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IMAGES Retail™

Future of Businesses

MAY 2019

VOL. 18 NO. 5 • ₹100

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NEW RETAIL:

Using Data Technology for
Seamless Engagement Between
the Online & Offline Worlds

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As technology and consumers evolve, the retail sector is racing against time to keep pace. The industry, today, is all about innovations – innovating in a way that consumers convert into loyalists. Retail and technology go hand in hand, retail dependent on technology so completely that success without it in the field is a tough target to achieve. And the key to all innovation leading to great consumer experience – personalisation. Personalisation refers to customising the experience of buying to the very last detail for the benefit of the shoppers, keeping every demand and requirement in mind, serving them exactly what they want, in the colours, sizes and portions they require. As the boundary between offline and online commerce disappears as retailers focus on fulfilling the personalised needs of each customer, a fresh version of retail is taking place, a retail which is far beyond the scope of Omnichannel and Phygital. It is 'New Retail' and this is the concept the May edition of IMAGES Retail explores in its lead story. 'New Retail' is a concept coined by retailer extraordinaire, Jack Ma, Alibaba's Founder. The concept works on the theory that no two physical consumers are the same and that the physical world will become a real-time manifestation of users' implicit as well as explicit commercial desires – in simpler terms, the supreme integration of offline and online commerce leading to extraordinary consumer experiences. Ma says, New Retail will transform the industry beyond imagination.

The issue talks about how New Retail works, with case studies and how the Indian market can adapt it in its context. The edition also brings an exclusive feature on the foodservice industry, which is fast changing and getting more and more competitive by the day. The feature highlights expert opinions and views from both technical and investment angles. Finally, the edition continues to bring readers a round-up of India Fashion Forum 2019, which was held on March 27 and 28 in Mumbai. Check out some notable insights and analyses from the thinkers and futurists of the Indian Fashion Retail industry who attended it in large numbers.

As always, we hope you find this issue informed and beneficial.



Amitabh Taneja

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Modest Print Pack (P) Ltd. C-52, D.D.A. Shed Okhla Industrial Area Phase -1, New Delhi - 110 020 and published by S P Taneja from S - 21 Okhla Industrial Area Phase - 2, New Delhi 110 020 Editor: Amitabh Taneja

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Building a Playbook for the Customer of the Future

In a Customer Experience session held at India Fashion Forum 2019 in Mumbai, leaders across the fashion retail industry deliberated re-designing individual 'business systems' to better understand and serve the needs of the new customer...

By IMAGES Retail Bureau

The emergence of new channels and technology has resulted in debates on the future of stores and many retailers are stuck on a FOMO treadmill, focusing on their own microcosm, albeit without a clear understanding of the end goal — the customer of the future.

In a Customer Experience session held at **India Fashion Forum 2019** in Mumbai, leaders across the fashion retail industry deliberated re-designing individual 'business systems' to better understand and serve the needs of the new customer. The symposium also addressed novel ways of channel optimisation within businesses and on developing a framework to build a playbook to serve the customer of the future. The session was powered by Omuni, India's largest Omnichannel Retail enablement platform.

Moderated by **Mukul Bafana**, CEO, Arvind Internet, the panel consisted of the following dignitaries from the Indian Fashion Retail Industry:



Omuni: Powered by Arvind Internet

- > India's largest Omnichannel Retail enabled platform built by retail practitioners
- > **Brand Presence:** 3500+ stores, 45+ brands
- > **Omuni.site:** Omnichannel enabled brand websites
- > **Omuni mobi:** Omnichannel enabled brand mobile apps
- > **Omuni one:** One interface for all stores
- > **Omuni space:** Omnichannel enabled digital selling spaces for your brand
- > **Omuni biz:** Supporting business services to enable Omnichannel journeys
- > **Omuni.xvz:** Omnichannel marketplace listing, order management and fulfillment
- > **Omuni.ai:** Artificial intelligence driven advanced Omnichannel analytics.



