

NEW YORK, US

THE ROW

BRAND ANALYSIS
& STRATEGIC MARKETING:
DEVELOPING FIGURINES

JIALING WENG

Mainly Divided Into Ready-To-Wear & Handbags
& Footwear & Fragrances & Accessories.

Start 2006



TABLE OF CONTENTS

	ABOUT THIS BOOK	1
THE ROW BRAND ANALYSIS	CREATIVE DIRECTOR BRAND CONCEPT TARGET CONSUMERS BRAND POSITIONING	2 - 3
	BRAND MILESTONES (2006–2024) HOT PRODUCT	4 - 5
	THE ROW RUNWAY ANALYSIS	6 - 8
	COMPETITIVE BRAND ANALYSIS	9 - 13
	DISTRIBUTION STRATEGY	14 - 15
	PROMOTION	16
THE ROW STRATEGIC MARKETING	SOCIAL MEDIA	17
	SWOT ANALYSIS	18 - 19
	THE ROW FAMILY BRIEF INTRODUCTION	20
	MARKET ANALYSIS & BRAND OPPORTUNITY	21 - 24
	PRODUCT LINE DEVELOPMENT	25 - 28
	MARKETING PLAN	29
PROJECT REFLECTION	30 - 31	
	BIBLIOGRAPHY	/

ABOUT THIS BOOK

From quiet luxury to figurine development

This book examines The Row through brand analysis and strategic marketing, focusing on how understated luxury can be transformed into a new form of brand extension. It comprehensively depicts the visual and commercial language of the brand, covering brand positioning, retail strategies, fashion show analysis, promotional activities, and market research.

Based on this study, the project proposes the concept of "The Row Family", a character-based concept developed for the Asian market. Through tactility, story-telling, and the use of exquisite materials, the project explores how The Row can enhance emotional connection and cultural relevance while maintaining its understated and distinctive brand identity.



CREATIVE DIRECTOR

Mary-Kate Olsen

The company is operated by Ashley Olsen as CEO and Mary-Kate Olsen as Creative Director. They were one of the leading American child stars during the late 1990s, appearing in many televised children's series and films. Both have always had a love for fashion and styling. (Lee, 2021) "When they were in school, they normally bought many clothes each week and tried all these outfits. Later, they dropped out of college because they could not handle all the public exposure. Since they were growing up under the spotlight, they eventually made their way to the fashion industry. Their style has matured to a more subtle aesthetic, minimalism and a refined approach to fashion.

"It's about a certain confidence and sophistication, but a simplicity as well," says Olsen, who co-founded her line with Ashley in 2006, five years after they launched THE ROW. "We didn't take this for The Row until we had the perfect T-shirt." Whether hitting the streets or walking recent red carpets, the sisters often opt for black tone, as seen in The Row's 2019 Met Gala choice. (Munzenrieder, 2019) When they choose other colours, they usually pick neutrals like camel, gray, navy and white. They develop clothes that are defined by how they fit and feel, not by way of an exterior brand label. All garments maintain both comfort and sophistication while avoiding the need for big and obvious logos. Their style is simple but flawless.



BRAND CONCEPT

The Row is a luxury design brand for women established in 2006 by celebrity child star twins Mary-Kate and Ashley Olsen. The brand represents minimalism, focusing on unisex, casual and easy-to-wear design. Though elements of menswear pop up occasionally in its collections, it is more about the lighter, softer side of womenswear. The Row's aesthetic has been described as "nonchalantly awake," with loose and unrestrictive silhouettes that subtly outline the dual nature of women, balancing between "self-assuredness and sensitivity. This is the exquisite but relaxed look that most of us want to achieve. (Lin, 2023)



BRAND POSITIONING

The Row is a luxury fashion brand that focuses on low-key elegance. Established 2006 by the Olsen twins, The Row has been devoted to producing high quality and versatile pieces. The Row fuses classic and modern designs to urge every woman show her very best. The brand offers a wide variety of women's apparel and men's clothing, as well as accessories characterized by muted colors and immaculate tailoring. With luxurious materials that include cashmere, silk and lambskin, The Row designs essentials that are minimal yet elegant. The brand's target audience are those with strong fashion education and its prices range from €210 to €16,670, sold through online or offline.

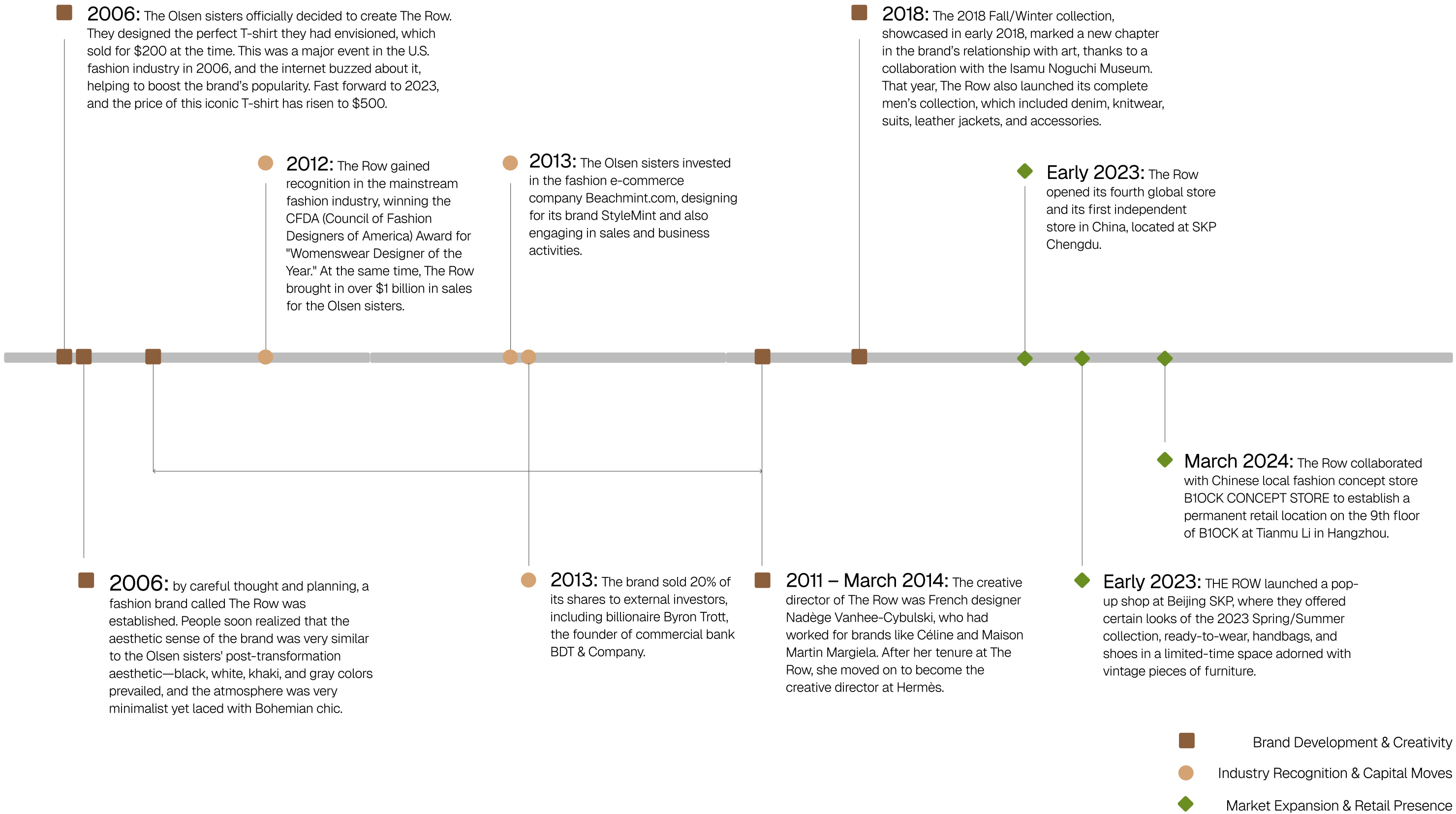


TARGET CONSUMERS

The middle-to-high net-worth demographic is the target market, which consists of mainly professionals. These are fashionable consumers who possess certain economic foundations, they pursue quality and design, have a unique personal consciousness and an independent way of life, while usually favoring simple yet exquisite iconic fashion.



BRAND MILESTONES (2006–2024)



HOT PRODUCT



Half Moon Leather Shoulder Bag

Elsa Hosk is the former Victoria's Secret Angel and Swedish fashion model. She has often carried this bag in her personal style posts. Whether that is for daily travel, casual dates, or bringing the kids out, this bag is the highlight in any outfit.



N/S Park Tote

Rosie Huntington-Whiteley, Zoë Kravitz and other celebrities have been seen wearing Park Tote, which sparks massive buzz and transforms it into the most wanted thing by fashion bloggers and customers.



Sofia Handbag

The Sofia Handbag is targeted at modern elites and cosmopolitan women with delicate taste. The medium-to-mini size makes it ideal for everyday use, featuring a well-structured interior to accommodate daily necessities without looking bulky. Considering the composite aspect of the commuter bag and the style of the fashion handbag, it equally satisfies the requirements of different occasions. Celebrities such as Kendall Jenner, Rosie Huntington-Whiteley, and Elle Fanning have all been seen carrying the Sofia Handbag.



Margaux Handbag

Margaux offers products delivering both aesthetics and functionality. Its styles highlight practicality with an appealing appearance, which closes the accessibility gap between luxury handbags and daily-use handbags. Margaux has obtained a considerable consumer base due to its affordable prices with no compromise on the quality compared to luxury items. Furthermore, its popularity among fashion freaks and celebrities who often praise and display Margaux handbags on social media helps enhance publicity. Most consumers appreciated the brand regarding its material, style, and worth-for-money after purchase, strengthening its positive word-of-mouth publicity and creating a growing social media presence.



Terrasse Bag

Celebrities like Kendall Jenner have styled the Terrasse handbag with their chic and minimalist outfits, expressing The Row's signature eternal elegance.

The Row maintains a minimalist aesthetic spirit by avoiding unnecessary embellishments and expressing the essence through simple and smooth lines focusing on an everlasting classic style. Famous for its premium materials, flawless craftsmanship, timelessness, and luxurious tactile feel, the brand's clothing is considered elegant and understated. Crafted to be functional, these minimal pieces are simplicity defined, smooth through touch and highly adaptable to style. They perfectly align with the "Quiet Luxury," serving the taste of the elite who appreciate substance over show-off.

This modest but high-quality strategy has transformed these bags into status symbols, avoiding flashy consumption. Therefore, celebrities and influencers adopted these models by leveraging their public image and taste, which are often perceived as aspirational or authoritative. Their support affects public awareness where celebrity-branded items usually conform to common aesthetics or set new ones such as minimalism, vintage style, or street style. Through their personal outfit and social media exposure, celebrities diffuse aesthetic concepts that make other styles more accessible and easier to replicate. Such trend usually results in aesthetic idolization where the consumers idolize celebrities' appearance and lifestyle and aspire to replicate them by buying related products.

Further, the halo effect provided by celebrity endorsements allows companies to be different from the herd in the marketplace and gain quick popularity. Partnering with celebrities is nothing but an endorsement of the firm that enhances its credibility. Followers, motivated by their admiration and loyalty to their idols, will be more likely to purchase items endorsed or consumed by them and thereby enhance sales and popularity visibility.

THE ROW WOMEN'S WINTER 2025

I. Overview

This season's collection showcases a silent power: the brand takes minimalist tailoring and high-quality fabrics as its main themes, creating an atmosphere of "quiet luxury". The overall impression is steady but not dull. You can see the delicate proportions and structures among the coat, sweater and trousers, exuding a sense of composure and elegance everywhere. This collection not only continues the brand's consistent calm attitude, but also infuses "warmth" into the 2025 winter - a style declaration that is not flamboyant yet firm.

II. Colour

The colours are consciously denoted. Deep charcoal grey, graphite black, stone colour and soft ivory white dominate the visual effect. The occasional appearance of khaki and dark brown merely adds warmth in a low voice. The entire set of designs almost rejects the traditional logic that "bright colours equal key points". Colour is no longer the leading role. These clothes do not seem to be "looks" prepared for the catwalk, but rather seem to have always existed in some extremely self-disciplined and extremely comfortable wardrobe. In other words, tones serve emotions rather than attract attention.

III. Showroom atmosphere

The atmosphere of the fashion show was like a quiet living room: there was a soft carpet underfoot and the light was gentle. The models walked slowly, as if they were already living in that dress. The entire space is free of exaggerated installations; instead, the more restrained it is, the more elegant it appears. As the report stated, "Some viewers even sat on the carpet," emphasizing intimacy and composure.

IV. Iconic items & style sense

Signature items are clear and restrained: wraparound cocoon-shaped jackets, stand-up high collars, soft-shouldered fur-style short jackets, thick cashmere close-fitting pants/leggings, and even "no shoes" looks. Many looks have the models land barefoot, wearing only thick cashmere leggings. The scene seems like the moment when a woman is just about to go out and is not yet fully armed - vulnerable yet in control of everything. This "unfinished" is transformed into a new elegant language. The layering method is equally crucial: the sleeveless knitted skirt is folded over the long-sleeved top, the pantyhose serves as a shawl, and the collar corners are raised instead of neatly folded.



THE ROW SPRING 2025 RTW

I. Overview

For the Spring 2025 runway, the Olsen Sisters departed from the formal, historical style of last season's runway collection and instead focused on loose-fitting casual wear and sophisticated sportswear. A number of classic basics were revamped.

