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Sporting Goods Brands and Retail Store Dramatization

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Introduction

The context of in-store shopping has recently been subject to special attention from sporting goods brands’ managers who are looking at changing the environment and atmosphere of their stores in order to encourage consumer shopping behaviors. Despite all the advertising investment made to reach the greatest possible numbers of consumers, just over 50 percent of product purchases are decided in retail outlets in most western countries. Similarly, it appears that about 58 percent of purchases in supermarkets are not planned in advance and about 12 percent of products originally provided on shopping lists don’t have pre-defined brands. If one adds the percentage of substitution purchases (about 6 percent), the rate of purchase decisions made within a store is about 70 percent to 80 percent (e.g. 70 percent in the USA and 76 percent in France). Such factors as sensory elements, interior design and in-store advertising favor impulsive purchases, change the types of consumer visits, and influence the volume of purchases as well as improving brand loyalty.

Several trends in the research on the store atmosphere (e.g. Baker, 1998; Barrey, Cochoy and Dubuisson-Queillier, 2000; Chebat and Michon, 2003; Donovan and Rossiter, 1982; Michon, Chebat and Turley, 2005) have perfectly highlighted the importance of the functions involved in the development of products to consumers (e.g. packagers, designers, merchandisers), whether it concerns the luxury industry or the hard discount trade. The retail store dramatization is definitely becoming a new trend affecting the forms of shopping as traditional retailing is fiercely challenged by e-commerce. To properly present their products and brands, sporting goods makers tend to prefer developing their own network of thematic stores such as skiing or surfing brands, or developing sales through the internet, as well as staging regular flash promotional sales.

The evolution of commercial spaces that is taking place should also be understood in regards to the changes of functions and status of brands in our societies. Whereas they were originally used to identify and distinguish goods, brands have become symbolic engines which have the function of staging and scripting the universe of goods. This shift of paradigm about the functions of brands is due to various factors including the retail stores’ changes of role and physical places. These retail stores have become cultural spectacles displaying places of lifestyles and myths (Goss, 1993). It is therefore logical that retail spaces have been
transformed, by a mirror effect, into places of dramatization and expression for brands. This is shown in the West Edmonton Mall in Canada, which is organized in an extraordinary and grandiose manner with numerous thematic stores such as Quiksilver and Lacoste (Andrieu, Badot and Macé, 2004). Commercial places such as entertainment malls and airport or railway station stores invite consumers to different types of visit (e.g. weekend, evening, with family, for fun shopping) and then to purchase less-needed and more spontaneous products and brands.

Behind the retail stores' dramatization that is needed to increase the value of products, sporting goods brands have an obligation to differentiate themselves from the competition. Specifically, sporting goods brands (i.e. manufacturers and retailers) must establish and maintain an intimate relationship with consumers to enable them to appropriate the products and places where they are sold, even if it means altering their original uses or meanings. This trend is leading to an increasing blurring of the distinction between private and commercial space. Therefore, major retailers try to artificially recreate special atmospheres likely to set up close relationships with the consumer, giving the impression that “here is like home.” One of the first brands to have explored this concept is Ralph Lauren in the USA in the late 1960s with its shops comprising parts identified by a color, an odor, a musical background, recreating the consumer's home. However, what is in question is the purpose of these new store concepts, whose primary function is no longer only transactional, but serves also to provide a multi-sensory spectacle. By transforming the retail spaces in this way, marketers are using what brands refer to as “places of spectacles”, “consumption temples” and “cathedrals of consumption” (Firat and Venkatesh, 1995; Ritzer, 1999).

With the development of TV shopping and online shopping consumers should logically go less and less often into retail stores. However, beyond advertising, it appears that a lot of purchases are influenced by the in-store environment. This also applies to those consumers who use shopping lists and those who purchase following their affect and emotions. To this end, aisles and shelves were widened in many supermarkets to encourage consumers to stroll in front of goods with higher profit margins. Conversely, the opposite phenomenon is observed in discount stores: the low-margin items or items in competition with retailers’ own brands are piled up in narrower aisles. The differences of aisles and shelf settings are then better understood, as in the case of Decathlon (Oxylane Group), which favors its own sport brands by displaying them at eye level to its consumers, or Intersport, which places value sport brands in specific corners or areas.

