

Turning Around Tier-2 Food Courts

Client Overview

- Leading Indian Real Estate & Infra Conglomerate
- Operates 25+ malls and food courts across Tier-1 & Tier-2 cities
- Focused on retail footfall monetization through food & beverage formats

Current Business Situation

- Mall footfall has recovered to ~90% of pre-COVID levels
- Yet Tier-2 food courts underperform due to:
- Weak stall conversion (~18–22%)
- ~35% kiosk inventory unsold
- Low repeat visitors or dwell time

Why This Matters

- Food courts are critical anchors to increase dwell time and retail spend
- Underperformance in Tier-2 cities hurts regional revenue diversification
- Timely turnaround can unlock up to ₹2–3 Cr/month in added revenue potential (based on 5–6 malls)

Boosting Conversion & Vendor Revenue for Socbiz IITR

Market Snapshot

- Indian Mall Market Size: \$10B+ by 2026 (CAGR ~7–8%)
- Tier-2 cities like Indore, Kochi, Vizag are growing 2x faster in footfall recovery post-COVID
- F&B spend is the largest retail category post-fashion in malls (30–35% of dwell spend)
- Competitive pressure from standalone cloud kitchens and delivery apps eating into dine-in



Key Offerings by Food Courts

- Stall rentals (fixed or revenue share)
- Visibility & branding (LEDs, hoardings, promotions)
- Food zone zoning & layout support
- Trial programs for new vendors (pilot kiosks, short leases)
- Central loyalty program (planned)

Strategic Objectives (60-Day Mandate)

- Increase Food Court Conversion Rate by 15%
- Improve Average Order Value (AOV) and Sales/Sq. Ft
- Boost Kiosk Occupancy via improved vendor onboarding and marketing support

USER PERSONA



Ritu & Anil – Value-Conscious
Parents (Age: 38 & 41)

"We want good food that won't cost a fortune
and a place where our kids can eat
comfortably."

Motivation:

- Affordable meals, clean seating, variety for kids
- Quick, value-for-money lunch/snack
- Hangout with friends, grab snacks before/after shows

Behaviors:

- Seeks combo offers and kids' meals
- Prefers clear menus and price boards
- Avoids crowds and long queues

Pain Points:

- High prices or unclear value
- Limited seating
- Lack of hygienic perception
- Confusing layout, slow service, no sampling
- Crowded

CONVERSION FUNNEL BREAKDOWN

Funnel Stage	% Conversion	Key Drop-off Drivers
Mall Footfall (Entry)	100%	Depends on location, day ,time
Footfall Reaching Food Court	~35–40%	▼ Poor signage & visibility ▼ Weak zonal layout ▼ Lack of thematic attraction or ambiance
Visitors Considering Purchase	~25–28%	▼ Unappealing or generic food mix ▼ Limited local options ▼ No discovery aids (menus, reviews)
Actual Transactions	~18–22%	▼ Price-value mismatch ▼ No sampling/trials ▼ Long queues or slow service
Repeat or Dwell-Time Buyers	<10%	▼ No loyalty program ▼ Menu fatigue ▼ Ambience not conducive to repeat dining

TIER-2 MALL VISITOR JOURNEY + RCA HYPOTHESIS MAPPING

Stage	Customer Action	Pain Point / Drop-off	RCA Hypothesis (MECE)
Mall Entry	Enters mall via main gate or parking	Does not notice or recall food court signage	⚠️ <i>Awareness:</i> Poor zoning & directional cues
Strolling in Mall	Browses stores or looks for entertainment options	Misses food court unless explicitly searching	⚠️ <i>Appeal:</i> Low visibility, poor mall layout integration
Food Court Discovery	Reaches food zone or is directed via map	Not attracted by ambiance or perceived “value mismatch”	⚠️ <i>Appeal:</i> Generic stall design, no digital screens, dull vibe
Menu Exploration	Browses stall options, pricing, and variety	Menus not visible, unclear combos, no trials	⚠️ <i>Access:</i> High mental effort to decide; no trial offers
Decision to Purchase	Considers affordability and wait time	Prices appear premium, delays due to staffing or POS	⚠️ <i>Access:</i> Price-value disconnect, slow service infrastructure
Dining / Seating	Seeks comfortable space to eat	Crowded seating or unclear zones (esp. for families/groups)	⚠️ <i>Appeal:</i> Lack of zoning, poor crowd management
Exit / Post-Purchase	Leaves food court post-meal	No retention mechanic (no loyalty, stamp, scan-to-earn)	⚠️ <i>Retention:</i> No structured engagement/loyalty touchpoint

WHY IS FOOD COURT CONVERSION LOW IN TIER-2 CITIES?

