

# IMAGES

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Issue No.

# BUSINESS OF FASHION

April 2016

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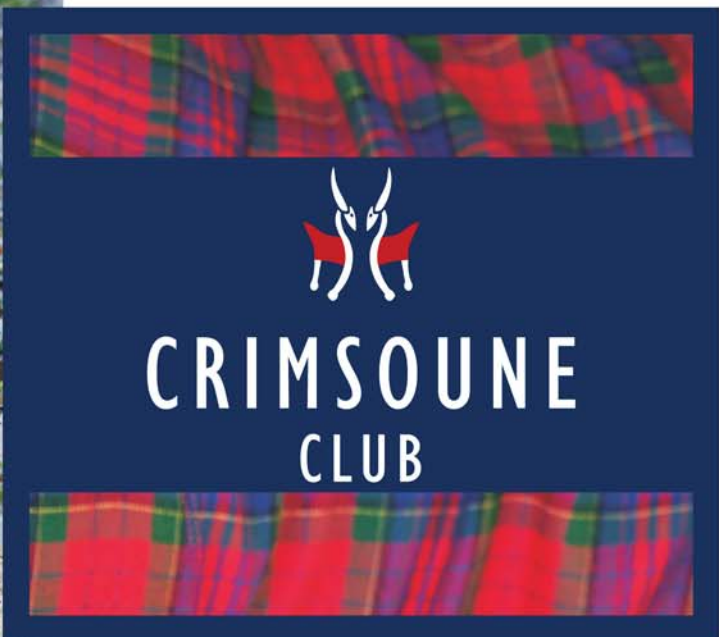
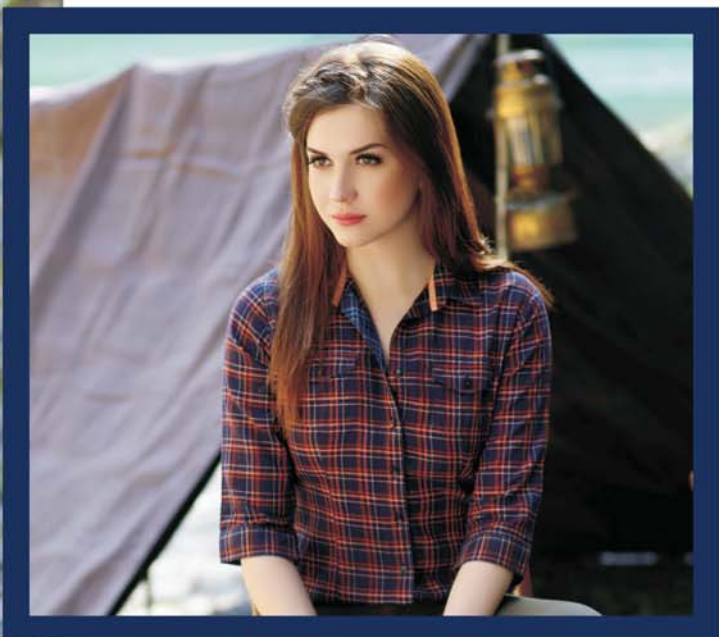
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Dear Readers,

The Indian fashion landscape is getting exciting. Just from January 2015 itself, the industry has seen the entry of many internally renowned brand in the country. For example, H&M, Aeropostale Inc., BCBG Max Azria, Church, Foster Grant, GAP Inc., Hunkemöller, Juicy Couture, Naul Poney, The Children's Place, and Wacoal, etc. Also, several other brands like Bulova, Galvanni, Selected Homme, Tom Tailor, Topshop and Topman, joined the e-commerce route to test waters before making the final plunge. Almost every month now we bring you updates on a new India entry.

The recent opening up for FDI for marketplace e-retail models will further empower several new changes in the retail scenario in the days to come. Diverse perspectives are being expressed with basically everyone speaking it out from where they are coming from. On several aspects, more clarity is expected/requested from DIPP. What is undisputed is that there are positive sides to the move; supply chain and logistics will rev up, it will protect and herald better expansion and leveraging opportunities for Indian brands. However, we should commend the ingenuity and continue supporting the development of e-retail. Taking too extreme positions will harm the overall development of consumption in India.

The 16th edition of the India Fashion Forum, (IFF) went miles in drawing a current and truly meaningful perspective to the business of fashion in India. Images BoF brings you a detailed report on the key sessions of the India Fashion Forum 2016. In the following pages, you will find deliberations

laden with gems of insight that, we hope, will propel the Indian fashion retail sector in the right direction. Presented by online giant Exclusively.com, the two-day extravaganza was hosted at Hotel Renaissance, Mumbai on the 15th and 16th of March, 2016.

Not to take anything away from the boys, but the three stars at this IFF were women. Billie Whitehouse, Co-Founder, Wearable Experiments; Innovator Designer and Creator—FUNDAWEAR, the IFF Marquee International speaker, enthralled the who's who present with her explication of the next generation of fashion wearables. Agnes Kubiak, Co-Founder and Creative Director of Style Vision, Paris, in her presentation elucidated on infusing the global insights to refresh the DNAs of Indian fashion and re-connect with the new age generation of consumers. And, Anupreet Bhui, Senior Editor, Street Style and Trend Specialist from Hong Kong, presented a glimpse of what to expect in Spring/Summer'17. The grand finale of the IFF were the Images Fashion Awards (IFAs), widely regarded as the premier recognition for excellence in fashion in India. Meet the winners in this issue.

Also in this issue we present a full coverage on the latest edition of the iconic fashion exhibition—Milano Unica XXII; Knight Frank takes an overview on the criticality of and the opportunities in the epicentres of fashion in India—NCR, MMR and Bengaluru; and lots more.

Hope you enjoy going through the issue.



**Amitabh Taneja**

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## LETTERS TO THE EDITOR



The cover story of Images BoF was quite enlightening. I have a small garment multi-brand retail set up. Although I am a small business but like all retailers I too face similar issues which are discussed in the cover story. Thank you for studying such issues.

**- Puneet Dudeja, Businessman, Ludhiana**



The constant endeavour of the editorial team of Images BoF to constantly bring interesting and informative content for its readers is appreciable. I am a professor for fashion studies and the magazine gives me enough fodder for my students to teach them on the latest developments and trends in the fashion industry.

**- Preeti Singh, Academician, Meerut**



I like reading about the stores section in the magazine Images BoF a lot. It tells about the brands that have arrived in a particular place or region. It helps me to study about that market and the crowd. If possible, please study how fashion is doing in specific malls and high-streets.

**- Samir Rana, Property Consultant, Mumbai**



I enjoyed reading the Images BoF special focus on Gujarat. It was very encouraging to read about the regions well known manufacturers. Keep up the good work!

**- Pradeep Jain, Businessman, Ahmedabad**



I am a regular reader of the magazine Images BoF for a decade now. I really liked the new look of the magazine. The layout is worth appreciation.

**- Meenu Bedi, Fashion Analyst, Pondicherry**

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## FASHION BUSINESS

### FORECASTS

#### WGSN's Top 5 Fashion Predictions for Pre-Fall 16

WGSN highlights some of the top women's wear trends to watch out for, in its catwalk analytics report, a data-based analysis that highlights important product shifts from Pre-Fall '15 to Pre-Fall '16.

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### BIG DATA

#### Put Your Fashionable Foot Forward As Big Data Meets Fashion

The fashion industry in India is rapidly evolving and with this, the need to predict the fashion trends on real time, too has become an unavoidable requirement. This is where 'Big Data' steps in to save the day for the fashion brands and retailers. Sunil Jose, MD, Teradata India, talks about Big Data and how it helps companies in turning extremely large quantities of data into useful information.

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### LEAD RESEARCH

#### The Epicenters of Fashion Retail in India

India is one of the important retail markets for retailers with Mumbai, NCR and Bengaluru being the biggest. Knight Frank studies these fashion epicenters. Extracts from its "Think India. Think Retail 2016" report.

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### BRAND WATCH

#### RUOSH: IT'S ALL ABOUT THE EXPERIENCE

Offline stores like Ruosh have crossed boundaries when it comes to making the consumer experience, the back bone of the store. Mohini Binopal, Co-Founder and Retail Head, Ruosh (Sara Soule Pvt. Ltd.), talks to IMAGES BoF.

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### CATEGORY WATCH

#### Easy On The Eyes



"From neighbourhood opticians to multiple touch points, eyewear retailing gets an accessibility makeover. An overview.

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### LAUNCH

#### LUX GLO

The renowned innerwear brand, Lux Cozi has introduced Lux Cozi Glo for the youth of today who yearn for stylish and attractive innerwear.

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### FLAIRMEN

A high-quality range of leather accessories that bridge the gap between elegance and functionality, we explore Flairmen's new stylish line of bags and wallets.

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## Fashion Business



### COLLECTION

#### DUKE

Inspired by the creative allure of Bali, apparel brand, Duke Fashions has launched its Spring/ Summer collection 2016.

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### Neva

The leading thermal and active wear brand, Neva has introduced its latest collection of 'Neva Summer Active Wear'.

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### Q&A

#### WOOLMARK

Arti Gudal, Country Manager - India, The Woolmark Company, shares her thoughts on India Fashion Forum 2016, The Wool Lab, and The Woolmark Company's focus on the Indian market.

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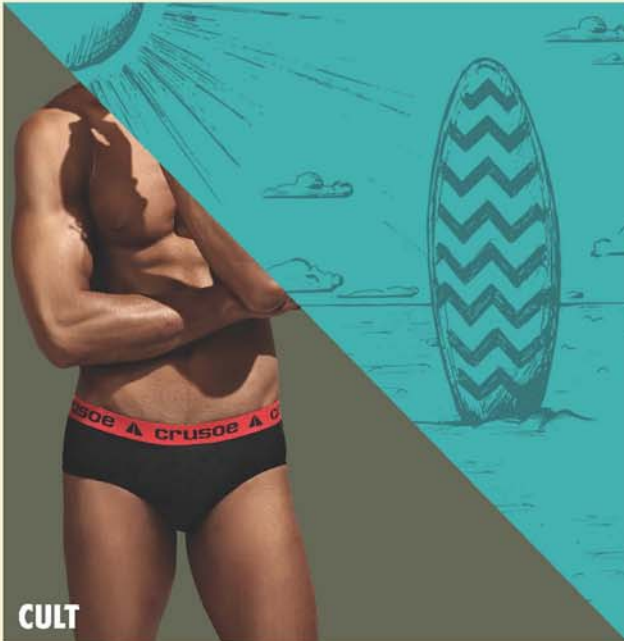
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The Ambassador of Italy to India and the Italian Trade Commissioner unveil the first ever Italian campaign in India, 'Italy: The Extraordinary Commonplace' and launch 'Le Dolce Vita - a celebration of Italian Fashion, Luxury & Lifestyle'.

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# WGSN'S TOP 5 FASHION PRODUCTS PREDICTIONS FOR PRE-FALL 16

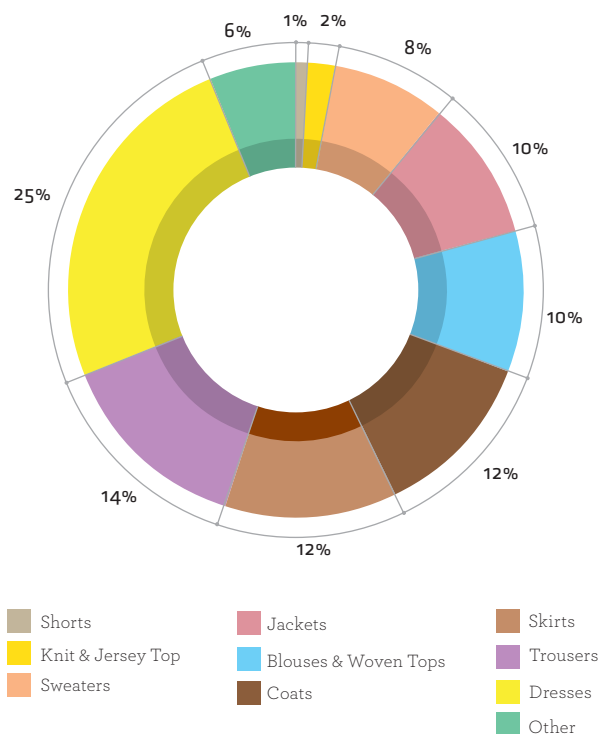
WGSN's catwalk analytics report is a data-based analysis of the catwalks that highlights important product shifts from Pre-Fall '15 to Pre-Fall '16. In our analytics review of the Pre-Fall '16 collections, we highlight some of the top women's wear trends to watch out for across the different product categories.



## DRESS STYLES INCREASE AS CONSUMERS MOVE AWAY FROM SEPARATES

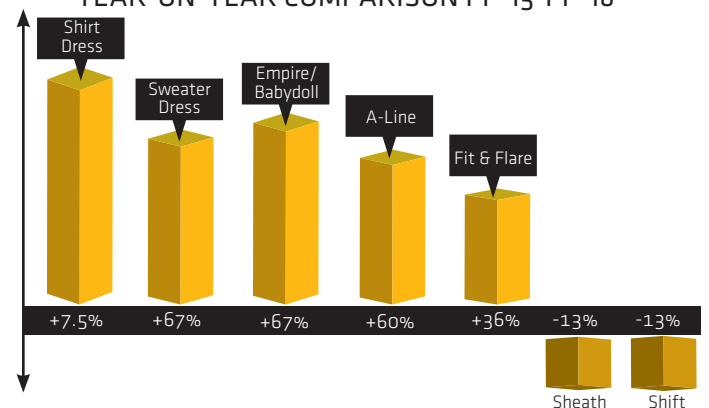
Dresses claimed the highest share of total mix with 25 percent, a 9 percent year-over-year increase, in line with the SS'16 catwalks. Trending dress styles for Pre-Fall '16 include the column dress, peasant/poet dress and tent/trapeze dress - all with sizeable year-over-year increases. Casual column styles in midi and maxi lengths are seen in leather, sweater knits, and heavyweight wovens, and hold 7 percent of the assortment. The shirt dress continues to gain share with a 75 percent increase at 7 percent of the overall dress mix. Skirts, meanwhile, have decreased year-over-year by 14 percent to now hold 12 percent of the assortment, continuing to support the shift towards dresses and away from separates.

### OVERALL PRODUCT SHARE



Data source: WGSN Catwalk Analytics

### YEAR-ON-YEAR COMPARISON PF '15-PF '16





### CROPPED STYLES LEAD IN TROUSERS AND SKINNY JEANS

**T**rousers hold second position within the overall product assortment at 14 percent, an 8 percent year-over-year increase. A telling 35 percent of all trousers are cropped, a 17 percent year-over-year increase. Cropped trousers include styles such as the wide leg, flare, and bootcut. Of the total percentage of wide-leg styles 27 percent are cropped, 14 percent of flares are cropped, and 22 percent of bootcut trousers are cropped, all holding sizeable options within their categories.

In the denim category, the skinny jean has shown an increase for the first time in a few seasons to 26 percent of the jean mix, a 24 percent year-over-year increase. Cropped styles lead the skinny category at 39 percent, while straight legs follow with 30 percent. Both the flare and the wide leg have faded significantly, falling by 50 percent and 8 percent respectively against SS'16.

### POLONECK SWEATERS CONTINUE TO HOLD THE NUMBER ONE SPOT IN KNITWEAR

**S**waters were a strong element in the collection and hold 8 percent of the overall product assortment with the poloneck having the number one spot with 21 percent of styles, a 24 percent year-over-year increase. The oversized/long tunic styles are more prevalent this season with 14 percent of sweaters, a 40 percent increase. Ribbed is the most popular stitch, holding 16 percent of the category. Heathered and mohair knits hold 9 percent of sweaters and both have significant year-over-year increases. All-over print/pattern holds 25 percent of the sweaters for Pre-Fall '16 in a range of playful patterns.

### TOPCOATS DOMINATE THE COAT CATEGORY

**F**inally, coats continued to lead the outerwear category with 12 percent, while jackets fall to 10 percent, a 9 percent year-over-year decrease. Continuing from SS'16 as a popular silhouette, the overcoat/topcoat holds the highest share of the coat category at 33 percent. Military and safari styles have also dramatically increased by 600 percent to hold 14 percent of product share. This look dipped in the past few seasons but has seen a resurgence in line with utility details in the contemporary skinheads theme for the young women's market.



FOR MORE INFORMATION ON THE OVERALL PRODUCT DISTRIBUTION, FABRIC, DETAILS AND PRINT AND PATTERN TRENDS FOR THE SEASON, VISIT [WWW.WGSN.COM](http://WWW.WGSN.COM)



Courtesy: Lifestyle



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### Factory

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# 10 years of making everyday fashionable

Max completes a decade of international fashion in India



## max

Max, the Landmark Group-owned international-fashion-brand, is on a speedy expansion path. It plans to open at least one store every two weeks for the next three years, expand its presence both in metros as well as tier II cities, as well as to tap the booming e-commerce market with the group-led online platform. Call that Max growth!

When Max Fashion Retail was conceptualised way back in 2005 the mid-market consumer segment was already almost 40 per cent of the total apparel market. Today, while the mid-market is growing at 12 per cent year-on-year, Max brand is recording growth which is triple the segment average. The mid-market consumer segment is today valued at between ₹70,000 to ₹80,000 crore and it will continue to be the fastest growing segment for the next 10 years simply because it is now driven by organised retail players.

Max Fashion is today growing at more than 35 per cent and has clocked ₹1,850 crore for this year. It entered India a decade ago and has about 135 stores in 50 cities. The brand strategy to focus on value-fashion customer and mid-segment families and is religiously implemented by launching products between the ranges of ₹200 to ₹700.



“SINCE OUR LAUNCH, WE HAVE BEEN GROWING ON 38 PER CENT CAGR ANNUALLY. WHILE THE WHOLE SEGMENT WOULD BE GROWING AT 12 PER CENT PER ANNUM, WE ARE GROWING TRIPLE THE SEGMENT AVERAGE

”

– Vasanth Kumar,  
Executive Director, Max Retail Division

### → More brick-n-mortar empowerment

With an aggressive store expansion plan underway, Max is looking to add another 10 cities from its current 55 cities to its fold by 2018. The top seven metros currently contribute to a total of two-thirds of Max's business. This is also where the GDP growth is the highest because it is led by young aspiring middle class; the white-collared, service and IT industry professionals. The company is focused on the mid- to upper-mid sections in metros/minimetros and considers its customer base as service-industry employed customers. “Currently, we have 135 stores in India and we are adding one store every 10 days, which means 35-40 stores each year. We will add 120 stores in the next three years,” shared Kumar.

### → Riding on e-commerce and omni-channel Initiatives

There is a significant shift in the customer expectations and behavior thanks to e-commerce. Today, customers value convenience more and they also want the brands to deliver better fashion, better quality and better service. Max has upped its offering through the online channel of the group company – [www.landmarkshops.in](http://www.landmarkshops.in) – which is live from January 2016.



Max stores, which are already connected internally through inventory-sharing across its brick & mortar stores, are also improving their product availability to lessen non-satisfied customers. "If any particular product is not available at the store we have the ability to service the demand through some other store," shared Kumar.

The transactions undertaken by millennial generation today, which is the core of our brand, are digital in nature. Connecting with bloggers, using social media is the need of the hour, as much as it is partnering with the traditional media to leverage their digital initiatives," suggested Kumar. There are two parts of everything today, be it TV, magazine or retailing: offline and online. In that sense, a brand going online is a natural progression. "We are enabling our top 30 stores with wi-fi; the tablets placed there will enable the customer to scan through the entire range available. In the value fashion segment, Max is already the largest mono-brand. The advantage we have over most other retail formats is that they are multi-brands whereas we are the only large format mono-brand in India. And it makes it easier for the customer to interact with us because they have to communicate with one entity: Max, whether it is a product, store or the website," Kumar asserts.



#### → Leveraging on loyalty programs

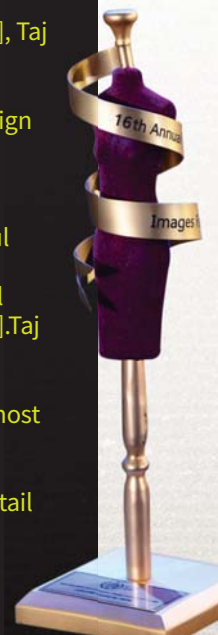
The brand Max has a customer base of 5 million. Also Landmark Rewards Program has another 5 million customers in their data base. This makes it a total of 10 million customers that the group can leverage through loyalty schemes. "We have now started to integrate the platforms with the Landmark Group companies, we will float the customer loyalty online, which means very soon the customers can burn the points earned while transacting online. They can also know the latest trends, the store networks, can locate stores by using them, etc.," he shares.

#### → Retail store at the heart of the experience

"The reason for our existence is store experience, without which we wouldn't live as a brand one single day. For a hardcore brick-and-mortar retailer like us, the focus is always been creating a retail store experience and we continue to reinforce that image of ours. We keep our retail stores as a place where we make our retail leadership visible. We complement it through our digital online and omni-channel initiatives. The prime piece of action for us is retail space. Because that is where we can engage with the customer, can connect with them and understand their needs in one shot. Even if you see the trends abroad, where e-commerce started 20 years ago, more than 90 per cent of the business in fashion either happens in the store or happens by enabling the web along with the store which we call that web-enabled offline sales. The physical stores is the main piece of action. From launching new collection to bloggers meet, everything for us happens on the floor. We give our digital customer enough reason to visit the store and see what we actually are. But obviously, in the end, allow the customer to choose whatever channel he or she wants" sums up Kumar.

## Awards & Accolades 2015 - 16

- "Images most admired fashion retailer of the year large format store chain" by Image Retail Awards held In Mumbai, March 2016
- "Asia's most promising brand" in Bangkok by WCRC- World consulting and research corporation, Bangkok, March 2016
- "12th Best Workplace in Asia" by Great Places to Work Institute in Sydney, Australia, March 2016
- "3rd Best Retail Company to work for in India for 2016", by Great Places to Work Institute in association with Retails Association of India. This is the 3rd year in a row we have been recognized as one of the Top 3 companies to work for in retail, February 2016
- "Retailer of the year-fashion & lifestyle" by Retail Excellence Awards [CMO], Taj Lands, Mumbai 2016
- "Retail marketing campaign of the year", "Customer Loyalty Program Award", "Effective Retail through Supply chain", "Impactful Retail Design & Visual Merchandising" by Retail Excellence Awards [CMO].Taj Lands, Mumbai, 2016
- JURY Award for Images most admired fashion retailer of the year- Marketing & Promotions by Image Retail Awards held In Mumbai March, 2016



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# PUT YOUR FASHIONABLE FOOT FORWARD **AS BIG DATA MEETS FASHION**

-By Sunil Jose

The retail sector in India is emerging as one of the largest sectors in the economy and is currently valued at US\$ 600 billion. Of this, about 90 percent is unorganised retail and only 10 percent is organised. However, the balance seems to be increasingly tilting towards the organised space. In fact, a recent study by Google stated that by 2020, India is expected to generate USD 100 billion online retail revenue out of which USD 35 billion will be through fashion e-commerce. Liberalisation of the FDI policy in retail sector will also provide further impetus to the entry of large international retailers, especially in the category of fashion and apparel.

## THE INDIAN FASHION SCENARIO

The fashion industry in India is rapidly evolving with a constant blur of new and enviable trends, patterns, designs and colours. Today, with millennials being the primary target market, these trends emerge and subside with mind boggling speed and preferences patterns change in the blink of an eye. Keeping up with these trends and being able to predict customer demand is the key prerequisite






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***Big Data is all about turning extremely large quantities of data into useful information. When companies aggregate data and analyse them effectively, patterns emerge, ideas are born, and fashion companies become trend setters.***

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for fashion companies to thrive today. For years, fashion companies have had previous data and intuition at its disposal to predict customer demands, which is now however, becoming irrelevant considering the fast-changing fashion trends and the tough competition in the market. More so, with more and more people getting brand conscious, it is becoming tougher for fashion companies to predict fashion trends on a real time basis. This is where Big Data steps in to save the day.

#### **TREND FORECASTING WITH BIG DATA**

In true fashion industry style, bloggers and media alike have coined a different term for big data meeting fashion – “trend forecasting” is the term Wall Street Journal contributor Kathy Gordon used to describe

this information analysis. Big Data is all about turning extremely large quantities of data into useful information. When companies aggregate data and analyse them effectively, patterns emerge, ideas are born, and fashion companies become trend setters. In an industry where the success of next season’s collection hinges on picking the right patterns, colours, fabrics, shapes and sizes, Big Data is a big deal. Fashion companies and retailers can leverage Big Data analytics to quickly understand which trends are gaining momentum and which ones are losing ground at any point in the product’s lifecycle. With that insight, they can make smart adjustments to designs, production and marketing before launching a new collection, reducing the risk that the line



Bloomua / Shutterstock.com



won't sell. Additionally, companies also optimise their supply chains as they can now decide what to produce more and should be stocked in inventory and what can be kept for made-to-order or what is needed immediately.

### BIG DATA AS A CUSTOMER BEHAVIOUR TOOL

Fashion companies today, understand that the more data they collect and analyse on the basis of their interactions and engagements with customers, more will the individual preferences become easier to predict, in a more comprehensive and detailed way than ever before. This will, in turn, provide valuable insights for the fashion industry, from what products

might perform best, in general, down to what will likely sell well in which store locations, what products are successful when placed next to each other and how to optimise retail experiences. Big data is extremely useful in a marketing capacity, using information like customer demographics and spending habits, in terms of how much they spend, on what and where. Data analytics helps the companies understand what their customers are looking for, on the basis of their search history, previous purchases and buying patterns and analyses trends arising from it. This is what helps companies stay ahead of competition – the ability to analyse and make actionable information and trends from the data collected.

### TAPPING SOCIAL MEDIA WITH BIG DATA

As difficult it is to believe, Big Data is gradually becoming an integral appendage of one of the most intuition-based and unpredictable industry. In a universe where outfits and trends become dated with the launch or release of the next big thing, even top fashion companies like Prada, Gucci, Burberry, Chanel, Ralph Lauren and the rest of the bandwagon are relying heavily on Big Data Analytics and related technologies. In fact, designers and fashion companies often share photographs of their exclusive collections on Social Media (Facebook, Twitter, Instagram, Pinterest), which help them understand the trends and people's response much before the curtain-raiser.

Sentiment analysis through collection of the responses (likes, shares, comments, re-tweets) helps the industry analyse every aspect of consumers demand—from the most loved colour to the most acceptable fit.

### E-COMMERCE AND BIG DATA

With venture capitalists backing e-commerce platforms, the importance of the companies being profitable is heightened even further. Revenue generation and in turn increasing profitability is the key focus of e-commerce companies and this is where big data analytics steps in to save the day. Understanding customer preference, predicting customer demand and targeting customers through their chosen medium is possible through the undeniable contribution of big data analytics. Fashion companies, in order to stay ahead of the curve, are increasingly looking at not only adopting data analytics and related technologies but also implementing across departments to generate results for real time predictions and results.

With the liberalisation of the FDI policies, increasing demand for e-commerce and the dizzying pace of changing trends in the market place, fashion companies need to up their game to stay ahead in the race. Without a doubt, Big Data is starting to make a big impact on fashion, and more is yet to come. While the adoption is taking place slowly but gradually, it is the real time implementation and the customer experience which is the true differentiator. The brands and companies who can extract most wisdom from customer data and react to it most effectively, will ultimately emerge as the winner.



### ABOUT THE AUTHOR

#### Sunil Jose, MD, Teradata India

Sunil Jose joined Teradata in June 2014, bringing with him more than 25 years of technology industry leadership experience that encompasses enterprise software & hardware knowledge, general management, strategy development and executive management experience. Jose is also a member of the advisory board of @Talview.com. At Teradata, he is responsible for providing leadership and overall strategic direction to the company's India business overseeing field operations including sales, customer management, marketing, consulting, professional services and support. Before joining Teradata, he was Vice President at Oracle managing its applications & cloud business operations. He started his career with HCL in 1990 and moved on to work in various geographies which included the Middle East.



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# THE EPICENTERS OF FASHION RETAIL IN INDIA

A KNIGHT FRANK EXCLUSIVE RESEARCH

India is one of the important retail markets for global retailers with Mumbai, NCR and Bengaluru being the epicenters of this focus. Almost 400 international brands are already present in India and the next wave of brands vying the country are considering these three locations in the first wave. The article contains excerpts from the Knight Frank research "Think India. Think Retail 2016" compiled with relevance to fashion retailers in India.

India's retail sector has been undergoing structural changes for the last two decades. Shopping malls, lined with specialty retailers, started dotting the retail markets of the country's top cities during the mid 90s. Since then, the "mall culture" gradually pervaded the population, especially in the metros and mini metros, heralding the beginning of the modern retail movement in India.

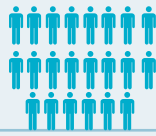
Presently, the modern retail penetration in India is abysmally low compared to the developed and emerging economies. While the share of modern retail is 84 percent, 71 percent and 53 percent in the US, Singapore and Malaysia, it is only 19 percent of the value of the total retail spending in the National Capital Region, Mumbai, Kolkata, Chennai, Bengaluru, Pune and Hyderabad cumulatively. In fact, the degree of penetration in the whole of India would be even lower since the presence of modern retail in smaller cities and rural areas is not significant.

Against this backdrop, this study discusses the various trends emerging in India's retail sector, present market size and future potential of Mumbai Metropolitan Region (MMR), National Capital Region (NCR) and Bengaluru with special focus on fashion retail. The study has been limited to the aforementioned three locations as they account for 69 percent of the total retail spending of the top seven cities taken together.

Defining modern retail has always been an ambiguous exercise, and, for the purpose of this study, all stores in a mall have been considered as modern retail constituents. In the case of retail stores on shopping streets, stores that provide a purchase invoice and have a basic structure and air conditioning have been considered as modern retail.

## MARKET SIZE

### POPULATION 2015 (E) (MN)


**MMR**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

22

24

10

93

### TOTAL CONSUMPTION EXPENDITURE 2015 (₹BN)


**MUMBAI**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

4,113

3,494

2,020

12,782

### PER CAPITA CONSUMPTION EXPENDITURE 2015 (₹)


**MUMBAI**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

188,745

138,335

212,444

137,758

### TOTAL RETAIL EXPENDITURE 2015 (₹BN)


**MUMBAI**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

1,214

1,047

640

4,206

### PER CAPITA RETAIL EXPENDITURE 2015 (₹)


**MUMBAI**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

55,714

44,055

67,289

45,328

### TOTAL MODERN RETAIL EXPENDITURE 2015 (₹BN)


**MUMBAI**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

164

269

154

801

### PER CAPITA MODERN RETAIL EXPENDITURE 2015 (₹)


**MUMBAI**
**NCR**
**BENGALURU**
**TOTAL URBAN CENTRES**

7,519

11,290

16,191

8,635



"We believe that the modern retail segment in India will be driven by e-tailing as well as the brick and mortar modern retail format through an integrated process."

-BS Nagesh, TRRAIN.



"We look forward to the government fascinating retail growth in India with suitable policies and required infrastructure."

-Kishore Bhatija,  
MD, Real Estate Development,  
K. Raheja Group.

Source: Knight Frank Research, Indicus Analytics, NSSO  
\*MMR, NCR, Bengaluru, Hyderabad, Pune, Chennai, Kolkata



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## PRODUCT CATEGORY-LEVEL ANALYSIS APPAREL

### MARKET SIZE AND MODERN RETAIL POTENTIAL ACROSS ZONES

2015	Central Bengaluru	East Bengaluru	North Bengaluru	South Bengaluru	West Bengaluru	ORR	Bengaluru
Retail size (₹bn)	1.7	2.3	6.1	5.4	12.3	0.8	28.8
Modern retail market size (₹bn)	0.4	1.6	0.4	1.0	2.0	*	5.5
Modern retail potential (₹bn)	1.2	0.6	5.7	4.3	10.3	0.8	23.2
Retail Market size (₹bn)	3.7	4.9	5.0	11.5	10.9	5.3	41.4
Modern retail market size (₹bn)	1.2	4.8	0.5	3.0	3.5	0.9	14.0
Modern retail potential (₹bn)	2.5	0.1	4.4	8.4	6.5	0.8	23.0
Overall apparel potential retail Potential (₹bn)	3.7	0.7	10.2	12.8	16.9	1.7	46.2

Source: Knight Frank Research, Indicus Analytics, NSSO

## BENGALURU

Bengaluru has emerged as a sought-after retail market in recent years, with several foreign and national brands setting up their stores in the city. The city houses large-format retail malls, targeting both the luxury segment and value shoppers, while providing for modern retail space in shopping streets as well.

Fueled by the advent of the IT/ITeS sector, which witnessed the proliferation of a large number of people from other regions, Bengaluru is the third most populous city of India today, supporting a diverse demography.

During the last decade (2001-2011), the population growth was observed to have been significant, at a decadal growth rate of 33 percent, which was substantially higher than the growth witnessed in the Mumbai Metropolitan Region (MMR).

With an estimated population of 10 million as of 2015, a sizeable 54 percent of the city's population comprises households earning above ₹300,000 per annum, thereby translating into 5.2 million people that plays a major role in Bengaluru's modern retail growth story

The Bengaluru retail market is characterised by a fair distribution of modern retail, largely impacted by rising consumer income levels. We have sized the city's customer spending to get an understanding of the total consumption expenditure pattern.

A key observation in this regard is the city's higher per capita consumption expenditure. With a growing population base, the total consumption expenditure in Bengaluru is on the heels of NCR and Mumbai, and stands at ₹2,020 billion – a 16 percent share of the top seven urban centres.

The present market size of modern retail in the city stands at ₹154 billion, behind NCR and Mumbai, denoting the substantially low penetration of modern retail in the region (24 percent), as compared to many cities in emerging economies. This low penetration of modern retail portends well for Bengaluru, as it holds immense potential to increase its share of modern retail in the forthcoming years. The potential of modern retail in Bengaluru stands at an estimated ₹486 billion.

While the city's total modern retail expenditure stood behind Mumbai and NCR, its per capita modern retail expenditure surpassed these two cities considerably, by a margin of 115 percent and 88 percent, respectively. Its per capita retail expenditure stands at ₹67,289.

Between 2015 and 2019, the modern retail market size in Bengaluru is expected to grow at a CAGR of 23 percent, from ₹154 billion in 2015 to more than ₹363 billion in 2019. Further improvement in the macroeconomic parameters, a fast-growing cosmopolitan populace characterised by double incomes, high purchasing power and discerning tastes, and exposure to evolving trends are expected to enhance the share of Bengaluru's modern retail.

We have estimated that by the year 2026, modern retail penetration in Bengaluru will increase to 50 percent from the current 24 percent, with both brick and mortar and e-tail formats contributing significantly to the growth. Total potential of modern retail in Bengaluru stands at an estimated ₹486 billion.

Bengaluru has a strong apparel market, dominated largely by traditional shopping streets, with the modern retail

potential in the overall, apparel category estimated at ₹46 bn. The ratio of shopping streets is higher in the city, particularly in regions such as South and West Bengaluru. These regions, though substantiated with malls, have numerous shopping streets adjacent to heavily-populated residential areas. This denotes the lower modern retail market size in 2015.

The northern region, too, has a minimal modern retail presence, owing to its nascent retail markets and dependence on shopping streets. On the other hand, East Bengaluru, which has a number of large-format malls located in Whitefield, accounted for the highest modern retail market size in both, the ethnic and non-ethnic apparel categories. Owing to the current low modern retail presence, North, South and West Bengaluru have a high growth potential in the apparel category. Together, these zones have an annual potential of ₹40 billion.

#### MODERN RETAIL SPACE SCENARIO IN MALLS

Bengaluru has witnessed a relatively gradual and lower concentration of malls compared to NCR, and Mumbai. Mall development, which commenced in the central and off-central, locations of the city, has now spread to the peripheral locations as well. At present, Bengaluru has 26 malls, adding up to approximately 9.3 million sq.ft. of modern retail space.

North Bengaluru has the least occupied mall space per thousand of its population. This can be attributed to the fact that modern retail in this zone is largely nascent and comprises traditional retail, with modern retail penetration at 14 percent of the ₹93 billion total retail expenditure in the zone.

East Bengaluru remains the region with the highest amount of per capita occupied mall space per thousand of its population with a whopping 1,711 sq. ft. On the other hand, despite accounting for the largest quantum of mall space in the city, West Bengaluru has a lower per capita occupied mall space, at 430 sq. ft.

>

#### Key Takeaways

- Bengaluru has the highest per capita annual modern retail expenditure, at ₹16,191, across all seven urban centres.
- Growing at a CAGR of 16 percent, Bengaluru's total retail spending is projected to increase from ₹640 billion in 2015 to ₹1,155 billion in 2019.
- Modern retail penetration is set to increase from the current 24 percent to 50 percent by 2026
- The estimated annual modern retail potential in apparel in Bengaluru is ₹46 billion.





## MUMBAI METROPOLITAN AREA

With a population base of 22 million, the MMR is one of the biggest urban agglomerations in India. During 2001-2011, the population increased at decadal growth rate of 24 percent, which is a tad lower than the growth observed in top urban centres of the country. Nevertheless, Mumbai remains the financial capital of the country and is the hub for banking, financial services and insurance (BFSI) companies in India. The sheer size of the region in terms of population and its socio-economic profile make it one of the most important retail markets in the country. Nearly 57 percent of the city's population comprises households earning above ₹300,000 per annum.

Mumbai is often projected as one of the most expensive cities in India. The MMR region has the highest consumption expenditure in the country, and stands at ₹4,113 billion — a 32 percent share of the top seven urban centres. In terms of volume, it is nearly double of Bengaluru's consumption expenditure. The MMR also leads in terms of total retail expenditure.

### PRODUCT CATEGORY-LEVEL ANALYSIS

#### APPAREL

##### MARKET SIZE AND MODERN RETAIL POTENTIAL ACROSS ZONES

2015	Andheri Borivali	Bandra Vite Parle	Central Suburbs	Island city	Navi Mumbai	Peripheral Western Suburbs	Thane & Paripheral	MMR
Retail Market size (₹bn)	9.5	2.6	6.8	7.6	2.5	4.9	5.4	39.3
Modern retail market size (₹bn)	4.1	2.3	1.4	1.9	1.4	0.7	3.0	14.8
Modern retail potential(₹bn)	5.4	0.3	5.4	5.8	1.1	4.2	2.5	24.6
Retail Market size (₹bn)	25.7	7.0	18.5	20.7	6.7	13.1	14.7	106.3
Modern retail market size (₹bn)	9.9	4.4	4.7	4.0	4.0	1.8	4.5	33.3
Modern retail potential(₹bn)	15.8	2.6	13.8	16.7	2.6	11.4	10.2	73.0
Overall apparel Modern retail Potential(₹bn)	21.1	2.8	19.1	22.4	3.6	15.5	12.7	97.6

Source: Knight Frank Research, Indicus Analytics, NSSO



At ₹1,214 billion, the region contributes to nearly 29 percent of the total retail expenditure in the top seven urban centres of the country. Such high retail expenditure is a big opportunity for retailers, and is one of the reasons why many international brands prefer to open their stores in the MMR. Despite having the highest retail expenditure, the Mumbai market lags behind NCR in terms of modern retail penetration. The MMR's modern retail market size stands at ₹164 billion. Even today, Mumbai has a number of non-modern shopping streets. Quite a high volume of retail spending takes place in these traditional shopping areas. Likewise, the per capita modern retail spending in the MMR is far below that of Bengaluru and NCR.

The penetration of modern retail is extremely low in the MMR, primarily due to the haphazard and unorganised retail markets across the city. Some of the biggest shopping areas in the MMR, such as Crawford Market, Zaveri Bazaar, Hindmata Market, Lamington Road, Kalamboli Market, Linking Road, etc., are still non-modern, unlike NCR and Bengaluru, where shopping streets are transforming into modern retail destinations.

The present market size of modern retail in the MMR stands at ₹164 billion, indicating a substantially low penetration of modern retail in the region (13.5 percent), compared to many cities in emerging economies. At the same time, the retail expenditure of the MMR, at ₹1,214 billion, showcases the region's potential for modern retail in the coming years. The potential of modern retail in the MMR stands at an estimated ₹1,050 bn. Between 2015 and 2019, the modern retail market size in the MMR is expected to grow at a CAGR of 23 percent, from ₹64 billion in 2015 to more than ₹381 billion in 2019.

We have estimated that by the year 2036, modern retail penetration in the MMR will increase to 50 percent from the current 13.5 percent with both brick and mortar and e-tail formats contributing significantly to the growth. The penetration of modern retail is the highest in the apparel product

category across all the top three retail markets of the MMR, NCR and Bengaluru, primarily due to the presence of a number of national and international brands in this category. At the same time, most of the unorganised shopping streets in MMR have apparel and footwear as their major offering. Linking Road, Colaba Causeway and Hindmata Market in Dadar are some of the shopping streets that predominantly sell apparel, footwear and accessories.

