

**Project Dissertation Report on**

**A Study on Visual Merchandising of**

**Kirana Stores in India**

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## **CERTIFICATE**

This is to certify that the Project Report titled “A Study on Visual Merchandising of Kirana Stores in India”, is a bonafide work carried out by Ojasvita Arora of DMBA 2020-2022 and submitted to Delhi School of Management, Delhi Technological University, Bawana Road, Delhi-42 in partial fulfilment of the requirement for the award of the degree of Master of Business Administration.

Signature of Guide

Signature of Head

Place:

Date:

## **DECLARATION**

I, Ojasvita Arora, second year MBA student at Delhi School of Management, DTU, would like to formally declare that this project report entitled – A Study on Visual Merchandising of Kirana Stores in India, submitted in partial fulfilment of Degree of Masters of Business Administration, is my original piece of work.

The information and data given in the report is authentic to the best of my knowledge.

This report is not being submitted to any other University for award of any other Degree, Diploma and Fellowship

Ojasvita Arora

Place:

Date:

## **ACKNOWLEDGEMENT**

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Ojasvita Arora

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## **EXECUTIVE SUMMARY**

The purpose of this research is to provide a conceptual framework for implementing Visual merchandising in Kirana Stores in India. Visual Merchandising is a key component of retail brand promotions. This study is useful in understanding the present state of visual merchandising in Kirana Stores.

A Qualitative Study of 250+ Kirana Store pictures of Tier II and Tier III cities of India have been studied for the purpose of this research. Through visual ethnography study conducted using Google Maps data, the research intends to explore the various facets of visual merchandising in Kirana Stores and propose a conceptual framework for future application.

The conceptual framework addresses the concerns of what kind of techniques of visual merchandising to apply, where to place your branding material and what style of product placement to adopt.

**Keywords:** Visual Merchandising, Kirana Stores, Branding, Retail, Rural India

## TABLE OF CONTENTS

<b>S.No.</b>	<b>Particulars</b>	<b>Page No.</b>
1.	Introduction	1
	1.1 Background	1
	1.2 Problem Statement	8
	1.3 Objectives of Study	8
	1.4 Scope of this Study	8
2.	Literature Review	9
3.	Research Methodology	19
4.	Analysis, Discussion and Recommendation	22
	4.1 Data Collection	22
	4.2 Analysis	23
	4.3 Findings and Recommendations	38
	4.4 Limitations of this Study	40
5.	Conclusion	41
6.	Bibliography	42
7.	Annexure	46

## LIST OF TABLES AND FIGURES

### List of Figures

S.No.	Name	Page Number
1.1	Composition of Retail Sector	2
2.1	Early Methods of Branding	9
3.1	Research Framework	21
4.1	Data Collection	22
4.2	State Wise count of cities	23
4.3	Brand Taping	24
4.4	Brand Garland	25
4.5	Brand Hanger	25
4.6	Store Front Branding	26
4.7	Kirana Banner	27
4.8	Bill Desk	27
4.9	Nestle Family Branding	28
4.10	Ariel Stack Pyramid	29
4.11	Cadbury Purple Colour	30
4.12	Elements of Store Loyalty	32
4.13	Validation by SME Store 1	34
4.14	Validation by SME Store 2	35
4.15	3W Framework	38

### List of Tables

S.No.	Name	Page Number
4.1	Descriptive Metrics	23
4.2	Analysis of Store Layout Elements	33

## **CHAPTER 1: INTRODUCTION**

Creating a rural relevant brand is critical to charting a success story for a brand in the Indian landscape. Around 70 % of Indian population lives in rural parts of India. Far more than the retail supermarkets, it is the Kirana Stores that cater to the daily needs of people living in the rural cities. While Kirana Stores are part of the unorganised sector of the Indian Retail industry, they are not impossible to access. Popular manufacturers like HUL and Dabur have been selling their products through Kirana Stores since decades. However, those brands have cracked the retail code years ago. As start-ups bloom in the growing Indian economy, it is important for them to know how to capture the Indian hearts.

In this research paper, we analyse branding at Kirana stores through the lens of Visual Merchandising. Visual Merchandising is the practice of arranging and placing products, signs and other in-store elements, in a manner that it best appeases the target audience. Kirana Stores have long been neighbourhood stars. When we analyse them in terms of Visual Merchandising, we draw insights into the mind of the owner, local taste and how brands are positioned in the visual narrative. By gauging the present state of visual merchandising, this research intends to propose a conceptual framework for brands and start-ups who want to shine in the Kirana landscape.

### **1.1 Background**

#### **Indian Retail Sector**

According to a report published by top consulting firm BCG and the Retailers Association of India, the retail industry is expected to grow at a pace of 10% annual growth and reach \$2 trillion in the next decade.

The retail landscape is characterized by:

- Narrowing boundaries between online and offline
- New Revenue Models like Buy Now Pay Later
- Hyper competition



- Personalization
- Focus on Experiential Marketing

Despite challenges posed by COVID-19, India's household consumption is pegged at 130 trillion dollars in 2021, according to BCG. This consumption is fueled by:

- Rise in Household Income
- Increased Accessibility to information
- Behavioral shifts like shopping 24x7
- General tendency to increase spending

The Consumer Confidence Index published by RBI stands at 71.7 in March 2022 which indicates a return to normalcy, as compared to pre pandemic levels when it was 70 in 2019.

Modern retail formats have disrupted the unorganized nature of Indian retail sector, way before the entry of online shopping giants. The rise of supermarkets, 24x7 convenience stores have had a tremendous impact on how India shops. However, this trend is a defining characteristic of the urban or metro cities of India. Therefore, the Tier II and Tier III cities are still dominated by the unorganized sector. The below graph is a testimony of the same:

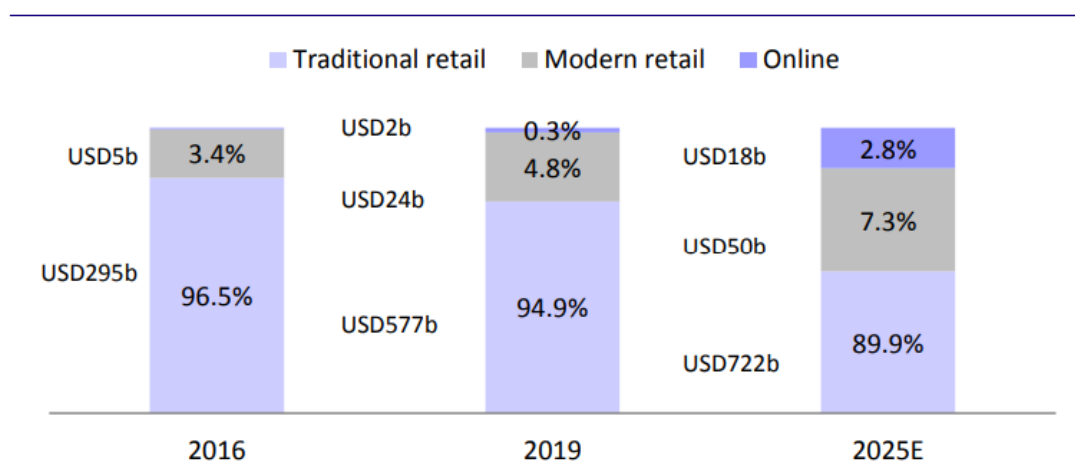


Fig 1.1: Composition of retail sector, Source: RedSeer report

## Consumer Behavior Shifts in Retail Sector

Following are the emerging trends in consumer behavior:

### 1. Concern for Healthy Living

There is a growing concern to consume products after noting its calorie intake. The rise of apps like HealthifyMe have accentuated this concern and made it a household issue.

### 2. Rising Millennial Consumer

The consumer which was born two decades ago is now getting a job, looking for marriage prospects and becoming a full-grown adult. The millennial consumer is tech savvy, likes challenging the status quo and is accepting of new changes.

### 3. Concern for Privacy

The present-day consumer is aware about how data is being collected from him or her and utilized to target personalized ads. With the growing digitization and rising awareness towards privacy laws, consumers are concerned how their data is stored and the level of confidentiality that is being followed.

### 4. Convenience lover

Customers like shopping at the comfort of their home with lightning-fast deliveries. There is a rise in midnight shoppers and stores that caters to their needs. Further, convenience in return processes, refunds is also a major concern in choice of a shopping platform or an offline store.

### 5. Personalized Shopping Experience

There is an increasing expectation of the consumer to expect the store to remember his or her choices, whether or not he or she is a high-ticket consumer. This is a new development for stores who delivered generalized experiences in the past but now have to match up to the expectations of the new age consumer.

## Challenges in the Retail Industry

### 1. Tightening of Laws

Regulation in the retail sector is characterized by FDI in multi brand retail, GST, updated minimum wage laws, laws on gig workers and privacy protection laws.

### 2. Infrastructure

Despite the rise in developments, the retail sector continues to suffer from a lack of uniform infrastructure that supports the growth of retail sector, especially in rural areas.

