

The Role of Visual Merchandising to Position Fashion Retailers: a Key Place in Spanish Literature

El rol del *visual merchandising* para el posicionamiento del retail en moda: un lugar clave en la literatura española

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ABSTRACT

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The review article examines the communication and marketing tool called visual merchandising (VM) by which the product and the brand are displayed through the store. The elements of VM transmit particularly an emotional identity in fashion retail. The international success of Spanish companies like Zara, Pronovias and Mango is linked to the visual communication of the brand image through the universe of retail. VM needs to find a place in academic Spanish literature for the first time as it has attracted recent interest from the professional approach. The status quo covers national and international publications from the first publications found in 1980 to 2017. The type of documents reviewed are national and international database, specialized journals in consumption, brand management and retail, as well as textbooks of design, communication, marketing and sociology, catalogues at libraries and universities. Besides, interviews with academics, consultants and visual merchandisers in Spain constituted a valuable source of information. Results suggest that VM helps Spanish companies to gain brand recognition and positioning -in an effective and coherent way- and lead consumers to simplify shopping decisions. Among the conclusions, it is highlighted that VM also contributes to the creation of emotions in textile retail through the store personality. Brands that bet for this creative and strategic tool are best global brands. Subsequently managerial implications include more investment and research on this essential tool for textile retail brands in Spain. Retail's bases are established with this work as offline behavior is the strongest predictor of online shopping, a future research field for visual literacy.

RESUMEN

Clasificación JEL:
M31, M32**Palabras clave:**

Visual merchandising,
revisión de la
literatura,
personalidad de
marca,
imagen de la tienda,
identidad emocional

El artículo de revisión investiga la herramienta de comunicación y marketing llamada *visual merchandising* (VM) mediante la cual el producto y la marca se exponen en la tienda. Los elementos del VM transmiten particularmente una identidad emocional en la industria de la moda. El éxito internacional de compañías españolas como Zara, Pronovias y Mango se vincula a la comunicación visual de la imagen de marca a través del universo del *retail*. El VM necesita encontrar su sitio en la literatura académica española por primera vez ya que ha suscitado un interés reciente en el ámbito profesional. El *status quo* cubre publicaciones nacionales e internacionales desde las primeras manifestaciones encontradas en 1980 hasta 2017. El tipo de documentos revisados son bases de datos nacionales e internacionales, revistas académicas especializadas en consumo, gestión de marca y *retail*, así como manuales de diseño, comunicación, marketing y sociología, catálogos de librerías y universidades. Además, se ha considerado como una fuente importante de información las entrevistas con académicos, consultores y *visual merchandisers* en España. Los resultados muestran que el VM facilita a las compañías españolas obtener reconocimiento de marca y posicionamiento de manera coherente y efectiva y conduce a los consumidores a simplificar las decisiones de compra. Entre las conclusiones se puede señalar que el VM contribuye también a la creación de emociones en el *retail* textil a través de la personalidad de la tienda. Las marcas que apuestan por esta herramienta creativa y estratégica se encuentran entre las mejores marcas mundiales. Luego las implicaciones para los directivos incluyen mayor inversión e investigación en esta técnica esencial para las marcas de *retail* de moda en España. Con esta obra se ponen las bases del *retail* ya que el *retail offline* es el predictor más fuerte de la compra *online*, un campo de investigación futura sobre el conocimiento visual.

1. Introduction

The world of stores has changed. The strong arrival of ecommerce through mobile devices, proliferation of shopping centers linked to leisure, internationalization of companies in countries whose cultures are different than their place of origin, the presence of international brands in national shopping centers, the spread of renowned firms' outlets, and awareness for sustainability are some of the factors that drive the efforts of traditional establishments to improve their image – because image is what connects to the customer. It is in this environment that businesses want to make clear how brands physically attract consumers into the stores through their emotions.

There is a marketing tool that integrates the relationship between brand, consumer, product and environment: visual merchandising (Bailey & Baker, 2014). Lea-Greenwood (1998, 2013) studies the role of visual merchandising (VM): “the first visual communication of the positioning/image statement of the store's offer” for fashion retailers in UK. The author defines VM as “the re-naming of display that has led to centralization and professionalism of the function”. VM is demonstrated to be the most effective strategy to communicate brand identity in the store place, that is, a location where a brand says who it is. In fact, store atmosphere and merchandise display have the capacity to communicate “a unique script” (Easey, 2009, p. 236).

In the beginning, ‘in-store brand’ was understood as a window’ logotype to identify the category. From the second half of the 20th century, shopping has had a high emotional and affective content, not only as the place of purchase, but also because the brand chosen expresses something about consumer personality and corporate identity, defined as “a set of stimuli that in few

seconds can give the spirit and value that the enterprise wants to communicate” (Soto, 2012).

In Spain “ecommerce has become a main business channel in the global growth strategy (...) 56% of companies sell offline and online (*brick & click*) and 44% just through Internet (...) and there is a prediction of a reduction of physical stores (*brick & mortar*)” (Josa & Llovet, 2015: 141). Other countries such as United States show different data. Only one-third of the physical stores are open due to high costs and the high rate of purchases on Internet¹. The success of the online stores is still “closely bound to retail's brand universe,” as the Inditex case study explains, according to the report *Best Spanish Brands*, published by Interbrand (2011, p. 51). The report says that in Spain, 58% of online fashion consumers interviewed by Google are resistant to buy textile sector goods through Internet because physical contact is considered irreplaceable, or because “consumers do not expect to receive the same brand experience”.

The evolution of physical stores confirms that they still have a prominent role for the success of the brand experience and influences on the online stores. One of the keys is to connect the image of the physical store with the image of the online store. For example, the use of digital screens at the windows of Diesel and Ebay, the digital hangouts of C&A connected to the followers of the brand at Facebook and the combination of digital walls, staircase and floors that plays the role of a catwalk for Louis Vuitton (Josa & Llovet, 2015, pp. 147, 149-150).

