Branding the Last Mile – A Perspective from India

Ogilvy Discovery Insight Initiative

Summary

With 40% of brand choices being made at the Last Mile of purchase and as much as 60% of the marketing budgets being deployed for Retail & Trade promotions – Last Mile Communication is where the action is!
Be it a supermarket aisle, a car showroom or a financial advisor's office Last Mile is the place *where brand selection can be activated.*

By using a combination of qualitative & quantitative research techniques, across key markets in India, Branding the Last Mile study has been able to bust many of the prevailing ***Retail Myths*** and propose ***New Roles*** for the ***Last Mile Brand Communication***. In many ways the learnings from this study helped in documenting a large part of the undocumented retail wisdom that has existed. By looking at multiple retail formats we also realized that there is a lot that all of them learn from each other.

This study was one of the **most appreciated** works presented at the **WPP Retail Forum, 2006**.

The study also earned critical appreciation from Hindustan Lever Ltd. (Unilever's Indian subsidiary) and an Ogilvy & Mather Client.

Introduction

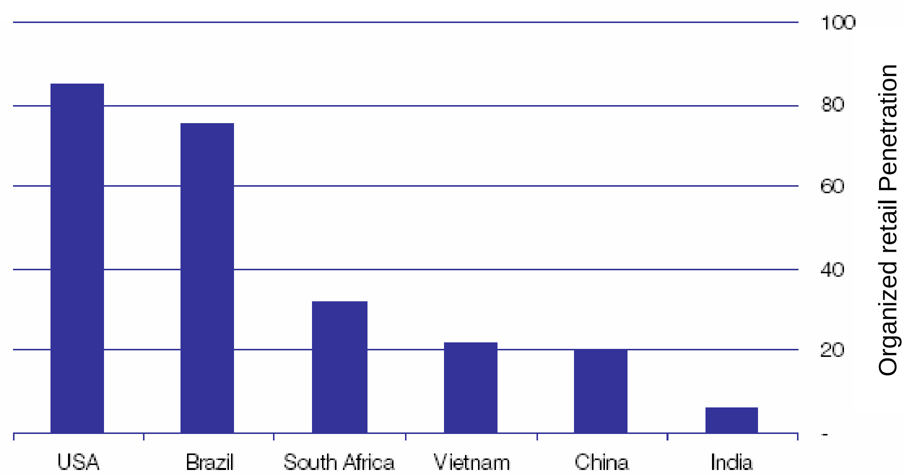
India represents a fragmented & unstructured retail landscape with the majority of it being in the unorganized sector. As per 1999-2003 Euromonitor from Central Statistical Organization there were more than 12 million retail outlets in India in 2003. Out of these about 78% were in unorganized sector - small family businesses utilizing only household labour (Table 1).

(Table 1.)

Outlets (in '000s)	**1999**	**2000**	**2001**	**2002**	**2003**
Specialists					
Food, beverages, tobacco & intoxicants	5,810	5,839	5,869	5,898	5,927
Clothing	764	793	824	856	889
Footwear	135	142	149	156	164
Glassware, tableware & utensils	182	190	197	205	213
Furniture	37	41	46	51	56
Electrics / electronic equipment	211	232	255	261	310
Books, magazines & stationery	164	172	180	188	197
Pharmaceuticals and medical goods	255	283	314	349	388
Supermarkets	0	0	0	1	1
Others	3,522	3,693	3,730	3,921	4,000
Total	11,081	11,385	11,564	11,905	12,144

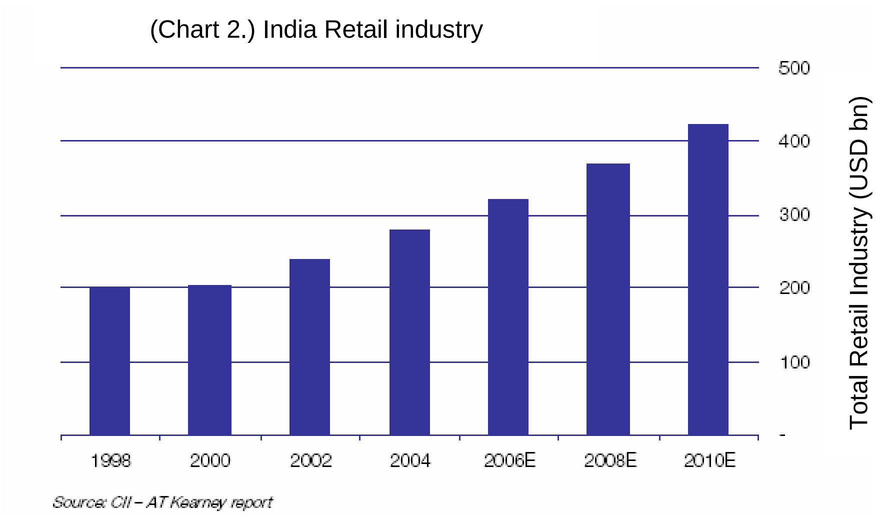
(Table 1 contd. *Source: CRIS INFAC*)

(Chart 1.) Penetration of Organized retail



(Source: AT Kearney)

Today organized retail has a minuscule 3% (Chart 1) share of the entire retail pie, but this is bound to change. With liberalization of economic policies, many large players both Indian and international are stepping into Indian retail market with the hope of getting a share of this exploding pie.



Organized retail poised to grow at 35% CAGR over 2006-10 (Estimated)

(Source: AT Kearney)

Collectively over 600 malls are expected to come up by 2010 adding more than 100 million square feet of retail space. It is expected that organized retail would grow to as much as 10% of the total retail market by 2010 (Chart 2).

The proliferation of organized retailing in India not just makes it a top ranker in the Global Retail Development Index but also a preferred destination for investment ref. Table 2.

(Table 2.)

