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From Shelf to Sale: Customer Engagement, In-Store Promotion and Merchandising Execution in Indian Processed-Food FMCG Retail

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Abstract. This study looks at how three point-of-sale levers work together in Indian packaged-food FMCG retail: promoter-led customer engagement, sampling-based promotion and shelf merchandising.

Design/methodology/approach – The work is an embedded participant-observation case study drawn from a two-month on-the-job placement as a brand promoter for a Pune-based food manufacturer. All observations were made in one modern-trade store in Jalgaon, Maharashtra. Structured field records were examined descriptively and covered five promotion days (500 shoppers approached), one peak sales day (134 units across four stock-keeping units), five shelf audits and a log of shopper questions.

Findings – Pooled across the promotion days, 65.0% of approached shoppers heard a product explanation, 41.2% agreed to taste or try the product, and 25.6 units were sold per 100 shoppers approached. Among shoppers who received an explanation, the share who went on to trial barely moved (62.5–65.5%), whereas sales yield ranged from 18.7% to 33.6% and followed how many shoppers the promoter managed to draw into conversation. On the peak day, cheaper SKUs delivered most of the units while expensive SKUs delivered most of the revenue. Shortfalls in eye-level placement, cleanliness and stock appeared together in the same two audits. Shopper questions grouped around how to use a product, whether a pack is good value, whether the ingredients can be trusted and what the product will taste like.

Originality/value – The paper documents a transparent, repeatable field protocol and proposes five propositions about the engagement-to-purchase funnel for a mid-sized regional brand, a context that retail-marketing research seldom covers.

Limitations – The evidence comes from a single outlet and five promotion days without a comparison condition, so the results are exploratory and cannot be generalised.

Keywords: *customer engagement; in-store promotion; product sampling; merchandising; FMCG; point of purchase; India; brand promoter*

1. Introduction

Packaged food is a low-involvement category that shoppers buy often, and in which several near-identical brands compete for attention within a few seconds. India's FMCG market was valued at about US$289 billion in 2025 (IBEF, 2025), and a large portion still reaches consumers through fragmented retail channels in which manufacturers rarely meet the end shopper. For these companies, the final few metres of the value chain, namely the shelf and the exchange that takes place beside it, decide whether earlier spending on advertising and distribution pays off.

Prior research shows that a substantial part of grocery decision-making is shaped or changed once the shopper is inside the store (Inman, Winer, & Ferraro, 2009; Park, Iyer, & Smith, 1989), that the physical presence of a brand on the shelf influences attention and evaluation (Chandon, Hutchinson, Bradlow, & Young, 2009), and that engagement extends beyond the purchase transaction (Brodie, Hollebeek, Jurić, & Ilić, 2011; van Doorn et al., 2010). What remains unclear is how these levers interact within one store when a mid-sized regional brand relies on a human promoter



instead of a national campaign. The existing evidence largely rests on scanner data, laboratory experiments or large multinational firms, and detailed accounts of the working funnel from approach to explanation, trial and purchase are rare, especially for Indian modern-trade outlets.

The present paper responds to this gap. It draws on records maintained during a placement with Nilon's Enterprises Pvt. Ltd., a food manufacturer whose range includes pickles, sauces, spices, pastes and instant mixes. Three research questions guide the analysis. RQ1: How does the promoter-led funnel (approach, explanation, trial, purchase) behave from one promotion day to another? RQ2: How do unit price and pack format shape the split between volume and value on a high-sales day? RQ3: How do merchandising lapses occur together, and what do shoppers' questions reveal about the information barriers a promoter has to clear?

The paper contributes in two ways: a clearly documented field protocol that researchers and practitioners can reproduce, and a set of propositions ready for confirmatory testing.

