



Themed flagship brand stores in the new millennium: theory, practice, prospects☆

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Abstract

The flagship brand store is an increasingly popular venue used by marketers to build relationships with consumers. As we move further into an experience economy in the new millennium, retailers are refining the flagship brand store into new forms such as the themed retail brand store. This new form not only promotes a more engaging experience of the brand's essence but also satisfies consumers looking for entertainment alongside their shopping. In this article, we conceptualize and explore themed flagship brand stores in terms of the mythological appeal of the narratives conveyed by their physical and symbolic structure. We utilize a field study of ESPN Zone Chicago to examine these features in a sports-themed retail brand store. Finally, we offer some projections, based on our research, of the possible transformations of the flagship brand store as the new century unfolds. We conclude that mindscape-related themes, which combine entertainment, therapeutics, and spiritual growth, are at the frontier of retail theming. © 2002 by New York University. All rights reserved.

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Introduction

Retail markets are more diverse and fragmented than ever before, presenting consumers with an overload of information and alternatives. To attract these consumers, retailers have increasingly turned to retail atmospherics to create a more memorable and attractive consumer experience (Gottdeiner, 1997; Kotler, 1974; Martineau, 1958; Pine & Gilmore, 1999; Wolf, 1999). Entertainment consultant Wolf (1999) asserts that, as entertainment has seeped into every aspect of the economy, shopping has become blended into entertainment, becoming what he terms “shopertainment.” This seemingly futuristic trend is actually a recent reappearance of an ancient imperative. Anthropolo-

gists tell us that the origins of the commercial marketplace are in festival marketplaces, places that have traditionally existed on the borders of cities, where celebrations, exotic peoples, mysteries, and tricksters presided (e.g., Lears, 1994; Sherry, 1995). In order to realize the present-day incarnation of this enterprise, in which stores tell stories, retail marketers have had to pay ever more detailed attention to esthetics and to the processes by which consumers make meaning out of their physical experience of place.

The themed flagship brand store phenomenon may be at the cutting edge of this trend. The primary intentions of most flagship brand store designers are to take the branding concept to an extreme level. We identify several types of brand-related stores. *Flagship brand stores* can be distinguished by three characteristics. First, they carry a single (usually established) brand of product. Second, that brand's manufacturer owns them. Finally, they are operated—at least in part—with the intention of building or reinforcing the image of the brand rather than operating to sell product at a profit. Flagship brand stores can be *exclusive* outlets for a manufacturer's brand, such as Old Navy, Banana Republic, or Body Shop, or *nonexclusive*, such as Tommy Hilfiger or Ralph Lauren. Other examples of nonexclusive flagship

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brand stores used for brand building purposes include Nike Town, the Everything Coca Cola Store, the Lego Imagination Center, and the Sony Gallery of Consumer Electronics.

Another brand store is the *themed entertainment brand store*. Themed entertainment brand stores are focused primarily on selling branded services rather than selling branded products, and tend to have no brand history outside of the particular themed brand store outlet. However, themed entertainment brand stores, like flagship brand stores, seek to build their brand and merchandise it. Examples of themed entertainment brand stores include Planet Hollywood, The Hard Rock Café, Rainforest Café, Steven Spielberg's Dive! restaurants, and the Fashion Café.

Finally, we identify and focus on an interesting hybrid, the *themed flagship brand store*. In the themed flagship brand store, an established brand itself becomes the basis for a retail approach in which new, entertainment-oriented services are offered. The themed flagship brand store combines elements of flagship brand stores and themed entertainment brand stores because it promotes an existing brand that is sold in a variety of other venues and also seeks to become an entertainment destination that generates revenue directly from the sales of entertainment services. For example, the World of Coca Cola Museum in Atlanta is a themed attraction that charges admission to a theme park-like interactive museum celebrating Coca Cola. It also is an elaborate brand building exercise that features themes of nostalgia, American history, Santa Claus, and globalization. ESPN Zone, a themed flagship brand store that promotes a successful pre-existing television network franchise, is another example.

Themed flagship brand stores instill vigor in, and tangibility to, brands. Exploiting the same drive for synergies that have driven media mergers and conglomeration, they provide a place for retailers to leverage and broaden the impact of other media-related events to the brand, such as advertising, sponsorship, promotions, and publicity (Aaker & Joachimsthaler, 2000). Consumers go to themed flagship brand stores not only to purchase products; they go to *experience* the brand, company, and products in an environment largely controlled by the manufacturer.

As Gottdiener (1997), Wolf (1999), and Schmitt (1999) have noted, the experiential, grandiose, spectacular and entertaining aspect of retailing is becoming increasingly important to contemporary stores (see also Agins & Ball, 2001; Ginsburg & Morris, 1999; Riewoldt, 2000). As commodities become increasingly associated with fantasy-oriented lifestyle advertising, their associated brands are transformed into popular cultural images and icons. Fantasy associations also change the practical functionality of marketplaces into a more escapist orientation that has been associated with servicescapes (Sherry, 1998a). Servicescapes have been defined as constructed physical surroundings intended as sites in which commercial exchanges are to take place (Bitner, 1991). In a social environment charged by entertainment and fantasy, it is little wonder that some producers turn to themed flagship brand stores as an em-

bodied form of retail advertising. They are following the lead of pioneering "imagineers" such as Walt Disney, who recognized almost a half century ago that entertainment spaces such as amusement parks could be used not only to sell popcorn and candy floss but toys, collectibles, and motion pictures, as well as—and, we would argue, most importantly—a corporate brand image. As more retailing takes place in spaces geared for amusement, our consumer culture seems more and more like a "Hollywood Planet" (Olson, 1999) under the influence of an "economy of icons" (Sternberg, 1999).

Among the most important of these icons are brands. Consumers' perceptions of social "reality" are strongly conditioned by the brands in their environment. Brands are arguably the pre-eminent symbols used in contemporary consumer culture, as many consumer anthropologists have maintained for decades (e.g., Appadurai, 1990; Coombe, 1997; Douglas & Isherwood, 1979; McCracken, 1997; Sahlin, 1976; Sherry, 1985, 1995). Brands are an important part of the vocabulary of consumer behavior. As sold through advertising, product placement, merchandising, artistic representation, word of mouth, and everyday life, brands are woven into the fabric of consumers' cultural universe. Increasingly, individual brands are enshrined in environments built especially for them. They have moved beyond conventional retail outlets to take up residence in flagship brand stores. This devotion of exclusive space to brands is an important retail phenomenon.