The purpose of this research is to focus on the role of VM to position an emotional identity in

1 The source is an interview with Stephen Doyle, Senior Lecturer in the Glasgow School for Business and Society (Glasgow Caledonian University).

fashion retail, is considered most interesting for Spain where emotional strategy has driven some brands to success, in contrast to most of them who have not yet full success due to a focus on functional design or excellence in service (Interbrand, 2011). In this context, retail system is identified as the most influential force shaping the modern city (Kirby & Kent, 2010), and the support strategy for organizational growth that establishes a place to unite brand target (Doyle *et al.*, 2006). As such, it is necessary to value professional work devoted to “design spaces that project the brand into the store in a strategic manner” (Soto, 2012, p. 7).

2. Questions, objectives and methodology

The present research aims to study the contribution of visual merchandising (VM) to position emotional brands in fashion retail. The relationship between VM and emotions will be assigned to brand personality, the responsible for converting stores into brands.

To answer the proposal made, the following questions were formulated:

1. Is VM a tool of communication, brand recognition, and positioning as other tools (advertising or packaging) have demonstrated (Halliday, 1996)?²
2. How does VM contribute to the creation of emotional value in textile retail?
3. Which VM elements best communicate emotional value?
4. Is VM an essential tool for textile retail brands?

The general objective of this article is to analyze the contribution of VM to communicate brand identity in retail, and specifically to conclude whether VM communicates an emotional brand personality to textile retail. This objective implies five specific objectives:

1. To define VM in textile retail and VM elements that brands value most.
2. To value VM's work as a main retail element that builds emotional image and emotional positioning for fashion brands specially in Spain.
3. To comprehend in the retail industry literature the reach of ‘store image’ and ‘visual merchandising’; its development through commercial application; and the relationship between both concepts and consumer perceptions about brands.
4. To provide recommendations to brands that could help design store image strategies based on VM so that they improve emotional image and sales.
5. To identify VM as another source of creating associations as an integral part of marketing communications system.

The methodological approach to the purpose of this research is a conceptual perspective, from which it is possible to deduce the concrete form in which the VM develops brand personality at the point of sale. The methodology used is the literature review among national and international database, specialized journals in consumption, brand management and retail, as well as textbooks of design, communication, marketing and sociology, catalogues at libraries and universities. The status of the issue covers from the first publications in Spanish on visual mer-

² Halliday (1996) highlights Chrysler's advertising as a good example for creating brand personality and emotional attractiveness.

chandising found in 1980 to international references till 2017.

There are several reasons to choose the review as the methodology. These arguments would explain why it was decided to offer a wider vision, combining the literature research with references from the professional field, which also shows the interest on a topic that everyone experiments. Interviews and meetings although could not be considered among methodology but as sources of knowledge, helped to provide a context for the finds of the research, give them the adequate weight, to understand VM practice and to cover the gaps in Spanish references regarding VM. This research has also been complemented with many store visits.

First, due to the shortage of Spanish academic field, it was necessary to develop a more theoretical investigation that will guide a future empirical research. Therefore, given the emerging nature of subject and the initial effort to make a theoretical basis on the professional reality, this research implies a broad literature review about terms and the status of the issue. Facing the need to find relevant information, informative articles have been considered and some used as main references for this work.

Thirdly, the interview with experts and visual merchandisers was thought to be a complementary method to the theoretical compilation, but the non-homogeneous answers from experts and the confidentiality of companies together with the request from exclusivity was not compatible with the aims of this research³. In Spain, it was especially productive to have conversa-

tions with the consultants Carlos Aires, Founder of the first Spanish firm specialized in VM, Marketing Jazz, and George Homer, Director of GH & Associates In-store Solutions, and professor of VM in the Fashion Institute of Technology of New York and Fashion Business School ISEM – Universidad de Navarra).

In the UK, research was enriched by meetings with authors of VM and branding literature conducted in 2011. Gaynor Lea-Greenwood, Senior Lecturer in Fashion Marketing and Buying at Manchester Metropolitan University; Tony Kent, Associate Dean of Research at London College of Fashion (University of the Arts, London) and Professor in Marketing who specializes in branding; Stephen Doyle, Senior Lecturer in the Glasgow School for Business and Society (Glasgow Caledonian University) and who specializes in retailing and fashion brand management; Ronnie Ballantyne, Professor and Lecturer in Marketing at Glasgow Caledonian University, is focused on consumer choice, and an industry consultant on brand image and personality for the last 14 years; Grete Birtwistle, Professor at Glasgow Caledonian University and Cofounder of British Institute for Fashion Research, where she has researched image strategy and British fashion brands positioning, as well as consumer store perception. (See Table 1)

3. Status of the issue

Several elements need to be defined and related before explaining the role of VM in communicating emotional brands through the fashion retail: VM, retail branding, brand personality and fashion. The flourishing panorama of fashion retail in Spain requires the study of a marketing

³ The guide for the in-depth interview was sent by email to sixteen brands, whose representatives were also contacted by phone (but only five answered): Bimba y Lola, Mango, H & M, Purificación García, Carolina Herrera, Custo, Loewe, Desigual, El Corte Inglés, Gloria Ortiz and Primark. H & M and Primark explained, through their Dircom (Di-

rector of Communication) or consultant, that there were sensitive issues related to business core.

Table 1. Interviews have constituted a main source of information about VM practice in Spain

Name	Position	Institution
Jesús Echevarría	Director of Communication Department	Inditex
Alberto Criado	Director of Visual Merchandising	Zara
Richard Gum	Director of Sales	Cortefiel Man (Cortefiel)
Juan Manuel Gil	Director of Visual Merchandising (last five years)	Hoss Intropia
Iván García	Director of Visual Merchandising (last three years)	Las Rozas Village
Rafael Puente	Freelance Visual Merchandiser (last 35 years)	La Martina

Source: Original material.

tool that cooperates to communicate the brand within the integrated marketing communications approach.

