

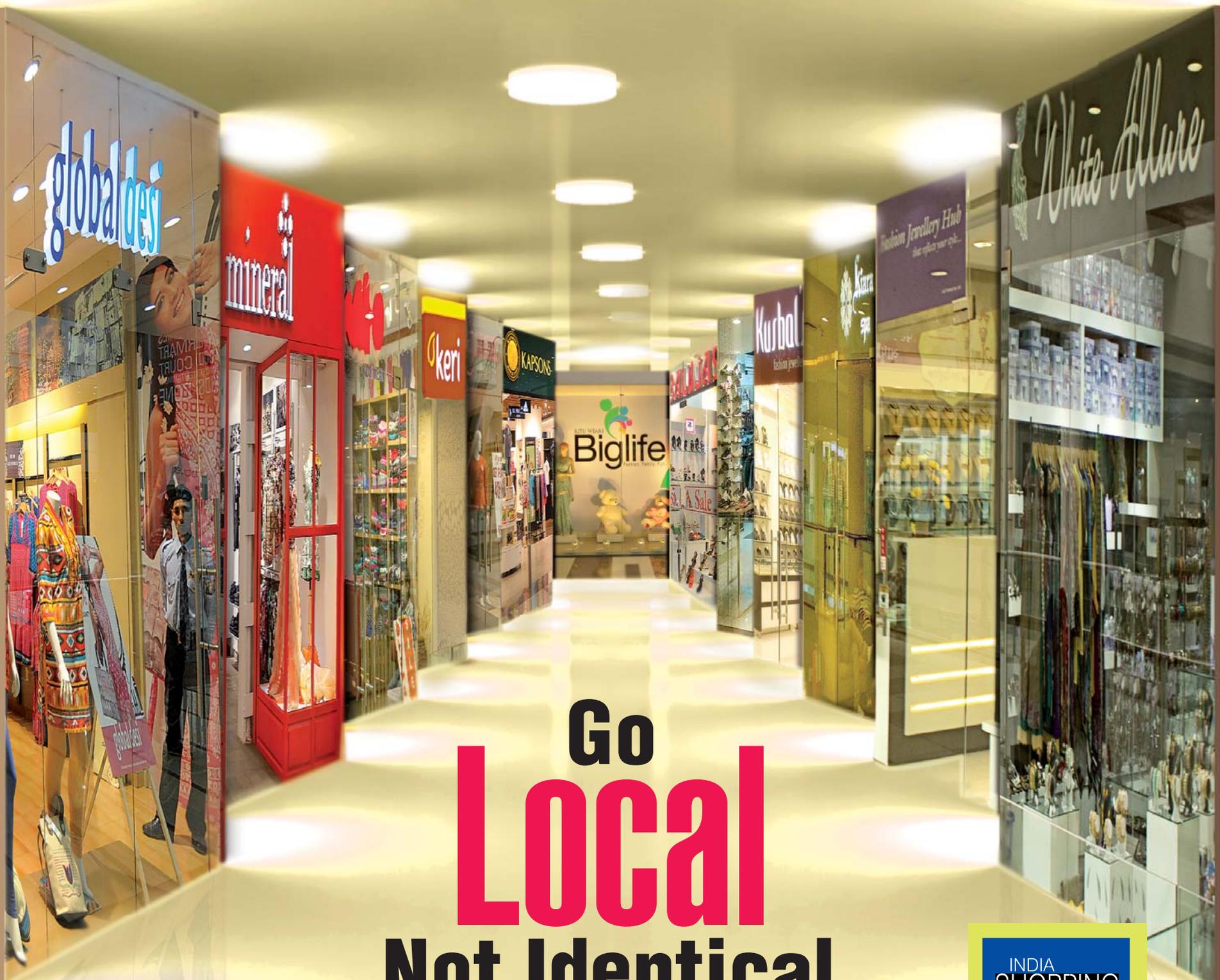
Shopping Centre

News

APRIL-MAY 2013

DEVELOPING RETAIL IN INDIA

VOL. 6 NO. 3 ₹100



Go **Local** Not Identical

**Malls Add Regional Flavour
to Differentiate**

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Malls are many but only a few have tasted the success. These are the ones that are able to crack the mall code by providing right location, positioning, tenant mix, marketing, management and customer experience.

As they say "First impression is the last impression." Visitors start making their perception about the mall right from the parking area -- the place which seems relatively unimportant has started gaining a lot of importance now.

Malls across India are continuously trying to woo more customers and give them one or the other reason for repeat visit. One such attempt is to give local flavour to malls by housing regional retailers, who know the tastes and preferences of the catchment better than others. This becomes all the more important as today's customer owes no loyalty for a shopping centre unless it meets their high-end expectations and has something unique to offer.

