

Unit 9: Understanding Visual Merchandising for Retail Business

Unit code: A/600/0656

QCF Level 2: BTEC Specialist

Credit value: 4

Guided learning hours: 39

Unit aim

This unit provides the learner with the knowledge and understanding of the principles of visual merchandising. It covers the principles of display design and installation. The unit also focuses on the importance of visual merchandising in relation to brand identity.

Unit introduction

The purpose of this unit is to develop the knowledge and understanding of visual merchandising for retail business.

Retailers compete intensely to get customers into their stores. They are all chasing market share. Visual merchandising is one of the ways retailers aim to increase sales by enticing customers through the doors. Successful retailers understand how visual merchandising works and how to make it work for them.

This unit will give learners understanding of the importance of using window displays to ensure customers recognise the retailer's brand image. Learners will be introduced to the ideas of presenting visual messages through display.

The unit will consider how different seasons and themes are used through window and in-store displays to promote sales. Learners will be introduced to the use of display props to support the brand identity of retailers.

Retailers use the principles of colour theory and design to plan and install window displays. This unit will help learners consider how to make best use of space. There will be opportunities for selecting and installing a variety of fixtures and fittings to support display designs. Selection of the correct tools and equipment is important for health and safety as well as easing the way a job is carried out.

Floor layouts will be explored to understand how and why these are changed to maximise sales. Learners will be able to consider what is meant by 'product adjacencies' and the impact these can have on sales. The unit will introduce the concepts of displaying products in different locations to bring benefits to the retailers and the customers.

The very nature of visual merchandising requires the best possible presentation of products. The importance of cleaning and polishing products before display will be examined. The reasons for careful handling of products will be explored.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

| Learning outcomes | Assessment criteria |
|---|--|
| 1 Understand the importance window displays have in translating the retailer's identity to the customer | 1.1 describe how to translate brand image to the customer through window displays 1.2 describe the different types of visual messages that retailers can showcase through window displays |
| 2 Understand how events and props are used to promote merchandise in a retail environment | 2.1 describe how different seasonal and calendar events are applied through window and/or in-store displays in order to support brand identity 2.2 explain how different props can be used in window and/or in-store displays to support brand identity |
| 3 Understand how to plan and install window and store displays | 3.1 identify the basic principles of colour theory 3.2 identify basic design principles and elements used in retail displays 3.3 describe the methods used to produce and record simple design plans 3.4 describe how to make best use of the space allocated 3.5 describe basic principles for preparing fixtures and fittings and installing props safely 3.6 identify the tools and equipment required to install a themed display |
| 4 Understand how floor layouts and product adjacencies maximise sales | 4.1 describe why it is important to change a floor layout in order to maximise sales 4.2 describe what is meant by 'product adjacencies' 4.3 describe the benefits of displaying specific products in different locations |
| 5 Understand the importance of product preparation and handling in visual merchandising | 5.1 explain why products may need cleaning and polishing before being displayed 5.2 describe why it is important to handle products carefully |

Unit content

1 Understand the importance window displays have in translating the retailer's identity to the customer

Translating brand image

image; colour; display signs; style of mannequins; events; labelling; layout; logos; perception of quality; shopping environment; buying atmosphere; price; name; lighting; location; architecture

Visual messages

themes; value for money; quality; events; promotions; seasonal; environmental atmosphere; regional or local; beauty; classification; price; style; utility; size; loss leaders; decorative elements

2 Understand how events and props are used to promote merchandise in a retail environment

Seasonal and calendar events

thematic displays; seasons (winter, autumn, spring, summer); events (Easter, Christmas, Divali, Halloween); tie-in promotions; display highlights (special promotions); focused display areas; clear messages; relationships between theme, fashion, decor and event; seasonal props and trim; target markets; company image; colour coordination; formula displays

