

Shopping Centre **News**

AUGUST-SEPTEMBER 2013

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THE LARGEST MALLS OF INDIA

- Understanding Social Media
- Mixed-Use Development
- Vasai-Virar Development: The Way to Go

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We are sure that our readers would be very keen to know which are the biggest malls in India today. In this issue, we are presenting a report on India's largest malls. It is an update of Asipac's 2010 study carried in the June 2010 edition of Shopping Centre News. These rankings are based on their Gross Leasable Area (GLA).

Phoenix Market City, Kurla, Mumbai, has emerged as the largest operational mall as of June 2013, with a GLA of 1,150,000 square feet, followed by the newly opened Lulu Centre at Kochi. Mantri Square at Bangalore, which was the numero uno in 2010, has moved down to the fifth position. Ambience Mall at Gurgaon is the largest mall in North India, while South City Mall at Kolkata is the largest in Eastern India.

Two of the top 15 are in North India, seven in the West, five in the South and only one in the East. Amongst the cities, Mumbai leads with 4 malls, followed by Bangalore with 3 of the Top 15 malls.

It is always very nice to see innovative developments in India being recognised internationally. We congratulate Blocher Blocher India for winning the Iconic Award by the German Design Council for designing an exceptional shopping destination in the city of Ahmedabad--The Mondeal Business and Retail Park. We showcase the elements that went into making this iconic park.

Shopping malls are today using social media and aggressively bombarding their fan base with communications, be it news, promotions, or running on-line contests. Their chat rooms and on-line pages are now abuzz with excited participation. Consider the figures - Select City Walk has 3.25 fans liking it on FB, and InOrbit Malls a whopping 6.7 lac!. More interestingly, the younger malls seem even savvier on

the usage of social media, with the very recently launched Lulu Mall, Kochi already scoring over 1.6 lak likes. We present in this issue a story on the social media marketing endeavours of malls.

As retailers seek quantum growth by expanding into newer emerging markets, we continue our endeavour of featuring emerging retail corridors. The Vasai – Virar region was on the list of 'picnic destinations' for most in Mumbai. With intense congestion in main Mumbai, people started looking at this region for living and began travelling everyday to Mumbai for work and education. Things are changing now. The Vasai – Virar is rapidly developing in all spheres – be it residential, commercial, retail, hospitality, entertainment and amusement. We bring before you a complete analysis of this region and how it could just be an apt location for you to consider for your next retail project.

You will also find our feature on mixed-use development and emerging trends on parking quite insightful.

The forthcoming India Retail Forum on the 25th & 26th of September is just the right platform for shopping centre developers to be with the best minds in retail and it will be our endeavour to help them connecting with the right partners for business growth. Celebrating a decade of recognizing excellence in retail businesses, we at IMAGES are gearing up for the Grand Finale of the 10th anniversary congregation and we hope to see a large number of shopping centre professionals making it to the glittering event to cheer for their best tenants at the coveted "Images Retail Awards."



Amitabh Taneja

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Shopping Centre News

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WORLD

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A look at the newly launched malls in India

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Newly set up stores in malls

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Be it residential, commercial, retail, hospitality, entertainment, the Vasai-Virar belt is emerging as a promising location to be considered for next retail project

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Magneto, Raipur has also introduced retail space called 'Magneto Bellagio' in its existing property to woo the customers

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With the recent relaxation in FDI norms, the issue of not having enough international brands to take up space, will soon be overcome. Indian malls are to all set get bigger.

A report by ASIPAC



Vasai–Virar Development: The Way to Go!

Not too long ago, the Vasai–Virar region was on the list of “picnic destination” for the most in Mumbai. Majority of the inhabitants of this region back then (and still to an extent) belonged to the fishermen tribe. With the influx of population taking a toll on the city of Mumbai, eventually people started looking at this region for stationing themselves and travelling everyday to Mumbai for work and education. Things are changing now. The Vasai–Virar is rapidly developing in all spheres related to real estate – be it residential, commercial, retail, hospitality, entertainment and amusement. We bring before you a complete analysis of this belt and how it could just be an apt location for you to consider for your next retail project!

