

YONDER

The Future of Fashion

May 2023

.YONDER



Manfred Abraham

Co-CEO

Fashion lover, hotel connoisseur, Labrador owner and totally gym obsessed. If not in London, most likely down south reconnecting with nature.

Manfred co-leads Yonder and is responsible for the development of our offer and ensuring we deliver only the highest quality solutions to our clients. Manfred founded BrandCap after heading up consulting at Interbrand in London and occupying senior strategy roles at Wolff Olins. He is dedicated to business improvement and supporting people in their professional growth.

Deeply experienced in business and brand strategy development across most sectors, Manfred's particular interest lies in hospitality, luxury, retail and professional services. His clients include Rosewood Hotels and Resorts, Radisson Hotel Group, Stella McCartney, KPMG, Hays, Fruit of the Loom to name a few.



WHO WE ARE

**insight + strategy
+ imagination**

.YONDER

OUR PURPOSE

At Yonder, our purpose is in our name. We exist to help our clients go further with focus.

Yonder is about possibility and looking ahead to the future. It's about truly open-minded and expansive thinking.

Our role is to help our clients explore and uncover opportunities even greater than they have previously imagined.

This means we help you explore the true potential in your ideas and set the right direction for your future success.

Yonder is where the combination of evidence and imagination can take you.

WHAT WE DO

Customer-driven business success

The most successful and enduring businesses are those that connect deeply with their customers, understanding changing habits and behaviours in order to continuously evolve and drive the change needed to stay ahead and make a lasting difference.

Yonder brings the combination of the analytical and the imaginative to every challenge – enabling clients to think more expansively about the future, define the right opportunities to pursue and create the actions that deliver meaningful impact.

You can't predict the future but you can imagine it.