NEW RETAIL:

USING DATA TECHNOLOGY FOR SEAMLESS ENGAGEMENT BETWEEN THE ONLINE & OFFLINE WORLDS

The journey of retail transformation has hit its most exciting phase with the advent of New Retail. Born and bred in China and the brainchild of Jack Ma, New Retail is a concept that retailers across the globe can imbibe and implement for a complete transformation with very little effort. IMAGES Retail takes a look...

By Zainab S Kazi

Shilpa Ahuja is always pressed for time. There's work and then there's home! And when she's home, she wishes she had some help sourcing fresh fish and cooking it for dinner. But then, no supermarket in Bengaluru, the city she lives in, offers her convenience to source fresh fish, let alone cook it to her specifications, her particular tastes. And this isn't true for just Bengaluru. Across

India, we cannot think of such luxury. So, although Shilpa wishes for a miracle in retail to help satiate her cravings, wishes don't really come true – or do they?

There is a chance that Shilpa's silent prayer and that of scores of other individuals could be answered and her dreams become a reality with the advent of New Retail. It already has in China, so why can't India follow suit?

So, what is the concept of New Retail?

First it is much more than simply about facilitating supermarket shopping and having someone prepare your meal with fresh sea food. For instance, New Retail would really serve a car fanatic well – he could have the convenience of booking a car for test driving without having a salesman pursue him to buy something he isn't really sure of. All a customer needs to do is take a selfie for face recognition, select a car he wishes to test drive and voila! He's all set. He then reaches a car vending machine where



the face recognition software will give him the car he has chosen and allow him to simply test drive it for three days, upon which he will return the car to the vending machine with a decision taken on buying it.

New Retail is a boon for such customers.

Understanding New Retail

A brainchild of Jack Ma, Co-Founder & Executive Chair of the Alibaba Group (China's multinational technology conglomerate), 'New Retail' is all set to transform retail beyond imagination.

Ye Guohui, General Manager of Tmall New Retail Products Business Unit explains, "New Retail is best described as the trend where boundaries between offline and online commerce disappear and focus is purely on improving customer experience and fulfilling personalised needs of each customer. The concept is an intersection between the 'consumer value proposition' and 'merchant value proposition', which becomes intrinsic when online and offline commerce are properly integrated.



The Virtualisation of Retail: Tapping VR, AR for Immersive Brand Experiences

An esteemed panel discussed how brands are applying these technologies to aid them in various aspects of the business including increasing revenues and designing business strategies, helping in consumer communications, streamlining inventories and tailoring offers as well as in shaping product development...

By IMAGES Retail Bureau



A session on 'The Virtualisation of Retail: Tapping the Power of VR, AR and Other Emerging Technologies to Create Immersive Brand Experiences' at the recently concluded India Fashion Forum 2019 in Mumbai, highlighted the potential these technologies hold and how they help in redefining retail.

An esteemed panel discussed how brands are applying these technologies to aid them in various aspects of the business including increasing revenues and designing business

strategies, helping in consumer communications, streamlining inventories and tailoring offers as well as in shaping product development.

The panel, which was moderated by **Parag Dhakan**, Head IT, Tommy Hilfiger and Calvin Klein, consisted of:

- > **Pooran Jaiswal**, Group CTO, TBZ
- > **Mahadevan Iyer**, SVP-Customer Loyalty & Analytics, and Business Transformation, Lifestyle- Landmark Group
- > **Gunish Chander Jain**, MD, Bluekatus
- > **Navin Pandey**, Senior Vice President, KW Group



"With the help of Augmented Reality, now our customers can visit any of our shops as per convenience and can check out all the available designs easily via iPads. They can even see designs which are yet to arrive in store."

