



Ella Ember

Competitive Landscape Report



Competitive Landscape Audit

Ella Ember is insightful, capable, graceful and a great listener. Currently, she's a woman in transition. After sending her youngest to college, for the first time in twenty years, she can spend some "me-time" with herself. She's realizing that although she loves full-family and friend get-togethers, she enjoys hosting **intimate gatherings** with couples from work, her book club, and neighbors and generally enjoying the "finer things." She's known for her **hospitality**, ingenuity, and **winsome spirit**--and she is loved by all. Next week Ella is hosting a fall celebration with a patio dinner under the twinkle lights and the harvest moon and has invited fifteen of her closest friends. Noting that it will be a crisp fall evening, she plans on wearing a new knit and sets out to find a **unique**, well-made piece...

Where would she shop?

Competitor Rating Scale

	J.CREW			
	Ryan Roche		a.a. antonio azzuolo	
	QUEENE AND BELLE			

Ranking Key	Weight	2	1	0
Online Store	5	E-Commerce	Website	None
Demographic	5	40-55yrs	Within 10 yrs.	Other
Price	4	\$200-\$450	Within \$100	Under \$100, over \$550
Aesthetic	3	Same	Similar	Dissimilar
Sustainability	2	Highlighted	No Highlight	None
Brand	3	Same	Similar	Dissimilar
Location	1	Midwest	US	Outside U.S
Fiber	1	Yes	Specialty Fibers	Common

Competitor Strength Analysis

Name	Demographic	Online Store	Aesthetic	Price	Location	Sustainability	Fiber	Brand	Total
Ohio Knitting Mills	0	2	0	0	2	1	0	0	13
Three Birds Nest	0	2	1	0	1	1	0	1	21
Anthropologie	2	2	1	2	1	0	1	1	40
J. Crew	2	2	1	2	1	0	1	1	38
Boden	2	2	2	2	0	0	1	2	48
Antonio Azzuolo	0	1	0	2	0	0	2	0	17
Charles Harbison	1	2	1	2	1	0	2	0	31
Caitlin Wiman	0	0	0	0	0	0	2	0	4
Rachel Comey	1	2	2	2	0	0	2	1	39
Timo Welland	0	2	0	2	0	0	2	0	22
Donna Kang	0	0	0	0	0	0	2	0	4
Peruvian Connection	2	2	2	2	0	0	2	1	44
Ryan Roche	1	2	2	0	0	0	1	0	23
Kim Haller	0	0	1	0	0	0	1	0	5
& Daughter	1	2	2	1	0	0	0	0	25
Queene & Belle	1	2	0	0	0	0	1	0	17
Esk	1	2	1	1	0	0	1	0	24
Coohem	0	1	2	0	0	0	1	0	13

Competitor Strength Analysis

#1 Anthropologie



#2 Boden

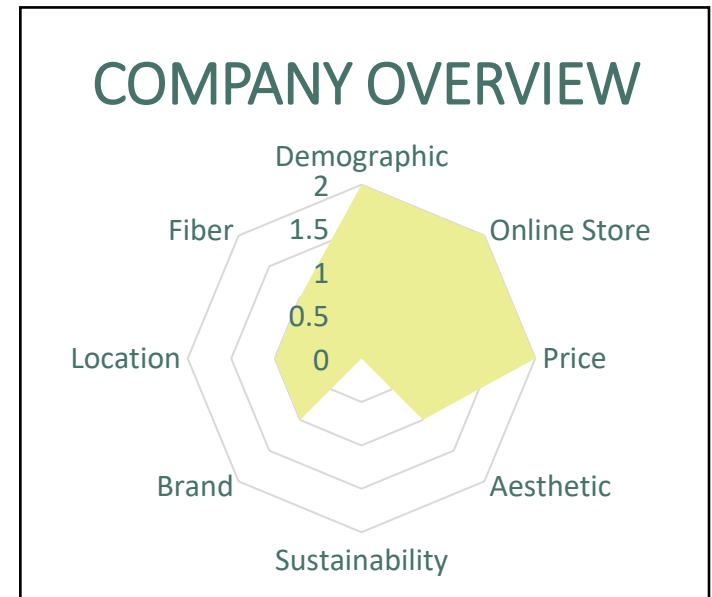


#3 Peruvian Connection



Anthropologie

Anthropologie is a **lifestyle brand that imparts a sense of beauty, optimism and discovery to our customer**. For her, Anthropologie is an escape from the everyday; it is a source of inspiration and delight, where innovative merchandising, customer centricity and a curated array of products come together to create an unimagined experience.

