

100%

The global retail agency

Meet your next running shoe.

Winning Strategies:

The playbook for 'Authenticity' in global sports apparel.



Why is the sports apparel sector at the forefront of retail experience innovation?

What insights can other industries gain from this?

In 2020, we unveiled our report, 'Sporting Goods: Who's Leading the Store Experience Race?' which spotlighted trailblazing in-store experiences among brands in this category.

Fast forward to today the sports apparel category continues to set the pace, adopting a strategy we've termed authenticity. Our latest report delves into the essence of authenticity, showcasing how global brands are implementing this approach in their stores, leading the way in transforming the retail landscape.



Fashion, Fitness, and Fidelity:

Navigating the evolving landscape of sports apparel

The sport apparel sector is demonstrating significant resilience and innovation amid changing consumer trends and economic pressures. Drawing from recent statistics and analyses from Mintel, Statista, and Trend Watching, we observe a dynamic landscape where the fusion of fashion, wellness, and brand loyalty plays a pivotal role in shaping the market's trajectory.

Growth and resilience

The global sports apparel market, as per Statista, was estimated to generate around \$213 billion in revenue in 2023, with projections indicating an increase to approximately \$294 billion by 2030. This robust growth trajectory underscores the sector's resilience, buoyed by consumers' increasing preference for quality, functionality, and brand recognition even amidst the cost of living crisis. Mintel's forecast that consumer spending on sports goods in the UK would reach over £15 billion in 2023 further highlights this trend.

Brand Loyalty vs Economic Squeeze

Despite a strong affinity for well-known brands, with 76% of consumers favouring purchases from established names, the economic squeeze has not left sports goods buyers unaffected. The rise of private labels entering the sports goods market signifies a potential shift, indicating that while brand loyalty remains strong, there is openness to alternatives if economic conditions demand.

Competition and Innovation

The battle among brands is intensifying, with Nike and Adidas facing increasing competition from fast growing brands like Under Armour and Lululemon. The remarkable growth of Lululemon, with net revenue exceeding \$8.1 billion in 2022, showcases the potential for innovation and market penetration by focusing on niche aspects of wellness and community.



Wellness and community

The intersection of physical and mental wellness with sports apparel has become increasingly prominent. The pandemic has elevated consumer awareness and interest in fitness and wellbeing, leading to a sustained demand for brands that offer not just products, but also guidance and community. According to Mintel, 53% of women feel a sense of community when wearing branded sportswear, pointing towards a deeper connection between brand identity and consumer experience.

Consumer preferences

Consumer trends have evolved, with a growing emphasis on health, wellbeing, and the blending of sportswear into everyday fashion. The demand for apparel that is both stylish and functional has led to sportswear being increasingly integrated into daily wardrobes, a trend amplified by the heightened interest in physical fitness and the expectation for brands to contribute positively to physical and mental health.

Authenticity unveiled:

Crafting Integrity and Customer Satisfaction into Business Success.

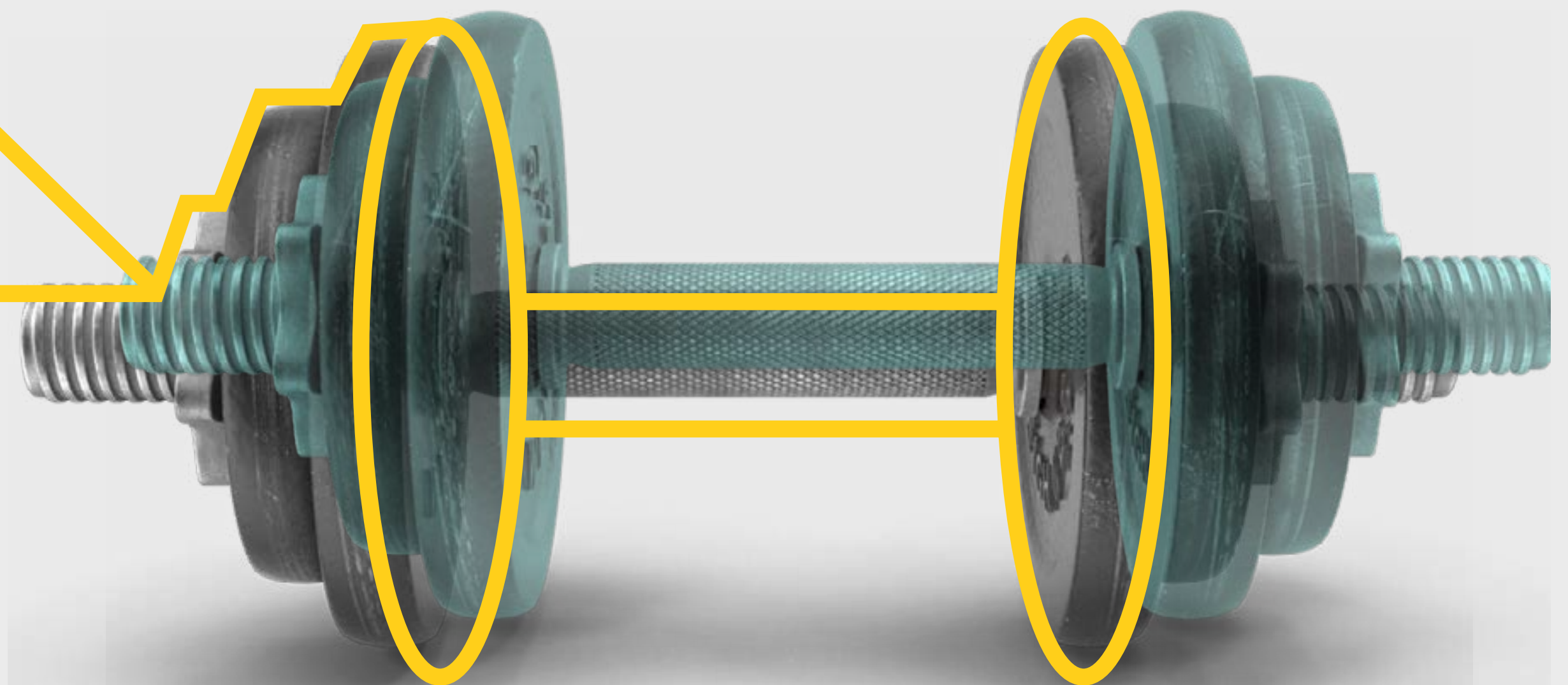
Authenticity (*noun*):

Authenticity is a conceptual approach that combines the principles of authenticity with customer centricity to create a business model or strategy focused on delivering genuine, transparent interactions and services tailored to the unique needs and preferences of customers.