If the models of Kotler (1973) and Mehrabian and Russell (1974) take into account internal variables, affective and cognitive, for Bitner (1992) the actions to enhance the store atmosphere have an impact not only on consumer behaviors but also on their emotions and cognitions. The effects of atmosphere on consumers’ physical behaviors, their purchases and intentions result in attraction or avoidance behaviors towards the point of sale. In other words, the store atmosphere influences the way people interact with the layout of the retail space. Bellizzi, Crowley and Hasty (1983) showed that consumers were more attracted by warm colors than soft colors. Rieunier and Dauqué (2002) presented a research synthesis on the influence of each factor linked to atmosphere on consumers’ behavior. For instance, Sibiril (1994) and Yalch and Spangenberg (1993) observed in a clothing store that consumers spent more and made unexpected purchases when they liked the music played.

Consumers were also found to buy more and spend more with classical music than popular music (Ben Dahmane Mouelhi and Touzani, 2003). However, some results also showed that too much sensorial stimulation hinders consumer focus which is unfavorable to purchase
(Rieunier, 2002). Studies (e.g. Bloch, Ridgway and Nelson, 1991; Falk and Campbell, 1997; Kowinski, 1985) seem to converge in considering that the time spent shopping by western consumers comes in third position after their working and domestic activities. Therefore, managers have been increasingly trying to manipulate one or more store internal variables to increase this time and make it more profitable. Attracting new consumers in retail stores also represents a significant objective of such strategies.

The different forms and evolutionary landmarks which have characterized chain store brands since the late 1990s will be presented first. Historically, the brands’ differentiation factors within a competitive market mainly relied on classical variables such as price, benefits, quality, types and broadness of range of products, and location, but the intangible dimensions of the service offers were progressively integrated, mainly using consumer imagination and the symbolic and experiential components of consumption (Filser, 2002; Holbrook and Hirschman, 1982). Then, it appears important to understand how the dramatization of sport stores can be implemented and what kind of variables or themes can be used. This discussion first focuses on both structural and architectural aspects and then highlights the innovative aspects of the flagship stores and other concept stores in the current context of sporting goods markets.

The evolution of the sport brands’ distribution in a hypercompetitive market

The development of retail spaces has evolved considerably over the past twenty years, hence it is necessary for sport brands to determine their scope of actions to optimize the marketing of entry (i.e. attracting more consumers), the marketing of transformation (e.g. changing visitors into buyers) and the marketing of consumer loyalty.

The transformations of retail sales

The distribution sector is marked by a series of transformations which have forced companies to engage in major reformulations of their strategies: the emergence of world groups, the increased influence of retailers on sales channels, and the emergence of new forms of sales (Filser, 2002). Under pressure from international sport brands which gradually develop downstream strategies of integration, both specialized and generalist distributions of sporting goods have diversified since the late 1980s. This dynamic is not specific to the sport and leisure market, but is part of an evolution of all the distribution forms, of retailer–consumer relationships, and consequently of the modes of sales spaces management. The store chains are not only the place of encounter between the consumer and the products, but have also become objects of attraction, retention and consumer loyalty. The distribution sector is now characterized by a wide variety of formats: cash and carry, variety stores, franchises, hard-discount, supermarkets, hypermarkets, grocers, traditional stores, department stores, specialist department stores and factory outlets (Filser, Des Garets and Paché, 2001). The current number of retail forms involves the emergence of a heterogeneous range of sale areas, each with its own specific method of management. Some innovative concepts of stores have appeared all over the world. Most of the time, they present original layouts (i.e. interior or external) like the Art Deco surf shop of the brand Ron Jon in Cocoa Beach (Florida), as well as new commercial positioning like the surf shop concept of Quiksilver dedicated to the board-riding culture in Anglet (France).