2. Theoretical Background and Propositions

2.1 The in-store decision setting

In repeat-purchase food categories, shoppers frequently rely on limited, heuristic decision-making (Hoyer, 1984), so the immediate store context carries unusual weight. The time a shopper has available and her familiarity with the store change how much she searches and how receptive she is to unplanned buying (Park et al., 1989), while the characteristics of the category and the shopper together determine how much of the final choice is made at the shelf (Inman et al., 2009). Standard consumer-behaviour textbooks likewise treat the shelf as a communication channel in its own right (Schiffman & Wisenblit, 2019; Kotler & Keller, 2016).

2.2 Engagement as a staged process

Customer engagement has been framed both as a psychological state produced by interactive, co-creative brand experiences (Brodie et al., 2011) and as a set of behaviours that go beyond buying (van Doorn et al., 2010; Pansari & Kumar, 2017). At the shelf, the part of engagement that can be observed is behavioural and sequential. This corresponds closely to the attention–interest–desire–action (AIDA) hierarchy from early selling literature (Strong, 1925), which remains in use for promotion planning (Belch, Belch, & Purani, 2021). In this study the promoter's conversation is treated as the mechanism that carries a shopper from one stage to the next, and the funnel ratios are treated as its measurable result.

2.3 Sampling and personal selling

Sauces and spice blends are experience goods whose taste, aroma and texture cannot be judged from the pack, so a trial lowers the perceived risk of buying. Studies of in-store sampling report a positive effect on purchase of the sampled item (Heilman, Lakishyk, & Radas, 2011), and personal-selling theory stresses communication that adapts to the needs the prospect expresses (Ingram, LaForge, Avila, Schwepker, & Williams, 2020). A promoter therefore uses two tools together: information, through explanation, and experience, through trial.

2.4 Merchandising and visibility

Whether a brand is noticed and considered depends on its shelf presence, which includes facings, position, cleanliness and availability (Chandon et al., 2009; Levy, Weitz, & Grewal, 2019). A product that is out of stock or poorly placed also weakens promotion, because a shopper who has been persuaded cannot act if the item is hard to locate. Merchandising and personal promotion are accordingly expected to complement one another rather than substitute for one another.

2.5 Propositions

Given the small, exploratory evidence base, we put forward propositions rather than formal hypotheses.



Table A. Research propositions and the evidence used for each

ID	Proposition	Evidence used
P1	The share of approached shoppers who receive an explanation is the main driver of day-level purchase conversion.	Table 1; Fig. 1
P2	Once an explanation has been given, the likelihood that a shopper accepts a trial is stable across products and days.	Table 1
P3	Low-priced SKUs contribute disproportionately to unit volume and high-priced SKUs to sales value, so promotion targets should use both measures.	Table 2; Fig. 2
P4	Merchandising lapses in placement, cleanliness and stock occur together rather than independently.	Table 3
P5	Shopper questions concentrate on a few information barriers that standardised, approved messages can pre-empt.	Table 4

3. Research Design and Method

3.1 Setting and approach

The study follows an embedded single-case logic (Yin, 2018). The case is a modern-trade grocery store, Navjeevan Plus in Jalgaon, Maharashtra, where the first author worked as the manufacturer's brand promoter from 18 May to 17 July 2026. A single case suits an exploratory aim, in which depth of observation and a clear view of the mechanism matter more than statistical generalisation (Eisenhardt, 1989). The method is participant observation. The researcher acted as promoter and recorder at the same time, which gave direct access to shelf-level processes but also brings the risk of observer bias, taken up in Section 7.

3.2 Data and measures

Four structured instruments were kept during the placement. The first was a promotion record noting, for each promotion day, the shoppers approached, explanations given, trials accepted and units sold. The second was a sales ledger for the day with the highest sales, listing units and maximum retail price (MRP) by SKU. The third was a merchandising audit that rated shelf share on a 1–3 scale and recorded three yes/no indicators: eye-level placement, cleanliness and adequate stock. The fourth was a customer query log capturing each shopper's question, the promoter's reply and the result.

Four funnel ratios are used: explanation rate (explanations divided by shoppers approached), trial rate (trials divided by approached), trial-to-explanation ratio (trials divided by explanations) and purchase conversion (units divided by approached). The ledger counts units rather than buyers, so conversion is a units-per-approach figure. It can exceed the proportion of shoppers who bought if some of them took more than one unit, and it is therefore read as sales yield and not as buyer incidence.