The annual modern retail potential in the overall apparel category is estimated to be ₹98 billion. The island city zone has the highest potential for the apparel category, mainly due to the limited number of malls and modern shopping streets in MMR. Despite a strong customer base, the zone lacks modern retail supply. High real estate cost in the zone is also one of the reasons for the limited modern retail development. On the other hand, despite having a number of malls, the Andheri-Borivali zone has a huge annual potential of ₹21.2 billion for modern retail in the apparel category. The modern retail potential is higher in the non ethnic category across all zones in the MMR.

#### MODERN RETAIL SPACE SCENARIO IN MALLS

As of December 2015, the MMR had 33 operational malls. While the MMR ranks second in the country in terms of total mall space, it lags when compared to population density. The occupied mall space in the MMR per thousand of its population stands at 350 sq. ft. A comparison of the zones within the MMR indicates that at 723 sq. ft., Navi Mumbai has the highest mall space density. The Bandra-Vile Perle zone has no malls. Consumers in this zone are either dependent on shopping streets located within the zone or malls in other zones. Andheri - Borivali and the Central suburbs have a relatively higher per capita mall space per thousand of their population compared to overall MMR. The availability of large land parcels at decent prices has facilitated mall development in the region. The retail expenditure in these zones is also quite high, which contributes to the feasibility of malls in these locations.

#### MODERN RETAIL SPACE SCENARIO IN MALLS

- The MMR has the second largest customer base for retail across all seven urban centres, making it an ideal market for retail development
- At ₹1,050 billion, the MMR has the highest potential for modern retail in the country.
- Growing at a CAGR of 16 percent, the MMR's total retail spending is projected to increase from ₹1,214 billion in 2015 to ₹2,243 billion in 2019.
- Modern retail penetration is set to increase from the current 13.5 percent to 50 percent by 2036.





#### KEY TAKEAWAYS

- NCR has the largest customer base for retail across all seven urban centres.
- Growing at a CAGR of 16 percent, NCR's total retail spending is projected to increase from ₹1,047 billion in 2015 to ₹1,919 billion in 2019
- NCR has a potential for modern retail, making it second only to Mumbai.
- NCR has a potential for ₹779 billion modern retail, making it second only to Mumbai, which has a potential of ₹1,050 billion.
- Modern retail penetration is set to increase from current 26 percent to 50 percent by 2028.
- Annual modern retail potential for spending on apparel in NCR is pegged at ₹19 billion.

## NCR

The NCR is one of the major retail hubs in the country. The market's prominence emerges from its diversity in demography and lifestyle, which has had a huge impact on shaping its retail business. It's growth was fuelled majorly by the growth in the service industry, which opened up vast job opportunities in the region, leading to huge immigration from its neighbouring states. Among the top three cities, the NCR has experienced the highest decadal growth of 47 percent between 2001 and 2011, and is estimated to have a population of 24 million as of 2015. A substantial 48 percent of the city's population comprises households earning above ₹3,00,000 per annum. An estimated 11.4 million people have made the maximum contribution to NCR's modern retail market.

Propelled by surging household incomes and other socio-economic factors, consumer spending is increasing at a faster pace. Despite a larger population base, the total consumption expenditure in NCR is less than Mumbai and stands at ₹3,494 billion — a 31 percent share of the top seven urban centres. NCR is a close second to Mumbai in the total retail expenditure as well. Together, both cities account for more than 59 percent of the retail consumption pie of the top seven cities. However, the NCR surpasses Mumbai and Bengaluru in the total modern retail expenditure. Of the total ₹801 billion modern retail expenditure of the top seven cities, an approximate 34 percent share is taken up by the NCR. It's modern retail market size stands at ₹269 billion. The NCR's per capita modern retail expenditure is substantially lower than Bengaluru.

## PRODUCT CATEGORY-LEVEL ANALYSIS

### APPAREL

#### MARKET SIZE AND MODERN RETAIL POTENTIAL ACROSS ZONES

2015	Delhi Central	Delhi East	Delhi North	Delhi South	Delhi West	Faridabad	Ghaziabad	Greater Noida	Gurgaon	Noida	NCR
Retail market size (₹bn)	3	7	10	10	7	3	2	0.3	4	1	49
Modern retail market size (₹bn)	11.1	1.0	4.9	15.1	4.8	0.8	1.7	0.1	4.0	1.2	45.1
Modern retail potential (₹bn)	***	6.1	5.5	***	1.8	2.4	0.5	0.2	***	0.0	2.6
Retail market size (₹bn)	4.4	11.5	16.9	15.5	10.9	5.3	3.7	0.6	6.6	2.1	77.9
Modern retail market size (₹bn)	12.1	1.5	6.1	16.4	6.3	2.1	3.6	0.6	10.0	2.9	61.9
Modern retail potential (₹bn)	***	10.0	10.8	***	4.5	3.1	0.05	0.03	***	***	15.9
Overall apparel Modern retail Potential (₹bn)	***	16.1	16.3	***	6.4	5.6	0.6	0.2	***	***	18.6

Source: Knight Frank Research, Indicus Analytics, NSSO

\*\*\*Implies that the modern retail space in these zones has been generating more business than the total retail spending of the catchment population in this product category

Approximately 59 percent of the modern retail stores in NCR are on shopping streets and the rest, in malls. However, due to restricted store sizes, the space occupied by modern retail stores in malls is much more, taking up 57 percent of NCR's total modern retail space. The total consumption expenditure (which includes rent, transportation, utilities, education, medical and insurance) in NCR stands at ₹3,494 billion, of which ₹1,047 billion comprises the total retail expenditure. The present market size of modern retail stands at ₹269 billion. Since the penetration of modern retail in the NCR is substantially low (26 percent) as compared to many cities in emerging economies, it has a huge potential to increase its share of modern retail in the total retail market of the city. The potential of modern retail in the NCR stands at ₹779 billion.

Between 2015 and 2019, the modern retail market size in NCR is expected to grow at a CAGR of 24 percent, from ₹269 billion in 2015 to more than ₹630 billion in 2019. The growth in the macroeconomic parameters, a fast growing middle class with increasing disposable income and a population

that is steadily moving into the peripheral markets of Gurgaon, Noida, Ghaziabad and Faridabad are expected to enhance the share of NCR's modern retail. We have estimated that by the year 2028, modern retail penetration in the NCR will increase to 50 percent from the current 26 percent with both brick and mortar and e-retail formats contributing significantly to the growth.

The annual modern retail potential in the overall apparel category is estimated to be ₹19 billion. The service industry and growth in income have attracted brands and retailers that have set up modern stores in the region, which explains the high penetration of modern retail in this product category. In addition to its own population base, Central Delhi, which mainly comprises Connaught Place, Janpath, Chandni Chowk and Karol Bagh, caters to consumers from NCR's other zones in terms of apparel purchase. Similarly, due to their strong consumer base, South Delhi, Gurgaon and Noida have some of the best malls and stores in the entire NCR, which not only attract their own catchment but also benefit from expenditure from other zones.






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## MODERN RETAIL POTENTIAL A SNAPSHOT

	Annual Potential (₹bn)	Highest Potential Zone
<b>APPAREL</b>		
 MMR	97.6	Island city
NCR	18.6	Delhi North
Bengaluru	46.2	West Bengaluru
<b>ETHNIC</b>		
 MMR	24.6	Island city
NCR	2.6	Delhi East
Bengaluru	23.2	West Bengaluru
<b>NON ETHNIC</b>		
 MMR	73.0	Island city
NCR	15.9	Delhi North
Bengaluru	23.0	South Bengaluru

On the other hand, there is a high growth potential for the apparel category in North and East Delhi. Together, these zones have an annual potential of ₹32 billion. In general, the modern retail potential is higher in the non-ethnic category than the ethnic category.

### MODERN RETAIL SPACE SCENARIO IN MALLS

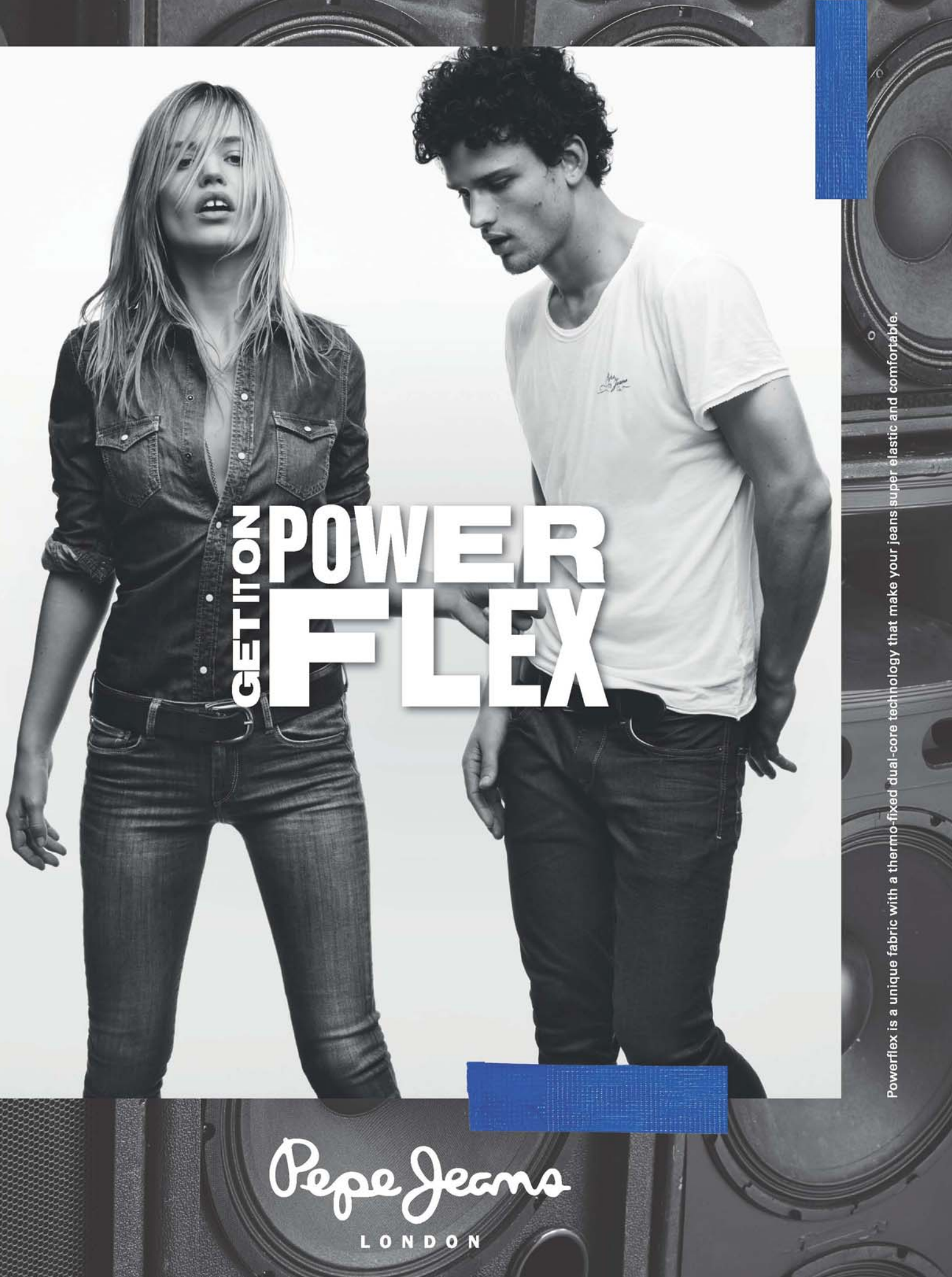
North Delhi has the least occupied mall space per thousand of its population. This can be attributed to the fact that retail in this zone largely comprises traditional retail, with modern retail penetration only at 7 percent of the ₹228 billion total retail expenditure in the zone

In Greater Noida, the per capita mall space per thousand of the population is also quite low. This can be explained by the fact that total modern retail expenditure in Greater Noida is very limited. From the ₹8 billion total retail expenditure, only 1 billion goes towards modern retail. Malls in Faridabad are concentrated on Mathura Road, and its occupied mall space is concentrated mainly in three malls. The ongoing construction on Mathura Road and the metro work has adversely affected retail in this zone. Gurgaon and Noida have the highest per capita mall space per thousand of their population. Unlike other zones, Gurgaon and Noida are characterised by the availability of large land parcels that facilitate large-format malls. The Great India Place and DLF Mall of India in Noida, and Ambience Mall in Gurgaon are examples of large-size malls in NCR.

### CONCLUSION

The Indian retail market witnessed an enormous change in the last few years. Evolving consumer spending patterns and increasing disposable income levels are redefining the country's retail landscape. There is ample dynamism at present. With a number of international brands entering the market. The existing brands are also working towards reinventing ways to keep up with the pace of growth in the sector. Currently, the total retail spending in the top seven retail markets of the country amounts to ₹4,172 billion (\$62 billion) and this is projected to reach ₹8,762 billion (\$132 billion) by 2020. Going forward, a substantial portion of this retail spending will continue to take place in the non-modern retail segment as well. The penetration of modern retail will also witness a substantial rise from the current 19 percent to 24 percent in the next five years in the top seven retail markets.





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– Mohini Binepal, Co-Founder and Retail Head, Ruosh

# RUOSH

## IT'S ALL ABOUT THE EXPERIENCE

Competing with online retailers, off line stores like Ruosh have crossed boundaries when it comes to making the consumer experience the backbone of the store. **MOHINI BINEPAL, CO-FOUNDER AND RETAIL HEAD, RUOSH (SARA SOULE PVT. LTD.)**, talks to IMAGES BoF about the brand's meticulous methods for retaining an unforgettable consumer experience.

### THE IN-STORE JOURNEY

For customer acquisition and retention, brands often use both 'service' and 'convenience' as a differentiator against competing brands. 'Service' and 'convenience' are elements of 'experience,'" Mohini Binepal, Co-Founder and Retail Head at Ruosh, explains. Ruosh has grown three times since the last financial year. At a time when young consumers find convenience in online shopping, offline retailers are prepping up their sales tactics. The off store consumer experience has become a crucial aspect to satisfying and bringing back shoppers.

Off-store brands like Ruosh, have a dedicated team who provide training and a customer experience department that empowers their sales team with skills on consultative selling. The sales team is trained to take a consumer through a journey the moment they walk into the store. The walk through, covers a panel that narrates the unique craftsmanship that goes into the brand which includes 250 steps and painstaking processes through which a good quality shoe is made.

"We then move to understanding the consumer's footwear requirement using a Need Assessment Form," said Binepal. According to Binepal, the Need Assessment Form answers 4 questions based on multiple choices and when helps customers to select the ideal footwear category from the wide range of work, casual, club, occasion and wedding ranges. 'Visual aids' are also provided to convince customers while they match the Ruosh shoes with a trouser swatch book.

### PERFECTING THE AFTER SALES EXPERIENCE

Determined to keep the consumer experience extended in their after sales, Ruosh has even made the complaints and products exchanges hassle free. The retail store





keeps data of the consumer's billings and purchase details to avoid any hassle in case of product exchanges or manufacturing defects. As part of the store mandate, the sales team also provide pointers on how to care for the products. All processes are measured through the brand's weekly sole audits and monthly mystery audit checks. Binopal pointed out that the customer service has brought in tremendous results where customer loyalty has brought in a repeat rate of 36 percent and word of mouth increased by 22 percent.

#### THE PHYSICAL STORE ELEMENTS

Stating that 'now' is the reality of people's lives today, Ruosh stores are located at prime high streets or malls and present in large format as well as multi-brand outlets which the brand plans to double by the end of this year.

The feel and look of the store have also taken a major change in the recent years. Stores have become more conceptualised and exclusive in offerings. The physical store element, which is the design, layout and display, which really brings out the accessibility of the products are paramount.

Ruosh has only 'open store concepts' for the stores located in shopping malls. According to Binopal, the store design is more linear which really facilitates customer movement. Even the shoe displays are done based on the category break up helping consumers select the right product.

**"We have recently introduced our new shop in shop concept which is specifically designed for large format store and the display has increased foot-fall and sales by 30 percent and 40 percent respectively,"** says Binopal. "In a multiple brand outlet, if your product is not displayed at an eye level, chances are that your product will be

missed. Our endeavour, with our partners is to help aid them with VM and sales tool.

"The free home delivery or free shipping has given most offline retail concepts an advantage and according to Binopal, is what serves as the back bone for many e-trailers.

#### UNDERSTANDING EXPERIENCE

Over 50 percent of the experience at store level is based on emotions that shape the attitudes and drive decisions of a consumer. Binopal points out that shoes have become more than a functional need and are more off an extension of a consumer's personality. Even a customer who comes to the store with his family or relatives, but he would also look for an appropriate opinion from an expert. Ruosh has made it necessary for their 'style associates' who have been trained for 18 days or more on the art of counselling a customer to understand their needs through visual aids



**Footwear for men has come a long way, where it is no longer just a functional need but also a lifestyle choice for men. So far, Ruosh has been the top choice for occasion wear such as weddings and other functions.**

and assessment tools. Customers often take up to an hour to decide on the right kind of shoe. For wedding purchases, the sales team does travel to the customer's house or apparel retailers for better shoe options in case the consumer is short of time.

**"We believe and invest in relationships, and that is what our repeat rates indicate too,"** explains Binepal, **"Things like home delivery, calling and informing customer of new arrivals or meeting his request on shoe styles, taking care of any product complaints further enhance building an emotional connect with consumer like stated earlier."** She explained further that consumers are no longer brand loyal and are in fact loyal to the engagement experience that a particular brand offers.

#### EDUCATING CONSUMERS

Ruosh brand campaign talks mostly about the brand's craftsmanship and up to date style sense centred around low-stress and flexibility in dressing. "This year AW'15 campaign had more lifestyle cues that how shoes are an important part of your social and work life," says Binepal. Ruosh covers branding through print, outdoor, in-mall, cinema and radio advertising. She adds, "We experimented with television in SS'15 for a short duration and were excited with the reach it resulted in - however, we are still a little away from making TV our primary focus since we are still targeting to reach SEC A

customers in the 6 key cities." Having an online presence does add to the brand's visibility. Most consumers tend to look up product descriptions and prices through portals. Between 12-15 percent of Ruosh sales come from the online partners. Binepal finds that special activities, promotion using banner ads on partner page, SEM, e-mailers and the brand's new wedding store which was launched recently with Myntra considering the ongoing wedding season has made it convenient for customers to do last minute shopping. Apart from weddings, the brand has also been associated with golf events for last four years.

#### CHALLENGES AND THE WAY FORWARD

For Indian consumers premium brands equals price plus experience. For a premium brand that uses premium grade leather, the brand tries hard not to hard-sell and ensures that the product is made available at value for money pricing. Footwear for men has come a long way, where it is no longer just a functional need but also a lifestyle choice for men. So far, Ruosh has been the top choice for occasion wear such as weddings and other functions. As the brand is still in its evolutionary stages, the company is still focusing on strengthening its supply chain management and IT system. Steps are being taken to reduce client acquisition cost, improve operational efficiency and developing new concepts with online partners to boost sales on full MRP. Ruosh is available at close to 150 points of sales across 19 cities and the brand is aiming at tripling its number.







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# EASY ON THE EYES

From neighbourhood opticians to multiple touch points, eyewear retailing gets an accessibility makeover

By Mehak Sharma



Eyewear, one of the most unorganised categories in India, has come a long way from being a necessity to an accessory. Initially used as vision corrective devices, eyewear products and perceptions about them have evolved over the years. They have now become an integral part of users' daily lives, be through sunglasses, prescription glasses or contact lenses.

And now, mimicking other consumption categories' integration with technology-driven retail, the eyewear retail category too is witnessing a new wave of efforts to improve ease-of-access and generate better

shopping experiences. As per the analyst firm KenResearch, the eyewear industry in India is set to be worth USD 14.856 million by 2018, a massive growth on its 2007 figure of just USD 1.247 million, on the back of surge in demand from an ever growing base of fashion conscious customers, changing health care practices in India and entry of various online players.

While the changes in demand are visible, the market is still dominated with the presence of a large number of small neighbourhood players, usually in the second or third generation in the business. According to industry estimates, about 80 percent of the market is still in the unorganised sector. Perhaps, to give a

branded makeover to the segment and bring in a much needed revolution in eyewear retailing, some existing players are looking to re-strategise their business model by providing customers all the necessary touch points.

"Technological advancements, improvements in India's digital infrastructure and consumer trends have made the omni-channel retailing model a market reality. These developments have affected the operational procedures of most industries and now the optical industry has also recently come in its ambit," says Sarat Binani, Director, Himalaya Optical. Himalaya, which started with one store in Karachi, now has 90 outlets across India

and is now increasingly looking to adopt an omnichannel route. "In a market like India, personal relationships are very important; however, certain technologies and digital services irrefutably assist in creating a frictionless customer experience, when these customers shift between channels. Thus, the challenge is to find the right mix of personal touch and technological offerings to ensure the highest level of customer satisfaction attainable," Binani notes.

"We at Himalaya are currently associated with a few online retailers based on mutual interest. However, we are looking forward to developing our own website further, not only to create a new sales channel, but to also offer our offline customers various value added services associated with the omnichannel retailing experience. Thereby, the aim is to give best of both the worlds," he asserts.

Major brands, including Titan Eye Plus, Vision Eye Plus and GKB opticals, among others, have also realised the potential of providing multiple touch points to consumers. For instance, market leader Titan Eyeplus, in addition to 300-plus exclusive stores in over 100 cities, provides

an online platform to consumers with its own website. It has also launched a 'Vision Check' facility on its website, taking eye testing to people's homes. Similarly, GKB provides a 'try on' tool on its website, through which customers can see how the glasses look on their faces.

Where these brick and mortar retailers are realising the potential of providing multiple channels to consumers, online eyewear retailers are also increasingly extending innovative offerings to consumers', some are even going a step ahead and opening physical stores.

For instance, online retailer Lenskart has adopted an assisted e-commerce model where some of its consumers directly purchase online, some need help while they purchase and some need post purchase assistance. All these consumers are taken care of by having services like offline stores, free home eye check-ups and 3D trial online. Founded in November 2010, Lenskart started as a pure play online retailer and

moved on to open its first franchised brick and mortar store in 2014. Currently, the company operates through 100 offline stores.

It has grown more than 200 percent year-on-year in the last two years, to be among the top three optical businesses in India today. From an initial investment of ₹30 lakh, Lenskart has now become a ₹360 crore company. Among the online retailers, Lenskart accounts for the majority of the market share on the basis of revenue and presence. Lenstrade, Lensdirect, Yebhi and Rediff Shopping are some other online eyewear retailers."

Eyewear is not an impulsive purchase; most consumers do not purchase eyewear as they are not aware that they need it. By having an omni-channel presence eyewear retailers would be able to boost the touch points and be able to reach maximum number of consumers," Peeyush Bansal, CEO and Founder, Lenskart.com, says.

In addition to robust online and offline presence, the company has introduced features like free home eye check-ups and 3D trial online to redefine the complex eyewear category

"Home eye check-up facility is one such initiative – it is a perfect solution for those who do not have time to go for regular eye check-ups or step out to buy new spectacles. We bring you the optical shop and eye check-up equipment right at your doorstep. Also, our 3D try on allows users to get a 180 degree view of their image with the eyewear on. These services will help us tap the ever growing market of fashion-conscious buyers who are evolving fast, are digitally savvy and want a plethora of options to choose from," Bansal notes.



# LUX COZI GLO

BRINGS OUT THE LIGHT IN YOU

The renowned innerwear brand, Lux Cozi has introduced Lux Cozi Glo for the youth of today who yearn for stylish and attractive innerwear. The new product is extremely fashionable and is exclusively targeted towards the young male generation. The new range fulfills the desire to look stylish and comfortable with its latest trending designs, ultra soft fabrics and unique colours.

Lux Cozi, launched by Lux Industries Ltd. has been in the market for more than five decades. It has been successful in maintaining its aura in the hosiery market as the market leader. Producing new and different products has been imperative for Lux. The brand always tries to bring in new products in the market providing more and more options for its consumers.

## THE NEW RANGE

The Glo range is being launched with three products currently, these include, stylish vests, fashion briefs and interlock drawers. The range is stunningly stylish with innovative designs and cuts. The fluorescent colour waistline of the innerwear is eye catchy and the fabric is extremely soft on the skin. Being one of the first in the hosiery industry to experiment with neon colours, the brand believes that it will be a huge success in the Indian market.

## MANUFACTURING

The trendy and stylish 'Glo' vest is light in weight and extremely comfortable. Made from cotton rich fabric, it gives the wearer a perfect fit and ensures breathability all day long. As Indian males are getting more

and more style conscious, the new 'Glo' vest from Lux will make them look more fashionable and confident.

Likewise, the new 'Glo' briefs and drawers are made from 100 percent superior combed cotton which offer ultra soft fabric and has a body defining fit.

The company has crafted the florescent (neon) waistband especially for fashion oriented people.

The superior cut, stitch and pattern make the products very comfortable to wear and the contrast fabric waistband look very stylish.

## PACKAGING

Besides, the new design and enhanced range, the packaging of the collection has also been designed attentively. The innovative and stylish packaging of all the three products is thematic and enhances the product's feel. Moreover, the 'Glo' range is a complete economic (value-for-money) range so that one can enjoy the richness of the product without losing much from his pocket. According to the company, with this new range, the products selection has not just increased quantitatively but qualitatively too. And, they are extremely confident that the new range will be immensely appreciated in the market and will strengthen Lux's position in the inner wear segment.

×





# DUKE

## SPRING SUMMER COLLECTION '16

Apparel brand, Duke Fashions has launched its Spring-Summer collection 2016 that has been inspired by the creative allure of Bali. The entire collection is targeted at men, women and kids and available on all Duke exclusive showrooms and leading multi brand outlets.

Duke's spring summer collection exudes an easy elegance of summer-time chic with vibrant hues and sophisticated shimmery oceanic blues. The new summer collection boasts of exciting colour combinations, designs in stripes, prints, short styles, embroidery, patch work, short lengths, round necks, collars, washings, etc. providing a right selection for urban street wear category. This collection offers wide options in casuals, office wear and evening wear.

According to Kuntal Raj Jain, Director, Duke Fashions (I) Ltd., "Our target audience is today's youth who is looking for a trendy and stylish range that is sync with international designs, fashions and quality. Duke is a value for money brand and our mission is to make available the international designs and styles at highly reasonable prices. We see it as our duty to provide our customers the inspiration they need to look and feel confident. Our summer collection is also based on the same philosophy."

### INSPIRATION

Known as the Island of Gods for its heavenly beauty and diverse landscape, Duke's summer collection reflects the true Bali magic in its aesthetic appeal. Bali's climate defines what an ideal summer fashion should be like. Having a humid weather throughout the year and surrounded by the beaches, the perfect summer wear should be light, loose and most importantly comfortable. Duke's creation not only highlights the summer clothing but also the designs that uniquely represent the Bali culture. It has been rightly said that Bali's culture is all about self contentment that also coincides with the fact that fashion is self content and beautiful.

### PRODUCT OFFERINGS

With a summer wear collection ranging from t-shirts, shirts, denims, tops, Bermudas, lowers, shorts, value packs and footwear, Duke provides a perfect summer wardrobe for everyone. The brand is also known for its standardised fits, superior quality, wide range and 'fashion-right' styles in its segment, making it one of the trusted brand amongst consumers.

The most highlighted product category are the value packs, which comprise different t-shirts pack in attractive colour

combinations and styles. The value pack range consists of 2-pieces light pique pack, 2-pieces mega short designer pack, 2-pieces v-neck designer pack, etc.

Similarly, women's and kids' 2-pieces value pack are also creating a buzz across the market with its exclusive designing, fitting and pricing. The lounge wear range consists t-shirt and bermuda sets, and t-shirt and lower sets, which is ideal for both night wear and evening wear along with sports and relaxed wear.

### TECHNOLOGY ADOPTION

Keeping in mind the Indian climatic conditions and to keep the freshness intact, the cloth have been treated with special sweat absorbent technology thus making one feel fresh and active all through the day. Keeping the sultry heat in mind, the colours, shades and fabrics are carefully chosen to look cool in hot summers.

### MARKET PRESENCE

Duke has an unbeatable marketing network comprising of over 4,000 multi brand outlets and over 360 exclusive stores across major cities in India. Moreover, the products are also exclusively placed at big chain stores like Central, Reliance Trends, Reliance Market, Arvind Retail, Easyday, Metro, Best price, Total Superstore, Aditya Birla Retail, Hyper city, Brand Factory, Spencers, etc. Online platforms include Myntra, Snapdeal, Jabong, Flipkart, Fashionara, Amazon, Returnfavor and the company's own portal [www.dukeindia.com](http://www.dukeindia.com). The success of the exclusive showrooms is driving the company to new heights.



# FLAIRMEN

A FLAIR FOR FASHION



Looking for high-quality leather accessories plus a product range that bridges the gap between elegance and functionality? Then, explore Flairmen's new stylish line of bags and wallets.

Accessories are a novel way to set oneself apart from the crowd, and accessories are a simple and effective way to do so. If international trends experts are to be believed, accessories are fast catching up in India and specially men's accessories are projected to be a major market in the near future.

Launched with an aim to cater to men's lifestyle needs, Flairmen offers an array of crafted leather goods for men. The classic and versatile bags and wallets collection from the brand add a refined touch to any ensemble. Their fresh designs are synonymous with sophistication and are ideal for any occasion. The range is available on the brand's web store [www.Flairmen.com](http://www.Flairmen.com), Amazon and Flipkart.

### THE COLLECTION

Business accessories might not always look debonair, but Flairmen's new collection of fine leather commodities will serve as excellent complements to the corporate look. The line includes bags, briefcases, wallets, passport wallets and card holders.

**BAGS:** For a seasoned traveler embarking on a new journey, Flairmen bags are perfect

for packing large items and clothes. One can opt for the weekender bag, which has various pockets on the inside for smaller items. Dual grip handles and a removable shoulder strap allow you to wear this bag in two distinct styles.

**BRIEFCASE:** The business briefcase, which features numerous zip closures and compartments to store important items, is also a good choice. Its classic and sturdy structure carry what one needs. Made from eco-friendly vegetable tanned leather, this bag is sure to add a touch of refinement to a wardrobe.

**WALLET:** Looking for a safe way to store currency? An elegant billfold wallet from Flairmen that comes with numerous slots to carry cards and cash, could be what one is looking for. Its unique design is created using high-quality leather, making it the ideal combination of luxury and durability.

**PASSPORT WALLET:** Flairmen's passport wallet is an ideal travel accessory. With eight slots and various pockets, you can safely tuck away your currency bills and credit cards. Additional slips on the inside provide space to keep your travel essentials like passports, boarding passes, and flight tickets. Fashioned out of carefully treated leather, its sleek design is supplemented by a smooth feel.

**CARD HOLDERS:** Flairmen also offers card holders in three distinct colours - brown, black and tan. The case features flap closure to keep the content secure and ID card slot making it the perfect accessory. The look and sleek design ensure that it's an ideal addition to your lifestyle. The eco-friendly vegetable tanned leather adds a unique facet to the piece.





# NEVA

INTRODUCES SUMMER ACTIVE WEAR

The leading thermal and active wear brand, Neva has introduced its latest collection of 'Neva Summer Active Wear'. The collection offer a large range of t-shirts, shirts, trousers, denims, track pants, capri, Bermuda, and value packs for men, women and kids. Crafted with close attention to comfort, quality and style, Neva Summer Active Wears will keep the wearer cool both inside and outside. With its motto, 'Clothing for Life', Neva's latest collection will keep the wearer sweat-free, active, and fresh with its vibrant colours and technology-based clothing line. The active wear range starts from ₹399 onwards.

#### MARKET PRESENCE

Starting from Ludhiana, Neva has surpassed customer's expectations every time in the past 15 years which is attributed to its dedicated and disciplined employee base of more than 1,200 wide distribution network across Indian sub-continent, and more than 300 channel partners who have associated to help the company to create a retail base of over 10,000.

#### MARKETING & PROMOTIONS

The brand signed Saif Ali Khan as its brand ambassador last year to promote its various product categories. According to the brand, the presence of Saif has given a boost to the brand image making it a youth-centric brand.

Neva entered the market with the aspiration to provide unique and international quality clothing to the Indian consumers. This thought gave the impetus to appoint Saif Ali Khan on the board as its brand promoter. With Saif Ali Khan promoting Neva clothing, the level of sophistication and charm of the brand image of Neva enhances manifolds.





# WOOL GETS CASUAL:

Gurbir Singh Gulati talks to Arti Gudal, Country Manager - India, The Woolmark Company, who shares her insights as she says, "India Fashion Form 2016 has been instrumental in connecting suppliers with buyers, and also enables us to communicate the current innovations we are doing with The Wool Lab. These innovations exemplify the positioning of The Woolmark Company and also aids in stimulating the demand for wool at the premium end of the apparel market in both India and globally." Gudal further talks about The Woolmark Company and its strong focus on the Indian market in an exclusive interview.

**T**ell what is the latest with Woolmark activities?

**Arti Gudal (AG):** This time our concentration is more towards sportswear. We are looking forward to tie up with lot of manufacturing as well as retail brands in India. There is a great consumption in sports specially cricket where we are preparing ourselves to develop something in white and blue that they can be used in a big way. Globally the sportswear category is addressed well. We have a runner from Australia who is running from South to North India. A few days back we have facilitated him for the same. He was wearing Australian Merino Wool t-shirts.

**Wool globally has been understood as all weather fiber. How has this concept worked in a tropical country like India?**

**AG:** We are looking at two concepts for India; firstly, wool gets casual and secondly cool wool. The wool gets casual concept is in technical stages right now where we are telling consumers where they can use it in their various aspects of clothing weather it is flat knits or circular knits, light weight starting from 16 microns and going upto 13 microns and nothing beyond that. This is what the idea is so that it can be a day to day wear which India is more of casual wear now than a formal wear country. In 'wool gets casual' we also have wool denim wherein the warp we have wool and on the weft we have some other fiber. This is also catching up and is one of our key highlights at India Fashion Forum. The second concept of 'cool wool' is a tropical one where we are again taking about wool blends. It can be 100 percent wool where the GSM is





# THE WOOLMARK COMPANY PRESENTS THE WOOL LAB SS'17

important and if it is wool blend then it is 50 percent wool and 50 percent any other natural fiber along with the GSM. So what we are trying to promote is that wool is breathable, sustainable and we are trying to tell people that is more of a luxury as it gives sheen and it has a more grater fall.

**India has been a dominant market for men's wear? How is Woolmark addressing the other growing categories like womenswear?**

**AG:** Men's wear we are there. Women's wear is the one which is a nascent stage. This category is growing on the aspect of fashion. Corporate women's wear is not a big market in India. We are getting a lot of fashion designers who are in a way educating the development if this category. Woolmark is also working on trend reports in women's wear. We have experimented and started with shawls and stoles to address this category. Our next movement will be getting into evening wear. The next level of will be to educate the brands about the usage of wool in women's wear. It is very important for brands to adopt this idea and that is what Woolmark intends to do by showcasing what designers have done and how best this can feature in their collection.

**Home linen category with the usage of wool blends has grown in Europe. What about India?**

**AG:** If you look at our manufacturers in Indian in the home linen sector everybody is using wool and supplying globally to the world class hotels. But not in India. We do not want to focus largely on this category as many of the manufacturers and our licensee are not ready for it. It will take some time.

**Tell us about your innovation in wool denim?**

**AG:** Wool denim was done by Malwa Denim who created a collection for European market. There were some colour issues which got rectified. We are speaking to Arvind to create the fabric with wool denim for sampling. We have also spoken to Madura to judge how much intake they can have for wool denim with their portfolio of brands. Woolmark will ensure that the development is taken place, the washes are right.

**What is the ratio of wool consumption in India vs the country which is the largest?**

**AG:** Right now the Australian Wool consumption is 7 percent is what comes into India. About 75 percent goes to China. What we have started in the last 2 years is education at every stage from the mass

to the premium level to the luxury right from manufacturing to the use of wool at brands level. Every month we work on these segments. Post the education form the next one year we need to see how much commercialization has happened which will help us to grow the 7 percent consumption to atleast 10 percent in the next 3 years. If we look at China it has grown from 60 percent to 75 percent consumption ratio in wool. What china does in wool is what we do in textiles in India.

**Is Woolmark trying to position wool as a luxury?**

**AG:** Wool is a luxury fiber, and it is natural, it's rich, it has sheen and it's rare. If you look at the costing it is ₹1,600 a kilo whereas a cotton fiber is not more than ₹200 a kilo. Wool is clearly profiled in the higher bracket even because of its market ration in comparison with other fibers.

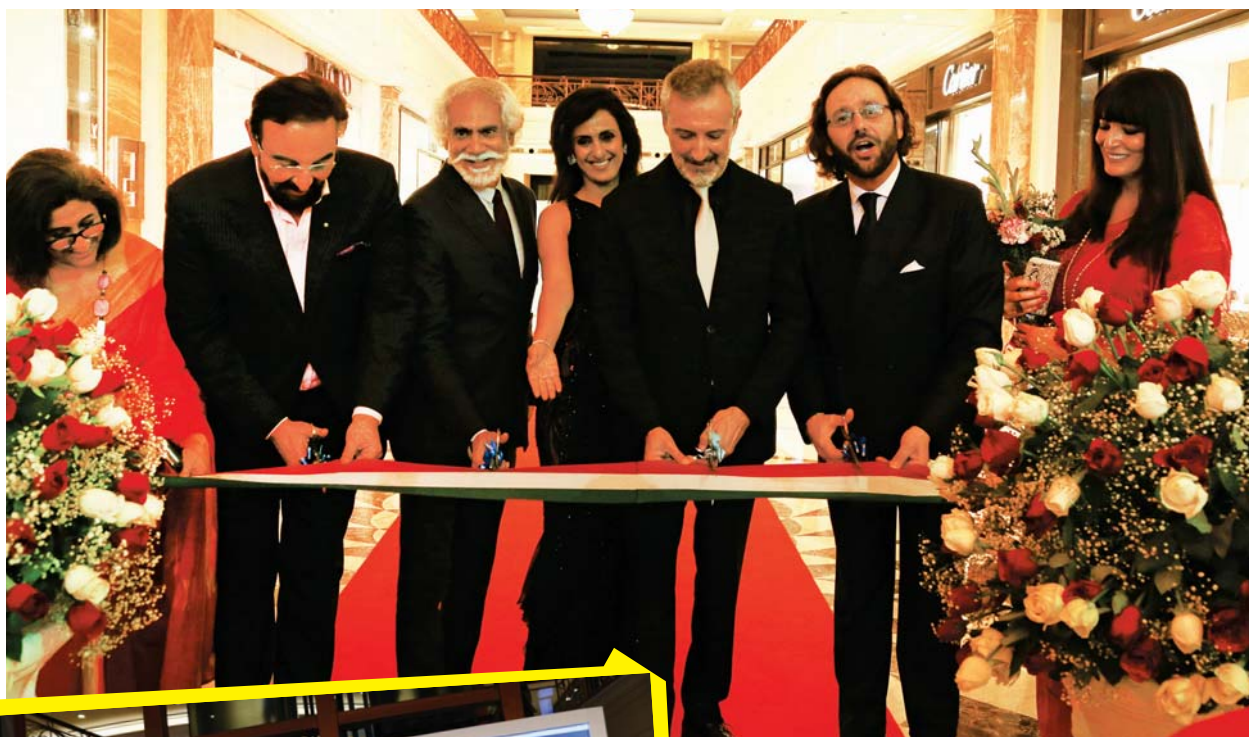
**Is there anything else which you wish to share with us?**

**AG:** Supporting our manufacturers and licensees, connect with retailers. We are looking at a strong connect with India as the exports are going up. We work with large format stores and wish to educate their consumers about wool with an educational view point. We will also continue working with premium and luxury brands which will create a product with wool.



# LA DOLCE VITA

## CELEBRATION OF ITALIAN FASHION, LUXURY & LIFESTYLE



(L to R): Dinaz Madhukar, Senior Vice President, DLF Luxury Retail & Hospitality; Kabir Bedi, Indian Television & Film Actor; Sunil Sethi, President, FDCI; H E Lorenzo Angeloni, Ambassador of Italy; and Dr Francesco Pensabene, Italian Trade Commissioner



The Ambassador of Italy to India, H E Lorenzo Angeloni and the Italian Trade Commissioner Dr Francesco Pensabene announced the unveiling of the first ever Italian campaign in India, 'Italy: The Extraordinary Commonplace' and launched 'La Dolce Vita - Celebration of Italian Fashion, Luxury & Lifestyle'.

For the event, La Dolce Vita transformed DLF Emporio into a virtual Italian luxury hub with an Italian ambience and showcased the latest products and collections from some of the finest Italian brands present in the country.

A two-year long campaign to promote the best of Made in Italy. The sectors the campaign focuses on include design, fashion, food and food processing, infrastructure, smart cities, luxury, and furniture. Under this campaign, a series of focused events and activities in each sector will be held across the country to promote the Italian lifestyle and businesses in India. The event aims to create awareness about fine Italian products, promote Italian companies and looks to explore new business avenues for Italian companies who would like to enter into the Indian market.





