

RIMAGES

Retail

TM

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THE SHAPE OF
THINGS TO COME!



- ➔ BUDGET 2014 AND ITS IMPACT ON THE INDIAN RETAIL SECTOR
- ➔ TECHNOLOGY IS FAST RE-DEFINING CUSTOMER EXPERIENCE IN THE RETAIL SPACE
- ➔ UNIFIED MESSAGING - "A TOOL TO MANAGE SALESFORCE"
- ➔ E-COMMERCE GOING OFFLINE- CONVERGING OF THE TWO MEDIUMS

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The last few months have been quite interesting for the economic sentiment of the nation. Our new finance minister presented his first union budget in the backdrop of gigantic expectations and the awareness that NDA-led new government had limited time to present a budget with firm solutions. For the retail sector, the budget has been neutral but with some sure signs of good intent. The finance minister has announced tax breaks to consumers (raising the minimum threshold for tax and increasing the deductions for housing loans and for investment income) will boost consumption. The policy direction on GST being implemented in FY'15 is good, and reiterates that it will indeed come to pass. The budget has paid due heed to food inflation. The creation of 100 smart cities across India is also a visionary thought. All of these aspects, if executed in the right manner, are sure to benefit the organised retail sector in India both directly and indirectly.

We all hope, the general budget is just the beginning of 'Achhe Din' and hopefully the retail sector in India will get its due under the new regime. Continuing with this positive thought, our annual anniversary issue focuses on the future of retail and what it will look like in the year 2030. In this special issue of IMAGES Retail, we bring you the thoughts of progressive retailers about the challenges, opportunities, what needs to be done, and how. If their wishes come true, it seems by 2030, hopefully we should see India among the top three economies of the world.

In this issue, we also present a range of articles on different aspects of retail. I believe you will find this issue of IMAGES Retail informative.

I also take this opportunity to welcome all of you to the biggest retail event of our country, India Retail Forum (IRF'2014), which will take place on 17 & 18 September at Renaissance Hotel, Mumbai. See all of you there....



Amitabh Taneja

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The opportunity that modern retail sector provides is gigantic and the stakes are high. The challenges are immense and so are the rewards. For this special annual edition of IMAGES Retail, we bring you the views of dozens of modern retailers about the challenges and opportunities facing the Indian retail industry and what needs to be done to unleash their true potential.



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In an exclusive interaction with *IMAGES Retail*, *Amit Bhatia*, Head-Retail Solutions, NEC India talks about importance of technology in retail and how NFC (Near Field Communication) will change things for better in Indian retail scenario.

By Shubhra Saini

TECHNOLOGY IS FAST RE-DEFINING CUSTOMER EXPERIENCE IN THE RETAIL SPACE

Near Field Communication

With multitude of personalised touch points, and faster, safer and more convenient payment options to choose from. At the same time, marketers are continuously looking for innovative solutions that help them enhance customer experience, while reducing the total cost of customer acquisition and retention. NFC (Near Field Communication) is the next generation short-range high frequency wireless communication technology. It allows consumer

to make payments by tapping their smartphone on a contactless payment terminal at retail outlets. At the forefront of this revolution is NEC, with its NFC offerings, which helps consumers conduct secure, contactless payments and transactions with their NFC-enabled mobile phones instead of using cash or credit cards. In addition to the convenience of cash-less, card-less payments, it is also possible to exchange digital content and connect electronic devices safely with the help of NFC.

Service offering for Indian market

NEC has a strong presence in the Indian retail market and has been offering a wide range of end-to-end retail solutions aimed at simplifying operations and bringing down the total cost of operations in the retail sector. To address the Indian consumer's preferences, NEC has a range of integrated touch POS solution, Box POS range and customised retail and billing solutions aimed at segments like F&B, large format retail chains, cineplexes and hotels.

Clientele

We aim to strengthen our foothold in the entertainment, gaming, fashion retail and F&B industry, as these verticals hold immense potential in India. NEC is committed to help brands in adapting new technologies to enhance their customer experience. Today NEC is working closely with one of India's premium and preferred retail entertainment company, PVR Cinemas, by providing them with end-to-end cloud-based e-payment system called NFC e-Money server. Through this technology, the payment system at PVR integrates itself with the mobile device of the customer by facilitating interactivity between the NFC enabled phone and PVR wallet access, for monetary transactions. We are also targeting malls, hypermarkets, quick serving restaurants, convenience stores and other entertainment clients for this technology.