Apart from the forms of distribution which have the ability to control the performances of each category of products, the store merchandising is often treated in a totally different way...
as it is more than the addition of the merchandising of all the product categories. For this reason, more and more generalist and clothing store chains are opening spaces and shops dedicated to international sporting goods brands. We can also observe the creation of specific sport universes and areas in already established stores and the development of their own sport brands by retail store chains such as Walmart with its brand Starter, developed in collaboration with Nike. In this new commercial environment, international sport brands are now forced to deal simultaneously with the specialized and generalist distribution channels. Indeed, mass-market retailing remains the principal vector of sales, even if all models of the same brand cannot be displayed; it determines pricing policies and is becoming more and more a direct competitor because of the development of the store brands. To compete with the store chains on their own ground, international sporting goods brands have chosen to develop their own networks of stores in order to better defend their products and also to make their consumers live various brand experiences (e.g. Dorotennis, Oxbow and Columbia). Others reinforce their distribution network, such as Billabong which in 2008 acquired one of its partners in the United States, the chain Quiet Flight based on the east coast and including 13 points of sale.

The development of the design and layout and the valorization of traditional retailing are due to the increasing competition to attract new consumers who are subject to multiple stimulations from retailing environments. For instance, some shopping malls have become huge leisure parks or entertainment centers, where it is now common to find merry-go-rounds, playgrounds or mini golf courses, such as in Sawgrass Mills in Fort Lauderdale in the USA or in the West Edmonton Mall in Canada. The development of outlets and malls is strongly related to the consumers’ desire to be distracted and entertained, which leads stores to imagine thematic environments which make them dream (Ritzer, 1999). These new thematic environments promote all kinds of sensory stimulations which are supposed to have direct effects on the size of the consumer shopping basket in both the medium and long term. In shopping for fun, which considers the frequenting of a store as a regular cultural activity, the design of commercial centers must have the function to re-enchant the shopping experience that was perceived as boring and repetitive. Among all the major criteria to take into account in building a sales area, elements such as the location, the shop fronts and windows, and the suitability of the products, as well as the competence and the friendliness of its shop assistants appear important (El Aouni, 2006). As for manufacturer brands, these elements shape the consumers’ images of a store and store chains. Depending on consumer tastes and shopping motives, it is easy to determine if a shop or store is adopted or avoided. This is illustrated, for example, by sport store chains such as Made in Sport and Sport Leader (two European chains) which are very popular among young people whereas they are avoided by adults and seniors. Similarly, we can understand why the small specialized downtown or corner shops such as cycles, racquet sports or jogging stores are frequented the most by adults and seniors rather than young people.

The sale space’s management depends on the physical and technical features of the point of sale (e.g. surface, profit margins, product ranges, price and turnover), on the specific stores’ role in relation to consumer behavior (e.g. convenience, comparison and decision stores), and on the characteristics of each family or category of products (Filser et al., 2001). However, its purpose remains to satisfy two basic functions which are the logistic function – to make sure that the consumer has access to the product – and the commercial function – to facilitate the transactional exchange. A third important function should now be added: the recreational or entertainment function which makes sure the store represents a source of hedonic gratification (Babin, Darden and Griffin, 1994).
Brands and retail store dramatization

Valuing stores for competitive advantage

However, this evolution of the retail environment does not solely explain the cases of store valorization implemented by international sporting good brands, and the development of their own network of stores and store chains. The observable changes in sporting goods distribution are also explained by an increasingly fierce competition they are facing from store chains. According to its location and its abilities, a consumer wishing to buy a sporting good has the opportunity to go to many different places, physically or virtually. Basically, the role of a point of sale has changed and the stores have become participating agents of sport brands communication (Kozinets et al., 2002). It now has a direct influence on consumer behavior. This explains why the specialized store chains in the distribution of sporting goods have developed more and more positioning and image strategies aimed at creating a strong distinction from their competitors. In this context, the management methods of the points of sale appear at the intersection of two components: the functional component related to the commercial relation on one hand, and the sensory and entertainment component which transforms the need to buy in a visit and a relaxing moment on the other hand.

Regarding the recreational and entertainment function, the implementation of a store dramatization is often the basis of a point of sale’s identity. Firat and Venkatesh (1995) used the terms “Disneyfication” and “thematisation” to describe the intense development of the discursive spaces which are the shopping malls. However, as this dramatization accelerates the ageing process of these stores, the frequency of renewal of these themes, layouts and design has also been accelerated (Daucé, 2000). The trend towards the dramatization of sporting goods’ specialized sale spaces is founded on a will to enhance the products and the stores with an obvious aim to influence consumer choices, frequency of visit, purchase and loyalty (Bouchet and El Aouni, 2004). Several studies have attempted to model this trend by either focusing on a specific dimension (e.g. Chebat and Michon, 2003; Rémy, 2002; Trottier, 2000) or synthesizing the basis of a dramatized offer (El Aouni, 2006). From these studies, we can identify two distinct strategies in the market of sporting goods. In both cases, we are dealing with a form of sale space “re-enchantment” which aims to create a particular atmosphere which in turn can positively influence consumer behavior.