.YONDER

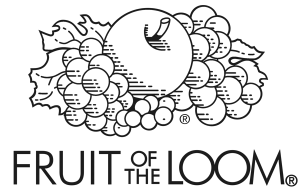
A wide and deep experience in fashion

RALPH LAUREN

STELLA McCARTNEY

NET-A-PORTER

FF FARFETCH



M&S

Lane Crawford

VANITY FAIR

REISS

ual: london college
of fashion

ASOS

R
RUSSELL
ATHLETIC

SPALDING

adidas

.YONDER



**This is not a
trends
presentation**





**What should you
watch out for?**

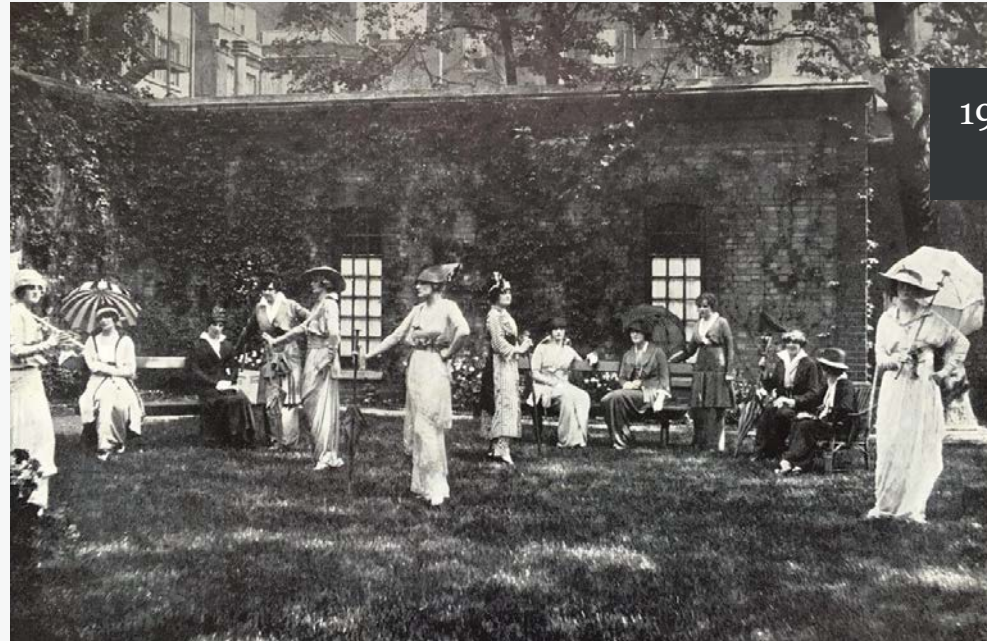
.YONDER



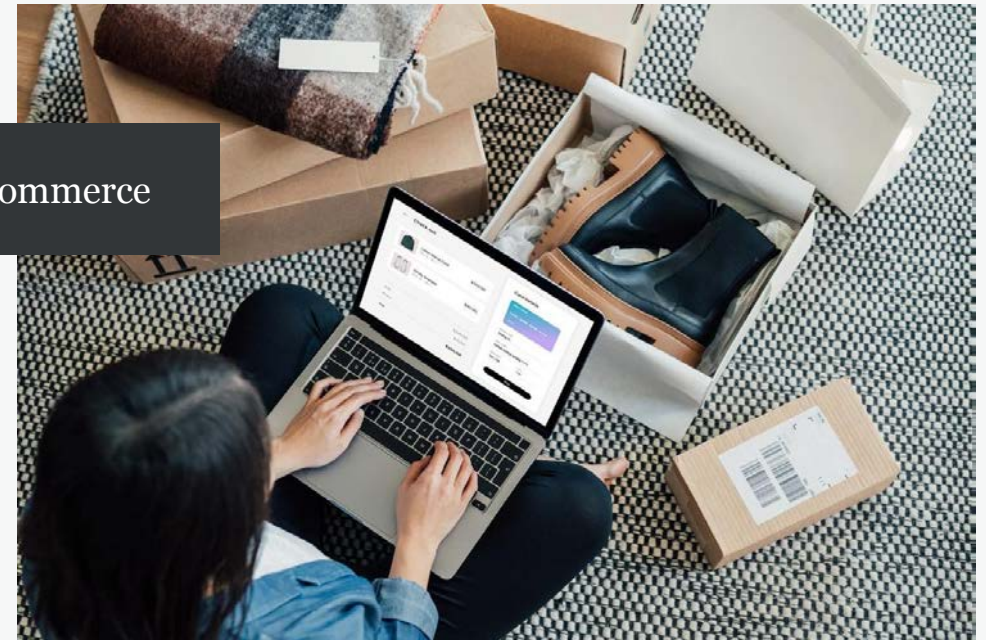
Newness

Newness

Throughout fashion history, many innovations and tools have opened up entirely new revenue models and changed the face of the industry.

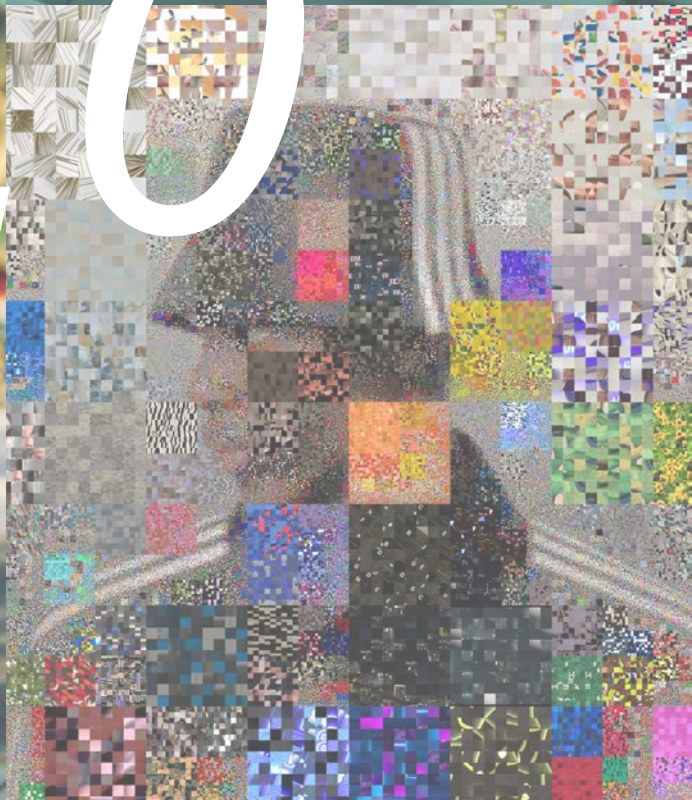
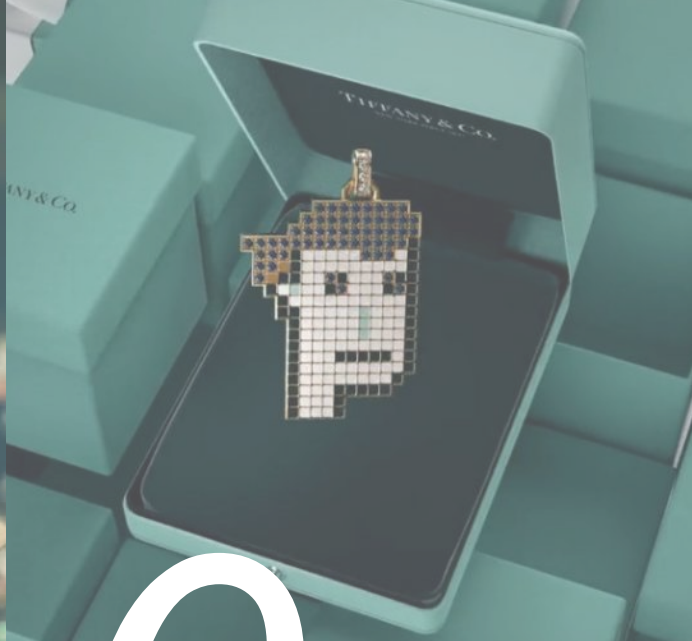


