MATS34511
Fashion Business In The Digital Age
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ellesse
Consultancy Report



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Executive Summary

This reportthoroughly investigates Ellesse's position in the rapidly changing fashion and sportswear industry, emphasising the necessity for strategic innovation to revitalise the brands market presence, specifically within the realm of product innovation.

Ellesse is struggling to compete in the competitive and saturated market. As a result of the brand's stagnant approach to innovation in a market characterised by rapid changes and shifting consumer tastes, they have been overshadowed by other players in the market. This report explores the factors potentially leading to Ellesse's lack of brand recognition and consumer enegagement. Additionally, it looks at how using technology to innovate their products could have a revolutionary effect on reviving and enhancing the brand's reputation in the marketplace.

Thanks to technological advances, there are a plethora of opportunities for organisations willing to take the effort to establish a meaningful connection with fashion customers worldwide in the digital age. According to research by BoF-McKinsey (2022) companies in the global fashion sector should invest in digitalisation, to obtain considerable cost advantages throughout the production process.

It is recommended that Ellesse embrace the use of smart materials in order to transform their product line by skillfully fusing enhanced utility with stylish design. The goal of this strategic approach is to provide customers with unique and creative products that meet their evolving needs and in turn, improve the brand's psoitioning within the market and competitiveness.



Brand Background

Ellesse is an Italian brand founded in 1959 by Leonardo Servadio whom had a vision to merge cutting- edge technology with refined Italian style. With a rich heritage in sports, Ellesse's product line grew to encompass tennis and other sports-related apparel and footwear after initially concentrating primarily on skiwear. Ellesse seeks to achieve the perfect balance between functionality and style by infusing their sportswear products with a dash of Italian flare (Ellesse, 2022), and they inspire fashion forward people both on and off the sports field with their vibrant, passionate, and creative brand personality.



In 1994, Ellesse became part of the Pentland Brands family. Pentland values sustainability, innovation, and takes pride in producing brands with a social purpose that aim to leave a positive impact on people and the envioronment (Pentland, 2023).

Refer to Appendix A to see a Value Chain Analysis for Ellesse, which clarifies their core competencies as a brand.

The Consumer

Ellesse generally targets fashion forward people within the generation Z cohort (Mintel, 2020). Growing up in a time of tremendous technical advances, Gen-Z is frequently characterised as being tech-savy and having the natural ability to adapt to and flourish in todays digital enviornment, as well as being more open to trying new things (Statista, 2023).

Consumer's of Ellesse may percieve the brand as a reflection of their passion for both sports and fashion. Additionally, Gen-Z shoppers in particular have a growing desire for sustainability and a more interactive and personalised shopping experience, with nearly 9 out of 10 Gen-Z shoppers expressing an interest in AR/VR shopping experiences (Statista, 2023). As a result, Ellesse must constantly innovate in order to satisfy their customers.

Considering this, it can be assumed that the majority of Ellesse's Gen-Z consumers would fit into the early adopter and innovator categories for technology on Rodger's Adoption Curve (*Figure 1*); meaning that these individuals are more likely to adapt and utilise new technological advances before others (Rodger, 1983).

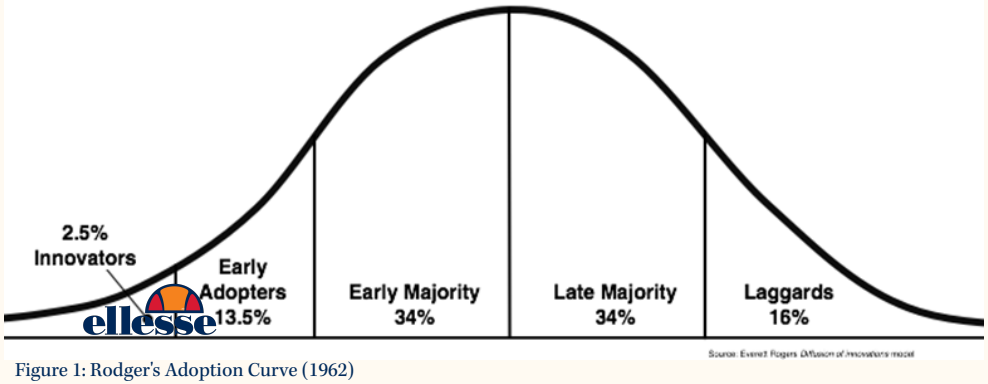


Figure 1: Rodger's Adoption Curve (1962)

Competitor Analysis

The global sportswear market has been expanding and is expected to continue doing so in the future (Appendix B). As a result, Ellesse has constant opportunities for growth, but they need to take into account their competitors (Appendix C). A crucial component of situational analysis is completing a competitor analysis (Figure 2), which involves reviewing the goods and services that rivals provide, and how consumers react to them (Chaffey, 2014). This will help Ellesse to better understand how they can differentiate in the market and create USP's to stand out from competitors and gain market share.

Likewise to Ellesse - Nike, Adidas, and Puma also combine athletic and leisure wear and target a global market. An analysis of these competitors is shown in Figure 2, which includes some of their core competencies as well as examples of how they are utilising technology to innovate their products and services. Ellesse must embrace and integrate emerging technologies proactively into their products and services in order to not only serve to their tech-savvy consumers, but also to strategically differentiate themselves in this increasingly saturated and competitive industry (Figure 3), ensuring a dynamic and innovative presence.

