

MAJOR RESEARCH PROJECT REPORT

On

A STUDY ON VISUAL MERCHANDISING OF KIRANA STORES IN INDIA

Submitted By:

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DECLARATION

I, Nishant Bagri, a student of the Master of Business Administration (MBA) program at Delhi School of Management, Delhi Technological University (DTU), hereby declare that this Major Research Project titled “A Study On Visual Merchandising Of Kirana Stores In India” is an authentic record of my own work carried out during the final semester. The research presented in this report is the result of my independent investigation, except where otherwise stated.

I confirm that this report represents my own original work and is free from any plagiarism. Any external sources, publications, or individuals consulted during the research process have been appropriately cited and referenced. I further affirm that this report has not been submitted, in part or in full, for any other degree or qualification in this or any other university or institution.

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CERTIFICATE

This is to certify that Nishant Bagri, enrolled as 2K22/DMBA/87, has submitted the major research project titled 'A Study On Visual Merchandising Of Kirana Stores In India' as part of the prerequisites for obtaining the Master of Business Administration (MBA) degree from Delhi School of Management, Delhi Technological University.

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EXECUTIVE SUMMARY

The goal of this study is to offer a conceptual framework for the use of visual merchandising in Indian Kirana stores. One essential element of retail brand promotions is visual merchandising. Understanding the current situation of visual merchandising at Kirana Stores is made easier with the help of this study.

For this research, a qualitative analysis of more than 250 Kirana Store images from Tier II and Tier III Indian cities was conducted. The project aims to investigate the many aspects of visual merchandising at Kirana Stores using a visual ethnographic study that makes use of Google Maps data. It also proposes a conceptual framework for potential future applications.

The conceptual framework addresses the issues of product placement techniques, placement of branding collateral, and types of visual merchandising strategies to employ.

Keywords: branding, retail, Kirana Stores, visual merchandising, rural India

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Chapter: Introduction

For a business to succeed in the Indian market, developing a rurally relevant brand is essential. The majority of Indians—roughly 70%—live in rural areas. The Kirana Stores are far more suited to meet the everyday needs of residents in rural cities than retail supermarkets. Although they are a component of the unorganized retail sector in India, Kirana Stores are still accessible. For many years, well-known producers like Dabur and HUL have sold their goods through Kirana Stores. But those brands have long since figured out the retail code. Startups must learn how to win over Indian hearts as they flourish in the nation's expanding economy.

In this study, we use visual merchandisers' perspective to examine Kirana businesses' branding. The art of visual merchandising involves positioning signs, merchandise, and other in-store components to best appeal to the intended customer base. For a long time, Kirana Stores have been local celebrities. When we examine them through the lens of visual merchandise, we may learn more about the owner's mindset, regional preferences, and the placement of brands inside the visual story. This study aims to provide a conceptual foundation for companies and start-ups that wish to succeed in the Kirana market by assessing the current status of visual merchandising.

1.1 Background

Indian Retail Industry A report released by the Retailers Association of India and premier consulting firm BCG projects that the retail sector would expand at a rate of 10% annually over the next ten years, reaching \$2 trillion.

The following traits define the retail environment:

- Reducing the distinctions between online and offline
- Innovative Revenue Models: Purchase Now, Pay Later
- Extreme rivalry Individualization
- Put Experience Marketing First

India's home consumption is projected by BCG to reach 130 trillion dollars in 2021, notwithstanding the obstacles presented by COVID-19. Fuelling this consumption are:

-

- An increase in household income Information accessibility Changes in behaviour, such as buying around-the-clock
- overall propensity to spend more

In March 2022, the Consumer Confidence Index, as reported by the RBI, was 71.7, indicating a return to normalcy compared to the pre-pandemic level of 70 in 2019.

Even before the arrival of the biggest online retailers, the disorganized state of the Indian retail industry has been upended by modern retail forms. India's shopping habits have been significantly impacted by the emergence of supermarkets and 24-hour convenience stores. Nonetheless, this pattern is what makes Indian urban or metropolises unique. As a result, the unorganized sector continues to dominate Tier II and Tier III cities. The graph below attests to the same thing:

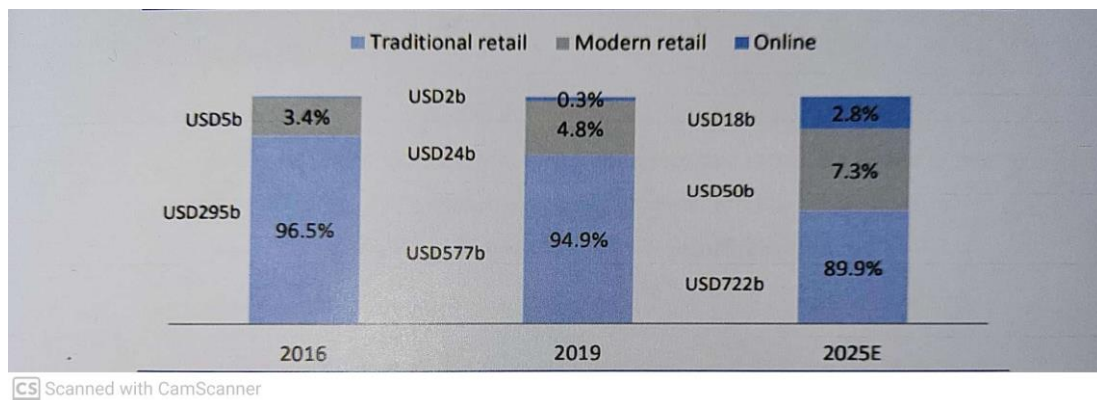


Fig.1.1 Composition of retail sector, Source Red Seer Report

Changes in Consumer Behavior in the Retail Sector

The burgeoning patterns in consumer behavior are as follows:

1. An interest in leading a healthy life

Concern over consuming products after learning about their calorie content is on the rise. This worry has become more prevalent and a household concern with the emergence of applications like HealthifyMe.

2. Growing Number of Millennials Purchasing

The customer, who was born twenty years ago, is currently seeking employment, considering marriage, and developing into a mature adult. The consumer of millennials is tech-savvy, enjoys questioning the existing quo, and is open to new ideas.

3. Privacy Concern

The modern customer is conscious of the ways in which personal data is gathered from them and used to target advertisements. As technology advances and public awareness of privacy issues grows,

4. A fan of convenience

Consumers enjoy home shopping convenience and lightning-fast deliveries. Both the quantity of midnight consumers and the retailers catering to them is rising. Convenience with return policies and refunds is also a key consideration when selecting an offline retailer or shopping site.

5. Customized Buying Process

Whether or not a customer makes large purchases, there is a growing expectation on the part of the customer for the store to retain their selections. This is a new trend for retailers that previously provided generic experiences; they now need to meet the demands of the modern consumer..

1.1.1 Challenges in the Retail Industry

1. Laws being tightened

The retail industry is regulated by legislation pertaining to gig workers, privacy protection, revised minimum wage rules, FDI in multi-brand retail, and GST.

2. Establishment of Infrastructure

The retail industry nevertheless faces challenges due to a lack of consistent infrastructure to support its growth, particularly in rural areas, despite an increase in developments.

3. Fake Goods

Since the emergence of e-commerce, it has grown more challenging to identify genuine goods. For some, this has resulted in a decline in brand value, while for others, return rates are significant.

4. Workplace Concerns

Finding skilled labor has grown more competitive, particularly for blue-collar workers. The shift in gig workers to food delivery firms has increased negotiation competition.

1.1.2 Visual Merchandising

"It is your imagination that needs to be stimulated. Once that happens, the rest is easy. The merchandise is always the leader."

-Joe Cotugno, Creative Director. Bloomingdale's

Have you ever liked the mannequin's display when you were outside a retail store? Even if it was your first time at the store, proceed inside and buy the exact same dress that was on display outside as a next step. This is how the idea of visual merchandising has affected everything. The skill of arranging and showcasing merchandise in a retail setting so as to pique clients' interest and persuade them to make impulsive purchases is known as visual merchandising. If done correctly, the attraction can convert a passive buyer to an active buyer.

Visual merchandising has evolved over time to incorporate components pertaining to store exteriors as well as interiors. Store owners should focus on the lighting, mannequins, window displays, entry, and signage when it comes to their external storefronts. The store layout, product placements, shelf designs, fixtures and fittings, color schemes, aisles, background music, lighting, atmosphere, product promotions, loyalty programs, endcap displays, and checkout counters are important aspects of the interior design to take note of. Visual merchandising has grown in importance in today's retail environment. The fundamental component of this exercise is understanding the consumer, even though its components vary depending on the kind of store. In particular, visual merchandising has changed significantly throughout time, especially in relation to Kirana stores in India.

In the past, Kirana store owners would set out product placements in their businesses based on how best to serve their patrons. To draw in the children, they also displayed displays of candies and toffees on the front counters. Activities related to branding gained popularity over time. Subsequently, the well-known brands in every category were arranged and prominently placed on the shelves. Then, see-through glass counters were installed in place of the front counters. The things on exhibit within them were clearly visible to customers. The period of visually appealing containers based on brands for Kirana store displays followed. Maggi, for instance, gave retailers big nets to use as displays up front, holding the maggi packets. In a similar vein, Vicks gave store owners hanging compartments.. In this case, the design of the compartments took into account the sizes of different Vicks products. Later, hoardings and banners also gained popularity as a kind of visual merchandising. Coca-Cola gave store owners

personalized banners including their names, the Coca-Cola branding name, a color scheme, and an image of actors and actresses from their commercials. Large companies such as HULU have also recently begun to buy shelf space where they rotate a monthly assortment of products. Their emphasis is usually on showcasing their popular items, such as Lux soup and Red Label tea, in rural areas.

In summary, visual merchandising activities have a significant role in driving up sales of branded products, which in turn drives up sales at the local Kirana stores.