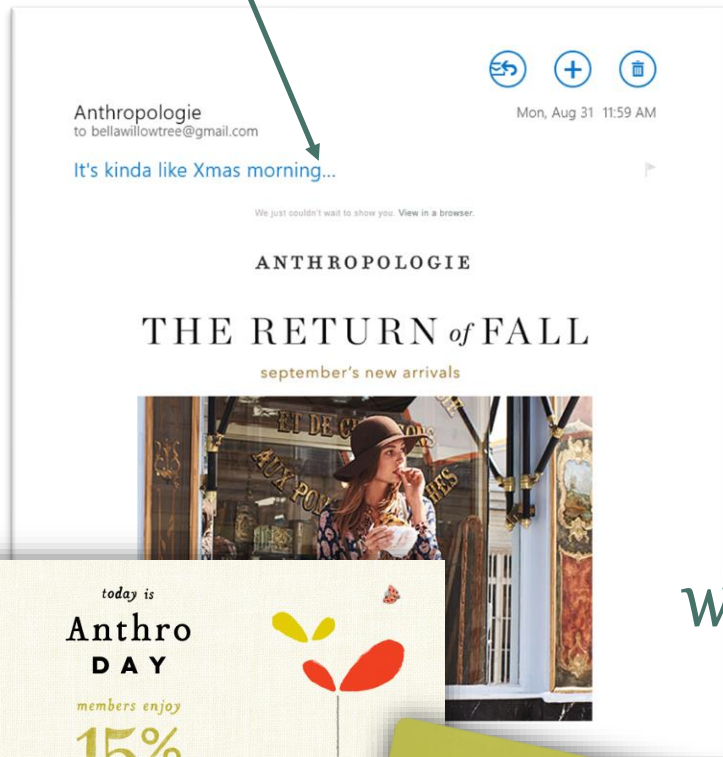


Anthropologie products are an expression of our customer's appreciation for **artfulness and good design**. To that end, our buyers and designers travel the world to uncover special products and to collaborate with talented artisans. Our assortment includes clothing, accessories, shoes, beauty, home furnishings, found objects, gifts and décor that exhibit influences ranging from vintage to global.

-- Urban Outfitters Inc.

Anthropologie Touch-Points

Heavy Email Marketing



Monthly Print Catalog



Window Displays



Anthro Card Promotions



Demographic Marketing Notes

“During the fourth quarter of fiscal 2014, *Anthropologie* registered 10% rise in retail comparable sales driven by its compelling product offerings and store shopping experience. The brand has improved its product mix and designs substantially over the last few quarters, which resulted in double-digit growth in its regular price comparable sales in Q4... Since *Anthropologie’s* updated theme of sensual and feminine looks has **found tremendous acceptance** among its customers, we believe the trend is likely to continue. To attract customers and enhance its appeal, the brand also **creates engaging story telling** techniques through its store windows, visual merchandising and display, along with catalog and email communications. This should assist the brand in driving store traffic going forward.”

-- Forbes, 2014

Food For Thought

ANTHROPOLOGIE: NO ADVERTIZING, NO PROBLEM

<https://cci13.wordpress.com/2013/12/16/anthropologie-no-advertising-no-problem/>

COMPANY PROFILE

<http://www.urbn.com/profile/anthropologie.html>

ANTHROPOLOGIE & AMP

<http://www.forbes.com/sites/greatspeculations/2014/03/12/anthropologie-free-people-propel-urban-outfitters-despite-a-slump-in-namesake-brand/>

FREE PEOPLE & ANTHROPOLOGIE: CONTENT MARKETING THAT CREATES A CONNECTION

<http://www.ciceron.com/2014/05/free-people-antropologie-content-creates-connection/>