Porter's 5 Forces Framework

Threat of new entrants: Low/ Moderate

Bargaining power of buyers: High

Bargaining power of suppliers: Moderate

Threat of substitutes: High

Competitive rivalry: High

Figure 3: Adapted from Porter's 5 Forces Framework (1979) (Authors own, 2023)

Competitors	Competitive Advantages and Unique Selling Points
Nike	• Nike's marketing approach is centred on building deep, emotional bonds with consumers through events, sponsorships, and advertising. To reach their target demographic and increase brand awareness, they employ a range of marketing methods, including influencer and social media marketing, and inspirational advertisments. (Mlilo, 2022). • Nike is well known for their dedication to innovation. They make significant investments into research and development to produce innovative technologies that improve the durability, comfort, and performance of their products. Flyknit, Dri-FIT fabric, and Nike Air technology are a few examples (Nike, 2023). • They utilise technology to create immersive retail experiences- for example thier five story Nike shop in Soho, London where consumers can not only make purchases but can also play sports. There's an enclosed football trial area, a basketball half-court with adjustable hoops and digital video screens, a shoe customization bar where customers can fully customise a pair of Nike Air Force 1s, touchscreens embedded into every wall and dedicated coaches available (Future Stores, 2019). • High quality and customisable products. • Market leader for sportswear and strong brand loyalty and awareness; approximately 96% brand awareness and 37% brand loyalty in the UK (Statista, 2022)
Adidas	• Brand awareness at approzimately 93% in the UK (Statista, 2022). The brand is recogniseable through its logo and is often associated with a rich sport heritage. • Adidas invented the Speedfactory concept, a rapid production method that combines automation and innovative manufacturing techniques to create customised and locally-made footwear. Reduced environmental impact and more responsive production are made possible by this project (Hellyer, 2023). • Known for innovative products, for example their 'boost technology' materials that improves the performance of Adidas footwear by offering comfort, energy return, and responsive cushioning (Adidas, 2023). • Innovative 'Futurecraft' footwear which is 100% recycable as it is made entirely of recyclable TPU and promotes circular fashion (Adidas, 2023). • Has an app where consumers can virtually try on shoes using AI, engage in sports challenges, get personalised training plans and more.
Puma	• Likewise to Ellesse, Puma has positioned itself as a brand that produces not only sportswear but also streetwear, thus appealing to a broader consumer base. • Puma often creates limited-edition collections by collaborating with celebrities and designers - for example their Fenty x Puma collection (Puma, 2023). • Innovative products - Puma has a self lacing shoe that responds to athletes and their environment; the shoe knows how tight or loose it can lace around the wearers foot. • Taking actions to become a sustainable brand - for example their "Design to Fade" biodesign product which uses bacteria to dye fabric (Puma, 2023). • They have a running jacket with LED lights and bluetooth into the architecture of the jacket so that it can be connected to phones and create a safer running experience, esepcially at night (Puma, 2023). • Puma's retail locations often feature creative and eye-catching designs which adds ambiance and creates a distinctive and engaging shopping experience for their consumers.

Figure 2: Competitor Analysis (Authors own, 2023)

SWOT Analysis

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
• Shows social responsibility can be seen through their charitable efforts. • By using natural dyes and recycled polyester in their collections, Ellesse shows a dedication to sustainability (Pentland, 2021). • Rich history and strong brand reputation, especially in the tennis and sportswear market, which has lead to increased brand awareness. • Demonstrates a strong ability for establishing significant partnerships with prestigious companies such as Michael Kors and Tomorrowland (Ellesse, 2023). • Combines the practicality of sportswear with stylish design.	• Social media marketing is underutilised. • On Trustpilot.com (2023) Ellesse is overall rated 'bad' with many customers complaining about poor customer service and long delivery times. • Negative brand perception - considered a forgotten brand (Appendix E). • Limited innovations in products and services (Appendix F) • Limited range of products compared to their competitors. • No flagship stores - the company may not be able to fully capitalise on the potential of experiential and immersive retail experiences.	• The growth in fitness-conscious consumer and the activewear market (Appendix B). • Technological advancements can provide Ellesse with the opportunity to integrate new technology into their products and services. • Ellesse can expand into emerging markets or regions that are experincing a growing demand for sportswear. • Keep up to date with and capitalise off of new fashion and sports trends. • If Ellesse enhance their online presence and marketing efforts they can attract more consumers to their brand. • Ellesse could open their own stores and capitalise off of immersive experiences.	• Intense competition in the market (Figures 2 and 3). • As Ellesse has overseas suppliers (as discussed in Appendix A), they could potentially face disruptions and delays in their supply chain. • Rapidly changing fashion trends - risk of becoming outdated. • As showin in Figure 3, there is a high level of substitute products in the market and therfore bargaining power of buyers is also high. • The rate of inflation is gradually increasing, which is changing consumer purchasing behaviours, less people are buying non-essential items.

Figure 4: SWOT Analysis for Ellesse extracted from Appendix D (Authors own, 2023)

Pain Points

To support long-term business success, Ellesse should address and attempt to mitigate the threats and weaknesses shown in the SWOT diagram (Figure 4 and Appendix D). The SWOT analysis is a useful technique for pinpointing pain points that need to be strategically addressed.

1. **Lack of Innovation and Differentiation:**
A lack of innovation and utilisation of emerging technologies in Ellesse's products and services alongside a limited product range compared to competitors jeopardises Ellesse's relevance in the industry and may result in a loss of market share.

2. **Perceived as a 'Forgotten Brand' (Appendix E):**
Decreases brand reputation, market relevance, competitive advantage and could possible deteriorate consumer trust and loyalty. By innovating their products and services Ellesse could gain more popularity.

3. **Lack of Flagship Stores and Experiential Retail:**
Missed opportunity to build strong bonds with consumers through engaging and immersive shopping experiences.





