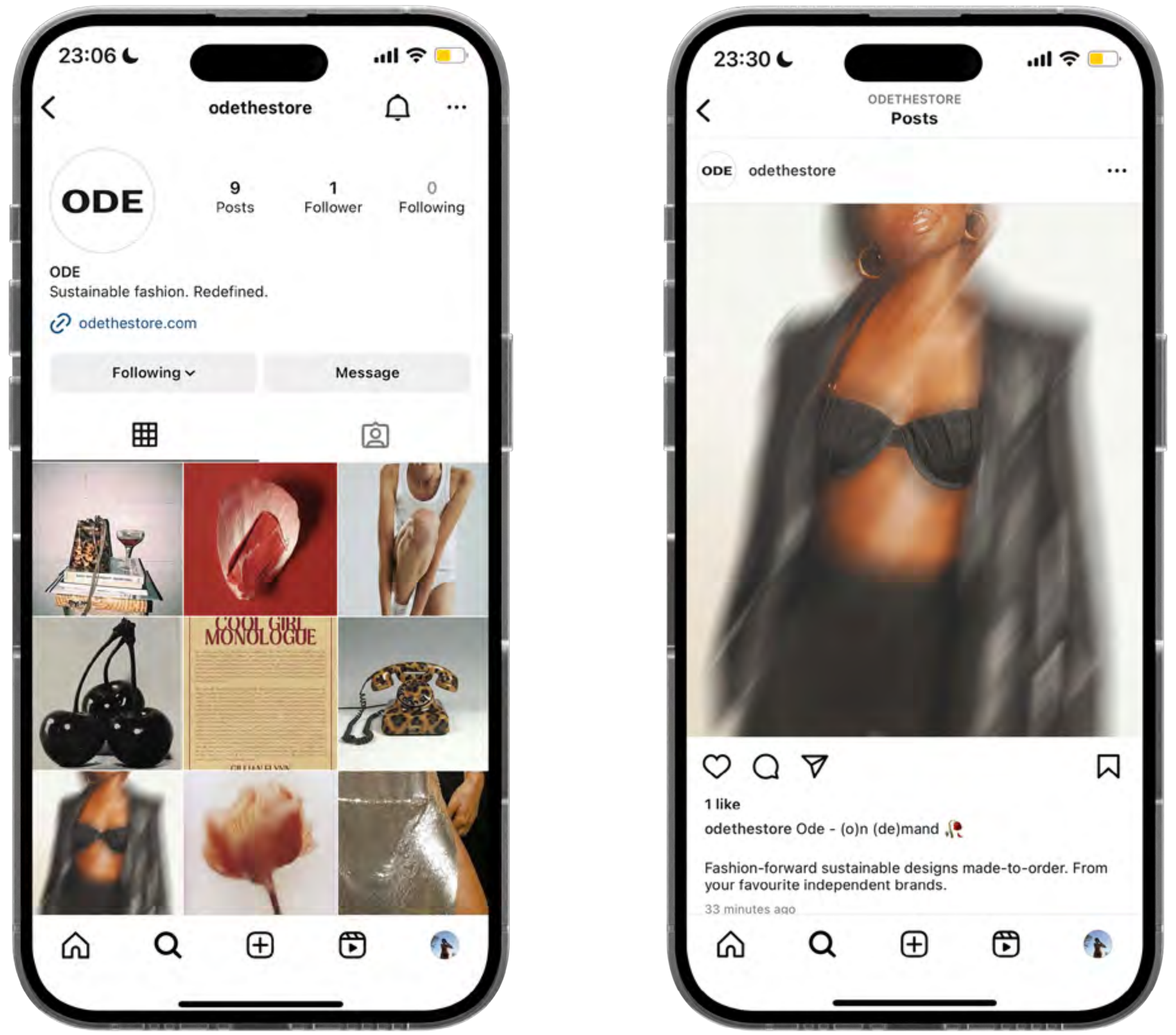
INSTAGRAM

@odethestore will be a visual curation of our identity.

Gen Z looks to Instagram for **aesthetic content and brand “history, purpose [and] values.”** Like Millennials, they want to see pieces in real life with user-generated content and try-on videos (Dretsch, 2022).

Our grid will consist of **native Ode assets** and **individual brand imagery**. As one of our main consumer touchpoints, Instagram will be key to generating curiosity and driving consumers to our website.

MARKETING MIX | PROMOTION AND PERSUASION | INSTAGRAM MARKETING



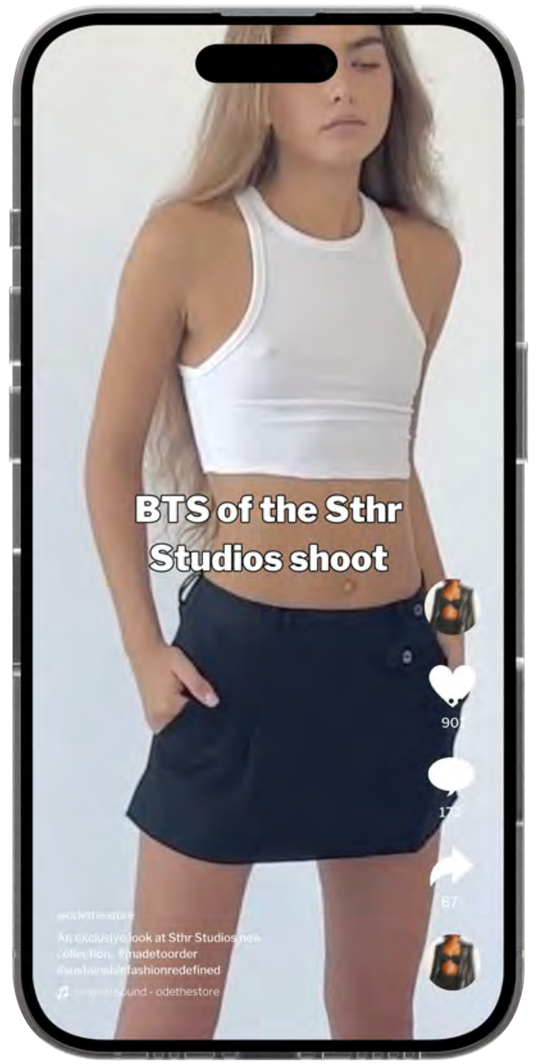
TIKTOK

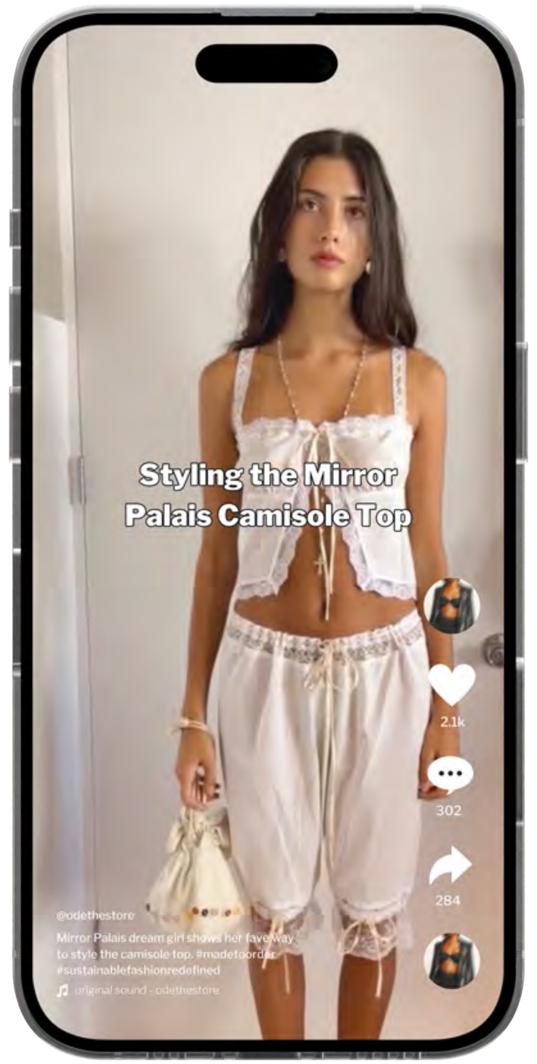
Gen Z and Millennials look to TikTok for a more personal relationship with brands through **unfiltered content** as well as **social proof** from other consumers (Dretsch, 2022).

Our TikTok will be more organic and less curated than Instagram - consisting of **behind-the-scenes** videos and **user-generated content**.

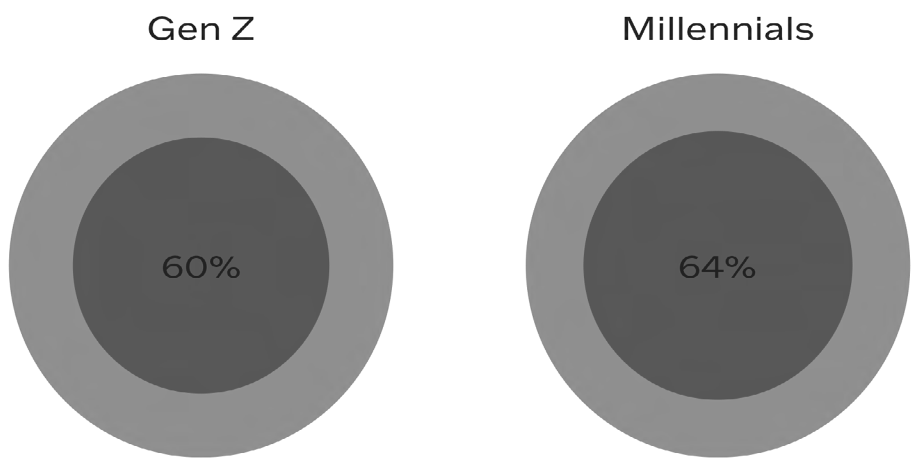
To communicate our USP in a platform-relevant way, we will post short, engaging videos of the made-to-order process and spotlight videos of our brands producing orders.

MARKETING MIX | PROMOTION AND PERSUASION | TIKTOK MARKETING





EMAIL MARKETING

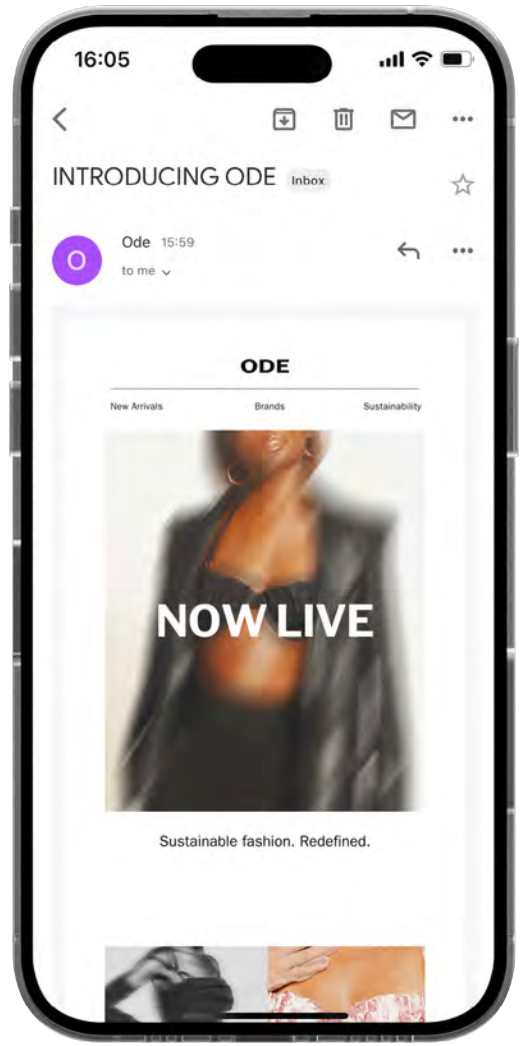


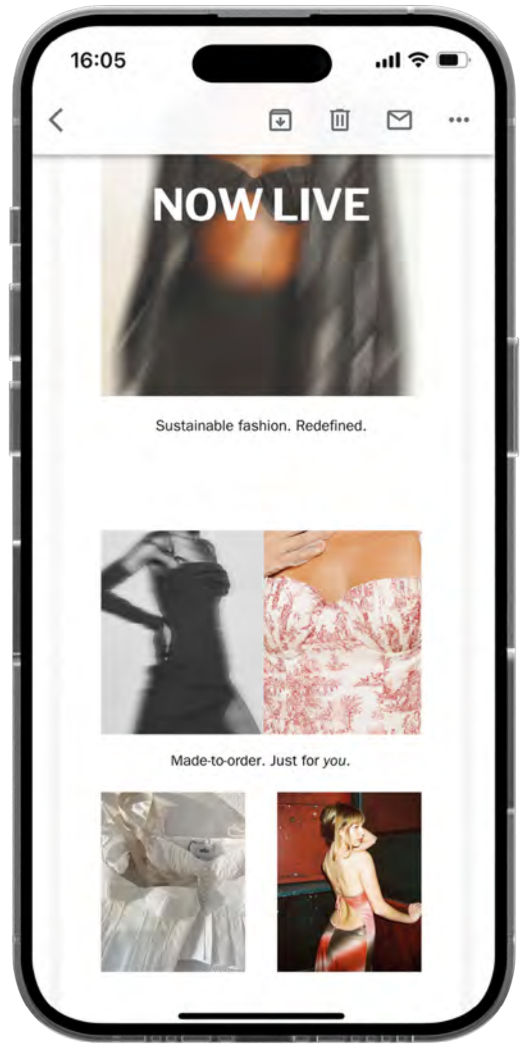
consider email the most personal way to receive brand communications
(Bluecore, 2016)

