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The commercialisation of shopping malls in India : from « creating » to « meeting » demand

(LA COMMERCIALISATION DES MALLS EN INDE : DE LA « CRÉATION » DE LA DEMANDE A SA « RENCONTRE »)

Yves-Marie RAULT*, Shawn MATHEW & Alexandre CEBEILLAC*****

ABSTRACT – *We explore the engagement of the Indian society with a new place of consumption in India —the shopping mall. Based on extensive interviews with managers and consumers across Indian cities, we address the commercialisation and the consumption of malls as two separate social fields and we highlight the frictions between them. Since the early 2000's, the rapid development of these commercial infrastructures addressed the perceived demand of the so-called "new middle class". However, the predominantly utilitarian conception of malls has often clashed with the actual uses of the diverse Indian consumer, whose need for safe and comfortable public places has transformed malls into major places of sociability, where a large number of users seldom consume or consume little. We argue that from "creating" a demand, agents in the field of mall supply have shifted their strategy towards "meeting" the demand, i.e. the need for specific "experiences".*

Key words: *Commerce de détail / Loisirs / Zone commerciale / Pratiques / Temporalités / Vacance commerciale*

RÉSUMÉ – *Cet article analyse la production et la réception d'un lieu de consommation qui s'est développé rapidement au cours des deux dernières décennies en Inde : les « shopping malls ». Nous prêtons attention aux stratégies des promoteurs et des managers pour expliquer la trajectoire de développement de ce secteur. Nous faisons l'hypothèse que les difficultés économiques de certains établissements sont la conséquence d'une mauvaise compréhension des dynamiques sociales et culturelles qui structurent la consommation des malls. Nous mettons ainsi en évidence les interactions, frictions et correspondances, entre le champ de l'offre et le champ de la demande de malls. Nous avançons qu'en Inde, la logique pratique du consommateur est réticente à la proposition souvent utilitariste des malls, ne permettant pas de « créer » une demande, d'où les récents ajustements des managers et le contenu de plus en plus « expérientiel » des nouveaux projets. Ces transformations visant à répondre plus adéquatement à une demande très variable localement et selon les groupes sociaux. Les malls indiens sont des endroits où s'expérimente la « modernité » et les modes de*

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vie d'une prestigieuse « classe moyenne », sans nécessaire traduction par un accroissement du niveau de dépense, expliquant souvent les difficultés à « fidéliser » une clientèle. L'arrivée des malls en Inde, ces infrastructures couvertes faisant office de nouveaux « espaces publics », est venue combler le manque d'espaces d'interaction sécurisés et confortables dans les grandes villes indiennes et sont devenus d'importants lieux de sociabilité, particulièrement pour les femmes et les jeunes. Ils s'adressent toutefois à une clientèle aisée dans une Inde ou le niveau de pauvreté reste très élevé, favorisant l'affirmation de barrières entre groupes sociaux. Dans une Inde de plus en plus globalisée, les malls ont en effet un fort capital symbolique et participent à construire et renforcer les identités des agents, dont les modes de consommation divergent selon l'appartenance de caste, de caste, ou encore l'origine géographique. Cet article souligne enfin la singularité des modes de consommation en Inde, les résistances à certaines offres commerciales, avec pour conséquence l'émergence d'un « marché » façonné par des dynamiques sociales et culturelles spécifiques.

Mots-clés : *Inde* / *Shopping mall* / *Commercialisation* / *Consommation* / *Globalisation* / *Identité* / *Modernité* / *Espace public* / *Classe Moyenne* / *Champ social*

Introduction

Since the early 2000's, an increasing number of private consulting companies have been monitoring the development of "brick-and-mortar retail" in India. Year after year, the likes of CBRE, Images Group, John Lang LaSalle (JLL), Knight Frank, or Pricewaterhouse Cooper (PwC), highlight the large and exponentially-growing "compound annual growth rates" (CAGR), a figure representing the investment returns forecasted in the sector. Recent reports also predicted that "More Doors" were opening (Deloitte)[1], "New Retail Frontiers" were getting crossed (Cushman & Wakefield)[2], and that Indian retail will be the "Next Growth Story" (KPMG)[3].