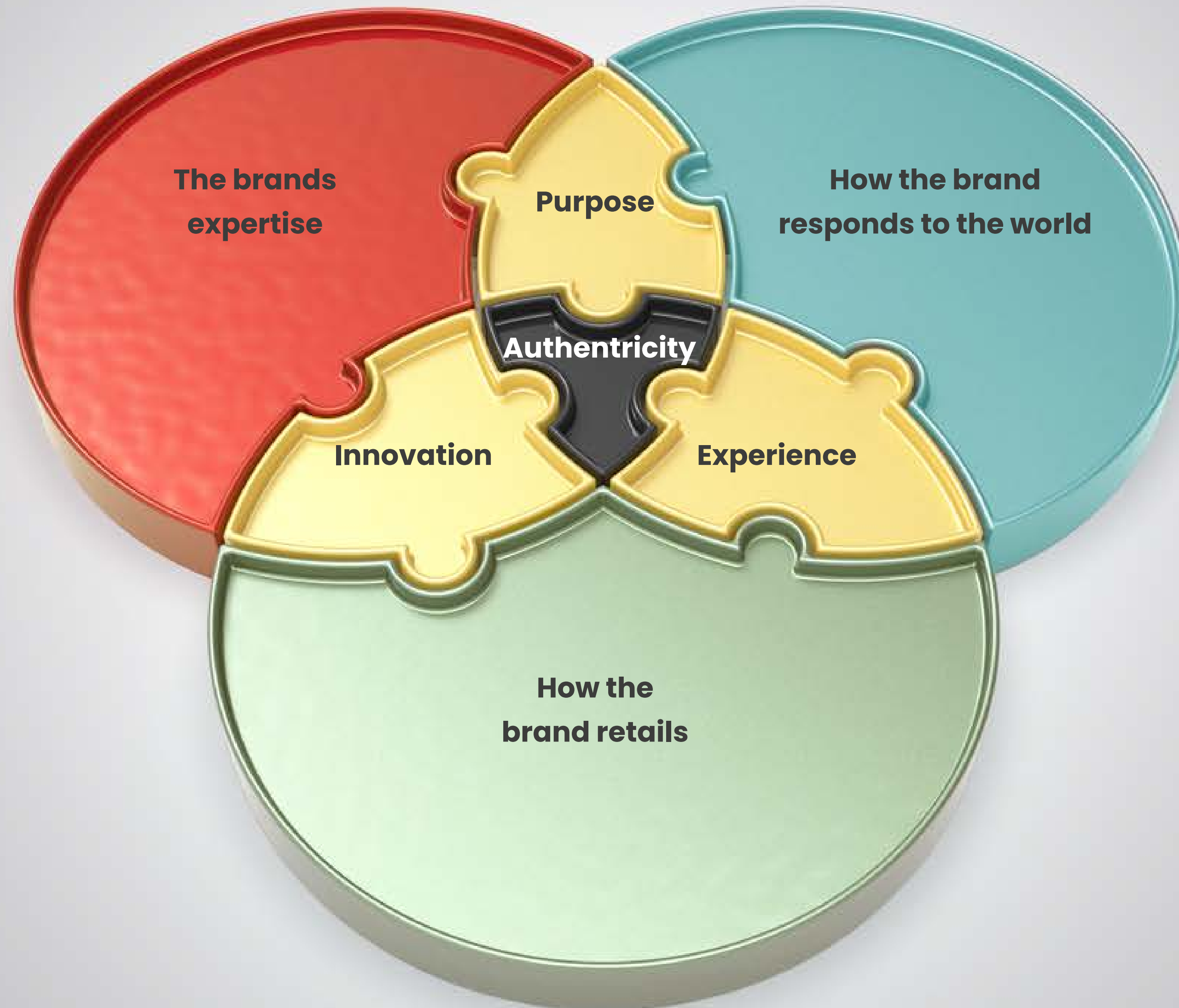
Authenticity emphasises the importance of building trust through honest and sincere communication, products, and services, while also prioritising the customer's experience and satisfaction.

By integrating authenticity with a customer-centric perspective, businesses aim to foster stronger, more meaningful relationships with their customers, ultimately leading to increased loyalty, positive word-of-mouth, and sustainable growth.

Authenticity, therefore, represents a holistic approach to businesses that values integrity and customer satisfaction as key drivers of success.



What is authenticity?



The brands expertise

How they articulate their purpose & how we buy into it.

- Science / engineering
- Methodology
- Recruitment
- Ethic
- Influences
- Marketing
- Branding

How the brand responds to the world

Things that will influence.

- Macro-Trends
- societal changes
- Political,
- Environmental
- Social/Cultural
- Technological
- Legal,
- Economic
- News movements / happenings.

How the brand retails

- Channel – web | bricks & mortar (Consumer choice)
- Product types
- Collabs
- Distribution model (pop-up / retailer / own store / wholesale

Innovation

Where the brands choose to invest

- Tech Innovation
- People
- Science
- Engineering
- Store materials
- Product materials
- Packaging

Experience

- Full Sensorial discovery
- Bricks & mortar
- Consumerverse
- Emotional drivers – emotional theater
- Capture attention / stimulation
- Curated installation – art exhibitions
- Wow moments

Purpose

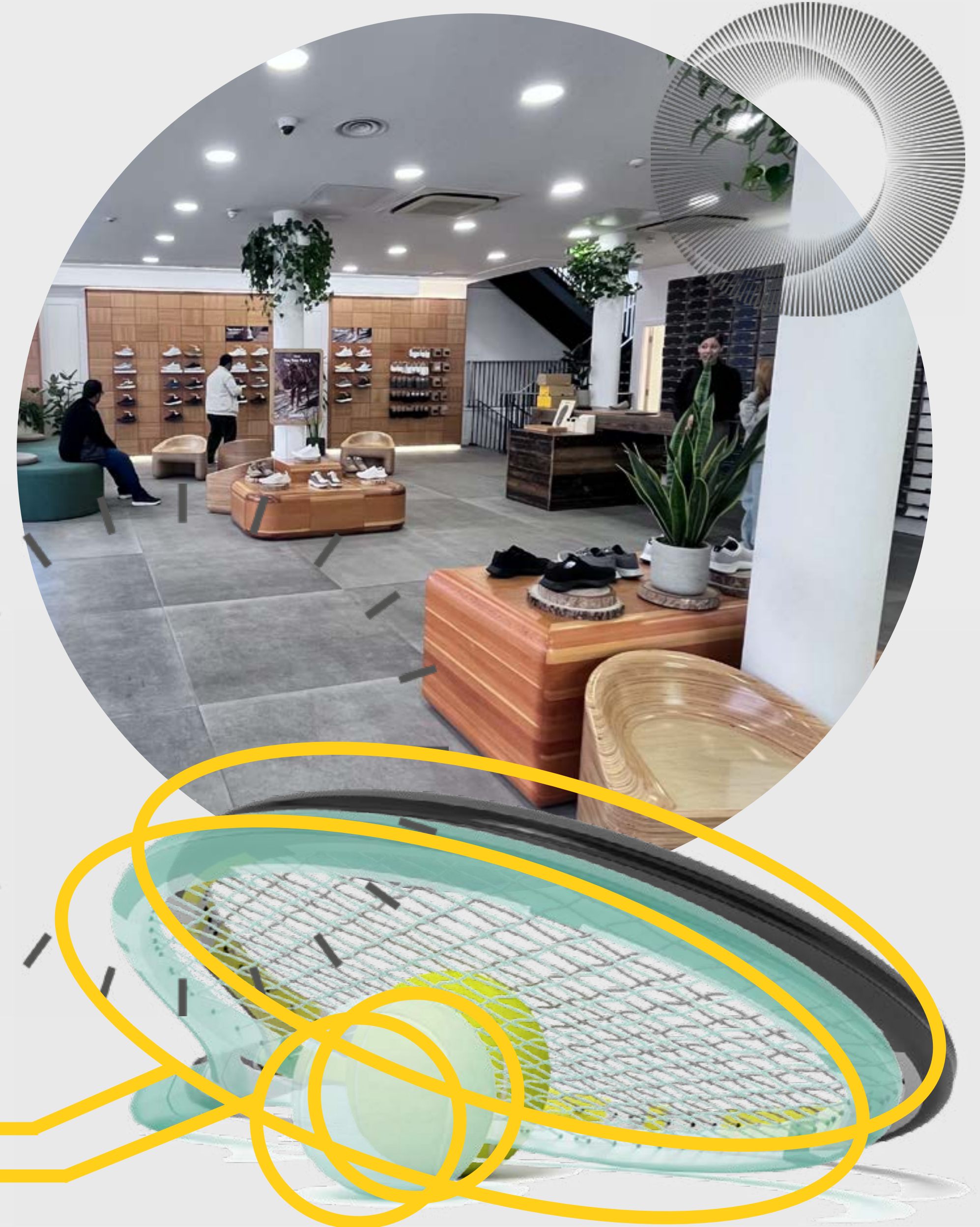
- Human need
- USP
- Consumer needs
- Understanding shoppers emotional triggers to leverage

Creating genuine connections:

The power of authenticity in retail environments

Crafting authentic shopping environments means creating spaces and interactions that genuinely cater to individual customer needs, fostering a sense of value, understanding, and personal connection to the brand.