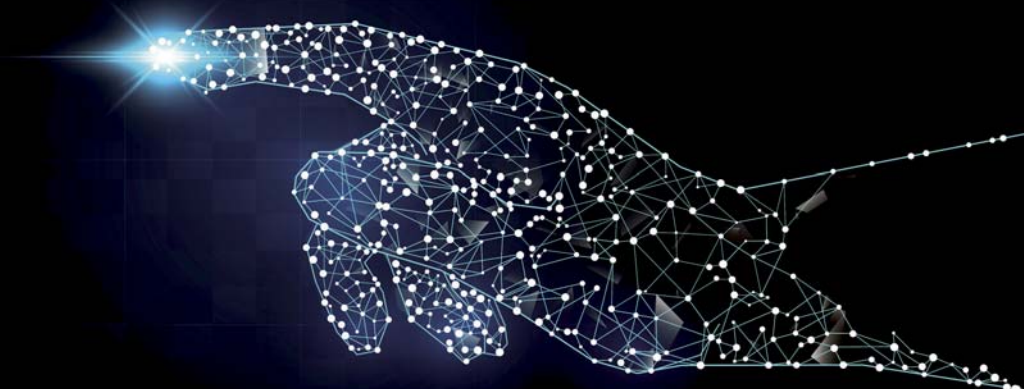
– **POORAN JAISWAL**, GROUP CTO, TBZ



"There are three way in which retailers can go about consumer identification. First is identification, second is understanding the consumer with the use of devices like AR, and finally using technology to help with customer engagement."

– **MAHADEVAN IYER**, SVP - CUSTOMER LOYALTY & ANALYTICS, AND BUSINESS TRANSFORMATION, LIFESTYLE - LANDMARK GROUP

Disruptions and Innovations in Indian Retailing



Technology-supported innovations made even small retailers at least learn the art of connecting with their customers using their smart-phone-enabled social media communication tool such as WhatsApp.

By: Dr. Gibson G Vedamani

The words disruption and innovation are lavishly used in the current business scenario where changes in patterns of consumer behaviour occur fast or where even changes in business context, they have their specific meanings. While 'disruption' means problems or a disturbance that interrupt an event, activity or process—a word that has a negative connotation innovation as we all are aware means something new—an idea or an invention—that brings transformational change to give better results and enhanced success. The term 'disruptive innovation' augurs well with its usage in business, which refers to the dictionary meaning, 'an innovation that creates a new market and value network and eventually disrupts an existing market and value network, displacing established market leading firms, products and alliances'.

'Tsunamic' Disruptions

In the recent times, a few disruptions made a big impact on the retail business in India. I call them 'tsunamic' disruptions. The major one was demonetization resulting in the sudden withdrawal of currency notes of a few denominations overnight in November 2016. Since then, for over six months, the small retailers went out of business. Cash was not available for transactions. They were seen running from pillar to post to find new payment systems so that they did not disappoint customers. A total of 80 percent of Indian's retailers are small with shops measuring less than 50 square feet in size. A majority of them run stores that are less than 50 square feet in size! They were totally dependent on cash transactions. For close to a year, the turmoil of transactions remained a big challenge for retailers to win over. The brighter side of demonetization for the retailers was the fact that they began to install electronic data capture or swipe machines in collaboration with banks and credit card companies. They started accepting Paytm

payment transfers. The small retailers looked up banks, opened their accounts, many for the first time. The first step of organization/modernization of very small retailers began with demonetization. Some of them have realized that they can avail bank funding through cash credits and term loans.

The second major 'tsunamic' disruption that impacted and, perhaps, is still impacting the retail trade is the implementation of Goods and Services TAX (GST) with differential tax slabs on various categories of products. The realignment is yet happening in terms of percentages levied, 0 percent, 5 percent, 12 percent, 18 percent and 28 percent. The various approved agencies of the Government of India facilitated the adoption of the new GST and the filing of returns. The seamless input tax credits were a boon to retailers as the new GST resulted in the avoidance of 'taxation over taxes' or 'cascading-effect' of the incident taxes the system added to the burden of everyone in the supply chain. State and central taxes applicable such as Service



India's Restaurant Business: Tasting Success or Bleeding Money?