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PRESENTS

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**INDIA FASHION FORUM 2016**  
**IMAGES FASHION AWARDS 2016**  
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#### IMAGES FASHION AWARDS 2016



*The 16th Annual Images Fashion Awards (the IFAs) recognised the continuing evolution of dynamic, forward-looking brands at a glittering ceremony which was also the grand finale of the 16th edition of India Fashion Forum.*

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# VAMI

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Billy Whitehouse, Co-Founder of We-eX, Innovator Designer and Creator of FUNDAWEAR



Amit Maheshwari of Exclusively.com felicitating Sudhir Tripathi, Director General- NIFT



Participants at IFF



Mitali Mukherjee, the hostess, in the innovative #unusuals collection from W. W Unusuals also hid surprise gifts under the audience seats at the IFF 2016 inaugural.



Art nouveau sets and stage at IFF 2016.

# INDIA FASHION FORUM 2016

## THE FASHION CONFERENCE OF THE YEAR

A REPORT STRAIGHT FROM THE AISLES SHIVAM GAUTOM & RAJAN VARMA

The 16th edition of the India Fashion Forum, (IFF) went miles in drawing a current and truly meaningful perspective to the business of fashion in India. An industry in the throes of multiplicity of opportunities and challenges chartered the course to clarity via a 7 dimensional focus on the critical agents of change. Presented by online giant Exclusively.com, the two-day extravaganza was hosted at Hotel Renaissance, Mumbai on the 15th and 16th of March, 2016.

For 16 years now, the IFF has been the focal point for all fashion leaders and stakeholders to converge together with a single minded agenda of learning, sharing, evolving and catalysing the growth of the fashion value chain. Touted as “one of the smartest and the most focused fashion business conclaves in India”, IFF attracts the attendance of the most powerful fashion brands, companies, professionals and experts from across the globe in the fields of fashion design, fashion creation, fashion retailing, store architecture, visual merchandising, and other key areas of fashion retail support. The conclave also encompasses the Images

Fashion Awards (IFA), widely regarded as the premier recognition for excellence in fashion and which honors the country’s most admired brands, companies, stores, campaigns, innovations and professionals for their achievements.

Among the other captivating sessions of the event, Anupreet Bhui’s presentation on Understanding Fashion and Trend Forecasting deserves a special mention. Along with a glimpse of what to expect in Spring/ Summer’17, she tactfully detailed out four key influential fashion trends derived from in-depth research and analysis. Also, top voted sessions by the audience were Agnes Kubiak’s (Style Vision, Paris) Global Intelligence, Local Thinking and the Marquee International Speaker’s Note Keynote: The Future of Wearable Technology by Billie Whitehouse. While Kubiak’s presentation elucidated on infusing the global consumer’s insight into fashion and design trends to refresh the Indian fashion brands’ DNA and re-connect with the new age generation of consumers, Whitehouse enthralled the who’s who present with her explication of the next

generation of fashion wearables. Also, in wake of the paradigm shifts in retail, which throw immense opportunities for investments, the session Fashion - An Excellent Investment Opportunity, was well received by everyone.

For those who missed the event, Images BoF brings you a detailed report on the key sessions of the India Fashion Forum 2016. In the following pages, you will find deliberations laden with gems of insight that, we hope, will propel the Indian fashion retail sector in the right direction.

Images BoF thanks the Fashion Management and Fashion Business teams of NIFT, Mumbai and Pearl Academy, Mumbai for their impassioned high spirited reporting. They were invaluable in putting together this report. The teams were Aastha Tandon, Divyani Marwah, Kavina Mehta, Niharika Dahake, Nikhil Dehadrey and Shinjimi Saha from NIFT, Mumbai; and Amrutha Madhusudanan, Gunjari Muherjee, Kushboo Bist, Madura Dalvi, Palak Shah, Priyanka Kabra and Radhika Bansal from Pearl Academy, Mumbai.



# PRE-INAUGURAL PROFITABILITY IN FASHION: WHAT MAKES FASHION RETAIL THE MOST EXCITING BUSINESS TO BE IN.

GUNJARI MUKHERJEE AND AMRUTHA MADHUSUDANAN, PEARL ACADEMY, MUMBAI; AND AASTHA TANDON, NIFT, MUMBAI.

**"Today, mobiles worth ₹15,000 are changed every eight months - why can't it be done with apparel?"**

**The question is not about money; it is about the choice!"**



Debashish Mukherjee

The beginning of 2016 saw the economy facing a tectonic tumult. The importance of profitability could not be ignored even in the dark times, and that, nevertheless threw a spotlight on the affect the economy had on the fashion space. At the pre-inaugural session of IFF 2016, Debashish Mukherjee, Head, Consumer and Retail, A.T. Kearney, took the stage and began his research presentation with a set of statistics revealing the fashion and lifestyle market (inclusive of apparel, footwear and accessories) in India. Estimated at ₹2,21,000 crores, the projections are being gauged at a justifiable 12 percent CAGR over the next five years, against an anticipated minimum of 15 to 16 percent, as per Mukherjee. He outlined the basic

factors such as changing demographics, increasing fashion consciousness, premiumization, e-retailing, impulse purchases, and the younger generation as being the chief drivers ushering in a much anticipated growth in fashion retail.

Two questions, as per him, to be focused upon are - "how are we going to be prepared for that growth?" and "how will we service the growth?" The next 7-8 years, in Mukherjee's view, shall set apart the middle class as the chief drivers of retail growth.

"There are three important aspects that we should consider while preparing for the future," he said. "Firstly, it is the middle class that is emerging as the chief driver of this growth — the present annual income bracket, about ₹5-10 lakhs, is estimated to grow exponentially in the next 10 years. Secondly, the youth is driving the market force; thus in five years, the market shall encounter new customers. Lastly, with the

proliferating number of working women, women's wear will catch up with men's wear by 2020."

The market has to therefore create space for brands that, with an attitude of acceptance and casualization, accommodates the new found consumers. In addition to the aging online generation of today and the women, the projected gradual shift of population, 30.6 percent in the urban area and 69.4 percent in the rural area by 2020, will change the face of Indian consumerism.

The evolving market of tomorrow primarily needs to create new fields of play, either by broadening needs, creating newer occasions, or by increasing demands. The indulgent white spaces, as maybe in sports, plus sizes, teen, or women's ethnic fusion need to be weeded out, created and explored. Secondly, a balanced point of differentiation as in terms of fashion, fit, assortment, in store experience, brand image, price and quality needs to be created. Thirdly, the tailoring of the presented assortment needs to be customised in a way that it aligns to the geographic/cultural preferences of the consumer. Fourthly, the expansion of the brands needs to be such that the availability of online mediums should not be ignored as a possibility in facilitating online retail.

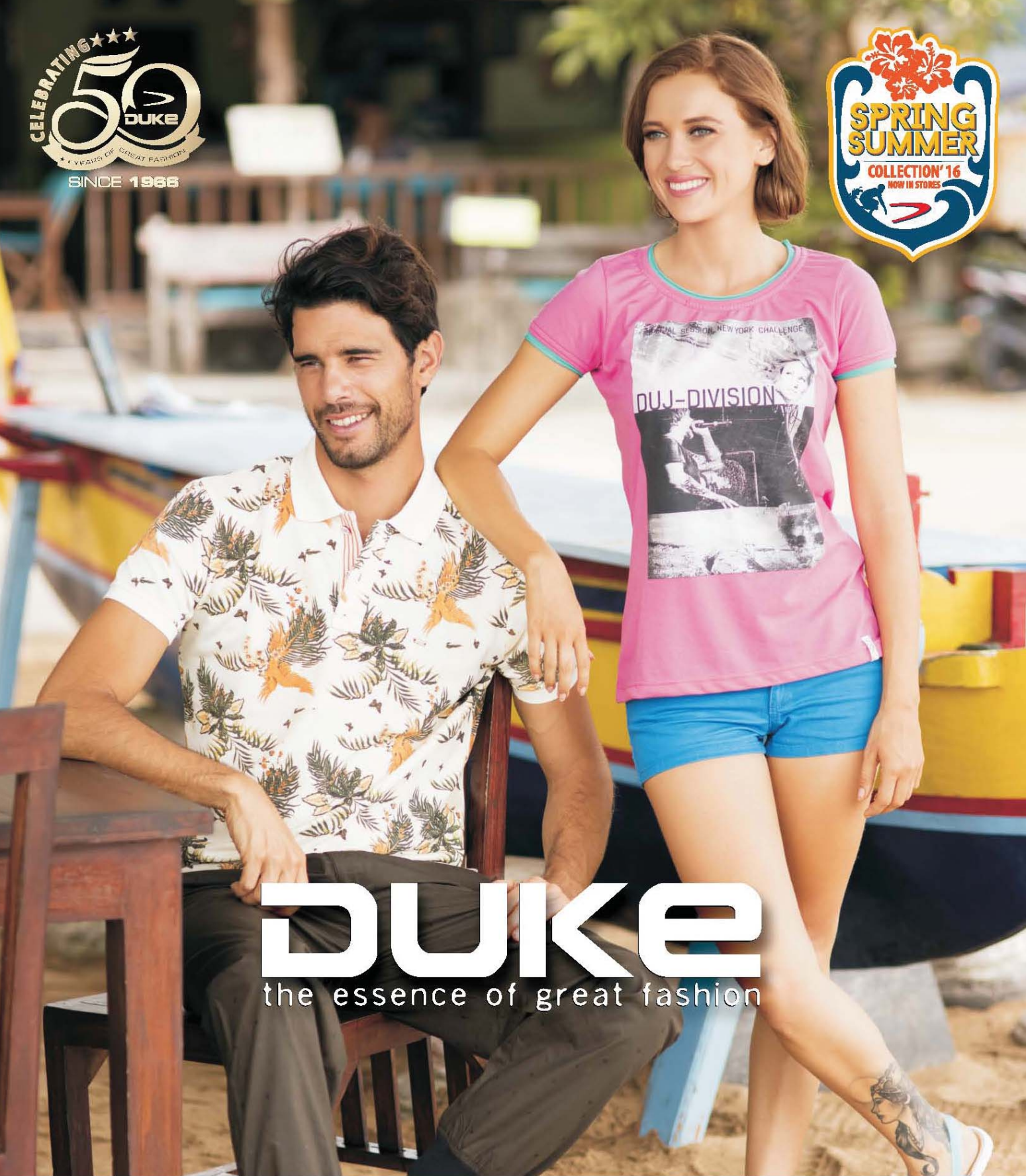
Fast Fashion, as per Mukherjee, is the key to an agile fashion market, which indirectly lends a great competitive advantage. Lastly, the choice between creativity and hard work should be manipulated, and moulded so that designing for low cost is not lost as a motive!

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# THE IFF INAUGURAL

## FASHIONING THE FASTEST CHANGING CONSUMER MARKET OF THE WORLD - THE OPPORTUNITIES AND CHALLENGES

DIVYANI MARWAH AND KAVINA MEHTA, NIFT, MUMBAI; AND MADHURA DALVI AND PRIYANKA KABRA, PEARL ACADEMY, MUMBAI.

IFF 2016 kicked off on 15th March with the inaugural session, “Fashioning the Fastest Changing Consumer Market of the World”. The session witnessed the confluence of some of the most eminent names in fashion retail. Chaired by BS Nagesh, Founder, Trust for Retailers and Retail Associates of India (TRRAIN), panel members included luminaries like Rakesh Bayani, Joint MD, Future Retail; Kabir Lumba, Chairman IFF and MD, Lifestyle International and Amit Maheshwari, CEO, Exclusively.com. In addition to this, two young female consumer panelists were arbitrarily picked up by BS Nagesh to represent the entire millennial shopping generation.

The session was kicked off by Kabir Lumba’s inaugural address, that after extolling IFF’s 16 years of achievement, turned towards India’s ever changing phases of shopping behaviour. “From reckless optimism, we graduated to complete pessimism, which further turned to cautious optimism and now finally we are in a sensible optimism phase. I think, great times lie ahead and growth opportunities are certain if we keep our ears and minds open and learn to collaborate,” he said.

The first topic of discussion was “If international brands like Forever 21, Zara, H&M are a threat to Indian brands or are they opening up the market. Also, are Indian men and women becoming westernized and preferring these brands to Indian brands?”



– BS Nagesh  
Founder, TRRAIN

Opposing popular belief, Rakesh Biyani elaborated how competition creates opportunity and it never kills the market. He said most of these brands have been in India since the past 5 years and have been catering to an extremely potential market that was untapped until then. “A market which was not thought of 10 years back, has today become the number one fashion category and major part of the reason are these brands. They have built confidence in the customers and also fueled brands like AND, 109’F, Kazo emerge and become competitive as per industry standards. It depends on us how we multiply the opportunity,” he noted.

The session further turned to discuss if Indian clothing is losing its share in the wardrobe. Rakesh Biyani differed, stating that brands like W offer fusion of western and Indian wear which efficiently caters to the needs of the transitional market and still enjoys decent demand. He went on to say that “getting westernized” is a long journey.

Biyani’s opinion was supported by Amit Maheshwari, who cited the example of his e-commerce site Exclusively.com which caters to the latent demands of Indian wear even to overseas destination. “We target NRIs who look for occasion specific wear. Although there might be a slight decline in the percentage share of Indian wear in wardrobes today, the spending is increasing – people are willing to shell out significantly more than they did five years ago. Contemporary customers aim to make shopping a fun, seamless, technology aided and a stress busting experience,” he shared.

He added that they plan on venturing into bags, footwear, jewellery and even evolve into beauty and styling events. “It’s time to move from problem sales to solution sales,” he said.

Kabir Lumba shared the success story of Max, which clocked an annual turnover that exceeded Zara’s by three folds. Max is estimating an annual turnover of ₹2,000 crores for the upcoming year. His ideology was simple - to bring high sense of aesthetics and fashion sensibility but at an affordable price. He stressed that the product comes first and only after that, comes the price. He emphasized on keeping things simple, staying tuned to what people aspire.

The discussion was then directed towards the readiness of the Indian supply chain to consider product first and price second. To this, Rakesh Biyani reflected that India is a capable market and the sole key to growth and delivery of outstanding value is “collaboration”. He cleared that by collaborations, he doesn’t necessarily mean



L to R: BS Nagesh, Amit Maheshwari, audience representatives Ananya Thakkar and Sumedha Maheshwari, Rakesh Biyani and Kabir Lumba.

joint ventures but collaborations at the yarn manufacturing, product development and factory level. He said that with their collaborations, they themselves produce 99 percent of their merchandise in India and therefore will be able to make products available at a much affordable price. The next big question was if Indian talent was easy to find and collaborate. While the panelists agreed that it perhaps was easy to find and collaborate, courtesy all new schools, technology and real time data available, the audience seemed to disagree, with hardly any show of hands to support the argument.

The spotlight then shifted to Amit Maheshwari, as BS Nagesh asked him if he takes responsibility for Exclusively.com's design and quality. "Our platform enables brands to reach the consumers; we give first priority to our consumers and are dedicated to giving them a personalized shopping experience," he replied.

He further reflected on ways to improve the supply chain by planning 'Pre Launches' like they do for electronics. "That ways," he said, "a consumer can book products in advance and knows what to expect in the next season."

The panel then moved to discussing "seasons" in fashion. **Do shoppers really shop per season? And how do brands understand these seasons? - the questions arose.**

According to Amit Maheshwari, shoppers today have graduated from seasons to occasions. "Consumers today see seasons as occasions. For example, we have a wedding season now; summer season now comes in terms of a beach holiday," he quipped. However, Kabir Lumba maintained that one has to be practical - the consumer wants comfort, look good and feel good and without getting all three right, one cannot sell.

The focus of the symposium then shifted towards helping budding entrepreneurs learn from the big players about strategic collaborations and its importance. Rajesh Biyani shared that collaboration is omnipresent; if one wants to run a large business, he has to learn to collaborate. He cited the example of the Future Group's collaboration with AND and Biba, which enabled them to put together Biba and AND's design expertise and their distribution techniques together to give the brand a perfect direction.

The next topic was the much awaited "discounting and sales". Lumba minced no

words when he said he wished it hadn't been started, but now that the horses have bolted, there can be no reversal. He accentuated that brands must not at all compromise on the quality of products in the quest for discounts. "Product quality and discounting at the highest level, price not necessarily at the lowest level," he concluded.

Biyani continued the discussion stating that the discount season is here to stay. However, brands must come up and stress on latest trends and styles which entices the customer to an extent that he wants to purchase the product immediately and can't wait till the time of sale. Kabir Lumba extended his support by adding that brands built on the basis of a discount model will have problems in the long run.

The last round of discussion ended on a sustainable note. Kabir Lumba, addressing the audience, confessed that right now, India does not focus as much on sustainability, but there is huge scope. Rakesh Biyani stated that they have been able to bring down plastic consumption by almost 80 percent, but to bring a change each and every person has to believe in sustainable development at a personal level.





L to R: Debashish Mukherjee, Sharad Mehra, Vinay Nadkarni, Sanjay Roy, Dilip Kapur, Chandan Chowdhury, Bhavik Jhaveri, Ganesh Subramanian, Rajiv Nair and Kenny Si Yeol Shin.

## OPEN THOUGHT: CEO THINKPAD

### THE DYNAMICS OF EVER-CHANGING FASHION BUSINESS AND HOW CEOs ARE GETTING READY FOR THE NEXT DECADE

SHINJINI SAHA, NIHARIKA DAHAKE, NIFT, MUMBAI; AND GUNJARI MUHERJEE, AMRUTHA MADHUSUDANAN, PEARL ACADEMY, MUMBAI.



**Dr Chandan Chowdhury,**  
MD, Dassault Systemes, India



The CEO Thinkpad kicked off with Chandan Chowdhury's presentation on leveraging technology and innovation to drive revenue and transform margins. Chowdhury went on to expound the role of technology and innovation in the future of the fashion industry by stating that consumers no longer buy products alone, but rather experiences, making it a major challenge for retailers. The application of technology in every aspect of the business, from product innovation, design, development, B2B, and communications is a must to transform consumer experiences.

A combination of the physical and the digital would not only bring up businesses to a new level of efficiency, but also transform in-store experiences and consumer experiences as well. Chowdhury drives this point by citing a Hugo Boss case study, explaining their success with virtualization and digital innovations in various spheres of their business ranging from product development to sales.

Sharad Mehra was asked about the fashion industry's requirement in terms of skill and talent. Mehra went on to explain that the aspiration level to get into the retail industry amongst undergrads is decreasing. Anything involving operations, manufacturing, retailing and other back-end areas seem to be off-putting to students despite the number



*Lead Presentation:*

**Dr Chandan Chowdhury,**

*MD, Dassault Systemes, India*

*Moderator:*

**Debashish Mukherjee,**

*Head, Consumer and Retail, AT Kearney*

*Speakers:*

**Sharad Mehra,** *CEO, Pearl Academy;*

**Vinay Nadkarni,** *MD & CEO, Globus;*

**Sanjay Roy,** *Executive Director, Puma India;*

**Dilip Kapur,** *Founder & President, Hidesign;*

**Bhavik Jhaveri,** *Founder and CEO, Pretr;*

**Ganesh Subramanian,** *Founder and CEO,*

*Stylumia & Ex-COO, Myntra.com;*

**Rajiv Nair,** *CEO, Celio;*

**Kenny Si Yeol Shin,** *Director and CEO,*

*SHOP CJ Network.*

of opportunities available. With respect to the fashion industry, the key area of interest for students lies in the front-end.

Asked about the feasibility of skilling programs, Mehra mentioned that premier institutions like Pearl Academy are already offering training in this area. However, online education in this field is an option to further ponder upon. Mehra also mentioned that the skill requirement of the hour is the ability to deal with ambiguity, collaborations and communication. Given the rapidly evolving nature of the industry, adaptive skills are being given more weightage than technical skills.

Vinay Nadkarni of Globus was asked about the evolution, if any, that he has seen in consumers, and the impact of the said evolution on the scalability of brands. He replied that consumers had definitely evolved in the recent years. "Today's consumers are smarter, better informed and more demanding, which has a direct impact on brands. Despite the earlier mind-set that traditional retailers were more connected to customers than organized retailers, technology has helped organized retailers to know their customers more intimately,

allowing for customized services and pampering," he said. Another change that Nadkarni said he noted in consumer behaviour was their increasing impatience. "High speed of service is in demand, and meeting consumer's needs as soon as possible is where the key to relevance of a brand lies," he revealed.

Next on the agenda was Sanjay Roy's opinion on the effectiveness of multichannel retailing and the application of technology there. Roy firmly believes that in today's scenario, multichannel retailing is an absolute necessity to grow. "Single channel retailing cannot garner the same depth in terms of market penetration. Technology has to be applied to every aspect of the business, without which there can be no expansion," he said. Roy predicts that in the coming years, at least 5-8 percent of his sales will be from online retailing.

Hidesign's Dilip Kapur was asked about the impact of technology on products and consumer's reactions to the same.

>



**Kenny Si Yeol Shin**

Director and CEO, SHOP CJ Network.

***There is an emotional angle to shopping and stores, and noted that the Indian fixation with profitability had retailers cutting costs in their stores. To restore their appeal amongst consumers, reinvestment will be required.***

Kapur started by talking about the impact of technology on his own products. Technology has undeniably influenced lifestyle, and therefore products. “Every bag,” he said, “must have a designated compartment for laptops or computer tablets these days, making for a challenging situation as far as innovation is concerned. Even to connect to consumers, the brand relies heavily on technology. The ironic part is, however, that the more one steers towards technology, the more appealing anti-technology becomes.”

Taking the example of Hidesign’s handcrafted notebooks, Kapur said that the product was surprisingly popular; owing to the role that technology plays in our lives today. Even more surprising was the demographics amongst which the notebooks found success. Young, college-going students who would otherwise be expected to lean towards smartphones and tablets were the ones who felt the greatest connect to the notebooks.

Chandan Chowdhury confidently expressed the role that technology will play in the sustainability of brands in the near future. “For brands that want to become major players in the market, stay relevant and provide something of value to shareholders, leveraging on technology and digital continuity,” he said.

Bhavik Jhaveri made an interesting point about digitalization being a cultural move, as opposed to a technological move. Citing example of Nordstrom, where certain items in one of their stores were marked with an Instagram Logo or a Pinterest Logo to indicate what merchandise was trending on the aforementioned social networks to boost sales, Jhaveri went on to explain that it is the cultural aspect of digitalization that appeals to consumers and not the technological aspect. And it is this cultural aspect of digitalisation that must be captured and cashed upon.

Rajiv Nair echoed this sentiment when he talked about increasing the allure of brick and mortar stores. He believes that there is an emotional angle to shopping and stores, and noted that the Indian fixation with profitability had retailers cutting costs in their stores. To restore their appeal amongst consumers, reinvestment will be required. One must integrate technological interactivity with consumers with the emotional connect of consumers. The belief that technology will obviate the need for stores is incorrect. Rather, technology works well in driving customers to stores, and should be used further to facilitate customer interactivity within the store.

Kenny Si Yeol Shin spoke about the SHOP CJ story when asked about the role of home shopping and its global success factors which are applicable in India. Despite being a relatively young company, they have been hugely successful and already boast of high profile customers such as Puma. Shin spoke of the power of regional television channels when it comes to home shopping and noted that he had seen great success since he ventured into regional channels.

There was time for only one question from the audience before the discussion wrapped up - **do customers really want this technology that’s being thrust upon them by brands and retailers? Doesn’t he want to choose his products without being pushed into a space of hyper-innovation?**

Chowdhury maintained that retailers and brands will have to find a way to integrate the said technology into their businesses to keep customer experiences fresh. As he mentioned before, it is not the product that the consumer is interested in but the experience. Dilip Kapur added that the application of technology in driving revenue is imperative, but as a consumer, one wouldn’t want to see technology in his products. “As we hurtle towards digitalisation, we are developing a nostalgic taste for all things pre-digital such as the popular handcrafted notebooks Hidesign launched,” he concluded.



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L to R: Rajesh Jain, Mohit Dhanjal, Gaurav Nabh, Rahul Bhalla and Rishab Soni.

## OPEN THOUGHT THE NEXT 5 YEARS OF EVOLUTION FOR THE FASHION AND LIFESTYLE BUSINESS

TANYA KRISHNA, TEAM IMAGES Bof.

The session included a presentation by Sandeep Mukherjee, SAP Hybris Head, Indian Subcontinent which was followed by a panel discussion. Moderated by Manav Sethi, Group Marketing Head and Head, Digital Products & Strategy, Askme.com, the panellist included various luminaries from the fashion retail sector including Gaurav Nabh, Marketing Director, Koovs.com; Mohit Dhanjal, Director Retail, Raymond; Rahul Bhalla, Co-Founder and CEO, Latin Quarters; Rajesh Jain, Managing Director and CEO, Lacoste; Rishab Soni, MD, SSIPL Group; Sandep Kulhalli, Vice President - Retail & Marketing, Tanishq, Titan; Sunjay Guleria, Director - Global Business Development, Exclusively.com and Dr. Priya Mary Mathew, Pearl Academy.

Sandeep Mukherjee, with his presentation, established a relationship between fashion and technology and discussed on how

these two are intertwined with each other. According to him, contemporary consumers are technologically advance, well connected in social media and have varying expectations from their fashion brands and retailers. Quoting a study, Mukherjee maintained that in 2014, the overall retail market in India was estimated at \$ 41 billion and by 2020, 35 percent of this will only come from online means. Further accentuating the fact and the relationship between fashion and technology, he stated that every third search on google from around the world is fashion related and that every year, of all the queries made on various search engines, 66 percent is on fashion. Agreeing to the fact that customers are engaging in online shopping, apart from offline means, he went on to define how technology is redefining customer engagement. The first and foremost point, he said, is mobility first approach, wherein a brand is required to empower its sales representative in accordance with its customers who himself is empowered and have already done a research on the product before engaging with the particular

brand. Secondly, he continued, is engaging your community with gamification which encourages customer loyalty and is also used by brands to motivate employees for better sales. Thirdly, Mukherjee reiterated, is make-over of the store by upgrading the outlet in accordance with the present demands of the consumers. He moved on to the fourth factor, that is IoT (Internet of Things) like magic mirrors, etc., which is coming up as a big thing in the fashion business. And finally, he acknowledged the need to increase personalization in the business, which requires brands to have a 360 degree profile of customers for better service. Mukherjee concluded by recognizing the fact that normally, customers do not recognize the channel through which they can reach to a particular brand, but they recognize the brand. But with the advent of modern technology, customers no longer want to reach out to a brand, but expects the latter to reach out to them. And thus, it is important for the brands to make themselves accessible to the right consumer, with the right product and at the right time.

Taking the panel discussion forward, Manav Sethi quoted a study and said that by 2017,





L to R: Sandeep Mukherjee, Manav Sethi, Priya Mary Mathew, Sunjay Guleria and Sandeep Kulhalli.

Amazon will be the largest apparel retailer in US. He went on to say that India being a country with its population in billions and two-third of the population still under 30 years old, fashion is the largest growing categories across online as well as offline channels. In the opening session, Sethi asked the panel, **"Where do you see fashion as a technology led category one year from now?"**

Rajesh Jain said that any brand, in order to connect to all the potential consumers, needs to be available through all the channels, whether online or offline. He also emphasized on online channel as a brick and mortar store in every town or city is not possible. Setting the tone of the discussion, Gaurav Nabh too accentuated that it is important for the brands to start with the consumer and try and address to the demands of the customers. He also said that in contemporary times, offline brands are trying to bring the same experience through their online stores too, for the convenience of the consumers. Taking the discussion further, Rishab Soni for one, decided not to favour a particular channel of sale but the sale itself. He said that all the brands and retailers are trying to increase sales and are hoping for an increase in consumption rate, whether online or offline is the last in the priority list. At the same time, Soni also maintained that e-commerce is increasing the reach and this, he said, can be a reason in future, for the brands to come up with more brick and mortar stores.

**Next, the moderator asked if the Indian online fashion will ever see a "Xiaomi moment" wherein the company sold around 2 million phones in just 2-3 days without opening a single brick and mortar store.** To this, Sunjay Guleria said that Xiaomi is able to succeed in this because the consumer's interest in mobile phones has trumped as compared to other products and so, a majority of the disposable income is going in that category. He continued that for a fashion brand to be able to do that, it would need to bring unmatched uniqueness in its products. "The point basically is that e-commerce is helping in reaching out to consumers who do not have access to the brand's brick and mortar store," he said.

Meanwhile, Mohit Dhanjal acknowledged the contribution of technology in reaching out to potential costumers. He said that technology has bridged the gap between a brand and its consumers and has enabled the retailers to deliver a product in the same trendy way as in an offline store and also at a great value. Dhanjal said that it is the duty of a brand to be accessible to the consumers and address their demands, by any means, be it online or offline.

Sandep Kulhalli, being in a jewellery business, had a different perspective altogether. He expressed that technology plays a role in this sector too, but is largely limited to gathering the required information before making the purchase. Online retail is difficult in jewellery sector because of changing rates and varying making charges.

**Technology has bridged the gap between a brand and its consumers and has enabled the retailers to deliver a product in the same trendy way as in an offline store and also at a great value. It is the duty of a brand to be accessible to the consumers and address their demands, by any means, be it online or offline.**

Priya Mary Mathew expressed that the millennials are impatient and online is what clicks with them than exploring an offline store. Rahul Bhalla took the discussion forward and said that too much focus is put on technology and the required focus on product is waning. He maintained that brands indeed need to embrace technology, but not at the cost of product quality.

Rajesh Jain emphasised that technology as a word is overhyped. He said that it is an enabler and not an end to things. He continued that technology can only help choose fit, pattern, design, etc., but cannot replace offline retail.

Moving on, Manav Sethi asked why would a high end brand not sell online? Rishab Soni took the question and said that Nike sells online globally and about 5-7 percent of sales come from its online store. However, he maintained that the strategy is to ensure that the brand is sold in a manner that will not dilute the brand image. Confirming to the same thought and concluding the discussion, Rajesh Jain said that online selling of brands like Lacoste will make them lose their exclusivity and premiumness. However, without negating the advantages of technology, Jain said that Lacoste do track customers' purchasing habits, etc., with the help of CRM and that is how they use technological upgradation.



# INTELLIGENT RESOURCING

WGSN: UNDERSTANDING FASHION AND TREND FORECASTING - THE VISION.

## FUTURE FASHION TRENDS FOR SPRING/ SUMMER '17

AMRUTHA MADHUSUDANAN, PRIYANKA KABRA, PEARL ACADEMY, MUMBAI; AND DIVYANI MARWAH AND KAVINA MEHTA, NIFT, MUMBAI.

# WGSN

Fashion and trend forecasting is the prediction of mood, behaviour and buying habits of the consumer at a particular time or season. It is no longer a question of finding your markets or consumers by age, geography or income, but looking into their purchase propensity, based on their culture, mood, beliefs, occasion and geographic locations. It is also dependent on fashion cycle and plays a major role in introductory phase of recurring fashion cycles. The knowledge series session aimed to illustrate the four key influential fashion trends derived from in-depth research and analysis.

Presented by WGSN, the session started with Anupreet Bhui, Senior Editor - Street Style and Trend Specialist from Hong Kong, showing a video on Creative Migration and a glimpse of the expected trends for Spring/ Summer '17, as forecasted by WGSN. After the video, she moved on to the highlight of the session - the 4 key influential fashion trends, that included Digital Wave, Edge Lands, Encounter Culture and Pause.

Anupreet elaborated on different fashion trends forecasted, while unfolding the

different sources of inspiration, mood boards, colour palettes and range plan - both for men's and women's wear.

Digital Wave's vision is to blend global environment with India. "The last couple of seasons have seen re-emergence of old eras, mostly the 80s. Bright colours, CDs, VCR's, Batman games, walkman have a sense of nostalgia associated with them and these elements affect the trends," she said. Colour palettes inspired from the theme will have loud and vibrant colours, be it bright red, sunshine yellow, deep magenta or black. The digital wave theme had three different aspects to it - Eastern girl, which comprised of power suit dressing for women; Armani Classics - quintessential Armani suits from the 80s; and Ship Shape which focuses on traditional stripe prints and mix match of stripes. Women's wear would see a huge trend of duster jackets, double breasted jackets, crop top and pleated voluminous pants. This suggested that next season trend would be more about relaxed and minimalistic clothing. Range for men's wear is probably going to be more about angles, but with soft edges, deconstructed checks, breaking or splicing patterns. Moving on, Anupreet also mentioned about two more themes, Cyber Nights and Pattern Interference, both inspirations for casual as well as formal wear designs.



Anupreet Bhui addressing audience queries.

The next vision elaborated by Anupreet was Edge Lands. The background of this vision revolves around areas where cities end and farms and open land starts. Bhui highlighted the suburban areas, abandoned buildings, and factories, all of which work as a source of inspiration for the theme. It was also about being nostalgic and returning back to the drawing board, to the old times. "The designs from these stories will probably be the new cool," she said. Colours drawn from this story are homespun feel palette with more muted colours. The different patterns or designs which can be adapted are Urban Folk - with more of embroideries, pearls, laces, cutworks; Worn with Love - little texture, floral and rustic at the same time; Pretty Brutal - bringing masculinity to the designs, specially for women's sportswear; Tough Love - giving a tomboyish look to the attire, like denims. Bhui also emphasized on sportswear, jumpsuits and wide leg pants,



the latter two being the key trends of the season. Men's wear leaned more towards weekend styling, comfortable and relaxed outfits. Chintzy floral, large military style buttons, loose oversized jacket with rolled up shorts, all these are forecasted trends. While mentioning about these range, she pointed out the blurring lines between various categories, be it casual or formals.

Another interesting vision she spoke about was Encounter culture. Talking about culture, she mentioned about India and its diversified culture, which plays an important role in trends. The urban influx and increase in globalisation of trends allows innovation of ideas and creation of new trends. At this time of the world, lot of sharing of information happens through social media and through different mediums, which allows access to different trends. She cited some pictures in the mood board that creates trends. Pictures on the board included colourful walls, an

airplane tanker in Punjab, and a lady in a colourful sari from Pushkar – all instrumental in influencing trends. Using things that are handcrafted and recycled could also be one of the trends. **Colour palette of the story is predicted to be bright, like high summer palette with coco-beans, mango and dragon fruit colours. Looking at the story and the mood board, the range plan for women's wear could also draw inspiration from beach patterns and colours. In terms of garment, it is predicted to be plain long maxi skirts, jumpsuits and bohemian styles, tie up tops, etc. The men's range of collection trails yet again from the 80s with loose, pleated and high waisted trousers. Casual style and all over printed shirts are also considered to be in trend.**

Pause focused on relaxing and experiencing things. The core of this theme was real time experience and not the virtual or technology driven world. Coming to the colour palette,

metallic, deep corals, apricots were the colours which radiate a more peaceful sort of feeling. In terms of fabrics, more of fragile and breathable fabrics are expected to be in trend. The women's wear range mood revolves around lounge wear. Even drapes and ruffles could be utilised skilfully. For men's wear, the theme is Zen lounge – quiet and meditative. Sporty and modern take on easy and everyday tailoring. In short, easy, relaxed and hybrid styling could be the new thing, as per Bhui.

The colourful and creative session ended with open questions and answers between Anupreet and the audience. Different questions were addressed to, be it the trends of denim in the near future or about the accuracy of the forecasting done. To sum up, the session had a lot in store for the entire fashion industry in understanding future trends.

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Shubha Pai, Head- Brand Solutions, Flipkart Advertising

## BRAND ALIVE CREATING YOUR BRAND STORY

GUNJARI MUKHERJEE, PEARL ACADEMY,  
MUMBAI.



***Brand Story Ads, the native offering can help brands weave stories to communicate their offerings to the customers in a simple and interactive story format, using content images and product guides.***

Flipkart ads have introduced a new form of advertising called - Commerce Advertising. The platform delivers a holistic view about customer's journey post ad interactions and highlights effectiveness of the advertising campaigns. Brand Story Ads, the native offering can help brands weave stories to communicate their offerings to the customers in a simple and interactive story format, using content images and product guides.

Shubha Pai, Head- Brand Solutions, Flipkart Advertising, elaborated on Commerce Advertisement that was introduced in the year 2016. She discussed that this brand story advertisements is a native, interactive story format. These stories contain images and product guides that enables brands to tell their stories in a crisp and impactful manner. Initially, the brand story has focused on awareness creation with brand story and category pages. Slowly, they extended to product listings, checkouts and other areas. She claims that, today, Flipkart has more than 50 million customers. This universal solution to brands is based on superior data and the buying intent of the customers. She says, "Branded search is 15 percent, aired awareness is 20 percent and unaired awareness is 14 percent." They key building blocks of this solution are creativity, targeting and attribution.

A brand requires a right kind of attention at the right point of time. This directly impacts the target customers. "Flipkart is a great platform to influence customers," claims Shubha Pai. "The magnitude of consumer traffic and intelligent data insights on online shopping behaviour gives Flipkart the edge to provide data driven advertising to marketers," she concluded.



# OPEN THOUGHT

## THE NEXT 5 YEARS OF EVOLUTION FOR THE FASHION AND LIFESTYLE BUSINESS

MADHURA DALVI, PEARL ACADEMY, MUMBAI; AND ASTHA TANDON, NIFT, MUMBAI.

The research presentation by Abheek Singhi, Senior Partner and Director of The Boston Consulting Group (BCG), was an IFF exclusive that aimed to help the fashion industry identify the specific growth categories, categories with the highest profitability, new fashion retail concepts and the next billion dollar fashion and tech ideas.

Singhi gave an informative insight on the evolving fashion business and how it will pan out in the next five years. This evolution is majorly driven by forces like urbanisation, increase in income, changes in attitude, literacy, etc. According to the statistics presented by him, India's consumption is to increase by three folds in the coming decade. The consumption of clothes and footwear in the year 2020 is predicted to increase by 3.8 times as compared to the consumption in the year 2010, while in rupees thousand crores terms, it grows to 1,496 in the year 2020 from 392 in 2010.

Keeping in mind this massive evolution in consumption, Singhi addresses the basic question- **What do consumers want?** **The ABCDE of consumers, he explained, are Availability, Breadth of Assortment, Convenience, Deals & Discounts and finally, Experience. Global consumers fall in the category of having certain combinations of these aspects of ABCDE. However, in India, consumers dedicate equal weightage to all these five aspects. Indians want everything equally, but how could that be achieved?**

"Categories which are created at the intersection of the existing categories are the ones that will stand out in the next five years," quotes Singhi. He claims, "The new consumers want to break the compromise by both spending and saving, being traditional and modern, wanting comfort and style, convenience and experiential, etc."

Singhi further debates that there is no separate online or offline world. The transition between these two worlds is very artificial. The sales made in a brick and mortar store are often influenced by online channels. Having said that, he presented an interesting video to the audience which comprised of a family and the effect technology has on their daily routines. The video threw light on the evolving usage of technology and how our future might be depended on it. "Technology," he said, "is the real winner."

According to Singhi, the right mix between brick and mortar and e-commerce creates the perfect balance. Retailers now prefer to go omni-channel. Formats which provide experience along with convenience are winning. To prove this, examples of brands implementing this concept were elaborated. 'New Balance' is a brand which is gaining weightage in the multi-channel expansion. It has established its "experience store" where the store is designed to reflect the heritage and spirit of the century-old brand. Shoe makers assemble sneakers in real-time in the upfront space of the store. Each pair is sold in special "Assembled in NYC" bags, stamped with the edition number and date made.

Use of different types of "Retailtainment" to engage customers during their purchase process is also fast catching up. Singhi quotes, "To be relevant, stay relevant." Entertaining customers is a unique way to keep them interested and engaged during a purchase. Topshop's Oxford Circus flagship store in London has famous fashion designers, stylists and models, who give fashion advice to Topshop customers. This advice is offered through a unique, interactive mirror installed on the ground floor of the store. Similarly, the innovative concept of Guidesshops by 'Bonobos' have



**Abheek Singhi**  
Senior Partner and Director, BCG.

***The right mix between brick and mortar and e-commerce creates the perfect balance. Formats which provide experience along with convenience are winning.***

taken window shopping to the next level. These Guidesshops allow customers to experience the clothing line, walk baggage free and delivery of their purchases at their doorstep within a day or two.

Technology is thus redefining customer engagement on a large scale. Singhi's seminar ended on an interactive question-answer session where he addressed the issue of Indian brands not being as updated or technology adaptive as their western counterparts because of lack of human resource and lack of investment in technology within the country. Will brands and retailers succeed in transcending these challenges is a question that only time will tell.





Launching the Indian Fashion Whitepaper 2016. L to R: Sanjeev Sularia, Bhai Ajinder Singh, Vishal Kapil, Uma Talreja, Anil Shankar, Hrishikesh Pore, Manoj Krishnan and Rohiet Singh.

## INTUITIVE TECH: BIG DATA

### DECODING THE FASHION LANDSCAPE

### MAKING CONFIDENT DECISIONS AROUND BIG DATA

SHINJINI SAHA, NIHARIKA DAHAKE, NIFT, MUMBAI; AND MADHURA DALVI, PEARL ACADEMY, MUMBAI.



The opportunities that big data can potentially provide for improving merchandising, supply chain, e-commerce, store operations and pricing decisions are immense. Yet, benefits of applying big data analytics to business in today's high-velocity competitive environment still eludes retailers and brands.

