Research report

WHOLESALE & RETAIL SETA
LEADERSHIP CHAIR: GAUTENG

W&RSETA
WHOLESALE & RETAIL SETA
Skills Development for Economic Growth

UNIVERSITY
OF
JOHANNESBURG

Henley
Business School
AFRICA

Project 2024/02

Navigating the merchandiser's dilemma: strategies to mitigate role-related challenges

13 February 2025

Project 2024/02

Navigating the merchandiser's dilemma: strategies to mitigate role-related challenges

Prepared by:

Ms Vickey de Villiers (Henley Business School Africa)

Mr Frans van der Colff (Henley Business School Africa)

Dr Semona Pillay (Wholesale & Retail Sector Education and Training Authority Research

Leadership chair: Gauteng, University of Johannesburg)

Wholesale and Retail Sector Education and Training Authority (W&R SETA) Research

Leadership chair: Gauteng

University of Johannesburg

Copyright and confidentiality

This document is the property of the University of Johannesburg and Henley Business School Africa. Copyright subsists in this work. Any unauthorised reproduction, publication or translation of the work are acts of copyright infringement and make the doer liable for civil law copyright infringement and may make the doer liable to criminal prosecution.

Disclaimer

The views expressed in this report are held by the authors and not necessarily held by Henley Business School Africa, the University of Johannesburg, and the Wholesale and Retail Sector Education and Training Authority.

Acknowledgements

Executive summary

Although merchandising is a key element of the retail industry, the experiences and contributions of merchandisers in South Africa's fast-moving consumer goods (FMCG) retail sector have largely been overlooked in research. External merchandisers typically report to their employer, store management, and suppliers, which creates unique operational dynamics and challenges. This study explores the roles and contributions of merchandisers, the challenges they face within FMCG retail stores, and the strategies proposed to address these difficulties.

This qualitative study employed semi-structured online interviews to gather in-depth insights from 15 merchandisers and 14 managers overseeing merchandisers in various roles. A thematic analysis was conducted using deductive and inductive approaches, with interview transcripts reviewed iteratively to refine codes, themes, and interpretations. To ensure rigour and credibility, multiple quality control measures were implemented, including cross-verification of findings and maintaining comprehensive documentation. Ethical considerations were prioritised throughout all research steps, with participants being aware of the study's purpose, assured of confidentiality, and given the opportunity to participate voluntarily.

The research outlines the crucial role that merchandisers play in maintaining stock availability, product presentation, customer satisfaction, and overall store performance. However, the research also identifies challenges, including role conflict, role ambiguity, and overload, often exacerbated by insufficient communication and the expectation to perform multiple roles. Some merchandisers feel underappreciated and disconnected from the store environment. While certain stores and managers demonstrate positive practices to address these challenges, efforts remain inconsistent across the FMCG retail sector. To address these issues, the study recommends fostering collaboration among all parties involved, enhancing communication, and ensuring that merchandisers are recognised and included.

Contents

Introduction to the study

Consumers in South Africa spent R183 billion on fast-moving consumer goods (FMCG) during the third quarter of 2024 (NielsenIQ, 2024). The FMCG retail sector contributes significantly to South Africa's gross domestic product and supports the development of small, medium, and micro enterprises (Burger, 2021). Additionally, it facilitates skills transfer, contributes to poverty alleviation, and remains a major source of employment (Payi, 2023).

Merchandisers are one of the many job positions created by the FMCG retail sector. Merchandisers are responsible for stock management and shelf layout (MegaVision Media, 2019), focusing on a specific product category (Dawson, 2020) or brand, to optimise shelf space and ensure product visibility and accessibility (Kettle, 2019). Other key tasks include replenishing stock, ensuring accurate and visible pricing, applying promotions (Dawson, 2020), and implementing stock rotation (Kettle, 2019). The nature of merchandisers' work requires them to spend significant time on the shop floor, allowing them to closely observe customer behaviour and gain valuable insights into preferences and challenges faced while shopping (Van der Merwe, 2024).

Merchandisers are a strategically important, yet often overlooked job segment (Meyer, González and Lopez-Lomelí, 2022). This disregard extends to academic research, as there is minimal publicly available research focusing on the experiences and challenges faced by merchandisers. Merchandisers were among the employees interviewed in previous studies on employee theft (De Villiers *et al.*, 2023) and the upliftment and empowerment of employees (De Villiers, Van der Colff and Pillay, 2024) in South Africa's FMCG retail sector. These interviews revealed several challenges faced by merchandisers, including limited career progression opportunities, low salaries, a lack of inclusion and belonging, insufficient communication, minimal information sharing, and feeling undervalued and unrecognised (De Villiers, personal communication, 6 January 2025). Merchandisers are mostly employed by suppliers, manufacturers or third-party agencies, but work on-site at retail stores (Meyer, González and Lopez-Lomelí, 2022). This employment arrangement often results in a complex reporting structure, where merchandisers answer to both their direct employers and retail store managers. Consequently, this increases the likelihood of role conflict, role ambiguity,

and role overload, which are the most prominent role stressors encountered in the workplace (Weiner and Craighead, 2010).

The authors argue that merchandising is one of the most important aspects of the retail industry, with merchandisers directly engaging with customers, possessing valuable knowledge, and playing a key role in realising a customer-centric environment. Given merchandisers' significant, yet often unrecognised role and the complex working relationships they navigate, there is a need to better understand the challenges they experience within the retail store environment and how these challenges can be addressed.

Research objective and areas of exploration

The main aim of this study is to investigate the challenges faced by merchandisers employed in FMCG retail stores and to provide recommendations to overcome these challenges. The following areas of exploration (AoEs) have been defined to fulfil the primary objective:

- AoE 1: examine merchandisers' contribution to customer satisfaction and the overall success of the store;
- AoE 2: determine the nature of the challenges faced by merchandisers in FMCG retail stores from their own and the perspectives of their line managers and more senior managers in FMCG retail stores;
- AoE 3: explore what FMCG retail stores currently do to address the challenges merchandisers face in FMCG retail stores from a merchandiser as well as line manager and more senior manager perspective;
- AoE 4: uncover the perceptions of merchandisers of what could be done by their line managers and more senior managers at FMCG retail stores to address the challenges faced by merchandisers in retail stores; and
- AoE 5: reveal what line managers and more senior managers at FMCG retail stores recommend could be done to address the challenges merchandisers face in FMCG retail stores.

Literature review

This section draws on previous research and existing theories to discuss the key features and mitigating measures of role-related challenges, as well as additional difficulties linked to these concepts.

Contextualising role conflict, role ambiguity, and role overload

According to Kahn *et al.* (1964, p. 19), role conflict is the 'simultaneous occurrence of two (or more) sets of pressures such that compliance with one would make more difficult compliance with the other'. Other key features of role conflict include fluctuating, incompatible, or contradictory requests (Rizzo, House and Lirtzman, 1970), expectations (Schuler, Aldag and Brief, 1977), and requirements (Ghorpade, Lackritz and Singh, 2011). It is not possible to meet all these demands simultaneously (Schmidt *et al.*, 2014), often resulting in uncertainty about which role to address first (Boweni, Van der Westhuizen and Meyer, 2020), or prioritising one over the other (Hecht, 2001). For example, merchandisers may receive competing and contradictory requests from merchandising companies, store managers, and suppliers, making it difficult to satisfy all parties involved. Moreover, role conflict is associated with reluctance to engage with difficult components of the work (Maden-Eyiusta, 2021), increased tension, and reduced job satisfaction (Kahn *et al.*, 1964).

Role ambiguity refers to a 'lack of clarity' (Schuler, Aldag and Brief, 1977, p. 112) or uncertainty regarding expectations (Weiner and Craighead, 2010), performance evaluations (Miles and Perreault, 1976), and performance outcomes (Schuler, Aldag and Brief, 1977). It is also associated with insufficient information or feedback (Pearce, 1981), lack of guidance on which task to prioritise (Arnold *et al.*, 2009), doubt regarding the extent of responsibilities, and whose expectations to prioritise (King and King, 1990). For example, merchandisers may experience uncertainty regarding which tasks to prioritise, such as balancing merchandising duties with requests from store managers, representatives of the merchandising company, and customers. Role ambiguity negatively affects engagement, performance (Maden-Eyiusta, 2021), sense of autonomy, and commitment towards an organisation (Rogelberg, 2007).

Role overload occurs when employees are asked to take on more tasks than they can handle at a time or if the tasks surpass their 'knowledge, skills, and abilities' (American Psychological

Association, 2018). It also involves excessive expectations (Biddle, 1986) and demands (Rogelberg, 2017), with tasks often assigned without consideration or knowledge of an employee's existing workload (Rogelberg, 2007). For example, merchandisers may experience role overload when required to meet tight deadlines for restocking shelves, setting up promotional displays, and responding to simultaneous requests from store managers and merchandising companies. This may cause employees to doubt their ability to sufficiently fulfil their roles (Cooper, Dewe and O'Driscoll, 2001).

