

oh
POLLY

Business Case Study

Candidate Number: 12832



UNIVERSITY OF
BATH

Section 1: What

Oh Polly are a UK based online women's fashion retailer primarily focused on "proving trend-driven high-quality products from ethical supply chains that will turn heads and get you noticed" (1). Oh Polly grew from charitable foundations with its owners Claire Henderson and Mike Branney, initially selling items on eBay while studying engineering at university in 2013, to fund their Cambodia based charity, 'The Brannerson Foundation' (2). The Oh Polly website and brand were established following their eBay success in 2015 (3). The most recently available financial records indicate Oh Polly doubled their turnover from 2019 to 2020 to £39.1 million, with orders increasing by 78.7% (4). This trend is expected to be replicated in the financial data for 2021 due to their growing social channels, product expansion and advertising investment (5). While positioned within the fast fashion industry, Oh Polly provides unique, high-quality items using their internal design team and self-owned factories to offer over 1300 clothing items (6).



Figure 1: Examples of Oh Polly Products, from left to right: Rancho Mirage - Oh Polly (8), Reasmey - Neena Swim (32), Accelerate - Bo and Tee (49), and a mix - Oh Polly

Oh Polly's sales are completed online via their own website or app, with no third-party retailers stocking their items, allowing them to have complete control over their products. Oh Polly has been able to dispatch over 1.8 million orders internationally in 2021 alone (7). Oh Polly is also heavily dependent on social media, particularly Instagram, to promote its products. However, this has been a successful approach as Oh Polly has seen rapid growth since its formation, accumulating over 6.1 million followers in 6 years over its four accounts (Oh Polly, Bo+Tee, Neena Swim and Shoes by Oh Polly). This resulted in Oh Polly being featured 13th in the 2020 Sunday Times's Fast Track 100 List (8). Since starting, Oh Polly has adapted to the market and expanded its range from occasionwear to shoes, swimwear, and athleisure (4). Oh Polly's products use premium fabrics, and prices range from £15 for a pair of sports leggings to £60 for an embellished skirt.

6.1M

Followers on Instagram

1.8M

Orders in 2021

39.1M

Total sales 2019-2020

Figure 2: Summary of Oh Polly's key statistics

Section 2: Why

Target Demographic

Oh Polly targets young fashion-conscious female customers aged between 16 and 34 (9). These customers are sensitive to changing fashion trends, want to be noticed and are influenced by social media. As a result, Oh Polly regularly updates their merchandise, releasing 34 collections during 2021 (7), and relying heavily on online marketing campaigns to attract customers. Oh Polly recognises that their target demographic comes in all shapes and sizes and provides an extensive range of sizes on all products to accommodate this and promote diversity, rather than offering separate clothing lines, like competitors, which can exclude buyers (10). Oh Polly are also aware that many of their target customers are students and offer a 15% student discount on many of their items to encourage purchases by those with a lower income. Finally, Oh Polly understands that their target demographic is up-to-date with technology, with over 50% purchasing products via their mobile device (11). As a result, Oh Polly has developed an app to bring their products to this audience directly.

