The consumer behaviour in the sportswear industry

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Strategic marketing with independent project, 30 credits

Halmstad 2015-28-05
Acknowledgments

This thesis is incorporated in the Bachelor’s final validation at the University of Halmstad, Sweden.

We would like to thank, first, Venilton REINERT, our supervisor professor for paying attention to our work and for his helpful comments, critics and pieces of advice.

We also want to thank the University of Halmstad and its professors for providing us interesting lectures that were used for the completion of this thesis but also the campus library for the availability of its literature.

We also would like to appreciate greatly the hundred and forty-nine people who carefully answered our questionnaire and gave us food for thought.

Finally, a special thanks is dedicated to the opponent group, Joanne MARY and Thibaud NAUD for their feedback but also to every other colleague for their support.

Kenza RANEBI

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Abstract

The consumer behaviour study aims at analysing how consumers act on a market or on a special industry. This thesis points out the specificities of the consumer behaviour in the sportswear industry.

This thesis provides insight of consumers, their motives, their choices, their decisions and their differences.

The outcomes of the analysis identify two different behaviours towards sportswear products: the consumption for practice and the consumption for everyday life. These two types of consumption present similarities but also points of divergence.

This thesis can represent a tool for sportswear firms as a clear analysis of their target, or those who can create a target as well.
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1. Introduction

1.1. Background

1.1.1. Sports brands historical background

One of the most famous sportswear stories begins in 1920 with the two Dassler enemy brothers Adolf and Rudolf who thanks to their want to beat each other became the founders of two brands Adidas and Puma (Forbes, 2013). Forty-four years later, the Nike success story started with Bill Bowerman and Phil Knight and their Waffle Nike Shoes that led them to be the biggest sportswear brand nowadays. Fortified by technological patents, sports brands have became iconic products to ensure performance and comfort while practicing sports. (Market Watch, 2014)

1.1.2. From playgrounds to runaway shows

To increase their impact on the audience, sponsoring the biggest athletes in the world had to be done. Indeed, Michael Jordan with Nike or Usain Bolt with Puma (Forbes, 2015) have comforted sports brands to their status of performance guarantor. However, in order to conquer a larger target than those interesting in sports, brands have understood that they need to associate themselves to other persons of influence. Fictional character like Forrest Gump brought some of Nike product to the top as for example the Cortez (Hypebeast, 2015). Also, non-related to sport celebrity have been strongly associated with sportswear brands as the famous singer Rihanna became the Artistic Director of Puma in 2014 (Challenges, 2014). With this new decision, the brand emphasize its want to larger its target to non-sportsmen since Rihanna represent a fashion icon. This example shows how big sports brands gets closer and closer to the fashion world. Regarding the distribution, here again, Nike Products find their place elsewhere than in sports equipment retailers such as Decathlon or Stadium but in athletically inspired apparel and shoes (Forbes, 2015).
1.1.3. Sportswear retailing evolvement and expansion

Whereas retailing activities have been through tough times this last decade, the sportswear segment has known constant growth over the same period of time (Forbes, 2015). Foot Locker is the perfect example. Founded in 1988, this American “athletically inspired shoes” (Foot Locker) retailer operates in 3,243 stores (Foot Locker’s website) located in 23 countries. Worldwide leader on the segment, Foot Locker offers sportswear for a target who most of the time doesn’t practice sports.

JD Sports, the English biggest competitor with its £20 million sales (The guardian) and its foreign expansion in Germany, Spain, France and Italy also prove how successful the sportswear business is. Those two experiences testify of the appetite customers have for athletic inspired apparel and footwear. Thus, consumption behaviours may have evolved too since their consumers are from two types: the sportsmen and the non-sportsmen.

1.2. Problem discussion

The background section has brought many evidences to prove that the consumption of sportswear is not anymore dedicated to the only practice of sports. Indeed, the problem raised here is that a part of the sportswear consumers may be motivated by other factors to justify their purchasing act. It is interesting then to know more about those motivations and the new behaviour towards the sportswear purchase. Thus, the problem discussion is: What are the aspects of the sportswear consumption behaviour nowadays that differ from the traditional one?

1.3. Purpose

We know now from the problem discussion statement that there is clearly a lack of information regarding the consumption of sportswear products for a non-practice use. The idea here is to collect information on sportswear consumers’ behaviour whether they practice sports or not thanks to an elaborated questionnaire with different possibility according to the profile. The aim is to use the results to understand the phenomenon, to provide an insight of the consumer behaviour and on a larger scale, to target in what way this type of consumption
is different from the sportsmen’s one. Thus, what makes this study different from the existing ones is that it takes into account new consumers and their non-similar behaviour. A final use to this thesis could be to serve sportswear company a strong profiling of their diverse consumers and help them targeting with adapted offers if results show strong points of divergence.

1.4. Theory to be applied

As said in the purpose, the heart of this thesis is related to the consumer behaviour. Before going through a collection of data and an analysis of the results, a theory section is useful for two things. The first reason is because it will help the authors to know conduct a proper survey and to collect the right information to find what they really want to know about. Second reason is because it will provide the readers a common thread to follow. It gives them more knowledge about the subject to help understand the purpose of the study and to make their own reading of the results.

Basically, two main theoretical part are developed in the section. First, the analysis of the consumer behaviour. According to Hoyer & McInnis (2001) the consumer behaviour analyses the power of influence on the consumer decisions. However, this definition will be discussed with other points of view such as Kotler’s (2008), Schiffman and Kanuk’s (2000) or Hawkins et al. (2003). How does the consumer behaviour model illustrate regarding the non-sportsmen? This is the type of question that the theory will help answering.

Second important part of the section is the buyer decision process that defines the whole decisions consumers takes before, while and after buying (Kotler, 2008). Even some points of divergence exists between other authors’ points of view regarding this theory (Engel; 1995, Schiffman and Kanuk; 2000), the main idea remains. Same as for the consumer behaviour, the results of the survey will allow the direct application of the buyer decision process to the sportswear consumers.

Last but not least, this thesis analysis will make quite often references to three other dimensions of the purchase behaviour which are first, the importance of communication, then, the role of brands and third, the retailing process. Those three different sections also make
several authors to discuss the notions so that during the analysis, when readers will discover the results, they will be aware of what they are reading.

1.5. Process

This part explains the thesis proceedings that will lead the authors to the problem discussion answer as well as the readers. The whole work is composed of six sections that are successively the introduction, the theoretical part, the methodology, the collection of data, the analysis and the conclusion.

The very first part is the introduction. There, the problem is stated after several observations that conduct authors to reflect on. Also, the purpose is explicitly announced to inform on the contents, what really is the aim of this thesis. An overview of the general work is made in the introduction but without giving any details on the results or on any possible answer.

The second part, that has been previously raised is the theoretical part. This section permits authors and readers to gain knowledge on the subject and to support the analysis that will come later on. The theories are very general and can be applied to any sector, this is why there is no need to enter in the detail of the particular sportswear consumption in this section.

Then comes the methodology section where the aim is to inform on how the work has been done. The methodology section is divided into many other ones regarding each of the available methods that can be used. Also, for each method, the importance is first to know about the method, how to use it, when to use it, or for what purpose to use it but not only. Thus, knowing why one method has been chosen over another one is really interesting. The choice of the method should be adapted to the purpose or the research the authors want to lead which makes this section complex but also decisive. This section also gives the readers the image of everything the authors had to think of and to accomplish even before creating a survey and collecting data.

Once the methodology is settled and the questionnaire is submitted, comes the collection of the data. This section should be particularly precise and well conducted because the whole analysis and the whole problem resolution will stand on those results. If any non-desired thing
happened during the data collection, it can put the whole results in question and damage the trustworthiness of the thesis. In this precise case, collection the data does not only mean looking at the obtained results but asks a bit more of complexity such as crossed variables to show a dependence since this work deals with two possible profiles.

The most important part of this thesis to answer the research question is the analysis section. It is the heart of the work where the results explanation will permit to answer the question and to bring the new dimension to the previous works. The deeper the analysis, the more precise the conclusion and the more reliable the whole paper. In the analysis, the theory and the data are confronted to establish a sportswear consumer behaviour and to know in what it is different or not from the classical that has been established. As it was mention before, the analysis will also make reference to the buying decision process, the communication, the retailing process but also the brand importance to draw the most pertinent profile of the non-sportsmen consumption behaviour.

Last but not least, the conclusion is the final section where complete the introduction. First, the conclusion will explicitly answer the problem question before giving the correct evidences of the affirmation. The conclusion also sums up the whole work by underlying the main points. Also, the regrets, the comments, the visions or the feelings of the authors can be expressed in this part. And to finish, a last opening on further studies can be proposed to go deeper in the subject. Here the fact this thesis can serve as a tool for companies can be listed as a further study.
2. Frame of references

2.1. The consumer behaviour

The consumer behaviour is here the main part of the studied theory since it is the heart of this thesis’ subject. Hoyer & McInnis (2001, p.4) define consumer behaviour as ”Totality of consumers’ decisions with respect to the acquisition, consumption, and disposition of goods, services, time and ideas by (human) decision making units (over time)”. In other words, the analysis of the consumer behaviour aims at answering the six major questions that are: What, Where, When, Why, How do they buy (Schiffman and Kanuk, 2000). Of course, this analysis will deal with the six major questions to bring a general and complete overview of the consumption behaviour in the very particular industry which is the sportswear one. Another point of view in the study of the consumer behaviour may be to focus “on how individuals make decisions to spend their available resources on consumption-related items” (Schiffman and Kanuk, 2000, p.5). The dedication to available resources is interesting since it takes into account the many possibility people have to consume and in which way it will influence their consumption. In their book, Schiffman and Kanuk (2000, p.317) agrees than lower middle-class people are more likely to consume products that provide them an “external point of identification”.

Kotler (2008) have proposed a basic model of consumer behaviour that can be divided in two main points: what usually influences the buyer, which are the stimuli and the buyer’s characteristics, and the buyer responses . For him, Stimuli can be from two different types. They can be internal, which means triggered by the product itself. They correspond to the marketing mix of the product: the product itself and its attributes but also the price, the place and the promotion. And stimuli can be external, which means linked to the external environment (economic, technological, political and cultural).

This basic and universal model of Kotler (2008) does not win unanimous support. Consumer behaviour study is a complex one first because each and every word of Hoyer and McInnis’s definition embraces multiple aspects of consumption (Hoyer & McInnis, 2001) but also because consumers are, themselves, considered as very “complex individuals” (Schiffman & Kanuk, 2000, p.5). This complexity gives different consumer behaviour options according to
Schiffman and Kanuk (2000) who explicitly explain that the study of consumer behaviour often takes as principals that every consumer sort of behaves the same way according to marketing theories. However, many of them wants to take different ways in their consumption habits and prefer differentiated products to match their different needs. This is definitely one of the most important aspects of nowadays consumption with the apex of personalization for instance illustrated by the Nike ID service (Nike).

To increase their profitability, more and more companies choose the consumer-oriented marketing (Schiffman & Kanuk, 2000). This term means that rather creating needs or wants, companies study what consumers want and create products that will surely match their expectations without taking any risks (Schiffman and Kanuk, 2000).

Researchers spend huge amounts of money on the study of consumers to target their expectations and try to fulfil them in the best way (Hawkins et al., 2003). The biggest part of the study is in the influence of the consumption. Despite Hawkins et al. (2003), agree on the fact the consumer behaviour is a conceptual model and cannot be universalized, they even study what are the different sources of the consumption.

For Hawkins et al. (2003) culture is the most important factor. It is actually considered as the only external factor whether it deals with socio-demographic factors or family groups since “it includes almost everything that influences individual’s thought process and behaviours.” (Hawkins et al., 2003, p.28). The main reason why culture defines the consumption behaviour is more the knowing that norms and sanctions exist. Norms will define roles for people and as Hoyer and McInnis (2001) explain, consumer behaviour will for example depends on the role people have (user, decider…). It includes many of them at the same time or just one person (2001). On the other hand, internal factors are mainly known as the motivation, exposure, attention and perception (Hoyer & McInnis, 2001; Hawkins et al. 2003).

These steps in influencing consumer behaviour are crucial since they call on knowledge, understanding and memory which are used during the first step of the buying decision process (Hoyer & McInnis, 2001; Hawkins et al. 2003).
2.2. The buyer decision process

One of the components of the consumer behaviour is the buying decision process (Hawkins et al., 2003). The consumer decision process is the study of how consumers make and take decisions before, while and after buying (Kotler, 2008). In most of minds, consumer behaviour can make reference to the action of taking a decision that is “carefully” evaluated most of a time regarding attributes (Hawkins et al., 2003). Engel names this statement the “rational decision making process” (Engel et al., 1995). However, Engel also defines another type of decision-making based on the search of pleasure or aesthetics. That is called the hedonic (emotion-driven) benefits (Engel et al., 1995).

Schiffman and Kanuk (2000) distinguish three stages in the decision-making process embracing the classical buyer decision process. When most of the model will directly start with the problem recognition, here, the “input stage” is the first of the three. Before recognizing a need, Schiffman and Kanuk (2000) take into account the external influence that either firm’s marketing strategy and the consumer’s environment will provide him/her knowledge on product. There is no question of buying anything special to fulfil a need there. They only make references to the fact consumers are constantly in contact with products or services.

Then, the “process” stage, mainly analyses the influence of diverse factors on the decision-making like the psychological factors or the experience (Schiffman and Kanuk, 2000). Above all, this stage gathers Kotler’s steps in the decision making process before the purchase that is to say, need recognition, pre-purchase search and the evaluation of alternatives (Kotler, 2008). The need recognition and aims at evaluating a problem or a need to which the consumer will find a solution by consuming. The need recognition is influenced by internal or external stimuli as seen in the previous part. This step is crucial for the consumer because the best he/she identifies the needs, the best the choice to fulfil it. Also if the need is well expressed, it will be easier for marketers to develop a corresponding product to what consumers look for (Kotler, 2008).

The information research is when consumers will seek information about products that are willing to match his/her need (Kotler, 2008). Here, the degree of involvement is very important. The degree of involvement in a product or a service will determine how far and
how precise the consumer will look for information concerning this product or service (Engel et al., 1995). The level of involvement will also make a consumer decision complex or not. The higher the involvement, the more complex the decision to take (Hawkins et al. 2003).

The evaluation of alternatives (the last step of the process stage) is the most complex one because it is a decisive one for both companies and consumers. This is where comes the choice between brands or between attributes. In case the consumer is still not decided about the brand he/she will choose, he/she should draw the expectancy value model to compare all of the remaining offers and each of their attributes. By rating them, and making an average score for each of the brand, he/she will know which one to choose (Kotler, 2008).