1.1.3 Impact of Visual Merchandising

Often when people go shopping, they think they are purchasing goods, but in reality, what they are purchasing is the shopping experience. People's reactions and purchasing power can be greatly influenced by the way products are presented and promoted. Retailers who display their items in an appealing, approachable, and appealing manner can boost sales and profit margins. A few effects of visual merchandising include

1.1.4 A Coverage that is comprehensive

Promoting a brand widely is a key element in achieving success in sales. Visual merchandising includes advertising, store design, window displays, and product placement and presentation. By using a unified visual theme throughout all of these circumstances, store managers can boost client awareness of the product and the possibility that he or she will purchase it. It is impossible to exaggerate the significance of repetition in helping the brain encode information. A recurring theme for the product is displayed in the storefront window, inside displays, and on the product package itself to produce a message that is both persuasive and appealing.

1.1.5 Marketing for the Seasons

Strong visual components have developed for many holidays, acting as indications of consumption. The vivid yellows and reds of Diwali, the blue hues and endearing creatures of Easter, the multitude of colors of Holi, and the cozy, family-oriented symbols of Christmas all resonate in the minds of customers because they have been exposed to them every year of their lives. Visual merchandising can benefit from this familiarity by advertising suitable products at the right time of year and establishing a connection between visual cues and consumers' open minds.

1.1.6 Staging

Presenting something in a way that is aesthetically pleasant is the art of staging. To improve the aesthetics of an indoor exhibit, this is frequently accomplished physically by adding additional lighting. Television commercials, where objects are idealized to perfection in a way that does not exist in reality, are the most notable examples of staging. The most typical usage of staging is for expensive purchases, such as jewelry or cars. Staging is positively received by customers who place equal emphasis on the shopping experience and the merchandise since it makes them happier while making a purchase.

1.1.7 Novelty

While recurring themes and cues are essential for getting customers to make a purchase, it's also advantageous to keep the shopping environment feeling new. Customers who frequent a place will be drawn in by new offerings or arrangements. Even if a business offers the same products but updates its layout design, many customers will react with renewed enthusiasm. When new products are introduced, they ought to be emphasized by being prominently displayed in front of the store. Sales will rise because customers won't be able to miss them when they enter the store.

1.2 Problem Statement

It is imperative that visual merchandisers be used in brand promotions. For the past few decades, this approach has been effectively used in India by major FMCG companies like Hindustan Unilever, Dabur, Nestle, and others. However, it is still unexplored ground for startups and new businesses. Furthermore, the majority of studies conducted on this topic concentrate on supermarket visual merchandising.

This begs the urgent question of why existing and emerging brands aren't taking advantage of the chance to establish a brand for India, given that over 70% of Indians reside in rural areas. Furthermore, no research has been done to far on the topic of visual merchandising in India's Tier II and Tier III cities.

This is the foundation for the research's issue statement, which attempts to propose a conceptual framework for the subject and identify trends in the visual merchandising that businesses in Tier II and Tier III cities of India are now undertaking.

1.3 Objectives

The following are the main goals that the study paper aims to accomplish:

- To give a thematic analysis of the visual merchandising strategies that are currently being used by companies in Tier II and Tier III cities' Kirana stores.

- To put forth a conceptual framework that synthesizes the thematic understanding and serves as an easily accessible resource for businesses and scholars that are eager to examine this subject. The following are the main goals that the study paper aims to accomplish:

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- To put forth a conceptual framework that synthesizes the thematic understanding and serves as an easily accessible resource for businesses and scholars that are eager to examine this subject.

1.4 Scope of this Study

This study's focus is restricted to Kirana Stores in Tier II and Tier III Indian cities. Moreover, other aspects like product development tailored to the needs of rural communities and the marketing of rural events are not considered in this study, which concentrates on visual merchandising as a method of brand promotion. The results of this research are generalizable to all rural states of India.

The following are the main goals that the study paper aims to accomplish:

To present a thematic study of the visual merchandising tactics now employed by businesses in the Kirana stores of Tier II and Tier III cities.

- To put forth a conceptual framework that synthesizes the thematic understanding and serves as an easily accessible resource for businesses and scholars that are eager to examine this subject. To present a thematic study of the visual merchandising tactics now employed by businesses in the Kirana stores of Tier II and Tier III cities.

- To present a conceptual framework that summarizes the thematic understanding and can be readily accessed by scholars and corporations interested in researching this topic.

CHAPTER 2: LITERATURE REVIEW

2.1 Branding

A "name, term, sign, symbol, or design, or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition," is what the American Marketing Association (AMA) defines as a brand. Given that they contain a mix of these components, it follows that the majority of the goods and services we use on a daily basis are brands. As to David Ogilvy, a brand is "the intangible sum of a product's attributes: its name, packaging, and price, its history, its reputation, and the way it's advertised."

While this may be true for some, but the concept of branding has evolved a lot overtime. These days, it's considered a way to establish recognition, credibility, and awareness in the industry. "People, visuals, culture, perception, words, messages, PR, opinions, news media, and especially social media create and influence a brand," claims Lisa Buyer. Over time, it is nourished, grown, and regenerated. In a similar vein, branding is defined by Heidi Cohen as succinct marketing messaging that forge strong emotional connections with customers. Customers then develop a perceived value as a result of this.

2.1.1 History of Branding

Even though the idea of branding is always changing, its roots go back hundreds of years. Adrian Room explains how this concept was extremely important in the early Greek and Roman civilizations in his research "History of Branding" (1998). He describes how Romans branded and marketed their goods using names and visual representations. For example, a butcher would display an image of hams to indicate the purpose of the store. Refer to figure 1.



Fig 2.1 Early methods of Branding, Source: Research on History of Branding

Wilson Bastos and Sidney J. Levy (2012) claim that branding is a sign and symbol that originates from the need to establish one's identity and gain recognition. Their work

"A history of the concept of branding: practice and theory" discusses the inception of the idea and its historical development. They emphasized that there have historically been unfavorable associations with branding, particularly with regard to the branding of captives, slaves, and animals. The brand was thought to be better than the brand. Moreover, throughout the 20th century, branding became a crucial component of marketing. In addition to sales and promotion, trademarks evolved into synonymous with brands at that point of time. And today, it has become essential that branding exercise is interdisciplinary.

2.1.2. Elements of Branding

Features that characterize a product and set it apart from competitors are referred to as brand components. These can be a name, term, sign, symbol, or design, under the AMA definition. These components are crucial for creating a strong brand, as noted by Mosarrat Farhana in her research "Brand Elements Lead to Brand Equity: Differentiate or Die". The author claims that these components aid in the development of distinct and favorable brand associations in addition to raising brand awareness.

Brand Name is the first and most crucial component of a brand. It serves as the fundamental foundation for the brand's equity. For the intended audience, it's more than just a term. If successful, it will quickly become ingrained in their memories. Additionally, the brand name should be significant, distinctive, easy to say, understand, and spell, according to Robertson and Keller. For example, Closeup toothpaste and Head & Shoulders shampoo.

Symbols and Logos are the next two important components. Customers will be able to connect these images with the brand. These visual aids can be used to accomplish both branding objectives, namely identification and differentiation. While some logos just display the brand names, others highlight the purpose of the company. McDonald's logo is a fantastic illustration of a well-designed logo. Children, who aren't even literate, can recognize it from a distance.

Characters are an additional fascinating component. Certain corporations associate their brands with animated characters, cartoons, or animals. Popular characters in India have been employed by Amul and Indian Railways. As soon as people see these characters, they know which brand it is.

Other elements mentioned in the research are packaging, slogan, colors and jingles.

2.1.3 Importance of Branding

In his study paper "Branding: a trend for today and tomorrow" (1995), Joseph Arthur Rooney emphasizes the value of branding for businesses and the difficulties that may arise while developing a strategy. A successful branding campaign depends on selecting the appropriate name, running effective ads, and utilizing pertinent tactics.

As technology advances and the globe grows increasingly interconnected and evolved, branding is also evolving. This changing facet of branding is the subject of Vanitha Swaminathan, Alina Sorescu, et al.'s research paper "Branding in a Hyperconnected World Refocusing Theories and Rethinking Boundaries" (2020). They draw attention to the reality that branding is now a two-way channel that is the result of shared ownership among all brand stakeholders. The current state of branding encompasses not only the process of branding a good or service, but also the branding of concepts, individuals, and media.

2.1.4 The Rural India

As per the definition provided by the Indian census, a rural area is "any habitation with a population density of less than 400 per sq. km., where at least 75 percent of the male working population is involved in agriculture, and where no municipality or board exists." Of the approximately 6.4 lakh villages in India, fewer than 20,000 have a population of five thousand or more. Most fast-moving consumer goods (FMCG) companies define a rural market as any area with less than 2,000 residents.

According to the 2011 census, 162 million households make up nearly 70% of India's total population. Over 60% of India's income is generated by the country's rural, small-town, and semi-urban economies, according to the Rural Marketing Association of India (RMAI). Furthermore, the Technopak report pointed out that the rural market is developing at a rate of 15% due to increased demand for FMCGs, pharmaceuticals, auto components, and other items.

The population, growing rural income, evolving lifestyles and demands, life cycle advantages, and other factors all impact how broad rural marketing can be. Aside from that, companies are trying to go into underserved markets, meet the increasing need for long-term organizational activities, and enhance their brand image through CSR initiatives. Companies have begun reconsidering their business strategies and focusing more on social than on commercial goals.

A recent Nielsen study indicates that the use of branded consumer goods has increased in rural areas. In the quarter that concluded in September 2021, the consumption of FMCG products in rural areas rose by 58% on an annual basis. In addition, a sizable amount of rural income comes from non-farm sectors. Growing rural consumption combined with rising non-farm sector income is helping a lot of businesses. States where agriculture plays a significant role, like Punjab, Haryana, and others, are where this growth story is most evident.

2.1.5 Visual Merchandising Whether a product or brand is viewed "appropriately" by the consumer and influences a positive behavioral or psychological reaction that results in a purchase is the subject of visual merchandising (Kerfoot, Davies & Ward, 2003). Webster & Garaus (2011) define visual merchandising as the art and science of arranging products to be as aesthetically pleasing as possible while highlighting customer interaction with graphics and presentations. According to Law, Wong, and Yip (2012), visual merchandising is a technique for using distinctive visual styles and themes to communicate a message about products to buyers.