The first strategy follows in its design and its operation the strategies implemented by recreation and leisure parks, whereas the second one relies on the play and hedonic component (Holbrook and Hirschman, 1982; Holt, 1995) to enhance the store’s attractiveness. That was the original purpose of the concept store “Village La Forme,” invented by the store chain Decathlon during the 1990s and implemented in several French cities. This concept-store relies on the gathering within the same area (i.e. the village) of a Decathlon store, several leisure products’ partner stores, several commercial sport participation providers (e.g. fitness, diving and golf) and outdoor activities areas. Decathlon has, however, progressively abandoned this concept store, which was not cost-effective because of the important costs of labor and maintenance of the playground areas. Since then, this store chain has changed its strategy. In its store in Mulhouse (France) for example, Decathlon contributed to the construction of a water ski facility adjacent to the store to offer a sport activity to the inhabitants of the region. Now managed by a commercial partner, this sport facility enhances the store chain image, makes profitable the costs of maintenance and operation, and increases the consumer traffic near its point of sale.

In a socio–economic competitive and globalized context, specialized store chains as international sport brands are involved in the optimization process of supplier costs, transport and storage costs and human resources costs, as well as other costs which impact their strategies.
The comparison between different types of store chains such as Citadium (France) and Starter (USA), for example, shows a significant profitability difference in relation to the floor surface. Ultimately, the profitability targets and the store design and layout are heavily dependent on the field of activity and participate in the differentiation of sporting goods brands’ strategic positioning. These strategies often rely on the control of the front-side elements (e.g. decor and staff) in a commercial context as well as non-commercial context (e.g. certification and label), such as the shop “Mountain Equipment Co-op” (MEC) built in 2003, in Montreal (Canada). This ecological building uses geothermal energy and is 65 percent more efficient than a traditional store of a comparable size. In the field of eco-design, the Timberland brand is also at the forefront with the openings of stores using recycled furniture and wood panels and in which some shoes are made of ecological constituents. In these examples, these store elements do not directly aim to influence in-store consumer behavior but participate in the creation of a strong environmentally friendly image for the brands.

Although many marketing experts and researchers agree that the new stores aim to produce an “internal differentiation” through a better staging of goods and services, special attention is also given to the creation of pleasant shopping environments and atmospheres likely to be associated with store chains. This is the case with Quiksilver’s Boardriders Clubs, relying on the concepts of “into-store shops” such as Quiksvilles and Roxyvilles (for women), which allow the brand to implement its marketing methods and strengthen its identity by providing advertising into the sale space of its independent distributors. The construction of a new retail space no longer relies on simple intuition and results from in-depth exchanges with the sector’s practitioners. Beyond the main sensory components, the relational and transactional in-store elements positively influence the consumers’ affective, cognitive and physiological reactions. Despite this shift in the distribution of sporting goods, it should not be forgotten that consumers do not have access to the same type of shops because of their geographical location and it would be naive to believe that outlets are homogeneous around the world. Similarly, not all consumers are subject, in their daily lives or during their holidays, to the same influences from sport brands’ strategies. For example, it is possible to observe an important difference between sporting goods retailers in North America and in Europe. For instance, the French leader of sport store chains, the Oxylane Group, was unable to export its selling format to North America although it has been successful in many European countries, Russia and China.

