

Shopping Centre News

JUNE-JULY 2013

DEVELOPING RETAIL IN INDIA

VOL. 6 NO. 4 ₹100



IRF
INDIA RETAIL FORUM 2013

25-26 September 2013
Renaissance Hotel
Mumbai
www.indiaretailforum.in

Shopping Centre News

JUNE-JULY 2013

PAGES: 84

VOL.6 NO.4

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India has witnessed the emergence of some 300 small and big shopping malls with approximately 75 million sq.ft. of retail space – majorly spread across in and around metropolitan cities and some of the emerging markets. Hence, the industry veterans and champions need a common platform to come together and discuss, share, learn and debate about the potential the market offers, challenges the retail real estate sector faces and the common goals that can be achieved.

The time came again when retail real estate industry stakeholders congregated at the India Shopping Centre Forum (ISCF) 2013 held at Mumbai's Renaissance hotel on 8th and 9th of May to address these issues and shape up the industry better. Conferences at the two-day event covered a wide range of topics guaranteed to address the key issues faced by the industry along with a futuristic approach. It also offered time-tested solutions for a wholesome growth of the industry.

ISCF focusses on the retailer-developer partnership to create a strong consumption culture in India. At this time when Indian retail real estate majors are betting big on large spaces and the country's retail industry looks ahead towards the next 100 million sq.ft. of modern shopping environment,

it will be extremely vital to understand the requirements of global retail chains and involve them in planning and designing not only the next 100 malls but also to rework on majority of the existing but "not so well" performing assets.

Shopping centres are a wonderfully profitable business for those who do it right. It is about knowing what the consumers want and this is what retailers and shopping centre management need to collectively do.

There is a concern related to the escalating land cost, rising interest cost, and the general slowdown of the economy coupled with political instability. But if we as an industry work together, things shall become better. In spite of the government not giving retail an industry status, we have yet managed to travel so far. So you can well imagine if the government gives a little wind beneath our wings, we can soar so much more higher.

Another is the need for serious data that is not only reliable but exhaustive as well which can be used by various industry verticals. All of us as investors need more and reliable data points that we can rely on.

The shopping centre industry needs a collaborative approach to succeed and prosper. Would you like to be a part of the game?



Amitabh Taneja

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Aarvee Printers Pvt. Ltd., B-235, Naraina Industrial Area, Phase – 1, New Delhi 110028 and published by S P Taneja from S-21 Okhla Industrial Area Phase – 2, New Delhi. 110020 Editor : Amitabh Taneja

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Shopping Centre News



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ISCF 2013: Shaping up the Indian Retail Real Estate

Packed with unlimited business opportunities, India Shopping Centre Forum is one of the most prestigious forums that connect the shopping centre industry experts, visionaries, and mall developers with retailers. This year the forum was held at the Renaissance Hotel, Mumbai, on 8th and 9th May. Conferences at the event covered a wide range of topics guaranteed to address the key issues faced by the industry along with a futuristic approach. It also offered time-tested solutions for a wholesome growth of the industry

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ISCF 2013: Shaping up the Indian

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India has witnessed some 300 small and big shopping centres emerging with approximately 75 million sq.ft. of retail space – majorly spread across metropolitan cities and some of the emerging markets. Hence, the industry veterans and champions need a common platform to come together and discuss, share, learn and debate about the potential the market



Retail Real Estate

has, challenges the retail real estate sector faces and the common goals that can be achieved. Leading this initiative was the Images Group with the ISCF 2013.

Citing the focus of the two-day symposium, Amitabh Taneja, Chief Convenor, India Shopping Centre Forum, said: "The ISCF 2013 focusses on the retailer-developer partnership to create a strong consumption culture in India. At a time when Indian real estate majors are betting big on large spaces and Indian retail industry looks ahead towards the next 100 million sq.ft. of modern shopping environment, it is extremely vital to understand the

requirements of global retail chains and involve them in planning and designing not only the next 100 malls but also to rework on majority of the existing but 'not so well' performing assets."