Mehta and Chugan (2012) looked at the effect of visual merchandising on consumers' impulsive buying behavior. His research revealed a clear correlation between window décor and impulsive purchases. Nonetheless, there is a high correlation between floor merchandising and spontaneous purchases, even though there is no discernible relationship between form display and impulse buying.

Theodoridis & Chatzipanagiotou (2009) state that a variety of visual components from the actual store environment, such as colors and decoration elements, are combined to create the atmosphere of the store setting. Consequently, they identify characteristics that impact consumers' behavior and refer to these as visual merchandising elements, thus incorporating visual merchandising into their assessment of the store's atmosphere. Pajuodis (2005) takes into account references, paintings, photographs, signage, and other parts of the visual atmosphere. The retail environment is comprised of ambient variables (such as lighting, fragrance, and music), design aspects (such as layout and assortment), and social factors (Mohan, Sivakumaran, and Sharma 2013).

Thus, by reading these authors, one can observe that merchandising, shop design, and atmosphere are all factors that impact the retail environment; yet, one can distinguish visual features of these traits that may be combined to form visual merchandising.

2.1.6 Kirana Stores

The importance of a Kirana Store in the COVID age was noted in a 2020 Accenture report on the transition of Kirana Stores. The paper highlights the potential of a local Kirana store as an information powerhouse. An owner of a Kirana Store can recall the preferences of its patrons despite relying on human memory. They also make arrangements for festive needs quite quickly. The report talks about the importance of transformation in store layout in a manner that 75% of store space is dedicated to sales, 10% to office space and 15% for storage. It emphasizes on the need to incorporate retail best practices by Kirana Stores. For example, classifying things according to their impulse, convenience, etc., can help modernize According to Sinha et al. (2015), almost 75% of Kirana stores in India are less than 500 square feet. The study made note of how much more variety a Kirana Store has than a mom-and-pop shop. Most of the products offered by Kirana Stores are well-known national and regional brands, with an inventory of between 1000 and 8000 Stock Keeping Units (SKUs). To lower stocking needs and increase return on investment, top brands provide three-day servicing for the Kirana Stores. The study looked at how online shopping and Kirana Stores may work together. It implied that Kirana stores might end up serving as locations for customers to pick up.

The livelihoods of Kirana Store Owners are threatened by organized merchants who are quickly entering the grocery business. On the other side, value-conscious consumers drive market participants to operate on thin profit margins. Retailers who have hitherto focused only on supply-side efficiencies now need to incorporate demand-side efficacy in order to enhance corporate success, as Sanghvi (2007) accurately notes.

2.2 Retail Branding

Store brands are of importance to industrial institutional economics and marketers because they entail competition between manufacturers and retailers as well as among retailers themselves, according to Scott-Morton and Zettelmeyer (2004). This is mentioned in the preface to a Review of Industrial Organization special issue that is devoted to retail brands. A significant amount of the current research on retail brands is based on these horizontal and vertical features, which also make it possible to apply a simple stakeholder (consumer, retailer, supplier) paradigm to earlier studies. Store brands are of importance to industrial institutional economics as well as marketers, according to Scott-Morton and Zettelmeyer (2004), because they involve concerns of competition between producers and retailers as well as among retailers themselves.

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A 2004 Journal of Retailing special edition examined the evolving notion of the retail brand as more than merely a product brand. Ailawadi and Keller (2004) acknowledge in their position paper that branding in business is a broader concept. Recognizing that retailer brands are significantly more multisensory than product brands, they focus on the relationship between retail image and product brand. They argue that the basis of retail brand equity is consumer perceptions of the retailer rather than the private brand, which is confined to a little but noteworthy portion of the retailer's brand portfolio.

There is an easy logic to this point of view. It suggests that consumers trust these product lines because they are increasingly treating fragmented private brand ranges as an alternative brand (rather than an alternative product) to the manufacturers' brand on offer. Customers are able to recognize their preferences and save money on searches because to branding. Consequently, the retail brand name and the retail setting in which it is offered most likely aid in recognition and identification and convey a degree of assurance that promotes repeat business.

Steiner (2004), citing Braithwaite's work from the late 1920s, provides an interesting historical framework for private and national brand competition. She discovered that advertising and reputation drove the price differential between highly marketed national brands, unmarketed national brands, and private labels more so than quality. Despite being less costly, private brands "do not eliminate reputation entirely as a marketing component, as one of the mechanisms by which they are able to achieve volume and velocity of turnover is their enormous store's reputation" (Braithwaite, 1928 in Steiner, 2004).

Numerous scholars have examined the relationship between retail brands and store image as the idea of retail brands has expanded to include the shop as well as the product; nevertheless, as Jacoby and Mazursky (1984) note, the relationships between brands and store image are complex and multilayered. For some, the product brand enhances the store image, whereas for others, the store image influences the product brand. Store image was a significant factor in determining store brand quality, perceptions of the physical environment, merchandise, and service quality were significant cues in evaluating store brands, and store artistry contributed to the formation of store brand quality perceptions, according to a number of papers released in the mid-1990s from the Dick et al. (1995) research. Richardson and associates, 1996a.

We now enter the world of corporate branding as a result of this development of the retail brand concept. In yet another attempt to elucidate the factors that contribute to customer satisfaction and loyalty in retailing, Martenson (2007) defines corporate identity as shop image. She came to the conclusion that, for customers, the store's brand is the most important factor and that "retailers must be competent at retailing," but she also raises an important point about how comprehensive retail branding is. "It is expected that a consistent appearance and feel that matches the corporate brand's principles will have a favorable impact on store brands bearing the corporate name."

2.2.1 India's Rural Communities' Branding

The majority of the big brands are finding it more appealing to expand into India's rural marketplaces. Consumer behavior in these sectors has altered significantly since the green revolution and the widespread use of television and the internet. As a result, rural markets are now considered to be a crucial component of branding and marketing strategy. The "Modern Rural Marketing Network" (2015) study by Piali Haldar details how merchants and manufacturers have led the way in the transformation of rural markets. The author employs case studies of enterprises such as "Warana Bazar, ITC Choupal Sagar, Godrej Aadhaar, DCSL Hariyali Bazaar, and Mahindra & Mahindra's Subh Labh" to demonstrate how these early movers penetrated the Indian rural market using exploratory research.

The phenomenon of "rural retailing" has also been emphasized by Dr. Ashish Gupta in his research, "Rural Retail Revolution: The Rise of Rural Market". The study examined the significance of rural merchants and discussed the potential and problems faced by this industry within this framework. It is a reality that approximately thirty-

five percent of purchasing decisions are made by rural shopkeepers. When you consider that over 55% of Indians still reside in rural regions, this creates a significant potential. The traditional outlook, vast and dispersed areas, low living standards, low income and literacy rates, a variety of languages and dialects, a lack of infrastructure, and an economy dependent on agriculture are just a few of the difficulties mentioned in this study..

The study conducted by Sandeep Anand and Rajneesh Krishna on the subject of "Rural Brand Preference Determinants in India" centered on consumer preferences in order to gain a deeper understanding of this market. Regression analysis was used after a survey with over 350 respondents in two Indian states was completed. The study's findings demonstrated that businesses must position themselves as high-quality and value-for-money brands in order to increase their market share in rural areas, especially in the FMCG industry. Additionally, they must cultivate a relationship with the customers that fosters a feeling of community.

In addition to agriculture products like seeds and fertilizer, rural markets offer FMCG products a plethora of opportunities. In this sector, the rural market has expanded over time to surpass the size of the metropolitan ones. This feature of rural branding is the subject of a study conducted by Prof. (Dr. S. L. Gupta and Arun Mittal) titled "A Study of Consumer Behavior Aspects and Brand Preferences in Rural India with Reference to FMCG Sector". It emphasized how important it is to have a thoughtful, well-planned communication effort for branding. It fosters brand loyalty in addition to raising top of mind recall value. The correlation between family values and brand identity is another significant issue that is being addressed here.

CHAPTER 3: RESEARCH METHODOLOGY

3.1 Exploratory Research Design

This study is an exploratory one. When there is no prior research on the subject, gathering data is challenging, and the goal of the study is to lay the groundwork for more in-depth investigations, exploratory research is appropriate. This research paper is an exploratory study in this sector because there hasn't been much research done on Kirana Stores in Tier II and Tier III cities.

3.1.1 Qualitative in the Environment

This study report uses qualitative research as its research approach. According to Naresh Malhotra's well-known book Marketing Research, qualitative research is "an unstructured, exploratory research methodology based on small samples that provides insights and understanding of the problem setting." Non-quantifiable facts are evaluated as part of qualitative research. In order to conduct this study, images of Kirana Stores got from Google Maps are analysed.

3.1.2 Using Inductive Reasoning as a Basis

This study falls under the qualitative research category and is based on inductive reasoning. The research process in inductive reasoning moves from unique to generalizable ideas. Thus, a broad conclusion is derived from several individual observations. Based on inductive reasoning, this study is classified as qualitative research. Inductive reasoning research moves from original to broadly applicable concepts. Thus, from a number of discrete observations, a general conclusion is drawn.

3.1.3 Visual Ethnography Technique

John Creswell in his book "Qualitative Inquiry & Research Design: Choosing Among Five Approaches" discusses five methods of conducting Qualitative

Research:

1. Narrative
2. Phenomenological
3. Grounded Theory

4. Ethnography

5. Case Study

Ethnography is the method of choice for this study. As stated by Hammersley and Atkinson (2007) and Fetterman (2010), "ethnographic research takes a cultural lens to the study of people's lives within their communities". The goal of the study is a good fit for ethnography's non-interfering methodology and the culturally pertinent insights it produces.

This study is being conducted using a particular method called visual ethnography. The method is characterized as a "invitation to engage with images, technologies, and ways of seeing and experiencing as part of the ethnographic process" by Sarah Pink in her book *Doing Visual Ethnography*. Visual ethnography is the study of images in their original context, unaltered by outside influences. Images that the owner of the Kirana business self-uploaded to Google Maps were used for this investigation..