### 3. Counterfeit Products

With the advent of e-commerce, it has become increasingly difficult to spot original products. This has led to diminishing brand value for few and high return rates for others.

### 4. Labour Issues

It has becoming increasingly competitive to find skilled labour especially among blue collar workers. The diversion of gig workers towards food delivery startups has made it more competitive to negotiate for workers.

## 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 stopped outside a clothing store and admired the display on the mannequin? And as a next step went inside and purchased the exact same dress that was displayed outside, even when you were visiting that store for the first time. This is the impact of a concept called visual merchandising. Visual merchandising is an art of organizing and displaying products at a retail store that stimulates customers' imagination and convinces them to make impulse purchases. If done correctly, the attraction can convert a passive buyer to an active buyer.

Over time, visual merchandising has developed to include elements related to both store interiors and store exteriors. With respect to store exteriors, shop owners can pay attention to the signage, window displays, mannequins, lighting, and the entrance. In the interiors, points to be noted are store layout, product placements, shelf design, fixtures and fittings, color themes, the aisles, background music, lights and ambience, product promotions, loyalty programs, endcap displays and the checkout counters. In the current world, visual merchandising has become an important part of retailing. Though, its' elements are different for different types of stores, the core of this exercise lies in understanding the customer. Particularly, with respect to Kirana stores in India, visual merchandising has evolved a lot over time.

In the past, shopkeepers at Kirana stores used to arrange product placements in their shops as per their convenience in serving the customers. Also, they had display of toffees and candies on the front counters to attract the kids. Over time, branding activities came into prominence. Then, the famous brands in each category were neatly displayed on the shelves in prominent positions. The front counters were then replaced by see through glass counters. Customers could easily see the items displayed in them. Next, came the era of brand based attractive containers for displaying at Kirana stores. For example, Maggi provided shopkeepers with large nets that would contain the

maggi packets and would be displayed upfront. Similarly, Vicks also provided hanging compartments to shop owners. Here, the compartments were designed based on the size of various Vicks products. Moving on, banners and hoardings also became a popular mode of visual merchandising. Coca Cola provided custom banners to store owners with their store names and Coca Cola branding – name, color scheme and picture of actors and actresses from their advertisements. Now, big brands like HUL have also started purchasing shelf space where they display a different array of products every month. Usually, in rural areas, their focus is on displaying their widely used products like Lux soap and Red Label tea.

To conclude, we can say that visual merchandising initiatives are an important factor for increasing sale of branded products and hence the sales at the local Kirana stores.

### Impact of Visual Merchandising

When people shop, they often feel they are buying items, but they are actually buying the shopping experience. The way things are exhibited and advertised can have a big influence on how people react to them and how much they buy. Retailers may increase sales and profit margins by exhibiting products in an enticing, accessible, and attractive ways. Some of the impacts of visual merchandising are:

A Coverage that is comprehensive

A significant component of sales success is promoting a brand in many locations. Advertising, shop design, window display, and product appearance and placement are all part of visual merchandising. Shop owners may raise customer awareness of the product and increase the likelihood that he/she will buy it by employing a consistent visual theme that goes through all of these scenarios. The importance of repetition in encoding a message in the brain cannot be overstated. A compelling and appealing message is created by exhibiting a repeated product theme in the storefront window, interior displays, and on the product package itself.

Marketing for the Seasons

Many holidays have evolved strong visual aspects that serve as consumption indicators. Because customers have been exposed to them each year their whole lives, the bright yellows and reds for Diwali, the blue colours and charming creatures of

Easter, an array of multiple colours for Holi, and the warm, home-and-family-themed symbols of Christmas all resound within their memories. By promoting appropriate products at the proper time of year, visual merchandising may reap the benefits of this familiarity, connecting visual cues to consumers' receptive minds.

### Staging

The art of staging is the process of presenting an item in a visually pleasing manner. This is often done physically by installing extra lighting to enhance the appeal of an indoor exhibit. The most prominent example of staging is in television advertisements, where things are idealised to excellence in a way that does not exist in the actual world. Staging is most commonly used for high-end purchases like jewels or automobiles. Consumers that value the shopping experience as much as the products respond well to staging since it enhances their enjoyment of purchasing something.

### Novelty

While common motifs and triggers are vital for enticing customers to buy, maintaining a sense of freshness in the shopping landscape is also beneficial. New items or arrangements will pique the interest of customers who visit a place on a frequent basis. Many clients will respond with newfound enthusiasm even if a store's layout design is updated despite offering the same products. When new products are launched, they should be highlighted by placing them in front of the store on a prominent display. Customers will be unable to miss them as they enter the store, resulting in increased sales.

## **1.2 Problem Statement**

Visual Merchandising is a key component of brand promotions. In India, this technique has been effectively utilised by large FMCG companies like Hindustan Unilever, Dabur, Nestle etc. for the past decades. However, it is still an unexplored arena for upcoming start-ups and other brands. In addition to this, maximum research done on this subject is focussed on visual merchandising in supermarkets.

This raises the pressing concern that when approximately 70% of Indian population lives in rural India, why are current and upcoming brands not exploiting the opportunity to create a Brand for India? Further, no study till date has addressed how visual merchandising takes place in the Tier II and Tier III cities of India.

With this foundation, the problem statement of this research is to identify themes in current visual merchandising done by brands in Tier II and Tier III cities of India and propose a conceptual framework on this subject.

## **1.3 Objectives**

The research paper attempts to achieve the following key objectives:

- To present a Thematic Analysis of current Visual Merchandising techniques deployed by brands in Kirana Stores of Tier II and Tier III cities
- To propose a Conceptual Framework that consolidates the thematic understanding and is a ready reference for companies and researchers who are keen to analyse this topic.

## **1.4 Scope of this Study**

The scope of this study is limited to Kirana Stores in Tier II and Tier III cities of India. Further, this study focusses on Visual Merchandising as a technique of Brand Promotions and does not take into account other factors such as rural specific product development, rural event marketing etc. The results of this research are generalizable to all rural states of India.

## CHAPTER 2: LITERATURE REVIEW

### Branding

According to the American Marketing Association (AMA), a *brand* is 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.”. This implies that most of the products and services that we use today are a brand as they have a combination of these elements. According 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 over time. It is now seen as a method of creating awareness, reputation, and prominence in marketplace. According to Lisa Buyer, a “brand is created and influenced by people, visuals, culture, style, perception, words, messages, PR, opinions, news media and especially social media. It is nurtured, developed and recreated over time”. Similarly, Heidi Cohen defines branding as shorthand marketing messages that create emotional bonds with consumers. This in turn creates a perceived value in the minds of consumers.

### History of Branding

Though branding as a concept is constantly evolving, its origins can be traced to centuries ago. Adrian Room in his research “History of Branding” (1998) describes how this theme was of extreme importance in the early Greek and Roman civilizations. He explains how Romans used pictorial representations and names for branding and selling their products. For eg: A butcher would show a picture of hams to signify what the shop is for. (See figure 1)



*Fig 2.1 Early Methods of Branding, Source: Research on History of Branding (1998)*



According to Wilson Bastos and Sidney J. Levy (2012), branding is both a sign and symbol that dwells from desire to create an identity and be recognized. Their paper “A history of the concept of branding: practice and theory” talks about the origins of the concept of branding and how it has evolved over time. They highlighted that in the past there were also negative connotations associated with branding. Specially, in terms of branding of slaves, prisoners, and animals. The brander was considered superior to the branded. Moving further, branding emerged as an integral part of marketing in the twentieth century. Apart from salesmanship and advertising, trademarks became synonymous with brands at that point of time. And today, it has become essential that branding exercise is interdisciplinary.

### **Elements of Branding**

Brand elements refer to characteristics that define a product and distinguish it from others. According to the AMA definition, these can be name, term, sign, symbol or design. Mosarrat Farhana in the research “Brand Elements Lead to Brand Equity: Differentiate or Die” describes the importance of these elements in building a brand. According to the author, these elements not only create brand awareness but also help in the formation of positive and unique brand associations.

The first and the most important brand element is Brand Name. It is the core base on which the brand and its equity is built. It’s more than a word for the target audience. If effective, it can be registered in their minds in few seconds. Also, according to Robertson and Keller, the brand name should be easy to understand, pronounce, spell, be meaningful and distinctive. For eg – Head & Shoulders shampoo and Closeup toothpaste.

The next major elements are Logos and Symbols. These are the visuals that a customer can associate with the brand. Both functions of branding i.e., identification and differentiation can be effectively done using these visual representations. Some logos convey the brand names while others show what the brand is for. A great example of a good logo is that of McDonalds. Kids, who can’t even read properly can identify it from afar.

Another interesting element is Characters. Some companies use animated characters or cartoons or animals in association with their brands. In India, Amul and Indian Railways have used characters that have become very popular. 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.

### **Importance of Branding**

Joseph Arthur Rooney in his research "Branding: a trend for today and tomorrow" (1995), highlights the importance of branding for a business as well as challenges that they may face while creating a brand strategy. For ensuring branding success, it's important to choose the right name, right advertising and relevant strategies and techniques.