Country	**Country Risk 25%**	**Market Attractiveness 25%**	**Market Saturation 30%**	**Time Pressure 20%**	**GRDI Score**	**Rank**
India	55	34	89	76	100	1
Russia	43	59	53	90	85	2
China	58	40	57	86	82	5
Turkey	46	59	64	40	66	10
Thailand	57	39	49	72	64	12
Malaysia	66	49	54	38	62	14
Egypt	45	35	81	35	60	20
Brazil	46	56	64	16	49	27
Colombia	39	42	65	37	47	29

(Source: AT Kearney)

Apart from the rapidly evolving retail landscape, there also is the New Shopper that we were intrigued by. A shopper whose 40% of brand choices are being made at the Last Mile of purchase this in turn is leading to as much as 60% of the marketing budget of leading companies being deployed towards the Last Mile Retail environment.

Proliferation of organized retail, increasing investment in retail sector and limited knowledge about the new shopper were the three factors that triggered the need for a study to understand this evolving retail landscape.
This study tries to understand the different types of retail formats and explores if there are corresponding shopper types. Basis this knowledge the study attempts at busting some of the prevailing retail myths and tries to arrive at new roles for last mile brand communication

Definition & Framework

Last mile is a place *where brand selection can be activated.* It could be a supermarket aisle, a car showroom or a financial advisor's office. The last mile analysis is concerned with *choice & selection* and *not just sales*.
The objective of the study is to develop a communication mechanism wherein a particular brand can be selected over competitors.

Also, it is important to note that there cannot be one general framework for all kinds of shopping viz. purchasing a car, holiday shopping over net, buying a mutual fund product, purchasing a music CD at a store or buying a breakfast cereal. In order to develop a more specific model, the study looks at the last mile purchase dynamics in *Fast Moving Consumer Goods (FMCG) and Consumer Durables.*

Methodology

The study uses a combination of qualitative & quantitative research. The qualitative module includes in-store observation, accompanied shopping trips, retailer and shopper interviews & in-store visual communication audit - in all about 150 exclusive consumer interactions and about 50 retailer interviews.
The quantitative module of the research is based on 400 exit interviews with shoppers. These interviews helped in checking many of the hypotheses that we generated during the qualitative phase of the research

Scope

The study covered over 600 individual consumers and profiled over 120 retail outlets of different kinds. It was carried out over a period of three months (Nov-Dec 2005) across cities viz. Delhi, Kolkata, Mumbai, Bangalore & Hyderabad.
Ogilvy's Discovery group tracked the Qualitative Module of the study whilst an independent research agency was hired to run the Quantitative part of the study.

Discovery

The first key learning from the study indicated that ***Shopper Types correlate with certain Store Types.*** This is true both for both FMCG & Consumer Durables.
It is important to note that though the shopper types visit the corresponding store types, their preferred store type is only indicative of the store primarily visited by them and does not mean that it is the only store type that they visit. All the shopper types have a set of stores, from where they usually buy, we call it the ***Store Set***. Most of their regular purchases happen at the preferred store type and the secondary store type is used only for top ups and emergencies.

The Stores & the corresponding shopper types exhibit different last mile behaviours. We call these ***Last Mile Mindset Constructs.*** These mindset constructs give out a lot about the store –shopper interface. We have tried to condense the key last mile retailer and shopper behaviour, at the end of the description of each store and shopper type. The mindset constructs also give out the ***meaning of convenience*** as it changes across the shoppers & store types.
The store type and corresponding shopper descriptions have been classified under the two distinct categories viz. FMCG & Durable.

Fast Moving Consumer Goods (FMCG)

Kind of Stores & Corresponding Shopper Types:

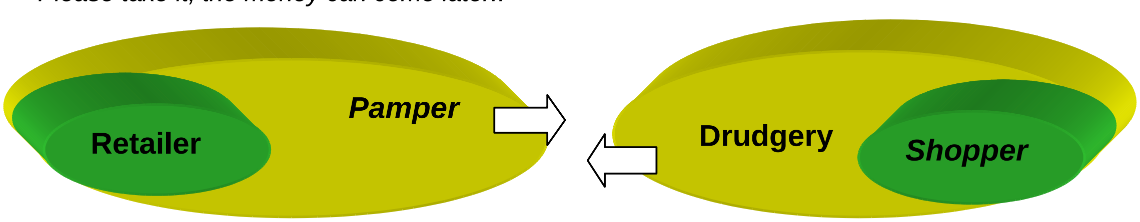
1.Neighbourhood Grocer: Small grocery stores (about 100 to 200 sq ft) located conveniently in close proximity to house. Owned by proprietors and most of time employ members of the family. Stocks the daily grocery needs but offers limited variety and poor display opportunity.

Grudging Homemaker: Neighbourhood Grocer is the preferred shopping destination for the Grudging Homemaker. She is usually a migrant from a small town, and is not working. Her husband is pressured on time and thus most of the family purchases have been delegated to her. She does not enjoy the grocery purchase process and would ideally prefer to shop for clothes and accessories. She tries to avoid the drudgery of grocery purchase by ordering over the phone or sending the child to the store. The retailer usually knows her and her family. He tries to pamper her & make her purchase interactions stress free and personal.

Neighbourhood Grocer & Grudging Homemaker Mindset Construct

“Here kid, here’s a candy for you!”

“Please take it, the money can come later..”



“Please send someone with xyz.. We have guests over..!”

