

IMPACT OF VISUAL MERCHANDISING ON BRAND PREFERENCES IN FAST FASHION RETAIL: AN OVERVIEW

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ABSTRACT

The study aims to draw on existing knowledge and investigate the impact of multisensory elements of visual merchandising on creating subconscious preferences. The research, coupled with the existing gaps in the literature, has generated several questions that researchers have attempted to answer. *For the same*, the study utilizes qualitative research as it relies on the results from Zaltman Metaphorical Elicitation Technique (ZMET). The research allow to reach the deep-lying metaphors in the subconscious brain of the respondents. The present study is the first of its kind which integrates the cultural backdrop, antecedents and consequences of the relationship between visual merchandising and brand preferences.

KEYWORDS: Visual Merchandising, Fast Fashion Retail Industry, Brand Preferences, Zaltman Metaphorical Elicitation Technique, Multisensory Brandin.

JEL Code: M0, M3, M39.

INTRODUCTION

From the very beginning of retail, the store was imagined to be a basic transactional marketplace. The buyer and seller used to meet in the store where the exchange used to take place. The principle of caveat emptor, which means "let the buyer beware" was used as the underlying principle of any trade transaction (Chau, 2011). Over the years, with the advent of consumerism, organisations became more consumer-centric. In the early twentieth century, retail was boosted with better connectivity (Rigby, 2011). Once far off towns on the outskirts of a major city were now connected with roads. Customers could, now,

travel from their homes to those places on their weekends. Often, we discounted the importance that connectivity played in increasing consumerism. In the mid of twentieth century, the level of competition increased in the fast-fashion industry. Fast-Fashion today has become a rage, especially amongst the millennials and young adults. Visual Merchandising Display disproportionately takes a major part of marketing budgets for Fast-Fashion brands. Top-Shop stores for example are known to be a sanctuary of their own.

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Global retail brands completely changed the entire meaning of retail when they made the entire experience more emotional than transactional. These brands turned their emphasis toward creating stories around the entire shopping experience. The brands started decoding the real meaning of shopping as an activity and how humans think. At least 95 per cent of all the cognition occurs below awareness in the shadows of the mind while at most only 5 per cent of occurs at the higher-order consciousness (Zaltman, 2003a). At the beginning of the new era, in-store communication became a key differentiator in creating a positively differentiated subconscious preference of an apparel brand in the mind of the shoppers. The fast fashion industry has grown at the rate of 16% as against the luxury fashion that is fighting a battle with the right brand positioning (Sachs, 2017). Visual merchandising means bringing the retail brand to life and dramatizing the merchandise offered. Consumers are looking at the crowded retail shelves; they often just chose the product that best catches their eye-much of this decision making happens at the subconscious level. Most of the apparel brand positioning mix is extremely similar. In such a scenario, in-store communication can be a very important medium as it not only creates a differentiated subliminal perception but also creates a preferred brand identity in the minds of the consumers. Finally, there are also impulse purchases in the store that were not planned at all-more commonly observed in the FMCG (Fast Moving Consumer Goods Category). In most of the western economies, the number of unplanned purchases accounts mostly around 70-80 per cent of the purchases (K.Venkateswara Raju, 2015).

Contemporary research in apparel retailing is indicative of the fact that in the twenty-first century, fashion and luxury brand consumption is an aesthetically pleasing consumption, by

adding meaning with visual merchandising techniques able to almost transform branded products into product artwork (Logkissidou, 2016). The in-store experience now must play to the inherent strengths of brick-and mortar stores-the visual, tactile, the surprising drama, the convenience, the new and the experiential environment. The bricks and mortar retail is just going to grow in the future along with Direct To Commerce or D2C to create a phygital (physical+digital) omni channel experience. The top retailers will integrate the online and offline channels to supercharge the consumer's. Visual Merchandising Display means how the products and assortment is the arrangement and includes sensorial experiences such as smell, lighting and other such experiences. It is a function that comes under the design team, but its impact on business is more strongly controlled by marketing and brand management functions.

LITERATURE REVIEW

The investigation of the research revolves around the area of consumer buying behaviour, shopper marketing and VMD. Therefore, the literature review covers all three topics with focus on brand preferences. The following keywords have been used throughout the research study

1. Visual merchandising (VM)

VM is the art and science of presenting products in the most appealing way. VM is the "language of the store"-it is how a retailer communicates with the customers through product images and presentations (Garaus, 2011). With a good merchandising strategy, the products almost sell themselves. A study carried out by American Marketers Association confirms the same-the effect of visual merchandising for CPG (consumer packaged goods) found that the impact of merchandising in brand

switching was approximately 15-30 % by the same study.

2. Store atmospherics and multisensory branding

Retail atmospherics involve all details of a store’s physical environment and the effect on customers. The social atmosphere is designed in terms of music played, clintal, lighting and most importantly, the retail service is projection of the store’s corporate image.

3. The extended self, attitude, and values

Identity conflicts are a regular part of our integral lives, yet seldom is known to us about the different identities that exist within ourselves. Consumers unconsciously know that their possessions are intimately tied to their sense of the self (Goffman, 1959). The extended self-concept basically means the beliefs a person holds about his or her attributes and how he or she evaluates those qualities. It has been

divided into two parts-the inner self and the external self. We show the inner self to almost no one except the family members. The latter self or the outer self is a feature that we show to our friends and everyone else that we interact (Belk, 2014).

4. Fast fashion retail

Fast fashion is a contemporary term used for fashion marketing to express the designs move from catwalk quickly to capture the current fashion trends (Bruce, 2007). The emphasis in fast fashion retail is on cost optimization and achieving supply chain efficiency. The philosophy of quick manufacturing at budget prices is the used by large global retailers such as Forever 21, H&M, Zara, Primark & Topshop. The efficiency is achieved through retailers understanding of the TG and respond their dynamic fashion needs at real time basis (Muran, 2007).

Brand preferences	There has been no research that measures the relationship between VMD and Brand preferences.
Key Performance Indicators (KPIs)	There are no KRA and KPIs to study and evaluate the effectiveness of different displays.
Understanding the VMD of Fast Fashion Brands	VMD specifically for global fast fashion retailers is the most important form of communication. Currently there are gaps in studying visual merchandising and display in the area of apparel retail.

HOW CUSTOMERS THINK

Humans are extremely emotional organisms at their thinking core. They feel that they make rational decisions, but it is their emotions that make force their rationality to be in tandem with their values, beliefs, and attitudes.

