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Issue No.

BUSINESS OF FASHION

May 2017

Volume XVIII // No. 5 // ₹ 100
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A REPORT >>

<< IMAGES FASHION AWARDS 2017
MEET THE WINNERS >>



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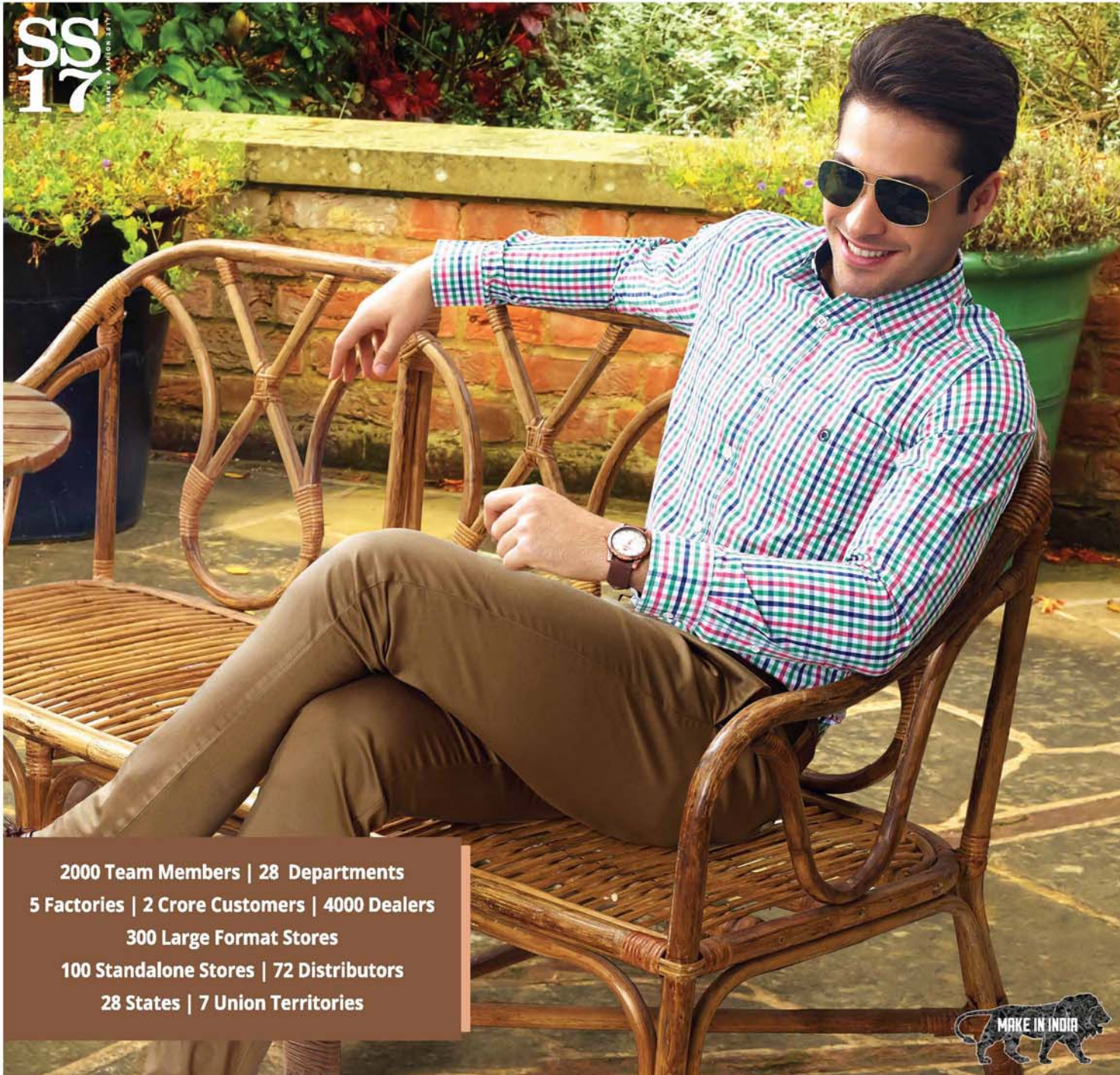
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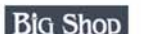
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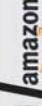
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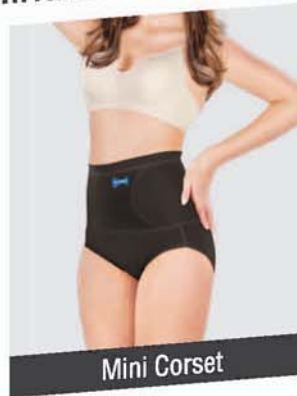
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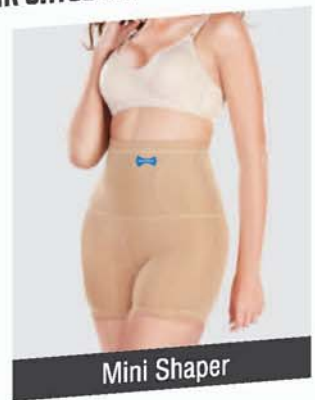
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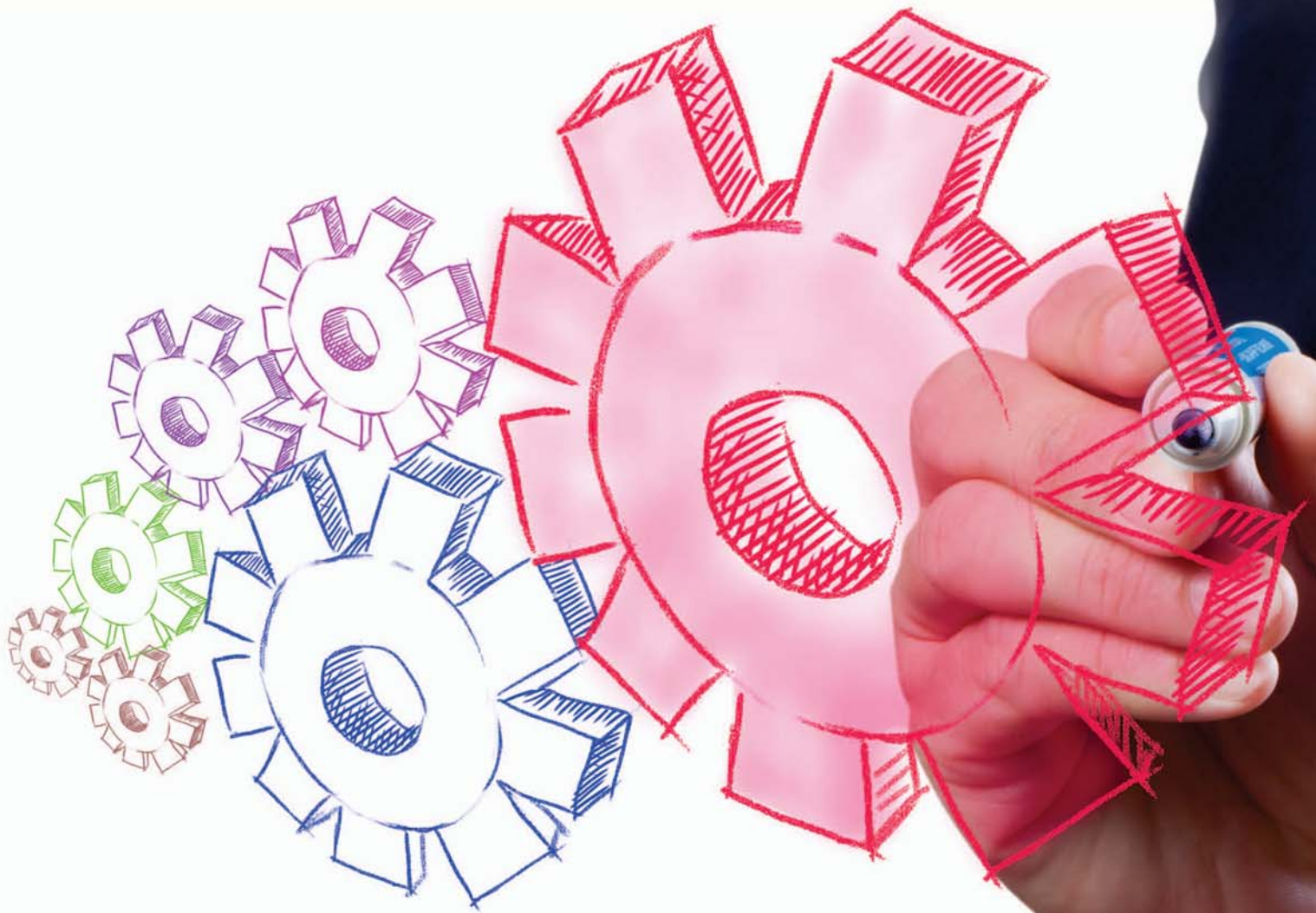
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Dear Friends,

Fashion is ever changing. With changing trends, changes in consumer perspectives, and a very technology led and digitally influenced retail market, it is imperative for the entire value chain of the fashion industry to quickly adapt to these changes to keep the big wheel turning. And to swiftly attune oneself, assimilation of the pervading changes is indispensable.

The 17th edition of the India Fashion Forum was unique in as much that it moved a long way forward in crystalizing upon the core tenets driving of this dynamic business. Going by the great content and insights that were laid before us, I am sure the future for fashion in India is indeed bright.

IFF 2017 was a great success and I want to thank all our key partners—Inorbit, Infinity, Select Citywalk, Arvind Group, Raymond, GATI, The Woolmark Company, Deal Jeans, Philips, Accenture, Pretr, Raysil, and TRRAIN; as well as our knowledge partners Technopak, Facebook, WGSN, PwC, Kantar IMRB, AT Kearney, BCG, Wazir; all IFF Exhibitors, India Brand Show participants; the speakers, panelists and all IFF delegates for their support. BS Nagesh and Bijou Kurien were once again our great mentors and in particular, I wish to thank one person—J. Suresh—the chairman of IFF '17. Last year, when I was with my good friend, and past chairman of IFF, Kabir Lumba, the MD of Lifestyle, we had a chat on who should lead the next India Fashion Forum and instantly we both knew it had to be J. Suresh. What he has done with Arvind and how he built and managed the whole new lifestyle and retail

business is inspiring. Thank you, dear J. Suresh for helping us build the agenda for IFF 2017 and being such a wonderful leader.

India is indeed a unique shining market in the world today. While fashion businesses in the west project grim scenarios on immediate growth and the Chinese slowdown is further cause for concern, it will be a very rare global fashion player who does not have an eye on the Indian market.

And within us, in India, the optimism, dynamism and creativity was best at display at the Solo Xpress session where some of the foremost Indian fashion leaders shared their journeys. That session was my own very personal takeaway from IFF'17, and I promise you that I came out truly inspired by that evening session. I assure you an even bigger and better IFF'18.

For those who missed the event, this issue of Images BoF brings you a detailed report on all the key sessions and deliberations at the India Fashion Forum 2017. I strongly recommend that you, dear reader, go through the issue with a pen in hand, quickly marking of insights that are of actionable value and ideas that are eminently replicable or inspiring.

Thank you once again and God bless!



Amitabh Taneja

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To whomsoever concerned - or not,



In business, 25 years is an age, they say. I know what they mean. Especially when I look back to the summer of 1992, when a journey that was to take several rapid twists and turns over the next two decades and more, began in New Delhi.

Back in the early '90s, I used to be coordinator for several fashion stores' advertising campaigns and creatives. During those assignments, I would typically end up having long conversations with the retailers themselves. And each encounter left me impressed, but also wanting more. Each of these retail and fashion brands and their promoters - from **Ravi Nanda** of the posh Heritage store in South Extension to the mega family outlet Big Jo's **Deepak Bhargava** to Shapes' **Ashwini Anand**, from Chunmun's **Sharad Suri** to Numero Uno's **Narinder Singh** - was an innovator. Each entrepreneur - from **Hemant Jain** of Killer Jeans to **Prasad Pabrekar** of Spykar, **Sanjay Dhanuka** of Sumangal, the late **Haribhai** of Moustache, **Jitubhai** of Jade Blue, **Rahul Mehta** of UPO Jeans - had such a rich hands-on understanding of consumer behaviour, of store design, of navigation, sourcing, cost management, you name it. But these insights were scattered, unrecorded. And just like it is today, no retailer had all the pieces. They were all operating in silos - with small, but crucial, gaps in their exposure. If only they had a way to access each other's intelligence!

I was sure a business magazine that assembled all this intelligence together - along with inputs from specialists in fashion creation, marketing and retailing - would have tremendous relevance in a market where fashion consumption was about to explode! And so, in May of 1992, IMAGES was born.

It wasn't easy, I can tell you that. We printed 3,000 copies of the first edition of IMAGES, funded by the sale of my motorcycle (a Hero Honda Sleek, a gift from my mother on my previous birthday). I was sorry to see the bike go, but I was more excited about the potential start of retail intelligence in India.

I think we set the tone in the very first issue itself, with visual spreads on fashion forecasting and trend analysis by **Rajiv Goyal**, and an industry article on Fashion Sourcing by **Anchal Jain**, who wrote: "The only way a multibrand, multi-product retailer can provide the 'right choice' to the customer is by being fashion-literate himself." The insights were sharp and remain relevant to this day. Sample this from Heritage founder, the great **Ravi Nanda**: "Rather than being a follower of consumer demands, it is better to mold tastes by setting trends."

There were over 24 advertisements in that debut issue itself. How did I get them? I think none of the brands I pitched to refused simply because the idea itself was too radical! They were clearly very curious as to what was being created here and were carried away with my passion and conviction of the idea!



The lovely 'Santoor girl' Priya Kakkar graced the cover of IMAGES' first ever product, and the then-Minister of State for Textiles Shri Ashok Gehlot, kindly sent a congratulatory note, which was published in the magazine.

From a time when product durability was king to now, when 'fashion' has taken over 'product', India's fashion consumption story is an epic tale. As I look back, I feel overwhelmed, and filled with a sense of wonder, that IMAGES has been not just a cataloguer, but also a catalyst in many ways, in promoting the knowledge and the intelligence that drives retail today.

Because, in the years that followed, IMAGES' world expanded fast -- from fashion retail as a subject to Retail as a universe. My own understanding was shaped, enriched by some incredible visionaries and pioneers, including B S Nagesh (who launched the first Shoppers Stop store in Andheri the same year as our story began); Kishore Biyani, the game-changer of mass retail; Madura Garments' Vikram Rao; Siyaram Silk Mills' Ramesh Poddar; Tata Group's Simone Tata; Landmark Group's Renuka Jagtiani and Raza Beig; Anuj Puri (then at Chesterton Meghraj and until recently, JLL India head); Krish Iyer (then at Pyramid Retail and now the head of Walmart in India) and many other amazing leaders who have each played a role in modern Indian retail's creation.

For me, along the way, there have also been many losses and misses in this 25-year-old pursuit of passion. (In a related note, have you seen The Pursuit of Happyness? Watch it!) But then, the word passion is derived from a Latin word meaning 'to suffer'. If you have a genuine passion for something, you will also suffer for it. If you're lucky enough to find a passion that consumes your every living breath, you must also be prepared to let go of some things that you don't want to lose.

Has the journey been worth it? Well...

Amitabh Taneja
Founder

IMAGES
GROUP.IN



LETTERS TO THE EDITOR

I love getting the Images Business of Fashion magazine every month. Its a pckage of articles and features that update us with the latest trends and latest developments in the market. The article, 'Global Fashion Brands Entering India' was really insightful and interesting.

- Soumya Tondon, Designer, Bengaluru

I am a fashion retailer in New Delhi. The April issue of Images Business of Fashion, which featured some of the leaders and successful entrepreneurs in the fashion and retail industry, was very inspiring. Its great to read about these triumphant leaders and about their journeys to the top position. Their ideas and visions help us retailers to excel further in our business.

- Sunil Singh, Retailer, New Delhi

I have this innate love for trendy jewellery. They simply fascinate me. The elaborate article on 'jewellery' in the April issue of Images Business of Fashion, was a great read. I loved how the writer had covered various subjects related to jewellery, in the write-up. Secondly, I was delighted to know that the industry is the second highest employer in India and contributes immensely to the country's GDP. This has made my love for jewellery/designer jewellery more intense.

- Rima Seth, Housewife

I've been an avid reader of your magazine for years now. In spite of being a business magazine, the presentation of the pages and everything is really attractive and nice. The April issue was simply a great read. I would request you to print more interviews of many other successful entrepreneurs and leaders from the industry.

- Riddhima Dixit, Businesswoman, Udaipur

Images Business of Fashion imparts immense knowledge to its readers. The magazine charts new territories with every passing issue. I truly appreciate the content which are very well written and well researched.

- Parag Jalan, Shop Owner, Lucknow

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Gate Fold

Special Insert

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ROCKSTAR JEANS

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»» **MILANO UNICA
XXIV EDITION**

»» **LIVA CRÈME LAUNCH**

»» **LULU FASHION WEEK 2017**



LAUNCH

Birla Cellulose Launches LIVA Crème

Kumar Mangalam Birla, Chairman, Aditya Birla Group, launched LIVA Crème, the new age fabric from the group, in a LIVA Accredited Partner Forum (LAPF) partner event.

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CAMPAIGN

EURO FASHIONS' NEW BRAND

AMBASSADOR: SIDHARTH MALHOTRA

Euro Fashions Inner announced the Bollywood actor as its new brand ambassador with the launch of its latest commercial 'Start Something Sexy'.

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COLLABORATION

Status Quo Joins Hands With Baahubali Franchise

Status Quo announced its association as the official fashion partner for the Baahubali franchise and launched an official range of 'Baahubali' apparels for men.

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FASHION WEEK

Lulu Fashion Week 2017

The Lulu Fashion Week at Kochi witnesses ramp walks, brand lunches, fashion shows, inspiring conferences and an award ceremony.

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SHOW

Milano Unica XXIV Edition - A Report on

The XXIV edition of the Iconic Italian Textile and Accessory Trade Show - Milano Unica held at Fiera Milano Rho presented latest collections, and new strategic and technological changes in the textile-accessory industry.

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L to R: **Rajeev Gopal**, CMO, Birla Cellulose; **Kumar Mangalam Birla**, Chairman, Aditya Birla Group; **Dilip Gaur**, Business Director- Pulp & Fibre

BIRLA CELLULOSE LAUNCHES ITS NEW PRODUCT LIVA CRÈME

LIVA Crème, the new age fabric from the Aditya Birla Group, was launched recently by Kumar Mangalam Birla, Chairman, Aditya Birla Group in a LIVA Accredited Partner Forum (LAPF) partner event held in Mumbai.

The event was launched amidst a lot of fanfare and glitterati with Bollywood actress and LIVA Crème brand ambassador Kangana Ranaut walking the ramp. The event also hosted a fashion show that showcased exclusive Spring/Summer'17 collections of Allen Solly, Van Heusen Shoppers Stop, Biba and Pantaloons made in LIVA Crème fabric. The collections were designed by renowned designers Nikhil Thampi, Shivan-Naresh and Ka-Sha for Allen Solly, Van Heusen and Shoppers Stop respectively.

Speaking on the occasion Kumar Mangalam Birla stated, "I recount that when we set out on this journey, our vision was to create value for the entire value chain of viscose based fabrics. I am so pleased to say that the ecosystem of our LAPF partners has resulted in also placing India on the global map. We are now a preferred sourcing destination of viscose based products. This is truly in the spirit of the 'Make in India' initiative of our honourable Prime Minister."

He further added, "One of the finest examples of customer centricity within the Group has been our VSF business. From being just product focused, the business has moved superbly to "providing solutions" to customers by working seamlessly with the value chain. LIVA's end-to-end ecosystem of a high quality product, continuous innovation, the LAPF



Designers Nikhil Thampi, Karishma Shahani Khan, Naresh and Shivan



network and aspiration created by communication and brand engagement is a great case study in consumer focus.” Birla’s next innovation - LIVA Crème fabric has the core promise of LIVA embedded in it. Coupled with it are the enhanced features of luxurious fineness and softness. In spawning Liva Crème, he, complimented the LAPF partners who he said have embellished the product with their experience and expertise.

“I am so pleased to say that the ecosystem of our LAPF partners has resulted in also placing India on the global map. We are now a preferred sourcing destination of viscose based products. This is truly in the spirit of the ‘Make in India’ initiative of our honourable Prime Minister.”

–Kumar Mangalam Birla
Chairman, Aditya Birla Group

Speaking at the launch, Dilip Gaur, Business Director -Pulp & Fibre said, “It is always our endeavor to offer something new to our customer. LIVA Crème fabric has all the attributes of LIVA fabric while offering the added benefit of luxurious soft feel. The fabric has found tremendous response from women consumers, as per a research conducted in Mumbai and Delhi. The proposition of luxurious softness has been crafted basis their feedback.”

On the growing business of LIVA Rajeev Gopal, CMO – Birla Cellulose quoted, “Overall, the designer associations with leading brands to create exquisite LIVA Crème collections, a stunning campaign with Kangana Ranaut and premium point of sale communication will all work towards positioning LIVA Crème as a premium brand in the minds of consumers.”



EURO FASHIONS INTRODUCES **SIDHARTH MALHOTRA** AS ITS NEW BRAND AMBASSADOR

Premium innerwear brand, Euro Fashion Inners (popularly known as Euro Fashions) announced Bollywood Actor Sidharth Malhotra as its new brand ambassador with the launch of its latest commercial, which endorses the new tagline, 'Start Something Sexy'.

Euro Fashion's association with Sidharth Malhotra comes at a point when the brand is growing rapidly to make its presence felt in the knitwear industry in India and abroad. Euro Fashions is one of the fastest growing innerwear brands catering to the premium segment. The brand had been launching various new products and adding to its distribution network in order to consolidate its foothold in the consumer market globally.

Rajnish Agarwal, Brand President, Euro Fashions, said, "Euro Fashions have signed up Sidharth Malhotra as its brand ambassador. Sidharth brings in a dash of freshness to the brand and stands for everything that clearly defines the attributes of Brand Euro, viz., young, sexy, stylish, cheerful, aspirational, innovative and consistent. We are very kicked up about this association and hope to have an exciting journey with him."

Commenting on his association, Malhotra said, "It's great to be associated with Euro Fashion Innerwear and be a part of their revamped collection. Their products have cutting-edge designs, innovative fabrics, exceptional fit and quality. It's youthful disposition and appeal is what led me to join forces with the brand."

Euro Fashion is about to launch its first TVC with brand ambassador, Sidharth Malhotra. "We are all set to launch



the new Euro TVC with Sidharth. The ad presents Sidharth at his flirtatious best. He's looking absolutely dashing and handsome, and perfectly brings out the essence of brand Euro," adds Agarwal.