Recent media coverage of the difficulties experienced by some Indian "shopping malls"[4], however disturbed the narrative of the unstoppable "mall growth". After June 2012[5], several stories reported the existence of a series of underperforming and vacant malls, known as "greyfield" and "dead mall" estates, often transformed into corporate offices, banquet halls, cinemas, educational institutes, hospitals, or warehouses. In the abundant retail literature, these difficulties are typically attributed to a "supply-demand

[1] "Indian Retail Market Opening More Doors". 2013. Deloitte.
[2] "New Retail Frontiers: Emerging Main Streets in India". 2014. Cushman & Wakefield.
[3] "Indian retail, the next growth story". 2014. KPMG
[4] In India, "shopping mall" or "mall"are usually applied to enclosed retail structures, while "shopping centres" usually refer to open-air retail structures.
[5] "Premium malls feel the slowdown chill" (*The Hindu*, 11 July 2012); "Developers of shopping malls delay projects amid slowdown" (*LiveMint*, 12 July 2012); "India's shopping malls lose bustle as economy cools" (*Reuters*, 27 July 2012); "Watching India's Slowdown From Its Malls" (*Forbes*, 30 July 2012)

mismatch", mainly caused by deficient "marketing strategies", notably the inability to "build a mall culture" amongst the "target customers" in India. In this article, we will argue that certain commercialisation practices of malls promoters, as they try to "create" rather than "meet" the demand, often fail to integrate the specificities of Indian consumers embedded in complex social structures.

The seminal works of Veblen [Veblen 1899] and Bourdieu [Bourdieu 1979] have demonstrated the importance social structures in explaining consumption levels and choices. In contemporary societies across the world, stratification systems, cultures, and identities indeed participate in shaping patterns of "mall consumption", as shown in recent ethnographic studies in shopping malls in Hong Kong [Lui 2001], Egypt [Abaza 2001], Turkey [Erkip 2003], Chile [Stillerman & Salcedo 2012], Argentina [Miller 2014] or Indonesia [Van Leeuwen 2011]. In India, previous studies of physical and online retailing conducted by the authors of this article confirmed that history and culture [Rault 2015a], reference groups [Rault 2015b], socio-economic origins [Cebeillac & Rault 2016], aspirations [Rault 2017], or decision contexts [Mathew 2017] have a significant impact on consumer practices.

In this article, we argue that the difficulties faced by certain shopping malls in India partly originate from the misunderstanding, sometimes the disregard, of local consumer practices. To understand the complex construction of this fragile "mall market" in India, we borrow the concept of "social field" from Pierre Bourdieu [Bourdieu 2005] and analyse the disconnections between the field of mall supply (investors, developers, managers, and retailers), and the field of mall demand (consumers). In order to do so, we primarily mobilize extensive retail literature and interviews with mall users and managers in Delhi, Kochi, Ahmedabad, Mumbai, generally conducted *in situ* between 2015 and 2017. We broadly aim at highlighting the tensions arising from the encounter of a "global" and "consumerist" product with the Indian demand.

1. The development of malls in India: from "mania" to slowdown

The first complexes clustering a significant number of stores, restaurants, and entertainment areas, connected through walkways, often in covered buildings, first appeared in the USA in the 1950s. With large parking areas, often located in city suburbs, the multiplication of these commercial projects initially addressed an increasing demand for consumer goods and services and were permitted by the better mobility induced by the rapid development of automobile ownership. These "shopping centres" or "shopping arcades" reached Europe in the 1960's, and at the same time they started declining in rich countries, they started developing fast in several Asian countries in the 1990's, where they are commonly known as "shopping malls".

In India, the first malls opened in 1999. The merchants' concerns to provide a diversified commercial area to customers was however not recent, and can be observed in the example of *bazaars*, these more or less enclosed marketplaces where goods and services are sold. The main commercial form for a long time, they however failed to respond to a rapidly emerging consumer practice in India — "shopping". The shopping malls, with the particularity to be covered, climate controlled and lighted, designed to host a variety of stores, were heavily promoted from the 2000's onwards by a set of large groups perceiving a growing demand for this type of "modern" infrastructure. As an outcome of this "mall mania" [Sinha & Kar 2007], recent estimates find evidence of 873 operational malls of all sizes [Rault 2017], including 40 very large complexes, i.e. larger than 50,000 sq. metres[6], which are generally found in large cities (more than 2 million inhabitants). These "mega malls", requiring large investments, remain rare in India, and the most common categories consists of "conventional malls", with a typical anchor store to attract customers, along with a few eateries, and the "lifestyle centres", where the focus is on food, wellness and entertainment services besides shopping. Less common forms are the "luxury malls", focused exclusively on luxury brands, some "outlet malls", selling products directly through their own brands, and "theme-based malls", proposing specific services like gaming or specialised products like cars.