Metaphors exist as networks of abstract thought and understanding that constitutes mental imagery. Brands prime consumers to elicit preferred metaphors and certain thoughts in the mind. of the shoppers (Zaltman, 2007b). To support the same modern research techniques such as FMRI (Focal Magnetic Resonance Imaging)were used. It is a focal

therapy that provides the maps of human brain function with high spatial and temporal resolution (Jackson GD, 1994). Neuroimaging can be a cost-effective way of evaluating alternative concepts of VM in retail settings. In an experiment, the imaging studied showed increased activity in the brain areas associated with positive and negative emotions, storage and retrieval of information, and with the predicted activity in visual cortices, suggesting that consumers could readily visualize the proposed alternative retail scenarios (Zaltman, 2003). At first, we presume that the thoughts originate from the mind. Cognitive neuroscientists Steven M. Kosslyn and many

others suggest our conscious and unconscious thoughts.

Case: The accident that changed the understanding of the human brain

Something unheard of before happened in 1848 with Phineas Gage, 25, who was a foreman of a crew cutting a railroad bed in Cavendish, Vermont. One afternoon, as Phineas Gage was using the tampering iron to pack the explosive powder, the powder detonated. The tampering iron that was 43 inches long, 1.25 inches in diameter and weighing 13.25 pounds shot skywards, penetrated Gage's left cheek, ripped his brain and exited through the skull, landing several feet away (Twomey, 2010).

Phineas Gage miraculously survived the accident. However, his injury made a permanent impact on his mental cognition. His friends and acquaintances said that he was "no longer Gage". The damage to Gage's frontal cortex resulted in the loss of social inhibitions.

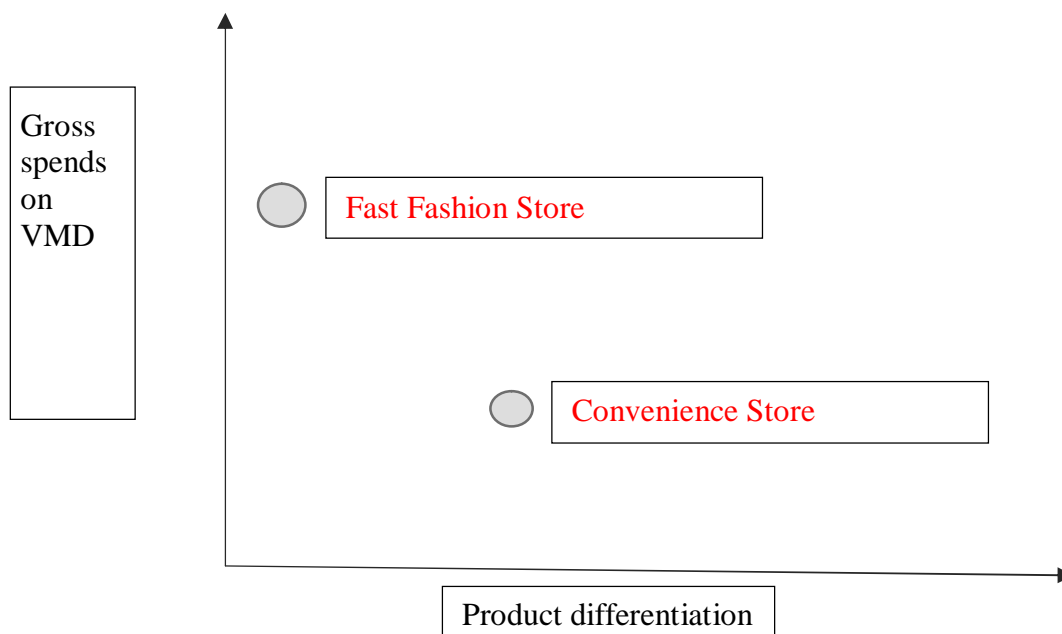
A team led by Jack Van Horn of UCLA created a new digital model of the rod's path. It suggested that the damage to the Gage's brain was more extensive and severe than previously been estimated: up to 4 per cent of the

cerebral cortex and about 11 per cent of the total white matter in the frontal lobe was destroyed (Big Picture, n.d.). The model also indicates that the accident damaged the connection between the frontal cortex (conscious brain) to the limbic system (subconscious brain).

From that point onwards, research in the areas of neurology and consumer buying behaviour intensified as the researchers started their investigating the impact of the subconscious and conscious brain, as two different hemispheres of the brain, on mental cognition.

VISUAL MERCHANDISING AND SILENT SELLING

A super-specialist store is one that has a retail positioning mix in a corner where there isn't much competition. A department store is one that has a variety and range of goods. For specialist stores, marketing spends on visual merchandising are generally higher than that for a generalist store. In the diagram below you can see how the spending on VMD increases when the brand positioning moves from a generalist (convenience store) to a specialist (fast-fashion store) store (Zaltman, 2003c).



This picture explains that when the points of differentiation increase in the brand positioning, the spending also increases in the display of that merchandise. In the figure, departmental apparel stores like Macy's will have high spending on VMD; however, another grocery store down the same aisle will not spend equally on the display of fruits and vegetables. VMD can also be leveraged to create stronger brand equity for the organization.

VMD attempts to convince the shoppers of the value associated with the merchandise. In addition to selling actual merchandise, the display can also be used for the introduction of a new product, increasing footfalls and the average time spent in the store (Pegler, 1983a). Visual Merchandising creates a multisensory experience for the buyers who tend to take mental shortcuts (heuristics) to taking quick decisions. Therefore, it is necessary to understand multisensory branding.

Multisensory branding has become an integral part of shopper marketing. The new and burgeoning field harnesses the power of the five senses to connect, engage, excite, and inspire the shoppers in their path to purchase. The five cases below give a multisensory snapshot.

- Massimo Dutti, the high-end retailer under the Zara Inditex group, removed all their metallic lighting display on the store window and replaced them with paper pendant lamps to create a joyous and organic atmosphere, which enticed the people to move into the store. The pendant lamps were manufactured and designed by In mark from India.
- The most powerful manifestation of sound can be found in music. Abercrombie and Fitch (A&F), positions itself as a fashion-oriented casual brand aimed at aspirational consumers (15-28 years) desiring an

American college lifestyle. They carefully tailored their in-store music to match their TG and create a sound scape that was in close harmony with the brand strategy fit—that's the harmonious alignment of the shopper's first-hand perception with the prior expectations of the brand.