PESTEL

P- Political	• The UK's exit from the EU was the most significant change in the global trading landscape in decades. With the EU accounting for 75% of the UK's fashion and textile exports and more than 30% of the sector's imports, the effects of the Brexit on the fashion industry are enormous (Hemingray et al., 2023) • Brexit has predominantly changed VAT, pricing, and the ease of which European shoppers can order and receive fashion goods. In addition to increasing costs for EU consumers, paperwork for exports can result in much longer lead times (Skeldon, 2022). • Due to the implementation of new visa requirements for employment in the UK following Brexit, as well as the migration of non-UK citizens back to their home countries during the pandemic due to furloughs or layoffs, many UK-based companies are currently experiencing difficulty in locating employees with the requisite skill set (Hemingray et al., 2023). • The conflict in Ukraine was ranked as one of the top three concerns for 2023 by participants in a recent BoF-McKinsey State of Fashion (2022) study. According to 58% of executives in the sector, the prolonged conflict in Ukraine has severely interrupted supply lines and created an energy crisis, which could negatively impact the fashion market.
E- Economical	• Increased tariffs may result in a surge in production costs as well as negatively impacting the supply chain (Fashion Law Journal, 2023) • According to the results of the BoF-McKinsey State of Fashion Survey (2022), 85% of fashion executives believe that the market will continue to be challenged by inflation in upcoming years. • The price of cashmere and cotton has risen by 30% and 45% annually (McKinsey, 2022). • Men's apparel spending hit £7.2 billion during the pandemic in 2020, while women's clothes spending peaked at £12.3 billion pounds. Since then, however, these figures have decreased, with the average spending on clothing being at 9.4 billion pounds (33 percent less than 2020) for women and 5.3 billion pounds (37 percent less than 2020) for men (Adegeest, 2023). • In the UK, 92% of households as of January 2023 said that their cost of living had increased significantly from the previous year (Statista, 2023). As a result, consumers have less disposable income- approximately 64% of adults in the UK are spending less on non-essentials (Office for National Statistics, 2022).
S- Social	• Consumers expect more long-term sustainability, ethically sourced materials, and increased transparency from brands and the products they buy. (Fashion Law Journal, 2023). • Changing consumer purchasing patterns due to factors such as rising cost of living and disposable income. Some consumers will delay or reduce discretionary purchases, while others will look for deals, which will raise demand for off-price, rental, and resale items. Fashion industry leaders should modify their business strategies to safeguard client loyalty (McKinsey, 2022). • The popularity of gender-fluid fashion is growing as consumer perceptions of gender identity and expression shift. The blurring of the boundaries between men's and women's clothing will force many businesses and retailers to reconsider their marketing strategies, product designs, and in-store and online shopping experiences (McKinsey, 2022). • A rise in fitness-conscious consumers has increased demand for sportwear, fueling the growth of the activewear industry (Appendix B). Additionally, due to the rise in popularity of streetwear, more consumers are combining activewear with their own personal style (Statista, 2023).
T- Technological	• Research from BoF-McKinsey (2022), suggests that the global fashion industry should invest in digitalization to gain significant cost advantages throughout the production process. This may be achieved by solutions such as automation and digital end-to-end integration. • As consumers spend more time online and the hype surrounding the metaverse continues to spread into virtual goods, fashion leaders will discover new innovative ways to engage with high-value younger cohorts (McKinsey, 2022). • 81% of Gen-Z played video games in the past 6 months, averaging 7.3 hours per week (McKinsey, 2022). • Social commerce is experiencing a surge in engagement from brands, consumers and investors (McKinsey, 2022). Social commerce involves leveraging social media networks to facilitate the buying and selling of products or services. Brands should increase their focus on bespoke in-app purchase journeys and explore opportunities in technologies such as livestreaming and augmented reality. • Generation Z desires an online buying experience that is tailored to their interests and preferences. The integration of personalised product recommendations and services is one of their most desired e-commerce advancements. Furthermore, Gen-Z and millennials, are fascinated by virtual reality (VR) and augmented reality (AR). A 2022 survey found that over nine out of ten Gen Z consumers were interested in VR/AR retail experiences (Statista, 2023).
E- Environmental	• The UK passed legislation in 2019 to achieve Net Zero emissions by 2050. Businesses are being urged by the UK government to take the lead in achieving this goal (Hemingray et al., 2023). • 8-10% of all emissions and waste worldwide are caused by the clothing industry, which uses a lot of water and emits a lot of carbon dioxide. The fashion industry's detrimental effects on the environment have been amplified by fast fashion, which places priority on quick and inexpensive production at the expense of supply chain social and environmental standards. Disasters like Bangladesh's 2013 Rana Plaza collapse have resulted from this (Hemingray et al., 2023). • As global temperatures rise, fashion leaders must not only expedite efforts to reduce emissions but also include climate hazard resilience into their strategies (McKinsley, 2023).
L- Legal	• Trade policies may include provisions with regard to environmental standards, labour rights, and fair trade practises. Compliance is an important factor that fashion brands take into account when making decisions (Fashion Law Journal, 2023). • The UK Modern Slavery Act 2015 lays out the legal obligations that the UK Government has placed on organisations to handle with and disclose instances of modern slavery (Lawbite, 2022).

Figure 5: PESTEL Analysis (Authors own, 2023)

KEY POINTS

As displayed in Figure 5, the fashion industry is faced with a constantly changing environment that is influenced by political, ecenomical, social, technological, environmental and legal factors.

As highlighted in the consumer analysis, Ellesse predominantly caters to the tech-savvy Gen-Z demographic. Consequently, the social and technological aspects of the PESTEL analysis are the key dimensions for Ellesse to focus on. As Ellesse's target market is primarily made up of early adopters of technology (Figure 1), the company must actively embrace new technical developments. Not only is it crucial to maintain competition, but constant innovation in goods and services also plays a major role in winning over the high-value tech-savvy user base.

As seen by Figure 5, Figure 6 and Appendix D, technology offers the most opportunities for Ellesse. Opportunities are abundant in the digital age, thanks to technological advancements, there have never been more opportunities to establish a genuine connection with fashion consumers worldwide for companies who are prepared to take the initiative (McKinsey, 2022). Conversely, disruptive factors (Figure 6) need to constantly be monitored. Ellesse's ability to identify and adjust to these elements can determine its level of success in the highly competitive marketplace.