Case Study:

NEC partnered with PVR Cinemas, and entertainment company of



“ NEC partnered with PVR Cinemas, to enhance their customer experience through better payment mechanisms. NEC helps PVR in streamlining their retail functions at a radically low total cost of ownership (TCO).

- Amit Bhatia, Head-Retail Solutions, NEC India

India in 2013, to enhance their customer experience through better payment mechanisms. Through this partnership, NEC helps PVR in streamlining their retail functions at a radically low total cost of ownership (TCO). PVR required a comprehensive retail solution which could empower their customers through smart devices for making payments, and also simplify the billing process by making it faster.

NEC helped PVR by introducing a payment mechanism on the handsets of their customers through NEC's integrated e-money solution using NFC (Near Field Communication) as a

technology. NFC enabled PVR Wallet app is bolstered by NEC, which is the supporting backend provider for the mobile wallet. NEC has provided an end-to-end cloud-based e-payment system called as integrated e-money server to PVR that integrates itself, facilitating interactivity between devices (the NFC enabled phone and PVR wallet access), for monetary transactions. This way, the customers do not have to fetch the credit/debit card while making payments. They just need to tap the phone at the readers installed at specific PVR locations. Once the customer taps the phone, booked amount gets deducted from the mobile wallet.

The integrated electronic money solution provides customers with servers to manage prepaid transactions, balances and user accounts, and also support for customer relationship management (CRM) functions. Customers, typically retailers can select the features they require from a variety of services. PVR saw this use of NFC technology as the something which could be the core of its customer loyalty programme, along with differentiating it from the competition. PVR cinemas installed this technology across 15 cities allowing movie goers to 'tap & pay' for movie tickets and refreshments without using paper or even plastic money.

As a result, PVR has been able to reduce transaction time by 80 per cent as compared to transactions made through any other traditional payment methods and has also helped in boosting sales.





The opportunity that modern retail sector provides is gigantic and the stakes are high. Although the challenges are immense and so are the rewards, but can anyone ignore the fact that many of the global retailers have made it to the Fortune 500 list and Walmart is an epitome example for the same. Retailing today is one of the largest private industries in India and the second largest employer after agriculture. For this special annual edition of IMAGES Retail, in the following few pages, we bring you the views of dozens of modern retailers about the challenges and opportunities facing the Indian retail industry and what needs to be done to unleash their true potential.

By Manisha Bapna

In 1869, the Mumbai Crawford Market could be said to be the first form of shopping centre in India; then in 1874, the Hogg Market was developed in Calcutta (now called as Kolkata). Now known as the New Market, it was designed by an East Indian Railways Architect, R.R. Banya, and named after the municipal commissioner of Calcutta, Sir Stuart Hogg. A decade back, retail dwelled in the 10x10 sq.ft. small shops of Chandni Chowk, Johari Bazaar or Crawford Market ruled by fancies

of the shopkeepers. Not to forget the haat bazaars, open markets and mandis was the place to be. The smell of fresh vegetables and fruits laid out on wet jute matt attracted shoppers every morning with bags to fill. A shopper could just wait outside the shop for a few minutes practically bargaining for every paisa to be spent on the products; they could not cross the wooden barricade to touch or analyse the products or make comparisons with other alternatives. Charminar or Dawat basmati found place only in



World of Titan



Raymond

The effort to bring in retailing by manufacturers like Raymond, S. Kumars, Bombay Dyeing and Grasim came **in 1980s through dealer network pioneered by DCM Group and Bata.**



Bata

select premium shops in the city. One could not find any branded commodities on the shelves and the product packs did not have any price labels, although some products like Volfarm Ketchup, Nirma washing powder or Vicco Vajradanti cream did have a manufacturer suggested retail price (MSRP) pre-printed on the packaging. There are still markets in some parts of India that are yet to taste or experience the glamour of retail. The retail shops sourced their products from a chain of middlemen who marked up the product as it moved from the farmer or producer to the consumer.