Interaction with person more than product

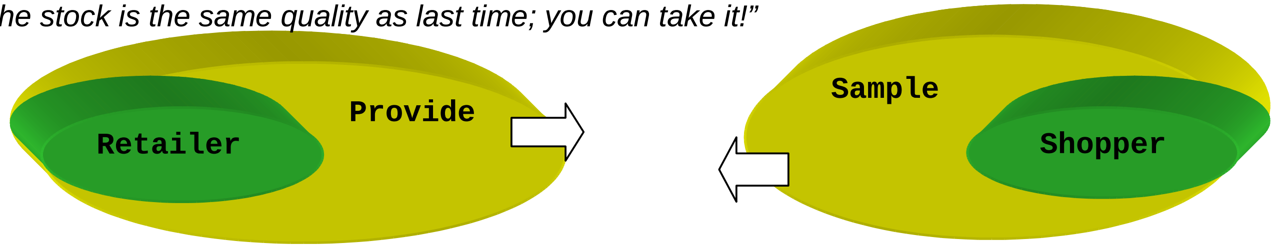
Credit & Proximity is convenience;
Relationship is convenience

2. Wholesaler: Is usually concentrated around the wholesale market of the city/town. Keep select or fewer products of daily needs, but have wide variety within staples viz. 8-12 varieties of Rice or *dal,* 7 kinds of wheat, different grades of sugar or cooking oil etc. These stores also offer good prices to the shopper. Apart from product variety these stores also offer expert knowledge about various products that they are selling. The stores are midsized and could range from 500sq ft to about 1500 sq ft. Like the neighbourhood grocer there is limited display opportunity here as well.

Mrs. Speciality Shopping: She frequents wholesale stores. They consider themselves as experts who know how to identify a good variety of unbranded merchandise viz. Rice, Spice etc. They sample the product by touching, smellng and evaluating it on quality. These shoppers usually divide their monthly purchases between branded and non-branded products (read toiletries and food). Most of the food ingredients are bought from shops in the wholesale market. They usually stock food articles in large quantities. For example they might buy grains for the whole year in a single trip or pick up spices for six months.

Mrs. Specialty Shopping & Wholesale Store Mindset Construct

"The stock is the same quality as last time; you can take it!"



"How is the rice this time?"

Interaction with the product, and the person

Product Quality is convenience;
Touch-feel is convenience

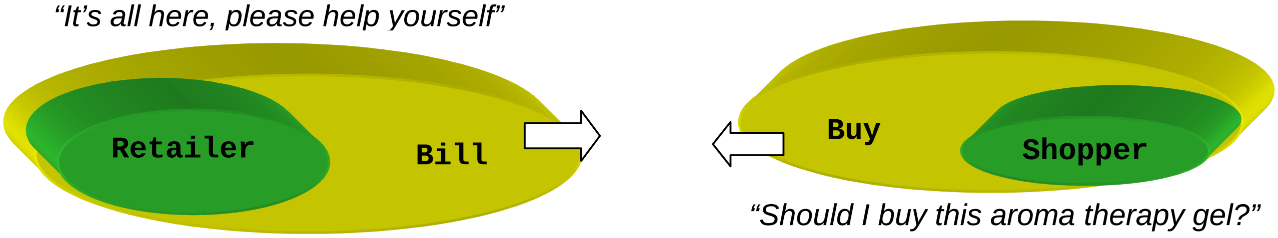
3. Organized Neighbourhood Grocer: These are the ‘new age’ neighbourhood grocers. They are learning fast from the large format supermarkets and departmental stores. As a result they have refurbished their stores into self-help outlets. They are relatively bigger than the neighbourhood grocer and could be spread over 300 sq ft to 1000 sq ft of space. They have a wider variety of the daily grocery needs and also better display. In addition to being self-help they also take orders over the phone and deliver at the doorstep. In many ways they are trying to marry the best that the neighbourhood store has to offer with the advantages of large format supermarkets.

Smart Shopper is the shopper variety that frequents Organized Neighbourhood Grocer the most. The defining contrast between the Smart Shopper and Grudging Homemaker is that the former enjoys the grocery shopping and is looking for more variety in the day-to-day grocery articles. She is experimentative and wants to feel that by going to a neighbourhood store she is not missing out on the new products in the market. She is the one who visits Malls and Super markets for browsing and checking out what is new and latest. Primary reason for her to be buying from the organized neighbourhood grocer is the convenient location and assurance of reasonably good variety. The Smart Shopper is image conscious. This drives her to buy premium variety of certain products for guest’s viz. rice, soaps and even tealeaves. She picks up regular brands for own day-to-day family consumption.

The Smart Shopper faces one challenge in this kind of stores, which is personal attention or salesperson’s extra knowledge about some of the ‘newer’ products in the market; for example, Aroma Therapy Hand or Body Wash or Olive oil etc. As a shopper she is not very sure of how she can use some of these products, but this does not necessarily mean that she does not want to buy these products.

Mrs. Smart Shopper & Neighborhood Organized Grocer Mindset Construct

"It's all here, please help yourself"



"Should I buy this aroma therapy gel?"

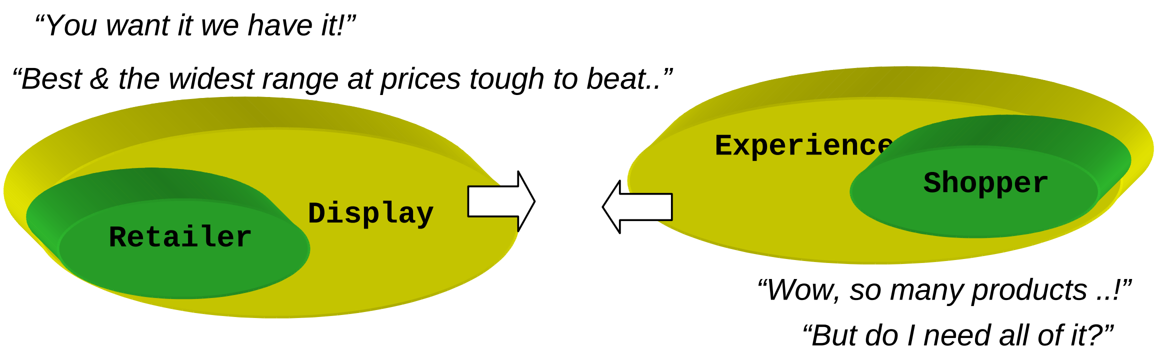
Interaction with product/display not person