3.1. VM, retail, branding, fashion

VM is examined as one of the brand's communication tools as it is related to the company's positioning; that is, how visual identity presentation in retail improves the purchasing experience. Besides, VM has been described as the commercial presentation of the brand promise at the point of sale. In it, new VM's tasks, more than just window dressing, can be observed turning the store into a strategy of support for the product and the brand, and much more than simply in a distribution role.

The store environment, understood as a communication tool by itself and as a stage for interaction, is found in its paradigm in Zara. The best strategy and tactics are employed, from the location and size of its establishments to the details of style and aesthetic. Retail shows perfectly the difference between buying as a transaction and buying as a way of living an experience. The fashion sector reflects the dominance of the intangible as the best guarantee of market share.

The store stands as the source of authority and influence in fashion, and a place where the customer feels himself as the hero of a movie.

For industries as fashion, VM is the stage with equal or more effectiveness than other strategies (advertising, packaging) which reinforces a coherent brand message in an integrated marketing communications (IMC) approach. IMC is understood as "the system by which enterprises coordinate their marketing communication tools to communicate a simple, clear, coherent, credible and competitive message about the organization and their products" (Jobber & Fahy, 2007, p. 226).

Brand personality is closely related to consumer experience. Personality makes a brand valuable in the consumer's life and identity. It does this by turning brand into an experience, an attitude, and a lifestyle that produces emotional and self-expressive benefits (Cerviño, 2002: 73-75). The emotional aspect of experience is what builds a memorable brand (Pine & Gilmore, 1998: 97). Experiences that engage the client most are the ones that communicate through five senses (sensorial experience), and is what occurs in store environments. In this con-

text, VM is a tool that helps transfer brand personality to the store and then to the client.

Retail is a frequent business model in the textile area, and is used to refer to 'stores'. Expressions as 'point of sale' has been followed by 'retail' because it has been revealed that point of sale not only sells but also builds brand image. Evidence of this assertion is that in order to assess consumer perception about brand, brand image, some authors use store image directly. Creating and developing brands through retail has been converted by business schools into 'retail branding', according to an opinion published by IE Business School in 2011. Other evidence that store does more than just sell (Ridgway *et al.*; 1994; the Author, 2010; and Soto, 2012) is to name it 'point of sale'; that is, to say that all its elements are oriented towards clients' involvement in the buying process.

Other distribution system models, such as wholesale, outlet (traditionally known as the end-of-season discount but recently transformed into a distribution channel that reserved a percentage of their production) or, online, will be considered in this work, but we find that retail is where VM is better controlled and where brand personality is presented in a more evident way because of its own characteristics.

Nowadays, brand value is in the scenario of interactivity where brand is managed more than in product, according to experts (Kent, 2003, 2007; Benavides, 2011; Alfaro, 2012). The idea of value as an interactive, relative and preferential experience, considers the duality of the rational-emotional in human behavior, overcomes the classic approach of functional value based on economic utility. Throughout this work, we will analyze these approaches deeply in order to define types of brand benefits. Alfaro (2011), sums up 'value' as the ability to recommend and

build brand loyalty and recognizes the source of value in aesthetic design as being able to produce positive impressions through brand personality. Gallarza & Gil Saura (2006) perform a literature review of the concept of 'value' in the consumer environment and assign its dynamic nature to the appearance of the Internet. The authors suggest a scale to measure value based on a balance between benefits and sacrifice: positive elements such as 'quality' and 'satisfaction', and negatives such as 'psychological cost' in which they conclude the pre-eminence of the quality-cost relationship (without obscuring the difficulty of applying it to the service sector because of its greater intangibility).

Taking into consideration Bordanova's opinion, published by magazine *Marketing+Ventas* (2007: 54), 'value' in retail business is defined as "the special relation with buyers so that through actions, activities, and tools applied to each phase in the route of point of sale, helps to sell and increase loyalty". Some examples of activities are interactive displays because they evoke emotions that make a unique and individual experience (Kozinets *et al.*, 2002: 20). Academics use 'brand theatre' or 'retail entertainment' to talk about the most important marketing and communication strategy in fashion sector where point of sale is the main character, because of the experience provided by buying and by visiting the store. This term also appeared in Bordanova (2007: 54), who states that "to visit a store can be much richer than just a purchasing transaction".

The store has the ability to become a socialization and leisure place (Seock & Lin, 2010) in order to obtain higher profitability through traffic and income. In Alfaro's words (2012: 16), the ability for entertaining "captures hearts, minds and buying decisions". An example in online ap-

parel retailers is the use of visual sensory enabling technologies that “enhance consumers’ enjoyment of the shopping process on their web site” (Jiyeon&Forsythe, 2009).

The textile industry in Europe is characterized by “fragmented production, highly concentrated distribution and intense and democratized international competition,” so “it is recommended to reappraise business systems adapted to continuous change in consumer pleasure” (López & Fan, 2009: 280). Understanding and satisfying consumer needs, expectations, and wants was the purpose of Jolson & Spath (1973: 49), after analyzing a scenario where retailers did not consider facets that really motivated consumers –such as store location and specialization, quality–cost relationship, quality and merchandise availability.

Finally, it is required to define another element in the purpose of this research. Although terms ‘fashion’ and ‘textile’ are used equally in media to refer to the business, groups, or sector firms, when ‘fashion’ is used, it will be focused on textiles (clothing and some footwear, only). In Spain there is no fashion sector category, but a textile category which includes clothes, home and home accessories, according to an Acotex report in 2013. The fashion industry has been associated to a communicative dimension because apparel communicates values and because “fashion must be communicated to be known, followed, accepted and consumed” (Quintas & Quintas, 2010: 200).