- Smell traps directly in the emotions, memory, and subconscious mind. Supré an Australian based fashion retailer targeted towards 14-28 years old females is one example. A pleasant vanilla smell paired with loud music was found to exert a positive influence on the emotional state of the shoppers (Stählberg, 2009).
- Apple's flagship store encourages tactile and personal engagement. The smooth and clean lines echo both the stylish and neat image of the brand. Apple seating encourages shoppers to linger and mingle in the store, and an edged and curved handrail invites the touch, of a glass staircase.
- Taste can be tricky to integrate into a campaign and many brands shy away from their. Our senses play a key role in memory encoding, and sensory experiences do not always conscious information processing. A lot of hypermarkets carry a secondary placement of chocolates and gums around the billing counter. This is done to increase Units Per Transaction (UPT) and induce the sensation of taste at the time of billing which can be an unpleasant experience for the shoppers.

SHOPPER MARKETING-COHORTS AND PERSONAS OF CONSUMERS

To provide a better handle on the complexity, the council created a series of personality mindsets that seem to define the moods better (Maila, 2012). It is imperative that traditional segmentation or creating target groups really don't work in shopper marketing; it is rather

the target person or the individual that needs to be empathized with before creating store sales strategy. Those target persons are the keeper, quartermaster, banker, seeker, desperate shoppers, reluctant shopper, bargain

hunter, courier, and hungry shopper. The table below elaborates in the common personality traits exhibited by each one of them at a marketplace.

Table 1. Segmentation of shoppers by Ståhlberg

Keeper	The person who takes the responsibility of providing for the household through food shopping. These people enjoy shopping and enjoy their responsibility
Quartermaster	They view the task of grocery shopping as a chore and a disliked chore. The keeper is far easier to satisfy because he or she is prone to like the entire store experience
Banker	A budget mind shopper who knows that the family must be fed with a specific budget. He often applies the cost-benefit analysis for most of the shopping decisions.
Seeker	This shopper is always looking for new ideas, new tastes, and new products. For this group, shopping is a journey of discovery.
Desperate shopper	They need things instant. They believe in instant gratification. If you don't have that specific item, the shopper could be lost forever.
Reluctant shopper	If reluctant shoppers could hire someone to do the task they would.
Bargain hunter	Price is the sole priority for them. This shopper is on a price mission.
Courier	They're doing small grab and go trips. In fact, many shoppers become this shopper during the week, when they're running those fill in trips that dominate the aisles.

For each of the cohort, different marketing strategies are useful. Often for a same product there could be a different customer and consumer. For example, a mother (customer) could buy instant noodles for her son (consumer). In such scenarios, two-pronged marketing and advertising strategy needs to be formulated to create recall in minds of customer and consumer.

THEORIES USED FOR THE RESEARCH

In the literature review, the authors use different terminology to describe roughly similar phenomena. Some of those theories have been listed below

- *Signalling theory* which states that "expenditure on VMD serves for both consumers and sellers as a signal of high image and luxury value that transmits the message that the product that is on display

has a perceived higher value. (Kirmani, 1993)

- *Inference theory* states that consumers search to form a perception about the unknown/new brand on display based on the information that they receive from VMD. (Masuda, n.d.)
- *Contagion theory* that consumers transfer perception of VMD cues such as fixtures, materials, and mode of display, from the product at display and its presentation (Hagtved Henrik, 2011).
- *Associative network theory* states that information is filed in the consumer the consumer's memory and is activated in relevant context to determine their attitudes and behavior towards the brand (Houston, 1983). Projective techniques are a common marketing research methodology in which brands try to decode the associations and personalities of their brand identity.

OBJECTIVES AND HYPOTHESIS DEVELOPMENT

OBJECTIVE AND MOTIVATION OF THE STUDY

The purpose of the study is to identify and measure the impact of VMD on the purchase intention of the shopper. The study will aim to investigate and understand the motives and triggers that lead to the creation of brand preferences in the mind of Indian shoppers. The study is limited to metro cities of India. Here are the demographics of the respondents for the research -:

- NCCS A1, A2, A3; CL-95%
- Sample Size / N = 20
- Geographies-Delhi, Mumbai, Bangalore, Ahmedabad, Kolkata and Chennai
- Research Methodology-Multi Group Discussions (MGD), In-Depth Interviews (IDI) based on Zaltaman's Metaphor Elicitation Techniques (ZMET)

The consumer journey has become ever more intertwined and convoluted. Research for the product can start from Instagram and on the path to purchase there could be moments of truth on blogs/websites. During the research, the machine would notice an intent to purchase, and Supply-Side Servers (SSP) would keep serving retargeting ads to consumers. The final purchase could happen either from the manufacturer's website/ app, marketplace, or retail store. In such a convoluted journey it's become interesting to understand the evolved role of in-store display and merchandising.

Stores are no longer the end of the customer funnel; they're concepts and environments that help people understand the brand. To make a successful career in retail, the management students need thorough understanding of retail with understanding the impact of VMD on the

action to purchase and the brand preferences in fragmented categories such as apparel retail.

Existing literature on visual merchandising, store display, shopper marketing, and retail marketing has been used for the present study. However, there are also gaps in the extant research on the topic, which with the researchers' call for further research has motivated my interest to empirically investigate the impact of VMD on the shoppers' brand preferences in the space of fast fashion apparel. Earlier studies on VMD are around the best display formats for the retail store with a focus to increase footfalls and increase the time spent in the store. There is a focus on the window display, color and texture, lighting, merchandise presentation, display techniques, floor plans, signage, and point of purchase display (Pegler, 1983b). Such studies don't provide any guidelines for retail strategy because they don't study the impact of such arrangements on the shoppers' perception of the brand. VMD is looked upon as a creative field, whereas it should be practised as a part of brand management. The more recent studies on shopper marketing study the strategies to increase the purchase decision at the point of sale. Shopper marketing explores the subject of focused marketing initiatives at browsers and shoppers who are in-store and can be influenced in their final decision (Maila, 2012). The research fails to connect the same with brand equity and preference.

HYPOTHESES DEVELOPMENT

The present study attempts to study the relationship of the subconscious impact of high image VMD cues on the preference of three fast fashion brands-Forever 21, H&M, and Zara. All three brands are considered close competition in the space of fast fashion retail. The former pioneers of fast fashion seem like dinosaurs in today's world as newer D2C brands such as Shien, ASOS, Boohoo, and Misguided

swoop in and cut their supply chain processes down to as little as one week. This study applies the theory that 95-99% of shoppers' cognition occurs in the subconscious of the consumers. Many consumers report handling competing brands and comparing prices at the point of purchase; however, observations of the same reveal that they don't look at alternatives to the chosen brand (Mahoney, 2003).

This study aims to provide the following hypothesis

H1: VMD and store atmosphere directly impact the preference of a brand in the mind of the shoppers.