By Zainab Morbiwala

W

ith a growing population of 1.2 million residents, Vasai–Virar is the fifth largest city in Maharashtra. The population in the region was 1,94,262 during 1971 as per the census. Population growth rate of Vasai–Virar city has always been higher than Greater Mumbai and the MMRDA region. Emerging retail market with four upcoming malls spread over 2 million sq.ft. of retail space. It is 1 of the 10 cities in Maharashtra which are eligible for FDI in multi-brand retail. Presently, there are 2,40,082 residential and 36,277 commercial properties in 4 councils in the Vasai–Virar region.

The incremental demand in this region would substantially increase from the current 2,76,359 units to 4,72,574 in 2021. Since its inception in 2012, the Vasai–Virar Municipal Corporation (VVMC) has been very instrumental in rapid development of the Vasai–Virar city. An annual budget of ₹1,266 crore for the further development of civic infrastructure in the region has been presented in 2012. The Ministry of Urban Development has taken Vasai–Virar under the Urban Infrastructure Development Scheme for satellite town, making it the only city from Maharashtra to be taken under this scheme.

Government has approved second largest SEZ project of more than 3,000 acres of land. MMRDA plans to build a business centre in the lines of BKC on 1,500 acres of land. IT hubs and an exhibition are created on 200 acres of land. The region has strong bus service network of Vasai Municipal Transport (VVMT). Approximately 60 acres of land is allotted to develop a tourist zone which will include a

bird sanctuary and an international amusement park.

With the above setting the context for the potential this region presents, it is obvious that very soon we shall see a boom in the real estate development with retail walking at close lengths to the burgeoning residential development.

WHY CONSIDER THE VASAI-VIRAR BELT?

Viva Group has been at the forefront of real estate development in this region. What gives them an advantage is the thorough background study they have conducted and the close tab that they are keeping on the initiatives being undertaken by the VVMC. Sharing his understanding on the region, Mehul Thakur, Director, Viva Group, says: "With good connectivity, the region now has facilities such as affordable housing, better infrastructure and better governance. The region has lot of infrastructure projects underway and a lot of scope for investors. The region is pollution free and away from the hustle bustle of Mumbai city life. In the present scenario, people want to live in places where they can breathe fresh air and have a sound sleep. Vasai-Virar is one of such regions and therefore a good place for living and leisure. It is one of the places that are close to Mumbai and have good connectivity. People can easily travel to the city by locals which take approximately 90 minutes to reach Churchgate Station (downtown Mumbai) or 30 minutes to reach suburbs of the city." On what makes the region a sure shot success for retail developments, he adds: "The region is closer to trade townships such as Boisor, Palghar, MIDC and Gujarat, which makes it convenient for the retailers to acquire goods and services conveniently."

Shubhranshu Pani, Managing Director, Retail Services – Jones Lang LaSalle India, states: "The population in this belt is certainly ready for retail. Most of the people living there work in Mumbai, with prices for homes of 1,000 sq.ft. ranging from ₹40 to ₹60 lakh. This

makes it a Section A catchment for retail business. The Vasai-Virar belt has now become a municipality, with a population over 15 lakh. It has a well-established residential catchment and the population is growing at a fast pace. In other words, it is definitely a promising retail destination for the future. There are no organised shopping centres in this belt as yet, but the first few are being planned and some are already under construction." According to him,

roadblocks that they would have to overcome, he feels that there would not be any serious challenges in this region's growth as it has sufficient saturation in terms of population and the social infrastructure is good. "There is no retail infrastructure yet, which is precisely what makes it a promising destination for the right kind of retail in the foreseeable future," Pani adds.