North American sporting goods distribution is structured differently because of the sport leagues and franchises system (e.g. NHL, NBA, MLB and NFL), meaning that all merchandised products (e.g. jerseys, shorts, caps) are sold at the same prices within independent stores and store chains. Another specificity is perhaps the presence of manufacturer brands’ stores; a trend that is now increasingly noticeable in Europe. Finally, three groups dominate sporting goods distribution and have a huge diversity of store chains spread throughout the continent (and beyond): the Forzani Group, the Foot Locker Group Inc. and Sport Authority. The Foot Locker Group Inc. had, in 2005, nearly 4,000 stores (Foot Locker, 1428; Footaction, 349; Lady Foot Locker, 567; Kids Foot Locker, 346; Foot Locker International, 707; Champs Sport, 570). The Forzani Group has a variety of specific stores (nearly 400 franchises in 2006) as SportChek, SportMart Coats Mountain Sport, Sport Experts, National Sport, Econosport, Nevada Bob’s Golf, RnR, Atmosphere, Gen-X, North American Intersport (the only similarity with Europe). The Sport Authority group is one of the largest American retailers, with nearly 400 stores in its name. Unlike most sport store chains, one of its features is to have many own brands: Alpine Design (clothing and accessories for outdoor sport), Aspire (women’s sportwear), Golf Day (golf accessories), Tour Collection (clothing and golf
Brands and retail store dramatization

accessories), Estero (hardware and accessories for football), Parkside (trampolines and outdoor games) and Bodyfit by Sport Authority (fitness accessories).

In Europe, and in France in particular, the sporting goods market is represented by 75 percent specialists (47 percent are integrated, 24 percent are associated, and 4 percent are single-brand and independent) and 25 percent non-specialists. As an example, the cycles market accounts for nearly 16 percent of the total sales of sporting goods in France. Within this specific sector, 66 percent of the share is due to specialized (e.g. Bouticycle, Culture Bike, Mondovélo and Véloland) and multisport (e.g. Oxylane Group, Intersport, GO Sport and Sport 2000) sport store chains. The rest of the share is split between independents (22.2 percent) and generalist megastores (11.8 percent). Another particular aspect, in the world of specialized and generalist sport store chains in France, is the development of brands owned by large store chains, but whose name is different. For instance Decathlon, which is present across Europe, distributes its own brands such as Tribord (water sport), Quechua (outdoor and hiking activities), B’Twin cycle (cycling) and Kipsta (team sport). All products bearing the names of these brands are exclusively sold in Decathlon’s stores.

After having presented the differences in terms of retail store functions and the specificities of distribution networks, the next section focuses on the architectural dimensions of the sport store chains.

The diversity of sport store chains’ architectural styles

In response to the saturation of the specialized distribution market, we can observe a trend towards the improvement of existing sale spaces, their renovations and their reinvention. In an intense competitive sector, one’s success produces others’ failures, and lacks of perceived image or quality are quickly punished. In this context, the mixing of architectural styles responds to a need for fashion and lifestyle associated with a search for aesthetic references. Prinz (2005) identifies ten architectural styles of stores which can be applied to the sporting goods market. However, many of these styles can be used simultaneously by store chains according to their points of reference and to the main role of the sales space.

The traditional style

This type of development is the expression of an era and integrates into a patrimonial logic. Stores are designed as urban markers and faces of the streets. Their architecture and their decor are then a testimony of the past. They are frequented by an accustomed clientele which has its guides and its brands. A comparative study of sporting goods stores in the area of Dijon (France) has shown that “traditional stores” have managed their sale space very heterogeneously but the majority of them considered it a secondary marketing option (Bouchet, 2005). This trend seems to be mainly due to the specificity of the products, often targeting segments with relatively specific and seasonal needs. Several formats of layout can characterize these stores based on the products sold (e.g. running shoes, sport equipments and apparel), the status of the store chains (i.e. independent or franchised retailers) and on the store itself.

The new baroque style

In a world that has lost its mysteries, the new baroque is a ritual and relational expression (Prinz, 2005). This style has been retrieved from the architecture of eighteenth-century baroque art by contemporary architects and designers. However, some retailers have stopped
using this style because it is too much attached to fashion or without any notable developments. This style is motivated by the search for new symbolic objects and new commercial shapes. The clientele of this type of point of sale look for emotions and exotic and aesthetic landmarks. As for sporting goods brands, Puma installed in 2010 in New York a shipping container sport store with an interior converted into a soccer shop and with a soccer pitch nearby. This red container gave Puma a new baroque, urban, port or traveler identity.