II. Colour

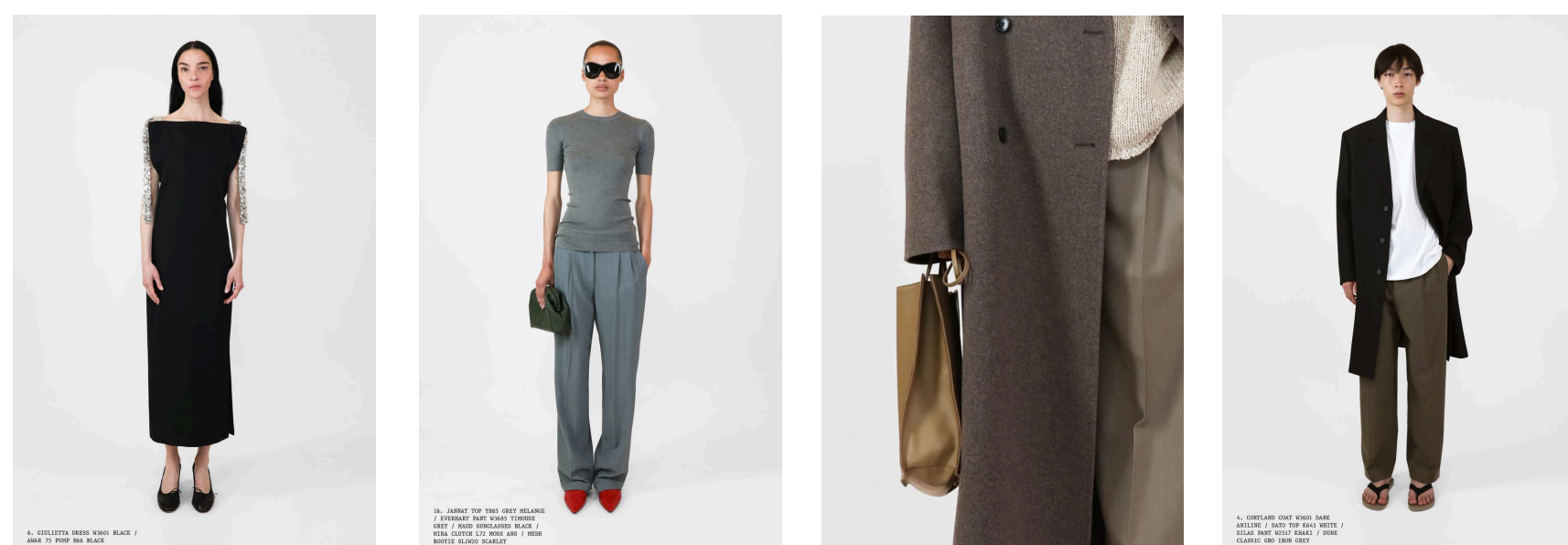
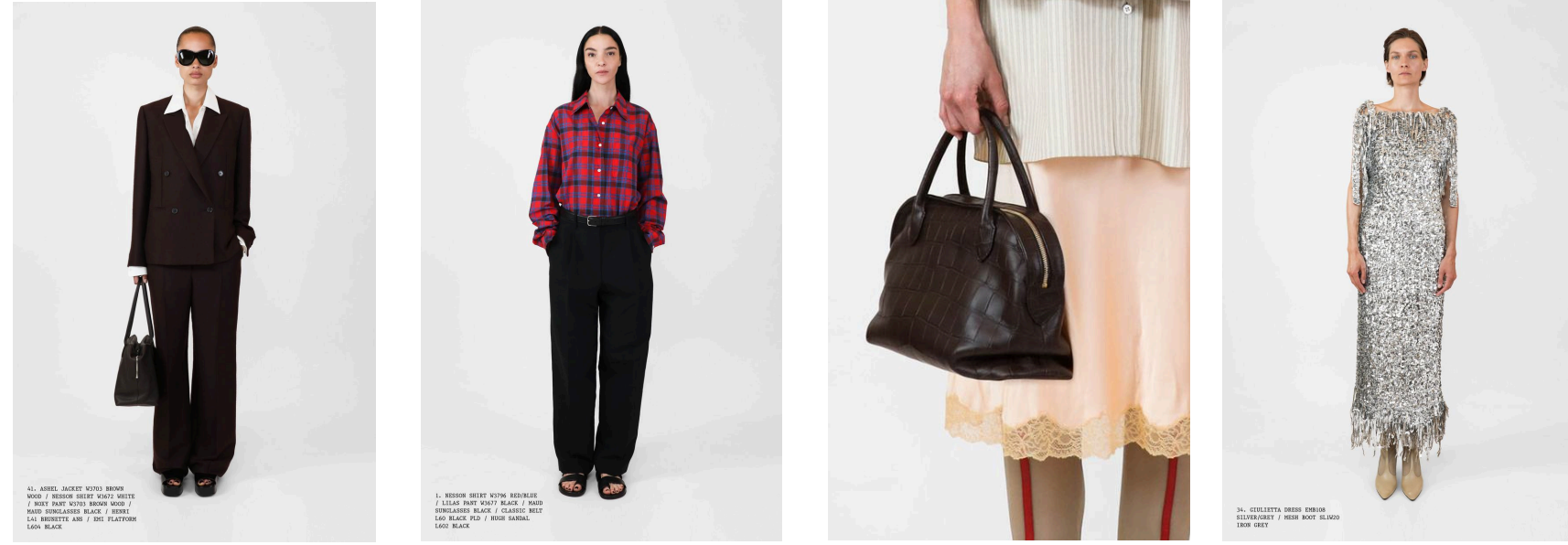
This season's collection is designed to make it easy for the wearer to wear black, white and grey, so the pieces in the show are generally in a low saturated color palette of black, white and grey and khaki, with a few splashes of red, yellowish and blue adding energy and vitality to the suits.

III. Showroom atmosphere

The runway is set up indoors, with warm wooden floors, white walls, and large French windows through which sunlight pours in, creating a comfortable space with a constant temperature for all seasons, echoing the brand's relaxed and highly accommodating apparel, the cozy environment, and the brand's advocacy of a comfortable tone.

IV. Iconic items & style sense

The collection features several different tote bags and the iconic mesh boots, casual and slouchy suits, formal flip-flops or a mix of formal and casual rustic plaid with all-black sunglasses or an exclusive knit cap, like a city dweller ready to go on vacation right after work. There are also smart and capable serious formal suits, like the elite who are leaving on a plane to go on a business trip.



THE ROW FALL 2024 RTW

I. Overview

The overall fit and style of the clothes was emphasized by the slim cut of the show. The Olsen sisters narrowed down the cut lines of this season's clothes a bit, but they are still tough, and there is no clear gender division between men's and women's clothes, the overall style of the women's clothes is very neutral, and the layering of high-necked underwear and shirts and jackets is the popular layering style of this season.

II. Colour

The overall colour palette is uniform, with black and brown used for the main colours. Some of the colours used are khaki, blue, red, gold and a little white. These colours are in line with the brand's minimalist, understated, quiet and clean approach.

III. Iconic items & style sense

This season's suits showed a sleek, feminine, equestrian and chic style. Defined silhouettes and deliberate proportions make for a cleaner, cleaner, tighter look, and we get a bright red sweater, Uxor pump ankle strap, and asymmetry evening gown. This season's bags have been downsized and made more compact.



1. KAMEL DRESS W/SHI BLACK / ETONN COATED PJS BLACK / PREDOMINANT SANGAL LIT BLACK / TRAMEL PUMP SHO BLACK



11. BAROBY DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK



15. LADONNE DRESS W/SHI GOLD / ETONN COATED PJS BLACK / PREDOMINANT SANGAL LIT BLACK



22. TONALOR JACKET W/SHI TONE / ETONN COATED PJS BLACK / JENA DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK



13. BALEY TOP TONN RED/BLACK / BALEY DRESS W/SHI BLACK / ETONN COATED PJS BLACK / JENA DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK / TRAMEL PUMP SHO BLACK



14. PLASTONOR JACKET W/SHI BLACK / BALEY DRESS W/SHI BLACK / ETONN COATED PJS BLACK / JENA DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK / TRAMEL PUMP SHO BLACK



16. BALONOR JACKET W/SHI BLACK / BALEY DRESS W/SHI BLACK / ETONN COATED PJS BLACK / JENA DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK / TRAMEL PUMP SHO BLACK



18. BALONOR JACKET W/SHI BLACK / BALEY DRESS W/SHI BLACK / ETONN COATED PJS BLACK / JENA DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK / TRAMEL PUMP SHO BLACK



17. ANGELORE DRESS W/SHI BLACK / ETONN COATED PJS BLACK / JENA DRESS W/SHI BLACK / HEBERTATA COATEDSAL LIT BLACK / TRAMEL PUMP SHO BLACK



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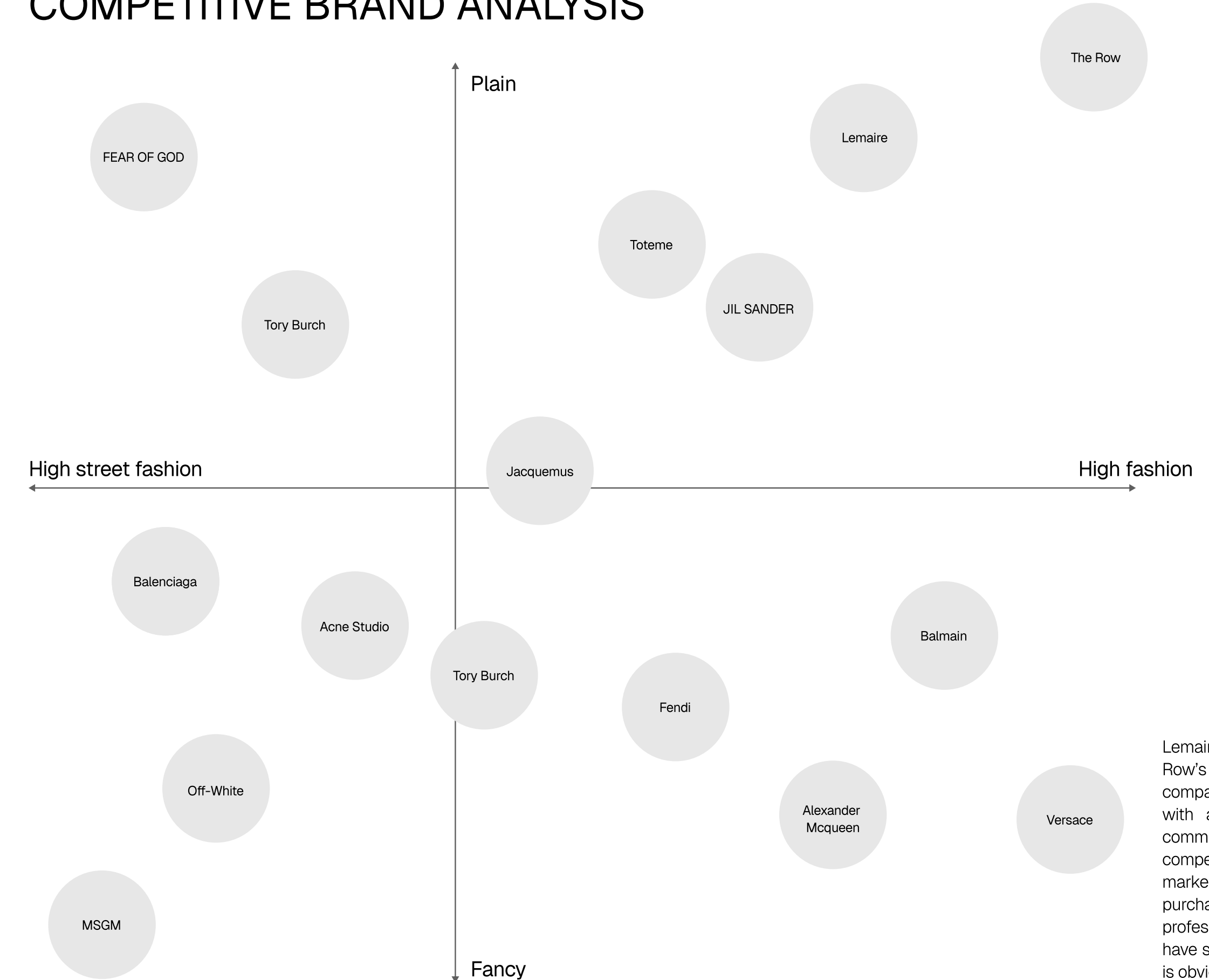


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COMPETITIVE BRAND ANALYSIS



Lemaire, Jil Sander and Toteme were selected as The Row's competitor brands after preliminary analysis and comparisons. All four brands are high-end fashion labels with a minimalist aesthetic, indicating they share a common brand image. They similarly price themselves competitively and share the same target consumer market involving high-net-worth clients with strong purchasing power, most especially those in senior professional and management roles. Since these brands have similar brand positioning, style and target markets, it is obvious that there is competition among them.

JIL SANDER

Jil Sander is a German luxury fashion brand founded in 1968 and its minimalist style is defined by a "harmony, understatement, and dynamic elegance." The brand was founded by German-born designer Heidi Marie Jiline Sander, known for being the "Queen of Minimalism" due to having studied and applied minimalism in her fashion practice. Her collection includes cuffed pants, feather-light tops and lightweight jackets, which remove all unnecessary details. Zippers and buttons are completely abandoned, giving a clean and polished outlook. Sander's style has affected many contemporary designers and is favored by urban professionals who value minimal but high-quality lifestyles with an emphasis on customized taste and style.

The brand has seen several designers come and go over the years, including Raf Simons and Rodolfo Pagliarunga. Raf Simons delivers an artistic flair to the brand, while Rodolfo Pagliarunga's design seems not popular. Jil Sander offers a line of ready to wear, as well as shoes, bags, accessories and fragrances. The brand's products sell from 120 euros to 8,000 euros.

Brand Style

Minimalism, simplicity, refinement, elegance

Target Consumer

Urban professionals aged 25-45, who pursue high-quality living and value personal style and taste

Price Range

120 euros to 8,000 euros

Product Line

Ready-to-wear, shoes, bags, accessories, and fragrances

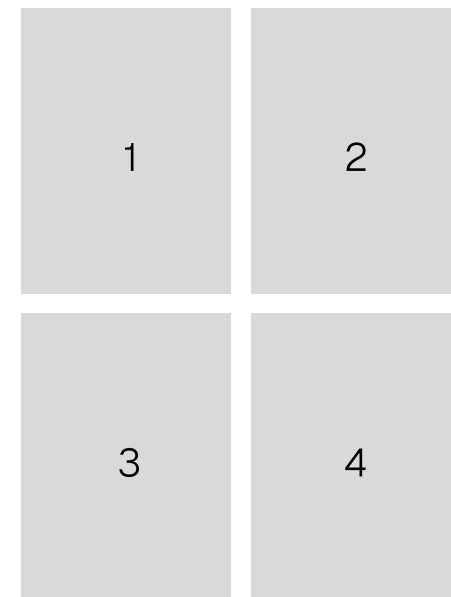


Image1 - Jil Sander - Women's and Men's Fall/Winter 2024
 Image 2 - Spring/ Summer 2025 Women's and Men's Collection
 Image 3 - Jil Sander creative director Rodolfo Pagliarunga
 Image 4 - Heidi Marie Jiline Sander

LEMAIRE

Lemaire is an upscale fashion brand created in Paris by French fashion designer Christophe Lemaire in 2006 and launched under the name Christophe Lemaire. His wife Sarah-Linh Tran joined the firm in 2010 and the brand renamed as Lemaire in 2015. Christophe Lemaire himself worked at Hermès for four years and his philosophy on fashion has been greatly impacted by this experience, which granted him an exceptional sense of luxury through silhouettes, materials and details. Everyday clothing is the brand's focus. Delicate and precise cuts and premium materials are determining characteristics. Lemaire mainly sells ready-to-wear collections, handbags, shoes, and other items. The brand's followers are those fashion-savvy people who appreciate simplicity, stress quality, pursue personal expression and lifestyle and admire brand's culture and image. Such customers tend to show refined taste through details and textures and own strong economical means.