We aver that its tangible, spatial aspect will continue to be incredibly important to retailing. Unlike many new economy prophets who view physical assets as "dead weight" (e.g., Gerbert, Schneider, & Birch, 1999), we see brick-and-click hybrids as the retail model of the future. As what *BusinessWeek* terms "extreme retailing" (Ginsburg & Morris, 1999) becomes more commonplace, themed flagship brand stores—not dot coms—will develop the most successful experiments blending virtual and real worlds. Virtual commerce will enhance the place-based appeal of stores that display, divert, delight, and deify through the use of retail theater. Blending fantasy with reality will increasingly occur as retailers recognize that branding is a magical affair in which fact and dream must merge together.

Because of the important role of fantasy elements in constructing contemporary retail environments, we employ and extend a framework that classifies, organizes, and analyzes the cultural associations behind the types of fantasy elements that may be used. This framework is the four servicescapes typology delineated by Sherry (1998a, p. 337–341; see Fig. 1), an expansion of Bitner's (1991) servicescapes conceptualization. Four types of retail themes are suggested by the servicescapes classification of marketplaces, and two dimensions define these types of retail themes. As represented by the horizontal axis in Fig. 1, the first dimension portrays the apparent malleability or tractability of the retail theme and ranges from "natural" or primordial to "cultural" or humanly designed and built. The

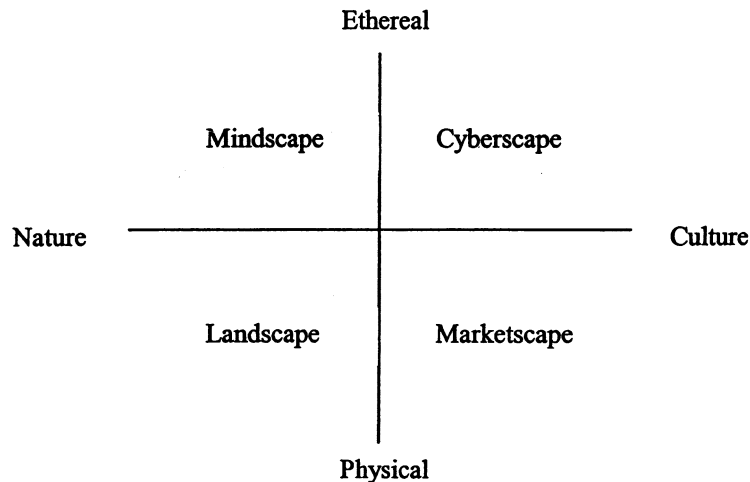


Fig. 1.

second dimension portrays the tangible or material quality of the retail theme, represented in Fig. 1 by the vertical axis, and ranges from “physical” or tangible to “ethereal,” non-physical or ideational. The intersection of these two axes produces four types of retail themes, which we conceptualize in this article as presenting particular guiding themes or formats that may be used in themed flagship brand store planning and development.

These themes are exclusive categories relating to elements within a particular themed retail environment. Retail environments, in practice, are extremely complex. Multiple types of themes may therefore be practically employed in overlapping fashion in the same retail themed environment. In this article’s centerpiece investigation, all four of the themes suggested in this typology overlap. General descriptions of the four retail themes described in Fig. 1 follow. First are landscape themes, which employ associations to, and images of, nature, Earth, animals, and the physical body. An example would be Bass Pro Shops, with its simulation of an outdoor environment, even containing a pool stocked with fish. Second are marketscape themes, which employ associations and images of different cultures, man-made places, and buildings. An example would be The Venetian hotel in Las Vegas, Nevada. Third are cyberscape themes, which employ associations and images relating to information and communications technology, and often to virtual community. An example would be eBay’s retail interface, with its use of technology applied to provide a sense of a unique community or retail culture. Fourth are mindscape themes, which draw on abstract ideas and concepts, introspection and fantasy, and which are often spiritual or ritualistic in their inclination. An example would be the Kiva day spa in downtown Chicago, which offers health treatments based on a theme of Native American healing ceremonies and religious practices. Later in this article we will use and extend this servicescape framework to categorize some logical types of themed flagship brand stores in

order to predict which industries and product categories will be most likely to successfully employ them.

Our discussion first focuses on a sports-oriented themed flagship brand store because it offers one of the most compelling examples of an intersection of these four types of retail themes. Sports relate to a natural, biologically basic pursuit of physical exertion and competition, yet in their contemporary form they are highly structured by norms, rules, and values. In terms of their on-screen influence, consider that sports provide “the number one content on the Internet and TV,” with 100 million fans about to come online as television and Web are said to converge (Feather, 1999, pp. 153–154). Twelve million consumers around the planet spend almost \$600 million each year on sports fantasy leagues (Feather, 1999). Increasingly realistic simulations of sports-oriented themes are speeding the convergence of land-, market-, cyber-, and mindscapes. Investigating a sports-oriented themed flagship brand store can therefore potentially inform our theorizing about multiple aspects of retail theming.

How would a retailer attempt to build a flagship brand store around one of the most intangible, diffuse, and competitive “brands” of all: that of a cable television network? By studying the example of ESPN Zone Chicago, we can gain important insights that transfer to themed flagship brand stores of all varieties. The authors are engaged in a long-term ethnographic field study of this particular site and are currently collecting comparative data from other themed retail venues as well. The present essay draws on the first year of this ongoing field research at ESPN Zone Chicago, which involved interviewing managers, workers, and several dozen customers as well as observing and participating in ESPN Zone activities. Interviews and observations were recorded in fieldnotes, taped recordings, and still photographs that were later transcribed, coded, and analyzed in group meetings that examined the data for integrative themes. In the next section, we use ESPN Zone Chicago as

an illustrative example. We then return to the servicescapes framework to analyze and project the future of flagship brand stores in these opening decades of the twenty-first century. The concluding section of the article provides the implications of these findings for the present direction of retailing.

Retail theater and flagship branding in contemporary marketplaces

In response to consumers' clamoring for increasingly more entertaining and even sublime shopping experiences, manufacturers and retailers attempt to facilitate the "buying of experiences" (Pine & Gilmore, 1999). Through the use of lavish decor, sleek finishes, and attention to the smallest of details, consumers are presented with a stage behind the storefront. Interactive displays and other engaging edifices evoke emotions and other sensations that make an experience unique and individual. For the retailer, successful brand building comes in the form of consumer experiences that entice, entrance, and enrapture. The richness of themed physical environs, both outdoor and indoor, such as those created for the Hard Rock or Rainforest cafés, is intended to attract customers and cause them to linger longer.