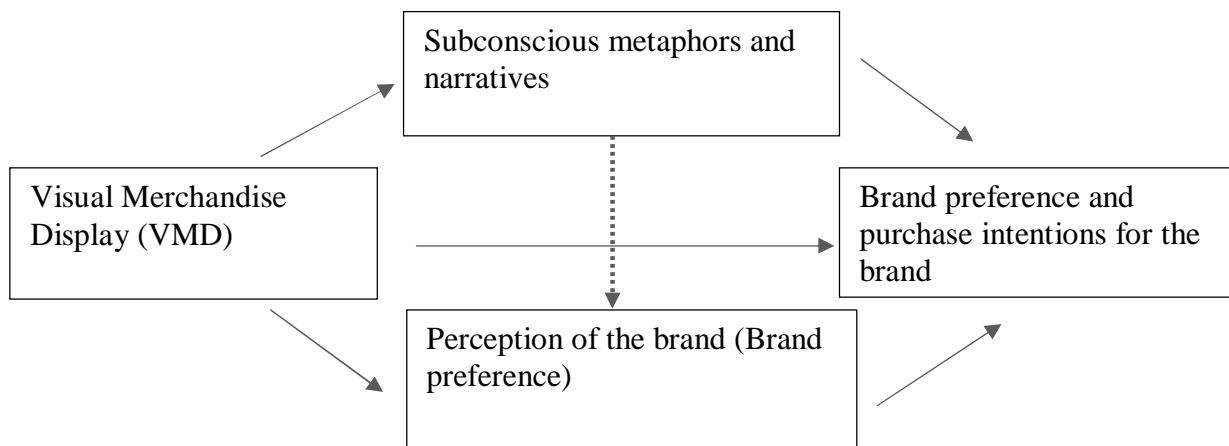
Apart from the primary hypothesis, there are other topics as well that the research intends to investigate

H2: VMD and store atmospherics create a distinctive brand narrative in the subconscious mind of the shoppers

H3: The multisensory elements in a retail store have a measurable impact (can set KPIs/ KRAs) on the purchase intentions of the shopper

To understand the impact of the shoppers' brand preferences for fast fashion apparel brands, the present study relies on Mehrabian and Russell's (1974) stimulus-organism-response (S-O-R) framework. The figure below gives the conceptual model for the purpose of the study.

S-O-R FRAMEWORK USED FOR THE RESEARCH



This model explains how VMD impacts the brand preferences and purchase intentions through the influence towards exposure to some subliminal cues. The S-O-R framework can be seen as follows

1. Stimulus: VMD and store atmospherics.
2. Organism: The shoppers (feelings of excitement) were described as 'organism'.
3. Response: Willingness to enter or avoid a store because of the VMD and store atmospherics was seen as a response.

The study adopts the hypothesis that shoppers' preferences and decisions are heavily impacted by the new paradigm that re-establishes the connection between the brain, mind, and the social world. The 3,00,000 years since the time we walked on earth is a very short time for evolutionary time span. Modern humans and chimpanzees share some 99 percent of their genetic material (Tomasello, 2000). Social and cultural transmission works exponentially faster than organic evaluation. People tend to think of memory as a snapshot of an experience that can fade over time. However, if we view the

human experience as the intersection of mind, brain, and society, then the memory becomes a creative product of our encounters, beliefs, and plans (Zaltman, 2003d). If a snake creeps past a boy playing on grass, he would get scared even though he would have never witnessed a snake before. It happens because the paranoia is coded in the genetic DNA. The creative product develops at a preconscious level; we are not aware of its development. Consumers may sincerely believe their own stated thoughts but may not consciously understand the opposing forces that drive their behavior.

RESEARCH METHODOLOGY

The first objective was to prime the respondent and make them empathies with the formulated hypothesis for the purpose of the research.

Do VMD cues sublimely form the perception of a fast fashion brand in the mind of the shoppers? Is the same perception affect their purchase intentions favourably?

Although there is one main research question, the present investigation has several research objectives, which are outlined as follows:

- The first research objective is to identify how VMD and store atmosphere directly impact the preference of a brand in the mind of the shoppers.
- The second research objective is to find the subliminal perception of the fast fashion

brands-Forever 21, H&M, and Zara in the mind of the shoppers

- The third objective is to explain “why” the shopper’s presentation of merchandise and store atmospheric over another.

PRIMING EXPERIMENT AND RESEARCH

To probe deeper, an experiment was created in which the researcher asked the respondent about the last time when they visited a doctor. More questions were asked such as “what was the name of the doctor” and “were you satisfied with the medical services that you received”. In the second part of the experiment, the respondent was shown a collection of alphabets “u-r-s-n-e”; the task was to create a meaningful word with the collection of alphabets. All the respondents created the same word “nurse”. The probing questions in the first stage of the experiment ensured that the respondent elicited certain images of the hospital, doctor, and ambulance in their minds. The respondents were primed to create images around the same in their subconscious; therefore, they immediately created the only meaningful word “nurse”. To verify the results another set of respondents were shown the collection of alphabets directly. The time taken didn’t only increase, but some of them couldn’t even create a meaningful word in each limit of 100 seconds.



Experiment 1. Priming the respondents

Marketers must develop and use research methods that dig deeply into the mind of the market by taking new approaches as improving the old ones. Traditional quantitative and

qualitative methods work well in several circumstances: when managers have substantial brand and category knowledge. In topics of research that measure brand equity and

preference, brand managers need methods that go beyond what the customers can readily articulate (Zaltman, 2007e).