Role ambiguity, role conflict, and role overload are distinct concepts, yet they often overlap (Schmidt *et al.*, 2014), with one frequently leading to another (Weiner and Craighead, 2010). For instance, a merchandiser may experience role conflict when faced with concurrent but conflicting demands from different stakeholders. This conflict can create role ambiguity, as the merchandiser is unsure which directive to prioritise. Over time, the pressure of managing these competing demands and uncertainty can lead to role overload.

Additional challenges related to role conflict, role overload, and role ambiguity
Insufficient and ineffective communication contributes to role conflict (Tubre and Collins, 2000), role ambiguity (Bowling *et al.*, 2017), and role overload (Rogelberg, 2007). Additionally, communication (or the lack thereof) is a key factor in determining engagement, trust, and alignment with an organisation's goals (BDO South Africa, 2024). However, previous studies have revealed that communication between managers and lower-level employees is often insufficient (De Villiers *et al.*, 2023; De Villiers, Van der Colff and Pillay, 2024).

The job demands-resources model explains that job demands like role ambiguity, role conflict, and work overload (Schaufeli and Taris, 2014) can result in strain and negatively influence employees' health and job performance (Bakker and Demerouti, 2017). Conversely, job resources, such as appreciation, teamwork, support, positive working relationship with management, and opportunities to participate in decision-making (Schaufeli and Taris, 2014), can help employees achieve work-related goals, buffer the negative effects of job demands or foster 'personal growth and development' (Bakker, Demerouti and Euwema, 2005, p. 170). However, when these job resources are lacking or inaccessible, merchandisers may experience increased difficulty in managing job demands.

These factors are not essential job resources, but are also imperative in fostering employees' sense of belonging, empowerment, and upliftment (De Villiers, Van der Colff and Pillay, 2024), which influence employees' performance and store outcomes. Furthermore, employees who feel unappreciated tend to be less engaged and motivated (Smith, 2010), while perceived exclusion can significantly harm their well-being (O'Hara, 2014).

Mitigating role conflict, role ambiguity, role overload, and related challenges

Prior studies recommend promoting employee participation (Rogelberg, 2007), establishing well-defined roles and clear objectives (Schmidt *et al.*, 2014), providing training, encouraging 'employees to ask questions' (Maden-Eyiusta, 2021, p. 21), scheduling regular meetings to establish clear expectations, and fostering 'positive social interactions' (Montani *et al.*, 2020, p. 636). Several of these mitigating measures involve interactions between managers and employees, highlighting the importance of fostering positive working relationships and mutual engagement.

Sonnentag and Pundt (2016) explained that an increase in leader-member exchange can reduce job stressors. For example, adequate communication between managers and employees helps mitigate role conflict, role ambiguity, and role overload by providing a platform to clarify expectations and manage requirements (Sonnentag and Pundt, 2016). Drawing on social exchange theory, key elements of mutually beneficial exchanges and positive working relationships include 'taking care of employees' (Cropanzano and Mitchell, 2005, p. 882), being concerned about their well-being, providing support, and valuing their contributions (Meira and Hancer, 2021). Other essential components of positive work relationships include transparency (Seppälä and McNichols, 2022), respect (Zenger and Folkman, 2023), inclusive leadership (Adams, Meyers and Sekaja, 2020), and showing individuals that they matter (Ristić, 2024).

Methodology

The methodology section elaborates on the research approach, philosophical underpinning, data collection process, participant profile, data analysis, measures to ensure trustworthiness, and the ethical protocols followed in this study.

Research approach and paradigm

According to Creswell (2013), qualitative research is an emerging and reflective process in which researchers play a central role in data collection. It mostly involves observations and interviews (Tracy, 2020), with a small, purposefully selected sample to clarify 'why', 'how', and contextual questions (Hennink, Hutter and Bailey, 2020). Data is collected in real-life settings, and researchers integrate both inductive and deductive approaches to facilitate comprehensive reasoning, uncover participants' perspectives, and provide a comprehensive overview of the phenomenon being studied (Creswell, 2013).

The interpretivist paradigm is frequently associated with qualitative research (Tshabangu, Ba' and Madondo, 2021). It aims to better understand a specific context and acknowledges various perspectives when interpreting the data (Carson *et al.*, 2001). Furthermore, Pickard (2012) explained that this paradigm often involves conversations with participants and seeking insight into the reasons behind individuals' actions. A qualitative, interpretivist approach complements this study, as it facilitates the exploration of contextual factors as well as the experiences and perspectives of merchandisers and managers.

Data collection

The authors used thoughtfully designed interview guides (May, 2002) to facilitate purposeful conversations (Burgess, 1984) with participants. These semi-structured guides (see Annexure A) included specific questions tailored to each AoE, while also allowing flexibility for participants to share additional insights (Galletta, 2013) and for the interviewers to pose follow-up questions based on participants' responses.

To ensure the effectiveness of the interview guides, pilot interviews were conducted to assess the time allocation, confirm that participants understood the questions, consider the relevance of the responses, and determine whether any modifications were necessary. All interviews were conducted online and lasted approximately 30-45 minutes. To ensure diversity in the sample, an independent research recruitment company facilitated the scheduling of interviews with merchandisers and several managers using purposive sampling techniques.

In July 2024, interviews were conducted with 15 merchandisers affiliated with seven FMCG retailers and nine merchandising entities. The participants comprised seven men and eight women, aged 24-53 years old. Their experience as merchandisers in the retail industry ranged from one to 14 years, and they were based in five major cities: Durban, Johannesburg, Cape Town, Port Elizabeth, and East London.

In August and September 2024, interviews were conducted with 14 managers who worked with or oversaw merchandisers. The participants, comprising nine men and five women, were affiliated with six FMCG retailers that utilised external merchandisers. They served in various management capacities, including supervisors, head office personnel, general managers, heads of departments, store managers, and floor managers.

Data analysis

This study followed an interactive and interrelated data analysis approach established by Creswell (2014), with its key components illustrated in Figure 1. As a first step, the interviews' audio recordings were transcribed to accurately present the primary data. A central part of the analysis involved 'coding and classifying' the data (Mills, Durepos and Wiebe, 2010, pp. 925-926), establishing themes by 'organising codes into meaningful groups' (Naeem *et al.*, 2023, p. 4), and describing and interpreting (Creswell, 2013) these themes. The process was done deductively by applying pre-established categories from prior research and inductively by identifying new categories during the analysis of the current data (Bingham, 2023). To make this possible, the transcripts were read multiple times, with frequent refinement of the codes, themes, descriptions, and interpretations.

Figure 1: Data analysis in qualitative research

Raw data (transcripts, fieldnotes, images etc.)	Step 1: Organising and preparing data for analysis	Step 2: Reading through all data	Step 3: Coding the data	Step 4: Themes and description	Step 5: Interrelating themes/ descriptions	Step 6: Interpreting the meaning of themes/ descriptions

Throughout the steps: Validating the accuracy of the information
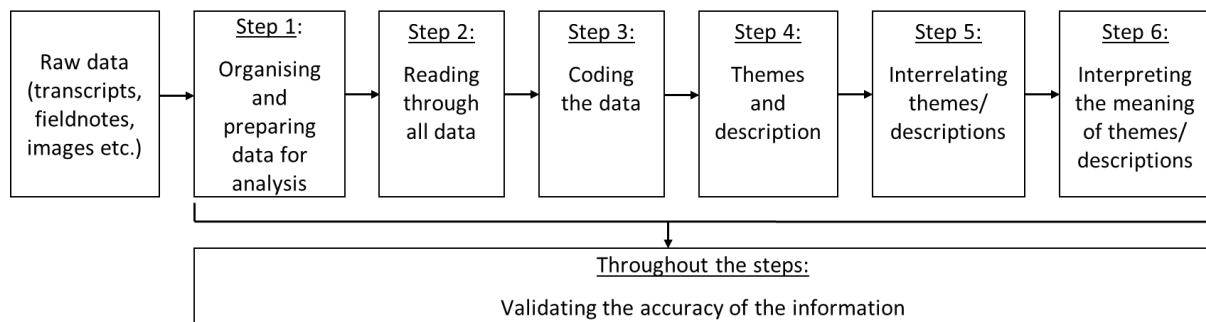
Source: adapted from Creswell (2014).

To ensure qualitative research is trustworthy and credible, Yin (2011) emphasised the importance of maintaining a transparent, methodical, and evidence-based process. Therefore, multiple quality checks and control measures were implemented throughout the study. Several interviews involved the participation of a second author, who later verified that the analysis, findings, and interpretations accurately reflected the primary data. Comprehensive records were maintained to document the research procedures and progress. Additionally, desktop research and the extensive industry experience of one of the authors were used to enhance and corroborate the findings.