HOW TO BECOME A SUCCESSFUL MALL MANAGER

For the last nine years, Ian Watt, Director, Pioneer Property Zone, has been visiting India and since last couple of years, the frequency is almost once a month. His understanding of the Indian market hence remains unmatched, which combines local understanding with international expertise.

Kickstarting the maiden session of ISCF 2013, Watt in his masterclass "The A-Z of Becoming a Successful Mall Manager" began with a fundamental and pivotal question: "Do you know where your mall is going?" "People don't define this well. More often than not, in India, it is like I am going to build the mall and that is the beginning and the end of the story. The problem starts arriving afterwards since there is not much understanding regarding mall management. What we shall discuss is the skills required," said Watt.

He also discussed the situation in the US where in the last two years, there was just one new

shopping centre built and similar situation exists in Europe. But in India things are not that bad. "You need different set of skills required to take care of your malls when you see them failing. This is different from the skill set required to build a new mall. When a mall is being developed, the developer is just interested in his ROI. But unfortunately in India, the ROI is measured on instant cash flow. We should understand that in the shopping centre industry, it is the value that is added as we go forward. So we should keep in mind that value can only be created through keeping track of the success of retailers operating from there and the customers who visit the mall," he suggested.

Watt further added: "When a shopping mall is built, it has a much bigger impact on the community and province in which it is located. So you have to manage not just an isolated building but the entire area. You as a mall developer are actually creating employment, which is resulting in an increase in the disposable income."

Watt asked mall managers a few questions that they often ignore. "Are you managing an asset or are you providing a janitorial service? Running a shopping centre embraces a lot more things. What your investors and retailers at your shopping centre think you do? These questions are imperative as each one has a different perception of your role as the shopping centre manager. Do you have a say in who the tenants are? Do you have a say in any important decisions being undertaken for your property? From my experience, the expectation more often than not, when we talk of mall management, is that you are just expected to provide a caretaker's service. India shall eventually learn its way to progress. In Europe and other developed countries, the manager has a much more interactive role to play than just see through the day-to-day activities of the mall."

According to him, as of now mall owners in India still do not know how to manage a mall. They are just



IMAGES SHOPPING CENTRE AWARDS 2013

Images Shopping Centre Awards 2013, the shopping centre industry's most sought-after awards organised by the Images Group, were concluded by giving away 20 awards in different categories to the country's best retail and shopping centre businesses at a glittering awards night. A celebration of excellence in the shopping centre business, the awards applauded those who managed to pull off their business plans with aplomb.

The awards were announced at the two-day India Shopping Centre Forum 2013 which was held at the Renaissance Hotel, Mumbai. Executives from some of the most reputed brands and shopping centres from across the country graced the occasion with their presence.

Speaking on the occasion, Amitabh Taneja, Chief Convener, India Shopping Centre Forum and Founder Director, Shopping Centre Association of India, said: "We are really happy to present these awards to the shopping malls and personalities who have been continuously bringing value to the industry with

their contribution. I congratulate all of them and hope that this acknowledgement encourages them to continue with their exemplary work."

The awards were a result of 92 nominations in different categories by 54 brands across India out of which a panel of 6 jury members, namely, Sunil Biyani, Director, Future Group; Shailesh Chaturvedi, CEO, Tommy Hilfiger; Joanne d'souza, President, Bennett Property Holdings; Niren Chaudhary, Managing Director, Yum Restaurants International; Yogesh Samat, Managing Director, Foresight Vision Care Company Private Limited; and Amitabh Taneja, Editor-in-Chief, Images Group, selected the top 20 names of businesses and personalities to be awarded with this prestigious yearly award.

Methodology of choosing the right title for the most appropriate personality or brand was something that the jury has done exemplarily at a memorable awards night to honour those who made it big in the shopping centre industry and were able to bring people out of their home to the malls.



Mall Management:

A Rising Phenomenon in the Retail Sector

A well-formulated concept in developed countries such as UK and US, mall management as a practice in India is still in its nascent stage since it has started picking up only over the last decade or so. With the growing organised retail in the country, it has become critical for mall developers to manage their shopping centres more effectively in order to emerge as a winner in the fierce competition

By Anshuman Magazine

Shopping malls have become an essential part in an average Indian's life. This is especially true in case of urban Indians. Nowadays, a weekend is considered complete only if a family has had an outing at a neighbourhood mall. We are already in midst of a retail explosion of a kind with malls and shopping centres mushrooming in large numbers across cities in India.