The last stage identified by Schiffman and Kanuk (2000) is the “output stage” with the purchase behaviour and the post-purchase evaluation. The purchase decision is the final deliberation to choose a product from another one. Finally, the Post Purchase Behaviour, known as the fifth and last step will determine whether or not the product has fulfilled the need (the expectations), whether or not the marketing strategy made this product compatible with the communication around it (the perceived performance): “the larger the gap between the expectations and the performance, the greater the consumer’s dissatisfaction” (Kotler, 2008, p.271). Then, if a consumer buys many times a product he has been previously used, it means he/she had adopted it and the level of satisfaction is high (Schiffman and Kanuk, 2000). But the post-purchase behaviour does not only concern about the matching with the expectations. Schiffman and Kanuk (2000) emphasized the importance to focus how/if products are used, stored, or thrown for a second time if the life cycle allows it.

In 1995, Engel had added another step in this decision making process that seems to be forgotten: the consumption which is right between the purchase and the post-purchase behaviour. According to consumers’ individual differences, (motivation, resources, knowledge, attitudes, values and lifestyle) the product will be consumed differently.

To conclude, the analysis of this buyer decision process is a key factor for companies to build a loyal relationship with their customers. The more corresponding the offer, the more satisfied the client.
2.3. The relative importance of communication towards the purchase behaviour

For approximately more than a decade now, there has been a revolution in the information and communication technologies. Many things are now possible since the coming of Internet, the largest and virtual tool of information and sources, the progress in the digitalization and the launch of specific products that come with it (Castells, 2001). There are “extraordinary advances in computing and telecommunications made possible by the micro-electronics revolution » (Castells, 2001, p.2). As he said in his speech at the Holberg Prize award ceremony in 2012, “the on-going transformation of communication technology in the digital age extends the reach of communication media to all domains of social life”. Thus, if communication technologies have an impact on social life, it should have at least one on the consumer behaviour. So, this ICT revolution could directly affect the consumer behaviour. Many studies were made to try to evaluate and determine the link between promotion and the consumption in the aim to understand in which way and how the purchase could be impacted.

As the marketing mix suggests it, the promotion is an internal stimulus identified by Kotler (2008), as important as the price, the place and the product characteristics in the buyer decision-making process. Indeed, according to Huang (2012), people are not only sensitive to price in the evaluation of alternatives, but also to advertising.

A report was published in the International Journal of Management Research and Business Strategy about this specific question which is the relationship between advertising and consumer behaviour. In this report, they come to the following conclusion: “advertisement worldwide influence the behaviour and attitude formation of consumers.”(Rai, 2013, p.78). In this report, they also use mass media programming as a synonym of advertising. Advertisement enables to create symbols, expectations, dreams and can tell a story about products. On TV, it requires a scenario, a setting and actors: it is like a short movie.

The promotion mix is not only advertising but also events, public relations… This promotion tools are not advertising but medium to give information of the products to customers. “Public relations can contribute to sales in many ways” (Cripps, 2005, p.3) Thus, this is really important because the image of the brand and the product has a direct impact on consumption and purchase decision. According to the previous reference, Public relations influence, among
other things, perception about the product. That is means their role is to control the information but also to control the image of the product in people’s mind. Public relations have to avoid bad press but also to transform or respond to it quickly to pay attention to the customer and make them feel understood (Cripps, 2005).

Moreover, coming back to new technologies, and according to Gartner’s report (2015), offering a digital experience to clients is really essential to touch customers now. Indeed, an article from the newspapers Forbes highlights this idea: “Given the importance of digital in driving customer experience, and the impact it can have on company growth, pursuing a path to digital mastery is critical.” (Calhoon, 2015). Any company should not avoid the digitalisation of the world and, on the contrary, it should take to its own advantage to attract new clients and to carry weight on its market. And the article also underlines that the product also needs “digital operational excellence” (Calhoon, April 2015), which means it has to be an innovative product in that the products itself has to be conceived by new (digital) performing technics. According to a report made by Ernst & Young (2011), digitalisation and the virtual capabilities mean dreams and passions for many people of the Y generation -the digital generation- because it represents the idea that everything is now possible. Their expectations are numerous and they are the “incubators” of change in consumer and corporate environments (Ernst & Young report, 2011, p.5). The digitalisation era means a lot of changes for the companies’ strategy. As the report suggests, “the companies need to develop a comprehensive digital strategy and rethink their business and operating models to deliver the right response to this new demand”. (Ernst & Young report, 2011, p.1)

**2.4. Brands and their role in the consumer behaviour**

The buying decision process model shows how various aspects of the environment or the products can influence the customers when buying. Brand is one of them and surely one of the most important when talking about the sportswear industry. Everyone has heard about Nike or Adidas, but what makes those brands so popular apart from the product attributes?

According to Aaker (1991, p.7), “A brand is a distinguishing name and/or symbol (such as a logo, trademark, or package design) intended to identify the goods or services of
either one seller or a group of sellers, to differentiate those goods or services from those competitors”. Indeed, Brands allow consumers to identify the maker of goods or the provider of the service and will assign a responsibility to it. Brands create a link between the consumer behaviour and the buying decision process. Indeed, brands can provide knowledge when a consumer buys a certain product and remembers it. However, in case this consumer feels a need that can be fulfilled with this product, he/she will wonder if this brand was a good experience or no. This is the information search step of the buying decision process (Keller et al, 2008). In the case of the information search, an important aspect of branding plays a major role: the brand equity. The brand equity is defined by Aaker as the value added to the brand and perceived by the customers. In other words, what a red t-shirt Lacoste will have more than a private label red t-shirt. Is the brand sufficient to provide a value added to the product? Does a brand always provide what it promises? These questions should come to consumers’ mind while buying because both perceived quality and brand associations can contribute to customer’s satisfaction (or dissatisfaction) after the experience of using it (Aaker, 1991). Actually, The best consumers a company can have are people who already consume those company’s products.

Strengthen the relation between companies and firms is one of the major stakes of marketing and brands are a very good way to make this work (LePla & Parker, 2002). Finally, the last point company should not forget when building a brand is that it is must be composed of three elements that will be perceived by the customers: its communication and strategy, its association and principle but also its mission and values (the Integrated Brand Model) (LePla & Parker, 2008). But most important, the more people can reach the third step, the most efficient the brand.

2.5. Retailing

According to Mason & Burns (1998, p.6), “retailing consists of all activities involved in the sale of goods and services to the ultimate consumer.” Thus, it is the channels by which products are delivered to the final consumers. As a matter of fact, Decathlon is known as one of the world's biggest sports retailers, the second one after Intersport, according to an article in EUROSPORT official website (A. Mattei, April 2015). Their aim is to provide sportswear...
products to many people to give them an easy access to practice. Indeed, the positioning of Decathlons is "To encourage participation in sport and make the pleasures and benefits of sport available to the many." (T. Peeters). Sportswear products can be also found in stores that could be called specialized retailers. These stores are stores like Foot Locker or JD Sports. They mainly sell sneakers and some outfits. As JD Sports describes itself in its corporate website, the company is “the leading retailer and distributor of branded sportswear and fashionwear”. And then, sportswear products are presented in casual prêt-à-porter stores which develop a sporty collection as it is the case of H&M, Zara or Gina Tricot. As an article of Daily News published in December 2013 mentions it, there is an “expanded line, which will be branded 'H&M Sport,' features a range of activewear and accessories for men, women and children”. So, sportswear is everywhere and the choice is really large, between branded products and non-branded ones.

Moreover, as graphs found in the Decathlon official website show, the number of their stores has consequently increased for years now. Between 2000 and 2015, the number of stores has more than tripled: from 200 stores to 650 nowadays. This illustrates the fact that retailers are getting more and more numerous. That huge number of retailers can be a real asset for sportswear companies because, according to Mason & Burns (1998, p.247) “consumers purchasing shopping goods prefer to compare the offerings of several stores before deciding what to buy.” Thus, consumers not only have many places to find what they want, but they may have better choice in specialized retailer stores such as JD Sports.

As Durieu wrote (2003), “‘Retailers’ main role is to respond to consumer demand and to offer a range of products”. Thus, thanks to this kind of stores, they can compare the different shoes for example from different brands and see the advantages and disadvantages of each product, and also the material used or the technology. “Speciality goods: items for which consumers will make a special effort to purchase a particular brand.”(Mason & Burns, 1998, p.247): that means the customers are ready to make a particular effort to buy products they like from a specific brand. Some sportswear customers are really keen on this kind of products and they do lots of researches to find the specific product they want.

Last, but not least, sportswear customers also get used to buy their products on the Internet. In fact, Internet can give them a “virtual experience” (Rowley, 1996, p.26). The Internet also provides to the consumer the chance to have access to products that are not retailed in every
store. As Little said (2015, p.2) in the Auckland retail report “Consumers now have more choice than ever before”. They have the opportunity to find what they want in shops or online. “Consumers’ increased access to information, on the go, means shoppers are making more informed decisions, and have greater expectations of the service and offerings retailers can provide.” (Little, 2015, p.2) Thus, the importance of the Internet in the buying decision process is really high because the Internet has a real impact in the analysis of alternatives the purchase decision.
3. Method

After defining the problem and in the aim to solve it, this academic research is needed. According to McCuen (1996, p.13-14), an academic research is a scholarly investigation that gathers numerous resources and that follows an “empirical, rigorous and precise method” in order to find –new– answers to a specific previously identified problem thanks to “both analysis and synthesis”. The research plan consists in determining a process to conduct an experiment and collect different information and then, gather, analyse and organize them in order to communicate the results. (McCuen, 1996)

3.1. Research design

3.1.1. Exploratory, descriptive & causal research

To do a reliable analysis, the category of research design has to be chosen because “it provides a framework for the collection and analysis of data. (Bryman & Bell, 2007, p.40) They point out the importance of the choice of the research design because it should fit with the purpose of the study. According to Baines & Fill (2014), there are three kinds.

The first one is exploratory research. This type of research demands qualitative primary data to understand and highlight a specific phenomenon. It is also based on observations and study cases. (Baines & Fill, 2014) This research is lead as an experiment to get to discover something which was not already well identified.

The second one is descriptive research. As it is named, a descriptive research consists in describing a phenomenon thanks to a comparison of different variables used in a quantitative collection. Secondary data can be used to understand or complete an analysis. (Baines & Fill, 2014) This kind of study enables to create a profile of a phenomenon with all its characteristics and details thanks to observation and measure.

And the third one is causal research or explanatory research. This is a research made to explain the link between one fact or one variable to another one and to show there is a causal connection between them. This uses two variables and answers to a specific, short and simple question. No secondary data is needed. (Baines & Fill, 2014) The aim is to find an
explanation to a phenomenon by testing the level of dependence between two previously chosen variables.

A discussion and comparison between the different designs is needed to choose the one which fits the best. The advantage of the exploratory research is that gives an opportunity for better understanding. Indeed, concepts can be tested, situations can be compared, conclusions can be made, and solutions to some problems can be found. The main limit of this research design is that much qualitative information is needed. The conclusions are based on particular examples and that offers a huge place to interpretation. The analysis depends a lot on subjective points of view. In addition, what is valid for a specific situation is not always practical in every case. So, misunderstandings can appear and mistakes can be made on a larger scale. Regarding the causal research, it gives an easy answer to determine if yes or no there is a link between different independent and known variables. The results are simple to read and they offer the opportunity to get insights. But they can be distorted because of total artificial situations that are created by the research that does not take the whole environment into account. At the contrary, the descriptive research comes to multifaceted approaches thanks to the several variables that can be crossed. The major weakness is the confidentiality because the respondents do not always answer what they think but what they think the interviewer wants to hear. Moreover, they may want to answer quickly not taking much time to wonder.

All the research designs have advantages and disadvantages that give opportunities or weaknesses to conduct a study. The choice should be made according to the research question. Here, the study asks for understanding what are the links between consumers and their attitudes towards the buying process. Thus, the primary data cannot be based on small samples that come to individual conclusions. Furthermore, the whole environment is really important here in the aim to determine the reasons of purchase. To have relevant information that can be used, different variables should be compared because consumers are different and complex with a lot of influences in their choices. A descriptive research was chosen in order to describe a new consumption phenomenon and its consequences on the strategy of the brands.
3.1.2. Qualitative and quantitative research

Two kinds of research could be made: qualitative or quantitative research.

A quantitative research is “explaining phenomena by collecting numerical data that are analysed using mathematically based methods”. (Aliaga & Gunderson, 2000) A single questionnaire submitted to many people is a current way to do a quantitative research. Indeed, according to the British library, it is “a more logical and data-led approach which provides a measure of what people think from a statistical and numerical point of view. Quantitative research can gather a large amount of data that can be easily organised and manipulated into reports for analysis.” Percentage and frequencies can be easily calculated in this situation. So, it is really simple to come to conclusions just describing the figures. The amount of responses give credits to the analysis: the more, the more reliable. Furthermore, the number of responses is a guarantee for objectivity and makes it possible to generalise. The major drawback of this type of research is that the conclusions cannot go deep. Explanations remain succinct and they can be considered weak in a way.

According to Baines and Fill (2014, p.91), qualitative research is a technique to “uncover the underlying motivations behind consumers’ opinions, attitudes, perceptions and behaviour”. According to the British library, a qualitative research is “more focused on how people feel, what they think and why they make certain choices.” This method takes time because the aim is to go in depth to the point and a question can trigger another one. Moreover, this asks for much time to create the contact and build confidence. This kind of research is interesting because it gets really into the problem in order to understand the true reasons, motivations or influences. But, all these aspects are very subjective and depend a lot on many independent influences which cannot be applicable for many people. This type of research is also very slow and expensive.

Here, the research question requires kind of both types of research. First, the idea is to determine the two profiles regarding the use of the sportswear products. A minimum number of responses is required to be able to generalise and define the consumer behaviour. To come to some conclusions here, objectivity is a key element and that cannot be done without a quantitative research. Many answers are needed to be able to establish and to validate the results. But, the definition shows that deeply understanding a phenomenon, here a behaviour, in the aim to identify the wants, influences and motivations, takes time and need developed and
detailed answers. It is not possible to describe the characteristics of a behaviour regarding the consumption of sportswear products without meticulous and in-depth information. In fact, the idea is to get the real reasons of this attitude in order to discover and explain how and why. To go through this complex situation, a compromise should be found because quantitative and qualitative results are needed. Fortunately, it is possible to get some qualitative information in a quantitative research, but not the reverse. Indeed, you can ask several specific questions about, for example, the reasons of the purchase or the importance of identified criteria in a quantitative survey. Thus, having some qualitative data inside a quantitative research is the best solution in this situation. This is why a quantitative research has been chosen to have a representative and more or less a describing situation of the two consumer behaviours.