With food lovers opening restaurants instead of the professionals, the success rate of the industry has been drastically hit. Since the foodservice industry is fast changing and competitive, it requires a massive amount of knowledge and skill to run the business – just a passion for food is not cutting it anymore...

By Charu Lamba

Investing time and money in any industry without proper knowledge can turn out to be a major error in judgment. This, unfortunately, is something that has become a common phenomenon in the foodservice industry. With food lovers opening restaurants instead of the professionals, the success rate of the industry has been drastically hit. Since the foodservice industry is fast changing and competitive, it requires a massive amount of knowledge and skill to run the business – just passion for food is not cutting it anymore.

“Any service industry can be called a ‘sin’ industry. With increasing competition and more and more people wanting to invest in the business, not all tend to taste success. A restaurant venture isn’t for the faint-hearted, as more than half of new restaurants fail within the first year, and a little more than that close down before they’ve reached five years of business. Understanding any business, before dipping one’s financial toe into the water, is necessary for any industry,” states **Priyank Sukhija**, Owner, CEO and MD, First Fiddle Restaurants.

Success of a restaurant in today’s time lies in its concept along with the consistency.

Junction Mall, Durgapur Offers Quality With Value For Money

The middle-class consumer has been elevated to a higher level, therefore shopping malls are focusing more on Tier II & III cities now, and Junction Mall, Durgapur is an excellent effort to meet these expectations and demands of consumers...

By IMAGES Retail Bureau



With the change in shopping trends in Tier I & II cities, there is a wave of emerging aspirational brands in East India. The middle-class consumer has been elevated to a higher level, therefore shopping malls are focusing more on Tier II & III cities now. The young generation is shopping and demanding both fashion and quality along with value for money. Junction Mall is an excellent effort to meet these expectations and demands of consumers.

In an exclusive interaction with IMAGES Retail, **Arijit Chatterjee, COO, Junction Mall Durgapur**, talks about the expansion plans of the brand in the Tier II & III cities and towns.

From a developer point, how do you choose a location for expansion in Tier II & III cities?

Being a developer, we follow the basic thumb rule of retail which is 'Consideration of Place and People'. From People's point, we conduct research, i.e. socio economy study of prospect customers of the location in three-time frames – present, five years from now and ten years from the present time. Since population count in the immediate catchment is cooperatively less in Tier II & III cities, we consider or take a study on daily population flow to that particular city from other locations, i.e., and daily traffic penetration to that city from neighboring places or event districts. Also, a study on the trend of their lifestyle, expense pattern, aspiration to upgrade etc. is other several factors of consideration. From place point of view, we give the first importance to the look to

the accessibility of the property. Preferred location is such where people from the city can come easily and also its easily accessible for the people coming from surrounding cities/locations.

How different is the retail catchment in these cities in comparison to Tier I and Metro cities?

catchment i.e., the city where the shopping establishment belongs to, but there is a strong influence of customers coming from surrounding towns up to 150kms-200kms depending on the transport system the city has. Taking the example of Junction Mall, apart from the population of Durgapur which is six lakhs, we experience customers coming



In Tier I or Metro cities, the retail catchment is majorly consisting of the immediate catchment with a high density of population. Mostly the shopping behavior is the same for maximum pie. But, in Tier II or III cities, the catchment is very spread out. Although a major portion of the customers are definitely from immediate

from Bardhaman, Asansol, Dhanbad, Bokaro, Bankura, Siuri, Bolpur etc. which belong to our surrounding districts, or even neighboring states.

Do you have separate marketing strategies for different cities?

