

RETAIL STORE IMAGE: ANALYSIS OF THE IMPLICATIONS FOR STORE POSITIONING

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Abstract:

The present paper analyses the importance of store image and store brands management for the competitiveness of the retail sector. After a brief bibliographic survey on the several definitions concerning store image and its components, strategic considerations about the use of stores brands by retailers are analyzed. The instruments to measure retail store image are also outlined. Next, the impact that store image exerts on store positioning and also on satisfaction and loyalty is studied. Another aspect approached is the influence of store image on the store choice process. Finally, store image and store brands are empirically studied through a case study on a large national retail chain. In this part, the use by this company of instruments to measure store image as a tool to assist decision making related to the long-run marketing programs is verified. The main managerial aspects with regard to the store image were investigated.

Key-words: retail, store image, positioning

INTRODUCTION

Until some years ago, in order to build a store, the only decision to make was to choose the location and display the items on the shelves. However, nowadays, with the market getting more saturated, the consumers usually make their purchase decisions based more on the store image than on its tangible physical attributes. The retail stores have images of their own that serve to influence the perceived quality of products they carry and the decisions of consumers as to where to shop. Consumers also possess self-images, which are strictly associated with their personality. Consumers tend to shop in stores that have images consistent with their own self-images [1].

According to Burt and Carralero-Encinas [2], the retail store can be the key success factor, the competitive advantage of a retail company. The major source of competitive advantage for retailers is found in the value added delivered to customers, through the performance of functions or activities. This value added must be firmly based upon customer needs and values, and may comprise both tangible or functional and intangible or symbolic elements. Therefore, it is fundamental that the stores understand the store image importance in the positioning statement. The success or failure of stores can often be attributed to undertested or underemphasized elements of their image. That is why a number of chains are increasingly stressing customer service and the provision of a pleasant shopping experience, rather than focusing on price promotions.

The image monitoring process is, therefore, a tool that can either dictate immediate actions or direct longer-term marketing programs. For McGoldrick [3], the accumulated image is also an indicator of the asset value of the “retail brand”, which represents the long-term results of the marketing activities.

OBJECTIVES AND METHODOLOGY

The main objective of this study is to understand the impact of store image on store positioning, analyzing the importance of monitoring the retail store image. The dimensions used by consumers to judge the store image and the impact of image on positioning strategies are also highlighted. The methodology employed is the exploratory research, using secondary data analysis and qualitative research. The secondary data research comprehends a bibliographic survey, including previous done research on the topic under study. The qualitative research method employed is the case study

research, in order to make clearer how the image concept is empirically approached by a large national retail chain.

STORE IMAGE DEFINED

For Burt and Carralero-Encinas [2], defining store image is far from easy. The mixture of tangible and intangible dimensions, and the complexity of meanings and relationships attributed to retailers by customers have long been recognized. One of the earliest definitions of store image was offered by Martineau in 1985, in his classical book “The personality of the retail store” [3], which emphasizes the need to consider not only more visible or measurable factors, but also the less tangible factors, such as the “personality” of the store. According to this author, store image is the way in which the store is defined in the shopper’s mind, partly by its functional qualities and partly by an aura of psychological attributes.

This definition, however, was criticized for tending to ascribe a “mystique” to the concept that is not entirely warranted. Other authors suggested that, rather than classifying image as part of the “non-logical basis of shopping behavior”, it would be reasonable to view the customer as rationally evaluating the store on a multi-attribute utility function [3].

Many of the definitions that have emerged could be criticized for implying a stability in store image that is not likely to exist. Images can be changed as a result of relatively minor observations or occurrences which happen to be noticeable and salient to particular shoppers. Berry [4] has largely overcome this limitation, by defining store image in behavioral terms. For this author, an image is the result of differential reinforcement in the context of a given stimulus or set of stimuli. Therefore, store image is the total conceptualized or expected reinforcement that an individual associates with a particular store.

The effect of any specific stimulus would be largely determined by a number of individual “state variables” or conditions of deprivation/satiation, and societal and sub cultural norms. It means that many personal characteristics and expectations of the society within which the individual lives influence perceptions, reactions and therefore the nature of the images formed [3].

McGoldrick [3] observes that while images are usually formed on the basis of limited information, they nonetheless assume a greater proportion and significance than the individual contributory

components. Thus, the images held by consumers are formed, somewhat selectively, from a combination of factual and emotional material.