Authenticity in retail is characterised by personalised service, carefully curated products that resonate with both the brand's identity and the community's tastes, and transparent practices that cultivate trust. The shop's design and layout further contribute by offering a welcoming space that mirrors the brand's essence, complemented by interactive experiences that make shopping a memorable journey, not just a transaction. Embracing this authenticity allows retail shops to stand out, nurture customer loyalty, and establish a community, creating meaningful impacts beyond sales.



Authenticity in action.

In the forthcoming section, we'll delve into six case studies that exemplify authenticity in sports retail, illustrating how authenticity and customer centricity are woven into their retail strategies.

From Allbirds' dedication to sustainability to Kith's cultural richness in Paris, each story is explored further, emphasising the genuine, personalised engagement these brands offer.

Prepare for an insightful exploration of innovative retail spaces where the essence of the brand and the desires of the consumer converge creatively.

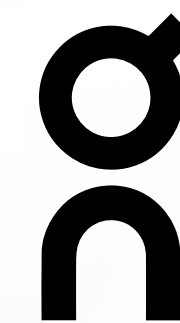


allbirds

HOKA



GYMSHARK 



KITH

allbirds X London

About Allbirds

Founded by a biotech engineer and a footballer, Allbirds prioritise comfort, sustainability, and natural materials in its shoes. Beginning with the merino wool 'Wool Runner', the brand emphasises material innovation and eco-friendly practices. It has become a key player in the footwear industry, focusing on high-quality products, sustainability, and a unique customer experience both online and in-store.



Allbirds has carefully expanded into physical stores, emphasising spaces that not only sell products but immerse consumers in the Allbirds lifestyle. These stores offer a tactile experience to showcase product quality and uniqueness. This strategy highlights Allbirds' commitment to growth, innovation, and becoming a global market leader.



Covent Garden store opened at the end of 2018

At the core of Allbirds' philosophy is a dedication to sustainability and minimizing its carbon footprint, a principle that permeates every aspect of their business, including its retail spaces. They prioritise educating customers on sustainability and have shared eco-friendly materials with other brands, emphasising its commitment to environmental stewardship.

Allbirds tailors its retail strategy to connect deeply with local communities, making genuine adjustments beyond just translating language to ensure a locally relevant and engaging customer experience. This localised approach includes community-specific marketing and events designed to foster a strong connection with customers.

Allbirds' retail spaces are more than just shops; they are embodiments of the brand's core values of sustainability, customer centricity, and community engagement, designed to foster a deeper connection between consumers and the Allbirds mission of making better things in a better way.



Authenticity highlights

- Community initiatives
- Sustainable material
- Sustainable product
- Knowledgeable staff
- Transparency

HOKA X London

About Hoka

Hoka, a brand known for its innovative running shoes, was founded with the aim to improve endurance race times by creating shoes that enhance downhill running speed. This pursuit led to the unexpected reinvention of the running shoe. The brand's ethos is deeply rooted in inspiring movement and supporting athletes of all levels with shoes that offer enhanced cushioning, meticulously-engineered midsoles for a smooth and efficient experience.

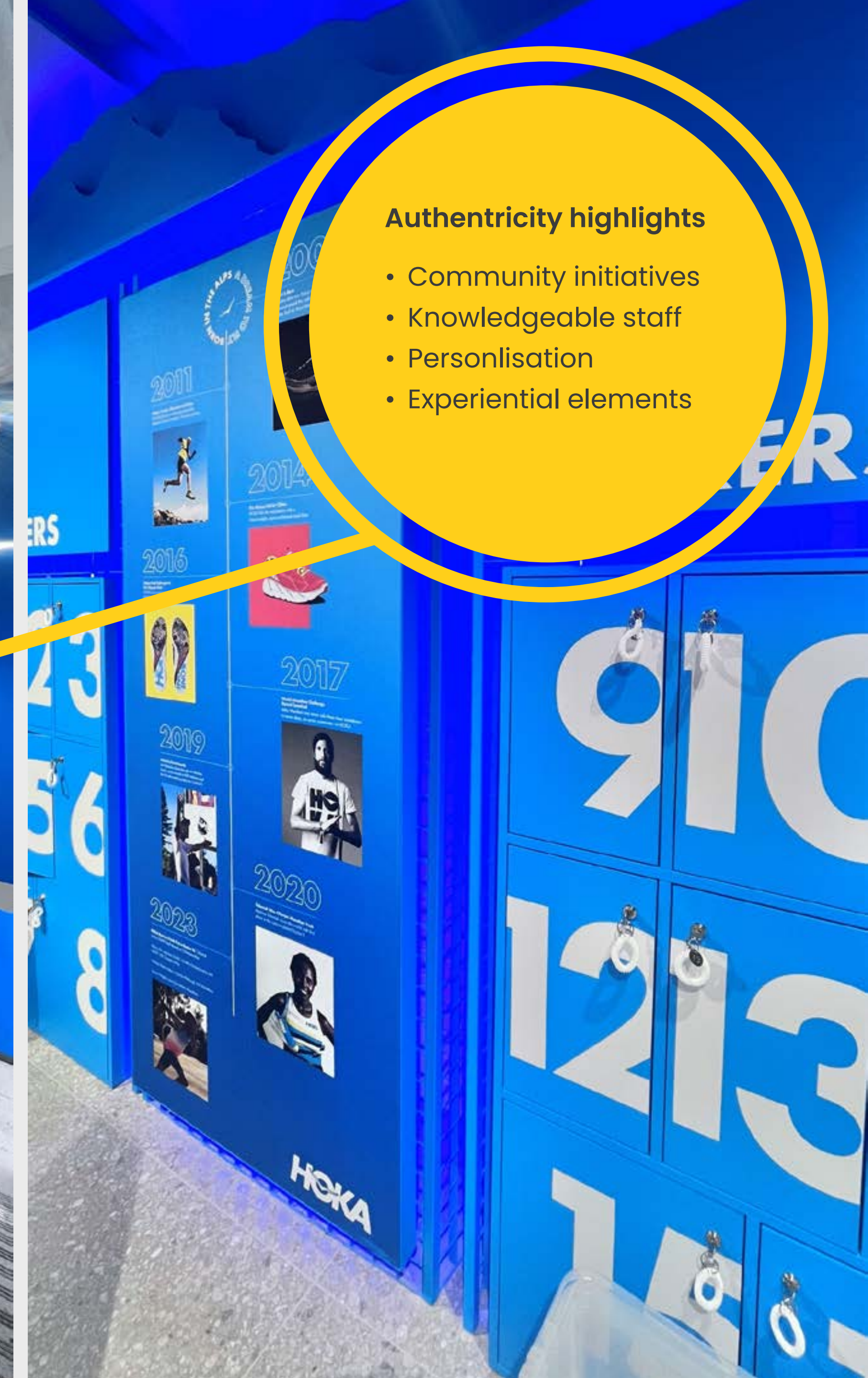
Hoka is delving into physical retail with a focus on creating immersive shopping experiences. Opening their first stores in New York City and Los Angeles, these spaces feature 3D foot-scanning for accurate fit and lockers for convenience while trialling shoes. This move is aimed at enhancing direct customer interaction and community engagement, providing a platform for customers to connect with brand ambassadors and experts. This strategy is part of Hoka's effort to grow its brand presence and improve customer experience through physical stores.