While technologies are advancing, the world is becoming more and more interconnected and evolved, so is case for branding. Vanitha Swaminathan, Alina Sorescu et. al. in their research "Branding in a Hyperconnected World Refocusing Theories and Rethinking Boundaries" (2020) focus on this evolving aspect of branding. They highlight the fact that branding is now a product of shared ownership among all the stakeholders of a brand, making it a two-way channel. The branding landscape today includes not only the branding exercise for a product or service, but it also refers to branding of ideas, people, and platforms.

## **The Rural India**

According to the Indian census, a rural region is defined as "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." In India, there are about 6.4 lakh villages, yet only 20,000 have a population of more than 5000 people. Rural market is defined by most fast-moving consumer goods (FMCG) businesses as any place with a population of less than 2,000 people.

With 162 million households, rural India accounts for over 70% of the country's population (according to 2011 census). According to the Rural Marketing Association of India (RMAI), rural, small-town, and semi-urban economies account for over 60% of India's income. 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, expanding rural income, changing wants and lifestyles, life cycle benefits, and other factors all influence the breadth of rural marketing. Apart from that, businesses are attempting to expand their reach into neglected markets, fulfil the growing demand for long-term organisational activities, and improve their corporate image through CSR operations. Businesses have been rethinking their business models and shifting their motivations away from commercial to social.

According to a recent study by Nielsen, consumption of branded consumer products has grown in villages. During the quarter ended September 2021, rural consumption of FMCG products increased by 58 percent year on year. Simultaneously, non-farm segments account for a large portion of rural income. Many companies are benefiting from growing rural consumption as non-farm sector income rises. This growth story is most obvious in states like Punjab, Haryana, and others, where agriculture plays a big role.

## **Visual Merchandising**

Visual merchandising deals with how a product or brand is visually communicated to the buyer, as well as whether this message is interpreted "appropriately" - in this case, influencing a good psychological or behavioural response, ultimately leading to purchase (Kerfoot, Davies & Ward, 2003). Visual merchandising, according to Ebster & Garaus (2011), is the art and science of presenting things in the most visually appealing way possible, emphasising consumer contact through visuals and presentations. Visual merchandising, according to Law, Wong, and Yip (2012), is a tool for conveying a message about items to purchasers through the use of distinct visual styles and themes.

The impact of visual merchandising on buyer impulse purchase behaviour was investigated by Mehta and Chugan (2012). In his study, it was discovered that window decoration has a direct link to impulse buying. However, while there is no significant link between form display and impulse buying, there is a strong link between floor merchandising and impulse purchase.

According to Theodoridis & Chatzipanagiotou (2009), the ambience of the store environment is produced by combining a number of visual elements from the physical store environment, like colours and decoration elements. As a result, they consider visual merchandising as a factor of the store atmosphere by distinguishing elements that influence buyers' behaviour, which they call visual merchandising elements. Paintings, images, signage, references, and other visual ambience aspects are considered by Pajuodis (2005). Ambient variables (lighting, aroma, music), design factors (layout and assortment), and social factors make up the retail environment, according to Mohan, Sivakumaran, and Sharma (2013).

As a result, following these writers, one can see that store design, atmosphere, and merchandising are all elements that affect the retail environment; yet, one may differentiate visual aspects of these characteristics that could be grouped together as visual merchandising.

## **Kirana Stores**

In a report released by Accenture in 2020 on transformation of Kirana Stores, the criticality of a Kirana Store during the COVID era has been highlighted. The report stresses on the information powerhouse that a neighbourhood Kirana store can be. Despite dependence on human memory, a Kirana Store owner remembers the preferences of its customers. Further, they are quick to make arrangements for festive requirements. 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 emphasises on the need to incorporate retail best practices by Kirana Stores. For instance, categorisation of products on the basis of impulse, convenience etc. can contribute to modernisation of Kirana Stores

Sinha et al. (2015) stated that more than 75% of Kirana stores in India are smaller than 500 ft<sup>2</sup>. The research commented on the wide variety that a Kirana Store offers, as compared to a mom n pop store. Kirana Stores have inventory of 1000 to 8000 Stock Keeping Units (SKU's) with renowned national and regional brands, which comprise of a majority of their offerings. The leading brands service the Kirana Stores every 3 days in an effort to reduce stocking requirements and improve return on investment. The research studied the synergies between online retail and Kirana Stores. It suggested that Kirana stores have the potential to become pick up points for online orders. It also proposed that Kirana Stores can equip themselves technologically and directly take orders from mobile based platforms.

On one hand, there are the organised merchants who are rapidly expanding into the grocery industry and raising alarms on Kirana Store Owners livelihoods; on the other hand, there are the highly value based customers who force market players to operate on narrow margins. As Sanghvi (2007) correctly points out, retailers that have previously concentrated solely on supply-side efficiencies must now include demand-side efficacy in order to maximise corporate performance.

## **Retail Branding**

In the introduction to a special issue on retail brands in the Review of Industrial Organization, Scott-Morton and Zettelmeyer (2004) write that store brands intrigue both marketers and industrial institutional economists because they involve issues of competition among retailers and between retailers and manufacturers. Much of the current work on retail brands is based on these horizontal and vertical qualities, which allow earlier research to be examined using a simple stakeholder (consumer, retailer, supplier) paradigm.

In a special edition of the Journal of Retailing published in 2004, the evolving perspective of the retail brand as more than just a product brand was examined. Ailawadi and Keller (2004) acknowledge a broader concept of branding in commerce in their position paper outlining the problem. They acknowledge that retailer brands are significantly more multi-sensory than product brands, and they specifically address the relationship between retail image and retail image. They claim that retail brand equity is built on customers' perceptions of the retailer, rather than the private brand, which is relegated to a minor (though important) component of the retailer's brand portfolio.

This point of view has an intuitively easy logic to it. Consumers are increasingly treating fragmented private brand ranges as an alternate brand (rather than an alternative product) to the manufacturers' brand on offer, implying that consumers trust these product lines. One of the benefits of branding is that it enables customers to identify their preferences and save money on searches. As a result, the retail brand name and the retail environment in which it is sold probably facilitate identification and recognition, as well as represent a level of confidence that encourages repeat purchases.

Steiner (2004) presents an interesting historical backdrop for national and private brand competition, citing Braithwaite's work from the late 1920s. She found that the price difference between leading marketed national brands as well as unadvertised national brands & private labels was driven more by advertising and reputation than by quality. Although private brands were less expensive, they "do not eliminate reputation entirely as a marketing component, for the reputation of these enormous

stores is one of the mechanisms by which they are able to achieve volume and velocity of turnover" (Braithwaite, 1928 in Steiner, 2004).

As the concept of retail brands has evolved to include the shop as well as the product, various academics have looked at the relationship between the two, though the linkages between brands with store image are multi-faceted and multi-dimensional, as Jacoby and Mazursky (1984) point out. The store image impacts the product brand for some, while the product brand promotes the store image for others. Several papers published in the mid-1990s from the Dick et al. (1995) research showed that store image was an important determinant of store brand quality, that perceptions of the physical environment, merchandise, and service quality were important cues in assessing store brands, and that store artistry aided the creation of store brand quality perceptions. (Richardson et al., 1996a).

This evolution of the retail brand notion leads us into the realm of corporate branding. Martenson (2007) describes corporate identity as store image with yet another attempt to explain the causes of pleasure and loyalty in retailing. Although she concluded that the store as a brand is the most essential aspect for customers, and that "retailers must be competent at retailing," she also raises an essential theme regarding the holistic nature of retail branding. "It is expected that a consistent appearance and feel that matches the corporate brand's principles will have a favourable impact on store brands bearing the corporate name."

## **Branding for Rural India**

The rural markets of India have become an attractive place for most of the major brands to increase their penetration. Since the green revolution and the outreach of television and internet, consumer behaviour in these areas has changed a lot. This has led to rural markets becoming an important and integrated part of marketing and branding strategies. The research by Piali Haldar on “Modern Rural Marketing Network” (2015) describes how manufacturers and retailers have been at the forefront in the transformation of rural markets. By conducting exploratory research, the author uses the case studies of companies like “Warana Bazar, ITC Choupal Sagar, Godrej Aadhaar, DCSL Hariyali Bazaar and Mahindra & Mahindra's Subh Labh” to show how these early movers infiltrated the Indian rural market and what kind of marketing strategies they adopted.

Dr. Ashish Gupta in his research “Rural Retail Revolution: The Rise of Rural Market” has also highlighted the phenomenon of “Rural Retailing”. Within this concept, the study delved on the importance of rural retailers and shared the challenges and opportunities in this sector. As a fact, rural retailers contribute to over 35% of the purchasing decisions. Combining this with another fact that more than 55% of India still lives in the rural areas, this presents a big opportunity. Some of the challenges stated in this research are traditional outlook, large and scattered areas, low standards of living, low levels of literacy and income, varied languages and dialects, lack of infrastructure and agriculture dependent economy.