Research ethics

The authors prioritised the well-being and dignity of participants and adhered to the university's principles of academic rigour, integrity, and professionalism throughout the research process. Participants received an information sheet (see Annexure B) outlining the study's purpose, the research process, the measures to ensure confidentiality, the recording arrangements, and the intended use of the data. Participants then signed a consent form (see Annexure C) to confirm their understanding of the research purpose, voluntary participation, ability to withdraw at any time, and affirm their awareness and agreement to the participation requirements. Furthermore, the interview transcripts were anonymised promptly to remove any identifying information about individuals or organisations.

Analysis and findings

In this section, the experiences and perspectives of the merchandisers and managers who participated in the interviews are outlined. The discussion is organised according to each AoE,

incorporates direct quotes to illustrate key themes, and highlights how the findings align with prior research and industry insights.

AoE 1: merchandisers' contribution to customer satisfaction and store success

Merchandisers are responsible for replenishing shelves, setting up displays, conducting stock rotation to remove expired or damaged products, maintaining neat and clean shelves, updating product labels, assisting with in-store promotions, helping customers locate items, and requesting stock orders. These actions not only focus on ensuring stock availability, but also keep customer service at the forefront of their efforts and drive sales performance. The merchandisers revealed:

> If the customer is looking for something, for a certain type of brand, I go to a storeroom, find it for the customer then I give it. It does not mind [*sic*] if it is not my stock. So, I help the customer.
>
> (Merchandiser 2)

> Where are you going to find the stock when there are no merchandisers … we are the hands that help. We are the ones in the middle, the medium that takes the stock from where it comes from manufacturing to the hands of the customer.
>
> (Merchandiser 5)

> To make sure that my shelves are neat, I'm gonna [*sic*] say it's appetising for the customer to come and buy in my store. So, I'm pushing sales doing that.
>
> (Merchandiser 7)

> The merchandisers are the people who always make sure that everything is in the store, everything is in the aisles, all the labels are updated, no expired stock in the shelves.
>
> (Merchandiser 12)

> We are the ground staff, we communicate on a daily basis with the customer, and we learn to know the customer better. Especially when it's the regular customer,

we know their ins and outs, we know their likes and dislikes, and that is how we improve the customer service in the store.

<div align="right">(Merchandiser 15)</div>

Managers concurred that merchandisers contribute to customer satisfaction and the overall success of the store. Key contributions include keeping shelves stocked, assisting with promotions, setting up displays, engaging with customers, possessing specialised product knowledge, and sometimes helping with tasks beyond their direct job descriptions. Managers shared the below during the interviews:

From a customer-facing point of view and a customer experience point of view they [merchandisers] are, I mean, they are really at the heart of that as well.

<div align="right">(Manager 1)</div>

So, definitely it's a very important role in retail, if not one of the most important roles when it comes to stock to floor.

<div align="right">(Manager 3)</div>

In terms of doctors, you get a general surgeon, and then you get a specialist. So, I think of the merchandisers as specialist surgeons in terms of the health of the business.

<div align="right">(Manager 5)</div>

I think they are the eye and ears of the business as well as the ambassadors, because they know the retail industry well, and then I mean from the stockroom till the sales floor, they know everything about the stock.

<div align="right">(Manager 14)</div>

Merchandising is increasingly important in the retail industry (Topps and Taylor, 2018) and makes it possible for retailers to 'make the market place innovative, exciting and stimulating' (Varley, 2006, p. 183). Aesthetic presentation will direct customers' attention towards the products and promote sales (Ebster and Garaus, 2015). On the contrary, retail stores risk

losing sales and customers when products are not available on their shelves (Emberson *et al.*, 2006). The study's findings support these perspectives, emphasising the critical role that merchandisers play in stock availability and product displays, which directly impact customer satisfaction and overall store success. Moreover, industry insights highlight that merchandisers possess valuable insights, as their product knowledge and presence on the shop floor give them a deep understanding of product performance, customer preferences, and shopping behaviours (Van Der Colff, personal communication, 8 August 2024).

AoE 2: challenges faced by merchandisers in FMCG retail stores

Role conflict, role ambiguity, and role overload

Merchandisers often struggle to simultaneously satisfy store managers, merchandising company managers, and suppliers due to conflicting instructions and expectations regarding their tasks. The limited on-site presence of merchandising managers, coupled with insufficient communication between store and merchandising managers, further intensifies role conflict and role ambiguity, especially when managing tasks across multiple product lines. Merchandisers' thoughts on the topic included:

> We find it so difficult because your company manager has told you to do this, and when you go to the store manager and ask him, he will tell you not to do that. So, it's very difficult, because they're expecting different things from us.
>
> (Merchandiser 4)

> Today, they gonna [*sic*] say you must pack this to this side, and the other one will come and say the other one. So, I feel that it is more challenging. Like having two bosses at the same time…. It is like they're not even communicating.
>
> (Merchandiser 8)

> Now you want me to redo what we already did on his [the store manager] way not by her [the merchandising company] way, so now I'm confused. I really don't know now which one is which.
>
> (Merchandiser 11)

> I think we're working for two employers at the same time – that is, the company that I'm working for and the specific retail company – and sometimes it's very difficult to satisfy both.
>
> (Merchandiser 13)

Managers described role conflict and role ambiguity for merchandisers as a struggle to satisfy multiple 'bosses' who sometimes have conflicting demands. Merchandisers often face dilemmas where they must decide whether to follow instructions from store managers, merchandising company managers, or suppliers, often leaving them 'caught in the middle' as they try to balance competing priorities and satisfy all stakeholders. Managers shared:

> I think, fundamentally, the merchandiser has too many bosses. The store manager is the boss, the rep is the boss, the vendor is the boss. So, which boss do I listen to?
>
> (Manager 2)

> Here is a dilemma that he either listens to me or listens to his representative. You understand? It's a rock and hard place because we have a relationship in the store, but he also needs to report to the rep.
>
> (Manager 4)

> He has to satisfy all principles at the same time, he has the needs of his rep, and then there's also me as the manager that has other things that we want him to focus on.
>
> (Manager 5)

> So, they are caught up in the middle. They have to please the store, and they also have to please the company that they are merchandising for, you know? And it's a confusion for them. I come in the morning and I say, 'This is what I want,' and yet, the company they are merchandising for has told them something different.
>
> (Manager 12)

Merchandisers often feel overloaded as they are frequently asked to perform tasks beyond their job descriptions, such as organising the stockroom and packing products not assigned to them. While they are generally willing to help, these requests often come shortly before their shifts end, conflict with the scope and expectations set by their merchandising company, go unrecognised, and involve responsibilities designated for in-house staff. Many also struggle to complete an excessive workload within the time available. Some merchandisers agree to extra duties due to positive relationships with store management, while others feel pressured to comply out of fear of negative consequences. The participants revealed:

> I heard on other shops it's not this retail company only, but other shops, you know? They complain, my colleagues complain about their managers that they use them, you know? If it's time for them to clock out, they don't want them to clock out, they have to pack other products that they don't pack for their companies.
>
> (Merchandiser 1)

> Some managers will tell you 'Go and pack this stock.' And when you see that stock, it's not for your company; it's the stock for another company. So, that is a big challenge for me, because I'm not allowed to do that. Then if I refuse, they will take you like you're not doing your job.
>
> (Merchandiser 4)

> We have this culture around them that if you don't do as I tell you, I'm going to throw you out the store, because actually, you don't work for me, and therefore you're replaceable.
>
> (Manager 2)

Sense of exclusion and limited collaboration
Some merchandisers mentioned feeling excluded and treated differently to retail store employees. They recalled being excluded from meals and events, and being regarded as outsiders or tenants, leaving them feeling unwanted and replaceable. Some merchandisers also noted that store staff seldom assist with replenishing shelves during times of significant

pressure. A few managers acknowledged that merchandisers often lack a sense of belonging and are subjected to different treatment than store employees. Examples of this feedback include:

> Most of the time, I wouldn't say I'm a part of the retail company's staff, but as merchandisers, most of the time, we just have a conversation on our own. At lunch, we eat on our own, so I wouldn't say I'm a family through the retail store.
>
> (Merchandiser 1)

> It's hard to get support from them, because they're not your managers, they think you have to have that support from your own manager…. If there's something going on, you know it is for the staff only … but when they want things from you, they say you are staff.
>
> (Merchandiser 7)

> With regard to your staff, you will check their performance and reward them on the performance that they've done, but with the merchandiser, it's just somebody that's invisible, that just come and pack the stock and then leave [*sic*]. Whether they are on lunch or anything, no one follows those things up, unless, you know, you are concerned about their well-being and stuff like that.
>
> (Manager 13)

Insufficient communication and opportunities to provide inputs
Several merchandisers expressed that communication from store managers is insufficient, primarily focused on tasks or store performance, rather than engaging with them. Despite their first-hand knowledge of stock performance and customer interactions, some merchandisers noted they are rarely consulted for ideas, and when they do provide input, it is often taken for granted. Furthermore, a few managers acknowledged these communication shortcomings. During the interviews, the participants shared:

> They never ask us about the challenges, they never ask us about how we feel.
>
> (Merchandiser 11)

The store managers think that the company needs to communicate to the merchandiser and the supply merchandise company makes the assumption, but the store will communicate, and there is no defined role.