Lemaire's prices fall within the luxury category, ranging from €135 to €3565 individually, indicating the brand's target market consists of people who possess economic power and life quality.

Brand Style

Minimalism, French Elegance

Target Consumers

Aged 25-45, valuing simplicity, quality, personal expression, and lifestyle; those who appreciate understated design and resonate with the brand's culture, using details and texture to convey deep taste, with solid economic standing.

Price Range

€135 to €3,565

Product Line

Ready-to-wear, bags, shoes, etc.

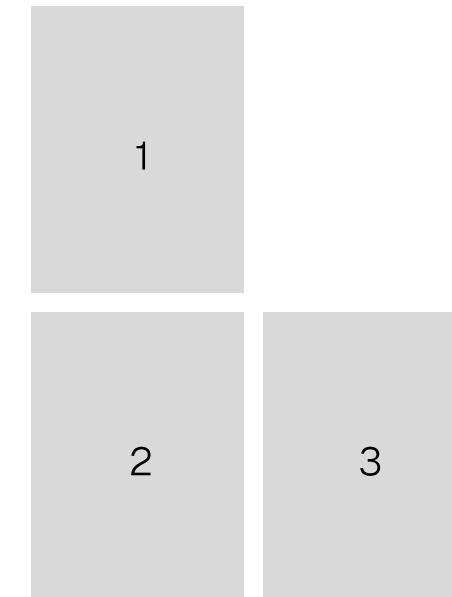


Image1 - Brand founder: Christophe Lemaire (right)
 Image 1 - Brand creative director: Sarah-Linh Tran (left)
 Image 2 - Lemaire Spring 2025 Men's Fashion Show Look 45
 Image 3 - Lemaire Spring 2025 Men's Fashion Show Look 18

TOTEME

Toteme is Stockholm-founded Swedish lifestyle brand launched by fashion blogger couple Elin Kling and Karl Lindman in 2014. Intermediaries between European minimalism and old-world American sportswear, the fashion brand is famous for its recognizable and modest designs, precisely cut asymmetric edges and tailored silhouettes that express a luxury-casual, Scandinavian take on life. The brand is devoted to create an efficient, comfortable and elegant closet to modern women who pursue minimalist chic, quality of life and identity and has quite strong purchasing power. Sustainability is an equally important aspect for the brand, which plans to produce with 100% environmental-friendly materials by the year 2030. The brand produces ready-to-wear clothing, accessories, shoes and handbags. Prices range from 140 euros to 4,500 euros.

Brand style

Scandinavian minimalism, elegance and sophistication.

Target consumers

25 to 45 years old, mainly women, the pursuit of low-key, elegant, high-quality urban high-income female

Price range

between 140 and 4,500 euros

Product line

ready-to-wear, shoes, bags, accessories, etc.

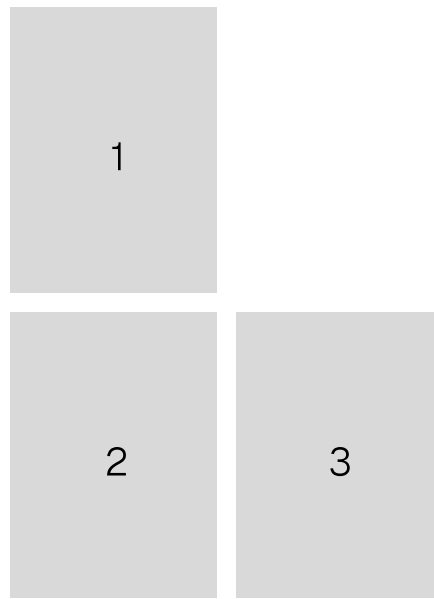



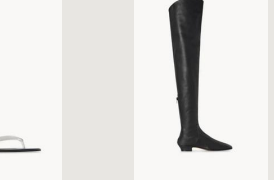
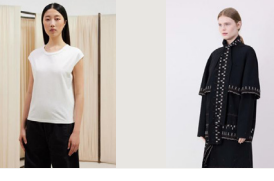
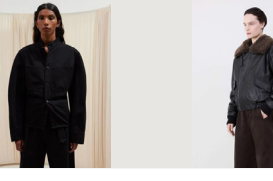
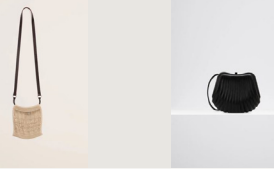











Image1 - Toteme's Elin Kling and Karl Lindman
Image 2 - Toteme Spring 2025 Ready-to-Wear Collection Look 1
Image 3 - Toteme Spring 2025 Ready-to-Wear Collection Look 27

BRAND ITEM COMPARISON

Brand item price range (unit: £)				
BRAND/ CATEGORY	TOP	JACKET	BAG	SHOES
THE ROW	 £330.00 ~ £3,930.00	 £1,810.00 ~ £8,450.00	 £980.00 ~ £16,670.00	 £630.00 ~ £4,060.00
LEMAIRE	 £630.00 ~ £4,060.00	 £395.00 ~ £2,685.00	 £105.00 ~ £3,410.00	 £380.00 ~ £1,170.00
JIL SANDER	 £130.00 ~ £2,090.00	 £940.00 ~ £7,100.00	 £660.00 ~ £3,740.00	 £530.00 ~ £3,320.00
TOTEME	 £80.00 ~ £1,300.00	 £490.00 ~ £4,110.00	 £730.00 ~ £1,740.00	 £270.00 ~ £1,410.00

DISTRIBUTION STRATEGY

Online Sales

- I. Official website
- II. Sales on some high-end e-commerce platforms (such as Net-a-Porter, Farfetch, etc.).

Online sales meet the needs of global customers, provide a convenient shopping experience, and cover the full range of the brand's products, including men's and women's clothing, accessories, footwear, and more.

Offline Sales

Some products of The Row are also sold through luxury department stores like Saks Fifth Avenue and Bergdorf Goodman. As of 2015, The Row has sold in 164 stores across 37 countries worldwide. (Iredale, 2015) Additionally, The Row has dedicated flagship stores in major global fashion cities in Europe and North America, including New York, London, Paris, and Los Angeles. In Asia, The Row also has pop-up stores and counters in Beijing, Shanghai, Shenzhen, Chengdu, and Tokyo, Japan.

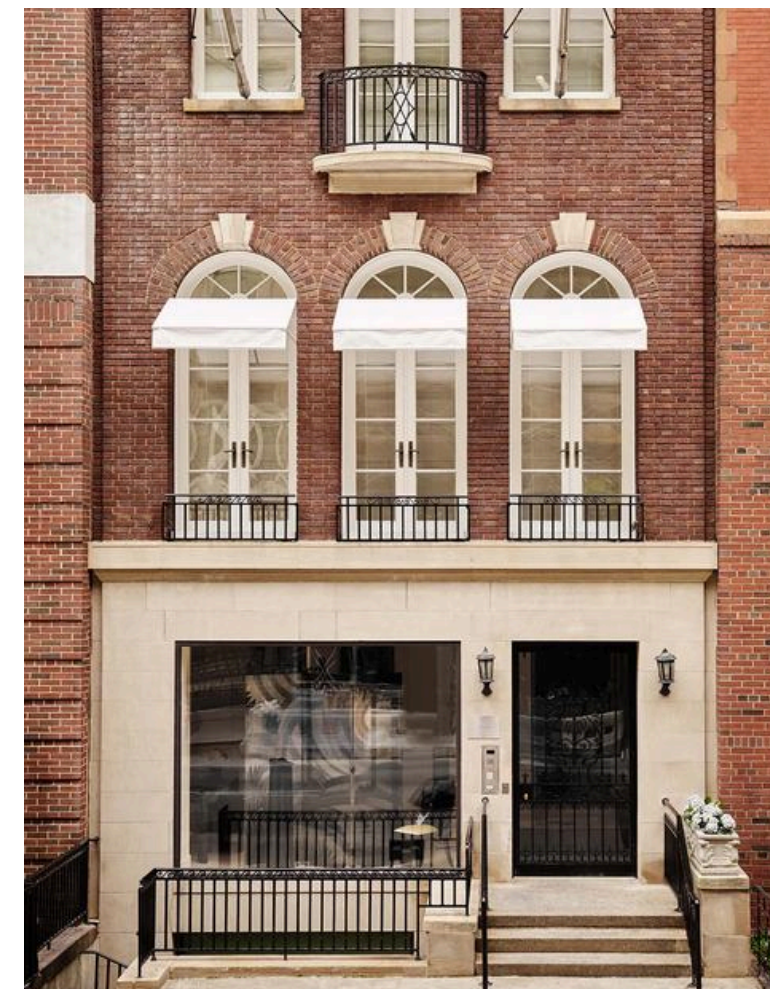
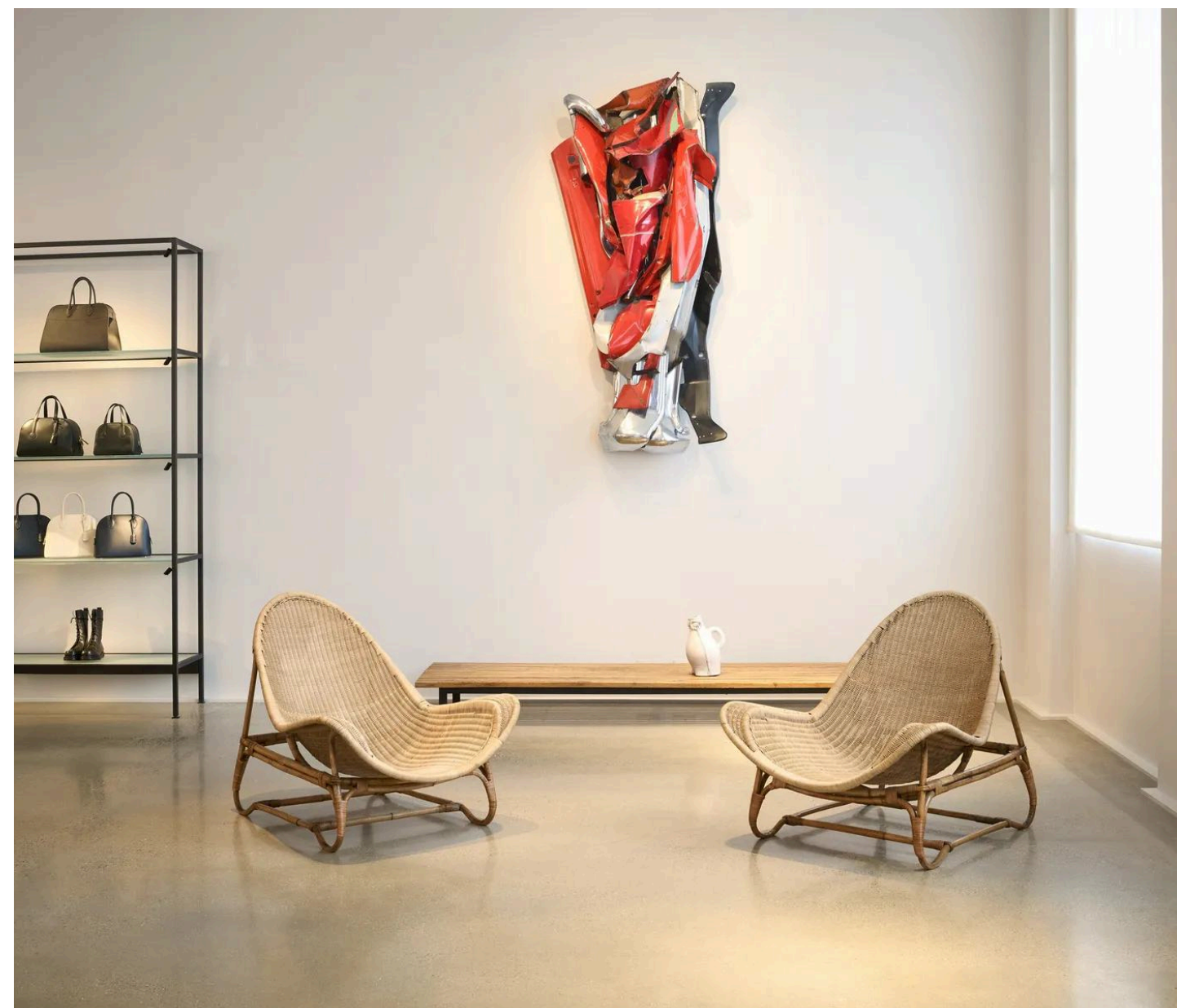
Characteristics And Style Of Offline Stores

The Row has a unique but consistent style within each boutique, and the design aesthetic is consistent with the overall brand image. Minimalism is the focal point along with the luxurious textures and the high-end custom appearance. Fashion is blended with the carefully curated interior décor and art pieces to amplify the retail experience.

The architecture and layout of the physical stores inspire the ambience of an upscale private residence. Simple palettes involving beige, gray tones, and whites are often adopted to project the sense of openness and the stream of the natural light. Store display is minimized to treat customers to the essence of quality rather than quantity, representing brand's understated luxury image. In addition to the brand clothing and accessories, consideration is put on detail by the carefully selected furniture and artworks. High-end materials involving marble, natural wood tones, and metals are the standard of the décor and furniture within the store and showcase the harmonious and upscale shopping ambience.

The store atmosphere mirrors the brand's elegant minimalistic style, and each outlet has a calm and elegant ambience with mid-century modern flourishes and tastefully selected decorations. Store architecture is usually so spacious that it provides customers with a relaxed and casual shopping experience. The absence of overcrowding and heavy decoration allows for an emphasis on the clothing itself to facilitate customer engagement.

Some retailers also provide custom-made services by which customers can select various style, colors, and fabrics based on individual requirements and reflect the brand's commitment to detail and individual taste.