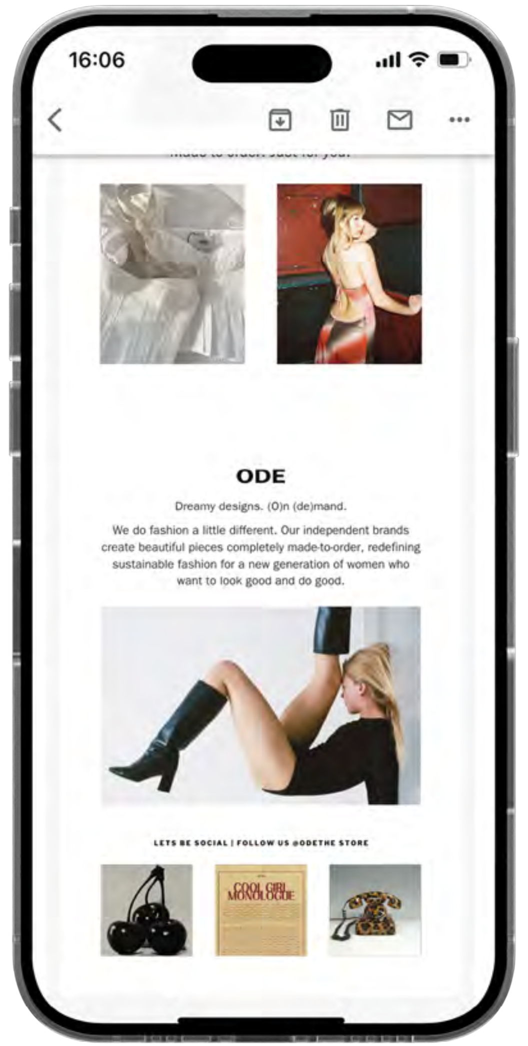
Ode newsletters are an opportunity to communicate with consumers in a more intimate way.

We will send out emails once a week cycling between pre-order release dates, new brand introductions, conversations with brand founders and informative behind-the-scenes content.

MARKETING MIX | PROMOTION AND PERSUASION | EMAIL MARKETING







PR STRATEGY

In line with our brand identity we will target established fashion publications like British Vogue and Elle UK as well as contemporary publications like Dazed and AnOther. We will avoid sustainable publications to ensure our positioning as a fashion-forward marketplace is clear.

MARKETING MIX | PROMOTION AND PERSUASION | PR STRATEGY

VOGUE ELLE
SHEERLUXE i-D
DAZED AnOther

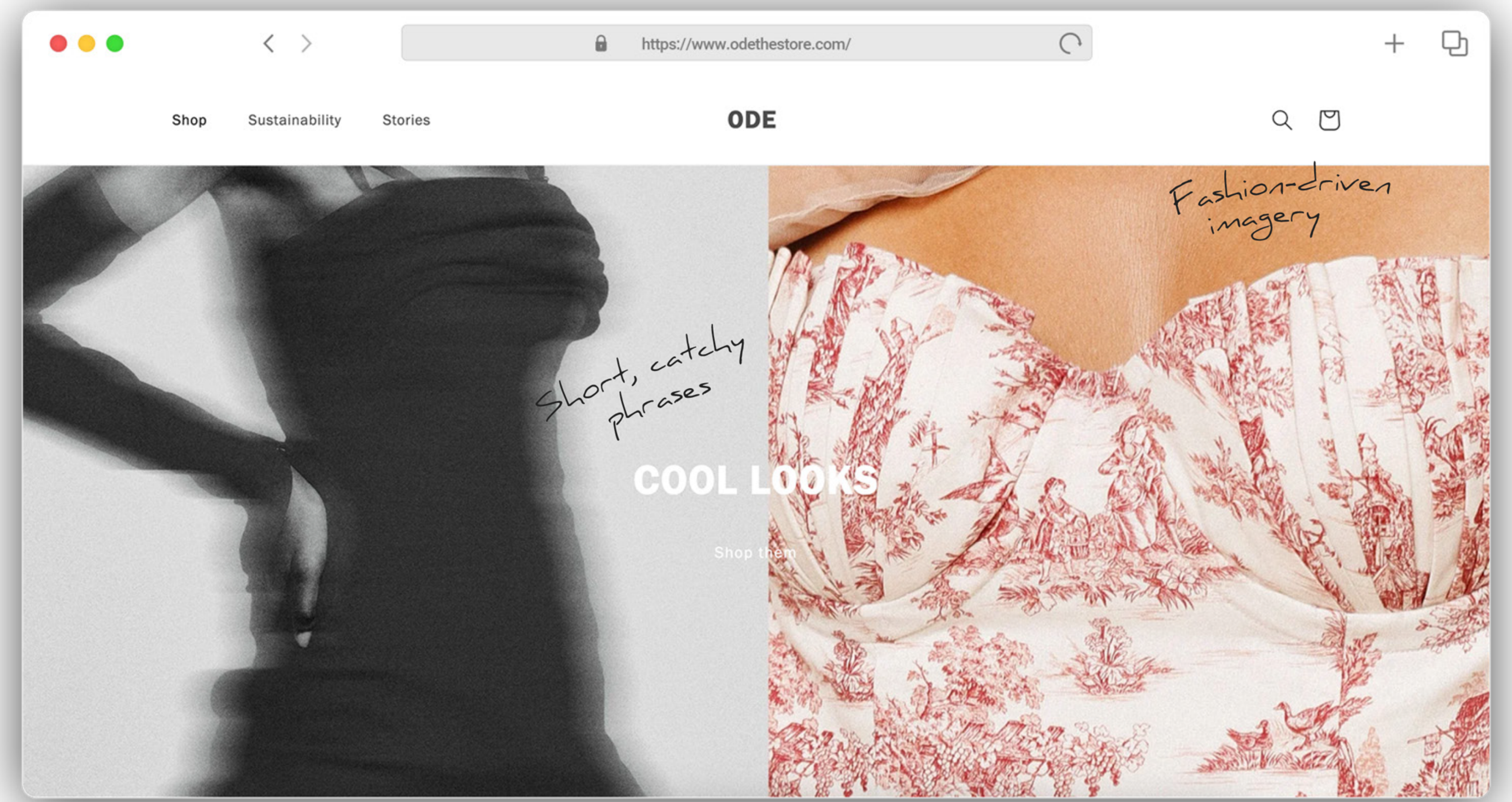
7.4 PLACE

MARKETING MIX | PROMOTION AND PERSUASION | PLACE

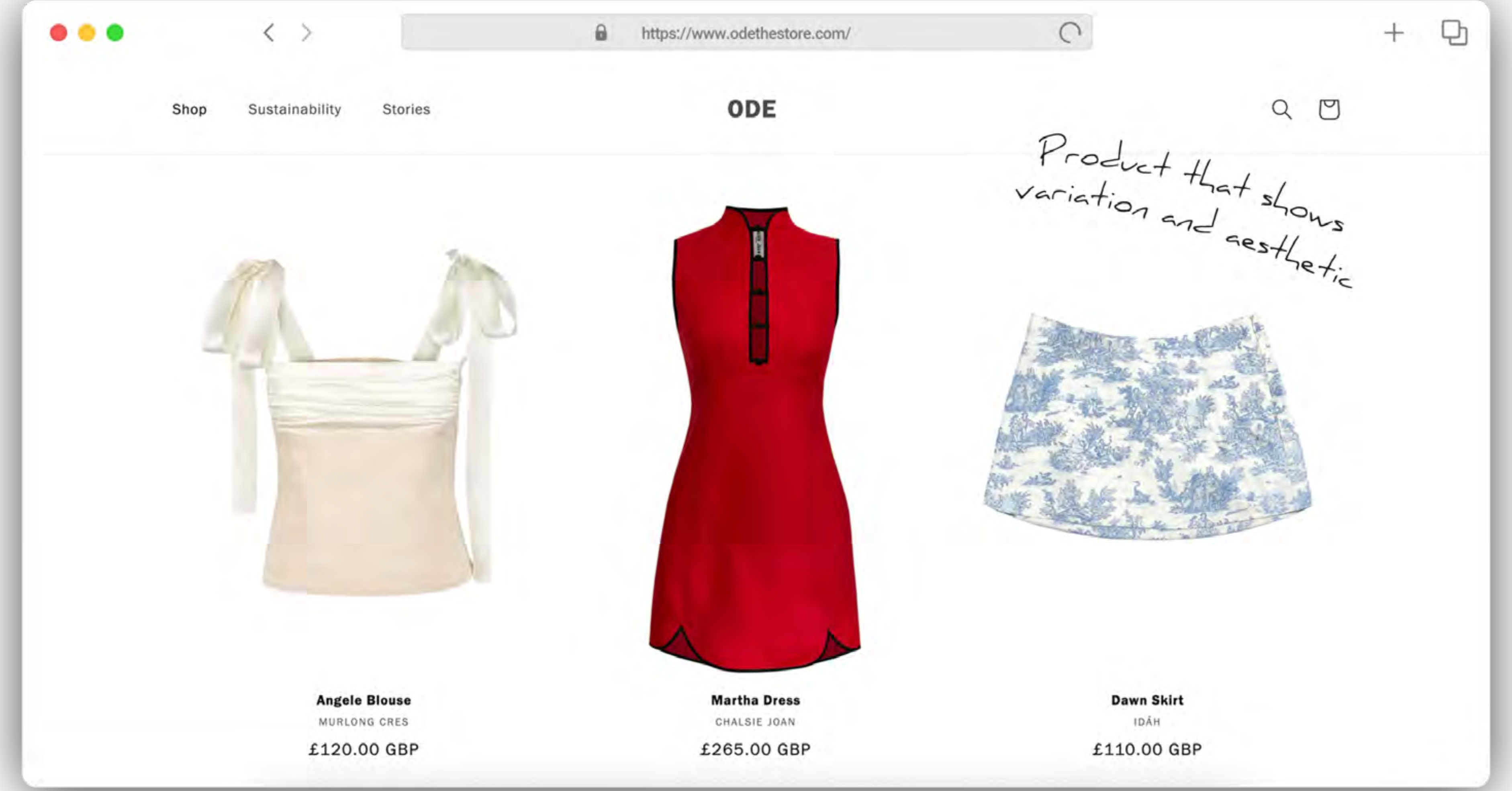
"A brand's identity comes through in their visual brand and their language –from the cookie consent banner message to the brand's packaging and everything in-between, and it helps create r**esonance and connection between the consumer and the brand**."
Cara Bendon (see Appendix 4)

Our website is our main consumer touchpoint and sole point of purchase, therefore, it must be the truest and most authentic representation of Ode as possible.