(Manager 1)

I don't think they do get respect enough, you know? Because they don't have a say…. So, their voice is not heard.

(Manager 12)

Lack of recognition, appreciation, and respect

Some merchandisers felt that their work often goes unnoticed and undervalued, citing instances where both managers and customers show minimal recognition or gratitude and often lack respect for their efforts. A few managers agreed, noting similar observations. The participants revealed:

They are not respected enough in their role…. You would actually get that store manager sometimes, you know, that doesn't really appreciate the effort you put in, the amount of work that you have.

(Merchandiser 10)

Their time of saying thank you to us are very slim [*sic*]. They are always looking for something that's gonna [*sic*] *trek* us down: 'You're not doing this right. You're not doing this right.' Their time of them saying, 'Well done, guys' are very slim.

(Merchandiser 11)

Even us here in the store, we don't recognise them. The only thing that we want, just pack the shelf, pack the shelf, pack the shelf. There's no gratitude towards them, so it kills the morale in them.

(Manager 6)

Additional challenges

Other challenges mentioned by some participants included stockroom- and stock-related issues (e.g., difficulty locating items and stock imbalances), restrictions on their breaks, treatment by customers, and the ease with which they are asked to leave the store. During the interviews, participants also identified difficulties faced by FMCG retail stores and challenges related to merchandising companies, including salaries, career progression, working hours, oversight, and a sense of 'disconnect'. These challenges are acknowledged, but fall beyond this study's scope. Further research is encouraged to holistically understand and address these areas.

Alignment with prior research and industry insights

Similar to the experiences described by merchandisers during the interviews, role conflict and role overload are often experienced as being pulled 'in different directions' (Bowling *et al.*, 2017, p. 4) and having to fulfil multiple roles (Nerstad *et al.*, 2023). Previous studies on the FMCG retail sector in South Africa (De Villiers *et al.*, 2023; De Villiers, Van der Colff and Pillay, 2024) reveal that some employees, including merchandisers, reported a limited sense of belonging, low levels of engagement, and insufficient recognition, appreciation, and communication. Industry insights reveal several challenges faced by merchandisers, including uncertainty about where they fit in, being treated with disrespect, feeling excluded from the team, lacking a sense of belonging, and having to fulfil multiple roles (Van Der Colff, personal communication, 1 August 2024). These findings align with the challenges described by participants in this study.

AoE 3: current efforts by FMCG retail stores to address merchandisers' challenges

There are attempts by FMCG retail stores to address difficulties facing merchandisers. Positive examples noted by merchandisers include being asked for input, managers and store staff assisting to pack during busy periods, open communication, managers who know their names and check on their well-being, and a welcoming environment where they are treated as part of the team. A few merchandisers also highlighted moments of recognition and appreciation from managers, such as acknowledgement of their hard work and reminders of their valuable contributions. Quotes from participants included:

He tries to get to know all of us, you know? He knows the majority of us by name, if not all, to be mistaken, I think he knows all of us by name. He tries to at least make us feel very welcome, and he's open, someone you can approach and communicate with him, if you have an issue or something maybe occurring…. I feel like here at this retailer, I am being treated at least better, you know? They do try to acknowledge us for our work, which goes a long way, you know? It is motivating.

(Merchandiser 3)

They do come and ask for ideas…. It makes me feel special, I feel so special because of they can see my input in the store.

(Merchandiser 6)

The store that I'm working in, I think they do appreciate, the one that is in charge now he does really appreciate the merchandisers.

(Merchandiser 8)

It is for the first time with this guy, I'm telling you for the past 10 years, you will never find that. But this guy he is magic … he will come and say to you, 'We are going on promotion, what do you need? Do you think this is sufficient to last us for the next two weeks?' You see, it's a step in the right direction.

(Merchandiser 13)

Positive practices noted by managers include sharing business information, fostering supportive relationships, treating merchandisers as part of the team by including them in activities, such as training and social events, and assisting with tasks during busy periods. In addition, some managers mentioned recognising merchandisers through tangible tokens of appreciation, such as vouchers and rewards, verbal acknowledgements, and emphasising their important contributions. The managers contributed the below opinions:

I convene a meeting with my merchandisers. I mean, last time I convened a meeting, they were shocked, a GM [general manager] coming to talk to us, it has never happened.

<div align="right">(Manager 4)</div>

It's all about recognition. We do things like where we do small rewards on the spot, rewards for merchandisers when a job is well done, or when the job was executed on time, everything was right before we launched.

<div align="right">(Manager 9)</div>

We count them as part of us, whereby whenever we serve any tea break for their tea breaks, they do get that offer as well. We do not sideline them and say maybe we have a Christmas lunch; they are also a part of us.

<div align="right">(Manager 11)</div>

Two managers described a merchandiser-focused project implemented at two retail stores. Key features of the project included alignment and buy-in between the retail stores and the merchandising company. Shifts were determined based on operational requirements, merchandisers worked across products and categories assigned to the merchandising company, clocked in, and were monitored by an on-site manager. The retailer also provided weekly feedback reports to the merchandising company. As a result, the stores benefited from greater control, higher standards, and increased loyalty over time. In turn, merchandisers felt part of a team and became proud of their job. The managers stated:

When we got it right, I saw how that merchandiser changed, that person became proud of its job, was part of a team, yielded. It worked like a Swiss watch, how everybody pulled in … it was remarkable and incredible. And everybody, all three of these parties, benefited by the output.

<div align="right">(Manager 1)</div>

When you pull them closer to you, you are their person, so they actually look better after your business because you have that relationship with them, and you actually include them in the success of the business.

<div align="right">(Manager 3)</div>

These current efforts were praised, but several participants indicated that such positive actions are not consistent across all managers or stores. There are opportunities to learn from those actively addressing the challenges faced by merchandisers, build on the success of current initiatives, and implement additional measures.

AoE 4 and AoE 5: recommendations to address the challenges faced by merchandisers in FMCG retail stores

Open communication and dialogue

Merchandisers and managers highlighted the need for improved communication and the importance of open relationships. Recommendations included regular meetings and open dialogue between merchandising companies, store managers, merchandisers, and suppliers. Merchandisers suggested meetings to exchange ideas, voice challenges, and discuss their feelings, treatment, and any changes made. Managers emphasised the importance of filtering information down, sharing goals, and clarifying roles to ensure alignment and keep everyone informed. The participants revealed:

I think our managers from the company and from the store, they should just have to sit down and talk about it, and just call a meeting for all of us, you know, just share our challenges, share our ideas with them, both of them.

<div align="right">(Merchandiser 4)</div>

It is our wish that they communicate with us…. It's my wish that we create a platform like this, whereby it's not only us, but we invite them also so that we exchange ideas, we talk about whatever that we are unhappy with…. In a way, we can be able to meet each other halfway.

<div align="right">(Merchandiser 13)</div>

There's nothing better than communication … less communication cause confusions [*sic*] and uncertainty, because people don't know what to expect…. More communication makes things much more easier and clearer, it cuts out the confusion, everybody knows what is expected.

<div align="right">(Manager 8)</div>

You have to push or work harder to get proper communication between the store, between the managers, and the merchandisers.

<div align="right">(Manager 11)</div>

Sense of inclusion and collaboration

Several participants highlighted the need for inclusivity and belonging, suggesting that merchandisers should be treated as equal team members, not outsiders. This includes being involved in store activities, made to feel part of the team, and collaboration between merchandisers and store staff. Both merchandisers and managers agreed that fostering an inclusive and collaborative environment would improve performance and create a better working atmosphere. Feedback from the participants included:

For us to get their store 100% the way they will like the stores to be is to work with us, treat us as their own…. You're gonna [*sic*] see the moment all of us working together as a team, this is about team. If there's teamwork, I'm telling you, there'll be no complaints in the store.

<div align="right">(Merchandiser 7)</div>

I think the best thing that they must do at least they must work with us; they must meet us halfway. If we are doing this together, we are pushing together, then we can get something that will be nice, the achievement.