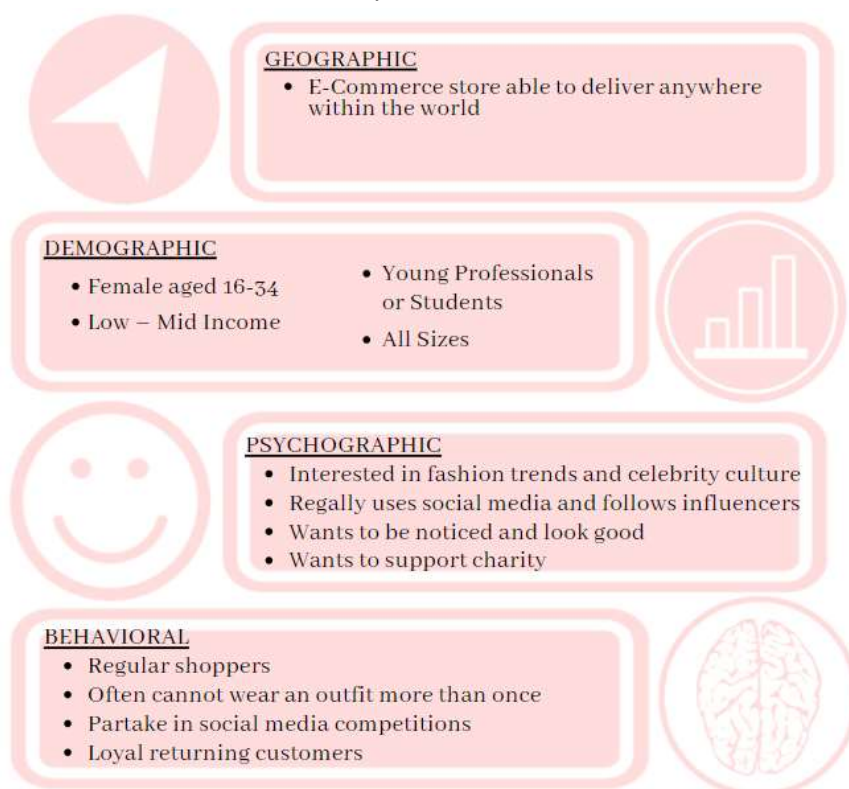


Figure 3: Market Segmentation of Oh Polly

UK Fashion Market

The UK fashion market is worth an estimated £56 billion (12). Pre-pandemic year on year industry growth was rapid at 14.2% (13), making fashion an attractive market. However, industry profits fell by 93% in 2020 but have steadily recovered to 103% of 2019 levels (14). Despite this, Oh Polly was able to grow throughout the pandemic by repositioning themselves both within the outerwear and sportswear market. The introduction of stylish, well-fitted sportswear in 2020 under the brand Bo+Tee was a successful move for Oh Polly. The brand accumulated over 1 million followers and hit 8 figure revenues within its first 12 months of trading (3). By diversifying their product range, Oh Polly stood out from their competitors, supplied their customers' changing needs and established security within a turbulent market.

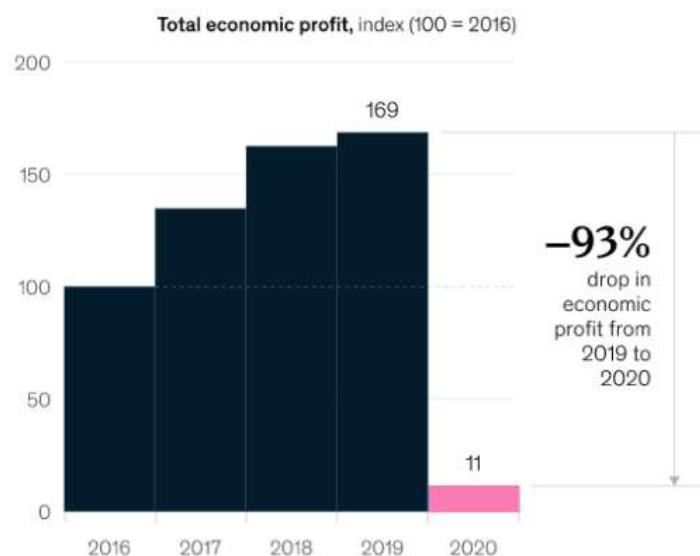


Figure 4: Global Fashion Industry year on year profit in comparison to 2016 (14)

Online Vs Traditional Sales

E-commerce sales account for 36% of all retail sales in the UK (15). As a result of the 2020 pandemic, the consumer shift to online shopping has accelerated, with growth of 29.6% (16). Approximately 50% of European consumers have shopped less in physical stores since the pandemic began (17). While convenient, online shopping has the disadvantage that consumers cannot try on items before purchase, with almost half of UK online shoppers needing to send an unsuitable purchase back in the past year (18). However, with the development of cheaper next-day delivery services and a reduction in the number of high-street stores, online sales are expected to increase to 53% by 2028 (19).