Statistically, over 14 million outlets operate in the country and only 4 per cent of them are larger than 500 sq.ft. (46 sq.m) in size. India has about 11 shop outlets for every 1,000 people. Family-run businesses, which lacked the scale to procure or transport products at high-volume wholesale level, limited to no quality control or fake-versus-authentic product screening technology; they had little or no training on safe and hygienic storage, packaging or logistics, no after-sales support or service cash transactions, and no products return concept.

Then the Government of India entered into the so-called retail in rural India via franchisees called Khadi Bhandar purely to safeguard farmers from the whims of producers and middlemen. These stores serve as outlets for products made by the village industry, such as Khadi, matchsticks, incense sticks, decorative items made from wood and earth, 'ahinsak' (non-violent) honey, 'ahinsak' leather items, etc.

The concept of shopping centre came into existence in year 1869, with Mumbai's Crawford Market and Kolkata's New Market earlier known as Hogg Market, in the year 1874. The underground shopping complex, Palika Bazaar, in New Delhi was established in the late 1970s and mini malls cropped up on the Bengaluru Brigade Road in the '80s. The effort to bring in retailing by manufacturers like Raymond, S. Kumars, Bombay Dyeing and Grasim came in 1980s through dealer network pioneered by DCM Group and Bata. Titan introduced the concept of organised retail and established a number of showrooms for premium watches.

Until the 1990s, regulations prevented innovation and

entrepreneurship in Indian retailing. But the pure retailer approach came to the fore in 1999 with the establishment of Ansal Plaza in New Delhi and Crossroads in Mumbai. India in 1997 allowed foreign direct investment (FDI) in cash-and-carry wholesale businesses with prior government approval, which was later relaxed and made automatic in 2006. During 2000 to 2010, Indian retail attracted about US\$ 1.8 billion in FDI, representing a very nominal 1.5 per cent of total investment flow into India.

Until 2010, intermediaries and middlemen in India dominated the value chain, hence making margin norms and pricing of produce ambiguous. This, in turn, led to the stagnation of growth and innovation in Indian retail industry.

Between 2000 and 2010, consumers in select Indian cities had gradually begun to experience the quality, choice, convenience and benefits of organised retail industry.

Until 2011, the Indian central government denied FDI in multi-brand retail, forbidding foreign groups from any ownership in supermarkets, convenience stores or any retail outlets. Even single-



LUXURIOUS WRITING

By Kanak Prabha

William Penn is among the world's biggest multi-brand retail chains for luxury writing instruments and accessories. The retail chain features over 20 well-known international brands such as Sheaffer, Caran d'Ache, Lapis Bard, Lamy, and Sailor to name a few. William Penn also retails top-quality men's accessories from international brands like Dalvey, Lapis Bard and Sheaffer. William Penn currently has 26 outlets spread across Bengaluru, Mumbai, Delhi, Hyderabad, Chennai, Kochi, Kolkata and an online store www.williampenn.net. **Nikhil Ranjan**, CEO of William Penn talks about the current trends in the Indian luxury market and growth plans of the brand.

Starting from scratch

The brainchild of Nikhil Ranjan, William Penn was started in 2002 in Bengaluru, India. It was a unique, stand-alone store dedicated to the fine writing instruments and writing accessories. Ranjan noticed a huge number of customers who were constantly on the lookout for a good writing instrument. He also noticed that there was a need for the customers to realise the importance of a good writing instrument, and hence decided to address this by having a first-of-its-kind 'Pen Fair'



in 2002. The event spanned 4 days and was a phenomenal success. Over 6,000 people visited William Penn during the Pen Fair. This got Ranjan thinking further and he opened an exclusive 'Pen Store' in the country at Forum Mall, Bengaluru. William Penn remains India's only multi-brand retail chain for fine writing instruments.

Product portfolio and growth rate

William Penn has retailed over 1,000 products and their average price starts at ₹1,000 and goes up to a few lakhs for limited edition pens. The brands average bill size is between ₹5,000 and ₹6,000 at the city stores and between ₹6,000 and ₹7,000 at the airport stores. Talking about the growth rate of the brand, Ranjan shares: "We have had a double-digit growth rate in the past few years and this year we expect to repeat the same."

Store format

Currently, William Penn has 21 stores and 5 shop-in-shops across 7 cities in India. The average store size is between 450 sq.ft. and 600 sq.ft. According to Ranjan: "India has one of the fastest growing luxury

TOP 10

Annual makeover of the store encourage the footfall and also increase the sale. *Ashmit S Alag* pens down some tips for those who want to give a makeover to their existing stores.