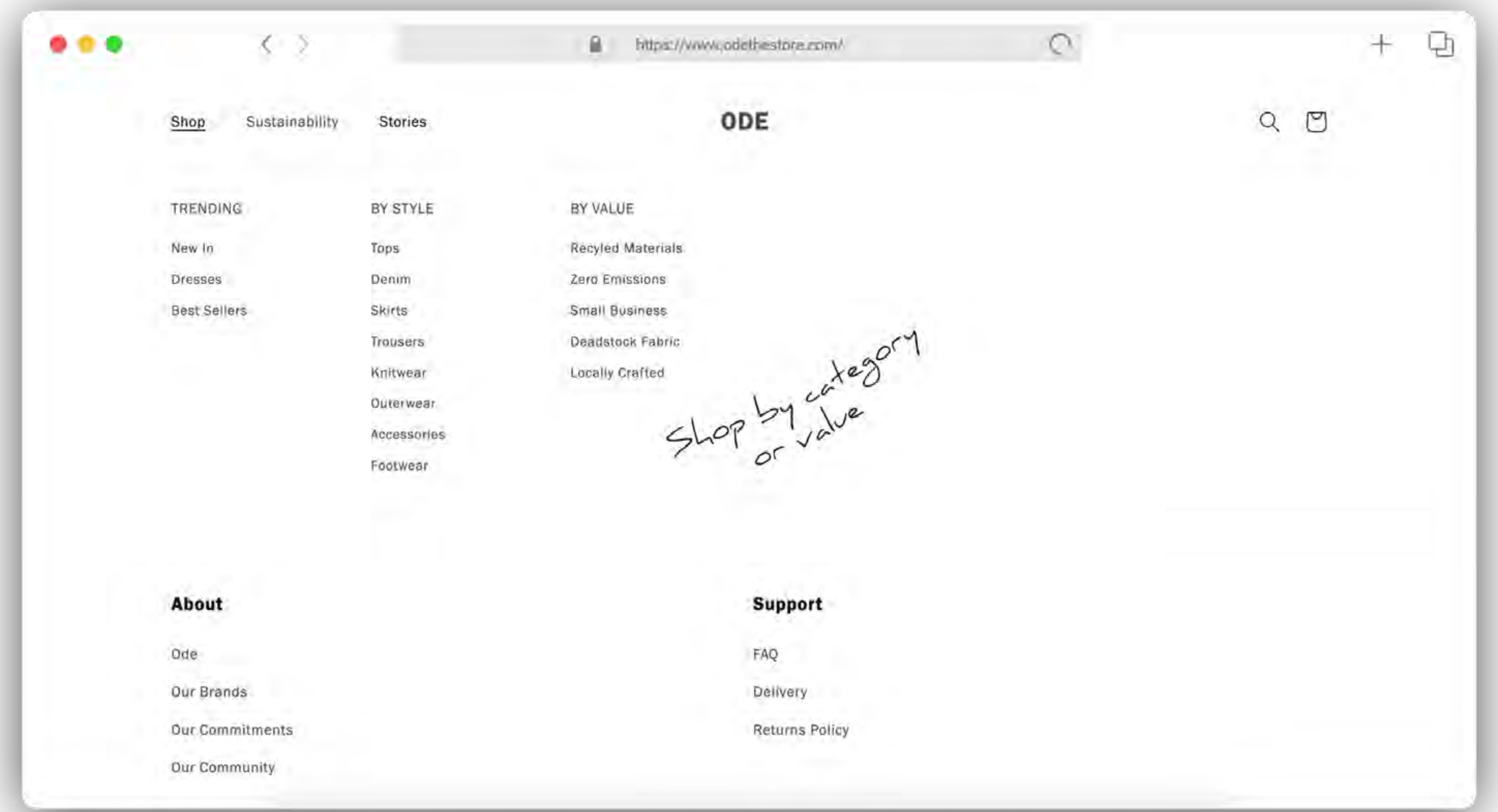
HOMEPAGE



HOMEPAGE

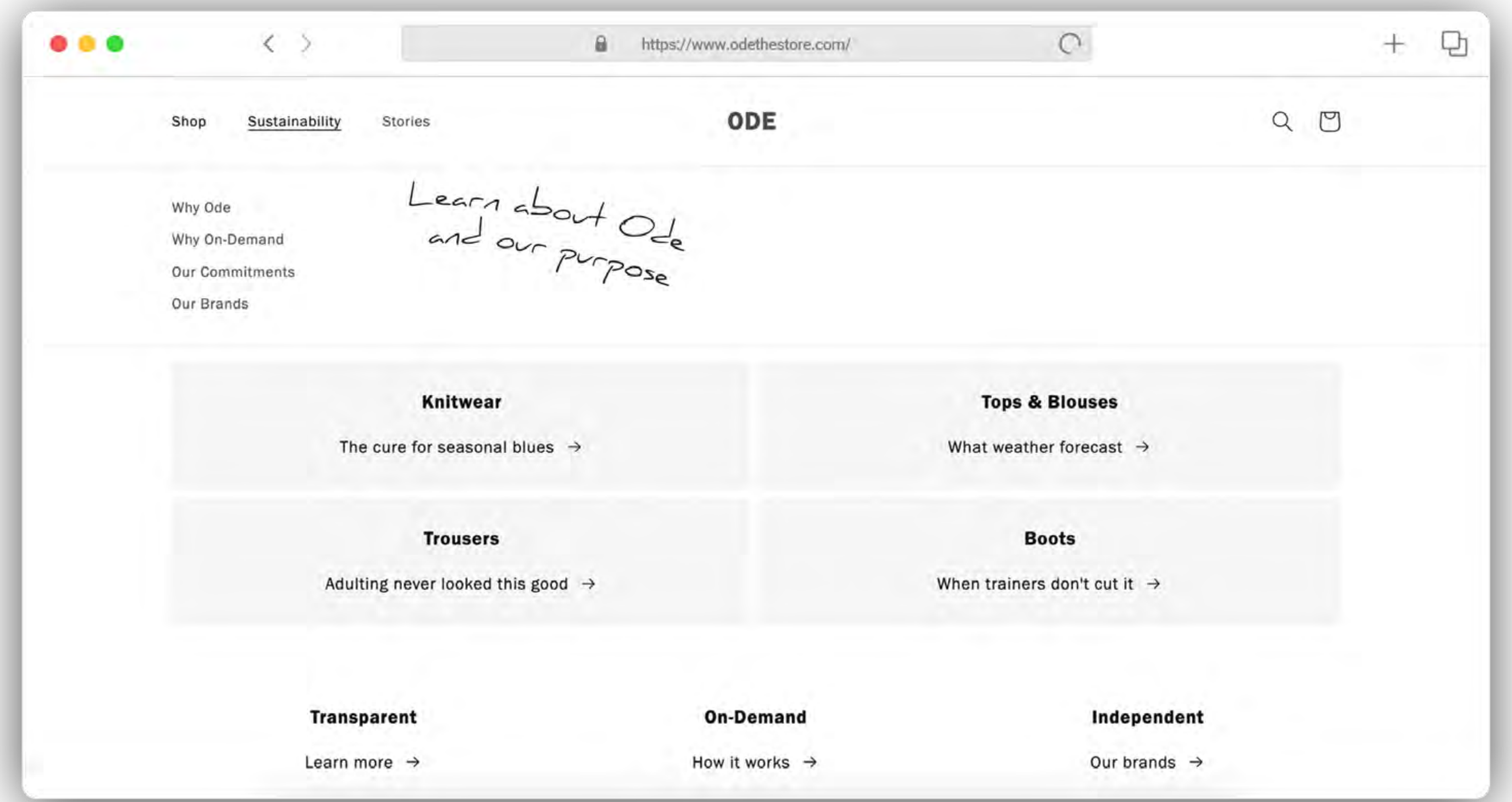


SHOP

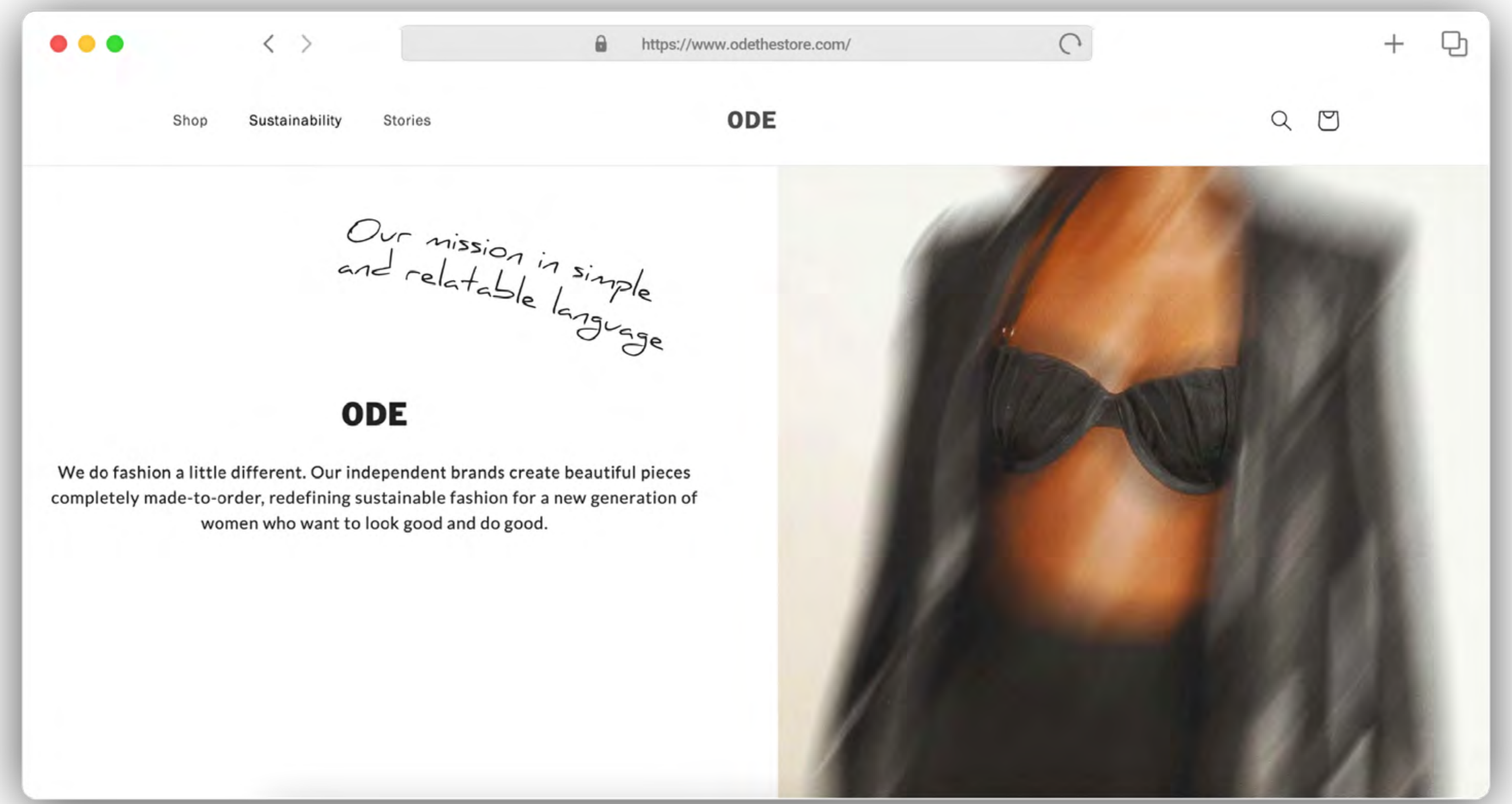


MARKETING MIX | PROMOTION AND PERSUASION | PLACE

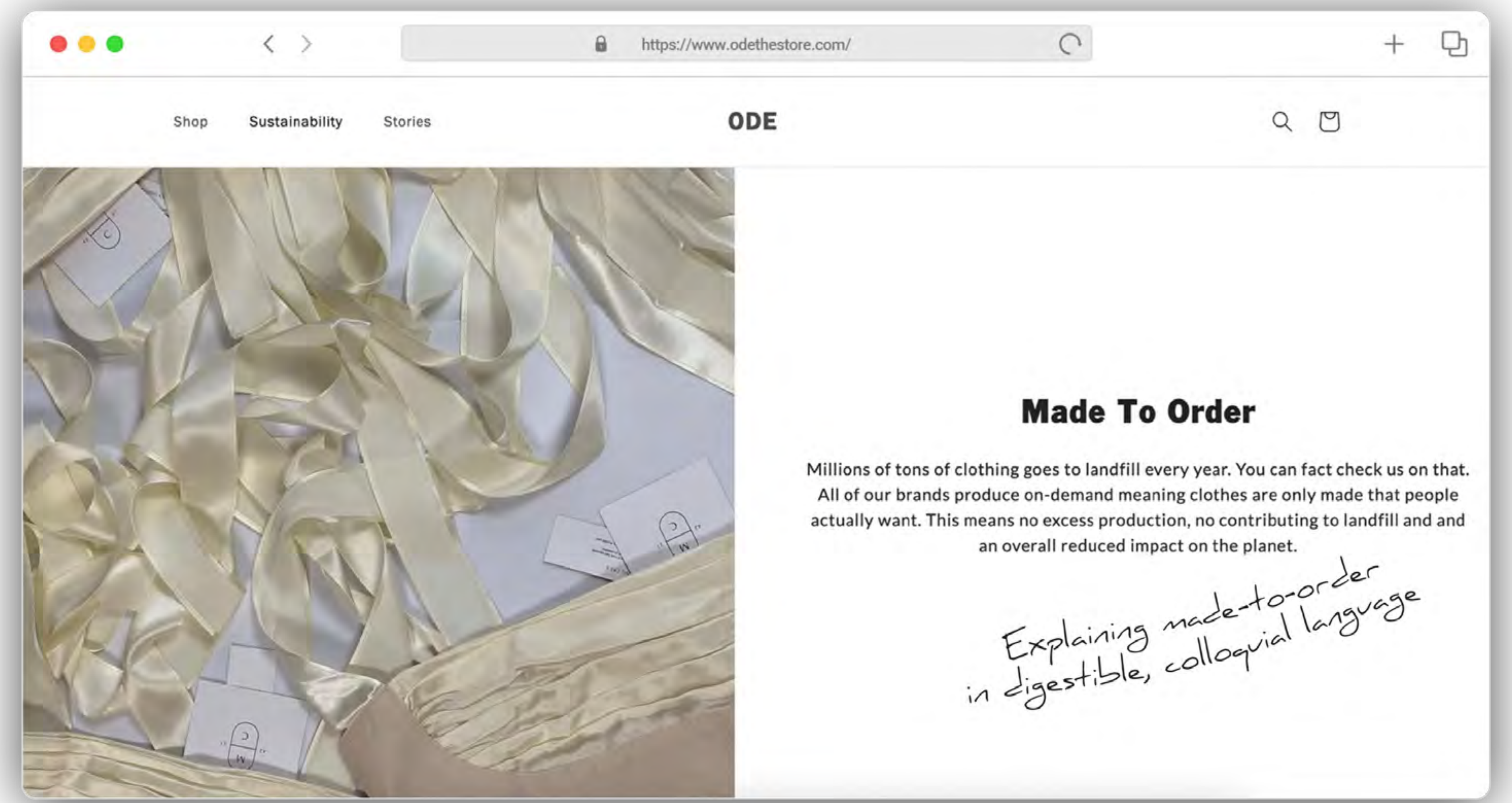
SUSTAINABILITY



WHY ODE



WHY ODE



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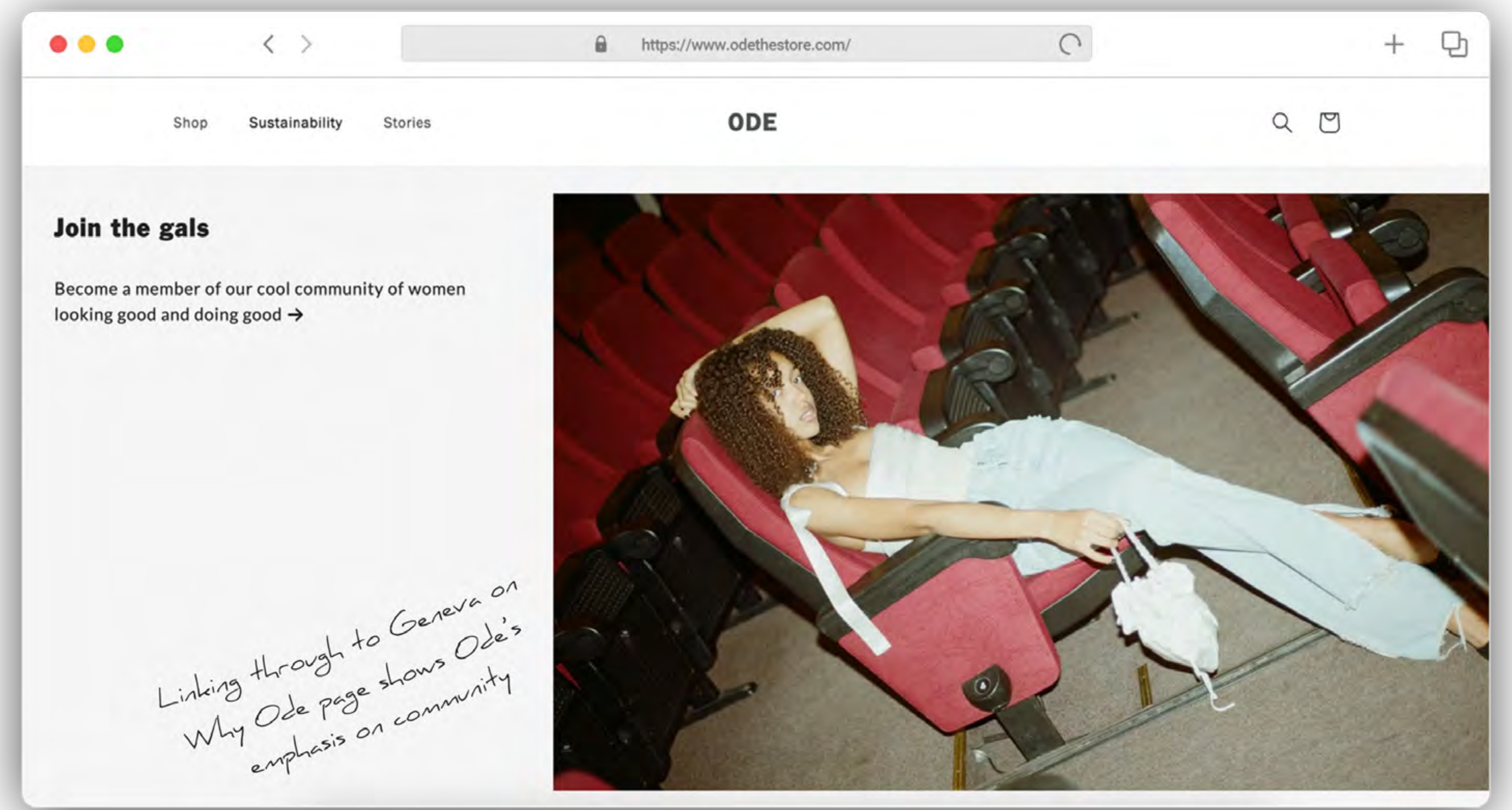


These annotated mock-ups serve as a basic visual and content indicator of the Ode website. The next stages of materialising Ode would involve wireframing and building out the site.

7.5 PEOPLE

Due to our marketplace model, Ode will initially only require a small team in Creative, E-Commerce and Brand Partnership roles - the founder, a Brand Partnerships Executive and an E-Commerce Executive. We will be supported by freelance SEO & social media agencies.

MARKETING MIX | PEOPLE

TALITHA WARD

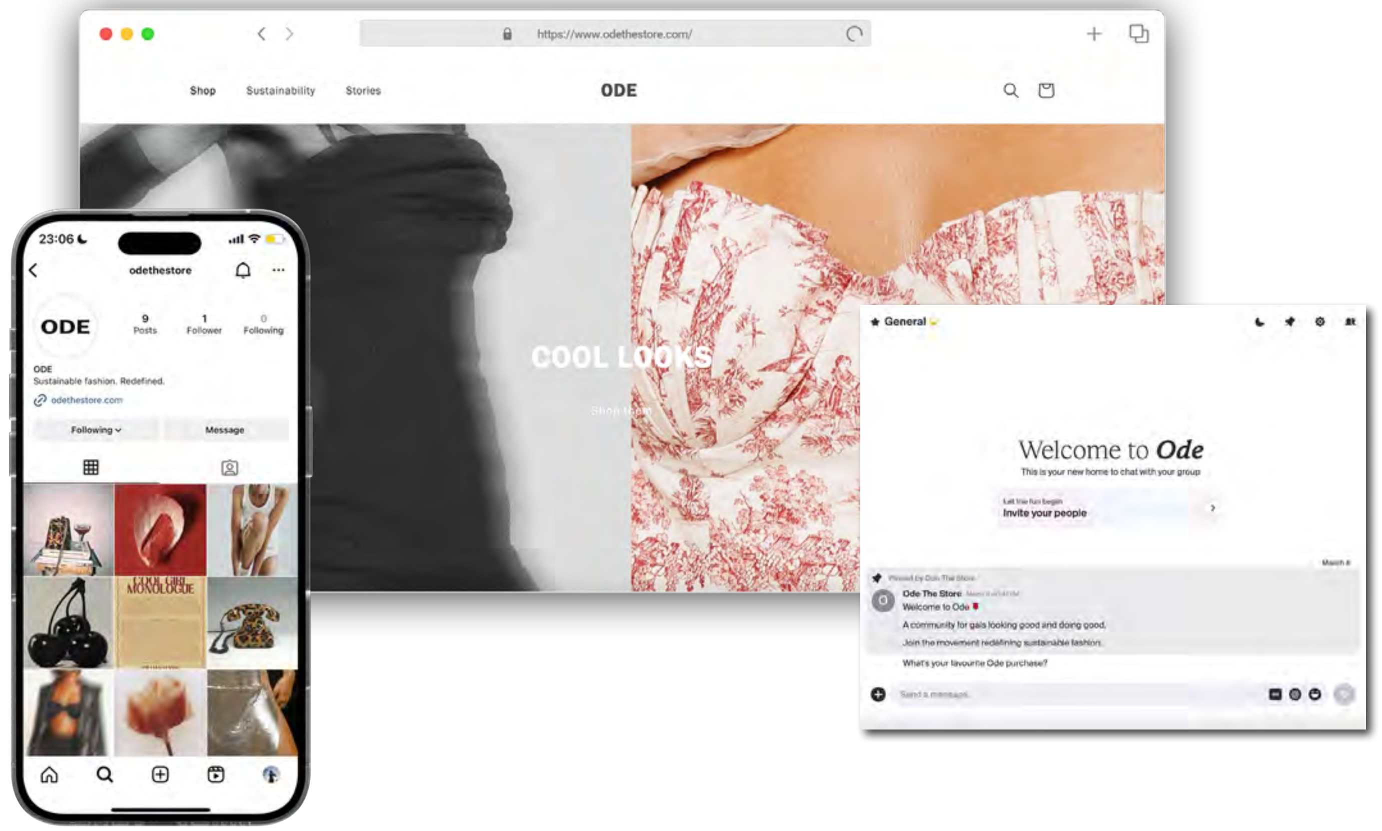
Founder

“Second-hand and eco brands shouldn’t be the only alternative for fashion-forward consumers to make more considered purchases. Ode is an aspirational reflection of my personal self and a vision of a future that has an uncompromising relationship between style and sustainability.

7.6 PROCESS

MARKETING MIX | PROCESS

Consumers will connect with Ode through social media, our website and community platform. Although we are a multi-brand marketplace, all communication and purchasing will be streamlined to create a seamless 'Ode' brand identity and customer experience.



MARKETING MIX | PROCESS

Discovers Ode through social media

Learns about Ode concept on website and Geneva

Makes purchase

Receives access to order tracking portal

Receives order in branded Ode packaging

7.7 PHYSICAL EVIDENCE

MARKETING MIX | PHYSICAL EVIDENCE

Ode will partner with **noissue** for packaging - boxes are **recycled** kraft that is both **recyclable** and **compostable** (noissue, s.d.).