3.1.3.1 Thematic Analysis

The photos and information extracted from them will be examined by a Thematic Analysis, which will look for recurring themes in the data set.

3.1.3.2 Framework-Based Analysis

The Framework Method is used to investigate the discovered topics. "The Framework Method is an excellent tool for supporting thematic (qualitative content) analysis because it provides a systematic model for managing and mapping the data." According to the findings of Nicola K. Gale et al.'s 2013 research.

3.1.3.3 Subject Matter Expert Validation

A Subject Matter Expert approved the research findings to guarantee their authenticity and applicability. Two Kirana Shop owners from Delhi, India, who participated in the research have attested to the results and given their approval for their application.

3.1.3.4 Interview-based Validation

Twelve participants from Tier II and Tier III cities were also contacted for phone interviews. The purpose of the interview was to obtain recommendations and validate the themes identified.

3.1.4 Developing a Conceptual Framework

Based on the themes discovered, a conceptual framework that summarizes the key findings of the study is developed. This conceptual framework has applications in the visual merchandising and brand development of Kirana Stores. An outline of the Research Framework is provided below: Using visual ethnography for exploratory qualitative research, collecting pictures of Kirana Stores from Google Maps in Tier II and Tier III Indian cities, identifying themes and validating them through interviews and subject matter experts Establishing a Conceptual Structure

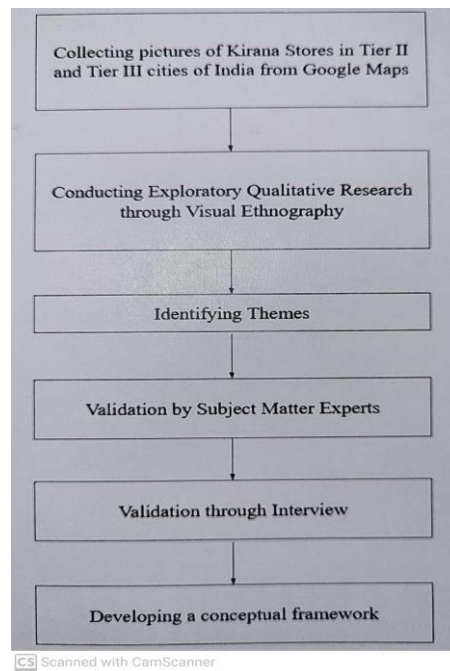


Fig 3.1 Research Framework, Source: Own Analysis

CHAPTER 4: ANALYSIS, FINDINGS AND RECOMMENDATIONS

4.1 Data Collection

The research used Google Maps as its data source. This investigation has involved taking 256 pictures of Kirana Stores. The time frame for this study is February 2024–April 2024.

Geographic research commonly uses the stratified random sample method, which was applied in this study. Six cities each from the North, East, West, and South strata of a sample of 24 cities have been examined.

The picture below illustrates the method used to gather the data:

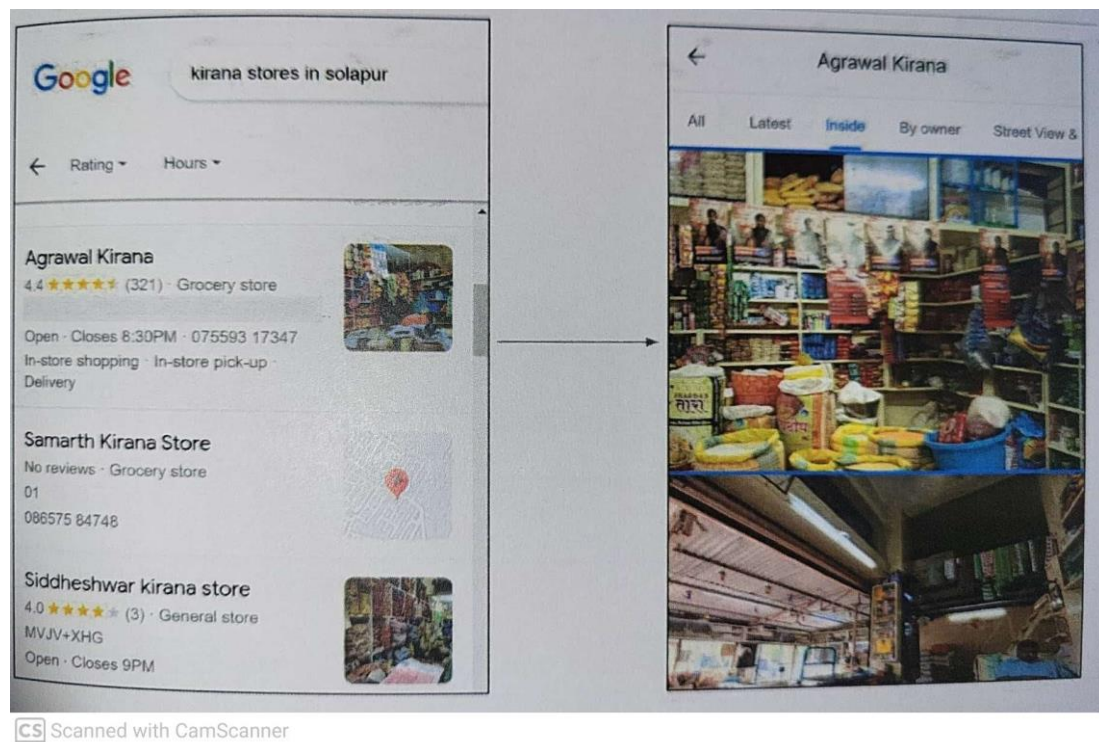
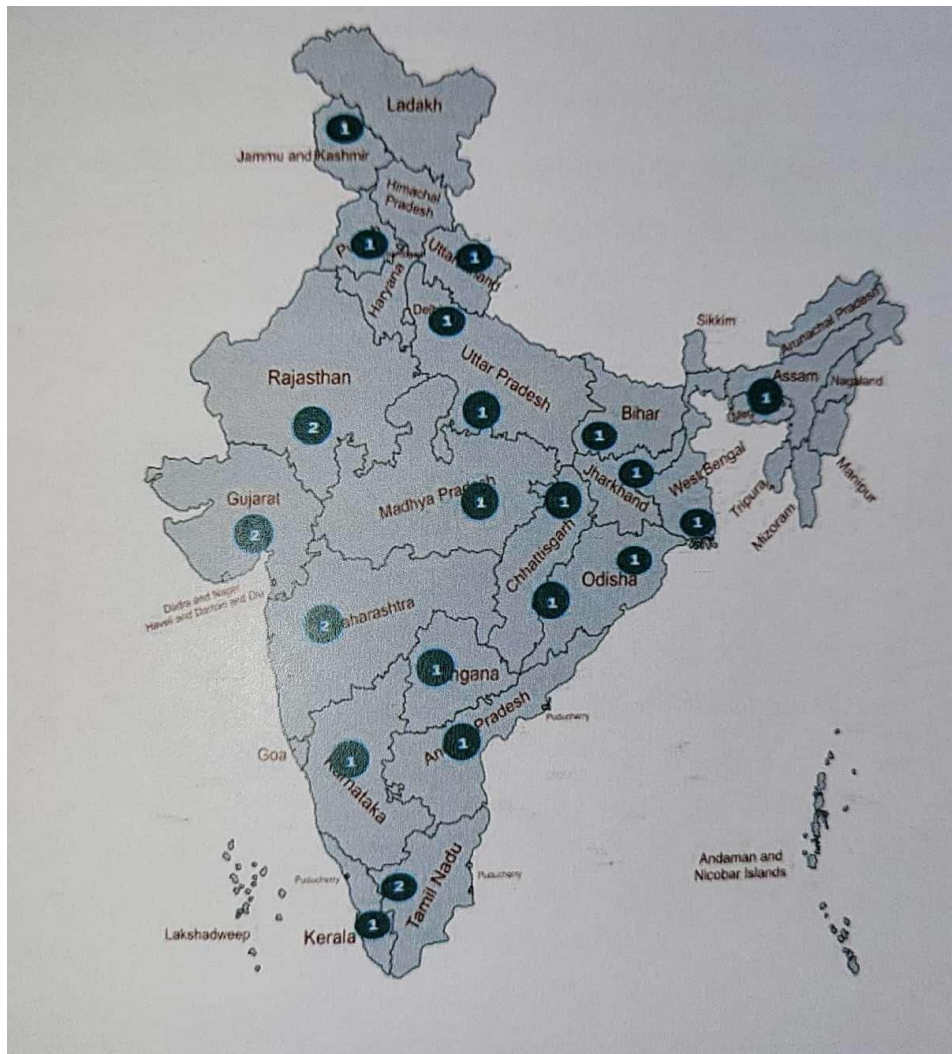


Fig.4.1 Data collection Method, Source: Own Analysis

4.2 Analysis

In the first section of analysis, Descriptive Statistics about the data is being analysed.



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Fig 4.2 State Wise Count of Cities analysed, source: Own Analysis

The above graph indicates state wise distribution of cities analyzed.

65 stores were analyzed.
24 tier II and tier III cities were covered in total.
The number of images examined was 256.
Retail Ratings on average: 4.1

Table 4.1: Descriptive Metrics, Source: Own Analysis

The above table summarizes key data collection metrics.