To understand this market further, the research by Sandeep Anand and Rajneesh Krishna on the topic “Rural Brand Preference Determinants in India” focused on the consumer preferences. For this, they conducted a survey of over 350 respondents in two Indian states and then applied regression analysis. The results of this research highlighted the fact for companies to gain share in the rural market, particularly in the FMCG sector, they need to brand themselves as high on quality and one that provides value for money. Also, they need to create a connect with the consumers which establishes a sense of belongingness.



Apart from agri based products like seeds and fertilizers, rural markets are a giant opportunity for FMCG products. Steadily over the years, the rural market has become even bigger than the urban markets in this sector. The research by Prof. (Dr.) S. L. Gupta and Arun Mittal, “A Study of Consumer Behavior Aspects and Brand Preferences in Rural India with Reference to FMCG Sector”, focuses on this aspect of rural branding. It highlighted the fact that for branding, a well-planned and sensitive communication campaign is a must. It not only increases top of the mind recall value but also builds brand loyalty. Another important factor highlighted here is the association of family values with brand identity.

## **CHAPTER 3: RESEARCH METHODOLOGY**

### **Exploratory Research Design**

This research is an Exploratory Research. Exploratory research is suitable when the topic of study is new, data is difficult to collect and the research intends to provide a foundation for future studies. Due to limited research conducted on Kirana Stores of Tier II and Tier III cities, this research paper is an Exploratory Study in this field.

### **Qualitative in Nature**

The research methodology deployed in this research paper is Qualitative Research. In the famous book Marketing Research by Naresh Malhotra, qualitative research is defined as “an unstructured, exploratory research methodology based on small samples that provides insights and understanding of the problem setting.” Qualitative research includes evaluation of non-quantifiable data. For the purpose of this research, photographs of Kirana Stores obtained through Google Maps are analysed.

### **Based on Inductive Reasoning**

This research is an Inductive Reasoning based research under qualitative research. In Inductive Reasoning, the research travels from specific to generalisable insights. Thus, from a number of individual observations, a general conclusion is drawn.

### **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

In this research, the chosen method is Ethnography. “Ethnographic research takes a cultural lens to the study of people’s lives within their communities” (Hammersley and Atkinson, 2007; Fetterman, 2010). The objective of the research fits well with the non-intervening nature of Ethnography research and the culturally relevant insights it delivers.

The specific technique of conducting this research is Visual Ethnography. Sarah Pink in her book *Doing Visual Ethnography* describes the technique as an “invitation to engage with images, technologies and ways of seeing and experiencing as part of the ethnographic process”. Visual Ethnography involves the study of pictures in their natural environment, free of any external intervention. In this study, pictures were collected from Google Maps, which were self-uploaded by the Kirana shop owner.

#### Thematic Analysis

To analyse pictures and data points obtained from them, a Thematic Analysis will be conducted which will look for recurring themes in data set.

#### Analysis through Framework

The themes identified are analysed through Framework Method. “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.” As suggested by Nicola K Gale et.al in their research published in 2013.

#### Validation by Subject Matter Expert

To ensure validity of findings and their applicability, the research findings were approved by a Subject Matter Expert. In this research, two Kirana Shop owners from Delhi city in India, have testified the findings and approved of their applicability.

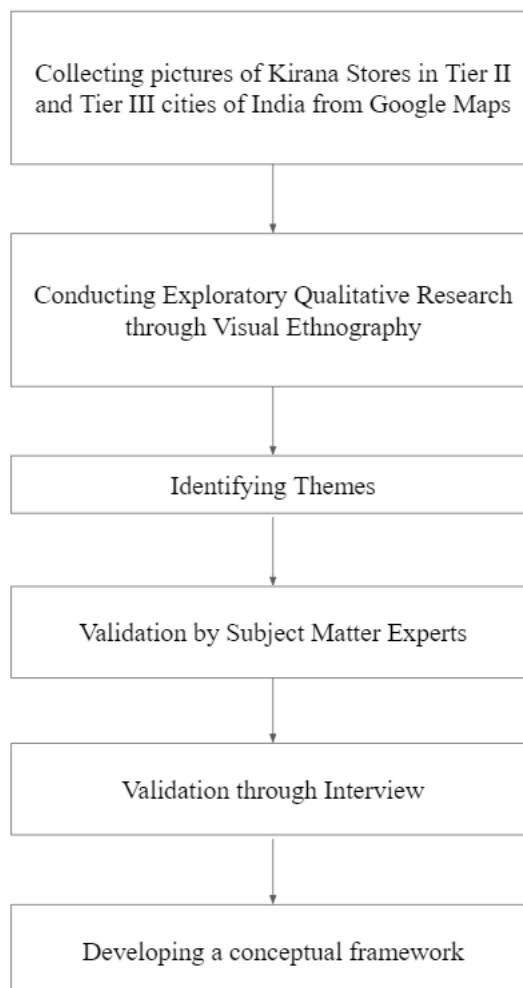
### Validation through Interviews

Further, Telephonic Interviews were conducted among 12 participants belonging from Tier II and Tier III cities. The purpose of interview was to Validate the themes identified and seek suggestions.

### Developing a Conceptual Framework

On the basis of the identified themes, a conceptual framework is developed which summarises the key takeaways of the analysis. This conceptual framework has application in Brand Building and Visual Merchandising through Kirana Stores

The Research Framework can be summarised as follows:

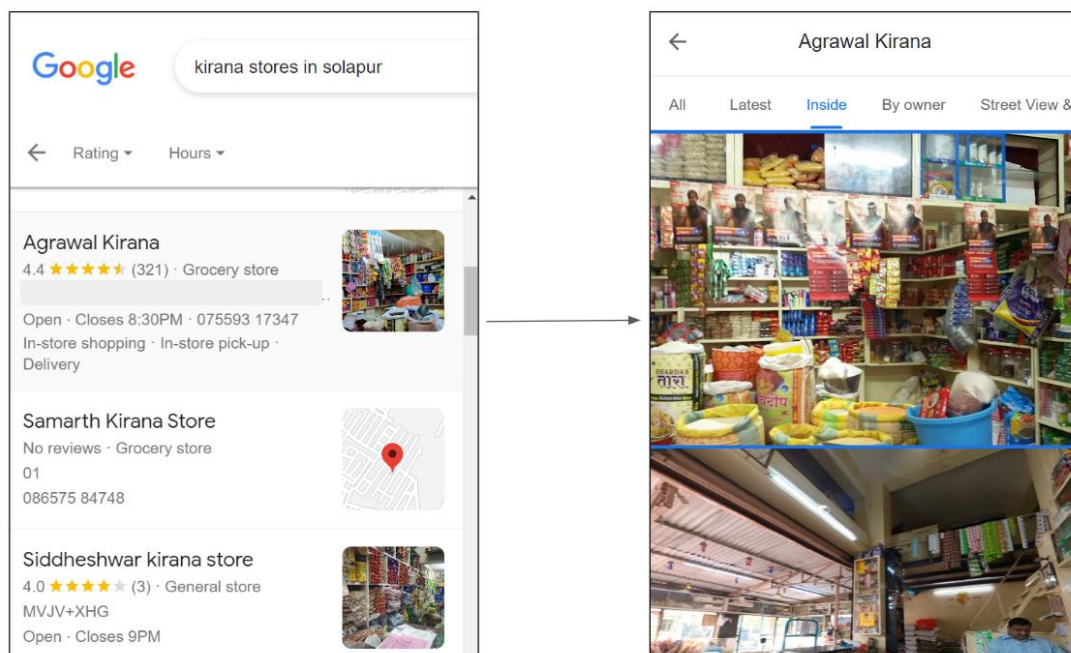


*Fig 3.1 Research Framework, Source: Own Analysis*

## CHAPTER 4: ANALYSIS, FINDINGS AND RECOMMENDATIONS

### 4.1 Data Collection

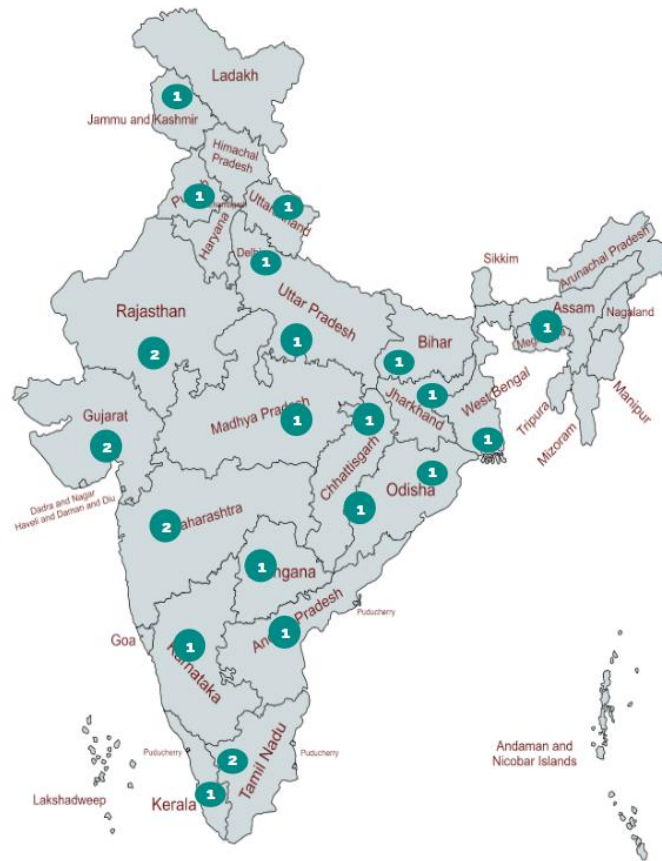
- The source of data in this research is Google Maps
- 256 pictures of Kirana Stores have been captured for the purpose of this research. The period of this study is February 2022 to April 2022.
- Stratified Random Sampling Method which is common in geographical research has been applied in this research. 6 cities from each strata of North, East, West and South have been studied from a total sample of 24 cities.
- The below image is representative of how data has been collected:



*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.



