

IMAGES

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NOVEMBER 2016 VOL.15 NO.11 ₹100

GENX

LESSONS FROM THE IGNORED GENERATION

SUCCESS STORY



Croma:

Pioneering the New Age
CDIT Retailing

RETAIL DEBUTANT



Aéropostale:

Iconic American Brand is
Optimistic about India

ECOMMERCE



Zivame:

The Lingerie
Retailing Destination

DYNAMICS



Jewellery Retailing
Shining Bright



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Amidst all the hype about Baby Boomers and Millennials, marketers appear to have virtually forgotten about a generation that should not be overlooked: Generation X or those born between 1960 and 1980 – now ages 35 to 55 years old. Few marketers seem to be focusing on the demands and needs of this profoundly influential generation. But the fact of the matter is, they cannot afford not to.

Despite their small numbers, the influence of Gen X is unquestionably mighty. Gen Xers' connection toward generations before and after (Millennials and Boomers), as well as their technological savviness and brand loyalty make them an exceptionally unique consumer base. And because of this heavy influence, Gen Xers also have enormous buying potential.

As the bridge between Boomers and Millennials, Gen Xers have more influence than marketers even realize, particularly if they are financially supporting both aging parents as well as young adults. From digital devices to clothing brands, and retirement homes to healthcare options, it is Generation X who holds the majority decision-making power over many individuals in the Boomer and Millennial generations.

Indian brands have chosen to pamper the flirtatious non-committal generation of millennials over the more value-driven, brand loyal generation of Gen Xers that precedes them. The cover story of November issue of IMAGES Retail attempts to understand how addressing generation Gen X -- who is as vivacious about living and spending as the younger counterpart -- can open up a whole new market.

Apart from this imperative and insightful study on the small but mighty demography of 'Gen Xers' in this issue, we have also carried out an intriguing feature on start-ups that could change the business of retail and a SWOT analysis of the current modern jewellery retail market.

Other regular sections include features on brands such as Zivame – one of the best e-tailing innovations ever; inside Aéropostale's India strategy and a salutation to the success of CDIT major Croma.

With the wide-ranging content that this issue offers, I am sure you will find our November edition extremely informative.

Amitabh Taneja

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ALL THAT GLITTERS

The new face of jewellery retail in India is a far cry from the investment-driven approach of the earlier days. In addition to the shift to modern brand stores, the entry of metals other than gold into mainstream jewellery consumption has also provided more variation to an already extensive range of jewellery for consumers.

By Shubhra Saini

The jewellery market in India is one of the largest in the world. With a multitude of players in both organised and unorganised spaces, consumers are spoilt for choice. According to a recent report by the Indian Brand Equity Foundation, the overall gross exports of Gems & Jewellery in April 2016 stood at US\$ 3.23 billion, whereas exports of cut and polished diamonds stood at US\$ 1.78 billion. According to a report by Research and Markets, the jewellery market in India is expected to grow at a Compound Annual Growth Rate (CAGR) of 15.95 percent over the period 2014-2019.

According to India Retail Report 2015, total jewellery retail market is worth ₹2,01,344 Cr (US\$ 33.56 bn) growing at 24-26 percent and is expected to reach ₹383,000 crore (US\$ 63.87 bn) by 2017. Modern retail is estimated at 10 percent of this total market and is expected to grow at a little under 22 percent.



Sharing the opinion on future prospects of jewellery market in India, Sunayana Vora, VP - Retail, Tara Jewels, says, "The jewellery market in India is expected to see reasonable growth in the coming years. There is a dynamic change in consumer preferences due to exposure which has made the customer more astute and aware about trends and quality."

"Branded jewellers are more equipped than the local organised players to appease consumers' growing demand for design innovation and variety. An increase in disposable incomes has also been an important factor for an increase in sales of jewellery. In India, customised jewellery is a niche market and is showing significant growth year-on year

and would likely take precedence in near future," she adds.

Adding to this observation, Jitender Jain, CEO, Entice, opines, "The current jewellery market is growing, but cautiously. Customers are spending wisely and looking for value of money. Customers are also now gathering quite a lot of education on jewellery and thus, going ahead, buying would continue to be cautious as jewelley transactions involve a large sum of money. India is gaining a lot of attention on a global scale and thus, in the next five years we see more and more international clientele added to our Indian client lists."