STORE IMAGE COMPONENTS

Despite having many discussions regarding the most adequate definition of store image, one element of this concept about which writers do not disagree is its complexity, in terms of both the many components involved and the diverse patterns of relationship involved. With regard to the components, many writers have chosen to classify factors in a way that relates to elements of the retail marketing mix. The following table (Table 1) presents a compilation of the store image components classification prepared by the authors of this paper.

The relative importance of the various image components varies considerably between markets, sectors, competitive situations and customer segments [3]. There are sound reasons why the relative importance of attributes should vary between markets, whether the comparison is on an international, regional or even locality scale. First, insofar as different localities are likely to be dominated by different shopper segments, no matter how these are defined, they will inevitably have some different attitudes, needs and priorities. Second, competition varies within each market.

McGoldrick [3] asserts that a generalized view of attribute importance may offer little insight into how consumers may react to a specific competitive situation. If consumers perceive few differences between the stores on the attributes that are usually the most salient, they would probably discriminate between the stores on attributes that would usually be given only low markings.

One component that has attracting increasing importance is the store atmosphere, the physical ambient. Parente [5] defines store atmosphere as the psychological feeling that the retailer develops in the consumer when it visits the store. It could also be understood as the store personality. In order to develop the atmosphere, retailers use resources that influence the sight, smell and other customers' senses. The atmosphere includes lightning, store layout, aisle space, placement and form of displays, colors, presence and volume of in-store music, smells and temperature. This component of store image is of special interest to companies for two fundamental reasons [6]. The first one refers to the marketer's ability to control the situational influences and create the retail environment. The second one regards the location of this influence: inside the store.

Table 1. A classification of store image components

Component	Details
Price of merchandise	Low prices Competitive or non-competitive prices
Quality of merchandise	Good or poor quality of merchandise Stock brand names
Assortment of merchandise	Breadth and depth of assortment Carries or not the brand the customer wants Carries or not elegant brands
Sales personnel	Attitude of sales personnel Knowledgeability of sales personnel Number of sales personnel Good or poor service
Location convenience	Location from home/work Access Good or poor location
Other convenience factors	Parking Hours store is open Convenience with regard to other stores Store lay-out with respect to convenience Convenience in general
Services	Credit Delivery Ease of return Self-service
Sales promotions	Special sales Stamps and other promotions Displays Symbols and colors
Advertising	Style and quality of advertising Media and vehicle used Reliability of advertising
Store atmosphere	Lay-out of store without respect to convenience External and internal décor of store Congestion Prestige of store Congeniality
Institutional	Reputation for fairness Conservative or modern
Clientele	Social class Self-image
Physical aspects	Facilities Architecture Shopping ease
Post-transaction	Satisfaction or dissatisfaction

Source: Adapted by the authors from Kunkel and Berry [21], Lindquist [22], and Doyle and Fenwick [23].

The atmosphere can help shape both the direction and duration of consumers' attention, thereby enhancing the odds of purchasing for products that otherwise might go unnoticed. Besides, the retail environment can express various aspects about the store to consumers, such as its intended audience and positioning. Finally, the store setting can also elicit particular emotional reactions, such as

pleasure and arousal, from consumers. These feelings can influence the amount of time and money consumers spend while shopping. The store atmosphere is, therefore, part of the store image, and not a synonym, since the store image is a broader concept, formed by not only the atmosphere, but also by other elements of the retail marketing mix that determine the store positioning.

According to Porter and Claycomb [7], one tactic for ensuring a favorable retail store image is a merchandise mix composed of a relatively high number of brands possessing high brand awareness, and one or more brands with a strong brand image. For the authors, brand image and retail image are inextricably linked to one another, since favorable images of brands positively influence patronage decisions and purchase behaviors, while unfavorable images adversely influence such decisions and behaviors. It means that the images associated with the brands a store carries influence a store image, which in turn, influences consumers' decision-making processes and behaviors.

Another store image component that have nowadays received considerable attention from retailers is the assortment of merchandise. One assortment differentiation strategy that is been increasingly used is the inclusion of private label products in the set of merchandise offered to consumers [8]. Private labels can help build the store image, because they allow a retailer to differentiate itself from close competitors and to drive store traffic. Since private labels are available in one only specific store chain, they can be unique in terms of value and performance, and this exclusivity can be considered a form to obtain customer loyalty [6].