<div align="right">(Merchandiser 12)</div>

Merchandisers, when they felt that they are at home … they come into a store, they are respected, they are accounted for, they are part and parcel of the synergy

of the store. They [are] wonderful to work with and they give their best, that I know of.

<div align="right">(Manager 9)</div>

They will definitely perform much better because that way they are going to feel like they are part of the business. They are getting more involved, and now their perception will change, they will treat the businesses as their own.

<div align="right">(Manager 14)</div>

Seeking merchandisers' input

Merchandisers recommended that managers actively seek and consider their input. As merchandisers handle stock and interact with customers daily, they have an excellent understanding of customers, knowing which items are popular and which may require more visibility. Their insights could assist with stock placement, product displays, ordering, and promotions, ultimately improving sales and customer satisfaction. Furthermore, the merchandisers affirmed:

I think it'd be a good idea because we know the product, we know if something's on promotion, we know if something's not selling that much, we'll know if this is a running product.

<div align="right">(Merchandiser 2)</div>

When there is someone like that, he makes me feel better, feel like a person…. Once that person comes to you, that means a lot, that means he sees something in you.

<div align="right">(Merchandiser 12)</div>

Respect and appreciation

Merchandisers emphasised the importance of respect and complimenting them when they perform well. Managers recommended showing appreciation by thanking merchandisers and acknowledging their extra efforts, noting that this would encourage them and positively impact the store and customers. On this topic, the participants asserted:

I think that's the most important thing, just respect one another and just try to work with each other.

(Merchandiser 1)

Because you feel you're important, you feel somebody is appreciating what you're doing … you're looking forward to go to work.

(Merchandiser 13)

We just need to appreciate our merchandisers, because at the end of the day, they make sure that the customers go out happy.

(Manager 7)

We should take note of them, we should not ignore them because they want to know, they want to make things right in the store. So, we should give attention to them as well, just like we do to the staff.

(Manager 10)

Additional recommendations

Further recommendations include career progression opportunities, training and team-building activities, maintaining a well-organised stockroom, providing more support and oversight from store management, and offering exposure to tasks like ordering and product demonstrations. Similar to the challenges, the remaining recommendations were directed at the merchandising companies and fall beyond the scope of what FMCG retail stores can do to address the store-related challenges faced by merchandisers.

Alignment with prior research and industry insights

Employee empowerment, information sharing, recognition, and training can help mitigate job demands, such as role conflict, role overload, and role ambiguity, as well as reduce burnout (Vieira, 2017). Furthermore, listening to employees' concerns and perspectives contributes to an open and collaborative work environment (Gavin, 2020). Industry insights show that involving merchandisers in store activities, such as floor walks, and actively seeking their input

provide valuable insights, boost their motivation and enjoyment, and foster better working relationships through greater inclusion (Van Der Colff, personal communication, 8 August 2024). These actions align with the recommendations proposed by study participants and have the potential to benefit merchandisers, retail stores, merchandising companies, and suppliers.

Summary of findings

Table 1 outlines the interview questions and summarises the core themes and findings of each AoE for merchandisers and managers.

Table 1: Key questions, themes, and findings for each AoE

	Interview questions	Themes and findings
AoE 1: examine merchandisers' contribution to customer satisfaction and the overall success of the store		
Merchandisers	• What do you see as your role in contributing to the satisfaction of customers? • What do you see as your role in contributing to the overall success of the store?	• Key tasks performed by merchandisers include replenishing shelves, setting up promotions and displays, removing expired or damaged stock, keeping shelves neat and clean, updating labels, assisting customers in finding specific items, and coordinating with managers to reorder stock. All these tasks contribute to sales. • Merchandisers are essential for stock availability, with customer satisfaction being central to their efforts.
Managers	• What role do you think merchandisers play in contributing to the satisfaction of customers? • What role do you think merchandisers play in contributing to the overall success of the store?	Merchandisers play a crucial role in getting stock on the floor and keeping shelves stocked. They assist with promotions, product displays, often have specialised product knowledge, occasionally take on additional responsibilities, and directly impact customer experience.
AoE 2: determine the nature of the challenges faced by merchandisers in FMCG retail stores from their own and the perspectives of their line managers and more senior managers in FMCG retail stores		
Merchandisers	• Considering the FMCG retail store where you work, what are the main challenges you face as a merchandiser? (Prompt: role conflict, sense of recognition and inclusion, evaluation of their performance and well-being, etc.) • How do these challenges stand in your way when trying to create a customer-friendly environment?	Core challenges include role conflict, role overload, lack of recognition, a sense of exclusion, different treatment compared to store employees, insufficient communication, and not seeking merchandisers' opinions. Challenges associated with merchandising companies were also mentioned, but fall beyond the scope of this study.

		Interview questions	Themes and findings
Managers		• What do you believe are the primary challenges faced by merchandisers in retail stores? (Prompt: role conflict, sense of recognition and inclusion, evaluation of their performance and well-being, etc.) • How do these challenges impact the customer experience in the store? • Do you think that these challenges impact the overall success of the store?	Challenges faced by merchandisers mainly pertain to role conflict and a sense of exclusion. While challenges experienced by FMCG retail stores and those related to merchandising companies were also mentioned, these fall beyond the scope of this study.
AoE 3: explore what FMCG retail stores currently do to address the challenges merchandisers face in FMCG retail stores from a merchandiser as well as line-manager and more senior manager perspective			
Merchandisers		• What support do you currently receive from your line manager and more senior managers in the retail store to make your work easier and more enjoyable? • How do you perceive the level of communication and collaboration between you and your store managers in addressing challenges? • Can you share any examples of where you received support or information from the retail store to make your work more meaningful?	Merchandisers highlighted positive experiences, such as being included in communication and team activities, receiving recognition and appreciation for their contributions, and feeling supported through open communication and assistance during busy periods.
Managers		• Are there any strategies or initiatives in place at the store to address the challenges faced by merchandisers? • Can you provide examples of successful interventions or support mechanisms that have helped alleviate challenges for merchandisers in your store? • Do you believe that the level of communication and collaboration between merchandisers and their line managers in the store are sufficient?	Managers described efforts to foster collaboration and recognition, sharing business information, including merchandisers in team activities, offering tangible and verbal acknowledgements of their contributions, and creating a supportive team environment.
AoE 4: uncover the perceptions of merchandisers of what could be done by their line managers and more senior managers at FMCG retail stores to address the challenges faced by merchandisers in retail stores; and AoE 5: reveal what line managers and more senior managers at FMCG retail stores recommend could be done to address the challenges merchandisers face in FMCG retail stores			
Merchandisers		• What more could be done by your managers at the FMCG retail store to help address the challenges you face when doing your work? • What resources or tools do you believe would help you better address the challenges you face as a merchandiser? • What suggestions do you have for improving the working conditions and support for merchandisers in retail stores?	Merchandisers recommended open communication, a sense of inclusion, being treated as equal team members, having their input heard, and receiving respect and recognition for their contributions.
Managers		• What do you believe could be done by line managers and senior managers at FMCG retail stores to assist merchandisers with the challenges facing them? • Do you have any recommendations for improving the working conditions and support for merchandisers in retail stores?	Managers recommended improved communication and dialogue, fostering an inclusive environment, and showing appreciation and recognition for merchandisers' efforts.

Conclusion and recommendations

This section synthesises the study's key findings and provides actionable insights to help retail stores address the challenges faced by merchandisers within the store environment. The guidelines emphasise collaboration, open communication, inclusion, and recognition to encourage a supportive work environment that benefits merchandisers and retail stores.

Main findings and reflections from the literature review and interviews

This study reveals several key insights into merchandisers' roles, challenges, and potential solutions. Both literature and interviews highlight merchandisers' critical role in ensuring stock availability on the shelves and attractive product presentation, which directly impact sales. Their product knowledge and understanding of customer preferences position them as essential contributors to customer satisfaction and overall store performance.

Examining the challenges faced by merchandisers within the retail store environment reveals issues, such as role conflict, role ambiguity, and role overload. These challenges manifest through insufficient communication and the need to fulfil multiple roles. Merchandisers often feel excluded, treated differently from store employees, and experience a limited sense of belonging, lack of recognition, and low engagement in their work environment.

The exploration of what FMCG retail stores are currently doing to address these challenges yielded mixed findings. While some stores promote communication, collaboration, and inclusion, these efforts are not consistent across all managers or stores. Efforts to assist merchandisers and recognise their contributions were noted, but implementation levels varied.

Merchandisers and managers suggested improvements centred on enhanced communication, greater collaboration, and fostering a sense of inclusion. Literature supports these views, emphasising the importance of clear role definitions, regular engagement, positive recognition, and opportunities for merchandisers to participate and provide input. Respect, appreciation, and treating merchandisers as equal team members were consistently highlighted as critical to improving their working experience.