The notion of retail experience as a theater of sorts has been discussed within the marketing and trade literature (e.g., Peñaloza, 1999; Pine & Gilmore, 1999; Sherry, 1998b; Solomon, 1983; Wolf, 1999), yet there remains much room for further theoretical development. As manifest in the world of retailing, the experiential dimensions of retail theater are complex, differentiated, and in constant flux. Retailing has become increasingly both staged (by performing salespeople, as it is at Ed Debevic's diners in Los Angeles and Chicago) and a stage (such as at Nike Town's basketball court, which invites consumers to perform for one another). Through these staged experiences, consumers draw brands and products into their fantasies. By playing on this playfulness in new ways, information technology allows an entrée into the fantasy life of the consumer, entailing a sophisticated use of meaningful symbols. In the following section we explore some of the prevalent symbols that combine universal and local meanings (termed "mythotypes" by Olson, 1999) employed in ESPN Zone's themed flagship retail environment.

Illustration: mythotypes at ESPN Zone

In the marketplace of the contemporary United States, we are accustomed to the intertwined mythic stature of celebrity and brands (Levy, 1999; Randazzo, 1993). According to Olson's (1999) theory, we can understand this admixture of celebrity and brand by understanding the narrative role of what he terms a "mythotype." Olson describes a mythotype as a symbol that is: (1) locally meaningful to a particular audience, and (2) expresses a universal emotional

state or combination of states such as awe, wonder, purpose, joy, and participation (pp. 91–93). For example, in Chicago, Michael Jordan instantly expresses a range of emotions involving heroism, athletic excellence, a Horatio Algeresque success story, and hometown pride. In a retail setting, mythotypes serve to symbolically enrich particular retail locations.

According to Olson (1999), although the particular form of a mythotype changes by location in space and time, the narrative structure of successful mythotypes can be understood by studying ten characteristics that they possess. These ten characteristics of successful mythotypes are listed and parenthetically defined as follows: (1) openendedness (a narrative that provides a lack of closure, thereby inviting further consumer development and interpretation); (2) verisimilitude (a narrative with a sense of naturalness and truthness); (3) virtuality (a narrative involving technological sophistication and the potential for electronic mediation); (4) negentropy (a narrative that has the ability to order and direct consciousness); (5) circularity (a narrative that demonstrates the return to a starting point); (6) ellipticality (a narrative that omits some detail, thereby providing mystery); (7) archetypal *dramatis personae* (a narrative containing characters that manifest universal emotions and states); (8) inclusion (a narrative providing the feeling that the consumer is included in it and its values); (9) omnipresence (a pervasive or widely distributed narrative); and (10) production values (a narrative containing grand style, bombast or spectacle). Insofar as the narrative surrounding a brand can contain these ten characteristics (an ideal approached by brand superstars such as Disney and Nike), it may enjoy transcultural appeal in multiple locations (Olson, 1999, pp. 93–113). In this section we first overview and contrast the managerial intent and consumer perceptions of ESPN Zone, and then proceed to analyze its retail environment according to these ten characteristics.

An introduction to ESPN Zone Chicago

ESPN Zone Chicago is a flagship brand store for the ESPN sports network, which is owned by the Disney Company. It is a 35,000 square-foot retail establishment located just outside of downtown Chicago's "Magnificent Mile" district. ESPN Zone contains a restaurant, a sports bar, and a massive, state-of-the-art, virtual reality-style, sport-themed videogame arcade. Taking high tech to the nth degree, it boasts 165 video monitors. It also contains 21 original, commissioned, sports-and-Chicago themed artworks. The general manager of ESPN Zone describes it as "a 3-D ESPN," making clear that the retail location was intended as a physical manifestation of the television network. He also emphasizes the role of "Disney pixie dust," an allusion to Tinkerbell's magic, in the success of the illusion. He also makes clear verbally, and through promotional materials such as press kits, that it is intended to be an extraordinary experience, a "sports-and-dining entertain-

ment complex” unlike more ordinary theme restaurants and sports bars. Our data and analysis indicated that Disney managers intended ESPN Zone to be seen by consumers as a type of retail theme park in which the experiences of the television network would be physically manifested and intensified.

When we asked customers for their opinions of ESPN Zone, however, we found a much greater diversity of impressions. The following quotations from our customer interviews reflect some of this diversity:

Informant: I watch ESPN all the time, so I guess that’s what’s drawn me here. Then there are all the activities and the games. It’s kind of like an amusement kind of thing for older people. So I guess that’s what keeps drawing everybody back. It’s sort of like a Chuck E. Cheese kind of place, you know? (Male, early thirties, repeat customer)

Interviewer: what’s your impression of this place?

Informant: Compared to other theme restaurants, this one is pretty good. Compared to Hard Rock or Planet Hollywood, this one is pretty good. I like it. I mean there’s a lot of stuff to look at.

Interviewer: what does it remind you of?

Informant: I don’t know. An arcade? . . . Basically, it’s just a good place to eat. For people from out of town. (Female, late 20s, first time at ESPN Zone)

Informant: It’s like a movie theater, but it’s with sports. It’s actually, like, interesting. It’s got all your highlights. It’s like having thirty TVs in one room. And it’s like amazing. [It’s like] A movie theater. Or like thirty TVs. Two things. ‘Cuz it’s got a big screen and all the little screens.

Interviewer: so what does that do for you?

Informant: It makes me like, really want to come here more. It’s like a fun place to be. Because you can see every single sport. You can watch like tennis one second, and the next you can be watching a golf tournament or basketball, or anything like that. And they even have like private rooms if you want to be quiet and you want to be with friends. It really intrigues me.

Interviewer: what about it intrigues you?

Informant: The whole thing with the chairs. Everything about it is so new, and high-tech. And everything is so much better than you can get at your home. You can’t have anything this high quality at home, except for maybe like the Cokes. Other than that everything’s very high quality. (Male, teen, first time at ESPN Zone)

Unlike ESPN Zone’s managers, who intended the retail space in its totality to be seen as a unique attraction like a theme park, these customers’ impressions connected specific aspects of the space (such as the restaurant, the videogame arcade, and the television screens) to other established environments they had encountered in their lives. In the

above quotations we see ESPN Zone being experienced similarly to children’s theme restaurant Chuck E. Cheese, to other theme restaurants such as the Hard Rock Café and Planet Hollywood, to pinball and videogame arcades, to movie theaters, and to a higher quality and high tech version of one informant’s own home. Many other informants compared the retail space to a sports bar or a sports museum. While some of the qualities of an amusement park were implicit in some of the conceptions, such as Chuck E. Cheese and arcade, none of our informants mentioned the connection to Disney. Expressing an economic motive related to the lack of a cover charge fee, one middle-aged, non American tourist said, “I went to Disney Quest [two doors down from ESPN Zone]. But it costs thirty-two bucks to get in. So I come here instead.”