PUSH

-Changing prefernces and purchasing behaviour among consumers.
-Competitors are utilising technology to innovate, giving them a competitive advantage in differentiation in the market.

PULL

-Seize opportunities for growth and innovation offered by new technology.
-Capitalise on emerging trends and market shifts.
-Increasing demand for both activewear and streetwear.

Figure 6: Push and Pull Model (Authors own, 2023)

Digital Growth Opportunities for Ellesse

Innovation is essential for businesses to have a competitive edge and is becoming more and more crucial for organisations' long-term strategy and success. Four main categories can be used to group innovations: retail model innovations, marketing innovations, merchandising innovations, and product/process innovations (Jin and Cedrola, 2017).
Although certain aspects of each innovation category would be advatageous for Ellesse to adopt, this report will focus primarily on how product/process innovations can be utilised by Ellesse.

Ellesse should place a high priority on product and process innovation because it is a vital catalyst for gaining competitive advantage in the rapidly changing fashion sector. To be relevant in a time when technology is changing the industry and consumer preferences are constantly evolving, companies must embrace innovation in their processes and product development. Additionally, innovation promotes a continuous improvement culture, which will help Ellesse to satisfy consumer demands with agility and achieve sustainable growth. Within a fashion ecosystem that is becoming more and more influenced by digital transformation, product/process innovation becomes a critical strategic requirement, guaranteeing that Ellesse not only adapts to changes in the industry but also leads the way in developing innovative solutions that appeal to modern customers.

Reasons for Ellesse to Innovate their Products/Processes:

- Multiple competitors in the sports and athleisure industry are continually making investments into new product developments. Compared to competitors, (Appendix F) Ellesse underutilises technology for innovating their products.
- Appendix D highlights that Ellesse has a negative brand perception and offers a limited amount of products compared to their competitors as well as having limited innovations in their products.
- Distinctive and innovative goods can promote brand uniqueness and make Ellesse stand out in the congested market.
- High level of substitutes in the market means that Ellesse has to find unique ways to make their products stand out to consumers.
- Figure 5 shows that there is an increasing demand by consumers for technology and unique products and experinces.

Technological Advancements Driving Product Innovation:

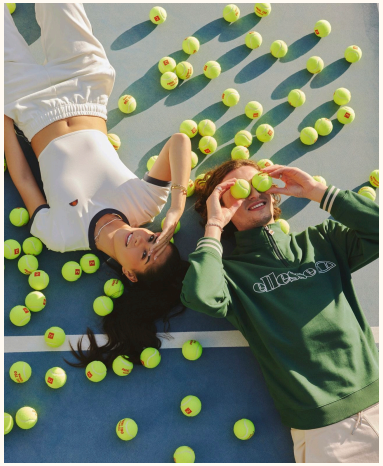
- **Smart fabrics and wearables**: Smart fabrics have a similar appearance and feel to regular textiles, but they are equipped with sensors and other tech components (such as intelligent textiles, electronic textiles, or e-textiles) that enable them to detect and react to their surroundings. Wearable devices with sensors can be utilised to protect weares from heat, exhaustion, and injuries (VigiLife, 2022).

- **3D Printing**: The process of turning a digital three-dimensional model into a tangible object. Though the technology of 3D printing has been around for a few decades, interest in it has recently begun to grow. The rise of new technologies that help with printing speed and dependability, such as artificial intelligence and Internet of Things (IoT) networked sensors, contribute to this growing interest. Due to its many benefits, which include increased flexibility, cost effectiveness, quick design, and low waste, 3D printing has also become more and popular with fashion companies (Buc, 2023).

- **Digital design tools**: Advanced softwares such as CAD (Computer-Aided-Design) simplifies the design process by enabling digital prototyping, pattern creation, and virtual design, which can reduce the need for samples.

- **Biofabrication**: Through a process of bioengineering, biofabricated textiles are materials grown from live microorganisms, such as bacteria, yeast, algae and fungi root structures an can be used to dye materials. . It is not necessary to develop or cultivate any arable land, use pesticides, or utilise a lot of chemicals or water during the manufacture of biofabrics, making it more environmentally friendly (Plank, 2020). Many competitors around the world are already disrupting the fashion industry using biofabrication.







Recommendation: Utilise Smart Materials

Ellesse should use smart materials strategically to innovate their product line, notably in the realm of sportswear geared towards tennis and skiing. Smart materials provide numerous benefits that complement Ellesse's dedication to producing functionable and fashionable clothing. Ellesse may improve the entire functionality and performance of its sportswear by combining materials with adaptive qualities such as moisture-wicking, temperature regulation, and impact resistance. This would enable the brand to cater to the demands of athletes and sports enthusiasts, as well as providing them with a USP to differentiate from competitors in the market.

Many textile firms and fashion brands are currently developing smart connected clothes, and the market share is predicted to expand by 2.36 billion pounds with a CAGR of 14.84% from 2021 to 2026 (Technavio, 2022).

What are Smart Materials?

- Smart materials refers to technologically adapted textiles that can sense and process the wearer's status as well as monitor and adapt to environmental data. A wide range of inputs and outputs are used, including electrical, thermal, mechanical, chemical, magnetic, and more (Fabriclore, 2023).
- Ellesse can employ smart fabrics to improve clothes' visual appeal, functional efficiency, and ability to interface with their environment and other technologies.

Using smart materials differentiates products in a crowded market by showing a dedication to innovation. This has the potential to improve brand perception and draw in customers looking for innovative and high-tech products.

How can Smart Materials be used to innovate products?