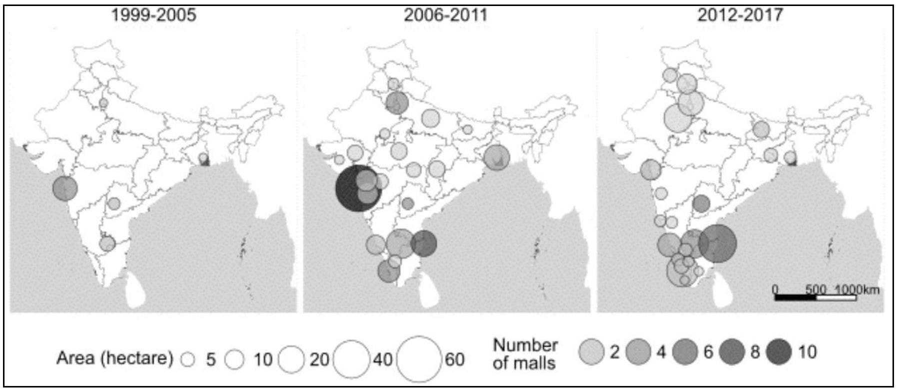

Figure 1 – The phases of shopping mall development.
Source: Wikipedia, 2018

The perception of the growing buying power of a "new middle class" has attracted a range of foreign and domestic investors. According to market research, the inflow of Foreign Direct Investment in retail constantly increased between 2000 and 2015 (IBEF 2016), notably encouraged by recent

[6] The list of the main shopping malls in India were collected with Wikipedia contributors https://en.wikipedia.org/wiki/List_of_shopping_malls_in_India (retrieved on 15.03.2018)

legislations allowing 51% FDI for multi-brand retailers and 100% for single-brand. Particularly, the real estate's retail component attracted 29 per cent of total investment in the recent years (IBEF 2016). In the past decade, several large Indian groups, often in collaboration with foreign investors, have invested in brick-and-mortar retail, predominantly in large agglomerations. Despite a recent increase of construction projects in secondary cities, 73 cities with more than 300,000 inhabitants and 7 cities having more than 1 million inhabitants did not count any mall in 2015. The lack of investment in secondary cities is generally attributed to the scarcity of supporting infrastructures and the absence of a large consumer base. As a consequence, 62% of the total mall space is located in two cities, Delhi and Mumbai. Bangalore and Chennai come second with a combined share of around 20%[7].

In India, shopping malls are generally located in residential areas, following the patterns of rapid suburbanization. The site selection depends on a range of factors determined by local urban dynamics, including the proximity of an affluent population, the access to roadways and public transport, as well as the cost of land. In Delhi, which contains 39% of the total mall space in India[8], we find that shopping malls are often located along metro lines, in middle-class and upper middle-class neighborhoods. For instance, Noida (New Okhla Industrial Development Authority), a planned city initiated in Delhi suburbs in 1976, whose per capita income is the highest in the whole National Capital Region, contains around 25 malls. The number of Facebook "check-ins" in malls in allow us to see that among the 167 malls referenced on Facebook in Delhi, a few malls located in affluent neighborhoods in Delhi are the most popular[9].

A recent survey however reported that over a sample of 95 malls in Delhi, only 13 of them were making significant profits, while the others were struggling to sustain, when they were not operating at a loss[10]. While the few best-performing malls have an average vacancy level of 10%, the levels of the other 86% are around 30%[11].

[7] "Challenges for retail real estate in India's transitioning society". 2014. JLL India

[8] Ibid.

[9] The "check-in" are the locations added to posts on Facebook. They were collected on the Facebook API (https://developers.facebook.com/docs/places/fields) over a period of 13 days in August 2018. The places in shopping malls were aggregated based on their proximity. Malls with the highest number of "check-in" are the Ambience Mall, Gurgaon (10664), the Select Citywalk, New Delhi (9219) Pacific Mall, Rajouri Garden (6264), and the Gaur Central Mall, Ghaziabad (5336)

[10] "Monthly Real Estate Monitor 2015". 2015. JLL India

[11] Ibid.