The mall revolution has not spared the tier II and III cities of the country as well. With the government allowing FDI in multi-brand retail, more and more foreign companies such as Wal-Mart are willing to set up shops in India. Finding that the leading metros are facing severe shortage of land, these shopping paradises are not averse to moving to tier II and III cities of the country. An average Indian now is truly spoilt for choices than ever before!

In matured markets such as

the US and UK, the retail sector has developed into a full-fledged organised industry where over 75 percent of the total trade is done by the organised sector. India's march towards retail as a modern industry started with the opening up of the economy with the adoption of the policy of economic liberalisation in the wake of globalisation during the early 1990s. This paved the way for more active participation of the vibrant private sector in economic activities, including the making of huge capital in retail business.

The congenial environment created by globalisation and economic liberalisation provided a tremendous fillip to trade and commerce and encouraged multinational companies to outsource as well as invest in India. The flow of FDI in India started showing an upward trend and still continues to do so. Big retail chains such as Wal-Mart and McDonald's are now replacing the individual small stores across the country.

Concept of Mall Management

In India, mall management began with management functions of simple facilities, which basically entailed the operation and



maintenance of malls. However, the scope of mall management services has by now been elevated to shopping centre management, which very few companies have upgraded their capabilities to in the current scenario. The expectations of clients are now on complete shopping centre management, which is a drastic shift from the earlier model.

Intense competition and an increasing number of footfalls have compelled mall developers to focus on core competencies and accurately researched offerings to target customers. This is where the concept of "mall management" comes in. At a time, when FDI in

retail could be a possibility, mall management becomes even more imperative.

Availability of variety of services, exposure to brands, promotional offers and discounts under one roof are the factors that attract people to malls. The comfort of shopping in an air-conditioned and feel-good environment as well as access to a variety of food options act as added incentives to patrons.

In a scenario where the numbers of malls are multiplying, mall management has emerged as one of the most differentiating factors. Differentiating themselves from the competition is a sure way of emerging a winner, and this

Malls Educating Children

Stellar Group of Companies, a real estate developer, has launched Stellar Children's Museum, first edu-recreational museum, at the Ambience Mall, Gurgaon. Anjana Menon, Creative Director of the museum, talks about the rationale behind creating children's museum in India and their future plans

By Payal Gulati

Please take us through the journey of Stellar Children's Museum (SCM).

The concept came from having seen children's museum in the US, where we lived. We believe that hands-on learning through unstructured play in areas that are designed for children is highly beneficial for early learners. Since there was no such concept in India – which triggered the seed of SCM – we had to reach out to international experts and came upon Redbox Workshop, a leading design, concept, fabrication and

operational team of experts who specialise in children's museums and have managed projects across interactive and immersive children's environments such as Chicago Children's Museum, Lincoln Park Zoo, Louisville Science Center, and Mid-Michigan Children's Museum.

The designing of the museum for India took over six months as we entered into a concept design phase with Redbox where we provided inputs on what we believed would work best with Indian children and what they were able to suggest from their experience. It took



Anjana Menon, Creative Director, Stellar Children's Museum

another six months to fabricate the various exhibits and get the space at Ambience Mall ready for installation. The museum opened to public on Children's Day (i.e. Nov 14th) last year.

From where did you get inspired to open such unique concept?

The concept came from my own experience during my stay overseas in the US, where most major cities have children's museums. When we relocated back to India four years ago, we found a paucity of recreational facilities for children other than parks and the Zoo, which are weather dependent and provide only restricted hours of access during summer and monsoon, or play areas in shopping malls which typically focus on video games and/or swings and slides and have no educational value.

A few facilities that provide educational entertainment are the National Science Centre, National Rail Museum, and Dolls Museum,

but they lack interactivity. Parents are therefore engaging children at cinemas, food courts, and a few amusement parks which do not have elements of learning or education.