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

The above graph indicates state wise distribution of cities analysed.

Particulars	Number
Number of stores analysed	65
Total number of Tier II and Tier III cities covered	24
Number of Pictures analysed	256
Average Store Rating	4.1

*Table 4.1: Descriptive Metrics, Source: Own Analysis*

The above table summarises key data collection metrics.

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

### Theme 1: Brand Taping

Brand taping is a frequently occurring phenomenon to demarcate the boundaries of a particular brand products within the Kirana Store. It helps in creating a visual distinction from rest of the categories of the store. The customised taping is especially useful in vertical assortment of products. As products are organised within rectangular boxes, the boundary space is utilised to paste Brand Tapes which highlight a particular product or group of products. The following visual instances from data depict its usage:

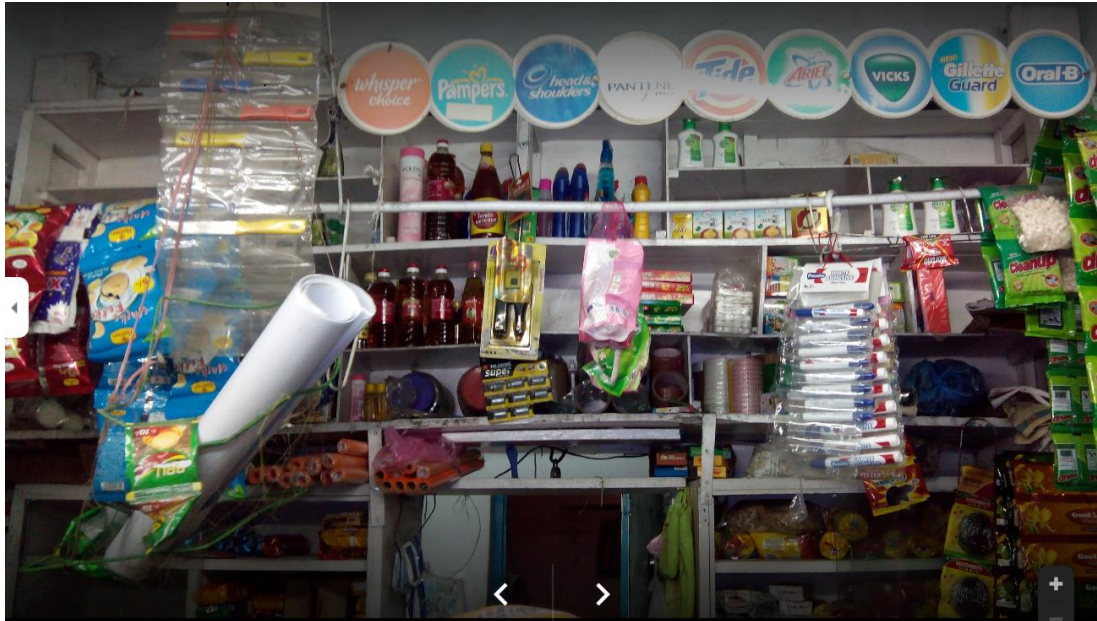


*Fig 4.3: Brand Taping, Source: Google Maps*

### Theme 2: Brand Garlands

A popular method used by Hindustan Unilever is the use of Brand Garlands. A Brand Garland is a circular chain of Logos of company products that showcase its wide variety of brands offered on the store. The Brand Garland is usually made of paper and is pasted on the top of the store front. It is visible from a distance and asserts the brand presence in an uncluttered manner. The Brand Garland technique is also used by Ice-Cream companies to display the range of flavours being offered at a store.





*Fig 4.4: Brand Garland, Source: Google Maps*

### Theme 3: Brand Hangers

A Kirana Store is much smaller in space than a supermarket. There is little space and more products. Therefore, to accommodate more products in the store, Hangers come in handy. These hangers are given to store owners by respective brands to overcome space issues and make their brand stand out from the crowd of products. The display of products using hanger is a theme of both utility and publicity.



*Fig 4.5: Brand Hanger, Source: Google Maps*



#### Theme 4: Store Front Branding

The space outside the store is best utilised to put large cardboard-based brand promotional items. The large cut outs are visible to those passing by the store. This space is also utilised to set up small kiosks where games or lucky draws for the specific product are being organised. Store Front Branding requires more safety measures as stealing products is easier in this. However, for announcing a grand presence or a new product launch, it is a good place to begin with.



*Fig 4.6: Store Front Branding, Source: Google Maps*

#### Theme 5: Kirana Name Banner

The name of the Kirana store written on the banner. This is the most frequently utilised space by companies like Kwallity Walls, Coca Cola, Fortune Oil, Tops etc. This prominent space in Kirana Stores depicts the Brand Name and their range of offerings. It may sometimes showcase only the Brand Name and a celebrity picture along with it, like in the case of Coca Cola. It is observed that in South India, this theme is not very popular, however in the North, East and Western regions, it is a common occurring.



*Fig 4.7: Kirana Banner, Source: Google Maps*

#### Theme 6: Bill Desk Branding

The final point of sale is the billing desk. The billing desk table space is used to paste a large promotional sheet, fitting to the size of the desk. It is a considerably large space given the entire Kirana store is small in size. This area is prone to wear and tear. New Age payment companies like PayTM and PhonePe have become a growing essential item on the bill desk. Companies paste promotional material on the lower section of the bill desk or place their items on the centre of the table. The idea is to grab eyeballs as the customer exits the store.



*Fig 4.8: Bill Desk, Source: Google Maps*

### Theme 7: Unified Brand Family

A style dominantly used by Nestle in its pan India visual merchandising strategy is keeping all Nestle products together. It is observed that all products from this product are on one single shelf. Such a strategy exerts market dominance and helps in introducing new brands from the house of brands. In this theme, the most prominent product of the brand is highlighted and other products are kept surrounding the major product for effective visual messaging.



*Fig 4.9: Nestle Family Branding, Source: Google Maps*

### Theme 8: Stacking Pyramid

Another style of making a brand stand out of the crowd is creating a stacked pyramid. It creates a uniform look in product presentation and attracts customers easily. Stacking Pyramid is functional for those products which can be kept on top of each other without any breakage. Its utility is higher when Kirana Store customers can visit the inside of the store. This style is useful in out of the store branding as well.





*Fig 4.10: Ariel Stack Pyramid, Source: Google Maps*

#### Theme 9: Colour Coding

Brands like Cadbury, which hold a high brand recall, colour code their products and provide necessary infrastructure to Kirana Stores for keeping their products. It helps strengthen brand recognition and add to the popularity of their offerings.