In the second section of analysis. Thematic Analysis output is discussed as below

4.2.1 Theme 1. Brand Taping

A common practice to indicate the limits of a specific brand's merchandise inside the Kirana Store is brand taping. It aids in establishing a visual difference from the store's

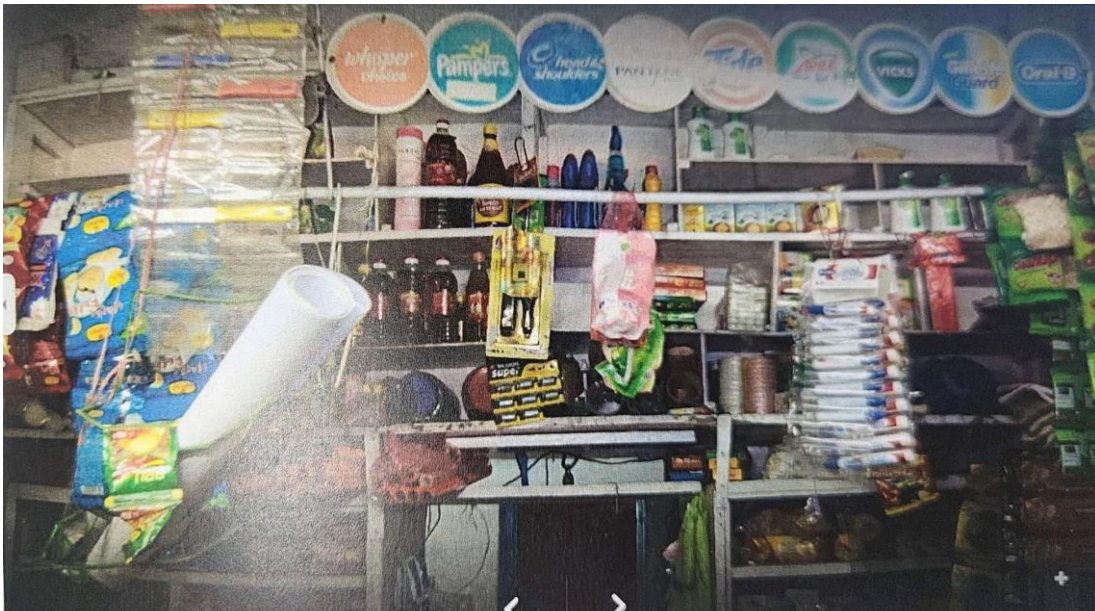
other categories. When things are arranged vertically, bespoke taping is really helpful. The products are arranged in rectangular boxes, and Brand Tapes are used to highlight certain products or groups of products within the boundary space. Its application is illustrated by the following data visual examples:



Fig 4.3: Brand Taping, Source: Google Maps

4.2.2 Theme 2: Brand Garlands

Brand garlands are one of Hindustan Unilever's most widely employed strategies. A brand garland is a circular chain made up of product logos from the firm that highlights the many brands it offers in-store. Typically composed of paper, the Brand Garland is adhered to the upper surface of the storefront. It clearly communicates the brand's existence and is observable from a distance. Ice cream makers also utilize the Brand Garland technique to showcase the variety of flavors available at a store.



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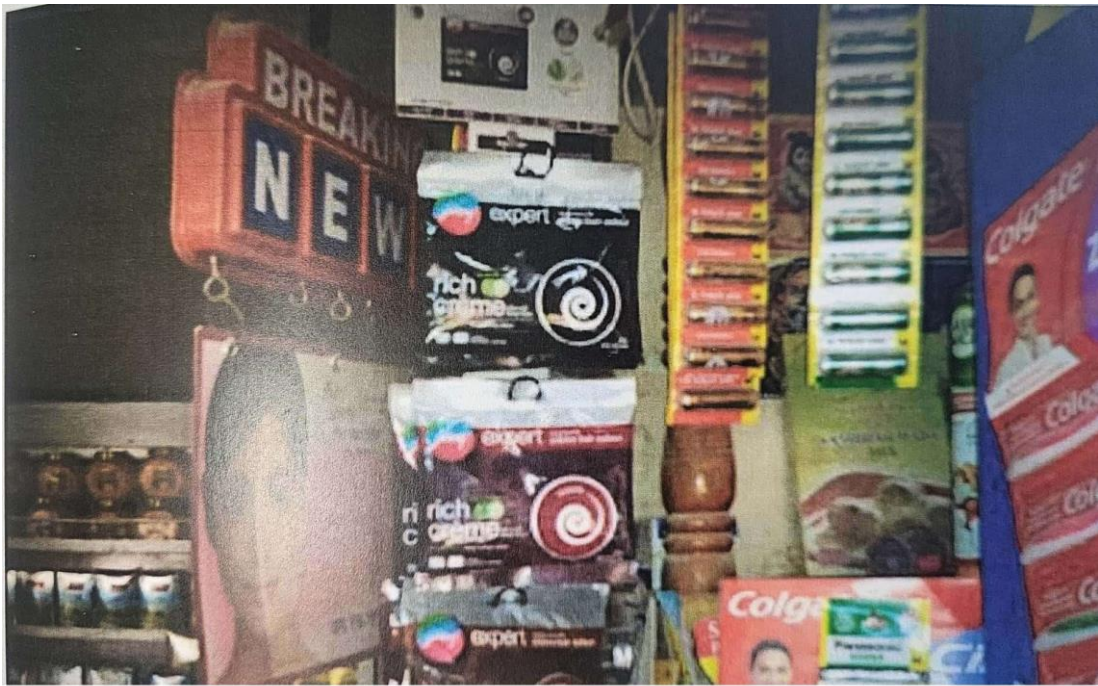
Fig 4.4: Brand Garland, Source: Google Maps

4.2.3 Theme 3: Brand Hangers

Compared to a supermarket, a Kirana Store is substantially smaller. There are more products and not much room. Hangers are therefore useful in order to accommodate more products in the store. The brands that create these hangers give them to store owners as a way to solve space problems and differentiate their brand from the competition. Using hangers to showcase things is a motif that combines usefulness with exposure.

4.2.4 Theme 4. Shop Signage

It is best to place huge cardboard-based brand promotional objects outside the store. Those walking by the store can see the enormous cuts. Additionally, this area is used to set up little kiosks for organizing games or lucky drawings for a particular product. Since storefront branding makes goods theft simpler, additional safety precautions are needed. But it's an excellent place to start when announcing a big presence or the debut of a new product.



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Fig 4.5: Storefront Branding, Source: Google Maps

4.2.5 Theme 5: Kirana Name Banner

The banner has the name of the Kirana store. Businesses like Kwaliti Walls, Coca-Cola, Fortune Oil, Tops, etc. use this space the most. The Brand Name and their selection of products are shown in this prominent area of Kirana Stores. Sometimes, as with Coca-Cola, it may merely display the brand name and a photo of a celebrity. It is noted that while this topic is common in the North, East, and Western parts of India, it is not as popular in South India.



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Fig 4.6: Kirana Banner, Source: Google Maps

4.2.6 Theme 6: Bill Desk Branding

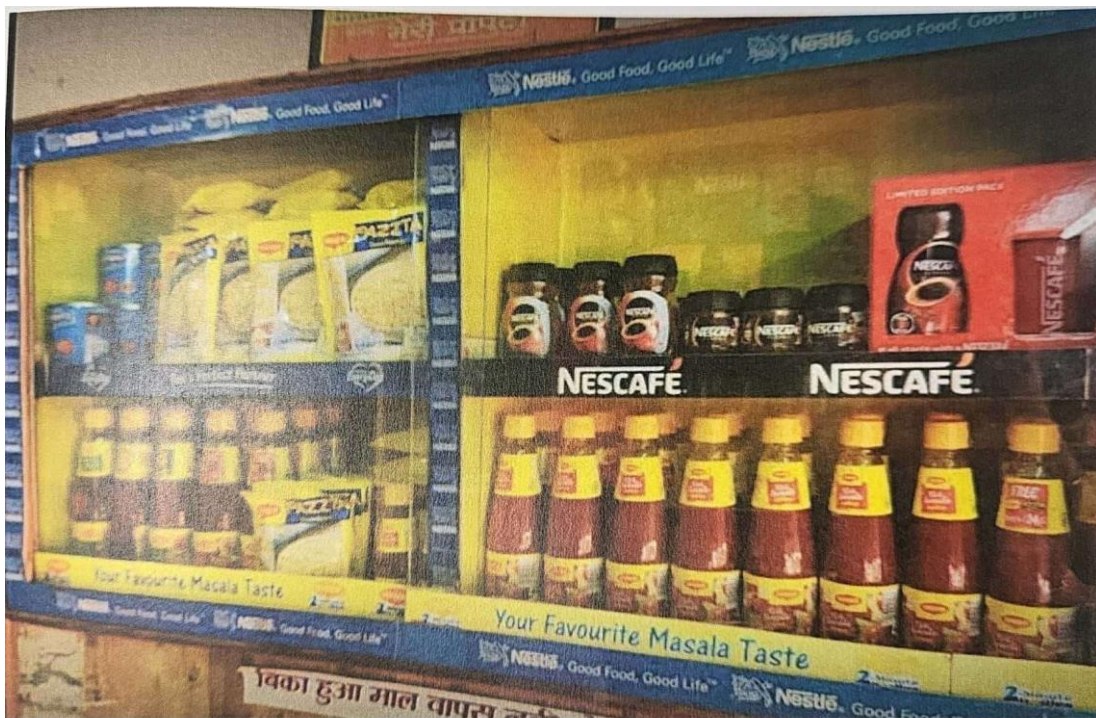
The billing desk is the last point of sale. A big promotional sheet that fits the size of the desk is pasted onto the billing desk table. Considering how little the entire Kirana store is, it is a surprisingly vast place. Wear and tear are common in this area. Modern payment providers like PhonePe and PayTM are becoming more and more necessary on the bill desk. Businesses align their products in the middle of the table or attach promotional materials to the lower part of the bill desk. The goal is to catch people's attention as they leave the store.



Fig 4.7: Bill Desk, Source: Google Maps

4.2.7 Theme 7: Combined Family Branding

Keeping all Nestle products together is a technique that the company heavily uses in its visual merchandising strategy across India. It is observed that this product's entire line is kept on a single shelf. This kind of approach establishes market leadership and facilitates the launch of new brands from the house of brands. For efficient visual message, this style places the brand's most well-known product front and center, with supporting products arranged around it.



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Fig 4.8: Nestle Family Branding, Source: Google Maps

4.2.8 Theme 8: Stacking Pyramid

Making a stacked pyramid is another way a brand can differentiate itself from the competition. It presents products consistently and draws clients in with ease. Products that can be stacked on top of one another without breaking are suitable for use with the stacking pyramid. When consumers of Kirana Store are able to explore the interior of the store, its usefulness increases. Additionally effective for branding outside of stores is this design.