As part of the Stellar Group, which is into real estate development and hospitality, we saw an opportunity in filling this void and have built India's first edu-recreational museum that will provide an innovative learning experience to children.

What kind of learning is being provided here?

At SCM, we engage children and families in exciting experiences that instil an appreciation of our environment, develop fundamental skills, and ignite the thirst for learning. We believe in the intrinsic value of play and provide opportunities for experiential learning and multi-sensory, object-based exploration. Through our educational play-based exhibits



SCM is attracting an average footfalls of about 5,000 per month

Will the Vanishing Third Places Add First-Life to the Shopping Malls?

With the growing mall culture, shopping centres have become an integral part of our routine life. While home and work are the first and second places, respectively, shopping malls have definitely become the third place in our lives. Encouraging such “third places” in our community can really be fruitful for both mall developers and the community as a whole

By Seema Lele

It is true that parks, downtowns, waterfronts, plazas, neighbourhoods, streets, markets, campuses, public buildings or shopping malls all are related to each other. The thread that runs through them is the “community.” All these are derived from the community and they all point to the community itself. A space for the people, of the people and substantially by the people. But where is the space for community to come, enjoy, meet, greet and mingle together. “What suburbia cries for are the means for people to gather easily, inexpensively, regularly, and pleasurably — a ‘place on the corner’, real life alternatives to television, easy escapes from the cabin fever of marriage and family life that do not necessitate getting into an automobile,” (quotes by Ray Oldenburg, who is an urban sociologist from Florida).

And when contextually put together, the most relevant abode

today is the shopping centre, the mall or the entertainment hub. Much similar to what civic centres were to old settings. Every neighbourhood has it, every town boasts of it, and every city takes pride in it. But then too, we all know that few malls are successful and others are hardly any. Time and again, we have only read about articles focussed on increasing retail, additional shop fronts, novel marketing ideas, so on and so forth. But every time a new idea is born only with a perspective of “how to take from the community.” Let’s look from the other end of pincenez - how about giving back to the community?

Shopping centre is largely an American concept. The growth of the shopping centre industry there has been well documented (Maitland B., 1976, Design and Planning of Retail Systems London; and Ghosh and McLafferty, 1987, Location Strategies for Retail and Service Firms). It is thus appropriate to use American studies as a basis for identifying the five stages of shopping centre developments. An Australian firm has presented their

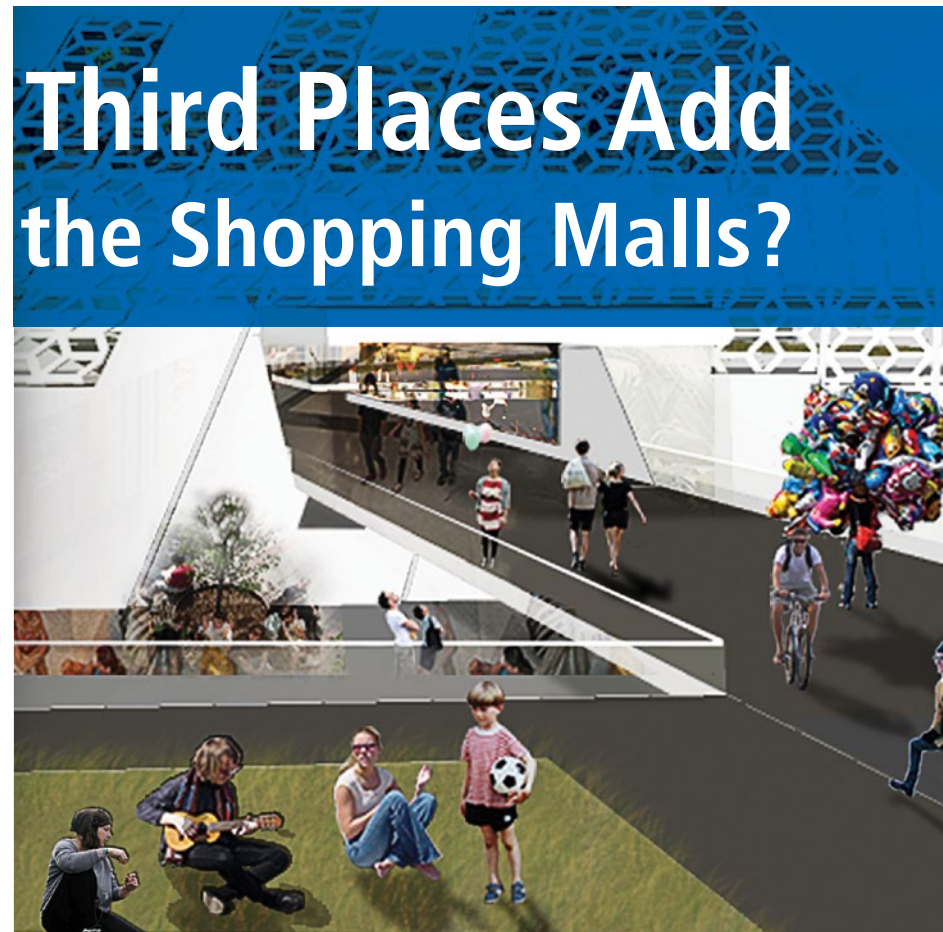
studies in form of a research paper.