National and international retailers are necessary to create the brand positioning of a mall, regional players add uniqueness to it -- which helps them stand out in the crowd. As these retailers provide a comfortable shopping experience to customers, they fit well in the catchment choice and act as a major crowd puller for any mall.

Malls also provide modern infrastructure conducive for regional retailers to maximise their efficiency. Professional management and ability to attract more footfalls are the other major reasons for these players to expand to malls.

While malls provide benefits of consistent footfall, modern infrastructure and promotions, there exists challenges

too. Regional retailers are hesitating to enter these premises due to higher rents and CAM charges. Here comes in picture the role of the mall developers, who can build their confidence by allowing certain flexibility in terms of rental and infrastructural support.

Not only the tenants but the promotional activities in malls should also be in accordance with the local audience. Every activity and event should be customer-centric and catchment-centric. Customers will be drawn to events and other activities that gel with their ethos. There is no "one size fits all" here.

Also, malls should not forget their employees who play an important part in the success of their property. To retain good staff, mall owners must give the best possible working environment.

By keeping all these things in mind, the chances of success of a mall will surely increase and each acre of land will turn out to be "acre of gold."

To improve the chances of success for all the stakeholders of retail real estate industry, IMAGES Group invites the industry leaders and experts to take centre stage at its annual event -- India Shopping Centre Forum (ISCF) -- to be held on May 8-9 in Mumbai. The forum will help bring together the leading retailers and brands, shopping centre developers, consultants, financial institutions and support companies on a platform where prospective alliances can be formed and a path for the future defined.

See you at ISCF 2013!



Amitabh Taneja

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Go Local, Not Identical

In today's competitive world where most of the malls house similar tenants, what would differentiate one from the other? The answer lies in localising the mall in tune with the local needs and preferences of the catchment. This becomes all the more important as today's consumer owes no loyalty for a shopping centre unless it meets her high expectations and has something unique to offer

The views expressed in the guest articles are those of the respective authors. The editor and publisher may not necessarily subscribe to the same.



Go Local,



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By Payal Gulati

S

hopping centres nowadays are adopting various unique practices to attract more footfalls and differentiate their property from others. One such attempt is to give local flavour to malls by attracting regional players.

The Regional Touch

While national and international retailers set the brand positioning of a mall, regional tenants add uniqueness to it, which help them stand out of the crowd. Stressing that there should be a fine balance of national, international and regional retailers in any particular mall, Surjit Singh Rajpurohit, CEO, Neptune Magnet Mall, states: "Regional brands provide a comfortable shopping experience to customers. Also, majority of Indian women buy traditional outfits, which contributes towards the growth of regional brands. Thus, these brands make a great customer base and act as a major crowd puller for any mall."

Not Identical



The Recipe for a Successful Mall

The concept of shopping malls existed even before they came into being. The term "mall" refers to an open area where people can walk. Right from medieval times, people went to outdoor bazaars to purchase goods. These bazaars became major trading spots. Gradually, the outdoor bazaars led to covered market places, which eventually gave way to indoor shopping centres. As the indoor shopping centre grew in size, so did its complexity; it was christened "mall." Malls became a rallying cultural point for people of all age groups. They have been around in the West since the early 20th century, but became fashionable in India only during the first decade of the new millennium.

Shopping centres today house stores carrying various types of branded merchandise, along with other attractions such as entertainment outlets,

With malls becoming the preferred choice for shopping these days, it is clear that the retail real estate industry in India has a promising future with lots of growth opportunities. However, managing a complex entity such as malls is not easy. Therefore, it has become all the more imperative for mall managers to take into consideration the needs of all the stakeholders such as customers, retailers, employees and statutory bodies

By Surjit Singh Rajpurohit

food plazas and gaming zones. They are the ideal place for families to spend quality time and bond with each other. That is the secret behind a mall's success: it must have something on offer for all the members of a family. Indian families tend to be close-knit and extended; hence, the mall must suit the interests of at least three generations of individuals. Modern-day malls take into account the customer's complete needs and include diaper changing and prayer rooms, a pharmacy and a dry cleaner. They also have ATMs and cab services. A business centre, bookstore, baggage counters and a lost and found centre are also some of key features in malls.

Sensory Experience

A mall is a sensory experience. It should be strategically situated so that it is accessible by people from the surrounding localities, through various forms of public and private transport. The excitement must begin at the threshold. The parking lot should be of appropriate size, have multiple entry and exit points and must provide the shortest walk to most indoor units. From that point on, the devil is in the detail. The senses must be satiated, the curiosity aroused. Once inside, the experience should be futuristic and enticing.