Location & Variety is Convenience; Novelty is convenience

4. Malls & Supermarkets: These are the flag bearers of the retail revolution in India. They could be spread over anywhere from 10,000 to 50,000 sq ft of space. Product placement is based on use of scientific techniques like planogram etc. They have the widest variety of merchandise and are based on the self-help model. Unlike in the west where a lot of these big box malls are developed away from the city, in India most of them are coming up in the heart of the city. Many of these large format stores offer special/exclusive promotions on leading national brands. These stores use new ways of enhancing the purchase experience viz. heightening sensory experience using aroma of a freshly prepared biscuits or freshly ground coffee. These large format stores also offer innovative ways to sample the new products.

Mall Madame is the active shopper at these new supermarkets. She is a variety seeker and for her buying in the comfort of air conditioned environment, from a well laid out store is an experience in itself. She seldom visits these stores alone and is usually accompanied by friend(s) or husband and kids. Mall Madame browses actively and more often than not ends up spending more than what is planned for. This is partially due to better deals on larger volume purchases and partly due to impulse purchases. Also, when kids accompany her they end up doing a lot of running around in the store. Kids also remember TV commercials the most and end up reminding their moms about things that are to be bought. Also, direct access to a wide variety of well-displayed products plays the role of a silent reminder to many products that are needed but were not a part of the original shopping list.

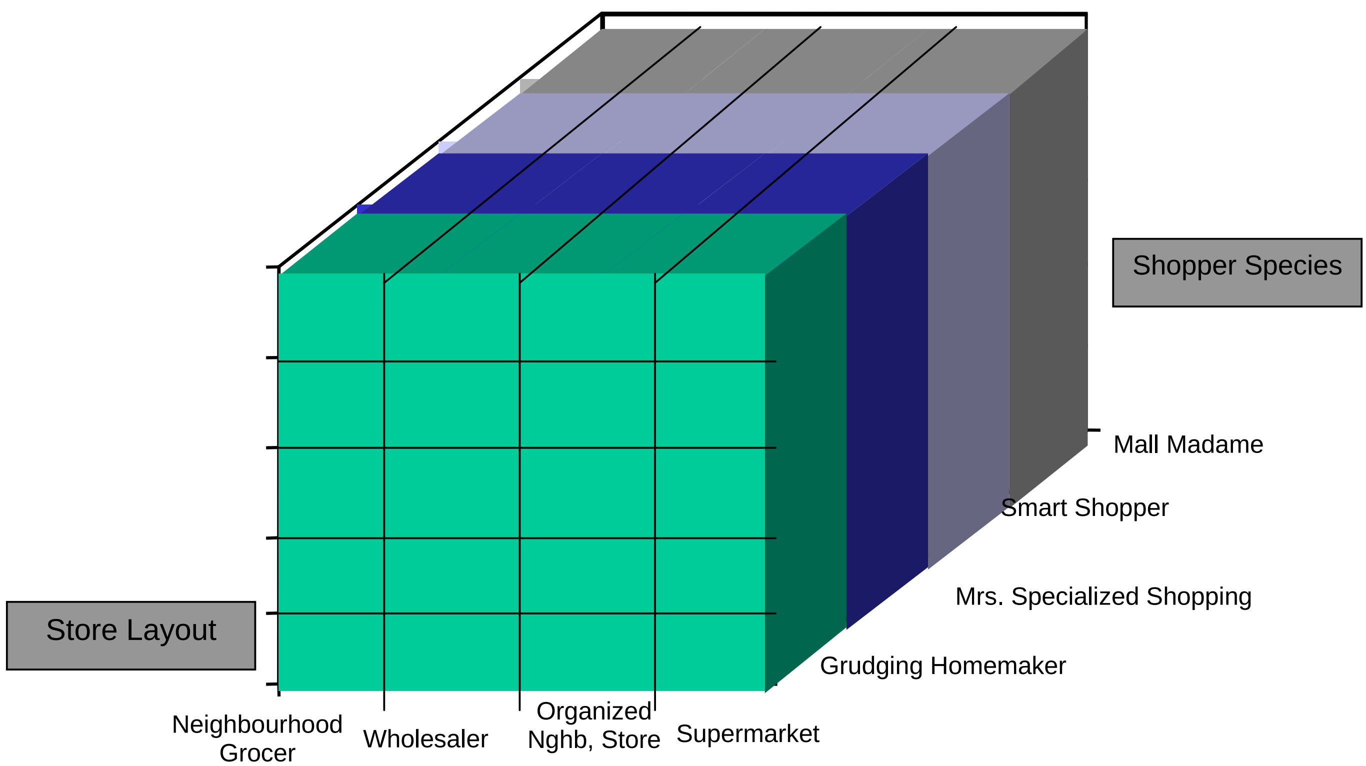
Mail Madame & Supermarkets/Modern Trade Current Mindset Construct



Interaction with product & range, not person

Range/Variety is Convenience; Parking is Convenience; Air Conditioner is Convenience

Last Mile Convergence Matrix – FMCG



Consumer Durables

Kind of Stores & Corresponding Shopper Types:

It may please be noted that while there are broadly three kinds of durable stores, their way of operation is not disjoint. On one end many of the small neighbourhood durable stores are learning from the way the large stores display products and train their staff by imparting product knowledge, on the other hand many large format multi brand stores are also learning the importance of 'personal touch' in shopper interactions from the smaller neighbourhood durable stores.