In 2014

The Row opened its first offline store, located on Melrose Place in Los Angeles, USA. This was the brand's first flagship store.
New York Store - 17 East 71st Street New York, New York 10021



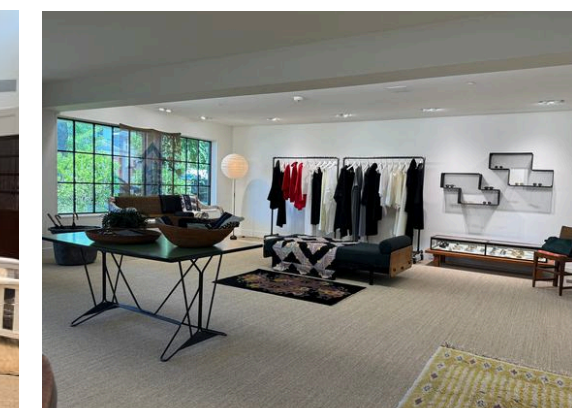
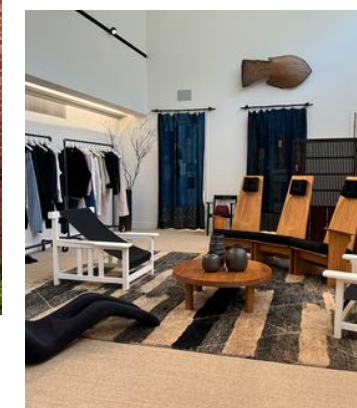
In 2019

The Row opens a store in London.
London Store - 15 Carlos Place London W1K 2EY United Kingdom



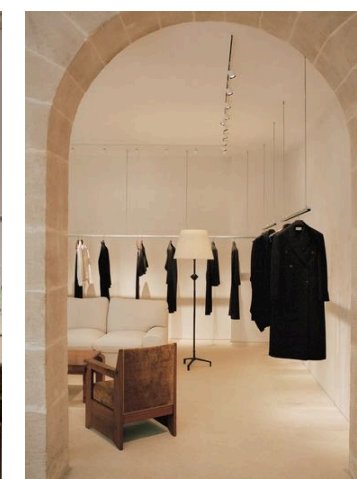
May 2014

The Row has opened another physical store located on Melrose Place in Los Angeles, USA
Los Angeles Store - 8440 Melrose Place Los Angeles, California 90069



In 2016

The Row has opened another physical store in New York.
Amagansett Local Store - 216 Main Street Amagansett, New York 11930



In 2020

The Row opens a store in Paris, France.
Paris Boutique - 1 Rue du Mont Thabor 75001 Paris

Price Differences Among Stores

The price of The Row remains similar worldwide but can differ by the power to purchase within various markets and by local tax policies. Prices within the stores in London or Paris can be somewhat more expensive compared to the U.S. market by virtue of the taxes and the rates of currency exchange, but nothing that alters the overall price strategy of The Row. The brand never wavers from the high-end luxury price positioning.

In some specific markets or cities, The Row can make slight changes to accommodate market demand, but generally speaking, the brand's price strategy mainly focuses on maintaining the high price which is a feature of luxury brands to ensure its brand image is consistent with the target consumer group's expectations.

Items Sold In Offline Stores Market Strategy

Ready-to-wear

Men's and women's collections consist of suits, coats, trousers, dresses, shirts, etc., distinguished by simplicity and elegant style with accentuated high-quality tailoring and textiles.

Accessories

Comprising luxury leather items, shoes, purses, scarves, etc., these accessories usually possess exquisite craftsmanship, which are complements to apparels for perfect outlook.

Shoes

The shoes section has stylish high heels, flats, and sneakers, aiming to combine comfort and fashion.

Coats and trench coats for men and women

Made from high-grade wool, tweed, and other premium cloths, the fashions highlight the merging of classic and modern aesthetics.

Limited or exclusive fashions

Some stores provide limited editions or special collections that are not sold anywhere.

The market strategy of The Row aims at the high-end market that is why its offline outlets are primarily located in major luxury cities and first-level shopping areas globally. Some of these cities are:

New York and Los Angeles

As the largest fashion cities within the United States, the storefronts for The Row within these cities are very high-end.

Paris, London, and Tokyo

Global fashion capitals where the brand's retail outlets here also play equally critical roles.

Chinese Market

With the continuous expansion of the market in the field of luxury products in China, it has now begun to establish outlets within the first-tier cities within the country such as Shanghai, Beijing and Chengdu. Nevertheless, its market growth is slower and steadier compared to some other luxury brands.

Brand's strategy focuses more on opening upscale stores and not on extensive distribution. Therefore, the brand did not go on extensive store openings similar to other luxury brands.

PROMOTION

Advertising & Marketing

The Row positions itself as "quiet luxury" and depends almost exclusively on word-of-mouth and not on advertising or media promotion. Its reputation is developed through rarity, quality, and craftsmanship rather than through massive advertising campaigns. Meanwhile, The Row also resists overt advertising and social media exposure and can therefore be differentiated within the competitive luxury marketplace. Its advertising initiatives promote individuality and timelessness and are delivered through managed media announcements or high-style editorials. Through this approach, The Row has developed a distinctive allure and increased its appeal to ultra-high-net-worth individuals but differentiated its luxury positioning from other overtly branded competitors.

Magazine Collaborations

The Row coordinates extensively with leading fashion magazines like Vogue, Marie Claire, and Harper's Bazaar to highlight its fundamental products, including the Margaux bag and timeless trench coats. Advertisements in magazines are mainly centered on product placements, individual style editorials, and brand narratives more than full standard advertisements. The brand are often mentioned in feature editorials, including those defining "quiet luxury" or trend stories.

Celebrity Effect

The Row uses the celebrity phenomenon to promote brand image and value to an upper-class customer base who seek quality and discreet luxury. Celebrities such as Kendall Jenner, Zoë Kravitz, and Jennifer Lawrence can be seen wearing and carrying The Row's products, which emphasizes the luxury image of the brand.

- In significant fashion events like the CFDA, Mary-Kate and Ashley Olsen themselves showcase their brand's designs, reinforcing the strong association between the brand and luxury fashion. (Scemama, 2023)
- Influencers and creators such as Neelam Ahooja share in-depth posts on social media and reveal the craftsmanship and styling capability of the brand.

Marketing Characteristics

The Row adheres to the "low exposure" strategy to market through the "if you know, you understand" philosophy. This emphasis on the timelessness and functionality of its products attracts consumers who appreciate classic styles.



《Harper's Bazaar》



《Vanity Fair Italia》



《StudyMagzine》



Hailey Bieber



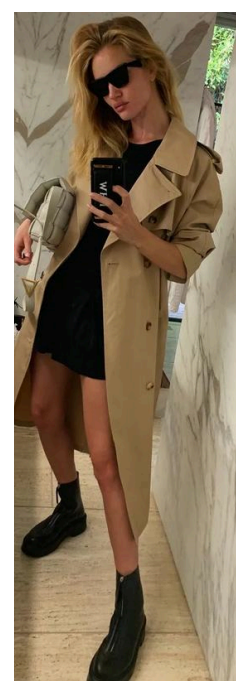
Ariana Grande



Kendall Jenner



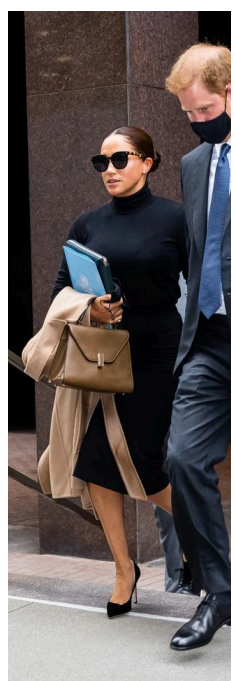
Zoë Kravitz



Rosie HW



Rosé



Meghan Markle



Kerry Washington

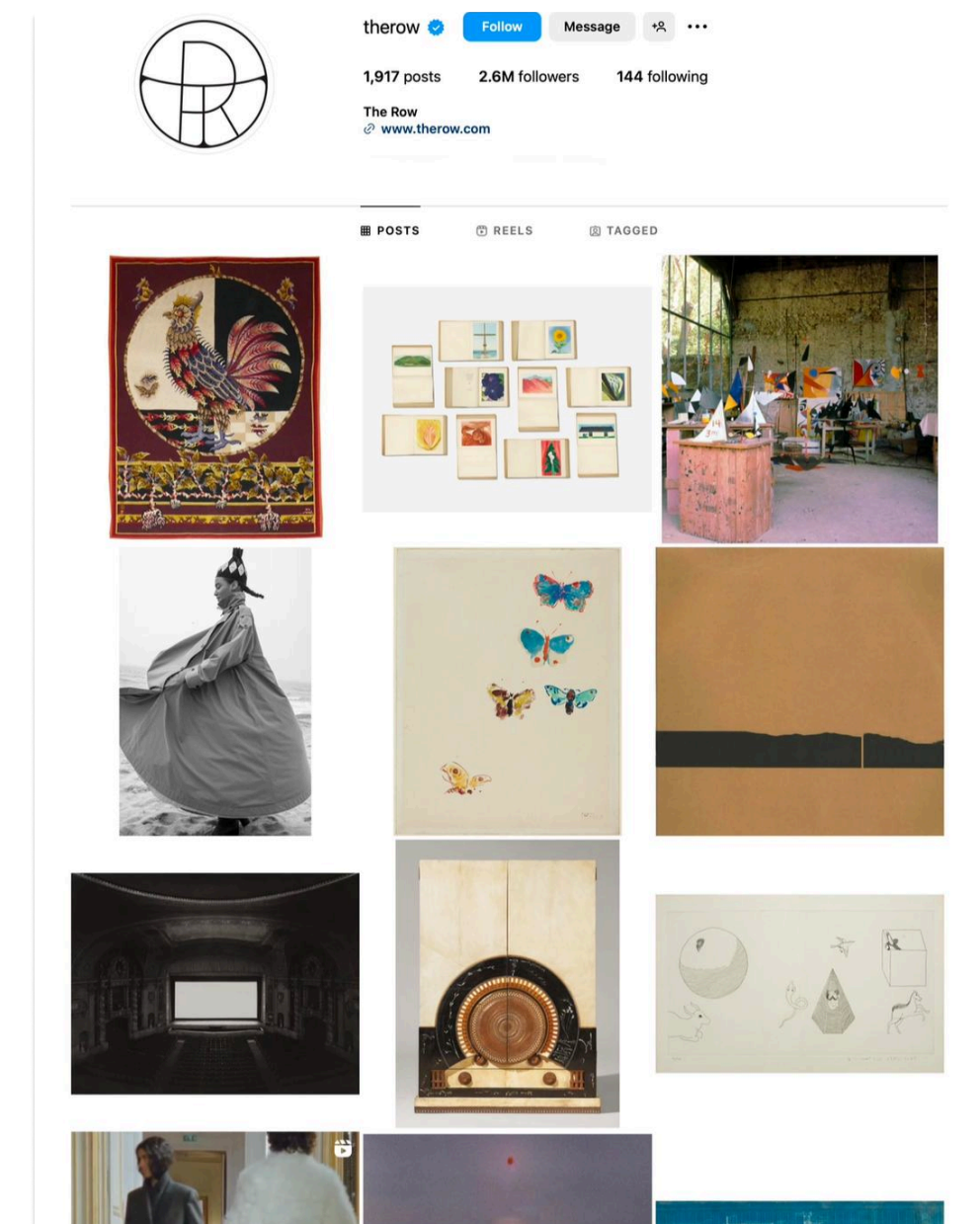
Fashion Show Strategy

During events like Paris Fashion Week, The Row implements a no-phone policy to guarantee the experience is attention-intensive and totally immersive. This is consistent with its brand image but also raised the concern regarding accessibility and exclusivity.

SOCIAL MEDIA

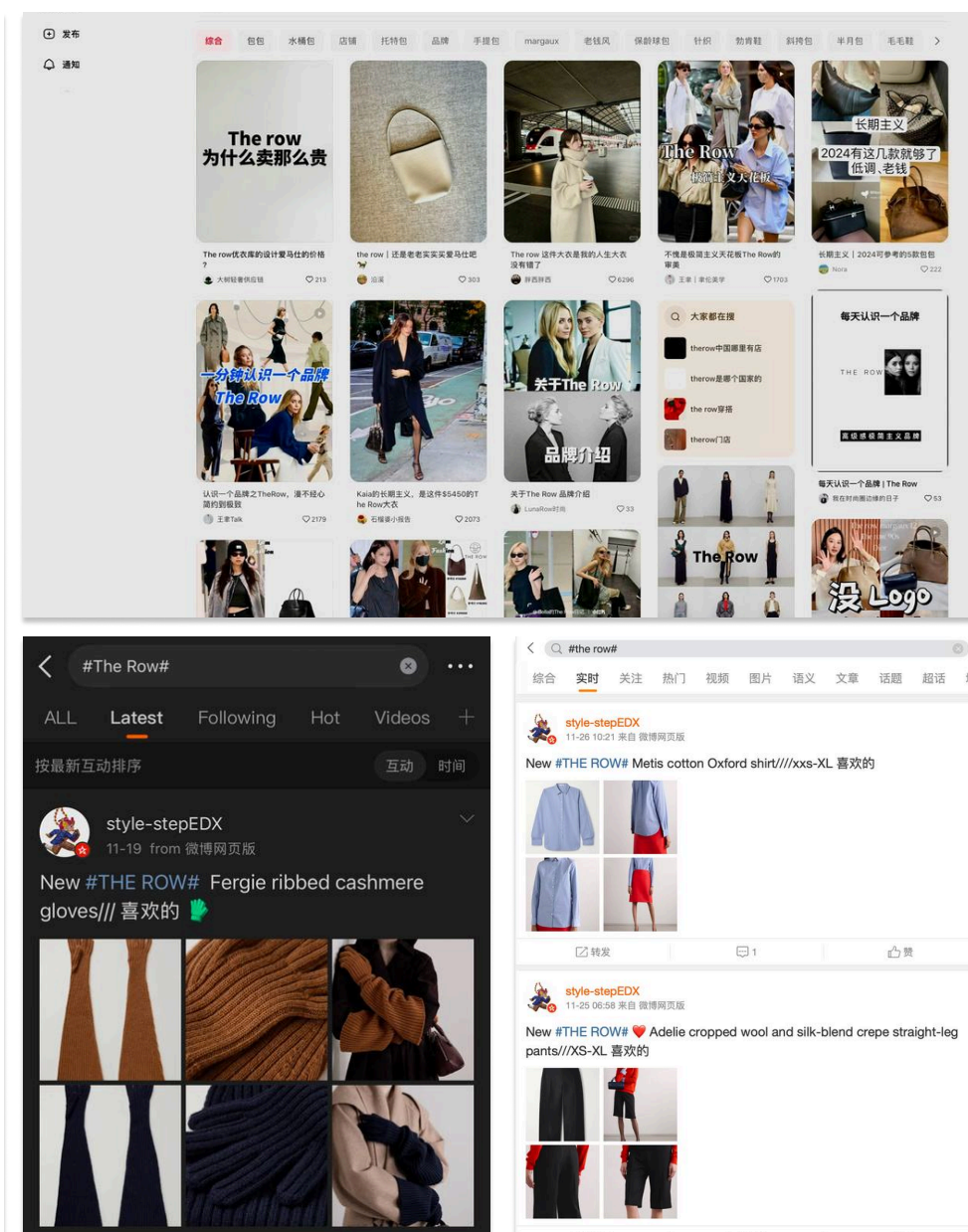
Instagram

The Row creates an understated Instagram account that simplifies its aesthetic to fine art imagery and "quiet luxury" brand essence. Posts mainly highlight the impeccable craftsmanship and classic style of its items with minimal captions or promotional content. The account has attracted many followers due to its understated appeal even if there are not many posts.