Jackson & Shaw (2001: 187) consider fashion in a broad sense as “style accepted by majority, and commonly expressed by clothes, hairstyle and other products and services related to appearance”; from shoes, fragrances and accessories, to hairdressing, image consultancy and cosmetic surgery (Easey, 2009: 3-4). But fashion also has to do with other visible lifestyle facets influenced by fashion trends.

3.2. Visual merchandising and retail in Spain

The Spanish retail fashion environment has evolved extremely during the last two decades. Spending on clothing increased from 2001 to 2005 but decreased more and more between 2005 and 2015, resulting a total of 6.000 million dollars less in the last 10 years (Kantar Worldpanel, 2015). The same source estimates the reduction in an annual average of 40 to 34 garments, a price average from 16% to 12, 6% and a spending average from 583 € to 437 € (although a 13% of Spanish fashion consumer’ spending average is about 775 €, according to Kantar Worldpanel in Revista inforetail, 2016). Moreover, in the last decade there has been a change from traditional commerce to fashion chains, and the textile sector has revived with a price rise and the adult target, due to and aged population or for an ‘anti-aging’ purpose (Kantar Worldpanel, 2015).

The report *Destination Retail 2016* (Simón, 2016) locates Inditex -Zara, Zara Home and Massimo Dutti- Mango and Desigual among 240 retail brands that have more international presence. Fashion industry in Spain generates since 2014 more growth (the highest increase of industrial fabrication since 2010), consumption and employment (an increase of 3,7%) while some other companies still face the strong competitiveness. An economic report of the textile industry (Modaes.es, 2015) explains that the international expansion of retailers -some of them worldwide leaders like Zara, Mango and Camper- has helped them to overcome the economic crisis and recession of the last years. For example, the challenging environment and a reduction of stores have influenced negatively to Desigual in the last year (Modaes, 2016).

We have identified specific reasons that support the study of visual merchandising’s fashion

brands in Spain. First, VM in textile retail needs to find a place in academic Spanish literature where it has attracted recent interest. In library catalogues, the term ‘visual merchandising’ is a recognized subject in an isolated way in an article opinion by Aires for Marketing y Ventas magazine (2008, p. 18), the dissertation and thesis by Llovet (2010, 2014), the Master’s dissertation by Bellvis in 2011, the final project of Río in 2012 -whose approach focuses on product distribution strategy and the force of the chain’s personnel- and Romera (2013). We also find one reference to online visual merchandising (Gusó, 2016). In university catalogues, there is a mention of the term in Spanish translation of Morgan (2008) and Bou (2008).

Nevertheless, terms like ‘windows, decorative design, interior design and store design’ show that Spanish research has studied the principal facets related to VM through communication studies, professional, technical and artistic training. As such, there are findings in ‘general design applied to commerce’ (Asensio, 1980 y 1992; Minguet, 2005; Serrats, 2006; Broto, 2008; Arenas, 2011; and Equipo Vértice, 2012), ‘windows’ (Mola, 1982; Vicens, 1990; Asensio, 1996; Collins, 1996; Valencia, 2000; Fernández Rivero, 2002; Rico, 2005; Bou, 2006, 2008; Bahamón & Vicens, 2009; Cabezas & Bastos, 2009; Calvo & Figueira, 2010; Soto, 2012; García Navarro, 2016) and ‘interior’ (Asensio, 2008; Francisco, 2008; Sánchez Ordoñez, 2010 and Carreras, 2013).

The remainder of Spanish literature regarding facets related to VM is presented through various translations (Cliff, 1993; Mostaedi, 2000; Calver, 2002; Pracht, 2004; Dallo, 2005; Lam, 2008; and Ching, 2011). Besides, there are also references in Spanish from the ‘merchandising’ approach (Salén, 1994; Burruezo García, 1999

and Martínez, 2005; and Jiménez Marín, 2016), ‘communication of fashion brands’ and fashion routes’ (Díaz Soloaga, 2007, 2014), ‘store experience’ (Alfaro, 2012), ‘advertising’ and ‘architectonic role of commercial shops’ (Cairns, 2009, and Losada, 2012). The explanation Losada (2012, p. 85) finds for limited references in VM is interesting. In the case of display windows, it is designed for at the moment; characterized as the “ephemeral, youthful and moody nature of the stores”, it seems to diminish the work that comes with it. Nevertheless, the author considers immediacy an advantage for the discipline, “that is laden with spontaneity in such a way that in those interiors it is simpler to identify glances and loans that in other projects are erased precisely because of its marginal character”. And finally, it is an opportunity for research which could be taken advantage.

Second reason is that investment in VM is prominent, considering its positive consequences on brand image and increased sales. Retail positioning influences sales and consumer perceptions (Newman & Darshika, 2004), and vice versa. Sales decrease with ineffective positioning against intense competition (Davies & Brooks, 1989 & Davies, 1992). Specifically, Dotson & Patton, 1992 studied how the recession affected large American department stores, such as Sears and Macy’s, from 1980 to 1990 when visits to the stores decreased from twelve to four hours per month. The fact is attributed to various reasons: lack of differentiation in store elements at point of sale (physical design, atmosphere and service) which implies a slow and boring shopping experience, and competition of specialized stores, such as Gap or Limited, and store saturation.

Despite window dressing, the principle VM element, being considered “the most profitable

advertising tool in retail commerce”, it is recognized that “a lot of traders neglect the use of window displays and invest much money in other methods”, and is recommended to “include window display budgets in the establishment’s global budget” (Equipo Vértice, 2008, p. 115). In Spain, since the late nineties, “there are few businesses that work with window dressing professionals on their staff, or as part-time (employees), although it is recognized that “more than 80% of sales depend on window displays”, according to Fernández Rivero (2002, p. 2). The author considers ‘windows’ beyond the work in exterior shop windows, but as the coordination of interior as well as exterior store image.