Yet customers also describe ESPN Zone as a fulfilling “fantasy” exaggeration. For example, one customer stated that the place is not simply a sports bar with a giant screen, but the idealized version of what a perfect viewing experience might be like. Associating the ESPN brand with such a perfect viewing experience may well enhance the appeal of the brand. Many customers (particularly males) also state that ESPN Zone is a manifestation of the sports network, containing its attitude and ethos. This finding suggests that the designers have done well in realizing the goal of connecting the establishment with the brand. However, the frequent comparisons to other theme restaurants such as Planet Hollywood suggest that breaking out of consumers’ preordained categories might be difficult. Our research interpretations reinforce these findings by noting how the irreverent, originally quite local and populist coverage of ESPN is realized through the interactive and open-ended displays at ESPN Zone (such as the ability of diners to sit behind a facsimile of the Sports Desk, or to have a beer while watching a broadcast from the glass-walled radio booth). Our analysis also transcends consumer (and perhaps producer) perceptions of the mythic qualities of ESPN Zone’s space, delving into the spiritual underpinnings of the place in a way that consumers may not appreciate.

To further develop an understanding of these mythic qualities, we now proceed to employ the mythotype characteristics of Olson (1999). Consumer interpretations and our own interpretations of ESPN Zone Chicago leave little doubt that, in a themed retail store such as this one, consumers “read” their physical environment for the story that it tells them. Analyzing architectural structure as a type of narrative structure has a long history (e.g., Crawford, 1992; Fjellman, 1992; Sherry, 1998b), and in this study it allows us to understand how ESPN Zone Chicago successfully exhibits a narrative structure that combines local meaning with universal appeal in a themed retail environment. The ten sections that follow classify and explain characteristics of ESPN Zone’s narrative structure—that is, the story that this place tells its customers—and relates them to the characteristics of successful mythotypes.

Openendedness

Openendedness is a narrative structure realized at ESPN Zone Chicago by structures that invite further consumer development and interpretation in order to make them complete. Built around ideals of play that encourage a diverse range of spectator and participative acts, ESPN Zone Chicago's openendedness is encouraged by providing an accessible yet highly complex retail experience consisting of themed games, artwork, technology, and displays. While traditional flagship stores focus on display, sales, and variety, retail theater is architecturally crafted into ESPN Zone by providing multiple "zones" of experience. For example, within the single "zone" of the sports bar-like "Screening Room" is contained a restaurant with many small monitors (an area often populated by families), a bar (an area often populated by singles and groups of males), two separate "Skyboxes" (VIP areas enclosed in glass often rented to corporations and priced on a per-hour basis), and a "Throne Zone." The latter contains huge comfortable leather recliners with remote control buttons to control individualized sounds placed in front of fourteen massive video monitors and is often populated by hardcore sports fans. Because of the seemingly spontaneous nature of consumer-brand interaction in these zones, meaning and experience potentially seem less scripted, more symbolic, and more personally relevant to consumers.

Verisimilitude

Verisimilitude is a narrative characteristic of ESPN Zone Chicago presented when the physical structure conveys a sense of naturalness and truth to its customers. At ESPN Zone, references to, accurate depictions of, and obsessions over sports history form much of the "truth" found in ESPN Zone's memorabilia, art, and language. Its simulations of actual broadcast settings also relate to a reconstruction of truth. For instance, its "Studio Grill" restaurant is intended to resemble the actual soundstage used to broadcast popular ESPN shows, such as Sports Desk. The working radio studio that operates in the Screening Room, sometimes featuring what the general manager terms "talent," or celebrity guests, invokes a sense of ESPN Zone as a broadcast-related reality. Finally, ESPN's symbolism celebrates the "real" primitive and natural in sports and humanity, featuring fire-centered imagery and multiple depictions of muscled human bodies in mock mortal conflict.

Virtuality

Narratives of virtuality are present in ESPN Zone Chicago's narrative in the many presentations of products and services that are electronic and computerized. This electronic mediation and technological sophistication are used to impress customers as well as to fulfill some of their more technophilic needs. Retail theater in the Internet age increasingly blends technologies with fantasy. At ESPN Zone technology is ever-present as the fulfiller of fantasy, such as the gigantic, high-quality and ever-present television

screens, or the ultradeluxe remote control reclining chairs, or the satellite dishes prominently displayed on the building's exterior. Virtuality is taken to extremes in the massive video arcade "Sports Arena" filled with virtual games like car, boat, and motorcycle racing that can be played independently or competitively. There are also real-virtual hybrids such as games that require shooting a real soccer ball against a virtual goaltender (accompanied by the virtual cheer of a home team crowd), or skydiving wearing a pair of virtual goggles. While providing an adrenaline-pumping speed rush, virtually crashing a car, whipping a horse, and zooming through snow all have distinct advantages over their more physical analogs. As the cutting edge experiences offered by a technology- and entertainment-focused society, they also provide consumers with novelty and prestige.

Negentropy

Negentropy is the imposition of a sense of narrative order that an establishment such as ESPN Zone can structure on the consciousness of those within it. Employing common cultural categories (such as themes of liberation or nostalgia), consumers' travel through symbolic spaces can be directed in the same way that a director leads an audience. At ESPN Zone, consciousness is directed through an orchestration of unified images—sights, sounds, screens, and art—that evoke the centrality and importance of sports in cultural and individual life. Constantly reinforcing the value and values of sports, the Zone also simultaneously provides for the material fulfillment of aroused urges, offering multiple ways to spend money on sports-related services and merchandise.

Circularity

The architecture of ESPN Zone literally demonstrates the narrative device of circularity, an ever-present return to a starting point, which has important mystical and natural connotations. The building is constructed around a circular theme, such that the gently curving lines on the periphery always return to their originating point. At the center of the circle is the "production booth" in which the programmer sits, surrounded by monitors, deciding which sports events (and, occasionally, other programs, such as soap operas) will be broadcast on the dozens of embedded screens. With a curved sky-painted dome, a stratospheric cathedral ceiling reminiscent of natural and spiritual realms, a circular staircase, and a circular logo-embedded rotunda, the circle is multiply present within ESPN Zone. The symbolic message it conveys is one of eternity, completion, infinity—a simultaneous striving and grasping that sports and all of achievement-oriented human activity conveys. By imbuing architecture with these universal emotions, and linking it intelligently with marketing strategy, ESPN Zone typifies how a built environment can use the concept of circularity to animate its mass-mediated brand on a physical level. For other examples of the use of architecture in marketing, see

Baker, Grewal, & Levy (1992), Brooks (2000), Holbrook (1980), Johnson (1987) and Sherry (1998a, 1998b).