There are two elements ensuring a mall's success -- a mall manager has to be finely tuned to the pulse of the local market and that the zoning of product categories are planned in a manner to maximise inter-product synergies. Malls have now brought branded merchandise in apparel, cosmetics, shoes, watches, beverages, food and jewellery to the doorstep of the Indian consumer. Retailers who are accepted by the

community should be the primary choice as tenants. It then becomes the joint responsibility of the management and the retailer to make sure that the latter carries brands that are popular with the target market. It is very important for a mall manager be up to date in mall's catchment analysis. In a city like Mumbai, customer profiles can vary markedly from one location to another; what is fashionable in one area may not be in vogue in another.

The other element is the planning of attractive marketing initiatives to bring in adequate footfall because the right footfall will result in good business. And in the end, retailers want business. Every activity, every event must be customer-centric and catchment-centric. Customers will be drawn to events and other activities that gel with their ethos.



EVERY ACTIVITY AND EVENT MUST BE CUSTOMER-CENTRIC AND CATCHMENT-CENTRIC, AS CUSTOMERS WILL BE DRAWN TO EVENTS AND OTHER ACTIVITIES THAT GEL WITH THEIR ETHOS

There is no "one size fits all" here. Activities are best carried out jointly by the retailers and the mall management. Retailers' suggestions can be very valuable and should be incorporated in the

marketing plan. They will go a long way in enhancing the customers' shopping experience. In order to sustain that positivity, it is the management's prerogative to demand proper discipline from the retailers. A mall manager must insist that stores observe regular working hours every day, even if there is resistance from

the retailers. Proper communication channels with the retailers must be kept open at all times.

Also, the importance of social media tools (such as Facebook

and Twitter) should not be underestimated as these are the fastest medium to reach out to vast audience at once. Hence, there must be regular mailers and updates about the launch of new stores, collections, ongoing offers/ discounts and events. This will keep the target audience abreast about latest developments.

The retailers in a mall should be chosen carefully, keeping in mind the demand, category, competency and uniqueness of their offering. Based on their visual merchandising, business category, operating costs, stock turnover and profit margins, they should be assisted in choosing the most appropriate location within the mall in alignment with the shoppers' buying behaviour. Each floor should have a unique trade mix that caters to diverse buyers and brings about equal footfall on all the floors.

Disaster Management Plan

With their large and diverse populace that is focussed on varied activities at any given time, malls



Growing Mall Culture in East India's Tier II & III Cities

W

hen particularly talking about the East India, Kolkata has so far been the hub of all the retail activities. And now when the city is saturated as a market and has many operational and upcoming mall projects, the obvious choice for the mall developers to grow further is the tier II and III towns of the region. Few of such cities on developers' radar include Siliguri, Asansol, Durgapur, Guwahati, Dhanbad, Ranchi, Bokaro, Jamshedur, Muzaffarpur, Patna, Bhubneshwar, Rourkela and Cuttack.

According to Kashish Vyas, Director, Innovative Infra Projects, which is having an upcoming mall "Centre Point" in Dhanbad: "Condition of tier II and III markets is pretty good. These are untapped markets and have great growth potential. As we all are aware that retail real estate market in metros and tier I are saturated and rentals are sky rocketing, it is a right time and will be a pragmatic decision on retailers' part on the growth story of tier II and III towns." "A lot needs to be done to harness the true potential of these cities of having many malls. I believe at the moment all important tier II and III towns should at least have one to two malls, and in a radius of 5-6 km we should have malls in these regions, in order to build a true modern retail culture in these regions," Vyas adds.

"From the past few years, the hot spot for retail market in India is tier II cities and will continue to be for the retail real estate investors. Tier II and III markets would emerge as most sought-after real estate destinations in the coming years. Factors leading to growth of such areas are the saturation of metros cities. East India's tier II and III markets can afford to have more malls," says Balmukund Kadmawala, CEO, Pluto Plaza, who have an upcoming mall in Rourkela.

With the development of the modern retail sector in India, the face of retailing has begun to change, especially in major metros and tier I cities. As the retail market of all the leading cities are getting saturated, retailers are slowly entering in tier II and III markets, which are the untapped virgin markets with great growth potential. Another reason for their shift is the changing shopping trends in such cities. In recent years, a radical shift from the conventional trader-run stand-alone shops to more organised and large retail mall formats has been witnessed. To facilitate the growth of retail in these locations, many developers have come up with their retail real estate projects in the tier II and III markets of the Eastern region of the country

By Shubhra Saini

Despite the political discrepancy, which is faced by many developers and retailers, tier II and III cities still remain like a jigsaw puzzle for many developers. It is observed that these million-plus cities in India continue to provide sustained growth for the retail sector but still remain largely untapped despite the growing purchasing power. And mall developers in these fast-growing cities should realise that their presence here is really important for the growth of the modern retail.

