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INDIA'S
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MAGAZINE
ON MODERN
RETAIL

A Report on Fashion Retail Market of India TRENDS & MARKET DYNAMICS

- C.D.I.T RETAIL: THINKING OUT OF THE BOX
- IMPORTANCE OF DATA MINING IN RETAIL

- KEEPING EMPLOYEE MORALE HIGH DURING FESTIVE SEASON
- AMAZON TO UP-THE-ANTE FOR E-COMMERCE BIZ IN INDIA

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While the Indian market is abuzz with flashy malls and glamorous high-street stores, a closer look will reveal that till date it is quite the fashion retail segment which has set the tone for this growth. Indeed, if modern organised retail has come of age in India, then the biggest contributor to it is this fashion retail segment.

In this issue of IMAGES Retail, Technopak shares an exclusive study on the changing trends and market dynamics that are being witnessed by the fashion retail industry today. In this interesting report Technopak talks about the dynamic Indian retail market. Technopak expects it to demonstrate a promising year-on-year growth of 6 percent to reach USD 865 billion, by 2023, from the current USD 490 billion. And of this, the share of apparel in India's retail market is currently 8 percent, corresponding to a value of USD 40 billion. In addition to the fashion apparel segment, the growing demand for fashion accessories makes the Indian fashion market both interesting and lucrative.

Apart from this report we have our regular columns. In Retail Excellence this time we have covered the premium home interior and solutions retail chain Evok, a brand that was introduced in the year 2008, and which today has 17 Evok stores pan India and is on the cusp of breaking the 100 crore mark. We have also covered the emerging trend of LED lighting which is quite cost efficient for retailers.

The festive season brings perfect opportunity for retailers to gear up and market themselves in the best way possible and in this effort their front end people are the ones that have to extend themselves, so it is imperative for the retailer to keep them happy and motivated. In this issue we have tried to talk to many retailers on the pertinent issue. We have also tried to encapsulate the essence of the festive season.

While this, the December issue is a lovely bouquet of several different topics and issues of utmost importance for a retailer, we would urge you to await our January issue which is a special on the importance of Technology in retail...so stay with us and stay retail updated.



Amitabh Taneja

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Cover picture courtesy: Blocher and Blocher Partners (Mirwald, Michael)_Victorinox Flagship store in Düsseldorf, Germany

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Manas Wadhwa



Varun Khera



Charu Ralli



Sachin Maharia

THE POWER OF FOUR

Four entrepreneurs took the risk of leaving their secure jobs to set up Bean Tree Coffee (BTC). The result is three different concept restaurants – Desi Vibes, Kaffiiaa, and Nysha Bar & Grill. Partners Manas Wadhwa, Varun Khera, Charu Ralli and Sachin Maharia discuss the challenges of running a food service business with Annie Johnny



What was the ideation behind these restaurants?

Wadhwa: There are different reasons for us to have started these restaurants. For example, the idea to start Kaffiiaa came when we experienced good coffee being served alongside terrible sandwiches in a café. We felt that there weren't enough places in Noida where one could enjoy coffee along with good food, and so the idea of starting an Italian café came about. Similarly, we noticed that there was a huge vacuum in the market for an informal place where one could bring their family for casual drinks and good food. So we set up Nysha, where we have a separate section for families.

What infrastructure have you put in place?

Maharia: After setting up the areas for dining, kitchen and storage, implementation of various control methods follows, such as installation of point of sale software for guest billing, customer database, and a cashier cage, which also becomes a centre point for handling phone calls and mail. The kitchen has been sub-divided into four different parts: the receiving dock, storage (dry, fresh, temperature controlled), preparation area, and cooking area. Every area is equipped with gadgets and technology for optimum functioning. For example, there is a biometric access system in the kitchen, and we have an MMS terminal along with the weighing scales in the receiving area. In fact, we are trying to automate our entire supply chain and go completely paperless. All our vendors are online now, but we had to deal with some difficulty initially as some are from the unorganised sector. We held training sessions to make them familiar with the online system. This has helped in controlling inventory, reducing storage levels, eliminating stock-outs, and the time gap between ordering and receiving stock.

What is your staff strength and support?

Khera: Every outlet has one chef to run the kitchen, who is supported by three to four chef de parties (CDPs), who take care of different sections in the kitchen, and are assisted by commis and helpers. All new members undergo a training programme for basic hygiene, safety, customer service, handling complaints, and on understanding the standard recipes. We also have refresher courses to sharpen the team's skills, and periodic workshops in coordination with the best trainers in the industry like chefs from star hotels. Attrition, like any other industry, is a matter of concern, however, by imparting good training, offering competitive salary packages, in-house promotions, and overall skills development, we keep our attrition rate low.