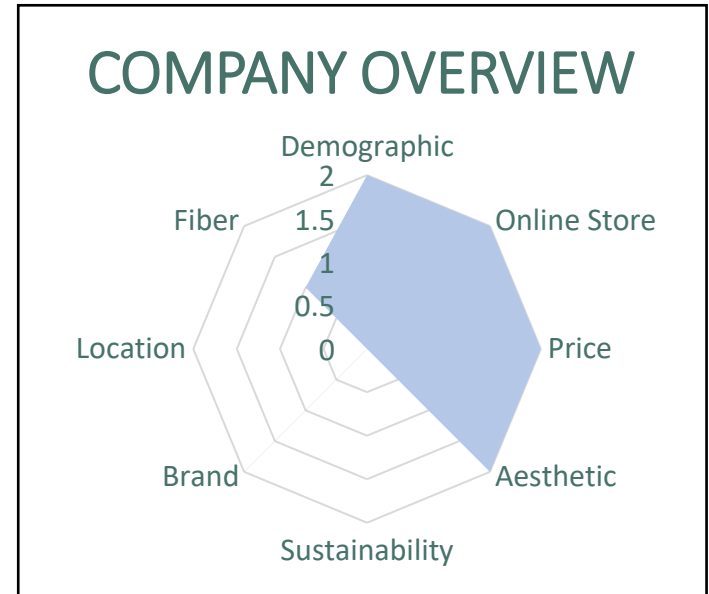
ANTHROPOLOGIE: BOUTIQUE RETAIL ON THE HIGH STREET

<http://www.businesswire.com/news/home/20110602006420/en/Research-Markets-Anthropologie-Boutique-Retail-High-Street#.VeePydLBzGc>

Boden

“Boden is not just a brand, but a lifestyle fantasy, denoting its wearers’ **aspirations and symbolizing their values...** [It is] distinguished from America’s own mid-market brands by **its quirkiness and eccentricity**, which you see in the prints and embellishments. There’s **nothing quite like it in the US market.**”

—Daily Mail UK



Boden Touch-Points

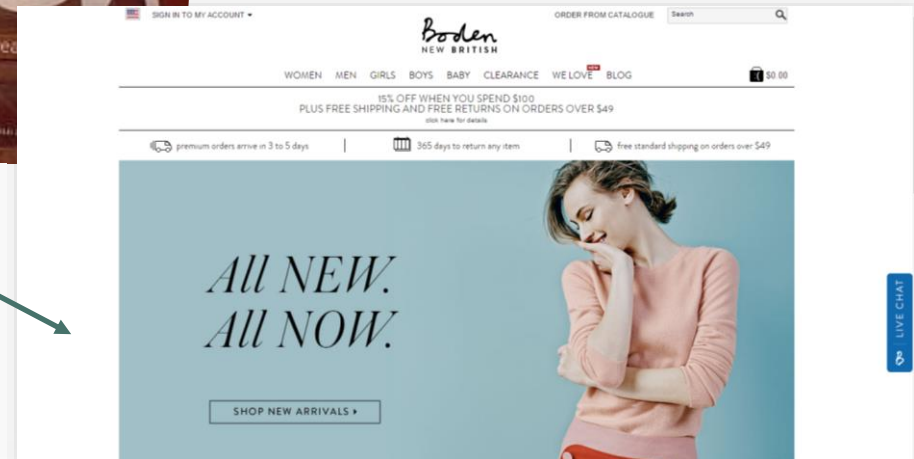
Seasonal Print Catalog



High Quality E-mail Marketing



USA E-Commerce (with Live Chat)



Promotions

Food For Thought

ABOUT BODEN

<http://www.bodenusa.com/en-US/help/about-us.html#>

SUCCESSFUL MARKETING: BODEN

<http://www.ampagency.com/case-studies/boden/>

CASE STUDY: BODEN

<http://www.experian.co.uk/assets/market-ing-services/case-studies/case-study-boden-cm.pdf>