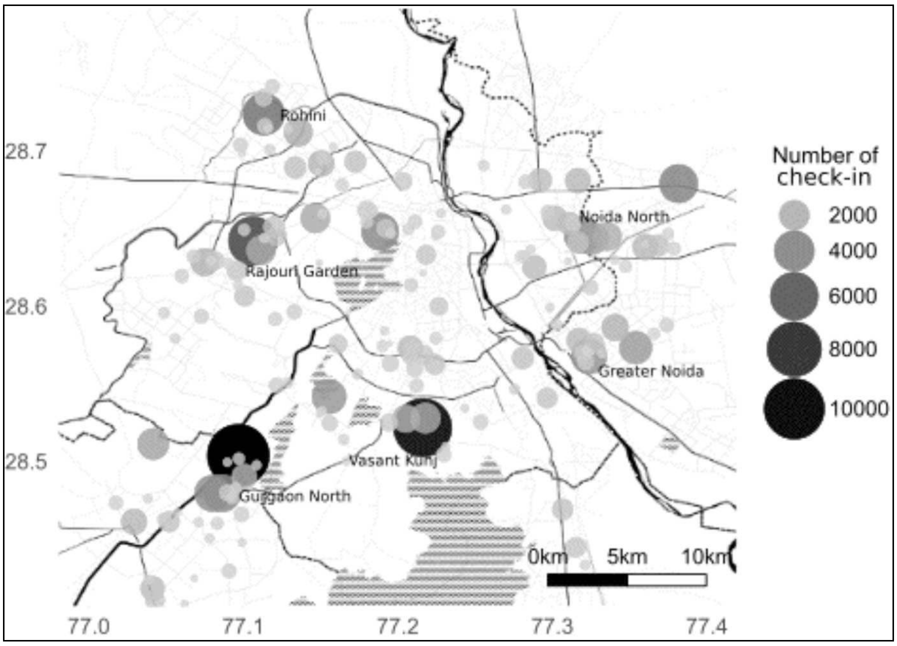

Figure 2 – The location and popularity of malls in Delhi.
Source: Facebook

In India, due to poor location choices, inadequate design, poor maintenance, inadequate mix of stores, prohibitive rents and maintenance charges, several malls failed to attract and retain a sufficient number of customers —retailers and visitors. Certain experts also put forward other explanations such as the growing competition from online retail in India, or cyclical factors like the global economic recession. In the past 5 years, the development of retail space slew down and some year completely stopped. In 2016, while 13 malls got completed, 15 others stopped operations during the year, resulting in 90 000 square metres decrease in retail space[12]. Several professionals reported that a large number of the Indian malls —some said 90%, were financially struggling, with only three quarters of them being able to generate profits till date. Some expert reports also suggest that several other complexes might meet a similar fate in future and that the number of completions is expected to decrease significantly over the next decade[13]. Recent episodes of projects being deferred, if not cancelled, in light of the dramatic increase in establishment costs, suggested an increased perception that the brick-and-mortar model of retailing might be laden with risks. Several actors of the industry, managers,

[12] "Winds of change. Fuelling the renewed interest in India Retail Real Estate". 2016. JLL
[13] "Challenges for retail real estate in India's transitioning society". 2014. JLL

investors, and promoters, admittedly failed to adapt the content of their offer to complex local demands due to poor “market research” and “positioning strategies”, which revealed a lack of understanding of consumer motivations [Suresh 2013].

Figure 3 – In the Dev Arc mall and R3 mall in Ahmedabad, only multiplexes (movie theatres) have found their public.
Source: Shawn Mathew, 20.03.2018

2. The “new middle class”: over-estimates of a “target market”

Over the past decade, the extensive media coverage of the “mall mania” came as an illustrative argument for the birth of a “consumer society” in India [Saavala 2010, p. 120], a country where the spiritual experience was traditionally said to transcend the sensorial and the material [Srivastava 2011, Mathur 2013 p. 101]. Coincidentally, the emergence of a “new middle class” became the centre of political attention and significantly contributed to the narrative of a “shining India”[14] [Fernandes 2000a, 2000b, 2006, Fernandes & Heller 2006]. But is the “consuming middle class” a mere discursive phenomenon? If between 1980 and 2014 the GDP per capita increased by over 600%[15], only a small fraction of the population, mainly in urban areas, grew richer [Subramanian & Jayaraj 2015], and India remains today a predominantly rural country with the top one per cent of the population possessing 58% of the total wealth[16], 22% of the total population below the poverty line, and 58% living on less than $3.10 per day[17]. The estimated size of the middle class may actually vary between 300

[14] “India Shining” was a marketing slogan invented by an advertising firm for a political party in an election race to bank on a general feeling of economic optimism in India.
[15] “Household final consumption expenditure (current US$)”, World Bank, retrieved from https://data.worldbank.org/indicator/NE.CON.PRVT.CD on 13.11.2017
[16] “Global Wealth Report 2016”. 2016. Credit Suisse Research Institute
[17] “Poverty & Equity Data”, povertydata.worldbank.org, retrieved on 07.09.2017

million (25%) when using national standards[18] and 20 million (1.5%) with global benchmarks[19,20].

The misrepresentation of the size of the "target market" appears to be one of the reasons why certain malls did not find a clientele. The Indian consumers would often prefer to go in less expensive markets, where they can find comparable products for prices which are 5 to 10 times lower. With the development of information technologies, shoppers are more educated about the pricing and quality of consumer goods. They notably show awareness that most malls' products often come from the same factories as street merchants', making malls "overpriced". Even certain well-off consumers would prefer shopping in duty-free stores or commercial centres outside India, often in the Gulf countries, to avoid the high taxes on luxury and international goods in India.

This attachment to the "fair price" translates into strategies to obtain certain goods available in malls without paying their full price. A recent study about the use of online coupons in five large countries, poor and rich[21], has shown that couponing is significantly higher in India. The study also reports that 95% of Indian shoppers spend a substantial amount of time trying to find the best deal, while 92% of the surveyed people mentioned that discounts were the main driver for shopping. It is thus important for the Indian shopper that he "grabs a bargain". Numerous shoppers confide they visit malls more frequently during flash sales, in the hope of getting goods at a much cheaper rate. As a consequence, the number of sales periods, previously limited to the end-of-season sale, now sometimes spread throughout the year.