The first style of shopping centre, such as Raleigh in America in 1949, while essentially reflecting a traditional retail strip format, was centrally managed with a uniformly themed appearance. Similar to that of our Crawford Market, Fort or APMC market, New Bombay at their onset. While doing so, plain availability of similar nature goods was the sole purpose. It was like a special economic zone (SEZ) in itself, with specific agenda of variety of goods.

In these climate controlled consumer spaces that were a set formula for shopping alone, a further element of leisure and/or entertainment dimension was incorporated. Cinemas, cafes, children’s amusements and the provision of entertainment such as live performances and fashion parades became integral part of added subsumptions in the third stage. With time, improvisations set in. Which was first added as mere inclusion, later on strived for specialisation. Shopping centre managers sought different approaches, such as the themed

restaurants, theme parks, much larger cinema complexes and a greater focus on food (according to a study by Maitland, 1976). Fourth stage is characterised by specialisation with centres focussing on one particular retail area, such as fashion, bulky goods, furniture, home and garden, food or convenience, often in a large-format retail. There is no longer an assumption that centres will provide a one-stop shopping service, but rather they cater for a segmented and highly mobile consumer population. Here is where “retail” became important and omnipresent. Though India is still riding this wave high, rest of the world is grossly ahead with mixed-use developments.

Essentially, work-live-play all together! And currently it has taken the path of mixed-use developments, such as factory outlets, cinema and food, or office, residential and convenience goods. Giant cities in Hongkong, China, Singapore, parts of US and UK have various examples of successful implementation of such composite model. This business, architectural





Prathamesh Patkar @ Arris Architects

or utility model may not be implemented to its true potential in existing dense cities or suburbs of India. But we can certainly think of its application in new mall planning schemes.

The chart below, as a conclusion of charted growth graph of different features along with evolution of shopping centres, shows an interesting observation. It indicates the importance and relevance of the social factor around which the key shopping centre experience revolves. We can see that only at inception stages

of a shopping mall it was low. But ever since, it has always been rising and is currently high! It is also visible that the retail experience is forever high. For obvious known reasons - of generating income for the developer or promoter of mall and equally contributing to the elite mall experience of shopping in style and spirit! The social aspect relates to the idea of being a communal meeting space. It allows for the social dimensions of participating in a community recreational activity, for seeing and being seen, for meeting and passively enjoying the

atmosphere. This experience can be elevated with profusely providing for open spaces, green spaces, water bodies and landscaped areas in-and-around the shopping mall premises. These will not only breathe a new life into the environmental social fabric of the community but also enhance the overall coming-to-the-shopping-mall experience. The dearth of community spaces in overall scheme of things, for existing land use

layouts and even new proposals, makes the mall space an apt contender to provide for in ample proportions.