Ellipticality

While circularity provides a common orienting theme to the building's narrative, ellipticality leaves out particular elements, omitting details in the service of providing the retail customer with the experience of "aporia" or gaps in meaning that call out to the reader or audience to fill them. Mahler (2000) predicts that consumers in the near future will be overwhelmed with joy at their ability to take shopping experiences and customize them. The ability to customize requires that producers leave their products somewhat incomplete. Because researchers are beginning to recognize the reciprocal nature of all meaning creation, the act of productive-consumption means that consumers can have a stake in building brand image (extending, applying, or improvising may be even more appropriate descriptions of this act). At ESPN Zone Chicago, we interviewed customers who found that the retail environment provoked feelings of nostalgia for a return to their childhood, comparable to a Chuck E. Cheese's for adults. Other customers compared it to a movie theater, or a specialized gallery for local, sports-inspired art. The complexity of the built environment invites this diversity of engagement and interpretation.

Dramatis personae

Dramatis personae are evident in physical structures as the people who animate a physical environment with their larger-than-life, mythically resonant presence. One of these is the role of the generalized others who constitute an audience. Without an audience to watch you skydive in virtual reality, without someone to compete against in a video racing game, without a crowd of similarly polarized fans to root with (or against) your team on the big screen, the consumption of sports is incomplete. Yet a community of fellow sports consumers is only part of the cast for ESPN Zone's production, for the key *dramatis personae* are the archetypes of sports. At ESPN Zone Chicago, multiple displays celebrate and elevate the stars of local sports.

There are vast displays dedicated to Michael Jordan and his mastery. Skybox rooms center on images of Sammy Sosa and Ernie Banks almost as if they were religious devotional booths. The Bristol Room restaurant contains a massive mural painting that chronologically depicts Chicago sports celebrities from the turn of the century to the late 1990s. Portraying this modern pantheon in an almost fresco style, its elevation of sports celebrity links historical pride to urban relevance and loyalty. There are also the dramatic workers employed by ESPN Zone, whose behaviors are scripted and trained by Disney. These players wear a variety of different costumes, from the white, quasi-formal garb of the restaurant staff, to the blue coaches' uniforms of the arcade minders. Each plays different roles and aims to evoke different types of emotional response. All of the

players in the complex exemplify and realize universal emotional states related to community, service, and achievement. From a practical perspective, each player also requires careful training and supervision.

Inclusion

Customers also need to feel included in the story that they feel a themed environment is trying to tell them. This sense of inclusion, and the consumer empathy that accompanies it, is vital to the elicitation of customers' emotions. Often in a contemporary context this will mean providing legitimizing references to supporting local community or broader social justice or equality issues (Arnold, Kozinets, & Handelman, 2001). At ESPN Zone, inclusiveness manifests in the appearance of a behind-the-scenes look at the magic of ESPN's "TVland." With almost 60% of the average American's waking time spent interacting with mass media of one sort or another (Wolf, 1999), it is not surprising that many American consumers are curious about the processes that produce modern mass media. Sating this curiosity with behind-the-scenes peeks is a technique that is well honed in theme parks such as Disneyland. Inclusiveness also manifests at ESPN Zone by providing customers with a stage on which they can perform. For example, in the virtual reality sky-diving simulation, a customer stands on an elevated stage wearing virtual reality goggles while a crowd of onlookers forms and watches his or her virtual experience on a central monitor. Inclusiveness can also be manifest in the egalitarian ethos implicit in the ESPN Zone policy that encourages play between what Disney/ESPN management terms "cast members" (workers) and "guests" (customers). Given that many of the servers in the Sports Arena area at the Chicago location are African American, and many of the served are white, this inclusiveness might also have racial overtones that hint at more egalitarian possibilities (racial-equalizing properties similar to those often ascribed to sports as an institution).

Omnipresence

Omnipresence can be elicited in a themed retail environment by associating elements of the space to images or ideas that are, at that time, socially ubiquitous. Sports, celebrity, and television screens are currently omnipresent in modern America and are equally omnipresent at ESPN Zone. This constant presence hypes consumers into sports-mode, appealing to them from almost every cultural consumption angle, from passive couch potato enjoyment, to active hoop-shooting simulation, to intellectualizing artistic esthetics, to feeding dreams of sports stardom. Tying into something omnipresent seems essential to themed flagship brand store success. The linkage to the omnipresent also implies moving to higher and higher levels of abstraction while still not losing focus on the tactical dimensions of one's core business. At ESPN Zone, abstract notions of the primal, competition, fitness, the body, and success blend and interweave with a variety of business practices such as offering pre-

mium priced videogame services, food, drink, and sports memorabilia.

Production values

Providing the quality production values of a well-crafted spectacle is also essential to arousing the emotions of experiential customers. Knowing that the show is better if the puppet strings are invisible draws producers into aiming for a seamlessly produced and executed themed flagship brand store experience. The encounter-centered and immersive reality of the brand store relies on ever-more-grandiose elements. On a larger scale, the trend towards theming has permeated and influenced many retail efforts. The trend is obvious at the meticulously produced and executed ESPN Zone and is also widely evident in Las Vegas, where strip casinos are founded almost exclusively on fantastic concepts of themed retail.

Some scholars have argued that these theming efforts have important social costs. Gottdiener (1997) argues that the mass marketing of particular fantasies that drives themed environments is creating a type of inner conformity by limiting the range of topics people employ in their fantasies. Others have argued that themed stores are a part of a media society that continually blurs fantasy and reality and which may have ill effects such as decreasing our ability to relate interpersonally and to make good decisions (Postman, 1985). Some have even gone so far as to theorize that themed environments are gradually replacing reality with a type of marketable, dreamlike false reality termed “hyperreality” (Baudrillard, 1994). We agree that there may be important social concerns to themed flagship brand stores that are important for scholars to examine. However, consumers seem to be exerting a considerable amount of discretion with respect to their support of these fantasy retail realities. With the fading fortunes of large-scale theme concepts like Planet Hollywood and the Rainforest Café, retailers are finding practical considerations much more immediate than social concerns.

Themed retail operations, including themed flagship brand stores, are notoriously expensive to build and difficult to operate. For example, after a short and extremely expensive trial run on Chicago’s Magnificent Mile district (near ESPN Zone, Nike Town, and The Disney Stores’ flagship), Viacom closed its first and only flagship brand store, the Viacom Entertainment Store, in late 1999. Coca Cola and Warner Brothers closed their flagship stores on New York’s Fifth Avenue in 2000. The World of Coca Cola Museum in Las Vegas also closed that year. These events indicate that, even for major corporations with extremely strong brand images, themed flagship brand stores are risky propositions. That change is in the wind for themed retailing is a topic explored in the following section, which extends the concept of retail servicescapes to explore the future of flagship brand stores.