The conference, "Big Data" - Decoding the Fashion Landscape, was focused on illustrating a first hand look at how retail analytics can be used to not only have an edge over competitors, but also create new opportunities by exploiting the power of real-time market intelligence, comparing catalogues across marketplaces to spot opportunities and decipher competitor strategies through brand visibility, discount analysis and catalogue movements.

While Sanjeev Sularia, CEO and Co-Founder of the session, presented by IntelligenceNODE, acted as the moderator, speakers of the conference included Bhai Ajinder Singh, MD, M&B Footwear; Vishal Kapil, Director - IT, Adidas Group India; Uma Talreja, Chief Digital Officer, Raymond; Anil Shankar, CCA & VP, Solutions and Technology, Shoppers Stop; Hrishikesh Pore, VP-Omnichannel, Metro Shoes; Manoj Krishnan, CIO, Landmark Group and Rohiet Singh, COO Retail, Tommy Hilfiger India.

Sularia kicked off the conference with his lead presentation, and started with an interesting cricket analogy likening match formats to various retail formats. The traditional 90 over test match was unorganized retail, the more streamlined fifty-over match was organized retail and the glamorous, crisp T20 match was e-commerce. Sularia went on to talk about the evolution of retail from single channel through multi channel, cross channel and omni-channel to relevance commerce.



Relevance commerce is a relatively newer form of retail that has been brought about by the millennial shopper. Millennials, making up three quarters of the Indian population, are now more demanding of shopping experiences that have been curated and customised for them. It is this phenomenon which has given birth to the concept of relevance commerce.

The panel discussion started with analysing of the importance of data crunching with respect to individual brands. Ajinder Singh, stated that over the last few years, his brand, M&B Footwear, has been compelled to invest immensely in technology. “The need is to think more like a software company than a product company. A substantial amount of the profits to be captured relies heavily on data collection and interpretations,” he said.

Reflecting on the different ways and means to store data, Vishal Kapil put forward that in the value chain, harmonization of data for an entire enterprise is a very difficult task. Furthermore, to generate any benefits from data collection, the data must be accurate and it must be prioritized for short and long term goals. Considering the uphill struggle it might prove to be, Kapil recommends outsourcing data crunching through data brokers.

Uma Talreja finds data crunching to be most useful in customer centricity. For a decades old brand like Raymond, data is used to infuse customer centricity into the organization. Talreja detects much more information than what was previously available before the data explosion, which, she puts, has proved to be extremely beneficial for the company. “However,” she said, **“this rapid explosion of data still has leaders floundering as the ‘big data’ exists in different layers, the depth which is difficult to manage because we have to decode that data and read it along with traditional research.”**

Anil Shankar presented big data on a technical front, dividing it into three aspects — data warehousing, converting to information and analytics. Raw data is broken down into analytical language to be interpreted by the business. Be it POS or supply chains, today’s brands rely majorly on data crunching. Justifying his statement, he says that though feeding daily sales reports and uploading the information is a tedious task, it plays an integral role in simplifying the vendor’s work. Hence, data crunching is useful at all points of business including, planning, customer services and others.

Hrishikesh Pore believes that the application of data can be used for three things — understanding the consumer better, understanding the competitor better and understanding one’s own self better. Pore says that omni-channel is currently using data to understand their own self better and in the process, relying a little less on intuition. So for Metro Shoes, data is being used to map the changing preferences of both their online and offline customers.

Manoj Krishnan says that his beliefs are based both on data and intuition. He explained about customer loyalty programs carried for customer satisfaction. On the frontier views of Krishnan, analytical figure drawn out from IT platform unifies cross-selling, sales report and more. Thus, predicting intuition doesn’t always cater

to business productivity but big data analytics direct a new way to prove or disapprove the hypothesis.

Rohiet Singh at Hilfiger uses data to reach out to more customers and sell more to the existing customers. The ultimate aim is to discount less and sell more at full price. Other areas where data is used is customer relationship management and personalisation of customer services.

Picking up on the aim of discounting less and selling more at full price, Sularia asks how this can be achieved. Rohiet Singh recommends mining of existing data in terms of purchasing patterns, consumer behaviour and purchases, and applying this information to their operations.

Sularia then asked the panelists what personalisation entails for each of the brands. Vishal Kapil remarks that customers who come into their stores are usually equipped with prior knowledge, a gait analysis and many queries, and often come into the store informing the sales people of what they exactly need.

Uma noted that customers are more willing to provide the information as long as brands know how to apply it and make optimum use of it. Hrishikesh Pore illustrated how personalization is often done with respect to services for his customers. For example, a store may go at length to procure a design that is no longer in production for a customer who wants it. **How much data do omni-channel retailers make available to the various brands that are retailing on their website? — someone asked from the audience.**

Vishal Kapil said that omni-channel retailers are very possessive about their data, and only provide other brands with this data when they are trying to sell their products. However, he once again recommended approaching data brokers who crunch data and keep track of various trends and information in case it is needed.



# INTUITIVE TECH

## THE NEXT-GENERATION OF DESIGN AND 3-D TECHNOLOGY

TANYA KRISHNA, TEAM IMAGES BoF.

Modern techniques like 3D virtual prototyping is set to revolutionize the product development process. Being the best at translating ideas into products is what makes a brand relevant to consumers and being able to do this quicker than any other company is what will shape the consumers' perception of a brand. Companies that use 3D technology not only can save their time and money, but stands in the line with fashion trends always. The India Fashion Forum 2016 witnessed an exclusive and insightful session, on 3D designing by Jean-Marc Pedebey, VP, Roman CAD, France.

Pedebey talked about the recent happenings and innovations taking place in the footwear industry and also to an extent, in the bag industry in India. He started with a focus on 'Make in India' initiative and went on to talk about ways to transform the country in not just a manufacturing hub, but also as a designing platform in the days to come. Through an approximately 15- minute long presentation, he discussed on the relevance of 3D designing and also on how the footwear manufacturers are coping with high and changing demands of the consumers.

Talking about the 3D designing, he stated that its not the future, but something that is happening right at the moment in various parts of the world and is very much a part of everyday life of the consumers as well as the manufacturers.

Today, consumers exhibit curiosity about

things which they weren't concerned about earlier. In contemporary times, an aware consumer asks questions about the product creation and demand full transparency in the supply chain. "Such demands and the social responsibilities attached in businesses today puts a lot of pressure on the manufacturers in order to remain desirable in the market. These necessitates a brand to change from generalist to specialist and to manage themselves with changing seasons and demands," he said.

Jean-Marc then went on to elaborate the need of the hour — to move from mass production to mass customization. He added that a shift from mass production to mass customization will ultimately bring in more complexities. Footwear manufacturers, who earlier used to manufacture for one brand, now is required to produce different collections for different brands and for different seasons in order to cater to customers' growing and varying tastes. They are now expected to remain on their toes throughout the year as the present mechanism requires them to double the production of designs and this demands availability of the right tools. The objective or the purpose is to "maintain seasonal clarity in a multi- seasonal environment".

He also talked about the tools that are available today for the manufacturers. These include PLM ERP, which is a brand management tool set to manage margin distribution and line planning. It also helps in managing the life of a product from conception to retirement; and 2D CAD software which deals with pattern making, etc.

Taking the session forward, Pedebey mentioned about 3D F.I.M solution. In simple words, he explained the 3D Footwear



**Jean-Marc Pedebey,**  
VP, Roman CAD, France

Information Model as a comprehensive, 3D/ 2D CAD model augmented with complete set of data, that links people, processes and technology. Pedebey maintained that the 3D software is about the design and matching the intent of the customer and the market with cost management and efficiency. Within the 3D design information, manufacturers get all the information ranging from colour, material and cost, all at the same platform.

Any market is not constant and the trend keeps on changing with time. There is a big trend to move from the manufacturing side to the retail side. To quote an example, Pedebey said that Clarks has come up as the most innovative company in the last 20 years and is not just a pretty face, but has content and is moving with a great pace in the retail sector.

Lastly, keeping up with the spirit of 'Make in India', he maintained that in the years to come, India can be a footwear manufacturing giant. "For all you know, there can be a Clark and Wolverine emerging from India," he said.

Jean-Marc concluded with an announcement about the RCS Innovation Summit to be held in Paris on 11-12 May, 2016. The Summit also includes a Paris design tour for Indian delegates and talks on designing, on how people design and implement, along with a visit to a retail store.







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L to R: Jean-Marc Pedebay, Sonita Unadkat, Adarsh Gupta, Nissan Joseph, Rafique Malik, Ishaan Sachdeva, Sanyogita Chadha and Inder Dev Singh Musafir.

## OPEN THOUGHT FASHION AND LIFESTYLE CEO'S ENCLAVE: THE BIG OPPORTUNITY IN FASHION, SHOES, ACCESSORIES, BEAUTY AND LIFESTYLE - THE FAST RUNWAY AHEAD FOR INDIAN MARKET

NIHARIKA DAHAKE AND AASTHA TANDON, NIIFT, MUMBAI.

**"MASS PRODUCTION TO MASS  
CUSTOMISATION" - the central  
piece of thought for footwear.**

The lifestyle industry is undergoing profound changes as the Indian consumer is getting more mature and is giving more and more importance to looking good and feeling good. The session endeavoured to bring together all the leading CEOs to explore the ever-changing lifestyle retail landscape, tap the growing opportunities and discuss ways to successfully grow business.

Moderator Vikas Bagga, Strategic Brand Building & Business Development Leader, initiated the panel on the global lifestyle retail situation, with focus on India's strength

in manufacturing, the 'Make in India' opportunity, brand expansion strategy, and omni-channel. The Indian footwear industry, the second largest in the world, is teeming with opportunities, which are further expected to snowball in the coming years as experts and analysts project Foreign Direct Investment (FDI) to reach a value of US\$ 3 billion in a few years. The 'Make in India' campaign was given an echo as being the most real of opportunities. The discussion in its entirety, comprised of direct and straightforward questions inviting clear cut answers and comments from the panel. On asked about the current state of affairs in





L to R: Mohini Binepal, Yashovardhan Gupta and Swarndeeep Singh.

understanding of the global market involved considering the polarisation in the USA, with the metros becoming dense and the rural population being on the decline. The urbanisation in India led to a shift towards the city at a rate of about 3 percent per year. The survival of the brands can be easily comprehended as a Hockey step curve, where the brands with a short term view could never breathe in the Indian market, while the ones with a long term vision would settle in for a good course.

Ishaan Sachdeva, Director, Alberto Torressi, stated India to be the land with high variability in terms of colour, religion, area, and the diversity of cultures. According to him, India is a “snapshot of the world.” As per his opinion, no single strategy copied especially from the markets abroad could ever work in a wide ranging land like India. However, he seemed favourably convinced about the future of omnichannel retail in the Indian scenario.

Mohini Binepal, Co-founder and Head Retail, Ruosh, brought together the facts and figures to the discussion. The global economy was stated to be growing at a rate of 2.8 percent per annum, with the Indian economy being at 6.6-6.8 percent per annum, the retail economy at 15 percent per annum, and the premium industry at 25 percent per annum. She commented that, “Not at all times, does something new exceed, but if it is grounded in consumer behaviour, it is bound to work.” Roush’s backbone has been based on 2 pillars, namely, product and experience. “The difference between regions in India is known to be pretty high, and developing a suitable marketing mix to satisfy the customer of every area has proved to be quite an uphill struggle,” she said.

***The difference between regions in India is known to be pretty high, and developing a suitable marketing mix to satisfy the customer of every area has proved to be quite an uphill struggle.***

the global market, Sonita Unadkat, Founder and Managing Director, Urban Shore London, replied, “Globally the business runs from pole to pole. The market share and the opportunities available are high at the global scale. In India, one tends to face various challenges though.”

“Globally, Japan is known to be going through a crisis along with China, being in high waters. The penetration, therefore, has been easy and entering the impenetrable markets has been possible. The growth in terms of penetration in the market is huge. A tier - II and - III city expansion howsoever leads to a break up of the market share,” she added. The process of developing an



**Inder Dev Singh Musafir,**  
Director, M & B Footwear.

Rafique Malik, CMD, Metro Shoes also hinted at the diversity making India a tough market and said, "India has a unique, vibrant kind of intrinsic fashion. It is a complex country with no singular moment, which is now being heightened as the metros being moving at a different level and the tier - II and - III cities moving at a totally different pace."



**Adarsh Gupta**  
Promoter and Director, Hello 10.

Adarsh Gupta, Promoter and Director, Hello 10, talking about the need to have a unique business model, expressed that although the objective of every business is to make profit, service and quality shouldn't be compromised. "With an interest rate of 12-15 percent, the profits generally turn out to be an approximate 18-24 percent. In my opinion, UBER is a perfect example of what needs to be considered in the present scenario. The consumer holds the advantage of having both choice and convenience. One can, amidst the pin pointers, never forget that service adds value and leverage on technology and churn out a model that can deliver the customer with all that he/she desires, in terms of quality and convenience."

Inder Dev Singh Musafir, Director, M & B Footwear, highlighted the importance of building relationships, sustaining them and keeping the connect alive to make the process ongoing. Talking to Jean Marc, who believes that technology has not been India's forte till now, he said, "Unless India really gave the enabling environment, there shall be no spark. The highlight of India is that it does have a government that puts thought in armouring it industrially. The problem, however, is that it still doesn't have a plan in place. There is a lot of disparity, especially when it comes to taxation. India needs to take the spotlight and unveil our formidable potential as a manufacturer to the world. We need to strengthen, before we market India in the world."

While accounting for the competitors, the panel acknowledged China and India as being pitted against each other in terms of footwear. The process of mailing in the footwear industry is totally different though. The solution to take the lead, in this respect, has to be a huge investment into entrepreneurship. We need a manufacturing revolution. The complexities, howsoever, shall come to surface in labour and more so, in our overall attitude towards manufacturing. The take away from retail is to acknowledge e-commerce as the biggest thing for India, because it is indeed the sole basis of entrepreneurship in the world. E-commerce has democratized the sector and made its place. The key point is that if you have to fail, fail fast and evolve and emerge out of it. The opportunity available is the 'Make in India' energy. The energy of the campaign has blanketed and enveloped the world, and must be harnessed and prolonged further to keep the movement breathing. India needs to focus on co-creating, and really support and encourage the student base for entrepreneurship.

The panel concluded with an immediate wish list round. Inder Dev Singh Musafir wished that the government relax taxation on footwear and support industrialisation. Ishaan reiterated the importance of rationalisation of taxes, suggesting, to treat everything separately, without forgetting that India is one country. Wishes revolved around young entrepreneurs, having more capital, a desire to understand the consumer and the increasing consumption better and an earnest wish to eliminate taxes on raw materials because India can just not be a fashion destination till we reduce 30 percent import duty. Amidst all, the panel never forgot to evoke the sentiment behind the footwear industry being a thrilling industry till the end. Howsoever difficult, complex and challenging the times maybe, the industry foresees exciting times ahead.



***UBER is a perfect example of what needs to be considered in the present scenario. The consumer holds the advantage of having both choice and convenience. One can amidst the pin pointers, never forget that service adds value.***



### APEKSHA

Management Trainee at 22. Cafe owner at 23. Her food for thought: Life can't be routine.

### ROSHAN

Architect by degree. Now building something truly lofty: His dreams to be an actor.



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# ALPHA BRANDSTERS THE NEXT 'UNICORNS': WORKING WITH FASHION INNOVATORS AND ENTREPRENEURS AND CREATING COMPANIES OF THE FUTURE

DIVYANI MARWAH, NIFT, MUMBAI; AND AMRUTHA MADHUSUDANAN, PEARL ACADEMY, MUMBAI.



The debut session of day two of IFF, the conference, witnessed the confluence of inspiring thinkers and doers of the fashion retail industry, who shared insights on their success in the market and discussed future trends and disruptions that remain for online brands, the sharing economy, wearable technology, and the online/offline retail experience.

Krishna Prasad, CEO and Co-Founder, Mobmerry.com, started the session with a presentation on the ever debated topic of "online v/s offline". He reiterated that, in today's world, there is no such thing as 'offline' anymore. Contemporary times demand a brand to be everywhere 24x7. A brand needs to stay with the customer, and be where the consumer is. And everything has to be made easy, seamless and convenient for the consumer as much as possible. Their needs have to be just one click away from being instantly gratified. Citing 'Ola', 'Taxi for Sure', and 'Uber', he went on to illustrate how the idea of convenience has underwent a total facelift in the recent years. He also stressed that merely creating content is not enough anymore, brands should learn ways to get people to be their brand advocates and touch them socially.

As the discussion progressed to digital influence, Prasad opined that it is all about discovery now. "If a customer cannot find your product conveniently, you cannot sell your product successfully. Consumers don't

read, they scan. It is also important to be sure of what you present to the consumers. It's comparable to window dressing, which is imperative to attract customers to a store," he said.

The session then took ahead, discussing technology drivers in today's time and the first driver to find mention was omni-channel — which is seamlessly establishing the presence of brands across multiple channels. Other technology drivers discussed were easy payment methods and checkouts, Beacons, 3 D printing and wearable technology. Prasad revealed that Mobmerry.com is already in talks with a brand for deploying Beacons. He feels that everything we see today, will keep getting better, and people will be amazed at the speed with which all of this will happen.

**"The key to success for any brand is going to be personalization," said Prasad. "Retail owners are churning to get to know who their consumer really is. Personalization will play a huge role and technology is what can enlighten retailers about their consumer's mindset, moods and shopping behaviour," he added.**

Krishna Prasad's presentation was concluded with a sneak peek of the upcoming Mobmerry.com website, a platform that promises to fill the gap between brick and mortar shops and online commerce websites by bringing the retail stores to consumer phones, thereby driving consumers to the store through target marketing using geo-location. The site will allow store managers



to on-board products, manage SKUs, do real time marketing, manage payments, delivery and customer loyalty in a quick and efficient manner. The pilot project has already been launched in Bengaluru, and in no time will encompass the rest of the major cities too.

The panel discussion followed the presentation, and Prasad asked Vishakha Singh, Founder, Redpolka.com, why did she choose curating with her website. She shared that her website, a podium for curated designs in fashion and lifestyle for women, aims to promote budding and local designers at a nominal fee. "Curation is necessary as we can attract the customer and understand their needs and shell out customised products from a variety of designers. Redpolka.com is the only portal that has a revenue model with a flat registration fee as well as designers' affiliate fee for the product range," she explained.

Akshay Narvekar, Founder, Bombay Shirt Company, was next in the spotlight, explaining his reasons for venturing into



L to R: Akshay Narvekar, Sachin Oswal, Vishakha Singh, Manjula Tiwari, Abhishek Verma and Krishna Prasad.

offline retailing. “Customers,” he said, “are not very comfortable giving measurements online; plus they are more inclined towards touching and feeling the fabric before they buy an apparel. Taking a cue, we evolved into kiosks and pop ups from online retailing, and now we have full-fledged brick and mortar outlets. Once a customer has given measurements and has the satisfaction of physicality, they can always go online and shop because their details would be saved with them. It’s a perfect symbiosis.”

Sachin Oswal, who heads the omni-channel for Shoppers Stop, threw light on the most discussed topic at the IFF — omni-channel. He shared that omni-channeling is not just about shopping, it has made consumers gather information and catalogues way faster and from many more sources. Depending on the situation, consumers buy a certain thing on a particular channel, be it online or in a store. When Prasad asked how will a customer benefit from it, Oswal answered that there’s more

discovery, because one can research online, yet buy offline after touching and feeling a product.

Manjula Tiwari, CEO, Future Style Lab, created a buzz with the announcement of their new fast fashion brand “Cover Story” which is going live soon. The brand aims to get ramp trends into stores in just 2-4 weeks and give Indian fashionistas access to the latest trends from over the globe at affordable prices. “Again, the focus is on speed and omni-channels,” she said, **“Omnichannel is just a way to make the assortment available for the consumers and it doesn’t really matter from where the customer picks the assortment. Cover Story will have a website, but it will only act as a platform to showcase our designs for the brick and mortar store.”**

Further, the panel moved to Abhishek Passi, COO, Exclusively.com. Prasad pointed out an interesting fact and asked Passi, “With an order limit of ₹35,000, no refund policy and a 30-days delivery schedule, do you

think you will attract consumers?” Passi answered that the customers who come to their website are looking for extensive product details and they provide premium products with precise information.

Customers are willing to wait if they know the product that would come at the end of the 29th day is going to delight them. And someone who is really a fashion consumer isn’t really hounded by discounts which explains why 70 percent of their selling is from non-sale season. He also revealed that plans of venturing into premium branded fashion are in the pipeline and in a week’s time, their app would be launched to market these premium fashion brands.

The conference concluded with the fact that technology is a facilitator of retail and in times to come, these two will only be more dependent on each other.



# HUMAN CONNECT

## STYLE-VISION: GLOBAL INTELLIGENCE, LOCAL THINKING: HOW TO TRANSLATE TRENDS INTO SUCCESSFUL PRODUCTS FOR THE INDIAN MARKET

GUNJARI MUKHERJEE, PEARL ACADEMY, MUMBAI; AND NIHARIKA DAHAKE, NIFT, MUMBAI.

style-vision ASIA

**A**gnes Kubiak, Co-Founder and Creative Director of Style Vision, Paris, explained how it is now the time to translate the global consumer's insights into fashion and design trends to refresh the Indian fashion brands' DNA and re-connect with the new age generation of consumers. "Fashion is complicated but inspiring," she quoted.

In recent times, fashion has gone global as trends find their way across the globe via offline, online and O to O (offline to online and online to offline) modes. And it is imperative for brands to come up with innovative ideas for better product visibility and brand awareness. A new Van-Heusen shop in Bengaluru is becoming a more of an experiential place for consumers with its myriad technical applications, enhancing the visual appeal. Brands like Voyolla.com is ready to switch from online to offline. Also, UK based brand Topshop, which sells through Jabong, is setting its opportunities to a offline store.

The concept of consumer expectations has never been so clear. But the general concept is to look good. "The collection needs to be aesthetic. We need to work on the image to expand the visibility of the fashion collection," she said while talking about the big opportunities in the future.

Agnes discussed about 5 trends based on the consumer segmentation. The first two related to the formal wear, the second two related to the casual wear and the last one was on sportswear. She elaborated on how we can relate the global to the Indian vision of the trend.



**Agnes Kubiak**

Co-Founder and Creative Director of Style Vision

### **TREND > FORMALS**

The concept is looking good in a powerful mood. The attires need to be in rhythm to appear smart, and giving a sleek, clean and tailored look with over-sized shoulders.

**WOMEN:** The global trend on women's formal wear is focused on white colour palette and white has always remained a key player when it comes to women's formals in India. Global trends exhibit extensive work on silhouettes like white shirts, longer front/back, sleeveless dresses, with combination of transparent fabrics and various black and white patterns. The club includes relaxed crop tops and trousers, pleated skirts, hem-lined shirt dresses, asymmetrical dress features and more to go on. The power of the matrix between blacks and whites, playing between geometrical patterns and checks are unbeatable.

**MEN:** Slightly unconventional, skinny trousers compliment the details of a tailored suit when worn with a relaxed oversized shirt or a fitted one. The fabric needs to be linen,

cotton, or soft woollen. Black and white pattern in men's formal are also dominant with the art of light prints and geometrics in regular trousers or shirts. In India, cuffs and under-sleeves can be made distinguishing with fitted and crop-trousers or unconventional suits as depicted cleverly by designer Anuj Bhutani in his works. The prints can be experimental with common criss-cross, laying different shoulder pattern and the shirt continuity. When it came to accessories, they had efficient geometric shapes and sneakers which looked very less conventional as if welcoming the new generation.

Agnes also added that 'Denim is the key fabric for the next Spring/ Summer collection.'

### **TREND > ROMANTIC**

Set in a soft seductive mood with delightful senses of colour and harmony.

**WOMEN:** Blossom prints and laces draped under chiffons, ruffles outlined with black have been gaining plenty of love. Denims with fresh flowery look are also accepted for the pretty and easy-going look.

In India, laces have always being in the eyes of the crowd. Romancing in all subtle colours from soft pinks to heavy blues enveloping hemline dresses, loose white shirts, and layer inspired short dresses are in trend. Refreshing traditional patterns and block prints, placed on hues of red, have been reformed for the new generation. Oversized denims, satin trousers used with contrast functioning of designs are gaining demand.

For the Indian market, there were floral patterns too. The inspiration was from





Kubiak revealing the key formulas for better brand visibility.

soft pink colours on short dresses, relaxed silhouettes, and mostly white shirts. Silhouettes like oversized denim jackets with trousers, crop tops, contrasting patterns of white and black were the main ones, as if to reform for the new generation. The accessories are hyper feminine, clubbed on soft and pale hues. Flat shoes, sneakers and tiny handbags are inspired from laces.

**MEN:** Globally, for men, the colours were subtle in nature - pink, off white, light blue, etc. There were delicate colours for spring suits, which had a strong impact of combination in each of the silhouettes. High-end brands like Burberry, Armani, inclined towards the decorative floral patterns and laces in shirts and jackets. For the Indian market, geometric patterns continued with soft colours. Trendy crop short trousers were also steadily coming up in the forefront with childish patterns and doodles on the silhouettes. Particularly in shirts, there were delicate weaves and dobbie stripes, light colours with contrasted buttons and small detailing on the cuffs. Designer Gaurav Khanijo's childish patterns placed on solid whites have also created quite a stir in

the scene. Similarly, Agnes also mentioned the frozen effect on sneakers featured by Dior and Versace.

**ACCESSORIES:** Toiling around with gold and silver, frozen effect and animal prints are good to go on footwear and handbags.

#### **TREND > STREET LOOK**

The third trend discussed by Agnes Kubiak was based on casual wear which she referred to as the "Street Look". It was "good looking in transgressive mood". The inspiration was taken from big cities, which caught the energy at the perfect level.

**WOMEN:** Non-stop, hyper-reactive and hard-rock campus are all over the runways. It builds up the good looking image in a transgressive and rebellious mood. Globally, for women, the trend was of oversized garments with shred surfaces. Lot of emphasis was given to the front pattern of the silhouette. Skinny and fitted shapes, leather trousers, bleached denims and slogans were also a major factor for women. Colours like bleached indigo, orange and purple were on the rise. For the Indian trend, comics and campus basketball

were taken as inspiration. The colour black was the highlight for accessories. Shred, badges and shred denims were used for bags, shoes and sneakers.

Fitted leather pants (Designer Ashish and Soni), bleached indigo (Designer Abhi Singh), comics and basketball inspiration (Designer Amit Agrawal), meshed shrugs from sportswear derived within fresh colours, are hugely getting stake. It only makes solid sense that the runways' main aesthetic reference of the '70s has made its way to the street. The evidences are suede, flares, furs and fringes. Female and male accessories range on the same lines of black, studs and badges and shreds with shoes, footwear and handbags.

**MEN:** The global trend for men was fitted teddy blouson and oversized denim jackets. The street art inspiration was taken for printed patterns, which were not only used for shirts and t-shirts but also for cropped pants. For the Indian market, stone wash and patchwork was highlighted

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Enthralled participants during Agnes Kubiak's presentation.

in denims. The trend continued with colourful graphities and monochrome patterns in shirts and t-shirts. Agnes also elaborated on the trend of photo collage shirts designed by Ashmita Marwa.

Furthermore, the street look in men's wear had campus small checks and patchwork on the shirts. Studs and graphities were the major trend for men's accessories providing a black, hard rock feeling.

#### TREND > URBAN JUNGLE

Urban Jungle resonates with discovering new cultures, wild nations and looking good in an adventurous mood.

**WOMEN:** Global trends for women showed silhouettes in military style, deconstructed patterns, camouflage prints and fringes. Sweaters and jackets exhibited a childish mix & match and exotic flowers, while skirts displayed animal prints. Elegant safari look, animal skin patterns and prints of exotic birds on garments, were the trends for India. Gold, wood, leather and handcrafting on bags and shoes were the major trends for accessories.

In India, ethnic patterns were used as the new urban camouflage, brought down on runway by Anita Dongre. Blended

with brightly coloured batik, geometric tribal prints or collections from designers with a rich African heritage, Spring/ Summer's styles are bursting with sub-Saharan vivacity.

**MEN:** Global trend for men consisted of comfortable and soft military styles. New camouflage and exotic flowers were seen on shirts and trousers. In India, patchwork for the silhouettes worked the best with Piyush Dedhia's designs, elaborating on the new camouflage patterns. Natural materials like linen cotton were mostly used for men's wear with subtle colour combinations like cream and peach. The shirts were hand woven like doobby and over printed patterns is the set trend. For men's accessories, natural and subtle colours and animal skin, was variedly used in bags and shades.

#### TREND > SPORTS FUSION

This trend shows off the healthy mood when the dynamic daily life meets sports. High tech materials, asymmetrical shapes and cuts are the call of the season.

**WOMEN:** Globally, silhouettes for women had high tech materials with mesh and contrasted piping, long fitted shapes and melange yarns. For India, she had a 3 stripe story, where the trends were a fusion of sports and traditions. Designs by Anamika Khanna and Malini Ramani were used to explain this trend. The garments gave a tennis club feeling and the dynamic attitude was well portrayed. Fancy

accessories were in trend, where lightweight materials were used vividly. For men's wear, neon colours, shaded effects and psychedelic patterns were shown for the global trends. She also elaborated on bomber jackets and mesh and melange yarns, that were used for the silhouettes. For Indian trends, transparency was a major factor coupled with melange yarns and comfortable shapes.

Indian cottons can also be used for a combination that looks futuristic but feels totally snug. The conventional blazes of black and white are good to go with minor detailing of laces. Psychedelic patterns in blurred greys and blues, teamed up with bomber jackets can very well compliment men's attires.

**MEN:** The men's shirt had relaxed end on end blurred effects and horizontal stripes on them. Accessories included hyper performance sneakers (like the ones by Nike), camping and backpacking accessories, etc.

The presentation went miles ahead in establishing the fact that Indian designers will have to push creation beyond boundaries to keep up with the trends of the season. "As the very talented Dhruv Kapoor (Designer) says," Agnes concluded, "I'm not scared to experiment with colour or proportion and I'm pushing hard to change the mindset. That is the spirit."





# PREMIUM LEATHER BAGS AND WALLETS FOR MEN



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L to R: Srinivas Rao, Alexander Köth, Pooja Maheshwari Salwan, Dheeraj Chawla and Sudhir Gupta.

## INTELLIGENT RESOURCING BUYING AND MARKETING HEADS CONCLAVE: BUYING AND SOURCING FROM A RETAILER'S PERSPECTIVE - WHAT'S NEXT AND HOW TO MAKE IT READY FOR THE OMNICHANNEL CLIMATE AND RAPIDLY CHANGING CONSUMER TRENDS

KAVINA MEHTA, SHINJINI SAHA, NIFT, MUMBAI; AND MADHURA DALVI, AMRUTHA MADHUSUDANAN, PEARL ACADEMY, MUMBAI.

Product range and assortment are at the heart of the ethos and success of a retail store. As retail evolves in a highly competitive omni-channel climate with a more empowered consumer, in this new retail climate, good marketing and a strong product range are the foundations of success.

A lot has been talked about change in the fashion business and how customers are now digitally empowered. **But how is this affecting the buyer today? How are they collaborating with the marketing team?** These were a few of the core questions discussed in the Buying and Marketing Heads Conclave.

Srinivas Rao, Vice President-Marketing of Lifestyle International, along with Bhavik Jhaveri, Founder, Pretr, initiated the seminar

addressing these questions. The session stayed engaging with an interesting panel comprising of top marketing names from the fashion industry — Alexander Köth, Managing Director and Founder, Minodes GmbH; Pooja Maheshwari Salwan, Category Head - Fashion Accessories, Reliance Retail; Dheeraj Chawla, VP and Head- Menswear, Lifestyle International; Geetika Srivastava, Chief - Lifestyle Merchandising, Aditya Birla Fashion & Retail - Pantaloons; Kapil Bhatia, Fashion Business Head, Askmebazaar.com; Siddhant Rana, Head, Business Development and Merchandising, Exclusively.com; Atul Bajaj, Executive Director - Product and Sourcing, Puma India and Sudhir Gupta, General Manager - Buying, Merchandising and Sourcing, ITC Lifestyle Retailing Business.





L to R: Bhavik Jhaveri, Kapil Bhatia, Atul Bajaj, Geetika Srivastava and Siddhant Rana.

***There are a plethora of reasons underpinning a customer's decision to buy online or offline. A customer normally finds a greater width of products online. However, when a customer is buying a new technology, he generally wants to check out the product physically, which can't be achieved online, yet. For this purpose, the customer will always visit a brick and mortar store.***

The entire session conformed to a strict question-answer format with Rao and Jhaveri questioning the rest of the panel. It began with Rao asking Atul Bajaj about his learnings about online opportunities in the Indian market keeping in mind the marketing and sourcing of Puma.

Atul Bajaj responded that initially, Puma treated their online retail space just like any other sales opportunity. However, they soon learned that online retail is a whole new ball game. There was a very steep learning curve, and it became very clear that a different strategy would be needed for marketing and merchandising on the digital platform. A few key lessons have been picked up from that time, the most important one being that visual merchandising is as important in online store, as in brick and mortar stores. There is a range of merchandise available to customers at the single click of a button, and brands must consider the visual impact their layout and interface has, on their online consumers. The second lesson was that the online and offline do not exist at the cost of each other. Both spaces are complementary to each other. Furthermore, online and offline can co-exist profitably as well. For strong online performance, Bajaj said, strong

offline presence is the key. The third lesson is something that online retailers need to pay particular attention to — the online retail space is not a bargain counter. The sole aim of the online space should be to maximise full price sales.

When asked about the difference between the online consumer and the offline consumer, Bajaj pointed out that the difference lies in consumers' behaviour rather than in the consumers. There are a plethora of reasons underpinning a customer's decision to buy online or offline. For example, a customer normally finds a greater width of products online. However, when a customer is buying a new technology, he generally wants to check out the product physically, which can't be achieved online, yet. For this purpose, the customer will always visit a brick and mortar store. In addition to this, offline shopping is also about instant gratification. Therefore, consumers must be understood as individuals with purchasing behaviours that vary with the mode of retail.

Shifting the focus to men's wear, Rao questioned Dheeraj Chawla about the evolution in men's fashion. Chawla had some interesting outlook on the same.

>

Chawla noted that there is definitely an evolution, and it headed in the right direction. "It is not adapting to westernization but globalization instead. With the high number of brands coming in, consumers are becoming more aware of styles and trends," he said.

However, in the shorter term, India as a market, takes time to catch up to new trends. Approximately, international trends take an average of two seasons to trickle into the Indian market. Additionally, men are slower in catching up to international trends as compared to women. This is because they are not as experimental as women. "The development in the men's wear market is therefore slow, but steady," he said. Also, this is visible in the change in male consumer patterns. Men are definitely getting more fashionable, as indicated by the rate of sales and best seller statistics. The uptake is very fast.

Stating on the same, Atul Bajaj said, "In the last 2-3 years, tier-II and -III cities have witnessed a drastic change in men's consumerism. People are open for bolder options now. I can't comment globally, but in India, there is a definite shift in how people are reacting to new designs." Speaking about the shift, Dheeraj Chawla continued, "The lines today are blurring. A lot of cross selling is happening as seasons pass by. Casuals are becoming smarter, formals are becoming more comfortable and so on. There is a refreshing change and people are now experimenting."

Next, Geetika Srivastava of Pantaloons revealed her learnings from online retail. According to her, while there is no significant difference in the kind of products being purchased online and from stores, they are able to mine data, giving them fresh insights into consumer behaviour patterns. For example, customers from interior towns seem to have a bolder taste in product choices than one would conventionally expect. These customers purchase fashion forward products online, giving Pantaloons,



Alexander Köth addressing the audience on data mining through online retail.

a reason to reconsider and relook their merchandising mix. Srivastava attributes this shift in purchasing patterns to increasing awareness among consumers. "At the click of a button, consumers are bombarded with so much choice of fashion now. The online space has catalyzed trend awareness bringing in styles much faster than it did before," she said.

On asked about his take on merchandising and what has worked for him so far with regards to e-commerce, Siddhant Rana pointed out that the e-commerce on Exclusively.com differs significantly from other online shopping portals. This is because Exclusively.com is primarily a designer portal and the merchandise they carry belongs to the forefront of trends, that one hardly sees on other online retail sites. In terms of merchandising, Exclusively.com pays particular attention to consumers' desires and requirements, which are then relayed back to the designers. Siddhant also pointed out that one of the most popular segments on Exclusively.com is ethnic wear and occasion wear, which is an encouraging thing. "Servicing 150+ countries and a lot of global consumers, event-based sales tend to rule the roost for Exclusively.com," he said.

Taking the discussion further, Sudhir Gupta spoke about the importance of collaboration between the buying, marketing and design teams, and stated that the three must ensure communication and involvement with one another. For example, at ITC Lifestyle

Retailing Business, the marketing team is a core part of the buying and range selecting process. They are privy to what is being bought and why, and there is healthy dialogue between the two teams to decide what will be communicated to the consumers. This minimises any room for errors. Even after collection launch, when communications are to be refreshed mid-season, there is joint direction between all teams. In addition to this, there is also a major use of backwards communication. The marketing team often uses their own research agencies to detect what is working and what isn't amongst the styles and trends, and this data is given back to the buying teams, who apply it to their decision-making processes.

Geetika Srivastava also elaborated on the dynamics and the extent of her marketing team's involvement in range development. She said that the starting point is the design team. Once the design team hones in on a trend along with the merchandising team, they sit and design a marketing plan. Communications and the story that they want to convey is finalised upon, after which they get started with creating a line of generous width to offer to the consumer. Therefore, here too, the design and merchandising teams are very clear about the marketing plan.

Reliance Retail's Pooja Maheshwari Salwan, put forward her predictions for and observations about the Indian accessories





**Retailers need to remember that the concept of pure space, as in purely online retail or purely brick and mortar will cease to exist. The two not only co-exist but also will heavily feed off each other.**

approach that is followed at Askmebazaar.com. Instead of classifying cities into tier - I, and - II categories, they believe in categorizing consumers into different tiers. This allows for laddering within the society, lending more flexibility to the merchandise mix.

Given the unpredictability of the fashion industry, Srinivas Rao asked the panellists whether they could see any predictive/ analytical tool replacing the role of instinct. The panellists seemed unanimous about the possibility being minimal. Dheeraj Chawla reiterates that in the fashion industry, a combination of both analytics and intuition is needed. Numbers and analytics only give a one sided story. When you see the evolution of trends and how they trickle in, how they are interpreted, that is where intuition kicks in. He added that there are such tools that already exist in the market, **but it all connects back to what you think is right for your business. "Its about what works for you," he said.**

Geetika Srivatsava chipped in saying, such tools or computers cannot take over fashion. Applying one formula to one region doesn't work, and it is here where intuition comes in. Pantaloons follows "Many India Merchandise" whereby different regions are targeted with different merchandise, keeping in mind the different characteristics.

Atul Bajaj said that while a predictive or analytical tool cannot replace instinct, the two do go hand in hand. One must remember that fashion can be and is often created. This will always be done by humans. Predicting whether the creations will appeal to broader sensibilities can be partially done by technology.



market. She started by noting that consumers are no longer buying just products, but rather, entire experiences. She sees stores transforming into entertainment centres, ensuring customer engagement. Going forward, she pointed out that accessories are set to become the next big thing amongst consumers, be it watches, footwear, bags or other wearables. Customers are now noticing the transformative abilities of accessories. As little as one product can transform a formal work outfit to a party outfit.

**Social media will also play a tremendous role in the growth of accessories!** Often, designers promote their products on social media, crossing national borders and reaching international consumers quicker than any form of non-digital communication would have permitted. Therefore, Indian consumers are adapting trends very quickly and are becoming more aware as well. Additionally, the consumer is hungry for products catering to their specific needs. Retailers must take note of this and get the required products into their stores as soon as possible.

Next, Alexander Köth put forward his observations about the relationship between e-commerce and brick and mortar retail. Koth says that comparison between the two formats is unfair. No one format is better than the other, but they are complementary to each other. A strong physical presence strengthens online performance and **online can help brick and mortar with data mining.** In a brick

and mortar store, one cannot keep track of consumers and record his behaviour. Brands don't know which other brands consumers have visited or considered, what products they have browsed through and which products have been rejected or accepted. Such information is integral in optimizing customer experiences. In online, however, every move of the customer is monitored. From what products are considered, the time taken to make a decision about the product, feelings about the price points, there are all kinds of conclusions that can be deduced and drawn. Though consumers behave differently online and in brick and mortar stores, this information can be used to understand the individual consumer as a whole, augmenting his entire experience. Retailers need to remember that the concept of pure space, as in purely online retail or purely brick and mortar, will cease to exist. The two not only co-exist but also will heavily feed off each other.

Köth also spoke about the differences he noticed between retail stores in India and Germany. One major distinction, he pointed out, is the footfall. He observed that Indian footfall is significantly higher than the footfall in European countries. Interestingly, India's high footfall is concentrated in the malls, but not within the stores. Retailers are not able to convert the footfall in front of the store into footfall within the store. This, he found curious, especially since services and staff are always available in Indian stores, but rare to find in European stores.