Lately, several mall managers have also integrated that users often came to try out products only to buy the same ones online at prices sometimes reported to be three times cheaper. They often want to see what is "fashionable", "trendy", "in", i.e. to source information rather than products. As a consequence, malls increasingly have to present themselves as mediums to advertise and create brand awareness rather than as places of purchase. In order to limit the flight of customers to fast-developing online platforms in India like *Myntra*, *Jabong, Amazon*, or *Flipkart*, certain malls have also adopted "omnichannel strategies", exemplified by the "e-malls" where retailers' products can be bought online, often with discount, and home-delivered.

The prevalence of "value conscious" rather than "brand conscious" consumers stand in contradiction to the image of a middle class with expensive

[18] "How India Earns, Spends and Saves". 2010. NCAER Centre for Macro Consumer Research. SAGE
[19] "The Global Wealth Report 2015". 2015. Crédit Suisse Research Institute
[20] For an exhaustive account of the different modes of calculation and estimates of the size of the middle class, see Krishnan & Hatekar 2017, p. 41 Krihnan, Sandhya, et Neeraj Hatekar. 2017. "Rise of the New Middle Class in India and Its Changing Structure". Economic & Political Weekly 52 (22), pP; 40-4841.
[21] "How people shop and use coupons globally". 2015. Cuponation. This study used data from Google trends, Google Keyword Research, and CupoNation Internal database.

behaviours. Certain cultural elements, from the gandhian ascetism to the nehruvian anti-consumerism, prove to resist to the "*mindless and heartless consumerism […] borrowed from the affluent societies of the West*"[22]. The practices of the Indian consuming agents also seem to be influenced by an age-old culture of "save and prosper", illustrated by a tendency to spend less than their income and save large amounts for securing the future of their families. Often prompted by a large exposure to life risks, with low levels of social protection in India, the awareness that money should be spent with care is what Indian sociologist Sanjay Srivastava calls a culture of "consuming and saving", where the capacity to save is more valued than the capacity to consume [Srivastava 2015, p. 243].

As a consequence, among regular mall users, only 20% would be "serious buyers", with substantial disposable income at hand, while the remaining 80% consists of "casual buyers", mainly youngsters, who come to familiarise themselves with the latest fashion trends or spend time with friends [Mathur 2010]. To tackle the issue of "low spenders", retail specialists have segmented the mall users into various categories. These include visitors who enter the mall and head for purchase, thereby becoming "customers", called "C"; and the "shoppers", called "S", who visit simply for recreation and entertainment but do make any purchase. These two categories make up the C/S ratio, a common metric used to measure the consumption behaviour in malls, often reported low in India. The average sales density —the revenue generated for a given area of sales space, is actually equivalent to 400 rupees per square metres per month for Indian malls, almost 3 times lesser than the score of similar infrastructures in Bangkok (Thailand)[23].

3. Comfort and sociability: malls as new public places

Accounts of mall managers report that the problems of several malls in India has not been the quantity of footfall but the "footfall conversion", i.e. the conversion of shoppers into customers. Most practice-oriented studies actually highlight that the main motivations of customers are "Shopping"; "Watching a movie"; "Meeting friends"; "Dining out"; "Enjoy ambience"; "Window shopping" [Mohan & Tandon 2015] or the "ambience", the "physical infrastructure", the product proposition, the "convenience", and the "safety and security" [Singh & Sahay 2012]. A notable exception is a 2009 study of the motivations of mall users in Ahmedabad where the authors identified six hedonic shopping motivations – "shopping enjoyment", "gratification shopping", "idea shopping", "shopping for aesthetic ambiance", "roll shopping", and "social shopping". These studies, however, fail to hierarchize

[22] Finance Minister Manmohan Singh, budget speech of July 24, 1991
[23] "Retailers' Trading Densities in Indian Malls". 2013. ASIPAC

these motivations and tend to underestimate the underlying social motivations of mall users.

Probably constrained by the rigid requirements of survey methods, they do not grasp that these activities imply a need for social interactions —few mall users ever come unaccompanied in India. Hence, consumer motivations have been adversely affecting the "marketing strategies" of promoters and managers focusing on "individual shopping". In India, where aloneness is often depreciated or considered suspect, malls are treated as places to meet friends or relatives over a drink, food, or a movie. To attract shoppers, vacant spaces have thus often been re-invented into seating areas, kiosks, vending machines, ATMs, interactive information points and activity centres for children. These offers, however, emphasise on categories such as food and beverage (F&B) and entertainment and might not include the whole array of brands present in the malls. Most surveyed shoppers in Delhi actually admitted that they feel more comfortable spending time in malls than in the "crowded", "dirty", "noisy", "inconvenient" open markets.