3.2. Research method

3.2.1. Methodological approach

After defining the research design, it is necessary to connect the theoretical aspects and the data collection. Thus, identifying which methodological approach will be chosen to answer the research question of the study is a major point in the research design. Bryman and Bell (2007) distinguish two types: inductive or deductive.

According to Bryman and Bell (2007), a deductive research starts with the theory and the knowledge already gained. Then, a hypothesis or hypotheses can be deduced. The data collection is specifically guided by those ones in order to test if they are confirmed and rejected. Then, the observation of the results gives the conclusions. Results are guaranteed. “Theory and the hypothesis deduced from it come first and drive the process of gathering data” (Bryman & Bell, 2007, p. 11) In other words, the theory leads to observation and then findings.

Inductive approach can be defined such as “a movement that is in the opposite direction than deduction” (Bryman and Bell, 2007, p.12): it goes from the observation to a new theory. Actually, thanks to a noticed phenomenon, a study is made to understand patterns. Then, hypothesis can be expressed, which lead to a theory. It is a way to generalise a specific phenomenon in a larger scale and “the theory is the outcome of research” (Bryman & Bell, 2007, p.14)
Differences should be pointed out between the two approaches. As a matter of fact, “the deductive process appears very linear - one step follows the other in a clear, logical sequence” (Bryman & Bell, 2007, p.13) But this is not a method that can always be used, especially when other theories come out during the process or when data differ from the initial situation and hypothesis. In those cases, the inductive method can give sense to the data, formulate better hypotheses, provide coherent results or offer alternative method. “There is a certain logic to the idea of developing theories and then testing them. In everyday contexts, we commonly think of theories as things that are quite illuminating but that need to be tested before they can be considered valid or useful.” (Bryman & Bell, 2007, p.13) In other words, each methodological approach needs the other to build trustworthy theories that get to reliable results. They complement each other and none of them is a priori better than the other.

But some may be more adapted to a situation than another. Indeed, the deductive method fits better with quantitative research than qualitative (Bryman & Bell, 2007). The hypotheses that are made thanks to a previous determined theory can be tested in large numbers. On the other side, in the inductive approach, detailed information that go deep into the subject are needed during the observations in order to be able to formulate relevant hypotheses and to come to theoretical conclusions. For this thesis, the approach is still complex. Actually, the purpose is to identify and describe the new consumption behaviour regarding sportswear products: so the analysis may start from observations to go to theoretical conclusions. But to be able to do so, a quantitative research is also needed and was previously chosen. Thus, the deductive approach seems to fit better. Even if it is to explain a new phenomenon, the study starts with a prerequisite and this is the consumer behaviour and the buyer decision process. The theory here is known and previously described and it is used to compare both purchasing attitudes regarding those products. The main aspects of the theory guide the whole research and collection of data. Thus, the thesis is done according to a deductive approach.

3.2.2. Primary and secondary data sources

There are two types of data that can be used. First, according to Hox & Boeije (2005, p.593), the existing data which were “collected for a different purpose and reused for another research question” They are linked to the thesis subject and are important to the analysis. They are called the secondary sources. They can be from different nature: observations, theories,
surveys and any other data medium. They help to know the current environment and to
determine the basis and the starting data of the study.

Then, it is more than necessary to collect new ones, in order to have data regarding the
specific subject. Primary data mean “original data collected for a specific research goal” (Hox
& Boeije, 2005, p.593). The primary data are gathered in the aim to directly have information
to solve the research question. They are oriented in a particular direction to give material to
the authors in the purpose to build an analysis.

The change in the consumption behaviour, that has already been identified, is the starting
point of the thesis, as it is provided in the background section and the frame of references part. Thus, in this study, secondary data are essential in order to confirm this change, noticed by fashion journalists and other specialists. Secondary sources are critical to have key elements about the new trend in consumption because. The secondary data are gathered in the empirical part and most of them are articles from newspapers and the Internet. Secondary data give figures, examples and they justify the need of this study. And because there is a lack of information, figures and details to understand the new attitude towards sportwear products and to identify the characteristics of the buyers, new specific and targeted data are needed. Primary data are the most important format for this thesis because this subject has not lead to many studies yet. Moreover, primary data collection is decisive to answer the research question because they have been made in this purpose. Having figures give not only food for thought but also credit to a study. They are like evidences and they conduct and support an analysis and its conclusion. Thus, for this study both data sources are more sans essential to run the study efficiently because secondary data legitimize the purpose of this thesis, and primary data enable to get reliable answers.

3.3. Data collection strategy

3.3.1. Sources of primary data

There are several methods to collect primary data. First, the survey research, which is,
according to Hox & Boeije (2005, p.594), a research that is made by interviewing people with
“a large number of standardized questions” and giving them coded responses that belong to
predefined categories. This is the most used method because it is simple to make, to compare
many variables, to analyse and especially to collect a lot of answers.
Baines and Fill (2014) define another method which is in-depth interviews such as personal interviewing or focus groups. “The objective is to uncover feelings, attitudes, memory and interpretations from informal conversation to highly structured interviews” (Baines and Fill, 2014, p.93). This is used to get insights through brainstorming and discussions in order to get to conclusions that would not come at first sight.

The case study method, defined by Yin (1989), consists in detailed investigation of one or a few companies about how they deal with the specific studied issue. The aim is to try to identify different solutions to a problem thanks to the examples of some firms. It can be very relevant if deep analysis is done.

Actually, there are plenty of instruments than can be used to collect primary data and the instruments used depend a lot on the design and the strategy of the research. Because, a quantitative research is conducted and because the survey research is used to “collect information about behaviour” (Hox & Boeije, 2005, p.594), the decision was to do a survey research by submitting a questionnaire to many people about the consumption of sportswear products and the new trends. Actually, it is the fastest way to get a lot of standardized answers. The responses can be easily analysed because they are predetermined, so they are quantifiable in a large scale. This is why the case study method is not appropriated for this thesis because the purpose is to determine and describe a phenomenon and its characteristics. This cannot be made with the analysis of some particular and specifics situations which are impossible to generalize. The research is as biased as the conclusions. If a case study research was done there would have been a serious lack of trustworthiness of the results. Otherwise, in-depth interviews show some disadvantages for this study. First, and this was decisive here, it is a very slow and costly method and it belongs more to a qualitative research. This kind of collecting method is subject to variations, interpretations and detailed non-standardized answers. What is more, the interviewer can influence respondents: he can, for example, suggests his/her point of view with his/her ton or in the discussion. Thus, the survey research seems to suit better with the design of this study: quantitative and deductive, and with the available means and constraints which are short time, large sample and simple questions.
3.3.2. Data contact method

There are several contact methods to collect data through a survey: mail, telephone, interviews in person and social networks, according to Schiffman & Kanuk (2000). Thanks to this source, a chart has been made by the authors of this thesis to compare.

<table>
<thead>
<tr>
<th>Methods</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail</td>
<td>- Large distribution</td>
<td>- Not flexible method</td>
</tr>
<tr>
<td></td>
<td>- Honest answers: no influence from the interviewer</td>
<td>- Slow method</td>
</tr>
<tr>
<td></td>
<td>- Low cost</td>
<td>- Low response rate</td>
</tr>
<tr>
<td>Telephone</td>
<td>- Flexible method</td>
<td>- Not standardized answers</td>
</tr>
<tr>
<td></td>
<td>- Interactive method</td>
<td>- Slow method</td>
</tr>
<tr>
<td></td>
<td>- Possible explanations</td>
<td>- High cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Low response rate</td>
</tr>
<tr>
<td>Interviews in person</td>
<td>- Flexible method</td>
<td>- Slow method</td>
</tr>
<tr>
<td></td>
<td>- Interactive method</td>
<td>- Very high cost</td>
</tr>
<tr>
<td></td>
<td>- Goes deeper into the subject</td>
<td>- Difficulty to find right and good samples</td>
</tr>
<tr>
<td>Social networks</td>
<td>- Honest answers thanks to anonymity</td>
<td>- Not flexible method</td>
</tr>
<tr>
<td></td>
<td>- Really easy to submit to many people in the same time</td>
<td>- No control of the sample</td>
</tr>
<tr>
<td></td>
<td>- High response rate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Speed data collection</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Low cost</td>
<td></td>
</tr>
</tbody>
</table>

Thanks to this chart, it is easy to see the advantages and the disadvantages of each collecting method. In this study, the time was limited, such as the money. The collection of data needed to be very efficient. The questionnaire needed a large response rate, in a short time, at very low costs. Because it is a quantitative and not a qualitative study, going deep into the problem with interviews in person would have been a loss of time and money. Thus, the chosen
The collecting method is a questionnaire through social networks because the rapidity and the efficiency are the key points. People can answer to it very easily and quickly thanks to their smartphones or their computers. It takes only a few minutes when they are waiting for the bus or having a short break. Mail, telephone and e-mails are not that efficient because people can hang up the phone, or just forget the questionnaire in their mail box. And then, they have to send it back, which could be really slow. What is more, when you answer through social medias you are likely to be more honest because it is anonymous. As it will be justified in the next part, the non control of the sample is not really a problem here because the sample has to be large and inhomogeneous to have a global idea of the characteristics of the buyers and their purchasing behaviour. Moreover, to be able to compare and to do numerical analysis of the results, the questions should remain the same for everyone. Thus, this is not a disadvantage at all to be a non flexible method.

3.3.3. Sampling

The research has to be submitted to a sample because it cannot be submitted to the whole population. A sample is “a subset of population selected from a frame to draw inferences about a population characteristic”, according to Singh & Singh Mangat (1996, p.5).

A few things should be determined to select a sample. First, who is going to be questioned. Then, how many people should be questioned to obtain relevant information. And third, how the sample has to be selected. (Singh & Singh Mangat, 1996)

To answer the first step of the choice of the sample, the people who have to be questioned are more or less everyone, men and women, children and adults, from all over the world (the subject in a world phenomenon) because the aim is to determine the global consumer behaviour regarding sportswear industry, and then, in the analysis to go deeper in the characteristics of the consumers. As the whole population cannot be questioned and to obtain relevant information in order to have a reliable description of the consumer behaviour, the sample should be quite large. That means at least of 100 people, potentially from different countries, should submit the questionnaire. Then, the sample was randomly chosen because it depended on who wanted to answer and who had access to the questionnaire. Actually, The questionnaire was submitted through the social network Facebook to reach the biggest target as possible, but not everyone could have seen it. It was submitted anonymously; so people answered probably with honestly.
Furthermore, according to Mallet (2006), there are two big types of samples. First, the probability samples are samples that represent the whole population that means each element of the population is represented in proportions but in which all the people inside every element is selected randomly. That enables to calculate the margin of error in the results. The second type, still according to Mallet (2006), is the non-probability samples. They are characterized by a non-probability selection of the diverse elements. But the “disadvantage of such samples is that the findings from the collected data cannot be considered to be statistically representative for the total population” (Kotzab, 2005, p. 134). Thus, all the element of the population can be not represented and that can create errors in the conclusions.

For this study, despite the errors than can be made, a non-probability sample was chosen because, it was too difficult to reach all elements from the whole population. Indeed, there are too many and very different profiles into the whole population. The different proportions are too difficult not only to be respected but also to be known. For this thesis, the aim is to understand and describe the characteristics of the new consumer behaviour regarding sportswear products but it is impossible to ask every new consumers. In this situation, it is really not easy to constitute a probabilistic sample and this prevents the authors from the ability to calculate the margin of errors. Thus, even if the sample is large and randomly chosen, the conclusions will be qualified according to the characteristics of the respondents. Mistakes can be made but a non-probabilistic sample is the only line that can be followed.

3.4. Data analysis strategy

3.4.1. Formulation and contents of the questionnaire

The questionnaire was submitted a couple of times during approximately one month through the social network Facebook on the walls but also on group pages for more visibility. As a matter of fact, a diversified, multicultural and random sample was needed to reach the most interesting results for the studies regarding the characteristics of the research plan. Thanks to this tool, more than two thousands people could have seen the publication. The questionnaire was shared at peak hours in the social networks like around 7.00 or 9.00pm in the week time and around 5.00pm on Sundays afternoon.
The questionnaire was composed of thirty-one questions if you would answer everything. The aim was to make a questionnaire which was easy and quick to answer because many people do not want to take the time to do it if it takes more than five minutes. Most of the questions are single-answer or closed questions because it goes faster and people do not have to think about possibilities. The questionnaire was both in French and English, because the majority of the people that could have seen it are French. The questionnaire was also well designed with a paper front of a logo “Street Wear” to remind the sector of the subject. There were also pictures of sneakers from very famous and popular brands such as Adidas, Nike, New Balance and Saucony. A photo of the défilé of Kanye West at the Fashion Week in Paris in January 2015, an advertising campaign of Nike and a advertising campaign about the new superstars (Adidas) designed by Pharrell Williams were also used. This was to make the questionnaire nice and really attractive to make people appreciate the time they spend on this.

First, the questionnaire starts with two closed questions to identify who is answering. The possible answers for gender are obviously male or female. Regarding the age, big age groups are defined to gather children and teenagers (under 18 years old), young people and students (18-30 years old), young active people (31-45 years old), active people (46-60 years old) and almost retired and retired people (more than 60 years old).

These groups correspond to a next question about who is concern about the new trend. The idea is to compare the age of the person who is answering and one’s response to the new consumers of sportswear products.

Then, comes up the point of the subject which is the change in the consumption regarding sportswear products. The question is a yes/no question and it is really determinative because it opens or closes six questions, depending on the answer. Indeed, if you answer No to the following question “Have you noticed a change in people's minds regarding street wear products and sneakers?” you would have eliminated six questions about when, why and who is concerned about the change. The aim here is to know what people think about the change to determine it better.

Thus, the first question of this part is about when the change occurred and the answers are pre-determined: it could be last year, last five years, between five years and a decade ago, more than a decade ago.

Then, with the next question the idea is to understand who or what could have helped this change. Some answers are suggested like opinion leaders, fashion, sportswear brands or social
media, but you could have add something else because there was an open “other” suggestion compartment. In this question you could have chosen different answers because probably the change was made by many factors.

The following question is a Yes/No question and the goal was to know if people think this change is just a temporary enthusiasm or if it is a real sustainable change.

The fourth question asks about who is concerned by the new trend, as it has been already mentioned before. You could choose different age groups among the ones suggested, which are children, teenagers and young active people, active adults and retired people.