ZALTMAN METAPHORICAL ELICITATION TECHNIQUE (ZMET): QUALITATIVE RESEARCH

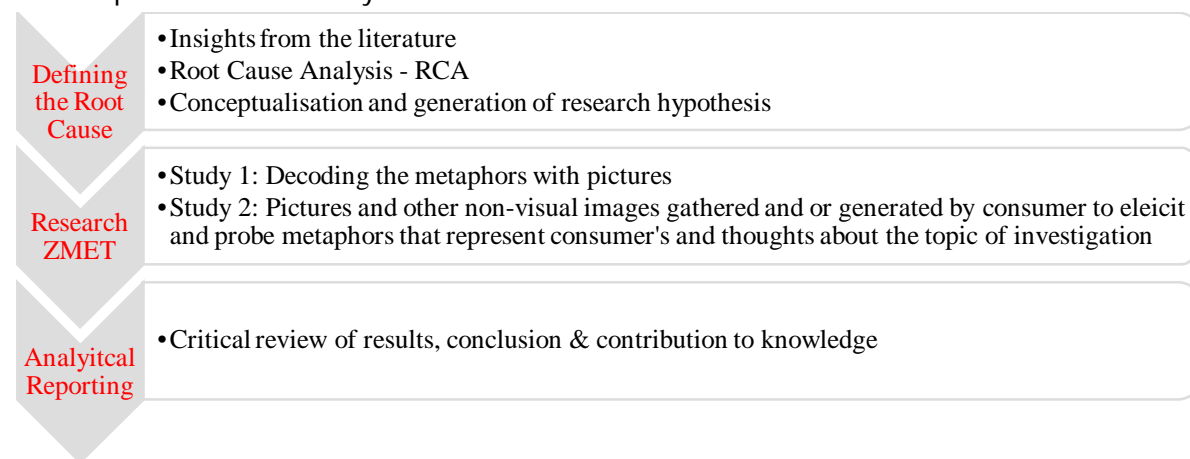
The study was divided into three stages. ZMET was the only tool that was used for the research. Managers need to base key decisions on a deep and thorough understanding of the current and potential customers. Such an understanding includes insights about customers' tacit or hidden thoughts and feeling as well as those that are more explicit and readily expressed (The ZMET Research Process, Harvard Business School, 1998). ZMET is derived from a synthesis of approaches drawn from neurobiology, psychoanalysis, and psychology literature (Predeaux, 2013). It was developed for brand research and new product development by Harvard Business School professor Gerald Zaltman. Participants in the research were shown the VM display of Forever 21, H&M, and Zara stores from Delhi, Mumbai and Ahmedabad. Post the interview, the participants were given seven days to collect 10 pictures that represented each of the brands for them. In the next interview, the respondents were quizzed around the "why" of each of the pictures rather than the "what". This helps in the discovery of the hidden

meaning in the pictures. ZMETs use of pictures as the medium of data collection is based on the premise that most human communication is non-verbal. Zalcman found out that pictures contain metaphors that may be visual, verbal, mathematical or even musical (Zaltman, 1997). In the second study, there were following stages

In first stage, participants were asked to tell a story behind every picture that they had brought to the interview. Storytelling presents a good opportunity for uncovering relevant information about the topic. ZMET interview manual advocates starting the interview with the following statement:

"I am going to be asking some seemingly strange questions, asking for clarification of your comments and explanations of ideas that you think should be obvious. Just imagine that I am from another planet and I don't understand much about the topic or people. So I am going to ask a lot of questions. This is just a part of our process, so just bear with me."

In the step 2, the involves interviewer asking the respondent if there were any other pictures that respondent was not able to find. Description of the missing image also enables the respondent to expand on his or her thoughts and feelings as if the images were available.



Flow chart 1. Flow of the research used

In step 3, the participant is asked to sort the pictures into meaningful piles and provide a label or description to the pile. This step is useful because it establishes constructs or themes that are relevant to the consumer

In step 4, Kelly repertory grid was used to identify new meaning, concepts, and distinctions. The Kelly repertory grid is described as a method of exploring other people's personal construct system (E Fransella, 1977). It attempts to see the world in a way that other people see it.

In step 5, the respondent was asked to select the picture that was most important to the topic under the investigation.

In step 6, the participant was asked to describe pictures that might depict the opposite of the task assigned. This step of ZMET interview is designed to use negative case analysis as a criterion of evaluating trustworthiness (D Carson, 2001).

In step 7, the respondents' unconscious thoughts were brought to the level of awareness where verbal articulation as possible. In this stage, the participant is asked to use other non-visual senses (taste, sound, smell, colour, touch and feelings) to convey what does and doesn't represent the topic under investigation.

In step 8, the participants were used to create vignette, depending on the project's focus. To create the vignette, the participant was used to imagine a short movie that described their thought and feelings about the topic. For the purpose of the research 20 respondents from different walks of life from management to design were selected with great importance to the quality of the respondents for the purpose of the investigation.

RESULTS AND FINDINGS

The respondents were asked to collect minimum of 5 pictures that represented Forever 21, H&M, and Zara in their mind. In the table below the real display fixtures at store is compared with those that respondents associated with the brand. The truth is that attitudes and concepts of the merchandise display vary store to store and even city to city. For the purpose of the research, selected pictures were shown from all the three brands across selected stores from Delhi, Ahmedabad, and Mumbai. All the findings from the Stage 1 of the ZMET interview are listed below -:

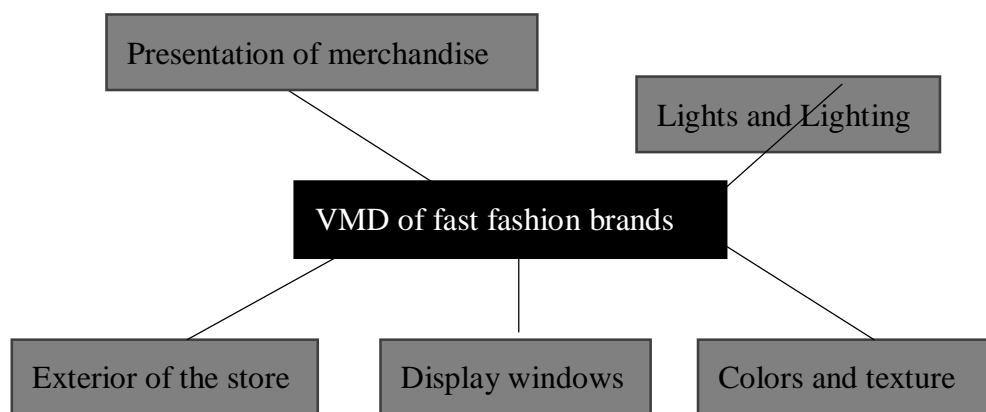
EXTERIOR OF THE STORE

The store's sign, on the outside of the building, makes the first impression on the store. It sets the look and image of the store.

Forever 21: Most of the Forever 21 had a clearly visible store sign in proportion to the store façade.. In the Indian flagship store at Select Citywalk, New Delhi, the lights were draped around the logo to increase its visibility from a distance. Some of the stores had minimalist planters that created association with good neighborliness, its friendliness in being a part of a community.

*H&M-*Their sign seemed like the signature of the brand-personal, original, and recognizable.

*Zara-*The outdoor lighting display elicited alluring images in the mind of the respondents. Lighting was used to create canopies in the window decoration to add a feel of a "luxury" holiday. The Zara store in Mumbai had awnings that just didn't supply a shelter during inclement weather, but also made window viewing more pleasing.