- **Aesthetics:** Aesthetically pleasing smart textiles could, for example, shine and change colour, feature an interactive element, LED lights or adapt to their surroundings by using hotochromic, thermochromic, electrochromic, and solvatochromic materials.
- **Improve and monitor performance**: Smart materials can be used to monitor physiological processes like heart rate and muscular activity, exposure to radiation, regulating the user's core temperature, and minimising wind and water resistance are all part of maintaining one's health (Fabriclore, 2023).
- **Comfort and Ergonomics**: It is possible to modify the characteristics of smart materials to improve overall comfort. This consists of attributes that are essential to sportswear, like flexibility, lightweight construction, and ergonomic design.
- **Resilience and Durability**: Some smart materials are made to be extremely resilient and durable, able to bear a lot of wear and tear. For sportswear, which is frequently subjected to intense use, this is vital.

Recommendation Example: Smart Tennis and Ski Apparel with Personalised Aesthetic Enhancements

Ellesse could take a bold step at the nexus of sports, fashion, and technology by branching out into smart skiing and tennis clothing with customisable aesthetic features.

Wearers would benefit from a personalised, dynamic and aesthetic product that combines personal design choices with functionality. This product would not only meets the needs of Ellesse's tech-savvy customers but also seamlessy connects athelisurewear with cutting-edge technologies to provide a unique sporting experience for the wearer. Figure 7 describes some key features and how they could be implemented.

Most customers desire unique and customised products and services. As digital natives, when Gen Z and Millenial consumers grow older, this preference will only become increasingly apparent. Ellesse could lose these important clients if they don't provide enough unique and personalised products/services. This could increase client lifetime value and loyalty; according to research, businesses who thrive in innovation and customisable products see an extra 10% - 15% boost in revenue as a result of their efforts (Forbes, 2022).

Key Features:	How?:
Customisable LED Light Strips: Incorporate customizable LED light strips into the material via a mobile application. To create a visually appealing and distinctive aesthetic, players can select colours, patterns, and even synchronise the lights with their movements.	Collaborate with tech firms that specialise in LED and smart textile technology. Customised LED solutions for wearables are the specialty of businesses such as Adafruit, Ellumiglow, and Lumen Couture. To ensure user ease, incorporate long-lasting or rechargeable batteries to power the LED lights. To guarantee the washability and longevity of the sportswear with LED integration, do extensive testing. Utilise beta testing to collect feedback from users and enhance the LED customization features according to user preferences. To achieve a visually appealing impact, carefully consider placing LEDs along seams, zippers, or strategically placed design components.
Biometric Sensors: Incorporating sensors into materials that monitor motion, body temperature, and heart rate. A smartphone app that receives this data can be used to give users real-time performance information.	Ellesse could consider partnering with top biometric sensor technology firms (like LifeQ or WHOOP, for instance) to integrate wearables and advanced biometric features into the sportswear. Biometric wearables are frequently placed on the wrist, chest, or can even be integrated into clothing for a seamless appearance.
Climate Adaption: Utilise smart materials that adapt to their surroundings. For instance, in response to temperature variations, the fabric may modify its insulating or breathability qualities, guaranteeing maximum comfort in a range of weather scenarios.	Include temperature-responsive intelligent materials, such as phase-change materials (PCMs) or thermoregulating textiles. Use coatings based on nanotechnology to offer UV protection without sacrificing breathability (NanoTech, 2023). Utilise highly durable, watrerproof, breathable and windproof fabrics, for example Gore-Tex which is made from expanded polytetrafluoroethylene (Winfields, 2022).

Figure 7: Key Features and Implementation Strategies Matrix (Authors own, 2023)

Considerations

Not all of the features described in Figure 7 have to be integrated into one clothing item, Ellesse could pick and choose different features based on what would be most appropriate and cost effective. Thorough technology and product testing will aid in the selection of appropriate smart materials to be used in their products.

Figure 8 displays the potential challeneged and benefits that utilising Smart Materials could have on Ellesse and their consumers.
The choice on whether to implement smart materials depends on how well the problems that have been identified in Figure 8 can be mitigated and how Ellesse can take advantage of the revolutionary potential of smart materials to establish itself as a leader in the changing sportswear market.



POTENTIAL BENEFITS

- **Enhanced Performance**: Smart materials can include performance enhancing qualities for consumers.
- **Personalised Comfort**: By supplying real-time data, wearables equipped with biometric sensors enable users to tailor their athletic wear experiences to suit their unique requirements and preferences.
- **Brand Differentiation**: By embracing technology, Ellesse can establish itself as a progressive and inventive company, drawing in tech-savvy customers looking for unique and contemporary sportswear.
- **Increased Market Share**: Smart features can make a brand more desirable to customers searching for sportswear that deviates from conventional fabrics and designs, hence increasing Ellesse's competitiveness.
- **Customer Engagement**: By providing engaging and customised experiences that go beyond the transaction, wearables can help businesses establish a stronger bond with their customers.
- **Integration of Health and Wellness:** Smart activewear appeals to customers that value fitness and lifestyle and is in line with the expanding trend of health and wellness.
- **Environmental Sustainability**: Ellesse's dedication to sustainability and minimising its environmental impact can be reinforced by the creation of smart materials that are eco-friendly.
- **Personalisation**: Using smart materials makes it possible to create sportswear that is both personalised and customizable, catering to a wide range of consumer preferences.

POTENTIAL THREATS/ WEAKNESSES

- **Cost**: The creation and use of smart materials could be costly, which could in turn raise production and retail prices.
- **Complexity of the Supply Chain**: Using tech-infused materials could complicate the supply chain (Appendix A), impacting schedules for manufacturing and potentially leading to delays.
- **Possibility of technical glitches**: If a component of an electronically integrated fabric breaks down, it can cause technical issues. Ultimately, this will make it difficult for the wearers to track potentially useful information (myAyan, 2022).
- **Data Privacy Concerns**: Consumer confidence may be impacted if smart materials require data gathering (biometric sensors, for example), as this raises questions about data security and privacy.
- **Educational Barriers**: Those who are not as tech-savvy may find it difficult to utilise and benefit from smart features like wearables since they lack the necessary expertise.