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Fig 4.9: Ariel Stack Pyramid, Source: Google Maps

4.2.9 Theme 9: Utilizing Colors in Coding

Companies with strong brand memory, like as Cadbury, color-code their goods and give Kirana Stores the space and resources they need to maintain their inventory. It increases the appeal of their products and helps to fortify brand identification.

4.2.10 Framework Method Analysis

The four physical components that affect customer store loyalty in a supermarket setting are described in a framework created by Thilina Dk and Nomesha Liyanage for their research paper, "The Impact of Physical Evidences on Customer Store Loyalty with Special Reference to Supermarket Industry in Sri Lanka".

4.3 The framework is as follows:

Independent Variables	Dependent Variables
<ol style="list-style-type: none">1. Layout2. Signage3. Lighting4. Sign Boards	Customer Store Loyalty

Fig 4.10: Elements of Store Loyalty, Source: Thilina et al, Research Paper

4.3.1 Layout

Both customers and store personnel benefit from a well-designed retail layout. Similar items are grouped together to make it easier for customers to find them and to help the shopkeeper serve them. For instance, the design of Lifestyle stores in India places the women's and men's areas on different floors.

4.3.2 Signage

Signs make it easier for customers to find what they need and traverse the stores. In addition to section signage, retailers occasionally post information about how long customers must wait at billing counters. Additionally, some establishments employ signage to show where the restrooms are as well as the entry and departure locations.

4.3.4 Lighting

Light helps to transmit the necessary vibe and establishes the store's ambiance. For example, most establishments utilize yellow hanging lights inside, outside, and surrounding the store to create a cheerful and festive atmosphere during Diwali in India.

4.3.5 Signboard

Sign boards are a crucial element of many well-known local businesses. Some stores post driving directions and their location on signboards along the route that leads to the store. Some use outside sign boards to showcase their daily deals or ongoing promotions.

Using the following criteria, we assessed our 256 photos and identified the following Kirana Stores characteristics:

S.no	Variable	Common Feature(s)
1	Layout	Grid Layout, Unorganised, Mixed Structure
2	Signage	Outdoor Signage, Informational in Nature
3	Lighting	Low Night Light Visibility
4	Signboard	Indicative of Price, Discount and Brand Promotions

Table 4.2: Analysis of Store Layout Elements, Source: Own Analysis

1. From the above analysis, we can infer that:
2. Visual Merchandising should be done in a manner that it best fits the Grid Layout Structure.
3. Persuasive style of signage can be explored by brands to boost brand promotions.
4. Since low night visibility is a potential con of placing products in Kirana Stores, brands should insist stores to make adequate lighting in order to be eligible for exclusive benefits.
5. Signboards are crucial in indicating price and discount which is suitable in attracting value-based customers. Bold Signboards with clear fonts are pivotal to ensure that sales schemes are identified by the customers.

4.3.6 Validation by Subject Matter Experts

The themes mentioned in this section have been examined by subject matter experts and Kirana store owners.

Two Kirana Store owners from the Delhi NCR region of India have been selected by convenience sampling. The study's goal and methodology were explained before the themes were presented to the business owners in Hindi, the native tongue. They've found that the topics are relevant and helpful.

The following images are proof of the face-to-face meeting that happened on May 30, 2024:



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Fig 4.11: Validation by SME Image 1. Source: Own Analysis

4.3.7 Validation through Interviews

Twelve participants were interviewed over the phone to confirm the themes found in this study. The participants were from India's Tier II and Tier III cities, specifically

Jammu

Patna

Meerut

Kanpur

Pune

Kozhikode

What three questions were asked during the interview?

Do you think the themes listed are applicable to your city?

Do you believe that the themes found may be applied to Indian cities classified as Tier II and Tier III?

Are there any other recommendations you would want to offer?

Question 1 and Question 2 received positive responses from every participant.

In Question 3, five people offered their recommendations. The following are them: -

A Chip Rack

The respondent noted that a rack of chips is typically prominently displayed at the store's entryway for convenient collection. The precise recommendation is as follows: "I occasionally visit the Kirana store and simply grab a bag of chips from the rack. The bulk of the products on the rack are packaged as Masala Sachets, Kurkure Namkeen, or Lays.

The most visible feature of a Kirana Store, according to one respondent, is the amount of namkeen and masala pack sachets that are hung out front. To use the actual words that were stated:

"When a variety of Namkeen and Masala packs are hanging from Lehar Namkeen to Maggi Masala, I know I am at a Kirana Store and not a supermarket." Occasionally, I go specifically to a Kirana store to purchase a sachet product."

Coca-Cola and Pepsi refrigerator

One respondent mentioned that he always finds a refrigerator with Coca-Cola or Pepsi when he visits a Kirana Store. To paraphrase him exactly, he said, "I've seen that Pepsi and Coca-Cola brands are heavily promoted in the freezers at Kirana Stores. I have seldom observed that location to be vacant." One respondent said that whenever he enters a Kirana Store, he always finds a refrigerator filled with Coca-Cola or Pepsi. In precise quote, he stated, "I've noticed that Kirana Store freezers prominently feature the Pepsi and Coca-Cola brands. That place is rarely empty in my experience."

Toffee payment method

A respondent recalled with nostalgia how, as a child, they used to get paid change in toffees. She seems to enjoy that mode of payment and talks about a memorable event. She said, "I remember going to a Kirana Store just to get a Coffey Bite." Ten Coffy bites were given to me for five rupees and change. One of the main reasons I enjoy going to the supermarket is to buy toffees. I still adore that toffee.

Problems with Stock Availability. One of the responders suggested that in an emergency, Kirana Stores ought to be the first place one goes. He continued by saying that because the store wasn't always carrying a particular brand, he had to make adjustments based on product availability. To state it just as he did:

"Usually, my maid reminds me to buy laundry powder, but I wait until the last minute to do it. When I visit my local Kirana Store, bhaiyya, they usually don't have Surf Excel. I have to make accommodations for Nirma or Rin, whichever is free.

The themes identified during the interviews were thus validated, and the respondents' unique experiences with Kirana Stores were incorporated..

4.4 Quantitative and qualitative analysis

This chart showcases the sample size and their frequency to go to the Kirana store

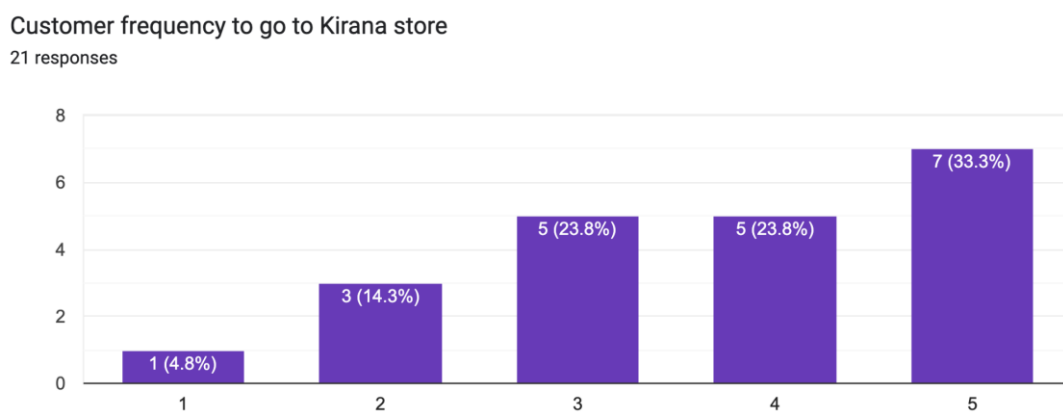


Fig. 4.12 Customer frequency

Through SPSS the following analysis was conducted for the following hypotheses which were created according to the framework built above.

Hypotheses 1.

H0: The layout has no significant impact on the Customer store loyalty.

H1: The layout has a significant impact on the Customer store loyalty.

Qualitative analysis

The store layout is easy to navigate.

21 responses

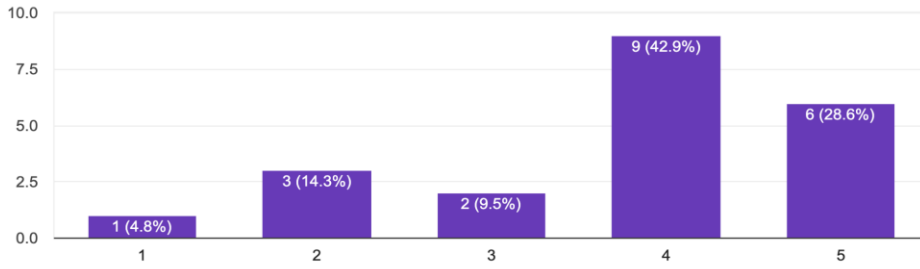


Fig.4.13 Store layout analysis

Products are organized in a way that makes them easy to find.

21 responses

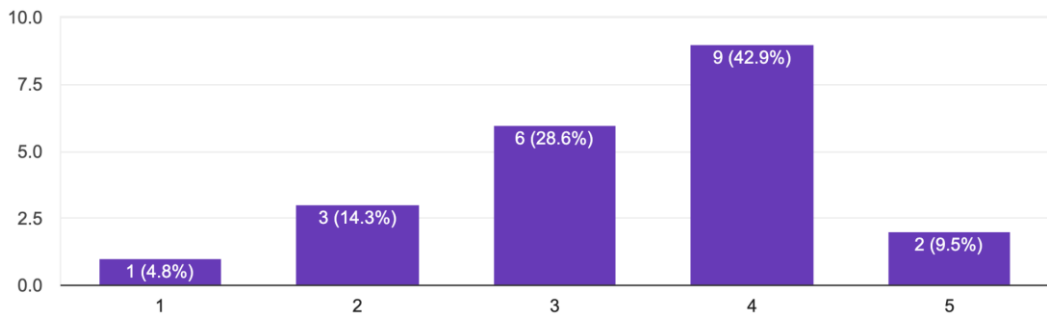


Fig.4.14 Product organization chart

Quantitative analysis-

t-Test: Paired Two Sample for Means

	Variable 1	Variable 2
Mean	3.666666666	3.76190476
Variance	1.533333333	1.39047619
Observations	21	21
Pearson Correlation	0.83324274	
Hypothesized Difference	0	
df	20	
t Stat	0.62317695	
P(T<=t) one-tail	0.27010517	
t Critical one-tail	1.72471824	
P(T<=t) two-tail	0.54021034	

This indicates that the layout has a significant difference on the customer loyalty

Hypotheses 2.