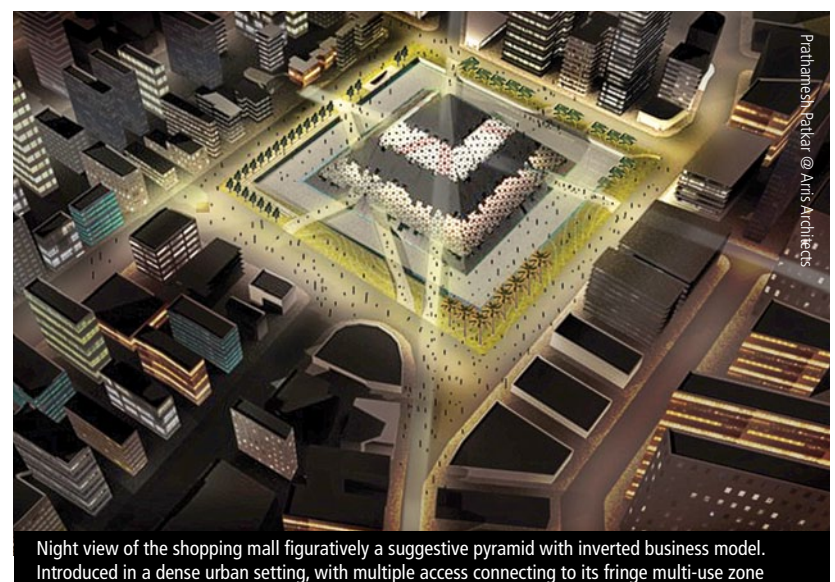
This essentially draws us to the preface of our design solution. The creation of such common, collective spaces hereon referred to as "third places." "Most needed are those 'third places' that lend a public balance to the increased privatisation of home life. Third places are nothing more than informal public gathering places. The phrase 'third places' derives from considering our homes to be the 'first' places in our lives, and our work places the 'second'." Oldenburg in his book *The Great Good Place*, Oldenburg demonstrates why these gathering places are essential to community and public life. He argues that bars, coffee shops, general stores, and other "third places" (in contrast to the first and second places of home and work), are central to local democracy and community vitality.

This brings us to another new concept in mall design "placemaking," which is internationally applied for quality of experience enhancement. "Placemaking" is both an overarching idea and a hands-on tool for improving a neighbourhood, city or region. It has the potential to be one of the most transformative ideas of this century" - Metropolitan Planning Council of Chicago.

It is a multi-faceted approach to planning, design and management

Key stages in Australian shopping centre developments						
	Time period	Key character	Importance of key shopping centre concepts			
			Retail	Entertainment	Social	Services
Stage1	1957	Pedestrian space	High	Low	Low	Low
Stage2	1960's	Enclosed mall	High	High	High	High
Stage3	1996-	Larger, more overt entertainment	High	High	High	High
Stage4	1996-	Specialisation	High	Varies	Mid	Mid
Stage5	2000	Mixed-use convenience	High	Varies	High	Mid

The table above summarises the five stages of developments and highlights the changes in importance of the key shopping centre concepts. While it is clear that retail is of high importance in all stages, the other elements fluctuate according to the style of centre development



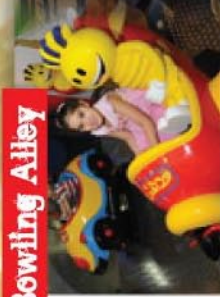
Night view of the shopping mall figuratively a suggestive pyramid with inverted business model. Introduced in a dense urban setting, with multiple access connecting to its fringe multi-use zone

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ORION MALL WINS 'MOST ADMIRABLE SHOPPING CENTRE LAUNCH OF THE YEAR' AWARD.

Orion Mall's well conceived and executed events have time and again been admired and won awards. We have now won one for the launch event – the 'Most Admired Shopping Centre Launch of the Year' award from Images Shopping Centre Awards (ISCA).

Knowing the pulse of its patrons only too well, we hope to bring the best to our clientele and keep the adulation coming.



IMAGES Most Admired Shopping Centre
Launch Of The Year: GLA over 3,00,000 Sq Ft

IMAGES Most Admired Shopping Centre Launch Of The Year
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