The new Euro advertisement opens with Sidharth Malhotra wearing Euro inners and sipping his morning cuppa. He then pulls up a pair of chinos and leaves the house to tour across the city on his bike. Clad in a stylish Euro vest, he immediately becomes the centre of attraction with all the girls staring at him. The commercial ends on a captivating note with Sidharth uttering 'Start Something Sexy!' and the girls following him. The background score, which emphasises on Euro Fashion's new brand tagline, beautifully sets the mood for the commercial and helps the plot unravel.

The new ad campaign will be launched in the digital platform at the onset; however, gradually encompassing television, outdoor and print for publicity.

Euro Fashion Inners is a premium innerwear brand from the House of Rupa with an ever growing client base.





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STATUS QUO JOINS HANDS WITH BAAHUBALI FRANCHISE



– Bobby Arora,
Managing Director, Status Quo

Status Quo, one of India's leading apparel manufacturers, announced its association as the official fashion partner for the Baahubali franchise. The brand launched an official range of *Baahubali* apparels for men, designed on popular and lead characters of the film including Baahubali, Bhallala Deva, and Kattappa among others.

The initial line includes t-shirts and features a range of designs combined with Status Quo's signature style. The limited edition collection will also feature seasonal line updates. Status Quo retails through 1,100 MBOs and all leading LFSs and online stores throughout India. The Baahubali range is available across key stores like Shoppers Stop and Central and will be priced from ₹899 onwards. Moreover, innovations like HD prints, ombre prints have been introduced in the range.

Bobby Arora, Managing Director, Status Quo, said, "We are extremely happy and excited to be associated with the Baahubali franchise as their official fashion partner. The response for Baahubali as a film franchise has been tremendous and we are expecting a similar response to the apparel range especially since South India is a very important market for Status Quo. The designs are unlike any Indian film has seen before. In a competitive landscape of apparel industry, this association marks a key milestone in our growth story. We are really excited to see how our customers will react to the collection."

Shobu Yarlagadda, CEO, Arka Mediaworks, "We are excited to be partnering with a brand like Status Quo. Status Quo is a great fitment for a franchise like Baahubali as their strong retail and distribution presence will help us reach fans across the country and keep alive the Baahubali craze!"

Black White Orange is the brand licencing partner for Arka Mediaworks' National Award winning movie. Bhavik Vora, CEO & Founder at Black White Orange added, "When we created the style guide for Baahubali with SS Rajamouli, we wanted to create designs where each art would tell a story and bring alive the world of Baahubali. We stitched a perfect partnership when we collaborated with Status Quo, who gave life to this vision and depicted the true essence of this brand."

Baahubali: The Beginning, released in July 2015 in India and Indian diaspora territories, has grossed a massive USD 92 million while *Baahubali 2: The Conclusion*, released on April 28, 2017 became the first ever Indian film to gross over ₹1,000 crores (USD 155 million) in all languages in just ten days. 'Brand Baahubali' is targeting ₹20-25 crores of retail sales alone from their merchandising and licensing revenue.



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L to R: **NB Swaraj**, Media Coordinator; **Shafi**, Film Director; **Amala Paul**, Actress; **Dulquer Salmaan**, Actor; **Tovino Thomas**, Actor; **MA Nishad**, Director, Lulu India; and **Sibi Malayil**, Film Director.

LULU FASHION WEEK 2017

BRINGS UP THE GLAMOUR & FASHION QUOTIENT WITH TOP BRANDS

Lulu Fashion Week, a unique platform to bring together more than 30 popular fashion brands on a common platform, ushered in the Spring/Summer 2017 line of various brands setting a new trend on the contemporary fashionlandscape, at the 5-day event in Kochi.

Now in its second year, the event has nearly doubled in scope, because of the overwhelming success of Lulu Fashion Week 2016. Lulu Fashion Week is unique because this is one of the rare fashion events that is open to public and not a restricted event at a private venue. Its a platform that not only brings top brands together but also enjoys public visits and interactions, celebrities and performers as well as the most respected names in the fashion industry. International supermodels headlined the event, which put the spotlight on the looks to watch out for in 2017.

The fashion week kick started with the logo launch by Charath Narasimhan, CEO, Indian Terrain, the lead sponsor of the event. The extravaganza was inaugurated by actors Bala and Anjali Nair, who is also a state award winner. The official

theme music specially composed by music director Rahul Subramium was also unveiled to the public during the inauguration. This year's Lulu Fashion Week also saw an adorable audition for child models and a showcase of the latest trends in kidswear. The showstoppers for the event included top celebrities and models like Bala, Vinay Fort, Rahul, Deepankuran, Sooraj Kurup, Sidharth Menon, Vijay Madhav, Manasa, Shalin Zoya, Hari, Lakshmi, Archana Ravi, Gourav Menon, Rajesh Keshav, Shanthi, Rony, Rajeev Pillai, Rasna Pavithran, Mareena Michael Kurisingal, Rithu, Vivek Gopan, Neha Saxena, Kicha, Sharanya, Regen, Swasthika, Aparna Balamurali, Anna, and John Kaipalli.

Inspiration for Fashion Students

The Lulu Fashion Forum is also one of the main events that the fashion students across Kerala looks forward to the most. It is a platform for design students to interact with top management and sought-after industry professionals. This year too, the forum came through as the perfect platform for students to learn from the top management of brands and other experienced professionals from the fashion and retail industry – a first of its kind opportunity that no other fashion event in Kerala offers. The topic of discussion was Fashion Retail 2020 – New Concept and Retailing Trends.

The forum registered the presence of about 170 students from across 12 leading fashion colleges across Kerala. The panel members for the Fashion Forum included, Bhavesh Pitroda, COO, IMAGES Group; Hitesh Bhatt, Director-Marketing and Communication, Retail Authority of India; Rajanish Nair, Brand Head, Van Heusen; and Divya Dutta Gupta, General Manager- Marketing, Victorinox.

Launches

As part of Lulu Fashion Week, Lulu Fashion Store launched the premium line up of designer kurtis under the brand name 'Amara', inspired from the Greek name meaning 'eternally beautiful'.

Amara is specially created for the new generation of Indian women, exquisitely combining traditional designs with contemporary fashion. Amara has been designed keeping in mind women who want good quality designer wear at affordable prices. The line up highlights the natural organic theme focusing on the Spring/Summer season. The line up is a fusion of ethnic colours in contemporary fashion. The logo of Amara was unveiled to the public by the Honourable Mayor of Cochin Corporation, Soumini Jain.

Lulu Fashion Awards 2017

Working tirelessly towards empowering brands, Lulu Fashion Week concluded its second edition on April 23, 2017 at the Lulu Mall Atrium with the Lulu Fashion Awards that gave recognition to popular and upcoming brands in various categories based on public voting. Amongst the special awards was a new category created for 2017, the Pride of Kerala Award, which seeks to honor an individual in the fashion or movie industry who has brought much pride to the region. This year's Pride of Kerala recipient was Dulquer Salmaan for his contributions and achievements in the Malayalam film industry.

COMPLETE LIST OF WINNERS AND RECIPIENTS ARE AS FOLLOW:

- **Most Preferred Men's Wear Brand:**
Levi's
Received by: Gopakumar A.R, Area Sales Manager of Levi Strauss India Ltd
- **Best Emerging Men's Wear Brand:**
Sin
Received by: Hareesh Nairk, Business Head, Clothing Culture Ltd.
- **Most Preferred Women's Wear Brand:**
Identiti
Received by: Mohammed Rehan, CEO, Global Clothing Pvt. Ltd.
- **Best Emerging Women's Wear:**
Biba
Received by: Renish Paulson, Distribution Head of Kerala, Biba Apparels Pvt. Ltd.
- **Most Preferred Kidswear Brand:**
Indian Terrain Boy
Received by: Santhosh Kumar, Area Sales Manager and Mohit Saboo, Channel Partner of Indian Terrain, Kerala
- **Best Emerging Kidswear Brand:**
Allen Solly Junior
Received by: Ginto, Manager, Lulu EBO
- **Most Preferred Men's Essentials:**
Crocodile
Received by: Sankar Hariharan, Business Head, Crocodile India
- **Most Preferred Women's Essentials:**
Caprese
Received by: Althaf Ibrahim, Area Sales Executive, VIP Industries Ltd.
- **Fast Growing Apparel Brand:**
Classic Polo
Received by: R. Shivram, Executive Director, Royal Classic Group
- **Most Innovative Fashion Brand:**
883 Police
Received by: Seetharaman Kannan, Country Head, 883 Police and Deepu Chacko, Brand Development Partner, 883 Police
- **Best Teenage Brand:**
Teen19
Received by: Rakesh Karia, Managing Director, Teen19 Clothing
- **Fashion Magazine of Year – South:**
JFW
Received by: Bina Sujit, Editor, JFW
- **Fashion Icon of the Year – Male:**
Tovino Thomas
- **Most Influential Style Icon of the Year – Female:**
Amala Paul
- **Pride of Kerala:**
Dulquer Salmaan





Cristina Tajani, Councilor for Fashion, Municipality of Milan



Ercole Botto Poala, President, Milano Unica

MILANO UNICA XXIV EDITION

A REPORT ON THE ICONIC GLOBAL TEXTILES AND ACCESSORIES TRADE SHOW

-BY RAJAN VARMA

“The 25th edition of Milano Unica will be an additional confirmation that the route focusing on innovation and quality is the winning one not only from an image perspective, but also in terms of the commercial and marketing results obtained. This route, meant to make Milano Unica the perfect vehicle to showcase the excellence of Made-in-Italy and Made-in-Europe production, needs additional action, but we are confident and positive. Milano Unica will increasingly become an exhibition to show excellence, innovation and creativity to the world, confirming that fabrics and accessories – above all those Made-in-Italy and also a selection of the best Made-in-Europe products – represent the starting point for inspiration of international fashion”.

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

The XXIV edition of the Italian Textile and Accessory Trade Show – Milano Unica held at Fiera Milano Rho presented the new strategic and technological changes in the textile-accessory industry. The show was more technologically advanced, more modern, featured a new layout, and was restyled based on the experience accrued in the new Fieramilano Rho location. The new exhibition path was completely redone with an eye on functional optimization. Transfers were facilitated by the newly developed interactive APP, which enabled visitors to locate exhibitors and their position in an easy and systematic way. Moreover, badges were scanned at each stand, to better measure traffic flows and optimize product category breakdown. Milano Unica was supported by the Italian Ministry for the Economic Development to increase exhibitors’ international visibility and was sponsored by ICE Agency, the Italian Trade Promotion Agency, and Sistema Moda Italia.

THE GRAND INAUGURAL SESSION

The inauguration ceremony, introduced by Ercole Botto Poala, President of Milano Unica, was attended by Cristina Tajani, Councilor for Fashion at the Municipality of Milan, Claudio Marenzi, President of Sistema Moda Italia, and Ivan Scalfarotto, Deputy Secretary for Economic Development. Looking ahead to the Future, Ercole Botto Poala, President of Milano Unica, shared that it was a tough year for textile businesses and he was happy that the latest edition had showed an increase in the exhibitors and also for the next edition date being brought forward to July from September. “It should be the endeavour of the Milano Unica to work with top quality clients and especially



Claudio Marenzi,
President of Sistema Moda Italia



Ivan Scalfarotto, Deputy Secretary for
Economic Development



Jag Gill from Sundar



Silvio Albini, Past President, Milano Unica

Development Agreement) and sessions to promote Italia know-how will be fostered.

Cristina Tajani, Councilor for Fashion at the Municipality of Milan reiterated the support of the Municipality of Milan to Milano Unica. She appreciated the forwarding of the date and said it was a good thing to anticipate the trends. She invited the support of the private sector to invest in the city of Milan. She said, "Textiles is very important for Milan with the industry going back to the 17th, 18th and 19th centuries".

working with the emerging markets. China and Hong Kong are already the largest markets for the Italian textiles and Milano Unica with the support of Minister Carlo Calenda, Minister of Economic Development and Simi created the Milano Unica Shanghai office," said he. He added that the US market had issues with duties. "In emerging markets Russia is difficult, Africa still needs to develop its potential and in India the power is in the hands of very few families."

Jag Gill from Sundar gave a short presentation on the MU365 platform. MU365 is an interactive platform dedicated to selected clients. This platform set up in collaboration with Sundar, aimed to create one-to-one contacts with the exhibitors daily, at any time, from any time zone. It offered a great opportunity for the businesses to learn how to promote themselves efficiently and in a multifunctional way.

Claudio Marenzi, President of Sistema Moda Italia applauded the efforts

>

"MU365 is an asset that Milano Unica offers to the industry to enable a multichannel opening, while increasing the efficiency of traditional commercial channels."

-Ercole Botto Poala,
President, Milano Unica.

"Milano Unica is the hub for inspiration and updating. The hub for young ideas and styles. The hub where fashion is born. This is the new international fashion observatory, where the key asset is individuality and the peculiarity of the individual. The Italian Textiles and Accessories Trade Show is an example of trade show innovation in the sector."

-Ercole Botto Poala,
President, Milano Unica.

He also spoke about Milano Unica to connect with all exhibitors 24x7, 365 days a year and not just during the day of the exhibition. He said, "To incubate this we must invest in new technologies and adopting start-up technical companies is good for the entrepreneurs." In terms of highlights, 'Back-to-School' in which the designers connect with 750 students at Milano Unica, and announced that a special inspiration session by Sir Paul Smith, and CRDA (Co-operative Research and

and initiatives led by Ercole Botto Poala. He also spoke about the growth in businesses with USA and of the negative peaks. He also elaborated a bit on the interesting subject of Donald Trump coming into power and stated that, “Even if Trump fights China and the Italians profit a bit, the market will still be the same. He felt Italy must be more supportive to the developing markets on basis of reciprocity.” He added, “In the recent years Italy has lost a lot and people get angry when they feel they are loosing and then popular movements begin. But we do not want an Italian Donald Trump.” Claudio also announced that the European Parliament had declared its support for ‘Made-in’ as a concept for European businesses and so ‘Made-in-Italy’ would have the support of entire Europe. “Be bolder, work harder together,” he said.

Ivan Scalfarotto, Deputy Secretary for Economic Development said that while movements like Brexit were happening elsewhere Italy has taken a stand and was not afraid of being too European. He also spoke about the need to carefully support cultures of inclusion and avoid things which have made the Mediterranean area a graveyard. He also spoke about how China was changing with the emergence of a very strong middle class and the adoption of superior production processes was helping it become a hi-tech producer. He said, “China is not going to be just a huge market but a competitor in manufacturing too.” He spoke about the need to leverage skills and to develop networks. He appreciated the Erasmus programme by the European Union. He also spoke on the need of the all major exhibitions to co-operate and also converge. He even wanted the exhibitors to support this convergence and that Italians must exhibit in Milan, not in Germany. He elaborated on the work done in Florence and Rome and how supporting trade processes in Italy will also create an Italian pipeline.



THE MILANO UNICA SHOW

The XXIV edition of Milano Unica witnessed the participation of 365 of the best Italian and European exhibitors who showcased their SS2018 collections, developed to meet the needs of the ‘capsule collections’ and the increasing demand of the diversified markets and targets. These exhibits in the production of textiles and accessories, together with 40 Japanese and 22 Korean exhibitors took the total count of exhibitors to 427 out of which 128 were foreign. The 2017 show was in line with the 2016 edition in terms of participation of foreign businesses. Particularly important was the return of companies from the Russian Federation (+34 percent). A growing trend was observed in the participation of companies from the UK (+4 percent), USA (+2 percent), Canada (+29 percent) and China (+6 percent), despite the concurrent occurrence of the Chinese New Year.

The trade show had a special area called the ‘Trend Village’ consisting of a colourful and technological ‘Trend Area’ and also the ‘Vintage Area’ presenting retro trends. The ‘Aree Sintesi’, visual catalogues of exhibitors’ signature products were located close to the entrances and were equipped with touch screens showing virtual catalogues of all the products presented in the trade show.

The businesses that participated in the 24th edition of Milano Unica had effectively interpreted the themes presented during the SS 2018 trend Road Show with various innovative and interesting proposals. The three macro themes - “Nefertiti in Ibiza”, “Malevich in Sorrento” and “Mollino in Teheran”- provided insights for a personal and detailed study, stimulating businesses to present original and relevant products in terms of workmanship, design, graphics and colors.

To celebrate the 24th edition of Milano Unica, a concert of Mario Biondi took place at the Foyer of the Centro Servizi of Fieramilano Rho, in a setting



Mario Biondi, Italian Soul and R&B Singer

which, traditionally, served to exalt the marriage of art, food, wine and culture.

A key focus of Milano Unica XXIV were events targeted at young talents, like the 'Back to School' special featuring Sir Paul Smith who led a seminar on 'You can find inspiration in everything' for students of fashion schools. 'Magazzini Aperti' showcased the projects developed by the seniors from ten selected schools.

SIR PAUL SMITH'S PRESENTATION

Over a thousand students of international fashion schools, and many stalwarts of the industry loudly cheered as Sir Paul Smith burst through the door at the other extreme end of the auditorium of the Centro Servizi of Fieramilano Rho, and sprinted onto the stage.

Born in 1946, Sir Paul Smith the founder and owner of the explicitly British brand that runs in his name enjoys cult status in Japan, which is the company's largest international market. Overall, the brand is wholesaled to 66 countries and has own shops London, Paris, Milan, New York, San Francisco, Los Angeles, Antwerp, Hong Kong, Singapore, Taiwan, Korea, U.A.E., besides many in Japan. Sir Paul was knighted by Queen Elizabeth II in 2000 for his services to British fashion. He continues to be an integral part of the company as both designer and chairman and is involved in every aspect of the business and as a result his brand retains the soul of a single person's touch which large brands often lose.

Sir Paul ran the mesmerized audience through his life and career. He spoke about how cycling was the only thing he cared for as a young boy and how an accident was a reason why the world of fashion and not cycling is blessed with a genius like him. He spoke about his first job in one small room office, to a



Sir Paul Smith. (In Background: His most photographed store in L.A.) Biondi, Italian Soul and R&B Singer

shop that was equally small. He shared about being hugely inspired by Edward De Bono. He spoke about how people think they can change their work places but 'it's' the job that changes you - you never change the job. He shared how for some time he had to undertake work to sustain himself and only found two days in a week to work on what he really wanted to. He reiterated upon the need to empower one-selves to follow one's dream— The need to 'make room to break the rules'.

A large part of his presentation was on the fashion ideation and creation process wherein he ran the young audience through how to seek and find inspiration and how to interpret and create fashion that works.

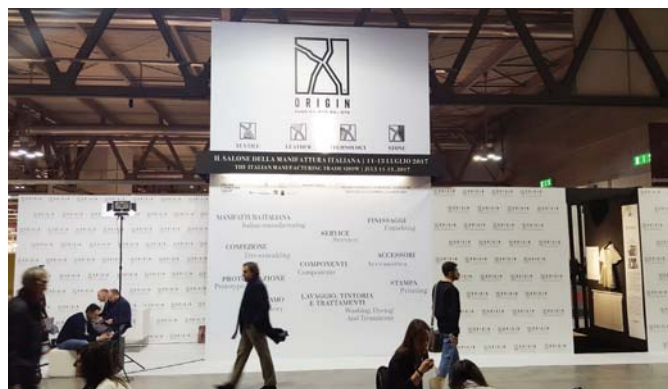
IDEABIELLA AT MILANO UNICA

The 77th edition of Ideabiella showcased 63 Italian and 11 foreign collections, with

3 new entries for the Spring/Summer season 2018, during the 24th edition of Milano Unica. Ideabiella is a most prestigious international fair dedicated to the top quality classic and evergreen textiles. The exhibitors had shared more growth for woolen textiles, cotton, linen and silk as compared to past years.

Alessandro Barberis Canonico, President, Ideabiella shared "For 2017 we foresee a continuation of the positive trend of our exports, in consideration of the positive estimates regarding growth on a global level but also thanks to a stronger dollar. There is some concern about the increase in raw material costs, in particular wool and cotton. There is also uncertainty linked to the recognition of the market economy status of China, which could bring possible dumping practices onto a European level. Finally, fears could come





from possible aggravation of work force costs deriving from the renewal of the national contract in the sector.”

JAPAN OBSERVATORY

The Japan Fashion Week Organization (JFW) in cooperation with the Japan External Trade Organization (JETRO) operated the Japan Observatory in collaboration with Milano Unica.

The section displayed graceful elegance of Japanese beauty, enriched by seasonal natural wealth, along with cutting-edge technology. In the textile field, delicate fabrics imbued in craftsmanship and elaborate skills uniquely established in Japan, were beautifully displayed.

The observatory was a convergence of 40 specially selected Japanese companies and groups, PR and trend booths, which showcased trends and presented highlighted fabrics from the exhibitors. The section featured premium-quality fabrics, products of unprecedented innovation and the spirit of craftsmanship.

KOREAN OBSERVATORY

The Korean Observatory at Milano Unica XXIV, presented 22 Korean exhibitors, including 5 newcomers with their most qualified products, in association with the Korea Textile Trade Association (KTTA) and Korea Trade-Investment Promotion Agency (KOTRA).

Inside the exhibition area, Korea Observatory displayed outstanding featured products to showcase the upcoming 2018 spring/summer season’s fashion trends. The visitors could go through the various themes, colors, and print patterns designed using pure materials from Korea. Highlighting authenticity, functionality, creative combination, and sensitivity of texture, Korean exhibitors also suggested various easily-usable textiles to the buyers. Clothes produced were displayed to help the visitors to understand the final look. Specially prepared products were featured in the “Small Order” section and Quick Delivery items in “See Now Buy Now” section. The Korean companies had made great efforts to upgrade their textiles, concentrating on formulating natural textures by showcasing new complexes produced with cotton, linen, and acetate yarn. There was an

impressive display of future-oriented creative materials, delicately laminated and coated. They also presented various scratch materials or knitting materials which could be applied to athleisure and lounge wear.

ORIGIN PASSION AND BELIEFS

Origin Passion and Beliefs presented a preview of the July 2017 show dedicated to five Italian manufacturing companies - Atelier Stimamiglio, D’Orica Ltd, Liliem Embroidery, Weaving Stebor Srl and La Colombina specializing in services and expertise in textiles, leather, technology and stone. Promoted by the Italian Exhibition Group Spa, Origin Passion and Beliefs was the platform that brought together the finest aesthetic and craft expertise of the masters of Italian manufacturing for the benefit of the fashion and style segment, connecting them with the decision makers - product and operations managers, style offices of the top international brands in the fashion industry and offering them a synergic production chain in an environment in which global visibility was assured. The preview was held in the hall of the Italian manufacturing sector of fashion and accessories at the textile show in Milan.