Design will be minimal with brand name, slogan and on-brand phrasing in water-based ink. It is important that our identity as a marketplace is at the forefront of the consumers mind – the only identifiable factor of an individual brand will be garment label and swing tag.

08 SUSTAINABILITY AND ETHICS

RESPONSIBILITY

Ode is dedicated to redefining sustainable fashion and contributing to a better industry, planet and future. Our made-to-order brands **reduce the environmental impacts of overproduction**.

Our charities we support work on a larger scale for a reformed industry. We will **donate 2.5% of our 25% commission** to each brand's choice of charity.

TRANSPARENCY

Ode will be transparent on our sustainability journey through **open and honest communications** about shortcomings and areas for improvement.

Our brands will sign a contract declaring sustainability commitments prior to joining Ode and will be subject to **routine checks and audits.**

FASHION ACT NOW

Clean Clothes Campaign

FASHION TAKES ACTION FTA

GOODLIFE GOALS

(Futerra, 2018)

8 – Decent Work and Economic Growth
Ode gives consumers an opportunity to support small businesses by purchasing from our ethical, independent brands.

12 –Responsible Consumption and Production
Ode champions responsible consumption and production as a made-to-order marketplace.

13 – Climate Action
Our brands combat environmental impacts of overproduction with made-to-order model.

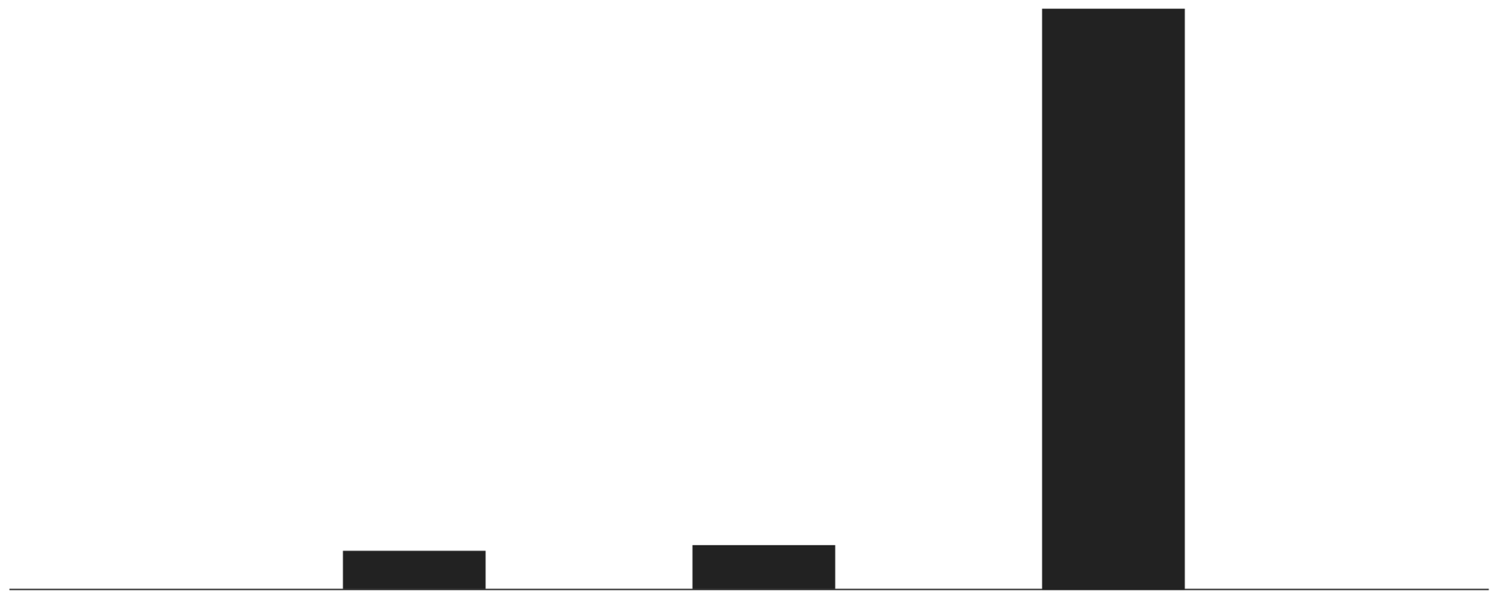
09 FINANCIAL CONSIDERATIONS

FIRST YEAR COSTS

Place - website fees
Variables - photoshoots and packaging
People - Brand Partnerships Executive, part-time E-Commerce Executive, and Performance Marketing & SEO Consultancy. Founder won't take a salary until Y2.

Our most expensive cost in Y1 is people. As a marketplace, we prioritised a Brand Partnerships Executive and an E-Commerce Executive to manage brands and operations. External Performance Marketing, SEO and Social Media agencies were prioritised as crucial early stage growth areas.

For full five year cost breakdown, see Appendix 7.



£3,547 Place
£4,200 Variables
£55,000 People

Total First Year Costs
£62,747

FUNDING

Ode will apply for angel investment from Willow and Lerer Hippeau for initial start-up phase.

Our total requirement will be £150,000 to be paid back in Y5 once we are cash-positive and self-funding.

For full cash flow breakdown, see apendix 7.

FINANCIAL CONSIDERATIONS | FUNDING

willow

LERER HIPPEAU

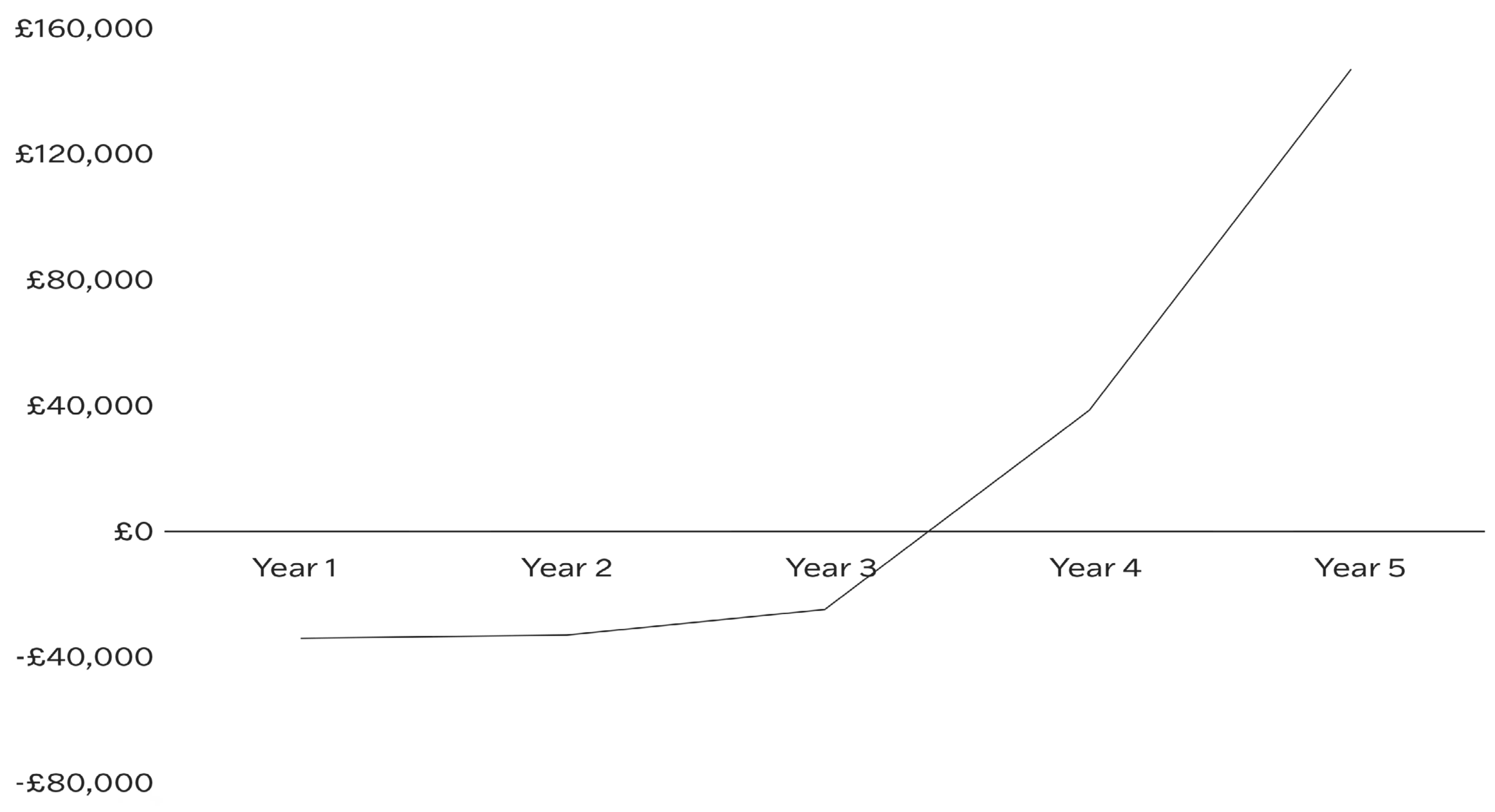
EBITDA FORECAST

Earnings Before Interest, Taxes, Depreciation, and Amortization

Ode is forecast to make a £38,355 profit in Y4 with a net profit margin of 5%. This is forecast to grow significantly to £146,954 in Y5 with a net profit margin of 11%.

For full five year revenue breakdown, see Appendix 7.

FINANCIAL CONSIDERATIONS | EBITDA FORECAST



10 SWOT ANALYSIS

SWOT ANALYSIS

STRENGTHS

Low risk drop ship business model

Forecasted growth of alternative commerce models

Increasing **demand** for authentic and transparent brands

Target consumer's **gravitation towards niche, independent brands**

Gap in the market for fashion-forward, sustainable clothing

WEAKNESSES

Expensive initial start-up costs

High price-point due to sustainable materials and ethical production

Nature of made-to-order brands means **longer lead time** for consumers which could act as a purchase deterrent

Potentially **niche target consumer** (Early Adopters/ Early Majority) with **difficulty to predict broader uptake** (Late Majority/Laggards)

OPPORTUNITIES

Create **own-brand Ode line**

Open brick-and-mortar **showroom**

3D virtual try-on to give consumers greater security before purchasing

Shorten lead times by fronting small-batch bulk orders from brands

THREATS

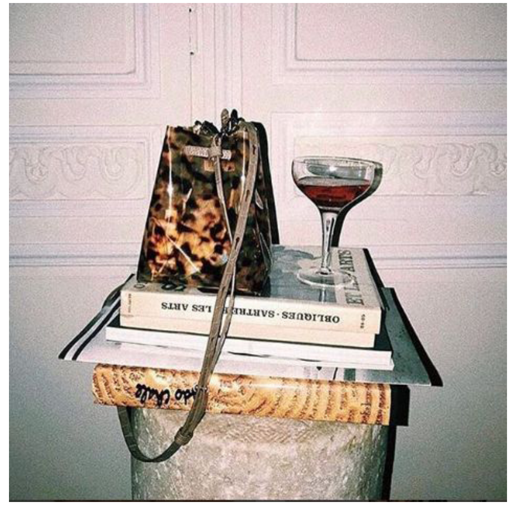
Brands may have **small order capacity** due to combined factors of being small businesses and made-to-order production model

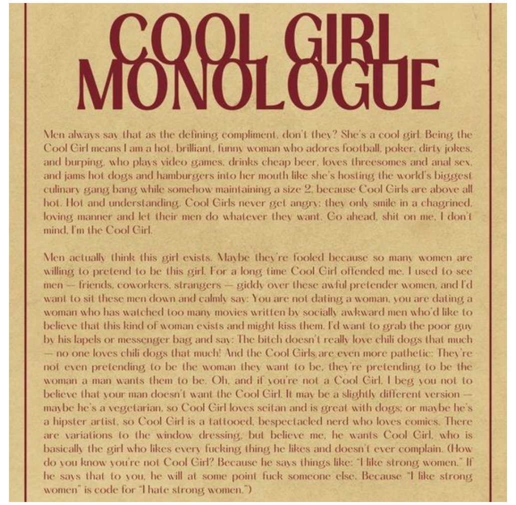
Consumers **purchasing directly** from brands

Slow initial uptake may cause temporary financial pressure

Impacts of **inflation** and recession

11 CONCLUSION AND FUTURE DEVELOPMENTS





COOL GIRL MONOLOGUE

Men always say that as the defining compliment, don't they? She's a cool girl. Being the Cool Girl means I am a hot, brilliant, funny woman who adores football, poker, dirty jokes, and burping, who plays video games, drinks cheap beer, loves threesomes and anal sex, and jams hot dogs and hamburgers into her mouth like she's hosting the world's biggest culinary gang bang while somehow maintaining a size 2, because Cool Girls are above all hot. Hot and understanding. Cool Girls never get angry; they only smile in a chagrined, loving manner and let their men do whatever they want. Go ahead, shit on me, I don't mind, I'm the Cool Girl.