Recommendations

Addressing the challenges faced by merchandisers requires a collaborative, multi-party approach involving merchandising companies, suppliers, merchandisers, and retail stores. Since retail stores are pivotal in shaping the daily work environment of merchandisers, communication, inclusivity, and recognition within the store environment are imperative. This practice is mutually beneficial: for merchandisers, it fosters a sense of value, belonging, and ownership, and in turn, engaged and motivated merchandisers will contribute to profitability, customer satisfaction, and the overall success of the store.

The following guidelines present key practices that retail stores can implement to address the challenges faced by merchandisers, with a specific focus on addressing role conflict, role ambiguity, role overload, and other role-related challenges:

- Facilitate regular meetings to promote open communication and collaboration between merchandising companies, retail stores, suppliers, and merchandisers. These sessions should aim to synergise efforts, aligning common goals and operational requirements.

- Establish and reinforce clear job descriptions, roles, responsibilities, objectives, and expectations for merchandisers.

- Recognise and value merchandisers by acknowledging and thanking them for their efforts, showing respect, celebrating their successes, and getting to know them as individuals. Affirm their bigger purpose in the store and the important role they play in driving customer centricity, profitability, and the overall success of the store.

- Foster open communication by encouraging formal and informal exchanges of ideas, challenges, and feedback. Actively engage with merchandisers to gather their perspectives, keep everyone informed, and ensure they feel comfortable voicing their opinions. Encourage questions, value their input, and ensure that managers remain approachable and available for meaningful conversations.

- Promote inclusion and a sense of belonging by involving merchandisers in store activities, such as floor walks, training, and team-building events, to ensure they feel integrated into the store's daily operations. Include them in key discussions and strategy meetings and provide them with the same induction as store staff. This fosters a collaborative

environment where merchandisers understand the store's goals and achievements, contributing to a unified, team-orientated atmosphere.

Synthesis

Figure 2 synthesises the overarching insights from the study by linking literature and industry insights, key interview themes and findings, and corresponding recommendations for each AoE.

Figure 2: Integrated summary of literature, interview findings, and recommendations for each AoE

Aim	AoE	Literature and industry insights	Key interview themes and findings	Recommendations
Primary objective: investigate the challenges faced by merchandisers employed in FMCG retail stores and provide recommendations to overcome these challenges.	AoE 1: examine merchandisers' contribution to customer satisfaction and the overall success of the store	Stock presentation and availability influence sales. Merchandisers have valuable insights regarding products, customer preferences, and shopping behaviour.	Merchandisers are essential for stock availability and presentation. Their product knowledge and contributions are central to customer service.	Affirm and value the distinctive impact of merchandisers on the functioning and success of the store.
	AoE 2: determine the nature of the challenges faced by merchandisers in FMCG retail stores from their own and the perspectives of their line managers and more senior managers in FMCG retail stores	Limited belonging, low engagement, lack of recognition, insufficient communication, exclusion, and having to fulfil multiple roles. These align closely with role conflict, role ambiguity, and role overload.	Role conflict, role overload, role ambiguity, sense of exclusion, insufficient communication, lack of recognition, different treatment than store employees, and not being asked to provide their input.	Facilitate discussions where all parties openly share their challenges, ensuring mutual understanding and awareness of each other's difficulties.
	AoE 3: explore what FMCG retail stores currently do to address the challenges merchandisers face in FMCG retail stores from a merchandiser as well as line manager and more senior manager perspective	Employee participation, well-defined roles, clear objectives, training, encouraging employees to ask questions, regular meetings to establish expectations, communication, positive social interactions, empowerment, information sharing, and recognition are key factors. Positive work relationships and interactions can be fostered by showing respect and appreciation, seeking input, and promoting inclusion.	Varied levels of inclusion in team activities, communication, information sharing, collaboration, assistance with tasks, recognition, and appreciation.	Encourage the consistent implementation of these initiatives across all departments and by all managers.
	AoE 4: uncover the perceptions of merchandisers of what could be done by their line managers and more senior managers at FMCG retail stores to address the challenges faced by merchandisers in retail stores AoE 5: reveal what line managers and more senior managers at FMCG retail stores recommend could be done to address the challenges merchandisers face in FMCG retail stores		Improved communication among all stakeholders, a sense of inclusion, being treated as equal team members, collaboration between merchandisers and store staff, having their input heard and considered, as well as receiving respect, appreciation, and recognition.	Foster communication and collaboration among all parties, clarify the scope of roles and expectations, recognise and value merchandisers, actively engage with them to gather their insights, and promote inclusion and a sense of belonging.

References

Adams, B.G., Meyers, M.C. and Sekaja, L. (2020) 'Positive leadership: relationships with employee inclusion, discrimination, and well-being', *Applied Psychology*, 69(4), pp. 1145-1173. Available at: https://doi.org/10.1111/apps.12230 (Accessed: 3 January 2025).

American Psychological Association (2018) 'Role overload', in *APA dictionary of psychology*. Available at: https://dictionary.apa.org/role-overload (Accessed: 18 December 2024).

Arnold, T., Flaherty, K.E., Voss, K.E. and Mowen, J.C. (2009). 'Role stressors and retail performance: the role of perceived competitive climate', *Journal of Retailing*, 85(2), pp. 194-205. Available at: https://doi.org/10.1016/j.jretai.2009.02.002 (Accessed: 18 December 2024).

Bakker, A.B. and Demerouti, E. (2017) 'Job demands-resources theory: taking stock and looking forward', *Journal of Occupational Health Psychology*, 22(3), pp. 273-285. Available at: https://doi.org/10.1037/ocp0000056 (Accessed: 21 December 2024).

Bakker, A.B., Demerouti, E. and Euwema, M.C. (2005) 'Job resources buffer the impact of job demands on burnout', *Journal of Occupational Health Psychology*, 10(2), pp. 170-180. Available at: https://doi.org/10.1037/1076-8998.10.2.170 (Accessed: 21 December 2024).

BDO South Africa (2024) *Frontline retail workers can make or break the customer experience, and in turn the business*. Available at: https://www.bdo.co.za/en-za/insights/2024/advisory/frontline-retail-workers-can-make-or-break-the-customer-experience,-and-in-turn-the-business (Accessed: 20 December 2024).

Biddle, B.J. (1986) 'Recent developments in role theory', *Annual Review of Sociology*, 12(1), pp. 67-92. Available at: https://doi.org/10.1146/annurev.so.12.080186.000435 (Accessed: 18 December 2024).

Bingham, A.J. (2023) 'From data management to actionable findings: a five-phase process of qualitative data analysis', *International Journal of Qualitative Methods*, 22. Available at: https://doi.org/10.1177/16094069231183620 (Accessed: 1 January 2025).

Boweni, G.P., Van der Westhuizen, P. and Meyer, L. (2020) 'Role conflict experienced by primary school educators in North West, South Africa', *Africa Education Review*, 17(5), pp. 1-18. Available at: https://doi.org/10.1080/18146627.2020.1747359 (Accessed: 8 December 2024).

Bowling, N.A., Khazon, S., Alarcon, G.M., Blackmore, C.E., Bragg, C.B., Hoepf, M.R., Barelka, A., Kennedy, K., Wang, Q. and Li, H. (2017) 'Building better measures of role ambiguity and role conflict: the validation of new role stressor scales', *Work & Stress*, 31(1), pp. 1-23. Available at: https://doi.org/10.1080/02678373.2017.1292563 (Accessed: 19 December 2024).

Burger, S. (2021) 'South Africa must strive to more effectively balance lives and livelihoods with Covid-19 regulations, says CGCSA', *Engineering News*, 26 August. Available at: https://www.engineeringnews.co.za/article/south-africa-must-strive-to-more-effectively-balance-lives-and-livelihoods-with-covid-19-regulations-sayscgcsa-2021-08-26 (Accessed: 13 January 2025).

Burgess, R.G. (1984) *In the field: an introduction to field research*. London: Allen & Unwin.

Carson, D., Gilmore, A., Perry, C. and Gronhaug, K. (2001) *Qualitative marketing research*. London: Sage.

Cooper, C.L., Dewe, P.J. and O'Driscoll, M.P. (2001) *Organizational stress: a review and critique of theory, research, and applications*. Thousand Oaks, CA: Sage.

Creswell, J.W. (2013) *Qualitative inquiry and research design: choosing among five approaches*. 3rd edn. Thousand Oaks, CA: Sage.

Creswell, J.W. (2014) *Research design: qualitative, quantitative, and mixed methods approaches*. 4th edn. Thousand Oaks, CA: Sage.

Cropanzano, R. and Mitchell, M.S. (2005) 'Social exchange theory: an interdisciplinary review', *Journal of Management*, 31(6), pp. 874-900. Available at: https://doi.org/10.1177/0149206305279602 (Accessed: 23 December 2024).