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KEY EXHIBITORS

BANCA SELLA

Banca Sella once again partnered with Milano Unica to support the development of businesses in their innovation and development processes as well as in catching the new opportunities provided by the technologies and markets and for internationalization of the textile enterprises. The 'foreign service' offered by the bank was created to respond to the demands of the enterprises, to assist them on a six months programme for identifying new opportunities and developing new solutions.

THE WOOLMARK LAB

The Woolmark Company presented 'The Wool Lab Spring/Summer 2018' at the XXIVth edition of Milano Unica. The Wool Lab was an innovative seasonal guide to the best wool fabrics and yarns in the world. It showcased real samples of commercially available fabrics aligned to the season's macro-

themes. The visitors were taken on a virtual trip to an Austrian farm, which was an amazing experience.

LINEN DREAM

LABLinen Dream Lab was an area for experimentation and inspiration featuring technical innovations in linen. A platform displaying creative perspectives for the use of linen fibers. Where European designers, manufacturers and retailers who use linen could meet, exchange ideas, discover new possibilities and stimulate their imagination.

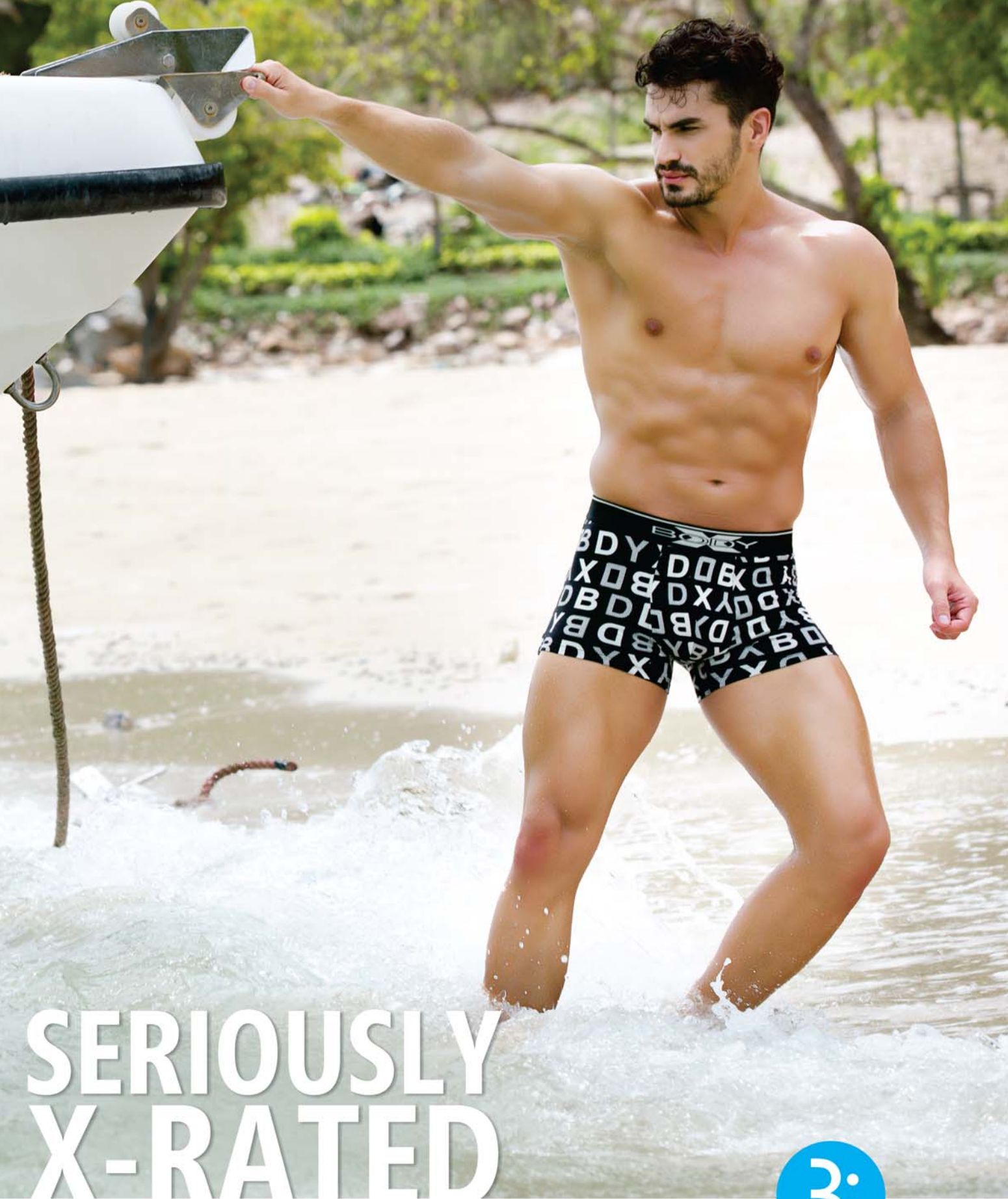
BOTTO GIUSEPPE

Botto Giuseppe showcased their 2018 Spring Collection which was an expression of innovation and modernity. The light wool suit was enhanced by its stretch properties, which was adaptable to every occasion. Fabric comfort paired with innovation in basic designs coupled with an elegant and refined touch. The collection featured matt fabrics embellished with relief patterns,

honeycomb weaves and seersucker graphic design techniques, canvas thickened by wool and mohair yarns. The designs ranged from jacquard patterns with micro and macro optical effects to wools enriched by colour effects resulting from dyed silk yarns. Linen too was a star of the collection with a hint of pure or blended materic chic and double-faced fabrics, which were even lighter for increasingly less conventional uses.

JOSHUA ELLIS

Yorkshire based Joshua Ellis is renowned the world over for producing the finest handcrafted cashmere and woolen cloth, fabrics and accessories by luxury fashion houses in over 23 different countries. The Joshua Ellis Spring 2018 Fabric Collection features a 'Lux' theme offering luxurious lightweight cashmere coatings and unlined jackets for men and women. Woven in British classic designs, the fabrics reflect summery shades, Riviera stripes and glen checks. It also features



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lightweight cashmere worsted suitings in finest refined checks and semi plains. They have also launched 'Spring 2018 Escorial Collection' comprising new suiting fabrics in 100 percent Escorial, plus qualities blended with silk or summer kid mohair.

SIC.TESS SIC

Tess Spring-Summer 2018 collection offers easy to use products, in new classic designs with graphics enriched by structural and chromatic components. Delicate transparencies created by airy and floating patterns; satin fabrics in intense colours; zephyr bases, with a panama effect and with an uncommon light and rich look; mélange on summer bases; prints on unusual bases; light, soft fabrics; false plain in poplin, pin-point and panama with

small graphic and weaving effects. The colour palette consists of lively, joyous and bright shades of turquoise-blue, yellow, green and lilac. Red shades have become cleaner and more intense. Pink has been replaced by lilac. Tess targets the luxury and super luxury market.

TESSITURA MONTI

A worldwide leader in premium quality shirting fabrics, Tessitura Monti's Spring-Summer 2018 collection focused on light-weights and cotton yarns with a very fine and compact counts. A rougher touch was given by the irregularities of linen, both in classic and stronger colours. The hand feel was basically soft, the look was wavy and creased even for light fabrics. The collection's colour palette was divided into four main chromatic areas- Core

Colours (light blues with a touch of red, grey and beige); Tropical Paradise Colours (vibrant, bright and intense colours); Jungle Colours (green and blue hues); Creamy Colours (pastel tones). The main highlight was their 'Brezza' collection divided into two parts- 'Brezza all seasons' presenting an exhaustive selection of light-weight and comfortable fabrics with a Mediterranean and fresh taste; and the 'Seasonal Brezza' consisting of soft cottons and linens developed with unique wavy effect, typical leno weave effect, voiles textured in piquet, etamine, oxford and satin. Leno weave and jerseys made from NE 80/1 cotton yarn were newly introduced.

×

COURTESY TOWARDS COVERAGE OF MILANO UNICA 24TH EDITION

Images Business of Fashion thanks Milano Unica and Italian Trade Agency for their sponsorship of travel and hospitality towards the coverage. Also the entire management, General Manager, Massimo Mosiello, 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") and Rajan Varma.

iff INDIA FASHION FORUM 2017



>> INDIA FASHION FORUM 2017

A REPORT ON THE BIGGEST FASHION CONFERENCE OF THE YEAR

>> SOLO EXPRESS PRESENTATIONS OF FASHION CEOS

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AWARDS 2017**

A report on Images Fashion Awards 2017 - the premier recognition for excellence in fashion business in India.

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INDIA FASHION FORUM 2017: THE FASHION CONFERENCE OF THE YEAR

BY RAJAN VARMA

For 17 years now, the India Fashion Forum has been at the vanguard of fashion retail intelligence in India, acting as a focal point for fashion leaders and stake holders to converge every year with a single-minded agenda of learning, sharing, evolving and together catalysing the growth of the fashion value chain – from the fibers and yarns right up to retail post purchase.

Attended by powerhouse brands, retailers, c-level professionals, consulting and forecasting firms, academicians and other experts from across the global fashion fraternity, the IFF creates unparalleled opportunities for networking and learning through a world-class mix of keynote addresses, panel discussions, c-suite round-tables, workshops, and knowledge series sessions. All of which are juxtaposed to an environment of meaningful exhibits by key retail enablers and innovators, and an ambiance inspired by the edgy India Brand Show and the inspiring Images Fashion Awards.

IFF is widely considered the chief instigator of a fashion forward India. The event benchmarks a new high every year, and the 2017 edition hosted at the Hotel Renaissance on the banks of the Powai lake in Mumbai on the 12th and 13th of April, revolved on four power nodes – Analytical Fashion, Buy Now, Sell Now, Compliant Trade, and Digital Retail.

Fashion businesses are ever changing, and as Prashant Gupta, President & CEO, abof.com put it, “there is no silver bullet ... it is a treadmill business where you have to keep running (even) to stay at the same place”. With fashion retail now evolving at a hitherto unprecedented pace, the two-day extravaganza featured a coalesce of knowledge



with the growing influence of technology, digitization, and consumer centricity as top current focus areas. Adoption of technology for enhanced customer experience, seamless integration of retail channels, need for personalisation, and fostering transparent and compliant trade practices within sustainable, socially and environmentally responsible eco-systems, were other key issues. The Consumer Experience (CX) Forum and Solo Express presentations by fashion CEOs were key highlights of IFF 2017, as were the Knowledge Series presentations by top fashion consultancies.

For those who missed the event, IMAGES BoF brings you a detailed report on the key sessions of the mega fashion conference at the India Fashion Forum 2017. 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. This is followed by a report on The India Brand Show 2017 and Images Fashion Awards 2017.

IMAGES BoF thanks the team from Pearl Academy, Mumbai comprising Tanvi Kapoor, Rashika Gupta, Pratiksha Jondhale, Pooja Amba Chaudhary, Divya Bharat Parekh, and Tanvi Aghera, who most ably supported us in putting together this report.



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IFF CHAIRMAN'S WELCOME ADDRESS AND INTRODUCTION TO 17TH EDITION OF INDIA FASHION FORUM (IFF)

BY GURBIR SINGH GULATI WITH RASHIKA GUPTA, PEARL ACADEMY



—J. Suresh

Chairman IFF 2017,
MD & CEO - Arvind Lifestyle Brands Ltd. &
Arvind Retail Ltd.

JSuresh, the Chairman of IFF 2017, in his welcome address highlighted the momentum that the fashion retail market has gathered in the recent years and advised all stakeholders to stay focussed on the progress and changes. “India is the world’s fastest growing major fashion market and is populated by the demanding, aspirational, globally-connected and the emerging living-for-now consumers. The success formula, is to stay focussed to take advantage of this growing market,” he said.

The success of the fashion industry, especially in contemporary times, is pivoted mainly on two things – technology and sustainability. International retail bigwigs are already working on these two areas and the Indian retailers should also start imbibing this in their business models.

J. Suresh further elaborated upon his thoughts on the ABCD for success in the fashion industry – Analytics, Buy Now, Compliance, and Digital.

Analytics: It is extremely important for a brand to know about the consumer, understand their needs, what is selling in the market and align their modus operandi in compliance of these findings. The data should be more research oriented rather than based on emotions or gut feeling.

Buy Now: Brands should focus more on cutting down the total turnaround cycle and tweaking their supply chain in a manner that the consumers can see and are able to buy at the same time. Longer cycles of 6-9 months are out and are definitely not going to work in the current competitive scenario.

Compliance: Compliance towards sustainability, both environmental and social has now become imperative for any brand or its business. Sustainability is no longer just a buzzword; it is now an expected standard, so recognising the rise of eco-efficiency is crucial.

Digital: Technology is now the biggest ally in meeting the expectations of today’s digitally-powered fashion consumer. Be it physical retail or online, businesses which are lagging behind in embracing this new change will have a tough time surviving the proliferating demands of the market.

To sum up, technology and sustainability are the two key formulas of success for any fashion brand in the industry. Indian fashion brands will have to constantly reinvent themselves to evolve with the increasingly competitive retail landscape.

J. Suresh is an MBA from IIM Bangalore and an engineering graduate. He has over 30 years of experience in the FMCG, Lifestyle Brands & Retail industries.

As the CEO of Arvind Brands & Retail business, he has turned around the business into a profitable, high growth business. He has been with the company for the last 9 years.





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IFF'17 INAUGURAL SESSION BRINGING ALIVE THE FUTURE OF FASHION THROUGH INNOVATION, CONSUMER INSIGHTS AND RETAIL DIFFERENTIATION

BY GURBIR SINGH GULATI WITH RASHIKA GUPTA, PEARL ACADEMY



“The fashion market is more complex, sophisticated and segmented today. Segmenting the market, getting a clear sense of your identity and knowing your customer is very important.”

–Dilip Kapur
President, Hidesign

The most awaited inaugural panel discussion started with a discussion on the younger gen, which will be the emerging dominant consumer force of modern times and the newest target audience for many brands. This technologically equipped younger generation is well informed, well connected and is steadfast about its needs and requirements. This generation is also beginning to exert an influence in terms of what he/she buys and what others buy too. They are exposed to information and know what they want to see and read. BS Nagesh, Founder, TRRAIN, most skillfully led and moderated the discussion.

Bijou Kurien, Board Member, L Catterton Asia, was of the view that the, “Youth of India today are no less than international youth.” He further elaborated, “The Indian consumer today, similar to one in US and China, has an understanding of brands across the world and the latest trends. Fashion is no longer confined to few fashion capitals and is more democratic and widespread.”

Taking the discussion forward, Tushar Ved, President, Major Brands, said, “E-commerce is impacting everyone globally. Fashion is being discussed on Facebook, Youtube and various other channels. Indian customers, especially women have evolved in terms of fashion. They are not narrow minded anymore. They adore denims, t-shirts, bags, shoes, sunglasses much more as compared to women 10 years back.” Prashant Gupta, President & CEO, abof.com, who comes from an online background, stated that the consumer today is spoilt for choice. “A lot of global brands are available in retail as well as on digital platforms. With this, the



L to R - B S Nagesh, Suresh J, Prashant Gupta, Bijou Kurien, Dilip Kapur, Tushar Ved

consumer has a certain expectations from the brand, the range and the overall experience.” He further stated that the consumer is also bolder now in his choices.

FASHION AND THE IMPORTANCE OF SEGMENTATION

Market segmentation is the process of dividing consumers into different categories based on distinguishing characteristics. The impetus behind market segmentation is that it helps retailers identify customers who are most likely to buy their products.

Emphasizing on the importance of segmentation in the Indian fashion industry, Dilip Kapur, President, Hidesign, stated, “The fashion market is more complex, sophisticated and segmented today.” He further added, “Segmenting the market, getting a clear sense of your identity and knowing your customer is very important.”

Suresh J, Chairman IFF 2017, MD & CEO, Arvind Lifestyle Brands clearly identifies 2 sets of customers in India – pre independence and post independence consumers. He commented that behavior pattern of older consumer (45-50 years) is very similar to a teenager. He highlighted on one of the major problems faced by the fashion industry today where the brands have restricted their consumer base to people walking in the malls. He had an important takeaway for the brands to realize the need of the major

consumption happening in small towns where the consumers are becoming aspirational and are brand conscious.

THE RELEVANCE OF FAST FASHION

Fast fashion follows trends that change incredibly fast, often causing new styles and trends to become obsolete in a matter of weeks. Fast fashion is bought mostly by young consumers who have a deep desire to look stylish and appear on-trend. Is India really on the fast fashion runway?

With the advent of digital shopping platforms which is fueling the growth for fast fashion, Prashant Gupta, President & CEO, abof.com shared his own experience as he said, “These days use and throw fashion is happening in India. The fast orientation of changing fashion pushes the women of today not to invest in expensive attire which may occupy her wardrobe space and will limit her in following the latest in trend.” Keeping the current trend in mind, Tushar Ved, President, Major Brands emphasised on comfort as the prime factor in today’s fashionable world. He was clear as he declared, “Sexy is out, cool is in. Suitcases are out, backpacks are in. Black and brown shoes are out, sneakers are in.”

INDIA AS A PRICE SENSITIVE MARKET- THE WAY AHEAD

The Indian consumer is extremely value conscious and takes very well considered purchasing decisions. But with the inherent Indian contradiction of being equally concerned about the brand he or she is buying. There are emerging segments who are very brand focused and wants the latest

product launches. Volume business is going to occupy a major role. But there will be a room for the brands in the premium and the luxury segment. Tushar Ved, President, Major Brands shared that there is a growth in tier-II and -III cities for reasonable priced high-end products. He advises the brands to invest in such markets where the cost of retail operations are less considered to a metro and being where you are restricted to being in a mall.”

Looking at the market data matrix Bijou Kurien, Board Member, L Catterton Asia said, “The organized market is around USD 8 billion and in that USD 6 billion is the mid premium market where most of the brands are playing. There is a mass market which is around 1.5 billion but if you extend it to unorganized unbranded retail that will be 30 billion dollars where the real growth is going to happen.” This is a clear indicator that India is a price driven market.

Omni-channel is most appropriate channel for any fashion brand today. With e-commerce coming in, distribution is not an issue now and brands can reach out to a larger number of consumers in tier-II and tier-III cities.

Prashant Gupta, President & CEO, abof.com, informed, “Many consumers are doing dual shopping. Consumers are comfortable buying low priced merchandise through online channels compared to buying premium priced products. If they wish to buy premium products they head to physical stores where they can try and then buy.”





L to R: **Santosh Menezes**, Business Head, Images Group; **Suresh J**, MD & CEO, Arvind Lifestyle Brands; **Prashant Gupta**, President & CEO, abof.com - all about fashion; **Bijou Kurien**, Board Member, L Catterton Asia; **Dilip Kapur**, President, Hidesign; **Tushar Ved**, President, Major Brands; **BS Nagesh**, Founder, TRRAIN; **Rajan Varma**, Managing Editor, Images Group

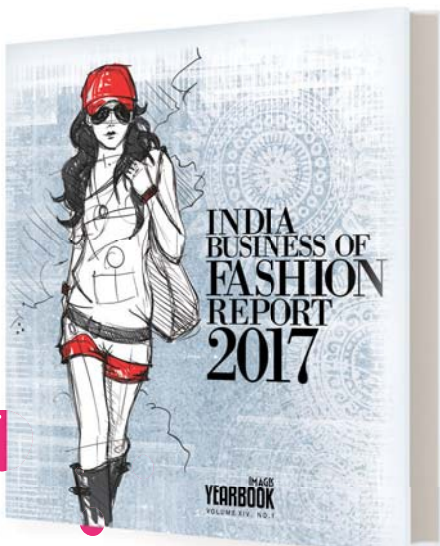
LAUNCH OF INDIA BUSINESS OF FASHION REPORT 2017 AT INDIA FASHION FORUM

The most awaited India Business of Fashion Report 2017 was launched at the India Fashion Forum 2017 at Renaissance Powai by a panel of eminent leaders of the Indian fashion industry. The panel included J Suresh, Chairman, IFF 2017 and MD & CEO, Arvind Lifestyle Brands; BS Nagesh, Founder, TRRAIN; Bijou Kurien, Board Member, L. Catterton Asia; Dilip Kapur, President, Hidesign; Prashant Gupta, President & CEO, Abof.com - all about fashion; Tushar Ved, President, Major Brands; Santosh Menezes, Vice President (Fashion) Images Group; and Rajan Varma, Managing Editor, Images Group, who led the making of the book.

According to the India Business of Fashion Report 2017, the Indian fashion apparel retail market which was worth Rs. 2,97,091 crores (INR 2.97 lakh crores or USD 46 billion) in 2016 will grow at a world leading CAGR of 9.7 percent to reach Rs. 7,48,398 crores (approx. INR 7.5 lakh crores or USD 115 billion) by 2026. The promising growth rate of 9.7 percent makes the Indian fashion industry very prominent in the retail sector. India has the world's largest youth population, which is becoming fashion conscious owing to mass media and social media penetration.

Encompassing exclusive studies conducted by IMAGES Fashion Research and key reports from top-running international consulting companies participating in the India Business of Fashion Report 2017 include IBM, PwC, E&Y, Nielsen, Kantar IMRB, Technopak Advisors, IIT Chennai, WGSN, The Woolmark Company, Trend Council, IDC, Knightfrank, Wazir Advisors, Vanitycask Inc., Le Souk, Pearl Academy and Restore Design, to name a few.

Indian economy, one of the fastest growing economies of the world, is witnessing major shifts in consumer preferences, with a GDP growth rate of 7 percent, India has an edge over developed markets of the US, Europe and Japan which are expected to grow at a rate of 2-3 percent. This has opened unprecedented fashion retail market opportunities. Increasing disposable income, brand awareness and increasing tech-savvy millennial population are the driving factors of corporatized retail within the country. Overall, the Indian retail scenario has shown sustainable long term growth compared to other developing economies.



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THE INTERNET OF THINGS AND VIRTUALIZATION OF RETAIL

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY

Unfolding the session, Manish Nadir, Retail Capability Lead, Accenture and one of the co-chair of the session, addressed the delegates about the changes that have been witnessed as technology advanced in giant steps in the last few years. “The fashion industry is going to move fast forward from now on,” he said. “This is the era of retail virtualization. Like Pulkit Trivedi of Facebook showed us today, smart phones are real and it has definitely been a disruptive phenomenon hitherto unseen by the Indian retail industry. Now, where we are heading to is towards living services, which is nothing but virtualization, and the time for the Internet of Things and Artificial Intelligence,” he added.

Expectations of today’s consumers are changing. To put it simply, the consumer itself is changing and players and businesses have lifted up their technological interventions to stay relevant to the consumer. “So to meet these liquid expectations, retailers will have to think of ways to bring physical to digital, which in Accenture, we call living services,” explained Sandeep Rai Sharma, Managing Director, Accenture and the second co-chair of the session.