BODEN USA

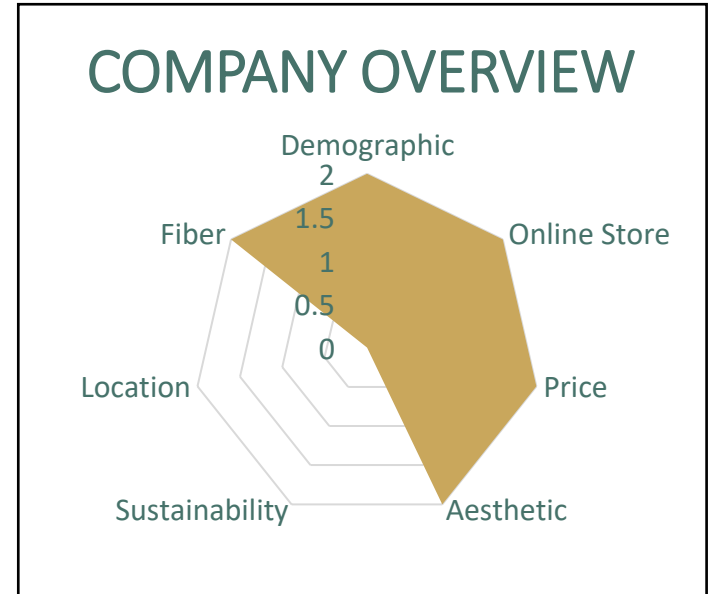
<http://www.dailymail.co.uk/femail/article-2119912/Boden-USA-The-label-fashion-fortune-selling-picture-perfect-British-lifestyle--founder-gambling-bigger-prize.html>

BODEN REVAMPS DATA STRATEGIES FOR CUSTOMER ACQUISITION

http://www.digitaltrainingacademy.com/casestudies/2013/07/case_study_boden_revamps_data_strategies_for_customer_acquisition_and_email_targeting.php

Peruvian Connection

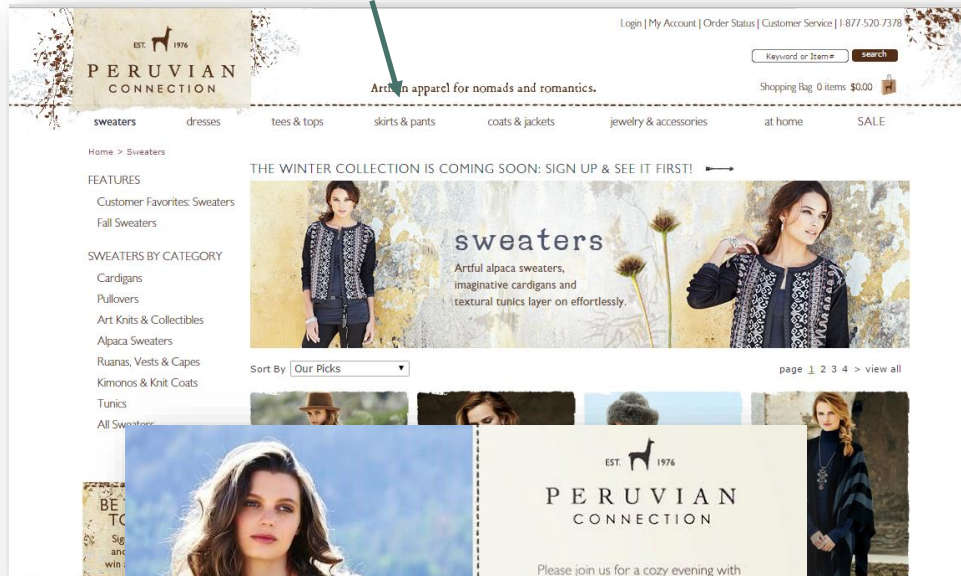
[Since their start] the original goal has remained the same: to offer **artisan made**, original designs in **native Andean luxury fibers**. Today, Peruvian Connection's collections are created by a group of extraordinarily talented designers. Each piece is a celebration of **ethnographic textiles** from around the world, made by skilled Andean artisans whose time-honored textile tradition remains an **art form**.



-Peruvian Connection Ltd.

Peruvian Connection Touch-Points

Personalized E-commerce Experience



Internationally Distributed Catalog



Dynamic E-mails and Ad Promotions



Peruvian Connection

“Peruvian Connection has started with **personalized recommendations** on product detail and shopping basket pages, moved on to e-mail product alerts, is getting ready to launch dynamic landing pages for search-driven traffic, and has plans for better merchandising transactional e-mail communications... The e-mail product alerts, which involve dynamic merchandising via templated weekly e-mails, **leverage customer profile and purchase history** to determine who gets contacted and which merchandise gets promoted—e.g., something left in the shopping basket, new products, recent markdowns, etc.”