H0: The signage no significant impact on the Customer store loyalty.

H1: The signage has significant impact on the Customer store loyalty.

Qualitative analysis

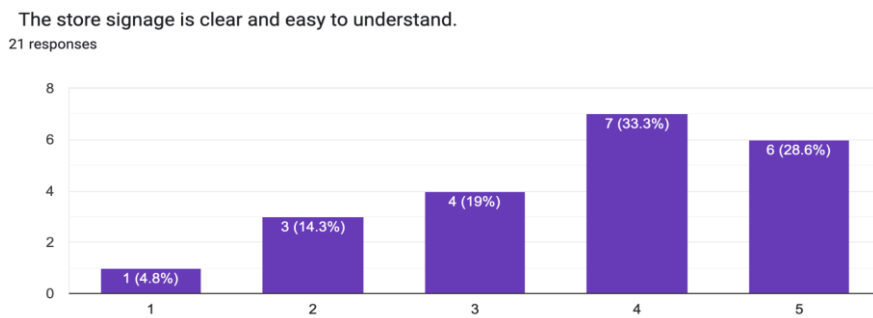


Fig.4.15 Store signage chart

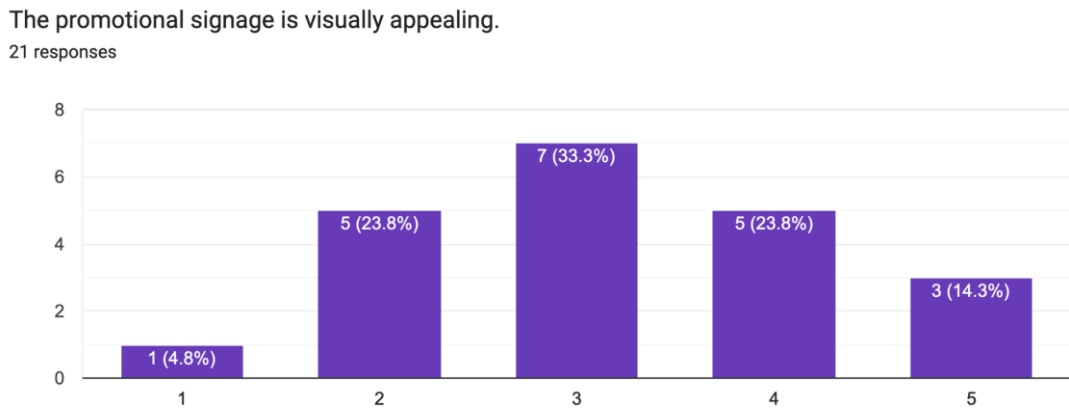


Fig.4.16 Promotional Signage chart

Quantitative analysis

t-Test: Paired Two Sample for Means

	Variable 1	Variable 2
Mean	3.66666666	3.66666666
	7	7

		1.43333333	1.33333333
Variance		3	3
Observations		21	21
		0.89214922	
Pearson Correlation		1	
Hypothesized	Mean		
Difference		0	
df		20	
t Stat		0	
P(T<=t) one-tail		0.5	
		1.72471824	
t Critical one-tail		3	
P(T<=t) two-tail		1	
		2.08596344	
t Critical two-tail		7	

This indicates that the signage has a significant impact on the customer loyalty.

Hypotheses 3.

H0: The lighting has no significant impact on the Customer store loyalty.

H1: The lighting has a significant impact on the Customer store loyalty.

Qualitative analysis

The store is well-lit and allows me to see products clearly.

21 responses

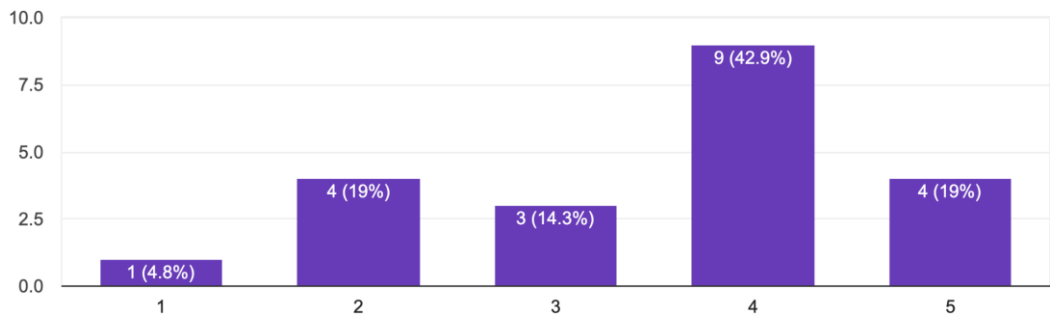


Fig.4.17Lighting impact on customers

The lighting creates a pleasant and inviting atmosphere.

21 responses

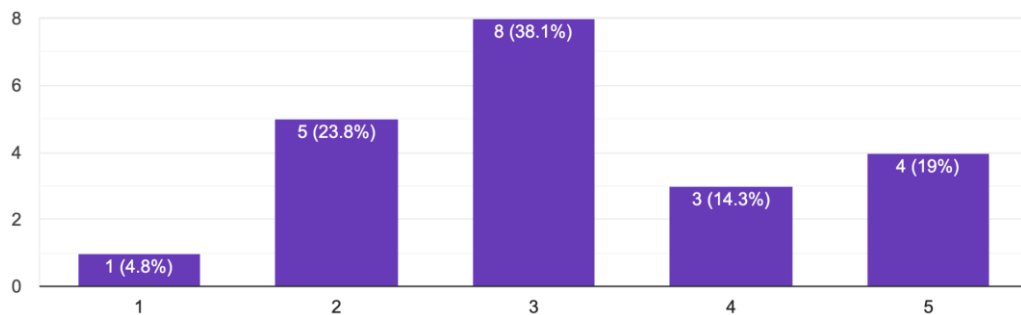


Fig.4.18 Store lighting impact on customers charts
Quantitative analysis:

t-Test: Paired Two Sample for Means

	<i>Variable 1</i>	<i>Variable 2</i>
Mean	3.666666666	3.523809524
Variance	1.333333333	1.361904762
Observations	7	7
Pearson Correlation	0.87814121	
Hypothesized Difference	Mean	0
df	20	
t Stat	1.14208048	
P(T<=t) one-tail	0.13345496	
t Critical one-tail	1.72471824	
P(T<=t) two-tail	0.26690993	
t Critical two-tail	2.08596344	

The lighting does not have a major impact on the customer loyalty as per the qualitative and quantitative analysis. But does a significant impact on the customer loyalty.

Hypothesis 4

H0: The sign boards has no significant impact on the Customer store loyalty.

H1: The sign boards has a significant impact on the Customer store loyalty.

Qualitative analysis

The information on the sign boards is helpful.

21 responses

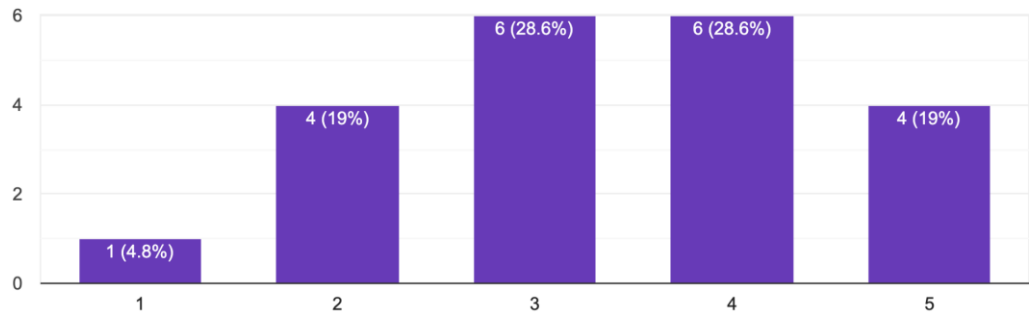


Fig.4.19 Sign boards information are helpful analysis chart

Quantitative analysis

t-Test: Paired Two Sample for Means

	Variable 1	Variable 2
Mean	3.666666666	3.38095238
Variance	1.333333333	1.34761904
Observations	21	21
Pearson Correlation	0.92008411	
Hypothesized Difference	Mean	
df	20	
t Stat	2.82842712	
P(T<=t) one-tail	0.00519123	
t Critical one-tail	1.72471824	
P(T<=t) two-tail	0.01038247	
t Critical two-tail	2.08596344	

There is a significant impact of sign boards on the loyalty of the customers. The loyalty of the various customers was also analysed and studied and the following qualitative analysis can be drawn. The customer loyalty depends on the various independent variables like