Figure 8: Pros and Cons of Integrating Smart Materials in Ellesse's Activewear (Authors own, 2023)

CONCLUSION

In conclusion, the fashion and sportswear industries are constantly evolving as a result of increased digitalisation and changing consumer preferences.

The main pain point for Ellesse that is hindering its performance and success as a brand is the lack of innovation in their products. Due to the brand's static approach to innovation in an industry characterised by quick changes and evolving consumer preferences Ellesse has been overshadowed by competitors such as Nike, Adidas and Puma who embrace innovation proactively. This has lead to diminished consumer engagement and awareness for Ellesse.

This highlights the importance of a strategic shift for Ellesse and the introduction of innovative products and services by utilising new technology in order to reclaim attention and market share. Ellesse can not only improve the performance and comfort of their sportswear by utilising smart materials, but also differentiate itself in a competitive market. According to Figure 8, while constraints such as cost and supply chain complications exist, the potential benefits, such as improved performance, brand differentiation, and increased consumer engagement, exceed these concerns.

Ellesse has the opportunity to position itself as an industry innovator by utilising smart materials to innovate their goods, appealing to a consumer base that values both performance and style. From here, they can continue to take the initiative to innovate other products and services and regain their position as a leader in the sportswear market.



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APPENDIX A: Value Chain Analysis for Ellesse

(Authors own, 2023)

Support Activities

Firm Infastructure
•Owned by Pentland Groups.
•Pentland has a Risk Committee that brings together stakeholders from key functional areas to improve the effectiveness of risk management in the business. They identify, monitor, and assess risk in order to raise awareness and accountability (Pentland, 2022).
•Ellesse's headquaters is located in London (Gov.UK, 2022).
•A global brand, its products are sold in various regions and through multiple retail stores.

Human Resource Management
•Pentland has mandatory online legal education courses to ensure that their brand's conduct themselves morally and responsibly. These consist of competition law, personal data protection, anti-bribery and corruption, and modern slavery (Pentland, 2022).
•Pentland aims to establish fair, uplifting, and welcoming workplaces that promote a happy and effective work environment (Pentland, 2022).
•They aim to incorporate inclusivity and diveristy into everything they do including their recruitment processes.

Technology
•Ellesse is available to buy on multiple e-commerce webistes and also has a social media presence, using apps such as Instagram, Tiktok, Facebook and Twitter.
•Ellesse was the first sportswear fashion brand to use an AI supermodel (Pentland, 2019).
•Utilises technology to create unique and innovative products and shopping experiences - for example their collaboration with Google in 2022 where a 'nameless sneaker' was made, consumers would have to find posters of the shoes and do an image search to find the shoe online (McQuarrie, 2022).

Procurement
•Ellesse is a member of the better cotton initiative and supports sustainable cotton farming (Ellesse, no date).
•Pentland monitors the social and environmental effects throughout their supply chains and implements changes that safeguard the welfare of local communities, factory workers, and the environment (Pentland, 2021).
•Pentland is transparent about who they source from; a list of their Tier 1&2 factories can be accessed through their webisite (Pentland, 2023) so that the factories are accountable for their standards and to ensure a constructive and open business relationship.

Inbound Logistics
•Pentland Brands orders products directly from their Tier 1 supplier factories.
•They mainly use overseas suppliers which are predominantly based in countires in Asia such as China and Bangladesh (Pentland, 2023). These countries often have lower labour and production costs, thus giving a higher profit margin to Ellesse.
•They recognise the importance of sourcing raw materials ethically.

Operations
•Pentland Brand's ethical materials policy must be followed when selecting materials. It is mandatory for suppliers to establish procedures that guarantee adherence (Pentland, 2021).
•They are working to achieve integrated packaging solutions that reduce the amount of plastic and increase the use of recycled materials in their packaging (Pentland, 2022).
•Trying to become more circular by reducing waste and re-using resources.

Outbound Logistics
•Multiple global distribution channels such as their own website, aswell as other online retailers such as Asos and Amazon. Although, they do not have their own physcial stores, but their products are sold in some popular physical retail stores such as Next and JD Sports.
•There are a variety of shipping options available on their website with the time and cost varying depending on location. For example, for orders in the UK, users can opt for either standard free shipping, next day delivery or click and collect next day delivery (Ellesse, 2023).

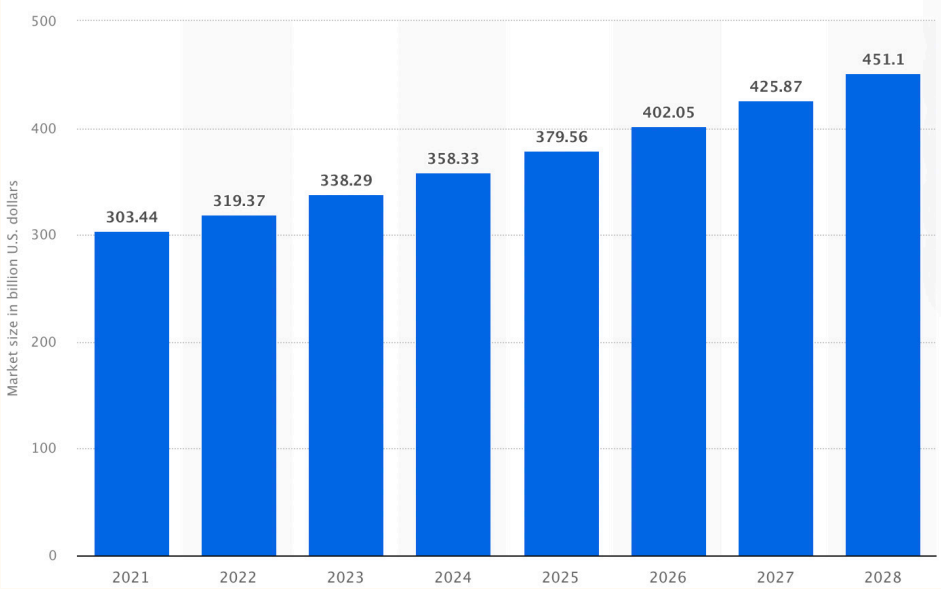
Marketing & Sales
•Interacts with their consumers on social media platforms such as Tiktok, Instagram etc. They often create 'Get Ready With Me' videos on tiktok which can attract new people to the brand as well as redirect people to their website and encourage viewers to buy their products.
•Collaborations with popular brands such as Michael Kors and Tomorrowland (Ellesse, 2022) which can increase their brand exposure.
•Post pictures of celebrities/influencers in their products on social media.
•Have sales and promotions such as 10% off your first order (Ellesse, 2023).