Covent Garden store opened in October 2023

Hoka Covent Garden store in London introduces a design that marries modern aesthetics with natural elements, celebrating the brand's heritage. Spanning 1750 square feet, it features interactive displays promoting joyful movement for all. Its highlight is a community space for engaging with ambassadors, elite athletes, and product experts, hosting activities like yoga, wellness services, and talks. The store has also set up a running club to foster community engagement and offer an immersive brand experience.

Hoka's venture into London's retail landscape with the Covent Garden store highlights its commitment to enhancing their presence and directly connecting with consumers. Beyond offering extensive footwear, apparel, and accessory lines, the store is a conduit for enriching community ties through a schedule of unique in-store events and personalised services.



Authenticity highlights

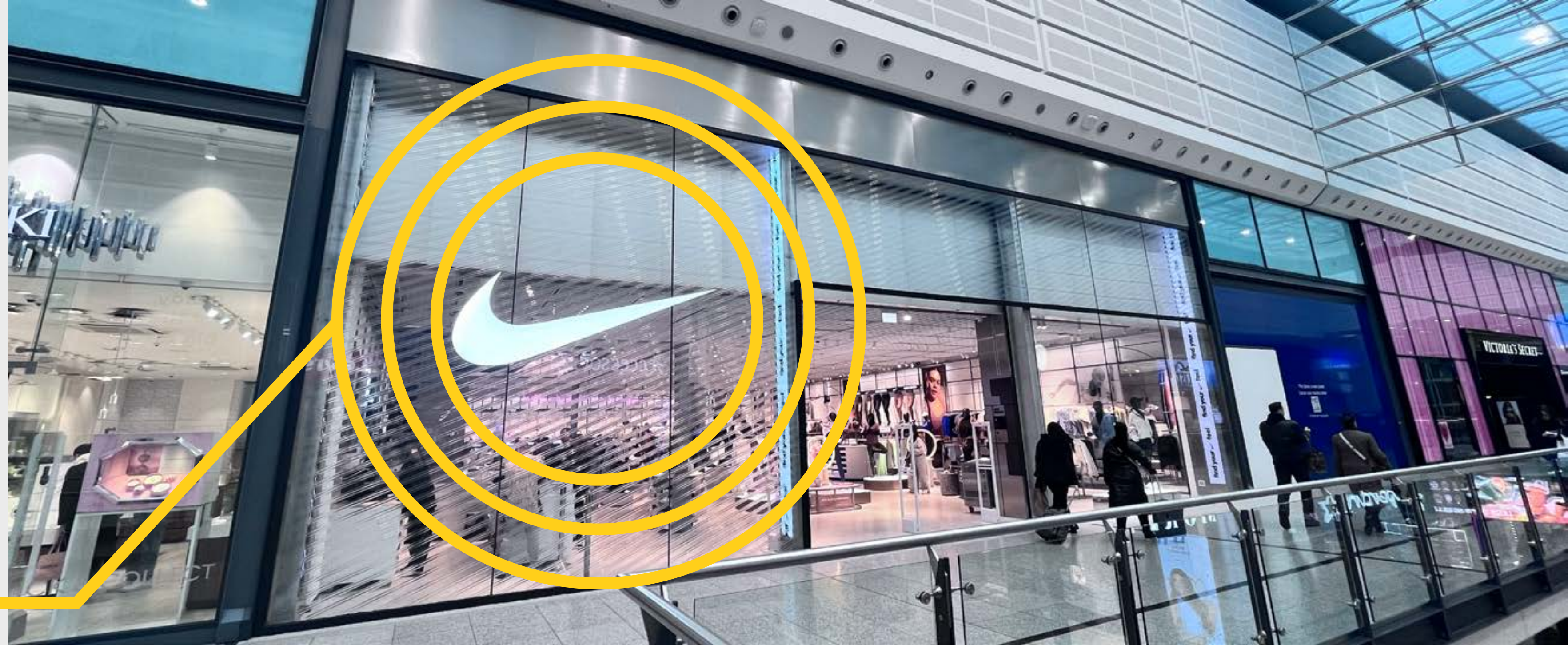
- Community initiatives
- Knowledgeable staff
- Personalisation
- Experiential elements



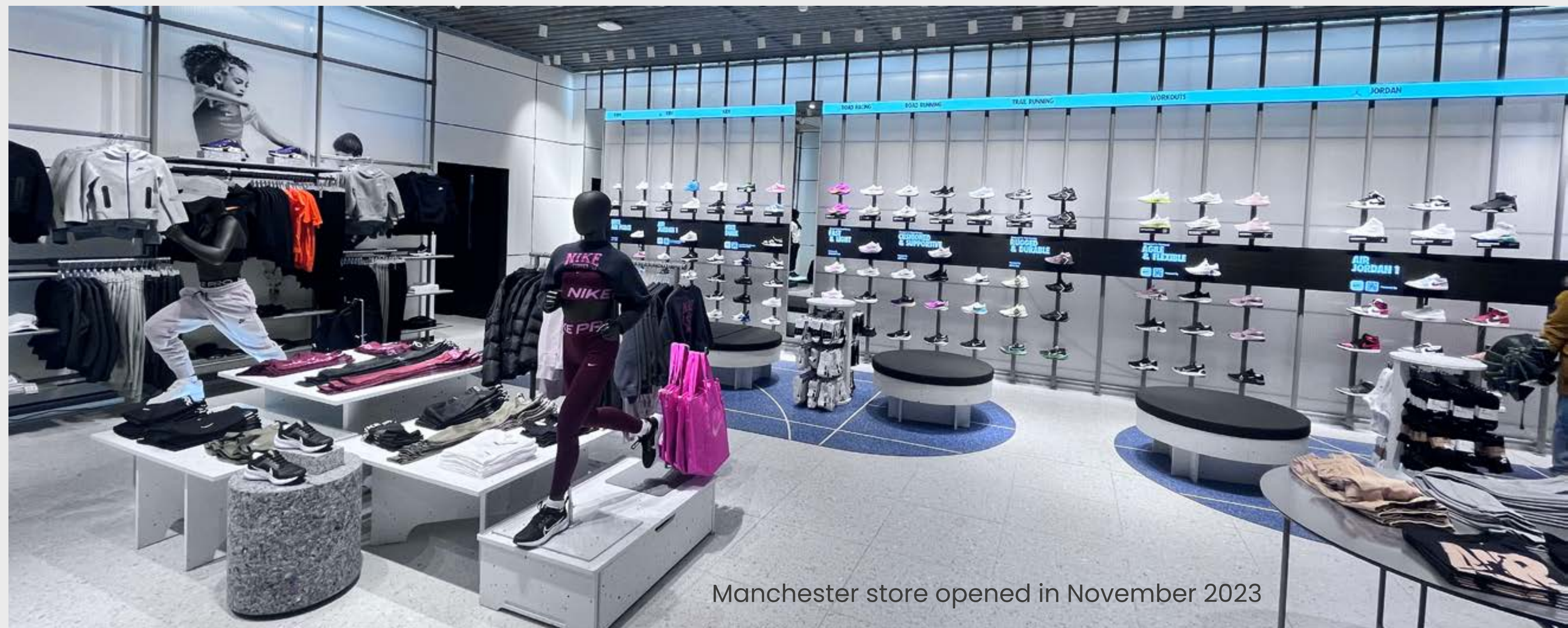
X Manchester + Paris

About Nike

Nike's approach to physical retail is multifaceted and innovative, focusing on direct-to-consumer engagement, experiential store formats, and the integration of digital experiences within physical locations. Its strategy involves several types of stores, each designed to offer unique shopping experiences tailored to different customer needs and local communities.