Illuminations: Futuristic themes

The Hollywood mytho-logic of mythotypes exemplified by ESPN Zone Chicago seems likely to expand throughout the retail environment, conjuring the magic of entertainment. When it does, what sorts of new sales sorcery might we see in the future? In order to lay the theoretical groundwork necessary for a coherent answer to this question, we return to Sherry’s (1998a) four servicescapes classification. We can begin with a model of flagship brand stores that represents the different types of themed brand stores we might observe. The three primary dimensions composing our model are retail orientation, cultural orientation, and brand orientation. Retail orientation reflects the extent to which the flagship brand store environment encourages and emphasizes making the short-term sale (as in traditional retail stores) over longer-term brand building (as in current manifestations such as Nike Town or the Coca Cola Museum). Cultural orientation refers to the level of grandiose artifice presented in the flagship brand store, from the more mundane to the awe-inspiring. Brand orientation refers to the multidimensionality of the brand personality and imagery portrayed in the flagship brand store. For example, we note that Kenneth Cole flagship brand stores exhibit a fairly unidimensional linkage between urban, tongue-in-cheek, and chique hip, whereas the older version of Nike Town exhibited a highly complex linkage between the Nike brand and play, art, spirituality, nature, and technology (Sherry, 1998b).

Fig. 2 represents a way to understand the different dimensions and forms of flagship brand stores and to present normative advice about their development. The pyramidal shape of Fig. 2 is intended to indicate that spectacular cultural orientation, the experiential retail orientation, and the multidimensional brand orientation are more rare and more difficult-to-manage aspects of the flagship brand store experience. A landscape-themed flagship brand store would, for example, have the most ordinary or mundane cultural orientation as its theme, a retail orientation mainly toward the purchase of goods rather than the purchasing of experience, and the most unidimensional presentation of, or orientation towards, its brands. In ascending order, marketscape-, cyberscape-, and, finally, mindscape-themed flagship brand stores would exhibit the most extraordinary, experiential, and multidimensional qualities. The increasing importance of these qualities is suggested by our ethnographic field observations. The need for a higher quality, more experiential, more spectacular, more technological, more emotionally engaging, more multifaceted presentation of brand image and personality, and more complex retail environment should have significant repercussions for retail operations and consumer behavior. In this section, we employ and extend Sherry’s typology to project the future of flagship brand stores. Throughout, we develop practical guidelines and suggest particular types of themed flagship

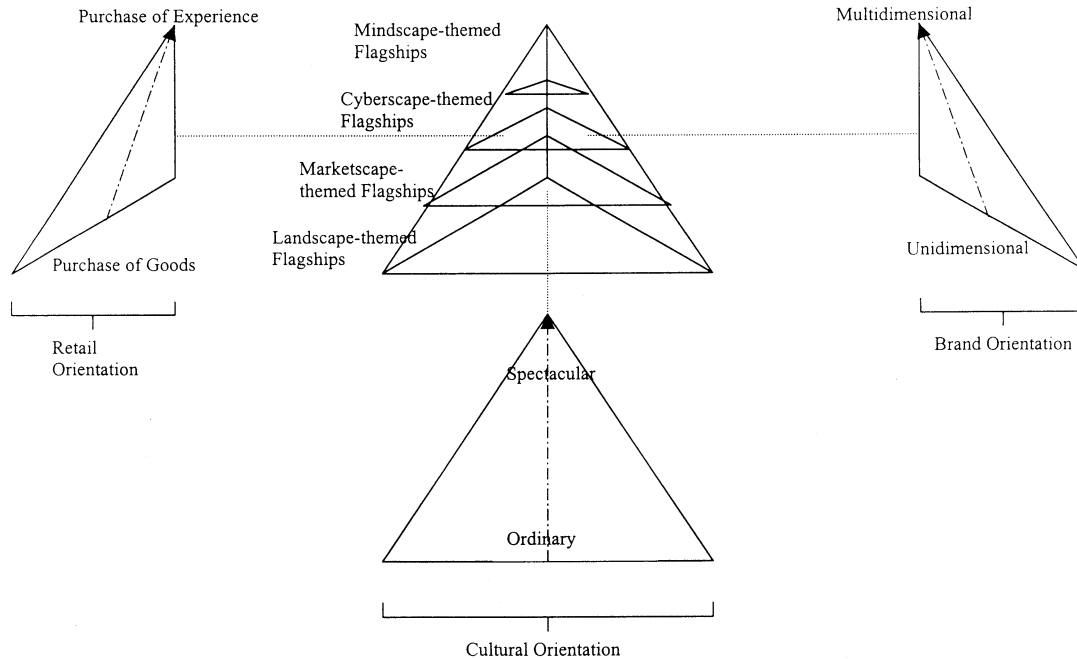


Fig. 2.

brand stores that are most likely to benefit particular types of brands.

Landscape-themed flagships

As the primordial reality of land, trees, and fresh air becomes, increasingly, an “extraordinary experience” (Arnould & Price, 1993) for most urban-dwelling Americans, the marketing of “natural” experiences will continue to be important for retailers of particular kinds of products and brands. Brands that lend themselves to a nature-based theming will have a cultural connection to nature. For example, those related to outdoor sports, health, travel, beauty, food, medicine, and fitness-oriented products and services may benefit from providing in their physical environments a sense of the natural absent from the ordinary daily experience of many consumers. Taking the notion of landscaping to an entirely different level, we might have flagship brand stores that form artificial living ecosystems, retail equivalents to Arizona’s Biosphere II experiment. Notions of the body, the natural environment, the primitive, and the organic will be, of course, subject to endless scrutiny and revision within such servicescapes.

Bridging the gap between the cultural and the natural will provide challenges and opportunity for many flagship brand stores. Bridging this gap can be done by constructing a more natural setting for brand building, perhaps by incorporating brand imagery into existing consumption activities, such as rallies, gatherings, holidays, and the “brandfests” described by McAlexander and Schouten (1998). Moving to natural settings may also mean a more transparent production process. The increasingly evident appeal of factory

tour-type operations will likely come into play in the future, as the success of the Crayola Factory, Hershey’s Chocolate World, and Kellogg’s Cereal City U.S.A. is duplicated. Even toothpaste factories (e.g., Tom’s of Maine) and garbage dumps (e.g., Fresh Kills landfill in New York) are turning into themed flagships. This presents multiple opportunities for manufacturers, who often need to make only minimal investments to turn factories into consumer theme parks and museum-like showcases. Like themed flagship brand stores in general, manufacturers selling direct to consumers may present threats to retailers further down the supply chain. For example, these stores may need to emulate Nike Town, which enacted full list pricing policies in order to avoid alienating other retailers who sold Nike shoes in less spectacular and less trafficked environments. Yet while a theming strategy may be enticing to many manufacturers, success with it may often prove elusive. The more spectacular variety of flagship brand store can be very capital intensive because of its need for a trained labor force, technology, constant updating, and high profile, high-volume real estate. The firms that will succeed in this transformation will be those that can leverage an intrinsically strong product or brand interest into an adaptable and truly entertaining consumer experience, one that consumers will pay to see again and again (see Pine & Gilmore, 1999).