When asked about the online consumer of today, Kapil Bhatia elucidated on an interesting

# OPEN THOUGHT STORE CONCLAVE: 'SMART STORES' FOR SMART SHOPPERS - THE STORE OF THE FUTURE THAT IS NEEDED TODAY, AND VERY MUCH POSSIBLE TO BUILD TODAY



PRIYANKA KABRA, GUNJARI MUKHERJEE, PEARL ACADEMY, MUMBAI; AND AASTHA TANDON, NIFT, MUMBAI.



Moderators Huzefa Merchant and Prasad Menon with delegates from Benetton, Shoppers Stop, HRX Brand by Hrithik Roshan, Being Human and others.

***Retail is changing like never before, and so are the stores. From digital hangars, lighting and mood solutions to fitting room apps, brands are pushing boundaries to make the shopping experience engaging and surreal for the demanding shopper of today, who expects the best-in-class ambience at his service.***

Looking back within the last decade, it is clear that technology has become a large part of everyday life for the average consumer. Customers, today, are as tech-savvy as ever, and have come to have a profound impact on retail. Today, retail shopping and technology are becoming increasingly more linked and is evolving at a pace hitherto unseen.

The advent of omni-channel has opened doors to unfathomable opportunities for physical stores to be the next big thing cashing on its innately live, sensorial and experiential quality. Today, magic mirrors, touchscreens, and digital dressing rooms aren't futuristic

anymore and are increasingly making their way into stores. The session focused on maximizing these effects and showcasing the potential of physical stores as powerful media points, from which retailers can articulate their brand story, excite consumers about products and then funnel their purchase to any number of channels, devices and distributors.

The panel discussion was moderated by Huzefa Merchant, MD, INSYNC Retail and Prasad Menon, Associate Partner, Better Future (India) along with panelists Animesh Ikshait, Head-Projects and VM Benetton; Arden D'souza, CCA and Head-Visual Merchandiser, Shoppers Stop; Ashima Vora,



Head-Brand marketing and Operations, HRX Brand by Hrithik Roshan; Charneeta Kaur, Head, Customer Engagement and Brand Merchandising, Snapdeal; Ekta Saran, Head-Entertainment and Leisure Store Retailing, Landmark-Trent-Westside; Faiz Thakur, Head-VM, Globus; Nagendra Pratap Singh, Head-Visual Merchandising, Raymond; Payal Phadnis, Head-Store Design and Development, Puma India and EEMEA stores; Sandesh S, VM/ Store Design Head, Arvind (Arrow, Izod and Hanes); Sambhav Chauhan, Executive Director, Jade Blue; Samarjeet Singh, Founder and CEO, Iksula and Kunal Mehta, VP-Marketing, Being Human.

Starting with a presentation on digitalizing retail scenario, moderator Huzefa Merchant mentioned about evolution of retail from bazaar to stores to supermarkets now. Customers' interaction was with only one channel earlier, whereas, now multi-channel has become the reality. Citing an example on customer's evolution, he demonstrated that 80 percent of the customers nowadays own a cell phone and 8 out of 10 uses a smart phone while shopping. Talking about shopping experience, he pondered over the concept of 'smart shops', which involves wiping out static sineages and incorporating self checkout and giving a real time experience to the shoppers. He ended the presentation with a question which marked the beginning of the discussion - 'Is it possible to integrate physical and digital retail?'

The discussion can be broken into two sub parts - first, integration of physical and digital world and second, the importance of sales staff training in today's scenario. There were different opinions on possibility of integration of online and offline retail. Also discussed were smart shoppers, who are aware, equipped and resourceful. But according to one of the panelist, today's customer do not buy for product value. Customers on digital platform, could be likened to snacks consumption. These empowered customers take data from aggregators, waits for discounts and then makes consumption. But on the other hand, there are shoppers who are task oriented and their consumption tendencies are not oriented on discount. Debating about smart shoppers, Payal Phadnis of Puma, illustrated one of their campaigns where they reached

their customers and physically tapped their experience by asking them to write about it. Nagendra Pratap Singh gave an overview on how the new retail format should be like — more technology driven, allowing customers to have a trial room experience, and checking out anywhere from the physical environment.

As the assembly debated over digital stores and pop-up stores, Ashima Vora, favouring the pop-up stores, said that since this store format is price effective and convenient, retailers can head towards the same. **"The entire idea and modularity that pop up stores provide is impressive, so why it has not caught up here?"** she asked. But the main question is whether brands want to be recognized as pop-up stores or not. The word digital is also associated with e-commerce and online stores. Utopia, however, is expected in having the best of both the worlds — online and offline. Referring to giants like Apple and Samsung, Animesh Ikshith insisted on physicality of stores. He said profitability comes from brand presence and even though these giant players can sell only through online, they have made their presence physical. **"The sensorial and experiential quality of brick and mortar stores cannot be replaced but considering the role of technology in today's world, adding e-retail to enhance customer convenience and brand visibility has become imperative,"** he said.

Shifting the focus back on 'smart shops', the conclave discussed about smooth checkout and improvement of sales staff for the long run. Arden D'Souza of Shoppers Stop revealed the benefits they have reaped and the starkly improved customers' experience noted after introducing easy checkout system in their Malad outlet. They allowed customers to dump their products and provide address details and the product was then delivered to them. This move worked for them and now they have introduced pop-up cash counters in their store.

Another good example is the Rebecca Minkoff store, which has introduced an app which provides checkout through the app itself. This explains that how important it is for the retailers and the brands to be ahead of their customers and be at their heels all the time

***The sensorial and experiential quality of brick and mortar stores cannot be replaced but considering the role of technology in today's world, adding e-retail to enhance customer convenience and brand visibility has become imperative.***

as well as how customer experience can be ameliorated with innovative solutions. Huzefa Merchant shared his experience of how his first store actually did not generate much revenue in the beginning but it was the idea that managed to survive. **"If you do not provide solutions, there is an unorganized market to take over,"** stated Samarjeet.

The discussion turned towards the significance and survival of sales staff in retail. While Samarjeet Singh had a very critical opinion on existence of sales staff in the long run, most of the panelists were very much convinced that sales staff or human resources is utterly important for any business to run. The idea which propagated was training of sales staff and making them acquainted with web learning, products and customer handling. Most of the panelists strongly believed that retail is still sales force dependent and that it is a fantastic way of building brand loyalty. But the major problem faced is the high percentage of sales staff turnover. But then, training the sales staff is important for better customer experience.

The one and a half hour long table discussion also noted an honorary mention to smart phones, which has now become an extended part of smart shoppers. The challenge the retailers may face in the near future is to how they can possibly integrate smart phones in their smart shops for the mutual benefit of retailers as well as shoppers.



# IFF EXCLUSIVE

## MARQUEE INTERNATIONAL SPEAKER'S KEYNOTE: THE FUTURE OF WEARABLE TECHNOLOGY

KAVINA MEHTA, NIHARIKA DAHAKE, NIFT, MUMBAI; AND AMRUTHA MADHUSUDANAN,  
PALAK SHAH, PEARL ACADEMY.



**Billie Whitehouse,**  
Co-Founder, Wearable Experiments; Innovator  
Designer and Creator, FUNDAWEAR

Featuring the “Elon Musk” of fashion, Billie Whitehouse, this IFF Exclusive keynote was among the most anticipated session of the entire event.

For the uninitiated, Billie is an innovative designer, fashion educator, stylist, creative director and is the designer and creator of FUNDAWEAR, and also the co-founder of Wearable Experiments (We:eX). Billie was brought up in the design industry and started working from the early age of 16 at Australia’s leading tertiary design school, Whitehouse Institute of Design.

Having worked in 3D printing solutions and also gaining the experience of software solutions, Billie connected the dots between hardware and software and founded We:eX, a socially driven wearable technology company. Their mission is to bring together fashion and technology with a functional design aesthetic, and use creative problem solving to help people

live well and have a better quality of life. As a director and designer, Billie is invigorating the fashion industry and transforming it into a business focused on improving the quality of the lives of consumers. We:eX won the ‘Best Fan Engagement Award’ in 2014 for the alert shirt.

As a garment engineer, Billie strongly believes that people should not look like the technology that they have grown to love and depend on. She believes that clothes are an untapped resource that, together with technology, can help people stay more connected and use their fashion in a more practical way.

She started with talking about her creation Nagivate, a jacket that navigates the wearer utilizing GPS tactile systems built into its sleeves and shoulders. Released in 2014, it works by downloading an app to your smartphone and plugging in your destination. Once the jacket and the app are synced,

### ABOUT BILLIE

// Billie and her partner Moir’s first joint project was a promotion for Durex called “Fundawear,” underwear with vibrators in them that are controlled via mobile app. Fundawear succeeded, bringing in more than 8 million YouTube views and 55,000 purchase requests.

// Wearable Experiments (We:eX) is a socially driven wearable technology company with a mission to bring together fashion and technology with a functional design aesthetic, and use creative problem solving to help consumers live well and have a better quality of life.

// Her mother heads up a school for designers in Sydney, so fashion is in her blood. A native of Sydney, she now splits her time between NYC and the land Down Under.

// Sumeet Shah of Brand Foundry Ventures called her the “the female Elon Musk.” More accurately, she’s the “Elon Musk” of fashion.

// She is an aesthetic specialist with a naturally inquisitive nature towards technology and innovation. As a garment engineer, she strongly believes people should not look like the technology that they have grown to love and depend on.

hardware embedded in the garment vibrates when you need to turn left or right. The vibrations change in intensity depending on how far in each direction you need to turn. At the end of the day the jacket needs to be hanged on the hanger and it gets automatically charged. As of now, it is a city specific jacket (Sydney, Paris, New York and London) and it gives the wearer the ability to walk around a city unimpeded by a map or an app.

She also revealed her latest experiment Nadi-smart posture correcting tights designed to improve form and flow in the wearer using haptic vibrations and smartphone technology. Nadi turns the user's skin into an interface. By sending pulses of varying frequency and intensity, the tights help to correct the wearer's posture and form while they perfect their yoga technique. It will come with both Android and IOS compatible apps, which will demonstrate the areas on the body needed for adjustment. The app also offers recommended poses, and illustrates guidance on correct alignments and posture.

Following this, a video projection of We:eX's fan jersey with Fox Sports, the Fox Alert Shirt was staged to help people understand and know the product better.

"Alert Shirt," she said, "enables you to feel the rush of the game. It helps you become a part of the excitement as every major play reverberates on your skin. It is connected through the phone via Bluetooth and lets you receive real time haptic vibrations, so that, one can feel the excitement of every highlight in the game. The experience creates a fan to team connection unlike anything ever seen before - putting the user front and center with the game." The shirt amplifies the experience through its power to connect, bringing a fourth dimension of entertainment to the thrill of game day. Using haptic vibrations, the shirt communicates when there are interceptions, turn overs, touchdowns, fumbles from the team. The shirt takes the sporting experience to the next level. For example, if a player is about to kick a field goal, they might be feeling nervous. The shirt might use the real-time data to predict that nervous feeling and tighten the material around the wearer to emulate the sensation. The Alert Shirt is designed for fans, so they can feel like they're a part of the game and a little bit closer to feeling like they're in the team. "Your favorite fan jersey just got technical. Alert Shirt is completely unlike any other jersey in the sports market," she said.

With the newly launched Alert Shirt, We:eX weaves hardware, software and apparel design together with real-time sports data, which is transmitted via a smart phone app to the electronics within the jersey. The Alert Shirt then converts the data into powerful sensations that simulate live sports action.

She stressed that consumer comes first and it's all about maximizing and enhancing the consumer experience. On being asked about the price range of the jersey, she said that the price per piece is around \$200.

Talking about future prospects, she mentioned that the market for female hygiene in case of wearable tech is huge, so they may come up with something new in this segment. They also have their eyes on the swimwear segment.

On being asked if she would prefer an online retail or offline, she said that the medium of retailing isn't important to her because the Alert Shirt doesn't belong on the rack with any other jersey.

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## CUTTING-EDGE INNOVATION

// Billie believes that she can give intelligence and purpose to what humans wear. Her designs are sharp, experimental, naturally confident and subtly feminine in appearance integrating the latest technology. Design principals of colour, line, shape, proportion, tone, silhouette and texture are being brought to the wearable technology industry by her.

// Her signature aesthetic of sharp, experimental, naturally confident and subtly feminine designs was clear from her first collection for the Pink Gala Breast Cancer Ball held at the Sydney Opera House in 2008. She was interviewed by Channel 9 for the 12-piece collection, which was a collaboration with Cerrone Jewellery and sponsored by the Australian Wool Innovators.

// Her creations have included everything from Navigate, a GPS-enabled blazer, to The Alert Shirt, a sports jersey that lets fans feel sensations tied to sports games.

// In April 2014, Wearable Experiments released the New York Navigate before the PSFK audience, a GPS jacket that nudges the wearer to direct them left or right. This city-specific jacket gives the wearer the ability to walk around a city unimpeded by a map or app.

## AWARDS & RECOGNITION

// Billie has been recognised for her work on FUNDAWEAR, with the campaign receiving a Silver Lion at Cannes Lions International Festival of Creativity.

// Business Insider recently named Billie as one of the 30 most important women under 30 in tech.

// In 2014, Billie won the Best Fan Engagement Award for the work on the Alert Shirt with FOX SPORTS.

// Most recently, Billie has been doing design workshop and keynotes worldwide, some highlights include The TEI Conference at Stanford University, Cannes Lions 2015, WorldWEDForum Zurich, Wired Retail UK 2015, Financial Times Event Conference, New York and WT Conference, San Francisco.

# SEAMLESS EXPERIENCE OMNI-CHANNEL CONCLAVE: THE FUTURE IS OMNI-CHANNEL: REVOLUTIONISING THE RETAIL EXPERIENCE THROUGH SMART PAYMENT SYSTEM

AASTHA TANDON, NIFT, MUMBAI.



An exclusive conference on revolutionising retail through the uniqueness of omni-channel retail, the conference stayed focused on touch points like the importance of data, the challenges being faced by retailers and brands and omni-channel strategies being construed as a remedy, in the one hour that it commenced. The session began with a presentation by Nimish Shah from Atom Technologies Limited. He introduced Atom Technologies as being the gateway platform for accepting credit/ debit cards, and being in every way, the “payment solution for every business”. Operating through 12 offices all over India, Atom also caters to revenue booster like Email invoicing, Discount Module, Dynamic Routing, Standing instructions on card, Multibank EMI and Express checkout. These boosters help merchants to bring customers at various platforms.

He took everyone through evolution of the internet to mobile internet and various types of internet banking modules and features like the ubiquitous IMPS, which can also be initiated through mobile even for banks without net banking facilities. Shah also spoke in depth about each revenue booster starting with Email Invoicing which enables the merchants to directly send payment link on the registered email id of the customers if the customers are not able to make transaction on the website. Dynamic routing enables routers to select paths according to real-time logical network layout changes. Standing

instructions on card enables the merchant to collect payments on monthly EMI basis while a multi bank EMI enables the merchants to offer installments to the customers.

With Atom Technologies bringing in the knowledge of payment gateways along with their own exemplary performance as an example, a round of introductions commenced amidst the gathered panel that looked forward to formulating key points about the importance, challenges, and opportunities of retailers and brands in 2016; the settling in and growth of the omni-channel environment; and the investment of omni-channel strategies in newer, reliable and more secure ways in the revolutionising payment channel.

The moderator, Dewang Neralla, Director, Atom Technologies, asked the panellists to share their views on omni-channel. The panel had different viewpoints, but largely agreed that technology has improved the lifestyle of customer and efficiency of business and omni-channel can be the key solution for retailers and business to behave seamlessly. “It is more than technology”, quoted one of the panellists.

Sandeep Mukim, CEO, Proline, discussed how 2016 oversaw technology’s strong foothold in the industry, way too intricately past every hurdle. It has improved life, in terms of increasing accessibility leading to ever increasing efficiency. The comfort point of the consumer has become a driving force.

Sanjay Roy, Executive Director, Puma, offered an insight into Puma’s functioning while being, “a perfectly large company available



L to R: Abhishek Ranjan and Sandeep Mukim. Pooran Jaiswal, Ojas Nishar, Huzefa Merchant, Dewang Neralla, Sandeep Mistry, Furquan Ali, and Arvind Saraf.

***Email Invoicing enables the merchants to directly send payment link on the registered email id of the customers if the customers are not able to make transaction on the website. Dynamic routing enables routers to select paths according to real-time logical network layout changes.***



across various forums.” He admitted to the firm having experienced a loss of traffic at their exclusive stores with the parallel online market doing extremely well. The price conscious consumer never wanted to pay more. The idea to create a balance was to try convert the online traffic by giving a similar purpose to the offline, i.e. by offering a single view of the inventory. Forward integration could have merged the offline and the online and also helped the customer switch. He further elaborated on the example of any customer buying the wrong sized shoe and not having to go back to the store by using the online channel. The switch between the two, made a cosy bed for the consumer who could avoid the inconvenience of parking a vehicle in a mall, looking for the store, and other similar inconveniences. He insinuated that the point of sale conversion did not really matter for viewing the offline and online as one channel was the ultimate criterion to make that conversion occur.

“Omni-channel is buying anytime, anywhere,” exclaimed Sandeep Mistry, IT Head, Aditya Birla Fashion and Retail (Pantaloons). As per him, the exchange point triggered by any of the website, blogs, or social networking pages

did not matter. The objective, on the other hand, had to be to not replicate the experience. The history of the point of sale systems showcases that they have not really undergone any change for the past ten years, but with evolving technology and ways, i.e., with online channels being the broader picture of the day, the change in POS systems has to be almost quarterly or maybe, twice a year. Nimish Shah refocused on the fact that they were not as big yet and hence required a step by step route to achieve targets. “Omni-channel was and is indeed a very different experience and would therefore require a gradual, consistent growth,” he said.

The difference and importance of both brick and mortar and online is huge and product specific to a certain extent. For instance, ethnic wear in India is basically brick and mortar and would take time making a considerable shift towards online. The consumer, in general, needs to be made to feel the transition to highlight the convenience of omni-channel.

The panel concluded on a wish list exchange keeping a to-be revolution for the next two-five years in mind. Pooran Jaiswal, CTO, Globus

***The price conscious consumer never wants to pay more. The idea to create a balance was to try convert the online traffic by giving a similar purpose to the offline, i.e., by offering a single view of the inventory.***

Stores, wished for not too many wallets clouding the payment scenario, but having a machine that could accept payments in any form. Sandeep Mukim wished for a similar all-in-one format while being sure of taking the next step by letting the consumer first get habitual of the existing payment methods. Sandeep Mistry desired for a method to cut down on the time invested in checking out and paying, which, according to him, consumes upto 30-35 percent of the entire shopping time. Huzefa Merchant talked of revolutionising the store by having no cash desks at all. The billing should be at the shelf if the consumer decides upon a product. As per the technology required to make the shelf a point of sale location, he said, “We already have something similar in store for us and we are close to making it happen.”

While Sanjay Roy wished for an Aladdin’s lamp to make the retail space grow, Arvind Saraf, Director, Triveni Ethnics, wished for all data to be on one platform with omni-channel setup in the picture, with making billing easy, quick and unnoticeable. The session was concluded by Sandeep Mukim, who stating that omni-channel had to just come true. It would be in all terms truly “brilliant”.



# OPEN THOUGHT

## FASHION- AN EXCELLENT INVESTMENT OPPORTUNITY

SHINJINI SAHA, NIFT, MUMBAI; AND RADHIKA BANSAL, PEARL ACADEMY, MUMBAI.

**F**ashion is the biggest sector within organised retail with over 30 percent share and is growing at a CAGR of 15 percent. The entry of leading global retailers and introduction to fast fashion is emerging and fueling the aspirations of Indian consumers. This is a golden opportunity for both investors and investees to put in their hands together and build something impeccable.

The conference focused on how a range of investment opportunities can be sought in fashion retail and the investors and investees can build strong partnership further than financial deal and stay collectively for long term returns in the market. According to the investor's point of view, there are three key points to keep under consideration. **Firstly, witness the colour of the money; secondly, in what type of bag the money is coming in; and lastly, who is carrying that money?**

The discussion kicked off with Kimaya Luxury's Chairman and Founder, Pradeep Hirani's overview of the fashion business today. Having started Kimaya Luxury 14 years ago, Hirani still finds himself as excited about the business as ever. "The industry has evolved, of course, over the past fourteen years. Today, the industry works at a rapid

pace and to succeed in this business, you have to stand on your toenails," he said. He also admires the dynamism that drives the industry. He discussed how luxury brands in India took the opportunity in the scattered market and grabbed the first occasion to outshine in the market. In the fashion industry, every day is a new challenge. However, the major challenge draws down to execution. Opportunity and growth in the Indian market could be immense, but the challenge is how well you execute your plan.

Hirani acknowledges that the past two years haven't been that impressive for the fashion industry, but remains optimistic saying that this lull is akin to the calm before the storm.

Shailesh Chaturvedi, CEO, Tommy Hilfiger India, when asked about the future of the fashion sector, quipped that though opportunities in this sector are immense, there is too much of focus on opportunities and not enough on execution. Instead of only looking at the opportunities available, there should be equal importance given to how to execute that opportunity. Execution standards in India are weak and still in its infancy stage.

VT Bharadwaj, MD and Partner, Sequoia Capital, seconded Chaturvedi's views saying that there is more time spent on talking about opportunities and not enough on how to

succeed in the business. It must be realised that the challenge doesn't lie in opportunities or in the market size, but in execution and building a really high quality business. Investors are now beginning to see better executions.

He continued that the mantra to excel in this sector is getting the combination of identifying and predicting what the customers want, correctly. "Plus, one needs to handle the back-end of the company, i.e., inventory, raw material, finance, etc., efficiently too. As the new era of online business is growing, it is serving the organised retailers with better prediction ability and managing lower inventory. Hence, a balance between the front-end and back-end is utmost important to survive and make profits," he said.





L to R: Shailesh Chaturvedi, Pradeep Hirani, Sunjay Guleria, Harminder Sahni and VT Bharadwaj.

***The biggest mistake one can make in the fashion industry, according to Bhardwaj, is chasing mindless growth. At the end of the day, even fashion is a balanced sheet based business and should be approached with the seriousness of an accountant.***

As we foresee, the penetration of organized retail is accelerating, even in tier - II and - III cities, because of the changing demographics of India's population and a healthy rate of economic growth. The investors are trying to take a slight back road now by focusing on the new 2Ps of the market which are People and Process. Initially, the 4Ps - Product, Price, Place and Promotion were highlighted ones but with good underlying economic growth, increase in disposable income, increase in awareness due to penetration of broadband and mobile devices with internet accessibility, the demand for consumer goods is rising, which makes consumers a lot more smarter and knowledgeable about the market. Hence, there is a need to prioritise them and with better systems and processes in place, all this is bound to facilitate a boost in penetration of the organized retail sector in India.

The biggest mistake one can make in the fashion industry, according to Bhardwaj, is chasing mindless growth. At the end of the day, even fashion is a balanced sheet based business and should be approached with the seriousness of an accountant. The important thing to remember is that the industry requires patience, understanding the business and understanding the consumer.

Echoing Bhardwaj's thoughts on looking past mindless growth was Everstone Capital Advisors' MD, Deep Mishra. He believes that real success lies in selling through situations. Further, he stresses that there are 3 Ps from the 6P Marketing Mix Model (Product, Price, Place, Promotion, People, and Processes) that form the basis of fashion businesses — people, processes



L to R: Shailesh Chaturvedi, Harminder Sahni, Pradeep Hirani, VT Bharadwaj, Sunjay Guleria and Deep Mishra.

and product. However, he rates India and Indian personnel a skeptical 3/10 when it comes to handling fashion. “About 70 percent of the promoters treat this area as a lifestyle, and not as a business. It is the image and glamour that drives people into this sector, not the business aspect of it,” he expressed.

Sanjay Guleria from Exclusively.com, invoked the 6P marketing mix model as well, adding another two Ps: Partners and Passion. Both are integral in cultivating a high quality business. Guleria advised to pick the business’ early founding team very carefully. On that note, investors must be considered akin to partners, and therefore must be picked extremely carefully as well. Next comes passion, and going hand in hand with passion, is perseverance. “Perseverance,” he said, “has been the biggest learning from his time in the business. Stay true to your own gut instinct amidst others’ opinions. Don’t get carried away with growth. As a business person, let your work be your passion, and let it consume you.”

Reiterating Guleria’s advice about investors, Shailesh Chaturvedi talked about Hilfiger’s experience with investors. Speaking about the Arvind Murjani Group in particular, Chaturvedi expressed his relief to have investors who are seasoned industry experts, well-versed with the

industry’s nuances. Investors, being well acquainted with the industry, allows them to be supportive and understanding, giving the company that much required wiggle room.

Harminder Sahni, Founder and MD, Wazir Advisors, switches to the investor perspective, by asking Deep Mishra about the extent of involvement entrepreneurs are allowed, before it is considered as interference. Mishra responded that it is extremely important for the investor to choose the right partner, and then to give them a very long leash. Interfering, he said, is done with the knowledge that investors are practitioners as well. However, if the topic of “interference” does come up, it’s a clear indication that the partner was not wisely chosen. V.T. Bhardwaj added to this, saying that investors think of themselves as the entrepreneurs behind the entrepreneurs. Regardless of ownership, investors must maintain the mindset of a minority stakeholder, and trust the entrepreneur enough to build up the brand. For this reason, it is very important and useful to have an investor who understands the business. Metrics differ from industry to industry, and are very different in the fashion business. These metrics should be understood by investors, lest they advise you incorrectly. For young entrepreneurs, it is all the more important to pick investors who can give them the right counsel.

Pradeep Hirani, too, talked about his experience with investors, saying synergy

between investors and the companies is the core to a healthy relationship between the two. Companies should invite investors to help and mentor, and involve them in the company as much as possible. The aim should be to build more of a partnership, rather than a financial relationship. Hirani also had a piece of advice for potential investees - expectations to be relayed to the investor can’t be a financial number or projection alone. Financial projects aren’t reality. Expectations can always and should be reset when things go south. Also, establishing a sense of comfort with the investor is the key. Entrepreneurs should take their time in thoroughly getting to know the potential investors and their portfolios. That, along with transparency, communication and involvement will ensure a healthy investor-investee relationship.

Deep Mishra added that communication with your investor is paramount, especially when things start heading south. Investees shouldn’t try to brush secrets under the rug for fear of what people will say, because that’s where the investor’s trust is lost. VT Bhardwaj supplemented the notion, saying that investors know businesses, and that ups and downs are a part of every business. So investees should communicate, even go so far as to overcommunicate, because investors realise that things don’t always go as planned and they’re okay with it.

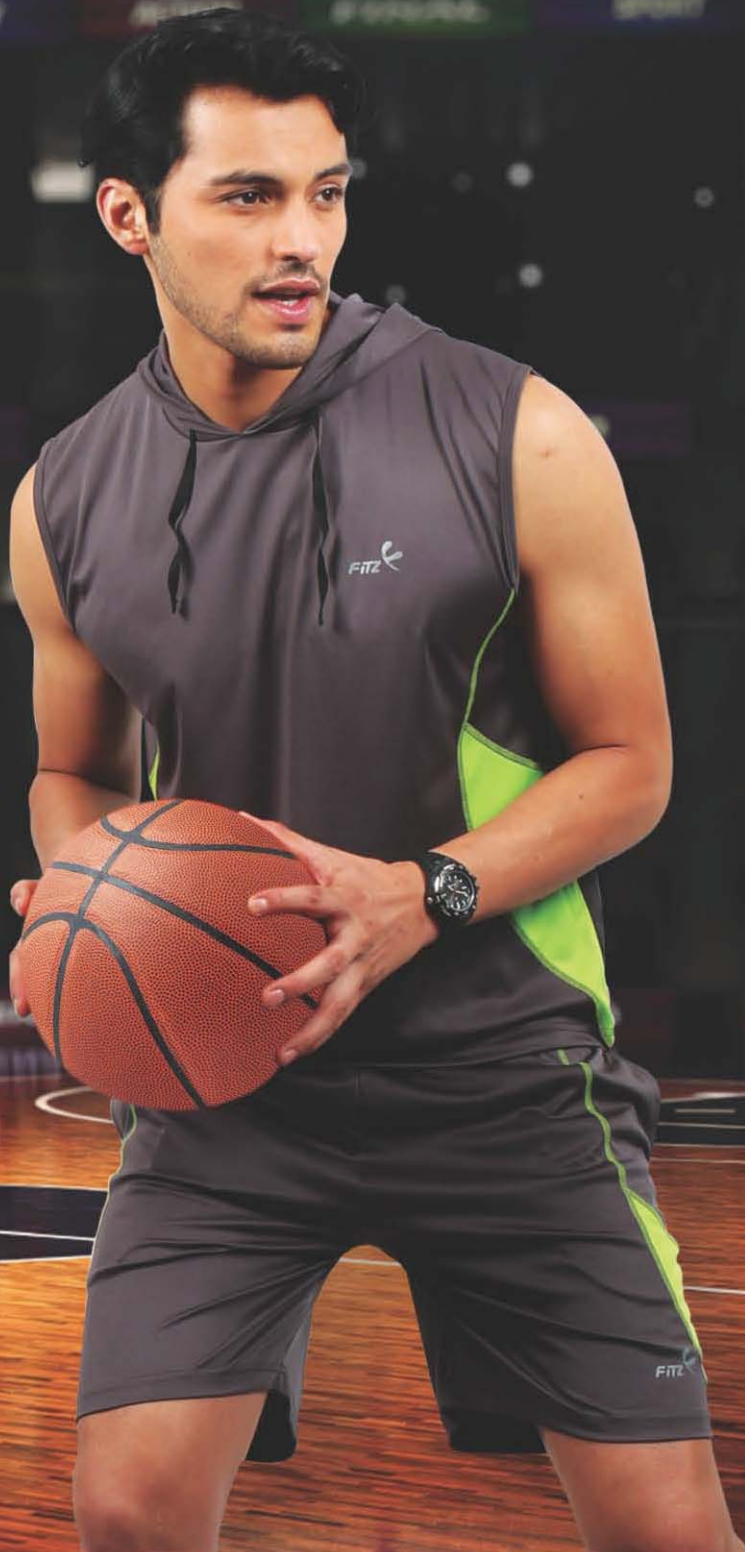




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L to R: Jennifer Kapasi, Varun Sharma, Sudhir Gupta, Agnes Kubiak and Kishore Bhatia.

## SOURCING AND DESIGN CONCLAVE: CREATING THE SOUL OF FASHION

NIHARIKA, NIIFT, MUMBAI; AND AMRUTHA MADHUSUDANAN, PEARL ACADEMY, MUMBAI.

While each manufacturer and fashion creator wants to build their own niche and differentiated product and designs, how can the entire industry come together as one to build collective intelligence and design sensibilities which will make Indian products world-class in quality, and cost-effective in sourcing ingredients from the different supply chains and global vendors. This intelligent resourcing session brought together designers, heads of leading apparel manufacturers, creative heads and sourcing experts to talk about building sourcing parameters, creating supply chains, and getting more into the process of creating fashion products as they gauge the fashion intelligence and trends in the market.

Moderated by Prem Sadhwani, Group Head, Product Development, Madura Fashion and Lifestyle, the conference included panellists

Agnes Kubiak, Co-Founder and Creative Director, Style-Vision, Paris; Anupreet Bhui, Senior Editor, Street-Style and Trend Specialist from Hong Kong, WGSN; Jennifer Kapasi, Head of Operations, Triumph International; Kishore Bhatia, Director - Product, Raymond; Nihal Ranjan, VP and Head of Design - MFB, Myntra Designs; Sudhir Gupta, General Manager - Buying, Merchandising and Sourcing, ITC Lifestyle and Vinesh Singh, Head- Product, Finance and SCM, Roush.

Kicking off the session, Prem Sadhwani, Group Head - Product Development, Madura Fashion and Lifestyle asked the panellists, **"How new product are finding its way every couple of weeks into the market via our retailers? Also, how important it is for brands and the retailers to be on toes to adapt to the change?"**

Anupreet Bhui stated, "It becomes very important for every retailer/brand to know how much one needs to change and where to stop or keep continuing. One must filter

the noise from the signal. The consumer is evolving to the technological aspect, so this expression must be accepted by the brands too. Being rooted from a trend forecasting website, they bring the ingredients to the retailers but they must realise what to cook with them."

Agnes quoted that it is not easy to change as one says, but after all, it is us who define the simplicity of change by participating into fast fashion. When approaching a certain trend, brands need to be aware of how to adapt according to the brand's identity. It becomes easier to prepare a new line or add changes when one has clear knowledge of brand's identity, and when global trends need to be scattered into Indian followers.

Jennifer Kapasi shared three factors before laying the change in the market — the brand, the consumer and the retailer. "You can then use that knowledge within your business. But first make sure that you understand whether the information applies to you, and whether you'll be able to implement it," she said. She



L to R: Prem Sadhwani, Vinesh Singh, Anupreet Bhui and Nihal Rajan.

cited the example of her own brand, Triumph, who needed to study the Indian consumers before setting their foot in India, as not all global trends were accepted willingly in India. “So,” she said, “its necessary to sense the impulse. What is working well globally might not prove to be a success in India. These are the rules of the game.”

Sudhir Gupta added, “A new product development is not just a singular function but has several back-end processes involved with it. The planners, the designers, the developers are the bogies of a supply chain. Brands like Zara, H&M and Hugo Boss, which are much in the picture of sea changing trends, usually have an available back-up response to fast changing fashion. The supply chain manages the seasonal issues arising within these brands and here lies the key USP for them.”

Kishore Bhatia produced the ideation for product development focusing on the approach of concentrating delivery into the market. Historical performances are necessary to create new product features and this being a continuous exercise for world-class innovations, collaborates with functioning of supply chain simultaneously. A new product needs to be in the pipeline every two weeks for successful adaptation to trends, depending upon the brand positioning.

Vinesh Singh, on asked if the competitor brand makes a first move in launching the same product, quipped that every retailers faces this situation once in their brand’s career. “It is necessary to prefer a second-mover or follow-up strategy to wait until the market becomes familiar with the product features and launches the same product with new renovations. This strategy protects against a negative reaction that may result from the product version offered by the first-mover,” he said. Also, effective timing is critical to attract customers and optimizing revenue and profit on a new product. “To attract the most customers and generate the most revenue, you want your product launch to time perfectly to the point when the marketplace is most anxious for the features and benefits offered. If you launch too early, customers may not be ready to understand the value. Launch it too late, and you may miss the point at which customers want the benefits offered,” he added.

Adding to his very concept of timings, Varun shared an example of how a product (wallet) carved in many functionalities failed consumer acceptance. Figuring out the reasons for the same, he said, “Maybe the

crowd wasn’t well communicated about the product and surely the timing was dicing.

Nihal Rajan was asked about his take on communication for online products and how trends could be followed. He said, “More and more online businesses are finding new ways to market themselves in an attempt to be a cut above the rest. If you don’t try to keep a competitive edge, you will fall behind in generating more traffic to your site. Be aware of what’s changing. But it’s one thing to know that things are changing, and an entirely a different thing to engage with the changes and figure out how to use them to your advantage. There’s no reason that you can’t be the one that comes up with an innovative, new way to use the technology that’s available. A lot of companies are now implementing blogs on their websites, offering tips and advice for their area of expertise; this is a sure-fire way to communicate with the customers.”

Vinesh Singh concluded the session, stating that the last decade witnessed three fold more changes than was expected and rapid developments in technology has brought along new challenges, urging an immediate restructuring of all business format.



# OPEN THOUGHT PREMIUM LOUNGE CONCLAVE: GROWING THE ESSENCE OF PRIVILEGE AND CASUAL LUXURY – CURATING LIFETSYLES OF THE AFFLUENT CONSUMER

KAVINA MEHTA, NIFT, MUMBAI; AND  
MADHURA DALVI, PEARL ACADEMY,  
MUMBAI.

**A**mong bloggers, online magazines, and those-in-the-know, the real trendsetting news is that fashion is no longer about just the clothing and accessories- it's about a lifestyle. It goes beyond simple clothing to express identity, create wellbeing, embrace creativity and connect global communities. There is a strong appreciation for design as a whole, and for custom looks. It's curated and it's personal, offering the idea of discovery, of something new, and with a strong focus on fashion. The luxury retail business in 2014 was at ₹10 billion and is predicted to reach ₹100 billion by 2020. With the boom in the fashion sector, it has become increasingly important to understand the evolution of the luxury sector.

The most awaited seminar of the evening, on privilege and casual luxury, took place with a star studded panel and a full house.

**How do the premium and luxury brands, retailers and designers see the focus on growing this segment, and how are they wooing the Indian consumer to upgrade to a premium lifestyle, were the focus topic for the session.** Moderator Siddhant Rana, Head of Fashion, Exclusively.com, began the session by questioning the panelist's take on the evolution of luxury fashion in India.

According to veteran designer Neeta Lulla, initially there wasn't much awareness about luxury products beyond the big canvas, Bollywood. But gradually, it created a huge aura of aspiration amongst the consumers. While the 80s was about replicating outfits



Designers Falguni and Shane Peacock, Neeta Lulla, Nikhil Thampi, Payal Singhal, Rocky S, and Saudamini Mattu representing Abu Jani and Sandeep Khosla with stylist Ami Patel and representatives from Exclusively.com, 1908 E-ventures, Trumount Cosmoceuticals, Forest Essentials, AM:PM, Victorinox.

off the big screen, the 90s witnessed conscious consumers roping in celebrity designers and getting made-to-measure outfits that suited their style and personality. In the past few years, the advent of social media, advertisements and blogs have provided inroads to luxury fashion in India. Is it design aspirations, price power or super speciality products? Neeta stressed that it is the easy access to luxury, growing aspirations of people to possess things others have, increased disposable income and an increase in the spending capacity that has led to the boom in luxury products.

Saugato Banerjee, Vice President- Brand Alliance, Victorinox, then highlighted how

15 years, back travel bags and luggage were only VIP, whereas now, consumers want to possess only designer or luxurious bags. He said that there is a trend amongst consumers to own products that have a legacy, heritage or history attached, and that is exactly what their 132 year old company provides. "Year on year an increased acceptance of brands and their price points has been observed," he said. Sudhir Tripathi, Director General, of NIFT spoke about how they are trying to mimic the evolution of the industry into academic offerings for their students. He also mentioned that through market research they are trying to bridge the gap between arts and crafts heritage and the requirements of the market. He mentioned that NIFT has

**Consumers purchasing knock offs actually aspire to possess the real product. Copies basically create awareness for the actual product and once people have the resources, they will purchase the original one.**

15 campuses and has an annual intake of 3000 students annually if it is successfully integrated, it will be a boon

Designer Nikhil Thampi said that it was his sheer love for Bollywood that brought him into the field of fashion. He mentioned that although Indian fashion was typographed as being traditional, luxury in India has always been in the forefront, it's just that in the recent times, it has come to the limelight.

Eminent designer Rocky S, concurred with Thampi and stressed on the fact that India has always been luxurious — from the palaces to the rich fabrics, to the elaborate wardrobes of the maharajas and maharanis, it has been a true heritage of luxury. He said that since the past 3-5 years people have become more accepting of fashion and also it has become more accessible because of online sites like Exclusively.com. This gives designers like them a medium to sell luxurious products to different parts of the world.

Designer Payal Singhal agreed with Rocky and continued further that luxury is a relative concept. "For me, India is luxurious. Awareness is what is new as compared to the past and platforms like Exclusively.com give an opportunity for luxury to be accessible to the growing demands of luxurious products in India. The main question is how to connect the experience of a brick and mortar to a digital platform," she said.

Priyanka Modi, Owner and Lead Designer, AM:PM, also agreed about the luxurious heritage of India and continued that luxury and fashion have come a long way with social media

exposure, growth and increased accessibility. She mentioned that 40 percent of the income of big companies is because of luxury products. About 55 percent of the online sales are because of the young generation and the market for luxury is fast expanding. A decade back, people put in a lot of thought before purchasing a luxury product. However, today, the purchases are more on impulse and there is a quick conversion of consumer aspiration into consumption.

Renowned jewel couturier Mrinalini Chandra said that according to her, luxury is the value of craftsmanship. It is the ability of acquiring and wearing something from unique parts of the world.

Deep Lalwani, Promoter and Director, Ador Group & Co – Founder, 1908 E-ventures, then took the discussion to perfumes and cosmetics. He said that today skin and health care add value to personal appearance. Men put around 5-8 products a day whereas women put around 8-15 products a day. In the last 10 years, more brands have entered the market creating more exposure.

Jaideep Khurana, CEO, Trumount Cosmoceuticals, said that it was after 7 years of research in the field of skincare, beauty and health that they rolled out their company, Trumount Cosmoceuticals, in the market. Their main focus is on packaging and quality to attract customers and position themselves as a luxury brand. They are one of the three companies in India to have a certification from BUAV London for humane cosmetic standards. As also stressed by other designers, he stated that the digital blast is very encouraging for the entrepreneurs and new brands entering the market. Supporting him was Rishi Sen, CEO, Myenvybox, who went ahead to say that the only platform to promote luxury in India is online. Celebrity stylist, Ami Patel, started off by saying that India has always been a pioneer in luxury. She mentioned how the fashion bloggers brought about a great change in the fashion industry and she eagerly awaits to witness the next big thing in fashion. Sanjay Guleria, shared that the inability to access luxury from India lead to the start of Exclusively.com. He said that as

long as a product is represented properly, one can appreciate its value and workmanship.

