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HOW CONSUMERS SHOP TODAY

Changing trends in grocery shopping

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Indian food retail is now moving to a more mature phase in its evolutionary cycle, both in terms of growth and footprint. Though there are many catalysts for this welcome development, there remains still a largely untapped area of activity, which if unlocked, can act as a steroid to inject both growth and stability to the sector over the next few years.

I am referring to the vast possibilities for co-operation and partnership that exists between manufacturers and retailers. At a time when all businesses are trying to make themselves more relevant to their customers in a bid to grow and stay profitable, the food retail industry can put this learning into practice by closer engagement between brand and retailers. That will help the two parties to evolve a mutually beneficial understanding and forge a consensus on delivering the best to customers.

With the contribution of MT to overall trade showing positive trends, a joint collaborative effort between retailers and brands can sustain the momentum further. The opening shot on this collaborative march should be fired with brands/FMCGs generally agreeing to the retailers' perspective on the need for extending better margins, product liquidation (unsold/ expired), regular servicing and replenishments by the sales staff, timely delivery of the orders and a well defined credit period policy. Retailers, on the other hand, need to reciprocate by being loyal to the brand, acting as true partners, offering ample shelf space to products and taking the brand message to end consumers.

The road to collaboration and partnership is a long one but an earnest beginning can be made by taking the first few sure-footed steps along that path.



Amitabh Taneja
 Editor-in-Chief

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Taking Omni- channel retail to Phase 2.0

Be it customer experience or linking the physical store to digital, retail is reaching out to a phygital solution, merging the two worlds seamlessly.

By Sunil Bajaj

Retail is growing, growing out of brick and mortar and spreading on the internet and on the cloud. But has it outgrown brick and mortar? Nope. It certainly doesn't look like a possibility in the near future. Then how can we define the evolution of retail? By phygital. Retail has spread its omni-channel wings and conquered the digital world. That has enabled greater reach, seamlessness and advancement. Omni-channel retail, though advanced in reach and consistent in nature, has its own difficulties.

Omni-channel challenges and opportunities

Enhanced in-store experience: Brick and mortar has not lost its relevance in today's digital market. It has become rather important to make the physical stores as smart as the digital ones. Retailers require providing their customers accustomed to hassle-free shopping, similar experiences in-store. This includes line busting methods, knowing customer profiles, targeted offers and reward points.

Bridging online and offline: Customers add products to their online carts and walk into the physical store expecting to check out the products before buying them. If he/she doesn't find it on shelf it confuses them. When a retailer's online and offline stocks don't match, it increases chances of abandonment. If your online and in-store journeys are independent it would require integration for a seamless customer journey.

Linking digital and in-store: Your customer gets a text saying that he is getting a one day offer of 50% off on formals. He happily walks into the store, picks out a few products and proceeds to pay. At the counter he is given a bill without any discount. He shows the text to redeem his offer, but the store associate says that he can only avail it online as there is no personalized privilege offers given in your stores. Firstly, this was not mentioned in the text. Secondly, there can't be such different policies for your online and offline business. You are one retailer, your return policy, offers, payment options (cash,



card, online transfer) and customer service need to be seamless across channels. Lack of connection between your operations threatens the customers' trust in your services.

Right incentives: To connect the dots of the physical and digital retail planning, providing incentives for store managers and associates for encouraging customers to bring business on online and mobile channels is important. Make your stores facilitate phygital by incorporating digital with every purchase. Your store managers could tell the customers to check out the online store so that they can just order from there and pick up from store.

Misunderstood metrics: This happens both ways, from the customer and with the retailer. While the retailer needs to measure retention, acquisition, footfall and market basket analytics as their primary KPIs, customers need to focus on the efforts they are putting in their journey, provide feedback on things they like and dislike about the journey. Mostly retailers end up focusing on targeted marketing and customers on exclusive offers. So when customers

face difficulty with customer care or the retailer has trouble understanding why the customer left, there remains a huge gap of misunderstood metrics.

Technology opportunities for solving omni-channel

Smart devices: Smart phones are ruling the market and your customers are sure to rely on them a lot. Whether you have an online store or a mobile app, you need to be smart and technology friendly. Equip your stores with mPOS, tabs and such handheld devices to match up to the smart technology expectations of your customers. Blend physical with digital seamlessly using solutions such as PRIOS, which connects you to your customers' online shopping profile, enables them to find the right product shelves in your store by connecting their lists to smart shelves, allows store associates to know customer preferences better and also enables customers to pay with whichever method they like.

Master IoT: To master IoT is to master phygital. Connected things and augmented reality is the present and near future of retail. Retailers like UK-based Topshop are already using AR as a trial room for their customers. Japanese makeup multinational Shiseido is using AR mirrors for customers to try on make up before purchasing. The easiest and fastest way to connect reality with digital is virtual reality and connected devices. With indoor location monitors and digital signage boards, it's simple to locate your customers and provide them personalized offers in real time.