3.3 Analysis

The analysis is descriptive. We calculate funnel ratios, the revenue mix and the unit mix, and we check the rank (Spearman) association between day-level ratios. These ρ values are given for orientation only, since five observations do not support any inferential statistic. The query log was coded inductively into themes by the first author, and the themes were checked against the exact wording of the logged queries. No shopper was identified, no personal data were stored, and the store permitted the placement activities.

4. Findings

4.1 The engagement funnel (RQ1)

Over the five promotion days, 500 shoppers were approached. Of these, 325 (65.0%) received an explanation, 206 (41.2%) accepted a trial, and 128 units were sold, equal to 25.6 per 100 approached. A different product was promoted on each day, so differences between days mix product effects with day effects (Table 1).



Table 1. Promotion-day funnel at the study outlet

Date (2026)	Product promoted	Appr.	Expl.	Trials	Units	Expl. rate	Trial ÷ Expl.	Conv.
22 May	Tomato ketchup 1 kg	92	64	40	22	69.6%	62.5%	23.9%
9 Jun	Mango pickle 400 g	110	75	48	31	68.2%	64.0%	28.2%
23 Jun	Green chilli sauce 200 g	75	40	25	14	53.3%	62.5%	18.7%
7 Jul	Instant gulab jamun mix	125	88	55	42	70.4%	62.5%	33.6%
16 Jul	Special chole masala 100 g	98	58	38	19	59.2%	65.5%	19.4%
Pooled		**500**	**325**	**206**	**128**	**65.0%**	**63.4%**	**25.6%**

Source: field promotion record

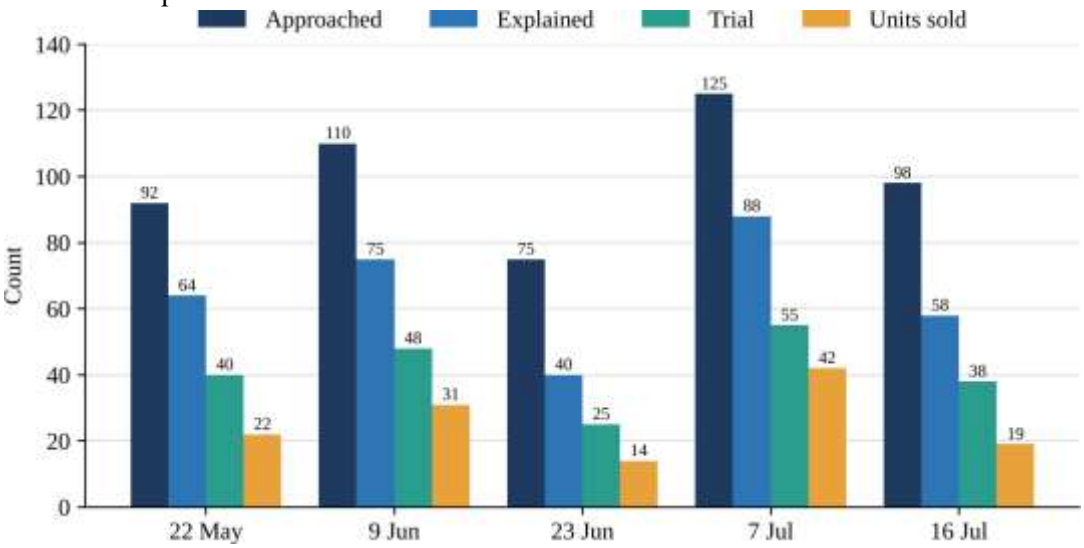


Figure 1. Funnel counts by promotion day.