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The proposal for Ode meets the growing demand for **sustainability, individuality** and **community**. Our fashion-forward marketplace of made-to-order brands will redefine sustainable fashion to Gen Z and younger Millennials by demonstrating an **uncompromising relationship between style and sustainability**.

Extensive analysis and evaluation of the global and sustainable fashion markets as well as current competitive landscape indicates a **gap for a marketplace that is both fashion-driven and built around conscious consumption**.

This is further evidenced by consumer insights which demonstrate desire for **transparent, purpose-led brands** and **"climate-friendly consumption choices"** (Young, 2021). Ode's values and brand identity encapsulate these factors, and, bolstered by strong branding and community focus, solidify our unique positioning and connect us to our target consumer.

Ode will explore **future developments** that make the made-to-order model more attractive to younger generations traditionally inclined to immediate gratification. Subject to financial considerations, this could include offering **shorter lead times** to consumers by **fronting small-batch orders** from our brands. Other opportunities include a **physical showroom**, **virtual try-on service** and **own-brand line**.

ODE

Sustainable fashion. Redefined.

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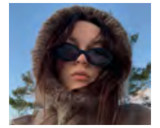
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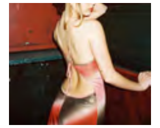
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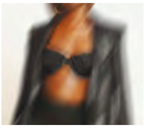
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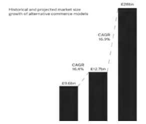
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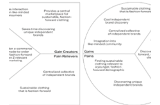
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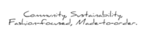
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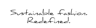
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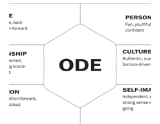
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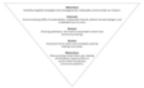
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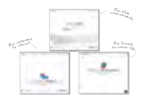
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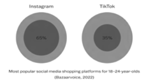
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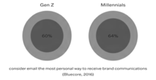
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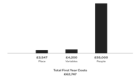

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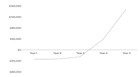

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APPENDICES

Interview I - Ylva Sobakken

Q1 – Based on what you know about Ode and the concept behind it, does the brand and concept appeal?
Stability for smaller sustainable brands, does marketing for them, brand growth & visibility. If brands on there that reflect personal style & values.

Q2 – What aspects draw you in?
Minimal design. Community aspect – informed decision based on sizing. Djerf Avenue example.

Q3 – Is there anything in your world view that make you want to buy from this site?
Added community value. Leading cause to purchase. Very black and white world view.

Q1 – What are your priorities when you buy a new piece of clothing?
i.e. sustainability, style, brand etc
Good quality, good materials, fits within wardrobe/capsule wardrobe. Functional, timeless, good materials, quality. Second hand. Multipurpose.

Q3 – How do you think your belief systems and values shape these priorities?
Studying fashion shaped priorities. From Norway, loves being outdoors. From a colder country makes quality important i.e. wool

Q4 – What makes you connect with a brand?
Not brand loyal. Would never purchase from a brand that doesn't align with values. Responsible.

Q5 – Do you purchase fashion online?
Yes. Prefer to try in-store and buy online – especially at a higher price point.

Q6 – If so, what factors draw you to the brand/platform's website?
i.e. visual, user experience etc
Lured in via social media first. Won't go on website unless social media sells them. Authentic, legitimate. User friendly. Looks good. Easy to use. Accessible information. Djerf Avenue – images of models height & size. Really good size guide. Not e-com imagery, model imagery. Diverse models. Community.

Q7 – What's your income bracket?
Minimal disposable income. Part time job in jewellery store.

Q8 – Do you feel you spend a disproportionate amount of your income on clothes?
It depends on what she needs or wants. Will save up for higher end purchases. More on jewellery than fashion. Tends to shop at a premium price point. Will buy less but more expensive.

Will invest in luxury when salary increases. Won't start spending excessive amounts. Will repurchase current wardrobe in better brands.

Interview II - Courtney Heary

Q1 – Based on what you know about Ode and the concept behind it, does it appeal to you as a consumer?
The genre of brands that she struggles to shop with. An account she would follow but not nec-essarily buy from. Convinced by marketing and branding (studiob-fashion). People will engage all day long based on vibe but question on whether they would cross the line.

Q2 – What aspects draw you in [when shopping with a brand or marketplace]?
In context of marketplace, Studio B, - "an inviting, user-friendly website with a tone of voice that feels very personal. Founder-focused with a strong emphasis on community management. Very interactive, storytelling. Chill tone of voice that balances out price point."

Q3 – Is there anything in your world view/lifestyle that make you want to buy from this site?
Conscious shopper – sells unworn clothes to reinvest in new pieces. Circular shopper. Doesn't shop in excess. Thoughtful choices, not necessarily all sustaina-ble i.e. Arket, COS. Step away from big conversation of sustainability and break down into more accessible on stage of journey. Sustainability rinsed. Responds more to words like conscious, considered, intentional. Dress it up in a different way.

Q1 – What are your priorities when you buy a new piece of clothing?
i.e. sustainability, style, brand etc
Price is number one – must be fairly priced based on quality, notoriety etc. Next, how much wear she'll get out of it. Third, longevity – am I going to get sick of it in a year's time? Fourth, style. Sustainability comes into it through consideration process.

Q2 – How do you think your belief systems and values shape these priorities?
Comfort and dressing a way that makes feel safe. Practical. Work from home most of them time so comfort is a priority.

Q3 – What makes you connect with a brand?
Tone of voice. Authentic, honest. Within personal career mold, big on community manage-ment. Customer service. Customer service is make or break. Ganni store in Covent Garden – quality of customer service and VM makes her want to pur-chase every time.

Geneva – more barriers to purchase, less likely to purchase. Needs to be simple and fuss-free, uncomplicated. Balance between being authentic and realistic. Nice to have and realistic. More time refining customer service then Geneva as a fun extra.

Q4 – Do you purchase fashion online?
Shops online most of the time. 85% online, 15% offline.

Q5 – If so, what factors draw you to a brand/platform's website?
i.e. visual, user experience etc
All to do with practicality and UX. Don't have to dress it up – simple, engaging, airtight, func-tional, loads fast. Visual on many different body shapes and in situ

(IRL). Product pages – clear sizing etc.

Q7 – What's your income bracket?
Less than £50k

Q8 – Do you feel you spend a disproportionate amount of your income on clothes?
No. Very sensible. Decision-making process takes time and is very layered.

Invests in timeless, designer pieces tied to occasions or celebrations i.e. birthday, new job, graduation, Christmas.

Interview III - Fran Sheldon

Q1 – Is sustainability just a product of current trends or here to stay?

We can currently see companies aligning with both perspectives on this. On the one hand there are businesses (typically fast-fashion models) who are following this as you would a trend; monitoring and experimenting whilst maintaining a risk over opportunity approach, and so their response on the issue has been tactical rather than strategic. For these businesses it seems that they have identified the area of development as more customer than shareholder driven and so tend to develop very surface or annexed initiatives whilst maintaining a business-as-usual approach. In contrast, there are the businesses that are leading in sustainable development and so do not see this as a trend but as a purpose which is at the core of their brand, with both customer and shareholder interest that recognises this and aligns which enables these companies to adopt and drive long-term, strategic change

Authenticity, driven by tech advancements is the next challenge in the deepening sustainability journey for brands. So, whilst we can currently observe both attitudes at play in the industry; with mounting pressure legally, behaviourally, and competitively this split cannot continue, and the next decade will be integral to this debate.

Q2 – How can sustainable fashion become a viable alternative to fast fashion for Gen Z consumers?

The research in this area demonstrates that this age group have shown high levels of conversion to the necessary beliefs, motivations and self-efficacy toward sustainable mindsets and awareness which is impressive as it primes this generation to make better choices. The research also shows that price, convenience (incl. easy and free delivery, returns, and access to finance), and social acceptance are still preventing this generation in terms of translating these mindsets into consumption habits. It is worth pointing out that these factors are leading purchase inhibitors for most generations, and especially if we track those generations back to when they were of the same age bracket as Gen Z are now; pre-career establishment, and more susceptible to peer-pressure.

Of the sustainable fashion routes, Second-hand has seen the biggest growth, largely driven by Gen Z. Offering low price point, acceptable convenience levels and the continued ability to buy into trends and labels is clearly the next best option to fast-fashion and mimics the benefits incredibly well. However, with the easy transition to second-hand provided by platforms such as Depop or Vestiaire Collective there is little sign of 'slowing' consumption which is the key to the fashion industry lessening its destructive impact on the planet and society.

The business models that best mimic fast-fashion will show greater transition from fast fashion to alternative models, the greatest impact in terms of social and environmental good will come from the business models that encourage slowness, wellbeing, and individuality to counter the price, convenience and conformity drivers.

Q3 - How can authentically sustainable fashion brands stand out in a sustainability saturated (greenwashed) market?

The biggest differentiator opportunity for authentically sustainable brands is transparency and demonstrating the depth of their approach and actions to customers, enabling them to see and experience their values at work. Alongside transparency these brands should strive for accessibility – removing barriers for transparency and clarity (e.g. lengthy and complicated ESG reports, and using technology to expose the full profuct life0cycle). Also developing co-creation agendas which welcome customers into the brand as creators through personalised and experiential services which sit alongside product to offer further point of difference wth those brands who rely solely on sales over building connection.

Q4 – My concept is an on-demand fashion marketplace (made-to-order fashion brands). How can my concept win over a generation (Gen Z) used to immediate gratification?

Your concept could be promising, and you correctly pin-point instant-gratification as an immediate barrier to address which demonstrates a good opening

knowledge of the issues. I recommend investigating some behavioural science backed service initiatives like Operational transparency, and confirmation bias to learn about some of the ways to alleviate 'waiting' for customers. Techniques like gamification applied to robust and detailed CRM systems could be crucial. Think of when you order something on a food delivery app and how it provides detailed, real-time updates on what is happening. In terms of the manufacture of an item providing detail to the depth of 'Pattern being tailored to your measurements' accompanied by short, sped-up clips of the process taking place will provide operational transparency and transfer the idea of 'waiting' to one of 'experiencing'. It also aligns well with video consumption trends on Pinterest where people like to watch hand-crafts.

Secondly confirmation bias tells us that when we are congratulated for our decisions and reassured, (especially on those bigger decisions like purchasing) we tend to attach a positive feeling to that experience (Also see peak-end theory). This means investing focus on providing post-purchase reassurance and 'good choice!' style communications to reassure and excite your customers about the purchase.

Personalisation and co-creation is another area of interest where customers are welcomed into the process to select details, or interact with their product real-time which intensifies the made-to-measure USP, and if paired with slick, customisation apps can also be a value-added part of the experience.

Interview IV - Cara Bendon

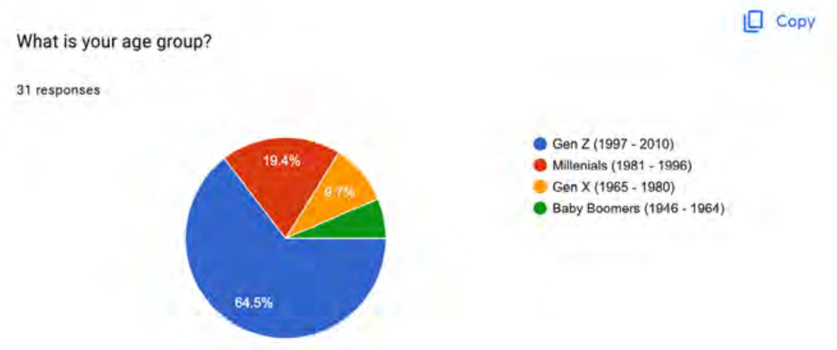
Q1 – How important is strong branding to resonate with Gen Z?
As a generation that prioritises self-expression, aesthetics matter, but they're not always the priority. For example, there has been an increase in 'ugly' design across the graphic, interior and fashion design worlds over recent years – deliberately clashing colours, distorted typogra-phy, unusual shapes and kitsch textures. However, as Andrea Trabucco-Campos observes, this is a statement in itself: a conscious rejection of the traditional rules of design and user experi-ence.