“Living services are tailored around consumer preferences that are always changing. These services are not only highly customised to suit suit preferences, but are constantly evolving,





“We have seen unmatched technological advancements in the last 20 years, the world adapting to digital from physical, etc., but what we are going to experience over the next 5-10 years will dwarf what we have previously experienced.”

—Sandeep Rai Sharma
Managing Director, Accenture.

just like the human race. Living services are going to constantly evolve, learn and adapt to the changing needs, weather, intents, references, and they are going to be dynamic unlike age old static experiences. And they are going to be all pervasive, highly proximate in our lives, day in and day out. And that’s where things like wear-ables are going to impact our lives everyday,” he added.

Talking about the relevance of living services to contemporary retailers and fashion businesses, Sharma pointed out, “We have seen unmatched technological advancements in the last 20 years, the world adapting to digital from physical, etc., but what we are going to experience over the next 5-10 years will dwarf what we have previously experienced.” True! The growth of connected devices, Internet of Things, beacons, sensors, proximity devices, cloud computing, big data, etc., are set to give the fashion retail fraternity much more insights not just of consumer segments at a large level but also very personal insights about each and every single shopper. “AI (artificial intelligence) is the new UI (user interface). AI is going to play a big role in how we consume data and content on a day to day basis,” added Sandeep Rai Sharma.

Coming to the panelists, Manish Nadir asked Prashant Gupta, President & CEO, abof.com, about the new AI based personal fashion adviser that ABOF launched and the company’s strategy in utilising virtualisation to liquid consumer preferences.

In February 2017, ABOF launched AISHA (Artificial Intelligence driven Styling and Hotness Advisor), that will provide a chat function through which customers can get fashion advice on their fashion and wearing products requirements anytime and anywhere. Simply put, the new function will help

customers in choosing what clothes they would like to wear for specific occasions and get advice on how to create a look.

Elaborating on the new advisor, Prashant Gupta shared, “We figured that the frontier for a good fashion e-tailer is to be a fully tech enabled fashion adviser. This is how AISHA was born. It is a new idea which has not been proven yet, so we can’t actually tell its efficacy yet. But from the bit of response that we have seen yet, we have a road map for the next 12 months of what all features we will be amended to make it more personalised.” He also added that to give consumers an unparalleled shopping experience he envisages AISHA as a smart chatbot that not only helps consumers with their styling options but also with other queries related to stock, availability, order, etc. He hopes that about 4 years from now, AISHA will be the main entry point for a consumer into ABOF.

Next, Manish Nadir, asked Manoj Krishnan, Senior Vice President, Information Technology, Landmark Group about how consumer expectations and technology will come into play to ensure that brick and mortar do not lose to the virtual world.

The Landmark Group is, by DNA, a brick and mortar expert, but the group also launched an online channel a year back in India. As of now, the group is functioning in a multi-channel model but has plans to move towards a omnichannel model soon. “Because, our aim is to maximise conversion every time a consumer walks into our store, if a preferred product is not in the store the customer should be able to get it online from the store itself, conveniently,” said Manoj Krishnan. Apart from the brand Lifestyle, the group also has significant private labels which takes them closer to manufacturing, involving them in





an extended supply chain. For the group, the fate is decided even before the season actually starts. “We would leverage on AI for things that are more fundamental, and it would be definitely exciting to see how things pan out. But the actual challenge would be to feed this engine with content, in that we believe, the e-commerce players are more stronger than brick and mortar people like us,” Krishnan added.

Adding his views, Mridumesh Rai, Brand Director - Park Avenue, Raymond, said, “I think, the opportunity is how we leverage technology to make our stores more efficient and make it do more for the consumer than what the customer gets out of it. Personally, I will adopt any technology that gives me one of the three benefits. First, efficiency, with cost benefits. Second is convenience and the third is personalisation. Personalisation is one thing that technology can help achieve but is hard for the physical world.”

On asked about the digital strategy that Vajor.com employs to provide a much more immersive experience to the consumer, Chief Digital Strategist Ena Bansal said, “With more connected devices and Internet of Things coming into the picture, we not only have data, but also smarter data with tools to filter

it. Because of that, we can run relevant campaigns and engagements for consumers. So, the differentiating factor that remains for our brand is how we are trying to leverage that position and try to give that edge factor through good user experience. And user experience is the best content that we could give out. From different digital touch points, how can I reach out to my customer and give them a personal experience — that is the key.” Vajor also gives paramount importance to content marketing across channels and platforms and the company believes it will lead to its digital strength along with its products.

Expounding on the Indian consumer, Vandana Chaudhry, Head - Sales and Business Development, Crocs stated that India is a diverse nation with different needs and expectation and the one thing that binds everything together is the network. “The network could be either digital or social and one that transcends geographical and sociographical boundaries to bring like minded people together for brands to interact with them. From a digital perspective, our objective is simple, the consumer is at the heart of everything. So we try to effectively communicate, interact and build a long term relationship with the consumer. From a sales standpoint, we have a a lot of data in terms of historical preferences of customers, which give us

a good grasp of the locational, regional preferences and we use our data points to make our offerings more relevant to consumers across the country.” She added that personalisation is important to Crocs but from a perspective of making products available at the right touch points as opposed to really personalising the product.

Next, Sandeep Rai Sharma asked Karan Behal, Founder and CEO, PrettySecrets.com about evolution of the business and how he sees the company evolving 2-3 years down the line based on the way technology is impacting retail. As per Karan Behal, along with customer orientation and personalised experiences, an equal opportunity also lies in the backend of businesses; efficiencies that can be brought into the supply chain, operation efficiency through data analysis, etc.”The amount of efficiency that you can bring in at a store level also needs attention. For a multi-channel brand like ours, we think about things like price parity, overlapping customer segments, and try to chart out a strategy that can last for atleast 4-5 years,” he added.

On asked how data security will play in the omni-channel world, Behal said that as consumers get aware of the amount of data being collected, the privacy of the data will become a focal point. “Now we are all excited about Google’s Nearby, but we are not worried about how Google will monetise it and if customers will reject it. But that’s something that we should be looking at. While we are excited, we should also be cautious about it,” he added.

Manish Nadir, then asked Anuradha Madhusudan, Director Marketing, TARGET, how she sees the different channels and media mix when it comes to marketing in a country like India, where TARGET has no store presence as yet. Citing the earlier template



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“It’s a treadmill business, you keep running to stay at the same place. Every few months you have to come up with new ideas, new thoughts and new innovations as the market and consumer preference are moving very fast.”

—Prashant Gupta
President & CEO, abof.com



“But the actual challenge would be to feed th AI engine with content, that we believe, the e-commerce players are more stronger than brick and mortar people like us.”

—Manoj Krishnan
Senior Vice President, Information Technology,
Landmark Group

of retail, she explained, “Earlier, the retailer who sold a product had that power to influence the consumer, that’s where most value was sought. Today, everybody in the the value chain is competing to have a direct relationship with the consumer. E.g, somebody likes an iPhone, they went to TARGET and bought an iPhone, came home, liked Apple on Instagram and Facebook and they also liked TARGET on both these platforms. So, who owns the relation with the consumer today? Is it Facebook, Instagram, Apple or is it TARGET?”

On being asked about how TARGET’s US marketing is different from that in India, she cleared that the brand doesn’t differentiate. “We call it retail on demand. We don’t mind where the guest has seen it—on Pinterest, Instagram or on target.com or in a store. And that’s how we are trying to look at retail. So within the stores, what the extended aisle looks like is that we have part collections and part is digitized. We are now looking at how Augmented Reality can enhance an in store experience. But, the biggest challenge we face as retailers is that we do not understand the single view of the consumer. We have online data of the consumer and we have offline data of the consumer but how do we tally that data to know who the consumer is? So until and unless we get a single view and follow the consumer it is almost impossible for personalisation to be super effective. It’s a huge challenge,” she added.

Sandeep Rai Sharma then asked Ranjan Sharma, Head IT, Bestseller Retail about the marketing strategies of the brands under the Bestseller Retail umbrella - Jack & Jones, and Vero Moda. “How do you see, from a branding and marketing strategy, the difference between these two brands as well as how consumers interact with each one of them? Do you share the data of the respective consumers of both these brands” he asked.

Ranjan Sharma replied that since both the brands are owned by the same company, all the data is accessible to the company. But, the DNAs of both the brands are completely different and so are the look of the stores and the target audience. They might be overlaps but each of these brands have their own consumers. “But will there be overlaps between ONLY and Vero Moda customers? Yes, for sure, and we have seen it pretty often because at the end of the day it all depends the occasion that the consumer wants the apparel for,” Sharma added.

Talking about AI in stores, Ranjan Sharma pointed out that AI was present in the yesteryears too, albeit in the form of sales personnel. “These personnel tried to understand the requirements of the consumer and since we have repeated consumers, they knew a fair section of the consumers pretty well. But since retail is becoming progressively complex and challenging, you definitely need to leverage on AI to empower these personnel to do their work much better,” he added. According to him, it is not just technology that will create magic, there is an urgent need of educating and training the people in the stores too. “This is where the change management is becoming a bigger task,” he said.

On asked about the influence of Internet of Things in the supply chain in the future, Manoj Krishnan, explained that IoT can definitely help with overheads like energy and more specifically in passive RFID tags. According to him, it will be even more relevant for other retailers like jewellery.

Prashant Gupta concluded the session with the fact that ‘there’s no silver bullet’ in retail. “It’s a treadmill business, you keep running to stay at the same place. Every few months you have to come up with new ideas, new thoughts and new innovations as the market and consumer preference are moving very fast,” he concluded.





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JABONG



—Aqeel Ahmed,
MD, Florence Shoe



—C Devdas Nair,
Customer Care Associate & Head Supply Chain
& Mission Control, Shoppers Stop



—Darshana Srivastava,
Head of VM, Gap- Arvind Lifestyle Brands

CX (CUSTOMER EXPERIENCE) FORUM: ENHANCING SUPPLY CHAIN CAPABILITIES FOR A GREAT CUSTOMER EXPERIENCE

BY TANYA KRISHNA WITH PRATIKSHA JONDHALE, PEARL ACADEMY

While most retailers understand the importance of providing a consistently positive customer experience, many struggle with legacy systems that fail to address customer experience needs. To successfully serve omni-channel demand now and in the future, retailers must recognize and accept that changing market dynamics necessitates adjustments to the old ways of doing things. As customer behaviour is evolving in the omni-channel environment, getting the right fashion products to the right sales channels can be a highly complex process and supply chain proves and will prove to be crucial for this retail evolution. The session, co-chaired by Dhruv Agarwal, Chief Strategy Officer, GATI and Kundan Chauhan, Head- Supply Chain Operations, GATI, featured a set of luminaries from the industry talk about the importance of supply chains for customer experience.

“Supply chain is the big part of building and maintaining customer experience and loyalty for a brand. Over the last 2-3 years, CEOs and CFOs have started taking interest in trying to figure out ways to build very responsive supply chain for retailers and brands to keep a consistent customer experience throughout,” said Agarwal from GATI.

Speaking on the topic, Bangladesh’s footwear manufacturer and retailer, Apex Footwear’s MD, Syed Naseem Manzur said, “Coming from a factory background into retail, the experience on the supply chain is very interesting because I think the expectations are completely opposite. Factories traditionally, in our part of the world, have never been agile; it always has been about stable and predictable production. But if you are talking about customer centric productions, what we are realizing today is that you have to put your money where your mouth is. If you want your supply chain to be responsive, you need to be able to give the factory a production team forecast and future orders on material. Because, what slows down the factory is not the production time, it’s the lead time on the material.”

Furthermore, Aqeel Ahmed, MD, Florence Shoes, talked about the shoes industry and its potential in India. Florence Shoes, which has 65 percent of its business in the US, 25 percent in Europe and 10 percent in England, is launching a French shoe brand, Guy Laroche in India. He said, “India produces 1.2 billion pairs of shoes and the understanding that a majority of it is exported is a myth. On the contrary, only 10 percent of the shoes of the entire production of this country is being exported, as



–**Dhruv Agarwal**,
Chief Strategy Officer, GATI



–**Ishaan Sachdeva**,
Director, Alberto Toressi



–**Kunal Asar**,
Vice President- Offline Retail Strategy, Pretty
Secrets.com

compared to China, Vietnam, etc. One reason to launch Guy Laroche in India is that the country needs to have a product which is at par with the European and American brands.”

Emphasizing on the importance of supply chain and logistics, Darshana Srivastava, Head of VM, Gap Arvind Lifestyle Brands, said, “The logistics or the supply chain for visual merchandising plays a very important role. Because it is only when you send the products to the store that we walk on overall presentation of the products. If the sell-through is high, the challenge is really how you turn around the store into the best presentation possible. And for that, one obviously needs a really strong supply chain and logistics. Logistics and supply chain can help to ensure that we get that replenishment or the new flow of stocks on time before certain hours, so that we have enough time to put things up on floors to sell, which is the last means for any retail business.”

Apart from the product and price, supply chain is something that completes the triangle for any retail business, believes Ishaan Sachdeva,

Director, Alberto Toressi. He appraised, “One can have good product, or a good price, but if it’s not available where it should be and when, it doesn’t make a difference to a retailer.” Sachdeva also pointed at the flaws of the supply chain system in the country. He said, “The situation is such that a product reaches quicker from India to London than it reaches from Agra to Mumbai. Supply chain companies need to do a lot in this regard. One more part that government should consider is making it easier for the retailers and brands to send products everywhere.”

Rajesh Kadam, COO, Inc.5, talked about another crucial aspect of the supply chain – reverse logistics. He maintained, “After EOSS, brands or retailers like us have to go through much trouble. While we are ready with the merchandise back in the warehouse, the OTBs (open to buy) are not open to take in more products. We are ready to launch the Autumn/Winter collection, for instance, and it has to be picked and delivered to the LFS, which cannot be done unless the leftover products from earlier is not brought back. For this reason, reverse logistic is crucial when it comes to supply chain.”

Kunal Asar, Vice President- Offline Retail Strategy, PrettySecrets.com, said

that the brand which was only into online space for the last few years, has recently started building its distribution into offline marketplaces and has plans to open 30 more EBOs by the end of this year, apart from the two EBOs already launched recently. “Considering that we are looking at pan India expansion right now, making sure that inventory is at the right place at the right time is what will really define this expansion for us and supply chain is definitely going to be an integral part of the process,” he said.

C Devdas Nair, Customer Care Associate & Head Supply Chain & Mission control, Shoppers Stop, said that customer experience is the top priority of the retail giant and this is evident by the fact that every designation at Shoppers Stop starts with ‘customer associate’. “For us, supply chain has to start with customers and end with customers. We have four regional distribution centres and we outsource 100 percent of our logistic set up and have early morning delivery stores stalled in the country. Before the first customer walks in at 11:00 in the morning, we display all the stocks, remove all the curtains and stand ready to welcome the customer.”



—Mahesh Khetan,
AVP- SCM, Aditya Birla Fashion & Retail

Nair boasted about Shoppers Stop's strong relations and communication with its partners, and also about its replenishment systems, auto allocation from distribution centres, etc., so that there is no scenario where a stock is present in the distribution centre and not in the store. "Shoppers Stop is in the process of becoming omni-channel within a year and has implemented one of the best automated warehouse management systems in the world for all the distribution centres. We have implemented an auto management system and are doing everything from technology front or supply chain front, in order to become an omni-channel retailer.



—Ojas Nishar,
Director, Vitamins

Ojas Nishar, Director, Vitamins, said, "Kidswear is a category where there are a number of sizes and there are particular size requirement from store to store, from location to location and in order to replenish those sizes on time is a big challenge for us and supply chain plays a critical role there. Besides, reverse logistics is also one of our main concerns."



—Praney Malhotra,
Head- Supply Chain, Arvind Lifestyle Brands

Furthermore, Simi Cecil, Head-Merchandise Planning & India Sourcing, Celio Future Fashion, talked about the importance of supply chain and availability of product in the store for better customer service. She said, "In order to handle this challenge, we have a three way approach. Firstly, we have to measure availability. Secondly, we have gone to the level of blocking fabrics for our best selling products. This really has impacted the brand's sales. We focused on replenishments. We made it weekly because we operate with a lot of doors. We ensure that we have adequate back up of the bestselling products with the partner warehouse as well. Thirdly, implementation efficiency is important because traditionally, more inventory in

the store results in more sale. However, we believed that optimal inventory be maintained, and unless the best selling or the working stock in the warehouse is not ready to be pumped in to the store, no robust system will work for the businesses."

Continuing further, Srikanth R, Head-Innerwear & Accessories, Supply Chain, Raymond, said, "Four years back, Raymond had a supply chain which was more reactive than pro-active, and thus the company put up a planning team which constituted of demand and supply planners and connected that to the CRM. Raymond constitutes other brands like Park Avenue, Parx and ColorPlus which cater to many channels, starting from retail, trade, LFS, online space, etc. We work on two sides of the supply chain — one is a pull model and other is push model. But one of the things that we realized four years back was that both these models have three things to be taken care of, that is, cost, speed and flexibility." In order to address these issues, the company called for data and moved to a prescriptive model of analytics. The company has connected each of their sales executive with a tab to monitor what orders they are taking and that the order is connected back to the distributor to replenish. The distributor inventories map back to the distribution centres, so that the goods are quickly

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—Syed Naseem Manzur,
MD, Apex Footwear

LIFESTYLE STORES RECOGNIZED AS 'IMAGES MOST ADMIRED FASHION RETAILER OF THE YEAR: PAN-INDIA PERFORMANCE'



Lifestyle, part of the Dubai-based retail and hospitality conglomerate, Landmark Group, was awarded the 'Images Most Admired Fashion Retailer of the Year: Pan-India Performance' at the Images Fashion Awards 2017, an annual event to recognize and honour fashion retail excellence in India.

The award was accorded to Lifestyle for its consistent growth momentum in the country enabled by their exceptional product portfolio, superior customer service and world-class shopping experience. Lifestyle, over the years, has differentiated itself as a fashion retailer by becoming one of the most preferred fashion destinations, an employer of choice, and a reliable and favored business partner.

Speaking about the award, Mr. Kabir Lumba, Managing Director, Lifestyle International Pvt. Ltd, said, "It is an honour to be recognized for

our performance as a fashion retailer. It is our endeavor to offer our customers on-trend fashionable products and a great shopping experience, while constantly improving efficiency in our processes."



Lifestyle is India's most preferred fashion destination for latest trends. Lifestyle brings multiple concepts including men, women, kids apparel, Footwear, Handbags, fashion accessories and beauty under the convenience of a single roof in each of its store.

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YOUR STYLE. YOUR STORE.



—Rajesh Kadam,
COO, Inc.5



—Simi Cecil,
Head- Merchandise Planning & India Sourcing,
Celio Future Fashion



—Srikanth R,
Head- Innerwear & Accessories, Supply Chain,
Raymond

sent out. Srikanth R maintained that the vendor management inventory has enabled the company to be able to see across the supply chain and the vendor is also able to see the demand and react to that.

Mahesh Khetan, AVP- SCM, Aditya Birla Fashion & Retail, said, “In the last 2-3 years, customers’ expectations have evolved into a very complex environment. Now, the consumer wants to buy in one store, in one city and wishes to return that product in a store of the same brand in some other city. They want to buy online, return either from their house or to the store, or buy online and pick at the store, and so on. This has created tremendous complexities for the retail supply chain. Supply chain challenges are multi fold in this environment. One is inventory management, second is demand forecast accuracy, third is order fulfillment and fourth is the returns management. To foray and to survive and to perform in this omni-channel world, traditional supply chain requires complete overhauling right from manufacturing to logistics, transportation to how the warehouses manage and to how the organizational structure of the organization works. Demand forecast tools have to be more intelligent than what they used to be in the past. But again, when we talk about end to end supply chain, it has to begin from the manufacturers.”

Talking about returns management, Khetan said, “Return is reality in the retail business, in brick and mortar environment and more so in e-commerce environment where the return percentage is much higher. Managing and approving returns, deploying the stocks back to the main inventory is still a challenge and modification in the organization structure and intelligent IT systems, etc, can address these challenges.”

Arvind Lifestyle Brands, one of India’s largest brand house, have a 100 percent outsourcing model where the company do not own any manufacturing facility but outsource them. Pranay Malhotra, Head- Supply Chain, Arvind Lifestyle Brands, said, “While consumers want new fashion in best quality every 2-3 months, retailers want the best returns on their investment, that is, more sale on full price rather than in EOSS. The core lies in vendor management and the quality management in our company. What we are doing and we have done is to automate the core and essentials category, and curate and invest more on the fashion. It means developing the capabilities with the suppliers on how can we move from the two seasons to four seasons in one year. Every three months, we can bring in new fashion in the market by reducing the team lead time right from the fabrics stage to manufacturing stage to delivering it to the warehouse. Once we reduce it, we will have the fashion being delivered right in time to our company.”

And finally, Nair from Shoppers Stop talked about the initiatives and measures taken up by the company. He said, “We have launched a program called ‘personal shopper’ where customer can actually take appointment, block the slot, can come to the store and an expert will accompany them till he/she completes the entire purchase. This program garnered a very good response and now we want to implement this across all our stores. We have also installed the ‘magic mirror’ in few of our stores and this too got great response from the customers. For e-commerce, we are also planning to use store inventory. We want to shift from the store so that we can cover the larger pin codes and more cities; that’s what we want to do for better customer experience. These are the few new initiatives we have recently taken to improve the customer experience.”





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BUILDING A TRULY SYNERGISTIC & POWERFUL OMNICHANNEL STRATEGY

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY



“Actually, it has been the buzzword for quite sometime now, probably 4-5 years, but do we actually know what omni-channel is?”

–Vinay Bhatia
CEO - Loyalty & Analytics, Future Group



“You might come to our website, select a product but do the purchasing from the store. How do I track that sale, I do not have that mechanism?”

–Anil Shankar
CCA & VP - IT, Shoppers Stop

Technological advancements in the recent decade have helped the fashion industry, and the retail industry as a whole to transcend the boundaries of physical stores. Today, the fashion retail ecosystem is teeming with a slew of channels including, e-tailing, mobile retailing, home shopping, etc. But as the focus on customer experience increases, omni-channel has become the new buzzword of the retail industry. “Actually, it has been the buzzword for quite sometime now, probably 4-5 years, but do we actually know what omni-channel is?” said the moderator of the session Vinay Bhatia, CEO - Loyalty & Analytics, Future Group, kick-starting the session that focused on building a dual competitive edge in the digital era.