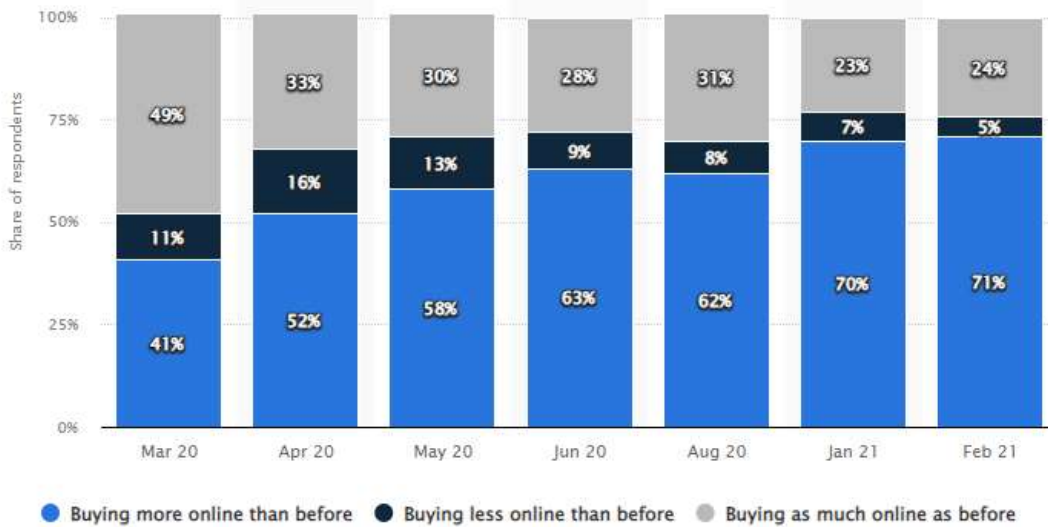


Figure 5: Change in online purchases due to the coronavirus (COVID-19) pandemic in the United Kingdom from March 2020-February 2021 (19)

Fast Fashion

Fast fashion is defined as inexpensive clothing produced rapidly by mass-market retailers in response to the latest trends (20). Fast fashion has benefitted consumers by transforming the market, focusing on simplicity, convenience, accessibility, and affordability. Approximately 21% of consumers listed low price as their top reason for purchasing an item, with quality as a close second factor among 15% of consumers. Oh Polly sits within the middle of the fast fashion market with an average dress price of £42.00, as demonstrated in figure 5.



Figure 6: Comparison of multiple fast fashion brands

Competition

Although lucrative, the fast fashion market is severely over-saturated. With huge fashion brands such as Zara, PrettyLittleThing (PLT) and H&M competing for the same target market. Oh Polly's biggest competitor is House Of CB, a women's outwear brand that operates online and through a handful of stores within the UK (21). Their products are incredibly similar, as demonstrated in **figure 7**. However, Oh Polly's prices are significantly lower, with a £97 price difference on a matching black maxi dress. Other competitors, like PLT and I Saw It First, can reduce their prices further than Oh Polly and offer hundreds of new products daily through wholesale purchases (22). However, product quality is compromised as a result, and often items cannot be worn more than once, resulting in customer dissatisfaction (23). Oh Polly stands out by controlling most of their garment manufacture, providing customers with high-quality items designed to be re-worn, resulting in better value for money (1). While Oh Polly's internal design and manufacturing process takes longer than some of their competitors, it has worked to their advantage, finding the right balance between meeting their customers' needs and preventing oversaturation and appearing unsustainable in their practices. Consumers' attitudes are changing towards fast fashion, mainly due to its social and environmental consequences, and they often feel guilty after impulsively purchasing clothes (24).



Figure 7: Examples of clothing by Oh Polly (left) £42.00, and House of CB (right) £139.00