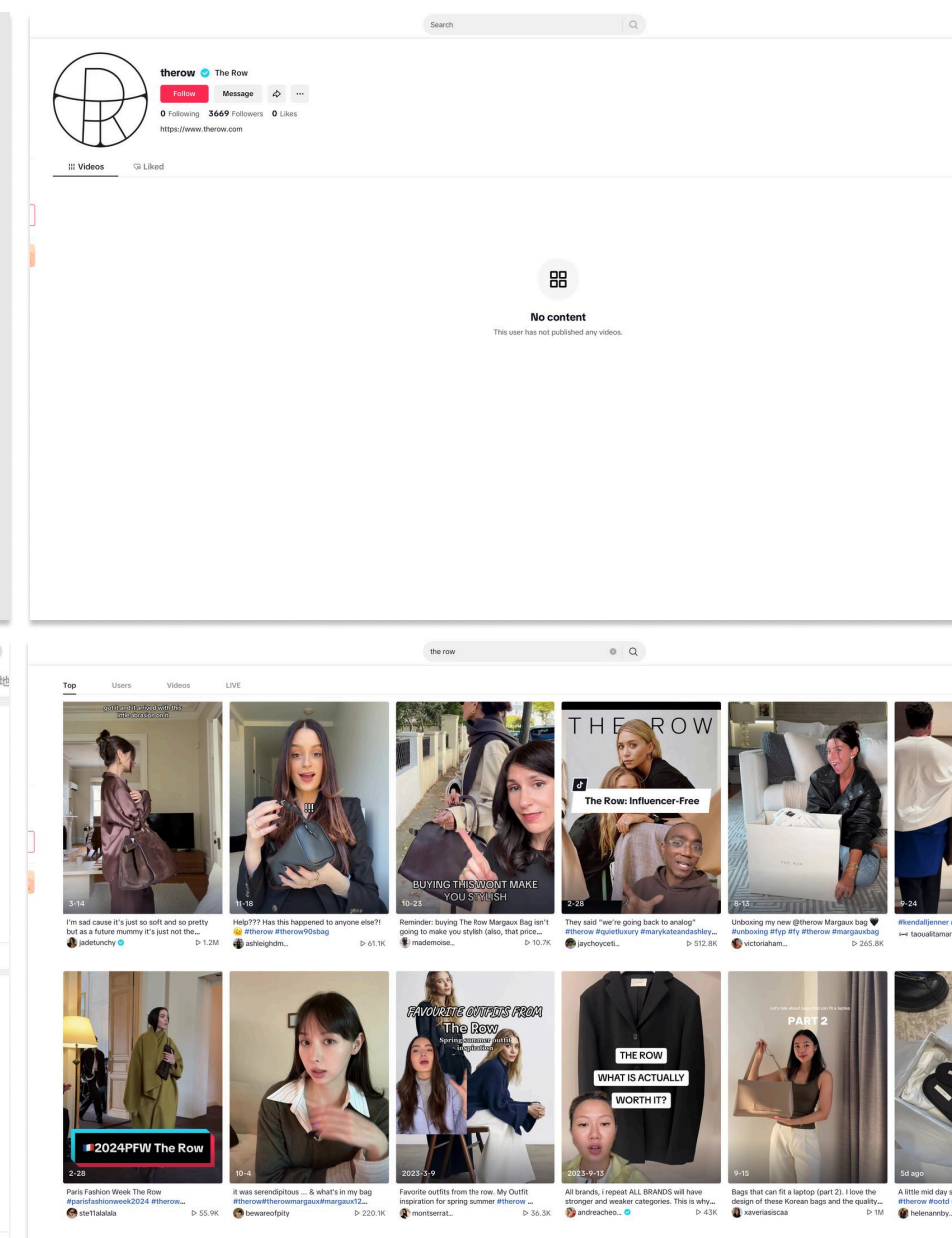
Weibo And Rednote (China)

The Row tries to target Chinese consumers on this platform, but the engagement is inconsistent. Although the hashtag #TheRow has garnered notice from fashion-world insiders, events like the no-phone ban at its Fall/Winter 2024 show haven't received as much recognition as Western ones did. It indicates challenges of integrating the brand's exclusive positioning into a social media-driven young market.



TikTok

The brand doesn't post on TikTok at all, reflecting its reluctance to partake in fast-break trend-driven platforms and thus sustain the luxury image's timelessness. However, many people do post on their own outlets about the brand's items.



SWOT ANALYSIS

STRENGTHS

- High-end positioning: THE ROW targets as a contemporary luxury brand. It is recognized for its simple, elegant, and high-quality design that appeals to high-net-worth individuals.
- Designer background: The brand was established by the Olsen sisters, Mary-Kate and Ashley Olsen, who bring strong brand appeal and loyal followers.
- Premium craftsmanship and materials: The brand's products require the selection of fabrics and superb craftsmanship, displaying timeless fashion design styles and building a solid reputation in market.
- Understated luxury brand image: Unlike the other heavily branded or flashy luxury brands, THE ROW presents a quiet and refined aesthetic that is seen to resonate with modern consumers.
- Global presence: With flagship stores and luxury department store distributions, the brand's image is well-established globally.

WEAKNESSES

- High costs: THE ROW is extremely expensive, resulting in limited size of potential customer base.
- Low brand awareness: Less strong are the signature signs within THE ROW compared to other brands such as Gucci or Louis Vuitton, resulting in lower brand awareness among the public.
- Dependence on specific markets: High dependence on the North American and European markets and low penetration in the Asian market.
- Narrow product line: High-end women's clothing and limited accessories are the mainstay, without diversification in growth (such as wholesale promotion of beauty items or men's lines) is not encouraged.

OPPORTUNITIES

- Expansion in the Asian market: The Row has a chance to expand its reach because demand for luxury goods in Asia, especially in China and Japan is growing.
- Sustainable fashion: The number of customers who value environment and society is increasing, which allow The Row compete by improving the sustainability of its products
- Digital marketing: Investment in e-commerce and social media would raise online sales and facilitate brand interaction with younger residents.
- Product line expansion: The expansion in menswear, lifestyle goods and perfumes to meet more diverse demands of customers.

THREATS

- Market competition: With competition from other similar luxury minimalism brands such as LOEWE and Loro Piana, the brand must retain its differentiation advantage.
- Economic uncertainty: Economic downturns or decreasing consumer expenditure may affect the performance of the luxury market.
- Emergence of new brands: Some new designer brands can pose market share pressure on THE ROW in the mid-to-high-end market.
- Cultural difference challenges: Brand's minimalist style does not match local taste aesthetics in some markets and hence requires strategic adaptation to accommodate regional requirements.

THE ROW

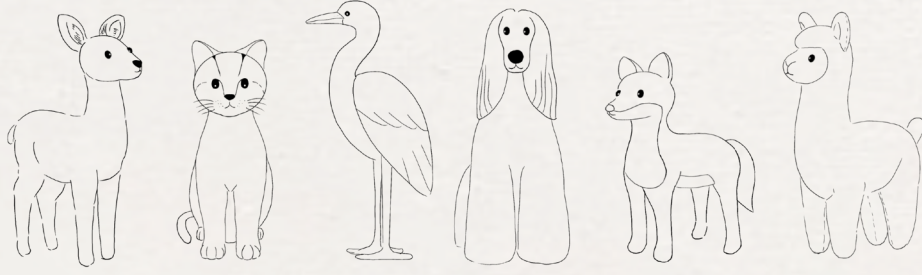


THE ROW STRATEGIC MARKETING- FIGURINE IP- THE ROW FAMILY

「Quiet Companionship, Reflections Of Life」

In The Row's minimalist, refined, and freeing universe, we envision a collection of animated "soul reflections" — six handcrafted figurine characters of felt wool and leather. Each captures the brand's lifestyle philosophy and emotional responsiveness, infuse warmth to still objects and create a healing, peaceful, and artistic IP world.

They are not toys, but friends, observers, and silent recorders. They represent elements of our internal selves: rhythm, contemplation, order, delicacy, playfulness, relaxation...



Keywords: Healing / Companionship / Contemplation / Serenity / Handcraft / Refinement / Elegance



MARKET ANALYSIS: THE DESIGNER TOY TREND

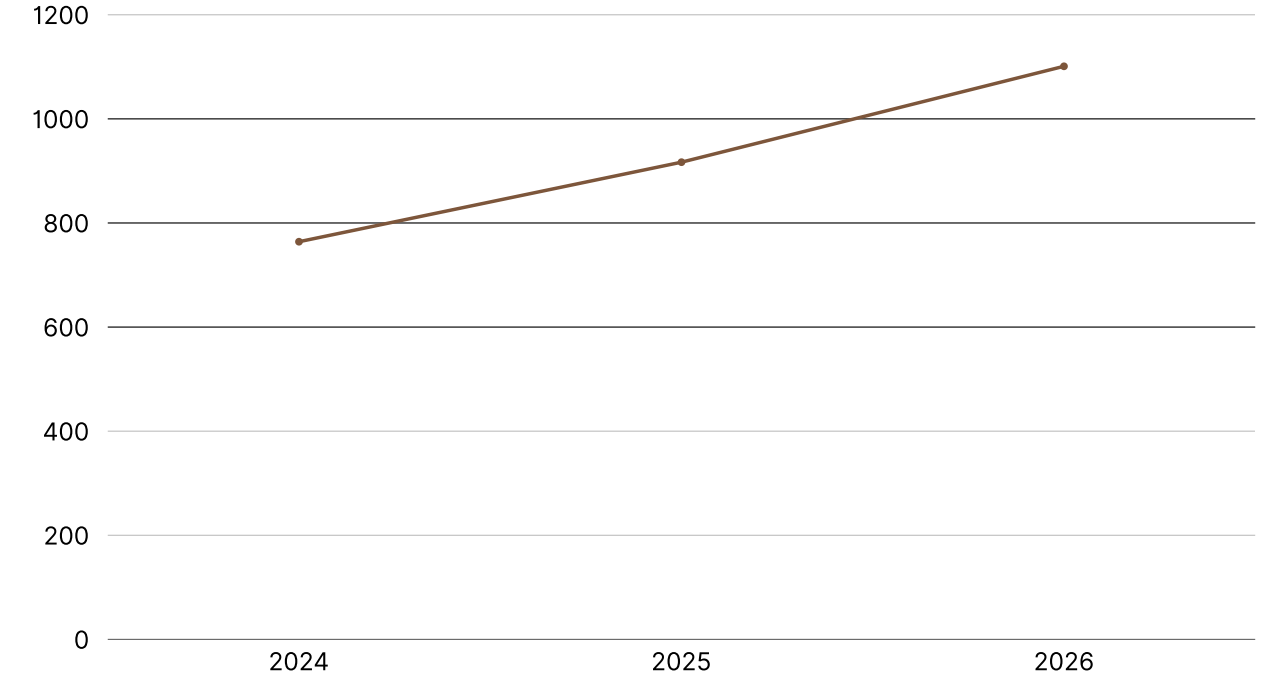
Market Background and Trend Overview

Designer toys have developed over the past several years from niche collectibles to mainstream consumer mania among Gen Z and developed into a cultural sector that weaves together collection, aesthetic expression, and social sharing. According to Statista, the Chinese designer toy sector will achieve RMB 76.4 billion by 2024 and RMB 110.1 billion by 2026 with a CAGR of 20% from 2024 to 2026. (China IP News, 2025)

From a consumer demographics perspective, designer toys have been cultural icons among young adults between the ages of 18 and 35, particularly among females, to convey feelings and a sense of individualism. Gen Z is willing to pay for companionship, healing, and relaxation. They are inclined to "emotional consumption" to seek psychological comfort in loneliness, stress, and fast-paced rhythm of urban life.

The rise in female purchasing power reflects a growing tendency toward self-pleasing consumption, where women seek products that embody aesthetic expression and emotional significance. At the same time, social media sites Redbook and Tiktok enhance this trend: user-generated postings about "blind box unboxings," "figurine photo styling," and "vacation check-ins with figurines" have transformed designer toys to powerful forms of social currency. They now serve as mediums of expression of identity and as bridges between consumer communities.

China Trendy Toy Market Size Forecast
Market Size (Billion Yuan)