1901, Lady Duff Gordon's
'Mannequin Parade'

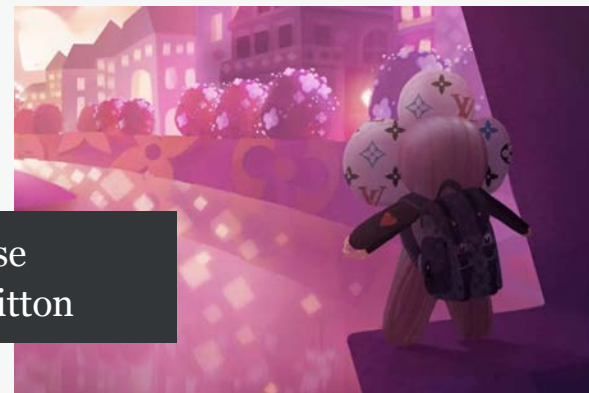
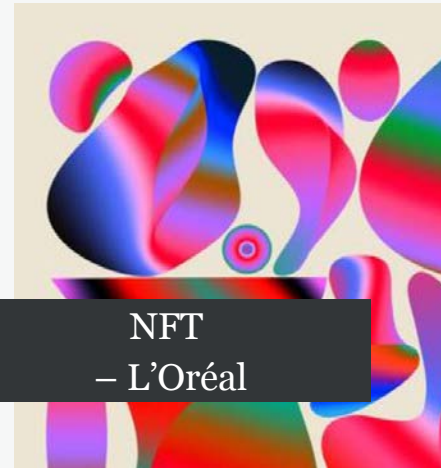
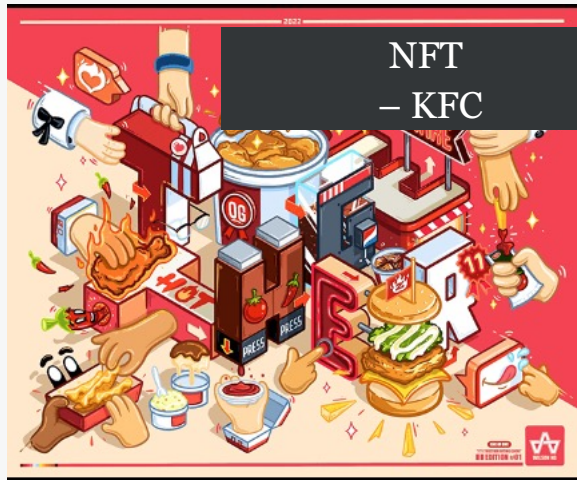