As a consequence, "hanging out" has often become synonymous with shopping and eating at the mall. Hence, most shoppers visit malls when they have free time in common, i.e. on weekends. The average footfall in *LuLu International*, India's largest mall, is 55 000 on weekdays, while the average footfall on weekends is more than 85 000, most of it on Sundays[24]. Facebook "check-in" data of shopping malls in Delhi, consisting of the number of statuses posted on the social media, including the localization of the user, show us that the number of mall visits on weekends is twice that of malls visits during weekdays.

One major reason for spending weekends in shopping mall is probably the paucity of other quality "public" spaces in urban areas in India, where social control is not ubiquitous. Since very few child-friendly open spaces are available in large cities for family outings, malls have also become a place where parents can walk their children. In the increasingly polluted Indian cities, with climatic conditions (rain and heat), preventing outdoor activities in certain areas, the air-conditioned and noise-free shopping malls are comfortable places to hang out in and malls continue to be perceived as convenient social hangout places. The different social groups hang out at different times and days. For examples, during weekdays, most housewives come between 11 am to 3 pm, students from 4 pm to 7 pm, and families from 7 pm to 10 pm. Similarly, the various stores are visited by different segments of the population. For example, the grocery area is visited more by middle age groups, theatres by families, and the music shops by youngsters.

[24] "Shopping Center Facts and Stats". 2017. retail.franchiseindia.com, retrieved on 11.10.2017 from https://retail.franchiseindia.com/article/whats-hot/property/Shopping-Center-Facts-and-Stats.a5708/

Youngsters, particularly, have rapidly adopted these new spaces. A 2014 study conducted across the five largest Indian cities on 690 children between 8 and 16 years old, has found that 20% of them picked up shopping malls as their favourite hangout destination (12% picked public parks)[25]. The young categories, despite their limited incomes, form a substantial portion of the mall visitors —a majority of mall visitors come from the 18-35 age group. However, due to their low purchasing capacity, the malls are often used solely as a hangout space and the consumption in the malls are limited to that in food courts. Malls became important meeting points for friends, as they provide freedom, far from the family constraints of the parental homes, and is perceived as a place where youth rituals and young adult life can run its course [Srivastava 2015, p. 249].

Shopping malls also have the reputation to be "safe" spaces for women, who have limited options to go out —their public spaces are often constrained to their homes. In some malls, the number of women visitors outnumber the men by 100%. Indian women often have unique ways to spend their free time within the confines of the conservative society. The "kitty parties", for instance, a gathering where housewives meet over food or drinks in daytime, are often arranged in malls' restaurants and cafés, which are perceived to be better meeting places than their homes. Most malls are designed after taking into consideration this demand for more areas for social interactions, for instance by increasing its options for food and beverage (F&B) and the entertainment in their complex.

A shopping mall is however not a public space in the sense of a "concrete place where people from all walks of life meet and interact with one another" [Houssay-Holzschuch & Teppo 2009, p. 353]. As Malcom Voyce [Voyce 2017] argues, the material and symbolic barriers of the Indian malls filter the "undesirable" clientele, encouraging the social homogeneity of mall users. Consuming at malls is an activity for groups who have sufficient disposable income and time, and act as an important act of differentiation from other segments which are excluded from the consumption sphere. This activity has thus become a marker of middle-class belongingness in India [Varma 2014, Rault 2017], and successful malls are able to identify with this group, which is perceived to be linked to the ideas of material comfort, wealth, and consumption in India [Saavala 2010].

4. The middle classes: diversity of a "target customer"

India's middle class is probably more complex than the image drawn by retail literature and the media. From the early works of B.B. Mishra in the

[25] "Urban trends: Outdoors is out, kids pick malls, cafes over parks". 2014. *Hindustan Times*, retrieved on 02.04.2018 on https://www.hindustantimes.com/india/urban-trends-outdoors-is-out-kids-pick-malls-cafes-over-parks/story-c3UDOG5y5KSlim9Udvy9RL.html

1960's to the extensive literature produced from the 1990's onwards, sociologists have generally preferred the term "middle classes" (in the plural form) to insist on their heterogeneity. Alongside class identities, India's social structures are actually shaped by a prevalent caste system and varieties of social groups based on diverse ethnic, linguistic, and regional origins. Testimonies of mall users in Delhi illustrate how these groups are critical in motivating consumer behaviours:

User 1*: "Punjabis are all money, no brain. They come to the malls with their big cars and would buy some Louis Vuitton bag just because their cousin has one."*

User 2*: "The Punjabi community they can spend in few days what they earn in a month. That's why you see so many of Punjabis in shopping malls as compared to Marwaris."*

User 3*: "You won't see many banias {merchant caste} in malls because they are very kanjoos. "Kanjoo" is basically when a Bania goes to buy a Ray Ban in Connaught Place, and a friend of his is calling him from Dwarka to say he has discounted watch, he will drive all the road to get a discount."*