Neighbourhood Durable Store: These are small durable stores spread over an area of 400 sq ft to 800sqft. These stores offer limited range of durable products & within these durables they have limited set of brands to offer. Most of the time these stores draw their consumer equity from one or two brands that they are selling. This equity is a result of higher turnover of the said brand due to the better margins for themselves or other marketer initiatives like setting up a glow signboard or helping them with some localized or in shop display.

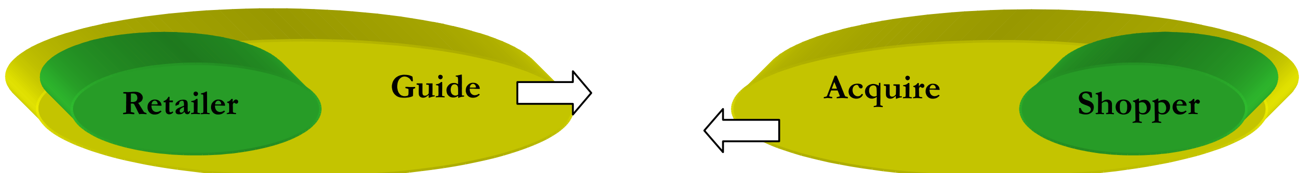
The typical sales pitch in these stores starts with a preliminary question to the shopper "What is your budget". Thus the small durable retailers do not try and understand the shopper as much from the perspective that "what is his need" as they from "how much is he ready to spend". These neighbourhood durable stores use references from and relationships with the families in their vicinity to sell. Most of the time they know the locality very well and often quote common friends and acquaintances to the shopper in order to make him feel comfortable. A large part of the sales assurance is hinging on personal guarantee & trust. In fact one of the differences between these and large format stores is the ***significance of Personal Guarantee over a Warranty Card.*** Many of these stores even un-sell the large format stores by pointing out their impersonal character. These stores are stronger in conventional durables (TV, Refrigerator etc.) and appliances (Toaster, Juicer Mixer Grinder etc.) and not as much in new technology products (Plasma TVs, Front loading washing machines, Personal computers etc.) thus their stocking pattern is skewed more towards conventional products.

Solution Seeker: This durable shopper is usually a first time buyer into the category viz. first colour Television or first refrigerator etc. The purchase context is linked with the stage in the family lifecycle viz. Childbirth, marriage etc. The solution seeker requires category reassurance & category education. It is this lack of information that makes the retailer very influential in impacting a solution seeker's purchase decision. Many a times the retailer is introduced to the shopper by some of their relatives or friends who already own the product. For the solution seeker the retailer's presence in the vicinity of the residence is a matter of convenience and peace of mind because if anything goes wrong the store and the people are close by. This comfort with proximity is evident even when the product being purchased is high value or of a kind that would commonly be perceived to be bought from a store that offers a wide variety.

The solution seeker usually does not visit multiple stores before actually buying the product. He perceives the bigger stores to be expensive & impersonal. For him retailer is as important a brand as is the brand of durable that he is buying.

Neighbourhood Durable Store- Solution Seeker Mindset Construct

"I am the warranty card"



"We'll buy from XYZ store, the owner is know to my Uncle"
"If you have any problem you do not have to go to the company; we are here for you"

Interaction with the person and price; with the product at solution-provider level

Store Familiarity &Product Functionality is Convenience

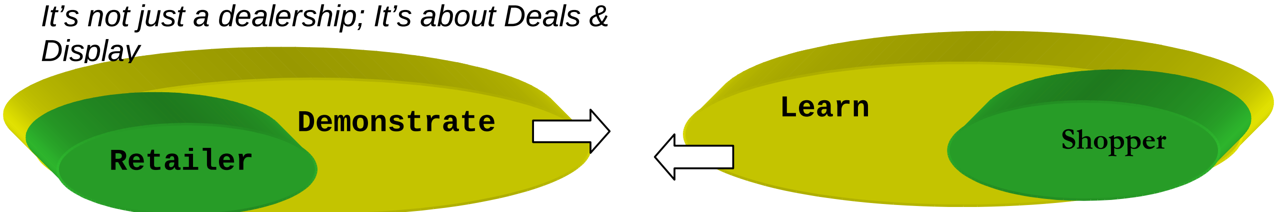
Large format multi-brand store: These stores are spread over large area that could be anywhere from 5000sq ft. to more than 10,000sq ft. The stores are well stocked with an array of durable categories and there is almost no durable product that one can't get here. Products are laid out section wise with clearly demarcated product groups. They have special soundproof zones for listening to home theatres and other audio products. Most of these stores have an ongoing promotion with one of the brands on display. These offers and promotions might not be necessarily available in the smaller stores and sometimes even other large format stores.
The first question that a shoper is asked when in this kind of a store is "what brands are you looking for". The retailer tries to understand the consideration set and then plug in the offer of alternative brands. The store managers and customer staff is well trained and know more about the product that what one would usually expect from a store salesman.

Upgrader: Is the shopper type that buys from large format multi-brand stores the most. Upgrader is not a novice to the category and understands products, features and even prices much better than a Solution Seeker. He has already bought the durable in the past. Now he is planning to replace it with a better/newer model or add one more for another room at home viz. Colour Television, Air Conditioners or moving up from a Direct Cool Refrigerator to a Frost Free machine. The upgrader is always looking for finance deals or discounts. He visits 2-3 outlets before deciding on one. What is important from this shopper's point of view is a good display of key features and benefits that justify the price premium or explain the product vividly.