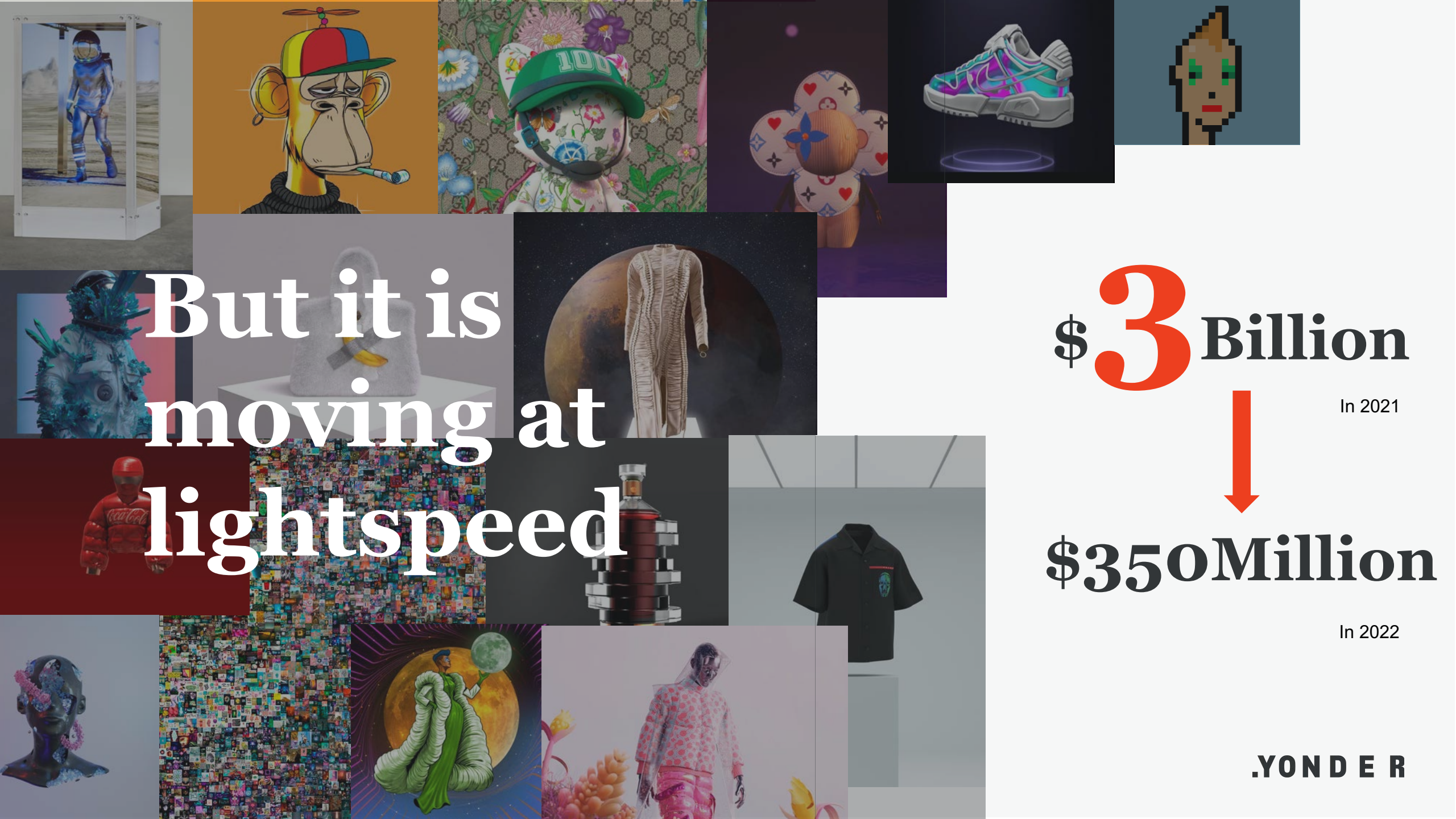
2000s, E-commerce

WEB 3.0



Brands from all industries are trying to make their mark in this space.





But it is
moving at
lightspeed

\$ **3** Billion

In 2021



\$ **350** Million

In 2022

.YONDER



A virtual fashion show stage with a large blue and purple character in the foreground and a cityscape background.

Metaverse Fashion Week



A virtual fashion show stage with multiple screens displaying a character and a central circular platform.

108,000
attendees

In 2022



26,000
attendees

In 2023

.YONDER

Understand what drives your customers in their fashion purchasing decisions

Factors influencing US luxury shoppers' luxury purchases



Vogue Business, 2022



Hermès Himalayan
crocodile Birkin

VS



MetaBirkin NFT

FORTNITE

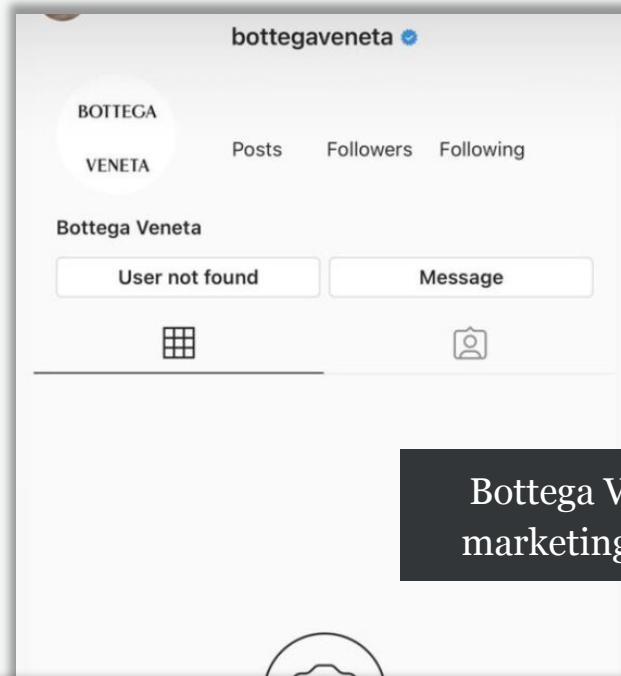
The Metaverse could have
great potential

... in a few years



Take example from Web 2.0

WHY was it successful?