Services
•Offers free returns within 30 days of purchasing a product from them (Ellesse, 2023).
•They have a live chat available on their website (2023) for enquiries as well as a telephone number for queiries.
•Styling tips available on their Tiktok page.
•Currently hosting a competition with the Graduate Fashion Foundation (Ellesse, 2023).
•Has a 'News' section on their website which informs viewers of new collaborations and collections (Ellesse, 2023).
•They don't have any customisable products available.

Margin

Primary Activities

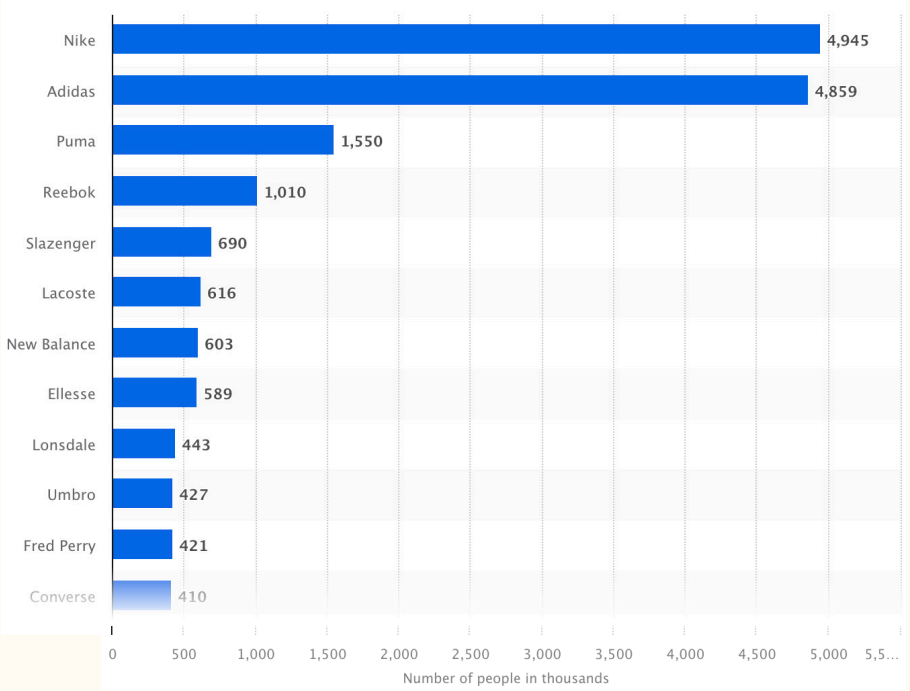
APPENDIX B



Size of the activewear market worldwide from 2021 to 2028 (Statista, 2023).

The global market size for activewear from 2021 to 2028 is depicted in this data. The size of the global market for sportswear was estimated to be 319.4 billion dollars in 2022. By 2028, it is predicted to increase to more than 450 billion USD (Statista, 2023).

APPENDIX C



Leading sports clothing brands in Great Britain 2021, by number of users (Statista, 2022).

This data displays Ellesse's position within the sportswear market, displaying that its main competiors are Nike, Adidas, Puma etc as they have a significantly higher amount of users compared to Ellesse (Statista, 2022).

APPENDIX D: Detailed SWOT Analysis for Ellesse

(Authors own, 2023)

STRENGTHS

- Ellesse's social responsibility can be seen through their charitable efforts, such as their product donations to Exist Loudly (Pentland, 2021). This enhances the brand's reputation and is consistent with modern notions of corporate social responsibility.
- By using natural dyes and recycled polyester in their collections, Ellesse shows a dedication to sustainability (Pentland, 2021). In addition to positioning the brand as environmentally conscious, this meets the growing demand for eco-friendly fashion options.
- Rich history and strong brand reputation, especially in the tennis and sportswear market, which has lead to increased brand awareness.
- Demonstrates a strong ability for establishing significant partnerships with prestigious companies such as Michael Kors and Tomorrowland (Ellesse, 2023). These collaborations help Ellesse maintain its reputation as a trendsetter in the fashion industry by enhancing the brand's prestige and creating opportunities for unique and popular product offerings.
- Combines the practicality of sportswear with stylish design, this not only accommodates a wide range of consumer preferences but also establishes the brand as adaptable and inclusive, able to satisfy the fashion demands of a large market group.

WEAKNESSES

- Social media marketing is underutilised, only around 0.43% of traffic to Ellesse's website originates from their social media (Similarweb, 2023).
- On Trustpilot.com (2023) Ellesse is overall rated 'bad' with many customers complaining about poor customer service and long delivery times.
- Negative brand perception - in recent years it has become associated with 'chav culture' and could be considered a forgotten brand.
- Limited innovations in designs; there is nothing on their website (Ellesse, 2023) to suggest that they are using technology to create innovative and unique products and services like their competitors (Figure 2). This can make it more difficult for Ellesse to keep up with the latest styles in fashion and cater to the changing needs of tech-savvy customers.
- Limited range of products compared to their competitors. In an industry with high levels of substitute products (Figure 3) this could therfore put them at a competitive disadvatange.
- Without flagship stores, the company may not be able to fully capitalise on the potential of experiential and immersive retail experiences and lacks a strong physical presence.