Adding a word of advice to his peers, Thakur suggests: "The

RETAIL MIX AS SUGGESTED BY THE RESEARCH UNDERTAKEN (VIVA GROUP & KNIGHT FRANK)

- Entertainment: 7%
 - Lifestyle (Home Improvement): 6%
 - Lifestyle (Clothes/Footwear/Accessories): 23%
 - Lifestyle (Consumer Goods): 37%
 - Hypermarket (Food Store): 26%
- The respondents ranked the hypermarket categories as the most important within the mall



THE REGION IS CLOSER TO TRADE TOWNSHIPS SUCH AS BOISOR, PALGHAR, MIDC AND GUJARAT, WHICH MAKES IT CONVENIENT FOR THE RETAILERS TO ACQUIRE GOODS AND SERVICES CONVENIENTLY.

the catchment holds the highest potential for mid-premium to value retail.

DO'S AND DON'TS

Sharing his views on what the developers need to consider before setting their goals on this region, Pani says: "Mall developers should bear in mind that three malls are already in the planning/construction stage in this belt. Unless they have a great location and sufficient tie-ups with anchors, they would be well-advised not to plan to launch in this belt. There is demand for retailers, so they should launch their retail destination only with the pre-commitment of retailers." Elaborating on the challenges that the retailers could face and

primary reason for which people are migrating to this region is affordability and value offering in terms of real estate and the project amenities. We should keep residential prices in control and give momentum to the current growth. Vasai-Virar has bigger landmass compared to Mumbai, and this region has the potential to be developed into a metropolis in the coming years. There are plans to construct one of the biggest hospitals in Maharashtra, biggest educational campus in India on a 250 acre layout with infrastructure to train and educate students in the major sports which are played in Olympics, to give a boost to the tourist. To give you the potential that this region

offers, we are also planning a theme and entertainment park on a 200 acre layout."

INSIGHTS INTO RETAIL DESTINATION FROM VIVA GROUP

According to Thakur: "Our group wants to provide the residents of the region with all the amenities as per their necessities. We plan to bring brands closer to their homes and give them a good shopping experience. One more reason is that Vasai-Virar belt has become a trading hub for micro markets such as Palghar, Boisor and Dahanu, which connects the travellers to the region so they can enjoy leisure and shopping requirements in the malls." Elaborating on to the retail projects undertaken by the group, he adds: "Currently we are working on two major mall projects namely VIVA Swastik and VIVA Integra, located in Vasai East and Nalasopara West, respectively. VIVA Swastik will spread over 5 lakh sq.ft.



Understanding Social Media: Much More Than Just 'Likes' and 'Tweets'

Gone are the days when just having a page on Facebook or Twitter was considered enough in order to communicate with the customers. An efficient social media strategy is much more than that. Let's have a look at how shopping centres can make best use of social media to stay relevant in the changing times

By Zainab Morbiwala

With malls and shopping centres taking the onus of being public spaces, it is but natural for them to work in sync with their tenants to provide a holistic experience and opportunity to the people who walk in to spend

some quality and eventful time. But putting this agenda into action isn't as easy as it sounds; then it isn't that daunting either, considering at rescue there are enough options to keep all the tenants together and work in tandem with them to achieve common goals related to better revenue generation and of course keeping the customers happy and content for repeat footfalls. Social media has changed the game of "keeping in touch" - be it in our personal lives or professional.

Being tagged belonging to be an inhabitant of the primitive world shouldn't take you by surprise if you do not have a page on Facebook and if you don't care to keep in touch with your customers via Twitter. How "socially active" you are as a shopping centre isn't just defined by the events and activities you decide to conduct, but your claim shall be null and void if you choose to be away from the online social platforms. Earlier it would just be "okay" to have an advertising

and a PR agency in place but today a specialist in the social media space has become a "must have." And if you think, the role and responsibility of the "specialist" rests only with managing your Facebook page and having live interaction on Twitter and pinning on Pinterest, you are all set to fail the exam. Having an efficient social media strategy is much more than that.