Large format multi brand store & Upgrader mindset construct

It's not just a dealership; It's about Deals & Display



"Let me see the options before I buy"

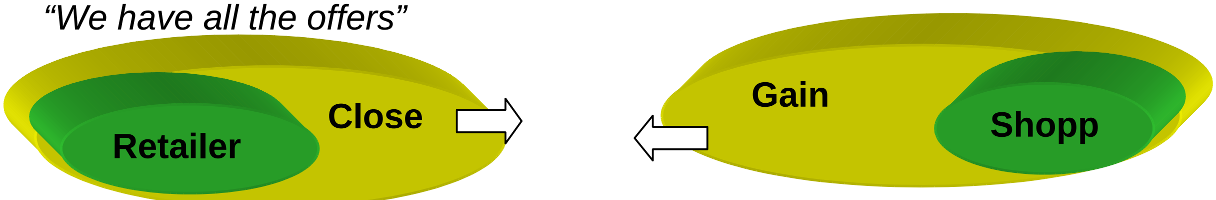
Interaction with Product & Person

Information, Choice & Post-purchase Service is Convenience

Festive Shopper: Is the second variety of durable shoppers who prefer to buy from large format multi-brand stores. Postponing the durable purchase in anticipation of possible deals and discounts around festivals is the defining trait of this shopper. This set of shoppers goes to at least 2-3 stores before finalizing the deal from a particular store.

Large format multi brand store & Festive shopper mindset construct

"We have all the offers"



"This is the season to buy"

"Would get the best deals now"

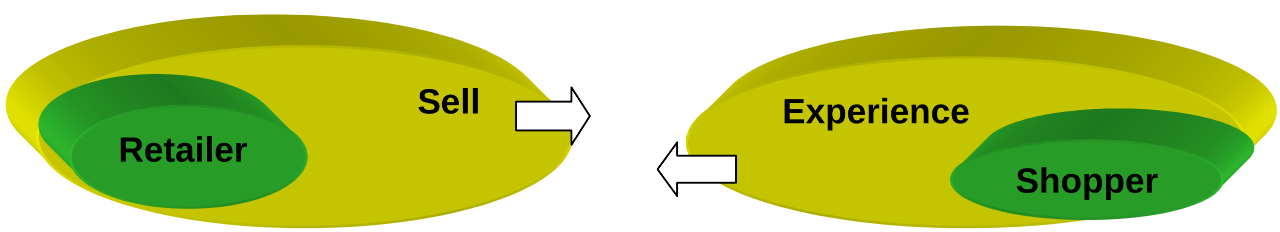
Interaction with Promotion not Product or Person

Finance & Price Deals are Convenience

Brand/Flagship Stores: These stores are usually owned and or operated by the company. They offer one of the best displays and demonstrations in the durable retail category. Almost all the products and variants under every product and category are made available in these stores. Sometimes these stores display new products that are not even launched in the local market yet – these are displayed in order to build technology or innovation linked image associations for the brand. Sales pitch in such a store usually starts with a question about “what is the size of the room where the home theatre needs to be installed” or “how much is you usual viewing distance” for big screen television Purchase These stores command a perception among the consumer’s mind that the products available here are ‘fresh’ (new stocks), original and that the store would offer better service – routed directly from the company.

Experience Hunter: Brand/Flagship store is the preferred shopping environment for the Experience Hunter. This set of durable buyers researches the Internet for products and brands before going to the store. He also has a strong point of view on almost all the brands and new technologies. For example Sony is the best for CRT Televisions, Sharp is the best in LCDs Samsung has value for money home theatres etc. This set of consumers also is the usual expert reference that many of the other customers use while buying technology durables for themselves. Sometimes they even accompany their friends to the shop and guide them in the purchase process. The Experience Hunter is seeking near real product experience in the store. He has high self-image & shopper ego and does not want to be told what is good and what is not. His focus is on a good demonstration of the short listed options. He usually does not like to be influence. More often than not he is better informed about the products & features than the service staff at the store.

“Best cable for this amplifier and that pair of speakers?
Let me check with my senior/manager sir.”