Continuing his introduction of omni-channel, Bhatia expressed that we have experienced this channel in India even before it became a buzzword in retail. Often defined as click and pick or BOPIS (buy online, purchase in store), he set an analogy of the neighbourhood kirana stores, where similar to the modus operandi of omni-channel, consumers used to just call the store and pick up or have their requirements delivered. In order to know, if omni-channel has come of age, Vinay Bhatia asked the audience for their views. “As the volume of business grows, what are the challenges that might arise for an omni-channel set up?” someone asked Anand Aiyer, Senior Vice President and Business Head - EasyBuy (Max Retail). Accentuating that the retail scenario is registering tremendous changes in the recent past, he shared that it is indispensable for a retail set up to leverage technology and stay updated and relevant. “Today, people no longer ‘go online’, they ‘live online’. Technology is advancing rapidly and we have to adapt to it. Coming to the challenges part, I personally think, it can be divided into three major parts. First, it is very important to make a cultural shift in the organisation to be successful in an omni-channel framework,” he shared. He continued that Max, a predominantly brick and mortar company, is now on the verge of launching their omni-channel set-up, but before that they have started implementing exercises for the afore mentioned cultural shift. The project, called Orbit Shift, focused on building an omni-channel experience and aligning the entire organization, from the top management to the sales team, to it.

“We, at Max, launch close to 2,000 styles every two months. So there’s lot of inventory visibility required and we have to ensure that we deliver the inventory, which makes up the second part of the challenge.” In line with the this, Max is investing significantly on supply chain, moving to a larger automated warehouse and creating the required infrastructure. “Only after this is in place we can come to the third instalment, the launch of endless aisles, which actually will ensure that a consumer can indulge in the luxury of an omni-channel set-up.”



L- R: Anand Aiyer, Alexander Köth and Mridumesh Rai.

“E-commerce, as an industry is good in data analysis and we can learn that from them. Similarly, there are a lot of things that e-commerce has to learn from brick and mortar.”

—Alexander Köth

MD & Founder, Minodes GmbH (Germany)

“First, it is very important to make a cultural shift in the organisation to be successful in a omni-channel framework.”

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Sr VP and Business Head - Easybuy (Max Retail), Lifestyle International

“I believe, the question is not about if we need omni-channel. Rather, it's more about when we need it.”

—Mridumesh Rai

Brand Director - Park Avenue, Raymond

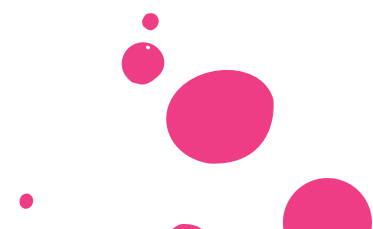
Sharing a basic view on omni-channel, Shivanandan Pare, Head - New Digital Businesses, Aditya Birla Fashion and Retail, said, “Single view of the inventory, single view of the consumer plus catering to the consumer need of buying from anywhere and everywhere — that’s omni-channel for me. It is a need for retailers primarily because the existing brick and mortar retailers are unfortunately losing touch/connect with the consumers, which earlier, they were repository of, before the advent of e-commerce. Naturally, their ability to customise and personalise for each consumer is getting lost.” Every organisation has realised the importance of this and they are taking steps. But, according to Pare, achievement still remains a implausible ambition specifically because the existing technology framework and large system integrators need severe overhaul.

Also, citing how Jio has boosted the internet penetration in the country, Pare explained how, in the last 6 months, after the launch of Jio, the entire

nation witnessed a secular growth of 36 percent traffic. Even after it became a paid service, no dip in the traffic has been witnessed. “The beauty of this, is that most of the traffic has been registered from tier-III and -IV cities, which we physical retailers are yet to penetrate,” he added. This reinforces the fact that this populace is at par with their urban peers in terms of aspiration and awareness about fashion. The consumption power of this populace can also no longer be underestimated.

Large retail groups like Lifestyle, Landmark, Shoppers Stop, Future, etc., have invested significantly on omni-channel. Still, most of these companies are yet yet to achieve the desired percentage of growth. On asked to elaborate on this, Anil Shankar, CCA & VP - IT, Shoppers Stop concurred Anand Aiyer’s thought that technology upgradation is just one part of the challenge, with the real task being

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“The endless aisle concept helps reduce the lost sales by a staggering 75 percent. There are also other technologies that can help gasp the preference of his customers, which ultimately will help him in customizing.”

–Swarndeep Singh
MD, LOGIC ERP Solutions



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–Shivanandan Pare
Head - New Digital Businesses, Aditya Birla
Fashion and Retail

the process and the changes required inside the organisation. “But there are lot of experimentation and initiatives that we are involving ourselves in and until and unless we try out ourselves, we never know what will work and what not. Personally, I believe convenience and an unparalleled experience to the customer is what matters the most,” he added.

Continuing on the challenges faced by omni-channel in India, Mridumesh Rai, Brand Director - Park Avenue, Raymond, said, “I believe, the question is not about if we need it. Rather, it’s more about when we need it. For brick and mortar retailers, it’s actually an opportunity and I believe, physical retailers have the ability to move to an omni-channel retail set up much easily than an e-tailer. For the physical retail fraternity, I think it’s a necessity because it adds value to both the supply and the demand side. On the demand side, such a set up will efficiently bring down issues related to size and stock availability, returns, etc., while on the demand side it will help retailers to sweat their primary assets like stock and store in a more efficient way. Omni-channel will also allow brands to reach to remote geographies where customer do exist but not in enough numbers to put up a store.”

In India omni-channel might be in a nascent stage, but globally, there are countries where it has caught on already. On being asked about his take on it, Alexander Köth, Managing Director & Founder, Minodes GmbH (Germany), said that he feels in India, 100 percent of the sales are omni-channel, considering everybody is mobile, everybody is also offline and everybody is also online at the same time. “So having a brand without an

online presence is very tough. As a consumer we also like to check out the brand’s website and check out what is on, so everything is omni-channel related. Maybe the revenue, which is the final and the decisive step, is not done omni-channel yet, but at least all the different channels are toughed. So, I am also with Mridumesh Rai on the fact that it’s not if but when,” he shared.

Coming to Vikas Bagga, Strategic Consultant, Stylus Concepts (HK), Vinay Bhatia, asked, “In the US, Amazon, which is an online player, is the largest retailer. Why do you think that these online players aren’t moving offline or approach the omni-channel route?” Bagga, expressed that, not only Amazon but almost all the major e-commerce giants are giving seamless services to consumers online. Also, the apps today are very well loaded and there no possibility that a consumer will be bereaved of any information that they need to look up. Even size wise, e-commerce players have descriptive size charts that tell consumers about European, American and Indian sizes along with measurements. In the app world most fashion e-tail apps even have style guides diluting the typical touch and feel phenomenon. “Having said so, I think most of the portals, and the consumers too, are getting inclined towards an omni-channel approach with touch and feel, seamless buying, exchanging, returning, etc. So, the thing is that, all these changes are real and they are happening and retailers must adopt to it,” he added.

Swarndeep Singh, MD, LOGIC ERP Solutions, explained how technology has been an enabler in the omni-channel set up. “The endless aisle concept helps reduce the lost sales by a staggering 75 percent. Moreover, a lot of things can be done in retail stores

like digital signages, that not only lets a consumer seamlessly browse through products but also helps the retailer to grasp the preference of his customers, which ultimately will help him in customizing.

Answering a query from the audience about sales of omni-channel not picking up yet, Shivanandan Pare shared that in India, about 99.9 percent of the business for any organisation comes from the traditional approach, which is to attract consumers to the store. But omni-channel urges a shift of mindset, and requires retailers to go to the consumer. "That's where the one view of consumer, one view of inventory and one view of the billing system thing is rooted in. Unfortunately, we are yet to go deep into that, and in the larger organisations, the cultural shift has not yet happened. The new age retailers are more adept in this and they know that they will have to be where the consumer is. This is the reason why Macy's market cap has gone down from USD 24 billion to 7 billion dollars in the last 7 years while Amazon's has only scaled up," he added.

Mridumesh Rai continued the discussion by saying that organisations never change out of their own will; it's the consumer who changes them. There is a lag in the pace that retail has progressed in the developed countries as compared to India. "But we have a habit of leap frogging. E.g, the difference of years between the first mall in the USA and India would be 70 years but it came down to 10 in terms of the first e-commerce portal and it will be shorter for omni-channel. Also, we will have to consider that the industry is not at a very stable state so as to allow an idea to grow," he added. According to him, Indian consumers are not yet addicted to the real USP of e-commerce which is convenience; what they are hooked to



"Apps today are very loaded and there no possibility that a consumer will be bereaved of any information that they need to look up."

-Vikas Bagga

Strategic Consultant, Stylus Concepts (HK)

is the discounts that the portals offer. Once the market stabilises and the consumer opts for e-commerce for the convenience rather than discounts, the real hour of omni-channel will start.

Anil Shanker added that when we talk about omni channel sales, what we actually are tracking is online sales. Today, tracking for omni-channel is still being not done. "E.g, you might come to our website, select a product but do the purchasing from the store. How do I track that sale, I do not have that mechanism?"

Responding to another audience query about the fate of e-commerce, Shivanandan Pare added that e-commerce is here to stay and it is a gift for consumers. "The internet either creates genuine value by consumer shift or it destroys value where it feels when it feels it is a burden on consumers. Lets, look at the classic example of the Encyclopedia that was a USD 600-700 million business, but today it is zero from a revenue point of view because Wikipedia has taken over. Intermittently, when Encyclopedia was getting destroyed, Microsoft entered and latched on to the value by releasing

a CD rom, diminishing the USD 700 million business into a USD 350 million market. Then Wikipedia came and Microsoft had to shut the business in the late 90s," he added. E-tail might have destroyed the book retailing market but it was the biggest gift for authors and consumers. In smart phones, consumer durables or in every category for that matter of fact, the possibility of launching multiple brands in a year has been made possible only because of e-commerce. So, according to Pare, e-commerce successfully weeded out all the inefficiency, which was inherent in the way retailing was done. "The reality of the world," Pare continued, "is that each market will have only one horizontal player. That's the reality of the internet because it works on network effect. And this is one reality that we as retailers fail to understand."

Vikas Bagga, chipped in and stated that even though there's plenty of analytics and data, it's too early to predict the future with precision. "Look at the challenges today, they need to safeguard their gross rupee margin, they need to look into the valuation part of it, what their overseas investors are thinking, etc. There's so much, but I think the channel is here to stay and the brands, consumers, and the entire ecosystem believes that we need to live with the best practices," he added.

Alexander Köth expressing his views shared that the core of all businesses is the consumer so it is extremely important to adapt to the needs of the consumer. Also, it would be wise to learn from other industries. "E-commerce, as an industry is good in data analysis and we can learn that from them. Similarly, there are a lot of things that e-commerce has to learn from brick and mortar. And in the end, it's the consumer who is going to decide," he said concluding the session.



KNOWLEDGE SERIES: BRAND VALUATION AND VALUE CREATION

BY TANYA KRISHNA WITH PRATIKSHA JONDHALE, PEARL ACADEMY



—Ajimon Francis,
Managing Director (India), Brand Finance

The knowledge series session on Brand Valuation and Value Creation was targeted at those who have always felt that their brands have started gaining respect in the peer group, with value chain partners and potential investors. The session pondered upon key points like, how does one calculate something as altruistic as reputation and respect; how does one thwart excel sheet — number crunching finance heads from buying them out cheap; and most importantly on how some iconic brands of yesteryears continue to hold ground till date.

Ajimon Francis, Managing Director (India), Brand Finance, kicked off the session trying to throw some light on the above mentioned points. Brand Finance was founded in 1996. Headquartered in London, the company is operating in India since 2005 and is a specialist in the area of brand valuation. Firstly, Francis got down to the basics of what ‘brand value’ actually is. “Brand value is not the money that you get for endorsements, it is not your profits, it is not your turnover. The topic is extremely important for the fashion industry.”



—Dr.R. Natarajan,
CRM & PR, Nall

There are a lot of people patting on your back and lot of people saying that the collection is fantastic. But at the bottom line, when you look at your P&L the numbers don't reflect. Why? The fashion shows are packed, the collection gets great reviews but sales are always below expectation. Another big dilemma in the minds of today's entities is to whether to manufacture themselves or to outsource? CFOs of companies are forever struggling with the bankers to get more money for the working capital. You want more fabric, you want more artisans with you, you want more equipment, but the money just doesn't come. So, the question here is: what is this reputation worth?

Francis cited some examples of how some legendary brands were created. He said, “Alexander McQueen was a fashion designer. Way back in 1995, he created the collection called ‘Highland Rape’ and the style was called ‘Bumsters’. It generated an entire generation of low waist trousers. In 2000, Gucci acquired 51 percent of his company and they appointed McQueen as the creative director. The brand expansion included opening stores in London, Milan and New York and the launch of a perfume brand called ‘Kingdom’ and then another brand called ‘My Queen’. In 2005, he collaborated with Puma to create a special line of trainers; then he launched as ‘McQ’ which targeted the younger, trendier crowd and was in a much economic price range than ‘McQueen’. Later, he collaborated with mass market retailer Target to create Alexander McQueen for Target, a specific line for the retailer. He then entered into luggage and worked with Samsonite to create an entire range of McQueen for Samsonite. On the afternoon of 11 February 2010, McQueen committed suicide. And just days after his death, on 18 February 2010, the president and chief executive of Gucci Group said that the Alexander McQueen's



—HS Sindhu,
CEO, Mufti



—Mohit Gill,
MD, Phiverivers



—Nathasha Kumar,
Founder & CEO, Vajor.com

brand has a life which is beyond the person himself and announced that the brand would carry on without its creative director and founder.”

Francis continued, “In the last many years that we have worked in India, one of the biggest worries in the minds of these beautiful creators is that “After me, what? I am the brand.” And they believe that once they are dead, their brand is gone. My point is simple, that the brands have a life of their own. We need to recognize what a particular brand stands for. As an owner, I invite all of you to think what your brand can do. You need to examine how you can keep a brand alive. A brand that continues to re-invent itself will last forever and continue to add value to its owners.”

HOW BRANDS DRIVE BUSINESS VALUE?

Francis delved deep into making the audience understand the meaning of brand value and what it stands for. He said that it is not about today's loss, profits or revenues, it is not about how many stores or contacts one has today. The point to think about is, how robust is the engines for the long run. If it is robust, it will grow and when it grows, it will make money in the long run. That is brand value. Brand value is very often spoken in terms of intangibles. While tangibles are shop, machinery,

bank balance, etc., which one can touch and feel, intangible assets comprise of respect, reputation, etc. Intangible assets make up for over half of the world's global enterprise value. “Within this intangible, there is something called goodwill, artistic intangibles, marketing intangibles, customer intangibles, contract intangibles and technology intangibles. All of these create brand value,” he summarized.

He elaborated on three concepts:

1. Brand Value is the proportion of brand contribution which can be legally transferred via sale or licensing;
2. Brand Contribution is the total economic benefit derived by a business from its brand;
3. Branded Business is value of a single branded business operating under the subject brand/trademark.

Talking about what works to add value to a brand, Francis said, “Brands don't stand on advertising, brands stand on stances like not giving up on its designers or suppliers as they are an integral part of the brand and not compromising on its aesthetics. Brand equity means that it should mean something to the employees, to the government and also to the financing world. Advertising is the easiest way to burn up money. And the safest way to grow your brand is to just focus on quality and consistency.”

LICENSING RATES

Tiffany & Co., gets 5 percent revenue just for giving their name, but what they ensure is that these watches go through their quality parameters, and Christian Dior charge between 3-6 percent and these are globally accepted and tax authorities cannot question it.

Someone from the audience asked, “Why is there so much emphasis on brand value and not on business value? How can one separate the two? And if it can't be separated, then why call it brand value?” HS Sindhu, CEO, Mufti, said, “As far as quantum of value is concerned, howsoever we evaluate it, the point is you must have an indicator that tells you whether your brand value is going up or not. The absolute value is not that important except when you are making a transaction. Now, when you say that the brand value exists only as long as there is business, there are some cases where it does exist afterwards as well. Sindhu gave the example of Dunlopillo, who still receive requests in their office asking about the availability of their mattresses, even after the company stopped its operations long ago. “So, there are residual values provided the brand did not go down for the wrong reasons. The value does go down tremendously because brand value is not just a theoretical thing which will fade anyway, it is also the

total deliverability of that brand. The difference we are making here is that you are right in saying it's a business but business may or may not make a profit, but for a brand to have a value, it must exist as a deliverable experience, as a deliverable product," he appraised.

Adding further to the topic, Vandana Chaudhry, Head- Sales and Business Development, Crocs, said, "Brand value is also a function of the future potential of the business. One data point is the current revenue, but also the potential of where the brand can go and what value it can contribute both to consumers and to the owners. That is really one data point that one could look at."

At this point, Francis summarized, "The difference between business value and brand value is that the business value actually encompasses everything. A business may have many brands and it may have unbranded revenues as well. So there are a lot of trading opportunities that you get. You get revenues as interests of your deposits and there are other earnings which come. All of that gets captured in business value. Brand value is specifically what that brand is standing for. Brand value's fundamental principle is that the brand will live. In case there is a disaster which happens, like a regulatory disaster or macro economic disaster, then obviously the value diminishes dramatically and all that remains is the residual feelings with that brand."

R. Natarajan, CRM & PR, Nalli, further added, "One should not dilute the original brand, but should do new ventures separately. This has happened to many business cases. They have been successful in their own sector, but when their co-brand uses the same brand they are not successful. So, failure of not connecting with the nuances of the new business is because of the baggage of original brand values."



—Vandana Chaudhry,
Head- Sales and Business Development, Crocs

Another member of the audience questioned, "What is the mantra or what are some of the steps to monetize a brand? Category extensions may be one way ensuring that the brand pulls in more money. What are the others?"

Sindhu from Mufti took this question too and said, "The creator of Mufti is very clear that he cannot be the soul of the brand forever. It's a young people's fashion brand and at the age of 80, will he still be relevant as a designer for the young people, is not that easy to accept. So, we have gone in institutionalizing the whole process. We had design consultants come in first of all, we have codified what our brand stands for and we are in the process of deciding that this is the range in which it has to be. Incidentally, we are a brand which stands for new fashion every season. But that means that there is a renovation, I have to re-invent the brand and at the same time, I must keep the discipline which leaves the brand values intact. So that part is being institutionalized. As you asked, how to encash it? It is your choice when do you want to encash the brand extension? If you vision for your brand to carry on going up and then if you get cluttered up with some other brand extensions that you have done today, that is going to shackle you. The future is what you have to predict and decide and that is the day when you have to decide when to go in for the brand extensions.

Adding to this, Mohit Gill, MD, Phiverivers, said, "For small brands like us, if you take brand valuation to the bank, they call it loss. The only place where the so called brand valuation works is with the customers; they make your brand as well as they break your brand. The problem is that the companies like us face hard times getting inside multi-brand stores, unlike in foreign nations where multi brand outlets are willing to experiment and are willing to give you that space. They have an area only for new brands and they cycle you around for around 6-7 months to see what kind of customer experience develops around your brand. For us, to get in to a branding story and a physical scenario was so much easier outside of India than here." Francis corrected Gill and said that customers love a brand for their consistency and discipline. "It all comes with pain, like for Liliput who struggled for a long period of time. There will be bankers who will throw you out, or MBOs who will only demand for their rents and not care about your brand values, but the ultimate solution to all these is consistency."

Nathasha Kumar, Founder & CEO, Vajor.com, gave an example from her experience. She said, "Vajor has a distinctive way of styling and the company is very particular about showcasing the right styling, the right colours, right background and models for its products. There was a marketplace which wanted our products on their websites with white background. However, Vajor refrained from doing so and we challenged them to try out 10 products shot on a white background. The idea didn't work out. Next, we put up our styling on their website and the sale automatically boosted. The idea here is that its not about whether you are small or new to the market or not, stand true to yourself. If you are stubborn about your idea, you have to challenge the people and you have to stick to your idea and that's how I think the brand value is built."





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KNOWLEDGE SERIES: FASHION IN THE ERA OF CONNECTED USERS

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY



Pulkit Trivedi, Director Industry verticals (India), Facebook, kicked off the first session of the India Fashion Forum 2017 with an exhaustive discussion on the new connected modern consumer. Emphasizing on the boom of smartphones and the subsequent increased penetration of mobile internet, he said, “Today, there are more smart phones than tooth brushes in the world, there are more mobile phones than toilets around the world. Mobile can even be seen in remote parts of Africa that are yet to see electricity connections.”

Smart phones have literally taken over the world. The mobile internet traffic, both globally and in India, is three times that of desktop traffic. Especially in India, the smart phone phenomenon is huge and by 2020, the nation will witness the highest growth of digital shoppers globally, even outshining mature markets like the US, UK and Canada. Smart phone penetration can also be easily considered as the chief architect of the rapid evolution of the modern Indian. Trivedi’s session revolved around the most prominent trends witnessed with the emergence of mobile internet and how it has successfully influenced consumer buying behaviour. He chalked out the following three facets on how brands should engage with this new mobile consumer:

- **Consumers are evolving**
- **Fashion is at the forefront**
- **Lines are blurring between online and offline retail**

CONSUMERS ARE EVOLVING

The last 10 years in India have been utterly disruptive and it is a blatant fact that the consumer is evolving fast. “By 2020, 70 percent of all internet users will buy online. So we have about 65-70 million shoppers who have bought a product online, and we will see this population increasing to 175-200 million shoppers by 2020. Thanks to the internet being more pervasive, connectivity improving, and the adoption of smart phones,” said Trivedi. According to a research that Facebook conducted with BCG, India is at the forefront of the mobile led digital growth, with the country leading the way in mobile purchases, far ahead of mature and emerging markets like Australia, Singapore, China and Japan. The report also suggests India’s contribution of m-commerce, as a percentage of B2C commerce is going to be at 42 percent versus a global average of 34 percent.

“If you go through any research on smart phone usage in India, people spend about 3-4 hours every day on mobiles. And largely, this consumption is driven by mobile apps. The difference is that app driven consumption is more discovery driven than intent driven, which means that people are in search of content that is relevant to and tailor made for them,” he said.

In India, Facebook has about 184 million monthly active users, of which about 100 million are active daily users who spent considerable time on the platform. What’s interesting is that, of this, about 95 percent access it from

their smart phones! Also nine out of ten e-commerce users have access to Facebook, which implies that Facebook is at the forefront of this revolution and has a lot to offer to brands and businesses. “You are likely to find your next potential customer on Facebook. Also, about 79 percent of online purchases by facebook users were on mobile. This, again, reaffirms how smart phones have changed the consumer and their buying habits,” said Trivedi.

FASHION AT THE FOREFRONT

Fashion is at the forefront of the digital revolution that has swept India. The category is the entry point of online purchases in India; about one third online buyers choose a fashion product as their first purchase. While this indicates that mobile access in tier -I and -III cities has gone up it might also be indicative of unavailability of brands in these regions. About 53 percent users on Facebook have shown a dominant inclination towards fashion. Also, Instagram has been growing rapidly in India and we expect the numbers of users to almost double by the end of next year. Instagram users, comparatively young, are very engaged on the platform. “What we see on the platform is that 56 percent of users say they are interested in fashion, and more importantly, about half of them said that they purchase the brands that they follow on Instagram. This clearly unveils the strength of the platform and the opportunity it harbours for brands. So, if you are a brand manager, it is indispensable to start thinking about



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mobiles and ways to engage with this new millennial consumer," he said.