Thirdly, we realize that there is a lack of research in textile companies. Therefore, academic and professional literature is frequently combined. By making this information closer to the public, we reveal an increasing interest. Moreover, Zimmer & Golden (1988, p. 265) consider a problem of previous studies; store image is predetermined by the researcher, and therefore, does not capture the value of the retail businesses’ image because the information doesn’t come directly from those questioned.

Even if VM empirical research is limited, leading brands in value are also leaders in market share and invoicing every year. Facing this phenomenon, it’s also true that some brands could be more efficient if they did more research: optimizing resources at less cost and maximizing profitability. On one hand, the ranking Interbrand *Best Spanish Brands* for 2015 includes five fashion brands. Three of the companies belonging to Inditex group are listed: Zara (nº 2) and brand value 10.687 million Euros, Bershka (nº 5) brand value of 1.201 million Euros and Massimo Dutti (nº 12) with a brand value of 847 million Euros. On the other hand, according to

the *Acotex* economic report in, billing for the entire Spanish textile market 2013 (men, women and children’s apparel, home and accessories) totaled 15.850 billion Euros; Inditex’s contribution was 3.754 billion euros and Grupo Cortefiel, 712 million Euros.

A fourth reason to choose to study visual in retail is that retail is considered a business model perfectly adapted to the current market environment. Since the end of the 20th century, and above all, during this 21st century, great changes have been produced such as the proliferation of new technologies that influence marketing’s role in communications. This study meets the need to deepen the way in which it engages a new type of active consumer who “has opened a new way of dialogue and involvement”, according to Interbrand’s report (2011, p. 32). It is about promoting an experience that turns brands into emotions (Gobé, 2001). Experiential marketing creates a new relation between brand and client, called “revolution” by one of the main authors: Schmitt (1999).

Fifth, this research is especially convenient because of the influence of emotions as mediators of textile consumer attitudes. Apparel expresses who I am or who I would like to be, while taking into account the personal and social significance of consumption (Evans, 1989). Yoo *et al.* (1998) advises retail managers to make use of new ways to improve positive emotions and to reduce negative emotions in consumers. It is essential to ask if specific retail elements in the textile sector, particularly VM, influence decisively on consumer behavior. It is understood as “the group of physical and mental activities – shopping, data collection, familiar budget distribution– that takes part in one way or another and encourages them to buy, and to choose such product or brand” (Salén, 1994: 95).

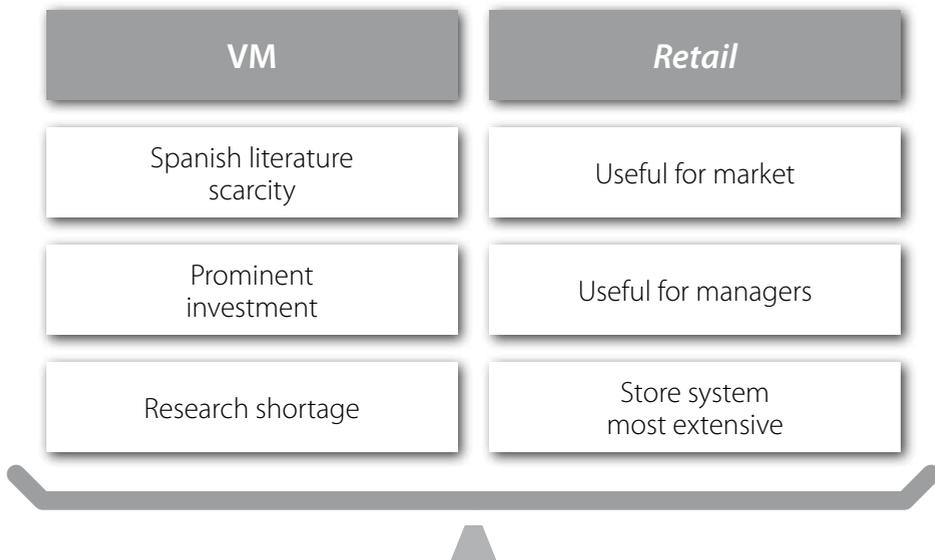
Finally, retail has been chosen because it is the most extended distribution system in the textile sector. According to the percentage of retail companies in Europe that affect the economy, the information regarding market share and consumer spending in the fashion subsector could be underestimated (Coca-Stefaniak *et al.*, 2010). Nevertheless, the retail sector constitutes one of the largest sectors of consumption when understood as an activity which builds both a social and personal identity. Additionally, retail it is a sector especially beneficial for industry positioning due to its intense competition (Newman & Darshika, 2004). Moreover, several authors (Schim & Kotsiopulos, 1992; Birtwistle & Freathy, 1998; Birtwistle *et al.*, 1999 a & b; Kerfoot *et al.*, 2003; Paulins & Geitsfeld, 2003; and Nobbs *et al.*, 2013) are focused on applying retail positioning principles and theory of store image's dimensions to the textile industry.

4. Results

Regarding to the first question about whether VM is a tool of communication, brand recognition, and positioning, it can be said that in the textile sector in Spain, VM appears to be a strategy linked to the business strategy. In fact, in retail, brand strategy is developed in store image through a group of attributes designed to appeal to clients. This strategy today has a main role above other activities —as retail organization—. This is due to a strategy that shows a quick option in the buying decision in a homogeneous market —in product or price — and a new way of differentiation based on the brand.

To evaluate the literature review implies to empower VM in literature in the retail sector which had not been considered as worldwide before 1980 according to Bitner (1992, p. 57). The author suggests that until that decade, VM (named 'atmospherics') has been recognized

Figure 1 · Reason to research VM in textile retail



Source: Original material

only as a tangential resource where managers “plan, control and build” with other aspects (of the business) that could benefit relationships in the organization.