Consumption: Typical and New-age

Jewellery as a category has diversified market segments in terms of its contents – material used, purpose, price value and type of products. As far as content is concerned, gold jewellery rules the market with 72 percent share followed by diamond studded jewellery with 22 percent share. Based on the purpose of wearing, ceremonial or bridal jewellery accounts for the largest chunk. Fashion wear constitutes the lowest share on the occasional aspect.

We Indians have an unending appetite for gold and there is a sentimental as well as aspirational value attached to the yellow metal. There is a segment amongst the consumer that still prefers gold as one of the safest investment options and the industry has been identified as one of the growing sectors by the government.

Indians are the largest consumers of gold in the world where there is huge potential in the market and the industry is expected to grow at the pace of 10 to 15 percent in the next five years.

"Gold is the all-time favourite metal because of the relationship it shares with the consumers," explains Aditya Pethe, Director, WHP Jewellers.

"Diamond jewellery has emerged in last 10 years while silver and platinum are still establishing themselves in the Indian market. In fact, there is a growing demand for silver as a replacement for fashion jewellery; consumers are opting for the pleasure of acquiring a precious metal at a smaller ticket size, while also investing in more contemporary and edgy products. This also led to the launch of our latest innovation, IZAARA, a premium silver jewellery brand," he adds.

Elaborating on this trend, Vijay Jain, CEO and Director, ORRA, notes, "Traditionally the industry has been biased towards gold with an 85 percent preference for gold, with the remaining 15 percent for diamond and platinum. Demand for the three can be segmented based on both market segmentation and consumer psychographics. Currently, the rate of growth of diamond and platinum however, is twice that of gold. Silver jewellery is perceived more as fashion rather than precious jewellery."

The Indian jewellery Industry is slowly moving away from 'one size fits all' ready-to-wear jewellery to more customised pieces. The desire to own a unique or signature piece is permeating into different sections of society. There is a shift from very heavy gold jewellery to light and contemporary jewellery for daily use. Customers are buying trendy jewellery in gold and platinum with a variety in gemstones combinations.

In India there are cultures, traditions and geographical differences which influence regional consumptions and tastes. These influences are based on content type, quality of material used, kind of jewellery and the buyer. Traditionally, consumers from east and south of India consume more gold than their counterparts in north and west of India owing to tradition, festivals and ceremonial demand. Designs in these markets are also typically traditional. Northern and western Indian



GEN X

CASH RICH, BRAND STARVED AND A BIG OPPORTUNITY MARKETERS PREFER TO IGNORE

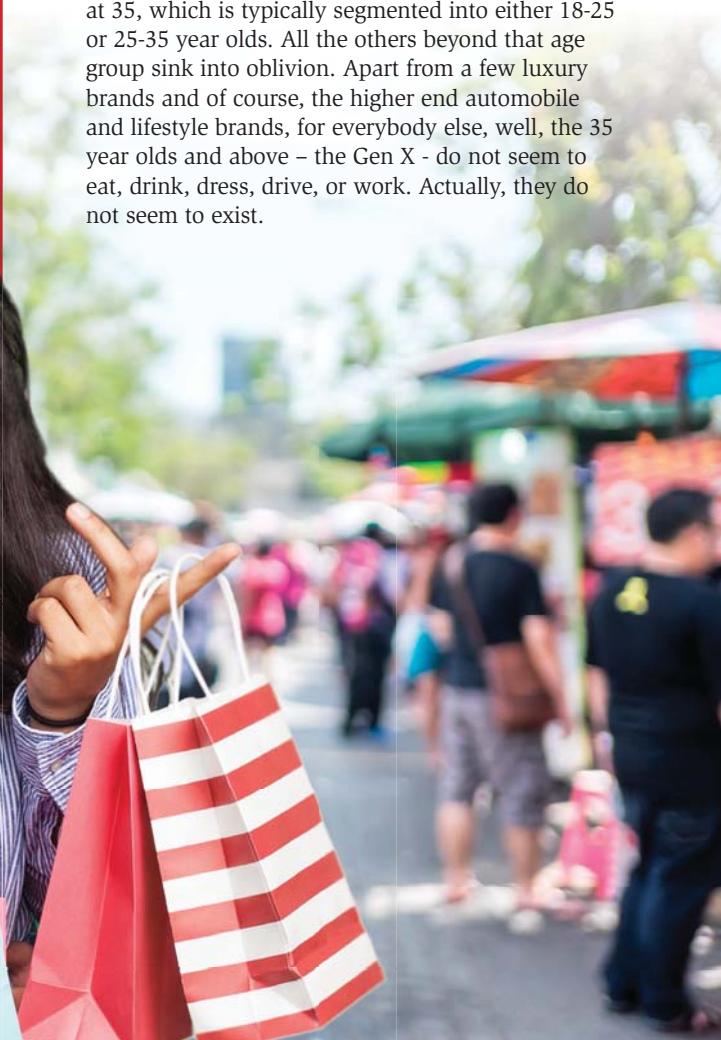
Youth is king! Nobody exemplifies this better than Indian marketers. For a whole decade or so, Indian brands have chosen to pamper the flirtatious non-committal generation of millennials over the more value-driven, brand loyal generation of Gen Xers that precedes them. What the reasons are for this, we cannot say. However, in this article, we attempt to understand how addressing this generation - who is as vivacious about living and spending as the younger one - can open up a whole new market.