Display props

complementary and enhancing; secondary to merchandise; rent; buy or build to suit plan and budget; selecting props; set style – art objects; pedestals; backdrops; textiles; antiques; seasonal highlights – artificial grass or snow; flowers; add detail – cane and bamboo; ribbons; braids and bows; paper and cardboard; reinforce messages – banners; decorative screens and panels; highlight themes – baskets and pots; barrels and boxes; floor coverings; company image; colour coordination; formula displays

3 Understand how to plan and install window and store displays

Colour theory basic principles

trends; colour wheel; primary; secondary; tertiary; dominant; accent; complementary; matching; rainbow system; colour families; palette; display composition

Design principles and elements

'Golden mean' (3×5 dimensions); balance; beauty; needs; optical centre; white space; location; fixtures; floor density; depth; breadth; placement; volume; company culture and values

Design plans

drafting; sketching; colour; planning; textural composites; design composition; pattern planning; balance; purpose

Space allocation

scaled floor plans; sales targets; fixtures by size; capacity and quantity; classifications of products; units of merchandise; traffic patterns; featured merchandise; focal point; accessibility; health and safety issues

Fixtures and fittings preparation and installation

presentation; complementary to merchandise; scaled floor plans; types of fixtures; rounder; tri rounder; T-stand; straight; waterfall; showcase; slat wall; cubes; tables; parallel hanging rods; merchandise counts; assembly; display loading; traffic patterns; safe assembly; clear working area; set up framework; secure all nuts; bolts and screws; test for strength; hang visible 'flags' on all arms and rods; fill with merchandise; dismantling and storage

Tools and equipment for themed display

thematic design plan; merchandise; display props; art objects; artificial grass or snow; flowers; cane and bamboo; ribbons; braids and bows; banners; baskets and pots; barrels and boxes; decorative screens and panels; floor coverings; paper and cardboard; pedestals; textiles; antiques; wallpapers; block foam; fibre board; plywood; glass; paint; well-equipped tool box; pins; staple gun; glue gun; invisible nylon wire; screwdrivers; utility knife; scissors; tape measure; picture-hanging wire; fine sandpaper; erasers; masking tape; duct tape; double-sided tape; steam iron; clothes brushes; portable vacuum cleaner; cleaning materials; extension cords

4 Understand how floor layouts and product adjacencies maximise sales

Changing floor layout to maximise sales

create order; sales environments to change 'mood'; traffic patterns; presentation of new stock; product life cycle; fixture maintenance; fashions and trends; consumer interests; customer familiarity and shopping habits; seasons and calendar events; increase customer traffic and footfall

Product adjacencies

product categories; complementary product sets; arranged into themes; closer proximity; logical presentation; cross merchandising; encourage impulse buying; highlights loss leaders; product promotion; increasing sales

Benefits of specific products in different locations

meets customer needs; maximises sales; customer familiarity and shopping habits; traffic patterns; merchandise groups; represent sales volume; ethical and cultural considerations of target customers and how floor layout can encourage a diverse range of customers

5 Understand the importance of product preparation and handling in visual merchandising

Cleaning and polishing products

create good first impressions; create the right image; presentation of products; enhance the visual look of products; increase customer satisfaction; increase sales

Careful handling of products

maintain sales value; avoid damage; reduce loss through shrinkage; improve efficiency; presentation of products

Essential guidance for tutors

Delivery

This unit should be delivered so that it gives learners with an understanding of how important visual merchandising is to the brand identity of retailers. Learners should be given opportunities to develop creative skills in visual merchandising. This will encourage a greater level of knowledge and understanding of how the principles of display and design apply to visual merchandising and brand identity. This unit will be enhanced by visits to a variety of retail premises and guest speakers.

Learning outcome 1: learners need to understand the importance of window displays in ensuring customers recognise the retailer's brand. Use of visual aids from television adverts, magazines and publications could support recognition of the visual themes and messages retailers send out. Permission from retail organisations should be obtained if their photographs are to be used but these do offer exciting opportunities for learner-centred work.