Popmart Twinkle Twinkle Collections

MARKET ANALYSIS: SUCCESSFUL CASE STUDY

Pop Mart

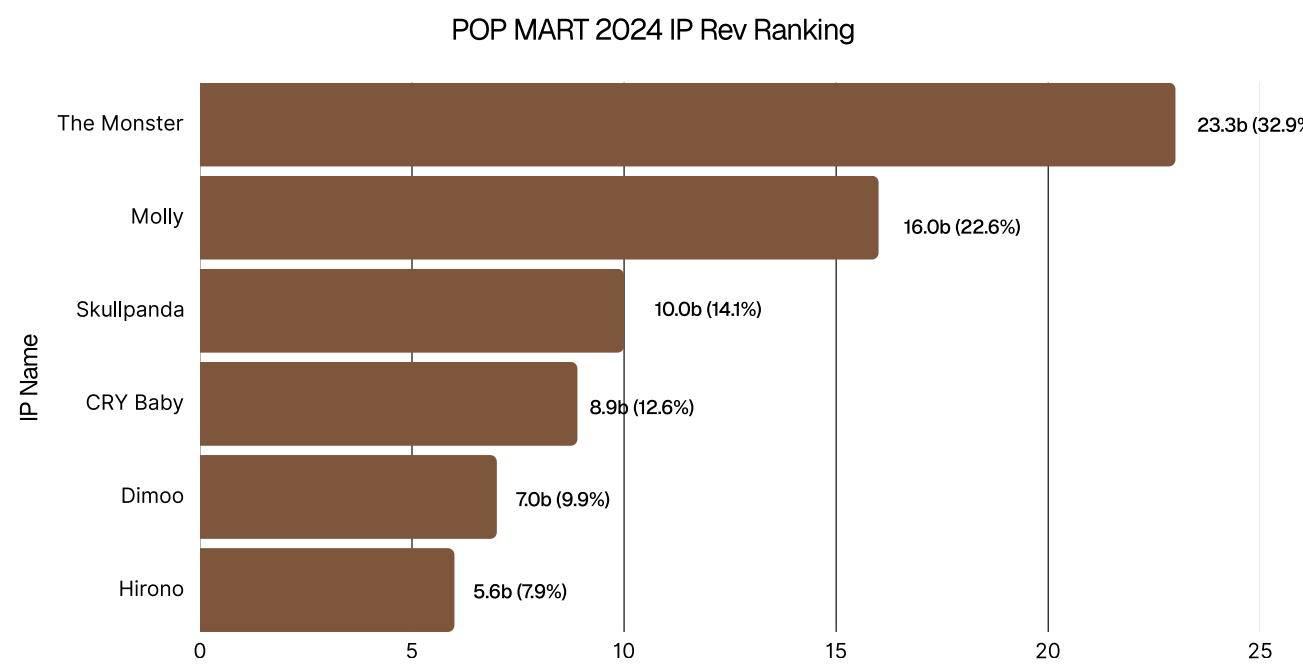
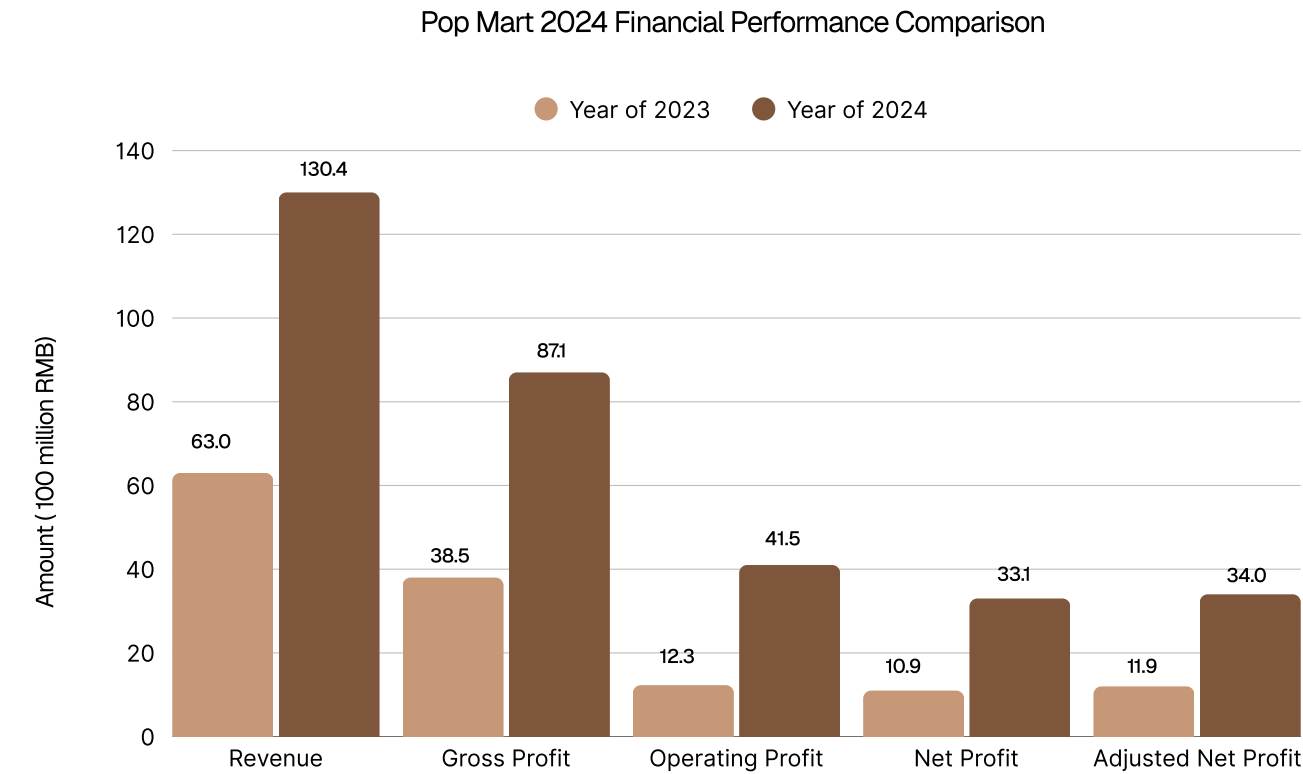
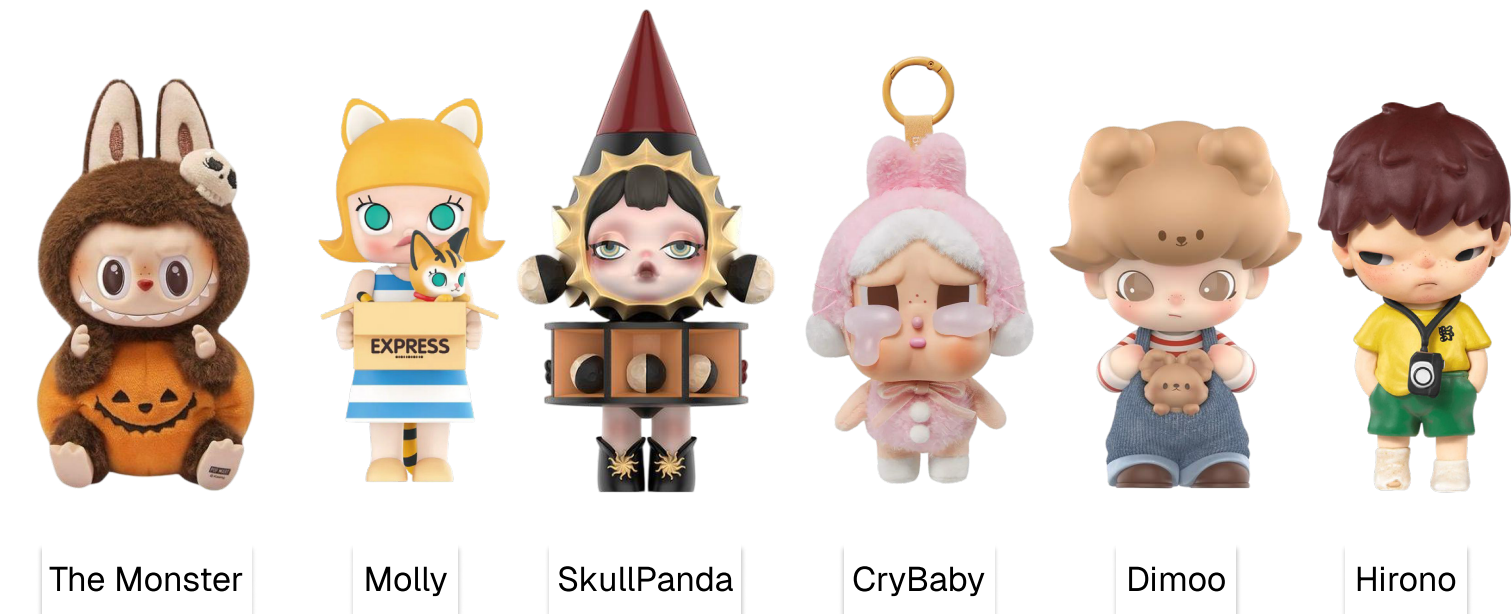
Pop Mart is the pioneer of Chinese designer toy business. By operating character IPs and the mechanism of blind boxes, the brand developed a collectible system that harmoniously integrates aesthetics, community, and social interaction. The company was able to turn designer toys that were originally niche collectibles into mainstream consumption. Its model triggered emotional consumption and community identity among Generation Z, which establishes Pop Mart as one of the most representative brands in Chinese new consumer culture.

The core consumer group is Gen Z's women between the ages of 18–35, with a keen interest in urban life and trend culture. Females account for about 65%–70% of its customer base.

According to Pop Mart's financial reports of 2024, Pop Mart achieved revenue of RMB 13.038 billion during the year of 2024 with a year-on-year growth of 106.9%. (Wang, 2025)

In the same year, 13 IPs contributed to over RMB 1 billion each in revenue, of whom four exceeded RMB 10 billion. The THE MONSTERS series led by the flagship character "Labubu" achieved RMB 3.041 billion revenue, a year-on-year growth of 726.6%. The performance surpassed MOLLY and made Labubu the largest revenue contributor to its company, accounting for 23.3% of total revenue. (Wang, 2025)

Pop Mart has captured buying behaviors of today's young generation. Its products—portable, collectible, socially sharable, set-completion oriented, and rarity-enhancing—are continuously driving purchase desire. Pop Mart's success validates powerful conversion potential of the "blind box collectibles + IP storytelling universe + limited-edition marketing". Through integrating product design, emotional connection, and community engagement, Pop Mart has transformed toys into cultural icons of Gen Z's aesthetics, feelings, and social identity. It offers a clear paradigm for future brands that attempt to build consumer engagement through IP-driven and community-based strategies.



MARKET ANALYSIS: SUCCESSFUL CASE STUDY



Jellycat

Jellycat is a high-end British plush toy brand whose design philosophy is softness, healing, and simplicity. It perfectly responds to post-pandemic consumers' higher demands for relaxation and self-healing. Jellycat products originally serve as comfort toys among children, now turn out to be adults' emotional substitutes and find their way to be "healing necessities" which are kept primarily in bedrooms, studies, or living room corners.

According to Euromonitor's 2023 report, 68% of Chinese Gen Z females claimed to have indulged in "self-healing consumption," with tastes favoring soft toys, fragrances, and handcrafted goods that can offer emotional support. Taking advantage of this trend, Jellycat promptly targeted its business beyond its core mother-and-baby base to the 25–40-year-old urban female market, of which females make up over 75% of its customer base. (Euromonitor's 2023 report, 2022)

Key performance data emphasizes this success

- In 2023, Jellycat's global revenue was £200 million (around RMB 1.85 billion), representing a 37% year-on-year growth. (Erdly, 2025)
- In the first seven months of 2024, its sales in China increased by 126.7% year over year, ranking first in the plush toy segment. (Erdly, 2025)

The Jellycat success demonstrates that products with strong emotional value and social-aesthetic expression can go beyond functions and age. The brand has become a symbol of high frequency consumption that is able to integrate companionship, aesthetic sophistication, and decoration purpose. The Jellycat success demonstrates that products with strong emotional value and social-aesthetic expression can go beyond functions and age. The brand has become a symbol of high frequency consumption that is able to integrate companionship, aesthetic sophistication, and decoration purpose. The development of Jellycat aligns with the changing lifestyle aspirations of modern urban women.



Summary of Consumer Demand for Designer Toys

Pop Mart and Jellycat's success proves that designer toys tend to be a fast-growing consumption category that combines emotional value, aesthetics, and social identity.

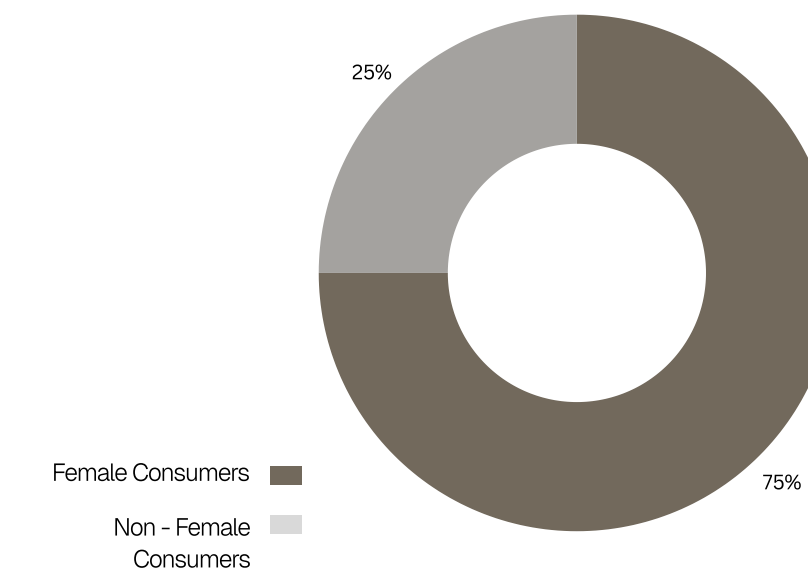
Consumer demand within this sector can be emphasized on four core dimensions:

- **Emotional Support** – companionship and healing roles that provide comfort and psychological relief.
- **Collectible Accomplishment** – limited editions and serialized designs that encourage the desire to collect.
- **Lifestyle Integration** – adaptation to residential environments and aesthetic appeal to photography and social media posting.
- **IP Storytelling** – character backgrounds and growth that foster long-term fan engagement and loyalty.

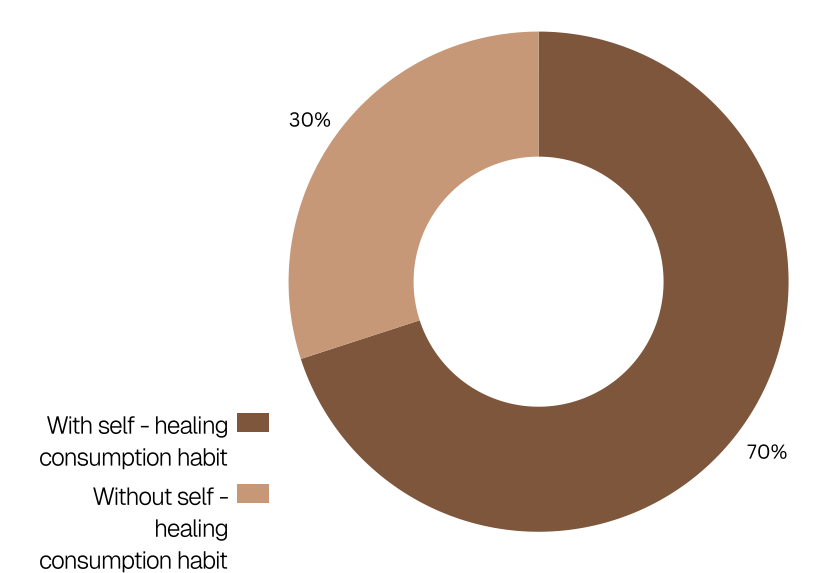
These four drivers define a clear course of direction for luxury brands to move into the world of designer toys. Minimalist, luxury aesthetics and the "quiet companionship" philosophy of The Row meet these consumer demands. By launching The Row Café Family, the figurines not only extend the cultural identity of the brand to day-to-day life but also offer consumers ongoing emotional connection and collectible motivation.



Proportion of Chinese Gen Z Women with Self - Healing Consumption Habit



Jellycat Consumer Gender Proportion



MARKET ANALYSIS: DESIGNER TOY TRENDS & THE ROW FAMILY BRAND OPPORTUNITIES

Rationale Of The Row Family Product Line Development

The concept of The Row Family caters specifically to the rising popularity of plush designer toys among Chinese consumers. As carriers of emotional intelligence, plush figurines increasingly appeal to young consumers. Their attraction lies in the representation of companionship, healing, and relaxation that have emerged as key drivers of emotional expenditures.

Additionally, The Row has always represented a brand philosophy of refined elegance and soft minimalist style, supported by its brand commitment to natural, soft, and refined materials like fine fabrics and leathers. These characteristics inevitably correspond to emotional traits associated with stuffed designer toys. Building on its assets in premium soft raw materials, The Row's expansion into a line of wool felt figurines not only reinforces its lifestyle positioning but actually directly fills consumer demand for products possessing emotional value, aesthetic collectability, and day-to-day appeal.

By introducing minimalist and warm wool felt figurine characters and narratives, The Row can move on from the luxury brand stereotype of being "distant and inaccessible." By maintaining its high-end sensibility, the brand strengthens its relatability while opening up into new emotional dimensions. As a new consumption touchpoint, wool felt figurines provide The Row with a way to connect with its two key target groups: young women and the family audience. It widens entry points beyond garments and promotes diversified and daily forms of consumption.