By Sheetal Choksi and Sharmila Cirvante



Open any advertisement in any media and you'll be greeted by an abundance of youth. Young happy millennials urging you to dress smarter, eat healthier, go off-road with the latest hybrid, attract the opposite sex by smelling better, flaunt the latest phone, and more. And why shouldn't they? More than 65 percent of India's population constitutes the young and the restless that fall below the age of 35. Majority always wins!

A bit of statistics to prove this: in 2011, almost 701 million from a total of 1.2bn estimated Indians were under the age of 35 years. It is 2016 now and that number would have put on some weight. Is it surprising then that most retailers and brand marketers prefer to woo this extremely large base of consumers? Every time we hear brand and marketing managers define their target audience demographic, the age band seems to draw the line at 35, which is typically segmented into either 18-25 or 25-35 year olds. All the others beyond that age group sink into oblivion. Apart from a few luxury brands and of course, the higher end automobile and lifestyle brands, for everybody else, well, the 35 year olds and above - the Gen X - do not seem to eat, drink, dress, drive, or work. Actually, they do not seem to exist.





Gen X is a demographic cohort that precedes millennials. Typically born between 1965-1976 (the age band varies according to the expert who defines it), **they are currently aged between 36-50 years**

No one talks to them

"Once you've reached the age of 40, you're supposedly over the hill", laments Anil Chaturvedi, 56, a senior investment banker and a very influential Gen Xer. "I can't even find a decent shirt in my size. With this newfangled trend of slim fits, tailored is the only option. Has slim fit ever thought of my paunch?" Nisha Khanna, a 45 year-old housewife feels self-conscious to wear her newly purchased walking shoes. "They are neon!", she laughs. "That was the only colour available - a colour that's great for my kids. I had no choice. Worse was when I overheard a group of teenagers sniggering and referring to me as "buddhi ko jawaani aa gayee" (old lady is trying to look young), she says slightly embarrassed.

Fortunately, there are still a few brands that have not been swayed by the youthful swagger of millennials and have stayed true to their original audience and regard Gen X as their core customers. Raymonds Made to Measure and Zodiac continue to provide shirts beyond slim fits while Marks & Spencer offers men's trousers with adjustable waists.

BUT WHY ARE WE GOING ON AND ON ABOUT THIS GEN X, YOU ARE WONDERING.

A forgotten target segment

As the authors of this article and marketing professionals who don't belong to the millennials, we often wonder why the needs of us Gen X are totally ignored. Either brands have stopped manufacturing for us or we need to crawl out of the woodwork and snap our fingers to draw their attention. Do they think we are too old or too old fashioned or too poor? Has anyone from their marketing department even considered the advantages of talking to this age cohort?