Results about the second research question on how VM contribute to the creation of emotions in textile retail, VM can transmit emotions in a sector where visual representation of brands is especially significant. VM is an emotional tool as other marketing tools (such as advertising or graphics) but through the store’s personality endowed with the brand and through sensorial experience at the point of sale. The innate ability of retail to produce strong emotions encourages the emotional identity of brands, and is associated with its interactive character and closeness to the consumer. Indeed, the broader literature which has been reviewed does acknowledge the efficient contribution of VM to a brand personality that reflects the full dimensions of emotion.

Some brands that do not advertise or is scarce, could assign their success to VM (i.e. Inditex or Cortefiel), as is Zara’s paradigm in the global ranking of *Best Global Brands*. “Zara continues to expand its empire, with sales increasing 18 % in 2012 (...) the Inditex-owned brand is evolving its visual communications image to express a more sophisticated and aspirational brand image based on four key pillars: beauty, clarity, functionality, and sustainability” (Interbrand, 2013). “Zara reinforces its positioning on market (increasing 16 %) through shopping experiences. The strategic location of more than 2.000 stores all around the world contributes to the association’s consumers between Zara and Premium” (Interbrand, 2015). Other examples show the relationship between VM and other retail image attributes as occurs when the brand image uses communication based on advertis-

ing not only in the windows but also in the interior (i.e. Mango, Loewe or Armani).

We found third question-which VM elements best communicate emotional value- especially difficult to identify. In a context which favors a greater consumer experience, such as service, empirical research is needed to investigate how physical atmosphere has an influence on client satisfaction. Bitner’s research reveals the real impact of specific store elements’ design, for example, on social interaction. As Sen *et al.* (2002) indicates, there is a lack of academic literature about the concept and as an empirical study to truly value its professional role. The most recent aspects studied in foreign universities is VM in online stores.

While some authors stand that physical apparel, stores must evolve to let consumers enjoy a cyber shopping experience (Yaoyuneyong, Foster & Flynn, 2014; and Choo & Yoon, 2015) several defend traditional elements of store environment. In a research with consumers of Swedish retailer’s results prove that atmosphere, personnel and layout are most valued by consumers than advanced technology” (Bäckström & Johansson, 2017). In the same sense, Jain, Takayanagi and Malthouse (2014) identified five factors that make up consumers’ perception towards a show window, among which “feel good about the store” prevails social, hedonic, informational and image. For Park, Jeon and Sullivan (2015) in-fashion and attractiveness visual merchandising can influence positively in brand attitude and purchase intention. According to Nobbs, Foong and Baker (2015) the main elements of window display from the point of view of a non-participant observation and the visual merchandisers interviewed are color and lighting. However, the approach is different depending on the position that VM plays in the market place.

For some Spanish firms, VM is focused on store windows, and for others VM includes other retail image attributes – i.e. product display and space design. Nevertheless, the fact that each brand award different importance to VM elements explains their strategic use of VM related to their own brand values. Therefore, seasons such as Christmas or during price-reductions are periods of time when the buying intention is more influenced by cognitive and functional reasons related to the product – i.e. merchandise price reductions or social motivations for shopping. Precisely as Vignali *et al.* (1993: 59) suggest, it is important to not carry out surveys during the sales period to determine if clients are substantially different from clients during sales period. Regarding distribution as an influencing factor in VM, the outlet distribution system makes it difficult, and makes the work of VM more creative as it sometimes implies working with goods from previous seasons.

There are buyers that enjoy shopping for clothes and others don't; there are those who are conscious of the fashion sector and others who are not interested enough in VM's work. The research of Law, Yip and Wong (2013) finds different patterns in consumer behavior to evaluate visual stimulus in the stores. For the Eastern consumers that answered the focus groups "by considering the aesthetic, symbolic and cultural perceptions of a function-oriented product (intimate apparel), display elements, such as mannequins, color, lighting and props that emphasize feelings of feminine sexuality, tend to trigger negative affective responses in consumers which finally affect purchase intentions".

Regarding to the specific objectives on whether VM is an essential tool for textile retail brands, based on the definition and reach of the terms implied in the study, it can be affirmed that in

the Spanish textile sector, the terms 'merchan' and 'visual' are used to talk about VM departments and professionals that already exist. The synonym 'merchandise presentation' can also be used (Colborne, 1996) and "the merchandise presentation for selling, how it is coordinated and exhibited in the most attractive way to make the relationship between seller and consumer easier" (Bou, 2008: 10). Even though these allusions to VM imply more facets than the merchandise (atmosphere, image and design), without a doubt they mention the VM's ability to present not only the product but also brand image, a principle value in today's society. The second term generalized in Spain is 'retail'. In Spain there is no word that defines the significance of 'retail'. The same is applied to the Anglicism 'retailer', which is generally translated into, literally, 'point of sale manager'. We have confirmed that not only brands but also lifestyle magazines and general press are familiarized with these terms on the news.

5. Conclusions, limitations and further research

1. Conclusions

The study aimed to provide insight into visual merchandising in fashion retail. The results imply that to comprehend VM as a communication tool of brand identity in fashion sector implies an understanding that product change requires changing VM; if VM were strategic for companies, more budget and personnel would be authorized. Therefore, it is suggested to the companies a long-term plan on visual merchandising strategy (Niazi, Haider, Hayat, Hayat and Ul Hasan, 2015). Brands that neglect brand identity in retail also overlook the intangibles so much appreciated in aspirational sectors, such as fashion, and lose control of brand distributed through

multichannel systems. For these reasons this investigator is in accordance with Lea-Greenwood defining VM as “the first and most important element for retailer” (1998, 2013).