The fifth question is a Yes/No question to know if the person who is submitting the questionnaire is part of the trend or not.

Last but not least, there is a free answer question: Why being part of the trend or not? What do you like or dislike about it?

The question is not mandatory, because in this type of survey, most of the time, people do not want to take the trouble to answer open questions and sometimes that makes them cancelled their response.

The third part of the questionnaire is more about the people who are questioned and their own consumer behaviour regarding these products. The goal is reach our research question to understand what are the motives and the whole process of a buying decision in this sector.

Thus, all the questions are oriented toward the consumer and its attitude regarding this type of products. Some questions are open question: that means people can freely answer. That enables a deeper study of their behaviour.

The first question is about the frequency of the sportswear purchase. The different possible answers are every week, twice a month, once a month, once a semester or once a year. Here the goal is to identify the sportswear addicts and consumers among others who buy sportswear just for fun or because they had one crush on a specific product.

Despite knowing how many times do consumers buy sportswear products, knowing how many times do they wear them is important as well. The next question asks about the frequency of usage (everyday, between four and six times a week, between two and three times a week, or just once a week).

The third one asks about what products are more likely to be bought by consumers: “what do you usually buy as sportswear products?”. Choices to this question are footwear, apparel and accessories. Of course, people can choose as many answers as they want.
Then, the next question is about the criteria of the purchase. Some criteria were selected and they are price, quality, design, material and technology. To answer this question, a what is called a Likert scale is suggested in order to classify and rank the most important factors in the decision-making process and the least important ones. On a five levels scale, people could have choose and order how important are these different criteria. Indeed, with a Likert scale question, usually the respondent is asked to give a quantitative value to define one’s level of agreement/disagreement about the question that is asked. This type of answers has been developed and can be used to also evaluate the importance the different criteria have to the respondent.

The fifth question in this part is a Yes/No question about the sport use of these sportswear products.
The aim is to know if people who buy sportswear use the product to practice to valid our starting statement that people do not wear new sportswear products or not only to do sport but in order to have a sporty style.
Then comes a free answer question about why they use it or not to practice. This question is also not mandatory for the same reasons written for the previous question of this type.

A fourth part of the questionnaire is dedicated the distribution on sportswear products in the aim to understand and even highlight if there is a link between the place and the new trend.
It starts with this one: Do you always find what you are looking for? You have to choose one answer among never, sometimes, often and always. A small yes or no question has been added here to know more about the women offer availability.
Then, there is a question about the place where people find sportswear products. The respondent can choose several compartments (specialised stores, retailers, the Internet...) and can even suggest a new one.
The fourth question regarding distribution is a Yes/No question about the access to these products nowadays. The goal is to understand if people think it is easier or not to buy them.
Then comes the question: Why? Depending on if you answer yes or no to the previous one, you have different propositions and you can choose several ones and suggest new ones.

The last part of the questionnaire is about the direct motives of the buying decision-making process and the feelings the purchase trigger to the customer. There is a Yes/No question
about the brand influence and then, why it could influence (many suggested answers here, and you can choose several ones and add new ones).

Comes a question about what the brand represent to customers. This refers to the Aaker model of brand equity. The different possibilities here are quality, particular style and design, ethic and environmental involvements of the brand, brand community and relationships with opinion leaders. Several answers can be chosen because the brand may represent a few things to customers. In order to evaluate the power of the most popular brand in the sportswear industry, respondents are asked to tell which of them they know or have heard of.

There is a Yes/No question about the perceptual influence of the communication strategies of the brand on customers. The aim here is to make the link between the frame of references part about brands communication strategies in sportswear industry and the customer purchase and loyalty. Also, the next question will precisely show which communication tool used by firms are the more useful for customers.

The answer corresponding to this question will allow to make recommendations for firms but also to analyze the information search stage of the buyer decision process.

Another Yes/No question comes after to know if people are sensitive to digital tools and by-products of sportswear brands and if they use them in order to know if the efforts they make in the communication strategy are that important. Also, a little question asks about whether yes or no people are also familiar with other services that firms offers such as the personalization.

The next question of the questionnaire is to highlight who is interested in sportswear and know about the products, the collaborations, the rarity of some products and who buy just for fun or design. It is a dichotomy question: you can only choose one between two answers.

The last question refers to the hedonic consumption mentioned in the frame of references part. The possible answers are happiness, excitement, enjoyment and nothing. Several answers can be chosen because a feeling does not often come alone.

3.4.2. Distribution and reception of the questionnaire

On April, the 7th, the questionnaire was submitted for the first time on Facebook. Around 70 answers were gathered for this only time. As the number of expected responses was of 150, it has been submitted once more one week later and gathered more than 40 answers. Because the number targeted was not reached, on the 28th of April a final submission of the
questionnaire was made. This questionnaire has been shared on two Facebook profile to make it viral and instantaneous. It was also posted on the student union’s Facebook group because they have a lot of members who can be considered as potential respondents. Finally, 149 answers have been collected on May the 7th.

If the number of friends both Facebook profile’s have on this social network and the member of the student union’s Facebook group are added, it makes 1673 potential people that have been, at a moment, in contact with the questionnaire that means approximately 9 respondents for 100 potential people. Of course, it has to be taken into accounts that “Facebook friends” can mean acquaintances so people don’t necessarily feels like making a favour. Also, many accounts are not active anymore and another reason that can be probable is that a lot of people use this social network to share there questionnaire so it can be understood that after 5 or 6 questionnaire on a “wall” people can be bored to answer some more. However, it could have been expected more than only 149 answers knowing the number of active people on Facebook. A very good number would have been 200 respondents but 149 seems to be enough to have relevant figures.

A pleasant feedback was received from the respondents on the questionnaire first because it was dealing with a trendy aspect of the daily life. Also, the translation in English facilitates the understanding for everyone. Moreover, the way to understand the questions were diversified which makes the questionnaire more attractive.

Generally speaking, Facebook constituted an easy way to get those answers and it was actually the case. If it would have been chosen to directly submitted the questionnaire to people face to face, the result would not have been the same since they could have been feeling like forced to answer instantly. On a social network, they choose the right time to answer properly a questionnaire. The main difficulty remains the fact that not everyone has played the game to answer the questionnaire.

3.4.3. Data analysis process

To make secondary and primary data talk, they will be explained according to two different ways. First, some of the data seem to be relevant by themselves, and so they can be analysed
on their own. Much important information can be obtained just by reading the figures given by the secondary sources and the different answers from the primary data collection. These will be found in the first part of empirical data section.

Then, with the Excel software, the different variables were crossed and compared and some characteristics of the trend would be identified and some explanations could be determined. This software enables to cross variables which means to know how a result is composed regarding different previously chosen variables. In other words, Sphinx enables to split into different categories of respondents another variable. For example, some variables have been studied according to the gender to see if there is a difference between men and women’s answers. The same process has been done with people buying sportswear products for practice and people buying sportswear products for anything else but practice. The results are reported in the last section of the empirical data part. This is the major starting point of the analysis because those results are the necessary ones to conduct the study. Indeed, it is essential to distinguish both categories of consumers regarding the different answers. This is how the two profiles can be described and compared and this is the main tool of the study.

Both results will be confronted to the others in order to confirm some trends, to focus on some aspects or to discuss some potential hasty conclusions.
4. Empirical Data

After redacting and submitting the questionnaire, the results should be analysed in order to answer the specific research question of this thesis about the consumer behaviour in the sportswear industry. This analysis will only present the primary collected data thanks to the survey. Some of the collected data will be cross-referenced to observe phenomena according to the gender or the usage of products.

4.1. Secondary data

In this section, secondary data are presented. Secondary data are data that have been previously collected and presented for another research or another purpose than this one. In this case, secondary data are very much important since they will help understand the classical sportswear consumption which is for the sport practice. This part is then divided into four parts. The first one defines the term “sportswear” as an introduction of the data. The second one gives an overview of the sportswear industry. The third point is very important since it describes the classical consumer behaviour towards the sportswear consumption and will support our findings and analysis afterwards. Last, the importance of the relationship between brands and consumers is raised thanks to three brands’ strategies that are Nike, Under Armour and Lacoste.

4.1.1. What is called sportswear?

First of all, some words must be defined as they will be used in our thesis to make sure that everything is understandable and that it sticks to our main purpose. According to the French dictionary Larousse, sportswear is a commercial word used to name clothes in a sporty style. But the CNRTL definition goes further: sportswear means sporty style clothes, which combine comfort and elegance. This is an interesting definition because that shows sportswear is not only equipment to practice sport but also something designed. The general idea of sportswear seems to have changed as the definition highlights it. Activewear is defined as a synonym.

Sportswear brands are all brands that sell sportswear. And the first ones to consider are the World’s most valuable sports brands in terms of business: Nike, ESPN, Adidas, Reebok,
Under Armour (Forbes). Actually, all the brands that are sold in famous retailers such as Foot Locker or JD Sports, can be considered as sportswear brand and that is where the limit is (or not). Vans, DC, EA7, Fred Perry, are brands that manufacture products not especially to practice classic sport but in a casual style (Vans, Fred Perry, JD Sports’ website).

To go on with this definition, the phrase “fashionable sportswear” needs a clarification. What is called “fashionable” for the Oxford Dictionaries is characteristic of, influenced by, or representing a current popular style.

This theory part is actually crucial to understand what is really at the heart of the thesis. This work does not just talk about the consumer behaviour, it deals with the consumer behaviour in a precise industry: the sportswear industry and tries to connect this industry with the fashion one. Here are various secondary data presented as a support for the theoretical part.

4.1.2. The sportswear industry

This part provides pieces information about the sportswear industry which is the heart of the thesis.

According to Forbes, the global sports apparel market will grow by 4% between 2012 and 2019 (reaching $178 billion). This figure testifies of a healthy industry that does not have trouble facing the economic crisis thanks to a strong and stable appetite for the sports practice. The turnover figures are mostly reached thanks to the “more advanced capitalist” countries (Horne, 2005). However, the Asian Market represents also a non negligible market since its opening but also a serious competitors for the production (Forbes, 2015).

Horne argues that the demand from emerging countries is a key points in the growth of the activity first because sports is a global concept and second because those population has gained in purchasing power and can allow a bigger budget to leisure time such as sports (2005).

Generally talking, the sportswear industry is a consolidated industry where lots of brands are present on the market (Forbes, 2013). Some of the key players as knows as Nike, Puma, Reebok, Under Armour (Forbes 2013). For the only year of 2013, Nike has filed 540 patents.
(A. Cheng, 2014) not only to stay competitive thanks to the innovation but also to show that this company can make dreams come true by creating the power-lacing shoes seen in the movie Back To The Future II (A. Cheng, 2014). In this particular case, the successful company worked on answering demand, even though people who can afford these shoes will be only a few. Nike just proved that it can go beyond the global demand of sportswear. This last point constitutes one of the important stakes of the performance apparel companies today which is going beyond the sports codes and creating a whole new type of products that will be used everyday. Last but not least, the global sports apparel market welcomes today new threaten companies such as Lululemon Athletica or Under Armour that managed to gain a large market share since few years by specializing their offer on the activewear segment where the demand was considerably increasing (Forbes, 2013). The ability of these brands to impose themselves in a competitive market was mainly thanks to a strong understanding of the consumer insight and on its buying decision process.

4.1.3. The “classical” consumer behaviour towards sportswear

In 2004, (despite this date is not that recent) 40 per cent of the total sales of sports goods were dedicated to sports clothing and equipment (Horne, 2005). Footwear represented another 20 per cent at time (Horne). The Cotton Incorporated Insights gives here is an overview of the classical consumer behaviour in the sportswear industry. By classical, they mean, here, consumers who purchase sports apparel for the only use of practicing. Its observation starts with the quality that lead active consumers to buy one product from another one. Comfort/Softness are the first attributes that consumers are looking for with 42% followed by Fit with 24%. When talking about cotton apparel, most consumers describes it as comfortable, fits well, durable and stylish (78%).

Regarding the purchase location for sports apparel, 30% of active consumers are used to buy their apparel in mass merchants that are not specified at all in this industry such as Wal-Mart or Maxi (Cotton Incorporated). The price or the proximity of these stores are a good explanation of this choice. However, 28% of active consumers prefer to purchase in specialty stores such as Sports Authority, Stadium or Decathlon (Cotton Incorporated). In this stores, the environment is more favourable to buy sportswear apparel since there are personal seller to advise on products, a choice is larger than is mass merchants and the impression of buying a real specified apparel is fulfilled. Also it is now more and more common for apparel
Retailers such as H&M or Gap have a sportswear corner to answer the constant demand of sportswear.

The importance of the brand is also noticeable in the motives of buying sportswear. Nike, Adidas, Under Armour, Reebok, or Champion, are among the first towards whom consumers turn (Cotton Incorporated). Indeed, Nike focuses on innovation and style (A. Cheng). Those brands use hungry tactics of marketing to make sure their products are the best in consumer minds.

**4.1.4. Fashionable sportswear: a new lifestyle trend**

Since few years, a new word has appeared in the global sports market which is the *fashionable sportswear* and deals with sportswear equipment putting the stress on the style and being considered as fashion accessorize as during fashion weeks (Sherman, 2014).

According to Smart (2005), sports have been a part of an active lifestyle for occidental countries, and with their constant innovations, brands like Nike have managed to be present in our daily lives as a main occupation. People don’t just do sports, they regularly buy sportswear, they buy sports equipment for home, they get connected to training apps like the Nike Training Club, they publish their performance results instantly, they follow their friends or families’ performance (Horne, 2005)...! Outside of the practice lessons, people are not just talking about how hard it was, but also about their new Adidas Boost shoes and their performances (Sherman, 2014). Style has taken such a big place in the practicing of sports that companies have understood that and have used it to be more competitive.

Nike had seen the opportunities in putting the stress on the style for women’s apparel and launched the first female-targeted catalogue in 2004 (Sherman, 2014). This has also been the case for activewear brands such as Under Armour of Lululemon who combine both of lifestyle and sports apparel (Sherman, 2014).