Gen X is often brushed off with "we will focus on the 28-30, the young aspire to be like them and the older always aspire to be younger". A strange and surprising premise especially considering some of the lead decision makers in the world of retail belong to Gen X. We believe that in the race to get a large chunk of the largest pie in the market, marketers are often overlooking and ignoring a niche that constitutes an extremely rich and influential generation of consumers.

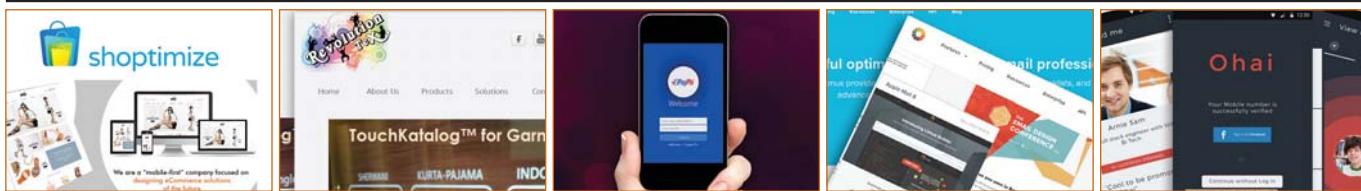
LET US BREAK A FEW MYTHS ON THE GEN X FOR THEM, SHALL WE?

Who are the Gen X

First, let us begin by defining them. Gen X is a demographic cohort that precedes millennials. Typically born between 1965-1976 (the age band varies according to the expert who defines it, but almost all will lie between 1960-1980), they are currently aged between 36-50 years.

In the West, Gen X is often termed the "sandwich generation" (the children of the earlier boomers and parents of millennials), but in keeping with cultural context, we prefer to call the Indian Gen X the "bridge generation". This is the generation that seamlessly bridges the previous one that lived a life based on a conservative socialist economic model, with the current crop of millennials who are born into a capitalistic India. The bridge generation is the one who not just witnessed, but also adapted to the maximum changes in lifestyle, relationships, mindset, values and technology.

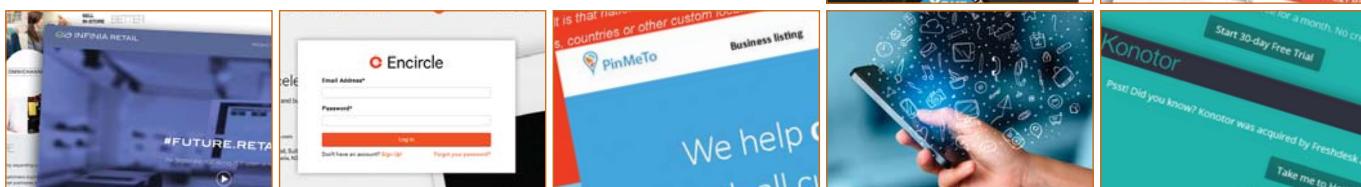
As Deb Freeman, Chief Strategy Officer, FCB, aptly puts it, "You can call them the



START-UPS THAT COULD TRANSFORM THE BUSINESS OF RETAIL – 1

In terms of the number of firms, India is still the third-largest start-up ecosystem in the world. China and Israel are not far behind, though, and the US leads by a huge margin. With a total funding of approximately \$4 billion, close to 650 start-ups were funded last year, signifying a healthy growth of the ecosystem. Over 30 new academic incubators have been established under the government's 'Start-up India Stand-up India' initiative this year, and tier-II/III cities have established 66 percent of the new incubators. With regard to investments, investors are increasingly looking at opportunities in start-ups in areas other than online retailing. Ventures in fintech, healthtech, edutech, data analytics, B2B commerce and artificial intelligence, are seeing rising interest. In this first segment of a roll-call of 40 start-ups that could potentially alter the business of retail in India, we present 15 potential game changers.

By Parama Sen



SHOPTIMIZE

Shoptimize takes consumer brands online and helps them set up a successful online sales channel. Its solution spans technology, marketing and analytics and its clients have seen aggressive growth in sales of over 100 percent in a span of three to six months. Some of its clients include Haldiram's, Apollo Pharmacy, Wonderchef, Killer Jeans, Tata I-Shakti, Mother's Recipe and Gits Food.