Previous research on luxury places of consumption in Delhi also highlighted the existence of diverse consumer practices based on the unequal possession of cultural and economic capital amongst the middle classes [Cebeillac & Rault 2016]. For instance, the "old money", stemming from old and wealthy families, visit different places of consumption than the "nouveau riches". They give their presence in malls a meaning extending beyond the simple will to consume, insisting on individual motivations (rather than collective impulses) such as their "passion" for fashion. In addition, they would look down upon those who are conspicuous about their consumption habits, as evident from behaviours like "wearing loud colours", "showing off brands", or "clicking selfies". In contrast to the conspicuous customers, "regular customers" and "serious buyers" do not feel the need to display activities of luxury shopping, as consumption at these malls is a habit for them. They build their social status not by displaying their capacity to consume but by their way of consuming and consumption choices, as it was highlighted in the work of Pierre Bourdieu, *La Distinction* [Bourdieu 1979]. In doing so, they distinguish themselves from the groups which are lower down the social strata. The following snippets from shoppers in the author's research [Cebeillac & Rault 2016] show the working of the process of identification and differentiation from other social groups.

User 1: *"You know the very fact you are coming to the mall is in itself a statement. But the question comes that maybe you are not shopping in there, and maybe it is just a show: "I visit this mall and I buy something once a year".*

User 2: *"See there are two different kinds of people. Some just go for windows shopping in malls, I go for buying. The Emporio is somewhere where not much people would be able to spend because as you see it is only about* *brands and luxury brands sectors."*

User 3: *"Obviously there are two kinds of people. One who shop for brands, one who shop for their own taste. I shop for my own taste; I don't go for brands."*

User 4: *"What malls have created is something which is giving you luxury and status symbol. So mall is a status symbol and going to the normal market is not such an upscale thing".*

Mall managers report that the social complexity and the diversity of the Indian consumer make it difficult to respond adequately to the demand. If they increasingly interact with customers and conducts surveys, notably to optimise the brand mix, they still lack information about the social background of their customers. The simultaneous existence of class, caste and other identities participate in constructing a polymorphous field of mall consumption. The identification and differentiation to multiple reference groups and the construction of the consumer as an individual generates a multiplicity of practices often difficult to grasp for mall promoters.

5. The "consumer response": the mall as an "experience"

Mall promoters widely acknowledge that some of their initial strategies have often failed to take into account local specificities, which has contributed to the failure of several malls. In the search of rapid profits, premature sale of the mall space by the promoters to a large range of retailers, have often resulted in malls containing stores which do not match the customer tastes. One of the "consumer response" has consisted in the implementation of leasing models so that the managers can adapt the "retail mix" to the content of the demand[26]. Particularly, the proportion of entertainment options such as restaurants, food courts and cinemas, responding to a demand for places of sociability, has dramatically increased. The organisation of cultural events to attract local customers, such as themed events highlighting Indian festivals, food festivals, handicraft exhibitions, and celebrity visits, have become more common.

Mall promoters now also recognize that the construction of large malls, providing the diversity and number of shopping and entertainment options, is a requirement to attract faraway customers, and industry experts forecast that the average size of the mall will keep increasing in the years to come[27]. *LuLu International* in Kochi, India's largest mall by size, is an example which showcases this recent trend. It was opened in Kochi on March 2013 and contains more than 215 outlets detailed over 230 000 sq. metres. Promoted by the Abu Dhabi-based *LuLu Group* as a "destination mall", a commercial place attracting customers because of the popularity of its flagship stores. *Lulu*

[26] "Mall Management – A Growing Phenomenon in Indian Retail Industry". 2007. JLL
[27] "Changing landscape of Indian retail". 2012. JLL India.

International customers, coming from across Kerala, tend to consider the trips as means of entertainment, rather than as a place to purchase goods and services.

The "positioning", i.e. the building of specific mall identities, plays an important role in attracting a "targeted clientele" who can recognize oneself in it. For example, the *Select City Walk* in Delhi is positioned as a "neighbourhood fashion mall". It defines itself as a "fast fashion" provider, and consciously stays away from high-end brands and hosts brands that middle-class segments can afford and relate too. The "A-class"-malls[28], aimed at the upper segments of the middle class, have been more profitable than the "B-class" and "C-class" malls, which address a larger clientele. In fact, the lowest categories of shopping malls have been designed in order to satisfy a demand for utilitarian goods and services, which are consumed for their practical uses and are based on essential needs [Khan & al. 2005]. They seldom propose to their clientele other forms of leisure than the mere act of purchasing, hence they are unable to attract an Indian shopper reluctant to use shopping mall solely for practical purposes.