Sharing a shopping centre's perspective on the relevance of social media and the kind of

Planning for a Mixed-Use Development of Land

It remains no secret that the retail industry in India is overoptimistic of scaling unprecedented heights and that shopping centres would be the second home to people! Malls after malls and shopping centres after shopping centres are being planned and some are on their way to being developed too only to be called off post the 2008 debacle. Perhaps the 2008 episode led to the much needed correction and since then it has been a journey where players in the industry are on their way to figure out a foolproof plan for retail

In retail, the value and importance of real estate remain indispensable and undisputable. But how much of land needs to be dedicated for retail is something that players in the genre of retail real estate seem to be unsure of. The trend off late is that of mixed-use development where retail is either a byproduct of the other options such as residential, commercial and hospitality or vice versa. Let's decipher the concept further.

By Zainab Morbiwala

and real estate in the country. The concept of mixed-use development is being adopted to do away with the risk of any future failure or uncertainty that could cloud the success of the retail venture.

Commenting on an ongoing project by the Rahejas which has a mix of retail and residential, Kishore Bhatija of Inorbit Malls, at the recently held ISCF 2013, confesses:

“The decision to have retail and residential wasn't pre-planned. We realised it over time that we cannot have too many retailers. That is when people decided to recast wherever there was an opportunity and get into mixed-use wherever possible.” Nikhil Chaturvedi, Managing Director, Prozone, shares that his company is concentrating more on the concept of mixed-

use development rather than just having stand-alone malls.

To get the concept of mixed-use development right, according to Stephen J Ferrandi, Principal Director of Residential Land Brokerage KLN Commercial Real Estate, a minimum of three revenue producing entities are needed, which are residential, manufacturing, entertainment,



Largest Malls



of India

A report by ASIPAC

With the recent relaxation in FDI norms, the issue of not having enough international brands to take up space, will soon be overcome. Indian malls are all set get bigger.

And. Why not? The word "Mall" does indeed inspire a picture of something BIG.

It is perhaps similar to the way we think the word "big" whenever we think of an elephant.

And it would definitely be interesting to know, that of all the big and bigger elephants in the world, which was the biggest ?

We are sure that our readers would also be very keen to know which the biggest malls in India are today. In the following pages, we are presenting a report on India's largest malls - an update of Asipac's 2010 study carried in the June 2010 edition of Shopping Centre News. These rankings of the largest malls in India are based on their Gross Leasable Area (GLA).

In the past three years the Indian retail space has witnessed a sea change. Phoenix Market City, Kurla, Mumbai, which opened in 2011, is the largest operational mall in the country now with a GLA of 1,150,000 square feet, followed by the newly opened Lulu Centre at Kochi with a GLA of 1,045,000 square feet. Mantri Square at Bangalore, which was the numero uno in 2010, has moved down to the fifth position. Ambience Mall at Gurgaon is the largest mall in North India, while South City Mall at Kolkata is the largest in Eastern India. Two of the top 15 given in the study are in North India, 7 in the West, 5 in the South and only one in the East. Amongst the cities, Mumbai leads with 4 malls, followed by Bangalore with 3. The surprise inclusion on the list is the beautiful city Kochi. Even Pune is a new entrant this year.

Sadly, the largest Indian mall is less than a fourth of its compatriot on the world scale (the 4.38 million square feet SM Mall of Asia in Manila, Philippines), and does not count even amongst the top 30 in the world.

India's 15 largest malls have an average GLA of 866,133 square feet, 228 retail units and 2558 parking spots. Phoenix Market City Mumbai has 360 units while Brigade Orion at Bangalore has only 140. The average unit size is 3958 square feet. The average number of parking spots per 1000 square feet of GLA is 3.03. The parking ratio in India is quite low, compared to global standards of 6 to 8 parking spots per 1000 square feet. The survey shows that 14 of the malls, which have been operational for at least one year, have average daily footfalls of 49,351 people. GIP Mall in Noida claims to lead with about 90,803 average daily visitors.