The finding implies that VM must be considered from the Communication Department as a main source for maintaining coherence. The continuous reference to company values exemplifies VM is a strategy as does the style (the look & feel), positioning and as such the confidentiality of the information during the interviews. This data leads to the conclusion that brands which take into account VM are among the most highly sold and highly valued brands.

A second conclusion is that VM contribute to the creation of emotions in textile retail. We agree with Maehle, *et al.* (2011) that the personality measurement scales include the emotional dimension. The study of VM is especially interesting in a hedonistic and recreational consumption context, and in a product, such as textiles where they take precedence within symbolic benefits and the perception level is very high. From the research, the need to measure perceptions is suggested.

Because every visual merchandiser says that his job consists in improving brand image and increasing sales, we can conclude that the visual merchandiser’s knowledge of consumer’s answers is a priority. Although firms’ scientific methodology is not managed, it is clear that there is a constant updating of store image. This is based on the issue that visual merchandisers (constantly) ask themselves – that is, whether or not the store elements “work”, or, if they have made the product sell it.

Besides the beneficial effects of the ‘retail branding’, it is necessary to emphasize that we cannot attribute to VM an exclusive relationship of cause - effect with the personality of the emo-

tional brand, since they influence other variables at the moment of creating the customers’ perception of the marks, for example, price, advertising, events, websites and even e-tailers.

Which VM elements best communicate emotional value? There is no one criterion to exemplify a classification of retail elements that are also VM elements, nor is there a particular vision about the elements that form VM. That is, diversity found (among the broad range of businesses) shows that VM contributes to build brand image. Besides, findings in VM research suggest that intuition is most often applied, except for cases like the British firm Next, studied for more than ten years by Grete Birtwistle and her team at Glasgow Caledonian University. The kind of investigation to be considered when interpreting the interviews comes from questionnaires in the store focused on consumer preferences, i.e. Hoss Intropia, or observations before and after being exposed to store windows displays.

What can be concluded is that the variation of VM’s emotional capacity in fashion retail depends on four criteria: season, distribution system type, consumer motivation and usage context and consumer situation. Therefore, brand image in an outlet system could lose coherence when communicated by VM in a store of the same brand situated in retail. However, department stores could vary in this regard to their own brand in their own retail store.

The multisensory experience finds VM one of its main partners allied demonstrating the interaction with current textile consumer’s profile. But it is always understood in a complementary way with some other contact points that also provide consumers the possibility to participate in brand (co-)creation.

Finally, the study makes important contributions to practitioners. In relation with the objec-

tive to evaluate if VM is an essential tool for textile retail brands, historic development illustrates that VM is a discipline that has evolved in the textile sector, becoming especially relevant nowadays. This study suggests managerial implications for building brand personality dimensions, and particularly, for revealing whether emotional dimensions are reflected through retail. For a brand that needs to be perceived as emotional, retail marketing should focus on emotional elements.

Therefore, VM is non-invasive compared to the saturation advertising, and can find a more receptive consumer. The store continues being a useful space for increasing contact with consumers through the five senses and for attracting consumers bombarded by multiple messages. As a managerial recommendation, taking into account the high costs to reach audiences through conventional advertising (and during the current crisis), it is apparent that VM is efficient and not especially expensive.

This research about offline stores can be useful for online shops. The Internet has also understood the need to animate consumers through a simple and attractive design of website attributes in order to win a positive “word of mouth”, and to transfer the experience through offline retail despite being less attractive as fun and social. Jayawardhena & Wright’s (2009) scale is interesting for measuring aspects that influence the emotions of online shoppers, and highlighting website and merchandise attributes among store image attributes.

Retail’s bases are established with this work assuming that offline behavior is the strongest predictor of online shopping. This phenomenon can be explained because competitive advantage based on design atmospheres is not possible for retailers that only sell on the Internet. A website

cannot reach all consumer’s senses as an atmosphere when the consumer is physically inside the store. Reaction to store atmosphere is a very strong influence on consumer’s perceptions about merchandise quality.

2. Limitations and further research

From a conceptual point of view, we have reviewed the bibliography in both the Spanish and English languages. The great majority have been in English due to its major development in the United States and England, whereas it has not in any practical sense been studied in Spain. It can be assured that further investigations can extend the findings of this study by completing more recent VM aspects in other relevant cities such as Milan, Paris and Berlin, and the origin of VM in each of them.

Another limit resulted from the study – and briefly mentioned throughout it – is to study some aspects of retail that explain the link between VM and emotions: brand personality, store personality, and the multisensory experience. We acknowledge that some other associations could be selected, such as user imagery, the country of origin and symbol; other points of view such as cognitive experience that are more connected to functional than emotional benefits; and some other aspects that influence in the retail experience. For example, it should be interesting to approach the product personality itself, the influence of salespersons’ service quality as Penz & Hogg (2011: 110) note, and the psychological consequences of commercial architecture, as Kent highlights (2007). Another example to investigate the relationships between aesthetics and consumers reaction is the study of female consumers that evaluated the quality of apparel products guided sensory, emotional and cognitive dimensions (De Klerk&Lubbe, 2008).

To confirm the emotional contribution of VM in a balanced but a significant way, the empirical research has taken as a source of knowledge the interviews with VM professionals from five fashion retail brands with a strong presence and relevant market share, and with eight selected national and international academics and professionals of VM. To depict a wider perspective, the methodology was intended to extend into other brands. However, two difficulties were encountered: obtaining sensitive information related to the business core; and the availability of the visual merchandiser's – which implies a lot of visits to store (Morgan, 2008: 24). A proposal to provide a holistic point of view would be to perform interviews with the VM's professionals individually, or in focus groups with professionals whose professional activity is related to VM: architects, brand managers and store managers. We cannot make room to this interesting research because this line of activity oversteps our primary purpose.