Dawson, A. (2020) 'How automation can simplify the job of the merchandiser', *Bizcommunity*, 16 March. Available at: https://www.bizcommunity.com/Article/196/185/201591.html (Accessed: 14 January 2025).

De Villiers, V., Van der Colff, F. and Pillay, S. (2024) *Unlocking the potential of lower-level employees: a collaborative approach for upliftment and empowerment in South Africa's FMCG retail sector*. Available at: https://content.henleysa.ac.za/a-collaborative-approach-for-upliftment-and-empowerment-in-south-africas-fmcg-retail-sector (Accessed: 20 December 2024).

De Villiers, V., Van Der Colff, F., Stiehler-Mulder, B. and Mafuratidze, N. (2023) *Exploring a motivational approach to curb employee theft in FMCG retailing in South Africa*. Available at: https://content.henleysa.ac.za/exploring-a-motivational-approach-to-curb-employee-theft-in-fmcg-retailing-in-south-africa (Accessed: 20 December 2024).

Ebster, C. and Garaus, M. (2015) *Store design and visual merchandising: creating store spaces that encourages buying*. 2nd edn. New York, NY: Business Expert Press.

Emberson, C., Storey, J., Godsell, J. and Harrison, A. (2006) 'Managing the supply chain using in-store supplier employed merchandisers', *International Journal of Retail & Distribution Management*, 34(6), pp. 467-481. Available at: https://doi.org/10.1108/09590550610667056 (Accessed: 19 December 2024).

Galletta, A. (2013) *Mastering the semi-structured interview and beyond: from research design to analysis and publication*. New York, NY: New York University Press.

Gavin, M. (2020) '10 tips to help you boost team performance', *Harvard Business School Online Business Insights Blog*, 26 March. Available at: https://online.hbs.edu/blog/post/how-to-improve-team-performance (Accessed: 5 January 2025).

Ghorpade, J., Lackritz, J. and Singh, G. (2011) 'Personality as a moderator of the relationship between role conflict, role ambiguity, and burnout', *Journal of Applied Social Psychology*, 41(6), pp. 1275-1298. Available at: https://doi.org/10.1111/j.1559-1816.2011.00763.x (Accessed: 2 December 2024).

Hecht, L.M. (2001) 'Role conflict and role overload: different concepts, different consequences', *Sociological Inquiry*, 71(1), pp. 111-121. Available at: https://doi.org/10.1111/j.1475-682X.2001.tb00930.x (Accessed: 8 December 2024).

Hennink, M., Hutter, I. and Bailey, A. (2020) *Qualitative research methods*. 2nd edn. Los Angeles, CA: Sage.

Kahn, R.L., Wolfe, D.M., Quinn, R., Snoek, J.D. and Rosenthal, R.A. (1964) *Organizational stress: studies in role conflict and ambiguity*. New York, NY: Wiley.

Kettle, I.E. (2019) 'The importance of FMCG merchandising', *LinkedIn Pulse*, 4 February. Available at: https://www.linkedin.com/pulse/importance-fmcg-merchandising-ian-edward-kettle (Accessed: 14 January 2025).

King, L.A. and King, D.W. (1990) 'Role conflict and role ambiguity: a critical assessment of construct validity', *Psychological Bulletin*, 107(1), pp. 48-64. Available at: https://doi.org/10.1037/0033-2909.107.1.48 (Accessed: 18 December 2024).

Maden-Eyiusta, C. (2021) 'Role conflict, role ambiguity, and proactive behaviors: does flexible role orientation moderate the mediating impact of engagement?', *The International Journal of Human Resource Management*, 32(13), pp. 2829-2855. Available at: https://doi.org/10.1080/09585192.2019.1616590 (Accessed: 17 December 2024).

May, T. (ed.) (2002) *Qualitative research in action*. London: Sage.

MegaVision Media (2019) 'App for merchandisers', *Bizcommunity*, 7 November. Available at: https://www.bizcommunity.com/Article/196/305/197670.html (Accessed: 14 January 2025).

Meira, J.V.d.S. and Hancer, M. (2021) 'Using the social exchange theory to explore the employee-organization relationship in the hospitality industry', *International Journal of Contemporary Hospitality Management*, 33(2), pp. 670-692. Available at: https://doi.org/10.1108/IJCHM-06-2020-0538 (Accessed: 23 December 2024).

Meyer, J.-H., González, E.M. and Lopez-Lomelí, M.A. (2022) 'Better support for supportive jobs. How to improve brand performance through better compensation and training for in-store merchandisers', *Journal of Retailing and Consumer Services*, 64, p. 102750. Available at: https://doi.org/10.1016/j.jretconser.2021.102750 (Accessed: 13 January 2025).

Miles, R.H. and Perreault, W.D., Jr. (1976) 'Organizational role conflict: its antecedents and consequences', *Organizational Behavior and Human Performance*, 17(1), pp. 19-44. Available at: https://doi.org/10.1016/0030-5073(76)90051-9 (Accessed: 18 December 2024).

Mills, A.J., Durepos, G. and Wiebe, E. (2010) *Encyclopedia of case study research*. Thousand Oaks, CA: Sage.

Montani, F., Setti, I., Sommovigo, V., Courcy, F. and Giorgi, G. (2020) 'Who responds creatively to role conflict? Evidence for a curvilinear relationship mediated by cognitive adjustment at work and moderated by mindfulness', *Journal of Business and Psychology*, 35(5), pp. 621-641. Available at: https://doi.org/10.1007/s10869-019-09644-9 (Accessed: 23 December 2024).

Naeem, M., Ozuem, W., Howell, K. and Ranfagni, S. (2023) 'A step-by-step process of thematic analysis to develop a conceptual model in qualitative research', *International Journal of Qualitative Methods*, 22. Available at: https://doi.org/10.1177/16094069231205789 (Accessed: 1 January 2025).

Nerstad, C.G.L., Seljeseth, I.M., Richardsen, A.M., Cooper, C.L., Dewe, P.J. and O'Driscoll, M.P. (2023) *Organizational stress: a review and critique of theory, research, and applications*. 2nd edn. London: Sage.

NielsenIQ (2024) *NIQ Retail Barometer: South Africans spend R214 billion on FMCG and durable goods in Q3 2024* [Press release]. 21 November. Available at: https://nielseniq.com/global/en/news-center/2024/niq-retail-barometer-south-africans-spend-r214-billion-on-fmcg-and-durable-goods-in-q3-2024/ (Accessed: 13 January 2025).

O'Hara, C. (2014) 'Who's being left out on your team', *Harvard Business Review*, 27 August. Available at: https://hbr.org/2014/08/whos-being-left-out-on-your-team (Accessed: 23 December 2024).

Payi, X. (2023) 'Industry research: the FMCG story', *CGCSA Summit 2023*. Sandton, South Africa, 11 October 2023. Available at: https://www.cgcsa.co.za/Summit/Industry%20Research%20-The%20FMCG%20Story%20by%20Xhanti%20Payi,%20PWC.pptx (Accessed: 13 January 2025)

Pearce, J.L. (1981) 'Bringing some clarity to role ambiguity research', *The Academy of Management Review*, 6(4), pp. 665-674. Available at: https://doi.org/10.2307/257646 (Accessed: 18 December 2024).

Pickard, A.J. (2012) *Research methods in information*. 2nd edn. London: Facet.

Ristić, C. (2024) *Building quality relationships and resilient teams: organisations' secret weapon for weathering disruption?* [White paper]. Available at: https://content.henleysa.ac.za/building-quality-relationships-and-resilient-teams-candace-risti%C4%87-white-paper (Accessed: 3 January 2025).

Rizzo, J.R., House, R.J. and Lirtzman, S.I. (1970) 'Role conflict and ambiguity in complex organizations', *Administrative Science Quarterly*, 15(2), pp. 150-163. Available at: https://doi.org/10.2307/2391486 (Accessed: 2 December 2024).

Rogelberg, S.G. (ed.) (2007) *Encyclopedia of industrial and organizational psychology*. Thousand Oaks, California: Sage.

Rogelberg, S.G. (2017) *The Sage encyclopedia of industrial and organizational psychology*. 2nd edn. Thousand Oaks, CA: Sage.

Schaufeli, W.B. and Taris, T.W. (2014) 'A critical review of the job demands-resources model: implications for improving work and health', in G.F. Bauer and O. Hämmig (eds) *Bridging occupational, organizational and public health: a transdisciplinary approach*. Berlin: Springer Science and Business Media, pp. 43-68.

Schmidt, S., Roesler, U., Kusserow, T. and Rau, R. (2014) 'Uncertainty in the workplace: examining role ambiguity and role conflict, and their link to depression—a meta-analysis', *European Journal of Work and Organizational Psychology*, 23(1), pp. 91-106. Available at: https://doi.org/10.1080/1359432X.2012.711523 (Accessed: 8 December 2024).