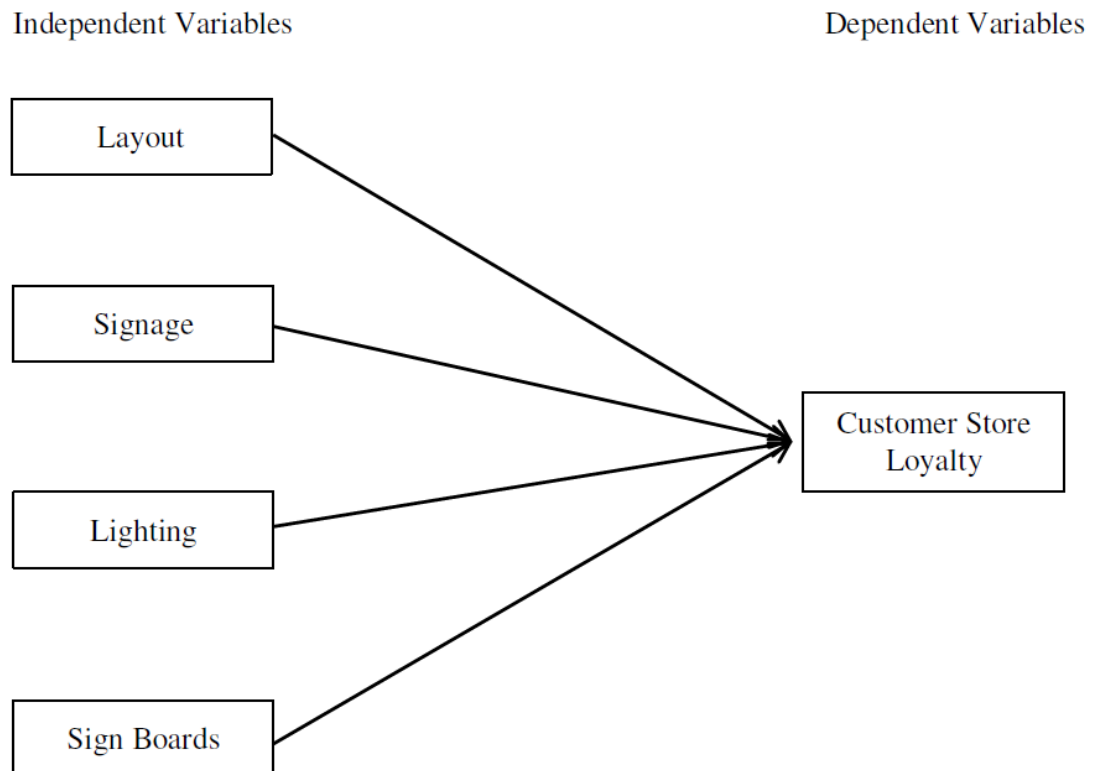


*Fig 4.11: Cadbury Purple Colour, Source: Google Maps*

### Analysis using Framework Method

Thilina Dk and Nomesha Liyanage in their research paper “The Impact of Physical Evidences on Customer Store Loyalty with Special Reference to Supermarket Industry in Sri Lanka” have developed a framework which described four physical elements that have an impact on customer store loyalty in supermarket environment.

The framework is as follows:



*Fig 4.12: Elements of Store Loyalty, Source: Thilina et.al, Research Paper*

#### Layout

A good store layout is a convenience for both customers and store employees. It helps in grouping similar items together so that it is easy for the customer to spot and assists the shopkeeper in servicing. For eg- Lifestyle stores across India follow the layout of having men's and women's sections on separate floors.

## Signage

Signages help customers easily navigate the stores and find what they need. Apart from section signages, sometimes stores also indicate the amount of waiting time at billing counters. Some stores also use signages to indicate the washroom area, and entry and exit points.

## Lighting

Light creates the ambiance of the store and also helps in conveying the required vibe. For eg- At the time of Diwali in India, most stores use yellow hanging lights in, around, and outside the store to give happy and festive vibes.

## Signboard

Signboards are an important element of famous local stores. Some stores use signboards on the way leading to the store to indicate its presence as well as route directions. Others use signboards outside to indicate ongoing offers or special items of the day.

We have judged our 256 photographs along the following criteria and observed the following characteristics of Kirana Stores:

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*

From the above analysis, we can infer that:

1. Visual Merchandising should be done in a manner that it best fits the Grid Layout Structure.

2. Persuasive style of signage can be explored by brands to boost brand promotions.
3. 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.
4. Signboard 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.



## Validation by Subject Matter Experts

The themes identified in this section have been reviewed by Subject Matter Experts or Kirana Store Owners.

Two Kirana Store owners have been selected from Delhi NCR region of India on the basis of convenience sampling. Upon explaining the research intent and methodology, the themes were presented in the local language Hindi to the store owners. They have found the themes to be relevant and practically applicable.

The following images are a testimony to the in-person visit conducted on 30<sup>th</sup> May 2022:



Fig 4.13: Validation by SME Image 1, Source: Own Analysis





*Fig 4.14: Validation by SME Image 2, Source: Own Analysis*

## **Validation through Interviews**

Telephonic interviews were conducted with 12 participants to validate the themes identified in this research. The participants belonged to Tier II and Tier III cities of India, namely: -

1. Jammu
2. Patna
3. Meerut
4. Kanpur
5. Pune
6. Kozhikode

During the interview, the following 3 Questions were asked?

1. Do you find the themes identified relevant in your city?
2. Do you think the themes identified are generalisable to Tier II and Tier III cities of India?
3. Is there any other suggestion that you would like to make?

All the participants responded positively to Question 1 and Question 2.

Five participants shared their suggestions in Question 3. They are as follows: -

1. A Rack of Chips

The respondent conveyed an observation that there is usually a rack of chips which is highlighted at the store entrance for easy pickup. The exact suggestion is as follows:

“Sometimes I go to Kirana store to grab a packet of chips and I pick it up straight from the rack. That rack has a branding of Kurkure or Lays mostly”

2. Namkeen and Masala Sachets

It was observed by a respondent that the most striking feature of a Kirana Stores is the number of sachets of namkeen and masala packs that are hanging upfront. To quote the exact words, it was said that:

“I know I am standing at a Kirana Store and not a supermarket when there is a range of Namkeen and Masala packs hanging - from Lehar namkeen to

Maggie Masala. Sometimes I want to buy a sachet product and I specially go to a Kirana store only to get one”

### 3. Pepsi and Coca Cola Refrigerator

Another respondent shared his experience of finding a Pepsi or Coca Cola refrigerator every time he goes to a Kirana Store. To quote his exact words: “I noticed that Kirana Stores refrigerators are full of brand promotions of Pepsi and Coca Cola. Rarely I have found that place to be empty”

### 4. Toffee payment system

A respondent shared her fond childhood memory of getting paid change in toffees. She recounts her experience cherishingly and seems to prefer that mode of payment. In her words, she said:

“I remember shopping from a Kirana Store specially to get a Coffey Bite. For five rupees change I was getting 10 Coffy bites. I really liked going to that store because of the idea of getting some toffees. It is still my favourite toffee”

### 5. Stock Availability Issues

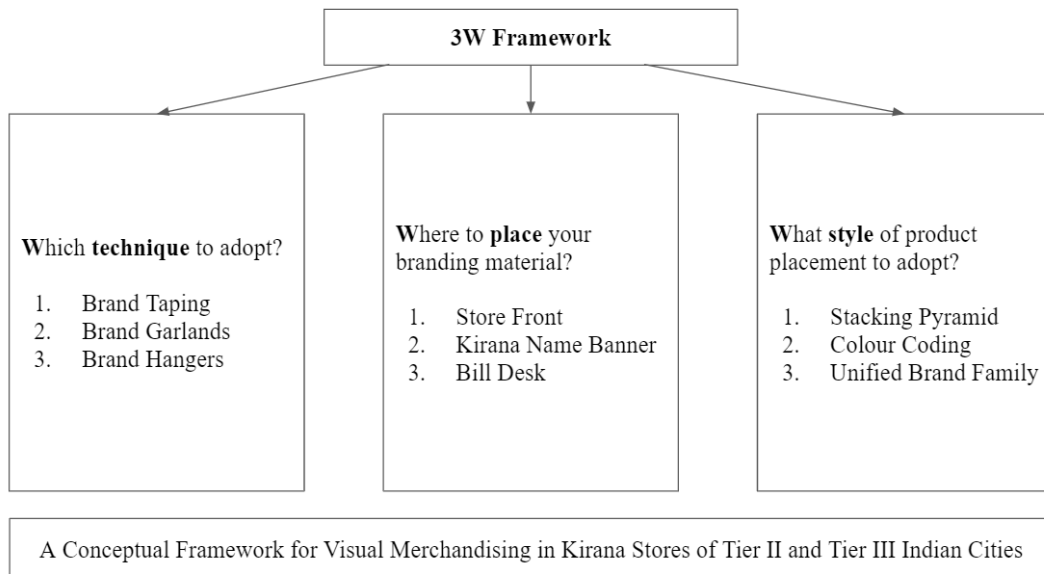
One of the respondents shared that Kirana Stores were go to places for emergency needs. He further added that the store did not always have a particular brand so he had to adjust on the basis on stock availability. To quote the exact words, he said:

“It happens that my maid informs me to buy washing powder and I end up delaying it to the last moment. When I rush to nearby Kirana Store, bhaiyya does not always have Surf Excel. I have to adjust for Rin or Nirma, whichever is available”

Thus, the interview findings validated the identified themes and added personal experiences of respondents with Kirana Stores.

### 4.3 Findings and Recommendation

By grouping the themes analysed in the previous section, a conceptual framework is prepared. It summarises the key visual merchandising methods at Kirana Stores in Tier II and Tier III cities.



*Fig 4.15: 3W Framework, Source: Own Analysis*

#### Users of this Framework:

1. Existing Brands who want to make their presence felt in the rural market through Kirana Stores.
2. Upcoming Start Ups who are searching for methods to promote their brands in rural India
3. Researchers in the field of marketing who want to analyse rural India brand promotion strategies or want to pursue their research on Kirana Stores in India
4. Students of MBA, BBA and any other field, who are keen to learn about the research topic.