By the way it is said that the largest elephant in India was *Raja Gaj* (spotted for the first time in Bardia National Park in 1985). He stood an impressive 11.3 feet tall at the shoulder. And the largest fellow on the world stage was an 11000-kg, 13-foot (at shoulder) male who was shot in Angola in 1956.





Consumer shopping habits have evolved over time. In a bid to influence these changing habits, it is essential to understand the customers better. Let's explore how to categorise them based on their income and buying behaviour and develop strategies to win their confidence

By Adrian Terron

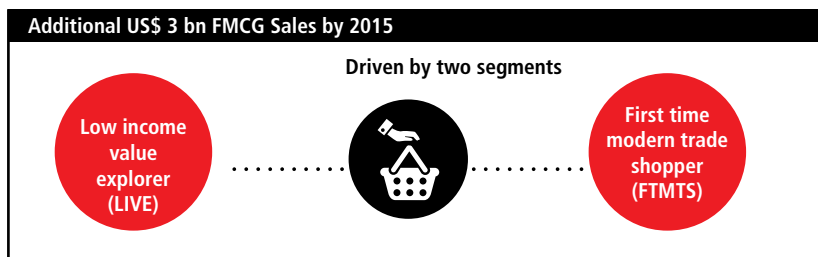
The Next Billion-Dollar Shoppertunity

Consumer research is an investment aimed at understanding consumers better, whereas shopper research is a form of payback from the shoppers, whose needs have been understood and responded to. The payback is in the form of the shopper choosing a particular brand over another at the point of sale. An insight, however, is incomplete until the commercial opportunity behind it is identified.

To understand consumers better, it is essential to categorise them into segments in order to identify the opportunities and develop strategies more effectively. Segmenting based on income and shopping habits, we identify the first segment as the "low income value explorers." This segment is typically constrained for resources and seeks to maximise value in every purchase across categories. The second consists of the population that is slightly higher up on the affluence curve. We are calling them the "first-time modern trade shoppers" - those who for the first time are exposed to the reality of organised retail, to the deluge of brands, to the proliferation of choice and to the profusion of categories that they have never had before. Nielsen's research suggests that these two categories together are worth USD 3 bn.

urban households, every sixth urban household falls into this category. Estimates show that the segment spends USD 2.4 bn on branded FMCG alone and the figure is expected to increase to USD 3.5 bn in three years. Consumption in this segment is driven by a sense of optimism and confidence. One in two has experienced an increase in income in 2012 and one in four expects his income to continue rising in 2013. This increase in income is also converting into conspicuous consumption with half of them having switched from unbranded to branded products.

LIVE: Low Income Value Explorer	
Annual income of up to ₹72,000 per year	Every sixth Urban HH
SEC E	\$2.4 bn on FMCG spends
10 million+ urban HHs	To hit \$3.5 bn by 2015



LIVE: LOW-INCOME VALUE EXPLORERS

The low-income value explorer or LIVE is typically a household with an annual income of ₹72,000. They correspond to the socio-economic classification "E" or the bottom quintile. With a base of 10 million

IMPORTANT INDICATORS

With growing confidence, the LIVE segment is witnessing a change in behaviour and lifestyle. Two-thirds own a mobile phone, a fourth insist on sending their children to English medium schools and a fifth aspire to have home cooling equipment, in addition to refrigerators, in their homes. Their exposure to media via mobile devices, preparation for more lucrative careers and intent to transform their lifestyles are indicators of the tremendous opportunity for brands.

In spite of the optimism, this segment faces several issues. Half of them are anxious about how unpredictable ailments and health issues may derail their plans and pull the magic carpet of aspiration from underneath them. This is an important characteristic of the segment and works well for

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Launch Of The Year: GLA over 3,00,000 Sq Ft

IMAGES Most Admired Shopping Centre Launch Of The Year
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