Schuler, R.S., Aldag, R.J. and Brief, A.P. (1977) 'Role conflict and ambiguity: a scale analysis', *Organizational Behavior and Human Performance*, 20(1), pp. 111-128. Available at: https://doi.org/10.1016/0030-5073(77)90047-2 (Accessed: 2 December 2024).

Seppälä, E. and McNichols, N.K. (2022) 'The power of healthy relationships at work', *Harvard Business Review*, 21 June. Available at: https://hbr.org/2022/06/the-power-of-healthy-relationships-at-work (Accessed: 3 January 2025).

Smith, J.L. (2010) 'Valued employees get results', *Quality*, 49(8), pp. 14-15. Available at: https://www.proquest.com/scholarly-journals/valued-employees-get-results/docview/744029955/se-2 (Accessed: 23 December 2024).

Sonnentag, S. and Pundt, A. (2016) 'Leader-member exchange from a job-stress perspective', in T.N. Bauer and B. Erdogan (eds) *The Oxford handbook of leader-member exchange*. New York, NY: Oxford University Press, pp. 189-208.

Topps, J. and Taylor, G. (2018) *Managing the retail supply chain: merchandising strategies that increase sales and improve profitability*. London: Kogan Page.

Tracy, S.J. (2020) *Qualitative research methods: collecting evidence, crafting analysis, communicating impact*. 2nd edn. Hoboken, NJ: Wiley Blackwell.

Tshabangu, I., Ba', S. and Madondo, S.M. (2021) *Approaches and processes of social science research*. Hershey, PA: Information Science Reference.

Tubre, T.C. and Collins, J.M. (2000) 'Jackson and Schuler (1985) revisited: a meta-analysis of the relationships between role ambiguity, role conflict, and job performance', *Journal of Management*, 26(1), pp. 155-169. Available at: https://doi.org/10.1177/0149206300026000104 (Accessed: 20 December 2024).

Van der Merwe, B. (2024) 'Demystifying category management for small retailers operating in low data environments', *Bizcommunity*, 24 January. Available at: https://www.bizcommunity.com/article/demystifying-category-management-for-small-retailers-operating-in-low-data-environments-901834a (Accessed: 14 January 2025).

Varley, R. (2006) *Retail product management: buying and merchandising*. 2nd edn. London: Routledge.

Vieira, H. (2017) 'How to reduce burnout in the workplace', *London School of Economics blog*, 30 August. Available at: https://blogs.lse.ac.uk/businessreview/2017/08/30/how-to-reduce-burnout-in-the-workplace/ (Accessed: 5 January 2025).

Weiner, I.B. and Craighead, W.E. (2010) *The Corsini encyclopedia of psychology*. Volume 3. 4th edn. Hoboken, NJ: John Wiley & Sons.

Yin, R.K. (2011) *Qualitative research from start to finish*. New York, NY: Guilford Press.

Zenger, J. and Folkman, J. (2023) '7 Ways to make employees feel respected, according to research', *Harvard Business Review*, 7 June. Available at: https://hbr.org/2023/06/7-ways-to-make-employees-feel-respected-according-to-research (Accessed: 3 January 2025).

Annexures

Annexure A: interview guides

Interview guide – merchandisers

1. What do you see as your role in contributing to the satisfaction of customers?
2. What do you see as your role in contributing to the overall success of the store?
3. Considering the FMCG retail store where you work, what are the main challenges you face as a merchandiser? (Prompt: role conflict, sense of recognition and inclusion, evaluation of their performance and well-being, etc.)
4. How do these challenges stand in your way when trying to create a customer-friendly environment?
5. What support do you currently receive from your line manager and more senior managers in the retail store to make your work easier and more enjoyable?
6. How do you perceive the level of communication and collaboration between you and your store managers in addressing challenges?
7. Can you share any examples of where you received support or information from the retail store to make your work more meaningful?
8. What more could be done by your managers at the FMCG retail store to help address the challenges you face when doing your work?
9. What resources or tools do you believe would help you better address the challenges you face as a merchandiser?
10. What suggestions do you have for improving the working conditions and support for merchandisers in retail stores?

Interview guide – managers

1. What role do you think merchandisers play in contributing to the satisfaction of customers?

2. What role do you think merchandisers play in contributing to the overall success of the store?

3. What do you believe are the primary challenges faced by merchandisers in retail stores? (Prompt: role conflict, sense of recognition and inclusion, evaluation of their performance and well-being, etc.)

4. How do these challenges impact the customer experience in the store?

5. Do you think that these challenges impact the overall success of the store?

6. Are there any strategies or initiatives in place at the store to address the challenges faced by merchandisers?

7. Can you provide examples of successful interventions or support mechanisms that have helped alleviate challenges for merchandisers in your store?

8. Do you believe that the level of communication and collaboration between merchandisers and their line managers in the store are sufficient?

9. What do you believe could be done by line managers and senior managers at FMCG retail stores to assist merchandisers with the challenges facing them?

10. Do you have any recommendations for improving the working conditions and support for merchandisers in retail stores?

Annexure B: participant information sheet

Information sheet

The merchandiser's challenge – working for many bosses

Invitation paragraph

You are being invited to take part in a research project because you are regarded an important stakeholder of this research project. Before you decide, it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Ask us if there is anything that is unclear or if you would like more information.

What is the purpose of the project?

The primary objective of this study is to investigate the challenges faced by merchandisers employed in FMCG retail stores and to provide recommendations to overcome these challenges.

Why have I been chosen?

You have been chosen because your experience in retail will provide valuable insight into the challenges faced by merchandisers employed in FMCG retail stores.

Do I have to take part?

It is up to you to decide whether or not to take part. If you do decide to take part, you will be given this information sheet to keep (and be asked to sign a consent form). You can withdraw at any point until the end of the interview. You do not have to give a reason in the case of a withdrawal. You can contact the researcher at any time to ask questions about participation. All the data you provide will be held securely and treated confidentially (see below).

What do I have to do?

This interview might last one hour and will involve a natural conversation about the challenges faced by merchandisers employed in FMCG retail stores. Interviews will be recorded only for use by the research team and, together with the transcriptions, will be kept

in a secure place and deleted once the project is completed. Privacy and confidentiality will be rigorously maintained and neither you nor your organisation will be named in any research outputs, including any information that might reveal your identity or that of the organisation (see below).

Will I be recorded and how will the recorded media be used?

With your permission, interviews will be recorded and then transcribed as a way to accurately present findings and main themes that emerge from our conversation. Material collected will only be used for the purpose of transcribing, summarising, and making sense of the data by the research team. Data collected will be destroyed within three years of the project's end. The audio recordings of your activities made during this research will be used only for analysis, with transcribed direct quotes used for illustration in analysis and results section of the white paper and reports. No other use will be made of data without your written permission, and no one outside the research team involved in the project will be allowed access to the original recordings (see below).

What are the possible disadvantages and risks of taking part?

There are no reasonably foreseeable discomforts, disadvantages, or risks to participation.

What are the possible benefits of taking part?

You will play an important part in creating an understanding of the challenges faced by merchandisers and providing recommendations to overcome these challenges.

Will my taking part in this project be kept confidential?

All the information that we collect from you during the course of the research will be kept strictly confidential. You will not be able to be identified in any reports or publications.

What type of information will be sought from me and why is the collection of this information relevant for achieving the research project's objectives?

The data collected is important in achieving the research objectives, as it offers the possibility to understand your experiences and understandings in detail. This project has been reviewed by the University Research Ethics Committee and has been given a favourable ethical opinion

for conduct. You will be given a copy of the information sheet and a signed consent form to keep.

42

Thank you for taking the time to read through the information.

For further information, contact:

Prof. Danie Petzer (Henley Business School Africa) daniep@henleysa.ac.za

Mr Frans van der Colff (Henley Business School Africa) frans@henleysa.ac.za

Ms Vickey de Villiers (Henley Business School Africa) vickeyv@henleysa.ac.za

42

Consent form

1. I have read and had explained to me by

   ....

   the accompanying information sheet relating to the project on: The Merchandiser's challenge.

2. I have had explained to me the purpose of the project and what will be required of me, and any questions I have had have been answered to my satisfaction. I agree to the arrangements described in the information sheet in so far as they relate to my participation.

3. I understand that participation is entirely voluntary and that I have the right to withdraw from the project any time, and that this will be without detriment.

4. This project has been reviewed by the University Research Ethics Committee and has been given a favourable ethical opinion for conduct.

5. I have received a copy of this consent form and the accompanying information sheet.

   Name and surname: _____

   Date of birth: _____

   Signature: _____

   Date: _____