Area of expertise: E-Commerce - technology, marketing and analytics.



REVOLUTION TEX

Founded in 2012, Revolution Tex is an interactive design and development studio that crafts magical experiences for computers that don't look like computers. It uses revolutionary technologies and creates disruptive innovation to revolutionise retail.

Solution for the retailers: TouchKatalog™ is a touch-screen catalogue; a very first of its kind. A user can browse through and compare all the items in the catalogue. After finalising the selection, the user can take a printout of the items and hand it over to a sales associate, who will display those items physically. The user can try out those items physically and then finalise only items which he/she wants to buy. TouchKatalog™ can be used in multiple retail categories, including accessories, clothing, F&B, cosmetics, home improvement, duty free merchandise, electronics, eyewear, footwear, jewellery, lingerie, toys, watches and more.



PHI COMMERCE

Phi Commerce is a year-old start-up in the retail payment space. With a vast global experience in retail payment, Phi Commerce brings to the Indian payments landscape a refreshing approach towards identifying problem areas and processing transactions by providing solutions that are innovative, fast, simple and secure.

Solution for the retailers: The PayPhi POD is a product that lets consumers pay electronically using their own devices (mobile, laptop, tablet) for goods and services ordered using cash-on-delivery. Not only does it address cash related issues, it also empowers consumers to pay remotely for goods ordered online. Besides drastically reducing shipment returns, it enables transactions to be settled quickly for even deliveries made in the remotest corner of India. The PayPhi Payment Gateway is a transaction acquiring platform for both e-commerce merchants and brick-and-mortar stores that lets business acquire transactions using a single platform, which provides uniform customer experience across all channels, thereby increasing customer delight and a higher success ratio of transactions.



LITMUS

While primarily a tool to support the CEO, Litmus supports the rest of the organisation by enabling structured conversations in real-time at all points of experience with customers, employees and other stakeholders in the business. Litmus delivers these structured conversations via all manner of channels -- from SMS and email to in-app notifications, website widgets and screens at the point of experience.

The Litmus platform offers a comprehensive set of features for ongoing improvement in the two key areas that impact profitability: Consumer Experience and Employee Engagement. The platform has been designed to initiate and manage context-rich structured conversations which are carefully structured to improve touchpoint experience at every step of the consumer journey.

These measurements are then translated into actionable points across a range of role-based dashboards which enable user-based functions. Litmus can be operational within a week, show measurable business results a fortnight thereafter and transform an organisation within a couple months. Litmus is now the preferred consumer conversation platform of industry leaders in banking, retail, hospitality, airline, durables and a number of other sectors.



OHAI FOR RETAIL

Ohai for Retail offers a low cost, highly effective proximity marketing solution to retailers without the use of hardware beacon devices, and without complex configuration and IT integration cycles. With the Ohai App installed on in-store mobile devices, retailers can within a matter of minutes, start communicating targeted and personalised messages to potential customers around their stores, for increased walk-ins. Messages are sent basis instant match with the customer interests, making them relevant to the customer and not spam. Customers inside the store can interact with the store personnel for increased engagement and sales. Retailers can track walk-ins and the time customers spend in the store to measure store efficiency. They can also auto-save customer profiles (know your customer) and run analytics on the data (know your customer likes and preferences).



CUTTING CHAI TECHNOLOGIES

Cutting Chai Technologies (CCT) is an early-stage wireless solutions company based in Mumbai. CCT's investor and advisory team consists of industry professionals with decades of collective experience with leading companies such as Google, Qualcomm, Future Group, Reliance and Indosat. The company specialises in design, development and deployment of state-of-the-art wireless solutions that bring the promise of instant discovery and communication with people, places and businesses in a physical space.

Solution: CCT has developed proprietary technology that wirelessly connects mobile devices in proximity with each other in a secure, reliable and seamless manner.

CROMA PIONEERING THE NEW AGE RETAILING!

Croma is a chain of multi -brand retail stores run by-Infiniti Retail Limited a 100 percent subsidiary of Tata Sons. It enjoys a nationwide presence of 96 stores across 19 major cities across the country. This feature highlights the brand's journey so far.