Nike Rise stores: These stores, which run upwards of 15,000 square feet, are part of Nike's strategy to revamp its retail experience by creating spaces that serve local communities and sports enthusiasts. They feature interactive elements and services, such as one-on-one sessions with Nike staff who specialise in activities like yoga, running, and football, and host weekly speaking events led by local athletes and community leaders. The Guangzhou store, for example, showcases a digital calendar of local sports events and offers Nike Experiences, a feature in the Nike app for event registration and notifications.



Manchester store opened in November 2023

'House of Innovation' flagship stores:

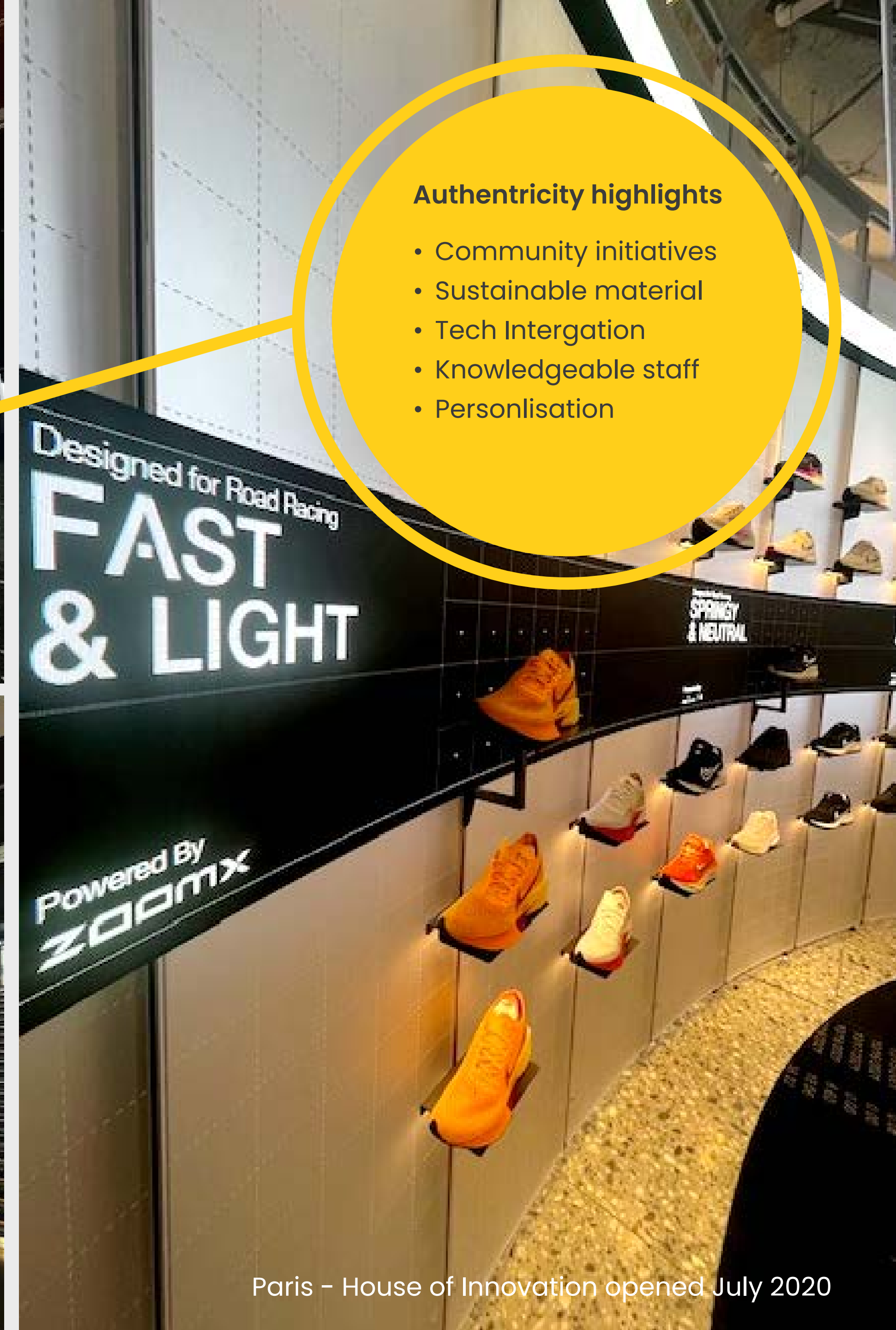
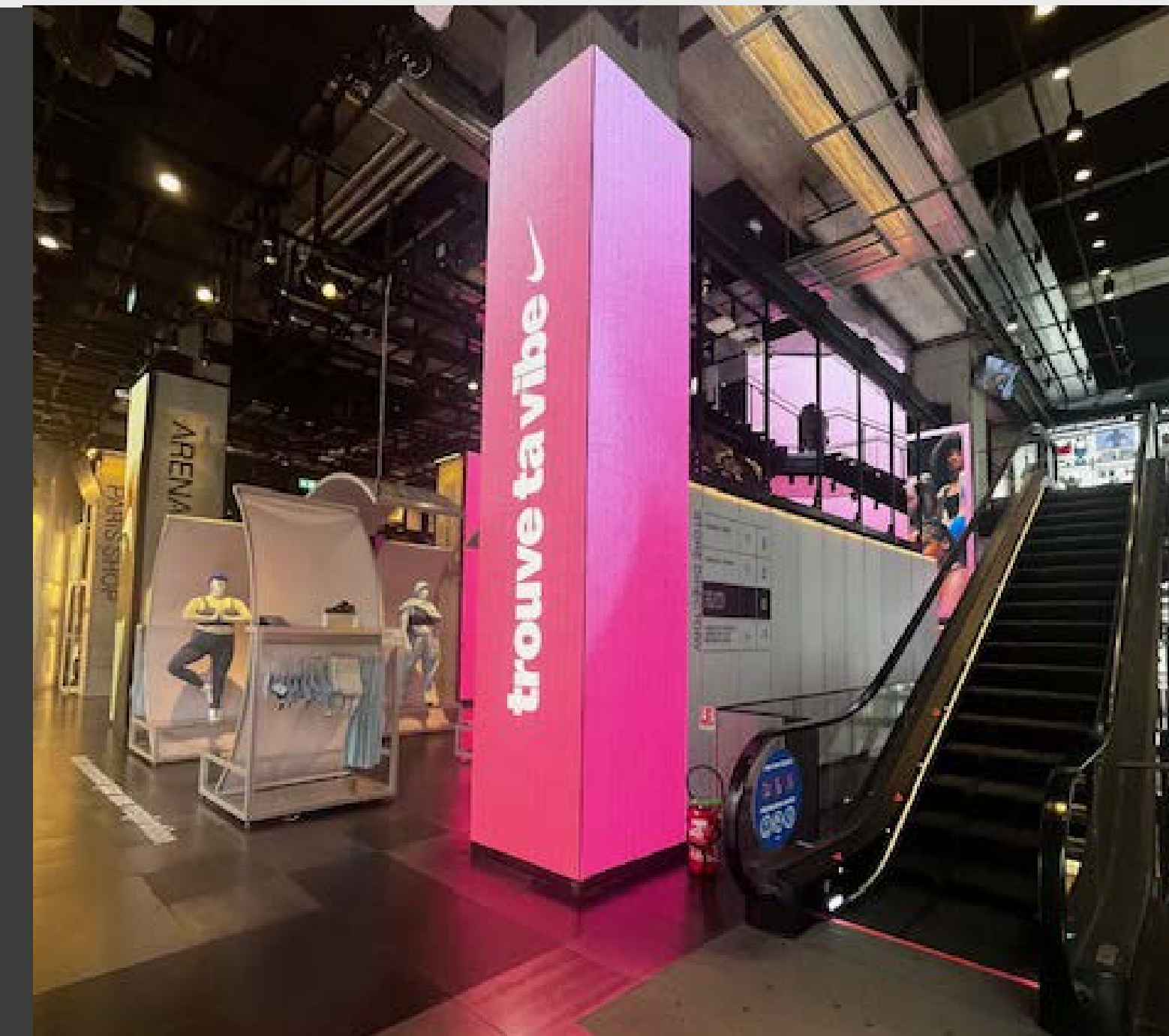
These flagship stores, which can be over 50,000 square feet, are designed to offer an immersive and interactive shopping experience. The House of Innovation stores in cities like Shanghai and New York include features such as mini-basketball courts for product testing and areas for customising products. The design of these stores emphasises Nike's DNA, with each floor conceived as "one floor, one world," incorporating elements from Nike's brand history and using sustainable materials like Nike Grind in their construction.