LINES ARE BLURRING BETWEEN ONLINE AND OFFLINE RETAIL

"Just like the country's retail scenario witnessed a massive change in the 90's, we now are standing at the cusp of the mobile first shopping experience. This is more pronounced if you move beyond the metro cities of India. In tier-II and tier-III cities, consumers experience on the internet including online buying is driven chiefly by the mobile. And as omni-channel picks up pace, the lines between online and offline will be blurred," Trivedi added.

Mobiles, in the future, are projected to continue impacting both online and offline. Today, the offline world of retail is not bereft of the digital footprint. Trivedi added, "Our research with BCG revealed that digital is going to influence about 30 billion of fashion retail in India in 2010. So, there will be some point of digital footprint that will influence even offline retail. By the next year, 92 percent of consumers will use smart phones to do product research; about 87 percent will use smart phones to complement instore activity (web rooming) and 88 percent will use a mobile device to make purchases. So basically, it is high time that even the offline retail sector wakes up to the fact that mobile internet is real and it has a very strategic and meaningful impact on consumers' purchase decisions," he said.

Mobile influence will continue to impact online and offline sales since mobile internet has a major impact on purchase decisions. Shopping now is discovery led since people try to keep up with trends followed by celebrities, fashion bloggers, friends and family. Nine out of ten users who seek information on Facebook are likely to purchase a product. Trivedi then went on to discuss what these changing consumers' mindset meant to a brand. Platforms

like Facebook and Instagram help consumers discover content like never before and it is crucial for brands to understand the associated details so as to benefit to the fullest.

It has to be kept in mind that the busy generation today only expects to discover content that is relevant to them. So it becomes crucial for brands to develop a mindset to come up with meaningful and tailor-made content for their respective consumers and how to make it discoverable. "So if you really see, personalisation is not only a vital aspect but it will become mandatory. Brands must succeed in tapping into the news feed of their consumers with meaningful, impactful, personalised

"What we see on the platform is that 56 percent of users say that they are interested in fashion, and more importantly, about half of them said that they purchase the brands that they follow on Instagram."

—Pulkit Trivedi

Director Industry verticals (India),
Facebook



and aesthetically appealing content to engage with their consumers," he said.

Sharing insights on trending content Pulkit Trivedi further added, "About five years back most people on Facebook used to share content in the form of text. It then, moved to sharing content in the form of photos, which now has graduated to videos. What we believe will happen in the next few years is very immersive augmented reality content that will be the in thing in Facebook. This is The Big Thing that the world is going to witness."

THUMB STOPPING CREATIVE

"The behaviour on mobile is very different; it is thumb driven. People tend to stop at content which looks striking to them. The look of content in the mobile screen should be the number one priority of the creative strategy of brands. The consumers of today has very limited attention and stop only at content they find engaging, so imagery plays a very important role," Trivedi said. According to Trivedi, brands need to look at creating 2-3 seconds of video content that has imagery and brand message upfront, so that when people get the message they can associate with the message and they stop their thumb from scrolling and engage with the brand. Citing successful campaigns, he mention Myntra's and Tanishq's campaigns with Facebook. While Myntra's in app video campaign drove 20 percent uplift in ad recall and 30 percent lift in app engagement, Tanishq's carousel ads ensured three times higher return on add spent with a 30 percent increase in store sales among 25-44 year olds.

To sum it up, mobile is real, it has become an intrinsic part almost every Indian consumer's life, and it has people's time and attention. It has changed the way people discover and connect and most importantly, the way people buy. And the dominance of the influence is only expected to increase in the near future.



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INDIAN FASHION MARKET

BY TANYA KRISHNA WITH PRATIKSHA JONDHALE, PEARL ACADEMY

“Men’s wear category currently owns a dominant share of 42 percent and the shirts and trousers market take a significant 50 percent of the men’s pie. However, the category that one needs to look out for is blue canvas, that is, the denim category, which has a significant share of nearly 15 percent and is expected to grow further at approximately 18 percent.”

—Pakhie Saxena,
Vice President, Technopak

Indian fashion market is growing at a very fast pace and is expected to reach USD 96 billion in the next four years. Apparel which is USD 51 billion, will continue to grow at a steady pace of 10.5 percent CAGR over the next four years and will touch USD 75 billion. A key segment to look out for is the niche category of lifestyle accessories which is going to become 3 times of its size from USD 2 billion to approximately USD 6 billion, growing at a rate of 30 percent CAGR over the next four years. At the India Fashion Forum 2017, Pakhie Saxena, Vice President, Technopak, talked about Indian Fashion Market - its size, key categories, challenges and its share in the total market.

Talking about the channel mix that is going to make up the lifestyle and fashion market, Saxena said, “Brick and mortar modern retail is expected to grow at 7 percent CAGR over the next four years and e-tailing which is currently at USD 3.6 billion will become 5 times its size to become approximately USD 17 billion USD. So the e-tailing market is at a trajectory in India currently and it is expecting to mirror China owing to the key reasons of weak penetration of modern retail and rapid penetration of the internet. Presently, e-tailing is just 6-7 percent of the USD 63 billion fashion market and is expected to grow by 15 percent in the next four years.

KEY SEGMENTS OF LIFESTYLE FASHION MARKET

The women’s segment takes 38 percent share of the Indian fashion lifestyle market, while men’s segment takes 42 percent share. India is unique in this aspect as internationally, women typically have the dominant share. This is expected to change dramatically over the next 10 years and the share of the men’s and women’s category will become equitable at approximately 39 percent each. This is because the women’s segment is expected to outpace the growth of the men’s segment at about 11 percent

technopak





and the men's segment will continue to grow at 9 percent. Saxena maintained, "It's interesting to know that the key segment within the women's wear that will reflect high growth is the ethnic market, marked by the salwar kameez market, which will project a growth of approximately 14 percent. Innerwear, another emerging segment which currently takes approximately 15 percent, is expected to grow at around 12-13 percent over the next four years. A niche category which is small in size right now is the casual women's wear market which takes only 5 percent of the total pie, but it is expected to reflect a growth of 18 percent over the next 4-5 years."

Talking about the men's category, Saxena said, "The men's wear category currently owns a dominant share of 42 percent of total fashion and within it the shirts and trousers market take a significant 50 percent of the total pie. However, the category that one needs to look out for is blue canvas, that is, the denim category, which has a significant share of nearly 15 percent and is expected to grow further at approximately 18 percent because the category marks versatility, high brand engagement, etc."

KEY TRENDS IN FASHION INDUSTRY

Until the 80s, there was no significant attempt to create a business around assortments or products. "It was in the 90s and the 2000s that we had products that were influenced by - Bollywood, occasions specific ethnic wear, and imported products from Asian countries and the UK. And going forward, we believe that because of the two factors - weak modern retail destinations clubbed with the under penetration that the brands are witnessing right now, it is the speciality retailers that will play a bigger role in the coming few years," said Saxena.

The foray of international brands into India can be bucketed into three phases - the first phase was largely initiation which was dotted by the few international brands and the model was largely around the licensing model. It is only in the last 7-8 years, that is, basically between 2008- 2014 that a significant number of international brands forayed into India.

Saxena further spoke about the shopping behaviour of the urban Indian women, which is mostly heterogenous in nature. "She effortlessly moves from: a) international brands to Indian brands, and b) from ethnic wear to western wear. She easily shops from high street malls as well as popular fashion streets, flea markets, and you will find within her wardrobe a mix of variety of brands, across price range and formats," she said. As the customers' day got sliced into various activities and lifestyles, the lifestyle occasions to dress for got further segmented and this led to a brand standing for every occasion.

Pakhie Saxena continued, "We do believe that millennials dramatically impact Indian fashion. There are 400 million millennials in India and this consumer set is very value conscious because they are independent and they earn their own money. They definitely do evaluate the money they spend and the smart fashion that they are getting in return for that

money. And that is one reason we believe that the whole concept of fashion on rent has come up. In addition to the digital wave, these are a few other trends that are coming up."

Accessories until now were looked at as a very entry price template. The category was looked at as a product extension by brands and retailers. However, going forward, the category will prove to be a significant revenue and margin driver and the opportunity to slice them across various lifestyle categories, like, travel or activewear, are tremendous. This category will definitely get momentum in times to come. The category of bags, watches and wallets is expected to grow at approximately by 35-40 percent in the next 4-5 years.

Social responsibility is another trend being witnessed. Consumers are becoming increasingly aware and they look for brands and retailers that give back to society and help those in need. And brands have caught this very fast and have adapted to these concepts.

TO CONCLUDE....

Saxena concluded the session saying, "Developing countries are witnessing pure play e-tailing companies taking the lead in the market while the developed countries are seeing a mix of multi-channel play as well as pure play e-commerce that is driving retailing. Also, technology is expected to play a bigger role as artificial intelligence, 3D printing, etc., representing a new approach to manufacturing." Speciality retailers will play an increasingly important role as compared to brands and departmental stores. The apparel market is evolved from being a need based to a lifestyle based market and that value for money will continue to rule the consumers' minds. And finally, Saxena also confirmed that in the next 10 years, women's market will be at par with the men's market.



KNOWLEDGE SERIES: FASHION INTELLIGENCE

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY



“We are evolving as a market in India. And we will continue to have new categories coming up every two three years that will add to the existing bouquet.”

—Vineet Satija
Associate Director, PWC

The retail industry in India is almost a USD 500 billion market today and is expected to double in the next four years, with apparel being a key growth driver of the segment. The fashion category (that includes apparel and footwear) currently holds a market share of 14 percent and going forward, it is expected to increase to a 25 percent share of the total retail market.

Outlining the forces that are believed to shape the future of the fashion as well as the entire retail industry, Vineet Satija, Associate Director, PWC, began his presentation by accentuating the four main growth drivers by a term— PLGT, an acronym for population, lifestyle, government, and technology.

POPULATION:

India’s population is growing rapidly due to which the demand for products has increased. It is seen that most of this population is comprised of millennials who are inclined towards fashion. “What’s happening is India is growing. The country’s population is expected to increase by 6.5 crores in the next four years, which is almost the size of UK’s population. Another very important factor is that 65 percent of India’s population is under 35 years of age. And third, obviously, the rapid urbanisation that country is witnessing along with a massive rise in the participation of women in workforce,” Satija highlighted.

LIFESTYLE:

The lifestyle of Indians has undergone a massive change in the last few years. In today’s fast paced environment, everyone is time starved. This inherently has also impacted the fashion industry, and has called for a total facelift of the erstwhile template of fashion. Brands, variants, points of sale and other allied options are also exploding in an attempt to keep pace with consumers’ changing lifestyles.

GOVERNMENT:

The government has a big role in the fashion and retail industry. Think of GST or the center’s recent demonetization move, for example. Once GST comes in, it will obviously aid the industry in terms of price. Similarly, the demonetization measure witnessed the rise of alternative payment methods and FDI is going to be a key growth driver, especially once it opens up for multi brand retail.

TECHNOLOGY:

Technology might be in a nascent stage in India, yet the role it plays in boosting effectiveness and efficiency is evident. “The global fashion industry banks heavily on technology. In India, it might be in an embryonic stage, yet there is a lot of technology being employed in the fashion and retail sectors,” Satija addressed. A big part of technology is data. Today, about 2.5 quintillion bytes of data is created everyday. Data also aids in analytics and artificial intelligence prompting intuitive search and personalised experiences.





TRENDS IN THE INDIAN FASHION RETAIL

New categories keep emerging in fashion every 5-10 years. Just like kidswear emerged as a trending category 10 years back and the boom of fast fashion 5 years back, the newest category to emerge in fashion is activewear. “We are evolving as a market in India. And we will continue to have new categories coming up every two three years that will add to the existing bouquet,” Satija added.

At the same time, new consumer centric strategies and services are also coming up. A new service offered by Indian retailers, largely online, is “try & buy”, that aims to increase conversions, reduce returns and develop strong consumer relations. Similarly, a host of other retailers and brands have come up with innovative solutions to increase further convenience to its consumers. A few such examples are cited below:

HomeShop18 and Delhi International Airport introduced a “Virtual Shopping Wall” named “Scan and Shop” at Terminal T3. Passengers can browse the entire range of products and order by

scanning the QR code with their smart phones.

Flipkart launched ‘experience zones’, which enabled its ‘click and collect’ feature, letting consumers pick up their orders conveniently. These zones will be a key element of Flipkart’s rural expansion strategy, enabling it to service smaller towns from pick-up centres.

Brand Factory has developed a ‘bazaar’ centric format to attract mid-market consumers.

Many retailers made in-store digital boards that lets customers design their apparels on a real-time basis leveraging virtual reality. Users can visualize themselves by standing in front of the wall and ensure perfect matching cloths before buying products.

WHAT TO EXPECT IN THE FUTURE

According to Satija, some of the key trends which will dominate retail in the next few years will focus on personalization. “Fashion retail is all about experience, whether online or offline. You have to focus on the consumer and start thinking about giving him an experience. The future

is all about engagement and consumer convenience via specialty stores, mobile payments, faster delivery, micro segmentation, better loyalty offers and technological innovations,” Satija added.

He expounded by drawing on the Fab India Concept Store that leverages the finest in-store experience to its consumers. With an integrated wellness center, cafe, alteration unit, and a kids’ zone, the experience center has products available for every member of the family in different blocks. Kiosks have been placed where customers can find, customize and order their favorite natural daily use products. In addition, he highlighted various other brands like John Lewis, and Nike, that are leveraging technology to provide superior experience to its consumers.

“The key points,” he concluded, “depends on how do we stay ahead of the game by aligning our business ethos to the evolving consumer. A defined set of transformation initiatives, dedication and embracing technology intervention are definitely the call of the hour.”





“Social media, besides being one of the biggest drivers of enhanced vanity, is the theatre to showcase one’s achievements, beauty, style quotient, self-esteem and material success.”

—Hemant Mehta

Managing Director - Media, Digital & Chief Strategy Officer, Kantar IMRB

KNOWLEDGE SERIES: THE CHANGING FASHION CONSUMER, AND HOW THE INDUSTRY CAN KEEP PACE WITH CHANGE

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY

Growing GDP, rapid urbanization, an explosion of choices and brands, mushrooming of shopping destinations and rise of e-commerce are undoubtedly some of the mega changes that we have witnessed, benefitted from and responded to. The Indian fashion industry, too, has been a beneficiary of the growing disposable income and changing lifestyle of the Indian consumer. The consumer base of the fashion industry is not restricted to the stereotypical young, urbane and affluent class anymore; it has expanded beyond geographic boundaries age groups and income classes.

Taking about the changing Indian consumer, Hemant Mehta, Managing Director – Media, Digital & Chief Strategy Officer, Kantar IMRB added, “Rising affluence, urbanization and literacy have changed Indian mindsets and definition of style and grooming. Today, more than half the urban Indian consumers strive to keep up with latest trends (and this number has grown by 13 percent in a year). Even the the role of grooming has been redefined – from looking good to being an integral part of being successful – a 12 percent increase in those who believe that grooming is essential for being successful in life. No wonder then the categories catering to this need – be it deodorants, face washes, beauty creams – all are showing a two digit growth in the last few years.”

Consumer centricity is the glue which binds a brand with its consumers. Hence, it is critical for marketers to keep a constant eye on the evolution and changes that are taking place amongst consumers, their lifestyles along with macro environmental factors. “For a fashion brand to be successful and stay connected with its consumers, consumer centricity needs to form the core of their product, marketing and business planning,” Mehta said as he began elaborating.

THE CHANGING PHYSICALITY OF INDIAN CONSUMERS

Between 1914 and 2014, the average height of Indian men increased by about 3 centimeters, reaching 165 centimeters—or 5 feet 5 inches—while the average height of Indian women grew taller by 5 centimeters to 153 centimeters or 5 feet 1 inch. Even the Body Mass Index (BMI), is fast expanding at both the ends – the underweight and overweight. Almost 27 percent of the Indians are underweight while 17 percent of them are obese and 56 percent are in the normal range.

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“So the question that I have for you is — are we looking at the needs of underweight and overweight consumers who collectively form 44 percent of our consumer base? The trend that we are noting is the growing obesity, especially among men. This segment needs different products and sizes. We recently did a study amongst men to understand about their wardrobes. The study revealed that the top problem with readymade garments is the availability of relevant size, especially for the tops – across demographics. And the fact that sizes differ by brands is yet another concern which has never been addressed or probably even been thought about,” he added.

MEN ARE FROM VENUS TOO

KANTAR IMRB's TGI India study shows that nearly half of all men claim to take special care to enhance their appearance; often by visiting salons. “An audit of the wardrobe of urban Indian men revealed a wide range of garments – reflecting his love for variety, choice of different garments for different occasions and his need to experiment,” Mehta added.

VARIETY IS THE SPICE OF LIFE

Today, a different dress for a different occasion is the new normal. Wardrobes today are segmented and we dress differently for work, for the gym, for parties and special occasions, for lounging at home, for the evening walk, for sleeping, etc. And the list continues to expand with newer aspects and occasions entering our lives. “The gender divide also seems to be blurring. While we have 16 percent of women who wear trousers/jeans as part of their daily wear, we also have 14 percent men who wear a kurta,” adds Mehta.

FASHION - THE NEW FMCG

There has been a paradigm shift in purchase frequency and occasions



—Hemant Mehta,

Managing Director - Media, Digital & Chief Strategy Officer, Kantar IMRB

– from purchasing clothing only for special occasions like birthdays and festivals, we are now in an age of impulse shopping of apparel. The factors responsible are disposable income, growing number of working women, more time being spent out of home, growth in the activities done during weekends, etc. With the need to dress differently for different occasions and increased wear and tear, we notice increasing frequency of apparel purchase. And interestingly, it is men who purchase apparel more often than women. KANTAR IMRB's e-commerce shopping panel shows that men shop for apparel every 48 days as compared to women, who shop for apparel once every 62 days!

Also, accessories have today emerged as an independent fashion segment all together. About 45 percent of individuals from the consuming class (Social Class A, B & C) consider accessories to be an important contributor to their grooming regime. Interestingly, men today outspend women even in accessories.

“Social media, besides being one of the biggest drivers of enhanced vanity, is the theatre to showcase one's achievements, beauty and style quotient, self-esteem and material success,” he stated. And, with that arises the need to look trendy, stylish and different on every occasion as every picture posted

online calls for a new look - new clothes, new accessories and even different make up.

KIDS - THE NEWEST EMERGING CONSUMER

Parents are no longer the decision makers for their kids' needs, including apparel. Kids today have a mind and voice of their own and are particularly vocal in their expression. As per KANTAR IMRB's KIDSCAN (a study amongst kids aged 5-14 years), one in five kids empathetically stated that while buying clothes only they decide what to buy!

THE TOWN CLASS DIVIDE IS NON-EXISTENT TODAY

Today, the small towners (or consumers residing in <10 lakh towns) share the same aspirations as their metropolitan counterparts. Omnipresence of media and e-commerce has made every trend, every brand, every style and lifestyle within easy reach of consumers in small towns of India. growth for fashion online has been faster in small towns as compared to the metros. “We believe that the key reason for this phenomenon is the obliteration of distribution bottlenecks and lack of brand availability. Today, 60 percent of contribution of the e-commerce based apparel shopping comes from small towns and this is true for both men's and women's wear.” shares Mehta.

IT'S THE AGE OF THE COMPLETE 'LOOK'

Today, we find consumers seeking options which offer them a complete 'look' rather than buying individual pieces of garments at any point of time. Hence, there are a substantial number of cases when a kurta is sold with matching earrings, bracelets/footwear or jackets with matching t-shirts and shoes – the complete look as envisioned by the designers/stylists themselves.



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KNOWLEDGE SERIES: DRIVING GROWTH IN THE DIGITAL ERA

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY

Millennials are the most influential demographic for retailers. This technologically savvy generation is redefining purchasing habits and transforming the face of retail with their enormous spending power and devotion to fashion. They are digital natives, are highly aware of the brands and 'best deals', have great purchase frequency and view fashion shopping as a social activity. Also, they see fashion as an expression of their own personality and desire for something made exclusively for them, which is bolstering the trend of customisation.

Very naturally, these consumers are increasingly becoming digitized in their shopping process. "In one of our research, the percentage of participants who said they have bought fashion apparel online is 84 percent. Social media also plays an influential factor in shopping today. Our research showed that as the age group goes down, purchase decisions start getting increasingly influenced by what is going on around in their social network. Online price comparison has also become a standard phenomenon," Neelesh Hundekari, Partner - Consumer & Retail Practice, AT Kearney, elaborated.

Overall, about 38 percent consumers look for digital touch points, and continue to look out for digital touch points at all steps of the buying process. This demographic uses multiple sources and devices to gather information and

tend to compare more information on price and product before making a choice. They read product description thoroughly and browse through numerous reviews, which is very unlike the times when the only way of getting product information was to walk into a store. They also rapidly transit between online platforms and stores, expect seamless integration between channels, seek higher convenience during shopping and expect newer products in every store visit. Also, they expect higher quality of services than their erstwhile peers, especially in terms of product purchase, delivery modes and response from retailers.

"Traditionally, in retail, if you had to grow, footfalls, conversions and bill value were the main priority. Get more people into the store, convert more of them into consumers and ensure that each one of them buys more than what they bought earlier," he added. In the digital world though, what matters most are social media, creative ideas, targeted promotions, competitive pricing and knowing the consumer. Location and store size have become obsolete now. Also, it is extremely important to engage the consumer with increased brand affinity, in store experience, and individualised complimentary products along with delighting the consumer through seamless, and convenient shopping experiences. As a whole, digital retail offers 'some' solutions to traditional retail and creates some new paradigms as well. "Most importantly, mastery over



—Neelesh Hundekari,
Partner - Consumer & Retail Practice, AT Kearney

technology and social behaviour are as much of success factors as the product itself," he added.

Hundekari expounded on how effective social media campaigns can be used to increase brand presence. Citing *Burberry's* example he said, "Burberry used Snapchat Discover for the launch of their fragrance line. People who were in the store could actually scan a snapcode and find the content online. They tweeted backstage visuals and unreleased collection extensively," he added.

He also cited examples of other brands including Van Heusen, Asos, Nike, Uniqlo Marks & Spencer, Zara etc., and showcased how the use of digital platforms to target correct market segment helped generate significant customer interest.

Van Heusen's campaign, 'Most Fashionable Professional' targeted their TG, the young working male professions who have just graduated and are earning good. The campaign, run on

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Linkedin, urged users to nominate one from their network who they believe is the most fashionable at work. The amount of response that it generated was phenomenal and it went down as one of the most successful campaigns in the history of the fashion industry.