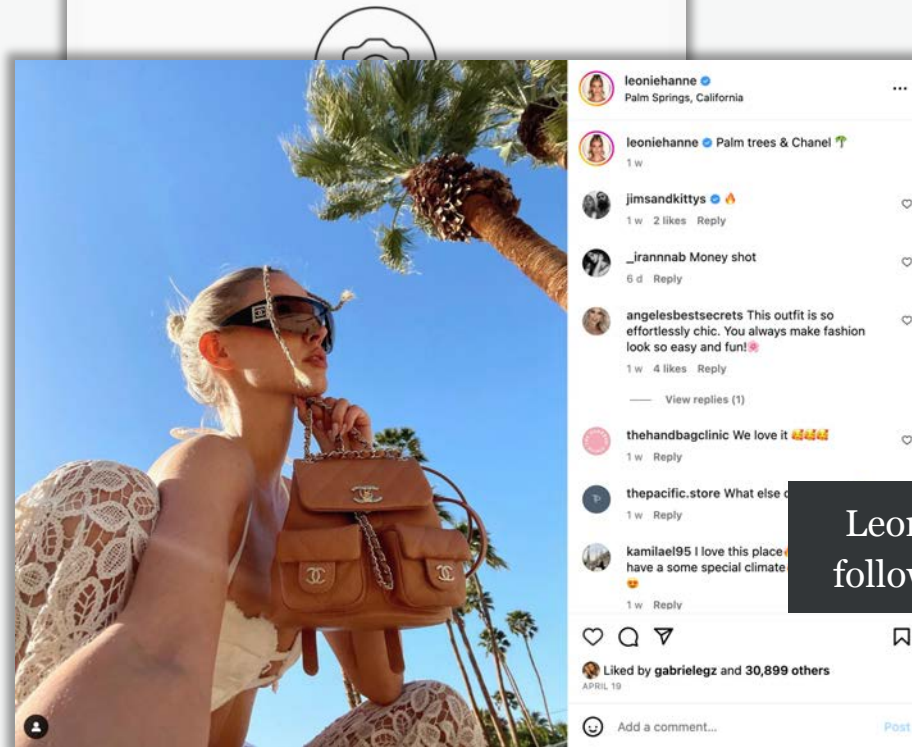


Bottega Veneta – no marketing marketing

Instant purchase through Instagram



Leonie Hanne – 4.5m followers on Instagram



**You need to
understand
where the value
is coming from.**

*WHY and HOW
Web 3.0 can be a
successful tool*

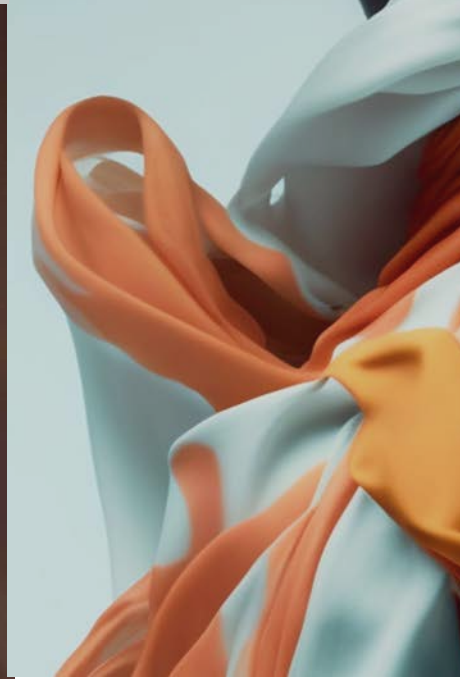
The secondhand market is
expected to double by 2027
and reach

\$350 Billion

Thredup annual report, 2023



The utility of
Generative AI
is evident.



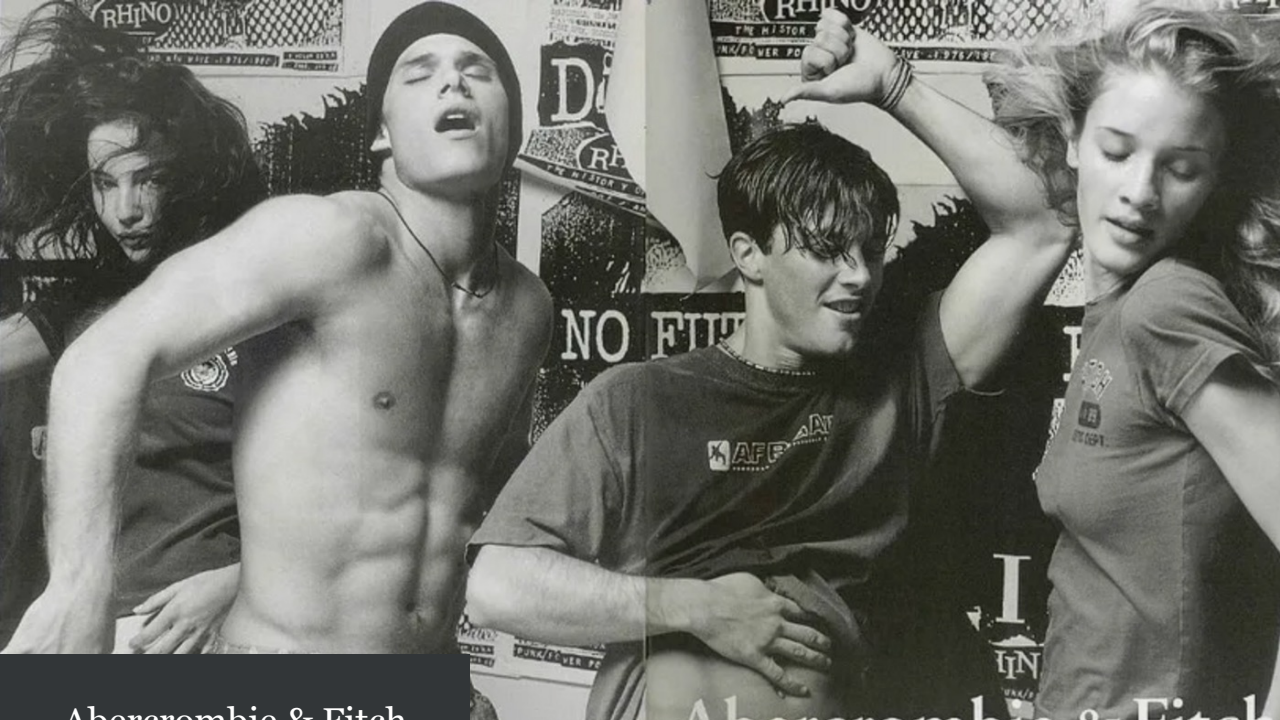
If everyone shows
the same newness,
is it still **new**?