--Hallie Mummert, Target Marketing

Food For Thought

HOW PERUVIAN CONNECTION BUILT AND INTERNATIONAL CATALOG BUSINESS

<http://www.mytotalretail.com/article/how-peruvian-connection-built-international-catalog-business-22838/2/>

CASE STUDY: PERUVIAN CONNECTION WEAVES A STRONGER PERSONALIZATION STRATEGY

<http://www.targetmarketingmag.com/article/case-study-peruvian-connection-weaves-stronger-personalization-strategy-405194/2/>

PERUVIAN CONNECTION LAUNCHES FOUR INTERNATIONAL E-COMMERCE SITES

<https://www.internetretailer.com/2006/10/10/peruvian-connection-launches-four-international-e-commerce-sites>

PERUVIAN CONNECTION TIES ANCIENT TRADITION TO MODERN FASHION

<http://www.thisiskc.com/2013/10/peruvian-connection-ties-ancient-tradition-modern-fashion/>

Competitive Landscape Audit

Product	Ella Ember			
Demographic	40-55	40-55	35-50	35-50
Aesthetic	Cozy Chic	Whimsical	Tailored Classic	Nature Made
Price	\$200-\$450	\$88-\$500	\$50-\$450	\$100-\$600
Location	Midwest	East Coast	UK	Peru
Fiber	Alpaca	Wool	Cashmere	Alpaca
Sustainability	Yes	No	Ethically Made	N/A

Competitive Landscape Audit

NOTE 1: Competitor models range in age from 30-45. This resonates well with consumers who want to look younger, and subconsciously are more attracted to clothing featured on slightly younger, but still age-appropriate models



NOTE 2: All competitors feature European models in unique settings. Whether you are targeting Asians, Blacks, Hispanics, Whites, etc., you need to pay close attention to catering to them when choosing models.



NOTE 3: Again, All competitors chose unique settings. You may want to highlight Bolivia (similar to what Anthropologie and Peruvian Connection have done), or even highlight the Midwest (similar to Boden's strategy).



Competitive Landscape Audit

After auditing all three competitors, several successful trends have become apparent. They are all using **e-mail marketing, print catalogs, and quality branding** to effectively market to their demographic. Looking at their sales (and strategies, found in “Food for Thought”), it is clear that **this style of marketing is working exceptionally well for them**--each reporting steady growth during the past several quarters. Additionally, Anthropologie has created a great customer following through **intriguing content creation**, Boden has splashed into the American market with great **brand differentiation** based on their “quirky English” style, and Peruvian Connection is capturing sales through **their personalized, dynamic e-commerce shopping experience**.

Consumer Segment Report



Consumer Segment Report

Professionals



17M

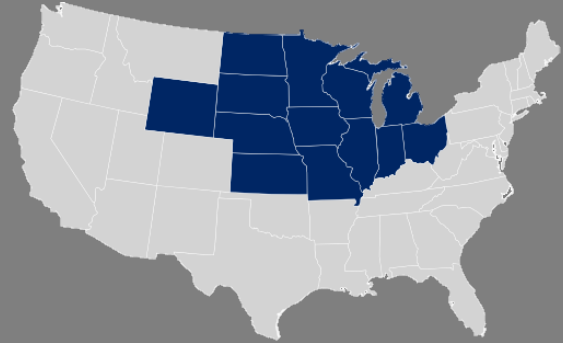
45-54 yr. olds spent on Knitwear



44M

In the last 12 months

THE MIDWEST



111 index for buying knitwear

Social Media Users



85%

Online Shoppers



57%

33 MILLION WOMEN
AGES 40-54 IN THE US

Over \$250 in Category (past 12mon.)