**The rational style**

Based on a marketing and merchandising approach linked to a rational, functional, ergonomic and efficient presentation of the products, this style is the result of a process of standardization, normalization and efficiency, and relies more on the valorization of the products than the décor and the settings. In this type of store, the organization, the number of references and their hierarchy are more important than the general atmosphere. The loyal consumers who frequent these stores often find inside their roots, culture and myths. As examples, we can cite chains such as Hema in Amsterdam, Gap, Levis’ Store or Dockers in the USA. In the French market, the sporting goods stores chain Au Vieux Campeur fits into this architectural style that focuses on products for consumers who are generally experts in mountain sport.

**The classical style**

This kind of store can be classical either by the use of classical codes and styles from a past period or by the use of a contemporary style. With the classical style, quality, comfort and design are predominant with a meticulous choice of materials, lighting and furniture. This is the world of good taste and chic. A few examples illustrate perfectly this style of stores: Hermès, Chanel, Dior, Lanvin and Louis Vuitton. The consumers of these store chains are deemed to be difficult and demanding. In the sporting goods market, some brands have used this style in some of their stores, such as Ralph Lauren with locations in the most prestigious places like Madison Avenue in New York, Bond Street in London and La Madeleine in Paris. Ralph Lauren is a very American brand that has its roots in old Europe. For aristocratic and social elites, choosing the brand is choosing classical and immutable values. Nowadays, Ralph Lauren, in particular in the sportswear market, is radically opposed in terms of values to brands such as Gotcha, another sportswear brand (Hetzel, 2002).

**The thematic style**

The thematic style is inspired by the great success of store chains such as The Nature Company. This style brings together several types of products around a theme or a value. With this thematic style, the store is closer to a “ready to live” philosophy that generates an atmosphere, an imaginary and a lifestyle. The consumers of these outlets are very flexible, changeable, always looking for novelty and innovation, unexpected and exotic. In the sporting goods market, many store chains have adopted this architectural style partly because of their outdoor positioning. It offers a multitude of opportunities for interior designs with a “natural” touch. International brands positioned in mountain sport like Patagonia, in surfing sport like Rip Curl and in rugby with Canterbury or Ruckfield are trying to capitalize on this trend in their own distribution network.
Brands and retail store dramatization

The show style

The show or spectacle style used by some megastores is very close to the dramatization used in theatrical or cinema productions. They evoke worlds and atmospheres where the decor is of considerable importance and provides a strong scenic dimension. Consumers are primarily young, changing, moving, ephemeral; people who compare and travel a lot. As examples, we can cite stores like Original Levi’s in London, Morgan Puett or Virgin in New York, Caesar’s World Retail in Las Vegas and Nike Town in Europe and the USA. The Adidas Originals store opened in 2006 in the Champs-Elysées (Paris), with its space dedicated to customized shoes, is also a very good example of the show style. Another emblem of the show style is the shop Citadium (a contraction of city and stadium), a concept invented in 2000 in Paris, which mixes sport and fashion embedded in urban cultures such as skateboarding and hip-hop practices.

The fun shopping style

The fun shopping style, also called “retailtainment,” which is a term used to describe retail marketing as entertainment (Ritzer, 1999), is a trend that is already well known in the USA. As examples, large stores can offer nutrition advice and patisserie lessons, installations by artists, radio broadcasts, or food and wine tastings. In these places, everything is done to pleasantly surprise consumers. These stores are primarily places to live experiences and to stroll. They are places where people meet and where the emotional dimension is predominant over the purchase. In the sporting goods market, we can cite the case of store chains that have chosen to open huge areas dedicated to sport practices, such as the megastore Globetrotter (7,000 square meters) in Cologne (Germany). This is a point of sale where consumers can test a kayak in a large indoor swimming pool and compare scuba diving equipment at four meters deep. Three brands (Columbia, Jack Wolfskin and The North Face) are gathered in an area of 1,000 square meters and 20,000 articles are devoted to outdoor products on four floors.

The trendy style

With this style, shops are impregnated with a fashion spirit. They are unique stores which innovate and which make people talk about them through the fame and the personality of their creators (i.e. stylists or designers). These stores reveal new needs and they make people dream. Consumers of these places are experts and fashion connoisseurs. The store chain Abercrombie and Fitch is a very good example of this trendy style. The musical background is carefully chosen and allows the store chain to highlight certain lifestyles and community and self-fulfillment values as elements to seduce consumers. In the sport market, this type of trendy shop is a booming trend because of store brands such as Puma, Converse and Champion.