Thanks to opinion leaders, like Michael Jordan or the Run DMC, sportswear companies have reached a new target without knowing, of non-sportsmen (Horne, 2005). Also, the vulgarization of street arts has lead to expand the phenomenon as explained by Mellery-Pratt (2014). The sneakers addicts are good examples of people buying a pair of Nike Shoes...
for everything else, but for practicing sports. It just reminds them their childhood, a pair they really wanted, but their parents couldn’t afford it (Martin, 2004). In his article, one of the interviewed person, Mr JEBBIA says “They definitely did not used to look at that market and target that customer. But now they do, and for them it’s definitely working” (2004). By this sentence, he means sportswear companies has identified and understood the target because they have interests in doing so. But, if a look is taken at the positioning of the brand and what they want to do, it is no question of targeting a segment where sports is not the first motive of buying (Martin, 2004). As Julie Igarashi, Nike’s vice president of global design for women’s training says “Nike isn’t a fashion brand. We’re listening to the needs of the athletes and we’re solving them with innovative solutions. But we’re acknowledging the fashion side of [women’s] experience with sport. Women don’t have to choose between highly functional, technical product and fashionable product » “R. A. Martins, 2004). To conclude, sports practice stays at the centre of the brands positioning and lifestyles comes afterwards even to target people who would prefer the contrary.

4.1.5. Relationship sportswear brand - customers

According to Castells (2009, p.1475), “Power is based on the control of communication and information”. That means that companies has to take care about its image and pay attention about its communication mix in order to become or stay powerful. The revolution in communications tools is a challenge to every company and they need to deal well with it.

In the aim to have different examples of communication strategies that undeniably have impact on consumers’ purchase decisions, three different companies in this sector will be used to illustrate the previous statement. It is important to precise here that this part is using three examples among many others in order to show to the reader different aspects of the relationship between sportswear brands and customers. The aim is not to conduct a case study but just to illustrate an important concept related to the purchase of those products. Thanks to these three examples from very different brands in the sector, the idea is to prove and show the extent of the possibilities of the customer relationship.

- NIKE

More than a brand, Nike has created a universe. The company launched the n-Nike+ platform in 2006 and created in 2012 a new division in the company called Nike Digital Sport in order
to develop technologies to perform the platform, according to an article from the newspapers Fortune (2012). This platform illustrates the communication strategy of the company: it wants not only to be a seller but also a trainer, a coach. The company tries to “allow users to track their personal statistics in any sport in which they participate.” (Cendrowski, 2012) Indeed, Nike + is composed of several tools according to the official website. For example, the application Running by Nike+ that is available for any kind of smartphones enable the customer to register, analyse and compare one’s running training sessions. This also is a community since you can have friends and share your performances. Coach programs are available and you can lay down challenges for yourself. You can also share photos and synchronized your music. All the features of the app are described on the official website of the brand. Thus, the Nike Community, created thanks to digital and communication tools, is well-developed and, according to the Fortune article, it makes part of the strategy to trigger brand loyalty or to attract new consumers who can use these tools even if they are not, at first, Nike customers. And the digital communication enables the company to be closer to its customers and the customers feel closer to the brand there is an interaction.

The company has diversified its media supports and uses all the available social networks to gather its community. It has as an account on Facebook named Nike + FuelBand, a Tumblr page and different accounts on Instagram, with one especially for women. The idea here is to underline the fact that Nike has understood that practicing sports is now being part of the previous identified trend for women to get fit and take care about their body. The company looks for proximity with its customers. Thus, it tries to reach all its targets and it conveys a very dynamic message through its positioning which is clearly defined in the official website: “Our mission: bring inspiration and innovation to every athlete* in the world. *If you have a body, you are an athlete.” So, the company wants people feel like there is any difference between them and the athletes that use their products. For the brand, everyone has a potential and Nike is going to encourage them to use it. According to a podcast of the Social Media Agency based in Los Angeles, “Nike is world famous as the “Just Do It” brand, so it’s no wonder the brand feels strongly about supporting people’s quest for better health.” (Social Control Official Website, 2015) The communication is very intense and the aim to create a real relationship, a partnership between the brand and its customers.

What is more, the loyalty of the consumers is very high, especially from the consumers of sneakers who are crazy about really specific and rare models. Theses connoisseurs are ready...
to spend a huge amount of money to buy one of these. They hunt down the new launches and the last signature with an artist, an athlete or a retail store in order to find the pair of shoes that not so many people have and can afford. Auction sales are planned and prices can reach new heights like a pair of Nike Jordan worn by the athlete sold for $71,553 at auction, according to an article of the Chicago Sun Times. This highlights the importance of the company to communicate with its loyal clients about its products, the new technologies they use, as their new materials. That is why the company always puts the customer first, according to the President, Director and CEO, Mark G. Parker. There is a loyalty program which is called Nike Club and you can subscribe and have a membership card that gives you many advantages and sales promotion to encourage purchase. According to the article of the Social Media Agency, “The next time you are out buying a new pair of running shoes, you might be more inclined to choose Nike, given that it was a component in furthering your health transformation.” (Social Control Official Website, 2015) Thus, all the communication strategy uses by Nike give them a real advantage on the market.

• UNDER ARMOUR

Under Armour, one of the leader in the American market of technical sportswear products (clothes and shoes), was the US speed skating team’s sponsor at Olympic Games at Sochi in 2014. For this occasion, the company developed new and really aerodynamic racing suits in order to satisfy the team’s requirements. And what they were playing for was a serious challenge, as the Olympic Games can be when you are an athlete. According to an article from Advertising Age (2014), the leading global source of news and analysis for the marketing and media community, the company also wanted to create new products adapted to the customer needs in the aim to develop itself internationally and to better face its first competitor Nike. But the results of team at the Games were not these expected; and actually, they were pretty bad. Thus, the team accused the brand of being responsible of the bad results and this was bad press for the company, until it knew how to manage the crisis. Through this example, the idea was to show that Under Armour was ready to develop new products and technology to satisfy its customers.

The whole communication strategy of the brand is determined by its positioning. From the beginning, the brand has been created towards the men athlete and its requirements regarding innovation. As it is written on the official website of the company, the mission is to make all athletes better through passion, design and the relentless pursuit of innovation. Thus, the
company sells to a niche market. For few years now, the company has decided to diversify its customers, keeping the technical aspects of its products. The company’s achievers decided to also focus on women who “regularly working out”, as Adrienne Lofton Shaw, senior director of women’s marketing at UA, said, according to an article in Adweek Official Website (Heine, 2012). Indeed, the competitors of the brand such as Nike or Asics were already doing it, because it has been a new important segment this past decade and nowadays. So, the company launched the #IWill campaign or the Sweet Every Day campaign in 2012. The campaign had consisted in the creation of a microsite (http://whatsbeautiful.ua.com/) and an application for smartphone that create a community around the gathering ad the sharing of the diverse performances of the women customers (Miller, 2013).

As Plank, the founder and chairman of the company, said, "We’ve built a large women’s business and look at this next phase as a great opportunity to bring dimension to our brand outside of our core men’s apparel business” (Plank, 2014, p.4). This is clear that the new communication strategy, thanks to a diversification in the founding positioning of the brand, has been a real success. The fact that can be highlighted is that the company has identified a new era in the consumption from women and consequently, it has adapted its strategy and so on.

- **LACOSTE**

Created in 1933, the French brand Lacoste is specialised in high-end apparel (for both male and female) (Vogue, 2015). According to Forbes (2012), Lacoste has known a change of style by going from “classic and east coast to international and “Unconventionally Chic””. If the study of the French brand is important for this thesis it is because it has always been linked to sportswear by any forms. First of all because Lacoste is one of the most popular tennis’ players sponsors as well as events like Roland Garros (Forbes, 2012). Thus, the sportswear offer is very different from the Nike because every product is reputed to be high valued and always to make reference to an upper standing. The point is Lacoste has more and more adapted its positioning to the trend and propose many “casual” clothes (Forbes, 2012).

With the Lacoste Live! launch in 2011 (Vogue, 2015) the sportswear customers can appreciate a new range of clothing that is dedicated to young active adults. Indeed, the brand has kept its prices as high as they were, polos still have the same shape but colours, prints, materials used are definitely not the same (Vogue, 2011). The audience has evolved to
become younger and more conscious about a casual or sportswear style. Lacoste is now referenced in retailers like JD Sports but the major part of the consumption takes place in Lacoste stores (Forbes, 2011).

4.2. Primary data

4.2.1. Data collected

This part introduces the results from the data collected. Of course, not all the percentages of the respondents will be presented but the most relevant ones. Some of the answers are graphically represented to have an overview.

The first two questions were to know more about the people who answered as it may have an influence on the analysis of the answers. Women, with a percentage of 60.4% were the ones responding more than men (39.6%). The second question was about the age. People being between 18 and 30 years are the most represented by 92, the 8 other per cent are split between the less than 18 years (1%), the 31-45 years (4%), the 46-60 years (2%) and the more than 61 years (1%).

The second stage of the questionnaire deals with how consumers perceive the change in the consumption of sportswear product. As the chart below shows, 87,90% of the respondents have noticed a change in the sportswear consumption which makes only 12.1% who thinks the contrary.
As explained in the method part, the answer to this question will determine the next questions. Because 12,1% of people has not noticed a change, they did not have access to the next six questions.

According to the answers, the changing has mainly been seen in the last 5 years (54%). Then 23% of people have noticed this changing since between ten and five years ago. 16 other percent has seen this changing really recently, last year and only 7% of the respondents thinks this is an trend that has appeared at least 10 years ago. This pie chart above “When did you notice it?” sums up the latest figures.

After locating the changing on a timeline, the respondents were asked to identify the origins of this changing. Because each of them was able to answer with one or many options, the total of each percentage isn’t equal to 100. For instance, Fashion, which is according to people the first factor that has influenced the sportwear consumption has a percentage of 81,7%. But some of the people who chose Fashion may also have chosen Internet and social media as a second important factor like 52,3% of the respondents. In this order, sportwear brands (49,6%), opinion leaders (30,5%) and society (27,5%) come as relevant answers (“Where does the change come from?” below)
49.6% of the respondents assumes that this is only a matter of time before this new type of consumption will disappear or knows a new change.

The next figures gives an overview of who are the real consumers of this type of products. Like the fifth question, respondents were able to answers with one or many choices and with no surprise, Teenagers and Young active people got the most answers with a percentage of 92.4. Then comes Active Adults with 50.4% and Children with 26%. Retired people only got a small percentage of 3.1 like this chart shows:

The last two questions of this part ask about more personal details of the respondents’ consumption. 66% of the targeted population follow this trend.
To know better what people like or dislike about sportswear to wear as lifestyle products, they have been asked the reasons why they wear or not this type of products. Not everyone has answered to this question because we didn’t ask it as a compulsory question. The biggest part of the answered concerned the style. For people who actually wear sportswear, style and comfort represents the major reasons. Some find sneakers stylish and colourful, some other find sweatpants comfortable. The choice comes as the 3rd answer before the originality and the “accessory” aspect. Another point people raised was the “vintage” characteristics of some products. Last but not least, some of the respondents think sportswear is a way of looking different but this answer is not shared by everyone, which brings us to people giving their reasons why they don’t wear sportswear as lifestyle products. Many of them has answered that almost everyone nowadays wears the same products. Also, the price is still to high to plan to change style. However, the reason that comes most of the time is about the style. Some women find sportswear products are not feminine at all, other think it is only to practice sports and it is not adapted to office jobs. To finish, the ephemeral side of products (with a short product cycle) repulses many of them.

The third step of the questionnaire gives back the opportunity for everyone to answer. The next question asks about the frequency of buying sportwear products (without any mention on the use of the purchase). The majority of the respondents do not purchase sportwear products that often since 38.3% of them answered “once a year” and 40.3% of them answered “Once a semester”. All of the answers are represented on this chart:

![How many times do you buy sportswear products?](image)

According to the next graph, we can see that 65% wear sportswear products every day and that 20% wear them between 4 and 6 times.
Footwear is the type of sportswear products that people usually buy with 124 people up to 149 who has answered this. Apparel is their second choice with 85 of them. Finally, accessories are the less chosen item with only 32 respondents.

Respondents have been asked to rank criteria that were the most important for them during the purchase. The characteristic that buyers have ranked most of the time as the first important is Design with 37.5%. Then the material is at the second place since 38.9% of the respondents have placed materials as the second most important criteria. Both Price and Quality have been placed at the third place of the most important criteria to look at when buying sportswear products with 28.6%. Finally, Technology is considered as the less important criteria with 28.2% of people who has placed it at this spot.

One of the most relevant answers of this questionnaire may be the next ones. At the question “Do you use these products to practice sports?” around 48% of the respondents answered “No”. That means almost half of the people who buy sportswear products do not use them for their original use which is practicing:
... And when they are asked to tell why do they buy these products if it’s not for practice, many of them don’t even do sports! They just think sportswear products are not most of the time adapted to practice but too much focused on the aestheticism.

Next part of these empirical data will concerned the availability to find what consumers are looking for, that is to say the distribution. Generally speaking, people use to find what they are looking for. 51.3% often find what they want and 36% sometimes. However, only 2% never find what they were looking for in their habitual places. They also have noticed that the women offer is more various and available than it used to at 77.1%.

The next graph represents where people are use to buy their sportswear products:
On this chart, we can see that 78 people buy sportswear products at retailers like JD Sports or Foot Locker. Also Sports stores like Stadium are almost as popular with 76 people who have answered that. Resellers remain the least chosen option to buy sportswear. The total of the figures do not make 149 because respondents had the opportunity to answer with one or many answers. This question raises the availability of the choice and about this, 90.7% think sportswear products are much easier to find nowadays than before, which is almost everyone of the respondents. Among the 136 persons who answered yes, 96 thinks its is because more products are available, 87 assumes it is thanks to the expansion of internet and 69 of them says there are more places to find what can match their expectations. However, 14 people still think it has not become easier to find what they are looking for most of the time because the prices are too high but also because the demand is too high and the products they wanted are not available anymore.

The final part of this questionnaire deals with the relationship between brands and customers or between customers and firms. First of all, does brand matter for consumers? Without no surprise, 70% answered that yes, brand does matter for them as a help in their buying decision process. The chart below sums up the reasons that makes brand so important for buyers:

38.1% of those who had answered that brand does matter for them assumes a brand represents a certain style. 22.6% agrees on the fact brands make references to opinion leader they want to identify to and 20.9% makes a link between brands and quality. However, only 3.8% buy certain brands for their ethic and environmental values or commitment.
When we asked about which brands respondents have already heard about here are their answers:

![Graph showing brand awareness](image_url)

Nike, Adidas, Asics, Puma, Reebok New Balance and Le Coq Sportif are the most well known brands. However, Lacoste, Under Armour, Lululemon Activewear, Diadora, Saucony and Majestic were not enough quoted by the respondents.

As seen in the frame of references, brand is a major component of the firms’ marketing strategy.