Asos bought access to Edited, a London based start up which aggregates fashion trends and retail information from retail sites, industry mood boards, social media and trend blogs with more than 70 billion data points. Edited provided key real time insights on competitive pricing and product assortment helping in reducing wastage due to discounts. Also, customised queries could be made for every category or type of clothing.

Nike has registered how continuous customer engagement using social media can increase brand affinity. Nike has now become one of the most followed brands in social media with 28 million followers on facebook, 4 million followers on twitter and 20 million downloads of the Nike+ app. The brand has also went ahead to deepen their customer relationship through personalised content and training services in apps like Nike+, Run Club and Nike+ Training Club.

Another interesting technology is UMood, that *Uniqlo* uses. Once a customer enters the store they show various videos and measure the responses of the consumers which allows them to predict the type of designs that the said customer is likely to prefer. UMoods algorithm employs metrics like interest, concentration, stress, and drowsiness to measure a customer's response to videos. It then matches these responses to a collection of 6000 t-shirts which were assigned mood types using surveys and suggests best fit.

US based designer label *Rebecca Minkoff* used technology to innovately

offer complementary products to consumers driving high sales. The brand used magic mirrors that recognises products bought in using RFID tags. Shoppers can see the products styled with different looks as well as in other sizes and colors. Enhanced fitting rooms increased customers' time spent in stores and consequently, the average bill value.

Zara's new technology enables them to create designs on the basis of customer preferences. It records real time data from stores, online sources, regarding the interests and preferences of customers. It then analyzes performance of individual features of different SKUs - e.g, they might identify that pants with patches sell better than pants without patches, or that certain colors move faster. Zara then uses these insights to design their products and delivers them to stores within 2-3 weeks facilitating the "see now, buy now" trend.

Using digital to create an omni channel presence, *Marks & Spencer* makes purchases more convenient. It launched a platform for customers to access stock levels of items that they can buy and collect it next day from their local store. Their mobile app allows users who are unable to find a particular item, to scan the barcode of the product, and if it is available elsewhere, have it delivered to their local store or homes. The app also synchronizes the virtual shopping basket that a customer has created on the website with their basket in the mobile app.

Shoes of Prey, the online retailer considered a pioneer in customised fashion, hosts an e-commerce site that allows users to create their own custom shoes with over 3,00,000 trillion combinations. Users can design a complete shoe starting from the fabric, style, color, heel height and going up to the straps and bows. Complete customization eliminates redundancies in stock - and has had a return rate of just ~20% - higher sales.



"Physical and digital has to go hand in hand, a congruent experience and technology led integration of physical and digital channels is essential to provide ease of shopping to customers."

—Neelesh Hundekari

Partner - Consumer & Retail Practice,
AT Kearney

"The aforementioned brands have observed a clear impact of leveraging digital technology in their businesses. Burberry's revenue jumped from 743 million pounds in 2006 to 2,523 million pounds in 2015. By continuously refreshing stock, Zara influences customers to visit its store 5X times than its competitors' stores. Over 6 million pairs of shoes have been custom designed since the launch of the Shoes of Prey website. Use of analytics helped Asos with a 37 percent increase in revenue and 33 percent sales growth in the last quarter of 2013," Hundekari added.

Digital is not easy - even basic omni-channel presence has challenges. But brands need to overcome these challenges and embrace digital as the road to future growth. "Physical and digital has to go hand in hand, a congruent experience and technology led integration of physical and digital channels is essential to provide ease of shopping to customers," he said concluding the session.





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EDITORIAL MEET: UNIQUE STORE PROPOSITIONS

There is little doubt that online retailers are giving physical stores a hard run for their money. Since products are similar on both platforms, the only differential can be – differentiation. In an ideal world, physical stores should play to their strengths and tap into what differentiates a physical store from an online one. But the question is – which kind of ambiances, experiences, installations will get customers to ditch their computers and walk into stores?

BY NUPUR CHAKRABORTY



“To those who say that the customer has evolved to expect more, I say that retailers have actually not evolved at all. As retailers we are not maturing well enough to deliver real service.”

–Rajneesh Mahajan
CEO, Inorbit Malls

Retailers worldwide are already experimenting with differentiation – building strategies that surprise and wow shoppers. Last year, for instance, American retailer Urban Outfitters bought upscale pizza shop Pizzeria Vetri as part of a plan to build stores that turn shopping into an event.

However, experiential retail doesn't have to involve the drama of installing restaurants in stores. It can be far simpler and more intuitive to maximise the already-present – lighting, store design, in-store tech, etc., that are particularly critical for fashion experiences. To find the answer, retailers could turn to their data and convert quantitative intelligence into sensory, differentiated experiences, experts believe.

But the solution may also lie in simpler approaches, as speakers at the IFF 2017 Editorial Meet on Design and Consumer Engagement – In-store ambience strategies noted. Moderated by Sheetal Choksi, Brand Strategy and Marketing Specialist and Unilever Accredited, the panel included Anand Aiyer, Senior Vice President and Business Head – Easybuy (Max Retail), Lifestyle International; Anil Shankar, VP – Solutions & Technology, Shoppers Stop; Animesh Ikshat, Head - Projects & VM, Benetton India; Anupam Bansal, Executive Director, Liberty Group; Darshana Srivastava, Head of VM, Gap, Arvind Lifestyle Brands; Pooran Jaiswal, CTO, Globus; Rajneesh Mahajan, CEO, Inorbit Malls; Santosh Dubey, Head – Projects, Bestseller and Vardan Sharma, Head of Marketing, Retail B2B Business, Philips South Asia.

Opening the discussion, Inorbit Malls' Mahajan asserted that most retailers appear to over-analyse the concept of customer experience, while failing to notice the information falling through the cracks. “The fundamental problem with data-driven intelligence is that a retailer cannot capture what the customer is NOT buying,” he said.

“Despite all the micro-specialisation of analytics, data cannot capture the sales being missed, but the store manager can,” he pointed out, adding to the immense challenge of analysing every walk-in and/or transaction in a high-footfall destination such as a mall. “As a mall developer, I cannot analyse 10 lakh people walking into 200 different stores, buying from some 38 different categories a month! It is impossible to track their journeys, and generate meaningful insights,” he adds. “I think most retailers are missing the woods for the trees as far as data interpretation is concerned,” Animesh Ikshat said. “We need to focus on qualitative data, in other words, observational research. No one in India has acknowledged

PHILIPS

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the need or the potential benefits of observational research of consumers," he added.

But, given the dynamic and diverse nature of how consumers behave, is it also not true that observational data is what store managers and not technology tools can gather, Bansal asked.

"But store managers function basis their biases, not basis the reality," Ikshith pointed out. "Perceptual biases of a product not selling well, in a store manager's mind, may not actually tally with store results. Observational research, which is sans all biases, and basis absolute observation of situations come with precise information on consumer behaviour, rather than anything else. The truth is, as retailers, despite having the infrastructure, we are not utising it, including the data we all have, optimally."

Mahajan also pointed to the information 'overload' that many consumers today are faced with, with retailers' promotional texts buzzing on their phones every few steps in a shopping centre. "It is annoying! Customers are in physical destinations because of the experience and the romance. As a customer, if I didn't want to enjoy the romance of being in a social space, I would buy things online!" he stated.

MAKING IT PERSONAL

High traffic volumes also limit the possibilities of personalisation of customer experience, the panellists agreed. "Some customers may not want those text messages, and some customers will want them. It is very difficult to understand how to balance this. I say we limit the use of technology intuitively; currently most retailers are investing in all the basic standard technology tools without investigating their benefits or engagement with customers," Anupam Bansal noted.

Endorsing this outlook, Bestseller Retail's Santosh Dubey added that for Bestseller's brands Vero Moda, ONLY and Jack & Jones, customisation of the shopper experience is defined by target age group, not by specific customer types or tastes.

"I believe the question is not really about the technology to deploy; it is about the emotion to satiate," Choksi observed.

"Consumers' ability and preference to see, to touch, to feel and to be emotionally engaged means that brick-and-mortar retailers have plenty of opportunities to create 'wow' moments through tools such as emotion-based lighting," Sharma said, seconding Choksi's view. "The question is, to what extent can you personalise?"

In their rush to get more 'with it', many retailers are losing sight of the fact that their add-ons may not connect with their customers' needs, he said. "Retailers have to accentuate only those experiences that are relevant for the shopper," he asserted.

Visual merchandising is a focal point of experience today, Darshana Srivastava stressed. "Most fashion stores are now no-door outlets. There is a completely transparent, wide-angled visual experience that lets retailers show off products, colours, styling to much greater impact, even for transient traffic," she said.

Referencing the GAP protocol on in-store experiences, Srivastava elaborated on the concept of 'commercial visual merchandising'. "We match the data with the visual merchandising strategy. The more you understand localised VM, the more fine-tuned store presentation gets. At GAP, we deploy differential lighting to make customers see what we want them to see, what we want them to buy. Our store fixtures are also designed and placed to navigate



"Video walls are being deployed in some stores, but these play just videos. Down the line, the same video wall will have touch enablement, a camera, sensors, scanners. That's when a world of opportunity will open up."

—Animesh Ikshith,
Head - Projects & VM, Benetton India



"We match the data with the visual merchandising strategy. The more you understand localised VM, the more fine-tuned store presentation gets."

Darshana Srivastava,
Head of VM, Gap, Arvind Lifestyle Brands;



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"It must be remembered that India is a large country with tremendous disparity in tastes. And that is precisely why brands cannot have a standard model, when it comes to customer experiences."

—Anupam Bansal,
Executive Director, Liberty Groupy



"Consumers' ability and preference to see, to touch, to feel and to be emotionally engaged means that brick-and-mortar retailers have plenty of opportunities to create 'wow' moments."

—Vardan Sharma,
Head of Marketing, Retail B2B Business,
Philips South Asia.

customers to certain spaces," she said. For global brands with institutionalised design and VM guidelines, customising experiences for differing sensibilities in tier-I versus tier-II locations, while maintaining sanctity of the standardisation is also a challenge, the panellists noted.

Referring to Starbucks as a case study in outstanding — and yet custom designed experience, Rajneesh Mahajan noted that while every store of the coffee chain features the same signature theme, store design is customised for each location. "Every Starbucks outlet is tailored for size, floor, location, the micro-market — be it in a mall or on a high street."

Referring to the common conflicts between VM and Projects teams in retail organisations, Choksi wanted to know how the two arrive at mutually beneficial in-store strategies. Admitting to some disagreements between these verticals (especially pertaining to cost management), Dubey disclosed that strategies can often be damaged if guidelines are not communicated through the chain. "We've seen that at some fashion stores, store managers often shift fixtures away from designated areas to less optimum spots. And that destroys the visual and customer experience. The reason is that the VM guidelines have not been adequately conveyed to the customer-facing staff," he said.

But if the customer journey has been mapped in detail already, how do VM tools change location after the store has opened, Choksi asked. "And how we ensure that random acts of disruption in the in-store experience are not repeated?"

BEING GENERATION-NEUTRAL

With the modern marketer's attention being trained on millennials as a shopper class, the discussion also touched upon retail experiences relevant to specific generations.

"The baby boomers are obsolete; this obsolescence has to be factored in as brands develop experiential add-ons to their stores," Ikshit stated. "We need to start focussing on the millennials and because of this generation's intimate engagement with technology, the analytics that accrue can help retailers to find experiential opportunities."

"Millennials are not terribly confident, nor do they have healthy wallets. What they have is information and gadgets. They want feedback and social acceptability on media for everything they buy. But if a store is not enabled to facilitate this, they may not transact there at all," he went on to add.

According to Ikshit, just the mere act of sharing WiFi passwords with walk-in customers has the potential of boosting sales by 10 per cent over and above the norm. Having said that, he concurred that the current optimisation of in-store technologies in India is far from impressive and will likely touch its zenith in about 2-3 years' time. "Right now, video walls are being deployed in some stores, but these play just videos. Down the line, the same video wall will have touch enablement, a camera, sensors, scanners. That's when a world of opportunity will open up," he elaborated.

How do brands like Liberty and Easybuy — whose TGs stretch across generations — balance the experience for millennials and Gen Xers? "At Liberty, there is simply no way we're going to ignore our older customers," Bansal said. "That being said, we certainly also need to appeal to younger consumers. It must be remembered that India is a large country with tremendous disparity in tastes. And that is precisely why brands cannot have a standard model, when it comes to customer experiences. One has to localise in each store."

There is added complexity in the fact that it is not just that customers are



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different across markets, Mahajan added. "The same customer, in fact, behaves differently at two different stores," he pointed out.

"Retailers with smaller stores have limitations in terms of offering a full-bodied view of the brand," Ikshit said, adding that such retailers could especially benefit from deploying dynamic technology tools that offer customers a full view of the brand's range.

Value retailer EasyBuy, whose primary target group is families, approaches the subject differently. "Millennials comprise the secondary audience for us," Aiyar informed. "So we need to offer a balanced experience. The primary goal of our technology deployment is to facilitate convenience and speed at checkouts. To

appeal to the younger set, our stores are also enabled with WiFi and hotspots so that millennials can take pictures/ videos and share them for recommendations and feedback," he added.

There is also the other kind of customer, especially in smaller towns, who want a guided experience, Aiyar elaborated. "Small-town consumers are definitely aspirational, but not necessarily able to make the right choices in what to buy and how to wear it. Here, the guided engagement is critical to the overall shopping experience," he added.

In Mahajan's opinion, two retailers that stand out in customer experience and store design are Disney and Starbucks.

Disney refers to its store staff as cast members. To the retailer, the store is an

ongoing show and every sales associate on the shop floor is playing a role. "Contrast that against many department stores, where often associates are huddled together in idle chit-chat, even as tissues and sundry waste litter the floor," Mahajan said.

"To those who say that the customer has evolved to expect more, I say that retailers have actually not evolved at all. As retailers we are not evolving to deliver better service. Any sari seller even in a village knows that after the customer leaves, the sari goes back into the shelf. Many modern department stores don't practice even this basic discipline of store presentation," he said, at the close of the discussion.



And their eyes lit up

The Deichmann store in Die Promenaden shopping mall is right in the middle of Leipzig's main railway station, competing with more than two dozen stores to its either side for shoppers' eyeballs. This situation raised important questions for Deichmann: How can we set ourselves apart from the other shops and give our shop an individual edge? How can we attract maximum attention? What lighting will help us meet our customers' expectations? And how can we do this as economically as possible and with as efficient use of energy as possible?

The Solution — a lighting audit carried out by Philips Lighting provided the answers to all these questions. It resulted in the installation of a modern LED lighting solution and an intelligent lighting control protocol. Philips first concentrated on the shop windows, the shop's calling card: its street facing windows. A shop façade typically has just a few seconds to grab the attention of passers-by. Philips wanted to maximise the probability of these passers-by calling into the shop, and it used the 'Dynamic Shop Window' concept to do this. This offers lighting that works

dynamically and displays both the overall arrangement and each individual pair of shoes to great effect.

Dimmable StyliD Projectors, which are controlled by the Philips Dynalite system, were fitted using different output angles. The spotlight is therefore placed on specific product groups in turn. The dynamic lighting display creates an effect of movement in the shop window. This arouses the curiosity of nearby people and draws their eyes even when they are looking in other directions. They become aware of the light setting out of the corners of their eyes. As soon as customers enter the store, they are greeted with a pleasant lighting atmosphere that encourages them to take a closer look at the shoes on display. To ensure uniform backlighting, the ceiling was fitted with the CoreView Panel, an extremely flat recessed luminaire providing high-quality light. It is supported by fixed and swiveling downlights from the LuxSpace Accent LED product family.

These modern lights take over the task of effectively illuminating the shoes and

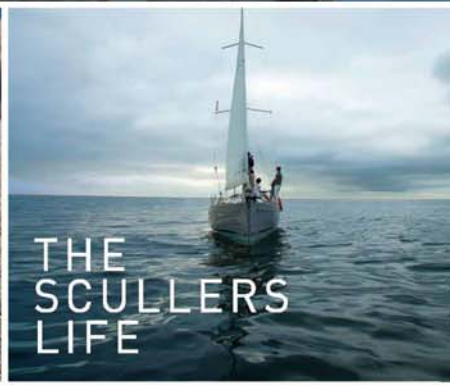


boxes on the shelves at ceiling height. They are arranged so that all shoes are shown off to their best effect, even those on the bottom shelves. StoreFlux LED modular recessed downlights work as accent lighting, showcasing individual areas. They ensure that the photo displays look modern and trendy, while the shoe shelves in the room are brought to life.

Wolfgang Turrek, Technical Director for Deichmann SE, says, "The new lighting scheme ties in perfectly with our shop concept. The shop windows are a real highlight. Thanks to the dynamic lighting, it looks extremely exciting and is a real eye-catcher."



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RETAIL TRENDS AND MARKET INTELLIGENCE

BY TANYA KRISHNA WITH PRATIKSHA JONDHALE, PEARL ACADEMY

At one of the sessions in India Fashion Forum 2017, Erica NG, Senior Editor, WGSN, talked about the two major trends important for retail. Erica quoted Macey's chairman when he had said, "This is an exciting time for retail because our back is against the wall," at the World Retail Congress in Dubai. And Erica agreed with the same. She said, "Traditional retail used to be about a few keys or just two keys, that is, product and place. Added with a bit of creativity, people and promotions, and retail business is born, and then scale it up by distributors or franchisees. But now, this has completely changed by consumers who are more empowered courtesy the mobile technology and social media. For retailers, it's about meeting the consumers not for what they buy from them, but about anticipating the needs and giving them what they want whenever and wherever; it's about making the consumers feel special with personalization and customization and that is where trend forecasting comes in."

TRENDS FOR RETAIL:

Shift to the Serviced Lifestyle: This consumer trend is growing as the consumers are evaluating experience over products. This trend tries to understand what the consumers value today and how they want it to be served by them. Consumers today value more about experience and less about transaction and ownership. This new generation of consumer has a very ambiguous relationship with product

and owning products; and it means that the experience of having something is more important than before. This leads to more fashion brands creating experiences beyond their core product, either by launching a brand or hosting an event. This trend is about going to where the customer is.

Talking further in detail about this major trend, Erica said, "Millennials are a generation who live through financial crisis and they don't want to take any debt, overspend their credit limit or own a lot of products, for undergoing a lifestyle change. This is now a global trend and the present generation is also known as 'generation rent'. In just 9 years time, 60 percent of people living in London will be renting and young people will be the majority of it. In US, home ownership rate is falling for the last 8 years. And in Asia, young working professionals are moving into smaller and smaller apartments but paying the same amount of rent."

According to a global survey by Nielsen, 68 percent of online consumers are willing to share or rent their personal items, 66 percent are willing to use products from others in a shared community. And, Asia Pacific consumers are the most receptive to share communities with the highest percentage of willingness to share their own goods. Consumers now are less interested in owning products and this is further complicated by them as the millennials are the most anxious generation and the challenge of living in an affluent society is that there are



"This has brought to the fore a trend that we are calling 'Instagrammable Retail' and it's really just about making your store more flexible and more striking."

—Erica NG,
Senior Editor, WGSN

too much of choice and too little time. Something that may resonate with many busy consumers is this notion of eliminating choice from the processing process. A majority of the population now are self-employed as entrepreneurs or freelancers and unlike earlier times, when they used to check into Starbucks and other coffee shops, now these self-employed people are heading to shops, lifestyle and fashion stores. For retailers, there is an effective way of creating a community of like-minded people who are loyal to their brand and who want to be seen working in their space. She cited an example of a retailer looking to create a meaningful presence—Apple's new concept store in San Francisco. The brand states, "We are not just evolving our store design. The purpose or the

greater role in the community is to educate and entertain visitors and serve our networks of local people.”

Next, moving on to the trend of fitness, Erica talked about store experiences that leverage on the fitness trend by adding something extra than just hosting fitness classes in the store. She said, 45 Grand is Nike’s invite only women’s fitness studio in New York. The space includes a fitness studio, a showroom where Nike VIPs can work with their trainers and look at pieces from the current and special edition from the women’s collection, and everything is invitation only. What this adds is a sense of exclusivity. Exclusivity now is not what consumers look just in luxury anymore. It gives them a sense of uniqueness, a one to one relationship that they yearn for when they communicate with a brand.”

Eating out has increasingly gained more value than shopping, especially among millennials. Erica said, “We see rising income levels across regions and they have more money for entertainment and lifestyle. After spending on clothing and cosmetics, food is the next category that has a huge potential. Food plays a major role in Asian society and so, embedding that in stores draws in a new set of customer base for a brand.”

Erica also talked about the Dolce and Gabbana flagship store in Milan, which is designed as the brand’s new experience space. The brand has also stated that this flagship store marks the end of its traditional store philosophy of uniform store formats and standardized strategies. Instead, it is moving towards a new formula where experience and story-telling is the focus.

Consumers’ relationship with a product is changing. One can borrow it, own it for a while, can pass it on, share it or trade it. The future is seeing consumers who look at owning a product as a burden. The new rules of retail engagement draws a line between hospitality, entertainment and

lifestyle and the retail spaces are now bringing all these retail experiences beyond fashion together to appeal to the consumers whose interests lie much beyond fashion.

Next Generation, New Destination:

This trend is about the maturing mobile consumers and how their mobile behaviour had lead to fragmentation of retail destinations, particularly with new online business models and chat commerce. This trend will look at how retail can tap into the digital drive by remodeling and re-positioning physical space, so that this hyper connected mobile consumers would want to connect with the businesses in social space and in stores.

Talking about the usage of mobile phones and social media by millennial consumers, Erica said, “Consumers are spending 1 in 5 mobile minutes on Facebook and Instagram and just 5 apps account for 88 percent of the time they spend on mobile devices and none of these five apps are branded. They are social media and chat apps. Different age groups have different mobile usage behaviour. But inarguably, more and more time is spent on mobile phones not just for communication or shopping but for finding inspiration, discovering new products, sharing what they’ve bought and this device is becoming the platform to do all of that.”

There has come a completely new competitor set for traditional retailers, in the digital space. Besides Amazon and Alibaba, there are start ups and even individuals filling a niche with specific service offering. This fragmentation of retail journey is creating a momentum for third party retail. In Asia, third party retail is coming in the format of internet celebrities and social shopping. And social media has grown from being just about sharing and consulting friends on what to buy, to become a shopping channel/destination. Similar trends are being seen where individuals are becoming highly influential in fashion marketing.

Next, Erica talked about the ever so trending ‘conversational commerce’. “Facebook made the splash last year turning the messenger app into an e-commerce platform. They launched an API that allows any business to create a robot that can communicate with the customers through the messenger,” she said.