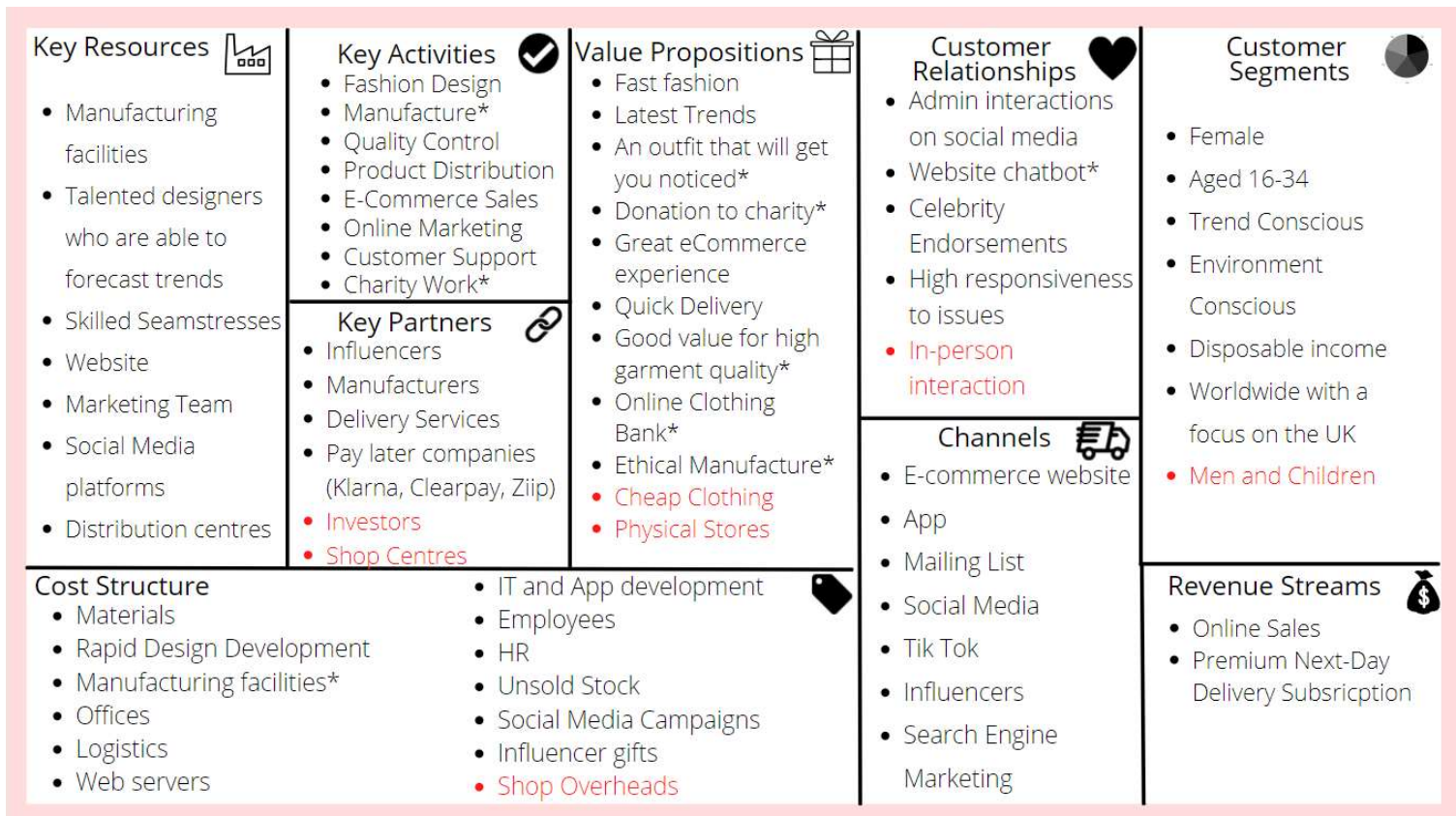


Figure 8: Business Model Canvas, points highlighted by a '*' is something unique to Oh Polly, those in red is something Oh Polly's competitors do but Oh Polly does not

Section 3: How

A business model canvas was used to analyse Oh Polly's business model in detail, **Figure 7**. This model considered Oh Polly and its close competitors to gain a greater industry understanding. The items highlighted by a '*' are unique to Oh Polly, while items highlighted in red are something Oh Polly's competitors do, but Oh Polly does not. Oh Polly's key focuses are outlined below:

Cost Structure

Oh Polly's operation as an E-commerce company is a crucial cost-saving factor. Rent alone for physical stores can often account for 25 to 40 percent of operational expenses (17), staff would also need to be employed to work in-store seven days a week, and trading hours would be limited. By operating online, Oh Polly can reach a larger market geographically, and their consumers can purchase items at times that are convenient to them. These lower overheads free up more money for advertising and product/platform investment.



Values

A key differentiating factor between Oh Polly and its competitors is its commitment to charity. Oh Polly donates a percentage of their profits to the Brannerson Foundation, which support communities in Southeast Asia to advance education by running free English language schools, offering grants, and providing health care products (1). Over \$600,000 has been donated so far (3). Oh Polly has also supported charities within the UK, such as The Martin Gallier Project associated with World Suicide Prevention Day (25).



Oh Polly also differentiates itself through ethical manufacturing practices. Oh Polly owns over 50% of its manufacturing facilities, where they have complete control over their workers' safety and wages (1). Oh Polly creates a safe and beneficial environment for their workers through profit sharing, free healthcare consultations, and

providing accommodation for the first six months of employment (26). Oh Polly's tagline 'For Girls. By Girls' is also supported by promoting senior female leadership in their factories, particularly in countries where women in managerial positions are rare (27).