## **Recommendations**

The research so far has focused on what all methods have currently been adopted by brands to build their presence in rural India through Kirana Stores. In this section, recommendations are made on the basis of white spaces in brand promotions that have been identified through pictures. Below are the recommendations which can be adopted by brands in future:

1. **Provide Branded Carry Bags**

Shoppers at Kirana stores sometimes forget their carry bags at home or expect the store owner to provide one. By placing carry bags with brand logo at the payment counter, one can maximise on their brand awareness. The carry bag will be visible to all and will be taken home by a customer, whether or not they purchase a product of the given brand.

2. **Highlight the local offering in Brand Communication**

Shoppers visit neighbourhood Kirana Stores with an idea that they will be able to spot local products. If there is an established brand or a budding brand, they can curate their packaging communication in a way that it highlights the local offering. For e.g.- Muga Silk is native to Assam. A brand promotional message from a detergent company can sound like – “Your clothes will shine brighter than Muga, with our detergent Nirma”

3. **Promotions on Weighing Scale**

Weighing scale can potentially carry messaging which instils trust in a brand. For example – Savlon runs a campaign by the hashtag #BharosaMaaSa. This sticker can be pasted on a weighing scale where the consumer is likely to have trust issues.

4. Create Instagram Worthy Visual Appeal

With the rise of social media apps, every place is a place that is worthy of a catchy snap. The Kirana Store is one of the places tourists visit to get necessary goods that they run out of during the trip. To make this moment Instagram Worthy, brands can place cardboard caricatures within the store which serve the dual purpose of photo booth and brand awareness.

5. Placing your Brand message at the back of the Chair

It is observed that Kirana Store owners are usually standing on days when customer footfall is high. Therefore, the back of the chair can be used to place messages like – “rest your faith in us” or any other creative copywriting that can catch the eye of the customer.

#### **4.4 Limitations of this Research**

This research paper is subject to the following limitations:

1. Lack of consistency in data collection due to photographs being clicked and uploaded by the Kirana Store owner himself/herself.
2. Low Quality images that are not easily comprehensible
3. Lack of sufficient literature review done in the field of Kirana Stores in India

## **CHAPTER 5: CONCLUSION**

With competition getting fiercer on the shelf space, it has become increasingly pivotal to identify places and techniques where one can position their brand for effective visibility. Rural India has the potential to be the next battleground in the retail industry and Kirana Stores will be at the forefront of this battle.

Through exploratory study, this research yields insights into Visual Merchandising of Kirana Stores in India. A thematic analysis has revealed patterns like Brand Taping, Brand Garlands, Colour Coding and other recurring phenomenon's in Kirana Stores of India. Further, the proposed conceptual framework answers the questions pertaining to the techniques of visual merchandising, how to place your products and the style of placing one's products.

The implications of this research are multiple for relevant stakeholders. Companies can find direct take aways on positioning their brands effectively, researchers can find new dimensions in branding through Kirana Stores, students can quench their curiosity on Visual Merchandising in Kirana Stores of India. Overall, it is a valuable study in the subject of retail branding and visual merchandising.

Future research on this subject may include comparisons of supermarkets and Kirana based visual merchandising, analysis of the degree of impact that each technique is able to create in the minds of the consumer and any other related dimension that the researcher would like to add and experiment.



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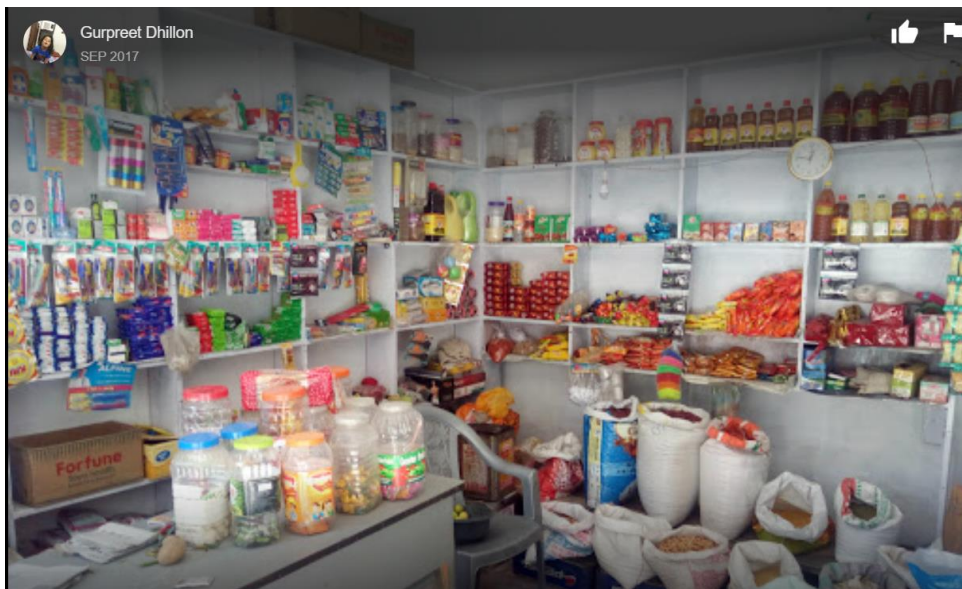
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Due credit is given to Google LLC and the shop owners who have uploaded photographs for providing their valuable input in this research.

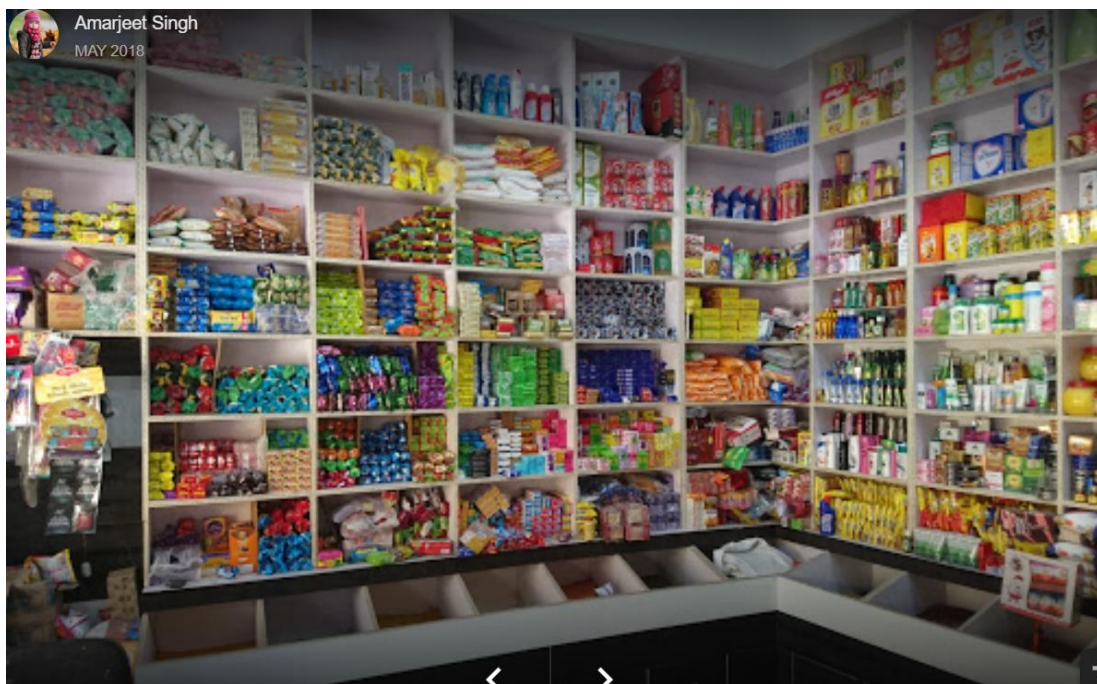
## ANNEXURE

The below pictures are representative of total pictures collected and analysed.