On being asked about how luxury in the digital world can defend itself against the fast fashion brands like H&M and Zara, Payal Singhal, opined that to compete with these brands, one must stay ahead of the game by creating aspirational luxury with a shelf life of only 6 weeks as opposed to 3 to 6 months.

Neeta Lulla opined that imitation is the sincerest form of flattery. She continued by saying that there are people who are willing to pay for sheer luxury, whereas there are people who prefer knock-offs. Rishi Sen was of the similar opinion that consumers should be differentiated based on their preferences.

Ami Patel chipped in stating that consumers purchasing knock offs actually aspire to possess the real product. Copies basically create awareness for the actual product and once people have the resources, they will purchase the original one.

As a solution, Nikhil Thampi revealed that he wanted to make a brand that is more available to the masses. Keeping that in mind he launched an exclusive line with a 'sweet spot for pricing.' He is of the belief that if an original Nikhil Thampi can be affordable, people wouldn't opt for a fake one.

Next, Guleria spoke of how Exclusively.com is opening up the market for brands which don't have distribution channels to come to India. He said that some high end western brands have approached them and talks of launching them in India are in place. He mentioned that Exclusively.com eventually wants to venture into the lifestyle segment. He also mentioned that they are planning to launch an app in the near future.

The session ended with a discussion on the credible points considered by designers or brands when retailing through a third party website. Payal said that the interface of the website, aesthetics of the website, designers retailing through the website, customer service provided, etc., are some of the points that need to be considered.



# OPEN THOUGHT

## E-MALL TO OMNI-CHANNEL - SETTING THE STAGE FOR COLLABORATION SUCCESS

SHINJINI SAHA, AASTHA TANDON, NIFT, MUMBAI; AND PRIYANKA KABRA & RADHIKA BANSAL, PEARL ACADEMY, MUMBAI.

Time is evolving and so are the customers. Earlier, people were conservative even about readymade garments, and today, from malls and hypermarkets we have progressed to online and now omni-channel. The moderator, Harminder Sahni, Founder and MD, Wazir Advisors and the co-moderator, Berry Singh, COO, Ace Turtle, began the conference with a vivid description on how retail has morphed with time. As the discussion headed towards omni-channel retailing and its application in respective businesses, views seemed to clash. While some believed physical stores does not have a bright future some insisted on existence of physical and online stores together. The synergy between the two will be significant in the retail future. If the customer data mined and collected by online players could be used by offline retailers, it will help both the parties.

Kapil Bhatia, Fashion Business Head, Askmebazaar, said that at Askmebazaar.com, it is all about serving the needs of the consumer and how the brand is serving the connect. He feels that the retailers definitely

need to expand beyond the physical, and the synergy between online and offline should work out to serve the needs of the end consumer. Gurpreet Singh Boparai, MD, No Exit Clothing remarked that as of then, his brand sold only offline, but acknowledged how imperative it was to be operating online as well. Consumers are not and would not always be available to come to the stores, and that shouldn't translate into loss of sales. In his opinion, a synergy must be established to make for one complete experience for the consumer.

Ranjan Kant, CMO, Jabong, talked about the scepticism that first came when the concept of online retail was introduced. No one saw it coming then, but online retail has become a way of life so much so that people do make purchases in lakhs in online today. The physical stores need to stay as they drive the sales. But then, one must not underestimate the power of omni-channel retailing,

which must go beyond the discounts and sales towards data integration. One must understand in all clarity that despite the popularity of online retailing, physical stores are not going anywhere for the time being. They offer one major competitive advantage over online retailing and that is the option to try and buy. Online players, on the other hand, have customer data, and a lot of mining and interpretation takes place to translate it into a personalized experience for the consumer. Omni-channel is still limited right now, but it needs to go beyond and integrate data to optimize performances.

Sarvesh Dwivedi, Head-Lifestyle, Tata Unistore, was questioned about the eager wait of TATA Unistore's online presence. He delved on his team's philosophy to not differentiate between the offline and the online, but go with the need, to earn customer loyalty. They wish to create an ecosystem that complements the offline and utilised the leverage offered by their existing system.

Kinshu Sinha, Director, Flipkart says that consumer expectations are of utmost importance, and they need to be understood better. To understand them better, the companies need to get more information. Multichannel approaches will be different for different business models. On being asked if Flipkart would open an offline store like amazon, he elucidated on his "never say never" philosophy, while stating the advantages of moving from online to offline store.

"Business is all about products and profits", said Harminder Sahni. The consumers are obviously ready to buy anywhere but soon the questions why offline and why online would gain simplicity in their view. The offline would be great experience and the online would be great convenience. Both of the formats, offline as well as online have to just complement each other and not encounter them differently reporting a loss of sales.

Sarvesh Dwivedi quoted the successful Boots and ASOS merger that brought together their respective family of consumers as the youth and the ones looking for fast fashion. As per Berry Singh, 'Click and Collect' did work as a



Representatives from Askmebazaar, Flipkart, Voonik, Jabong, Tata Unistore, No Exit Clothing, Being Human, RMKV, SSIPL Retail, Ginesys, Sohum Shoppe, Ritu Wears Biglife, Saffron Lifestyle, Jade Blue and Yepme on stage.

***While Being Human was present across all verticals, one thing that bothered them in the online space was the discounts. The removal of discounts made the brand descend the popularity rankings, but surprisingly did not hinder their growth.***

concept in the UK, but the Indian consumers have been spoilt and pampered with the exclusive offer of free shipping. The rule is not to blindly compare and follow the western market but rather come up with indigenous ideas. The online explosion is a shift that the Indian consumer is still adapting to. Gurpreet Singh Boparai exclaimed that localising the market with the brands being offline and the private labels being online will disrupt the entire picture. The equation will have to be standardised for the consumer and made more uniform.

Yepme.com's Vivek Gaur said that online and offline, at the end of the day, are just touch points for consumers. He noted that 75 percent of people who have bought from them have never visited the stores. After building brands, the brands must build more distribution options. The offline should venture into online and vice versa. Kunal Mehta, VP - Marketing, Being Human said that while **Being Human was present across all verticals, one thing that bothered them in the online space was the discounts. The removal of discounts made the brand descend the popularity rankings, but**

**surprisingly did not hinder their growth. He reiterated the importance of omnichannel in the following words, "Build up a brand on both formats. Be a part of both. The marriage has to be adjusting."**

Berry Singh then asked the panellists to elucidate on the mobile 2.0 revolution and its impact on online retail. He reflected on the coming times wanting more of a handset interface than a desktop interface. The newer ways will have to offer a location based service to fulfil the ease factor. Social media shall have to be more engaging to connect the brand and the consumer. Vivek Gaur added that apps would be a highlight, with even more features. "It is a 40 percent wage now; it shall be 60-65 percent for us (our brand)", he said. He also revealed that they would soon have a new feature, 'Hot or not', where friends would also be able to view each other's list of hot products.

We are soon approaching a time where the more the consumer engages with any device, he/she wishes to know what

>



Onstage panel with representatives of Savemax Wholesale Club, Study By Janak, Options The Fashion Mall, Setu Etail, Akbarallys, Blue Tonic, Blue Club Collection join in for the session finale moment.

***The online store increased the number of required SKU's, and as for the offline store, the store staff needed to be retrained from the cultural point of view. The customer of today has indeed changed, and to serve that customer, one needs to adapt and get accustomed to grace the change.***

they want from the device itself, taking personalisation to a whole new level. Mobile 2.0 refers to the phones being a mix of influencers and enablers. To make the consumer connect go higher and deeper, the mobiles and the retail stores would have to be both equally powerful.

**Dharmesh Patel, Founder, Options Clothing, reported that if online retailers take up from offline, both could easily co-exist. But, if the discount culture continued, the affair could just not be. Offline and online must serve as extensions of each other. If digital and retail could blend together as the touchpoints in the customer's journey, the experience could be enhanced overall.**

Niranjana Viswanathan, Director, RMKV, on being questioned about evolving store reforms, said that she firstly wished for a sense of uniformity in policy and pricing. The online store increased the number of required SKU's, and as for the offline store, the store staff needed to be retrained from the cultural point of view. The customer of today has indeed changed, and to serve that customer, one needs to adapt and get accustomed to grace the change. Kinshu Sinha attributed the success of e-commerce to the current generation's comfort with the internet. His belief hinted at the next generation

being even more comfortable transacting through their phones rather than on computers. The obstacles in the online/offline integration can be best framed by the word 'Frenemy', i.e., they behave both as friends and enemies. They should both continue to gain from each other and go hand in hand. No format can be described as being trivial at any level. Offline needs to share both price and inventory with online. The data content, data feed and order management shall become the three steps towards an omnichannel data integration system. 'Vernacular' would be the truest way forward, with the retailers expanding their share of the market beyond all limitations. The omni-channel view shall bring about a single view of the inventory as well as a single view of the customer. All e-tailers will be part of the technology association. How the customer engages with the brand in the new environment shall be the turning point.

The session concluded with Kinshu Sinha, stating that, "discounting is the primary acquisition." Technology, data, and omni-channel influences shall gain momentum and own the stage, very soon. One needs to, by then, establish consistency at all costs. The consumer has evolved. The online future foresees 83 percent of the sales via the internet, but that is what paves the way to the new model. If the offline and the online merge, they shall transform, but shall co-exist and stay.

×





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# INDIA BRAND SHOW

## SHOWCASING THE LOOK OF THE SEASON



India Brand Show 2016 was held on the evening of 15th March 2016 at the Renaissance Hotel, Powai. The evening, which also was the finale of day one of the India Fashion Forum, witnessed the show which showcased the looks of the season and upcoming collections to the best of the retail world. Brands showcased their latest fashion offerings with style and panache with models and kids walking the ramp for various brands. India Brand Show provided a stylistic way of doing business along with reveling in style, glamour and zest by providing a look-book to the future of creative designs, fast fashion and creating a new wave of fashion culture. Change was seen dynamically in fashion, where established brands were re-inventing themselves and new brands were paving new ideas, creating new categories in fashion and bringing a fresh feel to the ramp through their new collections. It was all about creating the next wave of fashion consumption by forging new relationships between brands and retailers. The show had top honchos of the fashion industry in audience, keeping a close tab on the latest trends.

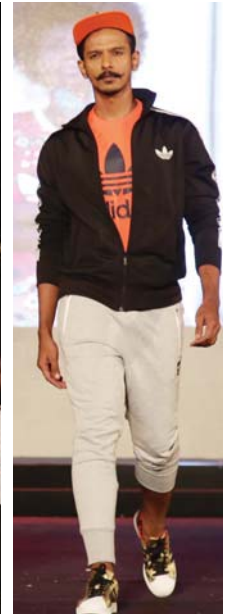


The brands that participated in the show included, *Adidas Originals, Celio, Skechers, Pepe Jeans, Lee Cooper, Tommy Hilfiger, Provogue Shoes, Vero Moda, Jack & Jones, Only, ID, Vitamins, Raymond- Fine Fabrics, Raymond- Ready To Wear, and Raymond-Made To Measure*. India Brand Show has been conceptualized, produced and directed by Images Group. The event was managed by IM Entertainment Pvt. Ltd. The show was choreographed by Vahbiz Mehta, the styling was by IM The Styling Company, and the stage management was handled by Suchi Mehta and Kamal Mehta. In sum, India Brand Show comprehensively showcased a look-book to the future of creative designs, fast fashion – from ramp to the store, and created a new wave of fashion culture.



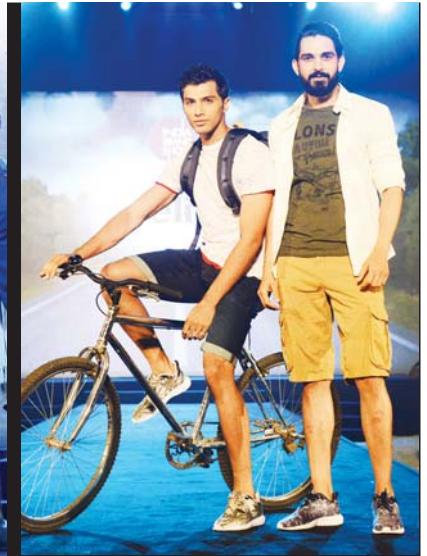
## ADIDAS: FUTURISTIC AND SPORTY FASHION

Adidas Originals showcased their summer 2016 collection at the India Brand Show 2016. The collection predominantly featured sportswear, while the feel was futuristic. The new range had something to cater to both male and female athletic wear needs and the collection included vests, shorts, cropped pants, sweatshirts, bags and other active wear. For colour scheme, the brand opted for neons, florals and spring influenced designs, which added an extra star to the show.



## CELIO: FRENCH FASHION FOR MAN

Celio, is a French menswear brand and is present across 1,000 stores in 60 countries. It carries the latest international range in India of casual wear, denim wear and smart work wear through its exclusive 40 standalone stores and 128 shop in shops in leading departmental stores. Celio's Spring-Summer 2016 collection is largely based on four primary themes: active, the French tricolour, denim-indigo and surfer boys.



## ID: RAW, RUGGED FOOTWEAR FOR MEN

A well-known Footwear Brand conceived in 1990 known for its products inspired by true form of nature. Through its muted beauty, the brand targets the young, stout-hearted souls who are dynamic, and have marked energy, confidence, smartness and boldness. The brand re-incarnated in 2014 with its immortal theme, "Profundity of Earthiness" with tag line "be the cult".



## JACK & JONES: SWEAT OVER COMFORT

JACK & JONES is a democratic jeans brand making it easy for fashion conscious men to create their own personal style. The four lines, ORIGINALS, VINTAGE, TECH and PREMIUM have different target groups and expressions design-wise. All the four brand-lines have trendy, relaxed and cool designs with super fits, offering great styles to young jeans freaks as well as grown up rebels. It currently has 63 stores and 181 shop-in-shops in India.



## LEE COOPER SHOES:

### THE URBAN WEAR

Currently present in over 100 countries, Lee Cooper is an iconic English fashion brand, originally established by Morris Cooper in the year 1908. It was in 1995 that M&B Footwear introduced Lee Cooper as a casual footwear brand in India. Lee Cooper presently offers products across several sub categories such as Dress Shoes, Casual, Comfort, Outdoor and Lifestyle Sports for both Men and Women.



## ONLY: FASHION FOR YOU

With a mission to denimize the world, ONLY is an authentic jeans brand for women. ONLY aims to transform the everyday life from grey and monotonous to fun, colorful and creatively eventful. The blood in our veins is indigo blue and denim is a constant state-of-mind. In effect, all ONLY collections reflect the denim attitude, look and image. ONLY India currently has 50 stores and 106 shop-in-shops spread across the country. The showcased Beach resort collection dungarees, dresses, plaid shirts, jumpsuits, jeans, etc.



## PEPE JEANS: SINCE 1989

Pepe Jeans London was launched in India in 1989. The brand flourished and continues to expand throughout the country, in sync with its global identity. Pepe Jeans showcases the most comprehensive and trendiest collection of denims and casual wear season on season. With the launch of the kidswear collection, Pepe Jeans now redefines fashion for the little ones too.



## PROVOGUE SHOES: MAKE YOUR MARK

Provogue, originally an apparel and accessories brand has always been seen as different from the rest of the pack of brands. Footwear being the most natural progression for a brand having an extensive presence in apparel, M&B took on the challenge of managing this category under an exclusive Licensing arrangement. Provogue's current brand statement "Make your Mark" projects the ultra bindas attitude of its target audience and reflects its cool brand imagery.



**RAYMOND:**  
FINE FABRICS, MADE TO  
MEASURE AND READY  
TO WEAR

For over 80 years, Raymond is counted as one of the world's premier manufacturers of worsted suiting fabric in fine grade wool, in the same league as the finest that Europe has to offer. Today, the Raymond product range includes pure wools, wool blended with exotic fibres like camel hair, cashmere and angora and innovative blends of wool with polyester, linen and silk. Raymond's domestic distribution is spread far and wide with more than 30,000 outlets that stock and sell our a range of fabrics. Raymond has the distinction of producing the finest suiting in the world using super fine wool from 80s to 250s count and blending the same with superfine polyester and other specialty fibres, like Cashmere, Angora, Alpaca, Pure Silk, Linen, etc.

The brand showcased its range of men's wear clothing at the India Brand Show. The highlights were the classy blazers, trousers and shirts. The styling was very urban sexual, with sharp fittings and styles. The colour scheme was summer friendly with lots of pastels, greys, whites and blues.



**SKECHERS:**  
FASHIONABLY  
ACTIVE

Founded in 1992, Skechers USA Inc. is one of the fastest-growing footwear companies in the United States with currently ranking only 2nd to Nike in the US. With sales surpassing over \$2 billion USD, Skechers designs, develops and markets more than 3,000 styles focusing on trendy, casual styles aimed primarily at men and women from the ages of 19 to 40 with bold, basic colours.





**TOMMY HILFINGER:  
CLASSY AMERICAN  
STYLE**

Tommy Hilfiger is one of the world's leading designer lifestyle brands and is internationally recognized for celebrating the essence of classic American cool style, featuring preppy designs with a twist. Tommy Hilfiger delivers premium styling, quality and value to consumers with a breadth of collections including men's, women's and children's sportswear, denim, accessories and footwear. In addition, the brand is licensed for fragrances, eyewear and watches.

**VERO MODA:  
BREEZY THIS SUMMER**

The story of one of Europe's largest clothing brand began in 1987, when Bestseller launched VERO MODA - a high quality clothing line with the latest looks at just the right price. Since its commencement, VERO MODA has become synonymous with contemporary fashion and designs, which young women across the world desire. VERO MODA India currently has 65 stores and 137 shop-in-shops spread across the country. The brand showcased beach inspired styles and light breezy wear. The range had long dresses, jackets, palazzos, tops, shorts and swimwear. The prints included aztec and floral prints with colour scheme ranging from whites and blues to earthy tones.



**VITAMINS:  
KIDS' BEACH DAY OUT  
AND MORE**

Vitamins, a lifestyle clothing brand from the house of Sangam Dresses Pvt. Ltd., laid its bearing in the year 2000. It caters to the fashion needs of kids aged 1-5 and 6-16 years. The brand today stands strong and continues to add hues and elegance to kidswear. The brand showcased its 'Summer Crush 2016' collection and presented a wide range of summer beach and casual wear for both little boys and girls.



## TRIPLE TRIUMPH FOR BENETTON AND RAYMOND AT **THE IMAGES FASHION AWARDS 2016**

The 16th Annual Images Fashion Awards (the IFAs) recognised the continuing evolution of dynamic, forward-looking brands at a glittering ceremony which was also the grand finale of the 16th edition of India Fashion Forum (IFF 2016) and was held on 16th March, 2016 at Hotel Renaissance, Powai. The 16th Annual IFAs were presented by Exclusively.com which also recognised India's finest designers. The event witnessed top honchos of the fashion industry, sharing some memorable moments and celebrating each other's successes.

The awards night also witnessed the launch of the India Business of Fashion Report, a comprehensive research comprising the latest trend and statistics. The book was launched by Kabir Lumba, Chairman, IFF and MD, Lifestyle International, Sudhir Tripathi, DG, NIFT and Amitabh Taneja, Chief Convener, India Fashion Forum & CMD, Images Group.

The night saw 10 Images Awards, 5 Design Concept Awards, and 6 Jury Awards being declared while Shailesh Chaturvedi, CEO, Tommy Hilfiger- India bagged the Images Most Admired Fashion Retail Professional of the Year Award. The evening of the Images Fashion Awards (IFA) 2016 was hosted by lovely looking Tisca Chopra, a well-known actress known for her works in Hindi cinema along with Manasi Scott who is a famous singer, song writer and an actress; and retail honcho Shailesh Chaturvedi, CEO, Tommy Hilfiger. The awards were a venerable gathering of virtually the who's who of the industry. A highlight of the night was stand-up comedian and actor Ash Chandler, who left the audience in splits with his great comic timing.

Exclusively.com also recognised some of the notable and upcoming designers during the Awards night, wherein Nikhil Thampi won the award for Most Promising Designer on Exclusively.com.



Grand Finale: "The winner takes its all" picture





Manasi Scott & Tisca Chopra



Kabir Lumba, Sudhir Tripathi and Amitabh Taneja launching the much awaited India Business of Fashion Report 2016



Manasi Scott enthralling the audience



Ash Chandler had the audience in splits

The Images Fashion Awards are adjudged on the basis of performance in operational benchmarks along with qualitative factors such as product and marketing innovation, social responsibility initiatives, HR practices and industry goodwill, among others. Due to their 360-degree evaluation process, the IFAs have come to be established as the premier recognition for fashion retailing excellence in India. The coveted IFA trophies were awarded to India's most forward-looking, innovative and exciting fashion brands, retailers and professionals for achievements in the year.

The process of deciding the winners begins with prospective nominees, submitting nominations with required details and supporting material. Nomination forms are then checked by the IFA audit team for eligibility, completeness and data correctness. The IFA team of analysts then make a presentation for the IFA jury – with analysis of performance metrics, such as growth in top line sales and retail presence, sales per square foot, average transaction values and profitability. A special note is prepared on innovativeness, marketing effectiveness, supplier relations and employee

practices. The IFA jury, which comprises distinguished personalities in the field of research and consulting, with vast experience and thorough insights in to the business of fashion, then goes through the presentation and gives scores based on their assessment of the nominees. The results of industry recommendations and jury score ultimately decides the final nominees. Jury and the organisers have the right to decide on the final categories to be awarded, renaming the titles and moving nominations to the most appropriate categories – whenever required.

The IFA Jury Members consists of industry experts, who had a tough time to select the winners from 81 nominations.

The jury members for the business awards included **Abheek Singhi, Sr. Partner & Director, Boston Consulting Group; Ankur Shiv Bhandari, MD, Asbicon & Kantar Retail India; Bijou Kurien, L Capital Asia; Debashish Mukherjee, Partner & Co Head, Cons & Retail Ind, AT Kearney; Deepak Pillai, Director, Retail & Merchandising, Nielsen; Harish Bijoor, CEO, Harish Bijoor Consultants; Lara Balsara Vajifdar, ED, Madison World; Piyush Kumar Sinha, IIM, Ahmedabad, Ravi Dhar, Yale School of Management; Sunil Alagh, Founder & Chairman, SKA Advisors; Zia Mody, AZB & Partners and Amitabh Taneja, Chief Convener, India Fashion Forum and CMD, Images Group.**

The jury for the design awards included **Agnes Kubiak, Partner & Creative Director, Style-Vision Asia; Anupreet Bhui, Sr. Editor-Street Style & WGSN Trend Specialist; Lara Balsara Vajifdar, ED, Madison World; Pradyumna Vyas, NID; Ritu Kumar, Fashion Designer; Sudhir Tripathi, DG, NIFT; Tarun Tahiliani, Fashion Designer; and Ritu Beri, Fashion Designer.**



**MOST ADMIRED  
FASHION BRAND OF THE YEAR:  
MEN'S WESTERNWEAR**

◀ **TOMMY HILFIGER**

*246 sales points and pan-India presence. Tommy Hilfiger added 36 stores and increased EBO space by 40,000 square feet last year. There was 17 percent sales growth and double digit same store sales growth. 12 stores with an average size of 2,000 square feet touched the magical 1 Crore mark during the year.*

Received by:  
Rajesh Kamble; Meet Parekh; Bharat Rishi; Mukund Bansal; Shefali Patel; Mandar Karnik; Shefali Patel; Kunwar Abhishek; Rohiet Singh and Sid Kapoor

Presented by:  
Sudhir Tripathi, Director General, NIFT;  
Kabir Lumba, MD, Lifestyle International and Chairman, IFF 2016



**NOMINEES:**

Being Human | Celio | Jack & Jones | Park Avenue  
| Raymond | Tommy Hilfiger | United Colors of  
Benetton

**MOST ADMIRED  
FASHION BRAND OF THE YEAR:  
WOMEN'S WESTERNWEAR**

**ONLY** ▶

*ONLY has 159 sales points including 49 EBOs and 106 shop-in-shops pan India. 50 sales points including 10 EBOs and 40 shop-in-shops were added last year. There was 73 percent sales growth and an incredible sell through of 90 percent!! The brand also retails through 9 online commerce platforms.*



**NOMINEES:**

ONLY | United Colors of Benetton | Vero Moda

Received by:  
Sahil Advani, Senior Digital Marketing Executive, Bestseller India

Presented by:  
Sudhir Tripathi, Director General, NIFT;  
Kabir Lumba, MD, Lifestyle International and Chairman, IFF 2016



Received by:  
Team Benetton  
Presented by:  
Mukesh Kumar, VP, Infinity Mall

**MOST ADMIRED FASHION  
BRAND OF THE YEAR:  
KIDSWEAR**

**UNITED COLORS  
OF BENETTON.**

*United Colors of Benetton has 786 sales points across India. In 2015, it had a retail space growth of 15 percent and increased 98,000 square feet in EBOs. There was 71 percent sales growth and 67 percent EBO sales growth.*



**NOMINEES:**  
612 League | Tommy Hilfiger | United Colors of Benetton | Vitamins

**IMAGES MOST ADMIRED  
FASHION BRAND OF THE YEAR:  
JEANS & CASUALWEAR**

**Pepe Jeans** ▶  
LONDON

*Pepe Jeans has 900 sales points across the country. 150 sales points were added in 2015, with 1 lakh 12 thousand square feet added to its EBO space. There was 43 percent brand sales growth and 71 percent EBO sales growth. Pepe Custom Studio, inviting customers to design their own denim in a few easy steps, was also launched last year.*



Received by:  
Manish Kapoor, VP Sales;  
Neha Shah, Head Marketing; Himanshu Pant, AGM Sales;  
Kavindra Mishra, MD & CEO  
Presented by:  
Mukesh Kumar, VP, Infinity Mall



**NOMINEES:**  
Calvin Klein | Hoffmen | Jack and Jones | Only |  
Pepe | Tommy Hilfiger



**IMAGES MOST ADMIRED  
FASHION BRAND OF THE YEAR:  
WOMEN'S INDIANWEAR**



*1,540 sales points and a pan-India presence. Last year, 540 sales points were added with 1,49,000 sq. ft. increase in W's EBO space. There was 80 percent brand sales growth and 71 percent EBO sales growth. The brand also successfully transformed itself from a summer-wear kurta brand to an all season lifestyle brand.*

Received by:  
Lalit Raghuvanshi, Sales Head; Anant Daga, CEO; Sreyashee Halder, Design Head

Presented by:  
Neelima Singh, Director, NIFT, Mumbai



**NOMINEES:**

Biba | Melange by Lifestyle | Neeru's | W

**IMAGES MOST ADMIRED  
FASHION BRAND OF THE YEAR:  
INNERWEAR**

**UNITED COLORS  
OF BENETTON.**

*United Colors of Benetton has 786 sales points across India. In 2015, for the innerwear category, retail space grew by 20 percent, increasing EBO space by 1 lakh 33 thousand square feet. There was 67 percent sales growth and 30 percent EBO sales growth.*



**NOMINEES:**

Calvin Klein | La Senza | United Colors of Benetton

Received by:

Team Benetton

Presented by:

Neelima Singh, Director, NIFT, Mumbai



IMAGES MOST ADMIRER  
FASHION BRAND OF THE YEAR:  
**NEW LAUNCH**  
(WITH SMALL RETAIL FORMAT)

◀ Calvin Klein  
underwear

*Calvin Klein Lingerie was launched in April 2015 and opened 9 stores in the top malls of the country. The brand achieved ₹100 SSPD, and also managed to draw in an astonishing 7.5 lakh fans from India on the Calvin Klein facebook page.*

Received by:  
**Mubin Sheikh**, Area Manager (West), Key Accounts; **Sanjeeb Kumar**, Regional Manager (West); **Vishal Anand**, Head of Operations, Business Development and Projects; **Punit Khatri**, Cluster Manager (West); **Ashutosh Sabharwal**, Sales Head

Presented by:  
**Prasad Menon**, Associate Partner, Better Future India;  
**Huzefa Merchant**, MD, INSYNC Retail



NOMINEES:  
Calvin Klein Lingerie | GAP | Pepe Jeans (Kidswear) | Raymond Linen

IMAGES MOST ADMIRER  
FASHION BRAND OF THE YEAR:  
**NEW LAUNCH**  
(WITH LARGE RETAIL FORMAT)



*GAP entered India in May 2015 with the first store opening at the Select City Walk, New Delhi. To flag the brand's opening in the country, the entire mall façade was 'blue washed' with the GAP colours. GAP India got a special recognition by GAP Inc. for this unique idea and this is now part of the brand's signature in new city launches. On Twitter, #helloIndia campaign was broken by different American brands to say hello to Gap, with #helloIndia trending across the country on Twitter.*



Received by:  
**Rajesh Raghuvanshi**, Regional Manager (West)

Presented by:  
**Prasad Menon**, Associate Partner, Better Future India;  
**Huzefa Merchant**, MD, INSYNC Retail



NOMINEES:  
Calvin Klein Lingerie | GAP | Pepe Jeans (Kidswear) | Raymond Linen



IMAGES MOST ADMIRED  
FASHION RETAILER OF THE YEAR:  
LARGE FORMAT STORE CHAIN



*MAX is celebrating 10 years in India and currently has 135 stores in 50 cities. Growing at 35 percent CAGR, it is the most profitable mono fashion brand in the country. In 2015, total retail space grew by 11 percent over the previous year and total annual sales turnover grew by 29 percent over the previous year.*

Received by:  
**Ramanathan Hariharan**, Director -Landmark Group (India); **Kabir Lumba**, Managing Director, Lifestyle International Pvt. Ltd.; **Raghu Rajagopalan**, SVP Finance & Accounts, Max; **Piyush Sharma**, GM OPS Head (West), Max; **Satish Puranam**, AVP Business Development and New Store Opening, Max; **Saurabh G**, AVP OPS Head (North), Max; **Kamakshi Kaul**, AVP Design (Women's wear & Kidswear), Max

Presented by:  
**Agnes Kubiak**, Co-Founder & Creative Director, Style Vision, Paris (International Expert)



NOMINEES:

Lifestyle | Max Fashion | Shoppers Stop

IMAGES MOST ADMIRED  
REGIONAL FASHION  
RETAILER OF THE YEAR



*Neeru's has marked a new standard in ethnic fashion trends in not only Hyderabad and South India, but across the country. Neeru's currently has 25 stores and grew by 125 percent in 2015 over the previous year. Total retail space grew by 110 percent and total annual sales turnover grew by 79 percent over the previous year!*



NOMINEES:

Akbarallys Men | Blue Club Collection | Chunmun | Jade Blue | Neeru's | No Exit | Options | Sohum Shoppe | Study by Janak

Received by:  
**Harish Kumar**, MD, Neeru's Ensembles Pvt. Ltd.

Presented by:  
**Agnes Kubiak**, Co-Founder & Creative Director, Style Vision, Paris (International Expert)



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# DESIGN AWARDS



Received by:  
**Sumeet Soni**, Brand Director -Raymond Ready to Wear  
Presented by:  
**Ramanathan Hariharan**, Director -Landmark Group (India)

## IMAGES MOST ADMIRER FASHION DESIGN CONCEPT OF THE YEAR



**All Season Wool Shirt by Raymond** is a first of its kind in the world! The wool shirt combines the properties of wool to give the feel of cotton. Developing an innovative product in wool for formal shirt was a challenge as the wool has to be lightweight, fine and all weather, but Raymond has delivered a first of its kind innovation that can be a game changer in the fashion business.



### NOMINEES:

All Season Wool Shirt by Raymond | Autumn Winter Collection By United Colors Of Benetton | Custom Studio By Pepe | Column Look by W | Flexi Jacket by Raymond | Spring Summer Collection By Max Fashion

## IMAGES MOST ADMIRER FASHION DESIGN CONCEPT OF THE YEAR



Pepe Jeans introduced a first-ever custom denim service at its Delhi store in Connaught Place last year. The Custom Studio is a bespoke service from Pepe Jeans that allows customers to step into the design seat and customise their denim in a whole host of different ways: with buttons, laser prints or applications such as studs. The possibilities are endless and the result is pure originality. At **Pepe Jeans Custom Studio**, passion for denim, art, fashion and desire to reflect innovation, originality and creativity in garments was born.



### NOMINEES:

All Season Wool Shirt by Raymond | Autumn Winter Collection By United Colors Of Benetton | Custom Studio By Pepe | Column Look by W | Flexi Jacket by Raymond | Spring Summer Collection By Max Fashion



Received by:  
**Neha Shah**, Head Marketing; **Himanshu Pant**, AGM Sales; **Manish Kapoor**, VP Sales

Presented by:  
**Ramanathan Hariharan**, Director -Landmark Group (India)



# DESIGN AWARDS

## IMAGES MOST ADMIRIED STORE DESIGN CONCEPT OF THE YEAR

Presented by:

Kapil Bhatia, Group Head Fashion, AskMeBazaar.com



Received by:

Sachin Kumar, Designer, Raymond Ready to Wear; Sudhir Soundalgekar, Director, Projects; Sanjeev Rao, Director, Business Development; Nagendra Singh, Head, BD & Projects; Sumeet Soni, Brand Director, Raymond Ready to Wear; Kishore Asrani, Deputy GM, Business Development



At **Raymond Ready to Wear, 'The Style Bar'** is an insightful journey defined by a new level of service, heightened by expert styling and attentive technology. The new store promises to provide a unique & ultra-luxurious modern shopping experience to customers. The store fuses the best in class technology with unmatched hospitality to redefine the consumer's retail experience.



**Forever Faster by Puma** goes to the very basics of retail by placing heavy emphasis on products. The concept has been designed to showcase and follow principles and make a statement on the fusion of performance and lifestyle, all united for the passion of sport and to be forever faster. The look & feel is modern, inspirational and sport-focused. It is simple to give right focus to the products, which should resonate, stir emotions, stand out and demand attention. The customer experiences the puma brand DNA throughout their store journey.



Received by:

Binwant Singh, Manager, Marketing; Takshil Shah, Regional Retail Manager (West); Atul Bajaj, Executive Director (Product & Merchandising)

### UNITED COLORS OF BENETTON.



Received by:

Team Benetton

**Canvas by UCB** is derived from the easel of an artist where colours of garment is played within a dynamic way. Every screw carries the nostalgia of a pre-industrial era. Every material is finished to retain the most natural feel possible. Textures have been explored: heritage and monumental brick wall, concrete, exposed ceiling, electrical system, wall papers. Energy efficient LEDs consume up to 90 percent lower electricity are specially designed to provide depth of colour & texture to the garment fabrics on display. A must-see store concept!

# SPECIAL JURY AWARDS



Received by:  
**Kunal Mehta**, VP, Marketing and Business Development;  
**Manish Mandhana**, Joint Managing Director, Mandhana Industries Ltd.

Presented by:  
**Puneet Verma**, Head Marketing, Inorbit Mall

## IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: INDIAN RISING STAR



One of the fastest growing Indian brands, Being Human retails through 500 point of sales (POS) globally spread across about 16 countries. Within 3 years of its launch, it opened 44 exclusive stores across India. It retailed across 190 shop-in-shop islands with the top LFS partners such as Shoppers Stop, Lifestyle, Westside, Central, Splash, Jade Blue amongst others. Additionally, the brand has been strong online and is available with Amazon, Flipkart, Koovs, Jabong, Myntra and Snapdeal. Being Human grew by 56 percent in 2015 over the previous year and total retail space grew by 34 percent. Total annual sales turnover grew by 56 percent over the previous year. In international markets, apart from being available in Europe and the Middle East, it also launched in South Africa with e-commerce partner Zando in 2015.

## IMAGES MOST ADMIRED FASHION RETAILER OF THE YEAR: MARKETING & PROMOTIONS



Max Fashion's Brand positioning is 'Make Everyday Fashionable', which is a reflection of the brand's mission to "democratise fashion" in India. Max associated with Saavn to communicate the season theme 'Today's for Small Joys'. The campaign saw a CTR of 7 percent and had over 5,500 unique listeners who used the playlist to listen to their favourite songs. Among many other strategic moves, the brand also partnered with Mirchi South Music Awards as a fashion partner & prepared an AV with celebrity attendees talking about 'Small Joy They Miss Today'. This AV reached over 7 Lakh people in Cinema and total 1,300 tweets were received over a 2-weeks period and impressions of 13.2 Lakh and over 1.7 lakh accounts reached.



Received by:  
**Royston Pinto**, GM Marketing, Max; **Raghu Rajagopalan**, SVP Finance & Accounts, Max

Presented by:  
**Anurag Saxena**, Country Head, ICLP



Received by:  
**Raghu Rajagopalan**, SVP Finance & Accounts, Max; **Nimish Shah**, COO (West), Lifestyle; **Kabir Lumba**, Managing Director, Lifestyle International Pvt. Ltd.; **Ramanathan Hariharan**, Director-Landmark Group (India)

Presented by:  
**Bhavik Jhaveri**, Founder & CEO, Pretr

## IMAGES MOST ADMIRED FASHION RETAILER OF THE YEAR: HR INITIATIVES



Lifestyle's focussed training programme across the talent pool helped filling up nearly 400 internal job opportunity through talent within the organization last year. The chain's internal job posting platform called Launchpad roved opportunity to more than 365 employees at all levels to take up new roles across functions in Middle East and India. Under the Swabhimaan program, over 250 people with disabilities were hired for various positions in the organization, trained and are now excelling at their job profiles.

# SPECIAL JURY AWARDS



Received by:

**Sanjeev Rao**, Director, Business Development; **Sumeet Soni**, Brand Director, Raymond Ready to Wear; **Pramod Sharma**, Manager, Design (Raymond Apparel); **Nagendra Singh**, Head, BD & Projects; **Varun Kumar**, Assistant Manager, Garment designing (Textiles); **Sweta Kumari**, Assistant Manager, Product Innovation; **Vijay Desure**, Senior Manager, Product (Exotic Collection); **Kishor Bhatia**, Director, Product (Suiting)

Presented by:

**Anupreet Bhui**, Senior Editor, Street Style and Trend Specialist (International Expert from Hong Kong)

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: PRODUCT DEVELOPMENT



Raymond launched 3 exclusive animal fiber products – Qiviut, Beaver & Ibex – in 2015. Using Lotus stems, Raymond crafted a luxurious line with unique properties like water repellent, breathability, soft touch and lightweight. Developed from the Rose petals Raymond innovated a fabulous fabric with properties of moisture absorption, ventilation, soft handle, skin care and appearance retention. Other innovations included Techno Smart, Celliant, Vitamin E, Thermochromic and Café, Thermochromic, Colour Changing fabrics. New product developments generated a business of ₹100 crores last year.

## IMAGES MOST ADMIRED FASHION RETAILER: OMNICHANNEL INITIATIVE

Presented by: **Bhavesh Pitroda**, Images Group



Received by:

**Sachin Oswal**, Customer Care Associate & Head- Omni-Channel Retail

**MULTI BRAND:**

**SHOPPERS STOP**

In Q1 2015, Shoppers Stop laid down Anywhere Anytime strategy roadmap to be a truly omnichannel retailer by 2017 with 60 Cr dedicated investment. Planned in 3 phases - digital capability buildout (2015), multi-channel (2016), true omnichannel (2017), it signed up for SAP Hybris Commerce & Order Management Platform in Q2 and Warehouse Management System in Q4 2015. A redesigned website - completely responsive across various screen sizes including mobile, tablets etc. helped in doubling conversions. The goal is to aggregate all marketplaces through one platform so that its inventory flows into all marketplaces and ordered aggregate into one OMS. This will enable omnichannel customer journeys & the Benefits of shopping with Shoppers Stop such as ability to returns / exchanges at any of our physical stores for all products brought online at any marketplaces.



Received by:

**Abhishek Lal**, Senior E-Commerce Director

**OWN BRAND:**

**adidas**  
GROUP

Adidas Group identified three key strategic pillars to converge the online & offline world : 1. Create strong instore experiences; 2. Move from data to actionable data; 3. Provide seamless cross channel experiences. The group has set a target of acquiring 1 million consumers in 2016. The objective is to know the consumers in a meaningful way and eventually create a single customer view. This single customer view would then help in driving relevant, credible and authentic marketing/ conversations with the consumers. Also for the first time a toll free Omnichannel Customer Care number was launched in 2015. It is backed by a reputed call centre with customer centric & trained agents. The solution is managed by a franchisee. The entire technology developed in-house and powered by Microsoft AX ERP and Microsoft Dynamics CRM.