More particularly, attractive malls are the ones perceived as "modern" and "global". Hence, malls increasingly present themselves as spaces of the "affluent" and "cosmopolitan", as international platforms for the global customer. As Srivastava puts it, "the *conversion of nehruvian spaces of production into consumerist ones is commonly imagined within contexts that link Indian consumer culture to "global" standards, experiences, expectations and styles*" [Srivastava 2015, p.221]. To highlight these attributes, mall promoters notably put forward international brands in the facade or on the ground floor. The presence of domestic brands are also crucial factors in attracting footfalls, but they should have a "modern" image, like the ethnic chic products of *Fabindia* or the chai (Indian tea) chain *Chaayos*, designed and managed like a *Starbucks*. When it opened in 2003, the 14,000 square metre, three-storeyed *Centre One* was the "first world-class mall" in Navi Mumbai. But competition from larger, newer malls such as *InOrbit* and *Raghuleela*, which came up nearby, drew the crowds away. This appears to be a common trend in malls in India, where in the initial years, customers come in numbers, but as the mall grows "old", the Indian shopper turns towards newer complexes. The life cycle of these malls seems relatively short and might be as less as a few years. Along with giving consumers a sense of being a "modern and global consumer", malls provide a taste of what is perceived as "first-class" or "five-star" lifestyles [Brosius 2013] and participate in a "project for a beautiful life" [Mathur 2010, p.168]. In India, the capacity to practice shopping activities is perceived as an achievement, reflection of a "good and modern life", and gives the

[28] Several criteria are used by real estate consulting agencies to classify malls as either A, B, C or D, including the sales density, the location quality, and the quality of the infrastructure.

consumers the feeling of “having made it” [Brosius 2013, p. 8]. As a consequence, they are often associated by their users with ameliorative adjectives like “niche”, “upper”, “high”, “top”, “superior”, “premium”, “upscale”, “elite”.

The perception of malls as an elite place provide a “social experience” to the users, i.e. a practical contact with the lifestyles of a different social class. This is reflected in the presence of a large number of lower and middle-class shoppers in luxury malls. These users are easily noticed as they do not feel comfortable enough to enter the shops and remain in the alleys, observe products through the window, and limit themselves to buying a beverage in the cafés. Several users met in certain “famous” malls confirmed that they did not intend to come again once they “visited” it, highlighting the difficulty for mall managers to create “customer loyalty”. They “experience luxury” (slogan of a luxury mall in Delhi), but do not buy it. This has had a severe economic impact on certain “brands” which are trying to create a “culture” and an “addiction” amongst Indian customers. For instance, *Bottega Veneta,* an Italian house specialized in leather goods, had to downsize its store area by half and move it to an older section of the *DLF Emporio*, a luxury mall in Delhi. Accounts of shop sellers in malls, reporting the lack of customers in their stores, paint a similar picture validating the trend.

The focus on providing a wholesome experience to the prospective shoppers is employed as a counter measure to the rising competition from e-commerce actors by providing quality infrastructure and recreation activities which cannot be provided online. Improving the “consumer experience” or “CX” has thus become a key role of mall managers [Prashar & al. 2017]. At all stages of consumption, the customers must have a satisfying rational, emotional, sensorial, physical, and spiritual interaction with the mall to retain the user long enough to consume. This has resulted in a focal shift to “emotional” or “experiential” marketing, with activities like sending potential customers images of the emotions and experiences that they could feel while coming to the mall, becoming common place.

Conclusion

This work tried to analyse the interactions between the supply and the demand of malls, i.e. the construction of a “mall market”. We used the field theory to highlight how production and consumption activities are shaped by the social representations and practices of the agents in their respective field. It allows us to better understand the pattern of development of an emerging economic sector by looking at the dynamics underlying its supply and demand sides. In India, there is still around 9 times lesser available retail infrastructure space than in China[29], which underscores the specificity of the growth trajectory of the sector.

With globalization, a “consumerist ideology” is often said to have pervaded cultures across the world, consisting in what is called “mass consumerism” [Sklair 2012]. Shopping malls, more particularly, are often given as the most representative example of a place where people are encouraged to consume through the configuration of space and the consciously designed symbolic landscape [Goss 1993]. Anthropological works in shopping malls around the world however suggest that the so-called “consumer revolution” is not necessarily homogenous and might consist of many consumer revolutions. This view highlights consumption as a habit deeply entrenched in people’s culture, and thus difficult to change [Appadurai 2005, p. 124].

This contribution should not be mistaken as an attempt to provide new guidelines to shopping mall practitioners. By its interdisciplinary approach, it rather tried to highlight the difficulties of agents on the supply side to impose a consumer product — “create” a demand, to a population with complex practices and representations. We generally aimed at engaging with the conscious and unconscious resistances of individuals and social groups to globalized consumption models. India’s shopping malls are a good example of how a commercial product, intended for a specific use, has been practically diverted into something else. The evolution of shopping malls in India highlights the creativity and resistances of local societies to an increasingly pervasive consumer culture brought about by globalisation.

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