Variable Name
Layout
Signage

Lighting
Signboard

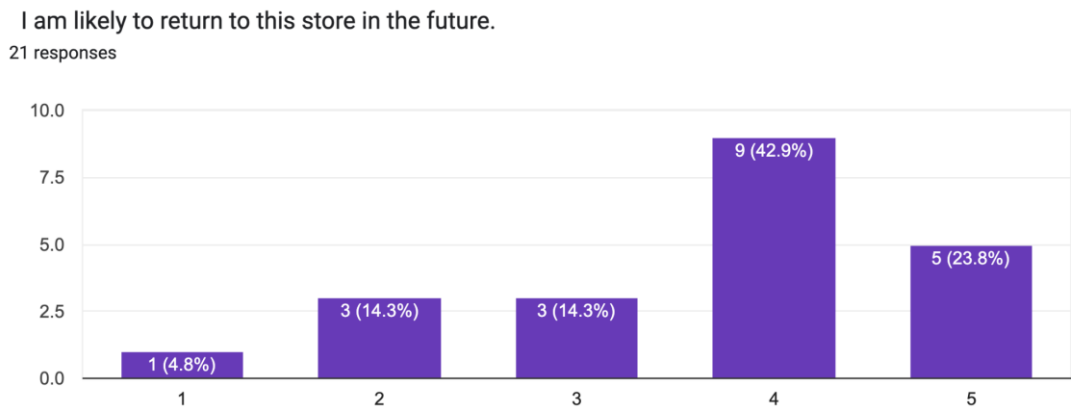


Fig.4.20 Customers loyalty towards store

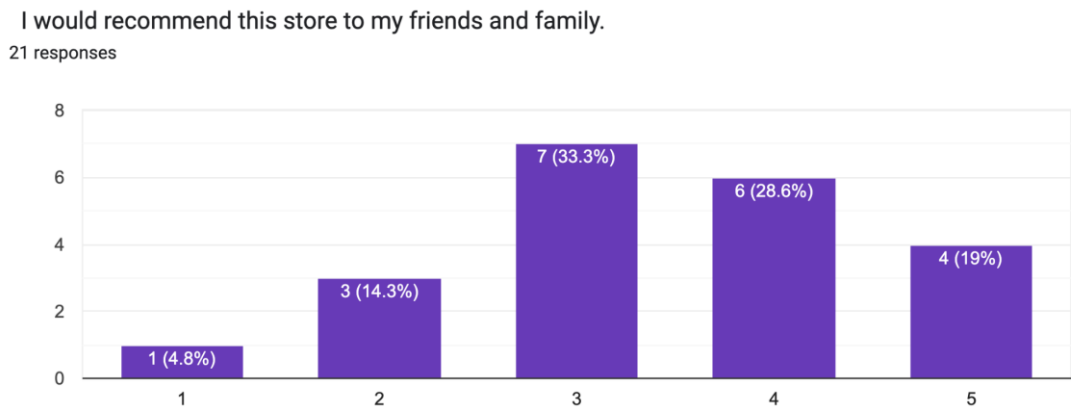


Fig.4.21 Customers recommendation rate for the store

4.4 3W Framework

The themes examined in the preceding section are grouped to provide a conceptual framework. Key visual merchandising techniques used by Kirana Stores in Tier II and Tier III cities are outlined in this summary.

Which method should I use?

- Brand Garlands and Brand Taping
- Hangers with brands

Where should your promotional materials be placed?

- Retail Front Bill Desk
- Kirana Name Banner

Which strategy should I use for product placement?

- Color coding, pyramid stacking, and a cohesive brand family

A Visual Merchandising in Tier II and Tier III Indian Cities: An Empirical Framework
Kirana Shops

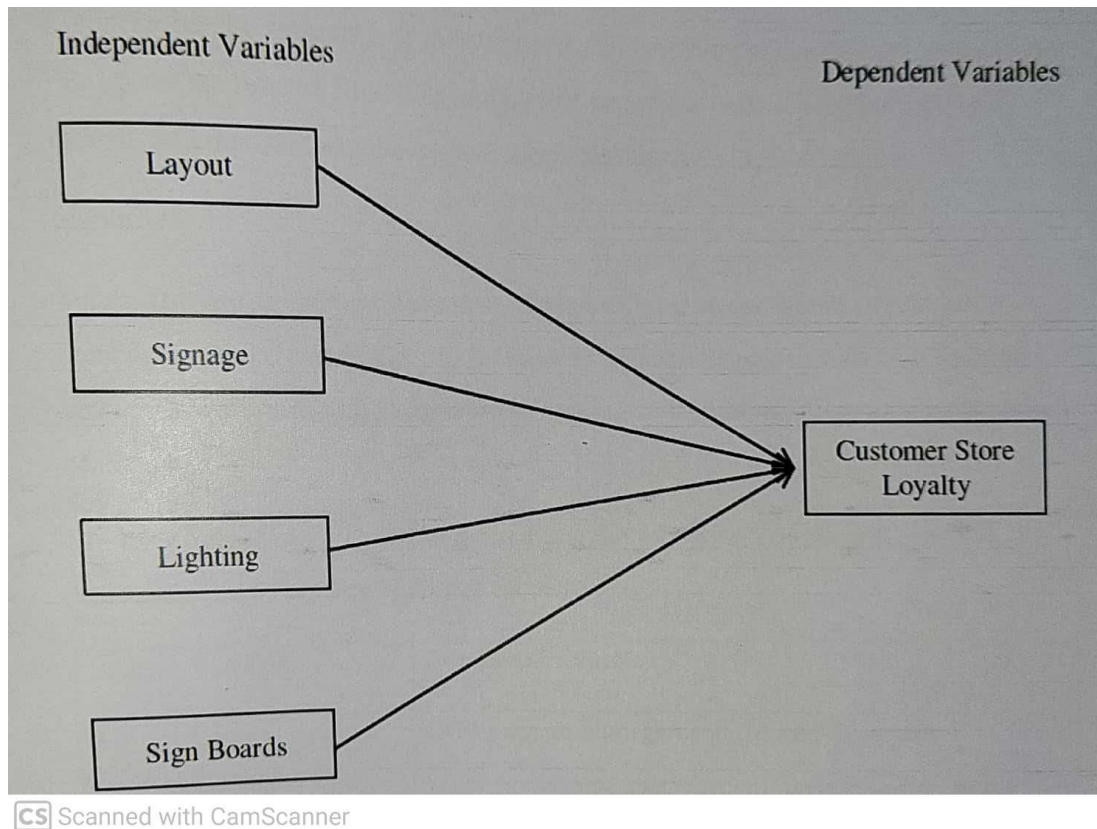


Fig 4.22: 3W Framework, Source: Own Analysis

Users of this Framework

1. Presently available brands looking to get a presence in the rural market through Kirana Stores
2. New businesses searching for strategies to promote their brands in India's rural areas
3. Researchers in marketing who are interested in looking at brand promotion strategies in rural India or carrying out further research on Kirana Stores in India
4. Students majoring in business, management, or another field who are eager to learn more about the research topic.

CHAPTER 5: CONCLUSION

Since shelf space is becoming more competitive, it has become more crucial to identify positioning strategies and places for brands to achieve maximum visibility. India's rural areas may emerge as the next big thing in the retail sector, and Kirana Stores will be leading the charge there.

Through an exploratory study, this research offers insights into the visual merchandising practises of Kirana Stores in India. The findings of a thematic analysis revealed several themes, like Brand Taping. In India's Kirana Stores, reoccurring phenomena include brand garlands and color coding. In addition, the suggested conceptual framework provides solutions to queries about visual merchandising methods, product placement strategies, and placement aesthetics.

There are various implications of this research for relevant parties. Businesses can immediately learn from Kirana Stores in India how to position their brands efficiently; at the same time, researchers can uncover new aspects of branding, and students can satiate their curiosity about visual merchandising. When all is said and done, this study on retail branding and visual merchandising is valuable.

Further research on this subject might compare supermarkets and Kirana-based visual merchandising, assess how much of an impact each tactic can have on consumers' opinions, and look into any other pertinent angle the researcher feels like looking into.

5.1 Limitations of this Research

The study focused primarily on a select set of visual merchandising factors, potentially excluding other variables that could influence customer loyalty. Additionally, the research was confined to a specific geographic region or demographic, limiting the generalizability of the findings.

Please be aware of the following limitations on this research investigation.

1. The owner of the Kirana Store took and uploaded all of the images, which led to inconsistent data gathering.
2. Images of poor quality that are hard to read
3. The literature review for India's Kirana Stores was insufficient.

The reliance on qualitative methods may have introduced subjectivity and limited the depth of analysis. A more diverse methodological approach incorporating quantitative measures could provide a more comprehensive understanding.

5.2 Recommendations

Research to date has focused on the many tactics that businesses are employing through Kirana Stores to raise their profile in rural India. This section's recommendations are predicated on the recognition of white spaces in picture-based brand advertising. In the future, brands might want to think about implementing the following suggestions:

1. Offer Personalized Tote Bags

Customers at Kirana shops occasionally assume the proprietor would provide them with a carry bag, or they forget their own at home. Placing carry bags with company names at the payment counter is one method to raise brand recognition. Customers will still take home the carry bag, which will be on display for everyone to see, whether or not they choose to purchase an item from the designated brand.

2. Put the local product front and center in branding materials.

Shoppers visit their neighborhood Kirana Stores in the aim of finding locally made products. Either a young or well-known company may decide to use packaging to communicate in a way that best showcases the regional product. Muga Silk, for example, comes from Assam. Something like, "With our detergent Nirma, your clothes will shine brighter than Muga," can be the tagline used by a detergent company.

3. Listings on a Scale of Weight Scale weighing can communicate ideas that bolster brand assurance.

Savlon, for example, promotes their campaign using the hashtag #Bharosa MaaSa. You can use this decal on a scale where people are probably going to place their trust.

4. Create a Visual Appeal That Is Instagram-worthy

Thanks to social networking apps, you may now take a memorable picture at any location. The Kirana Store is one place where travelers go to restock on necessities when they run out. In-store cardboard caricatures can be used by brands to create an Instagram-worthy experience that doubles as a photo booth and a means of increasing brand recognition.

5. Etching the slogan of your company on the rear of the chair

On days when there is a lot of foot traffic, owners of Kirana Stores are frequently observed standing. Consequently, you may write inspirational phrases like "rest your faith in us" or anything else you like on the chair's back.

5.3 Scope for Future Research

1. **Longitudinal Studies:** Conducting longitudinal studies to track changes in consumer behavior and loyalty over time in response to evolving visual merchandising strategies can provide valuable insights into the long-term effectiveness of these initiatives.
2. **Comparative Studies:** Comparative studies across different regions or demographic groups within India, as well as cross-cultural comparisons with other countries, can further enrich our understanding of visual merchandising dynamics.
3. **Exploration of Emerging Trends:** Exploring the impact of emerging trends such as e-commerce integration and sustainability initiatives on visual merchandising practices in kirana stores represents an area ripe for future research.

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Summary