According to Fitzell [10], there are four major routes to establish that brand authority in the private label world. The first one is the generic brand, which carries no store or brand identity, makes minimal use of color, utilizes cheaper packaging materials, and works best in the product categories of household cleaners, paper products and condiments. The second one is the rubber stamp brand, which is the most cost-effective strategy, using the identical corporate name, symbol, typestyle and color on all products. The retail brand endorsement is the third route to brand authority, highlighting the retailer's name and identity but with the packaging design, color and graphics varied depending on product categories. Finally, the last one is the proprietary brand, where products take on their own identity with little or no indication of their true ownership in order to project a national brand image to a retailer's product. This branding strategy, in fact, appears to gaining the most momentum in the marketplace today.

As for the positioning strategies, the three basic platform-positioning strategies for private labels are budget, copycat and fantasy [9]. The budget positioning strategy is strongly developed in the discount chains, like the German chain Aldi. As discounters still have high growth potential in Europe, they influence competitive responses from large mid-market multiples. The copycat positioning strategy is hugely successful when integrated into the marketing/image strategy of the retailer. Minor European retailers are now introducing the same kinds of private label programs as major European retailers. Retailer imitation of successful store brand programs is more threatening to national manufacturers because within-store loss of share to the retailer's store brand (or for that matter another national brand) is not likely to be made up with a sale at a different retailer [12]. Moreover, Sayman, Hoch and Raju [11] noted that store brands often imitate the category leader, presumably to signal comparable quality at a lower price. Although the demand for the store brand may increase, the potential downside of this strategy is that the demand for the targeted leading national brand may also decrease.

Finally, the fantasy positioning strategy is becoming much more important for the retailers. This strategy is all about creating innovation, adding value to the private label lines, which motivates consumers to move upmarket, generates greater sales values and higher profit levels, but carries higher risks. In part this added value comes about through improvements made to packaging. Premium store brands offer the retailer an avenue for responding to the national brand's ability to cater to heterogeneous preferences [12]. This appears more likely in categories where store brands already offer high quality comparable to the national brands.

MEASURING STORE IMAGE

Given that image research is more concerned with the measurement of attitudes and opinions, rather than with more easily quantifiable factors, it is appropriate to summarize the main measurement techniques used and the issues that have arisen. A variety of structured and unstructured tools has been used, and the most used ones are explained in the following paragraphs.

The semantic differential is probably the most widely used scaling system in retail image research [3]. The construction of a semantic differential scale involves the selection of dichotomous pairs of words or phrases that could be used to describe the store image concept. Respondents then rate the concept on a scale of, usually, seven points. Compared with traditional scales, this has the particular

advantage of saving space on the questionnaire. The main drawbacks, however, are the difficulties of coding the data for computer analysis and the more complex instructions for respondents.

Another technique is open-ended questions. The open-ended techniques overcome an important drawback of attitude scales; the fact that they involve forced-choice measures that may not isolate critical image components [3]. For McDaniel and Gates [13], one of the advantages of these techniques is that the respondent uses its own frame of reference in its answers, using “real world” terminology that can be used in the development of promotional campaigns.

The multidimensional scaling is an approach that permits some structuring and quantification of images, while avoiding the rigidity of fixed scales. By this approach, perceptual maps can be evolved, indicating the perceived similarities and differences between stores and the most salient dimensions by which these are assessed. The technique has the potential of exposing judgment criteria of which the respondents are not consciously aware or less willing to discuss [3].

Finally, one last set of techniques is the multi-attribute models. The application of these models came into vogue as a result of the inadequacies of the semantic differential scale [14]. The multi-attribute models measure the attitude profile of consumers in relation to an object (in this case, the attributes that compose the store image) as a function of consumers’ perception and assessment of the key attributes or beliefs held with regard to the particular attitude object [1].

STORE IMAGE IMPLICATIONS FOR POSITIONING

However sophisticated or basic the measurement technique, the full value of image monitoring can be realized only through simultaneous comparison and, if possible, comparisons over time. The advantages of also tracking images over a period of time is that a “moving picture” of the store’s positioning is created that can assist in evaluating the effects of strategic moves, marketing activities and competitors’ actions.