The minimalist style

This trend of stores was launched in the 1980s by the Japanese and magnified by top fashion designers Calvin Klein, Jil Sander, Prada and Armani. In this store style, austerity, sobriety and purity of architectural lines are the key words. Only a small selection of products is presented but they are very well valorized. A clean, sober and elegant atmosphere emerges from this type of store. Their consumers are seen as sophisticated, demanding, and at the
forefront of fashion design. On the sporting goods market, the minimalist style is reflected, in some way, in the stores of brands located in the premium or ultra-premium segment such as Lacoste. This minimalist style can also concern stores that offer the products of professional sport clubs such as the Manchester United and Barcelona FC stores.

**The nomadic style**

This style is one of the latest trends in commercial architecture. These are mainly mobile shops which move from town to town and can be found in a mall, in a public place or in a small pedestrian alley. In this type of point of sale, consumers stop by or pass through them. In the sporting goods market, this type of concept is generally not a special layout adopted by specialized brands. However, many of them can be found during time-bound sporting events such as the Olympic Games and FIFA World Cups. For example, a Rugby Park was installed in the Paris subway (Auber station) during the 2007 Rugby World Cup and then visited by more than 250,000 potential consumers per day. These nomadic points of sale can also be found in other places such as open markets, sport stadia and major tourist attractions. Products can come from official channels but counterfeit or illegal products can often also be found in these temporary stalls.

**Flagship stores and other concept stores**

In the marketing literature dealing with goods distribution, a few researchers (e.g. Sherry, 1998; Filser, 2003) have analyzed the new forms (i.e. flagship and concept) of store layouts and the tendency to “dramatize” the points of sale, designed to enhance competitive differentiation. These new stores have also become the emblems of specialized store chains and international brands that have chosen to develop their own shops. The pioneering aspect of flagship stores in sporting goods consumption is presented below and followed by a discussion on the future of the concept stores in the sporting goods sector beyond the ten architectural styles previously identified.

Flagship stores are the showcases of international brands or some store chains (Kozinets et al., 2002). Through their exceptional or unique character, their purpose is to communicate and display the image that brands and store chains want to project to their targeted audiences. Two orientations are identified in the design of a flagship store brand: the re-enchantment through extraordinary experiences (Ritzer, 1999) and the re-enchantment of everyday life (Cova and Cova, 2001). These two forms of re-enchantment aim to create a unique atmosphere much more attractive than the prices or the products offered. Ultimately, flagship stores have to display two specific characteristics: first, they have to show uniqueness and exceptionality to feed consumer imagination; second, they have to bear a dimension of rationality and utilitarianism to create massive flows of consumers to be transformed in their purchase of products.

They can be developed by the brands themselves or by retailers (Filser, 2001). In the first case, selling products is not imperative as the place is primarily to help in the construction of the brand image, spirit and promise, such as in the Nike Town store for Nike. We are here very close to the finality of this concept in the role of brands museums. In the second case, the flagship stores must illustrate the positioning of the store chains and help them in their external communication. The positioning role of flagship stores is based on the values promoted by the firm, its personality, its philosophy, its culture and its products. Ultimately, the flagship store restores a direct relationship with consumers (Filser, 2001). It also allows the
Brands and retail store dramatization

staff to interact with the consumers in a less transactional manner, but also the consumers to interact with each other to create a brand community (McAlexander, Schouten and Koenig, 2002). In the sporting goods market, new flagship store concepts have been developed by store chains which favor more and more the relational dimension of the point of sale, such as the Quiksilver flagship store “three in one” which also involves the brands Andaska and Café Ono.

According to Prinz (2005), there are eight keys to the creation of a concept store in a specialized distribution sector:

- strategic positioning and marketing;
- communication;
- selected products;
- a good location;
- a space big enough to express oneself, to stroll, to manipulate, to appropriate;
- competent staff;
- efficient merchandising;
- innovating, identifiable and memorizable decor.