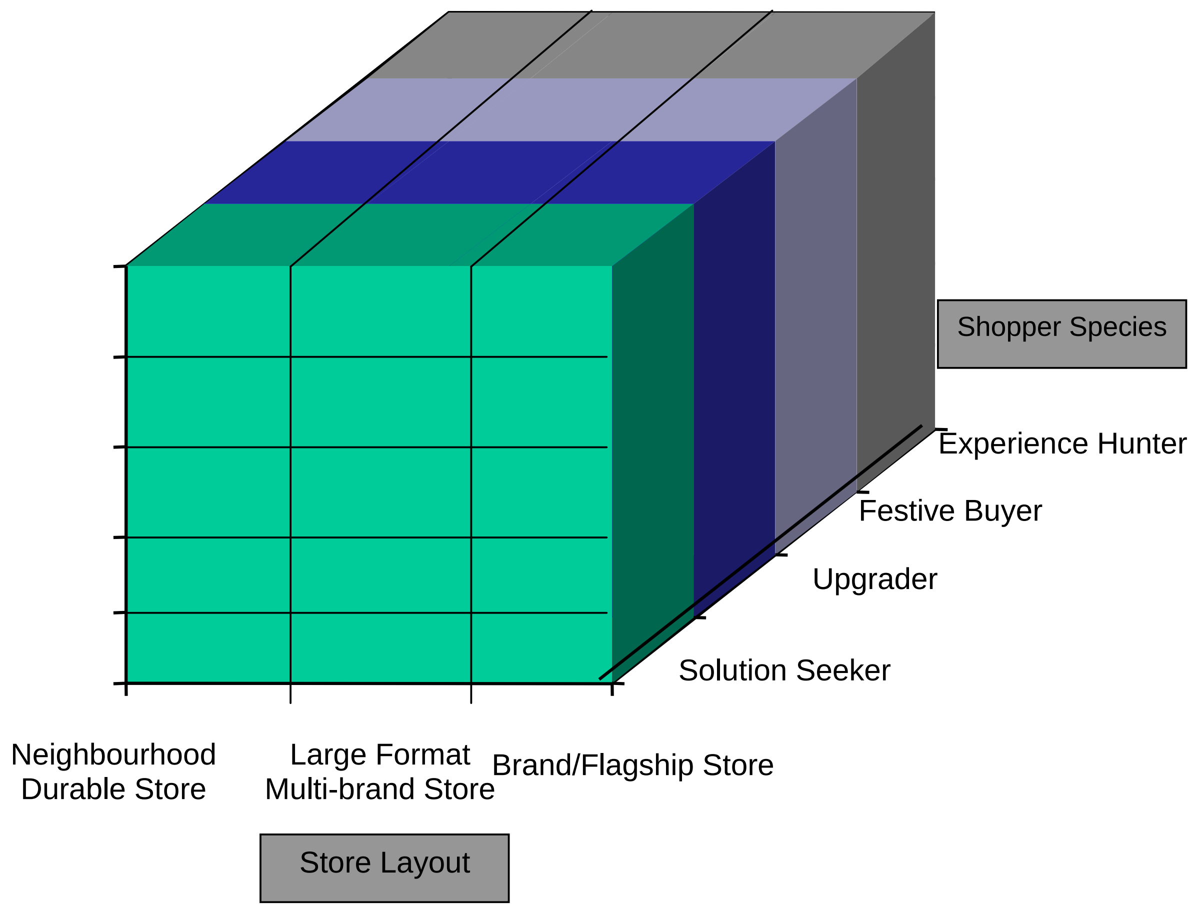


During a Demo: “I think you are using the cable that does not go with these speakers”

Interaction with the product not the person

Fidelity & Experience is Convenience

Last Mile Convergence Matrix – Consumer Durables



These above-mentioned mindset constructs offer a unique window to the way these shoppers think and feel while shopping either for Durables or FMCG products. Further these mindset constructs go on and bust many of the prevailing **Retail Myths**. What follows is an account of some of those Retail Myths.

ONE

Myth: Visibility Sells
If we create visibility, the buyer will be reminded and thus choose our brand over the one which is less visible at the Point of Purchase (POP)

Reality: Last mile communication is as cluttered as the mass media communication. Last Mile communication has a role larger than just being a reminder or news

Imperative: Do not just be visible; be ***relevantly*** visible!

Idea/Implication: Do not just display a Digital Camera in a well-lit & sanitized display unit; do not just put posters of the digital camera as the backdrop to the product.
Instead bring it out of the display; encourage 'product play' by connecting it to television sets, clicking pictures of shoppers or asking them to click their friends and then 'slide show on large screen TV sets with customized messages!

New Role of last mile communication: *Create Spontaneity*

TWO

Myth: Kids distract mothers while shopping
If a child accompanies his mother or a woman shopper; s/he would truncate the duration and value of the shopping trip.

Reality: Kids (esp. between 7-12) help mothers in shopping; they are more likely to remember the TV commercials; the shopping bill goes up when kids accompany mothers.

Imperative: Involve kids in the Last Mile!

Idea/Implication: Hand them the shopping list. It works well in organized retail; allow them to browse independently; design brand experience zone for kids in last mile viz. play incomplete TVCs and ask them to narrate the complete story, reward here. They are more likely to spend time there, remember and play it back to parents.
An 'actively performing' kid is a matter of pride for the parent and boosts their ego.

New Role of last mile communication: *Massage ego*

THREE

Myth: High priced durables make shoppers travel distances.

When a buyer is spending a good amount of money on a consumer durable, s/he would travel a good distance to get a good buy (a good buy is the best price-value-image mix)

Reality: Most of the durable shoppers check stores within their 'locality'. Key concern being *'what if something goes wrong!'*
A known shop in locality is more 'reliable'.
"My neightbour's friend also bought his television from the same shop!"

Idea/Imperative: Retail presence through *service reassurance & purchase reference.*
Service as a window to new sale
Make a virtue out of great service – Installation, Usage Tips & Periodic Service
Trigger purchase through reference - pictures and experiences of people who have bought a microwave in the last 3 months on a display board, in the store.

New Role of last mile communication: ***Reward loyalty***

The following idea goes beyond our original definition of last mile but still opens a new window of opportunity.
Use the on-call service engineer who visits home to create of database for product *Placement*. In every visit the on-call service engineer could do a visual check and make a note of the key durables being used by the household and get an idea about their approximate age. This database could then be used by the marketer or the retailer to help in installing new products for demonstration ('test drive') in select households. For example a household already using a 20'' Flat Panel Television for he past five years is a good candidate for an upgrade to LCD or Plasma Television. Similarly upgrades could be worked out for other products viz. Direct Cool Refrigerators to Frost-Free refrigerators, Small Refrigerators to bigger refrigerators, Oven Toaster Grillers (OTGs) to Microwave Ovens, VCD players to DVD players, Stereo Systems to Home Theatres etc.
Service executive could be the window to inform, educate and upgrade.

New Role of last mile communication: ***Reassure/Ugrade***

FOUR

Myth: In-store consumer durable comparisons are centered on product features
Brands that can pack-in the maximum number of features at a given price sell the most.

Reality: There is more to the purchase motivation than features.
Durables do not just fit into a family, they fit into a family life stage viz. job, marriage, childbirth, new home etc.

Idea/Imperative: Display brands/ products by budget range/life-stage. Buyer can see more and compare better without having to move around to see different options offered by different brands.
New Role of last mile communication: ***Enable Comparison***

Retail needs to move away from the *'LG range', 'Samsung Range' and 'Sony* range' mindset to the *'Single Executive Set', 'Newly wed set'* etc. This could also help brands leverage their portfolio through clubbed financing and gives the shopper a reason to pick up more than one product at a time.
New Role of last mile communication: *Create Spontaneity*

The other way of displaying durables at the last mile could be on the basis the size of the living room or kind of dwelling unit. Retail could start by asking *'what are the dimensions of your room where the TV/Audio system has to be put?'* Instead of *'which model/brand do you want to buy?'* This approach would *turn the durable purchase into a home building exercise* rather than a plain purchase situation.