AWARENESS – LACK OF DISCOVERY & DIRECTION

- Inadequate Signage or Zoning: Many Tier-2 malls lack intuitive directional cues from anchor stores or cinema zones to food courts.
- No Digital Presence: Absence of digital maps, food court directories, or interactive kiosks limits spontaneous decision-making.
- Low Visibility in Layout: Food courts are often placed on upper floors or corners without visual hooks (e.g., aroma, lighting, sound).

APPEAL – WEAK DIFFERENTIATION & EXPERIENCE

- Generic Vendor Mix: Stalls often resemble each other in format and cuisine, lacking regional uniqueness or branded recognition.
- Monotonous Layout: Poor visual merchandising, dull seating zones, and absence of themed spaces hurt emotional engagement.
- Lack of Seasonal Variety: No concept of food festivals, rotating pop-ups, or regional promotions that excite repeat visits.

ACCESS – FRICTION IN ORDERING & VALUE PERCEPTION

- Unclear Pricing & Menus: Visitors struggle to compare options due to poor menu placement or absence of digital ordering.
- Slow Service & Long Queues: Understaffed stalls or manual POS lead to long wait times, especially during peak hours.
- No Trials or Sampling: First-time customers can't "taste before trust," which reduces impulse conversion.
- Limited Payment Flexibility: Some vendors only accept cash or lack fast digital payment modes like UPI QR.

POTENTIAL HIGH-IMPACT HYPOTHESES (FOR VALIDATION)

- Price-value mismatch is deterring conversion at final mile
- Absence of digital ordering/sampling is increasing friction
- Lack of re-engagement mechanics is hurting repeat spend
- Signage visibility and zoning design is limiting discovery
- Current vendor mix lacks emotional or regional connection

SOLUTION: DIGITAL QR MENU (DISCOVERY + ORDERING ENGINE)

System Features

- Scan-based digital access to full menus across all vendors
- Live order tracking, wait-time estimates & stall crowd status
- Real-time promotions (highlighted deals, combos, limited items)
- Feedback pop-ups post-purchase to capture satisfaction

User Story

As a mall visitor, I want to quickly explore food options, prices, and wait times without walking stall-to-stall, so I can decide fast and avoid queues.

Problem

Visitors are overwhelmed by stall variety and lack of visible menus. Many skip the food court due to indecision or perceived crowding.

Why this works

- Accelerates food discovery
- Reduces physical congestion and decision fatigue
- Increases perceived transparency, boosting trust and conversion

SOLUTION: VENDOR TRIAL WEEKS (ROTATING POP-UPS)

System Features

- Temporary “try & test” stalls rotated every 1–2 weeks
- Low CapEx shared kiosk format (with mall-sponsored infrastructure)
- Feedback loop via QR polls to evaluate vendor appeal
- Local/regional vendor inclusion for variety

User Story

As a customer, I want to try new food types without risk, so I can discover exciting options without committing to a full meal.

Problem

Low vendor appeal and lack of differentiation deter visitors. Unfamiliar names = low trust = low conversion.

Why this works

- Adds novelty & freshness to the food court experience
- Encourages footfall even from repeat mall-goers
- Offers a testing ground for future long-term stall partners

PRIORITIZING FOOD COURT INTERVENTIONS

Low = 1High = 3Medium =2

Solution	Adoption (Reach)	Impact	Confidence	Effort	Score (A*I*C / E)
Digital QR Menu	Medium (3)Reaches all smartphone-enabled customersesp. Gen Z/Millennials	High (4)Reduces friction, improves decision speed and queue handling	High (4)Tested in similar retail settings (QSRs, malls)	Medium (2)Requires menu digitization + QR stands	24
Vendor Trial Weeks	High (4)Drives new and returning footfall with novelty	Medium (3)Boosts curiosity-driven purchase behavior	Medium (3)Proven in F&B but variable vendor appeal	Medium (2)Setup + rotation logistics	18
Loyalty Program	High (4)Targets repeat visitors, mall staff, and frequent snackers	Medium-Low (2)Retention-focused, less immediate impact	High (4)Digital loyalty formats are familiar & low-risk	Low (1)Paper-based or WhatsApp-ready rollout	24
Zonal Signage Layout	Medium (3)Effective for first-time or low-intent visitors	Medium (3)Improves stall discovery and load balancing	Medium (3)Relies on design and visibility principles	Low (1)One-time print & vinyl cost	18