Oh Polly's ethical values are also mirrored in their environmental policies. Oh Polly have fitted their UK offices with solar panels and anaerobic digestion generators (28) and provides biodegradable packing (26). Oh Polly also reinforces the re-use attitude by producing quality, durable garments designed to be worn more than once and offers directions to secondhand clothing shops such as Depop (26). Finally, Oh Polly has established a donation service with the Salvation Army. Customers are encouraged to send six clothing items free of charge through Oh Polly's postal service in exchange for a discount code (29).

Customer Relationship

Oh Polly's business plan relies heavily on social media, specifically Instagram and Tik Tok, to create a strong customer relationship. Oh Polly regularly engages with their customers through comment replies, direct messages and Q and As. Oh Polly can react to brand criticism or customer problems quickly through social media, with a dedicated customer support profile 'ohpollyhelp'. Oh Polly's tone of voice on their posts is also upbeat and fun, appearing to sound like their target demographic, attracting a greater audience and creating a positive brand image. Oh Polly's regular outreach has enabled them to be ranked as the 5th most engaged UK clothing retail social media brand (1). Finally, unlike its competition, Oh Polly offer a live-chat bot on its website to help with common customer queries.



Section 4: Strategy

Oh Polly's vision is to 'provide trend-driven high-quality products from ethical supply chains that will turn heads and get customers noticed' (1). To achieve this, two fundamental problems need to be addressed:

PROBLEM Perceptions towards fast fashion are changing, with consumers recognising that fast fashion has a devastating environmental impact, typically relies on unethical manufacturing processes, and produces low-quality clothing. Two-thirds of consumers indicated they would stop or significantly reduce their spending with brands who mistreat their employees or suppliers (17).

POLICY While operating as a fast-fashion business, Oh Polly seeks to distance themselves from the fast-fashion label. Despite having the infrastructure to get a product on sale within seven days, Oh Polly's typical turnaround is 24 days to ensure products are not rushed, and quality is monitored (30). Oh Polly also actively 'protects the people that work in their factories' (26).

ACTIONS

- Oh Polly's mission is to raise money for their charity, the Brannerson Foundation
- Oh Polly are vertically integrated. They own most of their factories, hire talented staff and can directly control conditions
- Workers are incentivised through profit sharing and good working conditions
- Oh Polly design all of their items in-house rather than through wholesale, providing greater quality control and manufacturing responsibility
- Every product is carefully inspected using the international AQL2.5 standard (26)
- Rather than offering new items daily, Oh Polly often ties releases to new seasons or events such as Christmas, Valentine's, Spring, Summer swim, Summer festivals
- Oh Polly offers a sustainable clothing donation service to the Salvation Army
- Oh Polly's higher average prices allow them to use higher quality materials and pay their worker's fair wages
- Oh Polly supports their tagline 'For Girls. By Girls' with 70% of Oh Polly's global senior management positions held by women (31).

PROBLEM The womenswear market is oversaturated, with hundreds of online stores targeting the same audience, making it difficult to stand out.

POLICY Oh Polly applies a 'social first' business model (32). Its sales are driven by its social media presence, with its target demographic making up nearly two-thirds of all users on Instagram (33). Oh Polly acts as a leader with distinguishable creative content (34) and continuously contacts their customers to stay relevant and provide the best experience possible.

ACTIONS

- Oh Polly admin are in continuous contact with their customers in all social media forms, averaging 5 Instagram posts, 5 Tweets, 9 Facebook posts and 1 Tik Tok a day. These posts can be divided into advertisements, competitions and 'relatable content'. Customers are encouraged to interact with posts with Oh Polly responding like a friend, **figure 9**.