AGE AND GENDER

		Total '000	Proj '000	Pct Across	Pct Down	Index
Total		237,011	1,000	0.4	100	100
Women		122,870	944	0.8	94.4	182
Educ: graduated college plus		67,714	643	0.9	64.3	225
Educ: attended college	*	45,416	161	0.4	16.1	84
Educ: graduated high school	*	70,520	66	0.1	6.6	22
Educ: did not graduate HS	*	30,552	19	0.1	1.9	15
Educ: post graduate	*	24,233	287	1.2	28.6	280
Educ: no college	*	101,072	85	0.1	8.5	20
Age 18-24	*	30,221	56	0.2	5.6	44
Age 25-34	*	41,706	205	0.5	20.5	116
Age 35-44	*	40,126	180	0.4	18	106
Age 45-54	*	43,941	225	0.5	22.5	121
Age 55-64	*	38,390	184	0.5	18.4	113
Age 65+	*	42,626	151	0.4	15.1	84
Women 18-34	*	36,060	261	0.7	26	171
Women 18-49		67,433	553	0.8	55.3	194
Women 25-54		63,943	610	1	61	226

Over \$250 in Category (past 12mon.)

EDUCATION AND OCCUPATION

		Total '000	Proj '000	Pct Across	Pct Down	Index
Total		237,011	1,000	0.4	100	100
Educ: graduated college plus		67,714	643	0.9	64.3	225
Educ: attended college	*	45,416	161	0.4	16.1	84
Educ: graduated high school	*	70,520	66	0.1	6.6	22
Educ: did not graduate HS	*	30,552	19	0.1	1.9	15
Educ: post graduate	*	24,233	287	1.2	28.6	280
Educ: no college	*	101,072	85	0.1	8.5	20
Occupation: professional and related occupations	*	32,190	282	0.9	28.2	207
Occupation: management, business and financial operations	*	22,675	235	1	23.5	246
Occupation: sales and office occupations	*	32,545	110	0.3	11	80
Occupation: natural resources, construction and maintenance occup.	*	13,108	8	0.1	0.8	15
Occupation: other employed	*	41,958	64	0.2	6.4	36

Over \$250 in Category (past 12mon.)

HOUSEHOLD INCOME

	Total '000	Proj '000	Pct Across	Pct Down	Index
Total	237,011	1,000	0.4	100	100
HHI: \$150,000+	26,233	349	1.3	34.9	315
HHI: \$75,000-\$149,999	68,105	454	0.7	45.4	158
HHI: \$60,000-\$74,999	25,109	83	0.3	8.3	78
HHI: \$50,000-\$59,999	18,815	35	0.2	3.5	44
HHI: \$40,000-\$49,999	20,600	18	0.1	1.8	21
HHI: \$30,000-\$39,999	22,631	23	0.1	2.3	24
HHI: \$20,000-\$29,999	23,014	27	0.1	2.7	28

MARITAL STATUS AND FAMILY

Marital Status: Never Married	65,394	177	0.3	17.7	64
Marital Status: Now Married	126,438	643	0.5	64.3	121
Marital Status: Engaged	11,676	13	0.1	1.3	26
Marital Status: Widowed*/Divorced*/Separated (legally)	45,179	181	0.4	18.1	95
Child age: <12 months	10,067	16	0.2	1.6	39
Child age: 12-23 month	8,742	23	0.3	2.3	62
Child age: <2 years	17,979	40	0.2	4	52
Child age: <6 years	43,478	164	0.4	16.4	89
Child age: 2-5 years	33,480	135	0.4	13.5	95
Child age: 6-11 years	44,113	219	0.5	21.9	117
Child age: 12-17 years	46,089	139	0.3	13.9	71

Over \$250 in Category (past 12mon.)

GEOGRAPHICAL LOCATION

	Total '000	Proj '000	Pct Across	Pct Down	Index
Total	237,011	1,000	0.4	100	100
Census Region: North East	43,097	201	0.5	20.1	110
Census Region: South	88,799	302	0.3	30.1	80
Census Region: Midwest	51,209	239	0.5	23.9	111
Census Region: West	53,905	259	0.5	25.9	114

YEARS AT ADDRESS AND HOME VALUE

Years At Present Address: <1 year	40,216	135	0.3	13.5	80
Years At Present Address: 1-4 Years	64,787	214	0.3	21.3	78
Years At Present Address: 5+ Years	132,008	652	0.5	65.1	117
Home: Owned	156,236	764	0.5	76.4	116
Home value: <\$50,000	9,250	11	0.1	1.1	28
Home value: \$50,000-\$99,999	19,654	13	0.1	1.3	16
Home value: \$100,000-\$199,999	51,716	188	0.4	18.8	86
Home value: \$200,000-\$499,999	60,264	339	0.6	33.9	133
Home value: \$500,000+	15,352	213	1.4	21.3	328

Over \$250 in Category (past 12mon.)