Authenticity highlights

- Community initiatives
- Sustainable material
- Tech Intergation
- Knowledgeable staff
- Personlisation

Nike is revolutionising its physical retail presence with a multi-layered approach. In Nike Rise stores, they engage local communities with interactive services. House of Innovation flagship stores immerse shoppers in a world reflective of Nike's legacy, utilising sustainable materials. Nike Live stores offer a more personalised experience, aligning product selections with local tastes. Across these platforms, Nike seamlessly fuses digital features with in-store experiences, reinforcing its commitment to direct consumer relations and retail innovation.



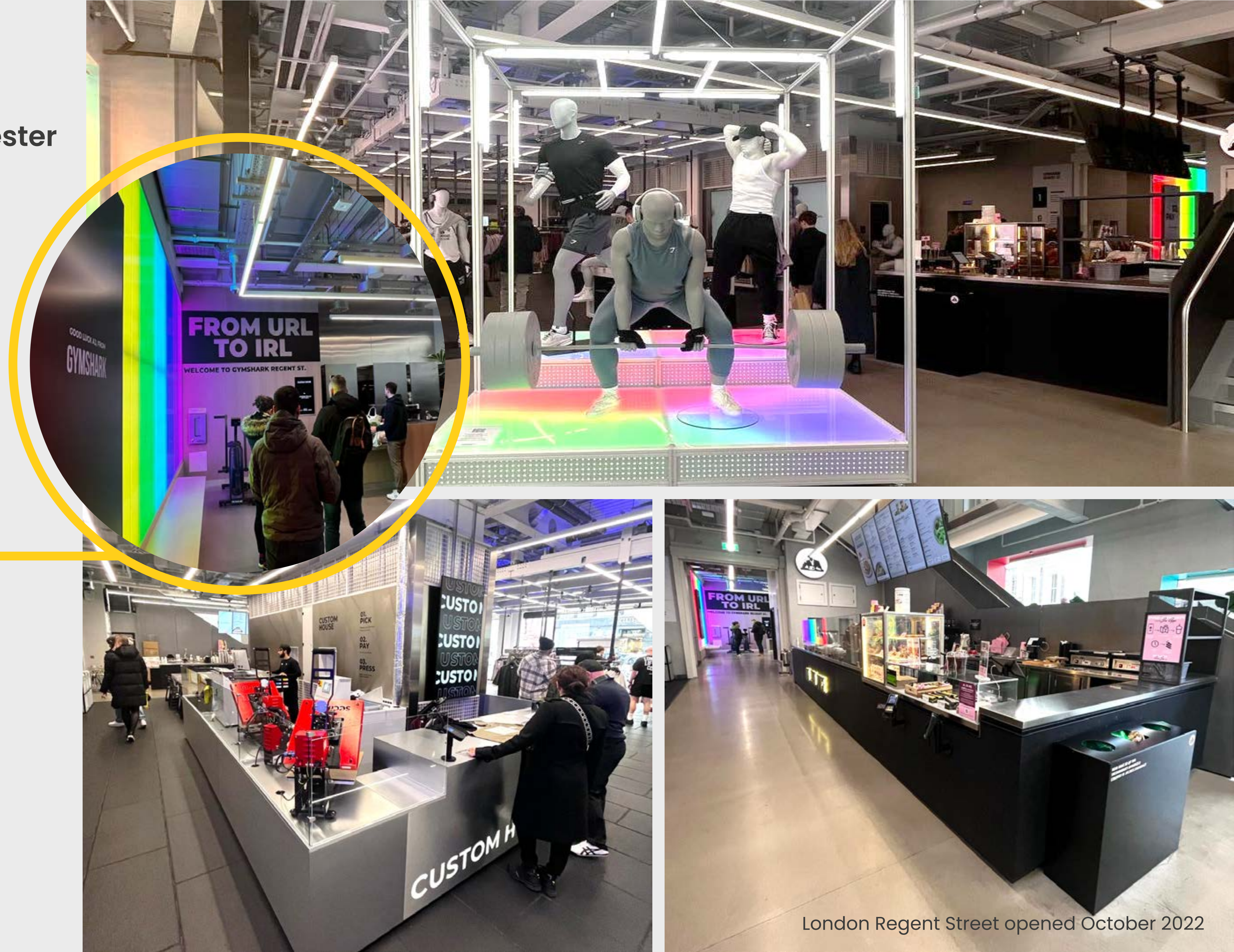


X London + Manchester

About Gymshark

Founded in a UK garage in 2012 by Ben Francis and his high school friends, Gymshark quickly rose from a startup to a global fitness apparel phenomenon, revolutionising how athletes and gym-goers experience workout wear. The brand's rapid ascent is rooted in its innovative product designs that blend performance with style, and a community-centric approach that leverages social media to foster a supportive fitness community.

Gymshark's venture into physical retail, marked by opening a "cathedral" to its brand on London's Regent Street, represents a pivotal move towards blending online and offline experiences. This shop, designed with dedicated spaces for exclusive products, focuses on enhancing customers' fitness journeys through tailored offerings and informative displays, embodying Gymshark's commitment to community and experiential retail.



London Regent Street opened October 2022

Gymshark's recent expansion into Selfridges underscores its strategy for personalised, convenient retail, aligning with CEO Ben Francis's vision for a brand that unites online immediacy with in-store tangibility. This move into high-end retail with features like sweat rooms and VIP shopping enhances their community-driven, experiential approach, invigorating the high street landscape.



Authenticity highlights

- Community
- Personalisation
- Knowledgeable staff
- Convenience
- Online – first brands
- Experiential elements

Gymshark is reshaping fitness retail with a seamless fusion of digital ease and social connectivity in its Regent Street store, enhancing the shopping experience with features like sweat rooms and VIP service. Their recent entry into the esteemed Selfridges department store highlights their growth and commitment to a broader reach. The blend of innovative in-store elements and personalised tech-enabled service encapsulates CEO Ben Francis's goal for a durable, community-focused brand that revitalises retail through a dynamic online-offline integration.