Apply big data: With the number of channels growing, data flow is seeing an unprecedented surge. To find business insights from that accumulated data and to apply them to find business solutions, you need big data analytics. Big data will reveal secrets about whom to target, when to target and with what to target in today's customer focused market.

Solving omni-channel challenges with phygital retail

Merging physical with digital or making the business phygital is referred to as 'Omni-channel 2.0'. It is seen as the future of retail, seamlessly integrating physical and digital retail, and further enhancing customer experience by several notches. Phygital retail, using the technological advancements mentioned above, will help omni-channel be seamless by closing the gaps between customers and operations. Here are a few important phygital solutions for retailers that will help them attain omni-channel excellence.

To connect the dots of the physical and digital retail planning, providing incentives for store managers and associates for encouraging customers to bring business on online and mobile channels is important.

Grocery's Big Break

Breakfast foods and beverages appeal beyond the morning daypart.

By Lynn Petrak



Day after day, sunrise follows sunset. The earth revolves. Time clicks on. Certain patterns, of course, are set. But people's eating habits, from sunrise to sunset and back again, are shifting and usurping previous expectations and behaviors.

For one thing, people aren't as defined by the clock as they used to be. That's evident in all-day menus (hello, QSRs), a spate of new cross-daypart products and the decline of some morning meal staples. Product lines are expanding as the lines between dayparts blur.

"The need for greater convenience, changing social mores and an increasingly mobile workforce are changing the definition of breakfast," declares Joice Pranata, research associate at Boston-based Lux Research, which released a report on breakfast cereals earlier this year.

Amanda Topper, food and drink analyst at Chicago-based Mintel, agrees. "Because consumers are blurring snacktime and mealtime, they desire foods that are portable, nutritious and simple to prepare or eat," she says. "Some consumers are eating breakfast foods as a snack, while others eat a snack instead of a meal for breakfast. This has influenced categories, especially cereal, to cater to these behaviors."

Beyond changing definitions, there's sometimes a complete absence of the morning meal. Last year's breakfast consumer trend report from Chicago-based market research firm Technomic found that although two-thirds of people believe it's not good to skip breakfast, only 26 percent actually eat it every day.

Research from the firm Instantly (acquired by Survey Sampling International (SSI), of Shelton, Conn., earlier this year) reveals that more than half of consumers aren't eating breakfast consistently and 12 percent "rarely" eat it. In both the Technomic and

Instantly/SSI research, consumers' most common reason for skipping breakfast or eating it less consistently was lack of time.

"In the U.S., with longer workdays that break out of the nine-to-five model, timing and convenience have become a deciding factor in what many Americans eat in the morning," remarks Andy Jolls, chief marketing officer at SSI.

That said, there are ways to entice customers with breakfast options that meet their busy lifestyles. "If companies can provide breakfast in a format that accommodates busy schedules while appealing to taste and nutrition, they could see significant incremental growth," observes Jolls.

Proving that point is research from Schaumburg, Ill.-based Nielsen. Earlier this year, in its report "Tops of 2015: U.S. Grocery," the market research company reported a 40.5 percent increase in sales of shelf-stable convenient breakfast, making it a top-growing category.

Winners and Losers

Data on sales and consumption of breakfast foods and, for that matter, foods commonly consumed at breakfast, seem to reflect categories at different stages of growth, opportunity and challenge.

In the cereal category, despite some bright spots and new product innovations from major and niche brands, overall sales are declining. According to Lux Research, sales of ready-to-eat breakfast cereals started to erode about a decade ago, and the market has continuously slumped since 2011. Moreover, Lux notes that lower sales seem to reflect a longer-term downward trend rather than a fad, with half of consumers age 2 to 11 shifting away from traditional breakfast cereals.

The future of cereal may rest in addressing the need for on-the-go eating, says Mintel's Topper:

"Cereal has become more portable in single-serve cups and pouches that can be eaten with or without milk."

Another category that has had a certain ebb and flow based on consumer demands and perceptions is on the upswing right now. Per capita egg consumption is pegged at 263.6 for 2016, compared with 252.9 in 2015, according to figures cited by the American Egg Board, in Park Ridge, Ill. Current per capita consumption is the highest it's been in the past 18 years.

Convenient frozen breakfast foods are a hot spot in the overall frozen food category. Chicago-based research firm IRI reports that sales of frozen breakfast food topped \$3 billion from February 2015 to February 2016, a 2.2 percent sales increase from the previous year. Within frozen breakfast foods, frozen breakfast entrées were up 5.63 percent and frozen handheld breakfasts rose 3.11 percent.