For Levy and Weitz [15], positioning is the design and implementation of a retail mix to create an image of the retailer in the mind of the customer in relation to the competitors. Since the positioning emphasizes the image in the customer’s mind (and not the one in the manager’s), researches have to be conducted in order to know what is the retailer’s image and to assure that it is being coherent with what customers desire in this target market.

The image that a store has in the mind of the consumer (that is, its positioning) is probably more important to its ultimate success than are its actual characteristics. The stores try to position themselves in a way to create an image that is consistent with the self-image of the target market segment. The design of the service environment is an important aspect of service positioning strategies and sharply influences consumer impressions and consumer and employee behavior. The physical environment is particularly important in creating a favorable impression for the retail store, because there are few objective criteria by which consumers can judge the quality of the services they receive [1].

STORE IMAGE IMPLICATIONS FOR SATISFACTION AND LOYALTY

Store image is recognized as being another important antecedent of store satisfaction and loyalty [16]. Store loyalty is built by satisfaction and this satisfaction, in its turn, is built by store image [17]. According to Levy and Weitz [15], the store satisfaction is a post-consumption evaluation. The consumer will evaluate whether the store meets his expectations. For the authors, a retailer can build consumers' loyalty with a positive store image.

Bloemer and Schroder [16] considered consumer satisfaction as a pleasurable level of consumption related fulfillment. The authors define store loyalty as the biased behavioral response expressed over time, by some decision making unit, with respect to one store out of a set of stores, which is a function of psychological processes resulting from commitment. These behavioral responses were considered, in the study, to be word-of-mouth communications, purchase intentions and price insensitivity.

Bloemer and Schroder [16] demonstrated that a consumer who perceives a positive image of a particular store is more likely to be satisfied with a store than a consumer who perceives a less positive store image. Therefore, their study concludes that a more positive store image would lead to a higher level of satisfaction. Moreover, a more positive store image would lead to a higher level of positive affect, increased the satisfaction level. By its turn, the satisfaction would lead to store loyalty if the trust and the commitment with the store were present.

STORE IMAGE IMPLICATIONS FOR CHOICE PROCESS

Consumers form images of various stores based on their perceptions of the attributes they consider important and these images affect the choice process [18]. The authors consider the store choice

process as a function of consumer and store characteristics. To make a purchase decision, the consumer searches for information about the store in order to minimize the dissatisfaction risk. According to Mason, Mayer and Ezell [19], this information could be provided from the retailer itself through a sales promotion or advertising. The consumer could even receive recommendations from its neighbor, friends and family about the most appropriated place to go shopping. The retailer, with this information, could explore its retail marketing mix, in order to create the desired store image in the consumer mind.

Engel, Blackwell and Miniard [18], suggested a store choice model that involves the evaluative criteria used by consumers and perceived characteristics of store, that is, the store image in the consumer mind. As mentioned before, consumers in each market segment form images based on their perceptions of the important attributes. These perceptions depend on the following variables: location, assortment breadth and depth, price, advertising and sales promotion, store personnel and services.

In the same way, it is possible to say that the retailer can use many tools to influence consumers' perceptions of store image to have a positive impact on store satisfaction and loyalty. These tools must be used correctly in order to make this positive impact possible in the consumer mind, placing the store as the first purchase option.

CASE STUDY

According to Yin [20], for a case study research, the research design components that are specially important are the study questions, the propositions and the unit of analysis. In relation to the study questions, the case study strategy is most likely to be appropriate for "how" and "why" questions. With regard to this component, the following questions will be investigated in a retail company of Brazil: (1) How does the company deal with the concept of retail image to obtain the target positioning in the market? (2) How does the image affect the satisfaction and loyalty of its clients? (3) How is the image concept structured in the retail company's point of sales? (4) Which measurement instruments are used to evaluate the company image?

The propositions direct attention to something that should be examined within the scope of study. From the moment the propositions are state, the study starts to move in some direction [20]. The following propositions are considered in response to the questions posed before: (1) The company

design its layout to value its main capabilities (2) A good image leads to a higher level of satisfaction and loyalty (3) The company manages the image concept, dealing with all the actions necessary to construct a strong positioning in the consumer's mind (4) The company's private label programs contribute to a positive image for the company.