Marketscape-themed flagships

As the new global cultural system evolves, it is clear that retail locations are playing an important role in promoting the “structures of common difference” that bind local cultures together and represent them to natives and tourists

(Thompson & Tambyah, 1999; Wilk, 1995). The openness that is important to individual expression is even more important to the expression of ethnic, nationalist, urban, religious, political, racial, and other critical differences among people that are inevitably reflected at the retail level.

As transcultural economic forces homogenize cultures, equally strong cultural forces fragment and differentiate them. The result is a kaleidoscopic consumption world. For instance, ESPN Zone Chicago customizes the same ESPN Zone architecture developed for the Baltimore, Washington, and New York locations, yet covers it in sports content rich with Chicago-ness: Bulls, Bears, Blackhawks, Cubs, White Sox, and other native iconography. Wise from its Japanese success and Euro turnaround, Disney is mastering the global-local balance. It is also providing clues for other aspiring retailers to follow. ESPN's formula suggests that the way for organizers of flagship brand stores to maintain the identity of the brand across multiple participants is to provide construction templates that can be customized for local tastes. While the physical structure (the building and its layout of zones) remains almost identical, the content is customizable (the artwork, the displays). Content will not only change by city, and even neighborhood, but should change over time to keep up with rapidly altering cultural tastes. In a themed flagship brand store, constant market research and considerable cultural knowledge will be required to identify and test the touchstones that will work as meaningful mythotypes. In keeping with the fixed-flexible/global-local format, while ESPN uses local talent and hires enthusiastic sports-minded young people, the training of service staff is homogeneous across these different locations. Similar methods have been developed by Wal-Mart, which allows and incentivizes wide discretion for local managers to stock products customized to local tastes, and trains local people in standardized procedures.

Brands that will benefit most from a marketscape type of theming will have a cultural connection to ideas of community, such as those associated with real estate, dance, music, books, and coffee. Symbolic richness will drive the success of many other types of themed flagship brand stores if they can express and keep up with local customs and communities. One important key to success will be to define the product and the flagship store as a communal gathering place. This can happen online, in virtual communities (Kozinets, 1999), and in physical locations that promote specialized consumption of whatever unifying product, service, or idea is being consumed (McAlexander & Schouten, 1998), be it sports, environmentalism, bisexuality, fashion, or chocolate. The most powerful flagships will combine gathering in person with online gathering, so that a group of interested consumers can find meaningful community in an environment largely controlled by retailers. As the ideals of marketspace flagships filter through the world of retail, manufacturers may increasingly recognize that the total packaging of a product ends not with a thing itself, nor its container, but continues to include its position in a store,

the entire store environment, the mall, district, city, nation, and in cyberspace. Successful themed retailers will localize, localize, localize their location, location, location.

Cyberscape flagships

Cyberscape flagships will become one of the hottest arenas of retail development in the next decade. Charting the territories between clicks and bricks will be the imperative of retailers required to solve the mysteries of e-commerce brand building before they are competitively outflanked (Ginsburg & Morris, 1999; Riewoldt, 2000). The rewards to the winners (and even the perceived winners) in the new game of "etailing" will be considerable, and the stakes high (Gerbert et al., 1999). A boundary-blurring question that must be answered is "Can consumers be in two places at once?" Will consumers want to don virtual reality goggles and gloves while surrounded by a spectacular retail environment? (Hint: they do at Disneyland). What can be done to make an at-home e-commerce expedition more like a "real" shopping trip? Can "real" smell, touch, exercise, and community be simulated nearly to perfection? Can the mysteries of delivery be solved?

It seems likely that, even with the ongoing hybridization of clicks and bricks, the competition between electronic and physical retailing realms will not let up any time soon. By offering a spectacular "extreme," physical retail locations will increasingly emphasize what they can provide that the Internet cannot: overwhelming sounds, sights, smells, and places for physical human contact (Ginsburg & Morris, 1999). Bricks will redefine and highlight their environments while their advertising taunts e-shoppers with "get-out-of-the-house" and "get a real life" themes. Flagship brand stores in cyberspace will emphasize the advantages that only they can provide—bridging global and local tastes, marshalling vast choices, offering expert personalization and customization, and, on an extrasensory level, warping people's sense of space, time, and possibility.

Brands that will benefit most from a technological theme will have a cultural connection to ideas of electronics and innovation, such as those for computer hardware and software, telecommunications, medical and health goods, automobiles, and travel services. Another area with a natural fit is that of fantasy and entertainment, where the impossible can be made real through technology. Toys for children of all ages, such as videogames, fit well into the cyberscape theme. Melding cyberscape and mindscape will provide consumers with mind-bending new experiences. Positioning the consumer as a godlike entity, flagship brand stores in the future will allow consumers to experience and shop at related stores around the world, bridging borders and moving forwards and backwards in time. The mediascape (Appadurai, 1990) of themed environments, online and off, will proliferate, merge, and jostle the very concept of a singular "reality" into the dustbin of antiquated thinking.

Mindscape flagships

Encompassing virtual reality and mediascape fantasy, mindscape is metaphysical inner space accessed by retailers. The notion that inner space can be penetrated through the efforts of retailers is not unreasonable, especially given the central importance of place in structuring consciousness. Mindscape flagships like ESPN Zone and Nike Town are what Ritzer (1999) terms the “new means of consumption” (NMC) and, he argues, can be seen as “cathedrals of consumption” because they possess enchanted, sometimes even sacred and religious characteristics for many people. However, rather than interpreting their potent qualities as religious, we might rather note that NMC flagships offer consumers new ways to construct meaning that are precisely contextualized and thus personally relevant, in the same way that popular culture is deeply meaningful to its fans (see Kozinets, 2001). Demonstrating a difference between our interpretation as researchers, and consumer perceptions of their own experiences at ESPN Zone, NMC-themed flagships are metaphysical not in that they are necessarily seen by the consumers who experience them as religious or spiritual, but because they allow consumers to feel a sense of the extraordinary, and to lose their sense of time and place in the all-involving state of what Csikszentmihalyi (1990) terms and describes as “flow.”

Brands that will benefit most from mindscape-related theming will have a cultural connection to ideas of growth and development, such as those for travel, education, self-improvement, training and development, and spirituality. Conscious acknowledgment of the brand’s connection to mind and spirituality is possible, but not necessary. An example is provided by Seibu, a major retailer in Tokyo (Creighton, 1998). Shoppers enter the store as neophytes at the first level. As they move through the physical levels of the store, the increasing levels of the store are themed to connote increasing levels of consciousness. Finally, shoppers emerge at the summit of their journey as complete shoppers and, it is symbolically inferred, complete human beings (Creighton, 1998). Seibu’s NMC mindscape offers consumers, in a playful way, the surface appearance of a spiritual tradition associated with philosophical meaning and personal development.