DISPLAY WINDOWS

This is the fun and creative part of the VM display. The floor of display for most of the stores is raised to about 8 to 9 inches. However, the standard raise of the floor is about 2 feet (Pegler, 1983)

Forever 21—One of the respondents answered “for the real drama and excitement in display there is nothing to compare with that you can do in an enclosed display in Forever 21”. One of the store has island window display—a merchandise presentation that could be viewed from any angle.

H&M—The display window is around 20 to 40 feet long at most of the stores. Often the display is divided by a visible thin metallic divider. The clean and neat display of mannequins in the window with warm white lighting evokes strong feelings of the Nordic designs in the mind of the shoppers. The sale window decals at the time of promotion attracts a lot of shoppers who have affinity towards H&M.

Zara—A long, run on, closed black window separated by metal mullions which hold the late glass windows. Each area carries a similar theme and a single ideas especially at the time of the shopping. Powerful side lighting added to

the subliminal value of the brand; people perceived the brand to have higher value as the lighting made them elicit images of an extremely hot and alluring model.

COLOR AND TEXTURE

For many customers this is more important than size, style, or price tag. Based on the research by Faber Birren the primary colors can be classified as following -:

Yellow—It is sunshine gold; happy, bright, cheerful, vital, full filled, and alive. It is optimism, expectancy, vital, and alive; creates strong associations with refreshing and organic lemons.

Red—Exciting, stimulation, loving, powerful and sexy. Generally, it comes as a reminder of the valentine’s day and Christmas.

Black—Connotes night, a vacuum and absence of light. It is mystery, sex, and death as well as the color of intrigue and sophistication.

Green—An alive cool and a “growing” colour. For most of the European people it remind them of the St. Patrick’s Day. Some of the respondents said the organic green of Zara reminded people of the grass from a playground in a posh locality.

Table 2. The primary and secondary colors of all the brands used for the study

Brand	Primary Colour	Secondary Colour
<i>Forever 21</i>	Yellow	Black
<i>H&M</i>	Red	White
<i>Zara</i>	Black	Green

LIGHT AND LIGHTING

There can be natural daylight and artificial light, which can be incandescent, florescent, or high intensity discharge lighting (HID). Great lighting with balance in shadows and highlights trigger piqued moments of imagination in the subconscious of the shoppers.

Forever 21–Daylight lighting usually associated with fluorescents. The high hat lights are visible across the top of the photograph. The need flash and sparkle makes the shoppers eye travel to specific shop in shop styled zones such as “21 men”, which is men fashion brand of Forever 21.

H&M–Warm white lighting that attempts to create an incandescent effect to the cool bluish. Some of the basic merchandise of H&M looks “scintillating” in warm white lighting as the disturbed vision moves towards the basics collection.

The lighting in the Mall of India store in Noida in Delhi NCR had used shadows on the mannequin to effectiveness. The shadow appeared to have a touch to complement the colour of the dress worn by each of the mannequins that moved the cluttered vision of the shoppers and created an excitement and inspiration for the product.

Zara–Most of lighting in the Zara stores is done by PAR bulbs that are high voltage bulbs. They can be used as a primary light source; most of the Zara stores have metallic lighting.

PRESENTATION OF THE MERCHANDISE

In all the three stores a butt rod and an ankle rod fitting were common for the presentation of the merchandise. The butt rod fitting (an attachment on the buttocks into which the floor rod is inserted so that the mannequin can stand), an opening has to provide in the crotch. The more sophisticated the merchandise is, the more abstract and non-realistic can be the presentation.

Forever 21–One of the respondents said that she was intimidated with the vast number of the choices available in the store, but others said that it was good to be updated with the fast changing fads from the world of the consumer that helped her to have chosen from a variety.

H&M–Some respondents quickly noticed the peculiar presentation style of the merchandise with a mannequin in the Ahmedabad store. Shoppers were quick to notice the hook stand, a counter unit that could hold a bagged or carded merchandise.

Zara–One of the first thing respondents noticed was the risers and saddlers, which are the grouping of the geometrical shapes and forms to create multilevel for the display. The basic shirts presentation was called “clean”; they were presented in a stagger. Perimeter or the racetrack display was heavily used by Zara.

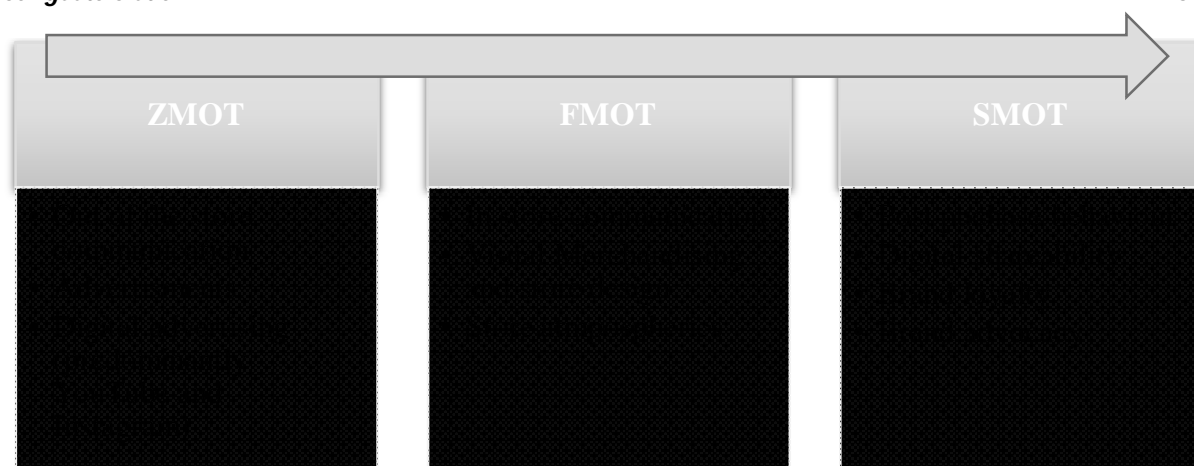


Figure 1. Moments of truth of a shopper at a fast fashion brand (this was a finding by the researcher

Some studies have focused on one or more categories of VMD and store design with the aim to identify the key cues that can affect consumers' perceptual and behavioral state of mind (Meryl P Gardner, 1986). The study suggested that specific design cues can elevate the consumers' brand evaluation. From the ZMET research that we conducted, four themes really came out to be pertinent while evaluating the three brands -:

1. Theme 1 : Fashion as a symbol of economic liberation and social acceptance

The first striking theme was that a lot of respondents considered fashion as a wearable art the signified their purchasing power. A lot of people considered the VMD of all three brands evoke sentiments with its strong associations with COO. Following is an excerpt from an interview,

"I feel that H&M VMD reminds me of the Nordic architecture. I have visited most of the Scandinavian countries. The people over there are obsessed are with neat typography of fonts and white background. In most of the H&M stores the aisles are clean and the ambience feels much like Sweden. Wherever I visit H&M, it reminds of the time that I had it the Nordic countries. It feels as if I am transported to that time; it feels that the same place isn't in India."