New Role of last mile communication: *Create Pleasure*

FIVE

Myth: Point of Purchase has a key role to play in adding to the brand personality
'When we have a celebrity endorser for our brand we must put him/her on all the collaterals!'

Reality: At the point of purchase the buyer is in an evaluative mode and a mere reminder of the mass media communication is not enough to propel the prospect towards purchase.
The shopper might like the advertisement for a particular brand of detergent but inside the store the purchase decision might swing in favour of another brand due to an ongoing promotional offer on it.

Idea/Imperative: At the last mile we need to redefine the role of POP by highlighting the functionality of the brand/offer keeping in mind shopper's evaluative mode.
Durable marketers could do this by just filing all those 'table rich' comparative feature ads, that we see in the newspapers, for the retailer to help him convince/reassure the shopper about 'price per feature' equation for different CTV brands.

New Role of last mile communication: *Enable Comparison*

SIX

Myth: The greatest degree of purchase involvement (in groceries) happens at the supermarket.
The shopper has greater choice, greater space and direct interaction with the products and thus s/he can compare brands better.

Reality: The greatest purchase involvement with grocery happens at the wholesale grocery dealer. He not just offers the best rates but also the best variety of products, especially cereals and spices. He offers a wide variety within these two categories of cereals and spices. An engaged shopper can pick up from 9-12 varieties of rice and multiple kinds of the same *dal* different grades of wheat, sugar and even tea. He even offers expert knowledge on the different varieties of food articles on offer.

Idea/Imperative: Supermarkets could increase the pleasure of shopping and mimic the best of the wholesale shopping experience by having open packs (pull the product out of the PET bottle!) – provide opportunity to touch, feel and smell the cereals, tea, spices, grains etc. There also is an opportunity to highlight the source and freshness story of various food articles especially staples - rice/tea from…. sourced when… etc.

New Role of last mile communication: ***Create Pleasure***

SEVEN

Myth: Grocery (FMCG) shopping happens at the beginning of the month
The man gets his salary. He draws money from the bank and asks the lady of the house to manage month's finances.

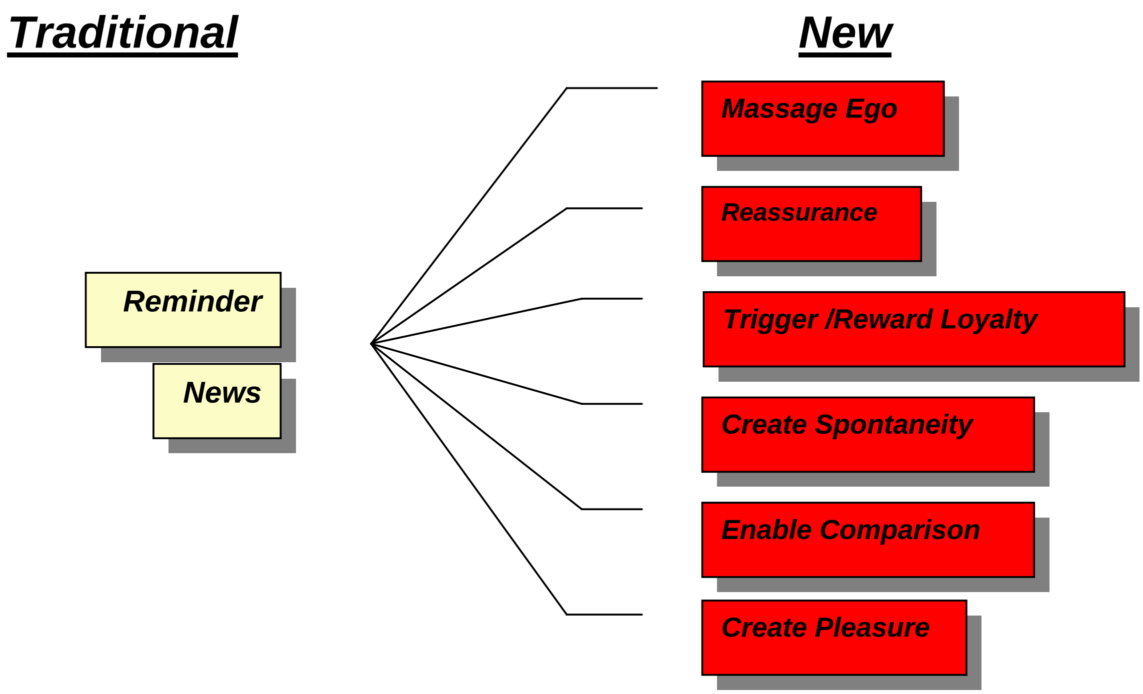
Reality: Grocery shopping is divided into two parts – cereals, grains and spices are in one group and toiletries and packaged food etc are in the other. While the purchase of former (which happens in large quantities) could follow the monthly purchase cycle, the rest is purchased in smaller quantities & could be done in different purchase bursts.
The smaller purchases allow the shopper to experiment & introduce variety into shopping while in bulk purchases the focus is on getting the quality right.

Idea/Imperative: Anticipate stock-outs and prompt purchase. CRM is going to help here tremendously. For instance a retailer needs to predict a regular shopper's sugar needs and reach out to him proactively.

New Role of last mile communication: ***Reward/encourage loyalty***

Conclusion

Though the retail landscape in India is still evolving but by busting these and some more of the prevailing retail myths, the study has been able to propose ***New Roles for the Last Mile Brand Communication***.



It may be pointed out that learnings from India's Dynamic Retail environment do not get over with this study. The retail landscape like many other things in India is in a constant state of flux with new formats, new players and an ever-evolving shopper. It is important for us to treat these learnings as a stop over in our journey to 'demystify' the Indian Retail Landscape. The tour is over but the journey continues.