Does buyers feel concerned or influenced by the sportswear brands’ communication? Actually, only 46.4% assumes their buying decision process is influenced by the firms’ communication strategy which makes a biggest part that says it is not (53.6%). Actually, as this graphs below shows, they are more influenced by the use of sponsoring (55.03%), events (30.9%), billboards (58.4%) and TV commercials (42.96%) than the radio (11.4%), the word of mouth (22.8%) and the point of sales material (35.57%).
Also, the development of apps that is a way for companies to always keep in touch with their customers is not something that is very used by our respondents. Only a quarter of them use regularly digital tools like the Nike Training Club. Also, the study has shown that only 21.47% have already used at least once personalization services such as the Nike iD.

Finally, the next two questions raised the feelings a purchasing of sportswear products can provide to the buyer or the consumer. 107 respondents say they buy sportswear products because they simply had a crush on it, which represents 71.8% and 42 think they buy as connoisseur (28.2%). Last but not least, 70% of respondents admit buying sportswear products provide them happiness and 42% feel excited during the purchase. These figures need to be nuanced by the fact that 53% of people answered “Nothing”.

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This data collection has permit to observe all the results before analysing them. Here are some variables crossing to determine whether or not the fact people are sportsmen or not will influence their consumer behaviour.

### 4.2.2. Crossing variables

In order to go deeper in the analysis, it seemed necessary to cross variables especially to distinguish the point of view of those who buy sportswear to practice sport and those who buy it as casual clothes. Not all the variables but the ones needed for the analysis where crossed. The idea was to better understand the influences for both kinds of consumers. The excel software were used to do so. Here the charts and the results are presented; the analysis of these figures will come in the next part.

First of all, the point is to determine if the characteristics of the people are decisive for the final use. The gender and the use were crossed and 54,44% of women use sportswear to practice and 47,46% of men.

<table>
<thead>
<tr>
<th>CHART 1</th>
<th>USE</th>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENDER</td>
<td>Non / No</td>
<td>Oui / Yes</td>
<td></td>
</tr>
<tr>
<td>Femme / Female</td>
<td>41</td>
<td>49</td>
<td>90</td>
</tr>
<tr>
<td>Homme / Male</td>
<td>31</td>
<td>28</td>
<td>59</td>
</tr>
<tr>
<td>Total</td>
<td>72</td>
<td>77</td>
<td>149</td>
</tr>
</tbody>
</table>

The age was also compared and only the data from the 18-30 years old category is workable in this situation. A bit more than one young above two use sportswear as day’s life apparel:

<table>
<thead>
<tr>
<th>CHART 2</th>
<th>USE</th>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGE</td>
<td>Non / No</td>
<td>Oui / Yes</td>
<td></td>
</tr>
<tr>
<td>&lt; 18</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>&gt; 61</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>18 - 30</td>
<td>67</td>
<td>71</td>
<td>138</td>
</tr>
<tr>
<td>31 - 45</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>46 - 60</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Total</td>
<td>72</td>
<td>77</td>
<td>149</td>
</tr>
</tbody>
</table>

Then, the different criteria were crossed with the final use variable to identify which criteria are important for both categories of customers. Thus, the price, the quality, the design, the material and the technology ranking were analysed.
The consumer behaviour in the sportswear industry

The results are almost the same for the one who use sportswear to practice and the others. Regarding the people with a non-sporty use, almost ¾ of these people ranks the price between 3 and 5 on a scale from 1 to 5 (5 meaning it is strongly important). Around 60% of them put the quality on rank 3 or 4. For 41,67% of them, the design is at 5. For more than 1/3 of them material reaches the rank 4. Finally, more than ½ people rank the technology between 1 and 2.

Regarding people who use sportswear as sport equipment, almost 60% of theses people ranks the price between 3 and 4. 33,77% of them put the quality on rank 4 and the design on rank 5. Then, more than ½ people also rank the technology between 1 and 2.
Then, it seemed interesting to compare the influence of the communication of the brands on the consumption and still the use variable. The results are qualified. For both kind of consumers, the sample is divided in two equal part: 50/50.

<table>
<thead>
<tr>
<th>CHART 8 COMMUNICATION</th>
<th>USE Non / No</th>
<th>Oui / Yes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non / No</td>
<td>38</td>
<td>41</td>
<td>79</td>
</tr>
<tr>
<td>Oui / Yes</td>
<td>34</td>
<td>36</td>
<td>70</td>
</tr>
<tr>
<td>Total</td>
<td>72</td>
<td>77</td>
<td>149</td>
</tr>
</tbody>
</table>

The variable brand importance which refers to the question “Is the brand important to you?” was crossed with still the same variable. It seems that clearly the brand is for both: 76.39% of people who use sportswear in their daily life and 64.93% for the other ones.

<table>
<thead>
<tr>
<th>CHART 9 BRAND IMPORTANCE</th>
<th>USE Non / No</th>
<th>Oui / Yes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non / Non</td>
<td>17</td>
<td>27</td>
<td>44</td>
</tr>
<tr>
<td>Oui / Yes</td>
<td>55</td>
<td>50</td>
<td>105</td>
</tr>
<tr>
<td>Total</td>
<td>72</td>
<td>77</td>
<td>149</td>
</tr>
</tbody>
</table>

The next chart is about the perceived diversification and the multiplication of the women offer crossed with the gender variable. 74.44% of women agree and 81.36% of men do.

<table>
<thead>
<tr>
<th>CHART 10 WOMEN OFFER</th>
<th>GENDER Homme / Male</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non / No</td>
<td>23</td>
<td>11</td>
</tr>
<tr>
<td>Oui / Yes</td>
<td>67</td>
<td>48</td>
</tr>
<tr>
<td>Total</td>
<td>90</td>
<td>59</td>
</tr>
</tbody>
</table>

Then, the variable use was again compared with now the following aspects: the use of connected tools, the kind of communication means that influence the most, the purchase frequency and the place where the purchase is done.

<table>
<thead>
<tr>
<th>CHART 11 CONNECTED TOOLS</th>
<th>USE Non / No</th>
<th>Oui / Yes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non / No</td>
<td>48</td>
<td>64</td>
<td>112</td>
</tr>
<tr>
<td>Oui / Yes</td>
<td>24</td>
<td>13</td>
<td>37</td>
</tr>
<tr>
<td>Total</td>
<td>72</td>
<td>77</td>
<td>149</td>
</tr>
</tbody>
</table>

Regarding connected tools, they are generally are really not much used whether it is by people who purchase only to practice with 83.12% or to wear on daily life with 61.54%.
The consumer behaviour in the sportswear industry

Regarding the communication means and their relative importance in the purchase, the chart shows that the most important communication mean is billboards for non sporty users (69.44%) and is sponsoring for sporty users (57.14%).

<table>
<thead>
<tr>
<th>CHART 12</th>
<th>USE COMMUNICATION MEANS</th>
<th>USE</th>
<th>Non / No</th>
<th>Oui / Yes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billboards</td>
<td></td>
<td></td>
<td>50</td>
<td>37</td>
<td>87</td>
</tr>
<tr>
<td>Sponsoring</td>
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<td>TV commercials</td>
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</tr>
<tr>
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<td></td>
<td>23</td>
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<td>54</td>
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<td>Events</td>
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<tr>
<td>Word of mouth</td>
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<td>34</td>
</tr>
<tr>
<td>Radio</td>
<td></td>
<td></td>
<td>7</td>
<td>10</td>
<td>17</td>
</tr>
</tbody>
</table>

| Total | 72 | 77 | 149 |

Regarding the purchase frequency, it appears that one customer upon two that buy to wear casually buy sportswear once between one or three times on a semester. And almost ½ people who buy to practice buy products once a year.

<table>
<thead>
<tr>
<th>CHART 13</th>
<th>USE PURCHASE FREQUENCY</th>
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<th>Non / No</th>
<th>Oui / Yes</th>
<th>Total</th>
</tr>
</thead>
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<td>1 fois par an / Once a year</td>
<td></td>
<td></td>
<td>20</td>
<td>37</td>
<td>57</td>
</tr>
<tr>
<td>1 fois par mois / Once a month</td>
<td></td>
<td></td>
<td>17</td>
<td>7</td>
<td>24</td>
</tr>
<tr>
<td>1 fois par trimestre / Once a semestre</td>
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<td></td>
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<tr>
<td>2 fois par mois / Twice a month</td>
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<td></td>
<td>5</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Toutes les semaines / Every week</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

| Total | 72 | 77 | 149 |

Finally, about the place of purchase, the ones who buy to practice prefer sport stores with 70.13% of them and the others prefer specialized retailers such as JD Sport or Foot Locker and the Internet with respectively 56.94% and 51.39%.

<table>
<thead>
<tr>
<th>CHART 14</th>
<th>USE WHERE</th>
<th>USE</th>
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<th>Oui / Yes</th>
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<td>1</td>
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<td>Independents</td>
<td></td>
<td></td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

| Total | 72 | 77 | 149 |
4.2.3. What can be generally said about the collected figures?

This section presents general and basic information about the collected data. It observed the three basic characteristics of the sample, first to know more about the respondents and second because some of these figures may have an impact on the next analysis. As seen previously in the empirical data part, the sample is composed of 149 people who responded through an online questionnaire submitted on Facebook. 60.4% of these people where women, so the last 39.6% were men. This might be explained by the fact women were the most in contact with the questionnaire. Actually, no studied reason can explain this proportion. However, these two percentages can be used, as explained previously, to compare women and men consumption.

Regarding the age of the respondents, the major part (92%) of them is between 18 and 30 years old. This huge amount is the reflexion of people who were in contact with the questionnaire on Facebook. Thus, the figures resulting from the questionnaire mainly concern young adults and the study of the consumer behaviour can be precised as the study of the young adults consumer behaviour in the sportswear industry.

The last important basic characteristic of this sample is that 52% of them buy sportswear products to practice. It is relevant to know about this figure because almost every question asks about the behaviour towards sportswear products. However, if only 52% of the sample practice sports, then why does the other 48% buy and wear sportswear products? Here is the main particularity raised in the research question. Indeed, there are now two types of people who are willing to buy sportswear products but for a different use. What is interesting in this observation is that the whole analysis will be able to compare the two types of consumers to identify the points of similarities and the points of divergence. Not every aspect of the consumer behaviour and the buying decision process will be compared, but the most relevant ones.

With the latest proportion, the new trend that has been brought out many times during this thesis is now clear: an important part of the sportswear consumers are actually buying sportswear products for everything but for practicing. What is even more impressive is that this personal question is only asked in the middle of this questionnaire. However, the third question already asks people if they are aware a new trend. Without even giving any notice by what is meant by “a change in people’s mind”, 87.9% of the respondents agree on a change.
They were also able to observe and to identify this new trend. 54% of them think the change has come since last than five years. 23% think it was more between five and ten years ago. Those thinking the change was the earliest may be those who identified it at its premises. Also, respondents have various thoughts about what has influenced the change. For 81.7% of them, fashion has clearly played a role in the sportswear consumption’s.

Indeed, fashion is a phenomenon that rarely lasts, new things, idea, style are constantly brought which involve a change. Furthermore, fashion finds its inspiration every wear, and lately, the streetwear and sports brand collection were a great source of inspiration (Sherman, 2014).

The expansion of the Internet and social media is the second reason perceived by the respondent. The Internet is a useful tool to share rapidly, even instantaneously tons of information (Castells, 2001). Thus, as soon as someone post a little revolution in the sportswear, this information will go global in a second. Phenomenon spread at a huge speed so there is no need to wait for years before a change can be seen.

The third sources of influence for the change in the sportswear consumption is identified as sportswear brands themselves. It has been seen in the secondary data that brands like Under Armour or Nike have adapted some part of their offer to reach new segment like the women segment or the activewear segment (Sherman, 2014). It is then true that even sportswear brand managed to create a new trend in the consumption thanks to their strategy.

Finally, the impact of opinion leaders is something that have been perceived by the respondents at 30.5%. Michael Jordan’s collaboration with Nike may surely be the first example to think of. Despite his successful career in basketball, this former American player had a huge influence on some parts of the society. Moreover, his multiple careers (actors, basketball player, baseball player, Nike ambassador) give him the opportunity to touch different segments.

With no surprise, the panel thinks with 92.4% teenagers and young active people are the new customers of this change. This figure reflects the age of the panel. Because young active people have been interrogated, they may feel very concerned about this trend. Generally
talking, they are the most likely to consume sportswear products for a different use than sportswear.

Even though, this trend has been identified (by some of the respondents) as starting ten years ago, almost half of the whole panel (49/6%) thinks this is only a matter of time before this trend disappears. By this figure, people mean this trend does not have strong basis to last in time. If it is a fashion movement, than yes, as it has been explained before, fashion is constantly evolving so this trend has many reasons to be ephemeral.
5. Analysis

The analysis part aims to analyse the different aspects of the purpose in order to answer the research question that is to say: What are the aspects of the nowadays sportswear consumption behaviour that differ from the traditional one? Two things result from this research question. The first one is there are two kinds of consumer behaviours regarding sportswear products: a traditional one which is to practice sport and another new one which is not to practice. The idea is to understand the motivations and the reasons of the purchase. The second one is that the final use of the products distinguishes two profiles of consumers. The aim is to determine all their characteristics and to know why and how they are different. Since the analysis should be guided by the theory, this part will be divided according to every characteristic of the consumer behaviour as it was already defined, as well as the buyer decision process. Secondary and primary data are the source of reflection to justify explanations, observations and conclusions.

5.1. Consumer behaviour

The first part of the purpose is to determinate the consumer behaviour towards sportswear products. As the result of 88.1% of the respondents agree and the different secondary sources that mention it, it was noticed in the previous parts that a change has occurred in the consumption. Thanks to the following analysis of primary and secondary data, the features of the new customers and what influence them will be clearly delivered.

As it was defined in the theoretical part, the consumer behaviour can be divided into three main points (Kotler, 2008) The first point is obviously the buyer’s characteristics and its complexity (Kotler, 2008; Hoyer & McInnis, 2001; Schiffman & Kanuk, 2000). Since there is a change in the consumption, the new customers have to be identified, as well as the reason why they are part of the new consumers and what they have in common. In fact, a new market has appeared: the one of people who buy sportswear products not to practice. Indeed, almost 50% of the respondents do not use sportswear as sport equipment. In order to know more about those people, several variables were crossed thanks to Excel functionality, such as the gender and the final use, or the age and the final use. Those results were obtained. For
information, the variable USE is the variable that corresponds to the question “Do you use sportswear to practice?” Thus, the consumers that are potentially part of the new ones are the one who answered “No” to the question.