This strategy signals a wide shift among luxury brands: from being "aesthetic authorities" to being participatory curators of lifestyle. Wool felt figurines thus become not only soft bearers of brand culture but new media of communities sharing, consumer interaction, and strong emotional connections.



Future Brand Trends And Brand Impact

A designer toy IP will ideally push The Row further towards day-to-day life scenarios, developing the brand image from that of "minimal restraint" towards a lifestyle symbol of warmth, approachability, and companionship. Through the narrative of its family of wool felt figurines and immersive experience created by the café locations, The Row will develop a new brand lifestyle culture that deepens consumer engagement and sense of belonging.

Meanwhile, this extension will facilitate the brand making more powerful consumer stickiness, in order to create long-term emotional connections and maintain multi-scenario interaction on various touch-points.



THE ROW FAMILY WOOL FELT FIGURINE PRODUCT LINE

Figurine Design

- **Character Set:** The set will have 6 characters. The purpose is to balance the fun of full collection with diversity and uniqueness within characters.
- **Sales Mechanism:** Sold in uniform blind box packaging. Each box contains a random selection of characters, with one complete set comprising a full box containing 6 distinct characters.
- **Style:** The overall look adheres to The Row's minimalist and gentle brand identity.
- **Color Palette:** Low-saturation tones will be used to depict serenity and refined elegance.
- **Main Materials:** Cashmere & Merino Wool should be chosen for warm and exquisite touch.

Material Selection and Care

Primary Textiles: Wool
Supplementary Materials: Calfskin Leather, Goatskin Leather, Lambskin Leather, Soft Nappa Leather
Care Instructions:

1. Avoid washing with water; gently remove dust with a soft-bristle brush.
2. Prevent strong friction with rough surfaces.
3. For minor loose fibers, trim carefully with scissors instead of pulling.
4. Repairs can be arranged through in-store service appointments.

Pricing Strategy

When deciding prices, brand positioning, consumers' psychological price range, and overall luxury category pricing logic should be considered.

The Row, a minimalist luxury brand, promotes its plush figurine keychains as "high-end lifestyle accessories" rather than as ordinary toys. In the meantime, as an extension of the brand, The Row Family's pricing strategy follows both market benchmarks and production costs. Pricing considers the following factors:

- **Brand Premium:** The price should reflect The Row's luxury nature and established brand image.
- **Scarcity Premium:** Added value is given due to limited editions, collaborations, or handcrafted exclusivity.
- **Accessible Threshold:** The price should be lower than The Row's core ready-to-wear line but higher than that of normal plush toys. The pricing should balance between aspiration and affordability.

Comparable Market References

- Loewe Plush Keychain: approx. ¥2,000 – 3,000
- Burberry Velvet Keychain: approx. ¥1,500 – 3,000
- Loro Piana Cashmere Toy: approx. ¥32,000

Cost Analysis

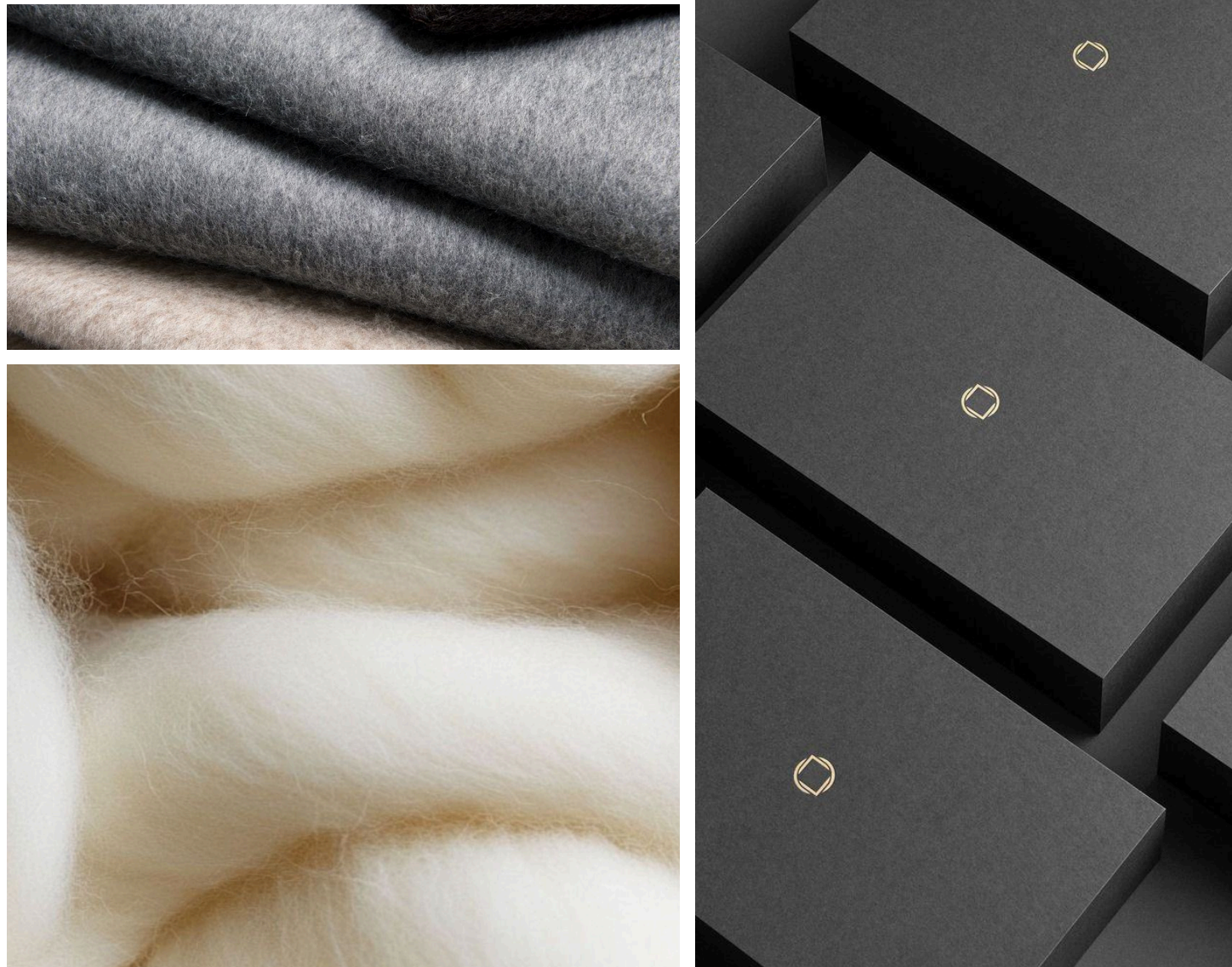
While the wool felt figurines use authentic materials such as wool, cashmere, calfskin, and goatskin, their miniature size and reuse of surplus fabrics from The Row's ready-to-wear and handbag lines lower the

Estimated Cost per Keychain:

- Raw materials (wool + small leather components): ¥150
 - Direct Labor: ¥500
 - Packaging (premium box and bag in The Row style): ¥30
 - Logistics and shipping: ¥10
- Total Estimated Cost: ~¥690

Proposed Retail Price

Each blind box keychain also retails at ¥1690, finding a balance between material quality, craftsmanship, and brand value with repair and maintaining accessibility compared with The Row's core products.



THE FIGURINE STORY UNIVERSE

Story Setting

On a tiny island called The Row, resides a group of quiet and harmonious friends who are passionate about life. They live a simple but elegant life by making clothing, painting and sunbath in the afternoon, and listening to the wind from wicker armchairs at sunset. They value the slowness of time, the softness of movement, and all that is associated with comfort such as the delicate fabric, the grain of ancient wooden chairs, the clarity of fresh air, and each other's companionship.

One morning, a glass bottle drifted on the shore. There is a letter inside from a distant city. The sheet was slightly yellow, and on it were written the words.

“Dear Finder of this Letter,
 I live in a place that is always running, weaving between tall buildings every day. Everyone seems so busy, yet inside it feels as though something is always missing.
 I long for a place where I can pause, drink a cup of coffee that carries warmth, and talk to someone without rushing.

— From someone searching for a slower life and companionship.”

The companions gathered quietly around the letter. No one spoke, but each of them knew the answer was already written in their hearts:
 “Perhaps we can bring the rhythm of our island into that world.”

And so, Riley, Auden and their friends left the island of The Row and arrived in a corner of the city, where they opened a fashion house — The Row.
 Here, it was for their visitors — creating a moment of “slow living” that belonged uniquely to each of them.



THE ROW FAMILY – BRAND FIGURINE MERCHANDISE PROPOSAL

Project Introduction

Figurine IP Project is The Row's new collection of products that were designed to match The Row's minimalist and elegant identity. The six figurine characters will be presented as wool felt figurine keychains and will represent The Row's philosophy on life and emotional sensibilities such as elegance, serenity, naturalness, concentration, and sophistication.

This collection will also maintain the brand's sustainability pledge by reuse of excess fabrics, furs, and hardware from The Row's ready-to-wear and handbag offerings. These will be reinvented as wearable and collectible lifestyle accessories. By presenting a series of wool felt figurine IP products that communicate healing and quiet chic, The Row will deepen its brand philosophy of minimalist elegance in consumers' minds and increase publicity for its commitment to softness, sophistication, and precision quality. Simultaneously, this series of products lowers the entry barrier to The Row, expanding the brand's reach, appealing to broader consumer sectors, and arousing curiosity from new consumers.

Additionally, the wool felt figurine keychains with their cozy and inviting look will also act as companions to consumers, reinforcing emotional ties and brand exposure through both daily presence and social coverage.

Product Differentiation: The Row Figurines × Companionship Culture

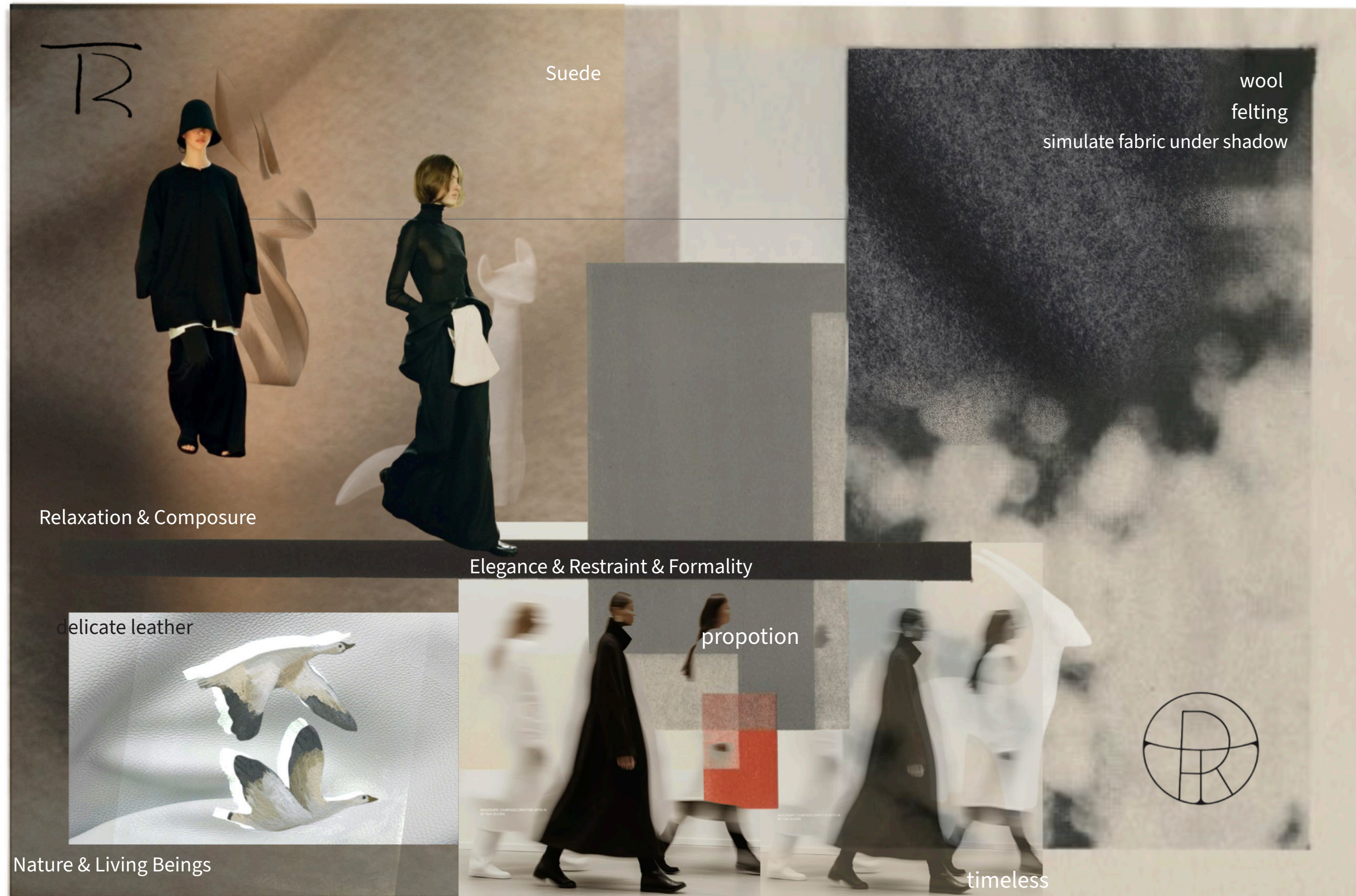
The Row's figurine collection pairs minimalist design language with premium materials in an attempt to capture the brand's unique sense of cool elegance and spiritual companionship. Diverging from other traditional IP figures, which primarily focus on “cuteness” or “trendiness,” The Row figurines stress on the combination of inner feelings, emotional extension, and daily rituals.

- **Design Philosophy Differentiation:** Each character takes inspiration from subtle fragments of human temperament and haute couture's aesthetic codes. Each figurine would be designed to match with a distinct philosophy of life.
- **Material & Craft Differentiation:** Handcrafted from wool and paired with natural leathers including goatskin and calfskin, the figurines strike a delicate balance between tactile feel and collectible value.
- **Brand Spirit Communication:** Through The Row's aesthetic lens, the figurines communicate quiet companionship and intimate moments, further projecting the brand's low-key luxury lifestyle to new emotional dimensions.



Figurine charater	Personality	Representative animals	Symbols
Riley	Grace & freedom	Snowy Egret	Quiet rhythm of life
Auden	Calmness & artistic sense	Afghan Hound	Elegance and composure
Gray	Sensitivity & observation	Persian Blue Cat	Urban solitude and contemplation
Melo	Independence & rationality	Rusty Fox	Contemplation and inner clarity
Dree	Reservedness & warmth	Golden Fawn	Gentleness and openness
Tilda	Lightness & quiet humor	Cream Alpaca	Ease and naturalness





The moodboard is not an imitation of The brand, but a translation - transforming the elegance, restraint, maturity, tranquility and composure of The Row into a tangible visual philosophy through materials, light and shadow, proportion and

THE ROW FAMILY FIGURINES: PRODUCT OPERATION AND MARKETING PLAN

Product Development Stages

Stage 1: Initial Character Launch

Release the initial set of 6 wool felt figurines, considered to match with The Row's signature minimalist aesthetic and refined materiality.