What are your efficiencies in supply and logistics?

Ralli: Delivering a great dining experience at a reasonable price in an ever-changing marketplace is no small billing, especially as big chains prepare against soaring fuel costs, product quality concerns, and nutritional mandates. Moreover, the average consumers are picky about what they like and how they like it. Our restaurants routinely introduce new items on the menu, and work with suppliers and service providers to bring new ingredients. Since the shelf life of most food items is very less, we have to follow a completely

different inventory management strategy, for instance, we have to handle fresh supplies with different handling protocols, like milk has to be stored at 4 degree celsius, and so on.

Please tell us about your kitchen equipment.

Ralli: We run separate kitchens for all the three restaurants, which have been designed and equipped to serve its specific menu. For example, in Kafiiaa, our Italian thin crust pizza is made in high quality deck ovens, and the Indian breads are made in open earthen clay ovens. All equipments and tools are as per FSSAI standards and made of food grade material. To keep our carbon footprint low, we use PNG in our cooking ranges, CFC-free refrigeration, and recycle whatever is possible. Recycling is done both at the kitchen level and also garbage.

Delivering a great dining experience at a reasonable price in an ever-changing marketplace is no small billing, **especially as big chains prepare against soaring fuel costs, product quality concerns, and nutritional mandates**



DESI VIBES

Started: **June 2005**

Cuisine: **North Indian and Mughlai**

Seating: **80 covers**

Target customer: **All age groups**

Rotation: **2 to 3 times a day**

Daily footfalls: **Around 100**

Yearly growth in revenue: **15-20%**

Located in the posh Sector-18 market of Noida, Desi Vibes lures epicureans with mouth-watering food and refreshing beverages. The ambience is rich with plush interiors, mellow lighting and soft music. Its décor brings out the nuances of India's rural culture, with antique chairs made of beaten wood, marbles and pebbles for flooring, a small well in the center of the floor, mini cots, and a carved wooden tree with birds. The walls are layered with real cow dung as is the practice in villages, display ethnic products. Every table has an antique like a 300-year-old lock, ancient bombs used by Indian soldiers during wars, 18th century stamps and coins from the Mughal era, priceless knives and supari cutters. The origins of these products are detailed in the menu card. Terracotta flatware, copper dishes and welcome drinks in kullad and pappad enhance the ethnic flavour. There are around 12 varieties of chutneys and pickles, the hot favourites being brinjal and apple chutney.

AWARDS:

- ▶ Best Indian Restaurant in Noida by Times Research Awards
- ▶ Service Excellence Award 2012, 2013 by Trip Advisor
- ▶ Top 10 Value for Money 2012 and 2013 and Top 10 Family Restaurants (Delhi/NCR) by Zomato
- ▶ Best Butter Chicken Award by Burrp.com
- ▶ Best Indian Restaurant in Noida 2012 by Brands Academy
- ▶ Gourmet Pleasure Restaurant by Citibank
- ▶ Covered by more than 26 channels and travel shows such as NDTV Good Times, Metro Nation.

FASHION RETAIL SCENARIO IN INDIA

TRENDS AND MARKET DYNAMICS

The Indian retail market is expected to demonstrate a promising year-on-year growth of 6 percent to reach USD 865 billion, by 2023, from the current USD 490 billion. The share of apparel in India's retail market is 8 percent, corresponding to a value of USD 40 billion. In addition to fashion apparel, the growing demand for fashion accessories makes the Indian fashion market both interesting and lucrative

A Report by Technopak



The Indian fashion retail market has witnessed several fascinating changes and challenges in recent years, which are indicators of the country's evolving fashion retail market. The challenges associated with these changes need to be addressed in the most efficient and prudent manner in order to harness the concomitant benefits.

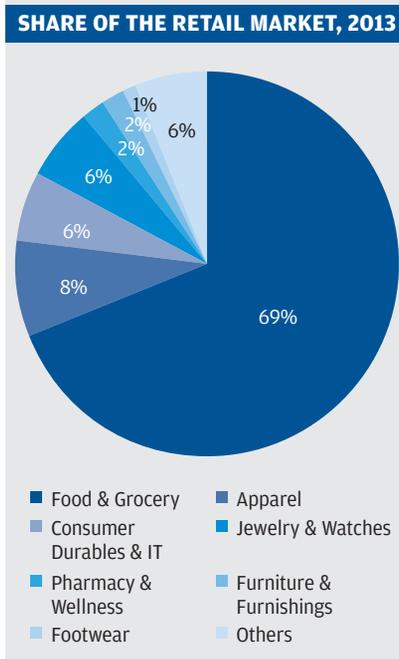
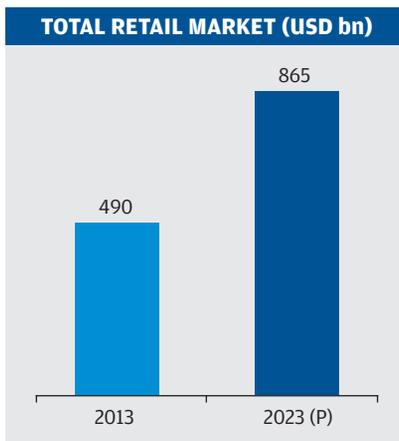
Trends in the Indian Fashion Market