### Kirana Stores in North India



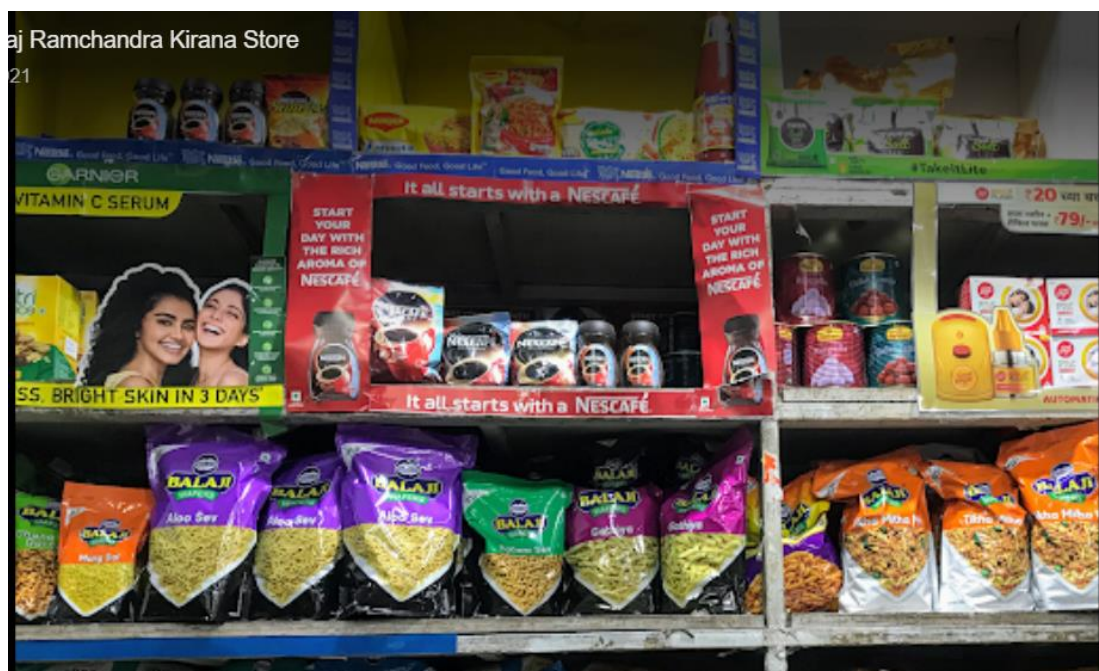
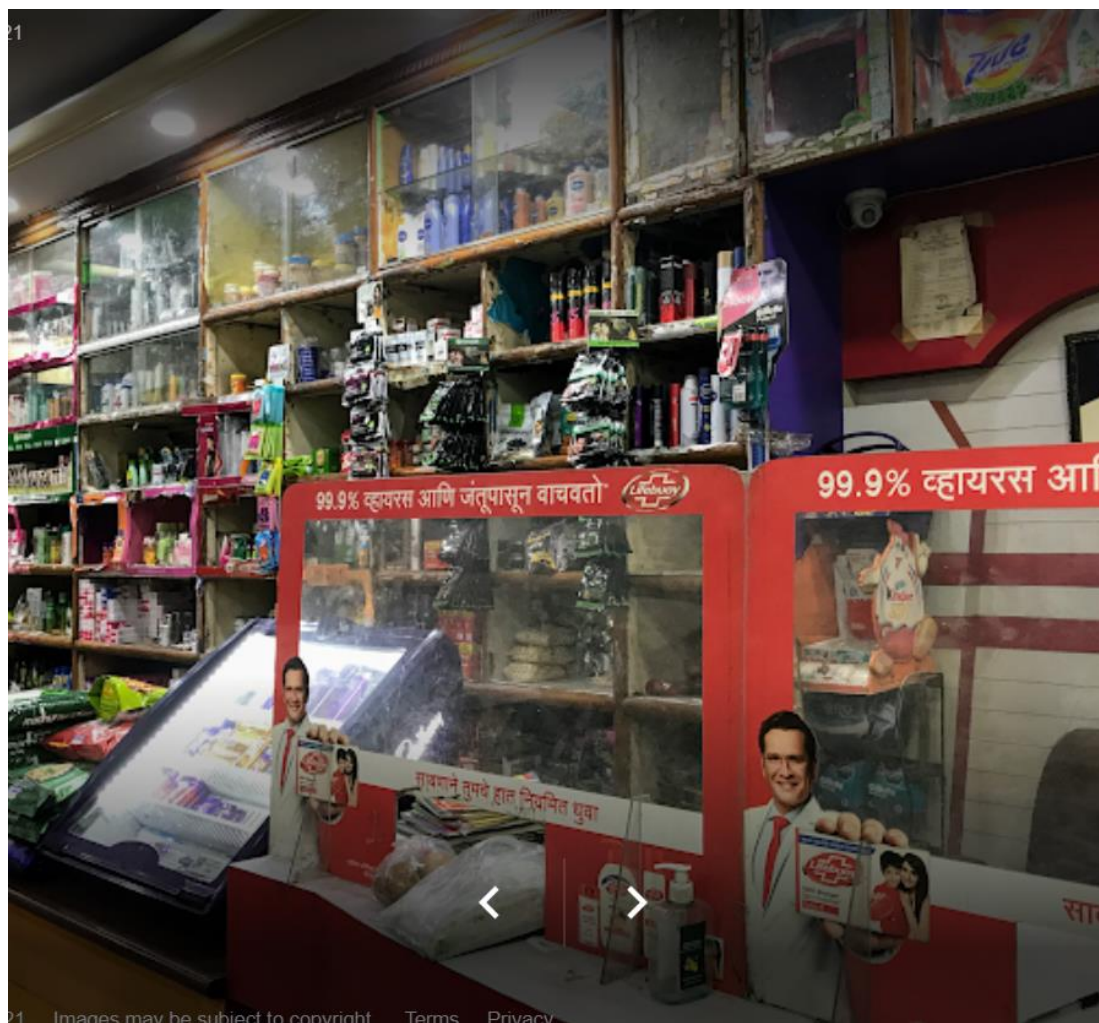




## Kirana Stores in East India

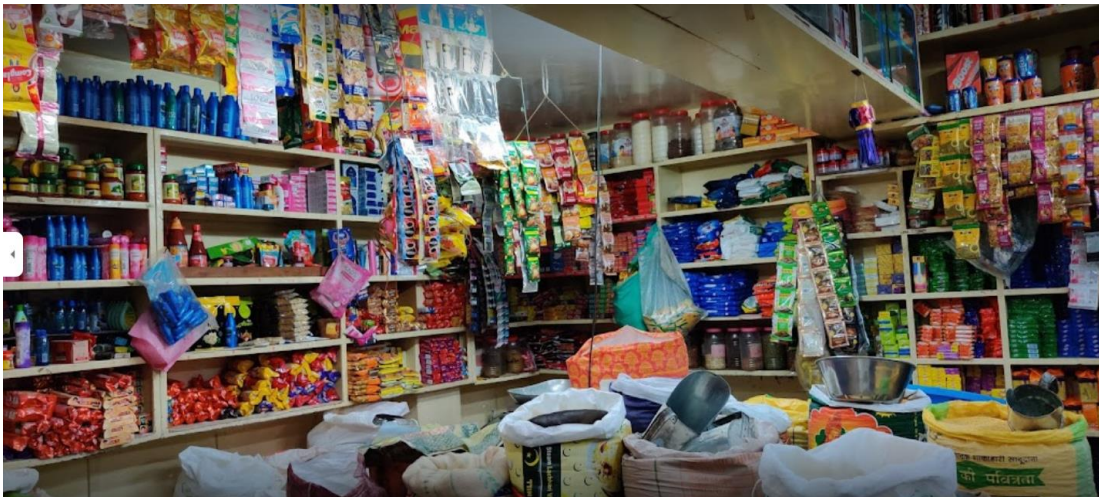




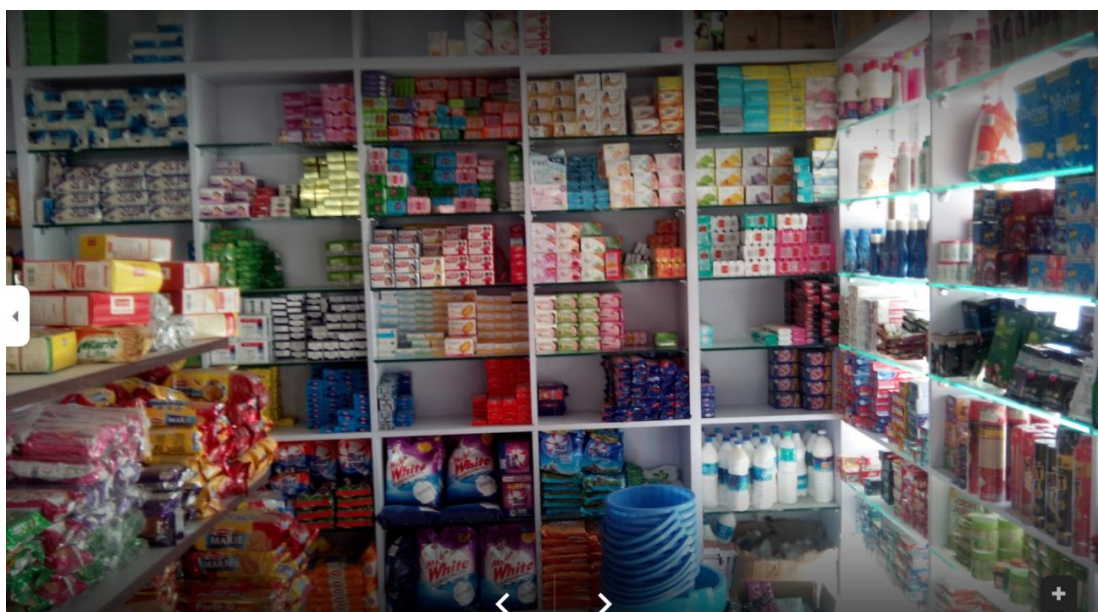




## Kirana Stores in West India







## Kirana Stores in South India