Figure 9: Examples of Oh Polly's interactions on Instagram 03/04/22

- Oh Polly runs a significant number of competitions through their social media, where winners can win a range of prizes from an item of clothing, an entire collection to a cash prize or a luxury holiday. These daily competitions require participants to tag friends and share to their own social media profiles, increasing the visibility of Oh Polly and driving sales.
- Oh Polly's states they are 'the place that everyone turns to when buying something a that's little bit extra' (1). This indicates their USP - their products are designed to get their customers noticed. As a result, many customers share photos of themselves wearing Oh Polly on social media.
- Oh Polly, unlike their competitors, also ships their products in pink boxes. This added touch reinforces the idea that their clothing is premium, improving the overall customer experience and encouraging customers to share when their deliveries arrive, **figure 10**.
- Overall, Oh Polly have created a culture where customers recommend and share their brand through their own social media. This allows Oh Polly to direct funds that may have been used for additional advertising to create quality organic content and pay brand ambassadors.
- Oh Polly also ensures they understand their target market by hiring creatives that represent their target customer or people who can adapt to their target customer (34).
- Oh Polly are able to gain a following and then rebrand to ensure that they keep that following. For example, in 2021, Oh Polly rebranded their swimwear, Oh Polly Swim, to 'NEENA' (7). The brand title has no direct link to swimwear and could be difficult for customers to find had they not already been following their Oh Polly Swim pages which subsequently changed names.
- Finally, Oh Polly stands out by hosting several yearly events designed to recognise the achievements of women within the fashion industry and educate/inspire their audience. Oh Polly's founder, Clare Henderson, has a master's in aerospace engineering and, as a woman in business, wants to inspire and encourage the next generation (35).



Figure 10: Pink packaging boxes used by Oh Polly

SWOT analysis was performed to aid strategy identification and understand what threats Oh Polly would need to avoid strategically:

S	<ul style="list-style-type: none"> • Social Media growth and outreach • High Quality Product • Charitable Associations • Internal ethical manufacture • Customer advertising 	<ul style="list-style-type: none"> • Skilled Labour Force • Not a public company • Sustainable offices and donation scheme
W	<ul style="list-style-type: none"> • Relies on correct trend forecasting • Slower to output designs than others • No identifiable face of the brand 	<ul style="list-style-type: none"> • Concentrated market • Damaged Stock • Limited use of plus-size models • Higher average price
O	<ul style="list-style-type: none"> • Accessories • Subscription Service • Re-Sale • Growth of online sales, particularly through social media apps like Instagram • Use of artificial intelligence to personalise customer experience 	
T	<ul style="list-style-type: none"> • Material Shortage • Market Saturation • Future 'lock downs' • Rising costs of raw material 	

Figure 11: SWOT Analysis of Oh Polly

Section 5: Critique

In order to grow, Oh Polly can implement different strategies to solve problems and create opportunities. Methods have been devised using the SWOT analysis in figure 11 and the research required to complete sections 1-4.

Re-usability

While Oh Polly encourages the re-use, re-sale, and donation of their garments, they do not facilitate it. The secondhand market is expected to out-grow and double the fast fashion market by 2030 (36), with 3 in 10 women having purchased secondhand garments in the last 12 months (37). Websites used for buying and selling secondhand clothing, such as Depop and Vinted, charge a 10% commission and currently have nearly 200,000 items listed under 'Oh Polly' available for sale. The logical next step for Oh Polly would be to establish a secondhand customer clothing recycling system at a lower commission rate, to allow customers to give their used items a new home.

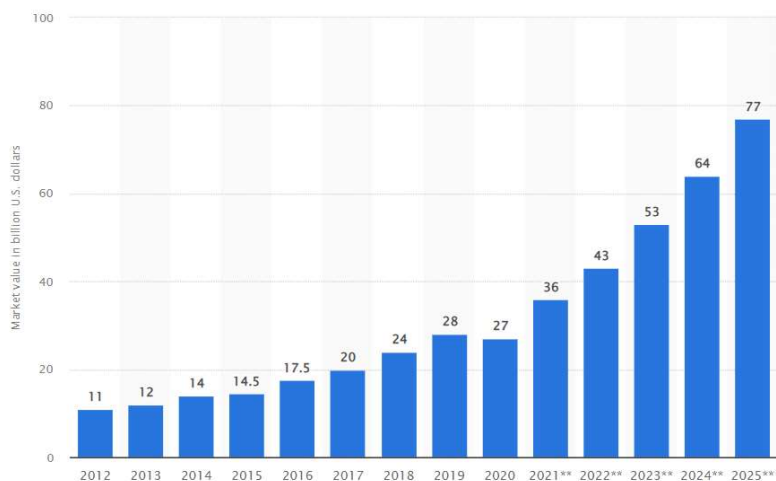


Figure 12: Secondhand apparel market value worldwide from 2012 to 2025 in Billion US dollars