The unit of analysis is related to the fundamental problem of defining what the case is. The propositions are necessary to help identify the relevant information about the individual or individuals under study. The more a study contains specific propositions, the more it will stay within feasible limits [20]. For this case study, the unit of analysis is a supermarket chain established in 1948. This company is one of the most important retail groups in Brazil. The group manages four different retail formats, selling fresh food and electronic equipments, with 58.000 workers and 500 retail points in 12 different states in Brazil. For this study it was analyzed one business unit, which represents 31% of net sales of the group in 2003.

In the following part, each proposition will be investigated in the company. The first proposition suggests that the company design a specific layout in order to enrich the main aspects of its product assortment and, by this reason, it can reach the desired positioning. According to the local manager, the stated positioning of the company is: to be a neighborhood supermarket, with strong differentiation attributes, such as a good quality of fresh fruit and vegetables at competitive prices, allied to an excellent service level. One way to reach this target positioning is by the management of the store image at the point of sales. The chain's retail stores are generally medium, located at different regions in a city, near its clients and with the characteristics of the region where they are located.

Another way to obtain a competitive advantage is to position the stores as a supermarket strong in perishable goods. These products are sold daily and generate a continuous client flow. Layout plays an important role; perishable products are exposed in a circular way surrounding the central shelves. In order to differentiate the offerings, fruits and vegetables are exposed at the entrance of the store. This position attracts the customer's attention to the quality offered and gives a positive sensation. Clients continue to shop around the store, visiting other sessions posted near the lateral circle.

The second proposition declares that a positive image creates superior satisfaction and loyalty levels. The main factors that contribute to create a positive image in the studied case were: depth

assortment, variety of products, quality of perishable products and a good climate generate by friendly workers.

The third proposition considers that the enterprise uses the image concept in a structured way, working with all the store image components in an organized manner. The interview and the visits to units of the analyzed supermarket did not reveal a structured treatment to the retail image concept in the organization. The main changes in the atmosphere and layout of the stores were based on local managers' experience. In depth research with clients were not used. Actually, what in fact exists is a generic model that uses some prescriptions made by the central bureau of the group, but adaptations to the local public are basically made through the pragmatic vision of local managers. The evaluation of these local changes made by the managers is measured by observing the impact caused in the gross sales. If after a new place arrangement there is a positive result in gross sales, then these innovations are to be explored by other different shops of the supermarket chain.

It was verified that there is not a formal structure to control and to manage the store image. However, it was also seen in this study that there is a group of activities in the organization that deals with the specific components that affect the retail image, such as: Marketing, Excellence in Service, Human Resources, Architecture and Category Management.

The Marketing area is responsible for the internal communication in the store and deals with activities such as posters, specifications of colors and promotional materials used. There is one specific care in order to prevent visual pollution, maintaining a clear and pleasant communication with clients.

The Excellence of Service area develops and controls the details of each store that could affect the store image. Some examples of activities developed are: the speed of check out attendants and the materials used to decorate the store.

The Human Resources area deals with an important aspect of store atmosphere: the employees' training program. There is a monthly training program to allow the exchange of experience among the employees and where new techniques are communicated.

The Architecture area deals with the structure of the store. It manages the layout, the shelves positioning and the allocation of space to the products sold, applying category management

principles. The specific product lines of each store are defined considering some social and economic variables (such as life style, customers' income, religion) of the place where the store is located.

The following table presents the main components of the store image. The information was gathered from interviews with local managers and reflect the actions that the company takes when dealing with the image components in order to achieve the desired positioning.

Table 2. Store image components and actions performed by the retail chain

Component	Actions
Price of merchandise	Price is neither the highest nor the lowest, but it is perceived to be higher than competition, because of the sophisticated image.
Quality of merchandise	Leading brands with strong quality and image must be on the shelves.
Assortment of merchandise	Assortment must be the deepest and breathiest possible and sophisticated products must be available.
Sales personnel	Well-trained employees serve the clientele and a hostess directs costumers to the desired sessions.
Location convenience	Location is of easy access and a large number of stores are near the customers' residence.
Other convenience factors	All stores have parking and some stores are open 24 hours a day.
Services	Customers are offered a store credit card and a loyalty card.
Sales promotions	Price communications are placed directly on the shelves, using sober colors.
Advertising	The media used for advertising is TV and newspapers.
Store atmosphere	Lightning and music are used to create a pleasurable shop experience.
Institutional	The institutional brand is always connected to sports, quality of life, social responsibility and environment.
Clientele	The target audience is the upper classes, which is coherent with the store-sophisticated image.
Physical aspects	Online and phone shop are available and delivery is also possible.
Post-transaction	The post-transaction channels are: internet sites and hotline.