Philip Kotler suggested that people are likely to be influenced by 3Fs-Family, Friends and Facebook (social media) to take decisions related to actions to purchase. One of the respondents who is a college student at Shaheed Bhagat Singh College of the Delhi University said,

"Most of my friends shop from all these brands like H&M and Zara. I used to buy a lot from Pantaloons. Soon I realized that prices in H&M were comparable to that of Pantaloon and Shoppers' stop; therefore, I started buying more from H&M. Today, I just go to H&M store whenever, I have nothing to shop...Sometimes I stumble upon something that I had seen weeks earlier on Instagram. I wanted to buy it there and then; but I didn't know where to buy it from. Other day, I saw something similar to what I had seen on Instagram. There was that moment of delight; I just decided to buy that without even looking at the price tag."

2. Theme 2 : Discount deals is viewed as symbol of victory

Price promotion and sales were seen as an extremely enticing promotional technique. Most of the people were immediately attracted to the window decal or any other signage of "sale" outside any of three stores. One of the respondent from Noida said

"I would mostly avoid entering Zara for that I feel that H&M and Forever 21 are moderately priced as compared to Zara. I always enter the Zara store whenever it comes to my notice that the sale season has started. In that time, I try filling my closet with just Zara products. I feel the content of cracking an unbelievable deal."

Humans think in the way of stories. For over 27,000 years, since the first cave paintings were discovered, telling stories have been one of the most fundamental communications methods. When we are being told a story, things change dramatically. Not only are the language processing parts in the brain activated, but any other area in our brain that we would use when experiencing the events of the story are too (Widrich, 2012).

If someone told the respondents about the sale, their excitement got activated. The very idea of buying at marked down prices made them feel successful.

3. Theme 3: Shoppers want to be "seen" while shopping

Shopping in all the three stores is similar to a romcom drama. Most of the shoppers of all the three brands want to be seen and noticed by other shoppers in the store. They seek validation on the number of times they have been noticed at a particular store by the people from the opposite sex. One of the respondents said,

"At times I just go out to shop when I am having a good hair day. Last time when I went to shop, I saw this very cute boy walking down from the trial room. I just wished he looked at me once; but he just kept on walking. When he went passed me, I tried to again bump into him. I was so not luck, when I saw him next time when he

was walking with another girl that I presume was his girlfriend."

External validation is seen as a medium for alleviation of self-esteem. Most of the respondents seek happiness whenever they're noticed for their physical appearance; it gave them the boost for other things in the life.

4. Theme 4: VMD communicates the brand story

People relied on in-store design cues to create a narrative around the brand. There is a difference between brand story and the story of the brand. Brands must evolve the role of their marketing function from "generating transactions" to "building emotional relationships that lead to sale of goods and services". Brands and retailers have a choice to make be meaningful and play a significant ongoing role in people's lives, or remain transactional, only thought of when needed. One of the respondents who was a heavy shopper with all the three brands said,

"A definition of perfect Sunday for me is the day spend under the roof of Select Citywalk (New Delhi). It feels as if I am at a place that has all the parts of the world nestled inside the shopping mall. When I step into Zara store (or for that matter even H&M), it feels that I am in some street in Barcelona. At that very moment I forget everything. What I see at that time? Is the time for myself. It feels as if I am finding a "gift" for myself; a "gift" for all the hard work I had put at work last week. I deserve that gift"

All the three brands had successfully created a brand story around the emotional truths that each of the brand thought were a differentiated voice or brand positioning in a fragmented category of fast fashion retail.

Economic liberation	Snob effect	"I feel that shopping with H&M makes me feel that my family has reached at a certain level"
		"At times, it's okay to talk about the brands that you wear. I would want to shop with Zara because I feel that my status is alleviated "
		"I feel that not all of my friends can shop from most of these brands. It's not a good thing to say, but it feels to be a part of an exclusive clubs"
	Alleviate economic status	"Most of my apparel consumption is conspicuous. I don't think there is a lot of difference in terms of merchandise available in any of the three brand. However, I see the difference in the type of people in all three stores. I think H&M always has the most polished people shop there."
		"I come from a very middle-class family. Most of my rich friends boast about buying clothes from these high street fashion stores such as Forever 21"
Gifting to myself	"I think that at times it's important for me to pamper myself. I would rather spend time in a posh Zara store in Mall of India. I feel that my senses are alleviated the moment I step into the Zara store. The lighting, the smell, the brand....I love everything about Zara"	
Social acceptance	Part of the exclusive community	"While shopping with the club of my friends, I feel more inclusive. Some of my friends have a dedicated day in the week for H&M shopping-we call it the 'Hennez Day'...it's the best day of my week"
		"Inside the store, we feel all of us are the same people who are looking for the different products (of course). It feels that we're the citizens of the same state- the state of Forever 21"
	Neighborliness feels	"H&M very actively talks about conscious campaign of theirs inside the store...I want care for the environment around us. Sometimes I feel that the brand resonates everything that I am"
Take a notice of me	Turning the spotlights on	"Last time, I remember, a boy crossed me in the aisle at Zara store in Citywalk. Immediately after he passed me, I wanted to look at myself at the mirror. Thankfully, there was a mirror on my back...I fixed my hair and then tried to walk across the same guy"
Brand story	The moment of discovery	"I saw one of the models wearing a beautiful red top with a boho print...I had completely forgotten about that top. One day I was waiting for a friend, when I decided to visit a Forever 21 store where I saw almost similar top...there was my moment of discovery"
		"I decided to enter the store when I saw a 'sale' poster on a window decal in Ahmedabad store...I only entered the store because I saw that poster outside the store"

It was also concluded that VMD had a noticeable +ve impact on Brand Equity. Brand Equity was a dependent variable. We wanted to check the veracity of our analysis by the correlation between Visual Merchandising Display (Independent Variable) and Brand Equity (Dependent Variable). For the research, Interbrand Global Best Brands List 2016 was

used to get the Brand Equity scores. We also worked with Brand Managers who helped us with some data from Nielsen and Kantar Worldwide-two leading market research firms. VMD for each of the Brands was given a Qualitative Score-like QS that Google gives for ranking websites on search results.

