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Nature and Functioning of Visual Merchandising in Organized Food Retailing

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Abstract

The Indian food retail sector is one of the biggest industries in the country with an annual turnover of around US \$18 billion. It has been estimated that organized food retailing in India which is worth US \$ 666 million today will increase to US \$ 33,333 million by 2015. The inherent attractiveness of the segment is luring more and more investors from both India and abroad, as is clearly indicated by the opening of a number of retail stores by major corporate houses like those of Bharti, Reliance, Pantaloons (Food Bazaar), Subhiksha, ITC (Choupal fresh), etc. However, to build long-term customer loyalty, price, quality, variety, and right image are very much needed. To attain this, the aesthetic appeal of the store and the way the products are displayed at the store are very important. Thus, the visual merchandising (VM) is the need of the hour at the food retail stores. This paper has studied various components of VM at retail stores and has analyzed the impact of indoor signages on customer's buying behaviour. A comparative analysis of VM has been done at Food Bazaar (Ambala), Subhiksha (Chandigarh) and ITC Choupal Fresh (Chandigarh). Problems faced in implementation of VM at retail stores have been highlighted and some implications have been mentioned.

Introduction

The food retailing sector, an important agribusiness option, is witnessing a paradigm shift having long-term implications on the way food retailing will evolve in the emerging economies like India. The organized food retail industry in India is still at the infancy stage with a share of less than one per cent in the total food retail market, in spite of the fact that food is the largest component in the consumer's spending basket.

Indian consumers are deprived of quality food products, variety and value-added services at the retail end, largely because of the highly

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fragmented nature of food retailing in the country. Retailers are trying to capture a larger share of consumer's spending by expanding their product portfolio. The share of private labels in the basket of key food retailers is also increasing, with in-house brands competing fiercely with well-established brands of leading FMCG (fast moving consumer goods) companies. Further, with the opening of supermarkets like Food Bazaar, Nilgiris, Trinetra, Subhiksha, Apna Bazaar, several Indian (like Bharti, Tata, Reliance, ITC, etc.) and international (like Wal Mart) corporate groups are quickly grabbing investment opportunities in the Indian retail sector and the quantum of investments is likely to skyrocket. Amidst this competition where products and quality will be almost similar, the only point of differentiation will be the '**experience**' that the consumers will get while shopping. The biggest role of providing the shoppers with an unforgettable experience will be that of **Visual Merchandising (VM)**.

Although visual merchandising has long been an important part of retailing within food industry in the western countries, in India the understanding and practice of VM is still inadequate. Today in the food retail industry, price, variety and services are no longer the only purchase triggers. The look of the store and the way the food items are displayed also act as facilitators. Successful retailers have discovered that they can dramatically increase their sales by proper display at the point of purchase (POP).

It is high time that Indian retailers understand and adopt the scientific and professional system of VM rather than conferring to traditional displaying of products. Communication that transforms passive environment as dynamic experiences by strategically placing brand visuals encourages active consumer participation. For this, we need to create successful POP concepts which start with a clear understanding of all the components of VM, in-depth knowledge of problems faced in effective implementation of VM, and study of consumer preferences and buying behaviour. Also important is conducting of comparative analysis of stores (so far a neglected area in Visual Merchandising), which can help in improvising the sales volume vis a vis competitors. With this backdrop, the present study was conducted with the following objectives:

- To study the various components of visual merchandising at the retail stores
- To study and analyze the impact of indoor signages on customer's buying behaviour.
- To identify the problems faced in implementation of VM at the retail stores, and
- To conduct comparative analysis of VM at different retail stores.

Methodology

The study was conducted to explain the nature and functioning of visual merchandising in food retailing at various retail stores. For this purpose, few stores like 'Subhiksha' and 'Choupal Fresh' (of ITC) at Chandigarh and 'Big Bazaar' at Ambala having Food Bazaar as one of its sections were selected. Both primary and secondary data have been used in the study. Secondary data were obtained from research journals, magazines, newspapers and internet sites. The primary data were obtained from personal observations at the retail stores. The study units included three retail stores, 30 customers and 12 retail store employees.

Purposive sampling method was employed for the selection of retail stores. The retail stores with a particular trait, viz. availability of food items on a large scale were selected with the purpose of understanding VM employed to display them. The systematic sampling method was used to select the respondents at the retail stores, according to which every tenth customer entering the retail store was interviewed. Employees were picked up both randomly as well as through snowball sampling method where one gave the reference of other employee for a particular type of information. Structured questionnaires having open as well as close ended questions were employed. The period of study was March 2007.

Results and Discussion

Components of Visual Merchandising

Retail Signages

Signages are one of the integral components of visual merchandising executed at any retail store. It can be a drop down from the ceiling of the store with a word like '**Groceries**' written on it in an eye catching font or it can be an A-4 or A-3 size paper pasted on the store shelves promoting schemes like '**Buy One Get One Free**' and revealing prices of the products lying on the shelves or it can also be a beautifully painted wall having colourful pictures and punch lines like '**Is Se Sasta Aur Achchha Kahin Nahin**' on it (as was in Food Bazaar at Ambala) and so on and so forth. Whatever may be the case, signages are considered as one of the most appropriate ways of conveying messages to the customers. The challenge before the retailers is not limited to simply displaying these signages at their stores but is of designing them professionally while focusing on some of the important parameters like quality of the paper or the material used, colour scheme applied, font used, i.e. whether it is legible enough or not, simplicity of the

message such that it is easy to be interpreted by the customers and above all, location at which these signages need to be placed inside the store such that they attract maximum attention of the customers and pursue them to buy the products. Studies have revealed that one has not more than 3 seconds to let the customer know what he/she will find inside the store.

Retail Planogram

A retail planogram is a diagram that shows how and where specific retail products should be placed on shelves or displayed in order to increase customer's purchases. A skilled planogrammer at retail store develops these planograms for different types of visual merchandising displays (such as shelf-displays, pegboards, or slat board). These are developed based on the information available for the product such as the amount of inventory left for the product, volume of sales per square foot of retail space, and other specific information about products (such as stock keeping unit numbers, product codes, etc.). By analyzing past and current sales patterns, a planogrammer makes recommendations about the number of 'Facings' (how many of the products should face straight toward the customer) a certain product should have on a retail display, how high or low it should be on the display, as well as which products should surround it.

This planogram is then printed out as a visual to be followed by the part-time helper that is often hired to restock retail shelves and displays. This gives management of a retail store or chain more control over how products are displayed, and allows them to track and improve on the success of their planograms. This component is taken care well at the Food Bazaar as there were separate sections for all categories of products without any intermingling of products. It was almost a negligent component at Subhiksha, as there was no proper order of number of facings of a product nor any emphasis was given on category-wise display of products. Juices shelve containing oils and vice versa were the common phenomenon at the store. VM at Choupal Fresh was also strictly taken care of.

Retail Merchandising

Retail merchandising is a major component of visual merchandising. It takes into consideration almost everything a customer experiences from his first sight of the storefront, which includes an attractive and inviting entrance of the store, height of the building of the store, display windows (in the case of Food Bazaar and Subhiksha lot of colourful charts were pasted on the window pans at the entrance) marquee, parking space, etc. until he/she leaves the store with a purchase in his/her hand. It is all about understanding the way customer shops such that the products can be placed at positions in

the store where they have maximum chance of being picked up through increasing visibility and appearance with the help of flood lights, par bulbs, suitable fixtures and fittings, etc. For example, in the case of ITC Choupal Fresh, all the racks were placed on the left hand side and the cash counter was on the right side of the store keeping in view that the moment the customer enters the store, he turns to the left instead of right. Moreover, for the display of exotic fruits and vegetables, a special chamber was designed making it more appealing.

Effects of Indoor Signages

Retail signages were of various types such as Standee, Wobblers, Drop-Downs, Shelf Stock Signage, Wall/Pillar Paintings, and A-4/A-3 Signage, etc. The purpose of application of these signages is to acquaint the customer with various product categories available at the store and aid him in making the purchase. The success of these signages solely depends on the extent to which they attract the customer's attention without creating any ambiguity in his mind. Therefore, it is important to identify as to which type of signage gets maximum influence on the buying behaviour of the customer for the purpose of replication at the store for increasing the sales volume.

Figure 1 shows the response of customers towards different types of signages displayed at the retail store. Most of the respondents ranked 'standee' as the leader out of all types of signages applied having maximum share of 33 per cent, followed by drop downs and shelf stock signages, having almost similar effect with 22 per cent each, with A-4 signages and wall paintings succeeding them. Wobblers were the laggards in the race, as only 10 per cent of the customers had given them rank 1.

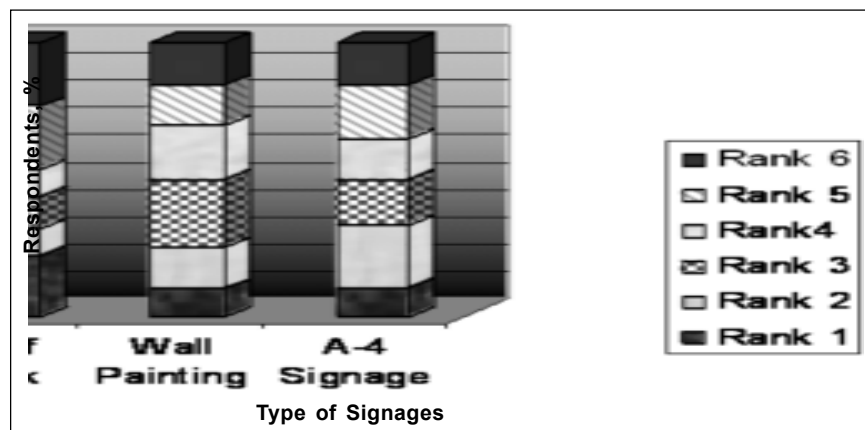


Figure 1. Per cent distribution of respondents representing preference for particular signage

The indoor signages are applied for various purposes such as to promote offers and schemes on different products such as ‘**Buy One Get One Free**’, to highlight price discounts on a particular product, price comparison between store price and MRP, seasonal and festival promotions, etc. It is important to identify messages conveyed through these signages, as referred to by the visiting customer. Figure 2 highlights customer’s preference for message communicated by these indoor signages. It was observed that out of all types of messages communicated by signages, discounts were the ones for which customer had a preference to look at, followed by the price comparison and branding, with almost similar kind of scores.

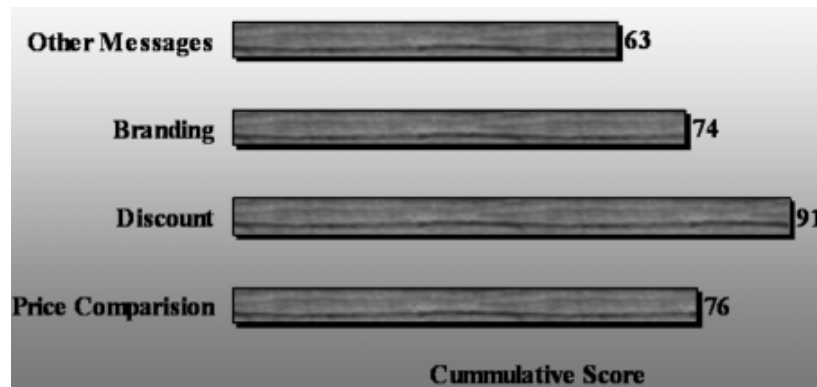


Figure 2. Customer preference for message communicated by signages

Figure 3 reveals the preference of the customers with respect to the signages of newly launched products in established as well as private labels category. Analysis of purchase of a new product with respect to indoor signages revealed that in the case of established products, indoor signages rarely influenced the customer’s buying behaviour, though they made seldom influence in the case of private labels.

Although studying the customer’s buying behaviour was not an easy task as every individual had unique tastes and preferences, but efforts were made by taking into consideration some of the important parameters. The income of the person was the key parameter which helped the customer to make his purchase decision. Therefore, customers were grouped in the following income groups to analyze their purchase behaviour:

Group ‘a’ — for monthly income of less than Rs10, 000

Group ‘b’ — for monthly income of less than Rs 25,000

Group ‘c’ — for monthly income of less than Rs 50,000, and

Group ‘d’ — for monthly income of above Rs 50,000.

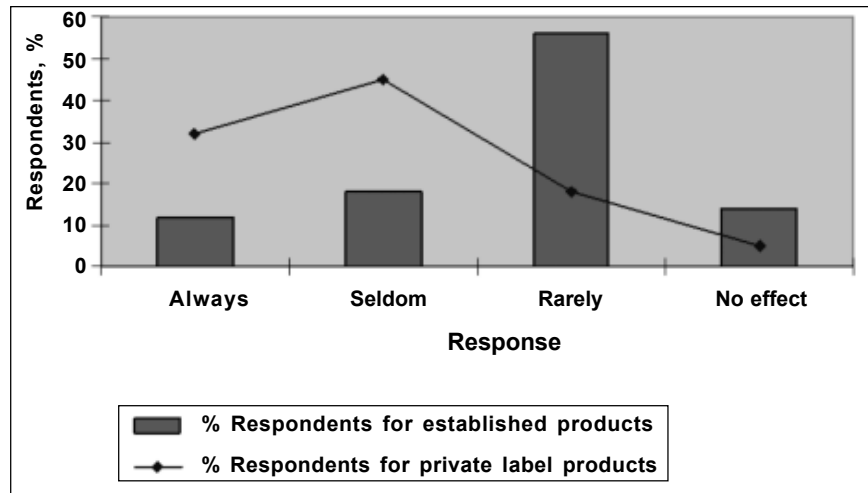


Figure 3. Analysis of purchase of a new product with respect to signages inside the retail store

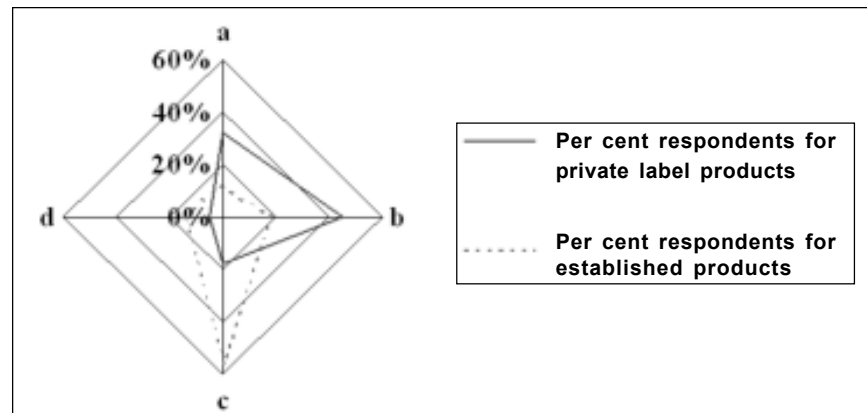


Figure 4. A comparative chart for analyzing income response and purchase behaviour

Figure 4. depicts how customers of different income groups get influenced by indoor signages.

It was noted that customers with per month income of less than Rs 25,000 but more than Rs10,000 were most influenced by the signages in making their purchase decisions in the case of private label products, as the radar lines bent more towards group 'b' showing 45 per cent of the respondents in this category. Customers with income of more than Rs 25000 and less than Rs 50,000 per month were most influenced in making their purchase decisions in the case of established products, as inclination of

radar lines is more towards 'c' in this case with 56 per cent of the respondents belonging to this category. It was found that 90 per cent of the customers were reportedly influenced by signages designed in local flavour/language. Moreover, in terms of gender response it was found that women were more influenced by signages as compared to men in making their purchase decisions. Non-working women were the ones who were much influenced by signages.

VM Implementation

Implementation Process

The VM encompasses a number of activities starting with the designing of layout for the store and packaging of products to the final display of products in the store. All these activities are carried out through the joint efforts of various teams, such as category team which deals with a particular category of products like staples, fruits and vegetables, etc.; marketing team which plans promotional strategies like 'Wednesday Bazaar' in food bazaar, etc. Out-of-house team takes care of places outside the reach of customer and visual merchandising team. The major task of final designing and implementation of VM is carried out by the visual merchandising team which comprises visual merchandiser (one each at head office and at the respective store) category team and coordinator. The exact process of VM implementation has been explained through Figure 5.

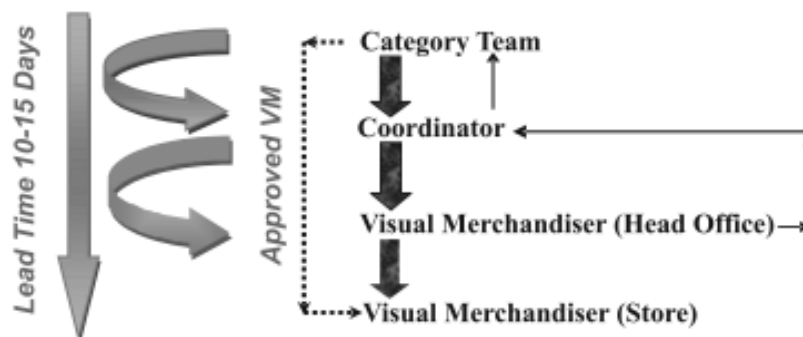


Figure 5. The process and persons involved in VM implementation process

The process usually takes 10 to 15 days. Whenever a VM has to be executed at any of the stores across the country, the category team briefs the coordinator about various promotion schemes that are to be highlighted in the store, estimates of cost involved in VM implementation, specificity of the products to be displayed at the store, focusing on the unique selling points, etc. The coordinator in turn passes the information to the visual

merchandiser at head office. He then develops planogram(s) for the launch of the product and passes it to the coordinator, who in turn shows the various options to the category team for its approval. All options are either shown graphically or a demonstration is made at a store to decide the best one. Once approval is made, Visual Merchandiser at the store executes the plan with the help of housekeeper.

The process of VM execution in any retail store varies according to the category of the products. For example, in the processed foods category, VM is required for product promotion, pricing, launch, etc., especially in the case of festivals, whereas for other categories of products like staples, VM is required for the launch of new products and promotion of the existing products. The companies like Gits, Panchanjanga, Britannia, Amul, Pepsi, etc. are involved in brand promotions for which they pay a price as per the specifications of the space allotted such as shelves, bays and gondola space, etc. for the VM.

The budget involved in VM of any product category is directly proportional to the MRP of the product. VM budget also varies depending upon the store category as for all Food Bazaars, the budget was found high for A category (turnover more than 1.5 crore) store as compared to B (turnover between 80 lakh and 1.5 crore) and C category (less than 80 lakh) stores.

Problems in VM Implementation

- **Undefined Areas of Responsibility:** The tasks and responsibilities of teams involved are not clearly defined which results in over-lapping of tasks and underutilization of manpower.
- **Lack of Coordination:** The visual merchandiser sometimes faces difficulty in coordinating with sales staff and even with category team. Sales staff do not follow the exact instructions and remove the VM without his prior permission, as for example, in the case of stocking out. Also, the category team sometimes sends the visual merchandising for store-specific promotions directly to the manager of the store or the sales staff without informing him, resulting in poor display at the shop floor. In certain cases, the category team does not consult the visual merchandiser on availability of products and advertising rates before giving space to brands for promotions.
- **Improper Communication:** Information flow sometimes gets distorted at various levels of the hierarchy. The coordinator sometimes could not brief visual merchandiser in the same sense as was handed over to him by the visual merchandiser at the Head office and visa versa, leading to wrong decisions.

- **Limited Freedom of Thought:** The visual merchandiser is not given enough freedom or confronts interference in his work by the category team.
- **Poor Time Management:** Time management is poor at various fronts such as there exists a gap between the time at which stock and VM reach the store. Sometimes, even the visual merchandiser at the store is not given sufficient time to come up with designs, resulting in ineffective VM at the store. Even the target of VM implementation within the lead time is generally not met.
- **Poor Synchronization of Activities:** There is a poor synchronization of activities, as sometimes VM is ready but the stock does not arrive at the store; as a result VM is not put up, leading to wastage. On the other hand, it is difficult to put the stock on hold in case of non-availability of VM when needed urgently, as effective space utilization is a major concern at any retail store.
- **Poor Monitoring and Evaluation:** Once the VM has been executed, very less attention is given on its monitoring and evaluation. Category team and the coordinator visit the store not more than once in a month. VM implementation is usually checked by the pictures sent by the store representative through mail. This results in an ineffective VM and if any change is required later on, it causes lots of wastage.
- Designing VM for perishable products like fruits and vegetables at the store has become the major area of concern for visual merchandiser, as excessive lightning display deteriorates them due to changes in the sensitive pigments present in these communities, causing huge wastage.
- In other product categories like that of beverages, light used for VM causes their oxidation, leading to foul smell and off flavour.
- Sometimes problems include too many signages, ambiguous or misleading messages, spelling errors or signages that are difficult to read.

Comparative Analysis of VM

A comparative analysis of visual merchandising at Food Bazaar, Subhiksha and ITC Choupal Fresh was also carried out and has been described in this section.

Food Bazaar (Ambala)

Food Bazaar, a part of Big Bazaar, located in Ambala, is known for commercial developments, and has become one of the most attractive purchase destinations for grocery items owing to its especial traits of

convenience and economic viability. At this store, it was found that there were separate sections for all categories of food products and the name of each section was very well highlighted, using the contrast of bright colours at the background and light for the written matter.

Display of Food Items at Chill Station

Chill Station: This section was mainly for perishable products like butter, cheese, juices and other products which may be demanded as chilled by the customer, such as mineral water, juices, etc. All the products were symmetrically displayed in a horizontal chamber and the temperature maintained inside the chamber during March was 10 °C which was varied depending upon the season. The front of this chamber was open so that customer can easily pick the product and have its touch feel.

Hungry Kya: This section mainly focused on nutritive products like horlicks, complan, cornflakes and also included snacks such as biscuits and *namkeens*. The upper portion of the back wall of this section was painted with the name of the section along with pictures of some of the products like cornflakes pack.

Display of Fruits and Vegetables in Farm Fresh: This section had no pictorial display but to make this section look attractive a mirror was fitted at the ceiling behind the display of fruit racks so that one could see a counter image of those fruits, giving this section a huge aesthetic appeal.

Display of Pulses in Golden Harvest: This section, allotted to pulses and wheat, had a beautiful display of products in uniform-sized bins (for open lot), painted uniformly and symmetrically placed pallets. The racks placed in this section contained packed private labelled pulses as well as wheat of other companies.

Display of Food Items in Chef Zone: This section consisted of two sub-sections: one was for 'Ready to Eat' products like jams, jellies and pickles, etc. and the other was for 'Ready to Cook' products like vermicelli, macaroni, maggi noodles and idli, gulab jamun pack (of major players like Gits, etc.). Name of both these sections was indicated with the help of drop downs and each category was allotted a separate shelf.

Chocolates and Candies: There was a special section for chocolates and candies with a beautiful display on racks and steel stands and in glass-covered counter table.

Other important observations about the store were as follows:

- There was no difference between the product displayed on shelf and the label indicated in the shelf strip.

- There was variance with respect to the price display of products in the store. For certain products like pulses in the bins even the name was handwritten. Whereas for all other sections, there was a computer-printed display of prices.
- Special schemes and promotions were displayed in the centre, between two rows of the shelves.
- All labels on shelves were uniform in size and computer-printed. Although the colour and font size used for printed matter on this strip were similar, the fonts used were different and eye catching for special schemes like 'buy one and get one free' and were written with red instead of black, as in other cases.
- There was a good shopping space of nearly 3.5 tiles among the racks, which made the trolley movement very easy and convenient.
- There was a uniformity in the entire layout with respect to the length, width, height and colour of the display racks.
- The section had been made attractive by placing fruits in the centre in a round display rack. It was possible due to the large floor space of the section.
- There were too many drop downs used in all the sections.
- The Food Bazaar price was indicated along with the maximum retail price only in those cases where the former was lower and for this reason, some products, e.g. ready-to-cook products did not have any discounted Food Bazaar price displayed on their racks.
- Drop Downs/Danglers were hung near the cash counter with the objective of maximum visibility.
- The new products or new launch were kept in front of the entrance.
- In the rice and wheat bins, plastic display stands were dug in the heap. As the level of the material decreased in the bins, the label became invisible to the customer. In some cases, the label was completely dug in the heap.
- The floor at the entrance was beautifully painted with the tagline 'Just buy Munchy Crunchy Snacks and See the World Cup', trying to promote one of their products in hungry kya section.
- Special racks were allotted to tea, coffee and juices in the beverage category which added to customer's convenience.
- Throughout the store the walls were colourfully painted with promotion of the store with its tagline '*Is Se Sasta Aur Achchha Kahin Nahih*', giving the customer a sense of belonging.

Subhiksha (Chandigarh)

Subhiksha, the Chennai-based discount chain, has opened up more than 19 stores in Chandigarh and its adjoining areas of Mohali and Panchkula. Detailed analysis of VM applied at the store in Chandigarh was conducted and following were the observations.

- In the fruits and vegetables section, the price labels as well as the names of the commodity were written with chalk or in sketches. They were often partially erased and were difficult to comprehend by the consumers.
- Sometimes the basket in which a fruit/vegetable was displayed contained different product than what was displayed on the name slip.
- List of all the fruits and vegetables available were displayed on the white board having three columns, one for the name, second for MRP and third for Subhiksha price. Though name column was permanently painted, price columns were filled using sketches so that they could be changed daily as per need.
- Products of similar category were not placed together. For example, biscuits which need to be placed with other snacks, were lying with oils.
- Negligence was observed in the case of updating the VM. For example, chart displaying special schemes on certain products on *Holi* was not removed or replaced and was creating much untidiness.
- In certain cases, the product was either not placed as per the label or was totally missing from the shelf. For example, in one case as per the label the shelf contained real juices but the shelf in reality contained only Tropicana juices. In other case, under the written saffola gold, the item was missing from the shelf.
- Stacking of cartons on the floor, especially at the entrance of the store, was very common which was not only giving a shabby look to the store but was also creating inconvenience to the customer entering the store.
- The space between two racks was not more than 2 tiles, leading to inconvenience in the movement of any two customers at the same time, deviating their focus from certain category of products.
- The rack placed at the entrance, showing recent arrivals, was very short in height and there was no label indicating that those were recent arrivals.

ITC Choupal Fresh (Chandigarh)

ITC, which has already launched its retail and wholesale vending of vegetables and fruits, has recently opened one of its stores in Sector 26 of Chandigarh, which is the only one of its types in this city. The VM implementation process at this store was studied in detail and the findings are listed below.

- This store was entirely focused on fruits and vegetables having an excellent implementation of VM in it.
- No handwritten label could be seen in this store. Only the larger labels (A-4 size) were present to display the name of a fruit or vegetable. These labels were further inserted in a plastic frame with a transparent sheet on it which was preventing the paper from folding and was thus ensuring a clear visibility.
- A special horizontal chamber was found at the end of the store in which exotic vegetables and fruits were beautifully displayed with equal spacing among them. The temperature inside the chamber was also well maintained to avoid any harm to their quality. The front of this chamber was open so that the customer could have the touch feel before buying.

Display of Exotic Vegetables at Choupal Fresh

- The labels also contained information regarding the price of the product per kg in computer-printed format.
- A beautifully painted board displayed behind the cash counter was showing the whole channel of procurement of these fruits and vegetables, thus passing a message of assured quality of their products to the customer. The placement of this board led to its maximum visibility.
- There was a sufficient space for the movement of trolleys inside the store, providing convenience to the customer.
- All the fruits and vegetables were found as per the labels and none of them was wrongly placed.

A Comparison

A comparative analysis of the three stores revealed that more professional VM was applied at Food Bazaar (Ambala) than Subhiksha; though some attention is required in their Golden Harvest section in the case of signages inserted in the open bins. The ITC Choupal Fresh was the leading store as far as display of fruits and vegetables was concerned as

compared to that of Food Bazaar's Farm Fresh section and Subhiksha's display of fruits and vegetables.

Implications

The study has revealed that retail planograms, retail merchandising and retail signages are the three important components of visual merchandising. Hence, care should be taken while handling these components such as :

- Retail signages should be professionally designed with proper blend of simplicity, brightness, and lighting and should have a clear visibility from all angles while giving importance to its quality.
- Planogrammer employed for designing the retail planogram should be highly skilled as these planograms help in not only management of the store but also in increasing sales volume.
- All aspects of retail merchandising such as storefront, store environment, etc. should be taken care to have an effective VM at the retail store.

On the basis of the study conducted at the retail store, it could be concluded that indoor signages affect the customer's buying behaviour in one way or the other. Some important implications are

- Out of various types of signages applied at the retail store, 'standee' has the major influence on the customer.
- Discounts are the most common message for which customer looks at the signages, hence these should be placed at the most eye-catching position in the store.
- In the case of established products, indoor signages rarely affect the customer's buying behaviour and they seldom influence in the case of private labels. Hence, attractive signages should be applied while launching a new product.
- Designing of signages at a particular store should be done based on the income status of the majority of the customers for a particular category of products.
- While designing signages, focus should be given on local touch and women orientation keeping in mind the psychology of non-working women in particular.

Study has also revealed problems related to VM implementation like that of undefined area of responsibility, lack of coordination, poor communication and synchronization of activities, and poor monitoring and control. Proper administration of VM at the retail stores is thus the need of the hour and for that, focus should be given on category briefing, smooth

communication, strict monitoring and control and having more defined roles of all the employees at the store.

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- <http://www.lindacahan.com> (10/04/07)
- <http://www.ncrcrd.iastate.edu/vis.merch-cont.html> (14/04/07)