IDEAS FOR STORE MAKEOVER



During this time of the year the fashion industry is abuzz with fairs and bookings, and preparing for the forthcoming Fall Winter season. In fact, the idea of redoing the look and feel of the stores is also tickling the minds of several retailers. To accelerate the same thought we suggest the Do's and don't's of redoing the stores for the next season.

01 Do not spend excessive money on 'flexible features' of store fixtures Assess carefully how much flexibility you need and then order that little part separately. Majority of retailers spend excessive and unnecessary amount of money on 'modular or adaptive features' of a fixture and never use them. Spend no more than 20 per cent of what you spent on the last renovation.

02 Lighting plays a much larger role than you might think. Invest in the right colour temperature, right lumen quantity and right amount of focus. The shadow factor of each luminaire makes a big difference and

allows you to create depths in the display. Choose the colour of your lamp based on the opulence and detail-centricity of the merchandise you want to use this light for. As a rule of thumb, yellow lamp colour works better for premium and warm brands, while bluish-white brings dynamism, youth and pace into the space.

03 Sense of sound: It is a strong determining factor whether the client is going to speed up or slow down. Invest in the right kind of sound, and it does not have to be expensive at all—just clean and able-deliverer for the music that you play. Your selection of music must always communicate your stand as a brand while also consistently providing a positive, lighter feel, which is a human emotion conducive to shopping. Youth-centric stores must also add at least a subwoofer to 'mean' the music they play. Quality and assertive sound creates a deep impact psychologically and allows potential customers to disengage from their regular thought process and become more subversive to what is playing and the environment.



MERCHANT OF STYLE **MYNTRA GROWS BUSINESS** ON NETMAGIC'S DATA CENTER INFRASTRUCTURE

The online fashion retailing industry in India is burgeoning, and it owes a lot to the country's large population on the Internet. As of 2012, Internet user base was about 137 million—with penetration of Broadband Internet growing at a whopping 20 per cent per month. There is also a growing community of mobile Internet users, which is currently estimated at about 27 million.

According to Forrester Research, the e-commerce market in India is the fastest in Asia Pacific region with CAGR (Compounded Annual Growth Rate) of over 57 per cent between 2012-2016—worth USD 2.5 billion in 2009, went up to USD 6.3 billion in 2011, and to USD 14 billion in 2012.

Within the online retail industry, the online fashion segment is growing fast. Numerous online retail sites have been launched in the past few years to claim their share of the space.

Competition has forced small and big online fashion shops to innovate to try and stay ahead of competition. Their success in sustenance and growth depends largely on delivering high quality user experience, website performance, modes of transactions (debit and credit cards, payment gateways, CoD, etc.) and simple and improved online user experience, and competitive pricing.

Merchant of style, Myntra.com

Myntra Designs (privately held organisation) was established by three IIT alumni Mukesh Bansal, Ashutosh Lawania, and Vineet Saxena—founded in a three-bedroom apartment in south Bangalore—in February of 2007. Myntra has been funded by Venture Capital funds like IndoUS, IDG and Accel Partners.

The company started off in the business of personalization of products, and soon expanded to set up regional offices in New Delhi, Mumbai and Chennai. It began

ORION

ORION EAST

EAST BANGALORE'S UPCOMING LIFESTYLE HUB



WELCOME, ORION EAST

Following the stupendous success of Orion Mall at Brigade Gateway in Bangalore, the Brigade Group is now developing Orion Mall 2 in the established East Bangalore. This second mall development named 'Orion East' will be the only lifestyle mall in about a 7 km radius, and will serve as the destination of choice for a young population in the upmarket areas of Fraser Town, Benson Town, HRBR Layout and Kamanahalli. With Brigade Group and Orion Mall's impressive track record in design, development, marketing and operations management, Orion East is poised to make a mark yet again in Bangalore's retail landscape.

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HARLEY DAVIDSON AT THE RUNWAY



INTEL PROMOTION AT CENTER COURT



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Established in 2007, Virtuous Retail (VR) is an institutionally owned developer-operator of community-oriented premium Lifestyle Shopping Centers in India's top cities. Virtuous Retail's pan-India portfolio includes prime city center locations in Bengaluru, Chennai, Mumbai, Pune, Surat and Kolkata.