Seibu is a fascinating example because it shows how retailers are boldly colonizing the space previously reserved for religion, spiritual movements, and cults. At one point in human history, the most elaborate and expensive architecture was reserved for churches and other places of worship. Today, much of our most precious and elaborate physical space is dedicated to retailing experiences. The movement indicates not only a significant change in real estate or retailing, but also one of considerable social importance. Having projected the importance of mindscapes, cyberscapes, marketscapes and landscapes, we can now turn to our concluding section for further practical implications of themed flagship brand stores.

Conclusion

For contemporary manufacturers and retailers, the move towards an increasingly themed retail environment may signal a new way of thinking. Manufacturers with strong consumer brands must increasingly ask to what extent they are and should be in the business of providing entertainment and particular kinds of experience (Pine & Gilmore, 1999; Wolf, 1999). For manufacturers, the option to open a themed flagship brand store is a complex and challenging one. Major themed flagship brand stores are expensive to develop and maintain, and complicated to run. They require manufacturers to enter not only the retail business, but also the entertainment business. They require new sets of skills in merchandising and technology. They also require considerable skill in human resource recruitment and training. Consider, for example, that ESPN Zone’s Chicago location has 23 managers and more than 300 employees. Themes often require entertainment company alliances, such as McDonald’s alliance with Disney, and the building of new core competencies and niche offerings in the entertainment business.

Yet it is also clear that themed flagship brand stores are not always necessary. To paraphrase Freud, sometimes a Coke is just a Coke. When price, convenience, brand choice, and speed are the main issues, theming may be a waste of consumers’ and retailers’ time and money. The major, multimillion dollar themed flagship brand store is most likely to be effective for brands with an intrinsically wide appeal (like Coca Cola), strong appeal (like Disney), or local appeal (like Ghirardelli chocolate in San Francisco). They must already have, or be constructed to have, a strong experiential element that consumers will find engaging and attractive (which helps explain why entertainment companies are at the forefront of this industry). Another condition that helps brand stores successfully achieve effective brand building is a brand empire that is so widespread, far-flung, recognizable to the mass-market, and powerful (e.g., Nike, Coca Cola, Disney, Microsoft, Kellogg, Hershey) that (1) there will be an intrinsic audience willing to enter, stay, and buy entertainment services at the store, and (2) the expense of the themed store can be written off against its long-term promotional power.

We assert that theming has wide appeal in conditions where customers are looking to linger, play, seek community, learn, or grow (ideal for many desirable categories such as tourists, stranded travelers, students, families with children, single individuals, or the elderly). If landfill sites can become theme parks, there are few intrinsic limitations besides human imagination. We envision numerous opportunities for smaller manufacturers and retailers to engage in theming practices. Costumes, a paint job, a few signs, and lots of worker enthusiasm may suffice as minimalist retail theater.

For more major pursuits, comparable to ESPN Zone and the World of Coca Cola, an important condition for success

is considerable financial backing and human resource commitment. Commitment should probably come from the highest levels of corporate management. Budgets for flagships brand stores should be viewed as part of a long-term brand building strategy and as an entry into a different type of business (i.e., quasi-entertainment). Some portion of the firm's advertising budget may need to be tapped, and any "paper losses" interpreted as long-term investments in brand building (whose success should be tracked and measured just as any other form of advertising would be).

The development of a successful large-scale themed flagship brand store will require millions of dollars in development money and millions more to architecturally execute. To become spectacles, the stores tend to be large. To be effective, their managers must master the business models of the new industries they enter (e.g., the restaurant industry, sports bar industry, or videogame arcade industry), capitalize appropriately, and train their personnel extensively. To be profitable, they must be able to draw a large crowd of paying consumers. As the successful flagships prove, tourist trade in tourist cities is probably the most viable option. Given the success of "local" brands such as Nike Town and ESPN Zone, it is likely that the localizing of content is performed more for the benefit of tourists than natives. With these conditions for effectiveness met, the themed flagship brand store can serve as a form of advertising, a source of profit, a fount of marketing intelligence, and a forum for experimentation with local content, entertainment offerings, technology, and new forms of bricks-and-clicks combinations.

Once placed in its flagship setting, a brand draws meaning from architectural form. Form, it must be acknowledged, is "its own visceral, physical inherent meaning" whose nuances may not adequately be captured by words; the flagship brand store becomes an "autonomous presence" (Habracken, 1998, p. 233) contributing to the brand's essence at least as much through connotation as it does explicitly. The architecture of 21st century retail theater will increasingly incorporate the tacit meanings of form to interact with consumers as they cocreate brand essence. By combining the ordinary with the mythic, the profane with the sacred, and the innovative with the familiar, producers will build environments that entice even as they reassure. Experience design will become the guiding philosophy of merchandising.

Speaking both from theory and practice, we might consider the therapeutic urge towards self-fulfillment, self-transformation, and self-improvement. This urge is a powerful cultural notion that has been thoroughly documented by a range of scholars (e.g., Crawford, 1992; Cushman, 1995; Fox & Lears, 1983; Lears, 1994). We believe that, based on our examination of the retail mindscape, these two ideas—entertainment and therapy—will be combined even more powerfully in the future. We suggest that a formula for brand success in the new millennium will couple the drama

of marketplace retail theater with the American therapeutic cultural principle in a themed retail environment.

As we have described it here, the "killer app" of retail theater is ultimately spiritual in nature—that is, it is metaphysically attuned to the nuances of living as a consumer in the material world. This spirituality is populist, informal, nondenominational, inclusive, timeless, meaningful, transcendental, holistic, and centering (Mitroff & Denton, 1999, p. 23–25). It drives the feelings of soulful materialism (McNiff, 1995) and commodity Zen (Fjellman, 1992) that consumer researchers have explored for over a decade (e.g., Belk, Wallendorf, & Sherry, 1989). While we have lodged this sense of spiritualized salesmanship into a mindscape category, we have also sought to emphasize the embodied nature of the sensation (Lakoff & Johnson, 1999). As theorists propose increasingly integrated models of human experience (Wilber, 2000) and as marketers come to understand the everyday experiences of consumers, retail servicescapes will evolve into more primal and satisfying forms, reinvigorating their ceremonial and dramatic qualities. The marketplace will once again become a festival, a border-place full of mystery, cultural exchange, community, and delight. Despite their social and market pitfalls, themed flagship brand stores may help to light the way.

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