Being optimistic about markets of tier II and III locations in East India, Shubhojit Pakrasi, Head Mall Operations, The Junction Mall, says: "Future is bright here. People who can overcome the economic slowdown conditions in B and C+ towns will absolutely gain not only as a brand but also as a profitable venture." The Junction Mall, from the house of Shracchi & PGE Group, is an operational shopping centre in Durgapur.

Research is the first and the most important process that needs to be conducted by mall developers to determine the sustainability of projects in tier II and III cities. Pramod Dwivedi, Head Marketing, Ambuja Neotia, says: "Tier II and III towns can be very viable as well as a risky proposition. It all depends on the mall management. If your

mall management is correct, then these regions are perfect for you to venture as a mall developer. There are plenty of opportunities that these towns will bring, but you should know how to tackle them. For example, at our City Centre mall in Siliguri, we have many large-format stores such as Spencer's, Max, and Reliance Trends and all of these brands are doing extremely

well and not cannibalising each others' business." Ambuja Neotia has operational malls in Kolkata and Siliguri and upcoming projects in Raipur, Haldia and Patna.

Before venturing into any new market, mall developers should ideally conduct primary and secondary research, which includes local econometrics and cycles, retail and residential trends,

lifestyle demographics, shopping patterns, consumer expenditures and syndicated consumer research. If this research is done in a correct way, it will indicate whether a mall developer should enter the market or not.

"Retail real estate market in East India's tier II and III towns is constrained by supply. Brands aligned to demographics and taste have done well; all the current real estate is unplanned and hence is not adequate to support business/volume growth. The above needs to be evaluated in light of the fact that these centres are growing rapidly on account of increased working age population, catch up with rest of the country, faster urbanisation (East is the least urbanised part of the country); hence, they will do well with additional malls. Mall operators need to balance the challenge of landbank (as due to unplanned urbanisation, it's tough to get large commercial land) vis-a-vis connectivity (as undeveloped infrastructure makes it tougher to have destination malls outside the city)," suggests Shaswat Kumar, Director, ST Marketing, who have an upcoming mall in Muzaffarpur, Bihar, by the name of Dwarika City Center.



Junction Mall, Durgapur, from the house of Shracchi & PGE Group

The Luxury Wave

With the rapid growth of fashion retailing in India, the future of luxury malls seems to be promising and full of potential for fashion retailers. In order to meet the growing demand for luxury retail space, shopping centre developers should introduce exclusive features and be more creative in differentiating their luxury malls from the ordinary ones

By Anuj Puri

Since the beginning of mall culture in India in 1999, fashion retail has been on the forefront of the revolution. When it comes to the overall corpus of retail space transaction happening in the country today, this segment is definitely a leading and highly influential stakeholder. Today, fashion retail in India is highly competitive and there has been an avalanche of global fashion brands making an entry into the Indian market. Needless to say, the increasingly aspirational Indian shopper community welcomes each new signpost and milestone on the road to organised fashion retail. Indians trace back their awareness of and appreciation for international apparel brands to the country's Colonial times, and there is no doubt that cutting-edge fashion will always enjoy a place of honour and high potential in the country.

Retailers are experiencing a year-on-year growth in sales of their private label brands because the margins on such products are higher as retailers are able to control the sourcing and manufacturing costs of the same at the back-end, and marketing through their departmental stores at the front-end.

Typically, international luxury retailing has two key requirements to flourish in any market - brand awareness and high disposable income. These two components,



currently, are present in the three key metros of India - Bangalore, Delhi and Mumbai, with their urbane, well-travelled and high income population keenly aware of global trends and extremely eager to replicate these at home. Hence, the rush of luxury malls and hotel arcades has been witnessed in these cities. With high demand and limited supply, rentals at such places have been rising too.

Mumbai has an ideal mix of corporates and business families; people there are fashion conscious and enjoy being so without being

obsessive. The elite in India are growing at 20-30 percent. The country already has a significant number of billionaires, almost half of who are new to the list. Mumbai is India's business capital where most high net worth individuals are residing who are status conscious, and fashion retail is constantly geared to capture them. Nevertheless, even in Mumbai, fashion retailers underwent major reorientation after the economic slowdown. The elite are no longer the primary target, though high-end fashion (as opposed to luxury

fashion) still has a significant part of the overall audience. To increase their margins, fashion retailers in Mumbai and other metros have now begun concentrating on developing private label brands catering to categories such as fashion, office and casual wear segments.

High rent has been the primary concern of luxury fashion brands in India. These have been putting a spanner in the works for their expansion. Globally, the cost of real estate is typically 8-10 percent or at the maximum 15 percent of the

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