**Bigger changes
in customer
behaviours you
should be aware of.**



Exclusivity?



Abercrombie & Fitch



Michael Kors







Expectations are evolving

... as well as,
geographical and
political changes.

China has been the target for luxury fashion for years.

60%

Of total spending growth on personal luxury goods by 2030 is likely to be driven by Chinese nationals

Morgan Stanley, 2023

25%

of the global luxury market will be from China

PwC, 2023



But South Korea
shows great potential.



\$325

Per capita, on luxury goods.

Morgan Stanley, 2023

\$16.8

Billion

Luxury goods market in 2022

Morgan Stanley, 2023



And the Middle East is not far behind

– Saudi Arabia

15%

increase in luxury spending in the Middle East in 2023

Morgan Stanley, 2023

\$89 Billion


Is the expected fashion market size the Middle East will reach.

Euromonitor International, 2023

\$15.8 Billion

Is the expected luxury market size in Saudi Arabia by 2028.

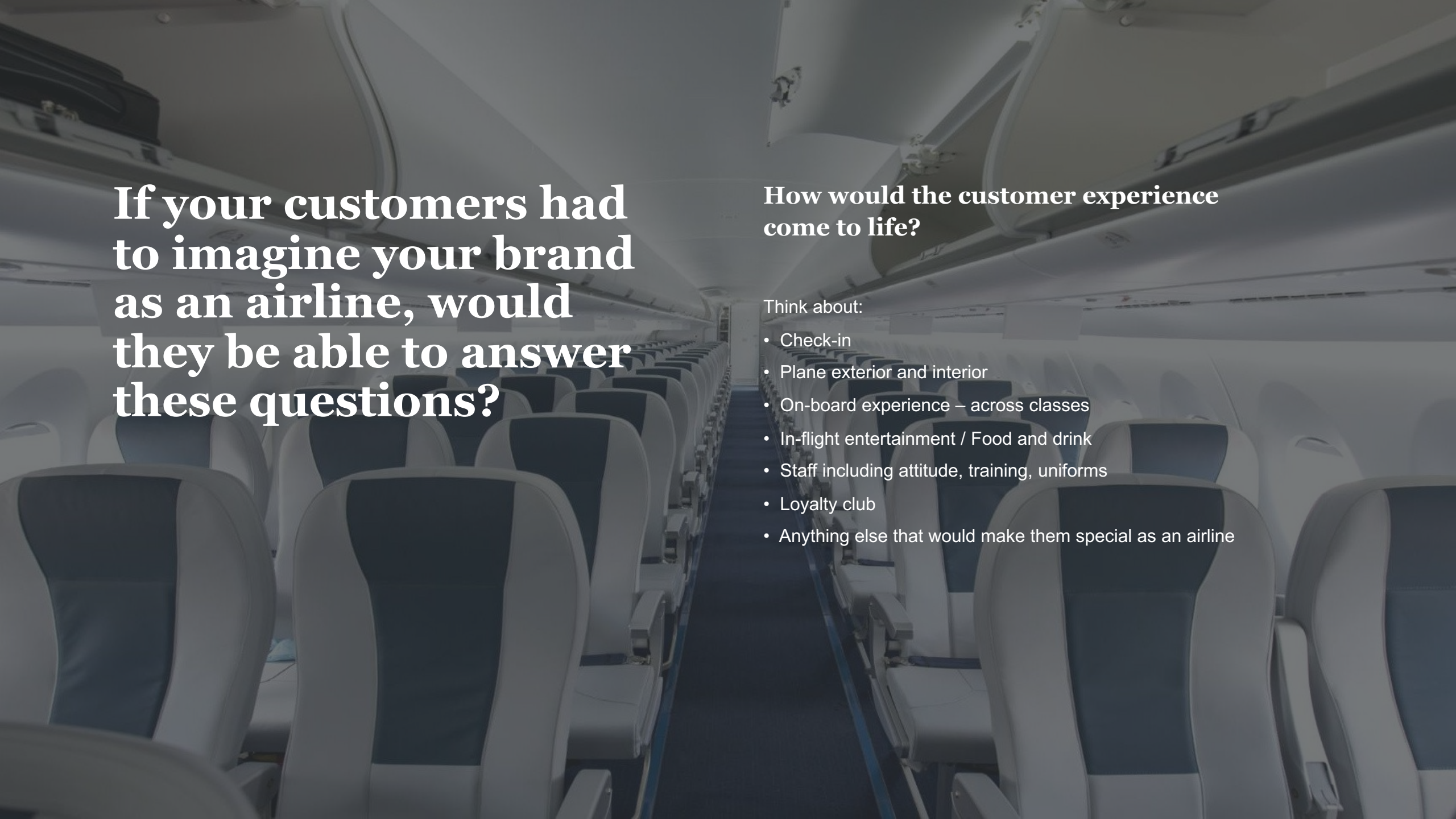
IMARC, 2023



Why does your customer have an affinity with your brand?



The Fundamental



If your customers had to imagine your brand as an airline, would they be able to answer these questions?

How would the customer experience come to life?

Think about:

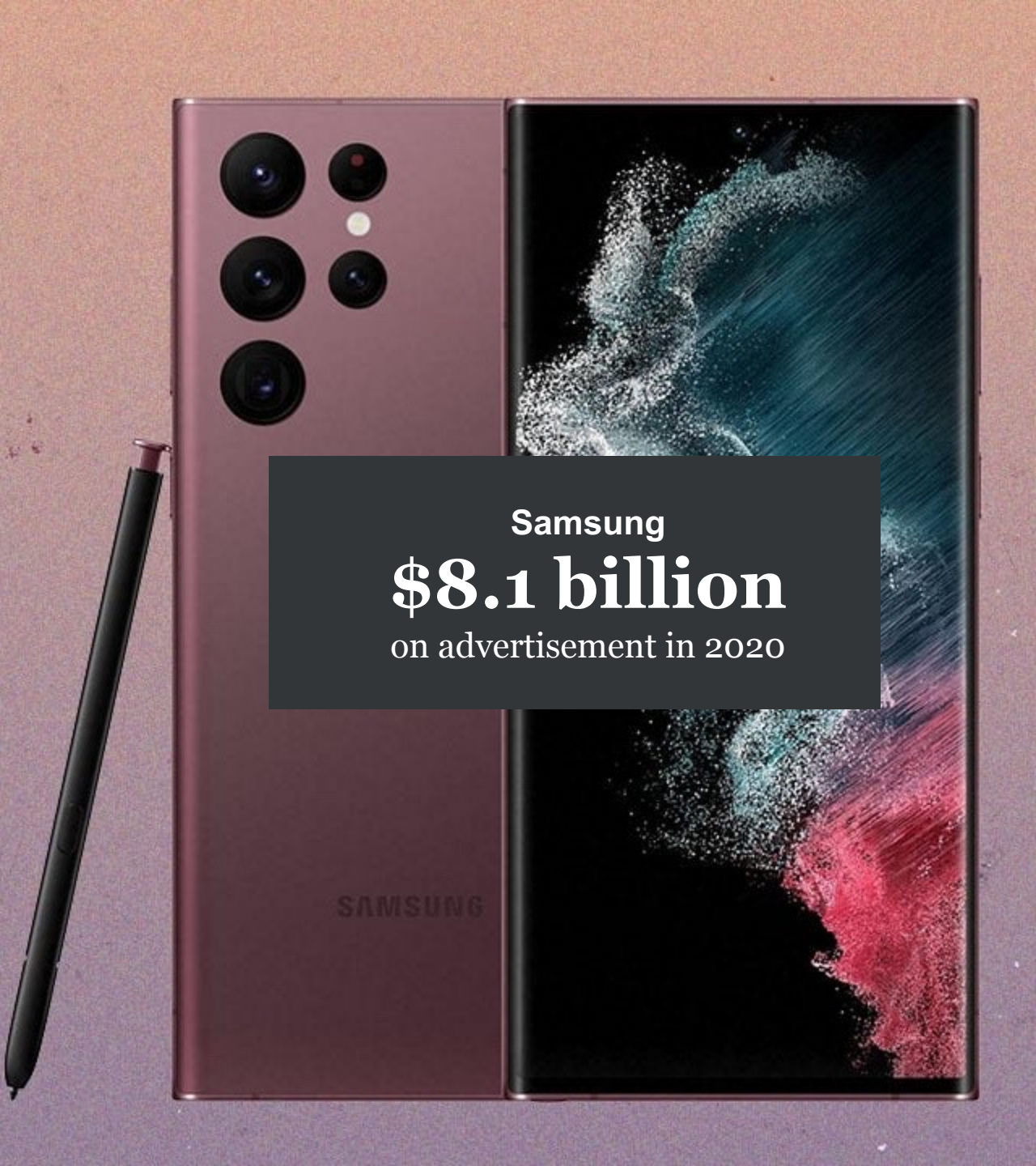
- Check-in
- Plane exterior and interior
- On-board experience – across classes
- In-flight entertainment / Food and drink
- Staff including attitude, training, uniforms
- Loyalty club
- Anything else that would make them special as an airline