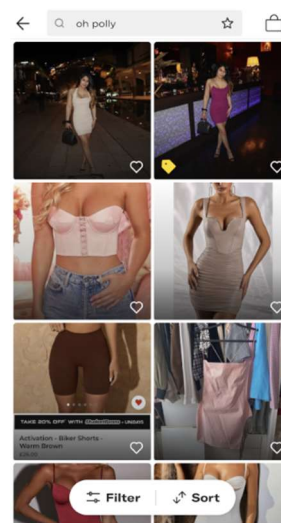


Figure 133: Oh Polly on Depop

Another opportunity would be to sell items with minor defects at a lower price through a separate page on their website. The footwear brands Schuh and Office already implement this successfully through 'Shuch Imperfects' and 'Offcuts', with photos and descriptions of the exact items available to purchase. This would help Oh Polly achieve their aim of reducing the number of damaged return garments going to landfill by 50% (26) and would open the market for customers with a lower budget that can overlook minor blemishes to become an Oh Polly girl.

Use of Technology

Consumers are more commonly paralysed by the vast selection of clothing items available (38). To help consumers navigate its website, Oh Polly should make the most of the consumer information gathered to personalise the customer shopping experience and respond to the changing needs of their customers with products highlighted based on insights into their preferences. 6 in 10 young consumers say they want their shopping experience to be specific to them (39). Companies such as Fabletics, Savage X Fenty and Sweaty Betty are already accommodating these needs using a short customer survey. Oh Polly could replicate this and use rewards such as early product access or discount codes to incentivise customers to share more data being transparent about the benefits to both parties, with consumers receiving lightning-fast relevant product suggestions. According to existing trials using AI personalisation technology, shoppers are 44% more likely to make a purchase. Their average order value has increased by 7%, and abandoned shopping carts were reduced by 3% (40). Technology can also be implemented to reduce waste and improve inventory management. Inventory can be stocked according to consumers' preferences through predictive modelling software with 95% accuracy (41).

44% More likely to make a purchase

7% Increase in order value

3% Less likely to abandon shopping carts

An identifiable influencer

Oh Polly collaborated with five influencers during 2021 (7). However, these influencers have an average individual following of 1.2m. Unlike competitors, Oh Polly does not have a face of the brand, PLT have Molly Mae, I Saw it First has Lucinda Strafford and In The Style has Liberty Poole. A direct association with a key influencer will help with brand identification, leverage an influencer's audience and enrich content (42). An example of an influencer Oh Polly could approach to organise a collection collaboration with is Khloe Kardashian. While Khloe has a significantly more significant following than influencers Oh Polly have worked with before (231m), Khloe is regularly seen wearing Bo+Tee, indicating she likes the brand (43). Her audience also contains Oh Polly's target market.

Oh Polly should also use a greater range of models in their social media content. The average woman in the UK is a size 16 (44). While Oh Polly stock sizes up to 18, this is not clear on their social feed where the same type of tall, slim models are displayed, off-putting potential customers. This could be supported through Oh Polly's 'as styled by you' feature on its website. At the moment, this feature only shows photos of models and influencers wearing Oh Polly. This could change to display customers styling their favourite outfits, promoting diversity and inclusion, reinforcing the message no one size fits all and furthering customer engagement.



Figure 14: Khloe Kardashian pictured in Boo+Tee (43)

Promotion of Core Values

While Oh Polly's ethical core values help them stand out from their competition, Oh Polly does not actively promote these values on any social channels. A third of consumers now choose to buy from brands they believe are doing social or environmental good (45), and 69% of shoppers wish to know more about how their clothes were manufactured (46). A BBC Panorama investigation found that workers were not making minimum wage in several Leicester factories in the UK, used by many of Oh Polly's competitors, with some working in unsafe conditions during the COVID pandemic (47). As a result, Oh Polly should actively discuss their manufacturing methods and charity work on their social channels or hosted events, demonstrating their core values and improving consumer trust.



Subscription Service

The subscription-based sales model of charging a customer a fixed monthly fee in exchange for products or services has dominated the entertainment industry over the past few years, with the UK spending over £2 billion every year (48). This model has started to be implemented within the fashion industry through companies such as Fabletics and Savage X Fenty. However, it has yet to take off fully. One option for Oh Polly is an influencer paired clothing subscription where paid celebrities and influencers can choose their favourite styles or work with Oh Polly to create a new design every month with customers subscribing to receive them. This would provide Oh Polly with a regular revenue stream and access to their chosen influencers' fan base – further promoting their brand.



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