Also underscoring the role of convenience is the increase in other handheld foods for on-the-go breakfast consumption. The number of households using cereal bars jumped by 50 percent in the past decade or so, while more than 80 percent of households consume granola bars, according to a report from Rockville, Md.-based Packaged Facts.

Sales of other foods popular at, or linked to, breakfast are also indicative of the current consumer mindset. According to IRI, in the overall yogurt category, sales reached \$7.6 billion in the past year, a 3 percent jump; refrigerated bacon sales topped more than \$4.2 billion for the year ending May 15, down 3.5 percent; and refrigerated sausage/ham sales reached more than \$1.68 billion, down 3.11 percent.



The future of cereal may rest in addressing the need for on-the-go eating.

All Day Long

Consumers' extended appetite for breakfast items presents grocerant, merchandising opportunities.

When fast-food behemoth McDonald's began offering all-day breakfast in 2015, the ensuing bump in sales caused a buzz across both the foodservice and retail channels, indicating similar opportunities for grocery store foodservice as well as for home consumption.

After moving to all-day breakfast last fall, Oak Brook, Ill.-based McDonald's reported that fourth-quarter revenues and earnings exceeded forecasts and that same-store sales in the United States climbed 4.7 percent. CEO Steve Easterbrook

attributed the sales jump to consumer interest in breakfast menu items across the daypart.

Other quick-service restaurants are expanding their breakfast menus as well. White Castle recently launched a 24-hour breakfast program, while Taco Bell unveiled a new \$1 breakfast menu in March. Burger King introduced an Egg-Normous breakfast burrito in May, and Arby's is currently testing brisket



Food retail, with added flavour

Indians love food and want to interact with it. But, when they walk through the supermarket door, do customers face an adventurous food encounter or just bland merchandise shelf navigation? Can retailers and retail support technologies help convert this journey to an exciting, sensory experience?

By Nupur Chakraborty



Today's shoppers are seeking experiences and relationships when they shop and look for an outing, and they want the experience to be consistent across all touchpoints. Who the consumer is, in addition to how, where, and even why they shop, is changing rapidly and forever. 'Humanising' supermarkets and restaurants requires retailers to leverage store design, engagement and technology around experience and culinary inspiration.

Progressive Grocer India capitalised on insights from some leading food and retail support businesses at a 60-minute focused Roundtable discussion.

Retailers worldwide are rethinking overall user experience and more interactive store experiences. As more and more consumers gravitate towards online commerce, physical retailers are progressively imbibing a 360-degree approach that blends personalisation with convenience.

According to analysts, the shift to all things fresh and less processed is being driven by the approach that the quality of consumption has a direct impact on the overall life quality. Shoppers typically want direction, guidance and inspiration. They are motivated to improve lifestyle quality – their bodies, relationships, work and home life.

Can food retailers therefore, deliver micro-localisation of merchandise mix and menus to build custom-tailored experiences, especially for millennials, asked Bhavesh Pitroda, COO, IMAGES Group and moderator of The CXO Roundtable at India Food Forum 2017 on 'The Art and Science of Millennial Shopping'.

Participating speakers included Sukanto Aich, Senior Director, Philips Lighting; Unnat Varma, MD, Pizza Hut (India Subcontinent), Yum! Restaurants; Kirit Maganlal, founder & CEO, The Magsons Group; Madhumita Mohanty, Head Merchandising,

Roundtable Partner

PHILIPS



For millennials, experiences form the bulwark of their social status. The more share-able content that brands can present to them, higher the brand's relevance in their lives.

— Unnat Varma
MD, Pizza Hut (India Subcontinent), Yum! Restaurants

Health & Glow; Vishal Shah, Head - Projects (Real Estate), Tata Starbucks; Henrik Österström, Country Food Head, IKEA India and Shyam Iyengar, Head - Supply Chain Management, Patanjali.

Humanising technology

“Customers are clearly looking at unique experiences and products that suit their sensibilities and environments,” Madhumita Mohanty noted, opening the discussion. “When it comes to food, this is especially evident. Customers today want to replicate global foods on their dinner tables.”

According to Mohanty, customers are increasingly expecting retailers to become more ‘intimate’, via the deployment of technologies such as geo-mapping services to recommend products and services based on past purchase histories.

“There was a time when food was fuel. Now, it is about experiences,” Unnat Varma added. “For millennials, because of technology, the moment there is an experience, it is worth sharing. Experiences form the bulwark of their social status. Therefore, the more share-able content that brands can present to them, the better it gets for the brand's relevance in their lives.”

“In food, what matters now is how it is being packaged and presented. If it is worth capturing and sharing, it improves the user's social currency in his or her network,” he asserted.