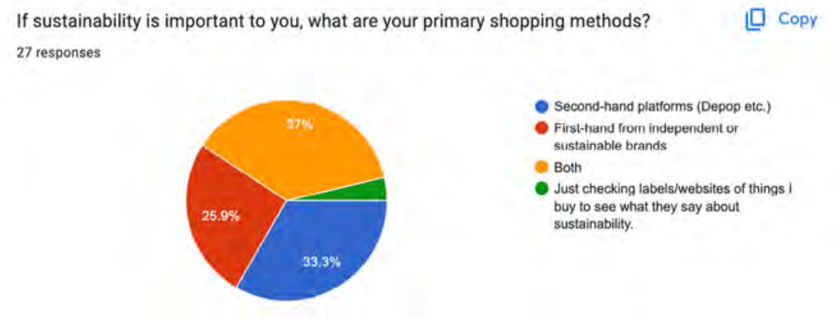
Other brands, such as Stanley (the viral Stanley Cup), Champion and Dickies win the approval of Gen Z for their consistency to their own brands and nostalgic appeal, giving them a cult popu-larity despite their branding remaining unchanged since their heydays.

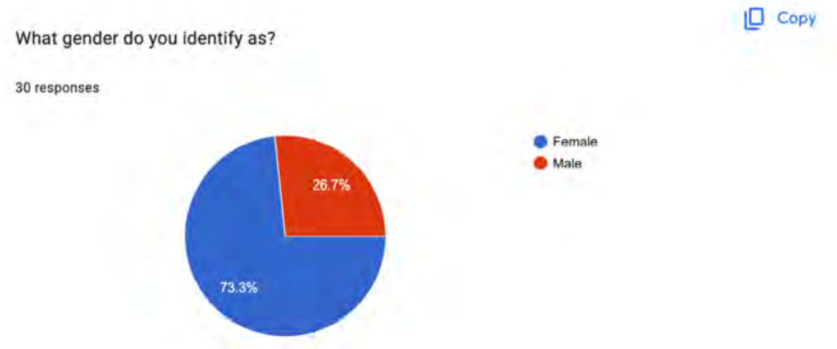
A brand's identity comes through in their visual brand and their language –from the cookie consent banner message to the brand's packaging and everything in-between, and it helps create resonance and connection between the consumer and the brand. Gen Z is a generation whose discourse is playful, non-judgemental, boundary-ques-tioning and knowing, so it is un-surprising that they connect most with brands with identities that reflect these attributes.

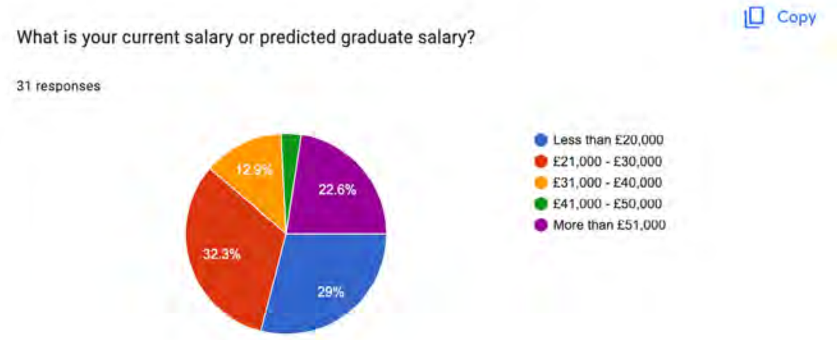
Q2 – Do you think "traditional" sustainable fashion branding is attractive to a young, fashion-forward consumer?
If by 'traditional' sustainable fashion branding, we're talking about the 'hippy' styles where lay-ers of linen, crochet and patchwork are combined, then no, not re-ally. Sustainable wasn't a phrase that was used in the 90's and 2000's, 'eco' was, and it was very much a lifestyle choice rather than the norm. At that time 'Eco' meant leaves, trees, bohemian and tribal motifs, and this was reflected in the (limited) branding they had. These days, however, sustainability is much more assimilated into the mainstream, and into fashion – it's hard to find a brand that uses these 'traditional' green tropes in their branding. Brands such as Ganni, Pangaia and Reformation show that sustainability doesn't have a set look – it can be minimal, sporty, ro-mantic or glamourous. These brands have fairly minimal logos and visual branding, but their brands all have a clear personality, and brand personality is of great importance in connecting with young, fashion-forward consumers.

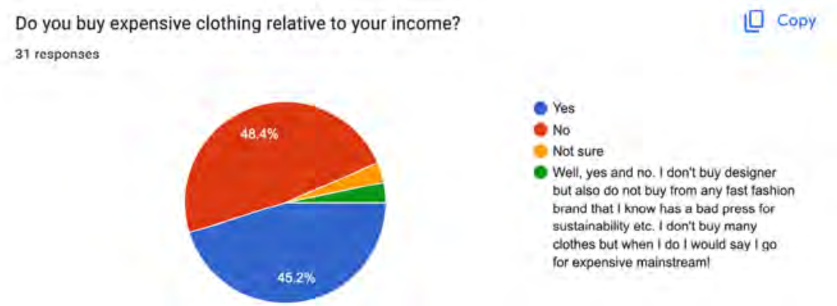
Q5 – Do you think trendy branding and sustainable ideals can authentically co-exist within a fashion brand?
Absolutely. One of the aspects I most like about Gen Z's approach is that they can be playful and ironic with trends, but they do not define them. Gen Z consum-ers understand greenwash-ing and therefore understand that a brand's sustainability comes down to their actions and commitments, not a choice of 'earthy' colour palettes or organic shapes and fonts. The reimag-ining of eco-friendly is something that has been happening over the last 10-15 years, but it is being evolved further with this generation of youth consumers. Brands such as Depop, Gen See, Tala and Byoma, whose brands feature typically 'trendy' character-istics such as bold design, high contrast colours, trendy fonts and even emojis, prove today's consumer has capacity for sustainable brands without stereotypi-cally sustainable branding.











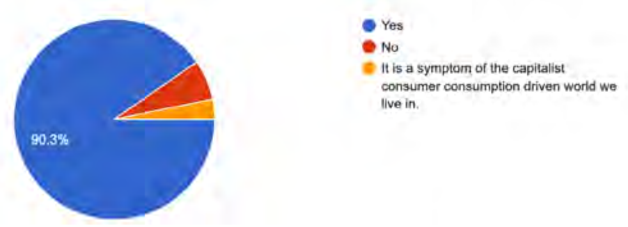
Overproduction is when fashion brands make more clothing than is bought by consumers. Every season an estimated *30% of clothing is never sold* and becomes part of the *rubbish truck worth of clothing* sent to landfill or burned *every second.*

Raturier, S. (2022) Everything You Need to Know About Waste in the Fashion Industry At: https://goodonyou.eco/waste-luxury-fashion/ (Accessed 21/12/2022).

Ellen Macarthur Foundation (2022) Redesigning the Future of Fashion. At: https://ellenmacarthurfoundation.org/topics/fashion/overview (Accessed 09/12/2022).

Do you think this is a problem?

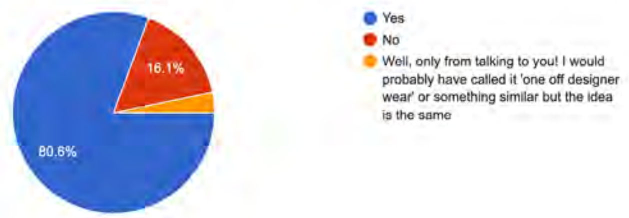
31 responses



Made-to-order fashion is when clothing is only produced in line with consumer demand, reducing overproduction.

Have you heard of made-to-order fashion?

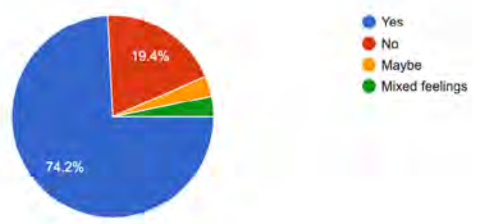
31 responses



Purchasing made-to-order clothing could significantly reduce your carbon footprint.

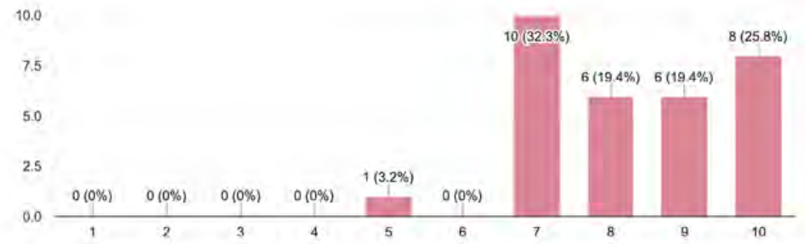
Does this affect your desire to purchase made-to-order fashion?

31 responses

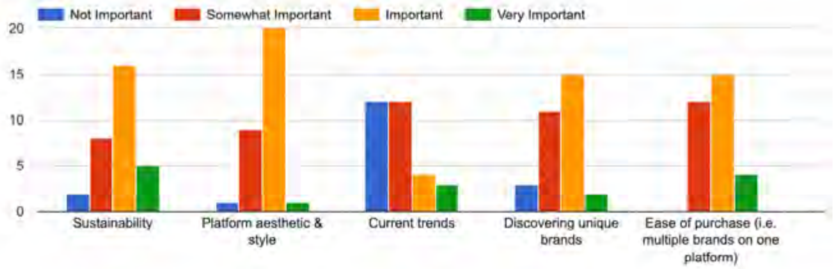


How likely would you be to purchase from an e-commerce platform that brought together independent, made-to-order brands?

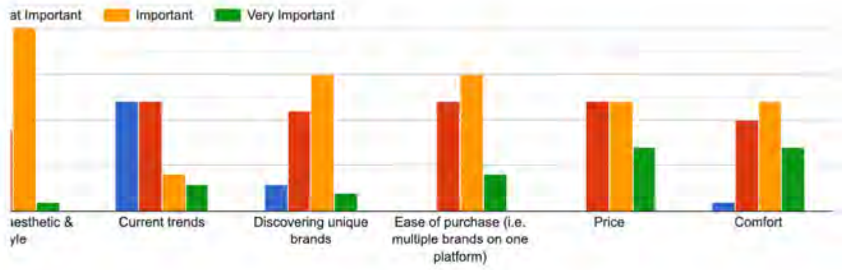
31 responses



If you were to purchase from this platform, rank the importance of the below factors.



If you were to purchase from this platform, rank the importance of the below factors.



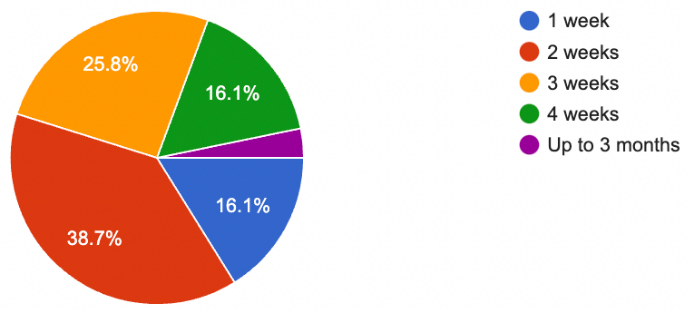
Made-to-order products invariably cost more than high street brands.

If a pair of high-street shoes (i.e. Zara) cost £30, how much more would you be willing to pay for a made-to-order pair of shoes?

31 responses

How long would you be prepared to wait for your made-to-order purchase?