Chart 1 and 2 from the crossing variables show that women as well as men are concerned about the new trend because 46% of women and 52% of men use sportswear as casual clothes. The women use of these products as prêt-à-porter is noticeable because they are not known to be very feminine at first. Thus, the fact that almost one woman above two wear it casually, that means this is a real opportunity and a true new market, in order to confirm what some brands have identified “women who regularly workout” (Adrienne Lofton Shaw, 2012) as a new target. The second graph is only relevant for people between 18 and 30 years old because figures are not enough numerous for the other age categories. But for young people the result is interesting: 49%, that is to say one above two, wear sporty products in their today’s life. This highlights a huge potential market because the conclusion can be made that one above two has at least sometimes, a sporty style.

As a conclusion, it can be said that women and young people are especially identified as the new consumers of sportswear products.

A very specific sub-trend was very quickly identified in the secondary data: the sneakers addicts. Actually, they are people who are totally keen on sport shoes. There are lots of specialized websites, books which were edited, many pages are dedicated to those people and the products in social networks. These people sometimes seek really deep among private resells, latest launches, limited collection or special collaborations with stores or artists in order to have an almost unique pair of shoes. For that, they are ready to pay a huge amount of money, like not only hundreds but sometimes thousands of euros, as it was noticed in a previous part. Actually, auction sales take place for some really rare shoes like ones wore by M. Jordan or other opinion leaders, or very limited edition. This is what can be called the sneakers way of living, because it is “not only a shoe but a daily culture” as a specialized website describes it. Sneakers are a real credo. It was necessary to detail a bit about these consumers, even if no data was collected about them, or even to identify them, because they are part of a niche in the consumption of sportswear. What can be said is that the more people know numerous brands and buy their sportswear in various places, the more likely they are to be part of this group.
The second main point of the consumer behaviour as it was described in the theoretical part is the internal stimuli, which mean the internal features of the products. (Kotler, 2008) The point here is to understand what are the link between the customers and the criteria that matter to them, for sportsmen and non-sportsmen and if there is a difference. Young people and women are more likely to follow trends and rather look for pretty design.

It is important to clarify that here what is called sportsmen means people who buy sportswear only to practice, and non-sportsmen the ones who buy them for a casual use. That do not mean that the “non-sportsmen” do not practice at all but they buy the sportswear products not in the aim to use it to practice.

First, the variable called use and the different characteristics variables we compared to get to valid conclusions. In the charts 3, 4, 5 and 6, the scale is 1 means it is not important and 5 means it is very important.

Regarding price, thanks to chart 3 that crossed the variable price criteria and use of sportswear products, it can be said that it is pretty the same ranking for sportsmen and non-sportsmen with a relative importance. In the secondary data about the «classical» consumer behaviour (section 4.1.3) confirms that the quality is a criteria that lead active consumers to buy one product from another one. And quality seems to be as important as price. Thus, those two variables are probably connected. For non-sportsmen, this explanation stands too. Actually, sportswear products are often considered as expensive. So, it can be said that consumers are expecting a certain quality guaranteed by the brand and the price.

In order to valid what was supposed previously, and according to chart 4 (comparison between design criteria and use), the design is really important for those products. As it was noticed in the secondary data (4.1.4 Fashionable sportswear: a new lifestyle trend), companies in this sector put the stress on the style because it is very important for both kinds of consumers. And according to the responses, no matter if the customers will use them to practice sport, the looking is the most essential characteristic. This confirms the society phenomenon to be looked on appearance.
Regarding material characteristics, for sportsmen it is quite important: almost one person above two who practice with sportswear agrees that it is essential. Indeed, material has to be adapted according to the practiced sport and allow a certain performance. It is also very important for a non-sporty use because good material implies comfort.

Non-sportsmen may no be focused on the technology that could bring them a certain performance. However, for sportsmen, it could be expected that technology plays a major role in the search of the best performance, but according to the data collected, sportsmen consumers do not focus on it.

To summarize this analysis about criteria, it appears that both sportsmen and non-sportsmen ranked the choice criteria in the same way. First, design is the point they will first pay attention to. Second, the material used for the products is very important. Quality and price are both criteria that sportsmen and non-sportsmen have ranked at the third place because of the price/quality. Then, regarding technology, it is the last aspect that sportsmen and non-sportsmen take a look at.

Then, about the internal stimuli, it seems clever to analyse the impact of the communication tools. The question is to determine the link between the consumption, the use and the communication/branding of those products. Communication from brands is more or less for both sportsmen and non-sportsmen as it is showed in chart 8. Indeed, no matter people use sportswear to practice, they both agree at only 50% that communication has an impact on their consumption. Thus, communication has neither a strong nor a real impact on the consumption.

As the chart 9 shows, the importance of the brand is quite noticeable because 70% of the respondents agree and the 4.1.3 section approves that it is an important motive in the buying decision process. And this is particularly the case for people who buy sportswear not to practice because they are 76%, against 65% for the one who practice with the products. A link can be made to the strong importance of design and style for casual use.

The last main point of the consumer behaviour is external stimuli. In other word, that deals with the environment and cultural aspect that can influence the consumption. And this can be considered as the main important factor according to Hawkins et al. (2003).
Regarding the women offer, it was important to know if people noticed an improvement and 77% of the respondents agree. Then, it is interesting to know who think that. Thus, the variable gender and the variable women offer were analysed. The result is both genders agree: 77% of women think there is a better offer for them and 81% of men. The difference can be explained by the fact that men look for them when they buy and not for women so they are less in contact with women offer or they can just feel less concerned and aware about the phenomenon.

Finally, in the frame of references part, it was noticed that there is a digitalization of the communication meanings. So, brands have developed some tools in order to offer a virtual experience to its potential customers, young people, who are particularly sensitive to this new ways of communication. Some different connected tools were settled as it was showed in the secondary data about the relationship between sportswear brands and consumers and the question is to know if it has an impact on consumption. Regarding the use of connected tools, there is apparently no link between the fact that people use sportswear only to practice, also use the connected tools of some brands. Thus, connected tools are not really used by both categories of consumers and no link can be deduced between the purchase and the use of these tools. It is even possible to consider that some people use connected tools for a brand without buying the products of this brand.

5.2. The buyer decision process

The second part of the main purpose is to determine the buying decision process of sportswear consumers following the theory. This part of the analysis is a transposition of the basic buying decision process in the sportswear industry. The whole empirical data section provides very useful information to observe and analyse this part of the consumer behaviour.

As seen in the theory section, the buying decision process is composed of five (Schiffman and Kanuk, 2000) or six (Engel et al., 1995) steps. First, the need recognition is known as the step where the consumer feels a need or a want (Kotler, 2008). The need recognition is highly influenced by what has been explained in the consumer behaviour analysis. The primary data collection shows two different types of consumers according to the use of sportswear products. The first 52% of the respondents use sportswear products to practice. The same way
sportsmen need adapted equipment for practice, they also need footwear, clothing and even accessories to make sports in good conditions. This point represents the first identified type of consumer according to the need recognition. Here, sportswear is required for some rational reasons like Engel had defined (1995). The rational need for sportswear product is actually the one that conducted firms such as Nike to create sportswear products in first place.

The other 48% of the respondents who said they do not buy sportswear to practice represents the second type of consumers. Indeed, they could be identified as what Engel called the “hedonic” consumers looking for aesthetics or pleasure (1995). If the practice of sports is not the first motive of buying sportswear products (supposed to be created for practicing), then the need recognition at this stage is far more complex. In the questionnaire, people being part of this tendency give various answers to explain the “need” of sportswear product they have. Here, style is the answer that came to mind most of the time.

Another empirical data is determinant to analyse the need recognition. 71.8 % of the respondents buy sportswear products because they had a crush on it. This crush can be determined at any time. Most of the time, the crush happens at the view of a product. In a society where the appearance is more than important, sportswear products provide a certain style that seems to be popular nowadays. Comfort also pushes people to consume sportswear products rather than other footwear or apparel. These two characteristics of sportswear products explain very well why people choose them. However, it is hard to use them to determine a need. They may want to buy sportswear products but at any time they have to. In this case, the need recognition step is blurry.

This need recognition phases is really important in the decision buying process because it will determine every single next step. Also, this step mainly illustrates the changing in the consumption behaviour that is to say, consuming sportswear product for another use than practising sports. With this data, it appears that the need recognition depends on two types of consumers, the rational driven consumer and the hedonic driven consumers. To go further there is a need to identify whether yes or no the need recognition will influence the searched characteristics. The more precise their need, the more efficient the information search (the next step). As previously observed, the criteria ranking is the same for sportsmen and non-sportsmen. The criteria ranking will permit consumers to precise their need before looking to any information on which product could fulfil this need.
The second step of the buying decision process analysis deals with the information search. As a reminder, the information search steps is defined as the time where the consumer will seek information about the different offers to help him make his choice (Kotler, 2008). It will be different depending on the level of involvement, which is directly linked to the need recognition (Engel et al., 1995).

The information search is mainly connected to the consumer behaviour theory. The internal and external stimuli identified by Kotler (2008) will highly affect the way information is search. First of all, external stimuli can make reference to the firms’ strategy. The importance of the brand analysed earlier shows how brands can stick to people’s memory and will hail when needed (Keller et al. 2008). In the sportswear industry, brands have a non-negligible role. They hold a clear positioning that automatically determines some characteristics of their products like if they provide products more adapted to professional athletes like Under Armour or to more various and large target such as Nike. When respondents were asked about the sportswear brands they know, their answers were a clue to evaluate the power of their strategy (chart 9). Thus, Nike, Adidas, Asics, Puma, Reebok New Balance and Le Coq Sportif, may be among the first brands that comes to mind to people when they search for information. Apparently, those brands must have an efficient communication strategy and benefit from a real popular reputation to the detriment of the others brands such as Lululemon Athletica or Under Armour. Brands can also mean a satisfaction or a dissatisfaction already experienced by the consumer. Here, the mentioned role of memory (Hoyer and McInnis, 2001) is justified. Communication campaign can create a need but they also can provide information for customers. It is interesting to pay attention to the impact of some communication means linked to the access to information they give (chart 12). Indeed, sportsmen are impacted by point of sales materials maybe because very specific performance products are often more explained in sports stores than on mass media. Also, sponsoring is important since in the consumers’ mind, professional sportsmen have good results thanks to their equipment. Sponsoring can be a token of quality or some features.

These communication tools are a huge source of information as well and will be reminded in the situation of needs. Furthermore, some aspects of the distribution strategy may be considered as sources of information. Indeed, retailers’ employees have a key role in the information search. Towards sportsmen, they can orient the consumers to some specificities
he/she needs according to the type of practice. But employees can also provides information for consumers who buy sportswear products that will not serve for practice. It could be about the latest Nike launch, it could be about the last collaboration between Adidas and Kanye West. The information search is thus a good indicator of the level of satisfaction and dissatisfaction but also to see if company’s communication strategies are effective.

The evaluation of the alternatives is the third step of the buying decision process (Engel, 1995; Kotler, 2008) but also the last step of the “process” stage (Schiffman and Kanuk, 2000).

Evaluating alternatives means for the consumer to keep in mind what he already thinks is going to match his expectations and to compare it to similar offer he did not think about at first (or he did not even heard about). According to the questionnaire two characteristics of the buying decision process must be points out as alternative identification. Under Armour and Lululemon Activewear are among the less quoted brand towards an European panel even though they are very popular across the Atlantic Ocean. In this example, someone looking for yoga pants, which is activewear, and only knows about Nike or Adidas should see everywhere else if another brand could propose a more adapted offer to his/her needs. Here the evaluation of alternatives will push this person to inquire towards Under Armour and his choice will or will not remains the same. Maybe Under Armour, which is specialised in the activewear, will correspond to what the consumer is looking for. One the other hand, maybe the lack of knowledge about this brand will make him/her keep the Nike or Adidas choice. Here again, brand positioning, brand power and firms’ communication strategy play a huge role in making products known as possible alternatives. Also, alternatives evaluation may concern the availability of products. If the looking product is not available, because it doesn’t exist anymore or because the size is out of stock, then consumers will have to find other means to fulfil their needs.

The second and last alternative issue regarding the sportswear industry in this questionnaire is about the women dedicated products’ offer. In history, sports have for a long time, been considered as an exclusive masculine activity (Horne, 2005), thus the offer were mainly considered men. Nowadays, in the (supposed to be) equal society between gender, women should be able to find an adapted offer to their taste, their preferences. The expansion of
feminine orientated products (Sherman, 2014) increased the opportunity of alternatives for women.

The purchase stage is the most observed part in this analysis section. The purchase stage defines the deliberation between the alternatives by the buying action (Kotler, 2008). There has been previously a settlement saying consumers in the sportswear industry do not only buy products for practicing but for different other reasons. These reasons were given in the need recognition stage and are the following: the comfort, the style or the history behind the products.

Along this buying decision process, similarities and differences have occurred between the two types of consumers. The purchase stage is not isolated from this phenomenon. Thus, the frequency of buying for both types can be interesting to compare. Also, the purchase will analyse the type of products that consumers prefers, the location where they are more willing to consume, the role brands play in the purchasing action, their usage of the connected devices or the availability of the offer. The purchase stage will embrace the main characteristics of the sportswear consumer whether he/she is a sportsman or not.

The first habit that needs to be observed is the purchase frequency. What could be interesting is to know if the purchase frequency is the same for sportsmen and non-sportsmen. At first sight, it seems like the two types of consumers do not purchase the same times. The biggest part of sportsmen (37 out of 77), assumes they buy sportswear product only once a year and 31 assumes they buy sportswear products only once a semester (chart 13). None of them has chosen the “every week” option. On the other side, the purchase frequency is higher for non-sportsmen: 70 of them buy sportswear products every month. This can be explained by the characteristics of chosen products for sportsmen that may allow them to keep them for month. The material chosen may lasts longer, the usage may preserve the good conditions of the products. However, non-sportsmen, as they use sportswear products for style, may choose products that are adapted to the current fashion. If fashion changes, than they need to buy an appropriate product.

Then, according to the respondents, footwear is the type of products that almost every sportswear consumers buy with 83.22% followed by apparel (57.05%). Sports footwear can actually be divided between two types corresponding to the two types of consumers.
Performance footwear represents a key element for sportsmen, first because they could increase performance or protect the feet during the effort. Every sport has its own adapted products. For non-sportsmen, footwear is also very popular because of the various reasons already listed above: opinion leaders wear them, fashion includes them in collections. Actually, sneakers addicts are good examples of footwear consumption for their own collection (Martin, 2004). When respondents were asked about the reasons why they do not consume sportswear apparel for other things than practice, they most of the time said the offer was not adapted to a casual style.