“Second, brands and retailers need to deeply understand whatever is happening in consumers' lives. They need to read the triggers, the aspirations and moments-of-truth, and use those insights to design truly ‘connected’ products and marketing campaigns,” Varma added.

Speaking for Tata Starbucks, Shah disclosed that while the graduation to extensive online communication in work-in-progress at the chain's Indian operations, the foodservice giant is in

advanced stages of rolling out an app to connect more closely with customers.

For new brands, how does technology help in transitioning from customer acquisition mode to customer retention mode?

Referring to the Patanjali – arguably India's fastest growing FMCG brand – experience thus far, Iyengar said: “In the west, the customer world is a DIY model. Not so in India. In the Indian context, I believe that technology is always an enabler, not an end in itself. For a brand or retailer, the last mile – which is always a human interface – determines how an acquisition is converted to a loyal customer.”

“If you want to deliver extraordinary experiences, in India, technology has to work with the human component,” he added.

Against the grain

Sounding a contrarian note to modern retailers' rising pre-occupation with the need for technological deployments to connect with consumers, Kirit Maganlal pointed out that customer experiences in small cities and regional markets are driven by entirely different considerations from those in large metros.

“Most retailers point out to how connected today's consumers are, and how everybody wants transactions and customer-engagement online-enabled. In places like Goa, it is quite the reverse! Customers in regional markets typically prefer the real-life touch and feel experience,” he said.

Emphasising this perspective, Maganlal explained that Magsons' 6,000 sq.ft store in Caculo Mall, Panjim generates as much sales revenue as one of the 12-store chain's initial 1,000 sq.ft outlets. “The former is a more ‘commercial’ store, where customers are known by their loyalty card numbers; at the latter, customers are referred to by their names. But the sales numbers are practically identical!” he stated.

A ‘Brilliant’ Strategy

Germany-based retail and wholesale giant METRO AG's retail format Real needed to make its supermarkets bright and inviting for customers, while containing costs. Real stores vary from 5,000 - 15,000 square metres of floor space. In addition to a large selection of fresh foods, the stores carry a wide range of non-food products, including electronics, household articles and textiles. Could supermarket lighting add some luminescence to the fruit and vegetable areas and florist counters?

Philips, which was asked to improve the lighting for the fruit and vegetable department and the adjacent florist counter, suggested using the Philips LED Recipe Luminaire spotlight, with the LED Rose as a light source.

The solution

- To convince the management, a test set-up with LED Rose was installed above the fruit and vegetable section of the Real store in Essen, Germany.
- The effect of the pink light immediately met with great enthusiasm. The colours of the apples, sweet peppers and other fresh fruit and vegetables came to the fore and they looked exceptionally fresh and appetising.
- The positives of the test set-up resulted in the installation of the LED Rose in the fruit, vegetable and flower sections of 57 other Real supermarkets with preparations well underway for the next 70 stores.



Benefits

In addition to attractive lighting of the products, the LED Rose has had a very positive effect on maintenance costs. Thanks to the long life-span of the LED module of 50,000 burning hours, these light sources only need to be replaced every 10 years, even though the store is open six days a week.

CASE STUDY 1

How Patanjali created its way to customers' hearts and profits with Future Retail

The brand's success offers a perfect case study that underscores the importance of collaboration between brands and retailers for the realisation of business objectives and increased revenues.

By Premjit Mohapatra



Patanjali, the fastest growing FMCG, has registered a phenomenal rise over the last few years. The brand has set a benchmark for the other players in the field to emulate. Today, Patanjali is a household name and its astounding growth rates are a subject of many a case study. From a fringe player a few years ago, it is today one of the main players in the Indian FMCG sector riding on the wave of its successful partnership with Future Retail.

Background

“In October 2015, we decided to enter into a partnership with Patanjali. It was the coming together of two home-grown companies with a long-term vision in mind. A vision to win the hearts of our consumers as the partnership progressed,” says Rajiv Sharma, Business Chief – Staples, Future Retail.

“Often the talk in boardroom conversation is about how to win the customer share of wallet or customer share of recall. But we were focussed on winning hearts,” says Shyam Iyengar, Head - Supply Chain Management, Patanjali. Elaborating on the soaring popularity of its products and the meteoric growth of Patanjali, he added, “When we started, Patanjali was restricted to the Hindi heartland, but today we have covered the vast expanse of India and have a pan-India presence. Murraba, hitherto unknown to the people south of Vindhyas, is available in Thrissur. A guy from the north today can avail of a Murraba in the south while aloe vera is giving tough competition to alcohol in Goa. Andhra Pradesh and Telangana, where the staple is rice, people are buying Patanjali atta. We have a natural and herbal product available everywhere for the itinerant Indian.”

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