Source: Elaborated by the authors.

Finally, the fourth proposition declares that private labels add value for the retailer and contribute to construct the positive image of the supermarket. In Brazil, the private label products are generally associated with cheap and unqualified products. Although this general positioning is adopted by other private label programs, in this case study the products compete directly with leading products, but with a price 10 to 15% cheaper.

According to the theory, it is correct to say that the company under study works with two private labels programs: the proprietary brand and the retail brand endorsement. Light products with superior quality, comparing to competitors, compose the first one. These light products are able to create a positive store image and contribute to the customer satisfaction and loyalty. The second private label program displays the name and the identity of the retailer with a specific design of colors, packages and contents. The proposition of this private label program is to create innovation and to add value to the private label lines.

Both private label programs could be classified as the fantasy positioning strategy. The products, as mentioned before, were developed using innovative packages, ingredients and have a high quality standard. Some examples are: the light products line (a new to the world line), the formal structure to develop the products category efforts and the R&D area.

MAIN CONCLUSIONS AND OBSERVATIONS

For the retailer, all marketing decisions had one focal point: the store, where the customer has his or her behavior observed and develops his or her attitude and satisfaction with respect to the store. As retailers have to attract consumers to conclude the sales, retail image is the most effective aspect of a good strategy. Nowadays, with fast movements in our competitive environment, a good image is one competitive advantage that is increasingly more important. A positive store image may generate consumer loyalty and can act as a natural entry barrier to other competitors.

The aspects investigated in this essay were: (1) How does the company deal with the concept of retail image to obtain the target positioning in the market? (2) How does the image affect the satisfaction and loyalty of its clients? (3) How is the image concept structured in the retail company's point of sales? (4) Which measurement instruments are used to evaluate the company image?

The observations made by the authors may suggest some conclusions, outlined in the following sentences. The retailer evaluates its projects and develops its stores in order to create competitive advantages and uses aspects such as size, place, internal disposition of products in order to obtain the desired positioning at the market. This is consistent with the theory exposed in this report, which declares that creating and maintaining a retail image is a complex, multistep and ongoing process. It is a way of applying market segmentation and differentiating a firm from its competitors. It was also seen that this process encompasses far more than a store's atmosphere.

In the retail chain analyzed, the image concept of the retail chain is not formally structured, resulting from a collection of conjoint activities developed by different areas of the company. It can be established that, based on its perceptual map, a positive image could be associated with more loyalty and satisfaction of its consumers.

The private labels managed by the company with its specific characteristics, improve the store image of the retail chain analyzed, and therefore contribute to the company's objectives.

The company does not have a specific tool to control its main aspects of competitive advantage. The analyzed retail chain only studies its perceptual map position using its relative results. The company does not identify the causes of its good or bad performance. The study demonstrates that the company uses research instruments (the perceptual map) only in a passive way to support the marketing actions of the supermarket chain.

Despite the critical points mentioned above, it is important to highlight that the company, so far, has attained the desired positioning objectives through the use of the strategies explained in this part. The follow up activities performed by each area have permitted the maintenance of a retail store image consistency. Nevertheless, in the vision of the authors, more proactive actions will be a must for a good performance of the company in the future.

A relevant limitation of this study is the very nature of the methodology used. Since it is a qualitative research, the results found are not generalizable across the other retail chains. However, this is an attempt to better understand the impact of retail store image on positioning strategies. In this regard, this paper offered a practical contribution, since retailers that are seeking to gain a differential advantage by providing a clear positive image that is distinctive from other retailers could have a clearer idea of the store image impact on its positioning strategies.

Future studies could focus these aspects in other retail chains so that a comparative analysis could be performed among these different supermarket chains. These comparative studies could be done in a larger scale in order to allow for statistical analysis on the following aspects: are there some store image components that influence positively the image formation process? If so, what are these components? How can the company take advantage of working with these components? By answering these questions, future studies could help retailers to better elaborate its positioning strategies.

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