For this author, the new concept stores should also be oriented towards the following elements: time management, education, support, comfort, tolerance, citizenship, health, well-being, safety and recreation. Even if they do not adopt a flagship store strategy, there is a need for store chains to renew and improve their sales space: more clarity and comfort, bigger spaces, new products, increasing valorization of the products and communication change. As recent examples in the sportswear market, we can cite Onitsuka Tiger, which blends the arts and traditions of authentic Japan with seductive urban design styles, and Adidas, which opened a new concept-store “SLVR” (pronounced “silver”), in the Marais district (Paris) deemed to be a generator of trends, to confirm the company’s foray into the world of fashion with an offer of clothes in a trendy and minimalist architectural style.

In a globalized and competitive environment, many store chains, such as Walmart in the USA and Costco in Canada, are now engaged in a dynamic to reduce and optimize their suppliers, transport, storage, and staff management costs. However, the question is no longer one of trying to make the maximum number of products available to the consumers in tightly organized spaces, but rather to develop the product valorization using a store dramatization claiming that it is cheaper (Badot, 2005). There is nowadays a growing success of hard discount which dramatizes the stores in creating a simulation of factory and warehouse. The particular arrangement of products (e.g. bulk pallets, surplus of cardboard boxes, in a dimly lit room) and their positioning now seem to produce among consumers a perception of functionality and a “cheap prices” story. Walmart stores appear as the archetype of minimalist and popular points of sale (Badot, 2005). From this trend is born the Starter brand, a collaboration between Nike and Wal-Mart. Even if it is worthy of note, this specific dramatization strategy in the sporting goods market does not seem to record a real success probably because consumers mainly frequent specialized sport stores and because they perceive sporting goods as high-value products.

Conclusion: the influence of in-store shopping contexts on consumers

The physical and social environments of consumers significantly influence their product choices, uses and evaluations. However, the general atmosphere of a point of sale also produces
favorable and unfavorable consumer behaviors. In some cases, the presence of other consumers may even constitute a key element of a store chain offer. For example, a small and less frequented sport shop can have a deterrent effect but a dense crowd could also have the same effect on frequeration in a big shopping mall. Impacts are not the same with consumers in a hurry or with low mobility, with young consumers looking for “retailtainment” or with consumers looking for social interactions. For all these reasons, store chains must now integrate multiple settings to optimize their sales and satisfy their consumers, who experience shopping as a constraint or an amusement, a pleasure or an anxiety, an excitement or a nightmare.

To remain competitive, the sporting goods brands are now sold via all distribution channels. In particular, online sales of international sporting good brands are increasingly popular, particularly when they are sold at the cheapest prices in destocking operations. These marketing operations generate tremendous enthusiasm among consumers, which seems to significantly reduce shopping constraints such as time and travelling costs. However, this does not appear to fully apply to clothing, footwear and sport equipment as consumers seem to develop mixed strategies which combine trying the products in stores before ordering them online.

To compete with e-commerce, many store chains have tried to increase the time consumers spend in stores. The sporting goods brands have then focused on more diverse and sophisticated shopping motivations, beyond the simple utilitarian dimension of the product. They have created worlds and environments where consumers primarily go to live a social experience, share common interests, enjoy a pleasant moment, find a good deal or a rare and original model. Studies on the shop atmosphere and its influence on consumers have aroused growing interest from managers of store chains (Michon, Chebat and Turley, 2005). In the sporting goods market, the objective of some of them is to create an atmosphere that can favorably modify the attitudes and behaviors of consumers. Building a specific ambiance is achieved by manipulating specific visual, olfactory, tactile, auditory and social variables around the products. Thanks to stores’ architecture and layout, this atmosphere is a vector of additional positioning and differentiation.

It should be remembered that sporting goods brands have objective characteristics, including sensory ones, based on which consumers can make comparison (Bouchet and Hillairet, 2008, 2009). In stores, the impacts of sensory emissions on consumers are highly topical because they are thought to play an important role in the consumer evaluation, selection and buying processes, and sporting goods brands hope that the transformation of the store environment will increase purchases and simultaneously improve consumer loyalty. More empirical results are, however, needed to legitimate such assumptions.

Among all sporting good brands that have created or used a new concept store, it is indeed not easy to identify those which have really enhanced their sales figures and have really innovated and explored some promising tracks. A concomitant question is whether the evolution of in-store dramatization will also be accompanied by a transformation in the relationships between consumers and their sporting goods and retail brands.

Notes
3 In French, la forme refers simultaneously to body fitness and shape.
Brands and retail store dramatization

References