The trends emerging within the Indian fashion market can be broadly classified into four categories, depending on their associations; these are discussed in the following sections.

India's Macroeconomic Scenario

The sound growth of the fashion products market, driven by the 8-to-9 percent GDP growth and positive investment sentiment, looks like a thing of the past. The growth story of one of the largest emerging economies, India, has required severe revision. A growth rate under 5 percent, coupled with double-digit inflation, has dampened consumer demand for fashion items. As a result, the Indian fashion products consumer has become a cautious spender; demanding value for the money spent. In many cases, the Indian middle class has started trading down by shifting to either products available at a lower price-range or to lowering purchase volumes if within the same price range. The recent inflation in food and vegetables' prices has added to the woes of the Indian consumer. Food being an irreplaceable item has eaten into the share of non-food items in recent years.

In addition to the weak economic sentiment, the worsening political environment and an increasing lack of confidence in governments and institutions has negatively impacted the country's overall business competitiveness. As a consequence, the retail market is also hit in terms of business growth.



Source: Technopak Analysis

With no sign of any substantial recovery in the macroeconomic sentiment or any respite from inflation in the near future, the trading down by Indian middle class will continue in the coming months. Non-food items, including fashion, are expected to bear the adverse impact of this trading down.

India's Demographic Dividend

The demographic dividend of India is tilted in favor of the consuming age group. In contrast to the increasingly-aged populations in the West, Japan, and even China, India is expected to become the world's youngest emerging economy by 2020, with around 64 percent of its population in the working age group. This young consuming class has new aspirations and is more open to experimenting with fashion brands and modern designs.

In addition to such a favorable age group, the Indian fashion retail market is expected to deal with a heterogeneous consumer group. The Indian fashion consumer has been traditionally heterogeneous as a result of income disparities, the influence of ethnic clothing, regional preferences, etc. But in recent times, heterogeneity in taste, choice, and preferences has increased substantially even within consumers in the same region and same ethnic group, belonging to the same income level and age range.

LUXURY SOLUTIONS FOR RETAIL WITHOUT THE HASSLE



Why to confine the shoppers to the limitation of just four walls, when sky is the limit. With the new-generation pop-up shops now a brand can display their products at a beachside or amidst a busy road. The big question remains is India ready for pop-up retail culture, lets explore more

By Nilesh Jadhav

While manufactured products are moving towards a more convenient, state-of-the-art look and feel, the retail industry is not far behind. A new concept of the portable luxurious retail outlet, which provides an entire consumer experience, is set to be the next benchmark for the Indian retail industry

With marketing strategies in India also following the trend of the customer being king, it is important to cater to new age consumers who shop with their eyes. The experience of shopping for things, should indeed be as exciting as actually purchasing and owning the product. This is what sets a brand apart from the many competitors flooding the market. It will come as a small surprise then that the vast array of options and possibilities available through high class portable retail kiosks are about to give "going shopping" a whole new meaning.

Indian retail industry has many different types of portable kiosks for your display and merchandising needs. Each store and display option tries to outdo each other in creativity and attractiveness. However there is a set up and dismantling cost and time and gives a look and feel of a temporary structure. Due to wear and tear there is also limited reusability, this means that each kiosk at a different location is a new expense for the brand.

The ones that are reusable or semi permanent such as the roadside food stalls for fast food are often old and dirty and are difficult to maintain. This makes it an unattractive and unhygienic option for the discerning consumer. However with the type of materials available in India today, your kiosk can give you the look and feel of a luxury hotel. This enables the customer to feel at home and have an excellent customer experience. The whole experience of shopping or dining gets elevated from one of merely function to that of indulgence.

Internationally, mobile food vans, garage/garden offices or shops, and branded kiosks in the centre of atrium spaces in large malls are a common sight. Shop in Shop stores are also becoming very popular. The concept is where a brand owner or retailer takes up space in another retailers store and fits it out. This could be in addition to the standalone store he occupies. The benefits include shared costs, shared marketing and demand generation, and speed to market. There are many different and unique ways these stores can be fitted out.