We have to follow different marketing strategy for different cities that we



The Omnichannel Battleground:

Empowered Associates are Key Differentiators for Brick- and-Mortar Stores

While retail stores are co-managed by a combination of store associates, AI robots, intelligent systems and self-service technology, it is essential to note that humans have to be in control for all these technologies to work in tandem. The crux of it all, therefore, is in how retailers train and engage digitally native associates to work together with in-store technology...

By Sivakumar Thiyagarajan, Managing Consultant and Somraj Choudhary, Consulting Partner– Retail, Wipro Limited

Retail associates have long been seen as a cost lever that need to be optimised and automated. However, the explosion of channels and a changing customer landscape is forcing brick-and-mortar retailers to look at every lever differently and treat their physical assets (including associates) as a key to providing better service and diving efficiencies.

Some years ago, a large retailer such as Nordstrom could pride itself on being

How Cinépolis is Revamping India's Family Entertainment Experience

The brand has recently launched 10-screen megaplex in Forum Shantiniketan, Bengaluru. It is the third in India after Pune and Thane. The megaplex has also launched first Cinépolis Junior in India...

By Charu Lamba



Cinépolis, India's first international and the world's second largest movie theatre circuit by attendance, has always been recognised as a technologically driven cinema exhibitor with innovation at the forefront.

Standing true to its commitment, the brand has recently launched 10-screen megaplex in Forum Shantiniketan, Bengaluru. It is the third in India after Pune and Thane. The megaplex has also launched the first Cinépolis Junior in India.

"In sync with changing customer needs, Cinépolis continually innovates with new and interesting entertainment formats. The new formats offer families an innovative and fun way to connect at one-of-a-kind spaces which are designed keeping children in mind," says **Javier Sotomayor, Managing Director, Cinépolis Asia.**

"Cinépolis has redefined the movie-going experience by introducing many industry firsts in India such as the concept of Megaplex in November 2013, the 4DX format in 2014 and the first wireless VR gaming zone (Pune) to name a few. With focus on ensuring usage of globally disruptive technologies, we boast of the finest technologies like IMAX, RealD 3D and Dolby Atmos," he adds.

In its first decade of operations in India, it has established its position as the third largest cinema exhibitor.

Who's Who

Javier Sotomayor has been with Cinépolis for 15 years and has worked in Mexico, Central America and India. He was part of the initial team of Cinépolis India and has been part of the Board of Directors since its inception in 2007.

He was in charge of the first international expansion of the company to Central America in 2002 and has occupied various positions at a global level like Marketing, Supply Chain and Business Development. He created and led Cinépolis low-budget cinema concept in Mexico, which accounts for more than 300 screens, so far. He has over 20 years of experience in start-ups, marketing, business development and strategic planning in the industries of retail, entertainment and financial services. He is an Industrial and Systems Engineer from Tec de Monterrey, with an MBA from "IPADE Business School.



"We believe that a higher number of screens in a multiplex are more beneficial for the consumers as they can go watch a movie at any given time. It also gives the exhibitors like us the opportunity to showcase different and niche content."

– JAVIER SOTOMAYOR
Managing Director, Cinépolis Asia

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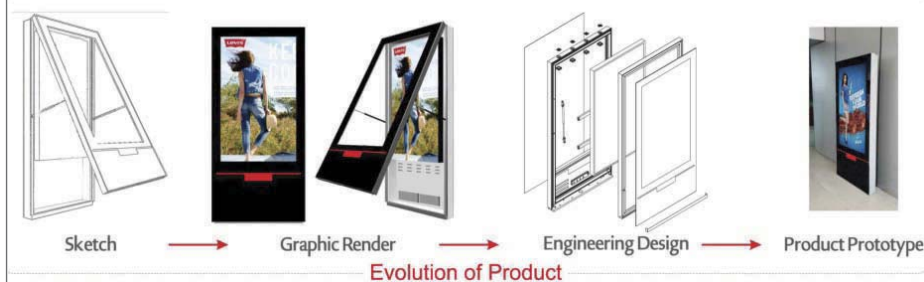
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