

## REPORTS

# The Tenniscore Stories That Retailers Should Serve

From Zendaya's influence to brands such as Lacoste and Brooks Brothers gaining traction, the world of sport and luxury is influencing the mass market once again. We dive into what's driving Tenniscore, using EDITED Market to reveal data trends across key categories, while suggesting fresh ways to position the story in emails and social media.



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on April 26th, the actress has been spotted in various buzzy, tennis-inspired ensembles, including a white Louis Vuitton jacket at Indian Wells and Loewe on the red carpet. Fans are emulating her iconic style.

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Stories within emails should combine preppy knitwear, jewelry such as tennis bracelets, sunglasses and neutral palettes for an Old Money aesthetic, or push sporty tanks and ultra mini skirts for a Y2K update.

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The spotlight will shine even brighter on tennis this summer ahead of Wimbledon and the Summer Olympics in Paris – both in July. Reframe relevant stock and trends already in your assortment to feed into strong storytelling around the sports x luxury crossover.

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The death of the dress is contributing to a rise in skirt silhouettes, particularly skorts, of which first majority sell outs were +55% YoY in Q1. Classic white styles and pleated minis are also on the rise and play into a variety of subculture stories.

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Men's polos should already be a staple item in Spring 2024 assortments. With the average selling price +14% and +10% in the US and UK, respectively, shoppers are proving they aren't afraid to purchase products at a premium. Uncover similar pricing trends at your competitors using EDITED's Architecture tool linked below.

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Retro-inspired sneakers achieved cult status in 2023. Looking at tennis sneakers in stock in the first quarter, retailers reduced discounted stock by 10pp YoY from 51% of the total to 41% in 2024. Furthermore, sell out rates increased from 31% to 35%.

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## What's Driving Play?

for the film's global premieres, donning tennis-inspired ensembles from Louis Vuitton and Loewe. EDITED identified Club Sports in October 2023 as a major theme from the SS24 runway.



### **Wimbledon and the Paris Olympics**

A summer of sports lies ahead and will continue to drive demand for the aesthetic. Wimbledon takes place from July 1st to 14th, and the Olympics in Paris follows shortly after on July 26th. Coco Gauff was the first US tennis player to clinch an Olympic spot.



## The Netflix Effect

Following in the footsteps of *Drive To Survive*, the docuseries *Break Point* turned several players into household names. Though Netflix recently announced the decision to end production after two seasons, it announced a new project, *Alcaraz, the Docuseries*, that will follow tennis prodigy Carlos Alcaraz.



## **The Empire of Tennis Influencers**

With thousands of followers on Instagram, partners of top men's tennis stars, including Morgan Riddle (253k), Paige Lorenze (582k) and Ayan Broomfield (59k), are building social media empires of their own and frequently documenting life courtside. They're partnering with active brands including Year of Ours and Wilson on brand deals and collaborations.



## Storytelling Guide

### Old Money Goes Courtside

Tap into the crossover of Quiet Luxury and sport with the aspirational aesthetic inspired by country club members with a touch of 90s. Gen Z is particularly fascinated with the look, with many born at the end of, or after, the decade. Style preppy knits tied over the shoulder, complete with accessories from tennis bracelets to handbags and sunglasses.

#### Build the story:

White tennis dresses • trimmed V-neck knits • pleated skirts • white caps • neutral palettes • linen trousers • collared shirting • belted dresses • tennis bracelets

Solutions

Products

Customers

Resources

Company



SHOP SPRING

ASOS Email UK – Mar 4, 2024



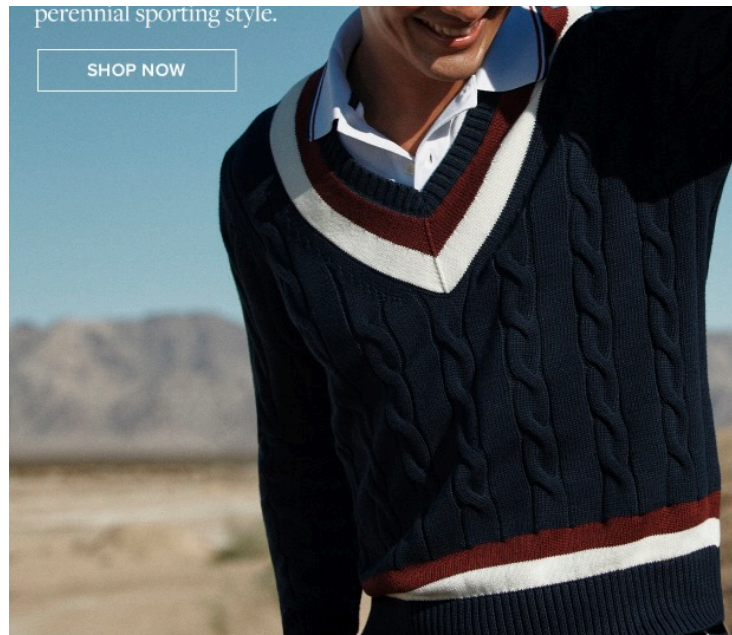
Our best-selling Carbon38 exclusive is back in stock and with a new update. Discover the *Tennis Dress* now in beige and back in ivory.