IMAGES MOST ADMIRED FASHION RETAIL PROFESSIONAL OF THE YEAR



**SHAILESH CHATURVEDI**

Received by:  
Shailesh Chaturvedi, Chief Executive Officer, Tommy Hilfiger India

Presented by:  
Amitabh Taneja, Chief Convenor, India Fashion Forum; Kabir Lumba, Chairman, IFF and MD, Lifestyle International, Amit Maheshwari, CEO, Exclusively.com

*A renowned industry thought leader in developing premium brands in India, Shailesh has been heading Tommy Hilfiger business in India for the last 10 years. The success of Tommy Hilfiger's business in India under his stewardship has resulted in many recognitions including several awards as 'The Most Admired Premium Lifestyle Brand' in India at the Images Fashion Awards (IFAs). This year again Tommy Hilfiger emerged the 'Most Admired Fashion Brand of the Year: Men's Westernwear'.*

*Shailesh has launched and developed some of the biggest brands in India including Tommy Hilfiger, Esprit and brands of Madura Garments including Louis Philippe, Van Heusen and Allen Solly. Success with Tommy Hilfiger assignment has led to his selection into Business Today magazine's prestigious annual list of top 10 young CEOs in India in Feb2009. The CNBC channel also featured him in 'The Young Turks in India' series in April 2008.*

*Shailesh's earlier stint was in leading the Asia Pacific Wholesale-Business of Benetton Plc, Italy. Based out of Hong Kong, this responsibility of leading Benetton Group business of 12 APAC countries honed his international fashion business skills. Before this stint in Hong Kong, Shailesh had worked for 13 years with*

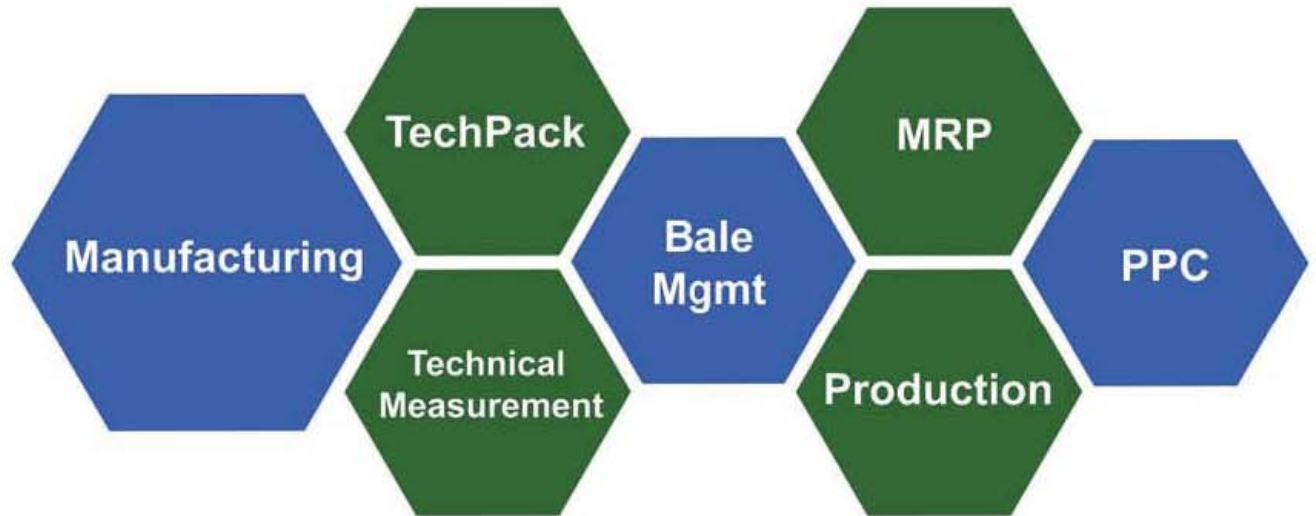
*the Madura Group, the Indian arm of the British Coats Viyella group. In a pioneering role within which he had also set up the international brand's business of Madura Garments and was responsible for strategic tie ups with international brands for their entry into Indian market, including the tie up with Esprit brand from Germany for its launch in India in yr 2005. He had also handled the business responsibility of several premium brands of Madura Garments as its General Manager - Marketing. These included brands like Louise Philippe, Van Heusen and Allen Solly.*

*He was the Co-Chairman of the IRF in 2013 and before that in November 2008, Shailesh was selected as an executive committee member of 'India Fashion Alliance'.*

*Shailesh has a Bachelor's degree in Engineering and had also completed his Master's in Business Administration from Bombay University in the year 1992. Shailesh finds timeless inspiration from an eclectic mix that includes the Bhagwad Gita and the works of management thought leaders like Peter Drucker, Deming, Jack Welch, and Steve Jobs. His fashion inspiration comes from, but of course, Tommy Hilfiger and his perspective on bigger movements from Charles Darwin's Theory of Evolution.*

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Presented by: Amit Maheshwari, CEO, Exclusively.com



MEN'S WEAR:  
DESIGNER OF THE YEAR

**KUNAL RAWAL**

*Kunal is like a breath of fresh air in the men's fashion scene. His designs have draped the tallest in society and Bollywood; and he himself has grown immensely in stature.*

WOMEN'S WEAR:  
DESIGNER OF THE YEAR

**PAYAL SINGHAL**

*Payal is the most popular and the highest contributor in exclusively.com's women's wear category, her designs are fresh and modern. She has been associated with Exclusively.com right from its inception.*



TAKING INDIAN FASHION TO A  
GLOBAL PLATFORM

**FALGUNI & SHANE PEACOCK**

*India's famous fashion designer duo Falguni Peacock and husband Shane Peacock have achieved great success in the industry, their popularity is not just limited to the indian fashion circle, but has gone global. They have Hollywood celebrities strutting their unique dresses. Jennifer Lopez, Katy Perry, Rihanna and Madonna are just some of the big names the pair have worked with.*



MOST PROMISING DESIGNER

**NIKHIL THAMPI**

*Nikhil is the most promising debutant on Exclusively.com. In a short span of time, he has gained much popularity on the site both in terms of sales and searches. Exclusively.com's customers cannot stop asking for more from his collections.*



Presented by: **Amitabh Taneja**, Chief Convenor, India Fashion Forum;  
**Sunjay Guleria**, Co-Founder, Exclusively.com; **Abhishek Passi**, COO, Exclusively.com;



MOST POPULAR DESIGNER

**PRIYANKA & ANKUR MODI**

*The designer is Exclusively.com's; biggest contributor in terms of both GMV and units sold.*

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 RECOGNISED INTERNATIONALLY

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BEST STYLIST

**AMI PATEL**

*The best known stylist amongst the Bollywood fraternity, she has closely worked with Exclusively.com, styling some of the most renowned celebrities.*

BEST FASHION BLOGGER

**LOVE & OTHER BUGS**

*With the largest number of followings and a very fashion relevant content, Love & Other Bugs has gained popularity in all genre of people.*



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# MILANO UNICA XXII



## IDEABIELLA MILANOUNICA XXII EDITION

**MILANO UNICA XXII: "UNITED TO BE UNIQUE"**

**TREND AREA: MOODS AT THE SPRING/SUMMER 2017**

**VINTAGE FASHION | FASHION SCHOOLS | BITES**

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MILANO UNICA



MILANO UNICA XXII

**MILANO UNICA XXII: "UNITED TO BE UNIQUE"**

The XXII edition of the Italian Textile and Accessory Trade Show - Milano Unica presented the new initiatives designed to meet the emerging and changing needs of the global market. The show was dedicated to fabrics and accessories collections for the Spring/Summer 2017 season.

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**THE SHOW, KOREAN OBSERVATORY, JAPANESE OBSERVATORY**

Milano Unica XXII The Show, Korean Observatory, Japanese Observatory The trade show had special areas dedicated to separate categories, accessories, international pavilions, young talents and also other initiatives, such as, the traditional area for vintage research and another area dedicated to linen.

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**MILANO UNICA XXII THE WOOL LAB SPRING/SUMMER 2017 BY WOOLMARK**

The Woolmark Company presented its latest edition of the seasonal guide at Milano Unica, 'The Wool Lab Spring/Summer 2017', an innovative seasonal guide.

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**MILANO UNICA XXII TREND AREA: MOODS AT THE SPRING SUMMER 2017**

The Trend Area at the XXII edition of the Milano Unica, featured four main themes - Abyss, Nature and Artifice, Africa Punk and Psycho Bit for the Spring/Summer 2017, where visitors could find inspiration and creative sparks to develop more innovative, future-oriented products.

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**NEXT SECTION SPORTSWEAR INTERNATIONAL**

Pg no. 174-205





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# MILANO UNICA

## XXII EDITION: “UNITED TO BE UNIQUE”

The XXII edition of the Italian Textile and Accessory Trade Show – Milano Unica was held at Fiera Milano City from February 9 to 11, 2016. The fair presented the new initiatives designed in partnership with the Executive Committee to meet the emerging and changing needs of the global market. The show was dedicated to fabrics and accessories collections for the Spring-Summer 2017 season.



The Milano Unica XXII show hosted 371 exhibitors which was an up from the past February 2015 edition. Of these, 72 exhibitors were from outside Italy. In addition, 40 companies featured in the Japan Observatory, area dedicated to Japanese manufacturing excellence, and 13 companies participated in the Korea Observatory. All together 424 exhibitors participated in the trade show. Said General Director Massimo Mosiello, “We are proud of this growth, because it is evidence of the unflinching trust that our trade show, that showcases Made-in-Italy textiles and accessories in the world, has developed, despite the blizzard of the century that hit New York. We are, above all, proud because our investments in trends and the dedicated area in the exhibition ground resulted in making our trade show a must in the world’s fashion community panorama,” He, in particular, pointed towards the space given to showcase young talent, vintage research and linen.

### THE INAUGURAL

The inaugural ceremony of Milano Unica XXII edition was attended by Ercole Botto Poala, the newly appointed President of Milano Unica; Giuliano Pisapia, Mayor of the City of Milan; Claudio Marenzi, President of Sistema Moda Italia; and Roberto Luongo, General Director of ICE Agency, the Italian Trade Promotion Agency. The inauguration ceremony confirmed the strategies outlined in recent years with the former Deputy Minister Carlo Calenda, who played a key role in establishing a fruitful and concrete dialogue between the different trade shows of the entire supply chain. Minister Federica Guidi is carrying forward the same strategies. Former President Silvio Albini was also fondly applauded for his large contribution. Said President Botto Poala, “Milano Unica is changing, because the fashion world has radically changed in the last few years. Milano Unica must become increasingly unique, fostering a concrete and challenging



*"United to be Unique - is our motto. Excellence drew us together, success brought us here, innovation makes us look to new goals and change will accompany us in the future."*

**- Ercole Botto Poala,**  
President, Milano Unica

*"Milano Unica will continue to be a Tradeshow of excellence and creativity, presenting the finest of Italian invention to the world."*

**- Ercole Botto Poala**  
President Milano, Unica

*"The outcome of the show was very promising and had a positive outlook for important innovations."*

**- Massimo Mosiello,**  
General Manager, Milano Unica

synergy between the entrepreneurs. I like to refer to Expo as a model to imitate because during an Expo, different institutions with different political orientations demonstrate to all business people that only by teaming up, can we achieve significant results which contributes in building our image and business abroad." He further shared, "United to be Unique - is our motto. Excellence drew us together, success brought us here, innovation makes us look to new goals and change will accompany us in the future."

The evening of the inauguration hosted a spectacular performance by Gloria Gaynor, the disco music icon, accompanied by an 11-piece orchestra which interpreted some of her greatest hits. The evening began with a dialogue between journalist Simone Marchetti and Ercole Botto Poala, President

of Milano Unica. The topics included new trends of change and the project for the future Fair at the Rho-Però headquarters.

#### AN EXTRAORDINARY EDITION

According to Ercole Botto Poala, the XXII edition of Milano Unica was extraordinary for a number of reasons. There was a significant increase in the number of firms visiting the stands, which corresponded to general satisfaction among the exhibitors for the quality of business contacts made. Furthermore, he was delighted that it occurred during his period of presidency. He affirmed, "I will try and characterise my presidency by cultivating the diversity in an elastic frame of unity, making Milano Unica become a showcase for top Italian know-how. Even the idea of luxury should be updated to be synonymous with excellence and not only exclusivity. Milano Unica will continue to be a trade show of excellence and creativity, presenting the finest of Italian invention to



the world. Fashion begins with textiles and accessories, and Milano Unica will make it tangible, using modern-day instruments, from mood boards to social technology, communicating by means of emotions and sensations.”

Also, the formula adopted for the opening of the event was very innovative as compared to the past. There was a strong focus on the future and on the development of new and shared strategies, with a view to launching new concepts of hospitality and trade show.

This edition of Milano Unica was supported by the Woolmark Company, Banca Sella, Italian Ministry for the Economic Development; ICE Agency, the Italian Trade Promotion Agency and Sistema Moda Italia.

#### THE TURNING POINT

The edition also marked a very significant turning point as in September'16, the show is to relocate to Fieramilano, located in Rho, Italy, a 10-mile drive from Milan. Explained Ercole Botto Poala, “Starting from the next edition, Milano Unica will move to the new Rho exhibition area, because we need more space to develop a truly unique trade show in its concept.” “We are physically not able to grow here,” said he.

He added, “In September, together with the Japan and Korea Observatories, we will also have Origin Passion and Beliefs, an exhibit dedicated to suppliers of fine quality semi-finished products ‘Made in Italy’, promoted by the Fair of Vicenza. In addition, we will be in synergy with Lineapelle, the international trade show

specializing in leathers, accessories, components, fabrics, synthetics and models. This goes to prove that creating a network is not only through words but through facts.”

Massimo Mosiello, General Manager of Milano Unica pointed out that the outcome of the show was very promising and had a positive outlook for important innovations. The consolidation of Japan and Korea Observatories demonstrated that the versatility of excellent offers represented an added plus point not only to the visitors but also for the exhibitors. He said, “There will be traditional subdivisions in September, but we will plan more functional layouts to last, with the help of our clients, in order to make the best use of their fair time.”



IN THE FOLLOWING PAGES WE CARRY A REPORT ON KEY SEGMENTS AND HIGHLIGHTS OF MILANO UNICA 22<sup>ND</sup> EDITION.

Images Business of Fashion thanks Milano Unica and Italian Trade Agency for their sponsorship of travel and hospitality towards this coverage. Also the entire management, Susi Castellino, Mariabarbara Masi, and the team of Milano Unica; the management, Antonio Lucarelli, Beni Consumo, Richa Dua and the team of Italian Trade Agency for all help and courtesies. Pictures courtesy: Andrea Erdna Barletta (“Erdna”), The Woolmark Company and Rajan Varma. Report by Rajan Varma, Images Business of Fashion

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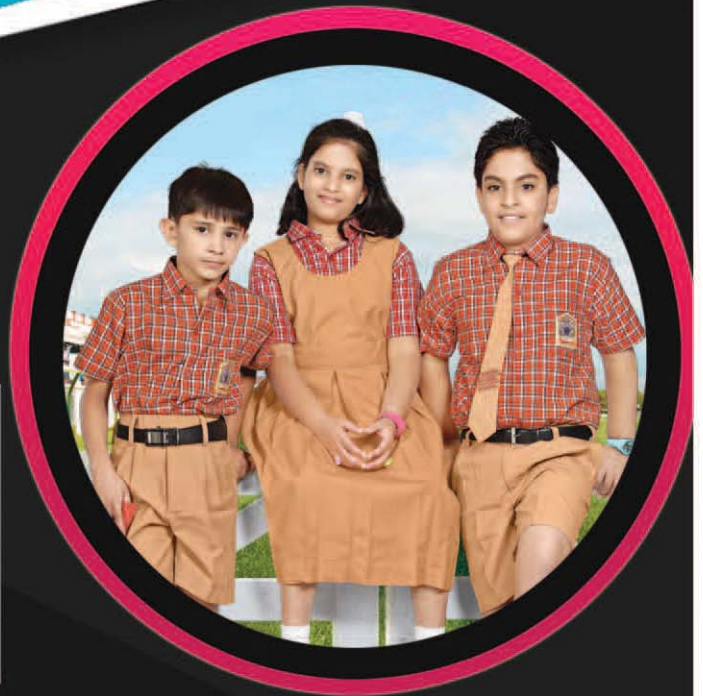


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## THE SHOW

The trade show had a special area dedicated to young talents and also other initiatives, such as, the traditional area for vintage research and another area dedicated to linen. The accessories area was shifted to Hall 5, a new and more functional hall, along with the Japan and Korea Observatories.



## THE KOREAN OBSERVATORY

The Korean Observatory at Milano Unica XXII, presented thirteen exhibitors in association with the Korea Textile Trade Association (KTTA) and Korea Trade-Investment Promotion Agency (KOTRA). The exhibitors included - AB Industries, BECO International Ltd., Duksung Inco Co. Ltd., FT Tex Co. Ltd., GB Textile Co. Ltd., L-Button Study Co. Ltd., Ludia Co. Ltd., Paka Intertex Co. Ltd., Monotex-Shin Heung Corporation, SNT Co. Ltd., Taipyung Textile Co., Yoonia Tex Co. Ltd., Young Poong Filltex Co. Ltd.

With 125 Korean Business Centres in 85 countries worldwide, KOTRA serves as a vessel through which foreign companies can conveniently cooperate with Korean companies. As Korea strives to lead the \$1 trillion trade era, KOTRA is supporting the globalization of Korean SMEs, so they can become reliable partners for businesses overseas. Korea Textile Trade Association (KTTA), formed in 1997, consists of more than nine hundred textile exporters and importers, representing Korea. The combined trade volume accounted in all for more than 27,584 million dollars in 2015.

×







## THE JAPANESE OBSERVATORY



**T**he Japan Fashion Week Organization (JFW) operated the Japanese Observatory in cooperation with the Japan External Trade Organization (JETRO) and in collaboration with Milano Unica. 36 specially selected Japanese companies and groups, PR and trend booths showcased trends and presented highlighted fabrics from the exhibitors, along with a special exhibition area introducing 'Japan Craftsmanship-Takumi'. The section featured companies like - Furuhashi Weaving Co. Ltd., Hayashiyo Co. Ltd. and A-Girl's Co. Ltd.

The graceful elegance of Japanese beauty, enriched by seasonal natural wealth alongside cutting-edge technology, has created unique and unrivalled sensitivity through intermingled global culture. In the textile field, fabrics retaining an ever-delicate and expressive nature, the fruit of sensitivity imbued in craftsmanship and elaborate skills uniquely established in Japan, have been globally acclaimed.





## TREND AREA: MOODS AT THE SPRING/ SUMMER 2017



The Trend Area at the XXII edition of the Milano Unica, featured four main themes - Abyss, Nature and Artifice, Africa Punk and Psycho Bit for the Spring-Summer 2017, where visitors could find inspiration and creative sparks to develop more innovative, future-oriented products.

The four main thematic areas were identified after an elaborate research comprising of common obsessions, intuition and provocation, visions and affinities that link the northern and southern parts of the world, making up the true DNA of the trends. The four themes could coexist in a unique complex interpretation or even evolve separately in order to satisfy both creative and business requirements for professionals in the sector.

Materials in the Trend Area were selected for their aspects and composition and could be divided ideally into two large groups, the first `Abyss and Psycho Bit` protagonists of the brighter, iridescent and sparkling part; the second `Nature and Artifice and Africa

punk`, where colour contrasts prevailed and more rigid elements intermingled with soft and natural materials.

Stated Art Director Stefano Fadda, "We have decided to overlay materials that have never been teamed together before. In all four themes we want to revolutionise the concept of colour and fabric. Combinations are usually made according to shades of colour or qualities of material, but this time we have coupled together materials that reinforce each other, giving new and modern aspects to the layout."

The objective was to create a meeting point between the demands of exhibitors, by focusing on each product, and the needs of users who could invent a story for each combination. In the selection, it was noticed that `Nature` and `Artifice` was a more popular theme regarding colour and material, in both fabrics and accessories

# ABYSS: DEPTH AS AN INSPIRATION

The theme 'Abyss' was inspired by the ocean depths inhabited by animal and plant life of evocative consistency and magical colours. A physical and a mental abyssal atmosphere, in search of inner self and creative loneliness. Everything here was extraordinary, imaginative and poetic. The colour blue was the protagonist in various shades and tones. Baltic, aster and nautical blue followed one another in waves of colours, highlighted by coral flashes, violet iridescence and shades of pink. The colour range developed around spot colours, upon which shiny layers were overlapped to exalt abyssal nuances.

silicone with neon effects, plastic with reflecting droplets and irregular jacquard patterns enhanced with lurex. Overlapping became the stylistic novelty of the season. Layering and gathering alternated with artisan workmanship, the use of uneven, pale yarns and tulle. The theme also featured inventive shirting with play on stripes and shaded, luminescent designs.

Appliqués featured irregular marine shapes, recycled materials ranging from terry to mesh to raw knits. The embroidery was enhanced with crystals, Swarovski and transparent macro sequins. Accessories, appliqués and buttons in over versions, were covered by filaments, cuts and iridescence. Labels and packaging was in overlapping plastic and silicone.

---

*Everything floats;  
nothing is motionless in the deep sea  
populated by animals and plants of evocative  
consistency and magical colours.  
We are in a physical and mental abyssal place,  
of search for inner self and of creative loneliness.  
Everything here is extraordinary,  
imaginative and poetic.*

---

The materials included shiny, uneven or brushed pleatings, shimmering raffia fringes, glossy elements and plastic and overlapping mesh. Special workmanship focused on





# NATURE AND ARTIFICE: A MOSAIC OF REAL AND ARTIFICIAL GEOMETRIC LANDSCAPES

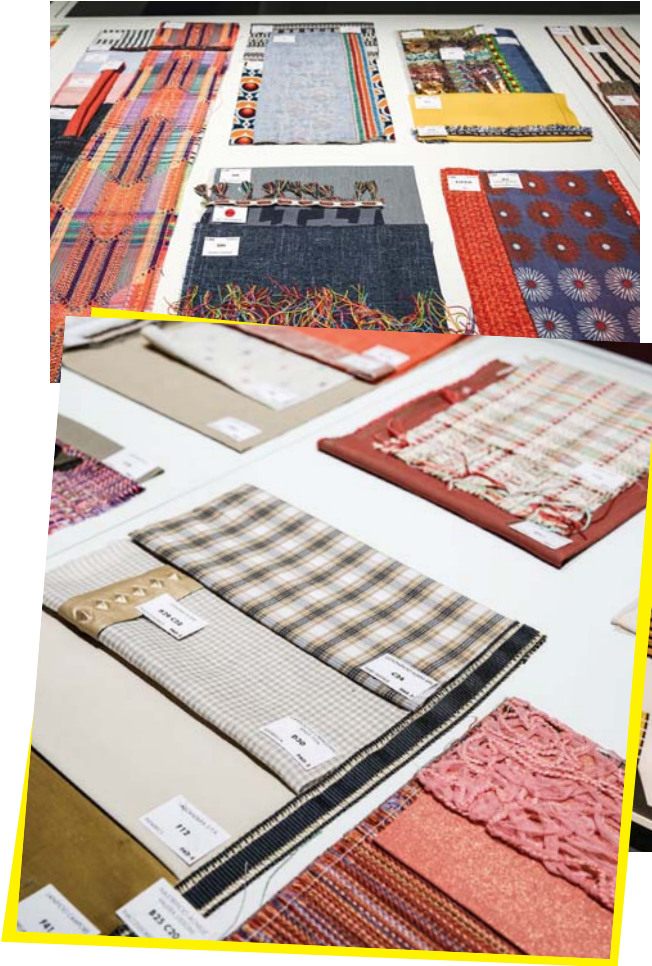
*A bird's eye-view, an aerial mapping of different areas in the world, showing geometric patterns of natural landscapes with well-defined outlines, cut off by human interventions or rather by urban interruptions and concrete breaks. What is artificial is as real as the natural. Between truth and forgery, between the immensity of the sea and megacities, there is a complicity ruled by human passion.*

Nature and Artifice' featured a mosaic of real and artificial geometric landscapes. The theme presented green and grey colours in contrast with flashes of orange tones that pierce the landscapes. Turbulence and chateau gray described urban elements as well as para sailing. Granite green and palm described the natural sphere.

The materials were natural and delicate. Shaded prints recalled earthy elements. Classic tweeds were presented in urban versions. Natural textures were reinterpreted through special weaves. The theme featured use of laminated and embossed laces, porphyry and stone materials, 3D effects on buttons, shiny and iridescent accessories, and tapes with embossing and encrustations. Silicone was combined with cloth and raffia to create novel closures and buckles. Labeling was characterised by elements borrowed from vegetation with hi-tech inserts.



# AFRICA PUNK: PRIMITIVE AND NATURAL URBAN FABRIC




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*It is the black magical and sensual Africa,  
with its amazing sunsets and its big contradictions.  
A powerful universe in terms of charm and of impact on reality.  
There is no room for romantic and heavenly visions;  
intensity originates from the force of nature,  
the struggle for survival and from black,  
the colour symbol of punk catharsis.*

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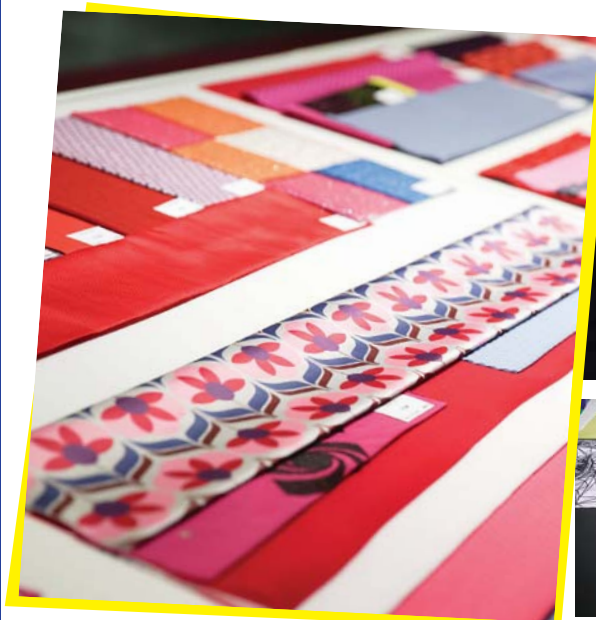
**T**he theme 'Africa Punk' was inspired by the magical and sensual black Africa, with its magnificent sunsets and its big contradictions. Colours included yellow, red and natural tones, accompanied by black and white to define details and borders. Fringes were the distinctive feature, a result of braiding and workmanship obtained with chromed rubber cables and multi-colour, transparent or lurex tapes. Leather sequins were layered over micro and macro African prints, typical of African costumes. Feathers and natural fabrics like cotton and silk prevail, were enriched by prints and plasticiser fringes. The graphics were spread like tar, expressing a concept of urban and punk exoticism. Embossed geometrics with pointy finishing and 3D sections emphasized the war-like vocation of this theme. Tribal tattoos were a source of inspiration for the decorative metallic elements. The theme featured use of accessories like macro buttons characterised by the layering of scales and metallic inserts; ribbons with open weaves, almost like chromatic networks alternating bright colours with black and fringes printed and heat-sealed on raffia. Focus was also on use of studs in plastic and silicone in dull colours, jacquard zips which added decorative touches to any garment, macro decorations composed of metallic elements and pyramid-shaped studs. New materials like stone, antique wood with leather and lacquered inserts were used for labeling.



## PSYCHO BIT: A HALLUCINATORY TRIP INTO ARITHMETIC PROGRESSION

*The feeling of mental, physical and expressive freedom is the common thread of this trend. In this context, you must dare to go beyond any aesthetic convention and even overcome the material potential of fabrics in order to create new textures and arouse that kind of emotions that starting from a look, go straight to the heart and the mind.*

**P**sycho Bit' was a theme made up of two words, "psycho" and "bit", which referred to the two connected worlds - the psychedelic one full of colourful pinwheels and a technological one made of a mosaic of geometric patterns. The colours were violent, almost like optical flashes of yellow, pink, purple and green. The black and white of 'Bit' created shaded and 3D geometric prints. The theme focused on hologram effect prints, with backgrounds that seemed to move, adding a kinetic effect to the fabrics. Faux fur was an important element, in blends of cotton, raffia and rubbery threads. Vinyl was a must for both the psychedelic and technological world. Lycra was printed in floral designs, with rubbery effects, while shirting fabrics featured stripes, polka dots and patterns, featuring vinyl or lurex motifs. Fabric shading was obtained with water-soluble inks.



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*Monday, 2nd May 2016 at 10.00 am Sharp*

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## VINTAGE FASHION

The Vintage area at Milano Unica was a research area, showcasing the vintage collection, to enhance the value and quality of this multi-faceted world. The participants included - A.N.G.E.L.O., Cappi Vintage, Delirium Vintage Franco Jacassi, Punti Di Vista Di Stramare Lucio, Shabby Chic Vintage and Venturino Vintage.



## FASHION SCHOOLS MEET FABRICS

Various leading fashion schools including - Institute Modartech, Accademia Galli, Accademia di Brera, Accademia della Moda, Accademia Euromediterranea, AFOL Moda, IED Moda, Institute Burgo, Institute Secoli and NABA participated in the initiative 'Open Store - Fashion Schools meet Fabrics' at Milano Unica. The project was promoted by fashion and the Lombardy Region, in partnership with Platform System Training Fashion, an association representing the schools of higher education in fashion, and Milano Unica exhibitors. The project activated a network of textile enterprises and accessories interested to open their stores, to lend support and provide materials for the realization of these projects to the students in their final year of post-graduate courses.

## BITES OF MILANO UNICA

A TASTE OF THE BEST FABRICS  
IN THE BEST RESTAURANTS

A new initiative called - 'Bites of Milano Unica' was a very interesting initiative aimed at reaching end clients and merging Italy's two points of excellence - food and the textiles and accessories. For the entire month of February, the tables of four top Milanese restaurants - Daniel, Innocent Escapes, T'a Milano - Store & Bistro, The Small - were to be dressed with the tissues of the best exhibitors of the textile fair. Brocades, shirting fabrics, macrame' laces, accessories, trimmings, fastenings, decorative buttons, buckles - all that was seen, touched and discovered at the elegant stands of the fair were to be used for setting spectacular dining tables. The table settings were designed by experts of the table and the art of hospitality to create an exciting effect through the fabrics, but were in line with the style of each restaurant. Each table was to have a small 'fabric menu' with the characteristics, qualities, peculiarities and a brief description of the project. This would allow the guests to touch the fabrics, get to know their qualities and finishes in an entertaining and an unusual way. Also, the hash tag #bitesofmillanounica was to let guests share live pictures of these special tables.





## THE WOOL LAB SPRING/ SUMMER 2017 BY WOOLMARK

The Woolmark Company presented its latest edition of the seasonal guide at Milano Unica, 'The Wool Lab Spring/Summer 2017', an innovative seasonal guide to the best wool fabrics and yarns in the world, presenting commercially available fabrics.

The Wool Lab is created by The Woolmark Company in collaboration with the most innovative and quality-oriented spinners and weavers from across the world. Each season, the latest edition of The Wool Lab offers a concrete sourcing guide for the best fabrics and yarns in the world.

For Spring/ Summer 2017, The Wool Lab showcase eight inspirational themes. Out of which, six are dedicated to a style that is suitable for both women's wear and men's wear and the other two focus on wool in sports and active wear.

### THEMES

**GENERATIONS:** is dedicated to fundamental family figures. Sons and daughters look up to their parents and desire to look like them. Different generations express a shared identity. The luxury quality of wool textiles meets the design of traditional suits and broken suits, dresses and knitwear.

**BARBER'S:** is where the old fashioned job is reinterpreted by young generations, influencing the male identity. Charming places comes back to life, where men talk about public concerns and contemporary issues. The most classical fabric patterns are studied for lighter weights, for a more fresh and contemporary look for an authentic lifestyle.

**ASIAN FLAIR:** presents an understated sensuality inspired by oriental traditions. In everyday life, women enhance their femininity wearing voluminous but lightweight skirts and transparent embellished skirts and dresses. The

colour palette evokes Asian customs and landscapes.

**INFORMAL:** The informal way of dressing looks as comfortable as refined, thanks to rigorous but creative new cultural interpretations of a contemporary lifestyle. The mix and match of jackets and utility pieces brings a sense of formality to a casual style.

**NEW MAKERS:** is dedicated to innovative technologies that are able to combine traditional arts and experimental techniques. A new design movement imagines changing surfaces applied to strict shapes. The mission is merging the three-dimensional with the two-dimensional world, in order to create a forward-looking aesthetic.

**MATERIAL:** focused on artists as new artisans that take inspiration from the earth, using ancient techniques for unexpected and contemporary fabrics. It presents a blend of cultures, colours and atmosphere. Materials are raw, expressive, made of vibrant matter, and the fabrics are dense but lightweight.

**SPORT ACTIVE:** consists of most performing wool fabrics and yarns, mixed with technical fibres to ensure the best results during physical activity.

**SPORT STYLISH:** expresses the role of Merino wool as a fundamental element of the classic wardrobe of the most refined and exclusive sports such as golf, horse-riding, sailing and polo. Besides being 100 percent natural, Merino Wool is highly breathable, naturally elastic, thermo-regulating, antistatic, odour resistant and UV resistant.

The Wool Lab Preview Magazine AW 17/18 was presented at Milano Unica 2016. It is a printed version of The Wool Lab Preview.



# IMAGES BUSINESS OF FASHION

05 The MAY Issue

# THE KNITWEAR SPECIAL

The city of Kolkatta gave birth to the Indian Knitwear Industry over a century ago. And while, even today the city leads mostly in knitted innerwear, the industry has expanded to all corners of the country. The leading centers today are Ludhiana, Tirupur, Delhi, Bengaluru, Mumbai and Vapi. Besides these city hubs, the industry is expanding fast across upcoming units in Gujarat and Rajasthan. On the domestic retailing and consumption front, their qualities of the comfort, stretch ability, and easy care, have seen leading knitted product categories rapidly penetrate upper wear and now growing in strength in bottom-wear as well. As on date knitwear also dominates Indian exports as well.

On the non-cotton side woolen knits are most successful with several varieties being produced. This has been further boosted by developmental work by International promoters like Woolmark.

**The forthcoming May issue of Images BoF takes a look at the potential of knitwear in India and pinpoints the opportunities that lie ahead.**

We debate the pros and cons of cluster development versus a mode widespread development model for knitwear in India.

**We also showcase the best innovations from leading knitwear brands for the forthcoming season.**

## ALSO IN THE SPORTWEAR INTERNATIONAL SECTION:-

- Menswear Top Trends & Key Items for Fall-Winter 16-17
- Womenswear Top Trends & Key Items for Fall-Winter 16-17
- The World's Best Stores



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# SPORTSWEAR INTERNATIONAL

April 2016



THE  
**SEX**  
ISSUE

**DOES SEX STILL SELL?**

**HE? SHE? ME!**

**IT'S ALL ABOUT THE CUSTOMER**

DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

# SPORTSWEAR INTERNATIONAL



## RETAIL

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Edgar Rosenberger has established vertical as well as multi-channel retail concepts before people were even talking about them. Today, he advises entrepreneurs and corporations with his know-how.



## RETAIL

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The fashion industry in Britain is different- At 70 percent, the proportion of women working in this sector is relatively high. But why is only every fourth management post held by a woman?



## BRANDS

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Why the established fashion marketing model of fueling sales with sex and controversy ran out of date.



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Is gender-neutral dressing reserved strictly for high fashion or is the whole approach also has something for the mainstream? We explore.



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### 181 **Dear Dita...**

Burlesque star Dita Von Teese is the modern erotic icon. With perfectly pale skin, signature red lips and seductive vintage style, she embodies femininity like no other. A quick chat.

Credits for India Capsule

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Creative Director: **Gian Luca Fracassi**  
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# IT'S ALL ABOUT THE CUSTOMER'

*IF ANYBODY IS PASSIONATELY INVOLVED IN INTERNATIONAL RETAIL BUSINESS, IT IS EDGAR ROSENBERGER. HE ESTABLISHED VERTICAL AS WELL AS MULTICHANNEL RETAIL CONCEPTS BEFORE PEOPLE WERE EVEN TALKING ABOUT THEM. TODAY HE ADVISES ENTREPRENEURS AND CORPORATIONS WITH HIS KNOW-HOW. HIS GUIDING PRINCIPLE HAS ALWAYS BEEN TO SEE THINGS FROM THE CUSTOMER'S POINT OF VIEW.*

Interview **Sabine Kühnl** / Photo **Michael Mann**

**A** number of stages mark the career path of Edgar Rosenberger, who has worked in the retail and fashion business for over 30 years, speaks five languages and divides his time between the headquarters of his company in Hamburg and trips throughout the world.

After earning a master's degree in Business Administration in Mannheim in 1977, he launched his professional career in Sweden (at Saab) and France (with the German-French Chamber of Commerce). In 1980 he started to roll out stores of H&M in Germany and was responsible until 1987 as managing director of the German subsidiary of the Swedish fashion giant.

Afterwards he joined Esprit as partner and CEO for its European business and helped the company shift its focus from wholesale to retail. In 1992 Rosenberger founded the vertically integrated retail concept Ipuri, offering contemporary fashion and lifestyle products for men and women. The Ipuri magazine has been named Germany's best customer magazine several times. Since 2003, Rosenberger advises with his business-consulting firm Retail Brand Services companies such as Deutsche Bank, Burda, Jack Wolfskin, Tchibo, Universal Music, Clas Ohlson, Dressmann, Stadium and Reima.

Rosenberger sees himself more as an advisor to entrepreneurs than as a classical consultant for companies. He only accepts engagements involving not only the development of a strategy but its implementation. He helps industry and wholesalers to become

retailers as well as foreign companies to get established in the German market. His third and most sizeable focus is advising private equity interests on international branded consumer goods. In addition, he was appointed in 2011 as adjunct professor at the recognized Copenhagen Business School in Denmark.

Rosenberger spoke with SI about the challenges faced by the retail industry today and how consumers need to be approached.

**In the 1980s, with the introduction of H&M, you established the vertically integrated model in the German fashion market and later transformed Esprit from a wholesaler into a retailer. This was followed by your launching of cross channeling with Ipuri in the 1990s. Currently, verticals like Primark and also major online retailers such as Amazon and Zalando are coming under fire—both groups dominate the market. Does the criticism make sense to you?**

The criticism is certainly justified in part, but despite of all criticism one thing is very clear: in the end it is the purchasing decisions of the consumers which determine the success or failure of these companies. Despite of all their own weaknesses, many of the competitors which criticize Amazon and Zalando, do not recognize the stronger and stronger influence consumers have today.

**What does that mean in concrete terms?**

The textile value chain has become more and more concentrated in recent years. As a result, vertically integrated companies such as

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**“A customer often knows more about a brand or a certain product than a salesperson in a traditional store. It is becoming more and more important for brands to be transparent and to integrate customers into their processes. Even small brands can gain international attention in the Web quickly.”**

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Primark and H&M are in the lead today because they offer better value, are faster and more profitable than traditional retail stores. The advantage of the major pure players on the Web, such as Zalando and Amazon, is both their highly organized logistics and their extensive knowledge about the buying behavior of their customers. With their huge data resources, they are able to provide quickly and with high accuracy, what their customers want and need. Both the verticals and the pure players on the Internet have a mindset very strongly focused on the market and their customers. In the end, it is all about the customer!

**What do these customers look like today and what do they want?**

Today customers primarily want a product range which suits perfectly their needs. They switch back and forth across channels, do online research but purchase offline, or vice versa. Who goes window shopping on Sundays anymore? This is done on the Web now. And brick-and-mortar stores are coming under increasing pressure, because all products are available with the Web everywhere at any time. Additionally customer expectations are extremely high. Relatively speaking, this is true for all target groups.

**Does a template of customer target groups make sense anymore today?** Definitely, but in completely new clusters. It doesn't make sense anymore to segment customers according to age, education and income, as it was done in the past. Today, customers identify with lifestyle grouping which they feel they belong to. They identify where they belong in terms of values and basic orientations. And what they expect from brands is significantly more differentiated than it used to be. People can expect a modern image and high quality today at all levels, not only in the premium sector. Especially the verticals, such as H&M, have contributed very much to the democratization of design.

**It is often said that making money is only possible either in the high-end or the cheap market segment. Is the mid-priced segment dying?**

I don't believe so. The mid-segment between Luxury and Price can be viewed in a more differentiated way, when you break it down into upper and lower mid-market. You have an intense competition in the lower mid-market,

where verticals have a high market share. I still see however good growth opportunities in the upper midmarket. This is demonstrated by the increasing activity of vertical concepts in this segment such as Massimo Dutti, COS and & Other Stories. Interaction among these market segments has become much more intense due to the Internet.

**...and has led to customers now being very knowledgeable...**

Yes, that's true. A customer often knows more about a brand or a certain product than a salesperson in a traditional store. It is becoming more and more important for brands to be transparent and to integrate customers into their processes. Even small brands can gain international attention in the Web quickly.

**Have the major brands seen their best days?**

Not at all. But if they want to be successful today, they need to differentiate their product range more than before and also prove they are good retailers. You need to frame the product from a customer perspective! By offering tailor-made products, niche providers avoid competition and gain market share. Verticals such as Inditex began diversifying their concepts many years ago instead of letting everything run under one brand.