OPPORTUNITIES

- The growth in fitness-conscious consumer and the activewear market (Appendix B) provides opportunities for Ellesse to expand their consumer base and product offerings.
- Technological advancements can provide Ellesse with the opportunity to integrate new technology into their products and services and enhance the brand's competitivness.
- Ellesse can expand into emerging markets or regions that are experincing a growing demand for sportswear.
- Keep up to date with and capitalise off of new fashion and sports trends.
- If Ellesse enhance their online presence and invest more time and capitol into social media marketing they can attract more consumers to their brand. Strategic investments in these areas can boost brand awareness and increase customer engagement, adding to overall market growth and competitiveness. This opportunity corresponds to the expanding trend of digital engagement.
- Ellesse could open their own stores and capitalise off of immersive experiences.

THREATS

- Intense competition in the market (Figures 2 and 3) which can make it hard to differentiate and stand out in the market.
- As Ellesse has overseas suppliers (as discussed in Appendix A), they could potentially face disruptions and delays in their supply chain from factors like natural disasters, geopolitical tensions and changes in trading policies. Ellesse must be equipped to mitigate issues as such.
- Rapidly changing fashion trends mean that if Ellesse isn't able to keep up with changing consumer demands and trends they are at risk of becoming outdated.
- As showin in Figure 3, there is a high level of substitute products in the market and therfore bargaining power of buyers is also high, therefore Ellesse must consatlty find innovative ways to diffentiate in the market.
- The rate of inflation is gradually increasing, which is changing consumer purchaisng behaviours. According recent surveys, as the rising cost of living settles in, three quarters of consumers (72%) want to reduce their expenditure on non-essential items this year (Mutreja, 2022). Ellesse must use value propositions ,strategic pricing,, creative marketing techniques that highlight the long-lasting worth and excellence of Ellesse products to mitigate this.

APPENDIX E:

r/AskUK • 3 yr. ago
uniscolar2000

What are your thoughts on Ellesse the clothing brand?

I remember them being briefly popular a few years ago but I also remember way back that they were seen as a bit crap. They seem to be trying to make it a thing again but it doesn't seem to be catching on. Seems a bit chavvy to be honest but I've heard some people swear by them.

l0stlabyrinth • 3 yr. ago

About as prestigious as Gola but seems to be having a go at tapping into the nostalgia trend. Though seems to have been adopted into chav culture a bit, or at least that's who I see generally wearing it.

1 Reply Share ...

[deleted] • 3 yr. ago

Chavvy clothes from the 90s that have inexplicably come back in fashion.

1 Reply Share ...

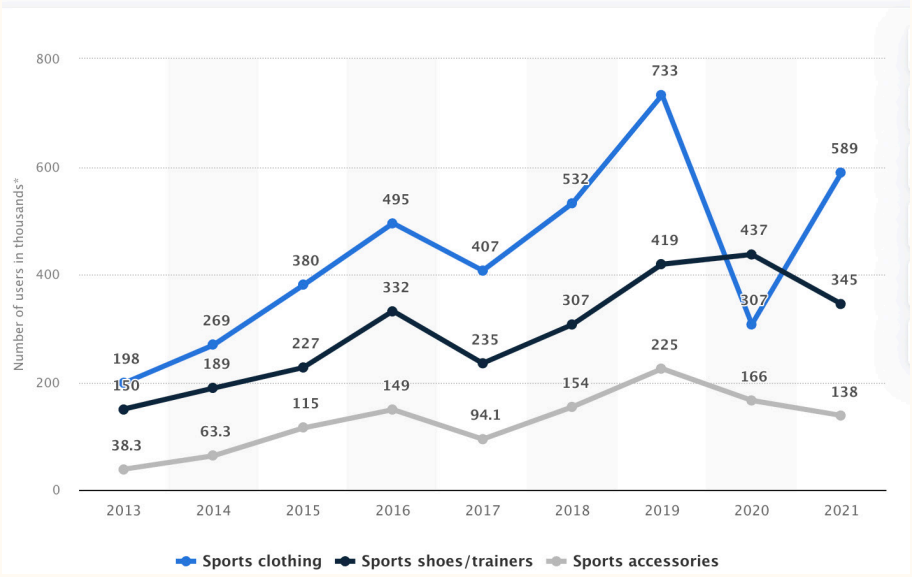
Liam1250 • 3 yr. ago

Should have stayed in the 1990s to be honest

2 Reply Share ...

(Reddit, 2020)

This data displays the negative perception of Ellesse, being associated with 'chav culture' on Reddit (2020). The data from Statista (2022) also displays an overall decrease in sales through out the years, suggesting the brand has decreased in popularity among consumers.



Ellesse products ranked by number of consumers in Great Britain from 2013 to 2021, by clothing product category (Statista, 2022)

APPENDIX F: Ellesse's Products



Key Benefits

- Fabric (3 Layer): Face - 56% polyester & 22 % polyester repreve, Middle - 100% TPU recycled, Back - 100% polyester recycled
- 3 layer fabric
- Taped-sealed seams on inside so jacket is not lined
- Pop over with zipper closure
- Adjustable hood and bottom hem (elastic in tunnel)
- cuff hem is adjustable wit velcro
- 3 zip pockets at front (2 at front and 1 hided underneath flap = kangeroo pocket)
- ellesse embroidered on chest flap
- Jacket is waterproof but not water repellent
- Extra detail here is the tape finishing
- Regular to loose fitted, straight body fit, normal length

Ellesse (2023)



Key Benefits

- 185GSM 80% Polyamide 20% Elastane
- TPU Badges

Ellesse (2023)

By looking at the product descriptions on Ellesse's website (2023), it is clear that there is a lack of innovation within their products. There is no mention of the use of technology or smart materials to innovate or benefit their products; some of their ski jackets are even described as not water repellent. With the high amount of substitutes and competiton available in the market, Ellesse needs to improve this in order to differentiate and create unique products for their consumers.