[SHOP NOW](#)



Carbon38 Email US – Nov 4, 2023





### *the* Heritage V-Neck

A perfect style serve that's  
as relevant today as it was  
100 years ago.

[SHOP NOW](#)



Brooks Brothers Email US – Mar 26, 2024

## Serving Retro Y2K

Demand for aughts style has trickled into tennis – think Anna Kournikova as your style inspiration. Characterized by thick jersey headbands, ultra low-rise mini skirts, tank tops and court sneakers. Color palettes in varsity shades of red, royal blue and yellow, feature best in this look.

### Build the story:

Graphic tees • crew necks • low-rise mini skirts • varsity colors • headbands

are an easy win.

[Shop Now](#)

*Reformation Active*

*Original Retro Brand*

*The Upside*

*Original Retro Brand*

*On*

Shopbop Email US – Mar 29, 2024





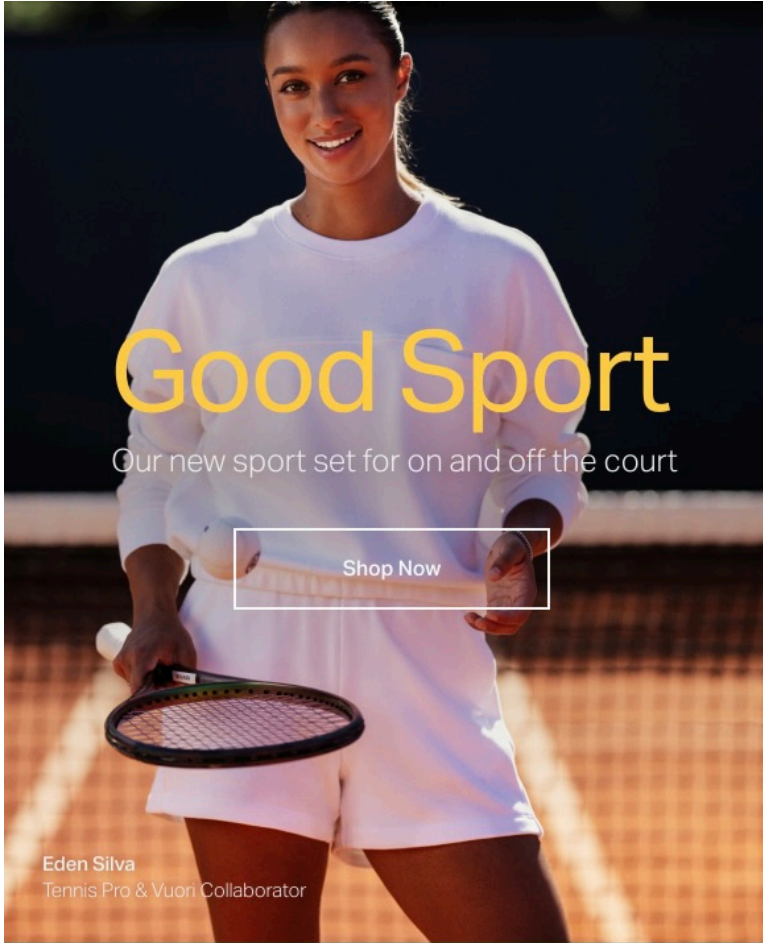
[SHOP THE EASY TIGER SHORT](#)



Free People Email US – Nov 22, 2023

### **Match Point**

While Tenniscore can also be aspirational, don't ignore its performance aspect. Court sports, such as pickleball in the US and padel in Europe, are growing at unprecedented rates, elevating the importance of technology within apparel. Activewear shapes, including bike shorts, tech polos, tanks and performance sneakers, are central within messages and should support customers on the court.



**Good Sport**  
Our new sport set for on and off the court

[Shop Now](#)

Eden Silva  
Tennis Pro & Vuori Collaborator

Soft, sueded and designed with versatility in mind, the Sedona Sport Crew and Sedona Sport Short will effortlessly take you from the court to the clubhouse.