Even though this research provides a complete approach of VM as a communication strategy, the methodology has directly focused on the brands' point of view, and indirectly on how VM is perceived by consumers. The proof is the continuous allusions of VM professionals to consumer's feedback. It would be necessary to perform a comparative study between perceptions of VM attributes and store image of the same fashion brand in different cities in different countries. Cross-cultural research would deduce a cultural feature, for example, of how English culture weighs the quality of sales personnel.

Therefore, it would be interesting to do another comparative study of VM's influence in different distribution systems, from department stores to shopping centers, outlets, and online stores. In the same way, different methodologies

are suggested to assess consumer perceptions. Store image could be analyzed. This aspect is the key because it is necessary to measure whether brands truly create a memorable experience on consumers, as companies say. At this point, it is difficult to isolate brand perception as a result of VM activity from the perception that consumer forms due to other communicative efforts, such as advertising, promotional marketing, direct marketing and public relations. A positioning study based on store image (considering brand as a person in mind) would complete traditional positioning studies based on product attributes (from brand as a product point of view). And, it would demonstrate that consumers make decisions based on self-expressive and emotional benefits, not only functional benefits.

VM's capacity to make a brand emotional can be measured through the emotional impact of VM attributes. Some projects and possible research methodologies have been suggested. First of all, employ a method that considers each one of VM attributes and the senses affected. This method should find a way to collect consumer perceptions about VM in a holistic manner. It makes no sense to measure each attribute an isolated way from the remaining store attributes because they will never be perceived as such. Moreover, if this method is used, consumer profiles will be considered. The current study has found that are significant with at least the following variables: if the consumer is fashion conscious or not; if they shop retail off line or online; gender; if the consumer has bought or has shopping intentions; and if consumer buys mass market or luxury. The first variable quoted influences directly and decisively in order to receive information about VM attributes, as the more conscious one is of the sector, more attributes will be identified.

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Anexo

PLANTILLA ENTREVISTA VISUAL MERCHANDISER

1. Perfil del “visual”: formación y años de experiencia.
2. Funciones de su trabajo en el día a día: ¿es un gestor del punto de venta que repone o aplicar sofisticadamente programas de gestión; es el artista que presenta visualmente el producto; o es quien crea y comunica constantemente el concepto de tienda y la imagen de marca?
3. ¿A qué atributos da importancia trabajar si dependen de Ud. y si no dependen, de qué manera le influyen o condicionan?:
 - a. Localización, formato o diseño de tienda, arquitectura.
 - b. Escaparate.
 - c. Diseño interior y ambiente (luz, música, color, otros clientes).
 - d. Staff.
 - e. Disposición de la mercancía.
 - f. Comunicación (publicidad y relaciones públicas).
4. ¿En qué medida traslada los valores de la marca a estos atributos?
5. ¿Tiene una visión creativa (estética) o estratégica: ¿de enfocar las directrices, de transmitir la imagen de la marca y de tomar decisiones de forma integrada con los directivos de la empresa? A quién reporta: ¿al director de marketing, al director general, al director de comunicación o al departamento de ventas?
6. Denominación del puesto de trabajo: ¿departamento de visual, escaparatasta senior o junior?
7. Tamaño del equipo: los académicos (Morgan, 2008) otorgan las siguientes funciones según el puesto de senior o junior. ¿Es así en su empresa?
 - *Senior*: Para garantizar la adecuada calidad y representación del producto en la tienda, el *senior* está en contacto con toda la plantilla: se reúne con las marcas y les sugiere tendencias, sirve de enlace entre gerente y director de planta, coordina a los diseñadores y forma tanto el personal de planta como al visual junior.
 - *Junior*: Realiza las funciones del *senior* pero con el personal de planta.
8. Relación con otros departamentos y actores del visual: ¿con quién trabaja?
9. Investigación sobre la influencia del consumidor ¿tiene inputs del cliente? ¿Qué técnica de investigación propia o ajena se lleva a

cabo sobre las percepciones del consumidor, cómo se utiliza esa información, y en qué dimensiones influyen más a un determinado target —de edad o sexo por ejemplo?

10. ¿Son distintos los trabajos del visual que se preparan en función de la cultura—ejemplo UK/España/Japón, o de qué modo se adaptan?
11. ¿Cree que es una disciplina o posición reconocida en la empresa y en el sector de la moda? ¿Hay freelance trabajando para la marca, independientes y especializados (en interior, exterior o estilismos de moda), para proyectos aislados como la renovación del ambiente de la tienda?
12. ¿Qué lugar ocupa el visual en el presupuesto de la marca, entre otras partidas: diseño, producción, distribución?
13. Respecto del primer criterio para aplicar el VM (el sistema de distribución): ¿De qué manera influye el modelo de distribución *retail* al VM?
14. Respecto del segundo criterio para aplicar el VM (la categoría de producto): ¿qué es lo específico del VM en el sector de la moda, aunque los visual se convierten en expertos independientemente del área en que trabajan, pues en su carrera es frecuente la rotación de establecimiento y la elevada estacionalidad?
15. ¿Hay una supervisión o seguimiento del visual en las tiendas? Los académicos (Morgan, 2008) hablan de una lista de control que abarca aspectos como “la planificación, presupuesto, sesiones de formación, inventarios de material reutilizable, seguridad, posibles reacciones de los consumidores o localización del mensaje clave y de los puntos focales”. ¿Se emplea a menudo o se trabaja de forma más intuitiva?
16. La primera asociación de VM que sirve de referencia a los profesionales dedicados en España a su puesta en práctica, es Retail Design Institute. Actualmente RETAIL DESIGN INTERNACIONAL es una iniciativa para “que el retail ocupe el lugar que merece, sin ánimo de lucro y al servicio del retail en España, con las mejores prácticas de retail”. Da especial importancia al VM, recogiendo en informes, jornadas y publicaciones las mejores prácticas. ¿Tiene allí presencia los VM de la marca, o no interesa esta repercusión?