RACE/ETHNICITY

	Total '000	Proj '000	Pct Across	Pct Down	Index
Total	237,011	1,000	0.4	100	100
White	178,734	811	0.5	81.1	107
Black/African American	29,411	53	0.2	5.3	42
American Indian or Alaska Native	2,858	0	0	0	0
Asian	6,958	66	1	6.6	225
Other	23,339	71	0.3	7.1	72
White only	175,782	811	0.5	81.1	109
Black/African American only	28,166	53	0.2	5.3	44
Other race/Multiple classifications	33,063	137	0.4	13.7	98

Over \$250 in Category (past 12mon.)

CABLE TREND HIGHLIGHTS

	Total '000	Proj '000	Pct Across	Pct Down	Index
Total	237,011	1,000	0.4	100	100
Watched any pay-per-view/last 12 months	31,468	222	0.7	22.2	167
Watched any Video-on-Demand/last 12 months	58,744	452	0.8	45.2	182
BBC America	17,325	129	0.7	12.9	177
Bravo	32,814	176	0.5	17.6	127
#Disney Junior	10,568	63	0.6	6.3	141
DIY (Do It Yourself Network)	17,705	116	0.7	11.6	155
E! (Entertainment Television)	27,625	177	0.6	17.7	151
HGTV (Home & Garden Television)	47,950	360	0.8	36	178
LMN (Lifetime Movie Network)	20,599	143	0.7	14.3	165
OWN (Oprah Winfrey Network)	20,263	161	0.8	16.1	189

Over \$250 in Category (past 12mon.)

Magazine Readership Highlights

Allure	6,476	56	0.9	5.6	205
American Way	1,550	17	1.1	1.7	262
Architectural Digest	4,415	109	2.5	10.9	586
The Atlantic	1,813	18	1	1.8	241
Bon Appetit	6,593	104	1.6	10.4	374
Cooking Light	11,009	95	0.9	9.5	204
Elle	5,795	96	1.7	9.6	392
Elle Decor	2,257	34	1.5	3.4	353
Glamour	12,161	162	1.3	16.2	315
Harper's Bazaar	3,843	84	2.2	8.4	516
House Beautiful	6,363	64	1	6.4	237
In Style	9,553	140	1.5	14	347
In Touch	6,169	60	1	6	230
Inc.	1,153	13	1.1	1.3	262
Life & Style Weekly	4,615	44	1	4.4	227
Los Angeles Times (Sunday)	1,643	33	2	3.3	472
Lucky	2,388	59	2.5	5.9	581
Macworld	1,269	16	1.3	1.6	300
Marie Claire	4,208	119	2.8	11.9	669
More	1,638	26	1.6	2.6	370
OK!	5,026	67	1.3	6.7	317
Real Simple	8,253	169	2	16.9	485
Self	5,282	89	1.7	8.9	400
Shape	5,783	130	2.3	13	534
Us Weekly	13,661	178	1.3	17.8	308
Vanity Fair	6,843	107	1.6	10.7	371
Veranda	1,513	27	1.8	2.7	426
W	1,248	30	2.4	3	564
Washington Post (Sunday)	1,590	48	3	4.8	710

References

MEDIAMARK REPORTER

MediaMark review on consumer spending for knitwear over \$250, 2014

U.S. CENSUS BEUREAU

U.S. Employment Tables, 2010

U.S. Women's Earning Tables, 2010

<http://www.census.gov/>

BEYOND THE PINK

<http://www.slideshare.net/jackmortonWW/jack-mortonwpbeyondpink>

BUREAU OF LABOR STATISTICS

Women's Earning Tables, 2012

The Older Population, 2012

<http://www.bls.gov/>