**Sedona Sport Crew**  
Our new cozy pullover features retro-inspired

[Solutions](#)

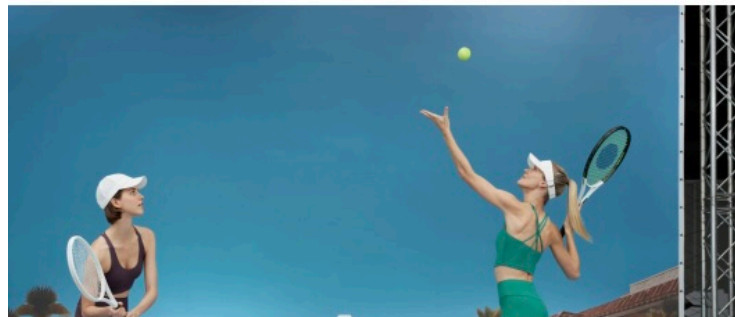
[Products](#)

[Customers](#)

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[Company](#)





Oysho Email UK – Dec 19, 2023

## Ladylike

The obsession with the Girlhood aesthetic is driving ultra-femme trends in the world of tennis – think Tenniscore meets Balletcore. From accessories to dresses, bows have proven to boost average prices and drive demand. Incorporate these details into already-successful styles for an easy refresh.

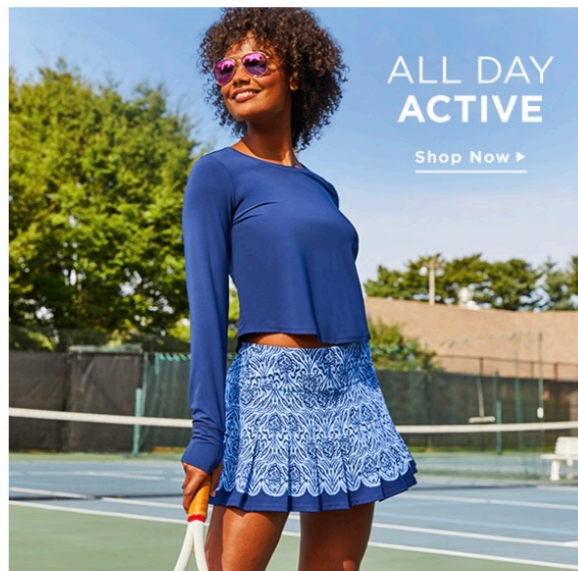
### Must-have trends:

Ruffled skirts • ruched zip-ups • floral prints • purples & pinks • bow dresses • tweed • pleated skirts • lace-trim socks • corset tops • white loafers



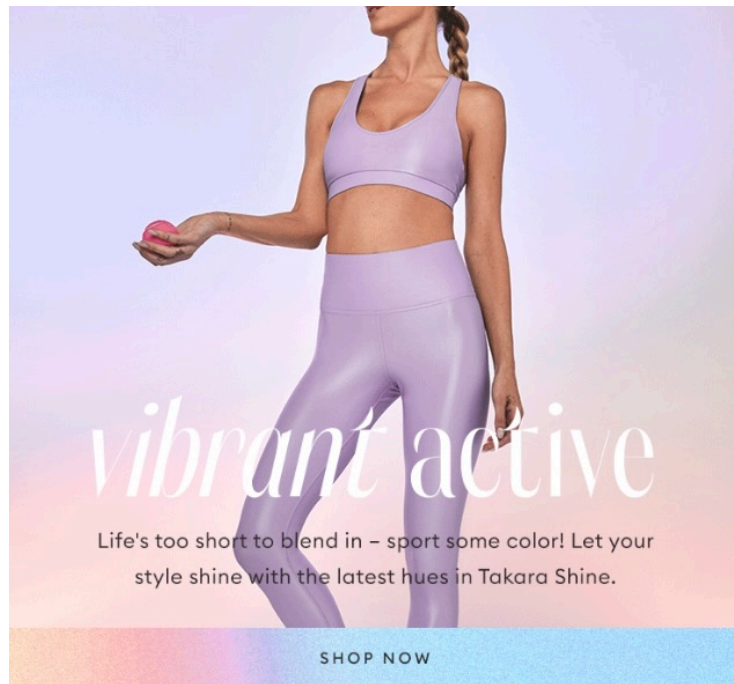
versatile style for beyond the courts.