**“Creating emotions” is one of the most common slogans for exciting customers at the point of sale. But how can these emotions be created, especially online?**

It isn't enough for a multibrand retailer to just gather many strong brands at the point of sale. Far more important is how to mix and merchandise these brands and herewith create an own retail branding. Innovation and differentiation are the two key ingredients for establishing a strong USP. As customers become more and more demanding, many traditional retailers cannot meet the increased requirement for an exciting product presentation in their store. To surprise and to excite customers at the point of sale is the basis for good retailing, regardless of whether it is offline or online.

**Who does this especially well then?**

Even if the innovation pace has been weakening with Ralph Lauren in recent years, for me he is still a star. He knows how to stage themes and tell stories. H&M is one of the few fashion companies which really do



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Marketing Ants

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**“Good service is when you aren’t aware when it’s happening. This is when a customer leaves a store or a website with a good feeling. All customers have their own definition of good service, but the general expectations of product and processes have increased significantly in recent years due to the Internet. The best brand story is useless if the staff at the POS do not live it.”**

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well with omni-channeling. I admit, that this is easier for a vertical than for a wholesaler with limited retail revenues of its own. H&M has also shown with brand concepts such as COS and & Other Stories that they can make more inroads into the upper midmarket segment.

#### **Where is there a particular need to catch up?**

The list in that regard is long. There are notable deficits with many brick-and-mortar retailers, especially when it comes to their private labels and with personnel. Retailers are launching more and more private label products on the market, because of the need of low entry price levels or higher profit margins. But very few retailers succeed in making genuine brands out of these labels.

#### **How come?**

They do not succeed in developing a comprehensive brand story with its own product design, graphic, packaging and communication. For years I have been in a clinch now with a major German clothing retailer which is trying to take over the brand Ipuri from me through court actions. This retailer is neither capable of developing its own brand story and attractively presenting it at the POS, nor does it understand the value of a genuine brand. However, there is a vast difference between a lovemark and a label. In addition to private labels, a further major challenge is personnel. You need employees who love their job and want to get things going. Brick-and-mortar retailing cannot get the upper hand against the Internet by cutting down on sales staff or scaling back service.

#### **What do you consider good service?**

Good service is when you aren’t aware when it’s happening. This is when a customer leaves a store or a website with a good feeling. All customers have their own definition of good service, but the general expectations of product and processes have increased significantly in recent years due to the Internet. Amazon stands out for its logistics and customer data in its huge database. In brick-and-mortar retail it’s to a considerable extent the staff which makes the difference. The best brand story is useless if the staff at the POS do not live it.

#### **But what is actually the use anymore? Haven’t we been trained to serve ourselves for years now? Just look at supermarkets, banks, bakeries...**

Yes, but you can’t just lump them all together. Based on their hybrid behavior while shopping, customers make quite different demands depending on their varying needs. The Internet has redefined service and put offline retailing under immense pressure.

#### **The only problem is that it is becoming more and more difficult to find good staff who will take relatively low-paid jobs in the service industry...**

It has never been easy to find good staff in service industries. In addition, jobs at Internet business are more attractive for young people even though there are no better salaries than in physical retail. What is missing at brick-and-mortar retailing are passionate teachers and good job perspectives. The dramatic low demand for apprenticeships in retail is the best indicator that something is wrong. Thanks to omnichannel retailing and retail branding, there ought to be many new opportunities opening up for young people in retail.

#### **What factors need to be kept in mind when creating an innovative retail concept or developing a strong brand?**

The most important success factor is a good product, for nothing works without a unique and innovative range of goods. Thereafter comes the store, in other words the presentation of the brand both offline and online. Good communication and enthusiastic staff are also necessary to establish a strong brand. And last but not least you need effective operations in place, such as logistics, merchandise management and IT. All these success factors must perfectly fit together like the links in a chain. In the end, a retail concept or a strong brand is only as good as the weakest link in that chain.

#### **What about the store?**

For offline, it starts with the choice of the right location and signing a good lease contract. After that come the implementation of the brand concept in the store design and the visual merchandising. How do I make my store attractive with interesting crossovers? And if I can’t manage that on my own, what conceptual third partners do I add if

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**“Nearly 40% of offline customers have gathered information online before they become active offline. More and more of them are using mobile devices such as smartphones and tablets to do so. From the customer’s point of view, omnichannel retailing is a seamless shopping experience requiring the supplier to have a holistic, cross-channel brand presence.”**

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necessary? It is just the same with digital presentation. Here too, a brand must be similarly projected in all its facets.

**Is an online store absolutely necessary for every brick-and-mortar retailer nowadays?**

Not for everyone, but if your customer is cross channeling, you need as a physical store to have also an online store. Nearly 40% of offline customers have gathered information online before they become active offline. More and more of them are using mobile devices such as smartphones and tablets to do so. From the customer’s point of view, omnichannel retailing is a seamless shopping experience requiring the supplier to have a holistic, cross-channel brand presence. Finally it is no longer a matter of the origin of your brand and the question of whether H&M was originally a brick-and-mortar retailer, Boss a manufacturer, or Amazon a pure player on the Web. The only thing which counts for a customer is the value of a brand and the required availability of its product offer.

**What does this mean with regard to a brand’s image?**

First of all, customers expect today credibility from a brand and to an increasing degree also sustainability. The image of a brand is no longer the story told by the company’s PR agency, but the story told by fans and bloggers. A brand company can control the design of its products and stores, the clothing hangers and shopping bags, but the image of a brand is driven by its customers. Once again, it’s all about the customer!

**Well, retailing is fine as far as that goes—but the value chain starts quite a bit earlier...**

It is certainly not unimportant where and at what price the raw materials for a product are purchased and how a product is manufactured. But the moment of truth in the supply chain comes at the point where contact with the consumer occurs, regardless of whether this is online or offline. That is why I feel no doubt that the customer calls the shots more than ever, and that retail is the decisive point in the supply chain.

**But why is it that you still get the feeling that you are surrounded by a lot of boring retail concepts? Is there a lack of ideas?**

No, there are many creative ideas around. The problem in my opinion is their implementation. Either there is no holistic concept or sometimes there is quite simply no money for the investment necessary for implementation.

It is really boring when you always find the same brand shop-in-stores lined up side by side across a lot of multibrand retail space. Fortunately, the success of pop-up stores is adding some surprising moments at stores. Customers love and appreciate that, also on the Internet where you have far more entrepreneurial daring with new ideas. This is also because the financial resources for a company are easier made available online than offline. Courageous start-ups in physical retail face an uphill battle.

**You are thoroughly familiar with the trials of business life. After all, in your own retail project Ipuri you had to contend with insolvency. What was actually the problem at the time and did you feel this was a failure?**

Many people believe that we were too much ahead of our time with Ipuri in the 1990s. That is not my personal view. What made the project fail at that time was that it simply did not reach critical mass. You need some revenue for the success of a vertically integrated retail concept, which is sufficient for the minimum purchase quantities as well as to support the development of its own brand and design. To achieve this minimum level of revenue we would have had to have at least twice the number of stores we had at the time.

We simply failed to achieve this level of expansion. In the US failure is almost a requirement in the life of a true entrepreneur. That kind of experience is a stimulus to do it better next time.

**Having tried it once and done everything right—isn’t there still a factor which cannot be anticipated? What do you need to keep in the back of your head?** When all is said and done, the decisive things are passion and fun. You have to be consumed by an idea and never forget the fun involved in implementing a project. In Silicon Valley the fun factor is one of the decisive components in choosing a job. Nobody counts the hours when you have fun with what you do.

# DEAR DITA...

## What does “dressing sexy” mean in your opinion and what are no-gos when it comes to “dressing sexy”?

I think that to dress sexy should be to dress with confidence. Personally, I think that clothes that create mystique yet leave something to the imagination are sexy. I think that what you wear even underneath your clothes, like beautiful lingerie, radiates and helps you feel sexy, even if no one else sees it.

## As an erotic fashion icon, how would you define eroticism in fashion today?

I like disguised elements of fetishism in fashion, like a very tall stiletto heel in patent leather, an opera length glove in exotic python or leather, a fully fashioned seamed stocking and a nipped-in corseted waist.

## How would you describe your personal style—both on and off camera?

I like to dress the part of the femme fatale... shapely and feminine silhouettes. On camera I love very high heels and off camera I like classic ballet flats.

## What do you think about the current unisex/non-gender fashion trend?

It's not for me, I think it's quite unglamorous. I personally prefer clothing for women that enhances femininity, although I also love certain tailored menswear looks on women.

## What is your opinion on the way young women/girls dress today (thinking trends such as athleisure, yoga pants, casual looks...)?

The solution is to wear athleisure looks that are stylish. I like simple black capri pants, a

slim-fit T-shirt with ballet flats. But I think that after a workout, showering and changing clothes is the right thing to do!

## In terms of “sexy” who are your favorite designers?

Roland Mouret and Hervé LeRoux.

## What is your favorite place/store to shop and what is your favorite recent fashion purchase?

Most recently I ordered a simple black dress from Ulyana Sergeenko. It has a sculptural top, a wiped in waist and a full skirt with a hemline just below the knee.

## When you think of sexy, what fashion cities come to mind and why?

Paris is the number one, of course, because of its long history of fashion and excellence in sewing technique.

## What was the inspiration for your new lingerie collection?

I am inspired by vintage details from my vast collection of vintage lingerie. I adore lingerie from eras gone by, but I also appreciate modern shapes and technological advances in construction of lingerie. I am inspired to capture the beauty of retro style but I believe in reinventing it in a modern and functional way. I can also sometimes be inspired by things I see in fashion; for instance when I go to the couture shows in Paris, I might see a beautiful and priceless gown, and I might create lingerie that is inspired by the color, or the lace or design details. I also love to post photos on my Instagram account and ask people what their favorite colors for lingerie are, or which color I



should do next in the most popular styles, like my Madame X collection.

## What was your first pair of jeans?

I don't wear jeans. One reason I began dressing in vintage was because my parents could never afford to buy me designer jeans like my friends had.

## In your opinion, do you think denim is sexy? What is your favorite fashion “denim moment”?

I can appreciate it on other people, but I personally don't wear it myself. I recall seeing interesting denim interpretations from Jean Paul Gaultier... I even purchased a coveralls look made of peach silk with a built-in bullet bra. That's my favorite “denim but not actually denim at all” moment.

## How do you have THAT body at the age of 43? Do tell!

Pilates and I follow the nutrition advice from Kimberly Snyder's book *Beauty Detox Foods*.

Burlesque star Dita Von Teese is the modern erotic icon. With perfectly pale skin, signature red lips and seductive vintage style, she embodies femininity like no other. Born Heather Sweet in a small Michigan town, the natural blonde transformed herself from Midwestern gal to glamour girl from visions of pin-up posters and stars of Hollywood's Golden Age. Inspired by her mother's lingerie drawer, she developed a fascination with vintage lingerie. Von Teese began performing striptease in the early '90s and her trademark Martini Glass show is now legendary. Whether dressed in Swarovski crystal encrusted costumes or '50s era vintage clothing, she has created a sexy and very chic image of her own. A front row regular, this ex-wife of Marilyn Manson has topped many a best-dressed list including Vanity Fair's International Best Dressed List in 2013. Now a fashion designer and entrepreneur, Von Teese has an erotic empire with her own distinct brands including Dita Von Teese Lingerie, Dita Von Teese Eyewear, Dita Von Teese Gloves, the Dita Von Teese Stocking Collection by Secrets In Lace as well as a fragrance collection, which includes her latest scent "Erotique." Recently, she published her third book, *Your Beauty Mark: The Ultimate Guide to Eccentric Glamour*.

Interview: N. Jayne Seward



# IS SEXISM STILL IN FASHION?

*DID YOU KNOW THAT FEWER WOMEN WORK AT THE TOP 100 COMPANIES IN GREAT BRITAIN THAN MEN WHOSE FIRST NAME IS JOHN? THE FASHION INDUSTRY IS DIFFERENT –AT 70%, THE PROPORTION OF WOMEN WORKING IN THIS SECTOR IS RELATIVELY HIGH. BUT WHY IS ONLY EVERY FOURTH MANAGEMENT POST HELD BY A WOMAN?*

Text **Julia Mönnich** / Illustration **Hiroyuki Kikuchi**

“**T**he fact of being a woman in a field like the one of jeans and denim, predominantly male, has not been easy and still is difficult,” says Lucia Rosin, the founder of Meidea and an international design consultant with more than 25 years of experience in the apparel industry. Why is it that way?

“It could be due to men who in fact prefer being in charge and still take the view that only a man can be the boss,” theorizes Justina Rokita who has held positions with Falke and Hugo Boss and is now CEO at Kunert. This explanation is confirmed by others: “In my personal experience, unfortunately, managers—male or female—prefer to have men in leadership positions reporting to them and women primarily for management defined as more precise, tidy and organized,” says Rosin.

Andreia Pizarro, industrial and development director of the Pizarro Group in Portugal, says: “Sometimes companies have doubts hiring women for key positions because of kids and maybe their not being willing to travel, etc., which is not true.” Sounds like conventional role distribution. But men are not the only ones to blame for this. As Rokita explains, “It could be because women do not feel up to the task themselves or that the biological clock turns out to often get in the way of a career.” Women underestimate the opportunities they have, hesitate to step out of their comfort zone and to take risks. There is a lack of courage, but also not enough supporters, teachers, role models and networks. Grishma Jashapara, managing partner at Fusion Associates, a fashion and sportswear recruitment company in London, says: “There is a much smaller pool of female

candidates to headhunt from. This is exacerbated by the fact that women may choose to have career breaks when they have children so the experience they have built up during a 20-year period before they achieve senior executive would have been interrupted for a few of those years. For a GM type role where a breadth of experience across multiple channels and functional areas is essential, this gap in years could be vital and put them at a disadvantage.”

In addition, she points out: “We have found male candidates more open and able to relocate. Even if they do not relocate the whole family, it is not uncommon for them to base themselves in the country of work during the week and travel home for the weekend. Women are less likely to commit to such an arrangement if they have children.” Kara Nicholas, vice president of product development and marketing at Cone Denim, adds: “I think that if women occupy key positions today, it is a matter of generations and if they reached such goals it is thanks to what other women have worked for before them.”

Nevertheless, there are still women who manage to make it into top management and those numbers are constantly increasing: “There is no doubt that there has been a growing improvement in opportunities for women at all levels within the industry over recent decades,” says Jashapara. Equal rights legislation in many countries as well as regulations on equal opportunity at many companies have made it easier for women to get to the top. In addition, more and more companies have realized that achieving gender balance positively impacts a company from the commercial point of view. The fast pace of change in the working



**“Certain characteristics that usually are connected to women such as sensitivity, emotionality, social skills and curiosity have a positive effect in the long run.”**

— Anita Tillmann, CEO, Premium Exhibitions

world has proven to be an advantage—especially for women: Digitization and increasing flexibility of work, day care centers and company crèches, flexible working hours and working from home help women to remove biologically determined characteristics which far too frequently continue to be viewed as “weaknesses.” Rosin adds, “New technologies will help a lot making ‘no gender’ the future career development.” Anita Tillmann, CEO Premium Exhibitions (and a mother of two), says: “Still, the reduction of duties of working women for example in Germany needs to be further supported. Because in this respect we have not reached the ideal by far. Sweden is a role model when it comes to bringing together family and career. There are absolute equal rights for men and women and the infrastructure for working moms and dads perfectly fits their needs.” The fact that a career path for women is still more demanding and has more pitfalls is seen by the women surveyed as a challenge they want to meet: “I take it as an opportunity for my personal growth; more troubles stimulate more research that develop more knowledge,” says Rosin.

From minor disrespect all the way to obvious cases of discrimination—that is what women have to contend with at work—no matter where they are in the company. “Until today, it happens permanently. But it never really interested or influenced me. A female friend of mine always says, that we are not born to please others.

I was able to use it as advantage that others sometimes underestimated my skills,” Tillmann says. “In my personal experience, as a woman



**“Men’s ability to stay detached and maintain some sort of lightheartedness can sometimes be helpful.”**

— Barbara Grotto, communication manager, Gas

passionate about work who always wanted to lead the way, well prepared academically and through work experience, I must say that I really suffered a lot the first years of my working career, when I was working for a large multinational where I felt first-hand the constant discrimination working women are subject to,” says Rosin. Rokita adds:

“It is generally very hard for a woman to come to terms with discrimination—especially in a management role.” A female insider in a leading position that does not want to be named, says: “Throughout my working career I have received comments that I know men would not get.” One case in point is Carmen Silla, marketing manager at Jeanologia, who senses resistance when talking to colleagues at denim wash facilities. In areas with less emphasis on trades and craftsmen things are different however: “When I speak about brands there is more space left to women.” This shows that there are areas where women are more appreciated than in others. Generally they are welcomed in creative or communicative areas.

What action should be taken? The people we talked to for this piece agreed that professionalism, distance and poise put a stop to the worst

**“Male bosses still have a huge network and would rather recruit directly from there.”**

— Caroline Andersson, CEO, Sandqvist



faux-pas. And if not? “Every conflict strengthens your character and promotes your ability to assert yourself,” says Rokita. “The resistance which occurs forces you to develop further and to grow as a result of these negative experiences and draw positive aspects from them.” Nobody disputes that men and women are different and the reasons for this vary widely, yet should not be downplayed. Women are widely considered as being more adept at communication and organization, are able to handle multitasking and are more emotional. “I think there are some characteristics, such as females being known to be more detail-oriented, that helped me along the way but I haven’t felt an impact, negative or positive, on my career based on being female,” says Kathy Kweon, president of Citizens of Humanity. Barbara Grotto, communication manager at Gas, emphasizes that “men’s ability to stay detached and maintain some sort of lightheartedness can sometimes be helpful.” Rokita says, “Even if it was hard at the beginning to assert myself in a male world, it was very helpful for me—as a woman especially—to integrate the emotional side across processes together with perceptiveness and tough persuasive power in order to achieve the goals set.” Alice Tonello, marketing and R&D manager at Tonello, also sees advantages based on gender: “Sometimes it was helpful to be a woman, because relationships





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**“We have found male candidates more open and able to relocate.”**

— *Grishma Jashapara,*  
*managing partner, Fusion Associates*

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can be established in another way.” Tillmann is convinced that “certain characteristics that usually are connected to women such as sensitivity, emotionality, social skills and curiosity have a positive effect in the long run and make women stand out from the crowd. We as women have the advantage that we combine professional competence and female intuition.” Jeanologia’s Silla says what many others agree with: “The best thing is when in a team one can combine the best from both sexes.” Typical male attitudes such as the corner office on the top floor with many windows (and very far away from the rest of the workforce)—creating this kind of distance has long been passé as has an old-school hierarchical style of management as well. Personnel management must become more horizontal, something women come to terms with better. “Instead of meetings which go on for hours, now reporting has to be done regularly,” said Janina Kugel, head of personnel for technology enterprise Siemens, in an interview. And something more has changed: Regardless of sex or sector, the 24/7 workaholics are a dying breed among young graduates and work-life balance is already being brought up by young job candidates in interviews. For example, the German trade magazine *TextilWirtschaft* completed a survey about attitudes toward work among 1,600 entry-level fashion industry employees, of which 85% were women. Sixty-four percent of those surveyed said: “If I have children later,

I want to cut down on my workload.” That’s makes a good explanation why so many female careers get stuck after some time. There is one more reason why more men than women make it to the top, even though this very reason is difficult to be grasped, since hardly anyone talks about it, especially not in public: “At a certain point on their way to the top women automatically hit the limit, a point without any further chance to move ahead,” a woman in a leading position at a big fashion company who looks back on a highly successful career path tells us. Still, it’s obvious that the next logical step is refused to her (and other females). And this is not because she does not want to get further or because she would not

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**“[...] men prefer being in charge and still take the view that only a man can be the boss.”**

— *Justina Rokita, CEO, Kunert*

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**“Sometimes it was helpful to be a woman, because relationships can be established in another way.”**

— *Alice Tonello, marketing and R&D manager, Tonello*

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be able, but simply because she is being stopped from doing so. “As a woman from a certain level on you cannot get further ahead—no matter how good you are in your job.”

Caroline Andersson, CEO Sandqvist, says: “Male bosses still have a huge network and would rather recruit directly from there; this stands for fashion as well as many other industries.” Also others mention such “boys clubs,” groups that deny access to women simply because they are women. Especially in European companies this is still the case says a female business insider: “In the USA at contrary it’s your performance and skills that count—not your sex. There are networks and platforms for women where values such as equal rights really do exist.”

This shows that the way up to the top is not easy for women—and in fact it still seems to be a taboo to openly and publicly discuss this matter which explains why many of our (male and female) interview partners did not want to be mentioned by name in this article.

But still, in the fashion business more women make it into leading positions than in other business sectors. “I think that the fashion sector has a more open mentality, gives more opportunities and lets women express their abilities better than others,” says Mario Dell’Oglio, owner Dell’Oglio in Palermo and president of the Italian Buyer Chamber. Also Kweon of Citizens of Humanity thinks: “It’s great that in the denim industry we see a lot of women in key positions such as designers, creative directors as well as on the business side.” That’s fine, but not enough. Instead, also women need to have access to every position, up to the top level and not only in theory.

# DOES SEX STILL SELL?

*WHY THE ESTABLISHED FASHION MARKETING MODEL OF FUELING SALES WITH SEX AND CONTROVERSY RAN OUT OF DATE.*

Text **Oliver Horton**

**T**its and ass have been fashion's selling tools for at least the lifetime of this magazine. But as consumers take control of their identities and personal marketing via apps such as Instagram, the established model of fueling sales with sex and controversy feels out of date. Protest power is on the rise, with advertisers' sexism a frequent target for Twitter rage and Internet parody. These are revolutionary times.

The re-emergence of androgynous styling is a slap down to heteronormal 21st Century sexuality. Despite a more liberated male attitude on the streets to color, hair style, stretch fabrics and quickfire looks, the mass media image remains gym-hewn toughness: take your shirts off and tell us about it, James Bond and Thor. Women, meanwhile, are at their most sporty and get-go in the day-to-day, but Barbie Beyoncé makes the headlines. Is sex the desperate final play of old media?

Calvin Klein Jeans has always held sex close to its heart, from Brooke Shields to its a/w '15 campaign, which explores the modern phenomenon of sexting. The MyCalvins hashtag links Underwear and Jeans collections and deliberately pushes interactivity online. "When our consumer comes to shop it's mainly because of our marketing and our sexy appeal," says Jessica Dorfman, men's denim designer. "We have a lot more social media because we have a new marketing team. It's a lot more on Instagram, we have our own blog and there is way more online presence, that's where we're picking up our consumers. We are a modern sexy brand."

Calvin Klein Jeans is planning a push for s/s '17 that ties marketing to "a new sexy fit" that specifically enhances its consumers' physical allure, both men and women.

Guess has celebrated sex appeal since its inception. Breakthrough campaigns were influenced by movie icons of the 1950s and 1960s, but co-founder Paul Marciano says his modern inspirations are online: "The fast evolution of social media and the Internet has changed marketing drastically. Today everyone can express themselves. I am fascinated by Instagram and in the past year I have discovered many of my recent campaign models here."

The Calvin Klein Jeans and Guess approach to sexuality endures because the allure is twinned to something deeper—for Calvin Klein a stylized rebelliousness and for Guess a celebration of powerful womanhood. But fashion is used to playing by its own rules, and not always in a good way, creating images that would never fly

in other sectors' marketing, from Gucci's pubic hair to the porn-referencing American Apparel. Even brands that are now studiously conservative, such as Lee Jeans, have put sex on show as they sought a broader audience.

"Sex sells. Sex will always sell," says marketing consultant Sean Pillot de Chenecey, who works with brands including Samsung, Heineken and Starwood Hotels via his agency, Captain Crikey. He cites the November '15 closure of the UK's "laddish, juvenile" magazines FHM and Zoo as an example of an attitudinal shift, like Playboy's recent renunciation of nudes.

For a fashion brand, competing on sex alone invites comparison to Tinder or XHamster rather than attachment to the edgy world of style. Sex catches attention at a base level. But consumers remember the breasts not the brand. Clark Edwards, creative director at advertising agency AMV BBDO, says: "People are less inclined to be sold to. Advertising now is more about having a conversation with people, rather than just talking directly at them. Sex is quite a blunt tool. But it's all still about the idea. If it's insightful and powerful, then it will resonate—whether it has sex or not."

Legendary denim designer François Girbaud says that fashion can never be sexy while its practices are suspect: "What we are concerned about in the denim industry is conserving natural resources, saving water, energy and people's lives. But this is not sexy for the consumer.

We need evolution of the woman, we need evolution of the man. When you have stretch denim that gives the camel toe or is so tight it makes the legs like sausages, this is not sexy. We need new silhouettes and real design for these times, instead of always looking to vintage and all dressing the same."

Pillot de Chenecey says: "Sport, beer, cars, soft drinks have all adapted to a marketing model that is stylish, funny and sexy. Only fashion and music haven't changed—and that's because fashion marketing people and music marketing people tend to stick to their industries, they haven't worked in other sectors, so they are not really educated about marketing." He cites the deodorant brand Axe, also known as Lynx, as offering a roadmap for fashion advertisers. He says: "It's boy meets girl, the oldest story in the world. But it's presented deliberately tongue in cheek, so everyone is involved, everyone can enjoy it. Smart and funny is the way to go."



# He? She? Me!

*IS GENDER-NEUTRAL DRESSING RESERVED STRICTLY FOR HIGH FASHION OR IS THE WHOLE APPROACH ALSO SOMETHING FOR THE MAINSTREAM? WE ASKED FASHION PROFESSIONALS HOW MUCH POTENTIAL THEY SEE IN THE GENDER-BENDER TREND.*

Text **Julia Mönnich** / Photos **Amos Mac/& Other Stories**

As always, the whole thing really got going on Facebook. In early 2014, Facebook users in the US were given the option of choosing not only from between male or female for their personal profile, but also given about 60 more options for specifying their own gender. These options were introduced in other countries later as well. Agender, transperson, cisgender man, cisgender woman, gender-fluid: these are only a few examples the American company offered as options. Facebook said it had added the options “out of respect for gender diversity.” Sixty different variants—though most of us probably assumed the two categories of male and female were already enough.

But it isn't that simple after all. At the same time the first transgender models such as Lea T, Andreja Pejic and Hari Nef (the latter is pictured together with Valentijn de Hingh throughout this article in a 2015 lookbook by & Other Stories) walked down international fashion runways and were booked for international campaigns. The New York City-based retailer Personnel of New York in the West Village uses “Men,” “Women” and “Everyone” as headings for its online shop. Transgender citizens such as Caitlyn Jenner and Chaz Bono can be seen on glossy magazine covers photographed by celebrities such as Annie Leibowitz, and the New York Times ran headlines such as “The Great Gender Blur” after fashion shows. Further signs of the times include the opening of the first agency for trans-models and the openly gender-fluid orientation of Miley Cyrus. What all these examples show is: People are talking about what defines genders and the disappearance of traditional roles for men

and women. This is an emerging topic in fashion, in society and in the Western world. Göran Sundberg, designer and senior lecturer at Beckmans School of Design in Stockholm, says, “I believe that no-gender, and all sorts of gender for that matter, is a central topic in fashion at the moment. It has infiltrated collection concepts and the way fashion is presented; it has even found its way into distribution and sales.” Miuccia Prada, one of the most discerning designers with a keen eye for developments in society, also said recently: “More and more, it feels instinctively right to translate the same ideas for both genders.” Incidentally, she has long included unisex looks in her collections. That is why we are wondering what has become of the conventional categories man/woman. What consequences does this have for fashion? Is cutting through traditional roles something reserved for the eccentrics and off-the-wall rich or is there something about agender looks which also has potential for the mass market?

That fashion has reshuffled and rearranged the deck on gender roles is not new—consider for example the Baroque and Mozart-like outfits, the androgynous looks of the 1920s, and those of Jimi Hendrix or David Bowie. And in the 1980s and 1990s there were many prominent genderless looks, not only by Prince, but also by Grace Jones and Annie Lennox. That androgynous looks are being shown on international fashion catwalks just now is of course due to the upsurge of interest in '60s and '70s themes at the moment. Experimenting with genders was already being done intensively 30 or 40 years ago. What is different today though is that the clear distinction

between menswear and womenswear has been completely abandoned on fashion runways.

In an interview with the New York Times, Opening Ceremony founder Humberto Leon said that five years ago this could not have happened in this magnitude. Tommaso Pecchiolo, owner of Gerard Loft in Florence, says: “Things have got mixed up in recent years, this has meant both creating new styles, more linear, regular, geometrical, but also re-evaluating old items, their shapes and materials, which is of course what happens all the time in fashion, yet there is something different nowadays, boundaries are falling down, the world has become smaller, thus the boundaries of gender are falling apart, too.”

But why is that happening now? For one, society has been swept up with everyday casualwear and doing away with suits and ties. When sportswear and leisurewear entered the fashion world and our daily lives, unisex looks became a part of our lives too and helped to blur gender boundaries. For a long time now, no distinction has been made between what women and men wear in sports. This is demonstrated by the designs and colors of running pants from Nike or Under Armour. Because jogging sweats and tank tops have left the gym and go everywhere we go too, looks for women and men have converged to become increasingly similar. Whether woman or man—most of us love dressing casually and have gotten a little more laid-back—but that is only part of why the no-gender topic is popping up everywhere.





Something else has happened too: The high (and very professional) degree of interest young people take in how they dress and look is unprecedented. They use fashion to work on the image they project, but that in itself is still not what is new. The new development is that their experience with fashion is not happening outside anymore—such as at clubs or on the street—instead, it's taking place online, a place which has become far more exciting than the street. And something else has changed: Young people have always turned to clothing to set themselves apart; that is why fashion needed clear codes which allowed a sense of “we” to come through—examples include punks, mods, Teds, Rockabillies, skaters, hip hoppers, German Poppers, average Joe “Normalos” and their clear-cut dress codes. You needed to have the right jacket, the

right hairstyle, the right label to look like the others in your in-group—even if it was only to be a part of male or female groups. That is different today. Today clothing brings out individuality. Every selfie, every image posted from somebody's vacation, from the soy latte or newest look should be unique and individual. They do this to show how they see themselves individually and want to be perceived by others. The borders between personal and public become completely indistinguishable.

However, it is also the case that “youth fashion”—something we've been thoroughly familiar with for decades—may no longer exist. Instead, the fashion industry is picking up on even the most minor new trend and markets it for the mainstream. Regardless of their age, everyone is putting clothes on as if they're not quite grown-up.

This means that the categories “young” and “old” are no longer distinguished. And that is why young people have lost one of their most important sparring partners. If a mom squeezes herself into a sexy pair of skinny jeans and puts on a really close-fitting blazer and the most popular sneakers, it's no wonder her daughter will look for her own new hot topic which is different. What choice does she have? And it is new and different when, after getting rid of the “young” and “old” categories, the categories “man” and “woman” also go out the window.

That is the one thing.

The other one is that today the aspect of “me” or the individual is so powerful that the categories of “man” and “woman” are no longer needed to present yourself. This then is how the lines between the sexes are becoming more and more blurred with the Z Generation.

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**“I believe that no-gender, and all sorts of gender for that matter, is a central topic in fashion at the moment.”**

— Göran Sundberg, Beckmans School of Design

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This is not without consequences for fashion: “Good fashion always remains open to its surroundings. The gender discourse works well with the modern consumer identity—I have the right to define myself, as a consumer,” says Beckman School of Design’s Sundberg. Japanese designer Naoki Ichihara of Talking About The Abstraction adds, “It is natural that no-gender is focused on social issues such as giving women greater opportunities.” Designer Yoshio Kubo, who collaborated with Opening Ceremony on a unisex collection, says, “People are tired of wearing a typical silhouette for both men and women.” Gerard Loft’s Pecchioli even goes one step further: “People don’t want to stick to labels and names anymore, every single person is looking for something, and that search is often reflected in what that person is wearing. People want their own style, labels and strict rules in clothing are now too narrow for people.”

This could also be a reason why so many young people concepts such as Uniqlo and Muji are so popular, because they use no labeling at all. Alexander Graah, co-founder and CEO of the Swedish label Dr. Denim, has yet another even more pragmatic explanation for why traditional roles have begun to fall by the wayside: “There’s been a surge in the acceptance of secondhand clothing where sizing and fitting becomes a factor to experiment with, allowing and encouraging consumers to create interesting looks outside of the usual gender paradigm.” Graah also identifies social media as an additional and fairly daunting building block which has overridden traditional consumer behavior: “Social media has put more fashion power in the hands of consumers, partly allowing consumers to take greater ownership of trends and partly shifting the power balance relative to designers and brands.”

Unisex as well as rejecting clearly defined codes, is not being perceived as a weird marginal phenomenon, especially not by the youth target group. Quite the contrary, says Graah: “Among modern, culturally aware twentysomethings, it’s not a topic—it’s something completely natural that is neither provocative nor mindboggling. Among those born and raised in previous decades, on the other hand, who struggle to keep up and distance themselves from traditional gender values, it can seem like a big thing and that’s probably why some perceive it to be a bigger topic than it is.”



But what does all of this mean for the fashion business? Can the success of the frilled blouse for men by Gucci also work in the wider market? It can. Sundberg puts it this way: "Genderless collections have already been sold at retailers such as Weekday, and the biggest denim retailers have introduced campaigns with trans content. More nuance will be applied to traditional gender roles, but it will above all result in an acceptance of different gender identities that weren't present before." And Asos, Topshop and Zara, too, are already offering masculine double-breasted pants suits for women, a look which had been banished from stock lists and wardrobes during the trend toward casual clothing, one-piece fashion items and, at the latest, with the resounding success of jogging pants in everyday wear. That casual pants suits are now being sold by vertical retailers means that the once onerous business outfit is now totally in fashion. This shows that vertical players are already successfully playing with gender roles.

Other labels have long overcome gender roles of the past and discovered a new area of business for themselves. For years now, Assembly New York has been producing identical garments for men and women in different cuts, and so has Telfar. Graah of Dr. Denim says: "We've done genderless jeans since we started back in 2004. It's part of our DNA. We're launching 'Blaze Denim Bomber' in spring 2016—a perfect genderless item that's all about the style and nothing about the gender of the wearer." LA-based 69 creates unisex cocoon garments and tunics which stars such as Rihanna sometimes wear. Collection 002 has introduced a unisex outerwear line, 1.61 is also a gender-free label from New York and Nicopanda is the gender-neutral streetwear label of Nicola Formichetti. The styles presented by Gucci designers Alessandro Michele and Rick Owens, Ann Demeulemeester and Rag & Bone, A.P.C. and Vince are also helping erase the lines of demarcation between menswear and womenswear. For many of these retailers, designers and labels the difference between apparel for men and for women is often only a question of the size.

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**"There are still many fashion brands out there who are sadly out of touch with the times, promoting very sexist views of women, but they will find it increasingly difficult to get away with it in the connected age and that's a good thing."**

—Alexander Graah, co-founder and CEO, Dr. Denim

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Granted, these are often small, specialist concepts with unique looks for special customers. But there is no denying the fact that when Hedi Slimane took over the design department at Dior Homme in 2000, the androgynous looks he created quickly became bestsellers for men and for women. And it did not take very long at all before menswear became narrower, straighter and more androgynous at H&M and J.Crew. And there is no overlooking the many young people in city centers and shopping malls who, wearing narrow down jackets, really narrow jeans and sneakers, look just like their girlfriends.

What can be said is that some kind of message or signal for breaking down and reinterpreting traditional gender codes seems to in fact have reached the commercial market. Of course, the classic male/female role assignments still dominate fashion retail. "There are still many fashion brands out there who are sadly out of touch with the times, promoting very sexist views of women, but they will find it increasingly difficult to get away with it in the connected age and that's a good thing," says Graah. No-gender looks and collections are the exception, of course. Pecchioli says, "I guess that this kind of research dedicated to no-gender style is still quite exclusive, that is

for the fashion workers, who are constantly looking for something more, something new, but it could eventually become mainstream, because it's slowly becoming established in the wider market, and it is easy, elegant, simple and surprisingly, new." He, too, sees an opportunity for gender-neutral looks to gain a foothold in the mainstream market. Retailer Brian Teeling of Nowhere Store in Dublin also sees the chance for this topic to go mainstream as well. But he says: "For me, it's a trend that will fade away a lot faster than others—mainly due to its strong lack of identity, or brands that adhere to its convictions. These trends take a while to reach the mainstream market. Once there, people will steadfastly lose any interest they might have had and move on to something more contemporary." Jolanka Rotika of Kunert also says: "I do not believe that no-gender topics can be established around the world, and doubt that people can live by them. The event people dress for and their habits about what they wear will continue to determine what look people choose." Graah also fears that "as long as we have physically and mentally separate design teams, buying teams and departments for men's and women's clothing, it's difficult to see these structures take on any larger scale for the foreseeable future."

Whether men will put on a dress for a festive occasion is rightfully being doubted on many fronts. And the oft-cited Gucci ruffle-edge blouses for men are mostly being purchased by women now. And there are certainly major differences between regions when it comes to whether, where and to what extent no-gender topics will show up. Still, there is no denying that our societies are changing. How people see themselves as individuals, how they treat themselves and others is constantly shifting. What probably will never change is that fashion notices these changes and formulates a response in some way. People really should be willing to let themselves try new roles, new codes and new ways of staging fashion. Why? Because everyone has to wear clothes—whether they're a he, she or me.





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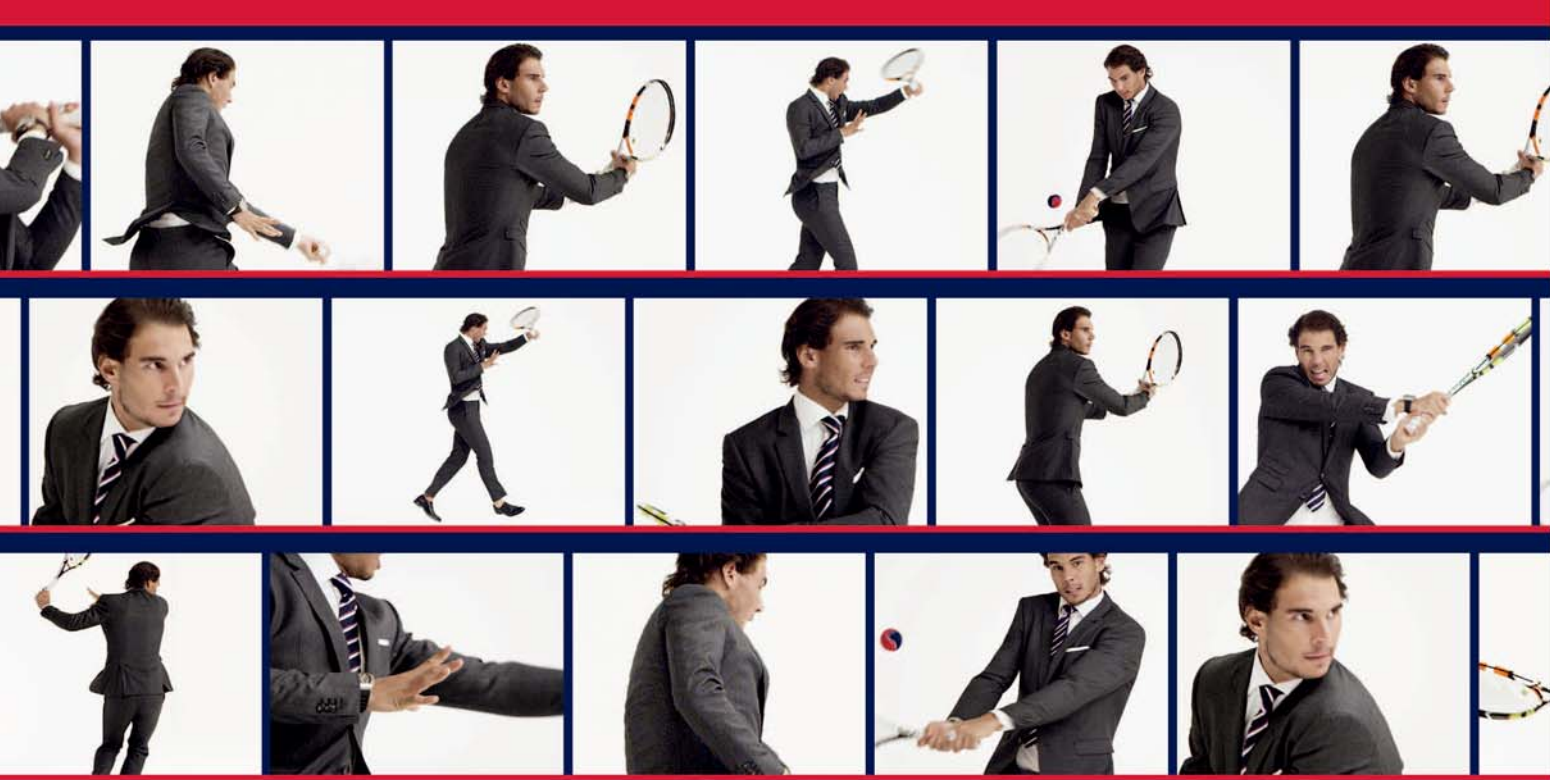
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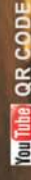
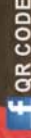




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