31 responses



ALOHAS

Sustainable leather footwear.

Locally crafted.

BALOU

Retro prints.

Locally crafted.

BEFORE JULY

Feminine silhouettes.

Deadstock & locally crafted.

BELLA VENICE

Bold & sultry.

Deadstock & locally crafted.

CAWLEY

Timeless & contemporary.

Locally crafted.

CHALSIE JOAN

Vintage-inspired.

Locally crafted & founder-run.

FAIT PAR FOUTCH

Sultry & romantic.

Deadstock, locally crafted, founder-run

IDAH

Sultry & romantic.

Deadstock, locally crafted, founder-run.

APPENDICES | APPENDIX 6 - BRANDS

LAAGAM

Contemporary & maximalist.

Locally crafted.

MAISON CLEO

Eclectic & playful.

Deadstock, locally crafted, founder-run.

MIRROR PALAIS

Vintage-inspired & sultry.

Locally crafted.

MOLBY THE LABEL

Playful & feminine.

Locally crafted & founder-run.

MURLONG CRES

Vintage-inspired & feminine.

Locally crafted & founder-run.

OLIVIA ROSE

Timeless & feminine.

Locally crafted & founder-run.

STHR STUDIOS

Timeless & feminine.

Locally crafted & founder-run.

WORME

Minimalist silk designs.

Locally crafted.

COST BREAKDOWN	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Website	**£3,547**	**£1,297**	**£11,297**	**£1,297**	**£1,297**
Theme	£250		£10,000		
Shopify Expert	£2,000				
Shopify Membership	£588	£588	£588	£588	£588
Charle Shopify Agency	£709	£709	£709	£709	£709
People	**£46,000**	**£75,600**	**£101,600**	**£126,600**	**£148,600**
Founder		£18,000	£24,000	£36,000	£50,000
E-Commerce Executive	£6,000	£8,000	£22,500	£27,500	£30,000
Brand Partnerships Executive	£22,000	£25,000	£27,500	£32,500	£35,000
Performance Marketing Consultancy	£9,000	£9,000	£9,000	£9,000	£9,000
SEO Consultancy		£3,600	£3,600	£3,600	£3,600
Ad Spend	£9,000	£12,000	£15,000	£18,000	£21,000
General Business Costs	**£9,000**	**£9,000**	**£9,000**	**£9,000**	**£9,000**

Variable	**£4,200**	**£7,200**	**£11,700**	**£19,200**	**£31,200**
Packaging	£3,000	£6,000	£10,500	£18,000	£30,000
Photoshoots	£1,200	£1,200	£1,200	£1,200	£1,200

TOTAL COSTS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Total Fixed Costs	£58,547	£85,897	£121,897	£136,897	£158,897
Total Variable Costs	£4,200	£7,200	£11,700	£19,200	£31,200
	£62,747	**£93,097**	**£133,597**	**£156,097**	**£190,097**

For the first year, we will create the initial website with a free Shopify theme – Dawn. We will work with a Shopify agency to optimize the theme and get the most out of it possible.

In Q3, we will purchase the Shopify Palo Alto theme for approximately £250. We will hire a Shopify Expert to customize the theme to suit our design aesthetic, this will be a once off fee of approximately £2,000. Charle is a Shopify support agency who we will keep on monthly retainer for design, development and general e-commerce support. This will cost an estimated £709 per month.

REVENUE BREAKDOWN					
REVENUE STREAMS	**YEAR 1**	**YEAR 2**	**YEAR 3**	**YEAR 4**	**YEAR 5**
Number Of Brands	16	21	26	31	41
Avg. Revenue Per Product	£197	£205	£213	£222	£230
Products Sold/Month	50	100	175	300	500
Gross Revenue	£118,200	£245,856	£447,458	£797,754	£1,382,773
25% Commission	£29,550	£61,464	£111,864	£199,438	£345,693
2.5% Donation	-£739	-£1,537	-£2,797	-£4,986	-£8,642
Net Revenue	£28,811	£59,927	£109,068	£194,452	£337,051

P&L BREAKDOWN					
	YEAR 1	**YEAR 2**	**YEAR 3**	**YEAR 4**	**YEAR 5**
Net Revenue	£28,811	£59,927	£109,068	£194,452	£337,051
Total Costs	£62,747	£93,097	£133,597	£156,097	£190,097
EBITDA	-£33,936	-£33,170	-£24,529	£38,355	£146,954

CASHFLOW TABLE					
Opening Balance	£0	£116,064	£82,895	£58,366	£96,721
Income	£28,811	£59,927	£109,068	£194,452	£337,051
Expenses	-£62,747	-£93,097	-£133,597	-£156,097	-£190,097
Funding	£150,000				-£150,000
Cash Position	£116,064	£82,895	£58,366	£96,721	£93,675

SUMMARY					
PRODUCT	**YEAR 1**	**YEAR 2**	**YEAR 3**	**YEAR 4**	**YEAR 5**
Number Of Brands	16	21	26	31	41
Products Sold/Month	50	100	175	300	500
Units per Brand	3.1	4.8	6.7	9.7	12.2
FINANCE	**YEAR 1**	**YEAR 2**	**YEAR 3**	**YEAR 4**	**YEAR 5**
Gross Revenue	£118,200	£245,856	£447,458	£797,754	£1,382,773
Net Revenue	£28,811	£59,927	£109,068	£194,452	£337,051
Total Costs	£62,747	£93,097	£133,597	£156,097	£190,097
EBITDA	-£33,936	-£33,170	-£24,529	£38,355	£146,954
Net Profit Margin	-29%	-13%	-5%	5%	11%

We will start with 16 brands in Year 1 and build up our portfolio YoY. The average revenue per product of £197 has been calculated based off of a similar blouse from each brand - this will increase 2% YoY in accordance with inflation.

Our sole revenue driver is 25% commission from each product sold minus 2.5% which will be donated to the brand's charity of choice.

We will require a £150,000 cash injection in Y1 which we will pay back in Y5.

ODE AVERAGE PRICE OF BLOUSE	
Alohas	£100
Balou	£325
Before July	£80
Bella Venice	£72
Cawley	£320
Chalsie Joan	£250
Fait Par Foutch	£208
Idah	£135
Laagam	£75
Maison Cleo	£220
Mirror Palais	£395
Molby The Label	£130
Murlong Cres	£117
Olivia Rose	£180
Sthr Studios	£299
Worme	£250
AVG	**£197**

To establish an average unit price, we found a universally similar item from each brand averaged out the listed retail price.

SEGMENTATION

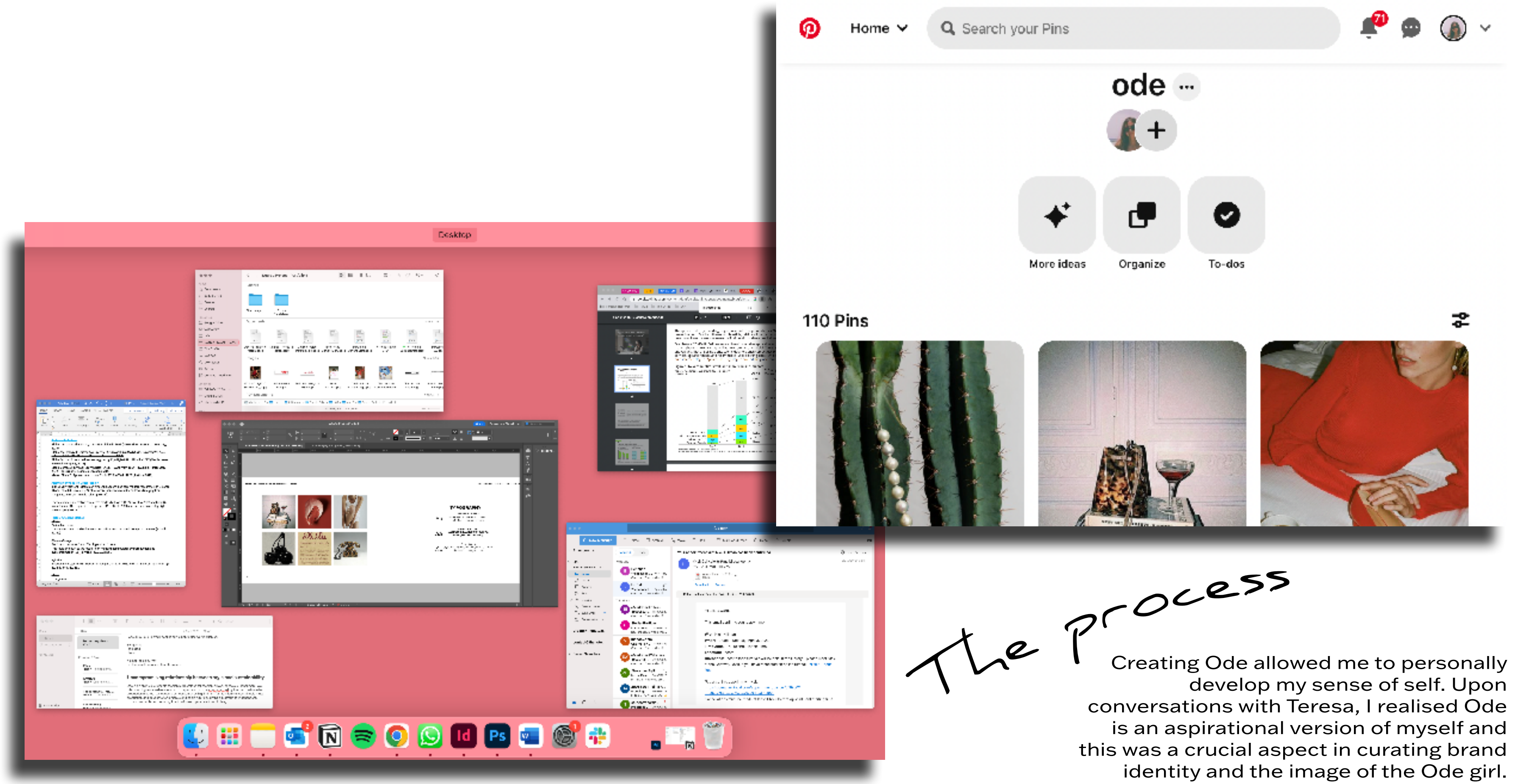
Fashion-driven Gen Z and Millennials who prioritize considered consumption and independent brands. They value uniqueness and individuality and are interested in creativity and self-expression. In their spare time, they enjoy going to markets and exploring their local area with friends, trying out wellness trends and social media. They commonly reside in capital cities or towns – be it urban or beach-side.

TARGETING

To successfully target these segments, we will communicate with a fun and relatable tone of voice across our sales and marketing channels. We will prioritize social media engagement by capitalizing on TikTok trends and using Instagram for interactive as well as informative posts and stories. In doing so, we will ensure that Ode's brand DNA is aligned with this demographic but remains unique and identifiable.

POSITIONING

Ode is positioned as an online fashion marketplace that is both sustainable and fashion-forward. It offers fashion-driven consumers a way to shop on-trend clothing whilst still practicing conscious consumption.



The process

Creating Ode allowed me to personally develop my sense of self. Upon conversations with Teresa, I realised Ode is an aspirational version of myself and this was a crucial aspect in curating brand identity and the image of the Ode girl.

GIBBS' REFLECTIVE CYCLE

(Gibbs, 1988)

Description

I created a brand proposal for Ode - a made-to-order fashion e-commerce marketplace redefining sustainable fashion to younger generations.

Feelings

I approached this project with aprehension - excited to produce something entirely my own but daunted by coming up with the concept. Looking back I feel a sense of pride at what I accomplished from nothing.

Evaluation

Approaching this project as I would any other helped to avoid stress and overwhelm. When I was feeling creative I focused on branding and when I was feeling more pragmatic I executed tasks like financials. This worked really well for me and helped my assignment go smoothly.

Conclusions

Ode evolved as I worked on it - starting as an independent brand incubator and becoming a marketplace. This taught me to lean into the unknown and go with the creative development of an idea rather than be put off by pivots and blank spaces.

Action Plan

If I were to start this project again, I would create a prioritised list and structure it based on time and capacity. By visualising what I could accomplish, I might have had more time to complete a mini version of my website.