By **Shipra Srivastava**



Owing to continuous inflow of disposable income and the advancement of technology, CDIT has emerged out to be one of the fastest growing retail markets in India. A report by Deloitte titled 'India matters: Winning in growth markets' highlights that India is likely to emerge as the world's largest middle class consumer market with an aggregated consumer spend of nearly US\$ 13 trillion (₹13 lakh crores) by 2030.

In this fast changing world of technology staying relevant is the formidable task. Infiniti Retail, a retail arm of multinational conglomerate Tata operates CDIT retail chain 'Croma'. It is the nation's first large format specialist retail chain for consumer electronics and durables with successful expansion into Croma Zip stores, Croma Kiosks and latest online vertical, www.croma.com. The retail chain was launched with a strong intent to help consumers in their buying process, as is aptly expressed in the brand tagline - "we help you buy". The promise is delivered through knowledgeable and helpful staff, a wide range of brands and products, post-sale service assurance and an international shopping experience.

Journey of the Brand

Croma entered the modern CDIT retail market with sourcing and backend tie-up with Australian retailer Woolworths. Subsequently, Croma bought the India wholesale arm of Woolworths. This partnership gave Croma a strong footing in sourcing, offering a wide variety of products and price advantage vis-à-vis others, and also helped them in private label development. The company launched its first store in October 2006 at Mumbai. Spreading across 20,000 sq.ft the maiden store displayed more than 6000 products.

Presently, the brand has 96 stores across the India, among these 8 are zip stores. And, the brand holds a strong market share. Speaking on same, Ritesh Ghosal, CMO, Infiniti Retail says, " Depending on the category modern retail stands somewhere between 10-20 percent. Another 10 percent would be for e-commerce Croma would share the 1/5 of the organised market. Although, there are many important markets where Croma is not present as of now."

Currently, Croma retails over 6000 products in four lead categories namely, mobile phones, laptops, home and entertainment (including television and sound) and home appliances. Over 200 world class brands offering more than 3000 gadgets



ENERGISING THE NEIGHBOURHOOD RETAIL EXPERIENCE

Off to a promising start, Orion East Mall is redefining the neighbourhood shopping center format by leveraging its strategic location in east Bengaluru. Its thoughtfully curated assortment of brands, provide patrons with a 'just right' environment for shopping, leisure and entertainment. Orion East Mall hosts some of the most prestigious international and national brands like Shoppers Stop, Westside, Cinepolis, Marks & Spencer, Jack & Jones, Skechers, Adidas, Puma and many more. The mall is underlined by the signature Orion Mall experience in its conception and smart usage of space.

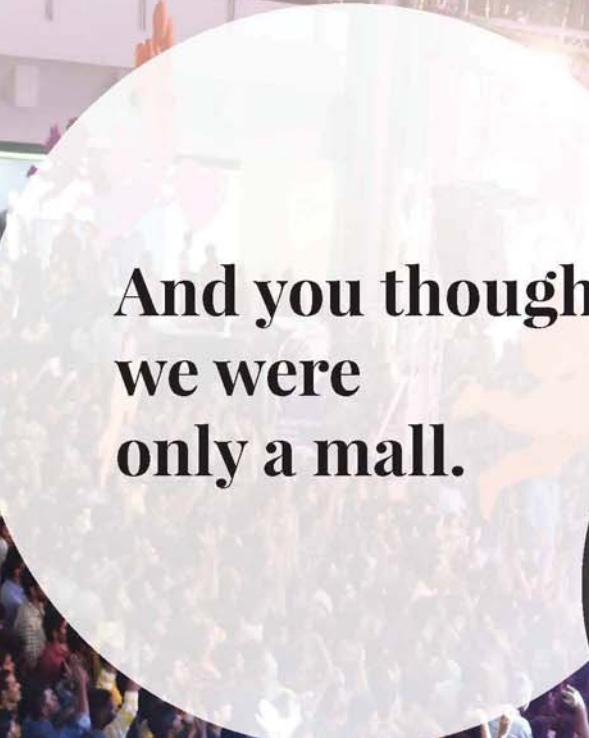
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Awards - 2016

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Franchise India Holding
Awards - 2016

Retail Property of the
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