Stage 2: Narrative Expansion

Create The Row Family story world, extending from the initial characters to increase consumer engagement through narrative consistency.

Stage 3: Sustainability Integration

Add The Row's philosophy of sustainability by upcycling excess premium materials from the ready-to-wear collection and adopting eco-friendly fillings. These steps give the figurine a "clothing upcycling" background, which reinforces cultural value and environmental consciousness.

Pre-Launch Warm-Up Period: November – January

- November 27: Release "countdown-style" figurine story posts with characters' daily moments and corresponding New Year and winter styling scenes.
- December 1: Officially launch the "Christmas & New Year Limited Companionship Calendar" campaign and guide user-participated content contributions.
- December 20–January 1: Publicize an exclusive gift-with-purchase mechanism to stimulate holiday sales conversions.

Event Objectives

- Use the holiday season as a platform to boost the value of a "healing IP", stressing on the emotion of gifting and gatherness.
- Enhance brand awareness and anticipation for the upcoming of The Row Family Line.
- Use Christmas and New Year marketing scenarios as a bridge to convert offline engagement into online purchasing power.

Sales Channels

On-Site Exclusives

Limited in-store sales only at The Row to encourage foot traffic and in-store check-ins.

The Row Official Mini Program / Online Store

Parallel e-commerce from The Row's own online platforms for diversified consumer coverage.

Designer Toy Store Collaborations & Lifestyle Concept Store Collaborations

Partnership distribution with specialty toy purchasers and lifestyle boutiques for additional visibility and diversified sales channels.

Social Media Communication Mechanism

- Redbook Hashtags
#MyTheRowCompanion, #FriendFromTheRowIsland, #MyDailyLifeWithTheRowFigurines, #ChristmasWithTheRow, #NewYearWithTheRow.
- Consumer-Generated Content:
Encourage consumers to share photos of figurines in daily scenarios such as street photography, outfit pairings, or home décor styling.
- Community Interaction:
Regularly initiate interactive content such as "Character Weekly Journals" and "The Row Islanders in the City", fostering an engaged IP-based community

Figurine Purchase Mechanism & Limited-Edition Surprise Campaigns

Proposed Purchase Mechanism

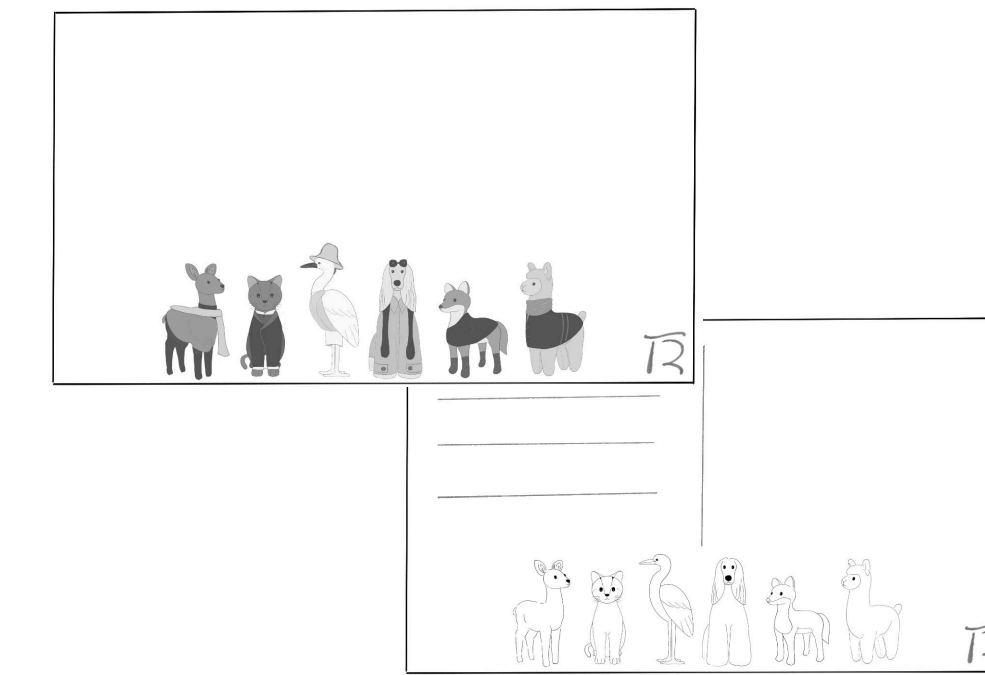
Character Sticker Gift:
Each figurine comes with an exclusive character sticker (randomly selected from five Christmas/New Year-themed daily designs).

Limited-Time Lottery (Pre-opening to January 1st)

- Any in-store purchase qualifies for entry into a prize draw:
- Third Prize: The Row Family figurine postcards
- Second Prize: The Row Family cotton makeup bag
- First Prize: Wool Felt figurine blind box keychain

Sharing Rewards:

Consumers who post on Redbook or Weibo with the hashtags #MyTheRowCompanion, #ChristmasWithTheRow, #NewYearWithTheRow, #FriendFromTheRowIsland, or #MyDailyLifeWithTheRowFigurines will be eligible for a special Christmas & New Year surprise gift. The top ten posts ranked by likes will receive rewards.



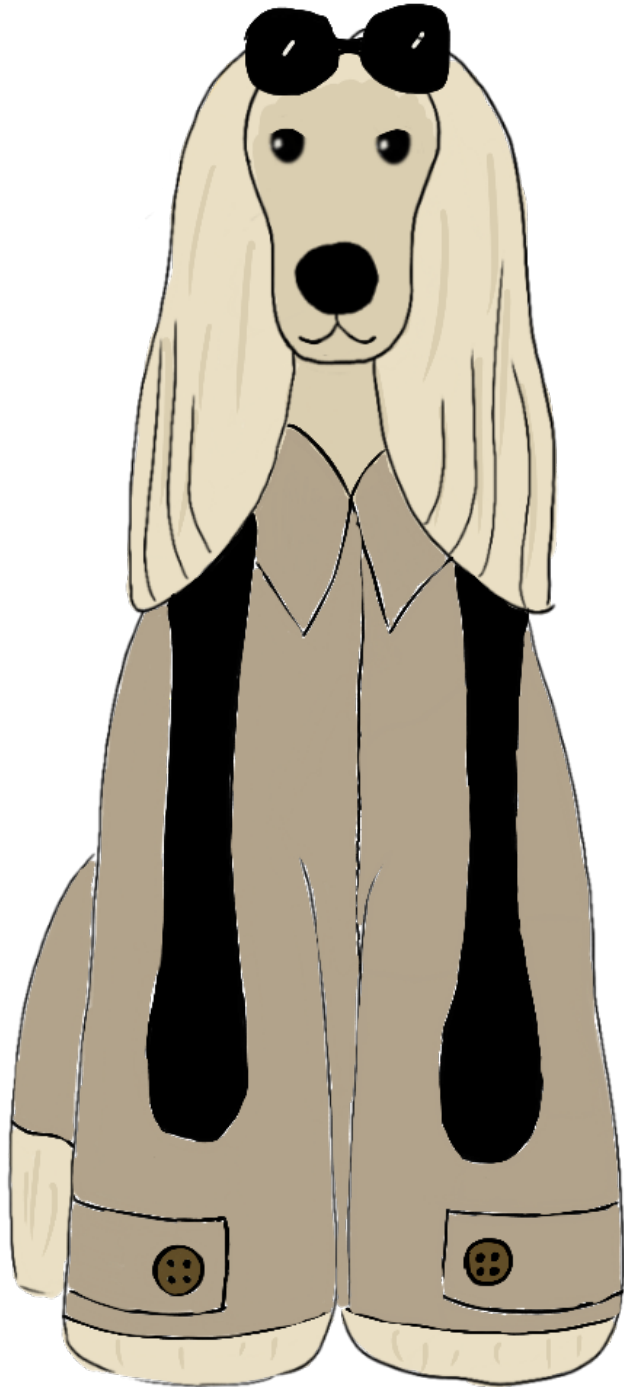
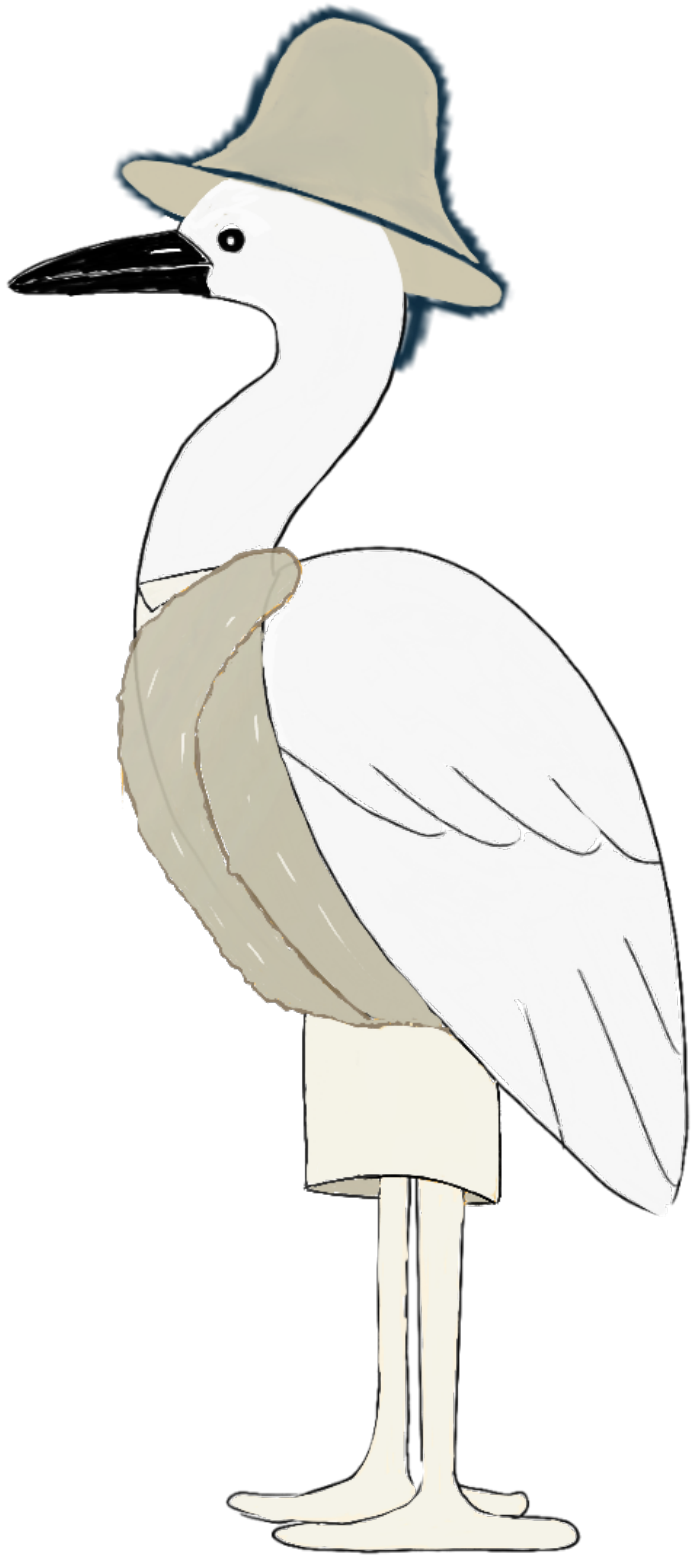
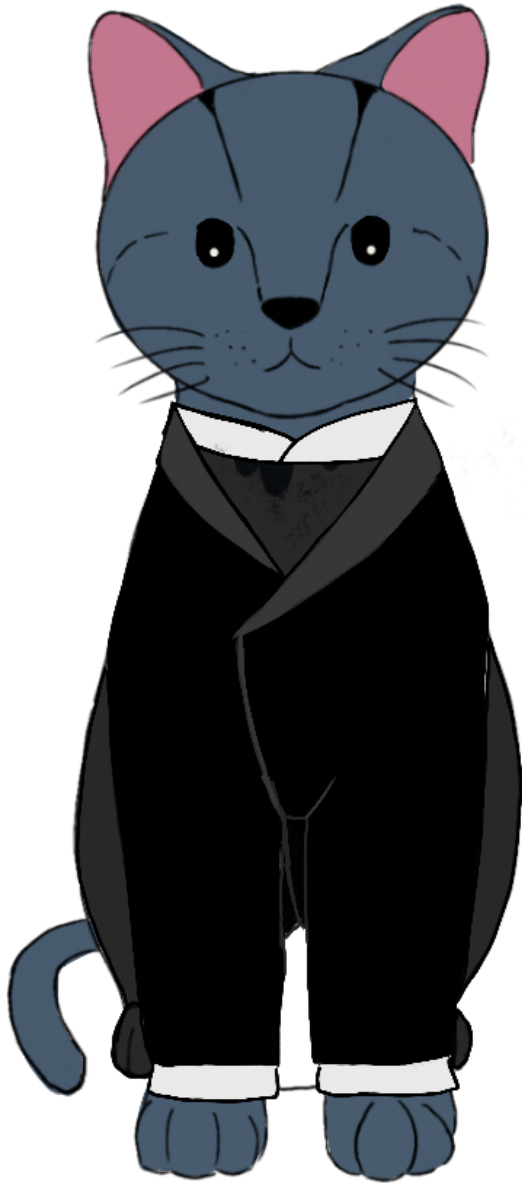
Third Prize, The Row Family Figurine Postcards

PROPOSAL REFLECTION

This proposal aims to introduce a new figurine product line that infuses The Row with greater emotional value and visual appeal. By promoting themes of healing and companionship, the project seeks to capture the interest of young consumer groups while enhancing the brand's visibility and user engagement on social media. The inclusion of figurine characters establishes more relatable emotional touchpoints, fostering two-way communication between products and the brand.

However, within the current plan, certain gaps remain in terms of promotional continuity and the depth of consumer engagement scenarios. Future initiatives will prioritize celebrity endorsement and co-creation with consumers. Examples include collaborations where celebrities demonstrate product use, or offering figurine blind boxes as gifts with the purchase of The Row handbags. These approaches can create playful, narrative-driven product experiences.

Subsequent marketing will follow a closed-loop strategy of Character Design → Product Line Integration → Celebrity Influence → Consumer Feedback → Secondary Dissemination. This ensures that the brand not only builds appeal through visuals and storytelling but also relies on authentic consumer participation and sharing. By driving natural UGC expansion, The Row can generate long-tail impact and higher conversion rates, while avoiding the risk of short-lived topical buzz.



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