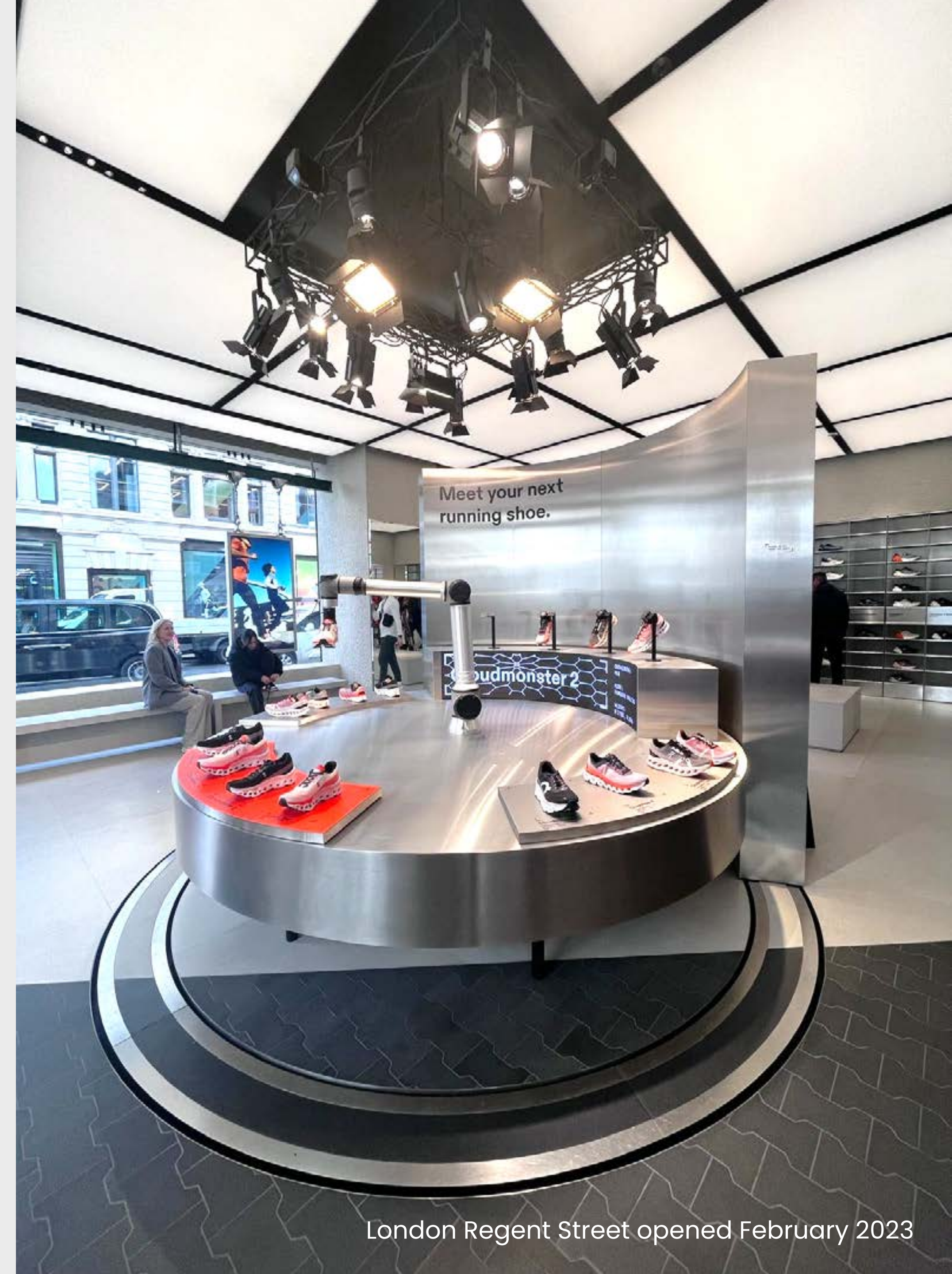
Selfridges Trafford Centre + City Centre opened March 2024
The lower images on this page were sourced from – [Selfridgespress.com](https://www.selfridgespress.com)



About On Running

In the competitive realm of running footwear, On Running has carved a niche for itself since its inception in 2010 by a trio of friends in Zurich. Driven by a mission to revolutionise the sensation of running, the brand introduced its patented CloudTec® cushioning, propelling runners to new heights of performance and comfort. The brand rapidly gained acclaim, fusing Swiss precision engineering with thorough insight into the runner's experience.

On Running's retail strategy, showcased by its Regent Street store in London, prioritises community engagement and the integration of trailblazing retail technology. The store spans three floors and 860 square metres, serving as more than just a retail space—it's a seasonal hub for the running community. The basement is a versatile venue for events and socials, transforming retail into a communal experience.



Echoing their 'Swiss engineering' ethos, On Running's London flagship store is a fusion of innovative technology and a dedication to the natural environment. The store's design and technological features, such as bespoke gait analysis to guide customers to their ideal running shoes, empower shoppers to immerse themselves in On's world. This store marks a significant step in On Running's global retail expansion, which began with their first store in New York in 2020, and a previous pop-up in London, underscoring their commitment to uniting a physical retail presence with community-centric initiatives.



Authenticity highlights

- Community
- Personalisation
- Knowledgeable staff
- Tech integration
- Experiential elements

On Running's Regent Street store is transforming athletic retail with a focus on community and advanced technology. More than a store, it's a lively hub for runners, integrating interactive experiences with 'Swiss Engineering' design and personalised gait analysis. This approach, building on its New York and London ventures, redefines the retail experience by merging hands-on shopping with digital ingenuity.



London Regent Street opened November 2023

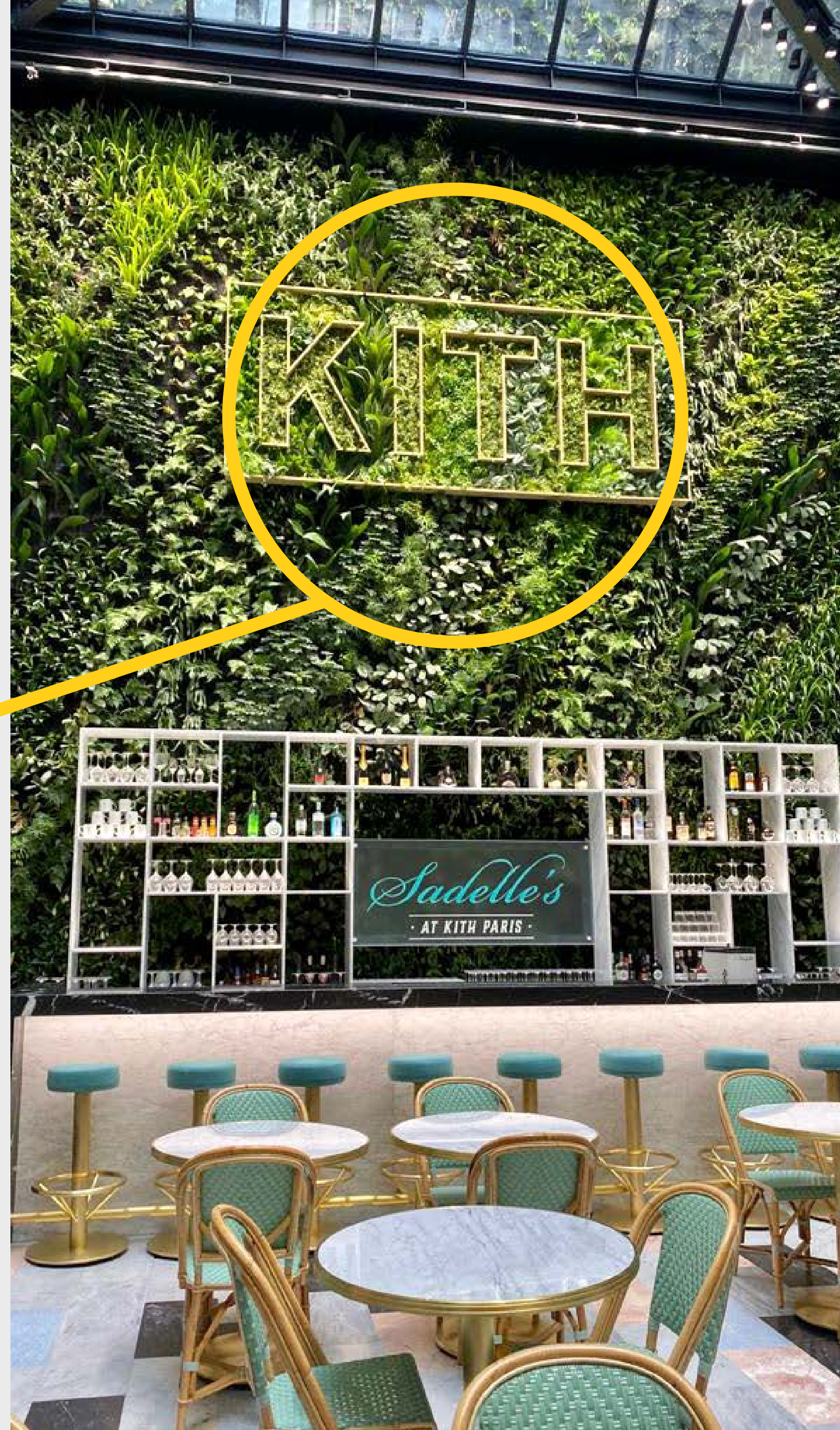
All images on this page were sourced from - On / Remy Castle 2023

KITH X Paris

About Kith

Kith, established in 2011 by the influential Ronnie Fieg, has transcended its roots to become a multifaceted lifestyle brand, straddling the realms of fashion, footwear, and art with a keen eye for avant-garde aesthetics and timeless elegance. Known for its carefully selected products and prestigious collaborations, Kith has cemented itself as a beacon of contemporary culture.