**Who spends more
on marketing?**



Apple
\$2.1 billion
on advertisement in 2020



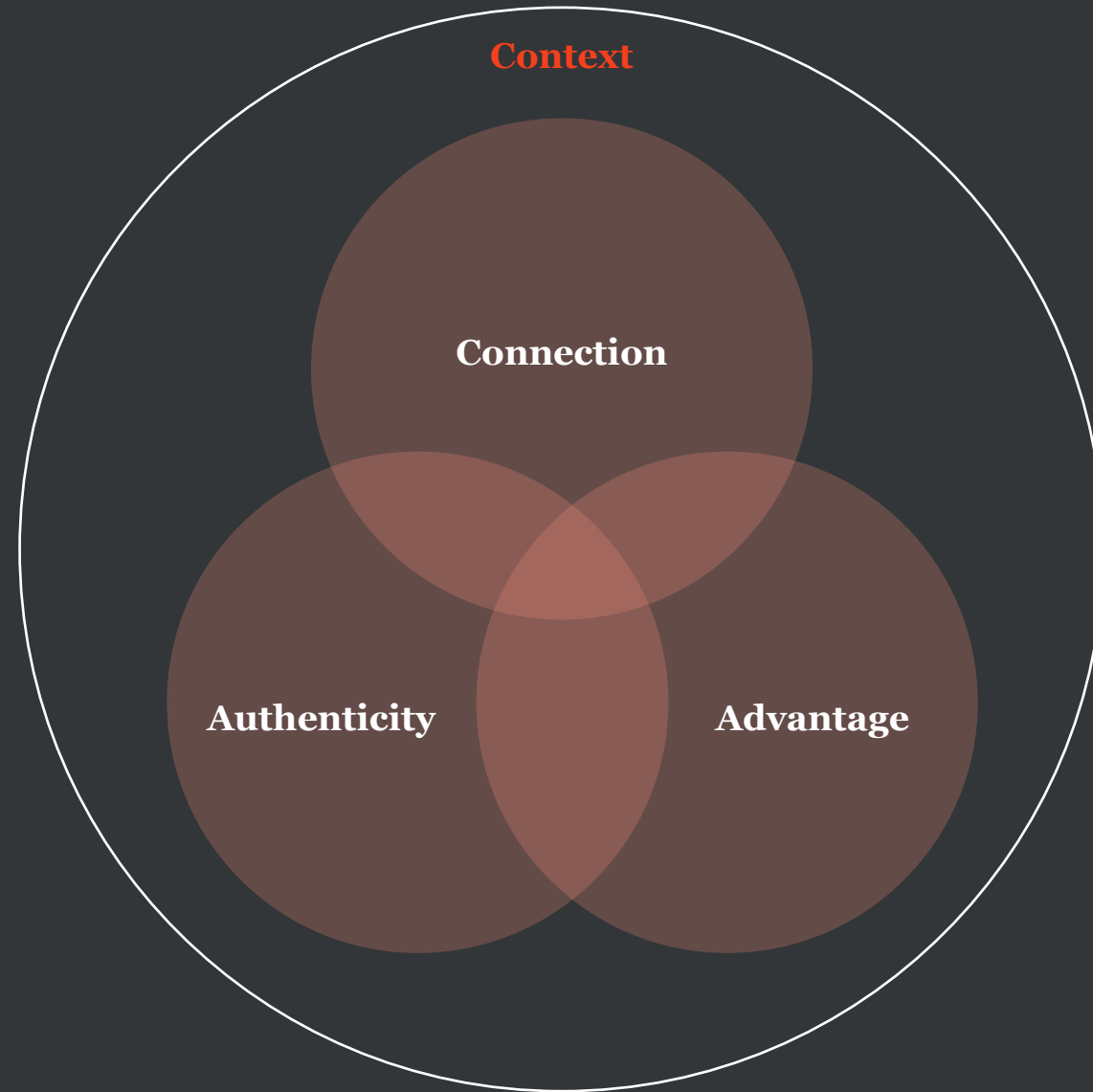
Samsung
\$8.1 billion
on advertisement in 2020

How do you
create **desire**
beyond logic?

Brand

.YONDER

Opportunity Model



Newness is
important, but
keep your brand
at the **heart** of it

Thank you

Northburgh House
10 Northburgh Street
London EC1V 0AT

+44 (0)20 7253 9900
hello@yonderconsulting.com
www.yonderconsulting.com

.YONDER