Brand Name	VMD Scores (out of 10)	Brand Valuation in Million Dollars
H&M	7	12368
Forever 21	6	400
Zara	6.3	13000
		0.70022296

Source : AC Nielsen, Interbrand, Kantar

There is a positive correlation between the brands in the study and their valuation based on latest valuation. Brand Valuation is a function of awareness, recommendation-how likely are you willing to recommend a brand,

and willingness to pay a premium-or how willing are you to pay extra money to buy a product from the brand. Refer to the diagram below -:

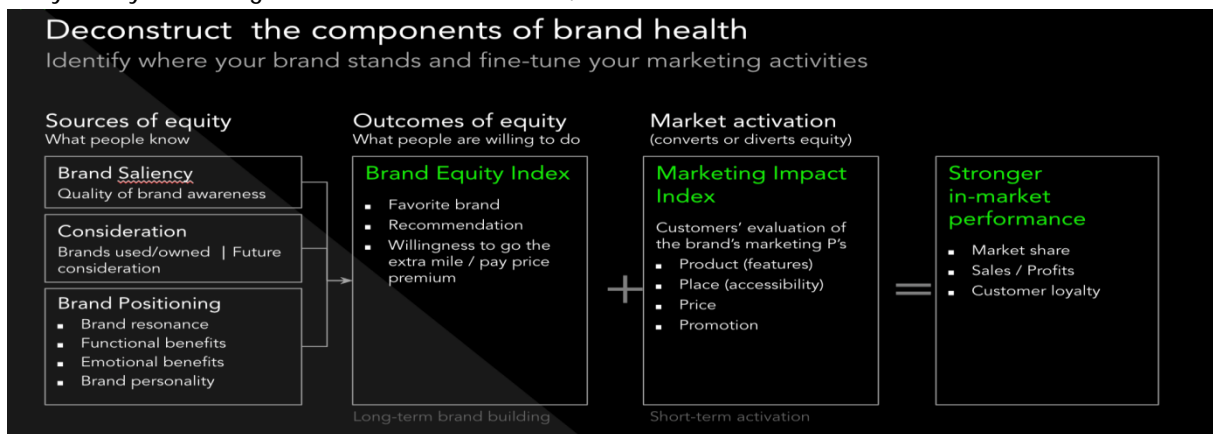


Figure 2.Nielsen IQ Brand Equity Framework

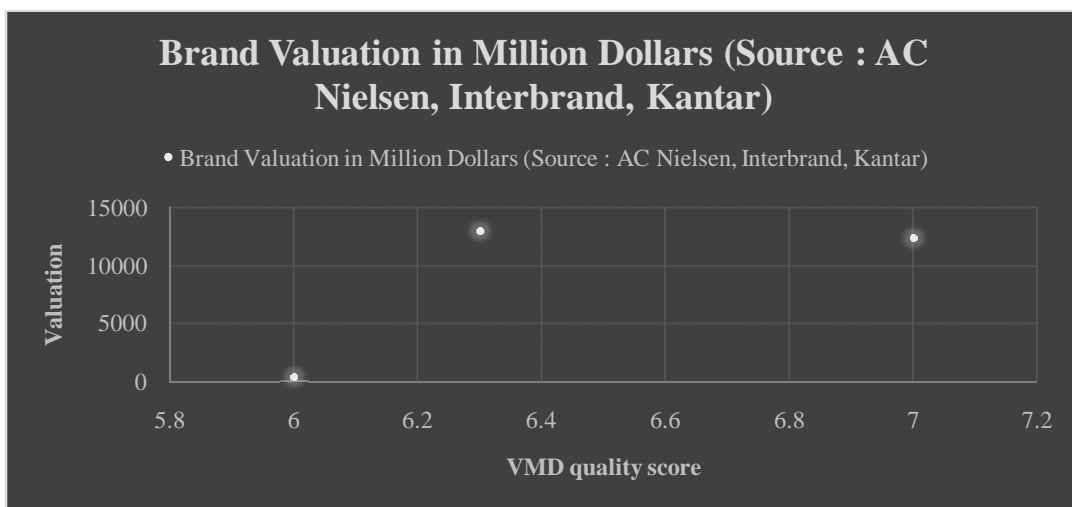


Figure 3.Correlation Scatter Graph on VMD Quality Scores and Brand Valuation

CONCLUSION, IMPLICATIONS, AND FUTURE SCOPE OF THE STUDY

The field of attention research in academic circles is an established one. Brands now want various forms of the study to run in parallel. They want measurable KPI and KRAs to understand the enumerable impact of VMD in the top line and bottom line of the retailer. Visual equity measures the purchase intention post visual interaction with the brand (Oshima, 2004). The ability to establish 'eye contact' and its impact has been referred as visual equity by Chadon (2001). Marketing budgets are continuously scrutinized. The marketing managers need to justify the spends towards VMD to the management. Such justification would remain futile until there is not any metric for the measurement of ROMI (Return on Marketing Investment).

CONCLUSION

Today's consumers have the power of choice, which is a luxury that was not available to previous generations. It really comes down to one thing for the current generation: 'What's the incentive to go to the store?'. Therefore, the brands have started focusing on exceptional services, such as Bonobos, an online men's clothing retailers that found value by opening a tailored store that has the advantages of the cost optimization seen in an online model and branding advantages of a bricks-and-mortar store.

Neuroscience techniques are being practically applied by blue chip brands in resolving marketing challenges. Increasingly, techniques such as eye tracking, facial coding, implicit reaction-speed testing and voice decoding (intonations) are now increasingly available to brands to carry research (Noble, 2014). Undifferentiated and mediocre retail is getting replaced by brands that actively explore and define the role of their physical stores in culture

and their customers' tastes, interest and lifestyle, which will define the retail landscape of the future. The bricks and mortar stores are evolving as the customer experience centers in the digital age (Schwartz, 2017). Samsung 837, located in New York City's Meatpacking District, features selfie booth, a virtual reality tunnel, and a kitchen with display of digital enabled products. In future the brands would need to create a distinctive positioning in the mind of the shoppers for which they would have to clearly define the retail positioning mix from which the VMD would stem out.

The mantra is "unseen is unsold"; the pertinent questions the retailers face at this time must be "Am I really being seen?" (Oshima, 2004).

IMPLICATIONS

The results of the study can be used by all three retailers as guidelines for designing their VMD and store atmospherics. The academic community can benefit as there has never been a dedicated study that decoded the implications of VMD on brand preferences and purchase intentions in the retail scenario.

The study is also indicative of the approach of applying ZMET research into areas related to retail management. The topic investigated in the study is extremely useful in understanding the importance of the subconscious mind for creating successful marketing communication campaigns.

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