At the heart of Paris, Kith's flagship store unfolds over 16,000 square feet, marrying its New York origin with Parisian sophistication. This emporium is not just a retail space but an experiential venue that pays tribute to the city's rich heritage, including artistic nods to the Pompidou Centre and verdant installations by Patrick Blanc. The Kith Paris experience is enriched by a unique ice cream and cereal bar and a culinary collaboration with New York's Sadelle's, positioning it as a pioneer in the new era of lifestyle destinations.



Kith's expansion from its New York beginnings to international acclaim exemplifies a deep-seated ambition to craft a brand that resonates with community and culture. Its Parisian venture, a blend of local charm and cosmopolitan flair, offers tailor-made services and cultural experiences that epitomise Fieg's vision of enduring brand legacy. Kith Paris stands as a model of how retail can become an experiential bridge to the diverse worlds of fashion, art, and gastronomy, redefining the shopping journey as an immersive narrative of experiential grandeur.



Authenticity highlights

- Community
- Personalisation
- Knowledgeable staff
- Experiential elements



Embracing authenticity: Strategies for retail innovation

The case studies from leading sports retail brands demonstrate the power of 'authenticity'—combining authenticity with customer centricity. These brands excel by creating immersive, sustainable, and community-focused retail experiences. Other sectors can learn from these examples by prioritising:

- **Community Engagement:** Building spaces that serve as community hubs.
- **Sustainability:** Integrating eco-friendly materials and practices.
- **Personalisation:** Offering customised services and products.
- **Digital Integration:** Seamlessly blending online and offline customer experiences.
- **Educational Content:** Providing valuable information to enhance customer knowledge and loyalty.

Retailers across different sectors can adopt these strategies to foster deeper connections with their customers, enhancing the overall shopping experience while reinforcing brand values.

Adopting the principles of 'authenticity', as demonstrated by the earlier examples, offers invaluable lessons for retailers across various sectors. By focusing on community engagement, sustainability, personalisation, digital integration, and educational content, brands can enhance customer connections. This approach not only aligns with consumer values but also fosters brand loyalty, which, in turn, can drive increased sales.

Retailers looking to build deeper relationships with their audiences can emulate these strategies to achieve similar success.

Lucky links.

We are excited to share with you our handpicked selection of sports-themed favorites, designed to captivate and inspire every sports enthusiast. From must-read books and unmissable podcasts to thought-provoking series, documentaries, and the most anticipated sporting events of 2024, we've got you covered. Dive into our collection and discover something new today. Simply click on the images below to explore more about each selection.

Must-read books

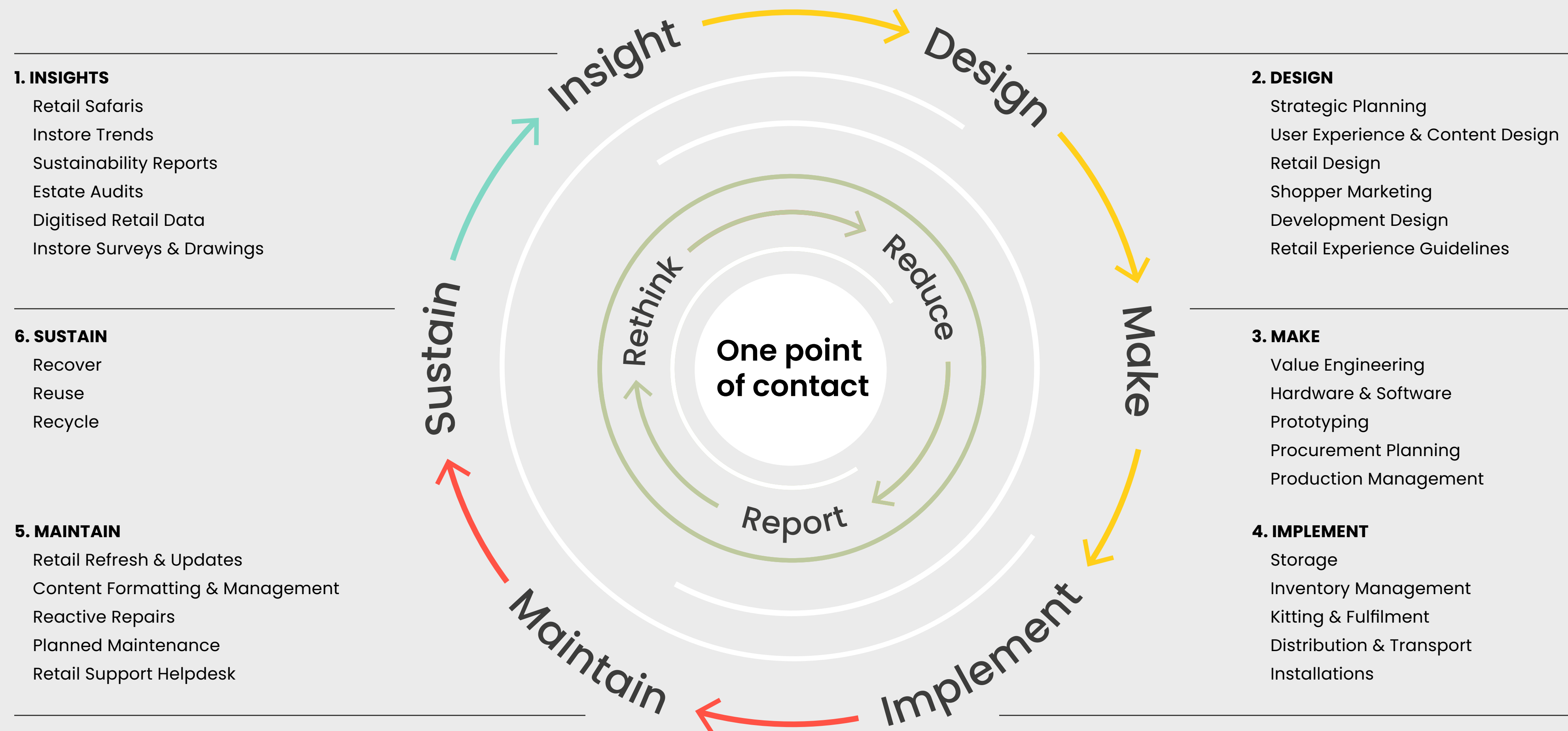
Podcasts you can't miss

Essential viewing

Sporting events

The seamless approach to retail.

100% has designed its business to enable brands to work with flow, less channels of communication and ultimately removing countless commercial margins throughout the supply chain. We reduce project costs and time to market efficiencies.



Can we rethink retail for the better?
UNDOUBTEDLY!

Will your next campaign benefit
from our vast experience and
centrally managed solutions?
100%

Ready to bring your vision to life? Let's discuss your next project and embark on a creative journey together!

To discuss your next project, contact our team: