THE INFLUENCE OF GLOBALISATION ON STORE IMAGE IN SOUTH AFRICAN APPAREL RETAIL DESIGN

by

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DECLARATION

I, Kelly-Ann Jansen, declare that the contents of this thesis represent my own unaided work, and that the thesis has not previously been submitted for academic examination towards any qualification. Furthermore, it represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

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ABSTRACT

Globalisation and rapid responses to competition and technology have reshaped the retail industry and consumer's expectations toward store design. In the constantly changing globalised world, retail design is so inextricably connected to economic markets and trends as drivers for consumption that we ask whether there is still a place for local design? This study is aimed at understanding how globalisation has influenced store image in South African apparel retail design and to identify to what extent global and local brand stores speak a common design language. A comparative study was done of two local and two global brand stores, all of which are represented locally within retail malls in South Africa. Data gathered through observations and a focus group was analysed using a store image model developed by Janse van Noordwyk (2008) and used as a conceptual framework to gain insights. The South African apparel retail sector is constantly confronted with a fundamental challenge whether to take part in global processes or to do so in ways that promote and provide sustainable growth locally. The findings indicate that the design of global branded stores is absorbed into the design of local branded stores thus acculturating to the language of the global market. The language of retail design has become universal at the cost of local identity and situated relevance driven by advanced capitalism; the author argues that these need not be mutually exclusive.

Keywords

Retail Design, Globalisation, Cultural Identity, Store Image, Store Identity, Store Interior, Store Atmosphere

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GLOSSARY

For this thesis, I refer to the following definitions:

Globalisation: *"The worldwide movement toward economic, financial, trade, and communications integration. Globalization implies the opening of local and nationalistic perspectives to a broader outlook of an interconnected and interdependent world with free transfer of capital, goods, and services across national frontiers"* (Business Dictionary, 2014).

Store image: *"Store image can be described as the overall look of a store and the series of mental pictures and feelings it evokes within the beholder. For the retailer, developing a powerful image provides the opportunity to embody a single message, stand out from the competition and be remembered"* (Sideroad, 2007).

Brand image: *"The impression in the consumers' mind of a brand's total personality. Brand image is developed over time through advertising campaigns with a consistent theme, and is authenticated through the consumers' direct experience"* (Business Dictionary, 2015).

Retail Design: *"Retail design has become a discipline in its own right, containing elements of architecture, interior design, graphic design, product design and web design. The word 'retail' refers to the selling of products to an end-user. So, retail design is about designing spaces to facilitate the selling of these products"* (Quartier, 2011a: 48).

Living Standards Measure (LSM): *"LSM is a commonly used tool in retail sectors in Southern Africa. It groups populations according to their living standards using criteria of different variables that each carrying different weighting with some being positive and others negative. It divides the population into 10 LSM groups, 10 (highest: eg. high income earner with a house and car) to 1 (lowest: eg. living in rural area with no television)"* (SAARF, 2012).

Visual Merchandising: *"Visual merchandise is the presentation of a store and its merchandise in such a manner that will attract the attention of potential customers. It involves decorating the store keeping the interior presentation the same as what is promised on the outside"* (The Economic Times, 2014).

Multi-sensory Design: *"Design that impacts the five senses: sight, hearing, taste, touch, and smell"* (Breffeilh, 2010: 2).

1. CHAPTER ONE: INTRODUCTION

1.1 Introduction

"A fast-emerging discipline in the field of interior design is retail design"

Petermans & van Cleempoel, (2010:23).

Globalisation and rapid responses to competition and technology have reshaped the retail industry and consumer's expectations toward store design (Morrell, 2012:1-9). In a constantly changing globalised world, retail design is inextricably connected to economic markets and trends as drivers for consumption (Appadurai, 2010: 256). This raises the question as to whether there is still a place for local retail design? Has the global store image replaced the local identity of retail design in South Africa? The South African apparel retail sector is confronted with a fundamental challenge whether to take part in global processes or to do so in ways that promote and provide sustainable growth locally (Moodley, 2002: 67).

This research in the field of interior design looks at the extent to which global and local brand stores are similar and aims to interpret reasons why this has occurred. The research further aims to understand how globalisation has influenced store image in the South African apparel retail design. This research adopts a qualitative approach, in the form of a comparative study, of two local and two global brand stores represented locally in South African malls. Data gathered through observations and a focus group were analysed using a store image model first developed by Janse van Noordwyk (2008) and further adapted by van der Vyver (2008).

1.2 Background to the research problem

The retail industry is valuable to South Africa as it is a significant contributor to economic expansion and the wellbeing for the country and its people (Cant & Hefer, 2013: 89). Large numbers of people living in South Africa are employed in the apparel retail sector (Cant & Hefer, 2012: 1490). This influences their lives tremendously as the apparel retail industry is a significant provider in the gross domestic product of the country (Cant & Hefer, 2013: 90).

Retailers face continuous strain owing to an unstable economic climate as discussed by Cant & Hefer (2013:90). Due to the economic recession, consumers are questioning their disposable income before making a store purchase and retailers question the

value of their time and money spent in promoting a successful retail store image in order to attract consumers (Cant & Hefer, 2013: 1217).

Globalisation is a reality that introduces new avenues, responsibilities and challenges for researchers in the field of apparel retail (du Preez & Visser, 2001: 80). The future of retail is being shaped by numerous factors, variables and trends created by the impact of global developments. The global developments identified from literature include: technological developments, consumerism, marketing, brand image, identity, store image and experience. These developments have had a strong effect on the advancement of new consumer behaviour (Morrell, 2012:1-9). Due to these radical effects', the competitive retail environment has changed and customers have grown higher expectations of retail. Customers have become more knowledgeable and want to be in a position where they are given more options about products and prices. Through the ever-growing technological advancements of online shopping and mobile shopping applications enable consumers to act quicker and more efficiently in making informed decisions before visiting retail stores (Morrell, 2012: 6).

According to du Preez and Visser (2001), information on South African apparel shoppers is limited and researchers are urged to focus on the multicultural nature of the South African population. American research findings cannot be accepted unconditionally as valid for South African circumstances, but should be tested empirically (du Preez & Visser, 2001: 80).

1.3   Statement of research problem

Morrell (2012) states that the future of retail environments has changed. According to an Arup Foresight report about the future of retail, technological developments have had a negative effect on the market where many retailers are faced with market infiltration, increased commoditisation and stagnant economic growth (Morrell, 2012: 9).

Products and services can easily be replicated at more affordable prices which allow consumers to acknowledge price value more than quality value, creating a demanding consumer market with much complexity. Retailers are now being expected to redesign their stores regularly to stay up-to-date with technological developments and implement a store design that meets both the consumer's needs and portrays the stores brand image within its context (ie. within a shopping mall). In conjunction with this,

environmental and social impacts need to be taken into consideration (Morrell, 2012:1-9).

Due to the competitive nature of the retail environment, it becomes necessary to explore differentiation amongst each retail store design. Competition can be alleviated through the development of a unique store image which, in turn can contribute to marketing, communication and brand image representation (Van der Vyver, 2008: 3). By identifying strengths and weaknesses of a retailer's store image, designers can create a store image that is best suited to the market, and which positively influences consumer perceptions and behaviour (Van der Vyver, 2008: 3).

Retail design is a multidisciplinary field of study, thus many studies in this field tend to be quantitative. However, interior design in general - and retail design in particular - only recently started to develop a qualitative body of knowledge (Quartier, 2011a: i). Van der Vyver (2008) and du Preez and Visser (2001) recognise a gap in exploring retail store differentiation within the South African retail industry. There is limited published research available regarding the South African retail industry within this global context which has resulted in a lack of understanding of the importance of design for the retail industry in South Africa. In this research, I propose to understand how globalisation has influenced store image in South African apparel retail design.

1.4 Methodology

The purpose of my research is to obtain information that is relative to the research question (George, 2011: 5). In order to obtain this information, observations were carried out at selected retail outlets in order to compare local and global brand retail store examples within the apparel retail sector (George, 2011: 6).

I observed the store image attributes within local and global brand stores situated in malls in South Africa. The observations were recorded through a qualitative approach by tabulating narrative data collected through observations, a focus group discussion and photographic analysis in an attempt to obtain a deeper understanding. Photographs of the chosen global and local brand stores were derived from publicly available data such as websites, articles and books.

Once the analysis of the secondary data was conducted and the individual observational analysis completed, a focus group of interior design specialist participants visited and observed the local and global branded stores. Thereafter, a

focus group discussion was held. A focus group is a useful addition to a comparative study as it maximises the potential of identifying patterns through the rich data gained, additionally providing valuable explanations for the identified patterns (Barbour, 2007:154).

Specialists approached for the focus group discussions were participants who were readily available and willing and able to participate in this study. This type of selection process is an example of a sample of convenience, as many contributors in the apparel retail design industry are not readily accessible and willing to participate (Given, 2008:124). The focus group discussion allowed for greater access to interpretations and arguments between participants.

Focus group questions were formulated using the Janse van Noordwyk's (2008) store image model to understand the influence of globalisation on store image in South African apparel retail design. Using this model and multiple data sources, created a fair comparison where the data gathered provided a wide range of contrasts as well as commonalities. Comparison of contrasting datasets provided triangulation when identifying similarities or differences in the data (Barbour, 2007:56).

An analysis and comparison were completed based on Janse van Noordwyk's (2008) store image model using the attributes identified as a conceptual framework. A conceptual framework guides the empirical data collection process (Farquhar, 2012: 37). This model includes eight store image attributes, namely: atmosphere (store interior, store atmosphere), convenience (transportation, location, parking, shopping ease, store hours.), facilities (store layout, store appearance, convenience of facilities, fitting rooms, fixtures), institutional (clientele, store reputation), merchandise (assortment, style, price, quality), promotion (advertising, displays, sales incentives), sales personnel (interaction, appearance) and service (after sales service, payment options in store service, delivery options)
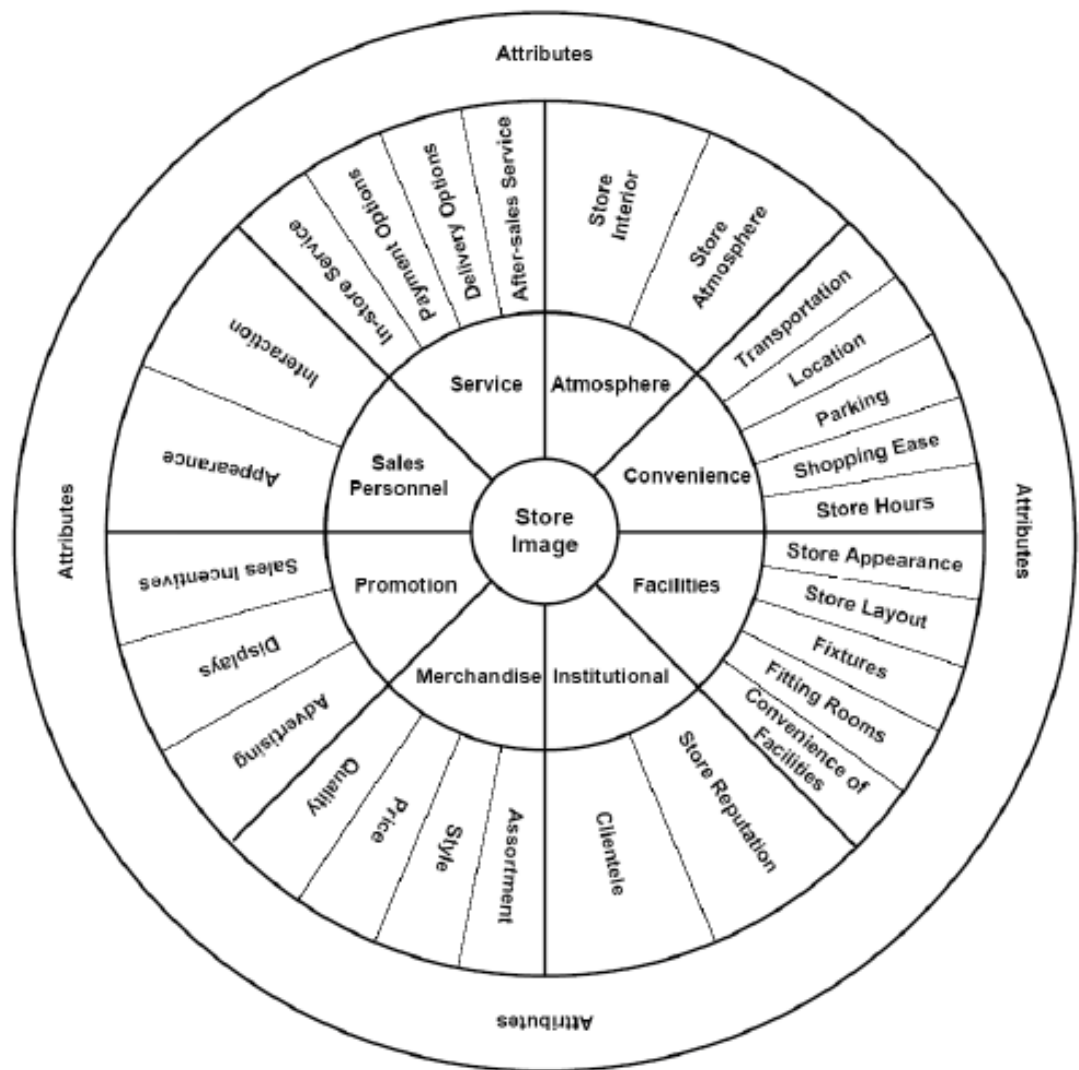
Figure 1.1: Janse Van Noordwyk's Store Image dimensions.

(Janse van Noordwyk, 2008)

According to Lewis and Ritchie (2003), one of the useful methods in this multiple method system is comparison, as it informs and aids a selection of data to develop a strong argument through the findings. Comprehensive and accurate documentation of data is essential for informed use of data (Given, 2008:194). Thus, a structured analysis was utilised as it involves large amounts of information that could cover a larger sample size. Each set of data was categorised, summarised and analysed into meaningful sections. Separating and connecting these sections can result in data being grouped into themes, or concepts through collection (Given, 2008:72). Thereafter, the different perspectives and types of data were formulated to one conclusion, answering the following research question.

1.5   Research Question

How has globalisation influenced store image in South African apparel retail design? In order to answer the research question, the following sub-questions were formulated.

a)   To what extent are local and global retail brand store images similar?
b)   Why has this occurred?

1.6   Aims and Objectives of the research

1.6.1   The Aim

The aim of this study is to interpret how globalisation has influenced store image in South African apparel retail design.

1.6.2   The Objectives

The objectives of the research are to:

- Compare the store image of local and global apparel retail outlets through an analysis of data obtained from researcher's observations, data available in the public domain and focus group observations to attain to what extent they are similar or different.
- Interpret store image similarities of local and global apparel retail outlets to understand why this has occurred in relation to globalisation.
- Interpret store image differences of local and global apparel retail outlets to understand why this has occurred in relation to globalisation.
- Conduct a focus group discussion with selected interior design specialists in an attempt to interpret their views about how globalisation has influenced store image in South African apparel retail design.

1.7   Delineation of the research

This research only focuses on the design of global and local brand stores within the South African apparel retail sector represented in malls such as the Victoria and Alfred (V&A) Waterfront and Canal Walk, situated within middle and high Living Standards Measure (LSM) brackets to interpret how globalisation has influenced store image in South African retail design within the apparel retail sector. These malls were chosen as they are each situated in a central area within Cape Town. Each of the brand stores

utilised in my field research is situated within these chosen malls and in each store, there is a clear use of design.

I excluded global brands that are represented in factory outlets and other surplus outlets in lower LSM brackets. These stores are not discussed or analysed as they are typically not designed to a level where Janse van Noordwyk's (2008) model can be applied.

1.8   Significance of the research

This study will contribute to academic literature in the field of apparel retail design in South Africa; create awareness of the importance of South African design in the retail sector and could be of interest to apparel retailers, interior designers and students of design.

1.9   Conclusion

This chapter provided an introduction to the research and indicated the significance of this study. It outlined the background to the research, followed by the problem statement. The main research question was highlighted, with two sub-questions to assist the aim of this research, and the objectives defined to achieve this. The methodology was briefly explained with further elaboration in chapter 3. The following chapter will provide literary insight with regard to the influence globalisation on store image in South African apparel retail design.

2. CHAPTER TWO: LITERATURE REVIEW

2.1 Introduction

In this chapter, I discuss literature pertaining to globalisation and its impact on store image within the field of retail design. The scope of the review defines design aspects relating to retail stores including both tangible and intangible design elements of store image. The review has been laid out according to store image attributes as identified by Janse van Noordwyk's store image model (2008). Only the attributes that directly influence retail store design have been included.

In a preliminary review, academic literature in the field of design and retail design were consulted to establish current discourse in this field. The academic literature consulted comprised of journal articles, online databases and books. The preliminary data is summarised in the table below and arranged according to themes that emerge from the literature.

Table 2.1: Overview of preliminary literature review.

Summary and Author	Themes					
Emphasis on how reliant we have become on technology and the strong relationship we have with imagery as consumers due to this. Imagery seen as a means of media and communication to lure customers into stores (Appadurai, 2010).	Globalisation	Consumerism	Technology	Marketing	Brand image	Store Image
Promoting the understanding of the impacts of technology on culture and society through theoretical and practical perspectives in media, as understanding media and their effects has become one of the pressing challenges of our time. "Medium is in the message" (McLuhan, 1994).	Globalisation		Technology	Marketing	Brand image	
Points out how globalisation, rapid competition and technology have reshaped markets and businesses. He acknowledges that businesses might sell the same type of product but it represents a different brand identity (Kotler, 2002).	Globalisation	Consumerism	Technology	Marketing	Brand image	
Discusses architecture and the senses through the developing world of technological culture and the image versus imagination in a contemporary culture through the effects of globalisation and consumerism (Pallasmaa, 2012).	Globalisation	Consumerism	Technology			

Description	Globalisation	Consumerism	Technology	Marketing	Brand image	Store Image
Discusses the history and importance of visual merchandising and window displays. Points out the development of technology within retail industry and its influences on design (Morgan, 2011).			Technology	Marketing	Brand image	Store Image
They discuss visual merchandising extensively to determine techniques and strategies that can be implemented in order to improve visual merchandising within an apparel retail store through analysing consumer behaviour (Hefer and Cant, 2013).		Consumerism		Marketing	Brand image	Store Image
A global team that identifies and monitors the trends and issues most likely to have a significant impact upon the built environment and society at large. They explore the drivers of change that are shaping the future of the retail sector. Revealing important trends that are causing new consumer behaviours and examines some of the likely impacts that these developments will have on future retail environments (Morrell, 2012).	Globalisation	Consumerism	Technology	Marketing	Brand image	Store Image
Recognises that Design, branding and store image are the expressions of an effective positioning strategy. The particular image that a store conveys might therefore be the key determining factor when a consumer chooses a store (Van der Vyver, 2008).	Globalisation	Consumerism		Marketing	Brand image	Store Image

The table indicates a common thread recognised from key authors' works. Design and retail are largely impacted by technology, within a global context. Technology is identified as an important element by three of the five authors in the preliminary review. This is important as it ties in with design, brand image and how one can influence consumers' senses through multisensory design (Appadurai, 2010; Pallasmaa, 2012; McLuhan, 1994). Both Cant & Hefer (2013) and Morgan (2011) agree that store design is no longer just about the transaction but more focused on the atmosphere created within the store. Enjoyable customer experiences can be achieved by having stimulating and visually appealing retail environments.

Appadurai (2010: 254) introduces the notion that *"Globalisation is a speeded-up movement of people, space and place"*. Through his anthropological approach to issues of globalisation, consumption, culturalism and ethnicity in a modernist society, he focuses on geographies within these issues. Much of his research is focused with particular specialisation in South Asian areas and Americanisation. Appadurai also mentions that there is a need for the study of specific geographies within these issues. His research suggests that local is just as important as global. The focus of my research is on stores within the Cape Town region of South Africa, thereby representing an analysis of a specific area/site and how localities emerge in a globalising world.

The effect of globalisation on the South African retail sector has challenged retailers to question the design of their stores, as they do not have financial leeway to design their stores as international retailers do (Cant & Hefer, 2013:1217). This is observed through the success of many international brand stores, such as Zara, which is acknowledged by Morgan (2011:15) as a globally recognised store that continues to thrive, versus many other stores known in South Africa that are not as recognised in other countries. Improving the retail design industry in South Africa could be of great value as the South African apparel sector contributes significantly to economic expansion.

2.2   Globalisation

The world is engaged in the powerful process of globalisation (Jordaan, 2001: 79). Globalisation is a complex process, encompassing constant cultural interactions, social relations and transactions, political power and economic activity; linking people, communities and institutions across physical and digital borders (Khyade, 2018; Okoro et al., 2017; Jordaan, 2001). It is manifested by the world-wide growth of interconnectedness, flows of trade, investment, migration, culture and the exchange of information made possible through technology (Khyade, 2018; Wheeler, 2009; Herrie & Wegerhoff (ed.), 2008). Thus, all aspects of globalisation provide opportunities and challenges for developing countries such as South Africa (Jordaan, 2001: 79).

Globalisation is beneficial to the world economy (Okoro et al., 2017:107). Economically, globalisation has influenced the location of economic activity, enabled increased interactions between countries and growth in international trade of goods and services. This has caused changes in the dispersal of incomes across and within countries (Wolf, 2014: 24). It is also the process of economic, political and social change that occurs when all participants in a system have access to a common pool of resources. This common pool includes markets for capital, science, technology, goods and services and cultural goods. Access to the global resource pool changes the dynamics of the system, as well as the nature of competition, however within Southern Africa not all reap the perceived benefits. It becomes apparent through South Africa's highly unstable currency that there are clear disadvantages (Jordaan, 2001: 80).

PricewaterhouseCoopers (PwC) completed a report uncovering insights about retail. They reported that years of global economic growth has impacted affordability within every income bracket in South Africa and has resulted in a highly volatile economy for retailers as they face constant cost pressures such as increases in fuel, electricity and

water prices, along with retail occupancy and materiality costs that continue to escalate (PwC, 2012: 14).

In a globalized context, language and culture play a role in communication. If international retailers are to succeed in foreign markets, retailers need to communicate their brand clearly to customers of different cultures, as they are not the same throughout all areas (Burt & Davies, 2010; Hibbert, n.d). Places are very distinct in history, geography and culture. It is therefore important to understand the place before understanding the identities of people inhabiting them (Herrie & Wegerhoff (ed.), 2008: 223). A sense of place is no longer apparent in a world increasingly influenced by globalisation. The same products, stores, building structures and languages are found worldwide, forming hybrid cultures and identities. (Herrie & Wegerhoff (ed.), 2008: 165). However, implementing a common design language cannot depict individual identity, as sameness increases, differentiation and uniqueness decreases (Herrie & Wegerhoff (ed.), 2008; Hibbert, n.d).

According to Herrie and Wegerhoff (ed.), (2008: 222)

> *Identity is frequently related to geographical location and a specific sense of place, a place which may be characterised by a distinctive climate, and particular geographical, cultural, linguistic, architectural, social and other characteristics. Notions of identity also rely on memory of a shared past, a particular place and the creation, and retention of a coherent symbolic repertoire of signs.*

Globalisation has changed the way in which knowledge is produced and distributed. Consumers have more power in retail environments due to the technological era in which we live. Consumers are faced with more choices and in order to make that choice they require more information. To gain this information they turn to technology for assistance, such as the internet and social media where they can shop, be more vocal, compare prices, products and even their customer experiences (PwC, 2012: 6). Retailers are using technology to improve supply chain management systems, but also to gain insight into consumer purchases in order to increase economic opportunities (Wolf, 2014; PwC, 2012).

Despite the increase in multichannel retailers over the years, the physical store remains an important element of purchasing. The need for an engaging and curated store experience has therefore increased and retail design has become valuable in order to

enhance store image (PwC, 2017). Retailers continue to try and keep up with the constant changes in technological advancements and marketing strategies thus resulting in a disconnection between apparel retail design and store image.

In order to expand a retail footprint and maintain long term success, retailers need to focus on the customer, find ways to make business more efficient within the supply chain and be price competitive (PwC, 2012: 7). A mall consists of many retailers competing with each other under one roof. There are usually large anchor stores placed in a mall to entice customers to visit the mall, thus it is important to choose the correct location in the mall based on understanding the customer and the competition (Bhalla, 2010: 9). Only retailers that differentiate themselves from competitors will provide a convincing reason to customers to continue to purchase at their store, ensuring the stores survival (PwC, 2012: 7).

In this research, I seek to interpret how globalisation has influenced store image within the field of retail design in South Africa. The influences emerged from key searches in the literature: cultural identity, store identity, brand identity and technology, which are further discussed in this review.

2.3   Cultural Identity

Cultural identity can be social, comparative, unstable, multiple and temporary (Herrie & Wegerhoff (ed.), 2008: 222). This is further explained by Bornman (2003:25), who identified authors who state that identity is sameness and others associating cultural identity with uniqueness. Cultural identity can therefore be characterised as having difference between individuals or a group or it can be similarities between them. This is supported by Herrie & Wegerhoff (ed.) (2008) who explain that these similarities or differences can be established between gender, religion, race, ethnicity, language, political ideology, class, sexuality and age amongst people. In addition, these cultural variables can either be static or dynamic.

Bornman (2003:26) elaborates that there is a need for an individual to be unique/different, stand out from the rest and a need to fit, and find security through adaptation. These needs are still similar within a group context. However, instead of an individual identity; there is a need for a group to be different from other groups. The security blanket is provided through adaptation of identity with members of the group. There is a feeling of cohesion and unity between members of a particular group.

Group or community identification Within the social sciences, is emphasised through social processes, whereas within a cultural context, group or community identification is based on origin, culture, history. A collective culture is shared among people due to a common thread in history experiences or ancestry. This unifies people amongst all the changes occurring socially or politically, in a spatially connected space and interconnected world (Gupta and Ferguson, 1992; Bornman, 2003). Identity thus signifies the roots of a struggle, especially within this African context. It reveals our history, and continues to remain rooted in our identity in its true essence (Bornman, 2003: 26). It remains stable and unchanged due to these historical roots.

Subcultures in society preserves distinct cultures as they keep their specific characteristics intact whilst acknowledging the relation of different cultures to a specific cultural practice with in the same location. The dominant culture may refer to a language, religion/ritual, social value and/or social custom (Gupta and Ferguson, 1992: 7). Gupta and Ferguson (1992: 17 & 18) & Bornman (2003: 26) agrees that there is a specific unity between place and people through physical movement/travel and mass media. However, there is also loss of cultural distinctiveness of places and territorial roots due to ease of mobility amongst people as it provokes the ability to refuse their cultural diversity or practices.

Bornman, (2003) states that the formation of identity in the postmodern age has added issues to both a personal and collective identity. Identity has changed its shape and content due to rapid changes in a social, political, cultural, economic and physical environment (Bornman, 2003: 27). He further states that a protected identity formation requires a sense of belonging and community that is everlasting due to a life-long commitment by its members. Community provides comfort and warmth, offering relaxation and safety. One which doesn't provide conflict or uncertainty. If members of the community all have the same understanding then they will remain united, forming a community that cannot be destroyed by difference or change. Through travel and information and communication technologies, global movements have occurred, allowing people to discover other ethnic movements and religious identities (Bornman, 2003: 32). This makes it difficult to protect a community as one cannot block channels of communication. The development of transport, technology, media and communication technologies have provided an imbalance, blurring distinctions between insiders and outsiders (Bornman, 2003: 30). This has been the cause of the destruction of many traditional communities and societies.

Appadurai (1993) makes reference to the movement of all people in various cultural or ethnic groups which he refers to as "ethnoscapes". This has created a new cultural sphere that is multicultural in nature, consequential to interaction with people and place. There is therefore a need to implement boundaries between group identification and mobilisation as cultures are no longer bound by the borders of a single state (Bornman, 2003: 32).

Bornman (2003) states that despite the historical importance of our cultural roots, our cultural identity also undergoes a constant transformation that is rooted in the present rather than the past. Thus it is an interactive process that considers our full being, of our belonging due to our past and how we evolve due to the present. It is a reflection of human experience in the age of globalisation (Bornman, 2003: 27). Cultural and ethnic identities are understood through various elements and levels of these elements. Deeper cultural or ethnical roots such as language, religion or race are not easily changed, therefore they are not easily abandoned (Bornman, 2003: 40). Information and communication technologies have provided a global extension, opening up various alternatives for identity formation. Identity is now addressed on a global level rather than local level. People use technology to explore individual identities but also to strengthen ethnic, cultural and other local identities (Bornman, 2003: 41). It has given rise to a new identity that has changed in age, history, personality, appearance, personality, even gender (Bornman, 2003: 42).

Unity, language, cultural, ethnic, religious groups have remained important components of the identity structures of most South Africans since the early 1990's. Language in particular remains one of the most important denominators of sub-national identities in South Africa. Identity formation is complicated by the establishment of new forms of provincial and local government which creates new opportunities for sub-national identification (Bornman, 2003: 44).

2.3.1 Globalisation and Identity

Globalisation and identity are interconnected (Herrie & Wegerhoff (ed.), 2008: 221). Globalisation increases interconnectedness between different people and cultures but decreases the individuality of cultural identities (Khyade, 2018:85). This is due to the increase in communication across different cultures and social groups, within national and local regions. The circulation of cultures through social interactions across countries have thus caused cultural expansion (Khyade, 2018:85). This may lead to the harm of cultural diversity, as a leading country's culture is introduced into another

country through globalization. Khyade (2018) specifically mentions Westernization or Americanization of culture, where the dominating cultural concepts of economically and politically powerful Western countries spread and cause harm to local cultures and tradition.

Globalisation is not a uniform process but involves various territories, establishing various contexts, thus affecting people differently in these changing environments (Bornman, 2003: 24). Processes of distribution, production and consumption, global trade and financial services are associated with the economic sphere of globalisation. All these aspects are however also linked to changes with the social, cultural and political spheres (Bornman, 2003: 24). Political issues are also centred around individual discourse or group rights. Issues of social justice or equality also fit within identity discourse as people fight for the right to a separate identity.

Globalisation has changed the concept of cultural identity formation on both an individual and collective level (Bornman, 2003: 25). Cultural identity is complex on many levels, demanding an increase of globalisation whilst also competing with global factors (Bornman, 2003: 42). South Africa is deeply divided and diverse in society which can be identified by characteristics such as language, race, culture, religion and socio-economic differences. However, we are faced with the challenge whether to remain loyal to our current ethnic, cultural and religious groups or reinvent ourselves to form a new South African identity. South Africa has also become exposed to worldwide issues through media, and information and communication technologies. Therefore, there is a greater need to identify by contrast, provide social boundaries and confirm their ethnic and racial identity (Bornman, 2003: 43).

2.3.2   Globalisation and Tradition

Each country represents its own distinctive culture and traditions which are taken for granted, yet cultural difference, history, and social relationships should be celebrated (Gupta and Ferguson, 1992: 6). Cultures have lost their reserved space in definite places, in order to include several cultures within a national identity, thus termed multiculturalism (Gupta and Ferguson, 1992: 7).

Traditionally, societies individual identity has largely been based on their position in social circles, or the hierarchical nature of their identity determined by birth. However, due to the equality of people, traditional hierarchies have lost their significance. Individualism has acquired a new meaning within a modern age as people have

individual rights. Individual freedom emphasises that people are free to self-create, to realise their own authenticity. The emphasis falls on the individual to find fulfilment and authenticity to become whatever they want to and fulfil their own potential (Bornman, 2003: 28). Identity is thus self-constructed and open to choice. Identity is however not only an individual venture but also a collective one in which group identification occurs. Individuals make an important decision to blend in with a group that has similar identity traits. Identities can be discarded easily. People seldom commit to their identity for long periods of time, and do not accept consequence or take responsibility for the endurance of their relationship with their identity. People choose change in identity rather than sameness or continuity because this implies that they will be forfeiting other options (Bornman, 2003: 29).

Consumption and commodities have become important ways in which we as individuals can acquire or express our identity. Consumer culture has provided a platform in which relationships are created amongst people and with material things. It is also involved in social political and economic exchanges through trade and communication (Bornman, 2003: 29). Identity formation is no longer restricted to only local space, but is a complex mixture of local and global elements. This is owing to technological developments, media and digitalisation (Bornman, 2003: 30).

Due to modern culture, new forms of identity are constructed which exist far from their places of origin. Cultural experience has thus been lifted out of tradition (Herrie & Wegerhoff (ed.), 2008: 222). Identity now depends on a certain level of consistency, having commonly shared values. Switching from one cultural identity to another is not a new concept. Globalisation has distorted distinctions within our cultures due to the constantly evolving society we find ourselves in (Wheeler, 2009; Zhu & Meyers-Levy, 2009; Cuccioletta, 2001). Society has become accustomed to changes in identity, as it brings about new possibilities in a constantly changing environment (Zhu & Meyers-Levy, 2009; Herrie & Wegerhoff (ed.), 2008).

A multitude of identities are formulating through intermingling of different people and cultures (Cuccioletta, 2001: 2). Thus, identities are constantly changing and breeding into new hybrids. A new common culture is developing due to involving, encompassing, or combining elements of more than one culture (Cuccioletta, 2001: 8). In this context, it has become necessary for identities to evolve, develop, and be redesigned (Herrie & Wegerhoff (ed.), 2008: 13). it is questioned whether our culture remains pure or unique (Wheeler, 2009; Cuccioletta, 2001). Despite this, Herrie and Wegerhoff (ed.) (2008) argue that, in a post-colonial context, it is the responsibility of Africa and Africans to

rediscover their identity. It can only be defined by an understanding of ourselves and of our environment, which is not an easy or straightforward process.

Mudimbe (2003) however mentions that there are potential dangers in identifying an African identity as many of the values or difference do not stay true to its essence but rather have been derived from colonialism. Cultural purity has become lost, as these globalized issues have a distinct international personality (Mudimbe, 2003: 213). Whilst African identities find themselves intertwined with illogical and conflicting teachings about ethnicity (culture & traditions) (Mudimbe, 2003: 216). There are constant pressures to support a common denominator despite diversity. There is a mutual cohabitation and pollination of differences and extremes amongst people which have formed relationships between common cultures and humanities. Differentiation in identities and fusions of cultures have thus become stronger in the face of contemporary globalization. Mass media is one of the great contributors to the growth of culture, goods and people (Mudimbe, 2003: 217).

It is clear that the search for identity is open ended and never ending. It is complex, and will never be complete. People will continue to search for a sense of belonging as an individual or in a group. It has been changed by various aspects, not only due to the age we live in or globalised factors but a combination of all these elements. South Africa cannot escape the effects of these elements, therefore South Africa will continue to face the struggles of identity formation (Herrie and Wegerhoff (ed), 2008; Bornman, 2003; Gupta and Ferguson, 1992).

2.3.3 Globalisation in retail

Hibbert (n.d:5) investigates the impact of cultural globalisation in retailing. Through his cultural assessment he reveals that cultural characteristics can vary to a larger extent within a given society than between societies due to various elements leading to their choices such as good education or their financial means. It is therefore important that retailers, especially international based retailers are cautious when determining their target audience.

If a retailer is unsuccessful in detecting changes in cultural identity, then it could amount to failure. A cultural evaluation is vital to determine these variables but it can also be expensive. However, in the long-term, it may help to determine the correct type of marketing strategies to implement. Doing so will be advantageous as the marketing strategies implemented could more than likely be new to the retail market. There are

risks in the process to gain attraction based on culture as a common language or heritage does not guarantee a common cultural identity (Hibbert, n.d:6). Therefore, it is questioned whether or not adapting and communicating a common cultural identity would even be feasible (Hibbert, n.d:9).

Hibbert (n.d) identifies that for the United States (US) retailers, brand image is of all importance but to European retailers the importance is focused on lifestyle, quality of life and improvement thereof. This indicates the different ways in which they seek global expansion. It is clear from his study that no country can possess the same cultural characteristics and that these characteristics can influence whether a store can thrive or not in a foreign retail market.

If retailers are unable to interpret the significance of the cultural elements in the retail market, they find themselves in then this could lead to negative implications for their store (Hibbert, n.d:20). Overall, in order to expand to other countries, a retailer needs to be able to respond to change whilst still blending in with the local customs, thus accommodating for a multitude of needs. We continue to lose our unique identity as we continue to be influenced by global similarity (Herrie & Wegerhoff (ed.), 2008: 221). Hibbert (n.d) has not confirmed what this means for South Africa. And therefore further research is required to understand how globalisation has impacted retail design within a South African context.

2.4 Store Reputation

2.4.1 Store Identity

Store identity and reputation emerge through consumer interactions with the physical store (Burt & Davies, 2010: 869). Dynamic interactive experiences are produced, imagined and consumed with the focus being to engage consumers through the entire stores design and personality. This, in turn, alters consumer perceptions and attitude and gives rise to an identity (Mouhoubi, 2014; Burt & Davies, 2010).

Authenticity and originality are the current parameters for directing and creating memorable experiences (Petermans & van Cleempoel, 2009:171). Designing retail environments should be directed towards values and creation of suitable "atmospheres", as experiences are the new source for consumers and value creation (Petermans & van Cleempoel, 2009:171).

Martineau (1958) explains that no store's image can portray an equal appeal for all income brackets, social classes, age groups and all types of customers. A store can find competitive difficulties depending on its location, even if their price is right, as elements implemented in one store might appeal to a group of customers, but not be attractive to the next group. However, this is intended as each customer is different in class, type, psychological outlook of the world and in ways of life. In light of this, the retail market looks for a different emphasis to appeal to customers. Within the low to middle income bracket store, the customer might reflect the need for a functional space, appealing to values of solidity, practicality, and the economy. In the case of a high-income bracket store, the customer may seek a store providing symbolic meaning, reflecting status, portraying a lifestyle and a symbolic character. Stores need to be distinct in portraying a certain store identity to appeal to a customer's identity (Findlay & Sparks, 2002: 103).

To differentiate a store from its competitors and to help manage a perception of a company, the best identities come from advancing a brand, as clarified by Wheeler (2009:11). Exploring a holistic perspective of the brand within the retail store creates growing recognition of the store identity. A holistic experience is coherent in the look and feel of the store, whilst clearly and positively reflecting the store name and brand (Burt & Davies, 2010: 870). So, in essence, brand identity and store identity are closely linked. Retailers, therefore, have many factors to consider in order to create a memorable retail experience that encompasses the physical store, the atmosphere, the brand and the customer. These factors need to be unique in order to portray an individual store identity.

2.4.2   Brand Identity

With respect to marketing, as defined by the American Marketing Association (Wheeler, 2009), branding is seen as: *"naming, terminology, signage, symbolism or an integration of all of them, used to identify services or goods of an individual seller or group of sellers to create separation from competitors."* To build a substantial brand, focus is required on brand identity through perspectives of the brand as a person, an organisation, a symbol and a product (Fielding, 2015:11). Branding should be structured so that it can be identifiable and amplified in a way that consumers understand the branding as relevant with special added values that match their closest needs (Pettinger, 2004:171).

The goal of a brand communication strategy of a company is therefore to develop a brand image in correlation with the receiving customer (Schielke & Leudesdorff, 2014: 672). As per consumer-based cultures, people often tend to identify themselves through the products they purchase. Therefore, it is challenging for brands and retailers to present themselves inside their own communicable image (Schielke & Leudesdorff, 2014: 672). A symbolic universe, defined through brand identity and cultural perspectives, can be seen as a communicative object that brand managers want customers to buy into (Fielding, 2015:9).

Brands are aimed at specific social groups, to reflect their cultural values by creating symbolic and cultural associations through "added values". "Lifestyles", which is regarded as a vague idea, are distinguished by the contrasting of elements such as affluence, education, urbanisation, family lifecycle, ethnicity and mobility, with a combination of social and emotional concepts. The underlining sociological differences are most visible through status and social class (Pettinger, 2004: 171).

Retailers can maintain relevance and understanding of desires and values from their customers by understanding their cultural backgrounds or heritage. A design and decision-making process can be initiated from the information the retailer gains, where the information gained is based on relative research which can be integrated into culturally-understood designs (Fielding, 2015:105).

The use of branding as a multifunctional process which highlights proposed product value can transform a customer's experience. The retail store remains at the heart of a consumer relationship and thus the retail interior is no longer only a specific platform for the sale of products but also a form of brand embodiment to provide more than a destination to browse and transact (Fielding, 2015: ii).

Recent trends in retail marketing have shifted toward cultural branding, and studying these effects have become important on mid-market youth apparel brands and how these brands react in their retail interiors, respectively. As a result, retailers are having to keep abreast with various sophisticated expectations for products, services, values and environments. The ideal goal is to bridge e-commerce stores with traditional stores in an interactive and authentic way which relate to customers on a personal level (Fielding, 2015:104). Designing commercial spaces for pleasure and function, that also align to the image or brand philosophy of the occupying company, is the most challenging for a retail designer (Quartier et al., 2014:32).

Wheeler (2009:4) quotes Moira Cullen, a senior director at Global Design, in saying that design plays an important role in establishing brands. Design distinguishes and embodies the intangibles that matter most to consumers; essence, context and emotion. According to the Design Council UK (Wheeler, 2009:10), lasting competitiveness is a reward of steady investment in design. Through consistent iterations of design concepts, for a brand's retail outlet, it aids in ultimately forming a uniform image displaying a clear brand identity for customers (Scheilke & Leudesdorff, 2014: 672).

2.5 Store Image

Since the 1980's, the profession of an Interior Designer became well recognised as a discipline in its own right. During this period, the product was the focal point and store design was complementary (Quartier, 2011b: 49). This has changed during the last decade. Store design is emphasized in retailer differentiation strategies and positioning. Quartier (2011b: 49) states that in flagship stores, visual appearance matters more than commercial attributes. However, Janse van Noordwyk's store image model does not place importance specifically on flagship stores. It is not hierarchical list, as it only presents retail design attributes that have contributed to store image.

Martineau (1958: 48) was among the first to define store image. He referred to store image as the personality of the store. The way in which the store is defined or perceived by the consumer due to the functional and psychological or emotional qualities of the store. Also, by Schlosser (1998: 348), store image is defined as responses to store attributes perceived by consumers both in functional quality and psychological or emotional in nature.

Kaul (2016), identifies three broad components of store image, namely: the consumer who perceives the store, the process of perception and the store that is perceived by the consumer (Kaul, 2016: 6). The process of perception is defined by the how store attributes are interpreted by the consumer, influenced by the environment, which may vary depending on the various aspects implemented (Kaul, 2016: 14).

Store image is multisensory, as consumers perceive the store based on the experience influenced by intangible and tangible store design elements. The configuration of store image attributes is characterised as having several core facets due to the dynamics of its development and formation (Mazursky & Jacoby, 2005: 162). Therefore, the holistic perspective of store image can evoke emotions, feelings and aesthetic appeals.

A successful retailer requires a distinct and consistent store image. It should be embedded in the customers' mind once visiting the store, and the apparel offered should also entice them to return to the store. The image of the store should be different to that of its competitor. Consistency in store image increases the recall of the brand (Bhalla, 2010: 31).

In today's global market, it has become difficult for retailers and brands to compete. New customer experiences and the desire for differentiation has always been yearned for (Quartier, 2011b: 50). Mindful of competition merchandise, store design becomes more significant than the merchandise (Quartier, 2011b: 49). A consumer may choose a specific store by the particular image it conveys, thus making it a key determining factor (van der Vyver, 2008: 19). Corporate imagery adds a desired symbolic aspect to shopping and therefore the corporate image is imitated through the store's image to encourage associated customers. In the end, store choice becomes more important than the product choice.

Van der Vyver (2008) and Quartier (2011a) both recognise that retailers need to find new ways to design their stores in order to create differentiation between competitors and provide new customer experiences. Quartier (2011a: 49) states that it is guaranteed in the retail industry that consumers will always be searching for new experiences where the design of the store becomes more important than the merchandise. As a result of this, creating an unique environment can become a necessity for customer binding. Van der Vyver (2008:19) mentions that quality products and services are easily copied or seen as a given, therefore other methods should be identified to differentiate them from the competition and gain supremacy in the mind of the consumer. The particular image that a store conveys might therefore be the key determining factor when a consumer chooses a store.

Lee (2008) summarises the many researchers who have considered self-image in playing a crucial role in store image. He mentions that consumers seek out retail stores that closely relate to their own self-image. A store's image can be more directly communicative and appeal to a specific target market through an understanding of the consumer's identity. Updating retail stores projects, a favourable store image which can assist stores in successfully competing with other stores (Lee, 2008:5). However, one cannot only invest in changes without examining the economic and environmental impact on retailers expected to make regular changes to the design, of their stores (Lee, 2008:3).

Morgan (2011) states that, in the retail industry, it is guaranteed that there will always be customers looking for that unique consumer experience, Shopping is a social activity and consumers seek to explore new social trends which are constantly developing (Morgan, 2011:15). Retailers should comprehend the significance of store image for the possibilities it could provide in the competitive retail market. In so doing, retailers need to understand the multiple aspects that influence store image in the globally-influenced world we live in before attempting to replicate this image and position it elsewhere (Burt & Carralero-Encinas, 2000: 8). Understanding the various store image attributes that are incorporated in the design of the store is vital for retailers. This could help in determining which exact elements of the store design requires changes, and to what extent, without investing in unnecessary changes for the entire store. This is something to consider as retailers do not see change in store design as economically viable, yet research states how important this is in order to remain competitive in the retail industry. By understanding how global factors have influenced store image in South Africa, retail design could help retailers understand the importance of design in the retail industry. It can be used to change their store image and thrive in the South African retail industry.

2.6   Atmosphere

There are several aspects, in the design of a retail store, which require consideration to encompass aesthetics in both interior and layout of the retail environment created. In order to satisfy consumer needs when designing a retail store, the designer's awareness of tangible and intangible design elements have to be considered in the store.

Tangible retail design elements are the use of fixed, material cues in the design of the store. Intangible retail design elements are immaterial cues. Both the tangible and intangible effects on a consumer's perception are design elements which affect the consumer's experience and influences their overall opinion and evaluation of the store, but in different ways. Tangible retail design elements can be the floor finish, the fixtures, store façade. Intangible retail design is made up of elements that create a multisensory experience through the use of music, scents, colours, and designing a store layout that creates ease of mobility in the store instead of feeling crowded or uncomfortable (Petermans & van Cleempoel, 2010:23).

There are certain retail design elements that are not as clear-cut, such as lighting. Lighting features as a visible, tangible, material design element and can also be

intangible in the way it influences the stores atmosphere due to its positioning, type and amount placed within certain areas in the store. If used successfully it can draw customers to the merchandise, entice them to choose more than one item and direct them to point of sales to purchase (Petermans & van Cleempoel, 2010:23).

For a designer, an element such as lighting can provide a number of retail design opportunities or possibilities such as effectiveness, sustainability of the designed lighting plan and practicality. The lighting plan can also offer commercial possibilities. Consumers tend to be drawn towards illuminated objects. Therefore, lighting provides an opportunity for highlighting specific zones or products in visual merchandising units within the store (Petermans & van Cleempoel, 2010:23). Acknowledging all these elements that need to be incorporated in a store design can be challenging for an interior designer.

The cost becomes apparent in a stores design as it is entirely based on a stipulated budget. With a limited budget; the choice of developing a retail store design would focus mainly on intangible design elements. It can offer many possibilities in affecting the multisensory experience for its customers rather than spending more money on changing the tangible (Petermans & van Cleempoel, 2010:24).

Apparel store-based retailers face competition daily from magazines, catalogues, television, internet and other technological advancements. To remain competitive as a strong retail brand in the apparel market, retailers have to be open-minded and willing to implement changes and not be easily swayed by globalised influences (Paulins and Geistfeld, 2003: 371). Consumers who are pleased with a retail store environment that meets their needs and wants; will return (Petermans & van Cleempoel, 2010:24).

2.6.1 Store Interior (Tangible Design)

It has been widely accepted, that customers do not merely react to the product or rendered services when making a purchase. A main contributing feature is the location, or place, where such services were received or products bought. Physical surroundings, rather than social environment, is regarded as a tangible factor that could engage or undermine customers in a retail setting (Mouhoubi, 2014: 28). As such, a physical surrounding, setting or place's atmosphere can be more persuasive than a product (Kotler, 1974).

Store interior is defined as a term comprising of a number of factors in physical store characteristics. Firstly, there are design factors which are made up of store environmental elements (Baker et al., 1994:330). Store environmental elements are visual and broken up into two parts; functional and/or aesthetic (Baker et al., 1994:330). Comfort, layout and privacy are included in functional elements with colour, materials, style and architecture included in aesthetic elements (Baker et al., 1994:330). These factors can alter the satisfaction and perception of the consumer (Babin et al., 2003:541).

Innovative store design can result in many benefits for a store, such as increased convenience, customer excitement, staff efficiency and product protection (Mouhoubi, 2014:16). The important roles of a retail environment are its function, selection and store variables which match in functional needs (Seo, 2013:20).

Functional, spatial and design variables are the primary interacting influences on a task-oriented shopper. The "cluttered" or "spacious" perception, of a customer toward a store, can be influenced by the configuration of its tangible elements; represented physically by means of displays. A layout leaning toward spaciousness becomes a necessity when customers are task oriented rather than having a cluttered layout. Sight overview and free-movement, in the store environment, are imperative aspects in the search for a specific item as task-oriented shoppers appreciate and profit from well organised spacious layouts (van Rompay et al., 2011:6).

Shopping pleasure can be negatively impacted when physical obstructions such as columns, which reduce control and wayfinding, are found within the shopping aisles as this reduces free movement within an environment (van Rompay et al., 2011:6). Negative effects resulting from uncontrollable variables, such as crowding, can be counteracted through the use of informed and purpose-designed, tangible, fixed store inclusions (van Rompay et al., 2011:16).

Always providing customers with a well-maintained physical environment results in a good impression and reflects positively on the image of the built environment (Mouhoubi, 2014: 20). Furthermore, a clean and well-lit shopping environment has a positive impact, for customer and employees, towards feelings of safety (Mouhoubi, 2014:23).

Décor can serve as a socially communicative function in the design. This can be seen in interior home design, where social status, ethnic identity and self-concept can be

expressed through home décor. Similarly, store décor can communicate its personality to the consumers to portray a store image of a particular social status or identity (Schlosser, 1998: 347).

Building personal relationships with consumers, to provide the feeling of allegiance with the brand or store, can result in value for retailers. In attaining this goal, retailers and designers are to understand the importance of designing engaging retail environments to create memorable experiences for the customer (Petermans & Van Cleempoel, 2009:172). Thus, store design affects the consumers in-store experiences and their behavioural intentions (van Rompay et al., 2011:15).

2.6.2 Store Atmosphere (Intangible Design)

Store atmosphere cannot be classified in a list of physical in-store variables, neither can it be conceptualised as a single unit but rather multi-dimensional (Donovan & Rossiter, 1982:35). It is the quality of a surrounding space, made up of a set of dimensions which are evoked through the senses to produce a specific image. It is defined as the ambient factors of the store environment which are background conditions and non-visual (Baker et al., 1994:330).

Store image and store atmosphere are strongly connected as the store environment is seen as one of the antecedents of store image. Consumers interact with retail environments in which designers have taken atmospheric elements into consideration (Baker et al., 1994: 328). Several studies have acknowledged store atmosphere as an important factor within retail environments. These studies have assessed and noted the influence of specific attributes of the store environment on customer behaviour. Such attributes assessed include music (Baker et al., 2002), lighting, colour (Baumstarck & Park, 2010), smell (Chebat & Michon, 2003), crowding and temperature (Bitner, 1990).

In the current economy, the importance of experience has become a realisation, therefore creating atmospheres which are persuasive (Lee, 2008; Kotler,1974). There are however, there are several limitations to the acknowledgement of its vital role in retail environments and how store atmosphere affects shopping behaviour within the store (Donovan & Rossiter, 1982:35). Specific responses, utilising atmospherics, can be produced from consumers through the efforts of designing retail environments in order to enhance the purchase probability (Kotler, 1974: 50). It consciously and intentionally sways the consumers purchasing intentions or decisions through

environmental cues (Lee, 2008; Darden & Babin, 1994). The positive outcome of designing successful physical surroundings would mean that the space evokes pleasant feelings (Lee, 2008:33).

Kotler (1974) focuses his views on various marketing tools in buying environments. He strongly encourages the use of the senses in retail design. He explains that the product, itself, can become less significant than the atmosphere it is in; as the atmosphere becomes more communicative and influential. He utilises the term "total design" which is the idea of adopting a unified design language which is consistent and effective throughout a space. This language is not always tangible therefore he terms it a communicative "silent language" which embodies spatial, temporal and body language. Store atmosphere is thus a less direct approach in communicating with customers.

Designing retail environments that create influential retail atmospheres can produce personal and memorable experiences for the customer. In the interior spatial sense, retail designers can also use atmospherics as communication tools and visual stimuli (Petermans & van Cleempoel, 2010:26). In the past, luring consumers through aesthetic shopping experiences has been ignored and not found to be of importance. Instead, many still choose to rely on sale incentive strategies (Schlosser, 1998: 346). It is not fully recognised that it is inadequate to solely rely on sale incentive strategies in an increasingly competitive market we face today (Schlosser, 1998: 346).

The environmental cues developed in store image are seen to have significant impact on the overall store image due to the emotional quality it possesses and effect decision making, by creating positive views about the merchandise and service quality (Lee, 2008:4). As designers, we are able to manipulate in-store elements such as climate, music, scent and appearance to stimulate positive consumer reactions (Babin et al., 2003:541). All these in-store elements can be combined to create a positive atmosphere, offering a multitude of stimuli for consumers to engage with (Baker et al., 1994:329).

The target market can clearly be conveyed through image advertising throughout the store yet atmosphere can also silently communicate the same social class through store experience (Schlosser, 1998: 347). Stores have become difficult to differentiate from each other; therefore, it would benefit stores to improve their atmosphere rather than solely depend on promotional advertising techniques to attract consumers. By implementing this; it becomes a nonverbal communication of the environment (Bitner, 1992:62).

If the atmosphere created in a store is more prestigious, then it will significantly affect a customer's perceptions of the brand and the quality of the products on offer. Store atmosphere can serve to create social identity appeal or function (Schlosser, 1998: 364). Schlosser (1998) confirms, that the social identity of the store can be communicated via atmosphere rather than useful product information, thereby largely influencing consumer perceptions of the quality of social identity. A unique store atmosphere has a greater influence on social identity and store decision (Schlosser, 1998: 363).

According to Kotler (1974) there are five dimensions or sensory channels for atmosphere: visual, aural, olfactory, tactile and taste. These can be paired with dimensions such as: visual atmosphere - shapes, brightness, colour and size, aural atmosphere - pitch and volume, olfactory atmosphere - freshness and scent and tactile - tactile temperature, smoothness and softness. The final sense; taste, is not something that can always be included a retail environment but certain aspects in the environment can activate remembered tastes (Kotler, 1974: 51). Kotler identifies distinctions in atmospheres, intended and perceived. The intended atmosphere is the space designed through implementation of sensory qualities. The perceived atmosphere is how the consumer perceives the intended space. The perception of consumers can vary for each sensory aspect. Different customers react and respond differently to each atmospheric dimension as they all have their own preference due to their own individual identities (Kotler, 1974: 52).

Developing the appropriate atmosphere is important as the space becomes characterised by the certain sensory qualities incorporated and the consumer perceives only certain qualities of this designed space. Only favourable reactions contribute and lead to favourable purchasing probabilities (Kotler, 1974: 54).

Through attaching unique associations to the quality of the store environment, retailers can create a unique brand image which provides rich consumer experiences. Due to the competitive retail industry, retailers must continue to evaluate their atmospherics as it can wear out over time due to competitive developments. They must be alert as atmospheres call for revision within three major forms; the exterior of the place, interior of the space and the visual merchandising within it (Kotler, 1974: 62).

Researchers believe there is a science to shopping through a specific process of first seeing, touching and feeling before purchasing. Retailers are determined in designing

retail environments using this process structure in order to maximize customer purchasing (Li, 2010:42). However, there are other senses which are forgotten. Smell; part of the five senses, is recognised as the closest sense linked to emotional reactions in humans. Therefore, smell is particularly alluring to shoppers as it can be associated with memory in order to gain a positive or negative response. In turn, this sense affects the consumer's perception toward a store, based on the received psychological interest (Michon et al., 2005:577). The strength of the odour becomes important, as an overpowering pleasant or unpleasant odour could become unbearable, and effect store image negatively (Bhalla, 2010: 36).

When adding music to a retail environment, it is seen as adding a favourable feature in creating a more positive shopping environment (Grewal et al., 2003:262). Incorporating appropriate music into the atmospherics of the store can be used to entertain and distract customers (Bhalla, 2010: 35). Music can influence consumer's perceptions of time spent waiting in store perhaps whilst queuing at a pay point (Baker et al., 2002: 128). It is used in the retail store to promote purchasing, to remind customers of a special season or holiday or just create a mood (Bhalla, 2010: 35). This creates a perception that a store environment without music won't be seen as favourable when compared to a store environment favoured with music (Grewal et al., 2003: 263). Other than music, general noise in store also plays a role in creating a comfortable environment. If the noise in store is too loud it may cause discomfort.

Air quality and ambient temperature could also cause discomfort, especially if a space is crowded. A crowded space can cause the temperature of a room to be higher than usual. The incorrect use of lighting or an overuse of lighting in certain areas of a store could also increase the store temperature causing discomfort or create glares which may decrease the ability for the consumer to see merchandise or displayed information clearly in store. A direct influence may be assumed from those physical responses in relation to whether or not people stay in and enjoy a particular environment (Bitner, 1992:64).

When aiming to draw customers and increase market opportunity, in retail design, the precise use of light and colour also form part of these design techniques. Results have shown that use of various colour and lighting conditions substantially influence the impressions of space and retail identity (Tantanatewin & Inkarojrit, 2016: 197). Often it is these elements that entices the consumer and develops their first impression of the retail environment and are likely to significantly impact store image (Schlosser, 1998: 346). To enhance the environment, more than one of these elements need to be

considered to influence consumers in a positive manner (Bitner, 1992:61). This is significant as a positively viewed store environment and overall pleasant experience may determine the time and money spent by consumers in the store and can also encourage consumers to return frequently, for longer visits and spend more (Donovan, 1994: 283). Appealing atmospheric experiences can thus be the difference in determining whether the store is a success or not (Lee, 2008:2).

2.7 Convenience (Shopping Ease)

Ease of convenience is accomplished when obstacles to complete activities are reduced or eliminated, thus making the activity more enjoyable (Clulow and Reimers, 2009:126). It is understood that convenience is becoming increasingly significant; particularly to consumers and retailing (Berry et al., 2002:1). However, there are many forms of convenience that encompasses the shopping experience (Clulow and Reimers, 2009:127).

During a visit to a store, a customer has to consider two essential "costs": time and effort (Seiders et al., 2007). The literature on time is multidisciplinary in nature because time is characterised as a limited and scarce resource (Berry et al., 2002:2). Time and effort are closely connected to economic theory because the more time and effort spent to obtain a product reduces the desire for consumers to purchase (Berry et al., 2002:2). Consumers want quick and easy shopping excursions from pre-purchase to post-purchase. The more effort a consumer exerts in purchasing the more the consumer expects in return (Berry et al., 2002:2). Successful retailers are those who enable speed and ease for their consumers. Thus, convenience is deemed as the encompassing of all attributes which can minimize time and effort when designing a store (Reimers, 2014; Seiders et al., 2000).

Farquhar and Rowley, (2009) states that the number of dimensions' convenience consists of needs to be developed to define store image as it is becoming ever more important in affecting consumer experiences and store identities (Farquhar & Rowley, 2009: 430). Store convenience can be designed and managed to achieve a valued experience for the consumer (Farquhar & Rowley, 2009: 429). Therefore, it is no longer just about saving the consumer time and effort but allowing the store to gain value through the experiences made for the consumer at more than one level (Farquhar & Rowley, 2009: 435).

Shopping centres granting access to a variety of stores at one place has become the more common route for shoppers. The ease of movement between stores in a larger shopping environment, including the reduced out-of-vehicle walk time, are contributions that attract consumers to retail shopping centres (Reimers & Clulow, 2004:208). In a shopping centre, location and distance still play a role in spatial convenience in two ways; proximity and location to other associated retailers (Reimers & Clulow, 2004:209). Consumers are reluctant to walk excessive distances in shopping centres as they are reluctant to exert themselves (Reimers & Clulow, 2004:208). This is ironic as shopping centres are designed for high pedestrian flow therefore customers need to be physically capable to walk to all areas of a shopping centre (Reimers & Clulow, 2004:210).

The distance that a consumer must travel to a store, including the location of it, plays a role in making store choice decisions. However, with the suburban areas we live in today, greater driving distances are inevitable and easy access to online retailers has made location and distance somewhat more complicated and highly affect store choices (Ailawadi & Keller, 2004: 4).

All shopping centres are designed a particular way to accommodate for various types of functions but the flow of these functionalities should not disrupt traffic flow. To achieve this, core functions are centrally placed and non-retail functions are located externally or near entrances. Core functions are seen as priority where fashion stores are concentrated for compatibility and competitiveness (Reimers & Clulow, 2004:211). It is usually the key attractors in the highest level of retail comparison (Reimers and Clulow, 2004:213).

When a retailer chooses to locate itself in a mall, there are medium to high rents for retailers to choose from depending on the convenience of location for higher customer traffic, resulting in higher purchase opportunities. There is also less operational freedom in a mall as rules and regulations are dictated by mall management (Bhalla, 2010: 7).

Positive relationships are expected through competitive intensity as consumers enjoy closer proximity and easier access, whilst competitors benefit by gaining more customers through shopping synergies (Seiders et al., 2007: 150). Globalisation has influenced the placement of stores within malls due to the interconnected nature in which they are similar, grouping similar competing stores in order to provide

convenience for customers. However, this does not guarantee a stores survival as globalisation only further increases competitive probabilities.

In a retail store, there are several ways in which spatial convenience can be achieved. (Reimers & Clulow, 2004:208). Crowding is a factor that is caused by spatial inconvenience and largely affects which retail stores shoppers select. There are two types of crowding; human and spatial crowding, however, both may have negative influences on shopping experience satisfaction through creating an overall unpleasant experience for shoppers (Grewal et al., 2003: 261).

The retail density in a store can cause disturbances preventing the shopper from fully experiencing the store and enjoying shopping within the store. If the customer intentionally came to a store to find a specific item then they might be more sensitive to crowding and density and could become frustrated (Michon et al., 2005:581).

The store layout and size affect the capacity for high volumes of traffic within a store (Grewal et al., 2003: 261). A structured store layout and both interactive and attractive methods of displaying merchandise can creatively address crowding and alter consumers' perceptions of the store atmosphere (Bitner, 1992:61). Consumers will only view a store negatively if they do not feel comfortable. A store design and the atmosphere it creates can lead to comfortable spatial convenience (Grewal et al., 2003: 262).

Consumers have the need for the point of sales to be effective and convenient. If waiting is required in-store, then consumers appreciate having seating especially when accompanied by children or partners (Janse van Noordwyk, 2002: 89). The longer a customer waits in a store, the more unpleasant their experience becomes and their evaluation of the store atmosphere depreciates. Making customers wait can cost sales and profit losses but having to invest money in hiring more people or upgrading technology in the store can also lead to great cost implications for the store (Grewal et al., 2003: 265).

Clulow and Reimers (2009) identified in their research that comfort plays an important role in creating shopping ease. Comfort is a blanket term which is linked to security, cleanliness, parking, mall size, one stop shopping, climate control, shopping services and interior design; explaining the greatest variance with convenience (Clulow & Reimers, 2009: 130). Due to the many factors that encompass store convenience, the concept requires constant revisiting to further the understanding of its all-

encompassing nature in retail (Farquhar & Rowley, 2009: 425). What is clear is that convenience is all about addressing the consumers' needs and wants in order to create a memorable shopping experience. In turn, shopping enjoyment will promote an increase in sales and provide profitable outcomes for retailers.

2.8   Facilities

2.8.1 Store Layout

The layout of a store indicates the ways in which various sized or shaped visual merchandising displays, furnishings and other equipment are arranged within a retail store. Among them, they not only offer visual cues and recreate spatial relationships but their functionality plays a particularly important role in order to facilitate successful performance within the store (Baker et al, 2002; Bitner, 1992).

The success of a store layout is also dependant on the store's clear identity, the ease of finding the merchandise and the ease of orientating oneself through clear separation of different sections. Consumers want to feel like they have personal control in store but retailers want consumers to be enticed to browse and buy on impulse (Lee, 2008:13). Due to store expansion being costly and often too challenging, total floor space remains fixed (Mantrala et al., 2009: 71). Many retailers choose to expose customers by maximising merchandise in limited space and time (Mantrala et al., 2009; Lee, 2008). It is typically seen that retailers' group certain products within a category to allow for increased ease of shopping for consumers. However, in some settings, complementary merchandise is placed together to influence bundling strategies and encourage impulse buying (Mantrala et al., 2009:75). Thus, a well-developed store layout design, and enabling considered utilisation of floor space, becomes an important element in order to ensure that customers explore the merchandise (Li, 2010; Mantrala et al., 2009; Lee, 2008).

The dimensions of occupied floor space can have a strong influence on aisle structures, in-store traffic patterns, shopping atmosphere and operational efficiency. There are effective store layout patterns that have been discovered by researchers through analysis of consumer traffic patterns in store. These patterns have become an integral part of store layout design, such as consumers navigating the store in a counter clockwise direction; with their attention concentrated on the wall sides. Consumers tend to avoid turns that attempt to divert the route in which they are going. They want aisles that are wide enough, offering clear views of the merchandise, making it is easier to

find merchandise. In order for this to occur, the retailer and its designers need to consider several characteristics of store layout design (Li, 2010; Lee, 2008).

Store layout, overall visibility and merchandising are also acknowledged as obstacles or facilitators of shoplifters' intentions. Store design, and arrangement of the physical environment, can influence consumer behaviour. Additionally, the physical feature arrangements can dampen the encouragement of criminal opportunity by increasing overall supervision and denying access to possible offenders. Thus, the retail interior plays an integral role in crime prevention (Mouhoubi, 2014: 11).

2.8.2 Store Appearance

Bhalla, (2010:46) explains that essential features of the physical nature of a store encompass the appearance and design of its exterior. Signage, architecture and maintenance, which form part of the exterior design, play an integral role in forming and developing a store quality perception and its ability to entice customers. It is such that a customer may choose not to enter a store simply based on external appearance, as it may influence expectations of the interior. The importance of a quality store front can play a major role, especially for a first-time customer, and cannot afford to be underestimated. The face of a store is its store front and designing the façade to emphasise the store image will result in maximum impact (Bhalla, 2010; Janse van Noordwyk, 2002).

When a store's interior, and exterior signage, are clean, clear and accessible with the window display being inviting and presentable, the store can be identified from a distance (Bhalla, 2010:46). Depending on the positioning and personality of the brand, and based on the store front, the customer will derive a personal opinion. To attract consumers, a store front needs to differentiate from competition and effectively communicate what it stands for (Bhalla, 2010:48).

A common feature, to different types of stores, is communication with store customers through window displays. Window displays can provide vital information to customers pertaining to events and offers. One of the main functions of the store window is to promote the store image and aid in maximizing the sale of its merchandise (Bhalla, 2010:50).

Internationally, Morgan (2011) discusses the history and importance of visual merchandising and window displays from a global perspective. He mentions top

international brands success in retail design and how window displays create a retail design experience for stores such as Zara, Louis Vuitton and Top Shop. Window display has become an integral retailing visual communication tool as it can convey store image and brand attributes to a potential consumer. It is particularly useful when promoting new products, advertising sales and developing brands into well-known brands. Specific merchandise is carefully selected for window displays in order to contribute to a successful sale of those items (Lee, 2008:15). Lee (2008) states that window displays are styled and designed to contribute to an overall store image. The execution in design of the feature display, choosing the correct fixtures, featuring the latest or trendiest products can all be used to capture the interest of the customer, and he also acknowledges that window displays can be used as a physical exhibiting tool to show off merchandise.

Bhalla (2010:51) identifies that the merchandise story is promoted in the window display as various aspects, such as simplicity, cleanliness, frequent changes, lighting, emphasis on items, display heights, repetition of colours and shapes for attraction, continue the displayed theme within the store displays. The mannequins in windows have continued to be a successful tool in shop windows all over the world as it can be used to display the latest trends in the same manner from store to store at the same branded store (Morgan, 2011:15). Zara, a Spanish fashion brand store, is well recognised for their successful traditional window displaying techniques (Morgan, 2011:15).

Overall, to create unique environments and compelling experiences, the collaboration between client development teams and industry professionals, such as designers, contractors, engineers and various experts, is essential (Wheeler, 2009:164). The quality of the materials used in the construction of the store exterior, such as displays, finishes, floor coverings, ceilings and any objects or display pieces included in the window display, can communicate to the consumer and create an overall aesthetic impression (Bitner, 1992:66).

2.8.3 Fitting Rooms

The atmospherics are often overlooked for fitting room designs, yet the fitting room is a facility in a retail store where the actual sale is made, it affects the consumer's perception and purchasing decision. Retailers may lose sales when consumers shopping experiences are negatively affected by the atmospherics of the store. Therefore, the purchase decision process needs to be affected by a positive fitting room

design experience to result in an increase in sales (Seo & Fiore, 2016; Seo, 2013; Baumstarck & Park, 2010).

The shopping experience can be influenced socially, aesthetically or physiologically (Yun.,et al, 2015:2). Shopping, itself, is an experience for the consumer that often induces pleasure or enjoyment. There is an ambition to find a product they like within an aesthetically pleasing store. Their senses are stimulated by experiencing the store, its people and its products. The social aspect involves interaction with people. This could be friends or family who might join for the shopping experience. The sensory experience brings about emotional and cognitive responses with both social interaction and aesthetic experience (Yun.,et al, 2015:3).

There are many factors that can affect consumer interactions within this vital area of the store (Baumstarck & Park, 2010:37). The physical environment of the fitting room design involves lighting, size, mirrors, hooks, chairs for sitting and placing one's belongings, door locks and cleanliness (Seo, 2013: 21). Baumstarck and Park (2010) identified the effect of fitting room lighting on consumers' emotional evaluation. They mention that consumers evaluate their experience based on environmental cues such as size, convenience, cleanliness and privacy but there are also design cues which can define space such as floor finishes, wall finishes, fixtures, mirrors, door or curtain type, seating etcetera (Baumstarck & Park, 2010:39).

Kang (2015) acknowledged consumers' psychological experiences in fitting rooms. Specifically noting that mirrors and lighting can affect customer's satisfaction of the product through their self-appearance, thus influencing their purchasing decision. Inadequate lighting plays a considerable role in appearance of garments (Seo & Fiore, 2016:16) Good lighting choices can provide the consumer confidence in their purchasing selection. It is important to note the lighting intensity, the positioning and type of lighting chosen. Lighting can allow the consumer to look favourable when trying on clothes and can be incorporated by a mirror for illumination of the entire body (Baumstarck & Park, 2010: 38). Seo and Fiore (2016), suggests colour-correcting Metal-Halide or fluorescent bulbs to improve colour rendering and enhance physical attractiveness, and that wall sconces or lights around the mirror provide a more flattering look than overhead lighting. When lighting is positioned above the consumer in a fitting room, it can cast unattractive shadows on the consumers face. Standard fluorescent lighting is not ideal as it contains warm tones which can alter the colour of the garment or consumers skin tone. The colour correcting Metal-Halide bulbs and

linear fluorescent sources makes colour clearer and enhances it to appear more flattering (Seo & Fiore, 2016; Seo, 2013).

Many retailers limit space for fitting rooms as it is usually an afterthought. However, size of the fitting room cubicles, doorways and width of the aisles can influence the overall experience. When these elements are narrow then it can detract from the shopping experience. A large fitting room area and cubicle can accommodate for socialisation, as friends or relatives often accompany the consumer (Seo & Fiore, 2016:16).

Mirrors provide the consumer an opportunity to see how the garment fits and looks on them from various viewpoints. A three-way mirror rimmed with light is sufficient to allow for this assessment. The mirrors should always be full length to provide a complete view of the customer, including their feet to accurately assess their appearance (Seo, 2013: 25).

Despite the costly nature in implementing all these fitting room features, there are also benefits due to the overall impact they can have on satisfaction ratings for the shopping experience (Seo & Fiore, 2016:16). The overall experience of a retail store involves consumer interaction with atmospheric variables such as these throughout the store. Therefore, a fitting room design alone cannot define an overall experience but it can create a positive experience for one single and vital part of the purchase process within the store (Baumstarck & Park, 2010:37).

2.8.4   Fittings and Fixtures

Lighting is considered an atmospheric cue but also a design fitting which can be used to manipulate an entire store experience. Different combinations of lighting can create favourable impressions of space such as achieve spaciousness, privacy, visual clarity and even affect emotions (Baumstarck and Park, 2010:38).

Lighting is an important fitting in a retail store as it provides ambience, illumination, accentuates merchandise and attracts the customer's attention. The different variance of lighting conditions and direction need to be understood in order for it to influence emotions, enhance personal appearance or improve spatial quality (Baumstarck and Park, 2010:38). Aspects, such as the arrangement, brightness, type, uniformity and contrast, all play a role in the selection process. The lighting arrangement, brightness

levels and colour affect the overall impression of the retail space (Tantanatewin and Inkarojrit, 2016: 198).

The lighting quality creates a mood that is consistent with the function of each space, providing spatial clarity, and endorsing productivity (Mouhoubi, 2014:34). To achieve good illumination, different light intensity and colour rendering temperatures should be considered. The light wattage levels should be noted to either reduce shadows or avoid excessive glare (Mouhoubi, 2014:4). Investment in good lighting can affect consumers' confidence in the perceived safety of the store. A dim lit store is considered less safe than a well-lit one (Mouhoubi, 2014: iii).

There are ways in which fixtures can also be designed to better deter crime and enhance safety and security in a retail store. Height of store fixtures can affect consumers' state and shopping experience. Enhancing visibility by lowering shelves can create a welcoming space (Mouhoubi, 2014:22). Low height shelving elicits more pleasant emotions than high shelf height (Mouhoubi, 2014: iii). Design elements, such as in store fixed displays, should not block instore viewing. Mirrors assist in keeping paths clear and open and improving the experience for consumers (Mouhoubi, 2014:13). Low shelf displays assist in providing safety and entices customers to engage with the merchandise (Mouhoubi, 2014:3). Overall, both fixtures and fittings utilised and integrated in the store design is significant as it can add to the store interior and atmosphere (Findlay & Sparks, 2002:105).

2.9   Merchandise

2.9.1 Style

The world of design has become strongly connected to markets, money and merchandising due to design and fashion being so closely connected (Appadurai, 2010: 256). McLuhan (1994) identifies the clothing industry as a powerful organization. He views fashion as a way to ascertain our relationship with the world and our identity as it effects sensory change and our ability to continue to develop in a developing world. Fiore & McLuhan, (2001) states: *"Clothing is power and the organization of human energy, both private and corporate"*.

Janse van Noordwyk (2008:66) identifies merchandise style as contributing store image dimension to consumer preference. Consumers are more informed due to technological developments and therefore insist on having more merchandise options that meet their individual needs or preferences. The highly competitive market has led

to shorter production cycles making it progressively challenging to create and to sustain a competitive advantage (Richardson, 1996: 400). Merchandise styles can easily be imitated, making it difficult to produce variety and make rapid product changes (Richardson, 1996: 402). Janse van Noordwyk (2008:66) points out that retailers need to respond to consumer merchandise needs and preferences in order to gain and maintain their competitive advantage.

By incorporating own private label products, many stores try to create differentiation or be branded under the name of the retailer. In this way, it allows for differentiation between competing retailers and unifies a brand image. It is thus critical for the brand assortment being sold by the retailer to relate to that store's image (Ailawadi & Keller, 2004:3). This creates perceived differentiation in variety or assortment for apparel sold in that store which directly relates to how unique the store brand is. It through this that consumers become brand loyal (Ailawadi & Keller, 2004:12). Overall, Janse van Noordwyk (2008) mentions that consumer preference is driven by the store experience created. The store environment is associated with sensory change that McLuhan acknowledges, this in turn influences consumer behaviour. Thus, differentiation is merchandise style and store image are vital for retailers in maintaining a competitive advantage.

2.9.2   Quality

Ailawadi and Keller (2004) identify store atmosphere as a dimension of store image much like van der Vyver (2008). They also refer to Baker et al (2002) and Schlosser (1998) who have positioned their research within store atmosphere and social identity.

Baker et al., (2002) found that: *"Store environment factors, particularly physical design perceptions, significantly affect consumers' perceptions of merchandise price, merchandise quality, and employee service quality."*

According to Schlosser (1998:345), a pleasing environment created through atmospheric features serves as a social function which positively alters the quality perception of merchandise and, through this, affects the overall store image. An appealing in-store design and atmosphere alters consumer perception enabling them to view quality merchandise and associate this quality with higher prices. This same appealing in-store atmosphere can be manipulated to craft a unique store image through design in order to establish differentiation. The brand image of the store can be used to position a store in a competitive retail industry. The retailers with a strong

store image have the ability to sustain themselves even if their apparel or products sold are similar to competitors' because the design of the retail store environment changes consumers evaluations of merchandise quality for the better. Therefore, creating a strong in-store experience; plays a pivotal role in establishing retailer brand equity (Ailawadi & Keller, 2004: 6).

Private labels can be viewed in greater quality if placed in an aesthetically pleasing environment but the same view cannot be placed for national brand quality due to the nature of the stock (Ailawadi & Keller, 2004: 6). Retailers who choose to stock a private label derived from high quality manufacturing brands ensures that their overall store image is strengthened as consumer perceptions towards high quality products is viewed favourably (Ailawadi & Keller, 2004: 18). A private label's quality is strengthened through consistent package design and through a wide range of products to enforce a well-managed unique retail brand in quality, style and texture. A national brands quality, style and texture is commonly placed in many departments stores across a larger spanning area or region in order to rapidly reach a larger consumer base. However, it is often difficult to create differentiation between these stores due to the combination of both national and private labels in one envelope (Vahie & Paswan, 2006:67).

In the discussion of label brand image versus store image, Vahie and Paswan (2006:69) believe that brands without an influencing store name to back them, do not fare as well as those who do have a perceived better influencing store name, experience or quality of merchandise to back them. The store's name offers rich information about the brand image. There must be a consistency between the name, the intended projected image and the quality of the merchandise (Grewal et al., 1998:347). These aspects link to one another to create a holistic experience thus influencing store image within retail design. (Grewal et al., 1998:347).

2.10 Promotion

2.10.1 Consumerism and marketing

Appadurai, (2010); Van Der Vyver, (2008); Kotler, (2002); and McLuhan, (2001) underline that the relationship and interaction with the consumer has become the key principle in marketing success and the design of the store can be one element used to achieve this. The marketplace has changed and so has its consumers which forces retailers and designers to rethink their marketing and design strategies in the retail industry. Appadurai, (2010) and Mcluhan, (2001) both emphasise the power of the

apparel industry and design of retail sector; that one cannot be isolated from the other but rather supporting of each other in creating successful consumption.

Appadurai, (2010); Van Der Vyver, (2008); Kotler, (2002) and McLuhan, (2001) identify store design as a good communicative marketing tool and differentiation strategy for retailers. Awareness of retail design is thus important and identifying a successful store image is fundamental to building a significant market share in the highly competitive apparel retail environment.

Kotler (2002) defines marketing and elaborates on influences affecting the marketing environment. He points out how globalisation, rapid competition and technology have reshaped markets and businesses. This is relevant to this study as retail interior design makes use of marketing in different ways.

Kotler (2002) states: *"It is no longer enough to satisfy customers, you must delight them."* The relationship and interaction with the consumer have become the key principle in marketing success and the design of the store can be one element used to achieve this. Locally, Van der Vyver (2008) mentions that an integral part of marketing communication is found in store image and its representation. He concludes his study by mentioning that *"A great part of direct communication is in store image; which attracts customers"* (van der Vyver. 2008: 121). Store image can be used to interact and obtain a relationship with the consumer, satisfying the needs of the consumer through design as a marketing strategy.

2.10.2 Displays (Visual Merchandising)

Displays has evolved to visual merchandising, considered to be a visual medium that impacts store design and atmospherics in order to promote the store image (Lee, 2008:11). Visual merchandising encompasses many aspects such as store promotions, signage, floor layout, product mix and interior design aspects which can strongly affect store image (Ha et al., 2007: 478). All these aspects, when well addressed, perform different functions to enhance the consumer experience and ensure good communication of the retailer's store image in an apparel retail outlet (Cant & Hefer, 2013; Li, 2010).

Due to its interchangeable nature, it is no longer only about the display of merchandise but involves how the product itself can be visually communicated to the customer to convey a positive outcome for the brand (Lee, 2008:12). It is a strategic tool in communicating a clear brand image as visual merchandising cues are very visible in

store layout, constantly impacting store design and expectations for customers (Ha et al., 2007: 478).

Visual merchandising helps consumers visualise outfits through mannequin presentations and when browsing in store, consumers appreciate coordinated merchandise according to colour or style. Visual merchandising also shows consumers what retailers have to offer and enables consumers to view as much available stock as possible so that they will be more enticed to buy products when walking through a store (Li, 2010:43; Lee, 2008:32).

The intention of visual merchandising, in store, is to communicate store and merchandise information to the consumer but in order to find merchandise, stores must be easy to navigate through in having clear pathways. Pathway difficulties can not only result from foot traffic density but also merchandise density. Therefore, visual merchandising's relationship with store design is important in creating higher consumer perceptions of a quality brand (Ha et al., 2007: 479).

Locally, Hefer and Cant (2013) discusses visual merchandising extensively to determine techniques and strategies that can be implemented in order to improve visual merchandising within an apparel retail store through analysing consumer behaviour. Substantial aid toward the decision-making process is derived from understanding consumer behaviour (Bhalla, 2010:31). They emphasise the influences of a retail experience; what the consumer perceives and believes and how one can fulfil consumers' needs through visual merchandising and store image.

To suit consumer needs; teamwork is involved in order to design the presentation of a store and its merchandise. It falls within the Visual Merchandiser and Interior Designer's scope of work to design and plan the installation of visual merchandising aspects, such as in store display and interior design. including fixtures, fittings, lighting and signage, and unite them into a successful store design which is usually used for the entire chain of stores (Morgan, 2011:30). The designer assists the visual merchandiser by creating the platform upon which to work. Morgan (2011:30) states: *"Visual merchandisers, architects and interior designers have always worked hand in hand to create retail environments that are inspirational".* The designed presentation of merchandise is now carefully considered and selected for a specific area within a store (Lee, 2008:33).

Morgan (2011) emphasises that stores are under more and more pressure not only to make a sale but to have that consumer return for future purchasing. It is well assumed

that quality products or services have been copied, thus new methods of visual merchandising are to be created to distinguish products or services from the competition to achieve control in the mind of the consumer (Van der Vyver, 2008: 19). Changing merchandising displays regularly allows the store to look fresh and vibrant and advertise new trends whilst keeping the consumer up to date with the latest trends (Hefer, 2006: 77). However, there are budgetary constraints and addressing certain aspects can be costly due to the size of the store. The engagement with displays is much more than just a degree of what consumers see but also supports interaction with the atmosphere of the store (Li, 2010:43). The greater the time spent in-store; so more the exposure to the display increases, creating more opportunity to stimulate unplanned purchases.

2.10.3 Advertising

The brand is expressed through signage which builds on understanding the habits and needs of those in the environment. The design process is driven by key factors of legibility, visibility, positioning and durability. However, legibility is susceptible to colour, light, speed and distance. Although there are no universal codes, it is understood that public areas such as shopping malls develop their own signage codes. These codes include those for materials, illumination (electric), structural choices or land use issues and are influenced by placement and size. The overall architecture and land use of a site should always have complimenting and appropriate signage (Wheeler, 2009:157). Retail advertising has birthed a language unto itself as it is able to accurately convey a store atmosphere, leaving the most enticing one decided upon by the consumer. Advertising can lend itself by logical extension to store identity. Quality, tone and typography can be utilised to convey lavishness of a store. However, one true advertising style, for all stores, does not exist as each store tends to convey distinct images. It is therefore important that signage be consistent in conveying the symbolic character of the store itself (Findlay & Sparks, 2002:107).

In store advertising, displays and signage are merchandising and marketing tools which can be used to maximise sales profits and contribute to a store image (Blattberg et al., 1995:128). Thus, advertising is imperative to a retailer when expressing the character of a store, as much thought would be focused on the factual content of prices, items, timeliness and quality of merchandise on display (Findley & Sparks, 2002: 106). A positive outcome on consumer purchase intent can be a result from a store image that is consistent with the store brand positioning. If promotion is evident in store design

then a pleasant shopping experience can be created as consumers will enjoy being more informed about the merchandise (Grewal et al., 1998:347).

Burke (2002) reported that there was significant interest by consumers to include in store technology applications, such as electronic signs that display promotions, using in store technology devices to order out of stock merchandise, hand held scanners for price displays, report on various colours of product availability, sizes, styles or varieties. The experience of a destination is further enhanced by the support of clever wayfinding systems as well as increasing revenues with effective retail signage (Wheeler, 2009:156).

Signage functions as information, advertising and identification (Wheeler, 2009:156). It is a silent sales tool which consumers can engage with inside and outside a store. Signage is not only a form of promotion but also a 24/7 mass communications medium which attracts new consumers, influences their purchasing decisions and ultimately increases revenue (Wheeler, 2009:157). Overall, signage can provide important information for a consumer about the stores merchandise that can influence their purchase decisions. It is a visual aid providing greater insight into the store products and communicating a store image (Lee, 2008:16).

2.11 Service

2.11.1 Service Quality and Convenience

According to Pettinger (2004: 173), service culture is a mix of 3 customer service components: routine, personal and self-service. Although these are standard services which all stores have to fulfil, the perfect balance between the service types depends on the brand with certain stores emphasising high levels of service as a strategy of competitiveness.

For self-service to work effectively, sales assistants are required to have done considerable prior work such as unpacking, arranging, tidying of clothing rails, that consumers rely on in-store. It has been observed that these preparation services do take a significant amount of time from sales assistants. By cleaning and tidying the store and replenishing floor stock, it also has a dual function in preparing a branded environment (Pettinger, 2004:173). These aspects are specifically controlling the cleanliness of the store interior, accommodating for shopping ease and convenience. For consumers to effectively browse and select products, without interaction with floor staff, the setting out of the branded products aids sales assistance in consumption.

This links to customer selling, searching of garment sizes, trying them on and then purchasing (Pettinger, 2004:173).

In controlling and monitoring consumers to meet sales targets, self-service by consumers become limited. Routine services, comprising of till transactions, monitoring fitting rooms and providing services that keep the store functioning, is seen as "customer service". Routine services also include the controlling, surveillance and monitoring of consumers with respect to crime prevention. The repetition in routine services means there is less creativity from customer to customer or store to store (Pettinger, 2004:174). These aspects are not specific to design variables but it does affect the store experience.

Personal service is seen as a variable of difference between stores as a branding strategy. Furthermore, the difference in work ethics between staff will result in the ability to provide extra services and thus also varying between brands. Personal services which sales assistants offer comprise of stock checking in store rooms, receiving orders, reserving or exchanging or refunding goods including more personal services such as providing advice (Pettinger, 2004:174).

Overall, providing quality service is seen as a basic marketing tool and not a design tool. Many service expectations are thus influenced through design as design contributes in creating a pleasant store environment. Therefore, there are design tools specifically in a retail floor layout, atmospheric cues such as music and informational cues such as advertising and visual appeals which could enhance elements to the store environment. Consumers want to be more informed, therefore a rich set of informational cues gives the consumer more knowledge about the products offered in store. The store experience is measured by the information cues offered, the physical appearance of the store and a functional, well-structured store layout implemented (Grewal et al, 2003: 260).

Siu and Tak-Hing Cheung (2001), conducted a study which demonstrates that future consumer behaviour can be impacted by the quality perceptions of retail service. They were able to obtain insights into how global retailers deliver retail quality services. Of the six researched service dimensions: promises, policy, personal interaction, problem solving and convenience, and physical appearance; the physical appearance and policy had the greatest impact on the overall service quality and on future consumption respectively. The policy dimension involved safety of transactions, accepting most well-known credit cards, free sales transactions and records high quality merchandise,

willingly handling returns and exchanges and convenience of the store operating hours. The physical appearance dimension involved visually appealing physical facilities and service material, modern looking equipment and fixtures and reliability thereof. This dimension is of interest to me for this research as it specific to design.

The higher the interaction between the store and the consumer, the increased likelihood of a consumer viewing the store as the service. The store is made up of many facilities, where all the facilities require to be designed and impact the overall service quality perception.

2.11.2 Technology
2.11.2.1 Web and Mobile based interaction

Dynamics in technological advancements and evolution of consumer behaviour is evolving retail at an accelerated rate (Grewal., et al, 2017; PwC, 2017; Wolf, 2014; Burke, 2002; Kotler, 2002). Shopping at a physical store is no longer the only option as internet shopping has grown immensely popular with consumers (Jocevski et al., 2019; Piotrowicz & Cuthbertson, 2014; Burke, 2002).

Consumers enjoy the convenience of shopping online, having the ability to gain volumes of information, having the ease to compare pricing, and buy unusual items without judgement in store; but this process lacks physical product interaction, service and security (Burke, 2002: 412). The concept of online shopping has changed the way consumers interact with retailers, however, this isn't the only way technologies have been integrated (Jocevski et al., 2019; Piotrowicz & Cuthbertson, 2014; Burke, 2002).

Through digitalization, retailer's customer interfaces are transforming in order to maintain and improve customer interaction (Jocevski et al., 2019: 79). Burke (2002: 411) identifies interactive technologies such as wireless and handheld devices, electronic signage and shelf labels, touchscreen kiosks, body scanning, smart cards, virtual reality displays and even robotics that are often integrated within the store interior.

On the consumer side, there is a growing use of social media as the consumer can use their mobile device to access information to purchase items at their leisure (Jocevski et al., 2019; Piotrowicz & Cuthbertson, 2014). However, the digital platforms are more acknowledged for social communication and interaction across various social media sites (Jocevski et al., 2019: 79).

2.11.2.2 The Omnichannel

Introducing the omnichannel (integration of the physical and digital) is seen as an evolution to multichannel (the ability to interact with consumers on various marketing platforms) as this allows for consumers to navigate freely between pc, mobile and physical stores when concluding a single transaction (Piotrowicz & Cuthbertson, 2014:6).

The integration of the physical store and mobile and web based online stores in order to create omni-channel experience has changed the role of retailers both physically and digitally. However, it is not a simple process to be able to implement omni-channel strategies, as it requires a transformation in a retailer's business model which is seen as a large investment, with great risks (Jocevski et al., 2019: 79). Retailers thus have to adapt to remove any barriers in the channels and provide multiple cross-channel services such as "click & collect", "in-store order, "deliver to home", "virtual showrooms" and other forms of online and traditional retail integration (Jocevski et al., 2019; Piotrowicz & Cuthbertson, 2014).

Jocevski et al. (2019) identifies three main channels through which one can make purchases: the traditional and physical retail store, web-based computer interaction and utilizing a mobile device, such as a downloaded application (Jocevski et al., 2019: 79). The physical store is still utilized within a digital age but through different purchase processes. There is "showrooming", whereby customers visit a physical store to browse and find items they would like to purchase. They engage with the retail store environment but then complete the purchasing process online after leaving the store. "Webrooming" is researching products online but then purchasing the product in the physical store and "click and collect" utilized by customers in order to collect a purchase at a physical store which they have purchased online. These purchasing processes indicates that the physical store is still important to the customer, but changes have occurred in shopping behavior.

2.11.2.3 Omnichannel Benefits

According to Jocevski et al., (2019: 85) this type of shopping behavior cannot be controlled by the retailer. However, achieving this integration in a seamless manner of the omni-channel can be improved by the retailer. Organization and management between the 3 channels of physical, mobile and online can optimize performance, increase customer satisfaction, loyalty and customer experience (Jocevski et al., 2019:

85). Opportunities can also arise from this integration as important information can be gathered through advanced technologies (Jocevski et al., 2019; Burke, 2002).

For both online shopping and in-store shopping, consumers want to be provided with information about the products. Consumers want to speak to someone in person or have a customer service representative whom they could contact via telephone or email (Burke, 2002: 416). These innovations are positive in providing for consumers and engaging with them. Offering technologies within the store provides a balance where shopping technologies can provide volumes of information about products to the consumer. In return, the retailer gains valuable information about their consumers which can be used to further build or refine their brand (Burke, 2002: 412).

Burke (2002) also found that young consumers are showing increasing willingness to engage in new and alternative payment methods, product fulfilment and customer services. This indicates that the integration of in store technologies can contribute to product availability through various channels in order to create a seamless customer experience. Creating a seamless customer experience means that customers should be able to view product availabilities across channels (Jocevski et al., 2019: 85). Discovering new ways to provide comfort continues to be of importance and worthy of investment, as it can aid in consumer decisions, relieve time pressures and increase confidence in retailers. For retailers, it allows for appropriate target market reach at lower costs. Technologies can thus benefit the consumer and retailer to ultimately increase business profitability (Jocevski et al. (2019); Grewal.,et al, (2017) and Burke, 2002).

2.11.2.4 Omnichannel Discourse

Despite all the benefits identified by Jocevski et al. (2019); Grewal.,et al, (2017) and Burke, (2002), Piotrowicz and Cuthbertson (2014) note that retailers perceive channel integration as a challenge due to the lack of consensus regarding digital channel future, lack of united views on consumers across channels, problems with stock management and mobile access. Some consumers who do not use online or mobile advances, could find themselves excluded from special deals or offerings (Piotrowicz & Cuthbertson, 2014:12).

In addition to this, not all consumers desire the same technological interaction. It is especially evident when considering generation differences. Consumers who grew up with endless online access, "digital natives", are a distinct contrast between older

consumers who may prefer traditional personal contact interaction with staff. Hence, the choice of interaction is essential to consumers especially when considering their time. Any in-store technology should be seen as an extension of consumer services rather than a barrier for those less technology inclined. To resolve an issue of such diversity, it would require a combination of available in-store options such as: sales assistants, digital seamless touchpoints and options to inspect and try physical products. Piotrowicz and Cuthbertson (2004: 11) acknowledges that even though there is a demand for improved consumer experiences, it is reliant on product, brand positioning and store strategy. Thus, the scope for differentiation will always exist between retailers.

Consumers are however willing to move between channels, should their expectations of consistency, uniformity and integrated services be met; even though it would still depend on their preferences or product category. Unfortunately, retailers often are not able to deliver on those experiences. Although a retailer may offer omni-channel access, there is still a "silo" mentality where online or traditional channels are treated separately and often handled by different departments that do not cooperate (Piotrowicz & Cuthbertson, 2014: 8). This is especially noticed for the online channel where IT staff do not have the interaction which in-store floor staff do. There is a lack of price, marketing, promotion, supply chain management, brand building and experience integration across all channels (Piotrowicz & Cuthbertson, 2014: 9).

Consumers will continue to seek the same thing whether they shop online or in store; convenience, accurate information with pricing information, and security when making a purchase, fast checkout, competitive prices and accessible customer service. An online service only varies in that it should provide reliable delivery and, in a retail store, the design of facilities should be clean and attractive (Burke, 2002: 427).

Overall, a consumer's retail experience is not entirely made up of technology. When consumers are asked to describe their shopping experience; technology is rarely mentioned even though it could play a key role in enhancing a shopping experience. Burkes (2002) study points out that a significant percentage of consumers were keen about testing the technologies of at least one in-store application. Piotrowicz and Cuthbertson (2004:11) interviewed retailers that mentioned that technology should take the back seat and that people, merchandise and the feel of store atmosphere should be the primary focuses. Furthermore, concerns regarding the technology costs were expressed when comparing its upfront investment in relation to an improved consumer experience and impact on sales. It is also clear from the study conducted by Jocevski

et al. (2019: 85) that globally the fashion and apparel industry is not as advanced in these channel integrations, consumer electronics and bookstore and media categories have been more involved in channel integrations. Despite retailers utilizing different omni-channel strategies, they all have one common goal and that is to satisfy the customer's needs, this is the basis for all retailers (Jocevski et al., 2019; Piotrowicz & Cuthbertson, 2014; Burke, 2002).

This identifies that although there is need for crossover of channels, consumers and retailers still prefer seeing, feeling, touching and trying on the products, coupled with the experience of the store atmosphere feeling. The traditional store could then convert to a "hub", as a focal point, for sales channels integration and then use the store as an avenue to attract consumer to provide additional consumer experience, regardless of the channel used. Product characteristics, and level of consumer experiences provided, affect the attraction of consumers to the store and should match the consumer requirements. These requirements rely on the level of interaction with previous personal experiences and the products (Piotrowicz & Cuthbertson, 2014: 10).

An extra dimension is created when increasing the role of technologies in-store. This includes consumer technologies such as augmented reality, magic mirrors, interactive screens and those for staff such as tablets. Customer experience should allow for full interaction of all these technologies. One of the challenges of introducing new in-store technologies is a possible redesign requirement to store optimization. However, store layout is more focused on the arrangement of merchandise, visibility and flow rather than consumer experiences. Inclusion of technology is not as arduous in the case of simple solutions, which mostly pertain to operational movement such as checkouts at self-services points. Subsequently, the location of new and more complex devices within the store, such as digital signage or interactive walls, requires further investigation for full and purposeful integration in the store layout (Piotrowicz & Cuthbertson, 2014: 10). Overall, through adoption of these new technologies, consumers are affected by a number of factors that can influence their purchasing decisions through their retail experience. These factors should be considered for future developments within the retail market.

2.11.2.5 Omnichannel Transition

Jocevski et al., (2019: 88) highlights 3 dimensions that can enable a transition to omni channel retailing, namely: a seamless customer experience, develop integrated data analytic systems and an effective supply chain and logistics. One of the technological

aspects that should be considered for a seamless customer experience is focusing on a mobile experience, enabling product scanning in the physical store to find out more information about products, membership schemes and new payment options via a mobile device. These dimensions could be of importance to the South African retail industry through implementation of these technological strategies.

From a global perspective, these technological developments already exist but from a local standpoint, research is limited to understand to what extent technology has influenced the South African retail industry. In South Africa, there are still many that are not part of the digital world of imagery or connected via computers or internet. Not everyone can use them and not everyone wants to use them. Computers are seen as a luxury where mostly people who can afford them utilise them or have access to their facilities. Therefore, there is some doubt as to the effect the new technologies will have on all types of retailing and shoppers in the same way.

2.12   Conclusion

Store Image can become very useful to the retail industry in improving design of South African Retail brand stores. Design is communicated through one's senses whilst still addressing consumers' needs and wants. Visual merchandising is also incorporated in store image. It plays a role in how a consumer experiences a space and how they engage with the merchandise through design. However, it can only become established once design is fully recognised as a great measure of importance to the South African apparel retail industry. Only then can it be considered a developmental success in the implementation of store image design.

Globally, both Appadurai (2010) and McLuhan (1994) identify design and the apparel industry as good communicative marketing mediums. Retail store design has become a method of marketing communication and can be used as a differentiation strategy by retailers. Potential increase in sales can be a result of an appropriate store image within the South African apparel retail sector. Thus, in the highly competitive apparel retail environment, the awareness of retail design is important and identifying successful store image attributes are essential to building a substantial market share (Van der Vyver, 2008: 121).

It is clear that many global factors have influenced retail design. These global factors have caused competition between various local and global brand stores, resulting in economic downfalls in the retail market. Both the Design Skills Framework of 2014 and

The Department of Economic Development and Tourism (DEDAT) have identified design as one of the key economic drivers to improve quality of life, enhance competitiveness and support economic growth through innovation in South Africa (Design Skills Framework, 2014: 4). In South Africa, as well as the entire continent; DEDAT is the first provincial government department aimed at embedding design in to the economy, through a collaborative writing on design strategy, as a tool to drive competitiveness and unlock innovation (Cape Craft & Design Institute, 2012:4).

In today's post-modern society, retailers continue to try and keep up with the constant changes in technological advancements and marketing strategies. With this research, I propose to explain how globalisation influences store image in South African apparel retail design.

3. CHAPTER THREE: METHODOLOGY

3.1 Introduction

This chapter described the research method used for this study, and how it has guided data collection, analysis and presentation of the findings. The aim of this study was to interpret how globalisation influenced store image in South African apparel retail design. The store image of local and global apparel retail outlets was compared using three sets of findings. The first was an analysis of observational data by the researcher, the second findings from data available in the public domain, and, thirdly, findings from focus group observations and discussion with selected interior design specialists. The discussion with interior design specialists focussed on gathering their views about how globalisation influenced store image in South African apparel retail design. To achieve this, I used a case study research strategy (Farquhar, 2012; Olsen, 2012; Mills et al., 2010; Saldana, 2009).

3.2 Qualitative Study
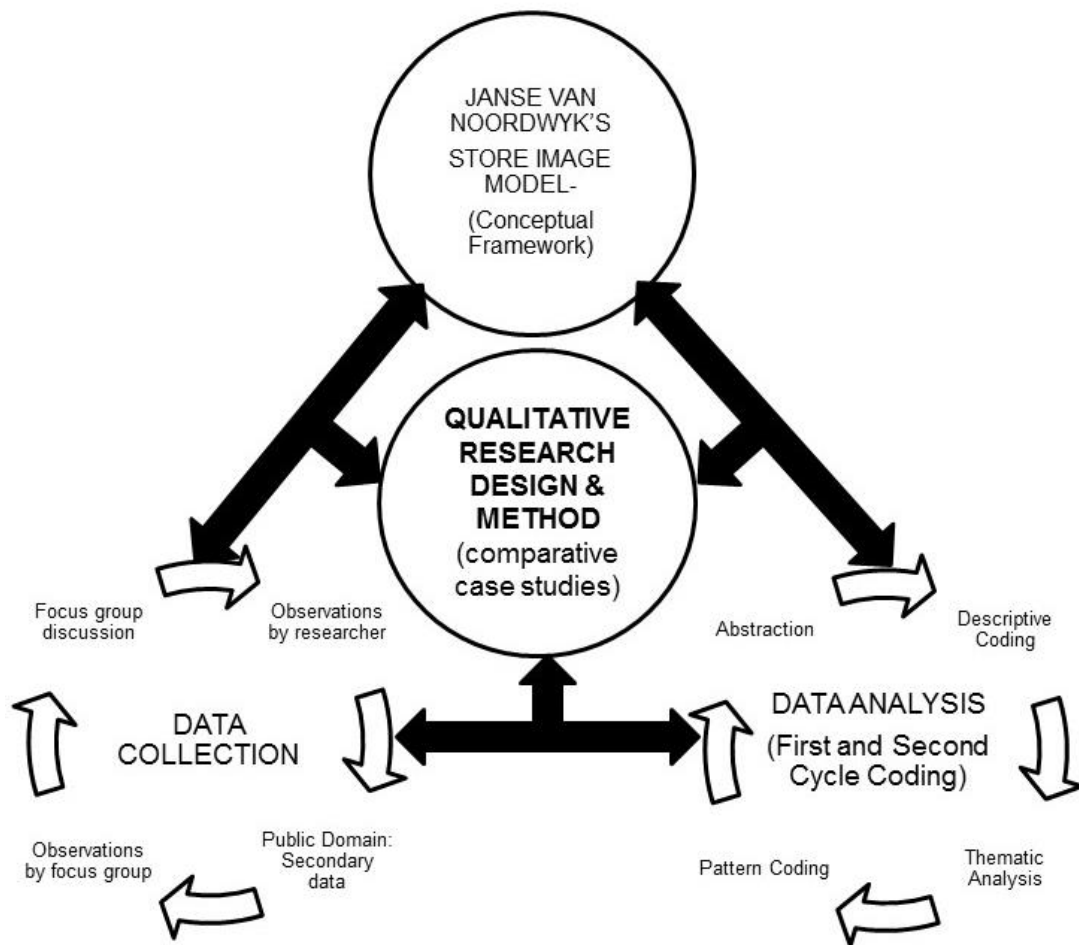
Figure 3.1: Qualitative Research Design & Method

The diagram above presents the qualitative research design process utilised for this study. It identified qualitative research as subjective, in which meaningful social actions were often attached to, or influenced by, people.

A qualitative interpretive research approach was adopted for this study. Interpretation of observed material needed to be conducted continuously to enhance the validity of the research (Alvesson, 2011: 4). Therefore, it occurred during different stages of the research process.

Interpretive research often involved utilising participant observation and field research which played a significant role in this study in the data collection process. *"Interpretivists emphasize that there are no facts, only interpretations which depend on meanings ascribed by the interpreter"* (Alvesson, 2011: 2).

This was an empirical study solely focused on, and communicated through, qualitative data. Qualitative-research methods were comprised of individual observations, group observations, and descriptions that allowed the researcher to identify with the phenomenon and understand it in a fair, comprehensive way (Gill & Seamon, 2013:14).

According to Lewis and Ritchie (2003: 2-3):

> *Qualitative research locates the observer in a world of retail through practices such as design to make the world more visible. This activity can be observed and analysed through methods of interviews, photographs, conversation, recordings and notes. Studying and interpreting the outcomes and formulating findings into theory instead of statistics*

To meet the aims and objectives of this research, iterative comparison was used throughout the study, to evaluate similarities, differences, and associations between entities, with the underlying goal to obtain variations (Given, 2008:100). Qualitative research began in the field in order to observe, record and analyse data (Schutt, 2011: 325). Through this process of discovery, important categories, patterns and relationships were identified in the data. A fair comparison has been made where the data gathered provides a wide range of contrasts as well as commonalities (Olsen, 2012:187).

3.3   Case Study Research Strategy

Case study research involved observation; therefore, one usually posed a "how" or "why" question. Through observation one was able to map out experience in reality. Data collected through this experiential method dealt with underlying concepts. A conceptual framework guided the empirical data collection process. The empirical evidence collected needed to be considered with reference to the conceptual framework (Farquhar, 2012: 37).

The conceptual framework was typically extracted or constructed by means of the literature. Concepts included should relate to the research question (Farquhar, 2012: 38). It was not required at Master's level to utilise a conceptual framework diagram that was completely original. It was suitable to adapt an existing model to convey the core research question (Farquhar, 2012: 41). Therefore, this study utilised Janse van Noordwyk's store image model (2008). This conceptual framework explained the focus of the research and guided the creation of the research strategy.

Adopting a case study research strategy was particularly relevant and suited to this study, as it aimed to investigate a complex research question. It was possible to study the research questions within context, but the context could not be controlled. Case studies were more flexible; therefore, the research approach had to be adapted and respond to changes that may have occurred. Through this, an in-depth investigation unfolded to generate greater insight into answering my research question (Farquhar, 2012: 41). It was appropriate to explore, explain, understand and describe the research question or problem in case study research (Farquhar, 2012: 42).

3.4   Multiple Case Studies

Several selected cases that were extensively studied, are known as a multiple case design or collective case design. Having selected more than one case for this study helped develop a more comprehensive understanding of the research problem. Multiple forms of data collection were utilised to gather information systematically for each case (Mills et al., 2010: 2). The data collection methods included participant observations, individual observations, focus group discussions and a review of associated literature; when analysed provided rich, in-depth and detailed information (Mills et al., 2010: 2).

Four examples were chosen (Table 3.1) to explore similarities and differences (Mills et al., 2010: 2). Each individual case was affected by different environments or conditions, which were considered. Results were more powerful across a varied range of circumstances that demonstrated the issues across various cases rather than just a single case. The selection of cases was largely directed by the conceptual framework (Farquhar, 2012: 44).

3.5   Comparative Structure and Unit of Observation

A comparative research traditionally involved more than one case at several levels, such as the number of countries, cities or different types of people. This study focused within a South African context, by choosing to analyse local and global brand stores, represented locally as units of observation, within the presented multiple-case study. In this, my study was strategically placed within a narrow scope to result in more refined outcomes (Olsen, 2012:188). Research was carried out by the observation and analysis of two local and two global brands both represented locally. Two malls were chosen, as they were situated in high trafficked business areas within their geographic regions of Cape Town; the V&A Waterfront, situated within the Cape Town district, and Canal Walk in the Northern Suburbs.

The research was focused on middle and high LSM bracket stores. It did not focus on low LSM bracket stores as they tended to not be designed and therefore did not fall into the scope of this research. These stores were categorized in the lowest LSM brackets of 1 and 5.

Store A and Store B (Table 3.1) have been chosen as the global brands represented locally in South Africa. Store A represented a high-income luxury brand due its mark within the LSM bracket of 8 and 10, and was situated in V&A Waterfront, Cape Town. Store B represented a middle income brand due to its mark within the LSM bracket of 6 and 8. Store A was compared to the high-income local brand Store C situated in Canal Walk. Store B was compared to the middle-income local brand Store D, both situated in V&A Waterfront. Stores were selected as examples of South African brands versus global brands to determine how globalisation influenced store image in apparel retail design in South Africa.

Table 3.1: Sample Summary

Selected stores	Global or Local Brand	LSM category
Store A	Global Brand	High LSM
Store B	Global Brand	Middle LSM
Store C	Local Brand	High LSM
Store D	Local brand	Middle LSM

A comparative structure was selected as comparison was a key aspect within case studies. A comparative structure allowed that different types of qualitative research methods could be used to cover a variety of topics and disciplines through comparisons (Given, 2008: 6). Comparative research involved picking a set of cases that could be examined to find both similarities and differences between social entities (Given, 2008: 2).

3.6   The Role of the Researcher

As an observer in the field involved in the data collection process, data was filtered through my eyes as a data collector and therefore considered to be subjective, intuitive and value laden (Goulding (ed.), 2002: 18). However, my training as an Interior Designer has assisted in avoiding excessive subjectivity. This study only focused on design-based research and as an Interior Designer was skilled to analyse every aspect of a space, to constantly look at a space from all angles and systematically record to avoid bias. This study also made use of external participants such as Interior Designers, involved in retail design and interior design academic lecturers, to triangulate information and avoid excess subjectivity. Data was checked indirectly through the use of similar, or related secondary, data which enabled me to provide a comparative picture (Goulding (ed.), 2002: 18).

3.7   The Store Image Model: A Conceptual Framework

An existing store image model developed by Janse van Noordwyk (2008) was adapted to convey the core research question of this study. The existing model included eight store image attributes with their sub-categories, namely: atmosphere (store interior, store atmosphere), convenience (transportation, location, parking, shopping ease, store hours.), facilities (store layout, store appearance, convenience of facilities, fitting rooms, fixtures), institutional (clientele, store reputation), merchandise (assortment, style, price, quality), promotion (advertising, displays, sales incentives), sales personnel (interaction, appearance) and service (after sales service, payment options, in store service, delivery options) (van Noordwyk, 2008).
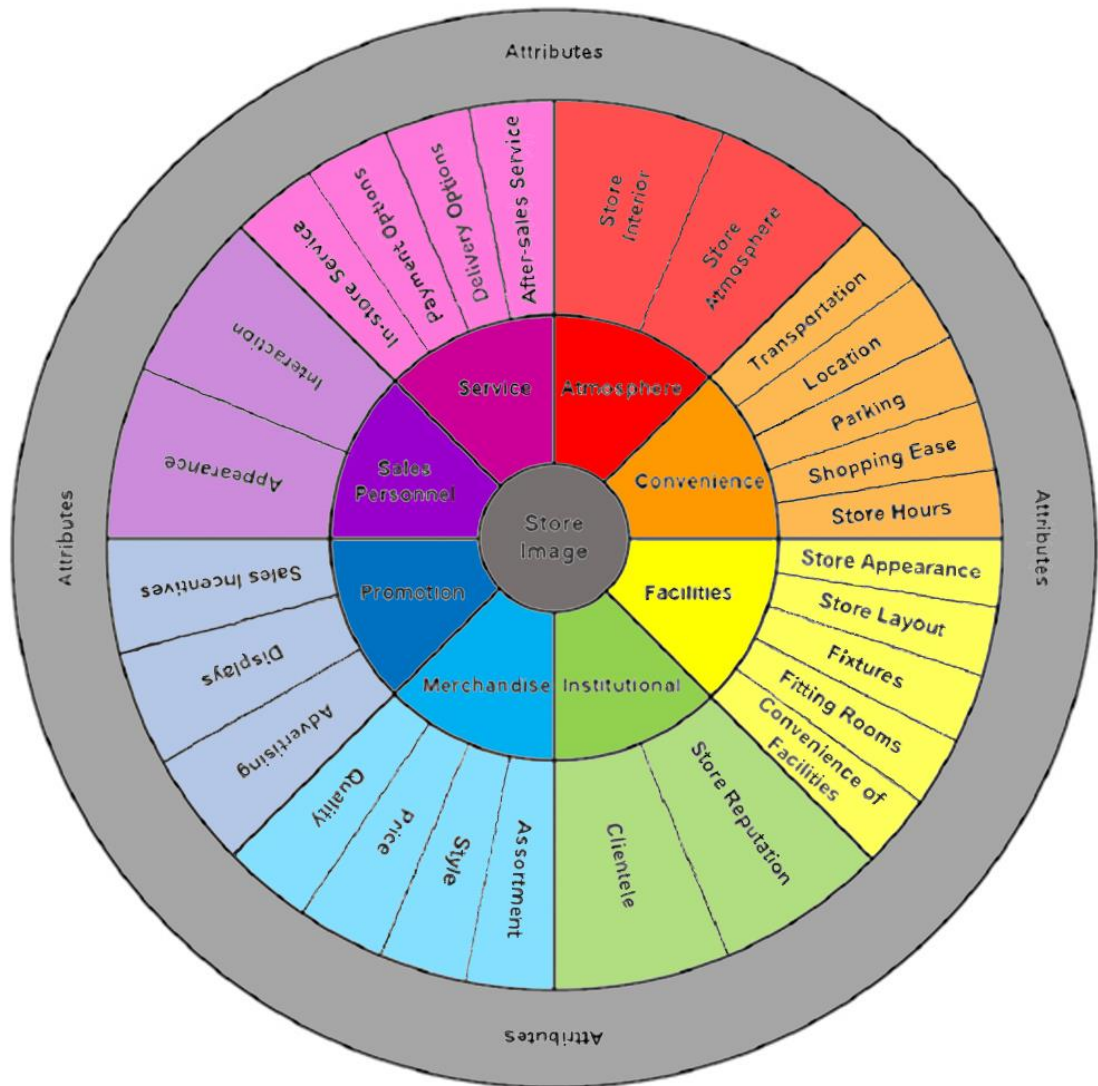
Figure 3.2: Janse van Noordwyk's Store Image Model (colour added by researcher)

(van Noordwyk, 2008)

Individual observational analysis and comparison were completed based on van Noordwyk's store image attributes identified (Figure 3.1). Collection and interpretation of data took place where early concepts were derived through van Noordwyk's Store Image Model (2008). Through observation it was noted that although relevant, the conceptual framework could not be applied without analysis and development as the model only provided early concepts that required refinement to relate to the purpose of the study.

Individual observations of each store were analysed according to the concepts identified in the model. Key concepts were derived from the data obtained during field observations. The field observations revealed the concepts that were purely associated

with design, and therefore aligned to the purpose of the study. Only 7 existing store image attributes remained and many of their sub-categories required refinement, the data also revealed additional store image attributes.

Figure 3.3: Adapted store image model as a conceptual framework

The adapted store image model (Figure 3.3) includes only seven store image attributes which were further refined to exclude any subcategories of these attributes that did not relate to design. The following attributes remained: atmosphere (store interior, store atmosphere), convenience (shopping ease, convenience of facilities), facilities (store layout, store appearance, fitting rooms, fixtures), store reputation (store identity, brand identity), merchandise (style, quality), promotion (advertising, displays), and service (payments and services, technology)

Transportation, parking and store hours were removed as they were dictated by the mall and the surrounding area. Subcategories of convenience changed to include

convenience of facilities, which looked at the convenience of the fitting rooms, rest areas and point of sales. Clientele was not included in this research as this related to business and not design. Store reputation became the main focus as it linked to store and brand identity. Assortment and price were removed as a subcategory as only style and quality were noted as a link between design and store identity. Assortment varied for all stores and price only related to the store LSM. The promotion attribute was renamed to marketing as advertising and displays were recognised as marketing tools within the interior design. Promotion was a sales tool and marketing a communication tool. Sale incentives were removed from marketing as it was not directly related to design, only to promotional value. Sales personnel was removed as a store image attribute as this related to employees and not store design. The interaction with the sales personnel links to the atmosphere experienced in store and therefore was excluded as a category on its own in relation to the store image. After sales service was removed as this involved interaction with sales personnel and not design. After sales service was possible via a telephone call or email, which was online contact rather than in store design. Payment options and in-store service were retained and amalgamated into one as they were linked to in-store service by the point of sales which was designed. Delivery options were removed as this was only via online purchases, not in-store collections. A new subcategory: technology, was added as in-store technological advancements were noted in store as part of the design.

Concepts were arranged by placing them into suitable categories e.g. Atmosphere: store interior and store atmosphere. Each individual concept was analysed further through comparison of each store. Middle LSM bracket stores were compared and High LSM bracket stores were compared to reflect and reveal commonalities of the concepts observed. How often these concepts were utilised, how each design attribute was presented and whether it could be deemed significant to the aim and objective of the study was identified.

3.8   Data Collection

Data collection phases for this study consisted of direct observations, publicly available data and imagery, focus group observations and discussion. This study focused on a South African context, through the analysis of local and global brand stores represented locally. Two malls were chosen as they were situated in high trafficked business areas in Cape Town. In this way the study was strategically placed within a narrow scope to result in more refined outcomes (Olsen, 2012:188).

3.8.1 Observations by researcher

Table 3.2: Observational data collection process by researcher

Date	Description	Type of data collected
04.10.2015	Observations at Canal Walk Mall, Store D and Store B Middle LSM Stores	Digital Memos
11.10.2015	Observations at Canal Walk Mall, Store C High LSM Store	Digital Memos
20.10.2015	Observations at V&A Waterfront Mall, Store B and Store D Middle LSM stores and Store A High LSM store	Digital Memos
23.11.2015	Comparing digital memos for each store	Table
29.01.2016	Comparing digital memos/note taking for each store according to LSM brackets and categories in Janse Van Noordwyk's store image model.	Table
10.02.2018	All 4 stores were revisited to obtain more data	Digital Memos

Creating field notes and memos were processes that started at the beginning when observational data was collected. I was able to collect data on written memos directly after observing each store at the various malls. Memos were titled and captured digitally (Table 3.2) according to categories and concepts to theoretically underpin the data throughout the sampling and data collection stages. The data gathered was categorised according to attributes identified in Janse van Noordwyk's model and organised using a table. Through this process, data was continuously analysed to identify categories and their properties.

3.8.2 Image Analysis: Exploring space through imagery

Images in the public domain allowed for comparison and photographic analysis.[1] Using images which were publicly available online and instore observations in the form of memos and note taking, opened up research to new conceptual interpretations (Goulding (ed.), 2002:57).

Photographs of the chosen global and local brand stores were derived from publicly available data such as websites, articles and books. These photographs gave insight into implementations of the store image model developed by Janse van Noordwyk (2008). A photographic analysis and an observational analysis took place in a tabular

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[1] No outlet would give formal consent to having photographs taken in the store due to security concerns. Therefore, images in the public domain were used

format. The approach to analysing images relies on the coding, identifying features of the image content eg. Brick walls assigned to a code. Various elements within each image was identified and labelled on each chosen image derived from the public domain. *"The significance of the findings is only as strong as the precision of the research questions asked"* (Banks, 2014: 399).

Table 3.3: Example of Photographical analysis

JANSE VAN NOORDWYK STORE IMAGE DESIGN ATTRIBUTES	CODES	MIDDLE LSM STORE B	MIDDLE LSM STORE D	HIGH LSM STORE A	HIGH LSM STORE C
1. Atmosphere	**Store Interior**	**CLEANLINESS SPATIAL QUALITY AESTHETICS THE STRUCTURE WALLS FLOOR CEILING LIGHTING**	**[Figure 4.2]** **SPATIAL QUALITY:** Indicates that Store B is larger in size than Store D **[Figure 4.11] Body section** **STORE ATMOSPHERE(SEE) & STORE IDENTITY:** Very feminine and bright through the use of white, light timbers and feminine pinks **STORE ATMOSPHERE(SEE):**The in store colour changes from the usual brand colour of red to pink in the 'body' section **VARIED CEILINGS:** White painted Timber panelled ceilings Female shoe area: white plastered ceilings **VARIED FLOORING:** Timber flooring in body section and tiled flooring in female shoes section. **AESTHETIC & DISPLAYS:** Types of displays changes (freestanding, hanging displays and table displays at various heights) **[Figure 4.14]** **CEILINGS:** Plastered ceilings & Herringbone timber ceilings **GRAPHICS:** Large LCD screen behind point of sales **STRUCTURE:** Raw exposed structural columns **POS:** Bold, red, long, rectangular point of sales **FLOOR:** Grey tiled flooring	**[Figure 4.1]** **SPATIAL QUALITY & CLEANLINESS:** Store overfilled with apparel, difficult to see past all the apparel. **FLOOR:** Tiled flooring in female merchandise section. **GRAPHICS & WALLS:** Graphics displayed on timber wall slatted divider screen Same type of display system, using grid like structure in both male and female section **GRAPHICS & WALLS:** Projector displaying graphics onto wall above normal eye level **WALLS:** Walls are lined with merchandise/apparel. **CEILING & LIGHTING:** Combo of 600x 600 standard ceiling tiles in grey and white finish **DISPLAYS:** White powder coated steel for displays **[Figure 4.2]** **SPATIAL QUALITY:** Indicates that Store D is smaller in size than Store B **[Figure 4.9]** **STRUCTURE/AESTHE TIC & STORE IDENTITY:** White columns with black and red lower case lettering **STORE IDENTITY & SIGNAGE/GRAPHICS:** Quotes are quirky and fun and add to the stores aesthetic/store image.	**[Figure 4.3]** **SPATIAL QUALITY:** Large store area within the V&A Waterfront mall, surrounded by many smaller stores also within a high LSM bracket. **STORE FRONT:** Wide angled entrance into the store **[Figure 4.6]Store A by Elsa Urquijo Architects, Hong Kong.** **LIGHTING:** Same lighting as Store A in SA-Strips of light integrated in bulkhead **AESTHETICS & DISPLAYS:** Same type of side handing display designs as used in Store A in SA. **AESTHETICS & DISPLAYS:** Same type of table display stands for folded garments as used in SA **CEILING:** Same ceiling in SA-white lowered bulkhead over entire store. **AESTHETICS & STORE IDENTITY:** Same minimalist approach-consistency in design and store image. **FLOOR:** Tiled flooring throughout-same finish in Store A in SA. **AESTHETICS & STORE ATMOSPHERE(S EE):** Same colour scheme and material usage in the space as in SA store.	**[Figure 4.4]** **SPATIAL QUALITY:** Canal Walk Upper level floor layout indicating spatial quality of Store C in Canal Walk Mall to be smaller than Store A. **[Figure 4.5]** **WALLS & FITTING ROOM:** Walls in fitting room filled with framed decal images and a bone chandelier. **WALLS & DISPLAYS:** Bespoke visual merchandise displays are constructed using dark timber **WALLS & STORE IDENTITY:** Animal head on wall-Nguni Logo-Presence of Africa. **LIGHTING:** Using chandeliers as large feature lighting throughout store. Lighting integrated in bespoke built in display units. **DISPLAYS:** Half Torso mannequins used to display apparel on timber tables. **[Figure 4.12]** **FLOORING:** Animal skin rugs Screed Flooring Sisal Carpets

3.8.3 Interior Design Specialist: Observations and Focus Group Discussion

The sampling for the data collection process incorporated a focus group to strengthen the findings. Five Interior design specialists who were ready, willing and able to participate in this study were approached for store observations and a focus group discussion. This type of selection process was a sample of convenience, as many contributors in the apparel retail design industry were not readily accessible and willing to participate (Given, 2008:124).

They were able to reflect on their own experiences through observations. A discussion about their observations was held in order to gain experiential descriptions. All transcripts in the form of observational guides completed and focus group discussion data were examined during data analysis. More than one method of data collection (Table 3.3) was implemented for the focus group to yield more accurate and complete answers (Czaja & Blair (ed.), 2005:34).

Table 3.4: Focus Group Data Collection Process

Date	Description	Type of data collected
29.06.2016	Development of Observational Guide and Questions for focus group discussion	Refined Themes and Questions
19.07.2016	Breaking down questions into design related categories according to Janse Van Noordwyk's model	Refined Themes and Questions
08.02.2017-06.05.2017	Observations by participants	Observational Guide
26.04.2017	Pilot study	Refined Questions
07.05.2017	Focus group discussions of observations	Refined Themes and concepts identified through questions answered.

Focus group participants were required to go out into the retail industry and visit 4 stores represented in 2 malls. Each participant was given an observational guide consisting of design attributes and key word descriptors to utilise during their visits to the stores mentioned.

The adapted store image model was used to create an observational guide for focus group members to utilise during their field research process. The observational guide (Table 3.4) created clear, structured guidelines through key descriptors and design related attributes for each participant to utilise during their field research process. Once their field research was completed, a discussion date was agreed upon to further probe the field research undertaken through a focus group discussion. "How" and "why" questions were posed to initiate discussion between the participants during the focus group discussion in order to interpret information which was a key part of the iterative process of qualitative research, clearly identified by Burrell & Morgan (1979). Each focus group participant answered questions (Table 3.5) that were formulated to directly relate to the design attributes in the observational guide. This meant that the focus group participants could refer to notes made during their store visits to give experiential descriptive responses to the questions posed.

Table 3.5: Example of Observational Guide

<table>
<tr><td colspan="4">THE FOLLOWING DESIGN ATTRIBUTES AND KEY WORD DESCRIPTORS ARE GIVEN BELOW AS A GUIDE TO UTILIZE WHEN VISITING AND OBSERVING THE 4 APPAREL RETAIL STORES REPRESENTED IN CANAL WALK MALL & V&A WATERFRONT MALL IN CAPE TOWN</td></tr>
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Table 3.6: Example of Focus Group Questions for the Focus Group Discussion

QUESTION 9					
As a shopper who visited each store can you describe the stores identity?					
Store image design attributes	**Key attributes**	**Store D at V&A Waterfront Mall (Middle LSM store)**	**Store B at V&A Waterfront Mall (Middle LSM store)**	**Store A at V&A Waterfront Mall (High LSM store)**	**Store C at Canal Walk Mall (High LSM store)**
4. Store Reputation / Identity	STORE IDENTITY				
QUESTION 10					
Describe the merchandise style and explain in your opinion whether or not it has a linkage to the store identity.					
5. Merchandise / style	MERCHANDISE STYLE in relation to STORE IDENTITY				
QUESTION 11					
Elaborate on your perception/view of the quality of the merchandise in relation to the store image					
quality	DEPENDABLE MERCHANDISE:				
	GOOD QUALITY MERCHANDISE:				
	STORE QUALITY:				

The questions were designed to determine how globalisation influenced store image in South African apparel retail design. Therefore, each question developed related to a design attribute pertaining to store image in the apparel retail stores chosen. These questions were tested in a pilot study on a convenience sample prior to their implementation in the study to identify errors and misleading or difficult instructions and to assess overall clarity. Pilot study participants did not participate in the final study. The questions were modified, where necessary, before the final focus group discussion commenced.

The combination of the notes made under each attribute heading, and key descriptors to assist, made the questions manageable and thus allowing the answers given to be clearly structured and answered easily and directly. All data discussed during the focus group discussion was recorded via a voice recorder as well as written notes made during the discussion. The data derived was then captured in a table. Both the individual observations and focus group participant data were now obtained and tabulated, allowing for further comparisons to be achieved.

3.9   Ethics and Informed Consent

The qualitative research involved in this study required working with Interior Design specialists and using methods such as focus group discussions, on-site observations, and written communications. It was essential that the researcher gained access to the intended participants through the appropriate ethical and academic practices, for the sole purpose of conducting formal research (Given, 2008: 2).

The following ethical and academic practices were utilised:
•   Ethical clearance was obtained as per CPUT policy.
•   As publicly available data was used there were no ethical concerns
•   Individual consent forms were included as adequate safeguards to minimise risks for focus group discussions.

According to Lewis and Ritchie (2003: 76):

> *Informed consent is a critical concept in ethical considerations. It involves ensuring that potential participants have a clear understanding of the purpose of the study, the funder, the organisation or individuals conducting it, how the data will be used, and what participation will mean for them.*

The consent forms were required as it was the first and most direct line of access to participants for this study. It was used to formally request their involvement in the study (Given, 2008: 2). The consent form also ensured protection by offering confidentiality and privacy of all parties involved. Refer to attached consent form in Appendices: Addendum B

By following these formal procedures access to the participants was ethically sound and written consent and ethical clearance protected their psychological, physical, and/or professional welfare. This allowed me to confidently continue my study in assurance that my research was conducted in an ethical manner (Given, 2008: 2).

3.10 Data Analysis and Triangulation

Comparison allowed researchers to compare at a "higher level" of abstraction (Given, 2008: 2). Coding was useful in the comparative analysis because it helped to draw data together under themes, for internal and external comparison (Thorpe and Holt, 2008: 4). Data analysis required incisive observation by myself and participants, and structured probing questions for a focus group discussion. The analytical process involved coding strategies, where findings from observations, focus group discussion recordings and image analysis were processed into distinct meaningful units to generate concepts (Goulding (ed.), 2002:75). Concepts for comparison emerged inductively, which were then placed within descriptive categories. Further interpretation of the data was then required, to re-evaluated the data to form higher order categories until all data became saturated (Goulding (ed.), 2002:75). Only the most significant data that related to the aim and objectives of this study was kept and utilised to answer how globalisation has influenced store image in South African apparel retail design.

Two types of data coding were completed as part of the data analysis, namely: First Cycle and Second Cycle coding (Saldana, 2009), which were made up of detailed phases which refined data to a point of saturation. Through these phases relations started to emerge which were relevant to the study. These relationships demonstrated particular patterns in data which could be easily categorised (Holstein & Gubrium, 2003: 2). The saturation process occurred through the sorting of the data into various categories.

In order to ensure validity, case study research should be reliable (Mills et al., 2010: 4). Triangulation was used to address reliability concerns in research. Triangulation was achieved through the use of multiple data sources that ensured different outcomes and

perspectives which was supported through the different data sources (Gill & Seamon, 2013; Olsen, 2012; Mills et al., 2010). I was able to identify a number of contrasting views and experiences in order to gather a broader scope of information around the given research challenge (Gill & Seamon, 2013:13). Capturing different data sources that mentioned the same thing provided research credibility (Farquhar, 2012: 48). Stability was addressed through the documentation of the research strategy. If the research process could be reproduced from data collection to conclusion, then it affirmed that the research was obtained through the solidity of the research process (Mills et al., 2010: 6).

3.10.1 First Cycle Coding: Elemental coding method

Coding summarized or condensed qualitative data, it did not reduce it or analyse it. Specific types of codes were first derived through an initial phase of coding. Several of the same codes were then used repeatedly in completed data sets to find repetitive patterns and consistencies documented in the data. A pattern could be characterised by similarity, difference, frequency, sequence, correspondence and connection. Codifying was a process that allowed data to be systematically ordered, grouped, regrouped, relinked or segregated to merge meaning and explanation. When the major categories, found through coding, were compared with each other and combined in various ways, the interrelated themes and concepts lead towards the development of theory (Saldaña, 2009; Blaxter et al., 2010).

During the coding process, the findings gathered during individual and participants' observations, focus group discussion recordings, memos, and image analysis were reviewed. This involved line-by-line coding, which informed emerging concepts. A constant comparison of codes (to one another and to emerging concepts) took place (Goulding (ed.), 2002:77). The following elemental coding methods formed part of the First Cycle coding for this study: Descriptive Coding and Thematic analysis (themeing the data).

Descriptive Coding was the primary coding method of my study as it was ideal for multiple types of data. Descriptive coding involved summarising a primary topic of a passage of text into a one-word code or short phrase (Saldaña, 2009:3). Descriptive codes could also be assigned sub-codes which explained the general code in more detail (Saldaña, 2009:72). By utilising descriptive coding, it was quite important in discovering insights or making connections about participant observations and the issue under investigation (Saldaña, 2009:51). It was essential for assessing participant

change, which was an important part of this research; the descriptive coding was categorised and recorded in tabular format (Saldaña, 2009:72).

The store image attributes identified in Janse van Noordwyk's model (2008), included sub-categories which were key in the descriptive coding process. Categories and sub categories were created from the interpreted data, only meaningful codes were kept and utilised to aid the purpose of this study. The data was categorised into contributing characteristics that only pertained to store image design attributes. The new concepts that emerged were added as new additions to the store image model, and concepts that were noted due to its irrelevance to design, were removed from the store image model.

Table 3.7: Example of Table used for analysis of personal observations & public domain data coded data.

Codes	Store A at V&A Waterfront Mall	Store C at Canal Walk Mall	Data available on Public Domain	Summary of Commonalities and Differences (Findings)	Store A Global Brand situated in V&A Waterfront (Key words)	Store C Local Brand situated in V&A Waterfront (Key words)
CLEANLINESS: (Store Interior)	All White with hints of black and mirror/reflective finishes Clinical, uncluttered, well-structured	Clean, well kept Dark finishes, woods and concrete	No Public Domain data with regards to cleanliness	Commonality: Clean Difference: Different finishes and feel	Clinical, well structured, uncluttered	Clean, well kept
SPATIAL QUALITY: (Store Interior)	Larger than Store C easy to spot large bright entrance	easy to navigate around small store smaller entrance allows for spacious facilities. Well-structured and organised well-designed fitting rooms	The size of the store A is approximately 1400 square meters (Grazia South Africa, 2012).	Difference: Store A is larger than Store C Store A can accommodate for a larger variety of merchandise due to the size of the store Store C utilises its space allowance well in its store design and layout. Store A has a smaller entrance to the store, can be easily passed by. Therefore, they use scents and sound to draw customers inside.	Large store, structured and very spacious	Small Store spacious facilities, using senses to attract customers

In thematic analysis, a theme could be a phrase or a sentence that identified a unit of data and how it pertained to the study. A theme could be termed a category, domain, phrase or unit of analysis; it brought meaning and identity to experiences. Categorising a set of data into a topic that organised a group of repeating ideas. The analytic goal was to narrow down on a number of themes and develop an overarching theme. Thematic analysis allowed categories to emerge from the data. It was an intensive method of coding as it required comparable reflection. The research design could include primary questions, goals, a conceptual framework and the literature review (Saldaña, 2009:139).

Photographs that pertained to each case were also important to this study. Descriptive phrases were noted on each image during the descriptive coding process. The descriptions lead to the identification of the particular theme per image. Each photograph was categorised according to a theme, and colour coded, according to its pertinence to the study through thematic analysis. Corresponding colours were assigned to the relevant themes in the adapted store image model.

Store B: Herringbone ceiling, V&A Waterfront, Cape Town
(Marie Claire, 2014).

Figure 3.4: Example of coded photograph

When working with multiple participants in a study, Saldana (2009) advises to code contrasting data by coding one participant's data first and then progress to the next participant's data. When coding each participant experiences separately, the one set of data may have been affected by the other, which allowed the process of recoding the data (Saldaña, 2009:18).

The focus group data, gathered during the focus group discussion and participants field notes made during their observed visits to the four stores, was coded and categorised according to the revised store image model, which only noted design influenced attributes. Refer to Figure 3.2 for a viewing of the adapted store image model. Only the variables that reoccurred were kept as not all data contributed as a design variable.

JANSE VAN NOORDWYKS STORE IMAGE DESIGN ATTRIBUTES		KEY WORDS TO NOTE WHEN VIEWING/VISITING EACH STORE	NOTES/COMMENTS
1. Atmosphere	Store Interior	CLEANLINESS SPATIAL QUALITY AESTHETICS THE STRUCTURE WALLS FLOOR CEILING T-grid ceiling with white gypsum panels, LIGHTING wood panels & black panels towards back of shop	Merchandising units damaged & tiles chipped Easy circulation but cluttered display Use of pegboard & low-cost merchandising units Black Square tube steel frame geometric grid-like structure Walls combination of white tiles, plaster & paint & wall cladding in wooden strips. - Wallwashers on perimeter + downlights central + spots (feature areas)
	Store Atmosphere	Designing retail environments that create personal and memorable customer experiences. SEE (COLOURS, DÉCOR AND NEATNESS) SMELL HEAR TOUCH TASTE	pendants hung in clusters of 3 at the back of shop (overkill) Predominant colours, white, black, timber & white tiles No particular smell, but it felt a bit stuffy & untidy Hip-hop street music which appeal to 10-25yr olds? All clothes accessible to touch Taste - none?
2. Convenience	Shopping Ease	EASY TO READ MERCHANDISE LABELS & TAGS EASY TO FIND MERCHANDISE SHOPPING BAGS DURING PURCHASING PACKAGING OF MERCHANDISE AFTER PURCHASING STORE ACCESSIBILITY STORE FAMILIARITY	The merchandise relatively easy to find because signage was clear. For example 'denim' white letters on black background. 'pay here' white letters on black background, suspended from ceiling signage lettering looked like scrabble squares Accessibility was satisfactory, yet it felt over cluttered Not pretentious, feels like value for money kind of store
	Store Layout	AISLE PLACEMENT - feature areas, highlighted with spots SPACIOUSNESS LAYOUT ↳ Ergonomically sound	LHS - Men's clothes RHS - Women's clothes Aisle used for special featured items & mannequin display Square black steel grid structure to 'frame' these aisle displays

Figure 3.5: Example of field notes written by focus group Participant C

Table 3.8: Example of Coded Participant Observations

THE FOLLOWING DESIGN ATTRIBUTES AND KEY WORD DESCRIPTORS WERE GIVEN BELOW AS A GUIDE FOR FOCUS GROUP PARTICIPANTS TO UTILIZE WHEN VISITING AND OBSERVING THE 4 APPAREL RETAIL STORES REPRESENTED IN CANAL WALK MALL & V&A WATERFRONT MALL IN CAPE TOWN						
OBSERVATIONAL GUIDING TOOL		**MIDDLE LSM LOCAL BRAND STORE D**				
JANSE VAN NOORDWYKS STORE IMAGE DESIGN ATTRIBUTES	**KEY WORDS NOTED WHEN VISITING EACH STORE**	**PARTICIPANT 1**	**PARTICIPANT 2**	**PARTICIPANT 3**	**PARTICIPANT 4**	**PARTICIPANT 5**
Store Atmosphere (store interior)	Designing retail environments that create personal and memorable customer experiences SEE (COLOURS, DÉCOR AND NEATNESS) SMELL HEAR TOUCH	SEE (COLOURS, DÉCOR AND NEATNESS) The atmosphere is non-descriptive and does not reflect calmness of the environment in which a person can browse. HEAR-The music is very loud and suits the type of clothing - Informal wear.	SEE (COLOURS, DÉCOR AND NEATNESS) The general feel of the store gave an impression of in and out. Getting what you want at the most affordable price. SMELL- The was a plastics smell – it could have been packaging or warehouse boxes.	SEE (COLOURS, DÉCOR AND NEATNESS) Predominant colours, white black, timber & white tiles SMELL-No particular smell enjoyed HEAR-Hip-hop street music which appeal to 10-25yrs olds TOUCH-but it felt a bit stuffy and untidy All clothes accessible to touch LIGHTING IMPACTS ATMOSPHERE: Pendants hung in clusters of 3 at the back of shop (overkill)	HEAR-In terms of the sense, there was music that played. Upbeat and current - it does make the space more inviting TOUCH-similar finishes were used as with other stores. Hard to touch, but merchandise is soft.	SEE (COLOURS, DÉCOR AND NEATNESS) Store D colours are prominent-Red, Grey, Black SMELL-Smell of food within the store HEAR-Store D Radio Music and adverts of what is new Announcements are constant to staff personnel
Shopping Ease (convenience)	EASE TO FIND MERCHANDISE STORE ACCESSIBILITY STORE FAMILIARITY SHOPPING BAGS DURING PURCHASING	EASE TO FIND MERCHANDISE-It is a horrible experience to find anything. Very disorganised. Limited assistance offered by signage	STORE ACCESSIBILITY /FAMILIARITY: Not very convenient. There was no flow on department adjacencies. EASY TO FIND MERCHANDISE Red store image colour was visible in their Price Ticketing and sale indicators. Found these to be helpful as you could see from a distance how much the items were or how much you could save or if the item was on sale.	EASE TO FIND MERCHANDISE relatively easy to find because signage was clear. For e.g. " denim" white letters on black background "pay here" white letters on black background, suspended from ceiling STORE ACCESSIBILITY satisfactory, yet it felt over cluttered STORE FAMILIARITY: not pretentious, feels like value for money kind of store	SHOPPING BAGS DURING PURCHASING- Shopping bags are available upon entry which assists in the shopping experience. EASE TO FIND MERCHANDISE Labelling of prices items are clear and highlighted.	SHOPPING BAGS DURING PURCHASING- Purchases are given in plastic bags accessible from entrance. STORE ACCESSIBILITY -Easy access to store.

Codes	Research question		Atmosphere		Convenience	
	Globalisation	Store identity vs brand:	Store Interior	Store Atmosphere	Shopping Ease	Store layout
Question 1 KAJ: The stores interior design encompasses the following: cleanliness, spatial quality; aesthetics; the structure, walls, floor, ceiling, lighting & air quality. With regards to the stores interior design envelope defined, describe the atmosphere you experienced in the store during your visit. Starting with Middle income stores			Participant C was very prepared. She made the most notes out of the 5 participants.			
	G	B	SI	SATM	SE	SL
CC: MrP store interior has a lot of **damaged merchandising units**, tiles were chipped and the **circulation** felt a little bit **cluttered.** It was easy enough to move through but the merchandise on the merchandising units were quite cluttered. It felt a bit stuffy, because when the question came up in terms of **smell** and the rest of the senses, Cotton On was fresher, had a **fresher smell** and felt like there was better air **circulation** through the space.			Cleanliness Maintenance	Smell		Circulation Easy to move through but cluttered
	G	B	SI	SATM	SE	SL
CC: Store Atmosphere: Cotton On is very **human centred.** There was a resonance between the product and the interior as there were frames				Human Centred		

Figure 3.6: Example of focus group discussion coded data

The comparative analysis allowed for the exploration of differences and similarities across all data collected to locate which data belonged within the same category. The more data generated in one category, the more it strengthened the category. It then clarified and created a clear divide between a difference and similarity found (Goulding (ed.), 2002: 69). The similarities and differences were generated between participant's written field notes and focus group discussion data. I also revisited the stores to note any changes that occurred since the stores were last visited by participants and to ensure that there were no inconsistencies between the observational data and secondary data. During the First Cycle coding process of analysis, simple themes were found and then woven together to explain the meaning of the data (Saldaña, 2009:140).

3.10.2 Second Cycle Coding: Pattern Coding and abstraction

Second Cycle coding was utilised to reorganise or reanalyse coded data. The codes that were conceptually similar were merged together, infrequent codes were then further assessed for meaning. Codes that did not add meaning to the study, that were perhaps deemed unnecessary or redundant were removed (Saldaña, 2009:149).

Pattern codes were important for explanatory data. Themes, configurations or explanations could be identified, grouping data into a smaller number of sets, themes or concepts. Pattern coding typically occurred during the second cycle coding process. It was ideal for the development of major themes (Saldaña, 2009:152). Similar codes were grouped together in pattern coding in order to create a common theme or concept. At the end of pattern coding one would have several major categories, themes or concepts (Saldaña, 2009:153).

The wide range of data collection ensured that data became saturated, due to the number of similar occurrences that occurred in the sets of data. The groups of data collected were then compared across cases to ensure that the research questions were answered. My observations, focus group observations, discussion and secondary public domain data were gathered together and compared to find further commonalities and differences across all data to produce findings.

The final stage of the data analysis process was abstraction. In order for this to be successful the abstraction phase involved theory development through construction of a core category. When the core category was found, the point of saturation was met. The core category was fully justified by the emerging theory, as it connected all the concepts and categories in order to reach the objectives of the study. It was traced throughout the analysis process as a significant theme. This was only revealed as all the data was analysed and formulated and integrated into one perspective. The key category was only recognised at the point of saturation (Goulding (ed.), 2002:88).

Once similarities and differences were found across all data through the coding process, each design attribute that linked to store image and globalisation was identified to understand how globalisation influenced store image in South African retail design. The high number of commonalities, traced between the four stores, indicated that globalisation influenced store design variables. Whereas, the limited extent of differences found, indicated that store identity was found in South African retail through the development of store image. The commonalities and similarities also depicted

whether globalisation was more influential in middle or high LSM stores and why this occurred. This revealed the core category of globalisation but also the extent that store image perceptions influenced store identity.

Table 3.9: Example of how all data was gathered and concluded, indicating the influence of each attribute individually (technology).

ATTRIBUTE			STORE	OBSERVATION		STORE IMAGE	STORE IDENTITY	GLOBALISATION
7. SERVICE	7.1 PAYMENTS & SERVICES	NEW IN STORE PAYMENTS & SERVICE OPTIONS	Middle LSM Store B	Store D offers new payment option You can now buy on account at Store B	No new payment options or services good promotion services. Loyalty card		✔	✔
			Middle LSM Store D		New payment option-shuffles numbers for security pin Advanced point of sales data logic system, credit card facilities, flat touch screen recessed into point of sales		✔	✔
			High LSM Store A	No new payment or service options	No new payment options or services point of sales dedicated to each department which provided comfort because one could choose to pay at either one.		✔	✔
			High LSM Store C		Conservative sales point Traditional sales point No new payment options or services		✔	✔
	7.2 TECHNOLOGY	NEW IN STORE TECHNOLOGIES	Middle LSM Store B	Store D more advanced	LCD screens by entrance		✔	✔
			Middle LSM Store D		Graphic Projectors LCD screens by fitting rooms Digital pads		✔	✔
			High LSM Store A	Vast differences Store A more advanced, but it is not visible	Technology throughout their supply chain Well-structured IT system		✔	✔
			High LSM Store C		No new technologies Standard till point		✔	✔

Table 3.10: Example of how all data was gathered and concluded, indicating the influence of each attribute individually (identity).

ATTRIBUTE			STORE	OBSERVATION	INFLUENCES	STORE IMAGE	STORE IDENTITY	GLOBALISATION
4. INSTITUTIONAL	4.1 STORE REPUTATION	4.1 STORE IDENTITY	Middle LSM Store B	Differences in design approach, quality, store image Not even advertising could influence the perception	Fresh Fun Genuine/trusted Easy living/Homely Quality and honesty to apparel Industrial Loft style		✓	✓
			Middle LSM Store D		Low to middle LSM Mass produced High volumes of similar apparel-instant fashion Low Quality All about Price and Fashion Young and upbeat Merchandise is focus Spend less on design Gone international in 2016		✓	✓
			High LSM Store A	Quality and design determines store identity	High end fashion International standards International brand Luxury Upmarket brand Minimalist design approach Spaciousness lends itself to luxury Exclusive Simplicity Sophisticated		✓	✓
			High LSM Store C		No marketing strategies High quality Upmarket Clear & effective design & layout African Heritage Luxury lifestyle		✓	✓

3.11   Data Management

Data management took place in my study which allowed for a lower risk of data loss, increase accuracy and verifiability. Digital and non-digital materials could also be preserved for a longer period, which allowed for an increase in the ability to re-analyse older data sets (Given, 2008:193). Digital data could be managed through secured data

storage methods, converting data into a number of formats, such as saving master copies, making back up files available to reduce the risk of damage or data loss and limiting access of files through password authentication, prohibited use for ethical reasons (Given, 2008:194). Non-digital data such as photographs, reports, newspaper articles and field notes were managed by clearly labelling them with meaningful identifiers. A digital copy of all meaningful data was saved and submitted to the CPUT data repository for safekeeping as per the Universities' data management requirements.

3.12   Conclusion

Synthesising is the amalgamation of all the data collected. Through merging the data, it was easier to find linkages through descriptive and thematic analysis. Differences and similarities, between the themes and concepts, were identified through comparison of individual observations, publicly available data and the focus group discussion provided understanding of what contributed to the aim of the study.

The common relationships emerged through abstraction, and conceptual identification, and finally theorising. The recordings of both individual and focus group observations, publicly available data and focus group discussions were presented through first and second cycle coding. Categorising related data that links to specific concepts. The data was questioned in order to reveal the most significant facts. The similarities found through comparison of the data was coded accordingly and the differences became new additional themes. Only the themes that related to the aim of the study remained for further analysis and abstraction. The themes presented in the adapted store image model are discussed in Chapter 4.

4. CHAPTER FOUR: FINDINGS

Findings were obtained through an observational analysis conducted within various malls within Cape Town, utilising Janse van Noordwyk's Store Image model attributes (2008) as an observational guide. To attain the following findings, two local brand stores and two global brand stores represented locally within South Africa, were chosen and observed by both the researcher and 5 focus group participants. Prior to the commencement of the observations, each store was approached by the researcher in order to gain consent to obtain photographs of each store. Permission was however not granted by store managers or their head office to take photographs within the relevant stores due to legal restrictions. Therefore, this research has been limited to utilising photographs sourced online as a secondary method of obtaining information.

The findings are presented according to 7 design related store image attributes and under each are descriptors which define each attribute. Within each store image descriptor, the researcher's observations, public domain photographs, information and focus group observations are discussed. Common similarities or vast differences found were highlighted, leading to a concluding summary to establish to what extent local and global retail brand store images are similar and why this has occurred. Reference is made to public domain figures more than once due to one image illustrating more than one significance to a store image descriptor.

4.1   Atmosphere

4.1.1 Store Interior

The stores interior design encompasses spatial quality; aesthetics; the structure, walls, floor, ceiling and lighting. With regard to the stores interior design envelope as defined, the atmosphere created is described below according to the headings mentioned within local and global brand stores categorised in the middle LSM and high LSM bracket in South Africa.

4.1.1.1 CLEANLINESS

Middle LSM Store B and D

Personal Observations

It was difficult to determine whether Store D was kept clean as the store was cluttered and overloaded with merchandise. The store was filled to its capacity with apparel, which affected the store appearance in cleanliness. The display units were not

designed at a suitable height to lift garments off the floor. Garments easily fall off the rails and hang very low onto the floor, causing them to become soiled. Store B's interior is made up of raw industrial finishes, such as exposed brick and concrete columns, but maintains a polished look and feel as the store is well structured in layout and consistent finishes.

Figure 4.1 confirms that Store D's store interior is overloaded with apparel, not only on each hanging rail but also covering a large floor area within the store. It is noticeable in this figure that along the walls, apparel hangs very low towards the ground.

Focus Group Observations

Focus group Participant 3 and Participant 5 both agreed that the cleanliness of Store D was not impeccable and stated that Store D's interior requires maintenance due to the many damaged merchandising units and floor tiles. Participant 4 characterised the entire Store B as clean in general.

Graphics displayed on timber wall slatted divider screen.

Same type of display system using grid like structure used in both male and female section

Projector displaying graphics onto wall-above normal eye level.

Combo of 600x600 standard ceiling tiles in grey and white finish-only placed close to wall and feature displays

White powder coated steel for displays

Store overfilled with apparel, difficult to see past all the apparel

Tiled flooring in female merchandise section

Walls are lined with merchandise/ apparel

Figure 4.1: Store D at V&A Waterfront, Cape Town

(Capetownsdarling, 2014)

High LSM Store A and C

Personal Observations

Both high LSM stores are clean in store appearance. Store A portrays a clinical look and feel due to the continuous use of white finishes. Store C utilises darker finishes, however it is well presented and balanced in layout and structure. Store A's all white finishes create a stronger presence in portraying cleanliness than Store C.

Focus Group Observations

The cleanliness of Store A was recognised by 4 out of 5 focus group participants. Store A stood out as clinical and minimalist to Participant 4. Participant 1 mentioned that their shopfront is completely clean and free of clutter to entice the shopper to enter the store. Participant 3 promoted the store's interior, referring to a "great feeling" of cleanliness. Visual merchandising units appeared clean and white to Participant 2. Participant 3 was the only one to identify Store C as clean. The remainder of the focus group participants were distracted by the pleasing aesthetics of Store C.

4.1.1.2 SPATIAL QUALITY

Middle LSM Store B and D

Personal Observations

Store D situated next door Store B in V&A Waterfront mall, appears to be smaller in size. Store D's positioning in the mall, located on a prominent corner impacts the store's spatial quality and shape (Refer to Figure 4.2). Due to its location in a tourist mall and compromised spatial quality, Store D has chosen to exclude their kids' range and provide a limited accessories and sleepwear range for females. Merchandising sections in Store D are constricted, warm and uncomfortable. General facility sizes are more favourable for Store B than Store D due to the difference in store size. More fitting rooms are provided in Store B than Store D. Store B has a number of small spaces that make up one large and quite spacious interior.

Focus Group Observations

Store D's spatial quality was described by focus group participants 1 and 3 as overpowered by overly cluttered visual merchandising units (Refer to Figure 4.1). Participant 1 highlighted an easy circulation route created in Store D. Two main aisles allow for an easy flow of traffic to the point of sales and the fitting rooms. The allocated space between merchandising units are narrow which do not accommodate for movement of trolleys between them. Participant 1 and 3 found the spatial quality of Store B to be easy and clear with a direct flow. Participant 1 identified that each

merchandising area in Store B is clearly demarcated to indicate adult, teenager and infant clothing, making it easy to navigate to the various merchandising sections. Focus group participants 1, 3 and 4 agreed that the spatial quality Store B felt different to the other stores due to the many brands housed in one store. All merchandising sections were spaciously divided into homeware, kid's wear, men's wear and women's wear. The experience explained was "shopping in a shop within a shop". Participant 1 added that the manner in which they chose to display their merchandise and organise their visual merchandising units in the store indicated that great consideration and care had been taken in creating a significant shopping experience.

Public Domain

Store B has begun shifting from small stand-alone stores to large-format stores which include all their brands simultaneously (Chain Store Age, 2014).

Figure 4.2: Victoria Wharf Ground and Lower level floor layout indicating Store D and Store B's spatial quality in V&A Waterfront, Cape Town.

(V&A Waterfront, 2015)

High LSM Store A and C

Personal Observations

Store A is larger in size than Store C (Refer to Figure 4.3 and 4.4). Store A's grandeur is greatly emphasised by store size. Store A and C utilised their different space capacities suitably in store design and layout. Store A's large store accommodates for a wider variety of merchandise and display units. It is easy to navigate within Store A and C as merchandise is divided up clearly into different sections with sufficient space for both male and female apparel.

Focus Group Observations

The abundance of space within Store A was expressed by Participant 3, which indicated a clear and crisp perception of space. Participant 4 noted Store A's linear spatial structure and organised layout. Store C's spatial quality was only described by Participant 2. It was mentioned that the wide aisle space led customers directly to the point of sales whilst all the remaining space became narrow and uncomfortable by the wall display units.

Public Domain

Figure 4.3: Victoria Wharf Ground and Lower level floor layout indicating Store A location in V&A Waterfront, Cape Town.

(V&A Waterfront, 2015)

Figure 4.4: Canal Walk Upper level floor layout indicating spatial quality of Store C in Canal Walk Mall, Century City, Cape Town.

(CanalWalk, 2018)

4.1.1.3 AESTHETICS

Middle LSM Store B and D

Personal Observations

Store B's store interior is more considered than Store D in choice of finishes, fixtures and fittings to portray a designed concept. It was noted that Store D utilised many standardised finishes and fittings when compared to Store B. Store D has a slightly upmarket look and feel, which could be due to its location in a tourist mall. They consistently utilised the colours: white, red, and black; and timber and steel finishes throughout the interior space. Store B presented a consistent face to their consumers by paying close attention to detail. Exposed finishes; such as concrete, brick and unfinished timber are integrated as a base, with colour hints of white, red and black. Each area within the store is designed differently for its purpose. Different finishes or fixtures were incorporated to make each smaller space unique within one large space. Eg. Darker finishes are utilised in the male merchandise section versus lighter finishes utilised in the female merchandise section. There were differences seen between each middle LSM stores aesthetics but each store utilised similar branding colours.

Focus Group Observations

The general feeling of Store D was considered by Participant 2 as standard. It was explained that there was no exclusivity or any special shop fitting or design intervention. The aesthetics of Store D was observed by Participant 1 to be very modular in order to be easy adapted to the various stores shape and size. The modular display units can be adjusted to fit the size of the clothing on display. Store D was described by Participant 4 to be all about the visual impact. Due to the very busy nature of the store,

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it grabs your attention at every corner. It was seen by Participant 4 that this type of aesthetic is aimed at youngsters who want fast fashion at affordable prices, thus suitable for Store D's target market. Participant 1 noted that Store B's aesthetics focuses on leisure wear for every day. The colours used in the space was described by both Participants 1 and 4 as more subdued. The varied finishes utilised on the walls, ceiling and floor showed off the various areas. Store B was described by Participant 3 as an industrial loft styled environment due to the timber and exposed brick finishes utilised. They did not try and hide the roughness with clever timber details as it was quite relaxed. Participant 4 thought that Store B did the most things successfully in terms of design, concept and layout between the two middle LSM stores, with a more current aesthetic.

Public Domain

Store B appeared to be quite spacious, filled with light, and an array of finishes to create a relaxed "Australian style". Visual Merchandisers were given a clean interior base comprising of a mix of brick, wood and concrete finishes to set-up spaces to be dominant, bold, confident and colourful (Chain Store Age, 2014).

Ferrier Hodgson's retail leader, James Stewart says, *"Stores are relatively inexpensive to put together so the capital investment is not very high and their payback period is very fast"* (Mitchell, 2015).

High LSM Store A and C

Personal Observations

Both store interiors were very differently addressed in terms of finishes, fixtures, fittings and style. Each store developed a unique brand and identity. Store C is a unique South African based store with an African luxury aesthetic. Materiality in Store C is strong and consistent. Their finishes and fixture choices allow for a completely different look and feel. Great efforts were made in addressing detailing within the store, such as in the bespoke visual merchandising units, louvered doors and door handles. The store interior promotes a prominently masculine emphasised brand, whereas Spanish based Store A promotes a stylistic international runway fashion aesthetic. Store C included dark and detailed finishes (Refer to Figure 4.5) whereas Store A included basic, sleek, light and bright finishes with colour hints of black and dark grey. The monochromatic background was utilised to showcase the fashion as a piece of art on a fashion runway or painting in an art gallery exhibition.

Focus Group Observations

Participant 1 stated that signage is not required for Store A because shoppers can clearly identify the store from the clutter free designed shop front and specific finishes chosen for the store. Participants 3 and 4 supported this statement. All participants agreed with Participant 1 that the entire store incorporated the same fittings and fixtures with no demarcated areas for the various merchandise types. The same colour theme was recognised by all participants. Store A consistently carried out the use of black, white and grey colour for the walls, ceilings, floors and display units. The overall aesthetic of Store A was described as minimalist by Participant 3 and 4, due to the clean lines, 90-degree angles and minimal colour in monochromatic colour choices.

It is evident that Store A implements the same approach to store design in all global locations. They included the same type of lighting, colour choices, finishes, fixtures and display units in the store depicted in Hong Kong (Refer to Figure 4.6) and in South Africa (Refer to Figure 4.7 and 4.8).

All participants agreed and had very similar comments regarding the aesthetics of Store C. The aesthetics of Store C was associated with the lifestyle similarities of a *"gentleman's club meets library meets old money meets Africa"* described by Participant 1 (2017). Participant 4 agreed with Participant 1's statement. Store C's efforts was well recognised by all participants in creating a strong sense of exclusiveness and quality. The layering of textures; finishes and fixtures contributed to the aesthetic. Participant 2 (2017) described it as a *"Rich timber feel with a vintage and royalty theme on fixtures."* Participant 1 noted that even the manner in which staff addressed the shopper was much more formal and fitting of the look and feel of the shop. Participant 4 supported Participant 1 (2017) saying that "*The aesthetics of the store gives an impression of a high level of sophistication.*" (Refer to Figure 4.5)

Wall in fitting room filled with framed decal images and bone chandelier

Animal head on wall-Nguni Logo. Presence of Africa

Using Chandeliers as large feature lighting throughout the store

Masculine Feel
Quite a dark interior due to the finishes used e.g. Rich dark timbers.
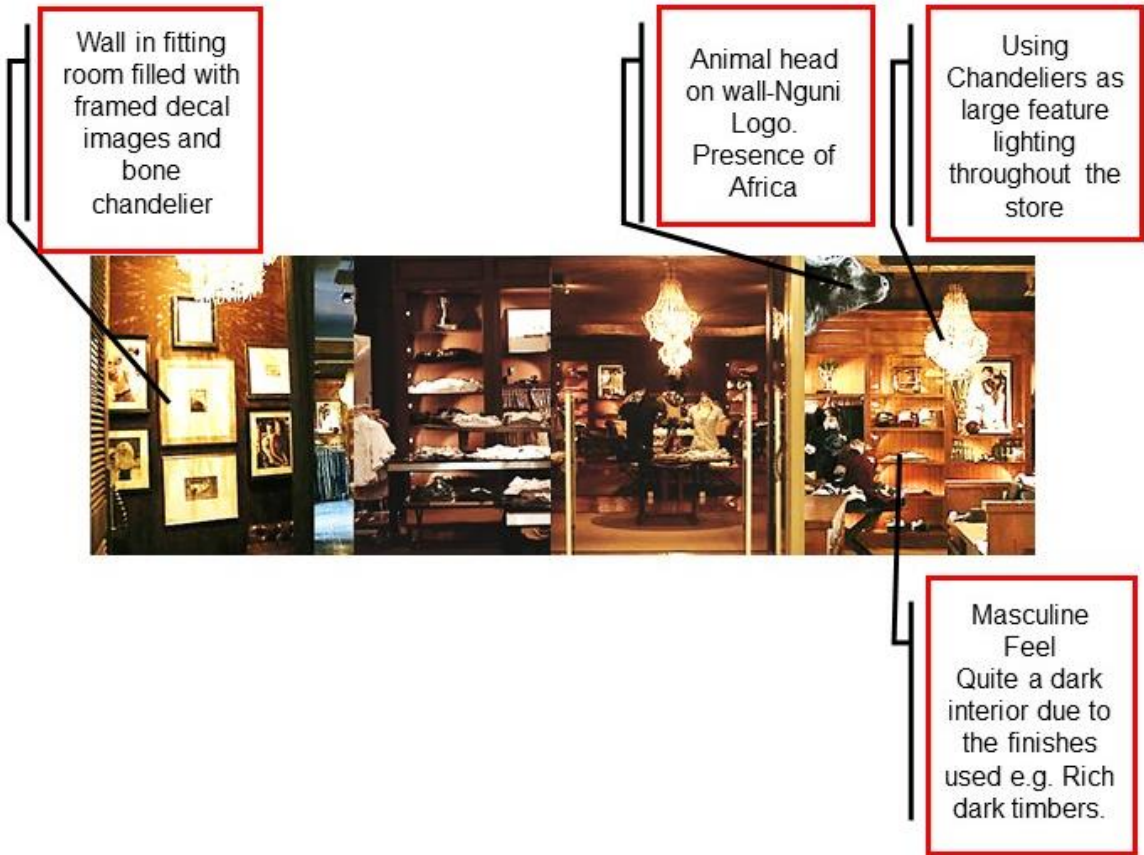
Figure 4.5: Store C Interior, Canal Walk Mall, Century City, Cape Town.

(KingsleyHeath, 2018)

Same lighting as Store A in SA-Strips of light integrated in bulkhead

Same type of side hanging display designs as used in Store A in SA

Same type of table display stands for folded garments

Same ceiling-white lowered bulkhead over entire store

Same minimalist approach-consistency in design and store image

Same floor finish as Store A in SA-Tiled flooring

Same colour scheme and material usage in the space as in Store A in SA

Figure 4.6: Store A by Elsa Urquijo Architects, Hong Kong.

(Inspirationfeed, 2018)

Mirrors fixed to columns

Walls are lined with built in visual merchandising display units

Powder coated steel Hanging rails with white solid base for shoes or bags

ceiling-white lowered bulkhead over entire store

Table display stands for folded garments

Tiled flooring

Black, white and grey colour scheme

Figure 4.7: Store A: Store Interior at V&A Waterfront, Cape Town.

(Mlbarch, 2013)

Figure 4.8: Store A: Store Interior at V&A Waterfront, Cape Town.

(Mlbarch, 2013)

The aesthetic of Store C enthralled focus group participants. References were made to the rich materiality and detailed fittings and fixtures utilised within the interior which portrayed a high quality and sophistication. Public domain information also indicated the great attention to detail and quality of materiality in Store A which added to the aesthetics of the layout, which conveyed a sense of lightness to the store (Café du Cap, 2012) (Refer to Figure 4.5)

4.1.1.4 THE STRUCTURE

Middle LSM Store B and D

Personal Observations

Columns made up Store B and D's interior structure. The columns are seen as obstructions inside a retail store, influencing the store layout. They require a purpose or disguise to not be fully exposed. There are many columns in Store B due the great size of the store. They are however, not utilized to the stores advantage. The small in width columns are kept clean, completely raw, in a non-plastered concrete finish. Due to the number of columns it caused circulation issues.

Store D had very few columns in the store space. Their columns are wide and were made to stand out. They were either painted black or white with fun quotes fixed onto the column walls in lower case coloured lettering (Refer to Figure 4.9) They are utilised to advertise the store's identity, adding humour and fun to the shopping experience. The columns in Store D are seen as an obstruction, as they have been incorporated with store visual merchandising feature displays in the centre of the store. The columns acted as a backdrop to the displays (Refer to Figure 4.10).

Focus Group Observations

Participant 3 communicated that Store B and D was densely packed with merchandise and did not utilise their columns well for a measure of purpose to assist to the customer. However, both Participant 1 and 3 recognised that Store D and Store B utilised the columns for display purposes (Refer to Figure 4.10). Participant 1 mentioned that middle LSM Store D and Store B would rather want to maximise the amount of merchandise displayed than focus on the stores structure.

White columns with black and red store brand letters in lower case.

you're about to look even hotter

Quotes are quirky and fun and add to the stores aesthetic/store image

Figure 4.9: Store D: Signage on Columns.

(Glamouronthego, 2014)

Spotlights. Some are directional and others not

Timber slatted screens as dividers for feature display

Painted structural column. Graphic on column mimics the divider screen

600x600 standard ceiling tiles- painted in varied shades Randomly placed

Grey Tiled flooring. Varied floor finishes. Timber and tiles

Raised timber floor area for feature display

Mannequins on raised plinths

Varied Types: Freestanding display rails in black steel

Figure 4.10: Feature Display placed around structural column in Store D at V&A Waterfront, Cape Town.

(Emmajanenation, 2014)

High LSM Store A and C

Personal Observations

Each store was well structured for the size of the space allocated. Store A's store structure created a catwalk in which the mannequins paraded the merchandise and the visual merchandising displays showed off the latest fashion with the use of quality lighting and light-coloured finishes. The visual merchandising displays form "U" shaped units which becomes the unified structure of the store along the wall's perimeters. Tall black framed mirrors are fixed to the columns and displays in Store A which mirrors the store to seem larger than it already is. Store A's structure accommodates for a large female apparel section, a smaller section for male apparel and an even smaller section for kids' apparel. Store C's store interior is well structured to allow for a spaciously

balanced male than female merchandise allocation. Store C has halved the store structure in such a way that the point of sales is central, seen clearly down the wide central walkway. Majority of the wall space and full floor to ceiling height is utilised on either side of the store for merchandise display.

Focus Group Observations

Participant 1 felt that Store A's layout was intentionally well structured and ordered throughout the store. Participant 1 elaborated that the minimalist layout allowed for visual points throughout the store, enabling one to see the entire store from certain viewpoints such as the fitting rooms and point of sales for security purposes. This helped to manage the amount of staff positioned at the point of sales and the fitting rooms due to its positioning right next door to one another in the female section. The utilisation of mirrors fixed to the columns was strongly highlighted as a requirement of importance in stores as an asset to the experience of the store.

Participant 3 contributed that in Store A there was an abundance of mirrors placed on columns, offering a sense of relief to customers. Participant 3 explained that one would not need to worry where the next mirror would be to visualise yourself in a garment. The mirrors were enjoyed by Participant 3 as it provided a distraction from viewing the columns in the store layout and acted as a pause in the abundance of merchandise. (Refer to Figure 4.7)

Participant 3 (2017) said: *"They were very strategically placed, very sporadically, every so often. They spaced them equidistantly every so often and I really like that, that in terms of experience it enhanced the store"*

Participant 1 added that in some cases, the columns were completely cladded with mirrors on all four sides creating the illusion that they disappeared. Columns in Store C were not highlighted as they were not noticed by any of the participants. Only Participant 1 mentioned the utilisation of their merchandising units to create pathways in the store. Participant 3 noticed the use of mirrors in the fitting rooms. Overall, columns were most utilised within Store A as mentioned by Participant 1 and 3.

4.1.1.5 WALLS

Middle LSM Store B and D
Personal Observations

Store B and D utilised very similar wall finishes. Both Store B and Store D utilised slatted walling systems for visual merchandise display. Store B utilized a store-bought slatted walling system that was directly attached to their white or black painted face brick walls. Timber shelving was incorporated within certain sections of the wall displays for folded items. The slatted walling system was not seen as a distraction as the industrial design concept carried out in store made exposed finishes acceptable. Majority of the wall space in Store D was covered by merchandise. Face brick walls are painted in black, grey or white, similar to Store B. Store D utilized a slatted walling system that involved timber panelled wall cladding, in which the slats are fitted on top of. Custom designed black galvanised steel square rods emphasised certain merchandising areas to distract one's eye from focusing on the slatted rails.

Focus Group Observations

Participants mentioned varying wall finishes for Store D depending on its purpose. Participant 3 identified Store D's wall finish combinations in white tiles, plaster, paint and wall cladding in wooden slats. Participant 1 revealed that the walls that are cladded with timber panels were designed to the hide the merchandising mechanisms. Participant 1 identified that Store B and Store D are similar in that they both showed varied finishes for the walls to distinguish various areas. Store B and D both had bagged and painted brick walls but Store B incorporated various mechanisms fixed to these walls to distinguish them.

High LSM Store A and C
Personal Observations

Each store differed quite significantly in colour, style and detailing for the walls. Walls in Store A are lined with custom built display units (Refer to Figure 4.8). The entire floor to ceiling height was not fully utilised due to its tall height. The walls are painted white to seamlessly blend in with the display units. Walls in Store C were painted a clay colour with detailed cornices, dado rails and large skirting mouldings. Visual merchandising display units along the walls are all custom-built. All open wall spaces display large black and white graphic of models wearing their merchandise.

Focus Group Observations

Store C's walls were not visible to Participant 2 as merchandising units are built in throughout from floor to ceiling along the walls. The small area of wall that is exposed had high detailed skirting's and timber panels to dado rail height in a dark textured wood. Store A's approach to the store interior was the opposite. Participant 3 described it as all units being designed to touch the store lightly along the perimeter; it did not seem nailed or fixed to the wall. Walls and visual merchandising displays along the perimeter were well lit. Each perimeter unit had tube tracks recessed into them, flexible for different hanging rails. Participant 3 expressed that all wall units portrayed a clear and crisp perception of the space and offered a sense of flexibility. The integration of the rails into each unit was appreciated and seen as beautiful design.

4.1.1.6 FLOOR

Middle LSM Store B and D
Personal Observations

Both Store B and D alternated between different type of floor finishes which distinguished different areas or zones within the store interior. A large bulk of the floor within Store B was tiled in both the male and female merchandising sections. Blue, white or red lines vinyl coloured strips demarcated certain visual merchandising display areas within the store. It distinguished between male or female merchandise sections. Timber flooring was installed in the female "Body" merchandise area and female fitting rooms section (Refer to Figure 4.11). The floor in Store D was tiled around the point of sales, which highlighted a large portion of the pay point area. Timber flooring was utilised throughout the remainder of Store D. The changes in floor finish in Store B indicated more demarcated areas than in Store D. Store B utilised the floor finishes to create a certain atmosphere within each section, e.g. timber flooring utilised in the female section created a lighter, feminine atmosphere. Concrete flooring utilised in the male merchandising section created a masculine feel.

Focus Group Observations

Participant 1 identified that the floor finishes utilised in Store D and B were homogenous. Participant 1 noticed that Store B's floor finishes created clear path ways to indicate traffic flow. Participant 4 agreed that this particular store paid more attention to detail with the integration of varied floor finishes than other outlets visited. Participant 3 noted large floor tiles utilised for majority of the floor space that changed to timber in certain areas such as the "Body" section in Store B (Refer to Figure 4.11). Participant 4 noted the clever flooring solutions that were introduced at the front of Store D.

However, Participant 2 disagreed, mentioning that the timber finish did not add significant meaning or logic to their store layout.

Public Domain

Figure 4.11: Store B: Store Interior "Body" section.

(Flair, 2014)

High LSM Store A and C

Personal Observations

The floor finish utilized throughout Store A was large, cold and white porcelain tiles. Porcelain tiles are very durable and easy to maintain for high traffic areas; therefore, it was a good choice for the large floor area in Store A. Store C utilised polished concrete flooring throughout their store. Animal skin rugs and sisal carpets were loosely laid over certain areas within the store. This created a warm and welcoming feeling as one

entered the store and contributed to the African luxury element of the brand (Refer to Figure 4.12).

Focus Group Observations

All participants specified the same tiled floor finish in a neutral colour utilised throughout Store A. Participant 3 elaborated that it made it less complicated, cohesive and looked neat and tidy. Participants 1, 3 and 4 all noted the kilims and the clay coloured sisal carpets that loosely lay over the concrete screed flooring. They described that the choice of floor finishes created a homey feel in Store C (Refer to Figure 4.12).

Public Domain

Figure 4.12: Store C: Variation in floor finishes.

(Google maps, 2018a)

4.1.1.7 CEILING and LIGHTING

Middle LSM Store B and D
Personal Observations

Store B had a herringbone constructed timber slatted ceiling structure in central parts of the store. The herringbone ceiling was utilised to highlight the pay point area and the

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entrance of the store. Large directional spot lights hung from the herringbone ceiling (Refer to Figure 4.14). Pendant lighting was utilised at different heights within the herringbone and timber cladded ceilings. There were white painted plastered ceilings with track lighting, down lighting, and air vents fitted in the accessories, footwear, jewellery and make-up section. There were white timber panelled ceilings which matched the white columns and white painted face bricks walls in the "Body" (undergarments, sleepwear and active wear) area. Some areas within the store included a lighter beech timber ceiling. White track lighting and spotlights were fitted to the timber and white painted ceiling (Refer to Figure 4.11).

The ceiling in Store D was addressed differently at the façade area to emphasise the window displays. Vertical panelling with hidden light fittings were used to create a bright, well-lit display window. Vertically and horizontally placed standard industry 600 x 600mm ceiling boards were used throughout Store D. Some ceiling panels in certain areas are different shades of grey or timber rather than white standard plastered ceiling boards. The varied ceiling panels are randomly placed over visual merchandising displays throughout the store.

Store bought air-conditioning vents and light fittings were utilised. A combination of round air-conditioning vents and 600x600mm tile vents were fitted in the standard ceiling boards. There were 7 vertical ceiling boards, equally spaced, hanging between the 600x600mm tile block. The point of sales was the only area within Store D that had a lowered plaster board overhead bulkhead. Spotlights were utilised throughout the store with pendant lighting grouped in clusters, prominently integrated in the footwear area. This created large amounts of light over one area within the back of the store (Refer to Figure 4.13).

Focus Group Observations
Participant 1 and 2 noted that Store D utilised a standard ceiling which consists of 600 x 600 mm panels and recessed lighting. Other types of lighting such as track lighting was utilised to highlight various areas of focus however, these were not used to their full potential. Participant 3 identified the use of wall washers on the wall's perimeter, downlights and spot lights over feature areas. A steel framed structure hung from the ceiling, lowering the floor to ceiling height.

Participant 2 noticed that Store B utilised more than one type of ceiling finish and ceiling type, in the same way they addressed floors which created a sense of comfort. Participant 2 described when walking into Store B that he was welcomed by a criss-

cross timber ceiling that gave a very warm feeling as you entered the space. Participant 1 noted plastered ceilings in some areas and other areas highlighted by bulkheads, which included track lights and spotlights mentioned by Participant 2. Participant 4 noted that the ceilings were designed in such a way that it informed the circulation throughout the store.

Participants 3, 2, 4 and 5 agreed that lighting for Store B and Store A was better executed within the store when compared to Store D and Store C. Participant 1, 2 and 3 expressed that Store B successfully utilised lighting to highlight certain areas using bulkheads or spotlights, playing on how the ceiling was designed for its purpose. This created a dynamic on how the merchandise was represented. Participant 2 indicated that Store D utilised ordinary ceilings to a degree with standard lighting to illuminate the entire store's merchandise. The lighting did not focus on particular items or areas. Only a few pendant lights were added to provide character to the space.

Participant 3, a lighting specialist in the field, mentioned that Store D overused their lighting. The abundance of pendant lighting in one area caused a degree of discomfort as that many pendants were not needed one area. Participant 3 and 4 agreed in this regard. Participant 3 added that Store B lit all their vertical surfaces very well so your peripheral vision was beautiful throughout the entire store. This automatically made one feel comfortable. Lighting was more sensitively executed as Store B had decorative fittings in the children's area, but it did not give any discomfort or glare because it was the right type of fitting.

Directional Spotlights

Clustered grouping of pendant lighting

Standard Sprinkler system and aircon vents

600x600 standard ceiling tiles in Timber finish. Randomly placed

White horizontal wall panels for slatted walling display system

Entrance to fitting rooms, with hanging signage and LCD screen on wall

Black and white Signage for shoes- Individual letters hung

Contrast between white vertical wall panels and horizontal timber wall cladding

Figure 4.13: Randomly placed timber ceiling tiles and clustered pendant lighting in Store D at V&A Waterfront, Cape Town.

(Emmajanenation, 2014)

Figure 4.14: Store B: Herringbone ceiling, V&A Waterfront, Cape Town.

(Marie Claire, 2014)

High LSM Store A and C

Personal Observations

There are large differences in the way ceilings were addressed in both stores. The ceiling in Store A had been lowered creating a large bulkhead and wide shadow gap. The shadow gap ran along the entire outline of the bulkhead with lighting embedded around the rim. The ceiling bulkhead mirrored the layout of the built-in merchandising display units throughout the store. Fire signage was placed on the walls in Store A, making use of the high floor to ceiling space above the display units fitted along the walls. Three-dimensional glossy black lettering hung from the ceiling in Store A by the entrance to each individual section to indicate where the men and kids' merchandise are situated.

Both stores developed lighting systems for their display units. In Store A the same ceiling and lighting system was carried through their store in the ceiling bulkheads and lighting within the merchandising units. The lighting was well thought through, incorporated into the visual merchandising display units for Store A. The visual merchandising displays in all 3 sections had recessed LED lighting strips which were installed on the top and bottom of each display unit. This created a consistent and continuous line of light throughout the store. It was a well-lit space which portrayed a sense of grandeur due to the large floor space and use of reflective finishes such as mirrors and gloss melamine. These elements played off well against the accent and ambient lighting.

There was sufficient and a good variety of lighting utilised in Store C. Ceilings in Store C were draped with elaborate bone chandeliers, which welcomed customers as you entered the store and directed one towards the point of sales. The ceilings in the fitting rooms were high to accommodate for the same chandelier. The design of the chandelier was a combination of beads and crystals which blended in well with the rest of the décor throughout the store. Lighting was subtle, with spot lights articulating the luxurious store interior. The lighting for the display units were built in the sides of each unit. The tracks were built into the inner sides of the unit, with each small spotlight directed at the merchandise. Large black spotlights ran on these tracks throughout the store.

Focus Group Observations

Participant 5 noted that Store A integrated both ambient and accent lighting into the space. It was identified by Participant 4 that Store A's ceiling and lighting was very cohesive, much the same as the flooring. They had linear lighting strips and track lighting symmetrically placed. Participant 4 mentioned that everything was balanced even how they distributed and displayed their merchandise. Participant 2 enjoyed that the high ceiling was not taken up by tall merchandise units. It was all white and clean above the visual merchandising units, everything at the same level, with no merchandise displayed above 2 meters in height. There was a colour theme carried out through the ceiling and lighting with two-tones of black and white. Participant 3 and 5 noticed that the ceiling was reflected around the perimeter of the space as a lowered bulkhead with recessed hidden track lighting. Participant 3 observed that Store A was also successful in highlighting certain areas. The ordered track lighting and reflected recessed ceiling lighting included around the perimeter of the bulkheads worked in their favour.

Only Participant 1 noted the plastered ceiling in Store C with lighting strategically positioned with much dimmer general areas. Participant 5 noted the detailed cornices framing the plastered ceilings. Participant 5 indicated that both accent and ambient lighting was included in Store C. Participant 3 noted the unique shell chandeliers utilised as ambient lighting in their space. Participant 4 mentioned that the lighting was specific to the merchandise and not the entire store as not all areas were well lit. This added a significance to the feel of the space. Participant 1 enjoyed the clever way in which the lighting was hidden in the merchandise displays for Store A and C.

4.1.2 Store Atmosphere (Intangible Design)

Within a retail store, environmental cues, such as store design and atmosphere, can have a noticeable effect on a customer. The senses were affected by the store experience created such as music, colour, scent, and crowding of people. These were all significant role players in what a consumer perceived and believed to determine what was a good retail store or brand. The look and feel of a store could contribute to the impact of the overall shopping experience (Grewal et al., 2014:23).

Store Atmosphere is designing retail environments that create personal and memorable customer experiences. How each stores atmosphere has been influenced by the senses is explained below in comparison of local and global stores categorised in the middle and high LSM bracket in South Africa.

4.1.2.1 ATMOSPHERE EXPERIENCED

High LSM Store A and C
Personal Observations
When visiting the store, I experienced that security kept a watchful eye on customers on a digital display screen installed within a platform by the store entrance. Staff members also kept a watchful eye on customers within each merchandising section. I approached the manager to ask if I could observe the store and make notes. The manager agreed, as long as no pictures were taken. As an Interior Designer, sketches and visual aid is important in gaining information when analysing anything. I took to my notebook and continued to draw a basic layout of the store. I was immediately stopped by another member of staff and thereafter the manager followed to warn me that I was not allowed to draw anything. It was mentioned that I am not at liberty to steal store layouts, and it was seen as form of plotting a store robbery. He informed me that the

security kept a watchful eye on me the entire time from cameras posted, not only sending feeds to security within their store but also sent to the head office.

Focus Group Observations

When visiting Store A, Participants 4 and 5 felt uncomfortable due to the high security. They did not have a good experience as they were questioned about their visit to the store and were told to leave. They were not allowed to take pictures.

Participant 4 (2017) said: *"The experience made me aware that they wouldn't want me to make notes while being in store."*

Participant 5 (2017) said: *"They wanted to know why I was there and If I wasn't coming to buy anything then I should please leave."*

4.1.2.2 SEE (COLOURS, DÉCOR AND NEATNESS)

Middle LSM Store B and D
Personal Observations

Store B and D's colour choices incorporated in their signage and within store design were similar. Both stores utilised the colour red, white and black. Store B was neater than Store D. In Store D the display units were overly cluttered with merchandise, which hung low, reaching the floor. This indicated that the length of the merchandise was not accommodated for in display design. Men's wear could easily be mistaken for women's wear because visual merchandising displays were placed quite close to one another. It was observed that Store D utilised many standard, low cost finishes and fittings when compared to Store B. Store B utilised face brick, concrete and timber as a consistent base in its structure. They then incorporated various finishes, and made specific colour choices for each area to distinguish each section from each other. Store B was more specific in what they want to achieve in each section. Darker colours and finishes were used in the men's section to feel more masculine and lighter colours and finishes used in the women's section to feel more feminine. Overall, this created a raw, exposed yet relaxed feel.

Focus Group Observations

Participant 3 described Store B as very human centred. There was a resonance between the product and the interior according to Participant 3. There were framed photographs of people and animals, which felt homely. The finishes incorporated portrayed a loft type space. Vibrant colour was illuminated in a screen behind the point

of sales. White, black, grey and red were repeated throughout the store, however it changed to pink and white to feel more feminine in the "Body" area (Refer to Figure 4.11 for "Body" area). Store D was described as a lower income clothing store that was pushing product, which felt less homely.

Participant 4 noted that the look of Store B was generally a neat one. The utilisation of various fixtures and fittings greatly influenced their aesthetic. Participant 2 disagreed with regard to the neatness of the store, mentioning that the store was cluttered and that it did not provide adequate space to engage within the store. Participant 1 noted that their colours were subdued and clothing on display units were neat, which showed a level of sophistication when compared to Store D. It appeared to Participant 1 that Store B was focused on a different target market to that of its competitor. Store D's merchandise was of a similar mass-produced genre but the manner in which Store B addressed their store interior showed greater care.

Participant 3 and 5 noticed that the predominant colours used in Store D were red, white and black with timber finishes. Many pendant lights hung in clusters at the back of the shop which created an uncomfortable environment (Refer to Figure 4.13). Participant 1 felt that the atmosphere created in the store was non-descriptive. What Participant 1 saw in store did not reflect the calmness of an environment in which a person can browse. Participant 2 felt a similar feeling in Store D, mentioning that it gave the impression that one should not spend a long period of time in store. The reason for visiting should only be to get what you want, quickly and at the most affordable price.

High LSM Store A and C
Personal Observations
Each stores atmosphere was aligned differently to its target market. Store C offered a holistic retail experience by including scents, touches and hues of Africa. Warm, rich and dark timbers were utilized throughout the store which created a strong masculine feel to the store (Refer to Figure 4.15). Store A was all white in appearance with touches of sleek black lines. Store A relied on its all-white appearance, order and structure to showcase the fashion as a piece of art on a fashion runway or painting in an art gallery. The store atmosphere could be misinterpreted as cold and uninviting due to the consistent use of white and black throughout the store. The all white used as the backdrop was a deliberate choice made for the fashion to become a display piece. Reflective finishes such as mirrors and high gloss melamine were incorporated. The colours remained the same but the quality finishes brought variety to the space.

Focus Group Observations

When Store A was discussed, participants described the store interior as a minimalist design approach. Participants 2, 3 and 4 noted the monochromatic colour scheme, utilising only black, grey and white. Participant 4 mentioned that they did not have any props with their mannequins or clothes. The clothing called for attention, instead of the displays. Participant 4 (2017) summarised it*: "For me the store was more like the canvas and the clothes were the art"*

Participant 3 (2017) described Store A's ladies fitting rooms as a dance hall in a horse shoe shape, as you walked in there was an abundance of mirrors. *"As you exited your luxuriously large fitting room and do a little waltz you could see yourself in the front of large mirrors".* This created a space for friends to join you in a contained fitting room space. Participants 2 and 4 mentioned that it contributed to the store atmosphere. Participant 2 described it to be quite a memorable experience while waiting for his girlfriend. He watched his nephew running around in the large area and saw him in the mirror's reflections. The men's and children's fitting rooms were not as luxurious, but the ladies had lovely large mirrors in the fitting rooms and "dance hall".

Participant 1 noted that the shop was very neat which gave the illusion of sophistication. She noticed how the black panels utilised for the point of sales were textured to play with the lighting effects provided by the focused lighting in this area. As you walked into Store C the separation of ladies and men's wear was appreciated by Participant 4. Participants 4 and 5 described the store as a gentleman's club due to the rich leather seats. Participant 3 described an interior capturing a spirit of Africa and adventure. A safari type feel was created due to the display of beautiful indigenous pieces incorporated in their visual merchandising units. They utilised canvas stretchers with leather detail, and beautiful old timber tables which looked like teak, on which to display tiered merchandise. They displayed many indigenous artefacts and decor items, such as proteas, baskets and a buffalo head behind the point of sales. The buffalo horns were also added in the fitting rooms on which to hang clothing. Even the door handle to the changing room was a custom-made buffalo horn, all described by Participant 3. Participant 1 and 3 conveyed that it gave the shopper an idea that it could be collectables found on travels through Africa. The store image made it apparent to the shopper that a designer was involved through the bespoke dark textured wood details.

Participant 3 noticed the little details such as the door to the fitting room was a louvered timber door for ventilation. It gave you the sense of an old colonial house, accommodating for a hot Africa day. The louvers were also carried through to the point

of sale. They made use of a variety of displays. They had flat hanging; side hanging and a puck wall in which you could change the height of the display. The puck walls had rods and hooks where they would casually hang the gentlemen's pants. They were casually hanging them like you would at home, not on a traditional hanger. This was seen as quite a clever approach; however, their merchandise was predominately male with a limited female range. Participant 4 noted that the store was found to be immaculately neat with everything on its place. It depicted that one would immediately know upon entry, that it is for the established adult with a taste for quality.

Public Domain

Store A's display areas and furnishings were designed to convey a sense of simplicity and elegance (Bit foundry and Trennery, S, 2014). Store C's aim is for Africa to shine through in its originality, diversity, authenticity and creativity; all of which are essential components of what defines luxury. The Store C logo of the Nguni, which is an African symbol of wealth and prosperity was emphasised on everything within the store, from the display's units, point of sales, on the walls in the fitting rooms, on the merchandise itself, and on the graphic advertising posters on the walls and in the display windows. This created a strong presence in what the brand signifies as a leading luxury brand within South Africa, showcasing a unique African aesthetic, steeped in tradition and rich cultural heritage (Emaar Malls, 2012).

As mentioned on Store C's Facebook page, Karen Blixen one of the great writers said: *"The celebration of our African life is evident everywhere - an exotic, luxurious old style, with a new mood and soul"* (Facebook, 2015).

Store C lives up to its African heritage whilst creating a holistic experience for shoppers visiting the store. From the wooden rugged look, adventurous spirit, smell and everything in the room sets the mood for an African journey. The outlet created an experience that goes beyond artificial environments to immerse shoppers in a virtual safari. Clay coloured walls with polished wood fixtures and furnishings, generous leather arm chairs and ceilings draped with elaborate bone chandeliers welcome adventurers alike (Facebook, 2015).

Detailed Visual merchandise displays are constructed using dark timber

Using Chandeliers as large feature lighting

Framed graphics in black and white

Using décor objects on shelving to add to the store experience

Emphasises heritage in hashtag with their store name

Description of the store atmosphere and store image
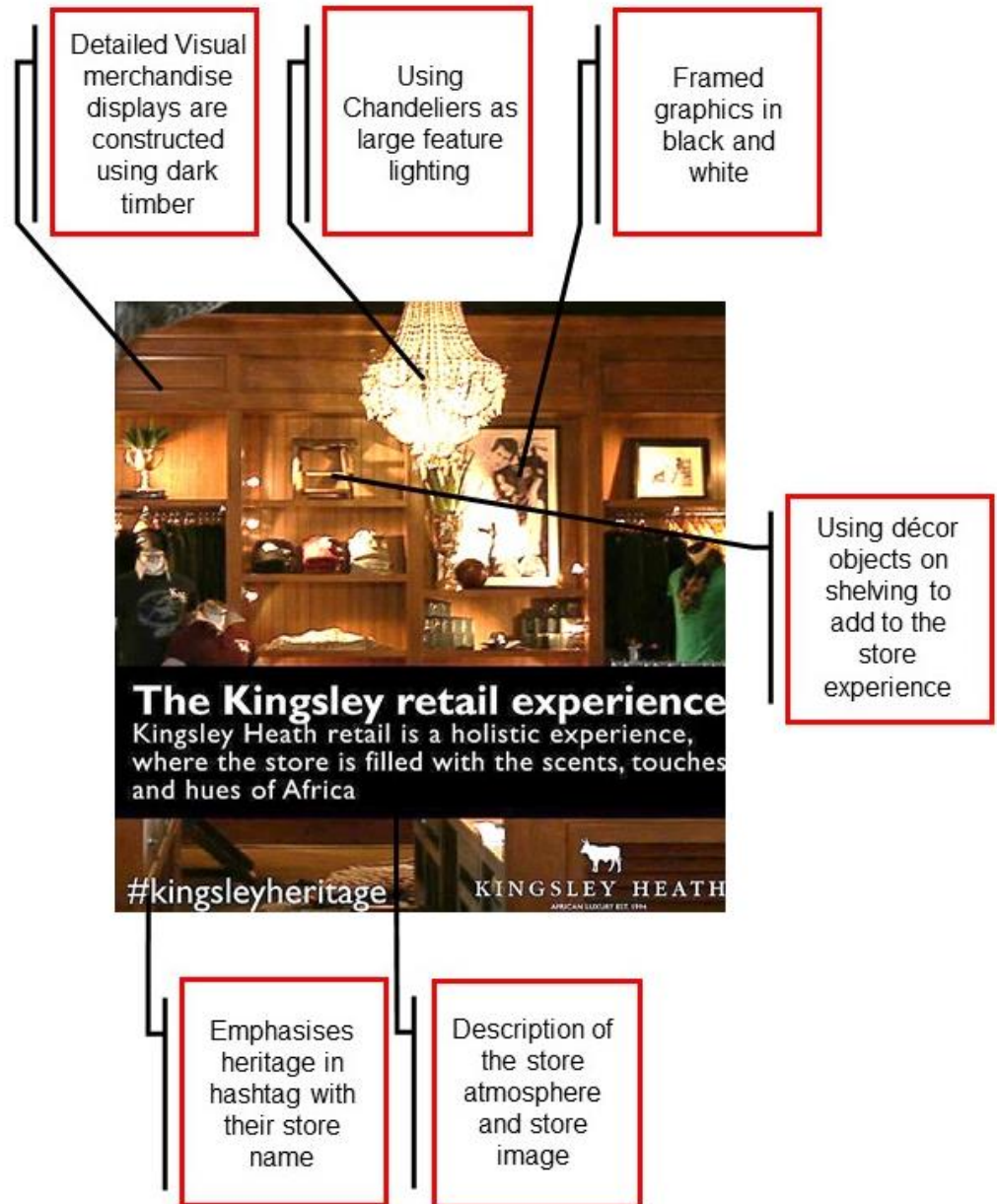
Figure 4.15: Store C: Store Atmosphere at Canal Walk Mall, Century City, Cape Town.

(Facebook, 2015)

4.1.2.3 AIR QUALITY and SMELL

Middle LSM Store B and D

Personal Observations

I was welcomed by a gust of warm air as I entered the insufficiently ventilated Store D. The lighting in Store D was not flattering or comfortable, as large amounts of artificial light was utilised in the footwear section. This created a stuffy, warm and uncomfortable shopping environment. The unpleasant odour experienced, increased as more

customers entered the store. The clothing itself had a particular factory smell, freshly packed out of their storage boxes. Store B has no particular odour and was well-ventilated, providing good air quality. One's senses were heightened in each retail store environment; as bad odours could deter you from entering or staying in the store environment.

Focus Group Observations

The smell and air quality within Store D were described as many things. Participant 3 felt that the air quality was bad as the store was stuffy and warm. Participant 5 smelled food. Participant 4 smelled detergent cleaner and Participant 1 smelled chemicals, warehouse boxes and plastic pellets out of a factory. All of which were not pleasant to participants. It was noted by Participant 3 that Store B was well ventilated, fresher in smell and provided better air circulation throughout the space. Participant 2 smelled a particular fragrance and Participant 4 felt that the odour came predominantly from the merchandise.

High LSM Store A and C

Personal Observations

Store C was more successful in creating a holistic store atmosphere as it came through strongly in the store's aroma. Their unique store fragrance was greatly promoted through this technique. Their unisex fragrance was the scent that filled the air within the store (Refer to Figure 4.16). The aroma was quite strong as it encompassed the entire store and the distinct smell was already met when walking pass Store C. Their unisex, male and female fragrance was displayed by their point of sales as an impulse buy. There no particular aroma that was consistent throughout Store A. They had many perfumes on display in each merchandise area which could be smelled in the female, male and kids' section. They also displayed smaller perfume bottles as impulse buys by the point of sales, which attracted customers due to the aroma. The perfume as a good marketing technique, had a distinct aroma which promoted their products. The aroma in store was unique to the store brand. No other store would be able to utilise the same aroma as it is specific to their brand identity.

Focus Group Observations

When passing through the ladies' department in Store A, Participant 2 recognised the smell of ladies' perfume but it disappeared when walking into the men's and kid's section. Participants 3 and 4 hinted at a slight fragrance in Store A but both were not sure what it could have been exactly. Participant 2 characterised Store C as a store he would not usually enter. Participant 4 had never heard of the store before and visited it

for the first time. Yet, both agreed that the smell grabbed them the very first time they walked into the store. Participant 4 enquired about the type of perfume used as it was so appealing. The technique that they used was expressed as clever because the moment you walked into that store you got a sense of opulence. Participant 1 and 2 also noted a strong timber and rich leather scent which enhanced the richness of Store C. Participant 3 described the scent as bush and sunsets.

Public Domain

Store C signature fragrance

Male and female scent

What is the Kingsley fragrance?
"Irozi", our unique ladies fragrance, is the zulu word for rose as depicted in the ladies bottle cap beaded by local Kwazulu Natal ladies in SA. "Maverick" our mens fragrance is a term used for an unbranded calf or cattle. This is a fresh scent for the modern man.

#kingsleyheritage   KINGSLEY HEATH

Beading on cap of perfume bottles

The perfume bottles are the same shape, colour and finish but still unique

Figure 4.16: Store C's signature fragrances promoted in store.

(Facebook, 2015)

4.1.2.4 HEAR

Middle LSM Store B and D

Personal Observations

The music played in Store D was appropriate for their young target market; it played from their local radio station. The music was quite loud and overbearing. Music played in Store B's background was very vibrant, current and popular, also well linked to their young target market. The timber floor finish utilised in Store B and D created noise when walking on it as it was not solid timber flooring.

Focus Group Observations

According to the comments made, sound definitely played a part and added to the atmosphere in each store. The music in Store D was expressed by Participant 1 and 4 as disturbing; not to everyone's taste, with volume increasingly louder than at the other stores. It did not promote a calming environment for the shopper according to Participant 1. Participant 1 classified herself as a person sensitive to music. Therefore, the loud music deterred her.

Participant 4 (2017) said: *"Store D was a bit louder; it was a bit more in your face. I don't know if that was intentional or not because, so is their display. It boom! It's here, if they have something it's in your face and you are supposed to see it and it's loud and it's proud."*

Participant 3 described the music playing in Store D as hip-hop street music which appealed to 10 to 25-year olds. Participant 5 mentioned that the music played from Store D's radio station, including advertising broadcasts, and announcements to staff personnel.

Store B played music at a lesser volume but their stores music appealed more to Participant 4. She classified it as a difference in age group, and tied the type of music played to the style of clothing sold within in the store, which appealed to a younger market. Participant 1 noted that the music related to the environment but was still loud enough to attract passers-by. The general atmosphere that the music created in Store B was enjoyed by all participants.

Participant 4 (2017) said: *"It just added to the atmosphere and to the clothes and the interior. That to me also speaks of up and coming late 20s early 30s. Those type of*

people would normally go shop at Store B because they want to be trendy. They want to be up to date and the music that was played in the store for me added to that."

High LSM Store A and C

Personal Observations

There was music vibrantly playing in the background in Store C, which created a comfortable relaxing atmosphere. Music was current and loud which drew you into the store. It was a pleasure to be greeted immediately by friendly staff members and offered immediate assistance. I was told about the specials currently taking place within the store for both male and female merchandise. There was music playing in Store A, but not as loud as Store C. It was hardly noticeable in Store A.

Focus Group Observations

Participant 1 did not recall any music playing in Store A, mentioning that it was subtle. It did however not feel like you were walking into an empty space. It was described as white noise. Participant 2, 3 and 4 agreed that they did not hear or recall hearing any music at all in Store A. Participant 4 (2017) said: *"With Store A there definitely was something, but the interior played on the whole minimalism aspect so they won't play something loud. They try to get you into the space and to find your way but it's for you to kind of explore what you can get there."* Store C was described by Participant 1 as the store that did not need music as it had the diffuser expressing a strong perfume aroma. Participant 1(2017) said: *"With Store C you already had this whiff of perfume; you did not need the music with it"*

4.1.2.5 TOUCH/FEEL

Middle LSM Store B and D

Personal Observations

It was often unbearable in Store D due to the number of customers within the small store. Store D became awfully crowded towards the back of store, which became quite difficult to access their merchandise. It was claustrophobic and overwhelming when trying to browse within the footwear merchandise section. There was insufficient space to stand and engage with the large selection of female footwear. Patience was required to search for your shoe size whilst surrounded by an abundance of visual merchandising display stands and customers. The finishes utilised in Store D were standard and low cost in type. Steel and timber repeatedly used throughout the store.

Store B provided a touch and feel experience due to the variety of finishes used and the different ways in which it was integrated in each merchandise section. The "Body" section was feminine and bright through the use of white, light timbers and feminine pinks. The kids' section was more playful and inviting, adding blues and greens to visual merchandising units. The men's section had darker, exposed finishes such as concrete flooring, raw timbers and steel which created a masculine feel.

Focus Group Observations

Participant 2 described that Store B incorporated both soft and hard surfaces. This added a sense of comfort and created a general soft feel to the store. The soft materials added to the store design, which created a pleasant atmosphere. Store D was well lit with certain elements highlighted using spotlights. This created a dynamic on how the merchandise was represented with all clothing accessible to touch.

High LSM Store A and C

Personal Observations

Both stores created a strong presence and unique identity through their choices of materiality. Store A promoted a stylistic international fashion runway image, due to the large amounts of white finishes utilised in the space. It became quite clinical in its abundance of white, as it was cold to the touch and plain to the eye. It had a very polished, clean and uncluttered feel, ultimately relying on the merchandise to showcase its beauty rather than the store itself. Fashion became the focal point within the store; interaction with the apparel was promoted. Store C blended their store finishes and fittings with their merchandise to create a feeling of warmth, comfort and enclosure. Great attention to detail revealed itself through their apparel and joinery. The store interior promoted a prominently masculine emphasised brand, due to the use of strong and dark finishes. Rich, dark timbers, leathers, steel and bespoke elements were consistently utilised throughout the store. There were also props on display to engage with such as camper beds, rugby balls and woven baskets, which brought more layers and textures to the stores image.

Focus Group Observations

Participant 1 noted that everything in Store C felt authentic to the touch and visual texture was utilised to emphasise the sensory experience. Participant 2 and 3 noted that the comfortable leather on the seats invited you to touch and engage with it. Participant 4 noted the woody texture of the display units and the plush carpets. The type of material quality utilised in Store C was definitely not something that could be compared to a low-income store.

Participant 3 (2017) gave the most descriptive response regarding the touch and feel of Store A and C and the atmosphere created.

For me Store C was really wonderful because your senses were stimulated just by the merchandising units alone because you had textured timber, then you had plush leather chairs and you have the Zebra skin. All those things added such richness to the experience, whereas Store A is kind of a canvas. Which is good in terms of retail psychology as well it's just a different approach. But it's a blank canvas, the canvas isn't the thing that's important, it's what is on the canvas that is important. Whereas, Store C actually took the opposite approach. If you think about it the shop was very dark so it was the joinery and the interior that took main focus. You really had to take the garments out of the cupboard space to appreciate them and enjoy them. From a texture point of view and a touch point of view I thought Store C offered a greater richness.

4.2   Convenience

4.2.1   Shopping Ease

A store experience was described with regard to convenience and shopping ease which encompassed ease to find merchandise, store accessibility, store familiarity and the convenience of facilities such as the point of sales, fitting rooms and rest areas.

4.2.1.1 EASY TO FIND MERCHANDISE

Middle LSM Store B and D

Personal Observations

Store D catered for men's and women's apparel, however there was no kid's clothing range within the V&A Waterfront store. Other outlets visited, such as at the Canal Walk Mall branch, had a larger variety of merchandise in a larger store location for greater shopping variety and ease. There was no specific order or structure to the type of merchandise grouped within the merchandise sections developed within Store D. Store D attempted to place rails next door one another to group merchandise due to the abundance of it in the small space (Refer to Figure 4.18). Store D overloaded rails with garments, which often fell onto the floor while looking for one's size. Only the shoes and accessories were grouped well but accessibility around these areas were limited due to inadequate floor space. Store B was a much larger store, which allowed for an easier flow in formation and groupings of merchandise. The amount of merchandise

became overwhelming but Store B divided their merchandise clearly into different sections. Store B's signage made it easier to find what you were searching for. In most cases, merchandise was grouped according to type rather than style e.g. T-shirts and tank tops in one area with shorts and jean selection close by (Refer to Figure 4.17).

Focus Group Observations

When the question was posed with regard to ease of finding merchandise in Store D, participants had varied opinions. Participant 1 had a completely awful experience searching for merchandise on the disorganised visual merchandising displays. The signage utilised was found to have provided minimal assistance. Participant 3 expressed an opposing view that Store D's merchandise was relatively easy to find because signage was clear. For e.g. "denim" white letters on black background which stood out. Participant 2 agreed, and added that their store image colour; red, was visible in all Store D's price ticketing and sale indicators. This assisted the customer, as you could see the pricing from a distance (Refer to Figure 4.18).

Store B had advertising boards and signage immediately as you entered the store. The signage was big and bold, simple but very effective. As one walked through the store there was constant highlighting of the type, style and cost of the merchandise item. This was most appreciated by Participant 4. A particular attribute of Store B, noticed by Participant 2 was the use of physical merchandise as part of the visual display. There were less block graphics or illuminated graphics in store, they utilised physical merchandise to communicate the products housed within that particular area. Participant 3 agreed that merchandise in Store B was easy to find. Participant 1 noticed that the accessibility to the merchandise in Store B was limited in some cases. Their visual merchandising display units utilised a mechanism to prevent visible cluttering on rails and prevent clothing from falling off. Participant 3 observed that minimal information was provided to customers in high income stores versus middle income stores.

Hanging rails are overloaded with merchandise, that it is difficult to even see the display unit

Cheap plastic hangers used

Merchandise has been grouped according to type e.g. these are all various types of skirts

Figure 4.17: Store B: Ease of finding merchandise.

(V&A Waterfront, 2018a)

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Figure 4.18: Store D: Ease of finding merchandise.

(V&A Waterfront, 2018b)
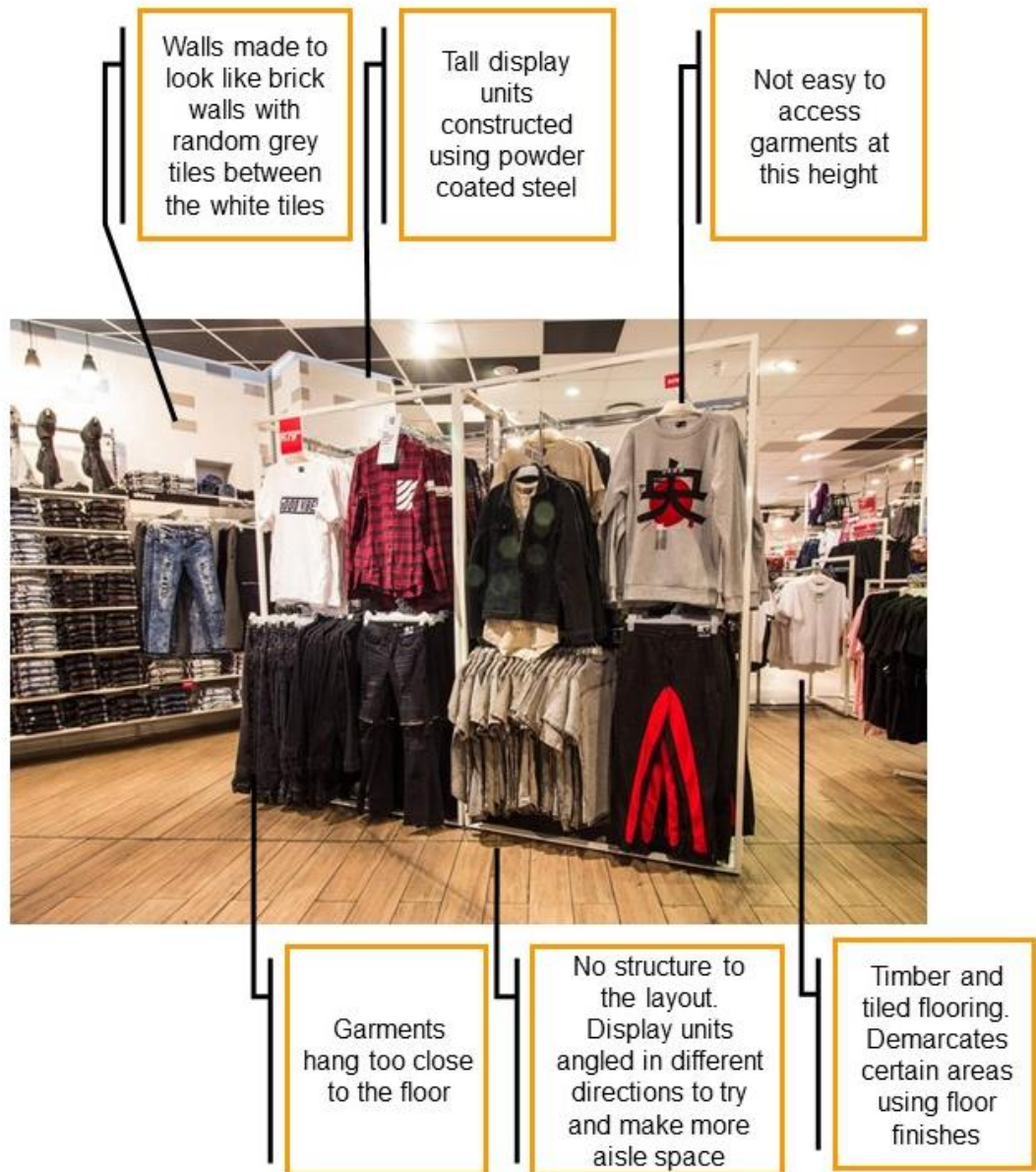
Figure 4.19: Store D: Ease of finding merchandise.

(V&A Waterfront, 2018b)

High LSM Store A and C

Personal Observations

Store A had a much larger store size than Store C. Despite the size differences, both store layouts were organised and well-structured in order to obtain merchandise easily (Refer to Figure 4.20). Store A allowed for more variety and style for both male and female merchandise. Store A catered for kid's apparel and Store C did not. Customers would be required to spend more time in Store A due to the sheer size of the store. Merchandise was grouped well due to the positioning and design of displays in U shaped bays. Apparel was matched to entice customers to buy more than one item such as a pair of jeans paired with a top and shoes. This created a wardrobe solution.

Store C was smaller in size and offered a limited variety of merchandise. The store layout was well structured, divided into female merchandise on the right-hand side and male merchandise on the left-hand side of store. Assistance was given immediately as you entered the store by sales personnel. Apparel on display was mostly folded, which made it difficult to view each garment. One would require to unravel the neatly folded garment to view it. The sales personnel helped during this process.

Focus Group Observations

Store A was classified as minimalist; with no signage or graphics present. Only the garment tag was available for information about the product. Participant 1 identified that the merchandise arranged in bays gave the shopper the illusion of privacy to view the clothing in peace. At the same time viewing of other items in the next bay was limited. The shopper would be required to spend more time in each bay to find what they are looking for (Refer to Figure 4.67). Participant 2 described that each bay created a wardrobe solution. Store A displayed a pair of shoes, a jacket, pants or shirts all together, which gave the customer an idea of how the items could be worn (Refer to Figure 4.67)

Participant 2 (2017) said: *"When you get there, they have shoes at the bottom, which matches the shirt and then the jacket and you almost see it immediately that this is what you can put together. That has been taken through consistently through the different lifestyles if I can put it that way. If you are looking at your formal items, you have exactly the same thing. You have a formal shoe, formal pants, formal shirt and its close by the accessories with your tie and everything. Same as casual, your sneakers, and jeans and so on and that actually stood out for me for Store A."*

Participant 3 identified that the displays were not densely packed which allowed for ease in finding merchandise (Refer to Figure 4.67). The large mirrors utilised between the merchandising units for shopping ease and comfort, were highlighted by Participant 3. Participant 5 referred to the ease of layout due to the clearly divided male, female and children merchandise sections in store.

With regard to merchandise convenience for Store C, Participant 2 mentioned that it would be an added benefit if they could separate the items by utilisation of graphics for a visual store experience. Customers were not able to view the merchandise from the front as hanging garments faced sideways. Majority of the merchandise were flat packed which provided limited access for viewing garments. One was not adequately able to fold the t-shirts back into its original form.

Participant 1 noted that the shopping experience within Store C was intentionally designed in a way that the shop assistant would be there to assist in providing information and refolding unpacked garments. The shop assistants purposefully and frequently asked customers if they required help. Assisting customers in finding the correct garment was incorporated in the shopping experience, rather than guiding and directing the customers with signs and graphics.

Participant 3 mentioned that one was found feeling less overwhelmed to find specific merchandise as Store C was comfortably smaller in size. The merchandise was not blatantly marked with big signs. Neither high LSM store required or chose to implement many lifestyle graphics or large bulky signs in store to sell items. The middle LSM stores relied on it to ensure quick sales occurrence, which in turn provided space for more stock. This topic sparked much debate during the focus group discussion. Participants 2, 3 and 4 appreciated the information provided about the apparel as it was clearly available and visible to customers in the middle LSM stores. All participants agreed that Store B's informative display and design approach was more successful in selling merchandise to customers.

The walls are all white and the merchandise is the only colour in the space. Making it easy to find merchandise

Signage in black letters, with serifs against the white wall to stand out. Guiding customers through space

Signage all above door height so it is clear to see

All units are well lit. Highlights merchandise.

Simple rest area ottoman benches- neutral base to match interior

Clear aisle space-easy to find direction within the store and locate merchandise

Mannequins are aligned and wear similar base of colours for seasonal garments

Well structured Floor layout. Units line the walls

Figure 4.20: Store A: Shopping Ease and Convenience.

(Graziadaily.co.za, 2012)

4.2.1.2 STORE ACCESSIBILITY

Middle LSM Store B and D

Personal Observations

Both stores could easily and conveniently be found in V&A Waterfront mall. The façade of Store B was easily spotted, due to the large, striking entrance which accommodated for high traffic into the store. There was no need to take an escalator or stairs to locate the stores as both were situated on the ground floor, in close proximity to the main

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entrance of the mall. ATMs could easily be found should cash be required to make a purchase. Store B conveniently catered for a wide target market, offering women's, men's and kids' apparel. Store D was easily spotted and accommodated for high traffic purposes due to their wide, large and corner entrance. Both stores include feature displays very close to the entrance way of their stores. Both middle LSM stores moved their feature displays closer to the stores entrance way. In so doing, a narrow aisle space was created for customers to walk through which limited access into Store B. Accessibility to merchandise in Store D was limited due to the display unit's height (Refer to Figure 4.19).

Focus Group Observations

According to Participant 3, the cluttered space provided by Store D, hindered the ease of accessibility throughout the store. It was perceived that shopping ease and accessibility was only sufficient enough for the necessary. Participant 1 noted the accessibility of the middle LSM stores point of sales. Security was considered a great concern for Store B's openly displayed point of sales, which enabled a fully accessible passage way to the public. The untidy storage area was fully visible behind the point sales. Store D was more organised when addressing the security, positioning and design of their point of sale.

High LSM Store A and C

Personal Observations

Store A was easily spotted due to the large bright entrance and luring window displays which encompassed the store. ATM's, escalators and a staircase were closely situated by Store A. Information boards are located frequently throughout both malls to locate the store easily if lost. In comparison, Store C has a smaller entrance with darker finishes utilised within their window displays. However, the music and aroma easily lure passers-by into Store C. Store C is situated in close proximity to facilities such as toilets and escalators.

Focus Group Observations

Participant 3 commented positively about Store A being recognised as most accessible store out of the four stores due to the large entrance door way and spaciousness provided throughout the store. Participant 4 described Store C size to be quite small compared to the other store examples but sees this as intentional because of the exclusivity that the store conveys through the store design.

4.2.1.3 STORE FAMILIARITY

Middle LSM Store B and D

Personal Observations

Store D was a small sized store making it easier to familiarise oneself with the store layout. Merchandise could be overlooked due to amount of apparel and visual merchandising displays in Store D. Store D, a well-known South African brand store recently became internationally recognised, therefore its location in a tourist mall was seen as a strategic move to assist store growth. This particular store was smaller in size compared to other outlets visited. Shoppers who are familiar with the brand would recognise that this particular store had no kids clothing range. More time would be required to familiarise yourself with Store B as it is larger in size, thus able to accommodate for more merchandise and facilities to experience. Store B, a well-known Australian brand, made it visible through signage that they internationally and locally recognised. They listed various countries through wall lit up signage. Store B and D are neighbours within V&A Waterfront mall, providing healthy competition.

Focus Group Observations

When it came to familiarity of the stores, there was much surprise that V&A Waterfront centre management allowed Store B and Store D, who are very close in target market, to open up right next door to each other. It was seen by Participant 3 as an offence to both store owners as customers would tend to make comparisons. Participant 2 had a difference in opinion. He mentioned that they were placed next door one another to create healthy competition, in order to bring more customers to these stores. Participant 2 (2017) said *"It needs to happen that way"*. It brings customers to one location but it is the customer's decision to choose which store they prefer. He mentioned that perhaps one store would have the little black dress they had hoped to find but the other store might not. Participant 3 felt that Store D's customers would more likely visit should they require more value for money, whereas Store B felt the most comfortable and welcoming.

High LSM Store A and C

Personal Observations

Store A, an International brand is already well renowned in its name. Store A was familiar due to their supply chain, their in-store merchandise was changed weekly. This provided exclusivity to the customer as they did not sell many of the same type of garment. Only those who shop at Store A would be familiar with the garments exclusivity as it is not advertised in store. Store C had stores in Dubai and South Africa.

There was only one of its kind in Cape Town, which contributed to exclusivity of their luxury brand. Their presence was acknowledged as a South African based brand, that promoted African luxury.

Focus Group Observations

Participant 3 expressed that Store A did not feel familiar but rather clinical in layout and structure. Participant 4 noted that the design of Store A was minimal with simply the name on the façade. Participant 4 doesn't usually shop at Store A so the store was unfamiliar. Her assumption was that the store was extremely high end and not affordable. Participant 1 mentioned that the several flat packed clothing items in Store C made one reminiscent of the age of shops where the assistant was the only one accessing the display. Participant 1 (2017) said: *"It's almost unthinkable to help oneself in this environment."* Participant 2 expressed that everything in Store C was consistent but lifestyle graphics could have provided more clarity as to which lifestyle was sold within which merchandise section. Participant 4 mentioned that customers would visit Store C for the brand, that informed local and sophisticated style and taste, lending itself towards luxury. Participant 3 expressed that an explorer-type feel was provided.

4.2.2 Convenience of facilities

The convenience of the facilities provided in each store was described below according to the point of sales, fitting rooms and rest areas.

4.2.2.1 CONVENIENCE OF POINT OF SALES

Middle LSM Store B and D

Personal Observations

Each middle LSM store housed one point of sales. It was easy to locate and large enough to accommodate for high traffic in both stores. Store D's facilities are placed within close proximity to one another. It became crowded in these areas i.e. customers who waited in line at the point of sales clashed with the queue of customers at the fitting rooms. It was warm and uncomfortable due to the lighting installed within the bulkhead over the point of sales. Both stores' point of sales was long and large enough to accommodate for 7 till points; this helped to assist customers swiftly. A queue management system helped to regulate and direct high traffic flow in both stores. Store B's point of sales was centrally placed for easy access, and situated close by discounted merchandise and impulse buys to lure customers to purchase more items.

Store D at the V&A Waterfront offered a new and simpler digital payment system, whereby customers who had less items could pay separately by card at a smaller pay point. This created a shorter queue at the point of sales. Store B and Store D's point of sales was very similar in shape, colour and overall design. Sale items and impulse buys had been strategically placed close by the point of sales in Store B and recently within Store D. Store D provided sufficient, secure and lockable storage behind the point of sales whereas Store B did not adequately provide a storage system suitable for both staff belongings or customer packages.

Focus Group Observations

The point of sales at Store D was perceived to be quite standard in its design approach. Participant 1 described the point of sales as one long, flat counter with integrated touch screen computers, completely clear of clutter to create a basic shopping experience. According to Participant 1, it did not entice customers to spend extra time in the store. Participant 4 noted a rectangular, robust yet simple shaped point of sales. Participant 3 noted that lockable cupboard space was provided behind the point of sales as well as a microphone made available for announcements. The lockable storage space provided convenience to store items such as garments, shopper bags, wrapping paper, hangers as well as staff personal belongings (Refer to Figure 4.21). Ample space was provided to accommodate for high sales traffic, as there were 7 pay-point systems to utilise.

Participant 3 and 4 noted that Store B also accommodated for 7 payment point systems utilising the same integrated touch screens. Participant 1 noted that their till points were quite cluttered with impulse-buy items embedded within a display in the front of their point of sales counter. Participant 3 observed the merchandising displayed on either side of the designated queuing area for impulse buying, with large illuminated signage displayed behind the point of sales to draw customers to that area.

It was found by Participant 3 that both Store D and Store B spoke a very similar language in the way their point of sales were designed. In fact, Store D's point of sales was almost identical to the one at Store B. Participant 1 identified that Store D was more successful in addressing their storage facility provided behind the point of sales. Store B's storage facility was easy to access, from a security perspective, and looked cluttered and disorganised.

A convenience aspect that was acknowledged by Participant 2 was that neither Store B nor Store D had a ledge included by their point of sales. Participant 2 (2017) said: *"If*

you are a lady, you are actually shopping with your bag and ladies would look for stuff whilst they are right at the till" A woman requires a ledge to look for something her handbag; and another platform should be provided to a make payment. The pay point in Store D and B sits flush with the counter, with no variation in height. The rest of the participants strongly agreed with this statement as it tied in well with the comfort and ease in design. They acknowledged that they did not critically analyse the point of sales. Another level or platform at the point of sales would provide a more comfortable paying experience, specifically for female shoppers.

Public Domain

Figure 4.21: Store D Point of sales.

(Proome, 2014)

High LSM Store A and C

Personal Observations

Store A provided more facilities than Store C as each merchandise section within Store A housed its own point of sales. There was a point of sales positioned in the female, male and kid's merchandise department, each differed in size but not design style. Queueing at the point of sales in the female merchandise section was lengthy due to high traffic during busy periods. When this occurred, store assistants would approach customers at the female sections point of sales and asked them to move to another point of sales to be assisted quickly. This was a positive approach to good customer service. It indicated that despite the inclusion of three point of sales, the point of sales in the female section continued to be utilised more often than the other two. The well-hidden, simplistic storage cupboards was sufficient for staff belongings; store bags and customer packages situated behind the point of sales. The main point of sales in the female section was long, large, had white panels, a silver counter top and aluminium skirting. The back of the counter had a black, gloss finished wall with lit up brand signage. A column protruded out of the point of sales at one end, taking up a portion of the workspace.

Store C only provided one point of sales, sufficient for the small sized store. It was easily seen as you entered the store, centrally placed at the back of the store with the store room access door beside it. A wide central path was created, leading customers directly to the pay point. Positioned close by the point of sales was a glass display cabinet with perfume fragrances displayed inside. A perfume tray display was placed on the point of sales counter to entice customers, encouraged by the store's aroma. The point of sale itself was very detailed in design. Behind the point of sales counter stood a bespoke joinery unit designed with cupboard, drawer and shelve storage for the store assistant's convenience. It also acted as an extra work surface. There were 4 drawers and two cupboards, the 2 middle sections had slots for shopping bags to fit within. Dark hardwood was used to construct the point of sales, with two detailed ventilation panels and skirting mouldings. The till point was more traditional than Store A's due to the store design intended to portray their store image. The store logo of the Nguni, which is an African symbol of wealth and prosperity is emphasised on the wall behind the point of sales.

Focus Group Observations

Store A's point of sale was considered to be stylish and plain by Participant 1. Participant 3 and 4 enjoyed the several point of sale areas available. A point of sales was located in the men, women and kids' section which offered a comfort to the buying

experience in being able to pay in different areas. The span of the point of sales was long, rectangular with simple finishes (Refer to Figure 4.22).

Participant 3 (2017) said: *"Most people go to the main area which is kind of in the ladies' section but I've been there before where it has been so queued up that they say why don't you go pay by the children's section? Or you could even go pay in the men's section. And that really offers comfort to the buying experience, the fact that you can go to different areas to pay."*

Participant 1 noticed that the point of sales at Store C was manned by the shop assistant. The small point of sales only accommodated for two sales points. Participant 1 and 3 described that it was made up of solid timber with detailed mouldings and a louvered timber front. Behind the point of sales was a buffalo associated with their brand. Storage was also provided behind Store C's point of sales but detailed to match the point of sales design approach (Refer to Figure 4.23). Both Participants 4 and 5 noted that it could easily be spotted from the entrance of the store, placed at the back of the store with signage on the back wall. It allowed that a single staff member on duty could manage and monitor the store, the point of sales and fitting rooms, for security purposes. The placement of mirrors on their display units also reflected one's surroundings in that area. Participant 1 conveyed that all areas in Store C are full of detailing and carefully selected items to create a beautiful space (Refer to Figure 4.24).

In comparison to the middle LSM stores, large amounts of merchandise cluttered Store D thus a single person would not be able to manage the store from one area. The fitting rooms and point of sales were separate, thus requiring additional staff to man the different areas. Participant 1 (2017) mentioned that: *"You need definite point of sales people and definite fitting room people and definite floor people."*

The black backdrop has built in storage cupboards which are well hidden

Store signage in white behind point of sales, with black gloss backdrop

2 Large Lit up graphics behind Point of sales

ZARA

Simple finishes, White rectangular point of sales with black top and plinth/kickplate

Queuing system to direct queuing traffic to POS

Figure 4.22: Store A Convenience of Point of sales.

(Mlbarch, 2013)
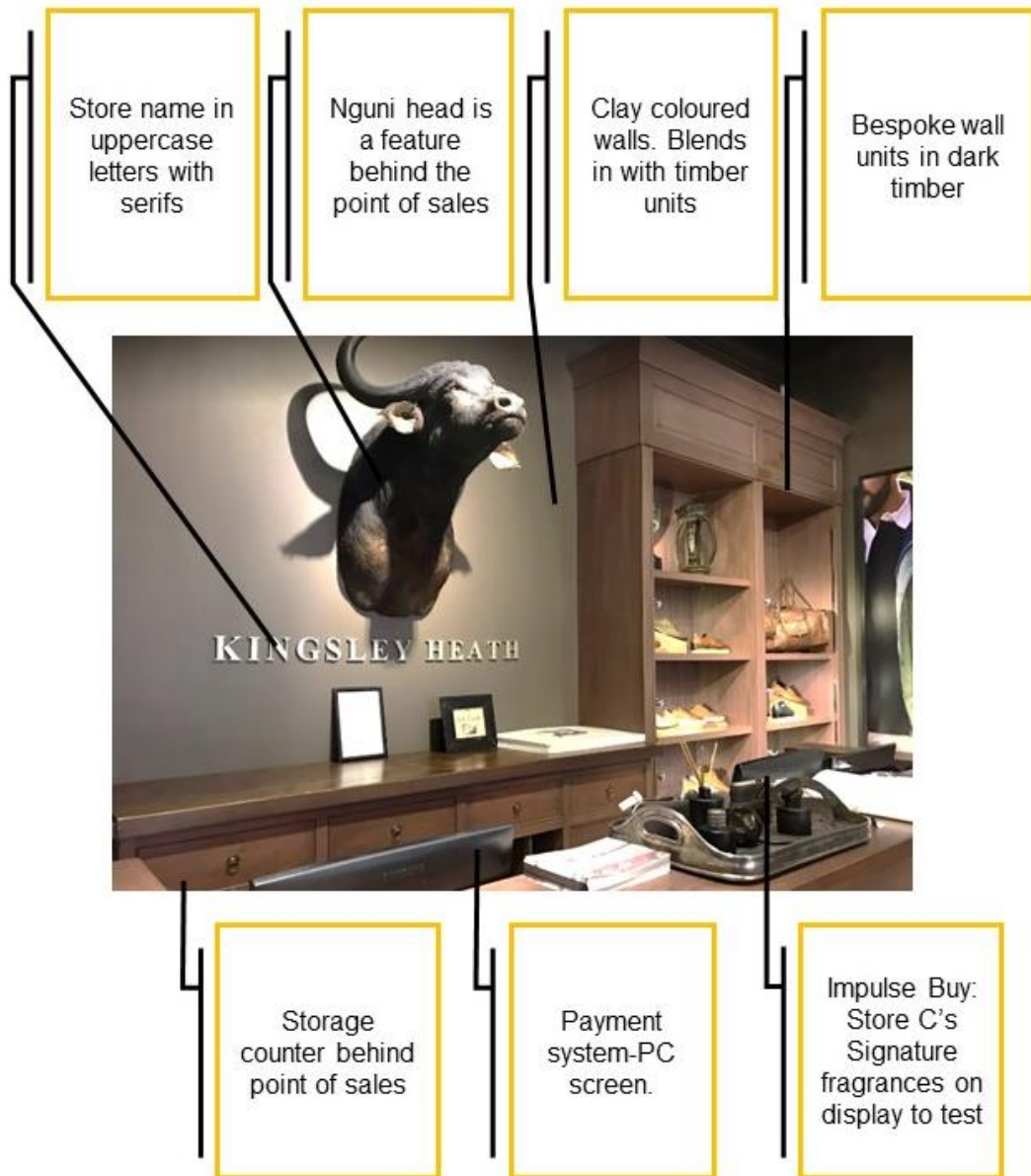
Figure 4.23: Store C Point of sales.

(Google maps, 2017a)
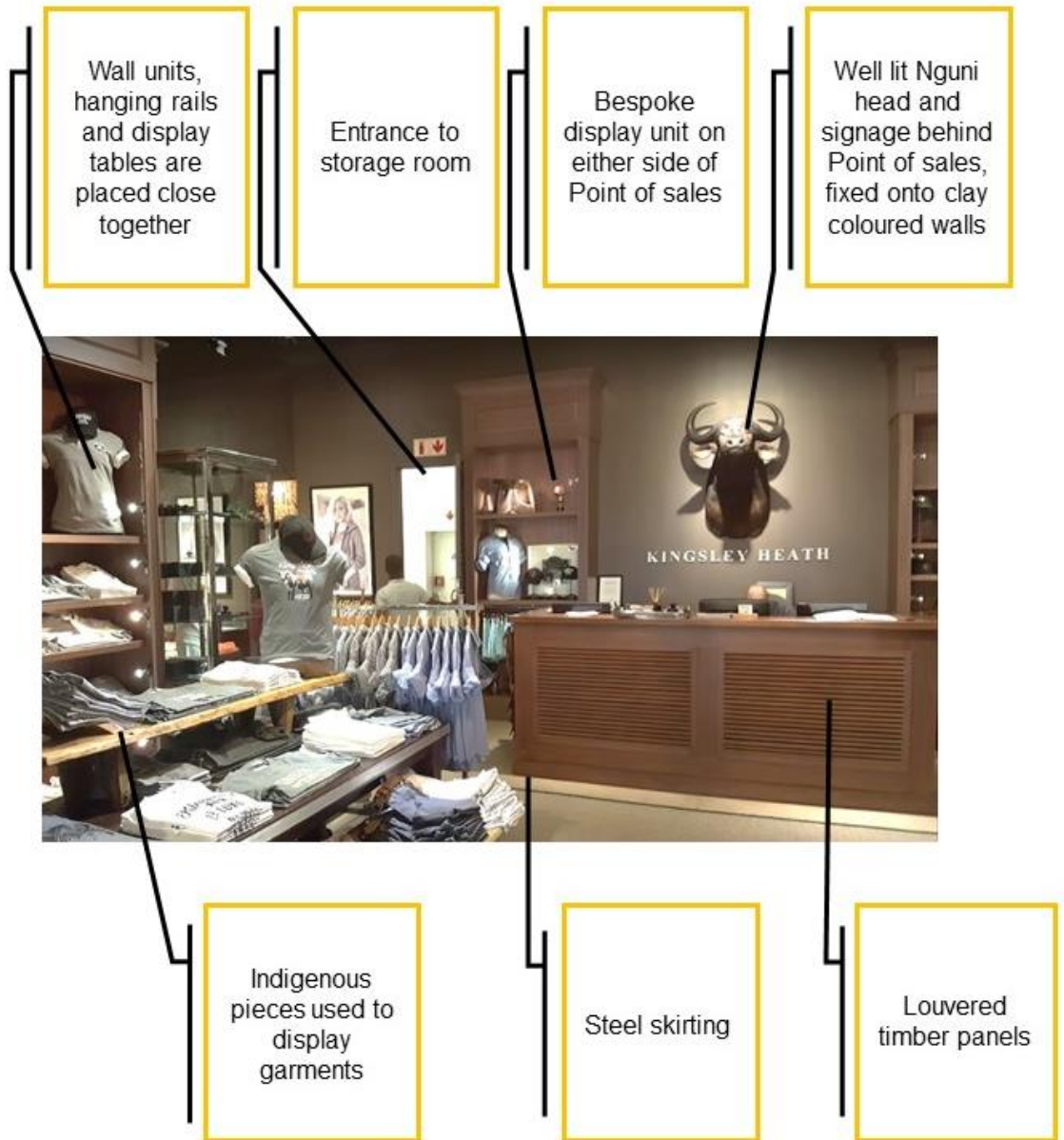
Figure 4.24: Store C Convenience of point of sales.

(Google maps, 2018b)

4.2.2.2 FITTING ROOMS

Middle LSM Store B and D

Personal Observations

In Store D unisex fitting rooms are located towards the back of the store, with close proximity to the point of sales. It was easy from a security perspective to keep a watchful eye over store facilities, due to their close proximity to one another. The cubicles were spacious enough in size for two people, however the number of cubicles were limited during high traffic periods.

There was a balance of facilities in Store B. The male fitting rooms were situated close by the male merchandise. The female fitting rooms were situated in the female "Body" section (sleepwear, active wear and undergarments). The female fitting rooms were quite hidden; one could not easily spot the signage. Fitting room signage did not specify gender as each sign only said *"try it on"*. A large number of fitting rooms are provided for females, rather than males. This substantiates that the female merchandise is more prominent, marketed and accommodated for than the males.

Focus Group Observations

Participant 4 mentioned that Store D's fitting rooms were located at the back of the store. Participant 1 described that Store D's fitting rooms included adequate lighting, seating and lockable stable doors. It was private and ergonomically comfortable. The seat placed inside the fitting room was large in comparison to the other stores. A mesh wire frame acting as a pegboard was included in the design of the fitting room. Participant 1 and 3 enjoyed the clever design that allowed for flexibility in hanging clothing. Participant 4 found the fittings and fixtures in the fitting rooms to be practical for use and Participant 3 found it to be low cost.

Participant 2 and 4 described that Store B's fitting rooms were positioned in the centre of the store for men and at the back of the store for females. Participant 4 mentioned that the fitting rooms were segregated. They did not explicitly mention whether it was male or female but placement suggested it. Participant 2 noted that there was less merchandising in the area closer to the fitting room which enabled easier traffic flow. Participant 1 described that the fitting rooms were spacious. Participant 2 noted that Store B paid more attention to detail than Store D as they implemented a particular timber loft style or theme as their design approach.

High LSM Store A and C

Personal Observations

There were a number of fitting rooms located within each merchandise section in Store A. They could be missed, if not indicated due to the large store size. Female fitting rooms were situated towards the back of the store, next door the point of sales. The fitting rooms were enclosed and could not be seen immediately from the outside. The inside of the fitting rooms was found to be simplistic and minimalist.

Store C had two spacious unisex fitting rooms situated next door the store room, positioned opposite the visual merchandising displays in the male section. The fitting rooms were uniquely designed to immolate comfort, elegance and style in the great

choice of luxuriously rich, dark yet masculine finishes and fittings. African luxury was exuded through the buttoned-down, upholstered brown leather couch placed inside, dark rich vintage brown walls and framed black and white graphic images on the walls. It was a large, comfortable fitting room which accommodated furniture, a large framed mirror, high ceilings, a chandelier and their signature Nguni logo on the wall behind the spacious leather couch.

Focus Group Observations

Participant 3 noted that Store A had large mirrors in each female fitting room and the circulation area. Participant 2 described that the female fitting rooms included a large lobby area with full height mirrors which created a memorable space and environment. Participant 3 gave an overview of the fitting rooms provided in each section. Each cubicle; 12 female, 4 male and 2 kids fitting rooms, only had dark grey curtains and no lockable doors for privacy. They were very simplistically designed with gypsum board walls and powder coated metal framing all round. Recessed shadow line skirting which indicated great minimalistic detailing.

Store C's fitting rooms were considered to be quite spacious and the design was enjoyed by participants. All but 1 participant enjoyed the design of Store C's fitting rooms. Participant 2 questioned the appropriateness and luxuriousness of it. Instead of a chair or stool, a couch was placed inside the fitting room.

Participant 2 (2017) said: *"You just want a small stool where you can sit on or just put your stuff on. I don't imagine myself sitting like this in a fitting room. You need to stand and you need to rotate and look at yourself in the mirror and then walk out of there."*

Participant 2 noted that the door heights of the two fitting rooms defined the fitting rooms and back spaces within the small store. There was a sense of volume from fixtures and fittings.

4.2.2.3 REST AREAS

Middle LSM Store B and D
Personal Observations

When initially visiting Store D there were no rest areas. When revisiting the store, changes were made which included a seating area. There was only 1 long, wide leather upholstered bench seat. It served as a rest area, waiting area and purpose area for trying on footwear outside the fitting room. There were various seating spaces available

in Store B, situated in the footwear section and in both the male and female fitting room areas (Refer to Figure 4.25).

Focus Group Observations

At the time that participants visited Store D, hardly any rest areas were incorporated. This gave a sense to Participant 1 and 2 that the main aim was to shop and pay rather than create a memorable shopping experience. Participant 2 expressed that the areas in Store D was standard depicting a low-end retail store. Participant 3 and 4 were the only participants who noted a seat in the shoe display area (Refer to Figure 4.25).

Participant 1 enjoyed the rest areas accommodated for in Store B as it showed consideration to cater for the whole family. Participant A3 particularly appreciated a well-placed rest area designed and placed in the ladies fitting room area. Participant 3 observed that there was a long linear bench, a glass screen and mirror attached; with letters printed on it in big and small sizes.

Participant 3 (2017) said: *"I thought to myself that this is so well placed. I remember going shopping with my mom when I was little and getting so highly bored and frustrated and you need that pause area. So, they allowed that pause areas outside the change room in that sort of central area within the change room where you can just sit and read a book or do whatever you needed to do to distract yourself while your mom is changing. So that was good."*
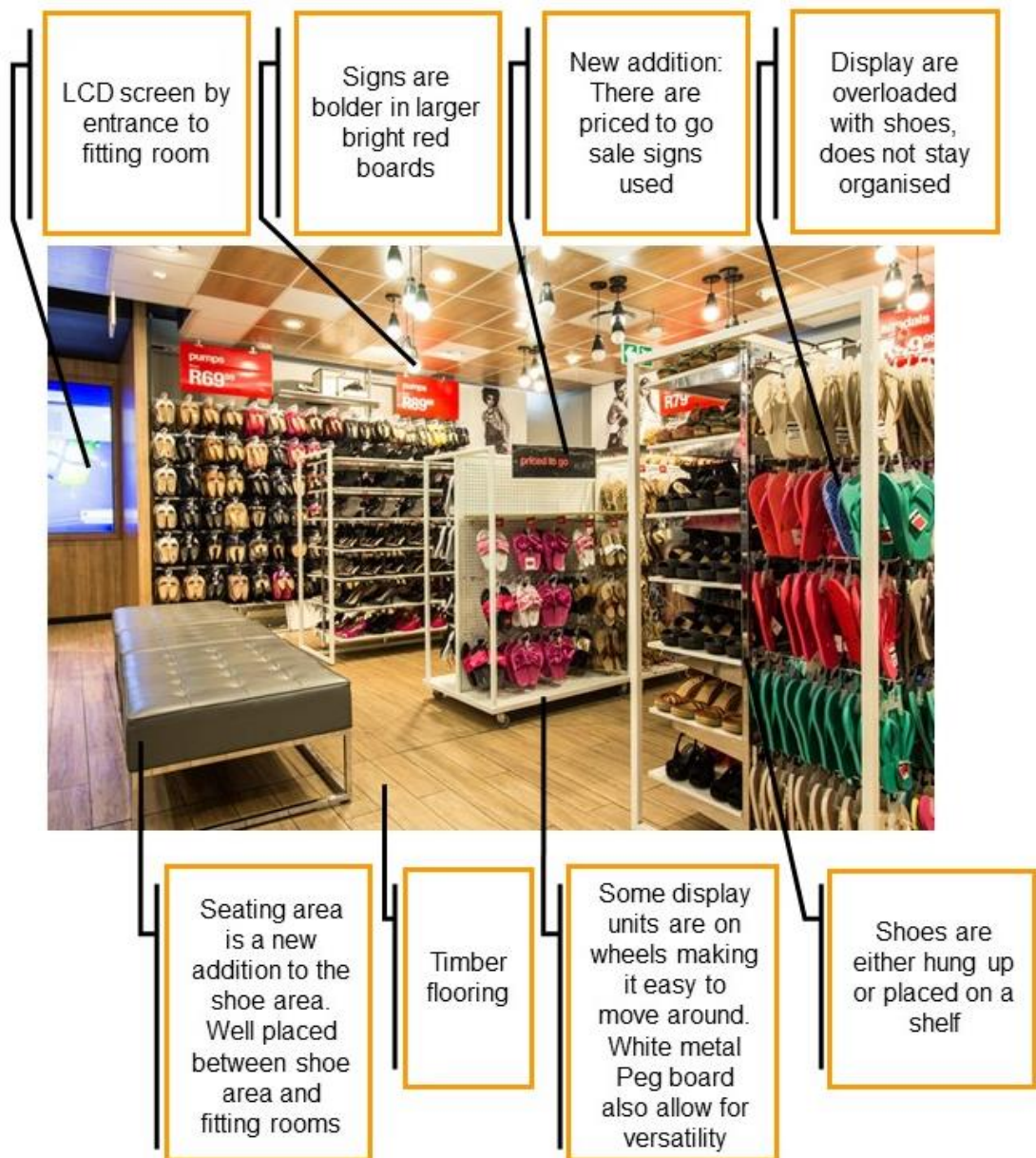
Figure 4.25: Store D: Convenience of rest area.

(V&A Waterfront, 2018b)

High LSM Store A and C

Personal Observations

A comfortable lounge seating space was situated close to the fitting rooms in Store C. It served as a waiting area outside the fitting rooms, for customers to enjoy the store aroma. The rest area of two single leather upholstered seats, a coffee table and table lamp were well curated to tie in with the rest of the store's unique design. Bench ottomans were placed next door columns as rest areas in Store A. These were simplistic and minimal in design, matching the store's image.

Focus Group Observations

Participant 3 and 4 noted rest areas situated around the columns in Store A. The seats were covered in white leather upholstery.

Participant 2 observed that Store C was not large is size thus would not require many rest areas. All participants noticed the rest area in Store C. This was the highlight within Store C as it complimented the store atmosphere and linked well to their store identity. Participant 1 and 4 noted that the rest area was luxurious with big plush high back chairs right outside the fitting rooms. This area contained carefully selected and detailed items which created a beautiful space. Participant 1 (2017) described: *"Almost like you should be sitting there with a glass of whiskey."*

4.3   Facilities

4.3.1   Store Layout

The store layout was described below in comparison to local and global brand stores categorised in the middle LSM and high LSM bracket in South Africa

4.3.1.1 AISLE PLACEMENT

Middle LSM Store B and D

Personal Observations

Upon entering Store D, one was welcomed by a visual merchandising display in the female section. The feature display was particularly interesting; drawing one towards it. The wall displays were organised at the beginning of exploring the store. Unfortunately, the organised layout did not continue throughout the store. Accessories and footwear displays seemed like an after-thought. It was cluttered, not well structured and influenced the circulation space. This area had since been improved, when visiting the store again in 2018. They reorganised the visual merchandising displays to provide clear aisle space. It did not allow for a trolley to pass through them, but it did allow for two customers to pass by one another with more comfort and ease.

More female merchandise was accommodated for than male merchandise. More than half of Store D's floor space was dedicated for female merchandise. Core displays for female merchandise were positioned centrally throughout the store. The point of sales positioning reduced the floor space and wall space allocation for male merchandise. There were unisex fitting rooms situated towards the back of the store. The entrance way into the fitting room area was narrow to control foot traffic, but provided discomfort.

Core displays were seen as one entered Store B, which indicated specials on offer. I viewed that this feature display had changed to a much larger display. It was moved closer to the entrance of the store, obstructing the path to enter the store. The various types of flooring utilised in the space easily directed customers through the aisles. The store aisles were wide enough to accommodate for two people passing by one another in most areas of the store. There was a central pathway that led customers into each section, which included the varied floor finishes to identify these spaces. The menswear was situated on the left-hand side and women's wear on the right.

Focus Group Observations

Store D had limited space in-between the merchandise walls and the floor equipment which was uncomfortable for Participant 2. Participant 1 agreed that insufficient space had been provided between aisles and thus allowed an insufficient viewing distance for merchandise. Participant 2 mentioned that the aisle spaces were heavily used for special feature displays and mannequin displays. Store D utilised a frame like black steel grid structure as aisle displays which utilised large amounts of aisle space.

Participant 2 and 4 agreed that Store B's aisles were adequately spaced for ease of circulation. Participant 1 interestingly noted that Store B offered kids clothing, however, they did not make the connection that parents with kids often have another trolley with another sibling in it or a pram. Many of these stores did not accommodate for that in their circulation space.

High LSM Store A and C

Personal Observations

Store A's large store size was ergonomically well-developed and spacious aisles could accommodate for people and trolleys. Trolleys could not be accommodated for in Store C as their aisles were narrow. The store's wide central path led customers directly to the point of sales. The uncluttered store layout in Store A created a catwalk in which the mannequins paraded the merchandise and the visual merchandising displays showed off the latest fashion.

Focus Group Observations

It was ironically noted by Participant 1 that Store A was not perceived to be a store that one would take their kids into. Store A was classified as the most spacious store, which included a kid's clothing range. Participant 2 noted that the customer was given freedom to navigate the space rather than enforce formal walkways throughout the store. Participant 4 and 5 described clear aisles that promoted ease of accessibility

throughout the design and use of the space. Participant 3 added that Store A's spaciousness could be associated with luxury.

Participant 3 (2017) mentioned: *"Spaciousness lends itself to that feeling of luxury. Very spacious spaces help give that feeling of luxury and that's true about Store A that is what they are aiming to do"*

The question was then prompted to ask focus group participants: *"Would you say that at the middle LSM stores, they are just too tight for you to take a pram?"* I received a humorous response from Participant 1 (2017) to the question posed: *"You can, but you have to have a very high tolerance level for pain."*

Participant 2, 3 and 4 noted that Store C's wide aisle placement led customers directly to the point of sales, which was the main feature area. Participant 2 found that the wide aisle space created limited space between the merchandise walls and the floor display; this caused discomfort. Participant 5 found it easy to move through all areas, as it was a small sized store.

4.3.1.2 SPACIOUSNESS

Middle LSM Store B and D

Personal Observations

Store D at the V&A Waterfront was much smaller in size in comparison to Store B situated right next door. Due to the limited space within Store D, the rails were overly cluttered, to the extent that clothing fell off their rails while looking for a particular size. Store B accommodated for more merchandise, due to the larger store size. Store B and Store D offered multiple clothing brand ranges. The smaller size and location of Store D led to the exclusion of their kid's clothing range. Limited space was provided for female accessories and sleepwear.

Focus Group Observations

When comparing the middle LSM stores, Participant 1 felt that Store D was more cluttered, and did not achieve the same spacious quality. The viewing distance between the clothing and the customer was too short and dense. One could not stand back and view the front hanging items from a distance. Participant 4 felt that it was fairly easy to obtain merchandise in Store D. In some areas, it became more difficult such as in the intimate wear section. The back of the store where the intimate wear

was situated appeared as an afterthought in terms of spatial quality for ease of movement.

Participant 1 identified that Store B was more successful with their front hanging items as one was able to view them from a distance, due to the height at which they were placed. Participant 2 noted that overall the areas within the store became cramped, but it was comfortable enough to shop within. Participant 4 described it as open and inviting, strengthened by the use of signage and displays. Despite the contrasting opinions between participants, Store B was described as more spacious than Store D.

High LSM Store A and C
Personal Observations
Both stores are well-structured. Store A's large store accommodated for male, female, kid's merchandise and a number of facilities; it was spaciously divided into 4 sections. A large female merchandise area encompassed the entire front half of the store. Store A accommodated for a number of displays, large entrance into the store for high traffic and facilities such as fitting rooms and point of sales within each department. There were clear and spacious aisles and access to merchandise. Store C was a small store, however accommodated spacious facilities. Facilities included a store room, point of sales and curated seating area situated outside the fitting rooms. There were spacious fitting rooms, large enough for a two-seater couch. There was a spacious central pathway leading to the point of sales. However, narrow space provided between merchandising units which restricted movement and high traffic circulation.

Focus Group Observations
The spaciousness of Store C was discussed at length due to Participant 1 disagreeing with the statement made about ease of movement around the narrow walkways. Participant 2 did not enjoy the narrow walkways leading to the merchandise. He noticed a wide aisle leading the customer to the point of sales. Participant 1's viewpoint was that Store C intentionally created narrow walkways by the merchandise area. That it was specifically designed to keep the customer away from the merchandise so that the shop assistants could leap in to help. This viewpoint was derived from how shops were run when shop-fitting first began. The shop assistant would assist by picking out your garment to the correct size asked for. The store was not designed for casual browsing; it was deliberately designed to create a significant shopping experience for the customer to be helped by the shop assistant. Participant 1 compared it to royalty.

Participant 1 (2017) said: *"It's like the King. The King would never touch the clothing; the tailor would come and put it on him. It goes with the whole show; it's basically a show that they have put up there for you. It's the experience."*

Participant 4 agreed with Participant 2 regarding the limited space between merchandise displays. It only allowed only one person to pass through. Participant 3 agreed with Participant 1 as the store was cosy yet quite spacious considering the size of the store.

This referred back to the point made by Participant 3 about Store A's aisle placement. Spaciousness for Store A became a form of luxury, thus creating a unique shopping experience. Participant 4 felt that there was no feeling of clutter within Store A. Participant 5 added that store areas were large in size, which allowed merchandise to be spread out evenly throughout the store.

4.3.1.3 LAYOUT

Middle LSM Store B and D

Personal Observations

Store B is large and rectangular in shape, with an extended square shaped area to the right-hand side of the store. Store B was a multi-branded mega concept store consisting of male merchandise ranging from footwear to sleepwear and accessories. Female merchandise ranged from footwear to sleepwear, undergarments, accessories and make-up. Kids clothing ranges and a newly introduced home ware range were included. All merchandise ranges showcased a mix of Store B's various group brands. The male merchandise was situated on left hand side of the store and female merchandise on the right-hand side of the store.

The central path of the store predominantly arranged with female merchandising displays extended to the point of sales. There was a sale section for all marked down items to entice customers before reaching the point of sales. The female undergarments and sleepwear were placed towards the back of the store opposite the point of sales. The kid's area was smaller but still well-structured; placed close by the till point. The female shoes, accessories and make-up were grouped together towards the end of the male merchandise area. The male merchandise and female footwear sections were separated by the male fitting rooms with the undergarments and sleepwear separated by the female fitting rooms.

The male fitting rooms were clear in its positioning as it was situated close by the male merchandise. The female fitting rooms were not seen clearly; it was hidden in a corner in the female merchandise section for undergarments and sleepwear. The amount of merchandise on display became overwhelming, however Store B divided their merchandise adequately into their different product brands to make it easier to find what one may be searching for.

Store D's layout was similar to that of Store B, with male merchandise situated on left hand side and female merchandise on the right-hand side of the store. There was more female merchandise than male, as a portion of the male sections floor space was utilised for the point of sales. Store D attempted to utilise varying floor finishes to demarcate certain areas in the store, however it did not indicate clear directive in the store layout. The signage by the point of sales, fitting rooms and highlighting the various store brands gave a clear directive of placement of facilities in store.

Focus Group Observations

With regard to the store layout of Store D, Participant 2 and 3 described that the menswear was situated on the left and women's wear on the right. The aisles were highlighted with display dominated by women's wear. Store B had menswear on the left-hand side and women on the right-hand side. In the centre to the left-hand side area, they had homeware; the middle, right-hand side had children's wear. At the very back, they had the body wear. It was felt by Participant 3 that they were almost following the same recipe, in terms of the layout as well as design. Only very slight measures of distinction separated the one concept from the other.

There was an overall agreement by participants that they enjoyed the layout structure of Store B. Participant 2 mentioned that Store B led you from a high-end lifestyle to a subtler lifestyle and eventually led you to a more intimate space where the undergarments were displayed at the back of the store. This was well placed to accommodate for male shoppers, as you were welcomed to shop on both sides. When you walked towards the back of the store the men would immediately see that they would not need to go to the female intimate's section. Participant 1 agreed that the layout was carefully considered, as a result it provided privacy for those looking for undergarments.

Participant 1 observed that male and female clothing was displayed in a manner that was in touch with the various gender roles in society. Both Participant 2 and 4 agreed that the placement of fitting rooms was also considered in the layout. Men have access

to fitting rooms closer to their section and women can access the fitting rooms at the back of the store by the intimates "Body" section.

The layout of Store D resonated with Participant 4 as this specific Store D paid more attention to detail with the different types of flooring that they had such as the floor detailing around the store entrance. She described the layout as a "*notch up*" to other outlets. Participant 4 noted that you could walk freely into Store D's space but Store B's ease of layout allowed for a better flow.

Participant 3 noted that Store B was more successful due to their spaciousness to walk into a well-developed free flowing layout. It was easy to navigate in Store B due to identifiable way the merchandise was displayed. Participant 2 agreed that through clever placement one already knew which spaces were demarcated for particular merchandise.

High LSM Store A and C

Personal Observations

In Store A, the male section was situated at the back, on the left-hand side of the store and the kids section situated at the back on the right-hand side of the store. U-shaped sections of displays have been designed to fill each display section within the store. Within the u-shaped displays were table displays for folded items. Footwear displays have not been designed. Instead, footwear was randomly displayed within the u-shaped displays with footwear placed on the lowered tier of the table displays. This had been purposefully incorporated in order to include footwear that matched with the range of merchandise on display; creating an outfit that customers could impulsively purchase.

Individual clothing rails stood on either side of the long table displays. Large, long mirrors were situated within each U-shaped visual merchandising configuration. The wide ends of the units were used to display accessories such as jewellery and scarves. Central to the store, in the female section, there were tall free-standing black painted steel rectangular hanging displays. These were placed beside one another in an organised sequence, some strategically placed by columns. The displays had white painted wooden boxes placed below.

The store layout of Store C was structured and organised within a small confined space. As one entered Store C the female merchandise was situated on the right-hand side and male merchandise on the left-hand side. The separation of the merchandise was

consistent throughout the store. There were two spacious unisex fitting rooms located within the male merchandise section. Mirrors were placed on the display units in the centre of the store. These display units separated the first and second half of the store. The store room was situated close to the point of sales. The point of sales was seen immediately as one entered; situated right at the back of the store. Overall, it was easy to navigate within the store and spacious facilities were provided.

Focus Group Observations

When describing Store A's layout structure there was mixed reviews. Participant 2 felt that traditionally when one walked into a store one expected to have a certain aisle structure to lead to each department. He found it to be a maze, where you were required to find your way, on your own in your own time. You would eventually land up where you needed to be whilst mingling through the railings. Participant 3 mentioned that the layout was ordered and structured in an intentional manner. The women's clothing dominated throughout. A large section in the front of the store on the left-hand side for men's clothing and the right-hand side the kids clothing. This layout structure was enjoyed by Participant 4 who mentioned that each section was divided well by allocating its own point of sales and fitting room. It was well executed in terms of flow and spaciousness. The placement of the ladies fitting rooms, situated beside the point of sales, was considered well placed as one was able to view the entire store from that area. The other fitting rooms in the men's and kid's sections were more hidden and required more than one person to manage both the fitting rooms and point of sales. Overall, Participant 3 described store A as clinical and minimalist in approach to store layout. (Refer to Figure 4.26)

Store C was more of a boutique-sized store than a clutter-filled store such as Store D. Participant 1 described that the store had three parts. The front public area could be viewed through the shop front, the private middle area for interacting with the point of sales. Merchandise areas around the perimeter of the store were separated into male and female merchandise. The fitting rooms were situated in the back corner. Participant 2 observed that the two fitting rooms became confusing as there were three doors next door one another. Each door looked exactly the same, however one of the doors led to a staff store room. No signage was placed on these doors to distinguish between the store room and the fitting room.

Public Domain

Every Store A is an individual project, tailored to the characteristics of the site it occupies and the environment in which it operates (Bitfoundry and Trennery, 2014).

Store A is approximately 1400 square meters in size (Grazia South Africa, 2012). The store has one large main entrance and numerous fitting rooms to guarantee a positive shopping experience (Café du Cap, 2012). Due to the ergonomically well-structured, neutral and uncluttered store layout and visual merchandising displays, the element of fashion becomes the focal point within the store (Café du Cap, 2012).
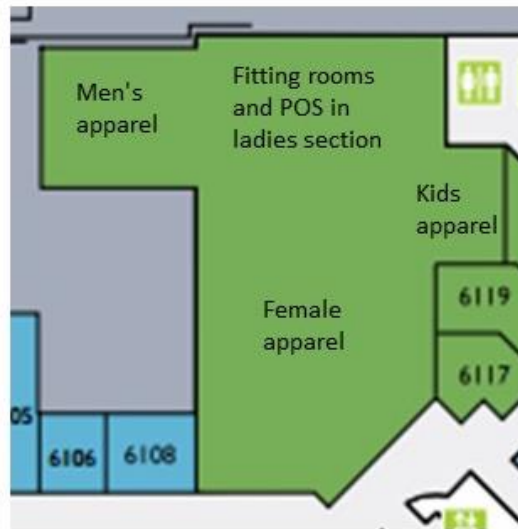
Figure 4.26: Store A: Store Layout indicating positioning and spatial quality of various apparel

(V&A Waterfront, 2015).

4.3.2   Store Appearance

When addressing store appearance, the façade of the store and cleanliness of the store presented itself. Each stores appearance was described and compared below according to the store façade, store front signage and window display.

4.3.2.1 STORE FRONT

Middle LSM Store B and D
Personal Observations
Store D only recently started to develop a new brand image throughout the Western Cape. The new Store D added to the Sandton City mall, displayed the same look and feel as the one opened in the Canal Walk Mall, Tygervalley Centre and V&A Waterfront. Store D at the V&A Waterfront was the smallest out of all 4 stores mentioned. However, the façade indicated a different store name, which had been shortened to an abbreviated name. The façade was addressed differently at V&A Waterfront than at the

other stores mentioned. The ceiling was addressed differently at the façade area to emphasise the window displays. They utilised vertical panelling with hidden light fittings to create a much brighter display window. The full-length glass windows made the façade and the store seem larger (Refer to Figures 4.28, 4.29, 4.30 and 4.31).

The façade of Store B was easily spotted and the entrance into the store was large to allow for high traffic into the store. Store B had a long façade which included a large open back display window. Store B made great use of its entrance to include feature displays, placed very close to the entrance doors to entice customers. Store D followed the same recipe, as they too shifted their feature displays closer to the store's entrance. This change occurred after my second observation visit to Store D (Refer to Figures 4.31 and 4.27).

Focus Group Observations

Clear distinctions were made in store appearance between the middle LSM and the higher LSM stores. Participant 1 and 3 noticed that Store D's façade was transparent which allowed you to look directly into the store. The only aspect used to hinder one's view of the rest of the store was the huge posters on either side in the window display.

Participant 3 observed that Store B utilised the exact same concept that was applied for the store front for Store D. However, there was definitely a different quality in display from Store D to Store B. Participant 1 noted that Store B's façade position gave it a slight sense of privacy. The façade was totally free from clutter, with well-lit window displays to focus on the mannequins. Large posters acted as a division. Participant 4 noted that the store front was wide and merchandise placed almost immediately in the front but it did not feel constricting.

Participant 3 described the store front of Store D having unkempt platforms; all at one height. Store B had many small pedestals which allowed them to place mannequins at different heights. There was an enjoyable composition to their store display. It was noted that Store D had the advantage in terms of their position in the mall, almost approached on a corner with doors wide open. This created a welcoming and inviting façade in utilising concealed glass folding sliding doors. In Store B, you were required to walk down the walkway and then turn left to enter; it was still found to be relatively inviting.

Public Domain

Store B is constantly monitored with an on-going revamp strategy in place to ensure a constant high standard is met and maintained (UK Essays, 2013). Store B strives to present a consistent face to consumers (ACRF, 2014). "*Stores are open with bright shop fronts to reflect the brand's optimism and make customers feel more invited*" (Chain Store Age, 2014).

Smaller signage that protrudes into mall area

Main storefront signage in bold lit up lettering, with no serifs

Timber exposed ceiling structure with directional spotlights

Instore graphics can be seen from outside the store

LCD screen captivates customers as you walk past the store

Long, large timber tables used close to entrance to display garments

Feature displays have moved closer to the front of the store to entice customers to enter the store

No clear aisle space as you enter the store. Entrance is completely filled with displays. Space to walk through is limited

Figure 4.27: Store B Store front.

(V&A Waterfront, 2018a)

VM-Open
back
window
display

Spot lighting

Wall Cladding
Contrast of
white and red

Angled wall
panels/cladding
in Red Gloss
finish

Simple
signage and
logo. No serifs

A store
welcome
sign

Wide store
entrance for
high traffic

Use of
Mannequins in
window
display with
graphics
behind
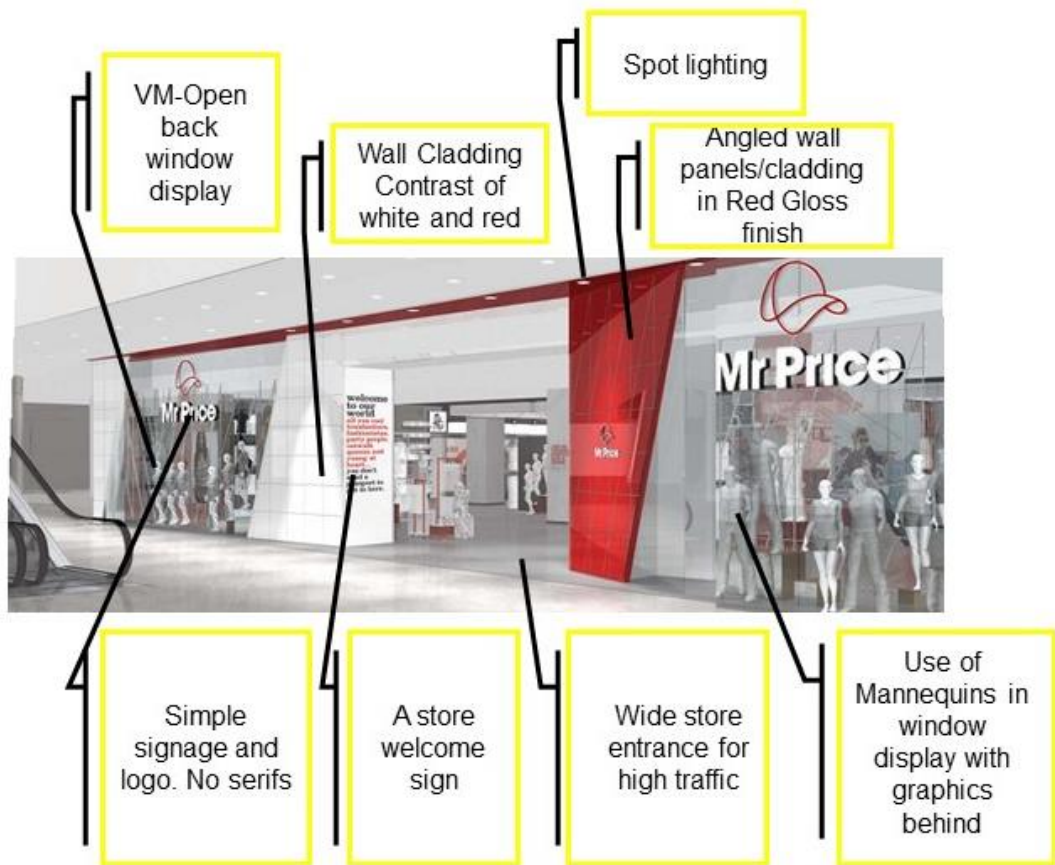
Figure 4.28: Store D façade at Sandton City Mall, Johannesburg.

(Mr Price, 2011)

Figure 4.29: Store D façade at Canal Walk Mall, Century City, Cape Town.

(POP UP, 2014)

Figure 4.30: Store D Façade at Tygervalley Centre, Cape Town.

(Tygervalley, 2016)

Advertising: Large hanging graphics

Feature bulkhead: angled vertical ceiling panels

Signage: Lower case lettering lit up No serifs

Open back window display-see into store

Mannequins raised on plinths, with graphics behind

Large entrance Feature display as you enter. Close to entrance doors

Figure 4.31: Store D Façade at V&A Waterfront, Cape Town.

(V&A Waterfront, 2018b)

High LSM Store A and C

Personal Observations

Great consideration was placed in the presentation of Store A's storefronts to best project their store image. It was especially important that customers entered a beautiful store, representing the latest fashion trends. It gave customers the sense that these items would move quickly and purchasing should happen as soon as possible.

Store A had a larger store front to that of Store C, therefore each façade was designed differently to one another. Store A's window displays were large and enclosed whereas Store C had two small open back window displays. Both facades utilised very different finishes. Store A's finishes were light and bright and well framed, whereas Store C's finishes were dark and detailed. Store A's entrance was fully open utilising folding

sliding doors whereas Store C had large double doors which open into the store with bespoke door handles (Refer to Figure 4.32).

Focus Group Observations

Store A's façade was considered by Participant 1 and 3 to be private as one was not able to see customers shopping whilst standing outside the store. The façade created distance between mall customers and store customers. Both the storefront and window displays were enclosed by frames in a milky white glass. Store A's store front immediately made one realize, even before entering the store, that it was slightly upmarket. There was an exclusivity in the store front and window displays. Only Participant 3 gave an overall opinion about Store C's shopfront, describing the framed open back window displays on either side as laid back. One could see a relaxing wicker easy chair through the one window (Refer to Figure 4.32).

| Mounted Steel Signage with serifs in font | Bespoke door handles | Classic Detailed façade structure | 2 open back window displays |

| Double doors with security detectors | Dark façade in cool grey colour |
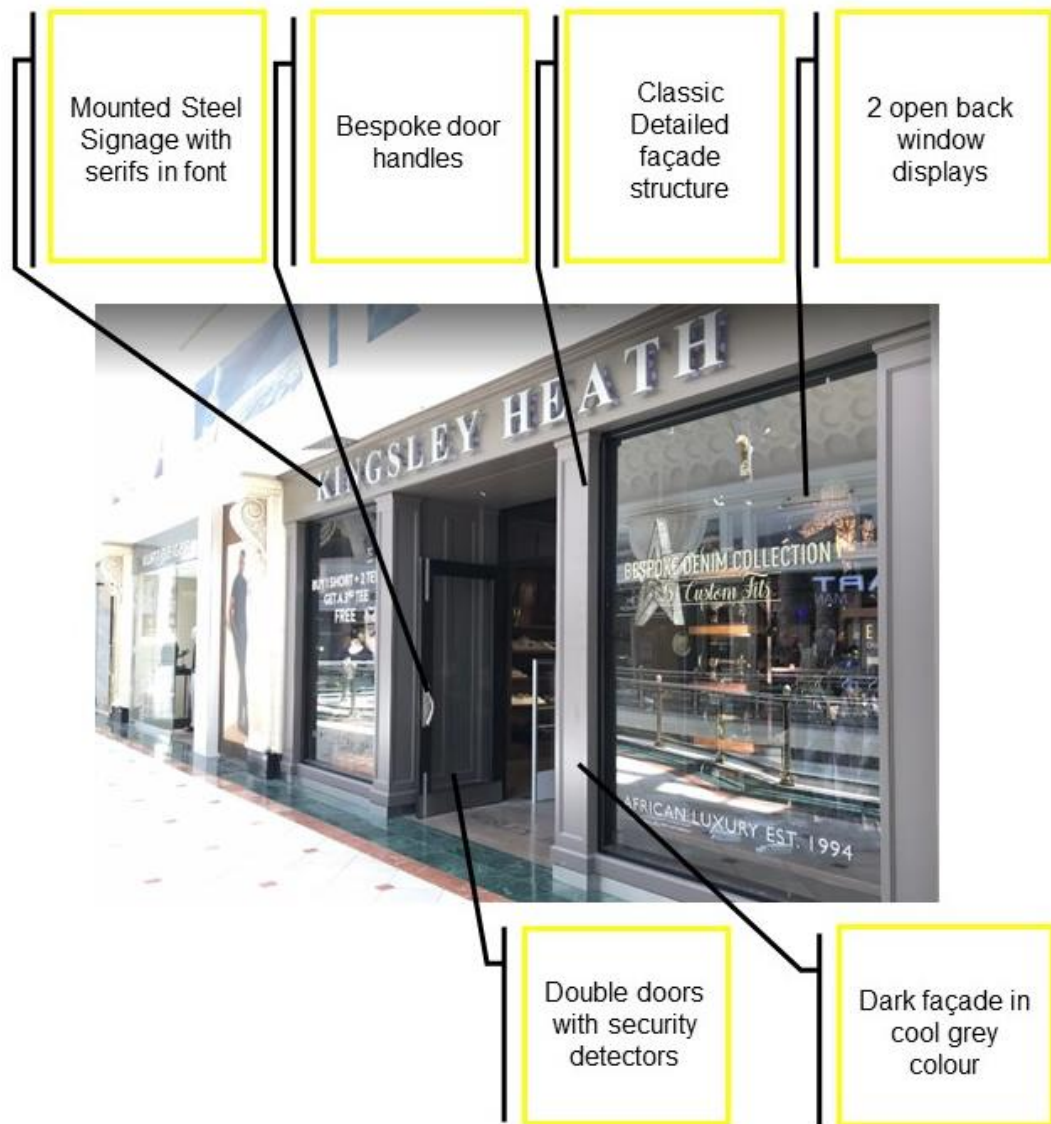
Figure 4.32: Store C: Store Façade.

(Google maps, 2017b)

4.3.2.2 FACADE SIGNAGE

Middle LSM Store B and D

Personal Observations

To support the new brand identities of Store D, new signage was created. It generated a new and fresh brand identity, whilst maintaining their individual character and unique positioning. A large part of the advertising utilised to draw customers into the store was through the use of large bold signage. The store front advertised the new brand name differently to other stores. Shortening the brand name to an abbreviated form, created

a sophisticated identity for the store, to suit the mall location. The store name was well lit, bright and bold in white and red.

In Store B, there were two LCD screens displaying graphics on either side of the entrance by the dividing columns. The store name was bright, bold and uppercase lettering displayed on a large, thick, glossy red header. There were two store brand signs attached to the façade. A small sign attached to the side of the façade, an oval plaque protruding from the steel I beam. The central signage and largest sign placed just below the bulkhead. Furthermore, Store B also made use of graphics and special stickers as advertising tools in their window display.

Focus Group Observations

When assessing the signage utilised for the stores, an interesting finding was revealed by Participant 1 with regard to the type of font utilised for the middle LSM stores versus the higher LSM stores. Store B and Store D both included a font without Serifs whereas; Store A and Store C both included fonts with Serifs. The family of fonts chosen for Store A and Store C's signage were predominantly that of an old fashion typeface whereas; Store D and Store B's signage were more of a minimalistic typeface. This was specifically unique as Store D and Store B did not represent a minimalist brand. Store A was designed to be minimalist however did not utilise a minimalist font. Participant 4 described that Store B made use of a simple font for their store along with the corporate bold and striking red colour. Participant 4 noted that Store D's signage was similar as it was simple, yet prominent. Participant 5 confirmed that the signage was red, clear and identifiable.

Participant 1 observed that Store D utilised their font on all their clothing as branding, it indicated a definite link between Store D and their merchandise. Store A's store name was not advertised or represented on their clothing. Store B had a mixture of both, as some items were branded with their name and other merchandise not. Store B's façade signage was found to be lacking due to its small size, when compared to Store D. Participant 3 conveyed that Store D's façade signage was deliberately larger to emphasise their store brand. Store B incorporated extended arm signage, and at the store front had a red background with white illuminate letters above the entrance.

When posing the question about Store D shortening their store name, Participants 1 and 3 mentioned that this change appealed to a younger market to link to their brand and target market. This is a change that has been phased in to various Store D's. There was an overall agreement between focus group participants that the façade signage of

Store D was well placed. There was an extension bracket with a suspended logo and name for shoppers approaching from the passage. The illuminated "Red Cap" logo was positioned on each glass façade window and also above at the middle of the entrance.

High LSM Store A and C

Personal Observations

Store C's branding was very important to them. Store C depicted South Africa's culture and heritage. The signage and logo of the store was very prominent. The large signage and the Nguni logo; an African symbol of wealth and prosperity, was emphasised on the façade as you were welcomed into the store. It was repeated and emphasised from the minute you entered, through to the fitting rooms, point of sales and merchandise. It was prevalent in everything, even in the clothing that had handmade beading. Store A's signage was bold and clear on their store façade, it stood out against the white backdrop of the window display.

Focus Group Observations

Comparing Store A and Store C's signage was really difficult for Participant 2 due to the difference in store size. Store A was more consistent, even in their letter spacing and where it was placed. It was found to be sufficient and not overly done. Store C's signage was only placed on the facade, floor, and by the point of sales. Participant 3 noted that Store C incorporated uppercase aluminium laser cut letters which were slightly backlit for their store front signage. Participant 4 described that the type of font utilised was indicative of the sophistication but also familiarity. Participant 1 noted that the font contained serifs which created an old-fashioned look of timelessness and old-world charm.

Store A's signage was described by Participant 1 as simple; yet elegant. The size of the store front letters was quite large in comparison to the rest of the subdued design elements. Participant 2 noted that Store A included their store brand name on every glass facade in backlit in milky glass cut out letters.   An interesting point was mentioned by Participant 3 regarding Store A's signage and their identity. She identified that Store A's signage was distinctively more exclusive because even if you did not see the store name; its identity was already embedded in your mind. The store was farmed by the combination of milky white glass and black lines. This concept was carried through to other Store A's around the world. Store A created a very strong identity due to its consistency, which could not be said for Store B or Store D. If the signage were to be removed from their store front. then it would simply become a glazed store front.

However, for Store A, should you remove the Store A name, customers would still recognise the milky white glass that framed it and contained it.

4.3.2.3 WINDOW DISPLAY

Middle LSM Store B and D

Personal Observations

Both stores window displays were appealing and grabbed the attention of the customers as they entered the store or walk past the store. Both Store B and D had open back display windows in their store façade, which included a combination of female and male merchandise displayed on mannequins. As you walked past Store B or D, each store had feature displays placed close to the entrance which drew customers towards the façade. Store D's window displays are open backed, with long vertical rectangular poster graphics hanging behind the mannequins standing on a platform. Each poster showed a graphic of a model wearing Store D's merchandise, with a quote about fashion. White and black painted full-sized mannequins are utilised throughout the store (Refer to Figure 4.33).

Focus Group Observations

Participant 2 noted that Store D made use of feature displays in their aisles. It was made up of a square black steel grid structure to frame each display. Participant 1 described Store D as "loud" due to the large amounts of merchandise displayed but no focal point highlighted, nor was the lighting centred on any specific merchandise. Participant 2 mentioned that Store D's store front had open display windows. This indicated that the items in the window display would need to be changed frequently. An open window display made it easier to change the mannequins. Participant 2 further elaborated that the way Store D had chosen to incorporate their window display in their store layout allowed for maximum use of their floor space. Store D would be required to pay rent for the amount of store space allocated to them; ultimately impacting on how much they were paying per square metre for their store. The percentage of the floor space allocated for window display was also included in their rent; therefore, it was a good use of space. Participant 2 also mentioned that high LSM stores did not mind paying extra for large amounts of space to accommodate for window display. Therefore, Store A had large closed window displays surrounding their store. Middle LSM stores such as Store D ensured that all available space was utilised to its full capacity, maximising on their trade floor area (Refer to Figure 4.33).

Signage:
Lower case
lettering lit up
No serifs

Feature
bulkhead:
angled vertical
ceiling panels

Directional
Spotlights

Open back
window
display-see
into store

Raised floor
as plinth,
using timber
planks.
Running in
different
direction to
the floor

Advertising:
Large hanging
graphics. One
can still see
into the store
past the store
graphics
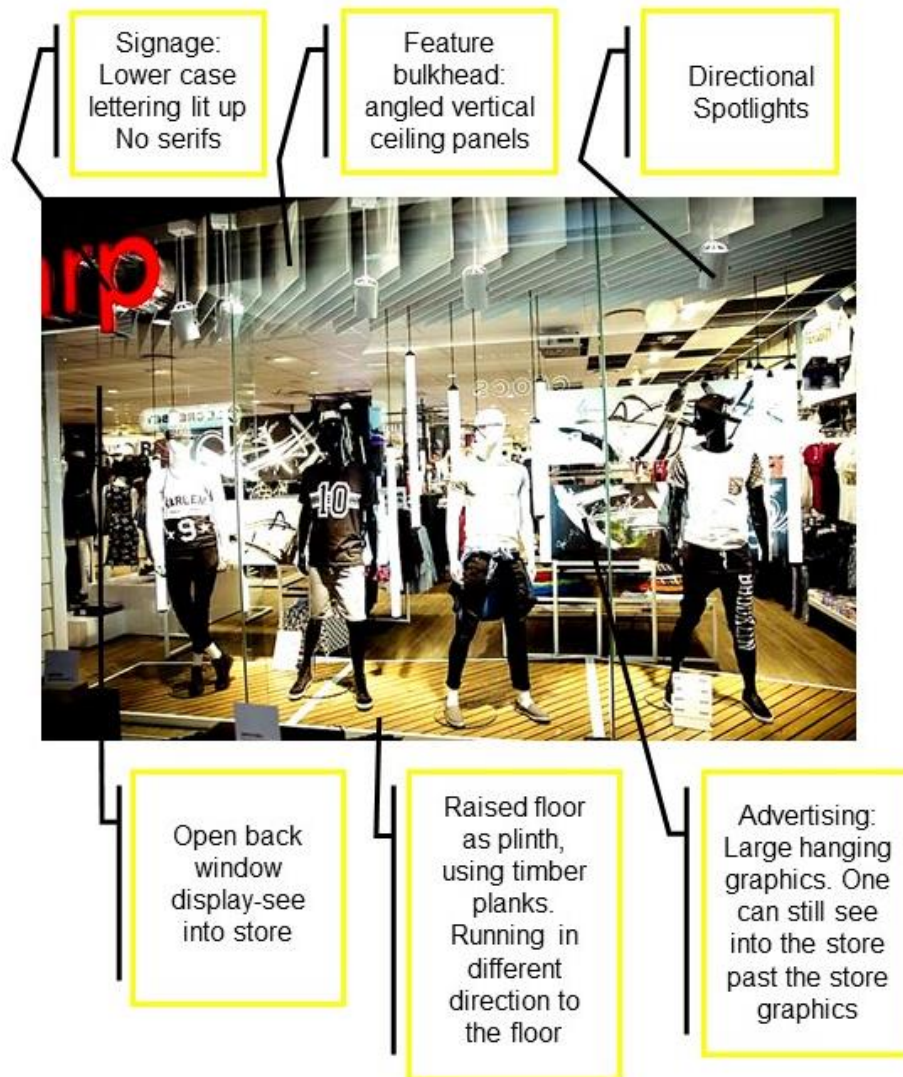
Figure 4.33: Store D Window display.

(Proome, 2014)

High LSM Store A and C

Personal Observations

Store C has a much smaller entrance, and utilised darker finishes within the two-open back, black framed window displays. Each window displayed a combination of male and female apparel. Clothing displayed on mannequins had no head nor legs, the base of the mannequins were steel rods placed into oak timber blocks. The mannequins were white with steel caps on their tops. A colour graphic poster was placed behind the mannequins.

Store A's window displays were closed back, mannequins in each window display were white, with a white backdrop. Each window was well lit with the utilisation of LED's and

directional spotlights. Milky white glass was utilised as a backdrop for the signage, whilst each window was framed with black/dark grey powder coated steel. Different sized plinths in white and grey overlapped one another to create varied heights on which the white mannequins stood. The colourful apparel became the focal point against the white back drop with lighting directly focused on each mannequin wearing the garments (Refer to Figure 4.34).

Focus Group Observations

Store A's window display was described by Participant 3 as provocative and effective. Participant 2 described their window display as strong with simplistic and a minimalist design approach, timeless with greater lighting. Participant 4 noticed that the mannequins in the window display had a minimalist look, which tied in with their store design, viewed as a blank canvas with the merchandise as the focal point.

Participant 2 mentioned that Store A had allocated more space for window displays. Their window display was all white with sleek LED strip lighting that remained in fashion trend. On a given day they may have placed a mannequin wearing a black dress and the following day, utilising the same background, placed a mannequin in a red dress. This identified that their concept was consistent and their focus was mainly on merchandise and not on its surroundings. Participant 2 also noticed that Store A did not include graphics which was familiar with many other stores. Typically, one would expect to have a canvas or a clipped graphic at the back of a window display, possibly sprayed a certain colour or have something displayed on it. Store A did not follow such a trend. In Store A, one may find a number of mannequins rather than relying on decals for lifestyle images to display where its clothing would be most suitable. Participant 3 noted that spotlights were utilised to highlight their mannequins through a minimalist approach (Refer to Figure 4.35).

Store A was very easy to spot due to the large bright entrance and luring closed back window displays which encompassed the store. The display windows invited you to see more within the store, as it did not reveal everything. The glass windows were framed in black powder coated steel, the interior of the windows was all white, displaying clothing on all white mannequins (Refer to Figure 4.3.9)

The minimalist approach to their store interior was carried through into their storefront. A blank canvas, monochromatic closed store front with very neutral spotlights was used to highlight the art which were the mannequins in the window display. Displayed, in the store front, was a pair of shoes in the front and a handbag at the back placed on

different pedestal heights with a white fabric veil in front of it. This type of display was very intriguing to Participant 3 as one could still view the shoes and handbag through the white veil, which offered a sense of mystery and exclusivity (Refer to Figure 4.3.9). It reminded her of Louis Vuitton, who's storefronts were designed in a similar nature. This related back to Store A as a luxury brand store. Store C's store front was described very differently to Store A. Participant 3 mentioned that Store C had a laid-back approach to their shop front. When looking into the store, one saw a wicker easy chair as part of the display. It was a much smaller shop front with a wooden framed window display on either side which was used to depict a lifestyle as a back drop.

What stood out for Participant 4, with regard to the display and the shop front of Store C, was the way in which they displayed the men's t-shirts and shirts on wooden beams or poles. The window display covered the whole window so one would need to enter the store to be able to see what else they offered. Participant 3 mentioned that for Store A the window display was closed off, bringing about exclusivity. The middle LSM stores utilised many mannequins and props which showed a very distinctive difference between middle and high-income stores. Participant 1 mentioned that the middle LSM stores made use of decals to show a person modelling the actually merchandise, in order to the depict a lifestyle. Store A and Store C made use of the interior to show the lifestyle aspects.

> Back lit signage in white, with serifs, uppercase letters

> Milky white glass for signage area and windows framed in black steel

> Completely white base interior of window displays

> Well lit window displays-Large spotlights used in both displays

> Both window displays: Different sized and coloured plinths in white and grey overlap one another to create varied heights

> Kids apparel: closed back window display

> Female Apparel: Closed back window display

Figure 4.34: Store A Store Appearance in window display.

(V&A Waterfront, 2018c)
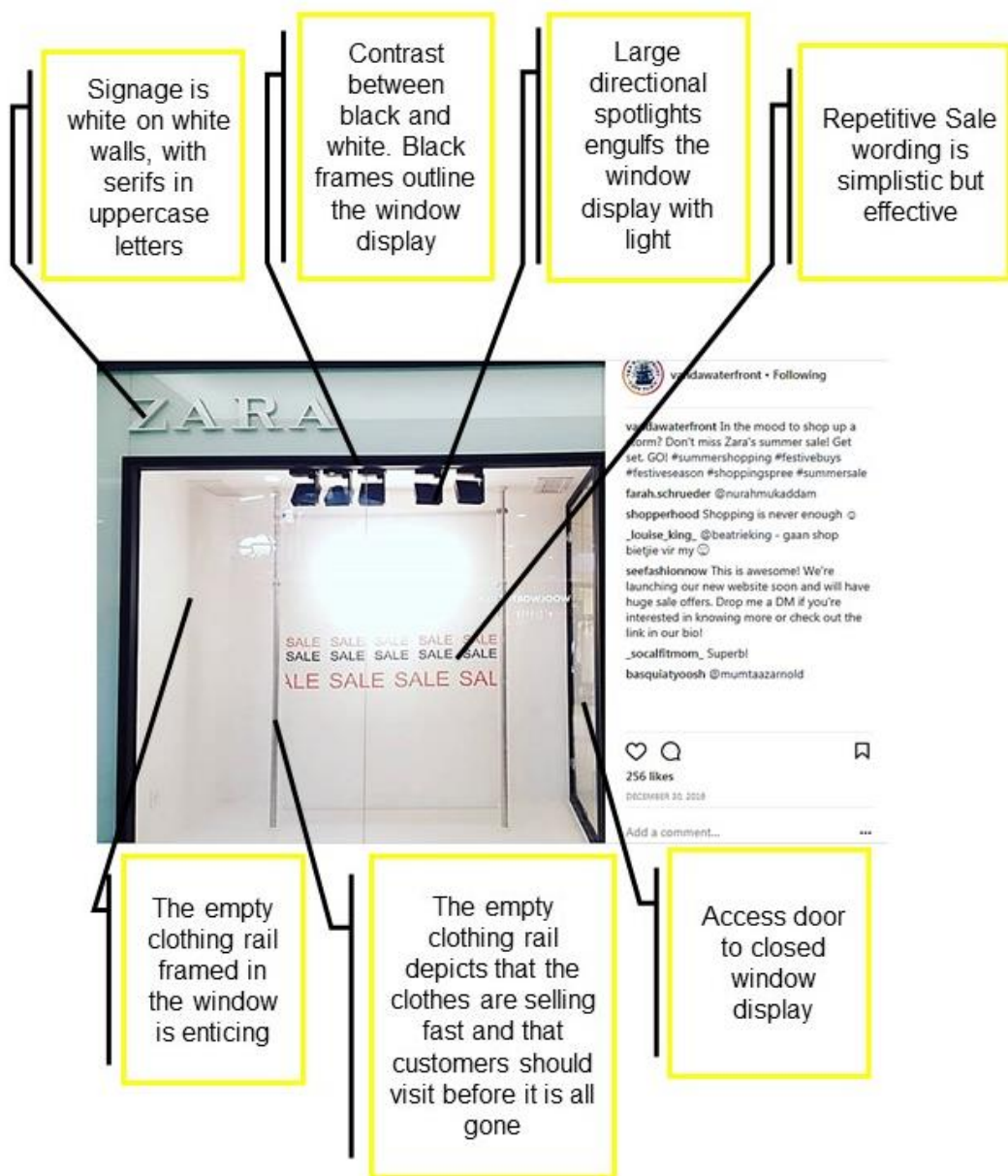
Figure 4.35: Store A Window Display on social media.

(Instagram, 2016)

4.3.3 Fitting Rooms

When analysing the fitting rooms design within each store, I the researcher and focus group participants described and compared the look and feel in respect to the fitting room size, layout, number of cubicles per gender, finishes applied and whether it was conveniently located for customers.

4.3.3.1 THE LOOK AND FEEL

Middle LSM Store B and D

Personal Observations

Store B carried through a "locker room" theme in their fitting rooms. There were seating areas set up centrally within the fitting room area. It included soft and hard seating and hanging space for garments on hooks and a rail. All fitting room doors were numbered in black with a red circle surrounding it. The fitting room doors were similar to changing room lockers, utilising restored timber planks, with openings below and above for ventilation. The door handles were thin, long and steel (Refer to Figure 4.36).

Store D added fun elements to their fitting room doors, which included humorous quotes and digital media as you entered the fitting room area. There was an LCD screen by the entrance that displayed advertising graphics. There were numbers on each cubicle door, with a seat, a large mirror and grid like metal structure to hang garments on, placed in each cubicle

Overall, the fitting room service was better in Store D than at Store B, as staff members were more willing to assist and offer guidance in making the right purchasing decisions. Staff members were on-hand but not intrusive. One staff assistant was situated in Store B at the fitting room's main entrance to help with the number of people entering. Both a male and female staff member stood to assist customers by Store D's fitting rooms.

Focus Group Observations

Participant 1 and 3 mentioned that Store D included a grid system which was enjoyed. One could hang as many items on this grid system as you wanted. Each fitting room included two mirrors. Participant 1 appreciated that Store D focused on how the fitting room worked for the customer. There was no opening at the bottom of the fitting room door which accommodated for safety and privacy, especially if you have kids with you. They also included a little stool which was ergonomically comfortable to put on shoes. In its simplicity it was very functional and each fitting room quite comfortable and spacious. Participant 4 noted the use of sayings within the fitting room area, such as *"take me home"* or *"decisions decisions"* which was considered to be quite engaging when visiting the store.

Store B's fitting rooms were well placed in each merchandise area. However, Participant 3 expressed that the signage did not indicate which fitting rooms were male or female as the signage only said *"Try It On".* By placement it was assumed by

Participant 2 and 4 that everyone would know how it worked due to their layout. Participant 3 gave an overview of Store B's fitting rooms, mentioning that they were quite spacious and had an ample amount allocated for the size of the store. They also included visual interaction with the customers by including humorous quotes. The design of the fitting rooms looked like locker room timber doors with a long-upholstered bench as a rest area in the centre of the u-shaped formation of the fitting rooms (Refer to Figure 4.36). Participant 4 enjoyed Store B's fitting rooms more than Store D. Whereas, Participant 1 preferred Store D's fitting rooms. However, Participant 1 did not engage with both store fitting rooms in order to have made the preferred decision and Participant 4 did.

Public Domain

The look and feel of a retail stores' fitting room space is an opportunity to communicate brand personality. Store D utilised their doors of each cubicle to bring through the message of the company by including fun captions on each door (Dalziel and Pow, 2012). The perfect fitting room is a place of sanctuary where you are not hurried and the atmosphere is calm (Dalziel and Pow, 2012). The more effective and enjoyable the experience is within the store; the more chance a retailer has to convert the customer to purchase. The fitting rooms form part of this experience and have become a crucial part of the customer's journey. Stores that are not delivering in this area will be left behind; as customers are now expecting more (Dalziel and Pow, 2012).

Finishes: Wood panelled doors with long easy accessible door handle

Timber divider panels cladded with mirror

Ceiling and Light fixtures: Herringbone ceiling with downlighters

Quoted graphics on panels used as dividers in the space with a seating area below. Noticeable with person in the corner

Each door is clearly numbered in store brand colours: red and black.

Ventilation below each door. Locker room door type

Fun Graphic of model wearing Stores merchandise

Figure 4.36: Store B: Fitting Rooms.

(Flair, 2014)

High LSM Store A and C

Personal Observations

All the fitting rooms in each division in Store A have the same look and feel of simplicity and minimalism. Each fitting room cubicle provided the basics: mirrors, good lighting, a seat, hooks and curtains utilised to close each cubicle instead of doors. They are spacious and luxurious with appropriate finishes and fittings.

Store C's fitting rooms were uniquely designed to project comfort, elegance and style in the great choice of luxuriously rich, dark yet masculine finishes and fittings. African luxury was exuded through the brown upholstered, studded leather couch placed

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inside. The walls were painted in dark rich vintage brown. Hung on the walls were framed black and white graphic images and a large graphic of the Nguni logo. It was quite a large, comfortable fitting room. It accommodated for furniture, a large framed mirror, high ceilings, a chandelier and the signature logo on the wall behind the couch (Refer to Figure 4.37).

Focus Group Observations

Participant 2 observed that Store A had a large lobby when entering the female fitting room area. The walls in this area were surrounded by full height mirrors which created a memorable environment. Mirrors and an allocated place for one's bag were also placed in each fitting room. A comment was made by Participant 1 with regard to Store A not providing enough hooks to hang garments on.

Participant 1 (2017) said: *"I don't know how you guys use fitting rooms but I have my clothing which I've taken off, then I have the clothing I must put on and then I have the "I want this or don't want this or may want this" so I need a lot of hooks to sort out my life. Store A did not really give me that sorting out my life thing."*

Participant 1 conveyed that in terms of seating inside the fitting rooms, a small chair was provided in each. The white leatherette seat was too small to place many things on. Ergonomically, a bag would not fit on top of this chair and placing your foot on it to tie your shoes was difficult in the process of fitting on garments.

Out of all the stores visited Store A was the only store that did not have doors on their fitting rooms for privacy. They included curtains which were not enjoyed by participants 1, 3 and 4 as it could easily be opened. A door provided more privacy as it could be locked especially when bringing along your kids. Participant 1 emphasised that Store A's fitting rooms provided a great look but did not accommodate for functionality

Participant 2 expressed that the fitting room waiting area, with luxury lounge chairs at Store C, provided a memorable shopping experience. Participant 3 experienced that the fitting rooms themselves were very inviting and quite practical with cast buffalo type horns to hang garments on, chesterfield deep buttoned type leather seating. Each fitting room opened with high elegant doors. Participant 4 added that they also made use of framed pictures on the walls.

Public Domain
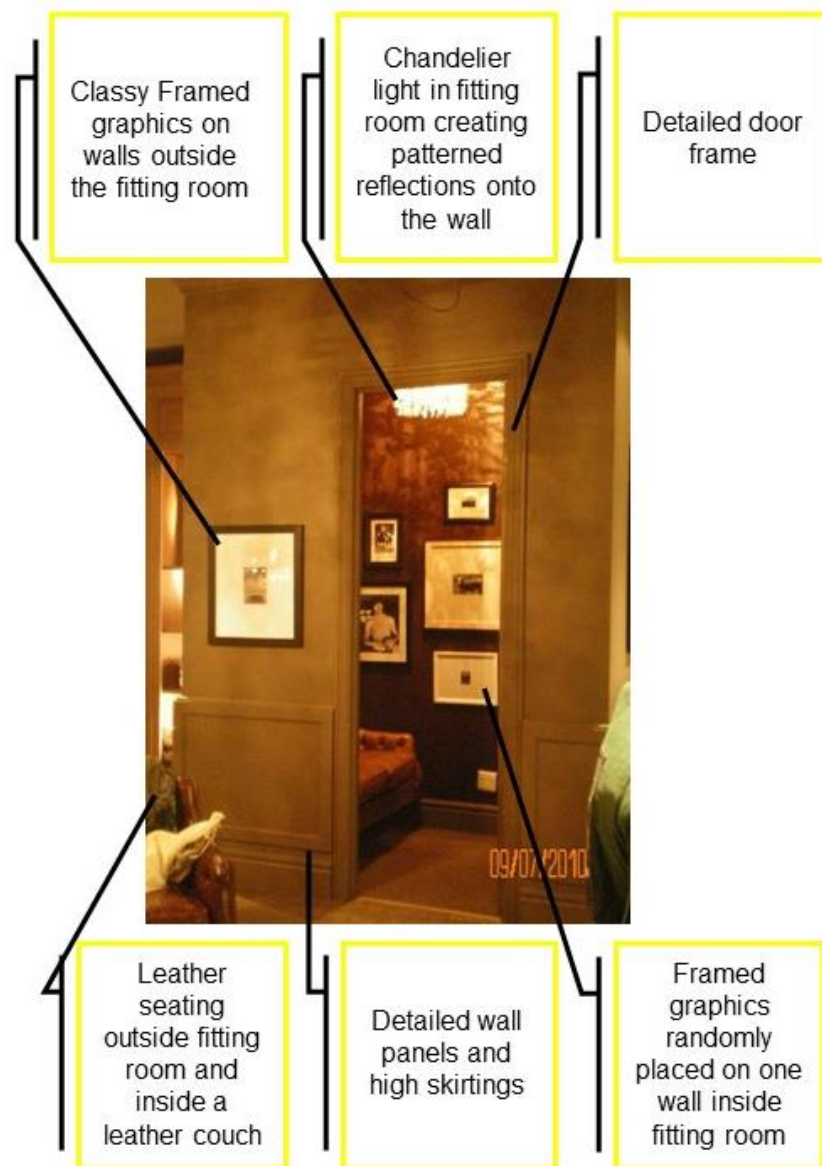
Figure 4.37: Store C unisex fitting rooms.

(ShopDisplay, 2018)

4.3.3.2 SIZE

Middle LSM Store B and D

Personal Observations

Fitting rooms were more accommodated for in Store B than Store D due to the size of the stores. The female fitting rooms at Store B took up double the amount of space, catering for double the number of female customers. There was sufficient space inside each cubicle in Store B, they were spacious, comfortable and have good lighting. Store D's fitting rooms were spacious enough in size for 2 people. The space also

accommodated for a seat, mirrors and designed hanging system for garments. Limited space surrounded the entrance, in order to control the amount of people entering.

Focus Group Observations

Participant 3 recognised that Store D's fitting rooms were the most accommodating for kids. They were sufficiently comfortable for mothers with prams. Participant 2 and 3 identified that Store B, did have two cubicles that are larger than the rest to accommodate for a pram, trolley or paraplegic. Participant 4 felt that both Store B and D's fitting rooms were quite spacious, but space wise she preferred Store B's fitting rooms.

High LSM Store A and C

Personal Observations

Store A was a large store. The female fitting rooms area being large, and long, accommodating for several cubicles. Each cubicle itself was standard in size. There was sufficient space for one person, including one disabled fitting room cubicle which was larger in size. The men's fitting rooms' area was smaller, with less cubicles than the female area. The kids section had the least fitting room cubicles, which were not spacious. Store C's individual fitting rooms were more spacious than Store A. It was comfortable for at least 2 people and a two-seater couch had been placed inside it, with high ceilings to accommodate for a chandelier.

Focus Group Observations

Participant 2 mentioned that Store A's cubicles were standard in size and did not accommodate for a pram or trolley however, the large lobby space did. Participant 1 and 2 noted that Store C's fitting rooms were very luxurious in size due to all the fittings and furniture included in the fitting room. However, Participant 4 noted that the fitting rooms were quite small, whilst still practical for one person to utilise. Participant 2 felt that it was not appropriate to have such a luxurious fitting room as all that one needed was hanging space, a chair and mirror. Store C had a 2-seater lounger in their fitting rooms which he described as very dramatic. However, he couldn't imagine himself relaxing in such a fitting room.

4.3.3.3 FINISHES USED

Middle LSM Store B and D

Personal Observations

The narrow entrance led customers into the fitting rooms, it was highlighted with a glossy red paint colour. Store D's fitting room cubicles included timber doors with black vinyl lettering on the front of each cubicle door and numbered in red vinyl. A red seat was placed inside each fitting room with a black grid rail for hanging garments. The lighting in Store D's fitting rooms were not flattering, it created a warm and stuffy environment. There were advertising boards and an LCD visual screen displaying social media imagery as you entered.

The same fitting room finishes were used for both male and female fitting rooms in Store B. All fitting room doors were numbered in black with a red circle surrounding it. The fitting room doors were similar to changing room lockers, with openings below and above for ventilation. The door handles were thin, long and steel. The doors were designed to look like restored timber planks. There were advertised graphics on the front of each door. A herringbone ceiling had been installed in this area with large fitted directional spotlights. There were mirror cladded sections separating one fitting room door from the next. A long brown leather upholstered ottoman was situated outside the fitting rooms for waiting customers in the male section and benches in the female section.

Focus Group Observations

Participant 1 noted that the materials utilised in Store D were cost effective but the hardware utilised was of a good quality to keep up with the traffic. Participant 3 described Store D's fitting room interior finishes as timber veneer doors, plastered white walls, with shabby skirting. Each timber veneer door was marked with a number. Inside the fitting room there was one mirror and one seat. Participant 1, 3 and 4 noticed a full-length metal grid on one wall for hanging garments which offered more flexibility than a standard hook.

Participant 3 expressed that Store B's fitting rooms were much more sensitively done utilising timber boards with member's placed in-between. The design was addressed in a typical industrial loft style approach. All participants agreed with Participant 3's statement with regard to the aesthetic of Store B's fitting rooms. Participant 3 noted that the timber was utilised throughout for its U-shape structure and layout. Participant 4 mentioned that she enjoyed the visual interaction with the signage and lettering and

graphics incorporated on the mirrors and doors were fun and added to the customer experience. Participant 1 identified that the doors were less private than Store D as the door did not extend to the floor. The gap left open allowed someone to see your legs when fitting on a garment (Refer to Figure 4.36).

High LSM Store A and C

Personal Observations

The fitting rooms for Store A and C were both uniquely designed to suit their store image in utilising a variety of different finishes. Each cubicle in Store A had a small seat, smaller than standard size. The seat had a white hard surface on top, with its structure finished in gun metal. There were 2 mirrors in each cubicle that met at the corner with lighting installed in strips on only one side of each mirror. Thick, good quality curtain fabric served as doors on each cubicle, with lacked privacy as there were no locks. The floors were tiled and each cubicle was constructed utilising steel framework and Gypsum board for the thin walls.

Store C's fitting rooms were uniquely designed for comfort, portraying elegance and style in the great choice of luxuriously rich, dark yet masculine finishes and fittings. African luxury was exuded through the buttoned-down couch placed inside upholstered in brown studded leather, the walls were painted dark rich vintage brown.

Focus Group Observations

Participant 3 gave a detailed description of Store A's fitting rooms mentioning that they were designed in a simplistic and minimalistic approach. The walls looked like Gypsum boards with a powder coated metal frame surrounding them and a recessed shadow line skirting along the bottom. Each cubicle had black or dark grey curtains hanging on rails instead of doors for privacy.

Participant 4 noted that inside each fitting room was plush carpets, a mirror and the finishes utilised inside were standard melamine or Formica which was hardwearing and easy to clean. Participant 1 identified that a small stool and two hooks were provided, which was hardly enough space to hang garments considering all the items allowed to take in with you. She also elaborated that the chair was rather impractical for tying shoes or placing one's bag on.

Participant 1 mentioned that Store C's fitting rooms were spacious however; the mirror incorporated was small in comparison to cubicle size. Each cubicle was carpeted and finished off with a louvered detailed door for privacy. Hardware had been carefully

selected and designed for its interior and exterior. Participant 3 described that the finishes used were of a high standard to uphold the luxury brand represented in Store C. She elaborated about the chesterfield deep buttoned leather seating placed inside with cast buffalo type horns for hanging your garments, carpeted flooring in each cubicle and louvered detailed doors for privacy. Participant 4 agreed with Participant 3 mentioning that the finishes used are slightly above standard to uphold the overall aesthetic of the store brand and identity.

4.3.3.4 LAYOUT

Middle LSM Store B and D

Individual Observation

The layout of the fitting rooms in Store B were well-structured, it was large, spacious, with a sufficient quantity of cubicles lined up next to one another and seating areas inside the fitting room area for waiting customers. The men and women's fitting rooms differs in layout due to the size and location within store. The men's fitting rooms were lined up along one wall with seating on the other wall. The female fitting rooms positioning created a U-shape with seating in the middle.

In Store D, a narrow entrance led customers into the unisex fitting room area. Limited space surrounded the entrance to control traffic. A small clothing rail was fitted in a tight corner for discarded garments that customers no longer wished to purchase. Store D's fitting room area was a lot smaller in size but they were still able to accommodate for a sufficient quantity of unisex fitting rooms, the layout of the fitting rooms cubicles was spacious and structured.

Focus Group Observations

Participant 3 had a memorable experience in Store B's fitting rooms. She described that Store B incorporated pause areas, such as long linear benches with glass screens outside the fitting room cubicles. It was centrally space where you could sit and read a book or wait for someone. These seating spaces were well placed and interesting signage and graphics were included on the glass divider screen to attract the customer (Refer to Figure 4.36).

During her encounter with this it caused Participant 3 to recall an experience she had when she was much younger. Participant 3 (2017) said: *'I remember going shopping with my mom when I was little and getting so highly bored and frustrated and you need that pause area. I thought to myself that this is so well placed.'*

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High LSM Store A and C

Individual Observation

Store A's fitting room space was quite large, but the cubicles itself were standard in size. The female fitting rooms had a service counter where a sales assistant waited to assist customers. As you walked in, there was a large mirror covering the wall. When turning into the space the circulation area seemed larger than the width of the cubicles. The male and female fitting room section was narrow and long. The female fitting rooms were placed parallel to one another in the space. In Store C, there were two unisex fitting rooms situated next door the store room, positioned opposite the visual merchandising displays in the male section. Both Store A and C's fitting room layouts varied due to the difference in size of each store. Store C's luxurious fitting rooms were quite spacious, containing a two-seater leather couch along one wall, large mirror along another, and frames and logo on another.

Focus Group Observations

When discussing the layout of the fitting rooms, Store A's fitting room layout stood out the most to Participant 3. Participant 3 (2017) described Store A's ladies fitting rooms as a dance hall foyer space, in a horse shoe shape. As you walked in there were many mirrors *'so you could come out of your very luxurious fitting room and do a little waltz and see what you look like in front of these big mirrors and then go back into your fitting room'* She mentioned that it was an enjoyable extra addition to the experience as sometimes people preferred to have friends with them and this contained fitting room space allowed for this. Participant 2 agreed as he too had an experience whilst waiting inside this large fitting room area. Participant 2 (2017) said *'I waited once for my girlfriend to fit on something. I did not mind because I sat there and looked at myself and I was with my nephew and he was running around and I could see him in the mirror which was quite a memorable experience.'*

4.3.3.5 NUMBER OF CUBICLES OFFERED PER GENDER

Middle LSM Store B and D

Personal Observations

The female fitting rooms at Store B took up double the amount of space, catering for double the quantity of female customers. There were 6 standard sized male fitting rooms, and 15 female fitting rooms, 2 of which seem larger than the rest. Fitting rooms were more accommodated for in Store B than Store D due to the difference in store size. Larger fitting rooms were designed for the females than the males, not only in size but in number in Store B. Store D accommodated for 10 spacious unisex fitting room

cubicles in the small area. Each was spacious enough for 2 people or a mother with a pram.

Focus Group Observations

According to Participant 2, adequate fitting rooms had been provided for in Store D in terms of their small store size, location of the store and the type of mall. Participant 3 noted that there were 10 unisex fitting rooms clearly indicated with signage. Participant 1 and 5 di did not enjoy the unisex fitting rooms. However, Participant 4 disagreed, as she was accustomed to utilising unisex toilets at work, which to her was much the same as utilising a unisex fitting room.

Participant 3 identified that Store B had 15 female fitting rooms and only 6 male fitting rooms. There was a very clear divide between the number of cubicles offered per gender and the separation of them in store, however their signage did not indicate a specific gender. Participant 2 noted that there was an adequate amount provided per gender. It was mentioned by Participant 4 that it was a culture known that men did not often require the use of fitting rooms. Participant 3 (2017) mentioned that one of the male staff assistants, stationed at the men's fitting rooms in Store B said *"we have got less because guys don't like trying on as much"*

High LSM Store A and C

Personal Observations

There were 4 male fitting rooms, 12 female fitting rooms and 2 kids fitting rooms in large sized Store A. There were only 2 spacious unisex fitting rooms in the small Store C. Store C has fewer fitting rooms than Store A, but was due to the vast difference in store size. However, Store C did not require more than 2 fitting room cubicles.

Focus Group Observations

Participant 3 mentioned that Store A provided many fitting rooms and catered well for each gender. There were 12 ladies, 4 men's and 2 kids fitting rooms in their separate merchandising areas. If the one fitting room area was full, then another fitting room area could be used, which allowed for flexibility. Participant 2 noted that Store C had the least amount of fitting rooms per gender but it was adequate when considering the size of the store; in total only 2 fitting rooms. One for ladies and one for men however, there was no particular signage to indicate this therefore, it could be unisex.

4.3.3.6 LOCATION IN STORE

Middle LSM Store B and D

Personal Observations

Store D's fitting rooms were placed at the back of the store, close to point of sales. Its location was convenient, as it encouraged customers to try on garments and then immediately go and pay at the point of sales. The male fitting rooms in Store B were centrally placed, close by the male merchandise. The female fitting rooms were in the female section. There was signage that said *"Try it on"* which led the way to the fitting rooms. For privacy purposes, they have been located at the back of the store in the corner of the female underwear and sleepwear section. If you were a first-time customer, the female fitting rooms would not be easy to find as they were well hidden in a corner.

Focus Group Observations

Participant 3 stated that Store D's fitting rooms were located right at the back of the store. Participant 1 found that due to the tall merchandising units in store there was less visibility in seeing who entered and exited the fitting room area if staff were not present at its entrance.

There was much debate around the location of the fitting rooms in Store B. Participant 2 conveyed that in the mid-section there were 2 or 3 fitting room cubicle doors which were more exposed than the rest and opened directly to the merchandise area. It was assumed that these were intended to be larger to accommodate for the disabled but no signage was included to stipulate this. Depending on which fitting room you chose, some were more exposed than others, therefore it did not provide the same amount of privacy for all.

There was only one sign that said: "*Try it on".* Participants 1 and 3 felt that it could be quite confusing to customers. There was an experience explained by Participant 3 (2017): *'It actually happened; a man went into the ladies fitting rooms as I was in the store and I said to the woman, oh you see this doesn't work so well as its not demarcated between female and male and that's when they busted me and told me to leave the store.'* Participant 4 felt that by the way the store was laid out, one could get a sense of what fitting rooms were allocated for males or females.

High LSM Store A and C

Personal Observations

There were fitting rooms in each merchandise section in Store A: kids, men and women. The men's fitting rooms were tucked away in a corner. The main fitting room area was in the female section. Store A contained female fitting rooms which were situated towards the back of the store, next door the point of sales. It was centrally placed at the back of the store in the female section for security purposes. All the fitting rooms were enclosed and discrete. In Store C, there were two unisex fitting rooms situated next door the store room, positioned opposite the visual merchandising displays in the male section.

Focus Group Observations

The location of both Store C and Store A fitting rooms were well placed. Participant 1 and 2 noted that Store A's female fitting rooms location was ideal, from an operation point of view, as the fitting rooms were placed closer to the point of sales. If shortage of staffing should occur, then the fitting rooms and point of sales could be stationed by one staff member. Shop assistance could be given quickly and safely.

Participant 2 explained that Store C's fitting rooms were also located close to the point of sales. They had two fitting rooms which were easily noticed. The close proximity of the point of sales and fitting rooms created shopping ease for the customer and enforced better security measures for the store.

4.3.4 Fixtures and fittings

Tangible retail design concerned the usage of fixed, material cues in the design of the store. The fixtures and fittings utilised instore were compared below.

Middle LSM Store B and D

Personal Observations

More standardized and cheaper fittings were utilised within Store D than Store B. In Store B, each merchandise areas fittings were well thought through in their placement and choice. All light fittings in Store B were divided into different sections equally to produce a well-lit space. Pendant lighting was installed at different heights within the herringbone and timber cladded ceilings. Visual merchandising displays were installed onto the walls in timber and painted steel. The steel was painted in fun colours with a combination of natural timbers. The walls were cladded with timber in some area where visual merchandising displays were installed. There were white painted plastered

ceilings with track lighting, down lighting, and air vents fitted into various sections. There were fake green walling displays, boxed with timber casing utilised in the female section. There were white timber panelled ceilings, columns and face bricks walls in the "Body" area. A white track lighting system was fitted to the timber panelled ceiling. White vintage display tables, and benches with detailed splayed legs, some painted pink were utilised as visual merchandising displays in the "Body" (undergarments, sleepwear and active wear) area. Darker timber vintage designed tables were used for folded garments. The tables and benches were placed at different heights. Half body mannequins were utilised to display bras and sportswear. The home décor merchandise was displayed on white bleached timber boxes and shelving units. It was noted that different fittings for lighting and displays were utilised in each area to suit the theme or design concept created. Softer colours and warmer lighting were utilised in the female section to achieve varied experiences between the male and female sections.

Store D's light fittings changed towards the back of the store by the male and female accessory and footwear area. Large round hanging pendant bulbs were grouped together as features over key display areas for footwear or accessories. The lighting selection and amount thereof influenced comfort; which created warm, unventilated areas. Some of the ceiling panels in the footwear area were timber rather than standard plastered ceiling boards. These were randomly placed. Large round directional down lighters were installed in the ceiling boards directed at each display in female and male clothing areas. A combination of round air-conditioning vents and 600x600mm tile vents were fitted in the standard ceiling boards. Visual merchandising displays were placed around the columns in Store D to disguise the column. Quotes in lowercase laser cut 3D coloured lettering were fixed onto the columns. Walls in Store D were cladded with timber panels, used for slatted wall display systems.

Focus Group Observations

Participant 1 viewed the fittings used in Store D as stock standard and classified it at the lower end of the cost spectrum as it was not custom designed for the brand. Participant 3 observed that there were vertical and horizontal fixtures utilised on the walls of Store D. They varied in type, but they could not be manipulated in any way. A puck wall system was utilised for hanging merchandise and wire grid systems used in the fitting rooms. Unfortunately, the fixtures were not well maintained which led Participant 1 and 3 to identify the poor quality and low cost of the fixtures, especially Participant 1 who mentioned the problem with the peg board system integrated.

Participant 1 (2017) said: *"The problem is the pegs and hooks are mass produced those machines aren't as accurate by the time they get to the 1000th unit, so it doesn't work as well as it should because the angle is slightly off."*

Participant 2 noted that the mirrors fixed within the fitting rooms were adequate but no frame surrounded them. This indicated that the fixtures were quite basic, with no added trimmings. Participant 1 noted that Store D had small mirrors that were angled at the bottom of footwear showcases, so that one could see the shoes you were fitting them on. Participant 4 compared the locking systems used on the fitting room to a public toilet locking system, which could be easily mounted. This indicated to Participant 4 that the basic idea was only for practicality and not for visual appeal.

Participant 3 identified that the light fittings in Store D were not directed on anything particular, especially in their shop front. They had 5 projectors in store which projected random graphics but did not capture anyone's attention. Only Participant 3 noticed them at the time of visiting Store D. Each projector was mounted at a different height but above normal level of sight. One would have to look up to notice and watch was being projected.

When entering Store B, Participant 3 noticed a proper screen recessed into the wall, they made use of LCD screens as opposed to just projection that Store D utilised.

Participant 1 recognised that the same fixture and fitting systems were utilised in Store B and D. However, Store B offered interchangeability in utilising different colours in various areas which was enjoyed. Store D did not show any consideration for garments hanging on the floor. Their display systems did not include a plinth to offer height off the ground to avoid garments from hanging onto the floor. In Store B, the walls had a shelving unit below their hanging merchandise which kept the floor free from clutter. The side by side hanging units had a plinth to suspend clothing off the floor. Both Participant 1 and 4 identified Store B and D's display systems as standard. Store D's display systems were practical but Store B's worked in the store practically and aesthetically, as it had an almost rustic appeal to suit their store image.

Participant 1 enjoyed that the wall brackets utilised were chrome plated within some areas and white in others. The same systems were utilised throughout but the finishes for the merchandising units varied. The free-standing units were moveable to allow for change. Participant 2 also acknowledged that Store B had a variety of floor and wall fixtures which created a certain visual dynamic. Participant 3 mentioned that Store B

merchandise was flat packed and hung up. She noticed neat, robust, white Duco finished timber oak tables and hanging rails. An innovative use of some fixtures and fittings with copper suspended beams for hanging purposes. One thing that stood out for Participant 2 was the use of real merchandise as part of their visual display. They utilised real merchandise to communicate the products housed within that particular area. Participant 3 enjoyed that Store B had wall bands which were left untouched to create an industrial look and feel in some areas of the store. They did not try and hide it with clever details but rather chose to showcase the raw finishes in store.

High LSM Store A and C

Personal Observations

Store A's visual merchandising displays in all 3 divisions had recessed lighting installed on the top and bottom of each display unit. Each built in unit accommodated for hanging and folded garments in the male and female section. Tall black framed mirrors were fixed to many of the columns and display units in each section. It seamlessly created a larger space and hid the columns (Refer to Figure 4.38). Energy efficient low voltage lighting was utilised to highlight the display units. The minimalist repetition of the same type of unit was seen throughout the store. Store A had fire signage placed on the walls above the display units, which made use of the high floor to ceiling space. There was signage fixed to the white wall which directed customers to the male and kids merchandise section.

Store C has detailed fitted cornices, dado rails and skirtings throughout the store. The detailing was carried through into the design of all display units. The visual merchandising display units along the walls were all custom designed and fitted units (Refer to Figure 4.39). Store C had a minimal amount of free-standing clothing rails within the store. Majority of the merchandise was displayed within the built-in units or folded and placed on tiered tables. The lighting for the visual merchandising display units were built into the sides each display unit. Large black spotlights ran along tracks throughout the store. Large beautifully beaded chandeliers were centrally placed in the front and back of the store. Mirrors were placed on the display units in the centre of the store, facing one another. It mirrored the footwear displayed below on built in shelving (Refer to Figure 4.39). The ironmongery incorporated on the fitting room doors and main entrance doors were custom made, uniquely designed to suit the store image. Store C's custom detailed designed fixtures exuded African luxury in its shape with dark rich finishes. Store A preferred clean-cut lines, completed with minimalist details to create floating bright lit units and emphasised signage.

Focus Group Observations

Store A was upmarket and minimalist with merchandising fittings and fixtures described by Participant 3. Participant 1 noted that fittings and fixtures were all chrome plated and bespoke with vertical tracking embedded. The track was not visible as the joinery was built to fit around the track, which was seen as great design. Participant 1 further elaborated that Store A relied more on the forward hanging and side by side hanging of merchandise. They did not make use of much flat pack units for the simple purpose that the type of clothing displayed must be viewed to showcase the look. The merchandise hung in full length, neat, tidy and minimally (Refer to Figure 4.38). Participant 2 noted that there were many mirrors integrated throughout the store and in the fitting rooms, at consistent heights for viewing purposes. This spoke the same language throughout for all fittings and fixtures.

Participant 3 noted that Store C's fixtures and fittings were of good quality and considered in great detail. Even the mirrors in the fitting rooms had a bevelled edge. Participant 2 agreed that there was a consistency, with adequate fixtures which spoke the same language to portray a concept. Participant 3 recognised a chrome/stainless steel moveable ladder hanging on the merchandise unit and that the fittings were carefully hidden by solid edges on the shelves front edge. Participant 1 mentioned that a stud and socket system was used for adjusting the shelves. It was more static owing to their displays in relation to the shelves with lights. These lights were hidden inside the timber framing. It was considered by Participant 1 as clever designing in the way their lighting and wiring was hidden in the moulding of the shelf. Participant 4 gave an opinion that their hanging displays were quite standard but the wall fixtures gave the space more character as well as the wooden stumps that they made use of to prop the mannequins on.

Public Domain

Store A is part of the Inditex group, and part of their business model is developing eco-efficient stores. All of the group's stores are built in accordance with the Inditex eco-efficient store manual, which gives technical instructions for electrical installations, HVAC, plumbing, lighting, furniture and waste installations (Inditex, 2014:81). Sustainability is priority in Store A's design of the stores, evident in the environmentally friendly fixtures and fittings as well as the eco-efficient installations that are used for the visual merchandising displays (Café du Cap, 2012).

Apparel grouped to match an outfit together e.g. dress, jacket and shoes

Full height Mirror fixed in corner

Simplistic, White framed, Box shaped corner display unit with black plinth

Front & side hanging apparel display-rod to hang garments on is hidden under white shelf. Black powder coated rods supports the shelf

The frame of the box and height of hidden plinth raises the unit significantly to seem like it floating

Table display floating off the floor using plinth

Black and white contrast 3 tiered table display for folded garments and shoes

Only limited number of garments displayed on each rail

Figure 4.38: Store A Fixtures and Fittings.

(Graziadaily, 2012)
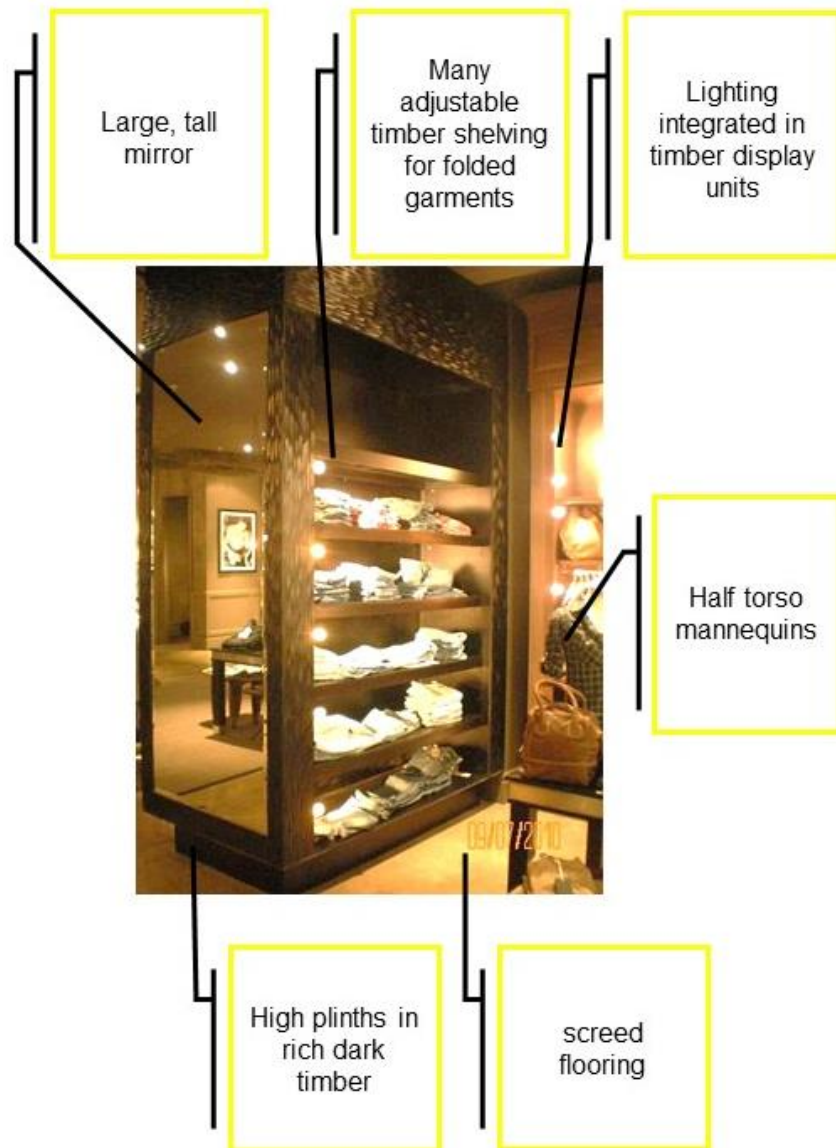
Figure 4.39: Store C Fixtures and fittings.

(Shopdisplay, 2018)

4.4 Store Reputation

As a shopper each local and global brand stores identity is described and compared below. This identifies whether or not the store has developed a unique store image, which portrays a store identity appealing to their target market in order to gain an acknowledgeable and identifiable store reputation.

Middle LSM Store B and D

Personal Observations

Both stores are reputable, situated all over the Western Cape and always filled with customers lured in by their affordable prices and specials. Store B's kids clothing range includes custom print teen style t-shirts, party wear for youth, and active wear for young athletes. It is a very free-spirited brand aimed at a younger crowd.

Store D includes phrases and fun store branding that promotes the store image. They invite younger customers to enjoy the use of their digital tablets to shop online and compare prices situated in the mid to upper LSM category.

Store D is a new addition to the Waterfront and has become quite popular since to their launch in 2014. The V&A Waterfront is quite a large tourist attraction and many customers enjoy shopping at Store D due to the many local fashion designers that have designed limited edition product ranges for them. Store D is a frequented clothing store, who value their customers, and tries to satisfy them through the right price and great fashion variety.

Store B usually caters for a much younger crowd than Store D. Usually, Store D caters for pregnant mothers, children, teens and adults, both men and women. However, this particular Store D caters for a younger clientele, and does not include a kid's section. Store B portrays is raw and exposed, industrial feel in store design which links to their target market. It caters for a care free young teen crowd, selling trendy fashion and fashion basics, which including a kids and active wear range. They want to be recognised as an Australian brand located in South Africa as they have advertised it in store on one their walls in lit up signage lettering, therefore recognising that they are global.

Focus Group Observations

Participant 1 identified Store D as a store that invited middle-to-low income individuals, to have access to a high volume of similar apparel that was mass produced at low quality; easily discarded when damaged rather than seek a tailor. Participant 2 perceived Store D to be solely focused on price and fashion. Participant 2 observed that the products being sold at low costs justified lack of excessive spending on design intervention. Participant 4 described the store identity of Store D as young and upbeat, selling instant fashion and offered low-quality mass-produced garments, even though

high quality was not a characteristic typically attributed to them. By means of changing the store and its finishes, they have begun to signify a change in the perception of their store image and identity. Participant 3 noted that they offered mass produced footwear, accessories, clothing and underwear for a target market aimed between the ages of 14 to 25 years old and that the low quality thereof was an expectation of Store D. Participant 5 noted that Store D was seen as a low-cost store, selling affordable fashion for all ages.

Overall, Participants 5 and 2 highlighted that Store D was all about the price point; selling merchandise at a low cost. Participants 4, 3 and 1 mentioned that this merchandise was mass produced, emphasised by Participant 4 and 2 that Store D wanted high volumes of merchandise in store, rather than spend on store design as selling the merchandise was the focal point. The target market, identified by Participants 4, 3 and 1, was young and catering within a middle-to-low income bracket.

Participant 3 (2017) mentioned how Store D provided a sense of belonging and identity through their in-store signage implementations. They tried to include humour in their signage, as one sign that said: *"No way, oh Yes, that's seriously our price"* (Refer to Figure 4.50). Another sign that said, *"Shop, tweet and share with our free Wi-Fi, it's like seriously free".* The South African culture of people always saying *"Seriously!"* was emphasised in slogans or short phrases in the store which defined Store D as uniquely South African.

Participant 3 described the persona of the customer of Store B to be fresh, fun, open minded and genuine. Elaborating that the men and women's clothing portrayed a trusted, easy living brand, and their quality and honesty gave the sense of comfort. They had more of a homely feel than that of Store D. It was also described by Participant 3 as an industrial loft style home due to the types of finishes and fixtures used. Timber was utilised as horizontal bands, in the ceiling, with criss-cross timber pieces and the walls added a roughness by exposing the brickwork. The design of the store tied in with the participant's perception of a concept of the store. Participant 4 described the design of the store as young, vibrant, fresh and trendy, which also tied in with what she perceived the identity of the store to be. It was noticed by Participant 2 that Store D would target a lower LSM than Store B. Thus, it led Participant 2 to believe that Store B invested more money into their store design.

An example was given by Participant 2 (2017) to explain this viewpoint: "*When you walk in at Store D you look just above your standard height railing on walls, they actually*

*have pricing. Let's say R137 and then they also have demarcations which is signage
where they say this is your denims, they have labelled all of it but then if you go to Store
B right above if it's a denim jeans display they actually have denim jeans and in other
cases they have actually taken the real merchandise, wrapped it around something and
put it in a frame and its actually of the stock that acts as a visual item and at the same
time its demarcating what type of product they actually selling on the floor. I think the
target market and how much you are willing to spend also has an impact on those two
stores"*

Public Domain

Store B caters for a large target market from kids, young teenagers to youth from 18 to
30 years old (UK Essays, 2013). Store D's target customer is the 14 to 25-year-old, but
the merchandise has broader appeal to people with a young, fun and sociable attitude
(Mr Price Group, 2008: 2). They target young and youthful customers, in the 6 – 10
LSM ranges, who love fashion and appreciate exceptional value (Mr Price Group, 2008:
2). *"Store D's purpose is to add value to customers' lives and worth to their partners'
lives, whilst caring for the communities and the environments in which they operate"*
(Mr Price Group, 2014: 5).
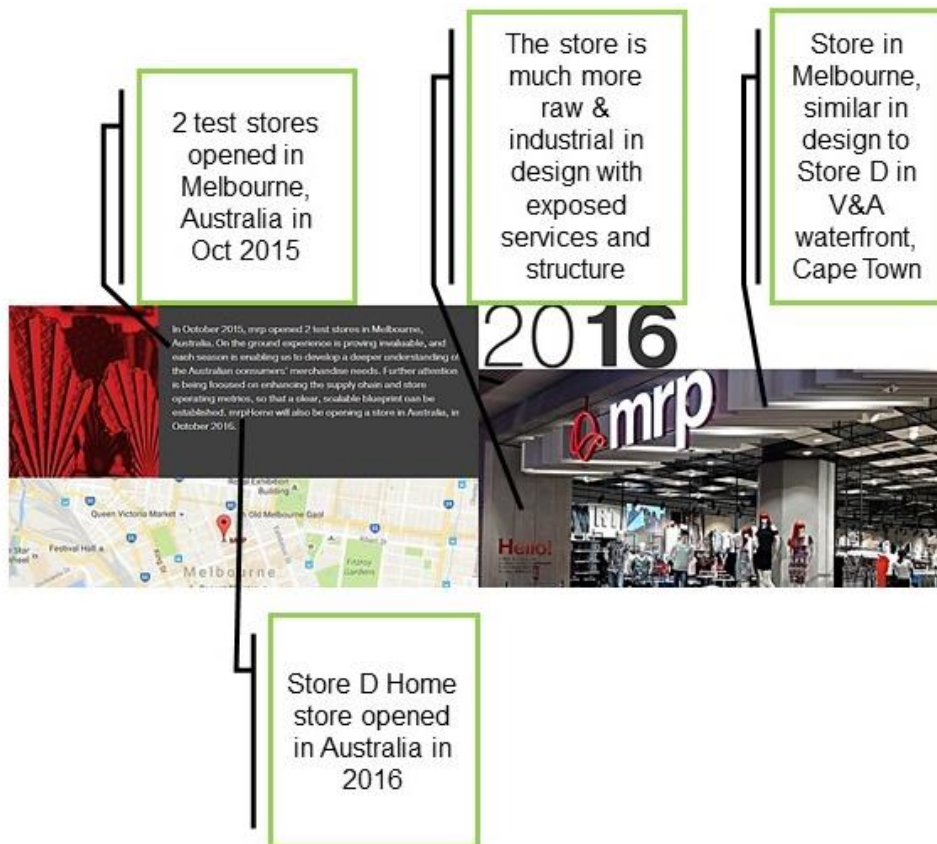
Figure 4.40: Store D has gone international.

(Mrpricegroup, 2018)

High LSM Store A and C

Personal Observations

Store A is a Spanish based brand, catering for the latest catwalk trends at affordable prices and targets a young to family market, as it also has a small kid's clothing range. Store A's high product turnover encouraged customers to visit the stores more frequently and avoids several customers purchasing the same garment to bring exclusivity to their brand. Their overall store identity is simplistic and minimalist in design and colour. They take pride in their store layout to ensure a great experience and have very high security measures in place as well. The concern was with customer service in stores as staff were quite generic in their ways of engagement with the customers.

Store C is a unique South African based brand. Their Nguni logo identified their target market as sophisticated yet contemporary wealthy travellers, who in invest in heritage and luxury (Refer to Figure 4.41). Their stores have spread across South Africa and to the borders of Dubai; Store C in Canal Walk is the only outlet situated in Cape Town. The store created an experience for the customer that went beyond artificial environments to immerse customers in a virtual safari of African spirit. Their brand is considered to be quite strong to survive, as there is one store in each major city in South Africa. The store lived up to its African heritage whilst creating a holistic experience for shoppers. Their store identity was strong and branding consistent, their staff members friendly, their clothing unique and their pricing affordable for its rich quality.

Focus Group Observations

When Store A's identity was discussed the participants had varied opinions. Store A's identity was described by Participant 2 as having a strong link to high end fashion. Where making the use of different materials, on their trading floor, indicated to Participant 2 that their design intervention was of international standards.

Participant 3 described their identity as an international brand selling a wide variety of upmarket clothing, for young and old professionals, but selling a luxury upmarket brand to a mass market consumer environment. The minimalist approach to design, detailing and spaciousness offered the feeling of luxury shopping.

Participant 4 (2017) used the words *"simplicity, class, sophistication and good taste"* to describe Store A's identity. Participant 5 mentioned high end, quality and expensive fashion, offering the latest trends in male, female and children clothing.

Participant 3 mentioned that Store A signage was distinctively more exclusive because should one not have seen the store name; the design of their store façade created a memory embedding identity. They had a milky white glass encompassing their store and framing the store windows with a black outline. Thus, mentioning that if the store name weren't there, one would recognise the store purely from the identity created in the design of the façade. The same did not apply for the other stores. If one removed the signage from Store B and Store D, it would have appeared as a simply glazed shop front as their signage identified their store image.

It was viewed that the high LSM store's identity was easier to describe than the middle LSM store. However, Store A was not viewed as a high LSM store despite it being described as a luxury international brand. Store A was viewed, by Participants 3, 4 and 1, as a mid-priced point lifestyle brand but maintained a consumer base that spanned a wide age group. Participant 1 (2017) described Store A as; *"Mutton dressed as lamb"* as it created an illusion of grandeur and style through the design of the store, although the designer clothing was not of designer quality; the placement of seams was not the same as those of high-quality clothing.

Luxury brands were seen by Participant 3 as complicated, due to the perceived luxury portrayed in the design of the store. It was similarly expressed for Store D, which is a mid-priced point store but rather seen by Participants 1 and 2 as a lower income store due to the design of the store. When I visited the stores and chose them for its LSM, my opinion varied; I priced a plain t-shirt at each of the stores. Store A and Store C's prices were at the same price point. When comparing Store D and Store B, their plain t-shirts were at a similar price point as well. It would seem as though the quality of the garment played an important role as well as the design of the store to create perceived luxury and not so much the income bracket or price of a garment. Participant 3 commented that of the 4 stores she would rather have purchased a t-shirt from Store B or Store C, as the quality of the garment, in her opinion, would last longer than that of Store D and Store A.

A question was probed during the focus group discussion regarding perception and how it is created. I asked whether or not it is the store design that played a role in this. All participants agreed that it was definitely the store design that created a perception of the store brand and that the advertising had minimal influence on its perception.

Participant 2 noted that Store C did not rely on marketing strategies. Participants 1 and 2 had not heard of or visited the store prior. Therefore, the stores reputation was

unknown. However, the store was described as having a very strong identity and presence. The identity of the Store C was described by Participant 4 as high quality for an upmarket South African brand. The interior space, layout and design spoke clearly and effectively through an African identity.

Participant 3 noted that the overall impression provided was upmarket whilst still trying to honour the African heritage. They had many décor items that reflected indigenous elements on display, such as African baskets. Participant 5 also noted that a high-end luxury lifestyle was portrayed in the store's identity through the store design.

Public Domain

Store A is a popular Spanish based brand welcomed by the Inditex Group. Following its inception in 1975, it now operates in 75 countries worldwide; targeting young and price conscious markets with high sensitivity to the latest fashion trends. Store A does not define their target market to segmenting ages or lifestyles, allowing them to reach a much broader market (Harbott, 2011). Within their stores, they cater for 60% of female merchandise, 25% male and 15% kid's products (Harbott, 2011).

Store A is known for its instant runway fashion made accessible for everyone. The focus lies on creating great quality clothing that is highly fashionable, affordable and unique for each customer (Cisneros, 2013). Store A is known due to their international visibility and credibility through their supply chain. They provide fast fashion; items arrive in stores twice weekly. Word spreads fast through word of mouth about Store A's flexible and fast adapting strategies (Cisneros, 2013). Store A makes concerted efforts to find out what their consumer needs are, ensuring that their fast fashion of incredibly quick product development, distribution and affordable pricing is bought quickly by customers before the next batch arrives (Cisneros, 2013).

Figure 4.41: Significance of Store C Nguni Logo.

(Facebook, 2015)

4.4.2 Brand Identity

The store designs were observed and compared to identify whether or not they conveyed the identity of the brand between local and global stores, in the middle and high LSM, in South Africa

Middle LSM Store B and D

Personal Observations

The middle LSM stores catered for young target markets. Both stores provided a wide variety of merchandise for their target market. It was clear in their store interior, that the merchandise is a focal point as the store was filled to its capacity with apparel. The apparel sold was trendy and fashionable, which appealed to their target market. Store D communicated a brand identity of "price" rather than quality to their customers. This reassured customers through very clear, bold signage and graphics; that their apparel was sold at affordable prices. However, this did not reassure customers that the

affordable price guaranteed quality. The brand identity was distinctive through the use of signage and graphic implementation but not design intervention. Tangible design elements were present. Not all aspects of design were fully considered, such as the intangible design elements to create a fully encompassed customer experience. Customers were not able to fully engage with the brand as it did not appeal to the senses. There was definite visual appeal through graphics and signage, but spatial design dynamics caused discomfort in certain areas of the store.

Store B communicated a brand identity which was relaxed and exposed. This was seen through the use of exposed finishes through the structure of the store. However, they chose to be very gender specific in finishes such as the use of lighter finishes for ladies, darker finishes for men, and brighter finishes for kids. They housed many brands under one umbrella thus used these finishes to distinguish them. Their implementation of various finishes, to demarcate spaces, communicated the wide variety of merchandise extended to their large target market. The use of graphics also communicated their target market, encouraging customers to identify with the brand. The quality of the product was promoted, through the merchandise, as part of their visual mechanising displays, which reinforced their brand identity and customers could engage with the product. The store definitely appealed to tangible elements of design, but lacked in evoking the senses. Engagement with the merchandise and finishes were promoted, but lacked in promoting a particular aroma. Their music engaged with the target market, but it was not suitable to all customers who visit the store. The brand identity, of both stores, was not fully considered. It was clear that the stores tried to implement design but Store D portrayed a more low-cost image than that of Store B. There were significant amounts of similar elements that were unified into whole systems than disparate elements to make up a unique brand identity.

Focus Group Observations

Participant 1 noted that there were large quantities of merchandise in store in lieu of quality. The style of the clothing and the patterns used, were lacking the finesse of designer clothing. This was evident in the limited variation offered in the pants section, the position of the seams on the knitwear and the unevenness of seams on dresses. The idea was to appear good, while not having to spend a fortune. The merchandise was described by Participant 3 as safe, but trendy fashion, sold for 14 to 25-year olds in a wide selection of colours. Participant 2 noticed that Store D focused on current fashion trends, locally and internationally, although the merchandise may not have been of great quality it was still fashionable and matched international standards. However, the physical environment was not as fashionable as the product. Participant

3 added that there were insufficient large mirrors within the store and insufficient breathing space, or blank wall spaces, to accommodate for extra store conveniences. Participant 4 viewed Store D's brand identity more positively as she thought that this particular store was an upgrade from how the store was known previously. They were still instant fashion and mass produced but they were introducing a certain quality from their products and this further translated into their interior design of the stores.

The general opinion, of Store B based on the in-store observations by Participant 2, was the striking of balance between the merchandise, being the product, and the environment in which the well-priced product was sold. There were elements introduced within their store design that were standard on the retail market but the welcoming atmosphere created made them great competitors. Participant 3 identified that Store B was clearly marked as an international brand, in store, as the international brand appeal was identified in one of Store B's graphics. They showed all the countries that they were located in, such as Abu Dhabi, Dubai, Singapore and Australia. They delivered on trend basics which were followed through in the store design. The quality of the brand was better than Store D; according to participants. The interior was described as an industrial loft styled space with touches of homeliness due to the various framed photos and attention to detail.

Participant 3 felt that this created a connected human-centred environment for customers to enjoy. Participant 4 really enjoyed the simplicity of the store, as they had so many things in their store. The concept and brand were strong and it was well carried through into the finishes as well as signage and typography. Participant 1 also mentioned that Store B was a pleasant store with a definite casual clothing market. She agreed that the brand was known for its simplistic clothing design and this was followed through in the design of the store. Participant 5 noted that Store B delivered valued fashion and quality, basic-designed to exceed customers' expectations.

Public Domain

Store B's presentation was persistently monitored to ensure that the stores high standards set will be met and maintained (UK Essays, 2013). Store B featured a relaxed style with modern on-trend updates within its store interiors (Chain Store Age, 2014).

"*Each Store B Interior starts off with a clean base with a mix of brick, wood and concrete finishes, which allows visual-merchandisers to set-up spaces to be dominant, bold, confident and colourful*" (Chain Store Age, 2014). Store B has been using the same

type of finishes for years and this has become a backdrop to all Store B stores. *"Store B's corporate image is represented by a high standard of visual merchandising."* (UK Essays, 2013).

The Store D had a team who worked with international store innovators Dalziel and Pow, a UK design consultancy, who helped create a high fashion store feel and sustainable interior to enhance the shopping experience and exceed customer expectations. New brand identity changes took place in in-store graphic communications and signage to create unique brand positioning whilst still maintaining an individual character (Dalziel and Pow, 2012).

Each is differentiated by variations on 'scale, change in pace, and sensitivity to materials and colour palette', according to the consultancy. The apparel stores would focus on its 'casual and fun attitude' holistically delivering the Store D personality (Design Week, 2011).

Both stores were situated in prime locations within the V&A Waterfront Mall. Store D situated at 146A on the ground floor, which was spotted immediately due to its very vibrant facade with a slanted corner entrance. Store B was situated around the corner of Store D, immediately next door. Despite Store D's entrance being well located, the store was much smaller than Store B. Store D's stats indicated that there were over 400 apparel stores in South Africa with the average size of the stores being 632m^2 (Mr Price Group, 2014: 16).

Store B, 146B on the ground floor, was one of the largest retail stores within the V&A Waterfront. There were escalators, stairs, ATMs and an interactive information board in close proximity to both Store D and Store B stores. The mall living quarters, with harbour life backdrop, created great business opportunities for both store outlets. South Africa is its fastest growing market of the 17 countries in which Store B operates (Moorad, 2014). Store B had a unique approach to expansion as they focused on opening stores in smaller cities or outside major shopping districts as opposed to establishing large flagships in big markets (Chain Store Age, 2014).

High LSM Store A and C

Personal Observations

Location played a large factor for Store A, especially within international markets. Store C was located in the Canal Walk mall and Store A was located in V&A Waterfront. The V&A Waterfront was considered to be a tourist mall situated within the CBD and Canal

Walk mall was situated within a business district in the northern suburbs. Store C could blend in well, in a mall such as the V&A Waterfront, due to its branding as an African luxury brand which may have appealed to tourists. However, the V&A Waterfront was filled with many African brand-based stores, or African craft designed stores, which could create a starving competitive market for Store C. Store A, being an International brand, was already well renowned in its name and able to survive in any mall due to its brand status.

Store A occupied a prominent location on the ground floor within the V&A Waterfront Mall. It was easy to spot the store as it was one of the largest stores in the mall. The store was situated within close proximity to toilets, escalators, staircases, ATMs and an information desk. Store A was situated within the same area as other high-end luxury brands aligned with their LSM. The mall also had living quarters which allowed for great business from residence.

Store A's brand identity was consistent throughout their store design. They had implemented a simplistic and minimalistic formula to store design and layout. Everything was structured purposefully for ease of navigation and providing customers with an array of choices in product. They produced a store layout that showed off these choices. The display units were distinctively designed to form u-shaped bays in which customers could feel as though they were shopping privately. The store was very large in size, therefore the structural layout created exclusivity, as well as the limited number of garments on display which were paired with specific apparel to formulate style solutions for the customer. The store colours were neutral, only having used black, white and grey. The minimal use of colour for store design elements, created greater engagement with the merchandise as the merchandise stood out against a neutral backdrop. Thus, having reinforced their brand focus to their good quality merchandise.

Store C occupied number 548 on the upper level. It was situated close by other upmarket stores and well-known jewellery outlets. Canal Walk mall had living quarters surrounding it, which attracted many customers to increase business. Store C was a local branded store; however, it also located itself internationally in Dubai. In South Africa they were quite exclusive in location as there was only one store in each province. There signage and store design indicated that they were an African Luxury brand. The store design communicated a high quality in product and service and the merchandise itself also expressed individuality. Each garment was uniquely designed with embellishments, hand sewn details and graphics. There was only a limited amount displayed in store which promoted exclusivity. There was distinctive graphic imagery

and signage incorporated in store, such as the Nguni logo which was emphasised on the façade, and instore by the point of sales, fitting rooms and printed on the garments. The graphics displayed in store, spoke to the identity of the brand as portrayed models wore the merchandise with backdrops showing the outdoors, similar to being on an outdoor safari. The emphasis of their brand identity was portrayed in many design aspects throughout the store, not only tangibly but also influencing the senses through the scent that filled the air, which was their own unique fragrance, designed for male and female customers. In this way, you could navigate through the store and experience exclusivity in the merchandise and be engaged in a distinct store experience, thus reassuring customers of the quality of the brand.

Focus Group Observations

Participant 2 felt that Store A's shopping environment was perceived to be classy and simple. The items being sold were not overpowered by the fixtures and store design. It was quite a good brand, very competitive with current luxury brands. They were doing considerably well with a new brand addition to the South African market. Participant 3 mentioned that there was definitely a connection in Store A because their merchandising units were minimalist and sleek and it was felt that their store identity represented this as well. It was also perceived as a medium-priced lifestyle brand rather than a luxury brand it was advertised to be. They maintained a consumer base that spanned a wide age group and socio-economic group. Participant 4 appreciated the monochromatic aesthetic of the store. The clean lines were a good feature, mentioning that some may have found it too clinical, but for the concept that they want to promote, it worked successfully. Participant 5 did not enjoy his in store experience, having mentioned that the staff had a certain air about them; only assisting customers who, in their own opinion, could not afford the brand.

Participant 3 stated that Store C captured the spirit of adventure and spirit of Africa; a safari-type feel with a target market possibly between 25 to 55-year olds. The atmosphere was described by Participant 2 as vintage, formal and royal. However, the expectation, perceived by the store design, did not reflect the same luxury in the store merchandise. The merchandise on sale was of great quality, however, it was not consistent with the store image. Participant 4 noted that there was a high level of sophistication in Store C and the quality of the merchandise was evident in the design of the store. The dark colours, and use of timber, added to the ambience of the space, which made it a successful design in relation to the message they wanted to convey. Participant 1 noted that this brand was seemingly unknown and the shop fitting did not sell the brand. Rather, it relied heavy on the image of the whole aesthetic appearance

to carry the brand; it was an experience rather than devices for placement of stock. Participant 5 identified the brand as expensive and overpriced, it did however provide a well-designed space. At the time of visiting however, there were no customers in store besides himself.

Participant 3 (2017) mentioned that all store designs definitely conveyed the identity of their brand. She said: *"What you see is what you get."* When you see luxury, the clothing fitted that image. Price and quality aside; the look, trend and feel of the clothes matched the look, trend and feel of the store, there was nothing mismatched. Participant 4 elaborated that it came through from the tiniest detail, through the concept with the hooks, the display of the merchandise and what you received in the senses which definitely played a part in your overall experience. The kind of impression that you got; it was not just about the visual and tangible, but also through the senses.

Public Domain

Store A standardised the key strategic elements of their stores, namely the location, window display, interior design, store layout, store display rotation, customer service, information systems and logistics. The shop window displays and interior design was already decided upon beforehand and then replicated in all international shops by professional store decorators (Lopez and Fan, 2009:293).

Store A was positioned in key locations based on an analysis of the local market environment. It helped identify niche product opportunities in its' relative market, against the prices of competitor's products to attain maximum profitability (Lopez and Fan, 2009:293). Store A became more determined and intent on increasing global expansion following the experience gained in an international environment (Lopez and Fan, 2009:288).

4.5   Merchandise
4.5.1   Style

The merchandise style is described below and explained whether or not there is a linkage to the store identity

4.5.1.1 MERCHANDISE STYLE VS STORE IDENTITY

Middle LSM Store B and D

Personal Observations

Store D generally had many varieties in styles, accommodating for pregnant women, working women and plus size women and offered current trend clothing, intimate wear, shoes and accessories. Store D's merchandise had a broader appeal to a young and sociable market, who appreciated trendy fashion at exceptional value. Local fashion designers designed limited edition product ranges for them (Refer to Figure 4.42). Store D created pop-up stores around the Western Cape, in which they used to advertise these limited-edition apparel ranges. The pop-up stores' design portrayed the image of the prints, words or colours used on the merchandise. They used the design and style of the apparel to lure in a specific target market. In this way they aimed to include their own exclusivity in pop-up stores rather than their main stores. As it promoted special edition apparel ranges for short periods. The limited ranges were artistic, young and fun, relating back to the store identity (Refer to Figure 4.43).

Store B had a kid's clothing range, custom print teen style t-shirts, party wear for youth, and active wear for young athletes. The menswear had a masculine appeal for the contemporary urban male figure. The ladies wear had a more feminine approach with a combination of fashion basics to high trend garments for every day wear. The style of the apparel fitted the design approach to the store's identity. Each section was designed differently, in the same way that the apparel was offered in various styles and product ranges. To appeal to the masculine style of the men's apparel, darker colours were used to define this area in store design; dark timbers, concrete and raw steel were used. Feminine style of the female apparel was portrayed in lighter and softer finishes, such as pink colour shades, lighter timbers and white displays and walls. This referred to gender norms that were common so that customers could identify with the merchandise and the store image.

Focus Group Observations

Participant 2 felt that Store D's merchandise related to the concept of the store and identity thereof; the products sold were of a low price but fashionable. As mentioned previously, Participant 2 viewed that not as much money went into the design of the store. The focal point was purely to sell as much merchandise as possible to make a significant profit. Participant 3 noted that standard merchandising units were utilised to sell merchandise that had a strong fashionable element at an affordable price. Adding that the store identity was simple, cost effective with no frills in appearance, catering

for a young and vibrant market. Participant 1 felt that there was a match between the quality of the mass-produced clothing items and the mass-produced modular units used to display the clothing. Participant 4 mentioned that this specific store was more thought through, compared to other outlets visited. The layout and finishes gave it a good overall aesthetic, merchandise was being displayed in interesting and fun ways which tied in with their youthful concept. Only Participant 4 appreciated the aesthetic, whereas the other participants' focus was on the display units and how standard they were in design, leaning towards a design that was more cost effective. Overall, all participants recognised a link between the merchandise and the store identity, but that the fashion was the focus and not the design.

Store B was perceived by Participant 2 to be all about fashion quality and style. Participant 2 observed that the merchandise had reflected the general reputation of the retailer as the use of different material on their trading floor and the design intervention was of international standard. Participant 2 noted that Store B's products were also of reasonable price. There were elements of design intervention, to a certain extent, which related to the merchandise. Participant 1 noted her unfamiliarity with the brand as they do not carry her size. She did however notice that the children's clothing was free from Disney influences, which made them better for people who want to avoid branded kids clothing. Most of the clothing were in line with the trend of wardrobing (buying a classic item that you could add to your existing mix at home, free from flashy add-ons). This store was about selling clothing in line with a certain understated life style. The merchandise was in line with the lifestyle cues on display. Participant 3 described the merchandise sold as casual wear with trendy fashion for men, women and children, plus home décor items made using natural fabrics. The store identity was described by Participant 3 as easy living, homey, and design style as an industrial loft feel. Participant 4 identified the merchandise display unit's style as standard with timber finishes used to add warmth, but simple enough not to seem plain. Overall, the merchandise did reflect the general style of the store and suited the target market.

Public Domain

Store D's specialist trend teams did extensive fashion research through frequent international travel. Store D engaged in active dialogue through digital and social media. Store D satisfied their customers' needs for fashion by clearing out slow selling merchandise and made way for new fresh trends that customers responded to. These products were always tested before making large merchandise orders (Mr Price Group, 2014: 15). Store D had a retail selection of own sub-brands along with designer collaborations. Assortments were differentiated and category-dominant in the wanted

fashion items of the season (Mr Price Group, 2008: 2). There was the Oakridge brand which consisted of timeless pieces to dress up for work and dress down for the weekend such as denims, casual wear, formal wear and maternity wear. The RT range, consisted of denims, formal wear and casual wear. The RED range, was inspired by the outdoors; focusing on relaxed, laidback layers and authentic details to create adventure-ready casual wear; the REDX range was only active wear. The trend and product design teams brought up-to-date, fashionable merchandise to the market at everyday low prices (Mr Price Group, 2008: 2). Nicci Lyne, Managing Director of Store D Apparel said that "*Store D is a leading fashion value retailer that provides an inspired range of differentiated, on-trend clothing, intimate wear, shoes and accessories offering distinctive and market-leading value*" (Mr Price Group, 2014: 35).

Store B's products reflected the Australian lifestyle; offering the latest on-trend styles that everyone wanted, at an accessible price point (Chain Store Age, 2014). Store B was a larger than life, vibrant retail giant that was astounding the local and international retail scene. It was famous for fast-paced and fun-fashion, including affordable cutting-edge street wear for both males and females (UK Essays, 2013). Store B has collaborated with Disney, Cartoon Network and Dutch Artist (Dick Bruna whom created 'Miffy', the popular character in children's books) to create beautiful graphics that were incorporated with a wide variety of casual wear such t-shirts, hoodies, jackets and denims (UK Essays, 2013). Focusing on innovative artwork and styling created a unique yet highly commercial garment (ACRF, 2014). The menswear had a masculine appeal for the contemporary urban male figure. The ladies wear had a more feminine approach with a combination of fashion basics to high trend garments for every day wear (ACRF, 2014).

Store B had individual product ranges which they produced through their design teams and then advertised in store, ensuring that they were constantly up to date with the latest fashion trends. Store B had successfully expanded their branch into sleepwear, undergarments and active wear with their Body range, footwear with Rubi shoes, children's apparels with Kids store brand range, and stationary and gifts with Typo (UK Essays, 2013). The Design, Graphic and Merchandising Teams travelled broadly overseas to do extensive research about the moving market. They focused on fashion direction and product performance. They utilised the inspiration derived to create the look and feel for each season's merchandise (ACRF, 2014). Depending on the category, products were designed by a team of more than 60 designers and trend forecasters; there was a turnaround time between design and manufacture of two to eight weeks. There were product range reviews that were conducted for each brand

every quarter (Mitchell, 2015). New products were delivered to stores daily and new ranges arrived each week (Mitchell, 2015). Products were manufactured by 170 suppliers at 330 factories. They were mainly situated in China and Bangladesh, sent by sea freight to seven distribution centres in Melbourne, Brisbane, South Africa, China, Singapore, California and New Zealand (Mitchell, 2015).

Figure 4.42: Store D supporting the local manufacturing and fashion design industry.

(Emmajanenation, 2014)

Figure 4.43: Store D pop up store in Long Street, Cape Town.

(Tsaagane, 2015)

High LSM Store A and C

Personal Observations

Both stores represented a specific type of style and identity which matched the merchandise style and identity. Store A had a larger store area than that of Store C. Hence, more space for a larger variety of merchandise; Store A accommodated for male, female and kid's merchandise. Store C did not accommodate for kids and had a very limited shoe range. Both Store A and Store C had store branded fragrances; Store C had a male, female and unisex branded fragrance and Store A had a kid's, female and male fragrance range.

Majority of the merchandise in Store A catered for females, including a smaller variety for men and kid's merchandise. There was a large variety of clothing: formal wear, accessories, casual wear but only a limited number of garments were displayed, in a limited amount of sizes to create exclusivity.

Store A was all about fast fashion, their merchandise was grouped together according to the style of the garment, such as casual or formal wear, and garment sets were grouped together, such as formal pants with blazer and shirt. Items were matched in order to lure the customer to buy two items instead of only one. It became more enticing to make purchases of two instead of one, as items were limited according to the number and size displayed (Refer to Figure 4.44).

Store C offered sophisticated, yet contemporary, casual and formal apparel and footwear wear for both male and females. Menswear consisted of shirts, blazers, jeans, shorts, sweaters and casual jackets. Accessories consisted of casual and formal shoes, hats and bags. The range of footwear was limited for both genders but of great quality such as genuine leathers (Refer to Figures 4.45, 4.46, 4.47 and 4.48). A unique store atmosphere was created by the aromas of the female, male and unisex branded fragrances, with these fragrances displayed in store as well.

Store C's style and identity was strongly represented in the merchandise through their unique logo repetition on garments in the form of hand beading, embellishments, graphic prints and embroidery, thus uniquely designed for a specific target market (Refer to Figures 4.45, 4.46, 4.47 and 4.48). It was not about the latest trends but more about comfort and the outdoors. Only a few garments were made per design. Items were mixed and matched in combinations that were appealing to the customers on display units, either hanging or folded. Their unique logo was emphasised on all clothing in store, behind the point of sales, in the fitting rooms and on their shopfront. That indicated that there was a definite link between the merchandise and the store identity.

Focus Group Observations

According to Participant 2, Store C's merchandise style and store design was not suited for one another. From the brand name and interior design, he expected the product to be more formal and vintage. However, it was more casual which did not tie up with the stores image. A comment was made by Participant 2 that the merchandise looked the same throughout. There were no lifestyle demarcations to acknowledge what was casual wear and what was semi-formal wear. All the t-shirts had a print on them,

repeatedly using the brand logo and name on all garments. Participant 3 described the merchandise as casual and classic. The casual range was seen as items that one would wear to work and the classic range was more timeless; pieces that would be kept longer than the casual t-shirts. The t-shirt print was identified as a goat or cow by Participants 4 and 2. According to Participant 4, the formal shirts were more understated and this created a balance. Most participant's preferred garments that were not heavily branded, especially for the middle-income stores. Participant 1 was more enthralled by all the other design details in the store than the merchandise on sale.

Participant 3 mentioned that Store C was quite new in the market as they only opened in Canal Walk in May 2010.Participant 4 spoke to one of the sales assistants at Store C and found it interesting that there was only one outlet in Cape Town. Their other stores were in Durban, Abu Dhabi and Dubai. Therefore, they had an exclusivity of being the only outlet in the Western Cape as opposed to the other stores visited. In this way it was above Store A, because one could find more of their outlets than Store C. Store B and Store D is located in various malls in Cape Town and throughout South Africa.

Overall, the design of the Store C was well executed. Participant 4 described their store identity and clothing identity as African safari without being kitsch. The amalgamation of the upmarket merchandise style and store identity was done successfully. Participant 3 mentioned that the clothing did have an element of their store design but in a more casual approach compared to the luxurious store design. The fabrics used for the garments were of earthy and natural tones, and the store identity was consistent with this also described as African Safari.

Participant 2 noted that the visual display of merchandise for Store A had all the items one would require across all lifestyle clothing's, genders and departments. Participant 1 mentioned that the style of the clothing was more work wear, for the formal sector, and relied heavily on the middle-class office worker for clientele. The clothing could be considered suitable for casual wear but not everyday leisure wear. Participant 3 elaborated that there was definitely a connection seen in Store A, between the store design versus the products sold, as their merchandising units were minimalist and sleek; similar to the store identity and their clothing designed for the young professional and the older professional, but not something one would wear to the beach. Participant 4 agreed with this statement. She mentioned that the style was almost couture because

they change their stock often; it provided an idea of exclusivity at an affordable price and this tied in with the simplistic style of the store identity.

Participant 3 (2017) found Store A, B, C and D's store design and style to be quite conservative and restrained even in the colour choices and patterns seen. She called it *"safe"* clothing because 3 years down the line she could still be wearing it. Whereas, high end brands like, Dolce and Gabbana have window displays which she has seen with explosions of colour, *"It's like you have been into a candy land with all the little bling's."* It was considered seasonal garments that were beyond wacky and bold. One would be brave to wear them, but only for one season before replacement. Even a very high-end brand such as Gucci, were very explorative in terms of their shoes. *"They would put spring blossoms on the men's shoes with splashes of pink colour or a little puma. These high-end brands are adventurous, fun and jovial in some of their items whereas all these stores looked at are relatively conservative and safe. They can stay in your wardrobe for a long time and no one is going to look at you weirdly when you walk down the street."*

Public Domain

Style and inspiration were drawn from the catwalk to the store, in the fastest time, to capture the latest trends and brought to the market as quickly as possible (Zhenxiang and Lijie, 2011:195). Store A created two basic collections each year which were phased in seasonally. Store A had a team of designers who attended trade fairs, fashion shows and refer to catalogues of luxury brand collections for inspiration. They developed sketches for each collection, close to 9 months before the start of season it was released in. Designers also chose accessories that complemented each collection (Ghemawat and Nueno, 2006: 10). Products for the current season were worked on by the creative teams, who created constant variation, to expand on successful items and constant in-season development toward the following season. There was a creative team which consisted of designers, sourcing specialists, and product development personnel representing each of Store A's three product lines for women, men, and children (Ghemawat and Nueno, 2006: 10). Garments were made according to the latest trends and fabrics and the most appropriate designs for the season (Bitfoundry and Trennery, 2014). Consideration for the fabrics and product mix was done for the following year for initial collection implementation (Ghemawat and Nueno, 2006: 10).

There was constant variation in Store A as new designs were created and new merchandise delivered to stores twice a week (Bitfoundry and Trennery, 2014). Store A's collections offered assortments of designer-style garments and accessories such

shoes, bags, scarves, jewellery, and recently added toiletries and cosmetics (Ghemawat and Nueno, 2006:12).

Store C was a modern-day clothing and footwear store that captured the spirit of adventure and the luxury of growing up in Africa (Facebook, 2015). Menswear ranged from the rugged travel wear, such as chino's and shorts in safari inspired colour palettes. Contrasting the rugged feel of the menswear was softer ladies' apparel, consisting of flirty dresses, sheer blouses, feminine cotton camisoles and soft t-shirts with intricate embellishments and hand rendered prints, pants, jeans, shorts, skirts, and formal and casual jackets (Emaar Malls, 2012).

Simplistic fixtures and finishes: Mirrors are framed using same steel and placed on structural columns to hide them

Organised Layout and organised merchandise: Each individual display unit fits in alignment with the display unit behind it

Minimalist Displays: Glass used for tall units as divider with powder coated black/dark grey steel framework.

Store Quality Consistency in materials & finishes: Mirror and display unit framework matches each other

Everything is strategically placed and has a purpose in design and style

Apparel is grouped together eg, jeans with shirt and shoes to entice customers

The clothing becomes a focal point due to the neutral base colours of white and grey

Simplicity in the way front hanging displays are aligned and number of garments on each neatly hung

Figure 4.44: Store A Merchandise Style VS Store Identity.

(Graziadaily, 2012)
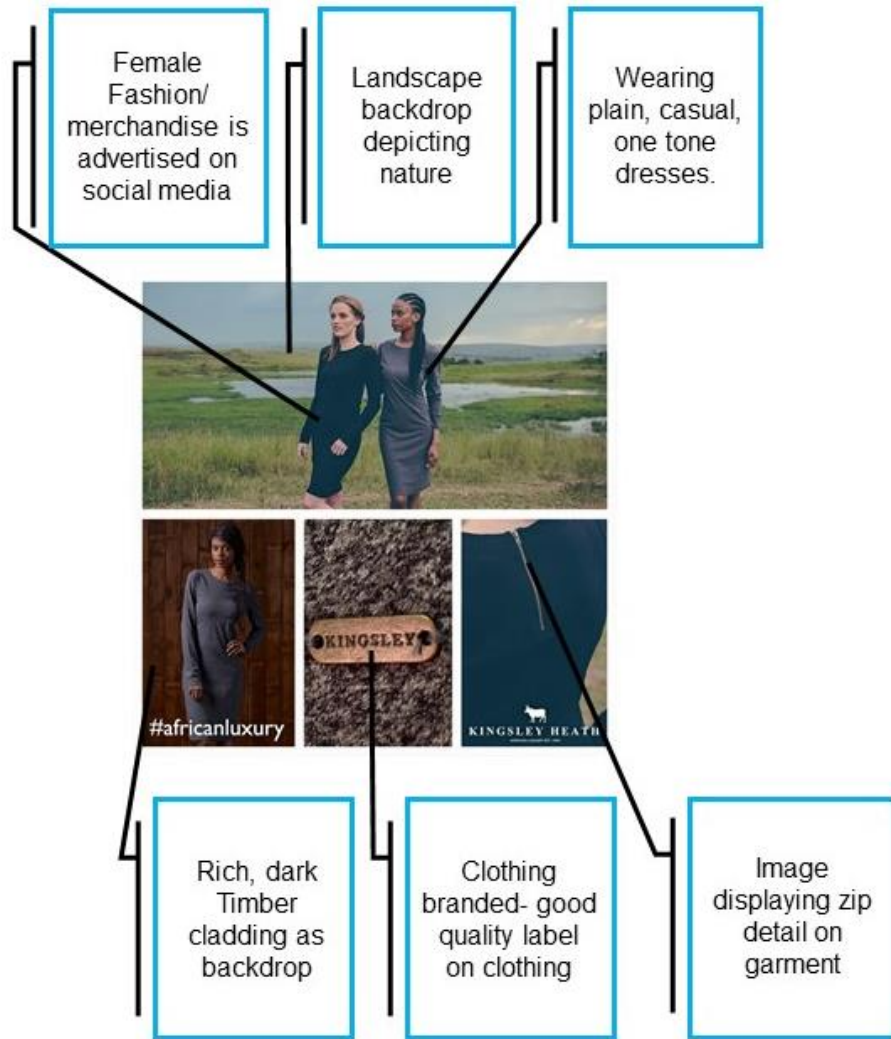
Figure 4.45: Store C Female Apparel style and details.
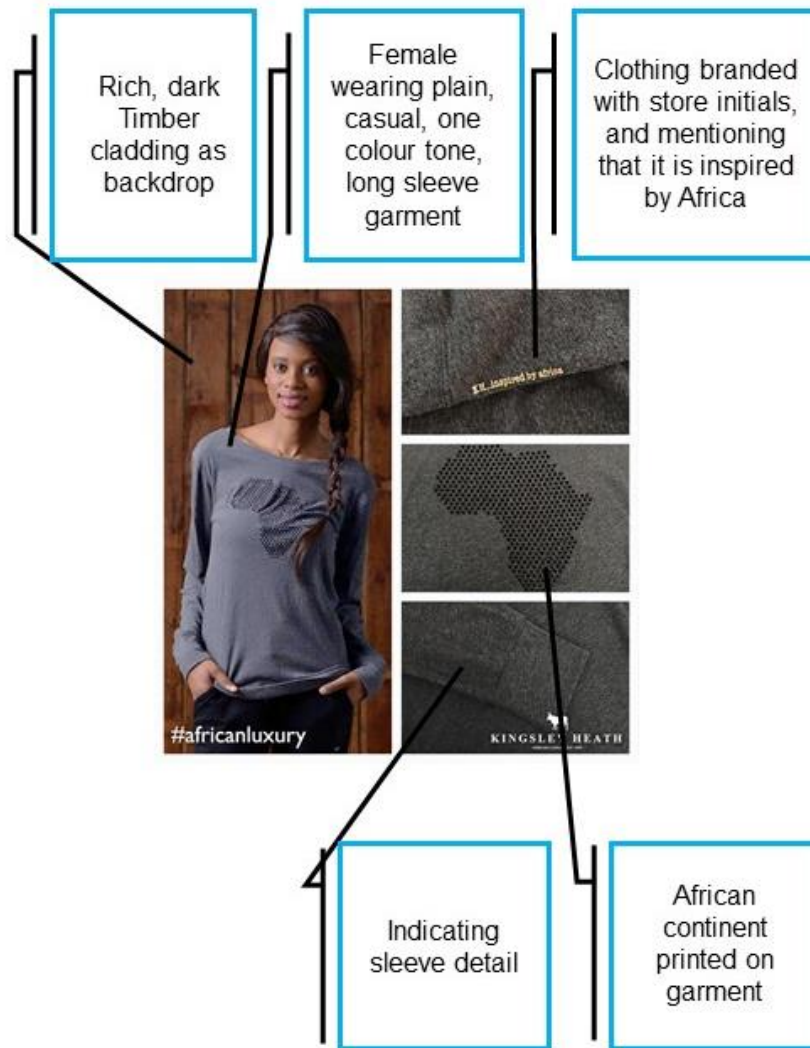
(Facebook, 2015)

Figure 4.46: Store C Female Apparel style and details.
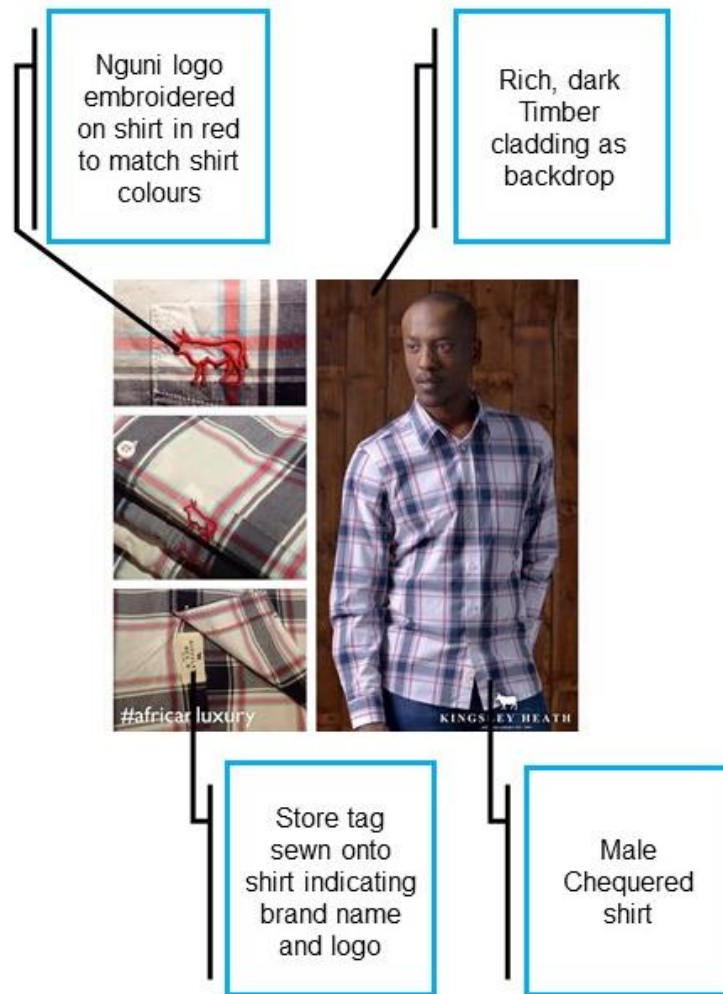
(Facebook, 2015)

Figure 4.47: Store C Male Apparel style and details.
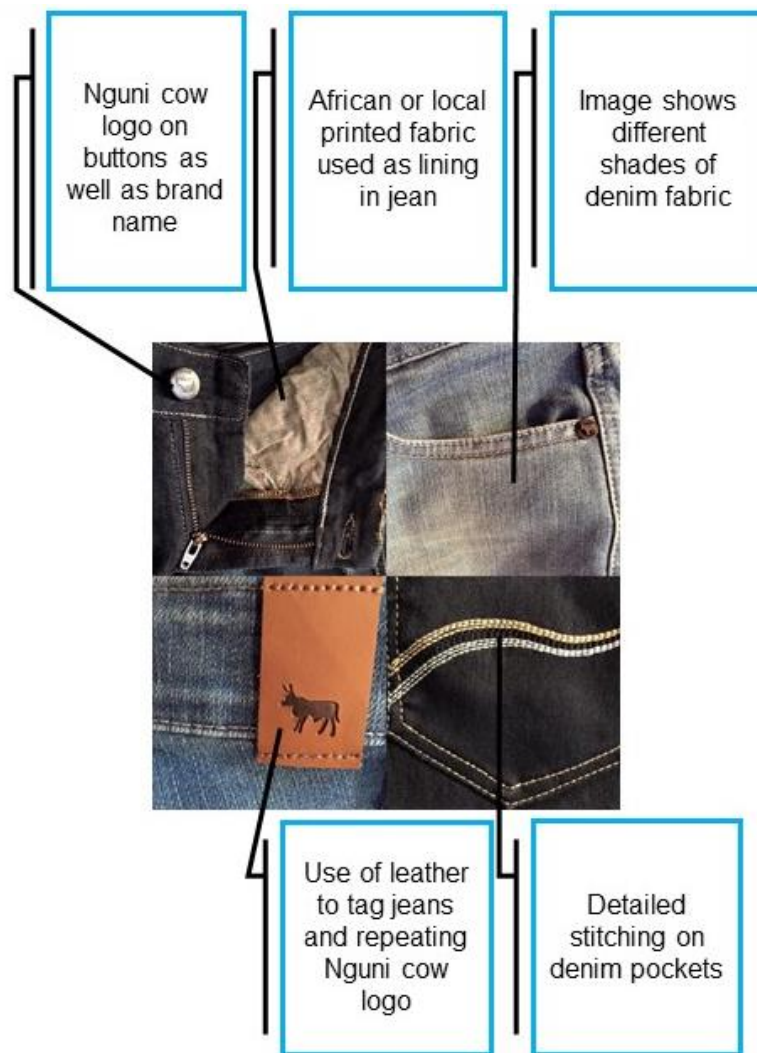
(Facebook, 2015)

Figure 4.48: Store C Male Apparel style and details.

(Facebook, 2015)

4.5.2   Quality

The perception of the quality of the merchandise, in relation to the store image, was elaborated below; according to local and global brand stores categorised in the middle LSM bracket in South Africa.

4.5.2.1 DEPENDABLE MERCHANDISE

Middle LSM Store B and D
Personal Observations

Store B and Store D valued their customers and tried to satisfy them through affordable prices and great fashion variety. There were large amounts of stock in both stores, for customers to obtain apparel in a variety of styles and various sizes.

Focus Group Observations

Views varied on how dependable the merchandise was for Store B; Participants 1 and 4 mentioned that they would shop there. Participant 1 noted that Store B sold dependable merchandise, using quality merchandise fabrics. The items sold were mass produced, but the quality of the fabric remained their selling point. Participants 3 and 2 having agreed that a garment would only last for 2 to 3 years. Given the target market, it was mentioned by Participant 2 that one would not want to wear the item for longer than 2 years though.

Participant 1 noted that Store D's merchandise was dependable, in terms of sourcing the same items at other store branches. If one required an item, which would be worn for a once off event, then Store D would have been ideal. Participant 2 mentioned that there was risk when purchasing from Store D, as many customers would have bought the same garment, thereby reducing exclusivity.

High LSM Store A and C

Personal Observations

Both stores merchandise was dependable. Store A was always current with the latest trends, made by utilising good quality fabric and have constantly changed fashion rather than store design. Store C paid great attention to detail for each garment in handcrafted beauty. Both stores provided an element of exclusivity as they did not display large amounts of stock of a particular garment, reducing the chances for another customer to be seen in the same outfit. Store C branded their garments with their logo and brand name, this indicates that they were proud of their merchandise and their store brand. They wanted more customers to depend on their high-quality merchandise and become brand loyal.

Focus Group Observations

Participant 2 described Store A's merchandise as exclusive, as the chance of another customer purchasing the same garment was quite low due to the number of garments displayed on each rail. The chances of another customer wearing a garment from Store D was much higher, as each garment was sold in abundance. Participant 3 noted that she found Store A and C's merchandise dependable.

Participant 1 mentioned that placement also played a vital role, in the exclusivity and perceived quality of the brand, as Store A has placed itself in a different type of mall compared to Store D and Store B which were found at most malls in the Western Cape. One could easily find an outlet of Store D in a rural area, but none of Store A. Store A

teamed up with much larger malls such as V&A Waterfront and Tygervalley. Thus, placing themselves not only in relation to what they offer but also in-line with their target market income shoppers' bracket.

Participant 4 questioned her friend, for opinions about Store A, as she had personally never shopped there before. Store A relied heavily on word of mouth advertising, instead of in store advertising, and her experience of hearing about Store A was always described as a high-end store. After visiting the store, she found that it was more affordable than expected. Some items were priced at a higher margin to others but overall it was not as high end as described by others she had spoken to. The minimalist approach to the store design provided a strong sense of luxury or couture, which strengthened their approach to changing their garments every two weeks. Again, this added to the reasons why store design could create a different perception of a brand than what it truly was. Participant 4 mentioned that the quality of the garments further motivated the design of the store. Store C portrayed a sense of pride in the design and quality of their store including their garments on offer. Their location also played a vital role in creating exclusivity of the brand, being the only store in the Western Cape.

4.5.2.2 GOOD QUALITY MERCHANDISE

Middle LSM Store B and D

Personal Observations

Store B offered a better guaranteed quality than Store D. Store D's garments often faded quickly; buttons fell off newly bought garments or threads unravelled when washed. Store B produced good quality garments, especially in denims and knitwear, but therefore marketed at a higher price due to the quality. Store D's quality differed depending on the range. Example: The Oakridge range was pricier thus offered better quality than an item in the RED range.

Focus Group Observations

Participant 1 mentioned that there was definitely a match between the quality of the mass-produced clothing items of Store D and the mass-produced modular units used to display the clothing. Due to their lower quality, Store D was considered an ideal store to look for an item that would be bought for a once off event, as previously mentioned by Participant 1.

Participant 3 mentioned that Store D was responsive to current fashion trends. The quality of the store and merchandise was satisfactory, as certain items appeared to be

of poor quality, such as the shoes, and the store required maintenance due to damaged units and floor tiles. Participant 2 identified that the merchandise quality was in line with their store design. The products were sold at a low price, yet fashionable, which justified lack of investment into store design.

Store B was described as the opposite in trendy fashion. Participant 1 mentioned that Store B was not trend slaves, as they had stylish and good quality clothing. One would be able to add certain items to your wardrobe that would last a lot longer due to the simplistic nature of the garments sold. If one was looking to extend one's wardrobe, or purchase reliable items that would last longer, then Store B would have been the preference for Participant A. The quality of the fabric, in Participant 1's opinion, was their selling point as they avoided polymer mixes to have a feel of natural fabrics. Participant 3 agreed that the quality of the merchandise fabrics was good. Participant 4 mentioned that it was perhaps not best, but was still fairly good.

High LSM Store A and C

Personal Observations

Both Store A and Store C invested a great deal in quality garments. Store C's garments were highly worth the price. The high quality and uniquely designed handcrafted abilities used, created the garments suited to the brand. They created quality garments that were amazingly soft and thick. Great attention to detail added subtle touches in representing their brand/logo. The use of handcrafted beading was incorporated in majority of their pieces; leather tags or metal tags with their name displayed on it. The Nguni logo was embroidered on shirts or t-shirts with good quality denims and genuine leather footwear.

Thick, rich fabrics were utilised for Store A's garments. They imitated runway fashion in quality and not only in style. Although Store A's garment quality was good, the prices were higher, it was not always affordable for an average income earner. The prices were aimed at mid to high income earners. The selling point for Store A was quality and not price. The kids' clothing was of excellent quality, however the purchase price for a garment did not warrant enough wear out of it.

Focus Group Observations

Participant 1 and 4 noted that Store C's quality was described as excellent. Participant 1 mentioned that the quality of the clothing, such as the t-shirts, were branded and made from thicker cotton when compared to other stores in question and Participant 4 mentioned that the good quality further motivated the successful design of store.

Participant 1 mentioned that the clothing itself was disappointing in proportion to the look of the Store A. Participant 3 mentioned that Store A was still viewed as a mid-priced point store, that caters for fashion slaves, who wanted the latest fashion at a reasonably priced bracket. The quality was not particular concern the buyer, as the expected lifetime of the garments would not be longer than 3 years. The targeted clientele only wanted the latest on-trend fashion, for that particular season. The exclusivity of the limited size availability, motivated the buyer more than its quality.

4.5.2.3 STORE QUALITY

Middle LSM Store B and D
Personal Observations
In relation to merchandise quality, the store quality could be perceived differently for both stores. As middle-income stores, the merchandise quality is compared according to price point and the store quality is compared according to the LSM. In design, the store quality perception can be identified by the quality of finishes, fittings and fixtures in store. When analysing store finishes, fittings and fixtures in Store D it was noticeably of lower quality when compared to Store B. Store D utilises standardised fittings, cheaper quality finishes and lighting fixtures that are not fully considered for its store design. Store D has implemented good advertising techniques to promote the quality of their merchandise through large posters and signage varieties for each brand. Due to the visual impact of in-store signage and advertising of their various merchandise ranges, it increases the perceived quality of the merchandise. Store D has also chosen to collaborate with many local designers, artists and manufacturing companies which are often recognised on social media. Due to these technological advertising techniques the store quality and merchandise quality is promoted.

Store B has made greater efforts to include a variety of fittings, quality finishes and included a structured lighting layout with effective lighting choices in store. Through their store design quality, the merchandise quality could be perceived as good quality. Store B incorporated their actual merchandise within their advertising displays which gave greater credit to the quality of their store and merchandise.

Focus Group Observations
The store design of Store D, at the V&A Waterfront, was described as deceiving by Participant 4 as their brand had changed over the years. Their in store finishes and fittings were stock standard but implemented in a way that made the garments seem

of better quality than what they were. The store quality and design of Store D was addressed better than other outlets of the same brand, thus not quite matching each other. However, Participant 4 did point out that this was possibly due to its location. The layout and finishes gave the store a good aesthetic, representing their store identity.

Participant 3 noted that Store D's quality was satisfactory but required maintenance. Store D was seen by Participant 2 to be "*all about price*". He mentioned that whilst walking into their store, one instantly noticed big graphics that indicated apparel prices. Therefore, having already made one aware of how much one was to spend by getting a pair of jeans for R99 and matching top for R60. It was all about the merchandise prices, and the money invested in the infrastructure. The design of the store was viewed as "*efforts to save the customer money*". The same applied for product pricing and quality. The investment made into designing the store and designing the garments, was consistent as it was about saving the customer money.

Public Domain

Both Store B and D aimed to achieve the season's look without the designer price tags (ACRF, 2014). Store D strived to maintain a low overhead structure, this was also imperative in delivering acceptable operating margins (Mr Price Group, 2014: 15). Store B performed well by using an affordable fast-fashion and cash-based model in South Africa (Moorad, 2014). Lower prices resulted in large order quantities and higher sales volumes. Although the country's credit-heavy retailers were under pressure, due to consumers' indebtedness; this indicated that value retailing applied to both Store B and D. The price value for Store D was achieved through low operating and merchandising costs, to maintain their low prices, and also involved fashion at great value for money, whilst still having kept up with trends and it created a strong brand image (Mr Price Group, 2008: 13).

High LSM Store A and C

Personal Observations

The quality of Store A could be seen as high quality due to its simplistic, minimalistic and consistent store design principles. They repeated the same finishes, fittings and fixtures throughout their store however, each time it was utilised it remained to the same quality. It was due to this simplicity and consistency, that store quality was positively perceived. The store's base white colour allowed the colourful, textured garments to become display pieces of the same good quality.

Store C was opposite in design to Store A, as they did not focus on simplicity but rather on the details. They chose to use detailed finishes, textured fabrics, detailed and bold lighting, fixtures and fittings throughout their store design which added a richness to its quality. The same has been applied to the quality of fabrics and the detailed beading or prints incorporated for their merchandise and merchandise display units, point of sales. Even the door handles were bespoke. Thus, it exuded luxury in the quality of store design finishes, fixtures and fittings.

Focus Group Observations

Participant 3 noted that Store C's quality was good-to-excellent. She described the flat pack merchandise on beautiful old wooden tables and good quality timber hangers for hanging garments. Store A was described as well-maintained, with their visual merchandising display tracks offering flexibility. Participant 4 identified that the quality of the clothing and design of Store C went hand-in-hand, as the store design was well curated and offered a sense of pride in the purchasing process. Participant 1 mentioned that the identity of Store A was fitting of their customer lifestyle rather than the quality of the clothing. Merchandise units looked separated from the walls, creating space within space.

4.6   Promotion

4.6.1   Advertising

Store advertising enticed customers through its signage and graphics. Each local and global brand in-store advertising was described below.

4.6.1.1 SIGNAGE

Middle LSM Store B and D

Personal Observations

Store B had different signage for each section of the store. The "Body" section incorporated signage suited to the type of merchandise displayed, utilizing pink to define a feminine touch. Within the accessories and footwear area, framed quotes were displayed about the love of shoes and accessories in various sizes. The kids merchandise signage was more understated, utilizing black writing on timber boards and red writing on large white boards. Small colourful graphics of kids wearing merchandise were added to portray the target market. Large lit up signage was integrated behind the point of sales, highlighting the till points. The fitting rooms

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positioning was indicated by large lit up lettering saying *"Try it on"* at both male and female points.

Store B displayed where store locations were situated in other countries, by advertising a sequence of countries names on the wall. Store B's name and South Africa, was highlighted in red bold writing. The rest was displayed in black uppercase lettering on white walls. Notably from all the signage, the advertising boards and graphics were utilized (Refer to Figure 4.49) and incorporated within the store. It was clear that in-store advertising was very prominent and important to the company's marketing strategies.

In Store D quotes, in lowercase laser cut 3D lettering, were placed on the columns in white and red lettering (Refer to Figure 4.49). In each merchandise collection there was a clear use of signage, each uniquely designed to suit the specific range. Signage displayed the featured range of clothing, called" the edit", and was placed within a square steel grid. The signage hung from the square grid, and was framed by the black steel. Each letter had a black block on which the white letter was placed, spelling out "the edit". The wall displays in the female section, and floor displays, took on the same concept utilising the black steel bars, with signage incorporated for the range fixed to the bars (Refer to Figure 4.58).

Focus Group Observations

It was mentioned by Participants 1, 3 and 4, numerous times, on how much the signage was enjoyed in the middle LSM stores as it contributed to the ease of shopping in the store. Participant 3 mentioned that Store D had very well signed posters. She elaborated that if one wanted denims or shoes, they had little scrabble board letters, in black and white, which indicated good contrast value. It was suspended at a good height, indicating where to go and what you could get with prices clearly displayed in large lettering. Should one only have had R500 to spend, then one would be aware to steer clear from the specific area where more expensive garments were displayed as the more affordable apparel areas were indicated in store.

Participant 3 interestingly found that both Store D and B relied heavily on their lifestyle decals to educate the shopper. Store A and C spoke a different language; assuming that the shopper was already informed. Participant 4 elaborated that it identified the type of customers that these stores were trying to lure into their store. Those customers who shop at Store A or Store C will not need to be informed as they were already aware

as to why they came to the store, what they intended purchasing and how the store operated.

Participant 3 recognised that Store B utilised very creative and captivating signage in their fitting rooms. Participant 3 and 4 (2017) recognised that Store B included signs that said "yes, no, maybe or later" and "maybe, yes, definitely." Those types of quotes brought a fun element to the store. Participant 3 (2017) identified that Store D brought in some humour through their signage but in a unique South African context. There was a sign which said: *"No way, oh Yes, that's seriously our price"* (Refer to Figure 4.50) and another which said, *"Shop, tweet and share with our free Wi-Fi, it's like seriously free"*. The word *"seriously"* was a word often used in South African colloquialism which depicted a different store culture and identity, according to Participant 3 (2017).

The playfulness of the middle LSM stores was enjoyed by Participant 4, when it came to connecting with the client (Refer to Figures 4.51 and 4.52). She felt that Store D and Store B were more successful in terms of portraying non-verbal communication through the use of fun signage quotes, whereas Store C and A felt more serious.

Participant 3 identified that Store B definitely wanted customers to know that they were an international brand. They used a cinema old movie type face to mention all the countries they had stores in, displayed boldly on the wall "Store B Saudi Arabia, Sydney, Brazil, Venezuela, Singapore" They wanted customers to be aware that one was paying for an international brand. This was used as a promotional technique to promote themselves and played a role in their identity as a global brand store (Refer to Figure 4.49).

Participant 2 and 4 agreed that the middle LSM stores were also successful in displaying and highlighting newly arrived stock; Store B was the most successful in displayed signage to indicate when new stock had arrived. Bold, yet simple, signage could be seen carried through the whole space. It was used from the front of house to the back, at intimate wear, leading to their fitting rooms. The middle LSM stores won Participant 4 over, as they made everything more visible as opposed to the higher-end stores. For the high-end stores, Participant 1 mentioned that the shopping experience was intentionally designed to be different so that sales assistants could offer more customer assistance, rather than signage having done their job for them. Although it was expressed that the customer could go to the garment themselves to have a look at the clothing tag. However, having the information more visible allowed the customer

to feel more knowledgeable about the product, which catered for shopping ease and comfort.

Public Domain

Store B had grown over the years in marketing and advertising. Initially, Store B relied little on commercial marketing and left the product and store presentation do the talking (ACRF, 2014). Store B believed in discovering and prioritising what the customer needed and incorporated that within their store advertising. They regarded marketing as an important element in their future growth. They had a public relations program, well established website, and great in-store promotional offerings in place (ACRF, 2014).

White walls, with black uppercase lettering, good spacing, easy to read. Highlights store name in coloured lighting

The signage wall display depicts Store B's presence as an international store

The uppercase lettering emphasises all the countries in which Store B is located

Figure 4.49: Store B Wall Signage and graphics.

(Flair, 2014)
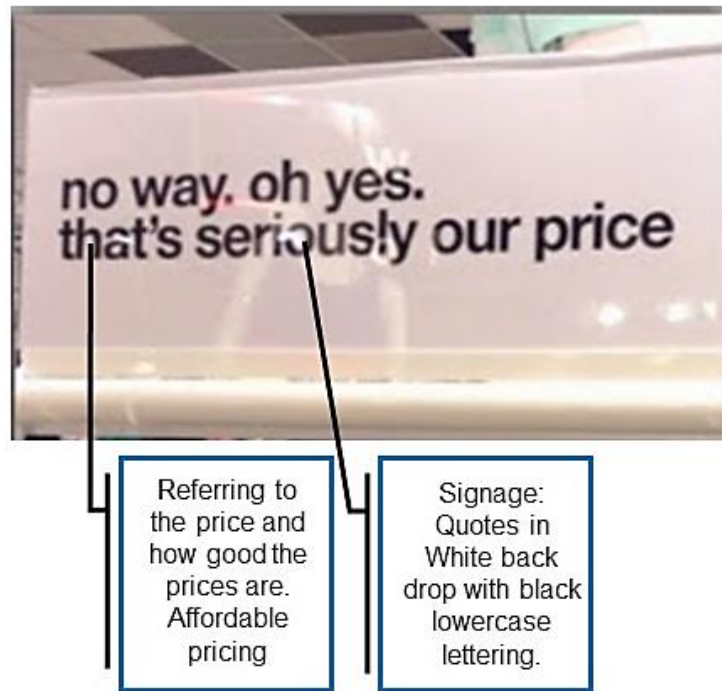
Figure 4.50: Store D Advertising Signage.

(Glamouronthego, 2014)

Figure 4.51: Store D In-store signage boards.

(Glamouronthego, 2014)

Figure 4.52: Store D In-store signage placed by apparel displays.

(Proome, 2014)

High LSM Store A and C

Personal Observations

There was a clear indication of branding, through signage, throughout Store C. Store C's façade displayed their Nguni Logo, which was an African symbol of wealth and prosperity. The logo was emphasised on everything within the store, from the entrance to the fitting rooms, point of sales, and merchandise including the purchase bags.

Store A only used basic signage to demarcate the different sections for male, female and kids. They used the name of the store before mentioning whether it was women's or men's merchandise. This introduced each store merchandise section and the apparel was grouped in brand name in the same way; first the store name and then the range name such as "basic" or "formal".

Store A had fire signage placed on the walls above the display units which made use of the high floor-to-ceiling space. Signage directed to where the male merchandise was fixed to the white wall, in 3dimensional glossy serif font black uppercase lettering, with the fire escape exit signage hung from the ceiling. Due to the size of Store A, more directional signage was required.

Focus Group Observations

Participants 2 and 4 noticed that Store A and C did not make any effort to highlight newly arrived stock. It was not clear whether the clothing displayed on the mannequins was new. It would need to be assumed due to Store A being a high-end fashion focused store that all the clothing is new or is often updated. Participant 2 mentioned that Store A's main signage, and transitional signs, were illuminated and clearly defined the transitions between the different departments. Participant 2 elaborated that they had transitional sides, thus when one entered the men's space one had the signage on top of the header. When one entered the kids' section, it is clearly indicated but not illuminated. The internal signage was only black lettering on a white background. It indicated transition between merchandise for each gender within the space. Participant 2 (2017) said: *"I think it gives a clear direction for the customer to go straight to where you want to be if you need men's clothing."*

Participant 1 noticed that Store A's signage was consistent and no decals were used. Their minimalist approach made it difficult to find information about the garments from a distance; the only information available was found on the clothing tag. The customer was physically required to take the garment off the rail and search for the tag.

Participant 1 mentioned that Store C relied on their sale assistants to inform customers about sales or specials. All the merchandise was displayed separately and no hype was created as a form of promotion in store. Participant 3 and 4 agreed that Store C's signage was simple, light and straight forward and portrayed good quality.

An interesting observation was made by Participant 1 regarding the overall typeface chosen for fonts, for the middle-income stores versus the high-income stores. Store B and Store D both chose fonts without serifs, whereas Store A and Store C both chose fonts with serifs. The family of fonts that Store A and C chose to include, were old fashion typeface whereas Store D and Store B were more of a minimalistic font although their clothing spoke a totally different language. Store D used their font on all their clothing as branding; there was a definite tie with their merchandise, signage and branding. Store A's name was not seen on any of their clothing and Store B was a combination where some of their clothing was definitely branded and other items not. Store B had a much smaller store front signage, whereas Store D was bold and strong in their store front signage. Store A was more consistent in their letter spacing, where they applied it and was not overly done. Store C was also minimalist in application, only positioned on the wall, door and shop front; their merchandise was also branded.

4.6.1.2 GRAPHICS

Middle LSM Store B and D

Personal Observations

Store B displayed various graphic boards within their store. Each of these boards included an image of a model wearing Store B merchandise, a description of the item displayed the cost of that item or whether or not it was on promotion. In both the male and female sections, there were framed graphics incorporated in wall display units. It displayed models wearing Store B merchandise and included fun quotes.

There were two screens displaying graphics on either side of the entrance by the dividing columns. Store B also made use of graphics as advertising in their window display. Graphics were framed and well lit, placed close to the entrance as part of the feature displays.

Store D displayed a variety of different graphics throughout the store. Large graphic posters hung by the displays windows as a backdrop to advertise the current trends. Graphics were displayed at every clothing range, e.g. In the "RED" range a graphic of a model wearing an item of that specific collection; suggesting "RED" offered casual wear for females in the section advertised.

A large lit up graphic was displayed behind the point of sales, spanning its entire length (Refer to Figure 4.53). It displayed models wearing store branded merchandise. There was a digital advertising screen, by the entrance into the fitting rooms, for digital imagery. Overall, both stores utilised printed graphics and digital imagery as a means of in-store advertising.

Focus Group Observations

Participant 3 identified lifestyle graphics as an important factor that reinforced a store's target market. It was found, by all participants, that middle LSM stores made use of lifestyle graphics and decals to show a person wearing the clothing whereas the high LSM stores did not rely on them at all.

Participant 1 recognised that Store D utilised low-quality paper for decals which allowed for easy exchange when new stock arrived. This allowed for flexibility and adjustability with the seasons and trends. Participant 3 noted that the poster graphics, used at Store D's shop front, created a barrier between the shop front display and the interior. There was a successful large backlit graphic integrated in its full length on the wall behind the

point of sales which was eye-catching and clearly indicated who the target market is for the store (Refer to Figure 4.53). Prices on the poster graphics were large and bold described by Participant 3. Participant 4 noted that the graphics used in Store D were visually striking; it told a story and had not appear disjointed.

Participant 3 also noticed that Store D included 5 data projectors, periodically mounted on the ceiling in store. It projected images on the wall at about 2.3m in height. These projectors were not noticed by all participants due to the heights at which they were placed. The graphics were projected onto busy walls. The store lighting diffused the projection; it felt unnecessary and distracting rather than a good addition to the store, according to Participant 3.

Participant 3 mentioned that Store B also had amazing variety of graphics. Walls had framed pictures; their Rubi shoes branded has a separate green and white sign which appealed to the brand. They used a variety of finishes to frame and create signage and graphics, such as glass and chalkboard paint against the glass. They also displayed crystal clear images on LCD screens, integrated into the wall, which gave a good sense of the look and feel of the store. Participant 4 agreed, mentioning that the store graphics were well presented. Whereas, Participant 1 commented on the method in which they applied the graphic posters to the walls, using Prestik. She pointed out that the decals were an afterthought and the method was cheap.
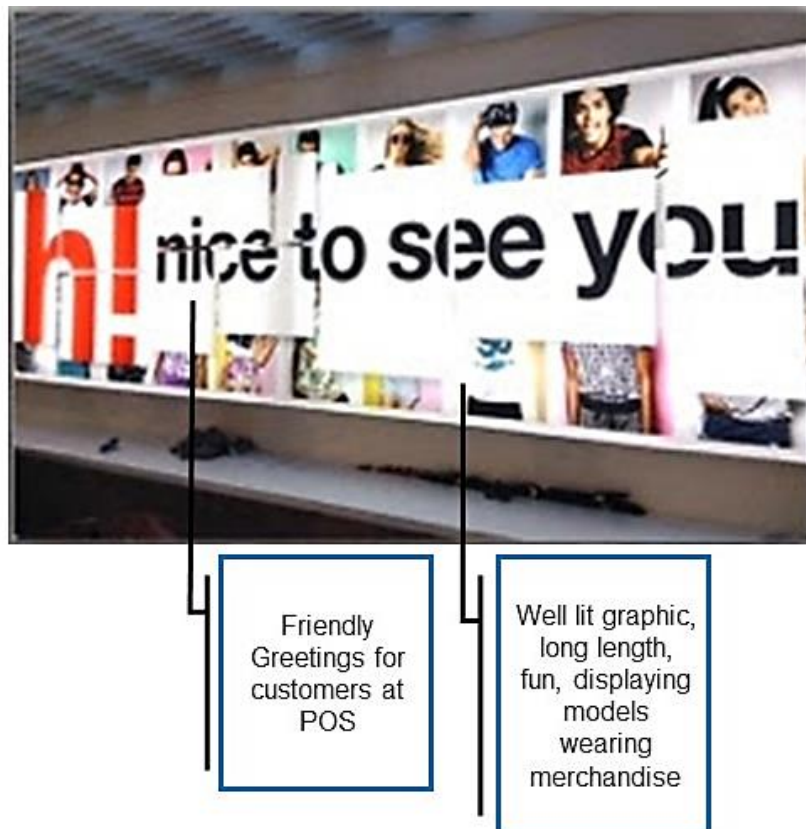
Figure 4.53: Store D Large graphic behind point of sales.

(Glamouronthego, 2014)

High LSM Store A and C

Personal Observations

Large graphics were used in Store C, although minimal in use. Only large open wall spaces had large black and white graphic of models wearing the merchandise. There were extra touches in the form of packaging that advertised their brand, such as the beautifully designed bottle for their fragrances. Each one was designed differently to suit each gender, which included the personal touches in their display units, such as trophies, African succulents and mannequins sitting on hardwood blocks. There were hardly any graphics in Store A, only large lit up graphics by the point of sales in each store, framed by a black gloss backing.

Focus Group Observations

Participant 3 mentioned that one was hardly exposed to any advertising in Store A; Participants 1, 3, 4 and 5 all agreed that graphics were minimal. There were large LCD screens, at the point of sales, but no overpowering graphics within the store. Store A carried through their minimalist approach by utilising minimal advertising in store.

Participant 4 mentioned that less was definitely more, for Store A. Whereas, Participants 3 and 4 recognised that Store C had encingly beautiful framed graphics displayed in store but were less signage heavy. Participant 3 explained that the framed large black and white photos created an old worldly feel and added a romantic aspect to the store; this portrayed a lifestyle.

Participant 3 (2017) said: *"They gave that sense of romance. If I wear their clothing I'm going to meet prince charming in the bush."*

Public Domain

There was very simplistic advertising incorporated in Store A as the firm spends only 0.3 percent of its annual turnover on advertising (Lopez and Fan, 2009: 282). Most of this percentage was used at the beginning of the sales season or the occasion of a new store opening. The store and social media were considered their most effective communicative tool (Lopez and Fan, 2009: 282).

There were only lit up graphics displayed by the point of sales, this was the closest Store A ever got to advertising and was the responsibility of the corporate image department (Tungate, 2008: 52). Store A chose to focus their offerings in terms of price, design, rapid turn-around of stock and the store experience was aimed at adding value to their customers. Therefore, they positioned their stores in prime locations and devoted much of their façade to large display windows and streamlined eco-efficient interiors (Tungate, 2008: 50).

4.6.2   Displays

In-store displays, also known as visual merchandising, is described below.

4.6.2.1 VISUAL MERCHANDISING

Middle LSM Store B and D

Personal Observations

Store B had a large selection of designed displays in various materials and colours which suited their clientele. Store D had a number of standardized displays in-between their designed displays. Both Store B and Store D had designed featured display areas, changing to the needs of their customers through renovations, which resulted in a different shopping atmosphere.

There was a large variety of visual merchandising displays designed for each section within Store B. They were differentiated by the various types of finishes. Darker masculine finishes were utilised within the male section for various visual merchandising displays. Lighter feminine finishes were incorporated in the female section for various visual merchandising displays. Fun and colourful, yet understated designs, were utilised for visual merchandising displays in the kid's section. Tables and benches were incorporated, at different heights, for folded items repeated throughout the store. All walls were utilised as hanging display on slat walling systems with a combination of freestanding hanging units, at different levels, used within each section. Half body and full body mannequins were repeated in each section, to display their latest arrivals to entice customers. Mannequins were placed, at different heights, in the store. Some were freestanding, some placed on timber boxes and some on timber shelving by wall display. Hanging displays were placed close to mannequins wearing the same clothing, e.g. Active wear displayed on mannequin is the same active wear displayed on the display unit (Refer to Figure 4.56).

Within the female section, featured merchandise was displayed above the slatted walling systems, to make use of the entire floor to ceiling height. When visiting the store, various style hats were displayed on the walls as a feature in different colours overlaid as a display on the wall. The hats then matched with the range of items on display, such as shorts and summer tops. It enticed customers to purchase more than one item, such as a hat with shorts and top. One then left the store with an entirely new outfit for the summer season.

Each variant in colour shorts and jeans were pegged to the walls as a showpiece. Light timber shelving was incorporated in the aluminium slat walling system for folded jeans. Prominent colours, used in female visual merchandising displays, were white and pink. They also used of finishes such as aluminium and light timbers, whilst adding a touch of green with artificial green walling systems. Vintage styled tables and benches were situated at different heights. They were either painted in white, light pink or remained raw and light in unfinished timber. All these elements were incorporated in the "Body" section for folded undergarments, sleepwear and active wear.

Within the male section, dark timber and black steel display units were incorporated. Timber shelves were integrated within a black framed slatted walling system which was supported against a black painted face brick wall. Metallic and black powder coated steel hanging displays rails were situated on open floor space. Black I-beams framed the large floor-to-ceiling slatted wall displays. Kid's displays had painted steel, in fun

colours, such as blue and green with neutral timber cladding on walls (Refer to Figure 4.56).

There was a core display feature at the entrance to Store D. It was comprised of female merchandise. Black powder coated steel formed a pergola. Its shape formed an overlay of steel bars, creating equally spaced squares. There are 7 vertical ceiling boards that were spaced equally, hanging between the 600x600mm tile block. It fitted through the square black grid of steel at random spots in the grid. There were black studio track lighting hanging over the feature display on either side, which lit up the entire feature and emphasised the mannequins. The mannequins were placed on white boxes at different heights. Signage displayed the featured range of clothing, called" the edit", also placed within the square steel grid. The signage which hung from the square grid, was also framed by the same black powder coated steel. A lit up graphic board hung in rectangular vertical format in the middle of the display. There were steel hanging rails which surrounded the main display, continuing the black steel bar concept. Some rails were half mooned with others straight, which created juxtaposition between straight and curved elements (Refer to Figure 4.58).

There was no consistent shape of displays utilised within Store D. Some were standardised hanging rails, some rectangular, some half mooned or hexagon shaped. Slat systems were utilized for free standing displays, for accessories to hang from, such as hats and bags or belts that were grouped together on one display rack. Slat walling systems and free-standing hanging units were utilised for undergarments and sleepwear in female section. Slat walling systems were more prominent in the female's accessory and footwear area (Refer to Figure 4.64). Half body mannequins were integrated, above displays, which utilised the full ceiling height (Refer to Figures 4.57 and 4.59).

The wall displays in the female section and floor displays, took on the same concept utilising the black steel bars, with signage incorporated for the range fixed to the bars (Refer to Figure 4.65). Square steel profile bars were used for hanging items fixed to the walls. Small timber shelving were installed in-between for folded items. Hexagon shaped shelving display units utilised for folded jeans for their denim range (Refer to Figure 4.61). Half body mannequins, placed on top of the display unit, indicated the different denims on display (Refer to Figure 4.61); the merchandise was displayed at different heights. Grouping merchandise enticed customers to purchase an outfit that had already been put together (Refer to Figure 4.63). Store D display units included hanging rails and tables with folded garments placed close by one another. This made

it easy to match garments with one another, e.g. a jacket with a top. Different heights and finishes, for plinths, on which the mannequins stood. There were hanging rails which were one long length but varied in heights. There were tall display units, for hanging, with wheels on allowing for flexibility in layout. The tall display units were constructed using powder coated steel. There were tall displays, with exposed grid structures, on the sides with small mirrors for viewing of accessories (Refer to Figure 4.63).

Focus Group Observations

Participant 3 observed that Store D had a good variety of different display options. Garments were front hung, side hung and folded. They had tall mannequins, full length mannequins, tiered display options as well as feature displays by aisle columns. These columns were highlighted by painting them black. Every second column had a special feature area, where they had mannequins below a black steel structure that framed it. It flowed down from the ceiling which gave you a lower floor to ceiling height (Refer to Figure 4.58).

Participant 4 noticed that the mannequins utilised were displayed in different ways. When displaying their jeans, they did not use a full mannequin, they only utilised the bottom half of it and turned it upside down so you had the legs dangle in the air showing off the shoes as well. Participant 4 found this interesting as it was something that one would not often see in stores. This created a visual merchandising element that was different from the norm and tied in with the playfulness, which Store D incorporated in their signage and graphics in store.

However, Participants 3, 4 and 1 did notice some disturbing aspects of their visual merchandising. Participant 1 noted that insufficient thought given in regard to how the clothing was displayed; no proper strategy for using the front hanging units to promote the items. The mannequins were poorly dressed and not in realistic lifestyle mannerism found elsewhere. Participant 3 also agreed that the mannequins were poorly designed as the black coloured mannequins were wearing blond wigs (Refer to Figure 4.58). Participant 4 mentioned that quality of the visual merchandising finishes varied. The front of the store looked a lot nicer than the back. Effort played a role in choosing not to continue the entire look, only to entice from the entrance.

Store D's visual merchandising units were emphasised as low quality by Participant 3, due to their standardised pegboards included. Participant 4 defended Store D, mentioning that certain design aspects and detailing incorporated in Store D; changed

one's perception of their stores purpose. Their sole purpose was not just about selling large amounts of stock as they tried to incorporate design aspects. There was purpose in the design of the store and there was a particular store image aimed at creating for Store D.

Participant 3 noted that Store B had an excellent variety of visual merchandising units which catered for front hung, side hung, and flat packed merchandise and also used mannequins to display merchandise; the variety came through in their choice of finishes to differentiate them. Participant 1 noted that all the various areas, that were demarcated, had different themes therefore they maximised on front hanging displays which showed off the type of merchandise sold in that particular area. In some areas there were posters and mannequins to show the range but then the clothing was hung side-by-side or folded which resulted in more stock on the store floor (Refer to Figure 4.54). Participant 4 noted that due to the use of different levels of display, it always provided something new to look at, which created a visually appealing displays from all angles.

Participant 1 noted that Store B displayed their merchandise in a modular format yet individualised for the various areas. Participant 3 noted that the mannequins wearing the merchandise were placed, at different heights, on pedestals within the store and storefront (Refer to Figure 4.55). Participant 1 mentioned that Store B provided great viewing distance between the shopper and the merchandise due to the way it was hung at various heights on their wall display.

Public Domain

Visual merchandising was important as it acted as the face of the company and appealed to people (UK Essays, 2013). A high standard of visual merchandising was used in Store B to represent the company's corporate image (UK Essays, 2013). Store B's enhanced visual merchandising display concepts and designs have differentiated itself from its competitors (UK Essays, 2013).

Figure 4.54: Store B In-store visual merchandising displays.

(V&A Waterfront, 2018a)

Graphic boards hang from the ceiling

Raw exposed finishes on walls

Lit up graphics mounted on walls, timber box framework in which lighting is hidden

Garments hang close to the floor, but rails to differ in height to accommodate for longer length garments

Some mannequins have no legs and head and others are full length mannequins to display various types of garments

Hanging displays placed close to mannequins who are wearing specific clothing that are worn by the mannequins and displayed on those rails

Figure 4.55: Store B Visual merchandising displays placed close to store front.

(V&A Waterfront, 2018a)

Active wear displayed on mannequin is the same active wear displayed on the display unit

Graphics of models wearing active wear

Walls in kids area are cladded with timber

Graphics of kids wearing merchandise

Use of timber, white powder coated steel and chrome finish used for display unit design

Odd that active wear mannequins have no legs, as pants are displayed

White steel base for mannequins in active wear area

Colour added to framework of kids area displays in greens and blues

Figure 4.56: Store B visual merchandising displays in kids and active wear apparel section.

(V&A Waterfront, 2018a

The back of the store by the shoes seems much brighter than the rest of the store

Clustered grouping of pendant lights over entire shoe section

Half torso mannequins used on freestanding and wall displays

Full sized mannequins in a gloss black finish and wearing white haired wigs-not a realistic representation of a person

Floor finish changes from tiles to timber flooring. Divides female clothing and accessories/ shoes

White powder coated steel framework for freestanding single hanging display rail

Powder coated steel framework for pegboard display system

Figure 4.57: Store D Visual merchandising displays and Store interior, V&A Waterfront.

(Joseph, 2014)

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Figure 4.58: Store D Feature Display, V&A Waterfront.

(Joseph, 2014)

Figure 4.59: Store D Menswear apparel display and point of sales.

(Emmajanenation, 2014)

The prices are clear, emphasise of price throughout displays

Half body mannequins from waist down to show fit of denim jeans

Signage is clipped onto steel bars instead of fixed.

An abundance of denims all on one wall

Table displays for smaller items such as tops that can be easily laid on table

Affordable pricing

Consistent widths between shelves

Figure 4.60: Store D Female apparel display.

(V&A Waterfront, 2018b)
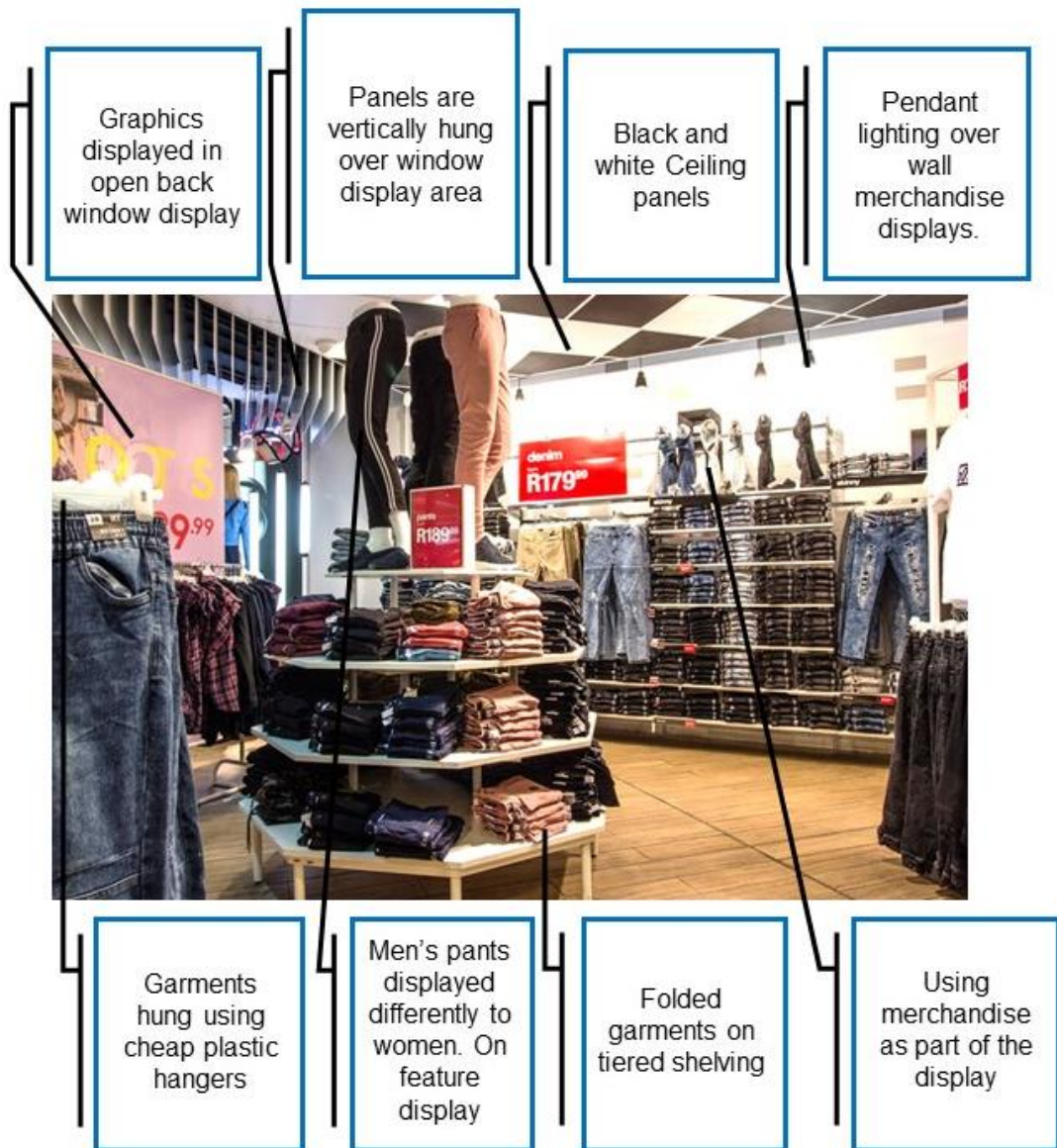
Figure 4.61: Store D Men's apparel display.

(V&A Waterfront, 2018b)

Figure 4.62: Store D Female apparel visual merchandising displays.

(V&A Waterfront, 2018b)

Clear aisle space and change in floor finish

Use of feature displays in front and around structural columns

Hanging rails and tables with folded garments placed close by one another. Making it easy to match a jacket with a top

Different heights and finishes for plinths

One consistent hanging rail that varies in heights

Figure 4.63: Store D: Visual Merchandising displays.

(V&A Waterfront, 2018b)

Standard wall bracket system

Timber slat wall system- timber panels, painted in white

Bag hooks, fitted in brackets

No breathing room between the accessories and the clothing

The female accessories display unit is raised off the floor. However, not neatly aligned. 2 separate units rather that one custom design

White powder coated steel shelving Hung on shelf hooks onto slatted wall using bracket
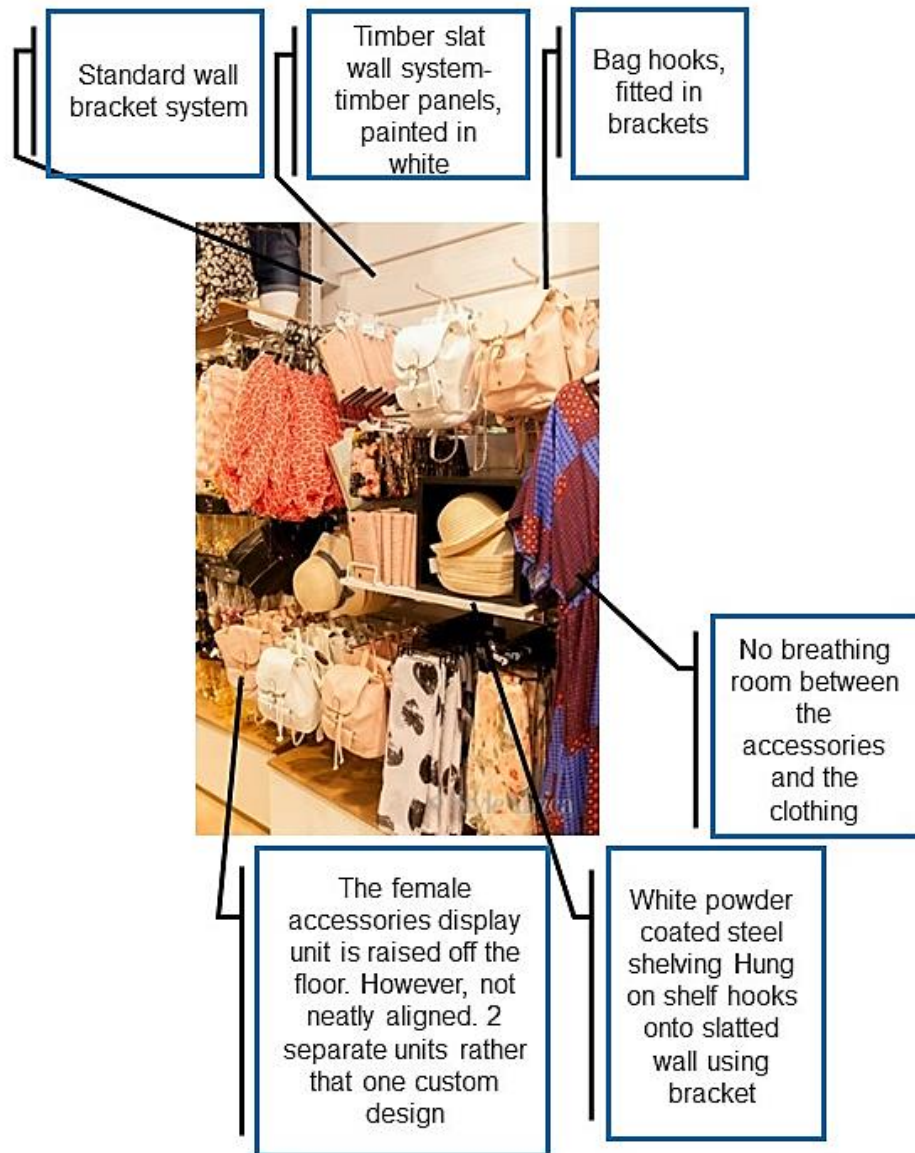
Figure 4.64: Store D Female accessories display.

(Joseph, 2014)
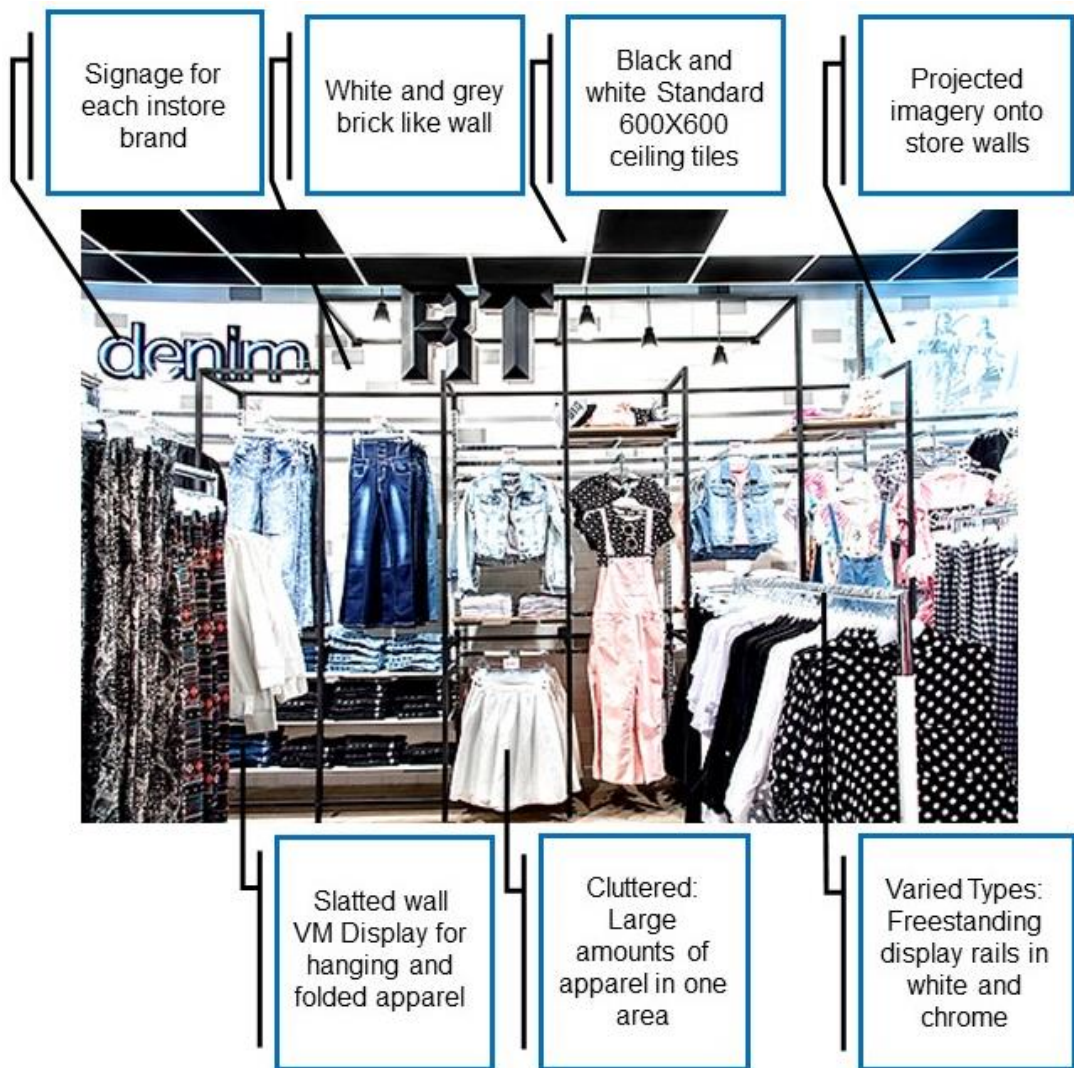
Figure 4.65: Store D Slatted wall visual merchandising display and clear brand signage.

(Capetownsdarling, 2014)

High LSM Store A and C

Personal Observations

Store A displays were well structured throughout the store. There were multiple types of visual merchandising display units used; some were built in and others were standalone displays. Each section consisted of the same types of displays, repetitively used throughout the store. The units were organised in a way to remain neutral and uncluttered throughout the spaces.

The merchandising displays, built into the walls, were custom designed and visually appealing. The fixed hanging rods were hidden so that the fixing method was not seen. A linear steel plate was fixed on the front of the hanging rods, running across the entire length of the fixed rods. Within the steel plates was LED strip lighting, resulting in a consistent line of light throughout the store. There was a continuous black outline detail which ran throughout the store. This was created by a black skirting running along the

bottom of the built-in display units; it created an illusion that the built-in display units were floating. The accessories display was completely black. The glossy material used reflected the accessories hung on the display. The table displays were either fully black or white painted timber. The store layout was formulated by repeating the u-shaped built in display units throughout the store. The organisation of the products within the display units created a space that encompassed a dressing room, where one could mix and match items to a build a personal look or style. The same type of hanging units utilised in the female section are found in the male section. These hanging units are set at different heights, depending on the garment length. The high floor to ceiling height is not fully utilised throughout the store as the display units only make up half the height. Most of the wall space was utilised throughout the store for merchandise display. There was a good balance in the number of visual merchandising displays utilised in the store layout; there were multiple types of display units utilized. Some were built in and others standalone displays, with a few mannequins placed in-between. Each section consisted of a repetition of the same types of displays and each built in unit accommodated for both hanging and folded garments/merchandise (Refer to Figures 4.66, 4.67 and 4.68).

There were dark timber display units throughout Store C. The timber units were used to separate the first half of the store which lead into the second half. The visual merchandising display units were chunky, bold and detailed to provide an old vintage library shelving look. The lighting for the display units were built in the sides of the unit. Store C's visual merchandising displays units were all custom made, designed to suit the store identity (Refer to Figures 4.70 and 4.71).

There were sections for hanging items, folded items and sections for displaying clothing on half body mannequins. There were steel hanging rails used to separate display in the male and female section. Hanging items were always matched with something, to create a wardrobe solution, e.g. A jacket was placed with a shirt, as in impulse buy for both items instead of one. There were large round sturdy chunky tables used with half body Mannequins, placed above, to show off the displayed items. The men's area was well represented by using décor items, displayed on a solid timber table with criss-cross base (Refer to Figure 4.69). The ladies' area displays included handbags and sunhats. Most of the garments displayed were embellished with beads and handmade details or prints. All the shoes were placed on separate wooden blocks on a lower display section. There was a steel display case for beautifully packaged male, female and unisex fragrances. There were large solid timber blocks, set at different heights, used in certain areas in store.

Focus Group Observations

Participant 3 noted that Store A included excellent front hanging displays, along the perimeter of the store. Side hanging rails and island merchandising units were also integrated for flat packed garments, with the island units catered for tiered flat packing. Store A was all about seeing the merchandise visually and how they created variety in that. Participant 1 noted that majority of the displays featured hanging merchandise, with limited number of shelving for flat packed merchandise.

Participant 2 mentioned that when displaying their merchandise, they already created a style solution. In the men's section they placed shoes at the bottom, which matched the shirt and then the jacket, and immediately showed that this was what one could match together to wear. This display technique had been taken through consistently through the different lifestyles in store. If one was looking at formal items, one would have seen a formal shoe, formal pants, formal shirt and close by were formal accessories such as ties. The same technique was then used for casual wear, one would have seen sneakers, jeans, t-shirts etc. By creating these style solutions shoppers engaged with the clothing but could also browse without having to touch the merchandise (Refer to Figures 4.66 and 4.67).

Participant 3 mentioned that their approach to the interior was different to the other stores as the wall units seemed to be floating and touched the interior lightly along its perimeter. All perimeter units were no higher than 2m in floor to ceiling height, which freed ceiling space and contributed to the floating effect of the units. The units did not seem nailed or fixed to the wall but separate units that could be removed. Together the wall units created u-shaped nooks where different types of clothing could be displayed within (Refer to Figure 4.67). The perimeter units offered flexibility through the integration of tube tracks recessed in them and catered for different rails, so at any time one could change the perimeter layout.

Participant 1 noted that Store A's clothing was arranged in bays along the walls. The centre units were featured side-by-side hanging with forward hanging displays. Store A created a feeling of exclusivity by displaying minimal amounts of garments on each rail as most items were not folded flat. Participant 4 noted that Store A's displays were minimalistically designed throughout the store, with the merchandise having become the main focus. The visual merchandising displays represented a blank canvas with the merchandise represented as art to the display. Everything was beautifully curated for a long-lasting effect.

With Store C, Participant 3 felt that the interior captured a spirit of adventure and the spirit of Africa due to the safari type style portrayed. They used stretchers or camping beds, out of canvas with little leather details on, which displayed tiered merchandising, combined with beautiful old timber tables which looked like teak (Refer to Figure 4.71). They also brought in a lot of indigenous artefacts and decor items. They included items such as Protea's, baskets and buffalo heads which was situated behind the point of sales.

Participant 1 and 4 noted that Store C had limited forward hanging items displayed in store. Most of the items were either hanging side-by-side or flat packed as was the case of the t-shirts. One could not browse without the help of a shop assistant. Participant 3 noted the fixed timber wall display units which were used for flat packing their t-shirts. Participant 2 noticed that Store C stacked most of their merchandise at different heights. If they were hanging, they would have higher hanging areas and then your lower hanging areas.

Participant 3 described a tall glass cabinet used to display smaller items, such as their signature fragrances. No full height mannequins were used in Store C, only half torso mannequins without heads displaying shirts and scarves. Some men's pants were loose hanging off a peg rail. They also had a puck wall in which one could change the height of the display. The puck walls had rods and hooks where one would casually hang the gentlemen's pants. Participant 3 thought that this was quite a nice approach as the pants were loosely draped, as if hung in your own bedroom. It gave a sense of belonging due to the homely feel created. It was quite curated because the four long pants on these hooks were placed in the correct colour grading.

Participant 1 found it quite interesting, that in Store C one already knew that one could not buy the props displayed; the way in which they were displayed gave them each their own visual purpose. As opposed to a Store D where everything in the store was for sale except for the actual display unit. Interestingly, Store A was the opposite by displaying no props at all. This referred to Participant 4's point, where Store A was all about a blank canvas and only the merchandise were the display pieces on show.

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In Store A, there were more than 30 mannequins on display to showcase the fashion trends; this was in addition to the shop window display (Café du Cap, 2012) (Refer to Figure 4.68). *"Products are organised into cubes which serve as dressing rooms, intimate areas in which the shopper can create a personal look building from the ideas*

put forward by the brand. The space becomes a sort of catwalk in which they discover for themselves all the particles making up Store A's fashion universe" (Café du Cap, 2012). In Store C a complete shop fitting solution comprised of exclusive, high quality cabinets, display stands and checkout counters, all uniquely designed for the store (Shop Display, 2010).

Figure 4.66: Store A coordinated garments on visual merchandising displays in the female section.

(Graziadaily, 2012)

Apparel grouped to match an outfit together e.g. pants, with top, bag and shoes

Simplistic, White, Box shaped corner display unit

Entire box shaped unit is framed in white with black plinth

Front hanging apparel display-rod to hang garments on is hidden under white shelf. Black powder coated rods supports the shelf

Tiled flooring consistent

Table display floating off the floor using plinth

Black and white contrast Table display at different heights for folded garments and shoes

Units floating off the floor using plinths

Figure 4.67: Store A Store Display at V&A Waterfront.

(Graziadaily, 2012)

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Large, tall Mirrors are fixed onto structural columns. Mirrors the displays and merchandise

White plastered ceiling bulkheads

Lighting on tracks recessed into bulkhead. Good lighting to direct onto merchandise

Shadow line cornice, Hidden lighting along wall recess. Mirrors the outline of the wall units

Mirrors are repeated on columns and display units. Can view yourself with a garment at various points in the store

White powder coated steel base-Sturdy, simplistic

Mannequins are structured, all at same height, wearing repeated outfits. No wig worn

Display units line the walls in box like shapes. Each box with a tiered table in the centre or hanging rails

Figure 4.68: Store A Visual Merchandising displays.

(Graziadaily, 2012)

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Use of large dark timber tables and safari camper beds as freestanding display units for folded garments

Large Feature chandeliers create the most light for the space. It creates an ambience

Overall the space is quite dark inside. Accent lighting: Use of track lighting and downlighting

Round Central table used for feature display with mannequins wearing the folded garments displayed

Half torso neutral coloured mannequins are styled fully in layers of garments

Figure 4.69: Store C Interior and visual merchandising displays.

(ShopDisplay, 2010)

Instore black and white graphics depicting the target market

Detailed timber display units are custom built to fit in space between the column and wall

Open back display window with 3 full dressed mannequins in window.

Window display is lit using downlighters. It also allows malls "natural" light to enter the store

Individual display pieces just for show for the theme of the store

Rest areas are curated with a reading lamp, book and stool/side table

Woven baskets used to display loose apparel

Combo of freestanding display units: use of camper beds for folded garments and standing rails on wheels in timber and steel

Figure 4.70: Store C Visual merchandising displays.

(ShopDisplay, 2010)

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Figure 4.71: Store C: Interior and Visual Merchandising built in display wall units.

(ShopDisplay, 2010)

Entrance allows light to enter the store

Open back window displays

Detailed built in wall units-full floor to ceiling height

half torso mannequin wears merchandise displayed on table

Clear aisle space and change in floor finish using carpets

Indigenous pieces used to display garments. Placing hanging rail close to folded items display

Freestanding tables in dark timber finish

Figure 4.72: Store C Store interior and visual merchandising displays.

(Google maps, 2018c)

Figure 4.73: Store C Women's wear visual merchandising displays.

(Google maps, 2017c)

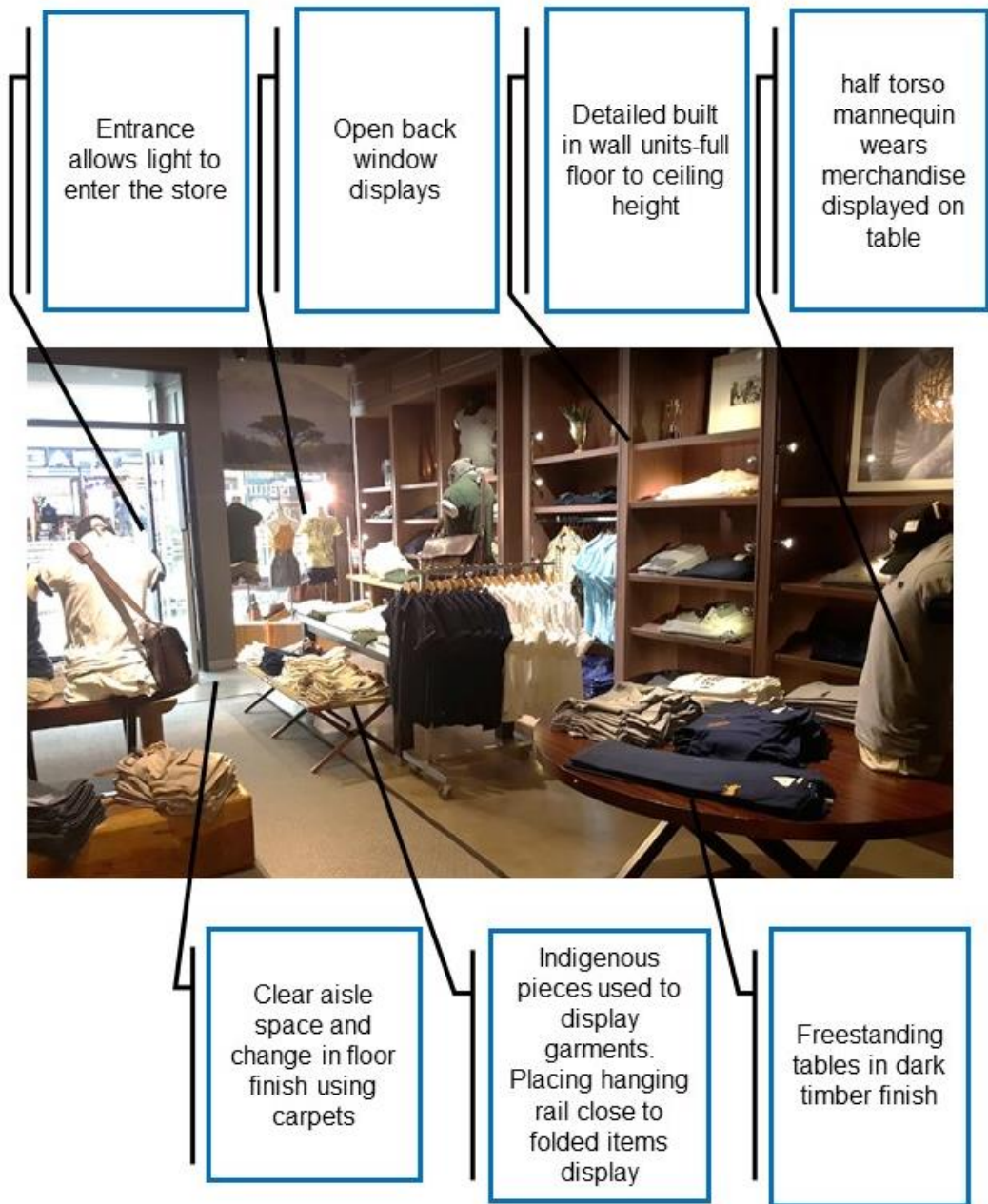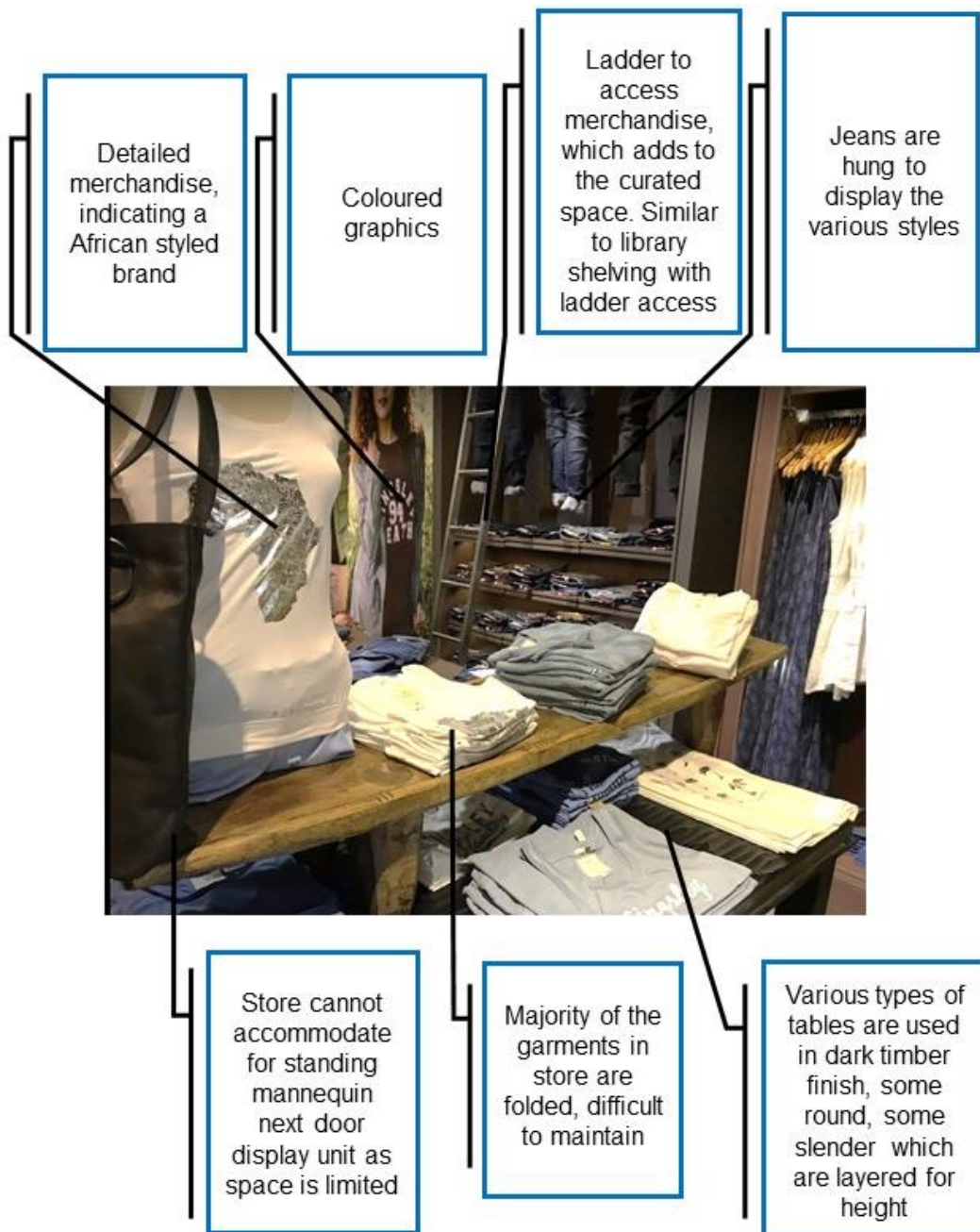**Figure 4.74: Store C Menswear visual merchandising display.**

(Google maps, 2017d)

4.7   Service

4.7.1   Payment options and services

Any new in-store technologies, used or provided as services, in the store are identified below.

Middle LSM Store B and D

Personal Observations

Store D was more advanced in payment methods than Store B, but offered many sales incentives. Customers could pay in cash, debit card or on account credit in Store B and D. Customers were assisted at a long point of sales area; each sales point was equipped with touch screen displays connected to a debit/credit card system.

Store D included touch display screens, for payments, by the point of sales. The touch screen displayed the staff member's name who was currently assisting you. You could pay at a different till, for 5 items or less, by using a new debit card payment system. The credit card facility shuffled the numbers around, as a safety measure, when you were prompted to enter your pin.

Focus Group Observations

Participant 3 asked all the stores whether they had SnapScan integrated as a payment option in store; as it was a popular payment option. Unfortunately, it was not integrated in any of the stores in this study.

Participant 3 noted that Store D had a data logic system, credit card facilities and a flat touch screen recessed into point of sales. Bollards were placed in rows to manage traffic to the point of sales. Participant 1 noted that the payment systems were very easy to use to allow for a high turnover of casual workers.

Store B offered good promotional services. Participant 3 (2017) mentioned a sale technique used: *"They have promotions when you spend more than a certain amount then you receive a gift for free because there are quite a lot of people who comment on their service and they say "I spent more than R500 and I also received a snood, I picked a light pink one because it's not the normal colour I would buy."*

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The managing director, for Store D's financial services, Rex Samuelson explained that:
• Store cards were used to support customer acquisition and merchandise sales
• Insurance was offered for life, income and disability protection with family and individual benefits
• Products were positioned to reward and retain valued customers
"We support the Group's profitable growth in retail market share by developing and maintaining the right relationship with customers across our primary financial service products." (Mr Price Group, 2014: 45).

Store D strived to be at the leading edge of fashion, to offer merchandise at prices that people could afford; it allowed their items to remain desirable. They operated on a cash sales basis to avoid credit and debt traps. They achieved targeted rates of sales and profit growth through investment in an innovative business model, merchandising, supply chain, logistics and information. (Mr Price Group, 2014: 7).

High LSM Store A and C

Personal Observations

Store A offered payment options via cash or variety of debit cards such as Visa, MasterCard, American Express, Discover, JCB, Diners Club, PayPal, Apple Pay and Gift Card. Store C offered payment options in store through debit card, credit card and cash or gift card. There were no new payment options or online instore services promoted in either store. Store C did not advance to the new screen display system by the point of sales, as with the other stores.

Focus Group Observations

Participant 2, 3 and 4 noted that there were no new methods of payment at Store C or A; all offered the standard card and cash payment options at point of sales only. Participant 2 and 3 noted that Store A had a point of sales dedicated to each department, which provided comfort as one could choose to pay at either point.

4.7.2 In-store Technology

Middle LSM Store B and D

Personal Observations

Interactive digital pads were installed, on a long narrow bar height counter, for customers use to gain access to Store D's website. This device informs customers about the merchandise and prices before making a purchase. The sales personnel could assist the customer, in locating a specific item in another store, via the online system. A digital screen was located by the entrance way into the fitting room area and projector screens were installed in the ceiling which projected graphics onto the walls, above eye level (Refer to Figure 4.75).

Focus Group Observations

Participant 3 and 2 noted that no new technologies were integrated in Store B. Participant 3 noted LCD screens in the "Body" section, playing a video, and a large flat screen integrated into the point of sales counter.

At Store D, Participant 5 was informed that they no longer printed slips; they emailed the receipt to save paper. For this, personal information such as email addresses were required. Having gained such information from the customer, it enabled Store D to capture purchasing data and it allowed Store D to send customers promotional advertising in digital format.

Participant 4 had an experience in Store D, where they introduced a different payment system to her. If the customer only had one or two items to purchase, then one was directed to smaller, individual pay point units.

None of the stores offered any reward card or loyalty card system and did not offer SnapScan either, as Participant 3 inquired at all stores. However, Participant 4 found that Store B was introducing account cards. Previously one could only pay with cash or card and now one was able to open an account; Store D already had an account option. However, none of the high LSM store offered this option. Store D had recently broadened their online account to international purchases and deliveries.

Participant 3 noted that 3 out of the 4 stores had an advanced sales point. Stores D, B and A had horizontal integrated touch screens recessed into the point of sale; it was not the typical cash register that would face the sales personnel. The customer was able to look directly onto it and watch how each item was scanned into the system before payment was made. The only store that had a more conservative sales point was Store C. Participant 4 also noted the integrated touch screens, mentioning that this was the latest technology, but it had subsequently become standard in most stores targeted at a younger market, such as Store D and B.

In terms of technological advances, Store D won over Participant 4; as the recessed flat screen, integrated in the point of sales, could be flipped over to allow a customer to sign or type something onto the screen; other stores did not have this feature.

However, it was felt by Participant 3 that South African based stores were not on par with the newer technologies on offer. Overseas stores were integrating smart mirrors, which enabled viewing of different clothing options on oneself. Through the smart mirror or having walked through a scanner, it would indicate which garments would fit to result in less time wasting whilst trying garments on, as it assessed one's body shape, body type, hair colouring and even your age.

Public Domain

Store D's group mentioned that customers have begun to move with much greater fluidity between physical, mobile and PC-based interfaces. Accordingly, it was critical that brands created customer experiences that fused the physical and digital worlds (Mr Price Group, 2014: 28).

Technology brought a limitless amount of opportunities; thus, it was important to stay on top of these advances to ensure that stores were engaging with customers in new ways (Chain store age, 2014). The innovation of digital screens that have been introduced in Store D and Store B, allowed for the engagement with customers in store. Technology also allowed companies to engage socially, through digital social media, and helped in developing relationships with key fashion bloggers from around the world who connected with customers to share good reviews about the brand (Chain store age, 2014).

Store D strived to promote social media devices in store and out; it had become a popular advertising tool for Store D. One could connect with them via Facebook, Instagram, Twitter, Pinterest, their blog and their official website launched internationally in June 2013. They have shipped to 71 countries; top destinations were Australia, New Zealand, UK and USA. The basket size is 60% higher than local with an average delivery time of 3 working days. Store D was the 1st SA retailer to trade in multi-currencies with product pricing viewed in 1 of 6 major currencies dependent on the country of order (Mr Price Group, 2013: 43). Store D maintained an omni-channel retail approach to leverage multi-markets, together with social media platforms, to engage with customers. The store footprint was supported by a strong e-commerce capability, which allowed customer access to a full assortment online (Mr Price Group, 2014: 35). Store B was active on many social channels and had heavily invested in their social media presence in ecommerce which drove more online sales (Rajeck, 2015). Store B aimed to be a global clothing brand by growing their e-commerce business at the same time. A big part of their strategy was to distribute product shots and show offers using social media (Rajeck, 2015).

White timber cladded walls

Customers can use digital screens to access stores website to find out more info about a product

The Base is white making it feel less heavy

Broad top of the unit is constructed using timber, with timber veneer finish

Screens are fixed into their own display unit at standing height

Figure 4.75: Digital pads in Store D.

(Capetownsdarling, 2014)

High LSM Store A and C

Personal Observations

Both Store A and Store C have grown significantly by providing a variety of online services to make online purchases, online advertising, marketing, receiving customer feedback through commentary, having developed a well-structured delivery service and creating a user friendly and beautifully presented website. They also had Pinterest and Facebook pages, a mobile app layout, including Instagram product imagery all for successful e-commerce services. However, there were no new instore technologies presented in Store A and C, besides the security screens in Store A.

Focus Group Observations

Participant 3 noted that Store C appeared to have a standard computer monitor screen at their point of sales which looked to be quite an older system compared to other stores. Only Store B, D and A had integrated screen systems placed under their sales counter. However, Participant 4 noted that they did ask for your contact details to inform one via email or SMS about any promotions in Store C; no new technologies were noticed by any of the other focus group participants.

Public Domain

Store A used technology throughout their supply chain and worked through a constant flow of information. Store A had developed a way to transfer information very easily through a well-structured IT system. They developed a quick response system which ensured a quick information flow, within the company, which created better value for their customers. The system helped find out more about new market trends to react to as quickly, efficiently and effectively as possible. Their point of sales system collected a variety of information in order to provide feedback to design teams and report customer trends (Dawson et al., 2006: 77). The stores' product ranges were based upon local sales data collected (Dawson et al., 2006: 77). Personal digital assistants were used as a key tool, which emphasised information as an aid in decision making (Dawson et al., 2006: 77). Their point of sales systems information collected ensured that they had a successful supply chain. They worked closely with their suppliers to plan and produce inventory quicker and more efficient (Grewal et al., 2014:27).

Store A utilized the data collected from customer service phone calls; the comments and suggestions submitted allowed them to improve the service they received in the different sales channels (Inditex, 2014:97). Mobile phone applications were also developed to provide information on the availability of an item in store (Inditex, 2014:97). The item could then be located and booked in advance for online orders. A new item locator service was introduced to meet the demands of the Spanish market in several of their provinces (Inditex, 2014:97). Training days and seminars were held for store teams which placed an emphasis on customer service and staff awareness. In addition, specific team members were selected to assess and improve these aspects (Inditex, 2014:97). In continuously seeking out and using innovative technology throughout their supply chains, they reduced costs and provided value for their customers (Grewal et al., 2014:29).

With the emerging e-commerce market, businesses have been able to make use of the internet in reducing costs (Zhenxiang and Lijie, 2011:197). This associated with

purchasing, managing supplier relationships, inventory and developing relationship with customers to create customer brand loyalty (Zhenxiang and Lijie, 2011:197). Communications conducted, via e-commerce, allowed for differentiation between brands through customer service and customers being able to research on a product prior to making a purchase. Delivery infrastructure and transaction systems have also grown due to e-commerce availability (Zhenxiang and Lijie, 2011:197). Overall, major factors which affected online purchasing decisions involved price and quality of goods, brand recognition, after-sale services, customer feedback, speed and quality of delivery, promotions, advertisements and user interface of websites (Zhenxiang and Lijie, 2011:197).

Store C allowed one to create an online account with the store, which enabled the customer to navigate the checkout process faster, store multiple shipping addresses and view and track orders in your account (Kingsley Heath, 2015).

4.8   Globalisation

The following observations spoke to the research question in understanding how store design became influenced by apparel global retail design trends.

Personal Observations

During the time of visiting and revisiting the four stores, the middle LSM stores made several changes to their store layouts. Store D's floor displays grew in height, which compromised the floor space and cornered off areas which resulted in smaller spaces. Seating areas were included to accommodate for females when fitting on shoes; this compromised space allocated for shoe display and ease of movement through aisles. The high-rise wall displays were difficult for female shoppers to reach the garments, which required customers to ask for assistance to find the size they required.

Both Store B and D included more merchandise display units and placed feature displays closer to the front of their stores' entrance way. This resulted in a cluttered entrance, which made a smaller entrance way to access and exit the store. It was seen as advantages in order to attract customers in the store, however from a design perspective it created discomfort through congested traffic at their main entrance.

What was noted from these changes, was that Store B and D made similar choices in design interventions. Throughout all the aspects discussed in the various store image attributes they were the most similar to one another in store image.

Globally, it was noted that between the middle LSM stores it was the affordability of the design changes implemented. Store D used more standard and lower quality materials to Store B. The merchandise sold in store was the focus and not the design, as they wanted the customer to see an abundance of merchandise rather than an abundance of design. Store B made it clear that they wanted to incorporate design which enticed the customer to the merchandise through the integrating of various finishes; in this way their store identity differed. They spoke a common language in design implementation methods. They had similar store layouts, where both stores had female merchandise on the right and male merchandise on the left. Both had feature displays close to the entrance however, their method of representation to the customer differed in quality and hierarchy in store. Store D placed more emphasize on advertising graphics and displayed prices in big and bold signage. Store B used pricing strategies as promotional techniques, such as the sale incentives of scarves at the till points for a lesser price should one wish to purchase items over the value of R100.

To a large extent the similarities indicated the competitive nature of the middle LSM stores but each store wanted to portray their unique identity through smaller elements. Store D had signage, which locally represented the store, which emphasised their brand of price; they were a local, affordable South African brand. Store B had signage in store, which depicted their store on a global level, which indicated that they were an Australian brand placed in South Africa.

The high LSM branded stores were completely opposite to one another. They differed significantly in design, store size, location and signage. Store image attributes spoke to their unique store identity. Store A implemented the same store design in South Africa to that in any other country. They did not strive to change their store design to suit the country in which they are placed. They did not strive to show a South African identity; however, they did strive to show high quality in merchandise and store design. Their finishes were of high quality, and consistently portrayed this same store image in every country which strengthened their store identity. Store C was an African luxury brand, they strived to portray this store image in their store design through their unique bespoke elements in store, seen in their merchandise, display units, furniture, fittings, signage and even door handles. The high LSM stores indicated investment of their store designs; they chose design over price. Both stores celebrated their store identity in portraying a unique store image. Globalisation influenced store image however, globalisation extended to the middle LSM stores more so than the high LSM stores. The middle LSM stores were influenced by economic resources, competition, culture

and technology. Their store image was viewed more similarly than differently. The high LSM stores varied in store design, thus each portrayed a different store image and identity.

Focus Group Observations

All participants agreed that globalisation influenced and dictated the design of the four stores visited. A Participant 4 mentioned that the design of the stores was influenced in the same way as fashion had been influenced in South Africa. Inspiration was derived from the latest trends and international standards and then translated and integrated into what we wore, the music we listened to and which types of movies we enjoyed watching. These changes became unnoticed as it was already deeply embedded in our culture and those same influences were fed through the design process and development. Furthermore, social and environmental climates largely influenced design.

Participant 4 made a social reference to women who actively worked during the war and were required to dress in a certain way. In turn their style of dress, for work, influenced the way interior spaces were designed during that period. Environmentally conscience design was a growing market due to mass production that influenced the lack of natural resources in South Africa. Through this approach; designers were constantly influenced by global events which dictated design through supply and demand, leaving apparel retail store designs being influenced due to the connection to a strong globally influenced fashion industry.

When participants observed and analysed Store D versus Store B, their store layouts were seen to be quite similar in many ways. Participant 3 felt that Store D conducted research about similar apparel stores and took their cues from international brands such as Store B, having seemingly became a replica of this international brand. Local apparel retail stores have fashioned and moulded their store designs to become replicated versions of a particular international branded store, within a certain income bracket, suited for that particular store. In cloning these stores, South Africa was becoming a global village and its identity became lost in the world of retail apparel store design. She argued that due to the frequency of South Africa crossing borders; it would not matter how much of a global village it became.

A store that Participant 3 was particularly impressed with; was Store C. Store C presented themselves as an African luxury brand store however, their store image portrayed an image that Participant 1 viewed as British and colonial. With emphasis on

the importance for South African brands to portray who they are, it ensured that its cultural heritage was not entirely lost to the embracing of global views implemented in everything. Participant 2 indicated that it became difficult to differentiate between what was native to South Africa or what was derived from international standards, as the locally branded stores were similar to the internationally branded stores designs located in South Africa. Participant 2 stated that it became difficult to analyse Store C specifically because he had not known about the stores' existence prior to the study. He noted that it was a local branded store that located itself very well internationally, in Dubai, and locally there was only one store in each province.

Participant 2 (2017) said *"retail is so fast paced to such as extent that we don't know that whatever we have seen that side will be landing in SA in the next two or three years as a result"*

Despite South Africa being described as a global village by Participant 3. Participant 1 identified that there were subtle nuances that participants noticed in each local branded store. There were many things that influenced people in a social climate that were not exactly the same in each country or even city we may live in or visit. Even though we were globally influenced, there were certain things; such as the language used in the advertising at Store D, that was uniquely local. The quoted texts included in Store D stores advertising posters would not have made any sense anywhere else in the world however, due to it being one of the ways that we communicated with one another in South Africa, or in Cape Town, it contributed in a big way in adding a unique finger print to a local branded store.

The visual identity of the stores was questioned by Participant 4. When questioned whether or not a store design that represented South Africa would even be successful when the target markets of these stores are expecting a global design. Participant 4 mentioned that Store D made attempts to add a catch phrase here or there to represent South Africa in some way whilst the rest of the store remained quite global in design. But it was questioned whether that hint of familiarity would be enough to create an identity that is suited to all South Africans.

Participant 1 mentioned that retailers were responding more from a point of economic viability, rather than having tried to make something that was uniquely South African. Participant 4 stated that visual identity was strongly represented internationally therefore, local branded stores such as Store D strived to be economical rather than visual. Store D emphasised throughout their store design that their focus lied solely on

the price point. Big graphics or posters were used to indicate the price to their customers at every turn. Store D has chosen to spend less on their design so their store and brand could also become more profitable.

In terms of location of stores, Participant 1 mentioned that each store's location was chosen to match their store identity. Participant 1 stated that there was a sense of knowledge of the type of people who live in the area and who would frequently visit that particular mall, to appropriately have attracted customers to the store. V&A Waterfront versus Canal Walks store layout was slightly different as their target market was slightly different. The Waterfront was very global and more "touristy" versus Canal Walk which was situated in a business and residential district. Certain malls were also considered to be more kid friendly whereas Participant 1 felt that V&A Waterfront would not be a mall she would take her kids to when she needed to go shopping. She also clarified that she would not choose V&A Waterfront mall to shop at frequently, as other malls were more economical for her to visit. V&A Waterfront was a more upmarket mall. Store A had placed themselves in a different type of mall than Stores D and B typically would. Store A preferred to locate itself in big A-grade malls such as Tygervalley and V&A Waterfront. One would not find a Store A outlet in West Gate mall, Vangate mall or N1 City mall. They had placed themselves in malls, not only in terms of their store image but also to attract customers according to a certain target market and income bracket in a particular location or area.

Participant 3 elaborated on an experience she had when visiting Milan. She witnessed an advertisement for a gallery. It showed a white woman with a big black Afro and a black woman with a blonde wig sitting on an ottoman, dressed in African print from head-to-toe. Then she saw a display in a shop window, in Europe, that was promoting Africa by selling African inspired bags. Many of these bags hung on a bicycle in the display window and all the prints used, to make these bags, were African inspired with African beaded necklaces all included in the display. She expressed that she was a little bit tired of the extreme international globalisation effects that we were experiencing. When internationally they are yearning to receive South Africa's beautiful prints and beautiful apparel to celebrate and appreciate, however in our own country we did not have that same celebration and appreciation implemented in local brand store designs. She felt proud to be South African when she saw the apparel and how people were keen to wear it and how apt it was. Unfortunately, in our own country it was only smaller boutique clothing type shops that had these beautiful prints, in a celebration of colour that came through in the fabric. When purchasing African inspired items from these boutique stores, the prices were often exorbitant. Participant 3 would

not have understood about her discovery in Europe if she were not South African, recognising it only because she was a local travelling abroad. Participant 1 (2017) said: *"You can only know if you are different when viewing it from the outside."*

Participant 4 felt that when it came to South African identity, it was such a grey area as there were so many cultures in this country. When African culture was discussed, it was questioned whether it really was South African or not? South African culture was an umbrella term, under which many different nuances were derived from many places within it. However, one still needed people that could pick up on those nuances and essence to show it to the world. Participant 4 (2017) said: "*South African culture is not clean cut.* "

Participant 1 mentioned that there was minimal global reaction to globalisation as well as minimal localisation. Europe had realised that this global-created image was too strong; they made a change to bring in something more distinctive. They decided to take action, to cause a different reaction, in the apparel retail industry. Whereas, in South Africa our already distinctive cultures were not portrayed to its full capacity in stores but rather adjusting to the "global norm". There were no large-scale stores in a mall that said; I am African; I am South African. We also did not have mass production systems in place like in America, China and India. South Africa did have their own, but due to globalisation all our large-scale factories have closed. Until South Africa was properly able to address this problem; we would not see these unique garments or stores.

Store B was an Australian brand, but when asked if participants identified the store as such, Participant 3 felt that Australia and South Africa were very similar as both were situated in the Southern Hemisphere; which influenced the way of living in similar ways. When asked if participants identified Store B as European, there was an immediate and unified "No" from all participants. Instead, Participant 1 stated that Store C and Store A were the stores that participants felt were more European influenced. This was interesting as participants were able to identify and agree upon a certain store image for a particular store. Participant 1 elaborated that mass media, marketing and personal experience through visiting other countries, or experience through viewing movies or cultural aspects, allowed one to identify a store image more clearly. Due to warmer climates, Australia had clothing for ease and comfort; the style reflected was more relaxed. Europe was about understated, beautiful, classy, streamline, trendy fashion; the type of stores one tended to shop at reflected one's lifestyle. This was also interesting, as in Cape Town one would see a different type of culture versus that of

Johannesburg. Subsequently, it was also dependant on which areas in Johannesburg one resided. Only certain parts of Johannesburg were more opulent; this indicated that location influenced culture and lifestyle.

5. CHAPTER FIVE: CONCLUSION AND RECOMMENDATIONS

Appadurai (2010: 254) introduces the notion that *"Globalisation is a speeded-up movement of people, space and place".* Through his anthropological approach to issues of globalisation, consumption, culturalism and ethnicity in a modernist society, he focuses on geographies within these issues. He emphasises that "*local is just as important as the global*". This position speaks to the focus of this study - South Africa and specifically chosen stores within the Cape Town area. In this study I present an analysis of a specific area/site to determine how localities emerge in a globalising world. It explores how globalisation has influenced store image in South African apparel retail design.

In this chapter I offer a conclusion to the discussion of store themes identified, respond to the original research questions and contribute to academic literature in the field of apparel retail design in South Africa. The research indicates the importance of South African design in the retail sector and recommendations are made, which could be of interest to apparel retailers, interior designers and students of design. Suggestions for future research in this field of study are also presented herein.

In order to offer a structured review of the study's findings seven store image attributes are summarised. These attributes are: atmosphere (tangible and intangible design), convenience (shopping ease, convenience of facilities), facilities (store layout, store appearance, fitting rooms, fixtures), store reputation (store identity, brand identity), merchandise (style, quality), promotion (advertising, displays), and service (payments and services, technology). The store image themes are introduced with a short introduction responding to the following sub-questions:

a) *To what extent are local and global retail brand store images similar?*
b)   *Why has this occurred?*

Following the attribute summaries, a holistic response is presented in order to answer the main research question.

5.1   Atmosphere

5.1.1 Store Interior (Tangible design elements)

The interior design of Store A and C differed in all aspects of tangible design elements. The high LSM stores portray consistent investment in store design, presented in all

tangible design aspects to create individual store identities. Middle LSM stores do not place design as central to their store interior design strategy. It appears that middle LSM stores have more budget constraints, due to the similarities observed in store bought finishes, fittings and fixtures.

5.1.1.1 CLEANLINESS

Within the middle LSM stores, all participants concurred that Store B is cleaner than Store D. According to all participants, cleanliness is similar in both high LSM stores. It was observed that elements of the store interior such as spatial quality, display design, maintenance and aesthetics influenced the perceived view of each store's cleanliness. The data indicates that cleanliness influenced store image equally in middle and high LSM stores. The store image of Store D was found to be negatively affected by the lack of cleanliness.

5.1.1.2 SPATIAL QUALITY

With regard to spatial quality, Store B was perceived differently to Store D by participants. Both stores are similar in that they house multiple brands under one brand identity in one store. The size, location and shape of the store influenced spatial quality in three ways. Firstly, the size of their store produced limitations for Store D to cater for multiple brands, causing them to exclude a part of their product offering. The exclusion impacts customer expectations of the product offering, as the brand is known to house a children's clothing range. Secondly, they overloaded their small store with apparel despite the exclusion of the children's clothing. As a result, the crowded space became overwhelming for all participants, impacting the spatial quality negatively. Thirdly, they excluded the children's clothing range in order to align themselves with their store location, situated in an upmarket tourist mall. This indicates that their product offering changed to accommodate for the malls target market rather than the store target market.

Regarding spatial quality in the high LSM stores, there were differences observed due to the store size, layout, design, structure and aisle placement in each store. Data indicates that the spatial quality of A and C contributes to comfort and shopping ease, thus influencing store image.

5.1.1.3 AESTHETICS

According to all participants, distinctions were observed in aesthetic between Store B and D whereas Store A and C differed significantly in aesthetic appearance. Distinctions were observed in finishes, fittings, fixtures, colour variation and visual merchandising design.

Store B offers consistency in aesthetic, an array of considered finishes, fittings and fixtures and subdued colour variance. Store D offers no exclusivity in aesthetic appeal, adaptable to any outlet, standardised finishes, fittings and fixtures, store bought visual merchandising displays, and bright colour variance provide the visual impact.

Store A portrays a minimalist aesthetic through minimal colour variation, consistency and simplicity in finishes, fittings, fixtures and visual merchandising. Store C's aesthetic efforts portrays a strong sense of exclusivity and sophistication through custom designed visual merchandising, rich quality finishes, dark colour variation, and consistency in detailed fittings and fixtures. The aesthetic variations appealed to all participants as several store design aspects were considered for the high LSM stores. Data indicates that each store's aesthetic appearance contributed to individual store identities. It communicated to participants by means of aesthetic impression.

5.1.1.4 STRUCTURE

Store B and D are similar in not providing a measure of additional purpose to structural columns. Visual merchandising displays placed around columns were used to maximise on the amount of merchandise included in the store, rather than focus on the structure. They were not used to maximise the space or improve circulation thus influencing the store layout.

Store A and C's structure was addressed differently to define a specific store layout. Store A concealed columns effectively through the use of mirrors, maximising space through reflection and offering a sense of relief to customers. Store C has no columns, utilising visual merchandising units to create clear directional pathways. Store C reduces free movement by creating controlled pathways. Store A allows for free movement, and reduces control. Columns are not seen as physical obstructions in the store layout.

5.1.1.5 WALLS

Store B and D are similar in that they incorporate varied finishes for the walls to distinguish various areas; both have brick walls which are painted with a slatted walling system installed over. Store A and C differs quite significantly in colour, style and detailing for wall finish and design. There is a distinct contrast between the high LSM store walls. Darker versus lighter finishes, minimal design versus detailed design.

This indicates that the middle LSM stores do not invest in custom designed display mechanisms. They invest in store bought wall finishes and display fixtures, possibly due to budget constraints. The high LSM stores invest in store design as display units are custom designed to suit individual store identities.

5.1.1.6 FLOOR

Regarding flooring, Store B and D vary in floor finish choices but are similar in purpose. Store A's floor finish is cohesive and consistent as the same floor finish is used throughout their store. The implementation of their floor finish links to their overall aesthetic, due to the minimalistic use of colour and consistent use of clean lines and 90-degree angles. Store C's aesthetic consists of layering of textures, detailed finishes and fixtures. The floor finishes are addressed in a similar manner, utilising concrete flooring throughout but loosely laying rugs over the floor. This creates contrast in textures. Data indicates that both middle LSM stores alternate between different types of floor finishes which are used to distinguish different merchandise areas and create pathways.

5.1.1.7 CEILING AND LIGHTING

Differences were observed in Store B and D's ceiling and lighting choices. Store B utilised various ceiling and lighting to distinguish areas and inform circulation. Large directional spot lights hang from the herringbone ceiling. Pendant Lighting is utilised at different heights and a track lighting system is integrated within the herringbone and timber panelled ceilings. They also included wall washers on the wall's perimeter, downlights more centrally placed; and decorative fittings over feature areas.

Store D repeatedly utilised standardised, store bought 600 x 600 ceiling boards and spot lighting. It became apparent that the incorrect use and overuse of lighting in certain areas in Store D increased store temperature causing discomfort and glare. The

abundance of pendant lighting in one area caused a degree of discomfort as many pendants were not required in that area. This indicates that's the type and amount of lighting can influence the store experience.

Store A and C utilises lighting as an opportunity to highlight specific zones or apparel displayed in visual merchandising units within the store. Various types of ceiling and lighting choices have been incorporated in store in an aesthetically pleasing manner to create contrasting store atmospheres and to suit the store identity.

The ceiling in Store A has been lowered; creating a large continuous bulkhead. A wide shadow gap runs along the entire outline of the bulkhead with recessed lighting embedded around the rim. Recessed LED strip lighting is installed on the top and bottom of each display unit.

Store C includes ambient lighting which creates much dimmer general areas. Custom designed chandeliers have been used as feature lighting with directional spotlights built into the sides of the display units. Data indicates that Store C's lighting choices created ambient spaces, whereas Store A's lighting choices accented areas.

5.1.2 Atmosphere (Intangible design elements eg. The senses)

The store atmosphere created in Store A and C differed in all aspects of intangible design elements. The high LSM stores invest more in creating a retail store identity. This is apparent in their high-quality finishes, garment fabrics and custom designed visual merchandising display units. All participants observed that all aspects of the store environment were considered in high LSM stores in order to create an enjoyable shopping environment. The store image of Store C communicated to the shopper that a designer was involved. Store atmosphere is not influenced by globalisation, but it does influence the store image and identity for high LSM stores.

Intangible design is noticeably more prominent within luxury brand stores identified in the high LSM bracket than the stores observed in the middle LSM bracket to create a store atmosphere. All intangible aspects of store atmosphere have not been fully considered for middle LSM stores as all participants encountered discomforts in store.

5.1.2.1 SIGHT (COLOURS, DÉCOR AND NEATNESS)

Regarding sight influencing the store atmosphere, distinctions were observed in colour choice, colour placement, fittings, finishes, quality and neatness. Clear discrepancies were observed by all participants in both high LSM stores' visual dynamics. All participants observed that Store B's visual aspects strengthened the presence of their store identity because they are more specific in what they want to achieve in each section of the store. Store B created variation in the visual aspects of the store, using different colours and finishes according to the merchandise in each section creating a memorable store atmosphere through visual differentiation.

Store A's visuals included no props, only full body mannequins and apparel, minimal colour, reflective, light finishes and neatness offered in an ordered and structured layout. Store C's visuals included props, half torso mannequins and apparel, dark colour choices, detailed and textured finishes. The differentiation in visual impacts of the store, helped to create the visual identity of each store.

5.1.2.2 SMELL

Differences in odour was unpleasantly noticed by all participants in both middle LSM stores and pleasantly noticed in the high LSM stores. All participants noticed an unpleasant smell in Store D. The focus group discussed possible causes to be; food, chemical cleaning detergents, storage of merchandise in boxes and in the factory warehouse; more perceptible due to the large quantity of merchandise in store. Other contributing factors included inadequate ventilation, influencing the spatial quality. Store B had no particular odour, due to adequate ventilation.

Store A had no consistent aroma throughout the store. Each merchandise section displayed male, female or kids' store branded fragrances which attracted all participants. Store C had an appealing, consistent aroma throughout the store created by their store branded fragrance which can be purchased in store. The data indicates that Store D's unpleasant odours influences the store experience negatively. The technique of utilising unique fragrances to entice customers, contributes to the high LSM stores identity.

5.1.2.3 SOUND

Differences in music volume was noticed by all participants in the middle LSM stores. Music was hardly noticeable by focus group participants in the high LSM stores. Store D playing loud music through a radio broadcast specific to their store. Store B playing music at a lesser volume. Both types of music appealed to their target market. Data indicates that focus group participants did not enjoy the loud music played in Store D. It influenced the store experience negatively as it did not promote a calming environment for the shopper, in addition to the visual chaos.

The subtlety of the music in Store A did not impact the store experience. The minimal use of sound in Store A matched their minimalist design approach, thus contributing to their store identity. In my observation of Store C, music was played at a significantly loud volume. All participants however did not recall hearing music in Store C. They expressed that Store C did not require music as their store environment was already visually impactful and included a stimulating aroma. The data therefore indicates that music is one of many store atmospheric cues which can be utilised to enhance or detract from the store image.

5.1.2.4 TOUCH

Differences in quality, variety and integration of finishes influenced store atmosphere in both middle LSM stores. Differences were felt in textures, finishes and material quality by all participants in the high LSM stores. Spatial quality provided limited access in Store D for customers to engage with the apparel. Touch influenced the perceived view of the store image. Store A focuses on showcasing merchandise in a minimalist design approach. The abundance of white finishes as the stores backdrop, emphasises interaction with apparel. Store C's finishes and material quality is authentic to the touch, articulating detail and texture. The store experience created through touch, represented distinguished store identities.

5.2   Convenience
5.2.1   Shopping Ease

Regarding shopping ease, clear distinctions were noted between the middle LSM and high LSM stores. There is more merchandise on display in middle LSM stores. The high LSM stores provides merchandise exclusivity by limiting the number of garments on display. There is more information displayed in middle LSM stores than in high LSM

stores, communicated through signage and graphics. Data indicates that middle LSM stores rely on graphics and signage to communicate their store identity. They are merchandise driven instead of design driven, this could be due to budget constraints. The high LSM stores focus on creating a store identity through implementation of tangible and intangible design aspects rather than inform their customers through advertising techniques. They design an experience in order to sell their apparel and have distinct individual store identities.

5.2.1.1 EASY TO FIND MERCHANDISE

Ease of finding merchandise differed between middle and high LSM stores. Differences were noted in store size, spatial quality, layout, visual merchandising displays, variety of merchandise and merchandise groupings which influenced ease of finding merchandise. What was enjoyed by all participants in the middle LSM stores is the clear and visible signage assisting in shopping ease. The ease of finding merchandise influenced the store experience. Store A's store size is large accommodating for more merchandise style and variety, they include kids' apparel, provide style solutions in how merchandise is grouped, and utilise a structured layout and designed visual merchandising displays to provide shopping ease.

Store C's store size is small, offering less merchandise variety and style, with no kid's apparel offered. Majority of their garments are folded providing limitations for product viewing. Focus group participants identified that they have intentionally displayed garments in this manner to provide a more personalised shopping experience, which involves the sales assistants help and guidance to create shopping ease.

Each store displays minimal amounts of garment types and sizes in store, which creates merchandise exclusivity. All participants observed minimal usage of signage and graphics in the high LSM stores to provide information about the merchandise, only the merchandise tags are accessible to view the price. Participants mentioned that the lack of information is deliberate as it is assumed that the customer expectations of high LSM store shoppers focuses more on quality than price.

5.2.1.2 STORE ACCESSIBILITY

Visual merchandising design and placement limits accessibility in Store B and D. The design and placement were altered during the course of the research in both stores to

accommodate for more merchandise. It influenced merchandise accessibility, the spatial quality in store and by the entrance.

Store A and C's store accessibility differed due to store size and entrance size. Focus group participants identified that Store A was the most accessible store out of all four stores observed due to spatial quality, layout and large entrance. Store C was the smallest store out of all four stores visited. Focus group participants identified that the store accessibility did not impact on their store experience, as the store design conveyed exclusivity.

5.2.1.3 STORE FAMILIARITY

Each store differed in store familiarity due to location, store size, façade design, spatial quality, merchandise variety & signage. Both store brands are familiar and well recognised, as they have both been visited before by all participants. They are located next door one another in an upmarket tourist mall, providing opportunity to increase customer volumes as they cater for a similar target market. Their proximity offers a competitive advantage.

The store atmosphere and interior in Store C provided an enjoyable shopping experience for all participants. Both high LSM stores offer exclusivity in store location and merchandise offering. They both portray individual store identities.

5.2.2 Convenience of facilities

Store B and D provided suitable facilities for their respective store sizes. Similarities are prominent in the design of the point of sales between the middle LSM stores. Both Store A and Store C provided sufficient and convenient facilities appropriate to their respective store sizes. Due to the significant differences in which they chose to design their facilities, each store was able to portray a unique store identity. Store A provides a higher level of convenience for customers through further accommodation of additional instore facilities. Store A offers a simpler shopping experience for the customer by providing more facilities than necessary to create comfort and accommodate convenience for all who visit.

5.2.2.1 POINT OF SALES

Many similarities were observed between Store B and D in convenience of the point of sales. Store A has more facilities than Store C, providing more than one point of sales. Each middle LSM store's point of sales is long, large, has 7 till points, includes a queue management system and provides merchandising impulse buys. They only differ in storage provided, which impacts safety & security. Store D has lockable storage and Store B's storage is easily accessible.

There is a point of sales positioned in each merchandise section within Store A for convenience which was enjoyed by focus group participants. Store A and C's point of sales differs in design, colour and style. The design of each stores point of sales conveys their store identity, however the number of point of sales provided and placement thereof only influences the store experience.

5.2.2.2 FITTING ROOMS

Convenience of fitting rooms in Store B and D differed in location in store, number of cubicles per gender, design, style, size, layout and finishes used. These differences influenced the fitting room experience.

Store A has fitting rooms in each section which are simplistic in design and layout. The fitting room lobby area design created a memorable space and environment for all participants. Store C only has two fitting rooms which exuded African luxury; enjoyed by all but one participant. Participant 2 questioned the appropriateness and luxuriousness of it. Each store fitting rooms differs in position in store, size and design. Convenience of the fitting rooms influences the store experience but the design is influenced according to the store identity.

5.2.2.3 REST AREAS

Store B and D provided rest areas in the fitting rooms and footwear area. They differ in placement and design. The rest areas in Store B contributed to a memorable shopping experience according to all focus group participants.

Both high LSM stores had rest areas inside their fitting rooms and within their store. The rest area in Store C was enjoyed by all participants, as it was curated aesthetically to compliment the store atmosphere and link to their store identity.

5.3 Facilities

5.3.1 Store layout

The middle LSM stores and high LSM stores varied in their designed store layout. The middle LSM stores layout is not fixed. Standardised fittings or display units are used which can easily be implemented in any sized store. The high LSM stores provided different store experiences through different degrees of spaciousness. Display units are specifically designed to suit the store design & layout.

5.3.1.1 AISLE PLACEMENT

Aisle placement influenced store layout due to spatial quality, store size and the abundance of merchandise on display in both middle LSM stores. Store B sells kids' apparel, but they did not create wide enough aisle spaces to accommodate for trolleys or prams. Paths are clear, with ease of circulation for two people to pass one another. Store D's aisle placement did not provide adequate space for trolley or a pram, paths are not clear, space is limited and aisles are used for display purposes.

Aisle placement influenced store navigation & layout differently in both high LSM stores. Store A is a large sized store with clear & spacious aisles, providing customers with the freedom to navigate. Store C is a small sized store, with a wide central aisle leading to a point of sales, and narrow aisles along merchandise display walls. It is easy to navigate; however, the narrow aisles provide limitations for merchandise viewing. Focus group participants consider this to be deliberate, as the sale assistant helps the customer locate the garment, rather than let the customer walk the narrow pathways. The data therefore indicates that different spatial experiences were created through aisle placement in each high LSM store, contributing to personalised shopping experiences.

5.3.1.2 SPACIOUSNESS

Spaciousness of the stores differs between Store B and D. It is influenced by store size, display unit height, and the amount of merchandise on display. The high LSM stores spaciousness only varied due to store size. Store B is a large sized store, which can accommodate for more merchandise than Store D. The display units are at a favourable height to provide a comfortable viewing distance between the customer and the merchandise. Store D is a clutter filled store due to the abundance of merchandise

housed in the small space. An uncomfortable, short and dense viewing distance is created between the customer and the merchandise.

Store A's large sized store can accommodate for more facilities, merchandise variety, wide aisle spaces and a large entrance. Store C's small sized store provides less facilities, less merchandise variety, and has a combination of wide and narrow aisle spaces. Focus group participants mentioned that the spaciousness of Store A lends itself to luxury. Both high LSM stores utilised their varied store size to create unique store experiences. Data indicates that the spaciousness of the store influences how the customer views and engages with the merchandise.

5.3.1.3 LAYOUT

Both middle LSM stores follow a similar store designed layout; menswear on left and womenswear on right. Store B has created a free-flowing layout, utilising various finishes or colours in flooring, ceiling & merchandise display to demarcate merchandise spaces. The layout structure is carefully thought through to provide privacy in female garment areas. Store D utilises different floor types to demarcate larger areas. They did not design their store layout to accommodate spacious merchandise areas; their overcrowded merchandise areas ensure availability of stock. Data therefore indicates that Store D relies on the abundance of merchandise rather than the design of the store layout to depict their store identity. Store D does however provide clear signage directive for facilities and merchandise. This indicates that Store D utilises signage as a means of inexpensive wayfinding, rather than invest in a store designed layout such as Store B.

Differences are evident in store size in Store A and C, influencing the structure of each store's layout. Store A's large store has an uncluttered, structured layout, divided in merchandise sections in a minimalist design approach. Store C's boutique sized store is also divided in sections in a detailed and curated design approach. Each store layout is unique to suit the store identity.

5.3.2 Store appearance

Focus group participants identified that Store A and C utilises a font with serifs for their façade signage. The styled font suited the store identity of Store C as an old-fashioned typeface. Store A is specifically designed to be a minimalist brand however not utilising

a minimalist font. The simplicity and elegance of the font is still suited to the subdued design elements of the brand.

5.3.2.1 STORE FRONT & WINDOW DISPLAY

Similarities were identified between Store B and D's store front & window display. Participants identified Store B's store front as clutter free, well lit, creating a sense of privacy due to its location around the corner from Store D. Store D's store front was described as welcoming and inviting due to its location, approaching the wide corner entrance. Data indicates that Store B's store front design quality differed from Store D due to the merchandise display units close to entrance & LCD screens displaying digital imagery on either side of the entrance.

Each middle LSM store has a large entrance, utilising posters in open back window displays as dividers for their transparent store front. Each stores merchandise can be seen immediately though the widely open façade entrance & window displays, leaving no element of surprise. The only difference noticed by all participants is the design and quality between the middle LSM stores window displays. Store B has mannequins displayed at varied heights, whereas Store D's mannequins are displayed at one height. Similarities have occurred in store appearance as the middle LSM stores emphasise the need to sell merchandise at affordable prices to gain profits to maintain overhead costs. The similarity in providing open back window displays allows for maximum use of their trade floor space.

According to all participants, Store A and C differed significantly in store appearance. Store A has a large, open, well-lit storefront and privately enclosed window displays in light and bright finishes. Participants identified that the minimalistic approach adopted for the interior and exterior design of Store A created the most exclusivity. The framed window displays are completely enclosed where the merchandise becomes the focal point from the outside. Once entering the store, the same simplistic approach shows off the merchandise inside the store. The merchandise is celebrated from the outside, enticing the customer to see more celebration inside the store. There are only mannequins in the window displays and no props are used. None of the other observed stores utilised enclosed window displays to create this exclusivity.

Store C has a small storefront, opened double doors with bespoke handles, open back window displays framed in dark and detailed finishes. The display covers the entire window area. A relaxed, laid back lifestyle is depicted in the curated display which

includes props. Each stores identity communicated to participants by means of store appearance.

5.3.2.2 FAÇADE SIGNAGE

Focus grouped participants identified a disconnect between Store D and B's signage typography. They do not represent a minimalist brand; however, their signage is minimalist in font type, clear and identifiable with no serifs. Each store has two signs, a main brand signage and an extension bracket with a suspended logo and name for shoppers approaching from the passage. A difference was observed in the newly developed brand signage for Store D. The brand name has been shortened to an abbreviated form, bringing them in line with a new and fresh brand identity suited to their young target market.

There are clear distinctions between Store A and C's façade signage. Focus group participants identified that if the signage were to be removed from Store A's façade, the store brand would still be clearly identifiable due to the minimalistic design approach of the store front. There is a consistency in design for the store exterior and interior of Store A, which creates an exclusive store identity. Store C's signage and logo is consistent in their store interior and exterior. The repetitive use of their façade signage strengthens the brands presence. This indicates that Store C relies on their signage and logo to inform their brand identity. Store A's identity is recognisable without their façade signage due to their consistent store design approach.

5.3.3   Fitting rooms

The fitting room experience for both middle and high LSM stores was influenced by the look and feel, fitting room size, layout, number of cubicles per gender, finishes applied and whether it was conveniently located for customers.

5.3.3.1 LOOK AND FEEL

Signage and graphics influenced the look and feel of the middle LSM stores fitting rooms. The look and feel of the high LSM stores fitting rooms differed due to size, finishes, fittings, functionality and design approach. Visual interaction was created in both middle LSM stores fitting rooms through the use of fun & humorous quotes which was enjoyed by all participants. The fitting room cubicle doors provided less privacy than Store D, as Store B provided a gap below for ventilation. The fitting room design

of Store B was described as sports facility locker themed by focus group participants. The functional and practical design of Store D's fitting rooms appealed to focus group participants. They were considered more comfortable and spacious that Store B. The look and feel of both middle LSM stores fitting rooms resonated with their store identities.

Store A provided the fitting room basics required, such as a seat, mirror and hooks. The simplicity of their finishes and fittings seemed appropriate due to their minimalist design approach. Store A's fitting room was however not as functional as Store C. Curtains are hung at each cubicle providing privacy limitations according to all participants. Store C has full length louvered doors which provides privacy and ventilation. Store C's individual fitting rooms are more spacious in size. Whereas, Store A's fitting room lobby area is more spacious than the cubicles provided. Store C utilises luxurious detailed finishes, fittings and décor to portray African Luxury according to all participants. Both high LSM stores provide waiting areas which provided memorable experiences for focus group participants. Data therefore indicates that each store's fitting room design approach is suited for their individual store identities.

5.3.3.2 SIZE

Differences in size was noted for fitting room cubicles in both middle and high LSM stores. In Store B, only 2 fitting room cubicles in the female fitting rooms were spacious to accommodate for a pram or trolley. All Store D's unisex fitting room cubicles can accommodate for mother and pram, sized for two people.

Female fitting rooms in Store A includes two fitting room cubicles spacious to accommodate for a pram or trolley. Male and kids fitting room cubicles are only spacious enough to accommodate for 1 person. Store C's fitting room cubicles are spacious and luxuriously sized according to all participants. The size of the fitting room cubicles influenced the fitting room experience.

5.3.3.3 FINISHES USED

A difference in quality of finishes was noted by all participants in the middle LSM stores fitting rooms. Store B portrayed a consistency in finishes in male and female fitting rooms. Store D's finishes were considered as low cost and substandard according to focus group participants. The quality of the finishes used for each middle LSM stores

fitting room design influenced their store identity. Store D's and B's quality of finishes matched their store interiors.

According to all participants, Store A and C differed quite significantly in fitting room finishes and the quality thereof. Store A created consistency in the use of light, hard & rigid fitting room finishes. The simplicity and minimalistic use of colour is carried throughout their store design. Store C's rich, soft, luxurious, detailed and dark fitting room finishes emphasised a clear distinction in quality according to focus group participants. According to all participants, Store C provided the richest experience of comfort and luxury in their fitting rooms and the design elements included matched their store design interior. Data therefore indicates that the differentiation in quality, type and colour of fitting room finishes influenced each stores identity.

5.3.3.4 LAYOUT

Both middle and high LSM stores fitting room layout differed due to store size and location in store. The data indicates that the fitting room layout influenced spatial quality, privacy and fitting room convenience in middle LSM stores.

Store A's fitting room layout is rigid and structured, cubicles parallel to one another with a large lobby area in the female fitting rooms. Store C only has two individual fitting rooms next door another, with a waiting area outside the fitting rooms. Data indicates that each store's waiting area contributed to a memorable store experience for focus group participants.

5.3.3.5 NUMBER OF CUBICLES PER GENDER

The store size and location influenced the number of fitting room cubicles offered per gender in both the middle and high LSM stores. All four stores provided an adequate number per gender according to all participants. Store B has 6 male cubicles and 15 female cubicles, 2 female cubicles are larger than the rest. Store D has 10 unisex fitting room cubicles. The number of cubicles per gender influences fitting room convenience and the store experience.

The abundance of fitting rooms, catering for each gender in Store A was enjoyed by focus group participants. Data indicates that the number offered per gender influenced convenience of facilities and store experience.

5.3.3.6 LOCATION IN STORE

The fitting room location differed in each middle LSM store. Signage was necessary in Store B to indicate location due to the store size. According to participants, the signage utilised was not clear and not gender specific. The positioning also provided exposure, limiting security. Store D's signage was clear, positioning provided security close to POS, however visual merchandising units limited visibility. Data therefore indicates that fitting room location in the middle LSM stores influenced wayfinding and security.

Both high LSM stores fitting rooms are located in close proximity to their point of sales as a security measure. Store A's fitting rooms were enclosed from the outside, offering discretion and privacy. The fitting room location within the high LSM stores influenced security, privacy, shopping ease and comfort.

5.3.4   Fixtures and fittings

Regarding fixtures and fittings, each middle LSM store incorporated them in different ways, varying in colour, but are similar in type. Both high LSM stores fixtures and fittings are custom designed to suit their store identity. Store B offered interchangeability, practicality in design, varying in colour and finishes. Focus group participants identified that their intent is to expose and showcase raw finishes and fixtures, rather that hide it with clever details. The variety of fixtures and fittings, incorporated in Store B, provide a visual dynamic as the visual merchandising units in each section varies in design integration. Store D's fixtures and fittings were described as stock standard, mass produced, low cost and poor quality, requiring maintenance. There was no customisation, special details or trimmings to differentiate them, adding no visual aesthetic appeal. It appears that Store D is more constricted by budget, due to quality observed in store bought finishes, fittings and fixtures.

Store A's fixtures and fittings were described as upmarket, minimalist and purpose made. Store C's fixtures and fittings were described as good quality with great detail expression. Both stores provided consistency in design and quality of their store fixtures and fittings. Data therefore indicates that each store communicated an individual design language and identity through the integration of custom designed fixtures and fittings.

It appears that store facilities and appearance in Store B and D was most influenced by graphics, signage & quality of finishes, fitting and fixtures to depict their store

identity. Store facilities and appearance in Store A and C was influenced by their consistency and quality in design approach to depict their individual store identities.

5.4 Store Reputation

5.4.1 Store Identity

Differences are depicted in each middle LSM stores identity. Store B is fresh and fun. The industrial loft style design approach portrays easy living, providing a sense of comfort and homeliness in the incorporation of various finishes and fittings in each section. Their store brand is described as genuine and trusted due to the quality of the merchandise. Their store design ties in with their store identity.

Store D is suited to a low to middle LSM due to the mass produced, high volumes of similar, instant fashion apparel. The store focuses on selling low quality merchandise at affordable pricing to a young market. This is evident in the large bold pricing emphasised throughout the store. The store design portrays that they are all about price and fashion, in order to attract a price conscious shopper. Data indicates that Store D overloads the store with merchandise, rather than spend on store design due to budget constraints.

Store D utilised signage and graphics to portray their lifestyle to customers. Focus group participants identified that implementation of signage gave a sense of belonging and identity. The playfulness of their brand, was portrayed in fun and humorous quotes. The language used in these short phrases defined Store D as uniquely South African, as only South Africans can culturally relate to them. Data indicates that communicating a common cultural identity is not financially feasible for Store D in store design investment, but it is feasible to portray their store identity through marketing strategies such as signage or graphic posters.

In 2016, Store D opened their first international store in Australia. This could be strategic, as their biggest competitor Store B, is an Australian brand. It appears that Store D chose to locate themselves internationally based on understanding the customer and their competition.

Store B chose to advertise their global presence in their store interior, through signage implementation. They include the various country names on a wall, indicating where their stores are located internationally. They boldly highlight their brand name and South Africa to indicate their locality. Store B utilizes their global presence to draw in

customers. Data therefore indicates that both stores are seeking for global expansion in different ways.

Differences are substantial in each high LSM stores identity. Store A is perceived by focus group participants as a middle LSM global brand store striving to be a luxury global brand store. They utilise their design intervention to create an illusion of grandeur and sophistication. Their minimalist approach to design, detailing and spaciousness offers a feeling of luxury. There is a strong link to high end fashion, catering to a trend-conscious target market. The merchandise is a runway fashion equivalent, sold at a more affordable price, however focus group participants felt that they are not made of designer quality. The quality is perceived to be greater than what it is due to the design of the store. The minimal use of colour emphasises the product, creating a simplistic canvas backdrop for garments to become the showpieces. They invest in design consistency through repetitive use of the same finishes, fixtures, fittings, displays and colour usage. The minimal number of garments on display offers customers merchandise exclusivity. Focus group participants described that the signage was distinctively more exclusive because even if you didn't see the store name, the design of their store façade created a memory embedding identity. The store design and quality thereof are of international standard. Data therefore indicates that spatial quality, interior design, detailing, quality, colour, finishes, fixtures, fittings, and merchandise exclusivity has all influenced Store A's store identity.

Store C does not rely on marketing strategies. Their store reputation was unknown to focus group participants, yet they praised the stores efforts in the ability to use the store design to portray a strong identity and presence. The interior space, layout and design speak clearly and effectively, presenting an African heritage. There is brand consistency, in repetitive use of their unique logo. Their merchandise is uniquely designed and detailed to suit their store identity. Their location offers exclusivity, as they are the only store in Cape Town. The overall impression given to all participants is upmarket, high quality whilst honouring an African identity.

Participants noted that it is definitely the store design that creates a perception of the store's identity. The quality of the garment played an important role as well, in tandem with the design of the store to create perceived luxury and not the income bracket or price of a garment. Data indicates that each high LSM stores tangible and intangible design and the quality thereof influenced their store identity.

5.4.2 Brand identity

There were similarities and differences noted in brand identity in the middle LSM stores. They are similar in offering a wide variety of merchandise, housing a number of brands in one store, selling affordable and fashionable products, catering for a young target market and utilising graphics and signage to communicate their brand.

They varied in design quality, merchandise quality, consistency and variety of finishes, fittings and fixtures. Store B portrayed a strong concept & brand, described by all participants as human centred, homely, relaxed and exposed with a welcoming atmosphere.

Store D portrayed a brand to all participants that placed more emphasis on price, where the quality of merchandise is not guaranteed. The physical environment is not as fashionable as the product. They have however; showed brand progression in the rebranding of their store name and store placement in an upmarket tourist mall. The concept is to look good while not having to spend a fortune, this is carried through in their store design and merchandise style. Data therefore indicates that middle LSM stores do not solely rely on store design to portray their brand lifestyle.

Both high LSM stores cater for a wide age group, however there are clear distinctions in the communication of brand identity in both high LSM stores. Store A utilises their minimalist store design approach to place more emphasis on their merchandise to portray their brand. There is a consistency and simplicity in store design, structured layout, minimal colour usage, luxury spatial quality and merchandise exclusivity.

Store C relies on their store's aesthetic appearance, store atmosphere and repetition of their logo to emphasise their brand. There is a consistency in the quality of their detailing, textures, finishes, distinct aroma, visual appeal and dark colour usage, which portrays sophistication and luxury according to all participants. Data therefore indicates that high LSM stores rely on the quality & consistency of intangible and tangible design elements to portray their brand lifestyle.

5.5 Merchandise

5.5.1 Merchandise Style in relation to Store Identity

According to all participants, both middle and high LSM stores portrayed a link between their store identity and merchandise style. Store B utilised their store design to

communicate a store identity of easy living and homeliness according to focus group participants. This was depicted in the way they designed each section differently to suit the various apparel brands, in a similar manner in which each room is differentiated in a home.

Store B's apparel has the original branding of international bands, sports teams, Disney characters and promotes international holidays. The merchandise design style is not specific to their country of origin but it does promote their global presence. Focus group participants highlighted that their material quality and fashion quality portrayed an international standard.

Their commercial fashion appeals to each gender. Their store design is addressed in a similar manner to communicate each merchandise section, through variation in colour, fixtures and visual merchandising displays. There are merchandise lifestyle cues to appeal to their young target market.

Store D's merchandise is displayed in interesting and fun ways to appeal to their young & sociable target market. Store D promotes emerging South African designers and artists in store, by collaborating with them to produce South African apparel. They also developed a series a of pop up stores in which they sold these special edition South African apparel ranges.

They imitated prints, words or colours of the special edition apparel and translated it directly into the pop-up stores design. It was used to create exclusivity around that specific clothing range. Their main store outlets are not designed in the same manner. Data indicates that Store D is fashion focused and not design focused. The affordability of their fashionable apparel is portrayed in the cost-effective nature of their store design approach.

Store A and C varied in merchandise style. Each store created a unique store identity to suit their merchandise style. Both stores provide exclusivity in displaying a limited amount per style of garment in store. They both have branded fragrances which are displayed in store, and influences the stores aroma.

Store A draws style and inspiration from runway fashion. They group their merchandise styles to create wardrobe style solutions on display to entice customers. The merchandising units are minimalist and sleek in design, matching their clothing

designed for young and older professionals. It provides an idea of exclusivity at an affordable price tying in with the simplistic style of the store identity.

According to all participants, there is a distinct balance in style and design in Store C. Store C's merchandise style does not portray the same luxury as the store interior, but the detailing and quality thereof matches their store identity. There is continuity in the presence of their logo and brand name utilised in store and printed on their apparel. The consistency in merchandise colour matches the tones used in their store design. Store C provided exclusivity in location, being the only store in the Western Cape as opposed to the other stores visited. The high LSM stores merchandise style was influenced by consistency in design and exclusivity in availability.

5.5.2   Quality

The store design influenced the perceived view of store quality. The store quality influenced the perceived view of the merchandise quality. The merchandise quality influenced the dependability thereof. Consistency in store quality and merchandise quality impacts the store identity.

5.5.2.1 STORE QUALITY

The store quality differed for both middle LSM stores. It was observed that the quality and variety in fixtures, fittings and finishes influenced the perceived view of store quality. Focus group participants identified that the design quality of Store D portrayed efforts to save the customer money, as a low monetary investment was noticed in the quality and variety of fittings, fixtures and finishes. All participants perceived that the store quality emphasised price, rather than design in order to maintain a low overhead structure.

Store A and C portrayed a quality store through their design approach. The consistency and quality of the finishes, fixtures and fittings utilised in both high LSM stores promoted their store quality. Data therefore indicates that store quality has influenced store identity.

5.5.2.2 QUALITY OF MERCHANDISE

All participants identified that the design of the store influenced the perceived quality of the garments as Store D incorporated noticeably lower quality finishes, fixtures and

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fittings in their store design which leads participants to view a lower quality garment. The quality of their mass-produced clothing matches the mass-produced quality of the modular display units. Store D is viewed to be all about affordable price rather than quality.

The quality of the product is promoted in Store B as they use the merchandise as part of their visual merchandising displays. The visual impact of their store design influenced the perceived quality of the garments. The merchandise quality matched the store design quality of Store B. The data therefore indicates that the quality of store design can influence the perceived view of merchandise quality.

According to focus group participants, the exclusivity of Store A's merchandise attracts customers rather than the quality of the merchandise. The identity of Store A is fitting of the lifestyle of the customer rather than the quality of the clothing. They described that the minimalistic approach to Store A's store design creates a strong sense of luxury and therefore strengthens their brand and perception of the merchandise quality.

Store A and C differed in merchandise quality. Store A's store design and merchandise exclusivity promoted the merchandise quality. All participants agreed that Store C produces good quality merchandise, noted in their fabrics and detailing which further motivated the successful design of their store. Data therefore indicates that there is consistency in quality of garments and store design in the high LSM stores, thus influencing their store identity.

5.5.2.3 DEPENDABLE MERCHANDISE

Both stores offer no merchandise exclusivity, there is constant availability of their mass-produced merchandise. Merchandise is dependable as customers can obtain the same items at other store branches. All participants agreed that the dependability differed between the middle LSM stores merchandise based on quality. Store B's merchandise offers dependable quality, whereas Store D's merchandise was seen as unreliable due to the lesser quality. The low quality made it apparent that the garments would not last for a long duration of time, therefore making it less reliable.

Both high LSM stores offer merchandise dependability. All participants identified that exclusivity increased the high LSM stores merchandise dependability. Store A and C offers merchandise exclusivity by limiting the number of garments displayed, eliminating the chance of many customers purchasing the same garment. Store C's

merchandise is exclusive in that all their garments are branded with their store name or logo. Their location also plays a vital role in creating exclusivity of the brand, being the only store in the Western Cape. Store A locates themselves in a high-end tourist mall, suitable for their target market. Data therefore indicates that high LSM stores merchandise dependability has been influenced by exclusivity of their merchandise and store location. Their merchandise dependability impacts their store identity.

5.6   Promotion

5.6.1   Advertising

Very clear distinctions were observed in advertising between high LSM and middle LSM stores. In the middle LSM stores, advertising techniques are similar. There is a clear use of signage, each uniquely designed to suit the specific ranges in both stores. Both stores brought in humour and playfulness through their signage and rely heavily on their lifestyle decals to educate the shopper. Notably from all the signage, advertising boards and graphics utilized and incorporated within the store it is clear that in-store advertising is very prominent and important to the company's marketing strategies. Focus group participants enjoyed having the information more visible. It allowed them to feel more knowledgeable about the product.

5.6.1.1 IN-STORE SIGNAGE

Store B and D utilises signage as non-verbal communication tool to connect with their customers. Both stores advertising boards and signage provides information about the price, type and style of the apparel in order to educate the customer. Focus group participants enjoyed the playful nature of the advertising brought in by the middle LSM stores and expressed that they connect well with their customers through the use of fun signage and quotes.

Store D gave a sense of belonging through their signage implementations in store. They utilised jargon in short phrases familiar to focus group participants, identified as uniquely South African. Store B utilised signage to portray their positioning within South Africa as well as their global presence in other countries to emphasise that they are a global brand store; by adding a sequence of countries names on the wall, which included South Africa.

No signage information is provided about the apparel in the high LSM stores. All participants agreed that the high LSM stores intentionally designed stores to include

minimal signage. Customers are not informed by signage as staff assistance is prominent in Store C. There is a clear branding presence through repetition of the stores brand logo and name throughout Store C. There is a definite simplistic and minimalistic approach to advertising in the Store A, as participants are hardly exposed to any advertising. Store A only includes necessary in-store signage, its main purpose for direction and safety.

5.6.1.2 GRAPHICS

Both middle LSM stores utilise in-store graphics to reinforce their target market. Data indicates that lifestyle decals are more prominent in middle LSM stores than in high LSM stores to represent their target market.

There is a minimal use of graphics in both high LSM stores. In Store A there is a minimalist approach to graphic use, similar to their minimalist store design approach. Graphics are only incorporated behind each point of sales in Store A. The only graphics incorporated in Store C were large black and white framed graphics used to portray a certain lifestyle of the brand.

5.6.2 Displays

Each store utilised their custom designed visual merchandising displays to create different store experiences and emphasise their unique store identities. Data therefore indicates that all the stores utilised their merchandise displays to create different selling experiences. The middle LSM stores display an abundance of merchandise whereas the high LSM stores offers merchandise exclusivity

Regarding visual merchandising, differences were noted in their variety, quality, finishes, fittings, mannequin design and display within the middle LSM stores. Store B offers a variety of visual merchandising displays; differentiated by their variety of finishes. They utilise different levels for displays and mannequins, providing visual appeal from various angles. There is clear viewing distance between the apparel and the shopper.

Store D repeats the same types of displays throughout with only signage to indicate differences in product range. According to participants, they are very enticing from the entrance, however the same enticement is not created throughout the store. The quality varied due to utilisation of standardised fittings and low-quality finishes. There is a

playfulness in approach to how merchandise is displayed on their mannequins. There is no clear viewing distance between the apparel and the shopper, as the store is overloaded with apparel.

There are clear distinctions in the high LSM stores visual merchandising displays. Store A and C's visual merchandising displays are custom designed to suit their store identity. They differ in design, colour, mannequin design, props, and curation of garments on display.

Store A's visual merchandising displays offers flexibility due to the design of the display mechanisms utilised. They provide good balance in arrangement of their displays. The same types of minimalist and simplistically designed displays are repeated throughout their store, portraying consistency. There are no props on display and only full height mannequins are utilised. Garments are mostly forward hanging, and style solutions are formulated within each display area.

Store C's visual merchandising displays are dark and detailed, no full height mannequins are utilised, there are props on display. Each display is carefully curated to portray a lifestyle. Garments are mostly folded or side hanging, proving a different store experience in engagement with the merchandise.

5.7   Service

5.7.1 Payment options and services

Locally, in store technological payment options and services have not been fully developed. Store D is the only store that introduced a fairly new payment method. This is a basic digital pad system which gives a safer security measure for your pin code as it shuffles numbers on the screen to ensure that you press a different key each time, as to the standard keypad.

Store A, B and D have horizontal integrated touch screens recessed in the point of sale counter. The customer can look directly onto it and watch how each item is scanned into the system before payment is made. The only store that has a more conservative sales point is Store C. This is ironic as portray themselves as a luxury brand store. They have shown great care and investment into the development of their store image. No new methods of payment or services were observed at Store C or A.

According to focus group participants, the global retail market has integrated technological advancements in their stores, which greatly appealed to them. These were found to be lacking in the South African stores.

5.7.2 In-store Technology

Store D and Store A are more technologically advanced, integrating technology in different ways. Data indicates that Store D is aiming to be successful in a global market, by trying to remain up to date in store technologies. As a result, it reveals that technology has helped produce and distribute knowledge to customers in Store A and D, and suggests that consumers and retailers can benefit from what technology can provide.

Store B has digital screens on either side of the stores entrance way and LCD screens in the "Body" section playing a video. Store D has a digital screen by their fitting rooms, projector screens installed in the ceiling projecting imagery onto the walls above eye level and interactive digital pads installed in store for customers to use, to be more informed about the merchandise.

Store D no longer print out slips, they email it to you to save paper. In order to do this, personal information such as your email address is required, used to gain information from the customer and capture purchasing data. Subsequently, this results in sending customers promotional advertising in digital format. Store D's point of sales system was more advanced than Store B, the recessed flat screen integrated in the point of sales could be flipped over so that a customer could also sign or type something onto the screen.

Findings indicate that technology is prevalent in Store A's IT systems integrated at their point of sales which also flows through their supply chain, used to gain information from customers. The use of technology in Store A ensures a quick information flow within the company. It is used to find out more about new market trends. It ensures that they have a successful supply chain. It provides feedback to design teams and reports customer trends in order to create better value for their customers. Store C has made no efforts to add any technological advances inside their store. It is the least technologically advanced store out of all four stores.

Store D proved to be more technologically advanced than Store B. Store D attempts to fuse the physical and digital world to create a different customer experience. Integrating

new technological advances ensures that customers are engaged in different ways. It adds visual stimulation and physical interaction.

5.8   Globalisation

From the findings presented, it is evident that design inspiration has been derived from international standards and trends. The store image themes discussed, contribute to the following section which responds to this studies' main research question:

"How has globalisation influenced store image in South African apparel retail design?"

5.8.1   Social & Cultural Influences

The subtlety in design changes in Store D are not easily noticed as they are so embedded in our social culture. The local language utilised in Store D's signage is rooted in a local social culture capturing a South African market. Shortening the brand name to an abbreviated form socially engages with their young target market.

Store B utilised signage to indicate their positioning in a local and international market, however no social or cultural South African influences were represented. By listing their locations in leading global cities, it indicates their market share in an international and local apparel retail sector, strengthening their global presence.

Store C locates itself internationally in Dubai, however; locally in South Africa there is only one store in each province. The exclusivity in location in South Africa, and placement within a wealthy business capital such as Dubai, aids their store identity of African Luxury.

Focus group participants were impressed by what Store C's store design could achieve, it appealed to their senses and they enjoyed the store experience created. Despite this, their store image was still viewed as Eurocentric, described as British and colonial. It is viewed that Africa is not associated with luxury, which indicated to focus group participants that global views are still embraced. They emphasised the importance for South African brands to portray who they are, in order to ensure that cultural heritage does not become entirely lost.

Keeping this in mind, Participant 4 identified that: "*South African culture is not clean cut"*. South African culture is an umbrella term under which many different nuances are

derived from due to the many cultures situated in one country. Local branded stores only utilised subtle nuances to hint at a South African identity, to deviate from the common design language in order to individualise their identity. However, according to all participants this is not enough to steer away from the norms of global views. In South Africa our already distinctive cultures are not being portrayed to their full capacity in stores but rather adjusting to the "global norm".

The findings indicate that in the apparel retail sector, South African culture has been lost in an attempt to formulate an international identity. However, attempts to preserve the idea of a distinct culture can also be noticed in simple integrations. One would need to be a South African or have been exposed to South African culture to recognise the subtle nuances. The South African culture is therefore not a dominant culture within local retail stores, but neither is it considered in its entirety in global retail stores.

5.8.2 Visual & Social Identity

Similarities between the middle LSM stores were prevalent in design, specifically in advertising strategies. There becomes a reliance on visual identity, embedding bold graphics and signage in order to promote a lifestyle rather than integrate design. Merchandise and information become the focal point so that customers can feel more knowledgeable about the product. The middle LSM stores communicates their lifestyle to feed their young target markets social identity.

It becomes evident that monetary investment in store image, greatly influences the perceived view of the store quality. Store D emphasised throughout their store design quality that their focus lies solely on the price point. Store D spends less on design so that their store and brand are seen to be affordable and accessible.

5.8.3 Environmental

Data indicates that environmental climates largely influence design. This was particularly evident in Store D's design approach. They chose to blend themselves into their stores positioning and adjust themselves according to neighbouring stores in order to gain competitive advantages. The environmental integration occurred due to locality in an upmarket mall which influenced their product offering & brand name. They positioned their global store in Australia, where one of their main competitors are located.

Store A has not changed their store to suit a South African location. They implement the same approach to store design in all global locations. Participants identified that Store A specifically places themselves in mall locations in South Africa which are suited to their target market in order to maintain a high profit margin. The exclusivity of location in the high LSM stores promotes their global presence.

Cultural difference occurs based on boundaries set. In the selected stores, changes in design have occurred based on environmental boundaries. It is clear in Store A that particular boundaries are set to maintain a specific identity, whereas in local stores the boundaries are not as clear. The findings resonate with literature that indicate that changes often occur due to physical, social and economical environmental changes.

5.8.4 Fashion industry, shopping & consumer culture

Fashion designers are constantly influenced by global events which dictate design through supply and demand. Resulting in apparel retail stores being closely connected to the strong globally influenced fashion industry. When analysing the merchandise style versus each store's identity, Store B and A, international brand stores; clearly indicated a global approach to merchandise style and store identity. Store D and C, local branded stores portrayed a local approach to merchandise style. However, there is a disconnect between the merchandise and the store identity. Store D is still a global fashion conscience store, as they appeal to a trendy and young target market. Therefore, fashion focused and not design focused. The mass-produced merchandise also influenced the store quality and dependability of the merchandise offered.

Shopping is a social activity you can do with friends or family. People yearn for a community to find an identity as an individual identity is hard to maintain in the ever changing globalised world. Shopping in an environment that is unique, unites a certain type of person to create a community identity. In this case, the high income stores provided a higher degree of individual identity, albeit not a specifically South African one but something one can depend on to provide exclusivity. This presents a continuity in identity which individuals can cling to and say they belong.

5.8.5 Technology

The presence of technology in Store D and A helped to produce and distribute knowledge of the products. Technology provided a tool of engagement within the store environment for consumers in Store D. Whilst engaging with these technological

advances, retailers were able to gain information through various technological devices, integrated in their retail environments, specifically through digital tablets or IT systems at the point of sales. There were however, limitations to technological integration and development within these four stores. Predominately; Store C portrayed the least technological development, despite their large investment in store design. Store D deemed it of greater importance to focus resources on technological advances in-store rather than invest in store design. Store D utilises technology to appeal to their technologically advanced, fashion conscience, young target market in order to gain a competitive advantage.

There isn't sufficient data to motivate the integration of omnichannel in South African retail apparel stores, but it is enough to mention that the focus group participants did enjoy the digital integrations within the stores observed and they also enjoyed the sensory experience it provided. Omnichannel should therefore be considered a factor in satisfying the needs of the consumer. Stores could benefit by including a more integrated design and digital approach, optimising the way we shop through various technologically based and physically design based channels. In future it is expected that a local identity may be even harder to maintain in a digitally mediated globalised context, even if you have not travelled to another country, you would be exposed via digital media therefore store design will be increasingly impacted by globalisation.

Overall, data indicates that globalisation has influenced store image in South African apparel retail design within middle LSM stores, particularly through social identity, culture, location, economics, the fashion industry and technology. Middle LSM stores portrayed many similarities in store design however, not in store quality. Due to their similar target markets, they have opted to look similar to their competitors. In contrast, high LSM stores portrayed the least similarities between each another. Each portraying their own unique identity afforded by greater store design investment.

This resonates with the literature as there are increased interactions between local and global stores due to globalisation. Subsequently, the movement of people has become an essential aspect of globalisation as travel and tourism allows people to engage with various cultures and identities; enabling increased connectedness among different people and cultures. These interactions can result in a shift in local and global views, as different parts of the world become increasingly interrelated.

Social and cultural influences are derived from the entire retail market and not just a South African retail market. Thus, the retail economy is driven by global views and not

local views. Social interaction occurs more easily and frequently, between different localities worldwide due to technological advancements, that cultures are starting to merge and no longer belong or remain unique to an individual place. As a result, a common design language continues to develop in middle LSM stores rather than choosing to depict an individual identity.

Globalisation provides multiple variables that require retailers' swift responses, however this is not always feasible. This was evident within the middle LSM stores, as their response to global change impacted their store identity; depending rather on consistency with one another, than difference, to remain competitive. This resonates with Findlay and Sparks (2002) as the middle LSM stores portrays a store image that appeals to their customers from a practical, functional and economical perspective. Only the high LSM stores are distinct in portraying a certain store identity to appeal to a customer's identity as the customer seeks a reflecting status or portrayed lifestyle.

Contrary to the literature of Hibbert (n.d), there is a specific attempt to respond to an individual cultural and social identity within the high LSM stores. Design was clearly communicated and different consumer experiences were created, in both high LSM stores, to engage with the space and the merchandise in a unique manner. The high LSM stores respond to change whilst still blending in with the local customs. They each portray a unique identity and are not influenced by global similarity.

It became prevalent that location is important in understanding the customer and competition. A place has its own identity in which it portrays a certain cultural, social and economic identity. The high LSM stores specifically chose optimal locations to suit and aid their own store identity. The middle LSM stores positioned themselves in similar locations to compete and maintain a similar customer base. Ultimately ensuring that their cultural, social and economic identity remained similar.

Store D and A have benefited from globalisation through technology; it has aided both stores by integrating retail tools that provide insight into consumer purchases. Globalisation has also provided Store D an opportunity to expand internationally and so gained international presence through production and distribution of knowledge.

5.9   Recommendations for further study

It is apparent that retail design is multidisciplinary in nature. This particular research is solely focused on experiences from Interior Designer's perspectives gathered from a

focus group discussion and store observations. However, there are other key role players such as visual merchandisers, retail lighting specialists and store design managers that could provide further insight into South African apparel retail design.

It is evident that investment in design is important in creating store image. Stores that consider design as a differentiation strategy are able to provide an individual and unique store identity, this may however not be economically viable for middle LSM stores. Further research is required to determine how to sustain economic growth in order to promote investment in design capabilities.

Due to the depletion of natural resources, greater awareness needs to be created regarding environmentally conscious solutions towards store design and the expectations of shopping malls to refurbish stores on a regular basis. This could be of benefit to stores who would like to implement changes to their store image in an affordable and sustainable manner.

Data indicates that there is an increasing role for technology in apparel retail design. Locally, it is evident that there is still scope for in-store technological advancements. The technological facilities integrated are intended to boost retail change. It is prevalent in today's social culture; however, it is expensive and can be seen as a luxury within an economically strained and highly competitive retail market. Technology is used as a communicative tool to produce and distribute information. However, design advancements developed through technology could promote change in design and store identity within a retail store environment. Technology can be further investigated, in order to provide more engaging and curated store experiences.

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