Learning outcome 2: the use of events and props in promoting merchandise gives great scope for interactive and practical application of learning. Learners should be encouraged to work in small teams to identify and create thematic displays in a realistic environment. They should be offered opportunities to use display props at retail events.

Learning outcome 3: learners should become well versed in the principles of colour theory. They should be given opportunities to use different design and colour principles in a variety of display scenarios. Learners will be expected to carry out design plans and allocate space and presentation elements in realistic settings. They will need to be able to select and assemble the correct fixtures and fittings and install the final design using the correct tools for the job.

Learning outcome 4: learners' should demonstrate how the floor layout will maximise sales. Learners will need to know about product adjacencies and what they aim to achieve. Learners' designs should also highlight the benefits of placing products in specific locations.

Learning outcome 5: during the creation of any display learners will be expected to understand the need for product preparation and handling. They will be expected to prepare, clean and polish products to create the right impressions. Learners should be held responsible for the careful handling of products and merchandise when setting up displays.

Assessment

This unit may be assessed either by a multiple choice question paper or portfolio of evidence. Further information on the MCQs can be found in *Annexe F* at the back of this specification.

Assessment guidance for learners providing evidence through a portfolio

Learning outcome 1: can be covered through learners visiting a local high street or shopping centre to identify two retailers. Learners should observe and note the window displays to determine what image each retailer is trying to create. The observations should aim to identify the target markets each retailer is trying to reach. A brief article for a retail magazine that explains the learner's opinion of the image and appearance of each store could be written, along with a description of how the brand image has been communicated to customers through window display. Use could also be made of visual aids to enhance the article, thus showing the different types of visual messages that retailers use.

Learning outcome 2: can be covered by the creation of a display for a themed event using relevant display props and trim that give a clear message. The display could be captured in a photographic montage or video diary depending on resources available. Learners should explain the different props that were used to support the brand identity.

Learning outcome 3: can take the form of a design and installation of a window or in-store display that uses some of the principles of design and colour theory. Learners could set out the design in a series of sketches that demonstrates composition. A scaled floor plan of the final design could be produced showing how space was used effectively. The display could be set up using the correct fixtures and fittings and the correct tools for the job. Learners must ensure the display is assembled following health and safety guidelines.

Learning outcome 4: can be covered through a learner visit to a retail store in the local area. Learners could review the layout of the store and make notes to help create a floor plan that recommends some changes in layout. The plan does not need to be detailed. Learners could make notes on the plan that indicate what should be changed and why. There should be a text box on the plan that briefly outlines the benefits of moving the products into these locations. For assessment purposes, learners must also submit a description of product adjacencies and describe the benefits of displaying specific products in particular locations.

Learning outcome 5: can take the form of a guide or poster to illustrate the importance of preparing products for visual merchandising. Learners could also indicate where they have used these principles during their design and display activities.

Indicative reading for learners

Books

Bell J and Ternus K – *Silent Selling: Best Practices and Effective Strategies in Visual Merchandising* (Fairchild Publications, 2003) ISBN 1563672197

Cox R and Brittain P – *Retailing: An Introduction* (Financial Times/Prentice Hall, 2004) ISBN 0273678191

Diamond J and Diamond E – *Contemporary Visual Merchandising* (Prentice Hall, 1998) ISBN 0137417942

Tony Morgan – *Visual Merchandising: Window and In-store Displays for Retail* (Laurence King Publishing Ltd, 2008) ISBN 1856695395

Tucker J – *Retail Desire: Design, Display and the Art of the Visual Merchandiser* (Rotovision 2004) ISBN 288046806X

Underhill P – *Why We Buy: The Science of Shopping* (Texere, 2000) ISBN 158799044X

Magazines and journals

Drapers

Retail Weekly

The Grocer

Websites

www.drapersonline.com

www.retail-week.com

www.skillsmartretail.com/sr/default.aspx