[Shop Now](#)



Lilly Pulitzer Email US – Jan 23, 2024



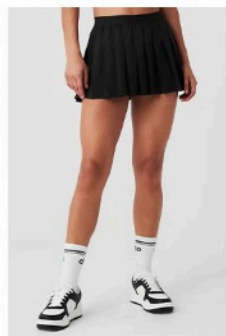


Carbon38 Email US – Mar 28, 2024



SAVE 50%

Airbrush Winter  
Warm Puffer Pant



SAVE 40%

Varsity  
Tennis Skirt



SAVE 40%

Aces Tennis Skirt

Alo Email US – Dec 29, 2023

## Tennis Skirts and Skorts

Shoppers are gravitating toward skirts and skorts over dresses in 2024. In Q1, first majority sell outs for dresses declined 4% YoY, opening the door for skirt and skort sales to increase 7% YoY. With the rumored death of the dress, Tenniscore is the perfect testing ground to gauge your consumers' appetites for sporty skirts. The shape is also extremely versatile – take note of Free People's Hannah skort below, which teeters between tennis and Corpcore aesthetics.

\*Hover over the chart for additional data

## What Sold in Q1?

*Products experiencing a first majority sell out Jan 1 – Mar 31, 2024*

### Skorts +55% YoY



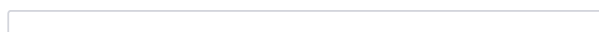
#### Stretch mini skort

Grey\_802

Pull&Bear at Pull&Bear (UK)

GBP 19.99

### Whites +54% YoY





### Tennis Premium Skirt

White / black

adidas Performance at Adidas (UK)

GBP 65.00

## Pleats +36% YoY



### Hannah Skort

Chambray

NIA at Free People (US)

USD 68.00

## Men' s Polo Shirts

A critical hero item in Tenniscore assortments, sustained demand is driving an increase in the average price for a men's polo shirt stocked at both high street and activewear retailers. The average full price for a polo in stock in Q1 grew 14% YoY in the US and 10% YoY in the UK, with in stock levels in both regions also up double digits. Deeper investment in knitted styles and premium fabrics such as cashmere is driving up the

## Men's Polos Average Price by Retailer

In stock Jan 1 – Mar 31, 2023 vs. 2024

	US			UK		
	A&F	H&M	Nike	adidas	Mango	Zara
Entry	\$35.00	\$12.99	\$42.00	£25.00	£22.99	£17.99
YoY%	0%	0%	0%	14%	0%	13%
Average	\$32.82	\$32.82	\$72.70	£50.65	£38.27	£35.63
YoY%	16%	16%	7%	5%	13%	3%
Exit	\$100.00	\$81.99	\$110.00	£129.99	£139.99	£89.99
YoY%	11%	9%	0%	0%	133%	-40%

## What Sold in Q1?

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## Navies +160% YoY



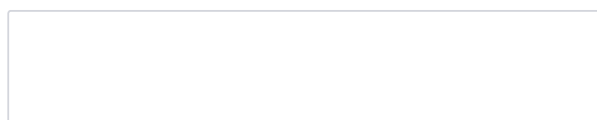
### Paulos Polo

Navy blazer

Jack & Jones at Jacamo (UK)

GBP 32.00

## Knitted +67% YoY





### Short sleeve open-knit polo shirt

Ochre\_707

Pull&Bear at Pull&Bear (UK)

GBP 29.99

## Zip polos +79% YoY



### QUARTER-ZIP POLO SWEATSHIRT WITH ...

Ecru

Zara at Zara (UK)

GBP 35.99

## Sneakers

The explosion of the adidas Samba in 2023 is evidence of a retro sport-inspired silhouette clawing its way back into the mainstream. Several throwback models are making a return and are more hyped than ever. Nike and Social Status dropped a collaboration on March 8th starring the Nike Attack tennis sneaker, and last year KITH partnered with adidas on an update to its iconic Rod Lavers. Data is backing up the resurgence of tennis silhouettes, with majority sell out rates climbing from 31% in Q1 2023 to 35% in Q1 2024.

demand.

### **Tennis Sneaker Sell Through Rates**

In stock and first maj. sell out Jan 1 – Mar 31,  
2024 vs. 2023

\*Hover over the charts for additional data

### **Tennis Sneaker Discount Rates**

In stock Apr 1, 2024 and new in Jan 1 – Mar  
31, 2024 vs. 2023

1 – Mar 31, 2024

**Retro +70%**



**Retro trainers**

Pull&Bear at Pull&Bear (UK)

GBP 35.99

**Chunky +90%**



**Chunky Sneakers**

White\_001

H&M at H&M (US)

USD 54.99

**Green +19%**