Two patterns stand out. First, the trial-to-explanation ratio stayed almost constant (62.5–65.5%). Once a shopper had been drawn into conversation, the chance of trial was about the same whatever the product. Second, conversion varied considerably (18.7–33.6%) and moved together with the explanation rate. The two days with the lowest explanation rates (23 June at 53.3% and 16 July at 59.2%) produced the lowest conversion, while the two days with the highest rates (7 July at 70.4% and 22 May at 69.6%) were among the three best. The rank association between explanation rate and conversion was $\rho = 0.90$, and between trial rate and conversion $\rho = 1.00$ ($n = 5$, descriptive only).

The day with the highest conversion featured an instant dessert mix, which is tied to festive occasions, whereas the day with the second-lowest conversion featured a niche masala, so product type may also play a part. These patterns agree with P1 and P2. However, they cannot distinguish an explanation based on promoter capacity (how many shoppers one person can engage) from one based on shopper mix or product.

4.2 Volume–value structure of a peak day (RQ2)

On Sunday 21 June 2026 the outlet sold 134 units across four SKUs, worth ₹11,755 at MRP when the line items are summed (Table 2). The average price per unit was ₹87.7, but the mix was very uneven. The two cheapest SKUs (garam masala at ₹35 and ginger-garlic paste at ₹50) accounted for 60.4% of units yet only 29.2% of value, while the 1 kg ketchup and 1 kg pickle jars accounted for 39.6% of units and 70.8% of value (Figure 2).



Table 2. Peak-day sales (21 June 2026)

SKU (pack)	MRP (₹)	Units	Value (₹)	Unit share	Value share
Tomato ketchup (1 kg pouch)	140	35	4,900	26.1%	41.7%
Mixed vegetable pickle (1 kg jar)	190	18	3,420	13.4%	29.1%
Ginger-garlic paste (200 g pouch)	50	40	2,000	29.9%	17.0%
Shahi garam masala (100 g box)	35	41	1,435	30.6%	12.2%
Total		**134**	**11,755**	**100%**	**100%**

Source: sales ledger. The ledger total is used here; the summary figure of ₹11,772 in the placement report differs by ₹17 and should be reconciled against the source ledger.



Figure 2. Unit share versus value share by SKU on the peak day.

This divergence supports P3. A promoter or store judged only on units would lean towards small, inexpensive packs, whereas one judged on value would prioritise large formats. The peak day fell on a Sunday and was not part of the funnel record, so no conversion rate can be given for it, and weekend footfall may explain part of the volume.

4.3 Merchandising audit (RQ3a)

Table 3. Merchandising audit scores

Date (2026)	Category	Shelf share (1–3)	Eye level	Clean	Stock OK	Lapses
20 May	Pickles	3	Yes	Yes	Yes	0
5 Jun	Ketchup and sauces	2	Yes	Yes	Yes	0
19 Jun	Culinary pastes	3	No	No	No	3
4 Jul	Dessert mixes	2	Yes	Yes	Yes	0
15 Jul	Spices	1	No	No	No	3

Source: audit checklist (yes/no items: Yes = 1, No = 0). Green = compliant; red = lapse.

Three of the five audits were clean on every indicator. The other two (culinary pastes and spices) failed all three yes/no items at the same time, which is consistent with P4. The notes for the paste audit describe the product on a



bottom shelf, visibly dusty, with only four units left, even though its shelf-share score was high. This indicates that the quantity of shelf space can conceal quality problems. It is also notable that ginger-garlic paste sold 40 units two days later on the peak day. That may reflect strong underlying demand, restocking after the audit or the promoter's own effort, and the data cannot show which. It does caution against treating sales alone as proof of good merchandising.

4.4 What shoppers ask (RQ3b)

Table 4. Coded shopper queries

Theme	Illustrative logged query (paraphrased)	Promoter response type	Outcome
Usage clarity	Is the pizza-pasta sauce ready to use, or does it need cooking?	Product specification	1 unit
Price–pack value	Is the 1 kg jar better value than small pouches?	Cost-per-gram comparison	1 unit
Ingredient trust	Does the paste contain artificial preservatives, and will it change the taste of curry?	Quality and taste assurance	2 units
Product form	Is the vermicelli roasted, for quick kheer?	Product specification	1 unit
Sensory expectation	Is the garam masala pungent or aromatic?	Process and aroma explanation	1 unit

Source: customer query log (five logged interactions).