Also at airports, shop in shop type displays make better use of marketable space and gives passengers something to do while they wait to board. Not to mention that in this way brands can reach out to a much larger audience, with travel becoming more and more frequent as a direct effect of globalisation.

Highend display booths for luxury products are now an option in India. For ex; with full glass paneling option, luxury cars, such as Audi or



In the last decade, there has been a sea change in how retailers do business in India. For centuries, retailers worked with a relatively smaller number of consumers who usually went back to the same retailer because of loyalty and lack of options in the market. Retailers, on their part, knew exactly what the consumers wanted. India's traditional retailing industry was highly fragmented, unorganised, unexposed to international standards, and scattered to over hundreds of towns and cities with small and medium entrepreneurs operating in their own territories. Only a few explored the retail platform on a larger scale. But, that is now a thing of the past. Today, a retail revolution is already under way.

By Srikant Sastri

DATA MEETS RETAIL



Modern retail has brought India to sprawling shopping centres, multi-storeyed malls and huge shopping complexes, offering shopping, entertainment and food all under one roof. According to studies, the current Indian retail market is estimated to be worth US\$ 450 billion and one of the top five retail markets in the world by economic value. There is no doubt that the Indian retail scene is booming, but does it mean that the industry is without challenges in relation to strong-growing changes and trends in technology as well as customer demand?

Key challenges faced by retail industry in India today

India is facing some very specific issues when it comes to retail. Let's take a consumer angle first.

First, India is many Indias – it's not homogeneous. We have a geographically dispersed population, and consumer preferences vary by each region, necessitating a need for localisation even within a state. With varied cultures, backgrounds and tastes, it is very difficult to predict and monitor the consumer behaviour.

The expansion of the Internet and 3G in smaller towns has profoundly, and irreversibly, changed the way people shop. Empowered by their access to digital content, consumers are not only shopping online,

but are searching, researching, comparing prizes, and getting advice and reviews from peers on social networks. Online channels and price transparency are driving margins down. Media consumption habits are simultaneously exploding and fragmenting.

As a result, consumers today are spoilt for options. They face what Prof Barry Schwarz of Harvard Business calls 'the Paradox of More'. As the consumers get more choices, they get more confused and get paralysed. As a result of this confusion, they postpone decisions and are less happy. In other words, more is less.

This is compounded with the specifically Indian challenges – traffic, parking, crowds, etc., which often make Indian retail shopping a less than pleasant experience.

From a company perspective, too, retail is challenging. Modern retail requires high capital expenditure, increasing rental and people costs, high investments in training, inventory, etc. It also requires state-of-the-art technology, from ERP, supply chain and POS systems to investments in mobile and online channels.

In a nutshell, it has become very challenging for companies today to reconcile the high costs of modern retail with the increasing complexity of consumer demand and satisfaction.

What does all this mean for a retailer?

First, making stores profitable in India is tough, unless the retailer converts footfalls into sales.

To be able to do so, retailers need to be able to operate like the old-fashioned kirana on the one hand, and like Walmart on the other. They need to be able to create the same personalised appeal that the local kirana merchant would offer us only a few years ago, while doing so in the modern ambience and format.

In other words, they need to make choices simple and personalised.

Sheena Iyengar of Columbia University says that when you offer consumers fewer, more relevant, choices, they are more likely to choose, more confident in their decision and happier with what they choose.

To simplify choice to this level, retailers need to be able to make very sharp personalised offers to consumers to increase sales and reduce costs. Second, there is an urgent need to look across media and increasingly go digital – and mobile – to reach consumers. Third, there is a need for a multi-channel approach, which does not necessarily mean selling online but, instead, ways of using each channel to enhance

A Choice Engine is a tool that analyses and filters enterprise data **with the use of highly evolved and powerful algorithms to make personalised recommendations and predict customer behaviour**

the value of the other. For instance, using a mobile in a store to provide product information and reviews – particularly at a time when churn-in sales associates are making it difficult to provide high-quality information to consumers. Fourth, stores need to be reconfigured to provide better experience and greater discovery and experimentation.

So, how can retailers increase sales in this day of expensive stores and fragmented media? A great start is to use data to drive decisions and simplify the choices for the consumers. And, that is where Big Data analytics steps in.

Retailers have always had a huge amount of information on consumers from internally generated data. The better retailers have used this to some extent to do micro-segmentation, market basket analysis and other similar techniques. They now need to go beyond this and use the massive digital and social footprints we all leave behind more effectively, in conjunction with internal data. Big Data means to manage and beneficially use this tsunami of real time data to drive better decisions, reduce risks, improve sales and profitability, and personalise consumer relationship management. It also helps retailers



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