For some, it was not enough sophisticated, for others it was not enough feminine (again this though about a masculine offer exclusivity). Thus, sportswear apparel offer does not correspond to every type of consumers.

Regarding the location of the purchase, consumers trust the professionals. Indeed, 52.35% of the respondents chose retailers such as FootLocker or JD Sports to buy their sportswear products. The offer in these stores is more a lifestyle offer, since few of performance equipment is proposed there. Thus, people who chose retailers are more likely to be non-sportsmen consumers. Indeed, as the chart 14 shows, 57% for non-sportsmen against 48% for sportsmen buy their products there. 51% of the respondents assume they prefer sport stores like Intersport or Stadium. There, the offer is more focus on the practice of sports: they tried to offer every needed equipment for every sport. The Internet is the third choice of sportswear consumers (46.3%). This big proportion is explained by the expansion of the online offer. Consumers can thus buy sportswear products on the brand’s website like Nike.com or Adidas.com or they can buy what they need on retailers and sports stores’ websites. Internet has a lot of advantages for consumers. It is a time gain, the possibility to rapidly evaluate the alternatives and to have the possibility to order wherever there is an Internet connexion. However, online, consumers cannot try the shoes or the pants to know if it will fit. Also, despite websites provides various observations, consumers cannot ask a personal question to a salesman/woman. The service is reduced online. On the other hand, resellers’ trust is shy for the time being. This can be explained if the product has been wear before. Even though, most of the time, prices are more interesting for second hand products.

Generally speaking, respondents think sportswear products are easier to find nowadays (90.7%). Reasons to explain this availability are numerous. First, the offer is constantly growing. Almost twenty sneaker models are launched every week by brands (JD Sports)
which means every week, with this number, consumers have more chances to find what they are looking for. Then, as explained before, the expansion of the Internet has permit to liberate the offer, to make it more accessible to everyone everywhere. However, 16 people out of 149 assumes they have serious trouble findings what they want mainly because prices are too high for the offer and they refuse to pay for that. Clearly, the power of brands in sports apparel is really important and most of the time, consumers pay for the brand and not for the material. As seen previously, the purchase of some brands rather than some others will automatically confer to consumers a group belonging or a particular style.

The last point of the purchase behaviour study regards the available services by brands that are really recent and that gives a bit more to the offer. The importance here is to see if consumers are sensible to the firms’ services. The answer is not really. Only a quarter of the respondents use connected apps like the Nike Training Club. If consumers do not consider this service to be consume, then they are wrong. Despite they are no wearable, connected apps complete the equipment. The same comment can be applied to the personalisation option. 21.47% of people who answered the questionnaire have already use (at least once) the personalisation option. The originality is something that many of the respondents claims they want but only a few of them really seek to be original.

In most of the buying decision model, only five stages are known. However, Engel, defines another one that in this case can be very interesting, the consumption stage (1995). The consumption stage can be crucial since not every consumer uses the same product (Engel, 2005). Indeed, in this case, it is actually a key point since it has been noticed not everyone consume sportswear products the same way. Reasons why people consumer sportswear products for other activity than to practice have been explained. However, during the collection data, it appears that for sportsmen, sportswear products are not dedicated to perform a sportive activity. They do not know sportswear gathers every clothing and footwear dedicated to sports (Horne, 2005). For them, sportswear only concerns a non-sportive activity and are really not adapted for performance (lack of technology, too heavy, wrong materials). 52% of respondents affirms they buy sportswear products to practice sports, actually, the question was not “exclusively to practice”. Thus, among these 52%, some of them could surely use same products, or at least, same type of products for performance and for their daily lives.
The second point of this consumption stage is the frequency of usage. 65% of respondents wear sportswear products every day and another 20% wear sportswear products four, five or six times a week. These latest figures show this trend can be considered as not only an occasional change, because it occurs almost everyday. This frequency of usage proves this trend has to be taken seriously.

Finally, the last stage of this buying decision process is the post-purchase behaviour (Engel, 1995; Kotler, 2008). This final step will determine if the product has matched its promises and the consumers’ expectations (Engel, 1995; Kotler, 2008). If yes, then it is a satisfaction that can results on another purchase, if not, then it is dissatisfaction and the consumer has more chances not to buy it once more. Here, what will determine if the sportswear purchase is generally a satisfaction or not, is the emotion is provides to the buyer/consumer.

Results are balanced. For 53% of the respondents, the purchase of sportswear product does not make them feel a special emotion. For sportsmen, the special emotion might not exist since the product really correspond to a need, and if the consumer does no buy what he needs, he must just be able to practice sports. Feeling nothing means the consumer will not be necessarily loyal to the product or the brand. Thus, it is a weakness for sportswear companies in case they cannot create loyalty. However, 70% of the respondents assume they feel happiness after buying a sportswear product. 42% even feel excited which is an extreme feeling. Happiness and excitement will, in this case, most of the time conduct to another purchase for the same brand. This point is what sportswear firms need to aim.
6. Conclusion

6.1. Study purpose

Lately, a multiplication of fashion articles have mentioned the fact that the border between sportswear apparel and fashion was getting narrower. This changing could have an impact on the different protagonists in this sector: the consumers, the fashion industry, and the sportswear industry. However, no deep study has been done (since this one) to understand the insights of sportswear consumers and the difference between the classical and new ones. The purpose of this purpose was, indeed, to take a look at the new trend and to analyse it for the first time, but not only. The aim was also to compare this trend to the “traditional” consumption for sportswear products, that is to say, destined to practice. To do so, both types were interesting to focus on. Thus, this work provides an observation and an explanation of the consumer behaviour in the sportswear industry with a detailed and deep analysis of the consumers. Thanks to selected and relevant secondary data and a questionnaire that have been submitted to a hundred and forty-nine-people sample information were collected to get their motives, their influences, their actions and their feelings.

6.2. Outcomes of the analysis

To answer precisely the research question about the common points and the differences between the classical consumption behaviour and the new one that is not to practice sport, it can be said that even the final use is not the same, most of the motives and the influences remain the same between the two kinds of consumers. They rank the criteria in the same way: design and style is very important. They both agree that brand and its communication campaigns have a huge influence on them in their choice because they give them elements in the information search step.

The main difference is the need recognition step because the final use is completely different, if not totally opposite: one is to have a sporting activity, so it is needed material; the other is to wear casually in every day’s life, so, it is wanted clothes. The other difference is about the details of the purchase: the frequency is higher for non-sports men and the stores of the purchase are different because the offer is different inside.
The study enables to go deeper in the reflection. First of the outcomes is that women and young people appear to be like the new targeted customers identified by this study and some sportswear companies. Women have been taking into account by the sportswear industry in order to match to their new expectations. That takes part of the widespread wish to have a healthy life and they seem to be more and more satisfied.

Secondly, the analysis of the criteria suggests that sport use or non-sport use of theses products does not change the characteristics that are important for the purchase. This is good news for companies in the industry because that means they can stick to their main and first customers, who are active men and women, while diversifying their target. But actually, even if positioning of sportswear brands to stick to its first target, which is the athletes, the companies develop themselves a little in this way because they do not want to miss the opportunity. The efforts made by companies in the digitalization process do not seem to bear fruits right now. But it is probably because the timing is too short for the tools to spread and to know the real impact on the consumption.

Then, finally, the design and the style are real strong criteria that have seriously to be taken into account in the sportswear consumption. The importance of the appearance is a real characteristic of the Western societies and sportswear seem to the part of this process. Actually, the society is changing and so on with the perceived value of sportswear culture.

6.3. Limitations

First of the limit is that it was difficult to conclude thanks to the results of the questionnaire if this new trend is just as ephemeral as fashion or if it is a sustainable change. Indeed, more than 50% of the sample thinks that is not going to last. That leads to the question of the necessity for the sportswear companies to adapt in order to reach this new market.

The second limit identified is that the sample was large but not very representative of the whole population that is concerned. Indeed, if the study could have been done twice, the sample should be changed. The proportion of young adults was too important compared to the other. Many of the respondents were French, thus, the collected results are mainly concerning France. The sample was probably not diversified enough.
The third limit is that it was complicated to collect information about sneakers addicts, who represent a niche in this market. Indeed, a quantitative research was made and not a qualitative one. So, the collect of data did not go deep into this point, which is the involvement regarding the products that can be a real hobby. Because they are not especially identified, these people are not taken into account in this study while they represent a real part of the consumers in this industry.

6.4. Further studies

As mentioned earlier in the conclusion, this trend embraces different protagonists. The quantitative research is an efficient way to observe the population. However, firms in different industries can also be interesting. Thus, qualitative researches toward sportswear brands/firms can be relevant to have their opinion, their strategy, or their previsions about this new trend. Even thought, some clues already exist on their strategy (like the personalisation of NIKE), no direct research has been made already. According to firms, this study could have provided recommendations for companies. Despite the few points of convergence between the two types of consumers, some strategic points can be revised to adapt the offer, or the communication to this segment.

To go deeper into the consumer behaviour analysis, a qualitative research could have been made in parallel. For instance, a subgroup of the segments, the sneakers addicts, turns out to be key actors of this trend. They must have plenty of information to explain why they are so keen on buying sneakers not for practice.

Last but not least, the same study with a different sample, maybe with more different cultures and with more respondents from the several age categories, can reveal various relations to the trend according to the people’s cultures.
7. Appendix

7.1. Questionnaire

Here is the submitted questionnaire:

Développement et tendances de l'industrie du sportswear

*Compulsory

Quel est votre sexe? *
What is your gender?
- Homme / Male
- Femme / Female

Quel âge avez-vous? *
How old are you?
- < 18
- 18 - 30
- 31 - 45
- 46 - 60
- > 61

Avez-vous remarqué un changement de perception concernant les produits du street wear? Et de la basket?
* Have you noticed a change in people’s minds regarding street wear products and sneakers?
Quand avez-vous remarqué cet éventuel changement? *
When did you notice it?
- > 10 ans/years
- 5 - 10 ans/years
- < 5 ans/years
- Un dernier / Last year

Avez-vous une idée de ce qui l'influence? *
According to you, where does the change come from?
- Leaders d'opinion / Opinion leaders
- Mode / Fashion
- Marques de sportswear / Sportswear brands
- Internet & réseaux sociaux / Internet & social media
- Société / Society
- Autre :

Pensez-vous qu'il s'agisse d'un phénomène de mode qui va s'affaiblir d'ici quelques années? *
Do you think this is only a trend which tends to disappear?
- Oui / Yes
- Non / No

Qui sont les nouveaux consommateurs? *
Who are the new customers?
- Enfants / Children
- Jeunes & jeunes actifs / Teenagers & Young active people
- Adultes Actifs / Active Adults
- Retraités / Retired people

Faites-vous part de cette nouvelle tendance? *
Do you personally follow this trend?
- Oui / Yes
- Non / No

Pourquoi? Qu'est ce qui vous plaît ou vous déplait?
Why? What do you like or dislike about it?
À quelle fréquence achetez-vous du sportswear?

- 1 fois par an / Once a year
- 1 fois par trimestre / Once a semester
- 1 fois par mois / Once a month
- 2 fois par mois / Twice a month
- Toutes les semaines / Every week

Combien de fois par semaine portez-vous des produits sportswear?

- Tous les jours / Every day
- Entre 4 et 6 fois / Between 4 and 5 times
- Entre 3 et 2 fois / Between 3 and 2 times
- Juste une seule fois / Only once

Quel type de produits sportswear achetez-vous?

- Chaussures / Footwear
- Vêtements / Apparel
- Accessoires / Accessories

Quels sont vos critères en matière de sélection? 1 étant le critère le moins recherché, 5 étant le plus.

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Utilisez-vous ces produits pour une activité sportive?

- Oui / Yes
- Non / No

Pourquoi?

Why?

Trouvez-vous toujours ce qu'il vous faut?

- Jamais / Never
- De temps en temps / Sometimes
- Souvent / Often
- Toujours / Always

Avez-vous remarqué une amélioration dans l'offre dédiée aux femmes?

- Oui / Yes
- Non / No

Où achetez-vous ces produits?

- Magasins de sport / Sport stores (So sport, Decathlon, ...)
- Magasins spécialisés / Retailers (Foot Locker, JD sports, ...)
- Internet / The Internet
- Revendeurs / Resellers
- Autre / Other

Pensez-vous qu'il est plus simple de les trouver de nos jours?

- Oui / Yes
- Non / No
Pourquoi? *
Why?
- Trop de demande / Too much demand
- Trop cher / Too expensive
- Trop d'éditions limitées / Too many limited editions
- Autre ;

La marque est-elle importante pour vous? *
Does the brand matter to you?
- Oui / Yes
- Non / No

Pourquoi? *
Why?
- Effet de mode / Fashion trends
- Style / Style
- Collaborations / Collaborations with opinion leaders
- Valeurs / Values
- Autre ;
Que représente la marque pour vous? *
What does the brand represent for you?
- Qualité / Quality
- Un certain style / A particular style and design
- Engagements éthiques et environnementaux / Ethic and environmental involvements
- Communauté / Brand community
- Certains leaders d'opinion / Reference to opinion leaders

Quelles marques de sportswear connaissez-vous? *
Which sportswear brands do you know?
- Nike
- Adidas
- Lacoste
- Under Armour
- Lululemon Activewear
- Reebok
- Puma
- Saucony
- New Balance
- Asics
- Majestic
- Le Coq Sportif

Pensez-vous que la communication des différentes marques de sportswear ont de l'influence sur vous? *
Do you think that communication of some sportswear brand influence you?
- Oui / Yes
- Non / No

Quel moyen de communication utilisé par les marques a le plus d'effet sur vous? *
What communication tool used by firms has the biggest impact on you?
- Publicités télévisées / TV Commercials
- Affichage / Billboards
- Radio / Radio
- Point of sale materials
- Bouché à oreille / Word of mouth
- Sponsoring
- Événements / Events

Utilisez-vous les accessoires connectés des marques de sport comme l'application Running+ de Nike? *
Do you use digital tools of sportswear brand such as Running+ App from Nike?
- Oui / Yes
- Non / No

Avez-vous déjà utilisé les services de personnalisation de produits (type Nike ID)? *
Have you ever used personalization services such as Nike ID?
- Oui / Yes
- Non / No

Achetez-vous en connaissance ou juste au coup de cœur? *
Do you buy it as an expert in the field or just because you had a crush on it?
- Connaisseur / Connoisseur
- Coup de cœur / Crush

Qu'est ce que l'achat de sportswear produit chez vous? *
How do you feel when you buy sportswear products?
- Joie / Happiness
- Excitation / Excitement
- Jalousie / Envy
- RIen / Nothing
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