The five queries reduce to four information barriers: how the product is used, whether the pack size offers value, whether the ingredients can be trusted, and what the product will taste like. The promoter could resolve each of them on the spot, and every logged interaction ended in a purchase. The log, however, is purposive and small. Only interactions that the promoter chose to record appear in it, so it overstates success and cannot yield a rejection rate. It therefore supports P5 only as an illustration of coding categories and not as a measure of how often each barrier arises.

5. Discussion

In this setting, the central operational variable appears to be reach into the shopper stream, that is, how many of the shoppers approached can be drawn into a conversation, rather than the quality of persuasion at the margin. Once a conversation began, about two in three shoppers tried the product, and the 206 trials produced 128 units, roughly three units for every five trials. This fits the staged reasoning of AIDA (Belch et al., 2021) and the emphasis of engagement theory on interaction as the generating mechanism (Brodie et al., 2011). It also shows that, where a promoter is involved, engagement is limited by capacity and is therefore a managerial decision and not only a trait of the consumer.

The gap between volume and value adds a measurement point that field targets easily overlook: incentives based on units and incentives based on value pull promoter effort in different directions. The audit failures, which arrived together, suggest a shared cause such as a missed restocking visit or a low-priority shelf bay, not isolated mistakes. Finally, the themes in shopper queries indicate that much of the promoter's work is informational. A standard bank of approved answers would make responses more consistent and reduce dependence on individual memory, in line with sales-training guidance on product knowledge and need identification (Ingram et al., 2020).

6. Implications

Managerial. (1) Monitor the explanation rate, and not only units sold, as a leading indicator of promoter productivity. (2) Set dual targets for units and value, and match promotion schedules to category and pack-size priorities. (3) Pair promoter visits with a brief audit using the four-item checklist, and escalate any outlet that fails two or more items. (4) Prepare a short, category-wise library of approved answers to the four recurring information barriers. (5) Maintain a structured feedback channel from outlet to sales team so that repeated stock-outs and recurring objections reach



decision-makers.

Theoretical. The study turns engagement into an observable funnel at the shelf and indicates that the explanation step, more than the trial step, accounts for most of the day-to-day variation in yield. Models of in-store promotion should therefore include promoter capacity and merchandising quality as explicit moderators. The study also supplies five propositions for confirmatory testing.

7. Limitations and Future Research

The evidence comes from one outlet, one participant-observer and five promotion days. There is no control condition, the product changed from day to day, and the day of the week, footfall, price promotions and competitor activity were not recorded. Observer bias is plausible because the researcher was both promoter and recorder, and the query log is purposive. Sales are valued at MRP and not at realised price, and margin, budget and distributor data were not available. The findings should therefore be read as illustrative.

Future studies should (i) replicate the protocol in several outlets and cities with a pre-registered sampling plan; (ii) use quasi-experimental designs, such as matched promoter and no-promoter days for the same SKU; (iii) capture shopper characteristics and basket data so that buyer-level conversion can be estimated; (iv) test the funnel with multi-level models that separate promoter, product, store and day effects; and (v) compare promoter-led engagement with digital and quick-commerce discovery routes for the same brand.

8. Conclusion

At the last step of the FMCG value chain, sales depend on a sequence that the manufacturer can observe and manage: the product must be visible and in stock, the shopper must be drawn into a conversation, the conversation must answer her particular doubt, and trial must follow. In this single-outlet case, the share of shoppers engaged was the clearest correlate of conversion, price and pack mix set the balance between volume and value, and merchandising failures occurred together. These patterns deserve testing at scale because they point to low-cost managerial levers, namely a promoter checklist, dual targets and a standard answer bank, for brands that compete mainly at the shelf.

Declaration. *The data come from the first author's own placement records. No personal information about shoppers was collected, and no conflict of interest exists beyond the first author's placement with the case organisation.*

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