Store Design: What does this mean for store design when people are on their mobile phones? Erica reiterated, “This has brought to the fore a trend that we are calling ‘Instagrammable Retail’ and its really just about making your store more flexible and more striking. Beyond store design, its also about tapping into this consumer group’s fear of missing out and creating something that’s exclusive. Globally, we are seeing 400 million monthly active users on Instagram including some 75 million who use it every single day. With that in mind, its not just restaurants, but also stores that we are seeing. They are changing how they merchandise so that they can tap into this group of consumers who are obsessed with Instagram.” The idea is to represent the brand beyond products.

Pop Ups: There is a resurgence of pop up stores around the world. Pop ups are for a very limited time and when the consumers are sharing everything on social media, the idea is what experience a brand or a retailer can provide in their pop up stores to make it special and shareable.

Erica summed up by advising the retailers, “Now that the consumers are more interested in experience rather than products, it is time to put in place all the infrastructure, the pipes to connect themselves with all these new retail destinations online like, messaging apps, third party retail, online influencers, etc.” She further said, “The human element is what’s adding value at this moment. It can be store, online or chat, but adding that genuine experience beyond just playing with a new technology is crucial.”





FASHION TRENDS SPRING SUMMER 2016

BY GURBIR SINGH GULATI WITH RASHIKA GUPTA, PEARL ACADEMY



—Brian Tam,
Designer and Marketing Consultant, The
Woolmark Company

The Woolmark Company aims to inspire and inform the textile industry, fashion professionals and retailers about the vast potential of Merino wool. The Wool Lab from the Woolmark Company is an innovative seasonal sourcing guide to the best wool fabrics and yarns in the world. It showcases real samples of commercially available fabrics aligned to the season's macro-themes and is created twice a year by a result of extensive research undertaken by company's global network, it showcases the best wool fabrics and yarns worldwide, and identifies the emerging themes from fashion and other fields, in art, pop culture, music, movie, and lifestyle along with the artistic, cultural, socioeconomic, and lifestyle influences that will affect the future of style and design. Each edition of The Wool Lab includes swatches, mood boards, colour cards and presentations that tell a story for each of the themes and encourage brands and retailers to view and source wool as a premium fibre.

Launched in June 2011 for the Autumn/Winter 2012/13 season, with the first Spring/Summer 2013 edition released in January of 2012, it features two editions – Autumn/Winter and Spring/Summer every year. While The Wool Lab is presented globally during the most important trade shows including Intertextile, ISPO, Première Vision, Pitti Uomo and Pitti Filati, it is presented and available for consulting in 13 countries across the world. Viewing of The Wool Lab is available free of charge and upon request.

ENGLISH GENTLEMEN AT LORD'S

Inspiration of the theme: The theme is inspired by the iconic Lord's Cricket Ground, the spiritual home of England's most elegant and classy game. The tailored theme represents a powerful combination of beautiful materials - principally Merino wool and fine lightweight Cool Wool with first class craftsmanship. This is a reminder of the fact that London is the world capital of masculine classy style, and has been so for over two centuries. Styling included Merino Wool and lightweight Cool Wool suits, sports jackets, blazers, and waistcoats with matching trousers pastel colours tones.





It is not just a celebration of all things cricket but also of Savile Row tailoring and the shoemakers and shirt makers. So, it's really about classic men's dressing and idyllic life in the Lord's Pavilion.

ONE PIECE

Inspiration of the theme: The fashion trend is inspired by the 1970s. It is about individuality and confidence, about "Freedom", "Identity" and "Personal Expression" of the modern women. From the dresses to the jumpsuits, the one piece, with its multiple styles, is the new wardrobe star for women who

choose the comfort and sharp shape of a single cloth for an up-to-date style. The Spring/Summer 2018 season leads us into an essential kind of aesthetics emphasized by simple forms, graphic lines, geometric patterns, and minimal collage.

Examples include loose one-piece garments like, boiler suits, dresses, flight suits, jumpsuits, coveralls, one-piece pajamas, romper suits (for babies), saris, sarongs, ski suits and togas. It also includes make-shift one-piece garment used when going to and coming from the shower, like bath robe, dressing-gowns, towels, along with skin-tight one-piece garments like catsuits, diveskins, leotards, one-piece swimsuits, unitards, wetsuit, etc.

Colors include white, black, beige, blue, bright colours as accents in materials like wool, wool/cotton, wool/tencel, wool/silk in structures and patterns like plain, twill, jacquard, and print. In jersey and knitwear fine jersey and striped jersey will prevail.

FLEA MARKET

Inspiration of the theme: The culture of creating your own style by searching out unique pieces full of personality in flea markets across the world, seeking for emerging young brands, mixed with timeless and vintage pieces.

Four of the best flea markets in the world are the Brooklyn Flea in New York, Portobello Road in London, Clignancourt in Paris and Porta Genova's Sunday Flea Market in Milan. In the fashion world, what is old is new again. Fashion trends have been constantly re-evolving over the decades. Vintage clothing frequently becomes the inspiration for many new trends in terms of style, material, designs and fabric. Teenagers mixed with timeless and vintage pieces, become the style of all generations both for men and woman in a very stylish way.

SECRET GARDEN

Inspiration of the theme: The simple elegance is inspired by a florist's intimate world. A way of life — comfortable, relaxed, positive, and humble. Gardening is about to become fashionable. With the growing earthy, green, return to nature philosophy, garden inspiration is starting to turn up everywhere.

Fashion and gardens are an irresistible mix. So many designers have been inspired by gardens through the centuries and this theme is a fascinating illustration of how nature has influenced both how fashion looked and how they have been worn over the years. Designers from Valentino, Alexander McQueen to Philip Treacy and so on continue to be inspired by gardens.

Nature reconquers urban spaces thanks to a new generation of stylish gardeners, who are representative of a 'living and working locally' approach to life. Traditional workwear combined with a stylish and personal touch is their day-to-day wardrobe. In short, this collection is a beautiful simplicity.

Colours in this collection include a lot of neutrals, green shades, blue, lavender, and red as accent. Materials include wool, wool/viscose, wool/linen, wool/cotton, wool/rayon, wool/tencel, wool/silk in structures and patterns like plain, panama, twill, stripes, dobby, chambray, gauze, nature elements print, micro pattern, denim, double face, etc. Jersey and knitwear include jersey and terry cloth.

ON THE ROAD

Inspiration of the theme: The desire to travel aimlessly. The spirit of freedom that has always driven young people to discover the world in search of themselves, without thoughts. It also draws inspiration from the Beat Movement classic, *On the Road*, by American writer Jack Kerouac, written in 1951, and published in 1957.



It integrates the Beat Movement into the trend by using pieces that are created with new and free standards, questioning the origins of classic pieces like the plaid shirt or the tweed skirt, and experimentation with new structures such as oversized plaid shirt or the denim jacket, a true American classic, remains unchanged or cut into different length. Overall, it's classic American style mixed with bohemian rebel attitude.

Colors include dark and light blues, yellow, orange, brown and military greens in materials like 100 percent wool, wool/cotton, wool/linen. Structures and patterns include checks stripes, prints, and denim. Jersey and knitwear include terry cloth, mélange jersey, and fleece.

LABORATORIO

Inspiration of the theme: A new way in fashion; old techniques, experimental technologies, and fresh minds all mixed to create and transform materials into unique products. It's the new generation of artisans that creates their own style like modern alchemists in their laboratories. Patterns are taken out of the archives and memories of handlooms come back to a new life.

Wool is used mixing old and new technologies to create not only textiles for garments but also for homeware products that take part in the "new artisan world".

It encompasses a bold mix of colours in materials like 100 percent wool, wool/silk, wool/linen, wool/cotton, wool/polyester and structures and patterns including all possible surfaces. It also features myriad techniques like hand prints, hand stitching, hand embroidery, coating, hand dyed, etc.

The Woolmark Company unveiled the Wool Lab SS 2017 with a focus on wool in the sport industry.



THE WOOL LAB SPORT: ACTIVE

Inspiration for the theme: The most technically performing wool fabrics and yarns, mixed with technical fibres, to ensure the best results during physical activity. Examples of this theme highlight technology enriched with the most innovative finishing treatments, suitable to match every climate and discipline, both indoor and outdoor.

Materials include 100 percent wool, wool/polyester, wool/polyamide, wool/polyurethane, wool plus cordura in plain, checks, double weave structures and patterns and in colours like black, grey and all bright colours. Jersey and knitwear includes seamless, plain, rib knit, Rome stitch, fleece and fake fur.

THE WOOL LAB SPORT: ATHLEISURE

Inspiration of the theme: Athleisure blurs the line between fashion and activewear, with the latter being used in a non-active, casual way with a modern, stylish look. Merino wool's ability to combine comfort and flexibility with casual elegance positions it well to cater to this growing market. Athleisure is not a fad, it's a lifestyle. It's not just about jogging and running shoes, it's the point where activewear fully merges with regular streetwear. It incorporates stretch fabrics, but it doesn't look like something you'd wear to the gym. Materials used include

100 percent wool, wool/polyester, wool/silk, wool/polyamide, and wool/tencel in structures and patterns like bouclé panama, herringbone, diagonal, hound's-tooth, jacquard, and padded wool. Jersey and knitwear encompasses fleece, piquet, open knit, double jersey and fake fur. Colours remain neutrals and colour accents.

THE WOOL DENIM

Denim is traditionally a twill fabric made from a dyed cotton warp and an undyed weft yarn. In the years gone by, wool and cotton have been blended together intimately to produce a wool/cotton blend denim fabric. Machine washable wool yarns have led to a more cost-effective way to produce wool denim. Because the wool yarns being used are 100 percent pure, consumers benefit from the fibre's attributes including its natural resilience and elasticity to create new textures, drape, next-to-skin comfort, and most importantly, increases the level of warmth in your jeans.

Although the style factor has not been compromised and the topside of the fabric retains the same aesthetics as cotton denim, the real difference is on the underside of the fabric - the wool side. Because of this, it offers a greater level of warmth, especially when pulling on fresh jeans on cold days. Also, wool denim fabric feels much softer to touch.



EXCLUSIVE:

DON'T SELL A PRODUCT- MARKET A LIFESTYLE

-HARLEY DAVIDSON

BY GURBIR SINGH GULATI WITH RASHIKA GUPTA, PEARL ACADEMY



—Pallavi Singh,
Director- Marketing, Harley Davidson

A brand, its dealer and its customer talked about the brand's ethos. Pallavi Singh joined Harley Davidson in 2009 and described her journey with the cult brand. When she walked into the Indian offices it was disappointing for her to see just 5 work stations in lieu of the mammoth image of the company she had in mind. But her perception changed completely when she visited the birth place of Harley-Davidson, in Milwaukee, Wisconsin.

It was there that she realised that she is part of something big. She understood the brand's vision that Harley does not sell a product it markets a lifestyle. She met Willie G. Davidson who told her one thing that "You along with so many more people in your country are going to ride Harley motorcycles and you will experience something which will surprise you." "Well it has definitely surprised us in so many ways," Pallavi says, "We have grown by leaps and bounds and we have understood one thing which is that you have to bring the same experience and the same lifestyle which is visible in the other parts of the world. This is what we have been working on since 2009. Since then we have focused on how to make this great product a lifestyle."

Harley Davidson is a 114 years old brand with 1,400 dealers across 92 countries in the world. It also boasts of one million Harley Owners Group (HOG) Members around the world. Pallavi's passion for

this charismatic lifestyle shows up as she said, "Harley is all about buying an identity and not buying a product. It is about one's personal expression of who you are and what one stands for- it's an image of yourself. Harley Davidson is not a need it's a want. Everybody cannot own a Harley Davidson and everybody does not belong and there are reasons. For this There are desires, there are needs and there are wants. When one buys a Harley, he crosses a frontier and becomes something else and that is why it is not a brand for everybody, rather it is a brand for the brave hearts. We are bringing life in the soul of a rider. The most important aspect of our brand is that we have stuck to the true value and authenticity of Harley Davidson from 1903 till today. We at Harley fulfill dreams of personal freedom and we give our customers a reason to ride. We are 114 years old but still relevant to the generation of today."

Otis D'Souza, a passionate customer and proud owner describes what owning an Harley Davidson can do to a person. "I must have been 19 or 20 years old when I first dreamt of owning a Harley Davidson. I loved two wheels and that



is where I realized that motorcycling is in my blood. Then my lifestyle led me to meet people who owned and rode Harley Davidson. They were something about them; they were not like everybody else. They were unique, they had their own passions. But the one attribute which I admired the most is that they were unapologetic about who they were. This was what stuck to me and on December 30th 2010, I got myself my Harley. I was 47 years old, grey haired and it took 27 years for that Harley to come to me."

Otis further adds, "I have finally found myself. To me Harley is neither a product nor a brand. To me Harley is LIFE."

Arjun Bafna, Harley Dealer Partner shared his experiences and said, "I have been working with this company from the last 6 years and trust me there is not a single word or a statement by which I can say that this is what Harley Davidson is. You have a customer like Otis who has tattooed the Harley Davidson insignia on his arm. Think about any brand which you will do so. No one but Harley." When it comes to selling this brand, the only message I give to my team is to respect the customer that walks in and communicate with him properly. If I look at this business from the balance sheet and profit aspects, then we failed in 2010. But, in the last 6 years, we have become the best dealership in the country for Harley in terms of delivering customer experiences."

X



BUYERS BRIEFING- A/W 17-18

Speaker: Priya Sachdeva, Business Director- South Asia, WGSN

BY TANYA KRISHNA

As the industry moves towards the Autumn/ Winter 2017-18 season and retailers and brands are getting ready with their new collections, Priya Sachdeva, Business Director- South Asia, WGSN, offered some insights on the season's key trends in colours, fabrics, key silhouette and finishes. Sachdeva says, "This buyers' brief forecasting by WGSN is done much closer to the season based not only on the forecasting which the company had done about 18 months in advance, but also includes observations from recent fashion shows and what the bloggers, trend spotters and media is talking about. So, it's a recap of the season."

COLOURS:

The key colours that are going to be important this season are black and blue for Autumn/ Winter and multi-colours which is a return because it talks about prints which are going to be important for the season. There are also neutrals and pinks which will still be key. Major colours of the season are baked pink and terracotta, baked pink (for men),

Jewel tones, wine tones, wine red (for men), deep red, fire orange (for men), acid shades, spiced yellows, inky blues, intense blue (for men), earthed greens, army greens (for men), and metallic colours.

WGSN

KEY ITEMS:

Product and category wise the key items trending for the pre-fall 2017 are:

DRESSES:

Dresses remain dominant as the biggest category for apparel followed by trousers. This is a clear message that there's a shift towards dresses. Also, sweaters have registered a big increase from the last year. This is the global data based on catwalks. In this category, specifically within this pre fall collection, lengths are going to be really important. Midi, mid calf lengths paired with long maxi are the most relevant lengths for pre fall 2017. Also on the list are soft midi, ladylike Tea dresses, and fit & flare dresses.

SKIRTS:

In skirts, asymmetric, vinyl, A-line patterns and pencil styles will be prevalent. Research predicts that soft asymmetric skirts, vinyl skirts and opulent pencil skirts will be in trend.

TROUSERS:

Taking a look at trousers, there will be a much varied selection of styles coming through as customers are becoming more receptive and experimental with the trouser silhouettes. Cropped lengths are dominating and the straight legged are the newest shape. But an interesting shape that is coming up is the cuffed trouser, which is not sporty as it should be but is more formal and is coming into regular wear category. Trouser types in trend are straight trousers, cuffed trousers, pleated trousers (for men), and leisure suits.



—Priya Sachdeva,
Business Director- South Asia, WGSN

SWEATERS:

Apart from dresses, skirts and trousers, sweaters will be a key item for the season. Few important trends in this category are frilled knit wear, volume sleeve sweater, cut & sew roll-neck, technical sweatshirts (for men) with bonded jersey and neoprene.

JACKETS:

Coming to jackets, finally the blue zone in the biker jacket is moving out and they are making way for newer silhouettes. The most notable trend story is the military jacket from casual shapes to dressy band stand jackets. The blazer is the lead silhouette with oversized proportions as an important feature. Some of the key trends in this category are, oversized blazer, military jacket, contemporary military coat, oversized lapels coat, satin duster, knitted tee, sportif anorak (for men).

FABRIC AND DETAIL:

The fabrics and details in apparel which are important and are trendy for the season are lush velvet, vinyl, ladylike lace, casual brocade, flat wool, flat wool (for men), satin, sweet sequins, and plisse. In details, poppers, outsized detail, statement pocket (for men), tape ties, dynamic taping (for men), ruffles & folds and split and drop sleeves are slated to trend.

PRINTS AND PATTERNS:

It is a strong season for print and return of the lady like dressing. The major prints that are going to be prevalent are large florals, stripes, plaids/ checks and bitsy. While bitsy florals have grown more than just floral prints. From stripes followed as bold bands, the next trend will be of reduced slim lines or stripes. Forecasted trends for prints and patterns include sartorial checks (for men & women), faded checks (for men), winter prairie, bar code, fine stripes (for men), miniature repeats, retro geos (for men), new skins and hyper florals.

Also, band tees are enjoying good commercial success, replacing classic band imagery for non-music related motive, including animal and brand logos. Bold colours and 1980s aesthetic run throughout. Pair it up with dressier pieces to counter balance the casual, rock inspired nature of the item.

ACCESSORIES:

There is a lot going on in the accessories segment which include jewellery, earrings, chokers, while its hard to see key items in bags category. Some of the key trends in this category are as minimal maximalism, shoulder skimming earrings, necklaces, ring sets, floating ring, hoops, statement shoulder bags, top handle handbags, party wear shawls, and patterned neckerchief

FOOTWEAR:

Few important trends to look out for in the footwear category are decorative mules, sock-fit boots, loafer boots, kitten heels, mary jane, multi-buckle shoes, high vamp pumps, pearls, piercing and charmed/jewel encrusted.w



DIGITAL OR DIE: GOING BEYOND INFLUENCE AND E-COMMERCE

HOW TECHNOLOGY RESHAPES BUSINESS



L to R: **Namit Puri**, Senior Partner and Director, BCG, **Kavindra Mishra**, MD & CEO, Pepe Jeans London

BY GURBIR SINGH GULATI WITH
RASHIKA GUPTA, PEARL ACADEMY

The fashion industry in India has prodigiously been buttressed by digital media. Namit Puri's opening research presentation highlighted the buying behaviour of consumers over time with statistics of digital fashion. The research showed that online buying has gathered unprecedented momentum, with the percentage of online buyers increasing from 1 percent in 2013 to 16 percent in 2016; this is further expected to reach a staggering 33 percent by 2020. This means that around one-third of the people are buying fashion products through online channel.

The research accentuated that about one fifth of all purchases today are influenced by the online medium. It is expected that in next 4 years it is going to be half of all urban consumption. Considering these facts, about 30 billion of fashion spend is going to be digitally influenced in the next 4 years and for the branded fashion market, this is expected to be as high as 60-70 percent as compared to 40 percent today.

Further the research results indicated that, roughly, a quarter of apparel transactions are purely online, indicating a remarkable adaption of Indian consumers to the growing digital wave. The modern digital consumer follows multiple pathways: some research online and then purchase offline whereas some consumers prefer the opposite way. Few others either purchase completely offline or completely online.

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IMAGES
BUSINESS OF FASHION

Thus, depending on the merchandise offered by the brand, it is very crucial to select an appropriate pathway, the priorities of which tend to vary from brand to brand.

Addressing the e-commerce buzz in which price being the primary driver of purchase, Namit Puri shared insights gathered through the research. Looking at the urban Indian consumers, discounting plays a very important role. Tracking a consumer over period of time helps in better understanding of changing consumer behavior. Convenience will become paramount in the coming years. Today the e-commerce fashion market is estimated to be 3-4 billion in India and is expected to triple in the next 4 years.

The panel discussion following Puri's insightful presentation explored the opportunities seen in digital, whether it's about e-commerce, digital influence



“In order to succeed, today's retailers have to offer a seamless shopping experience across all channels and should not lose track of their customers.”

–Rajesh Jain,
MD & CEO, Lacoste

or using digital to increase the effectiveness of business.

IMPORTANCE OF TECHNOLOGY BEYOND E-COMMERCE

Modern technology is constantly evolving and reshaping the retail landscape, with a conscious move towards e-commerce. With new technologies being introduced into retail stores and an increasing smart phones and apps culture, retail is undergoing a massive tech transformation.

To understand more about the consumer, it is crucial to understand the importance and implication of technology in fashion. Not only at the consumer front, but also at the initial brand level, technology helps to decide which styles, colours, trends, etc., are working well in India, what is working for the competitors, what trends are followed globally, etc. By using technology, the brands can gather great amount of data which helps in promoting better buying at full price. This can result in lower discount percentage and helps the brand to grow.

“Fashion is no more just an art. It is a combination of art and technology;”

said Kavindra Mishra, MD & CEO, Pepe Jeans London. Kavindra described the unique patented technology which Pepe Jeans uses, a laser machine that can customize denim called ‘Custom Studio’. Across the country, there are 5 Pepe flagship stores which are using this technology that allows customers to customise their denim to the fullest. This acts as a powerful tool for Pepe to connect with their customers at a time when customization and individuality has become one of the biggest consumer trends. Pepe sells across the country and tends to give power to the customer to cast their own pair of denim; they can tattoo it, write their name or do anything they like. The brand might explore to bring the entire custom studio online.

Thus, apart for e-commerce, there are various ways in which the brands can use technology to drive innovation, customization, profitability and more integrated consumer experience.

ONLINE AND OFFLINE INTEGRATION

Digital has given much mileage to retail in particular. A large percentage of people who buy online, buy because

KEY TAKEAWAYS FROM THE RESEARCH

How is the operating model evolving?

In the past, the product played an important role. It was bought into the market, sold to the customers and if not meeting the sales demands it was discounted. This model has evolved with time. Today, most companies have moved to their store format which can optimize the product at the store level. Going further, this model has evolved to understanding the consumer preferences on what he likes about the brand and the creation of the product with his likes.

How digital helps in increasing health of business?

The importance of using advanced analytics across the value chain can ensure success of the new operating model.

Markdown and promotion management has moved from experience and management judgment to data and fact based decision. Real time forecasting, targeted campaigns and optimizing gross margins is the way out. Personalized communications makes the consumer more connected to the brand.



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“The footfalls to the store have actually increased because of the online integration. People now have the knowledge about the product, they know what they are looking for and for a better experience they visit the store.”

–Vijay Jain,
CEO & Founder, Orra Fine Jewellery



“The biggest advantage of the digital channel is that brands are not restricted to stores. They can tap into small cities and reach out to consumers who are aware of the brand and sell them online.”

–Munish Baldev,
CEO, Bestech Group

of the price differential. Especially in a price sensitive market like India, it can't be said if people will still continue to buy online if brands remove this price differential. Speaking of discounts and offers, offline stores have an upper hand in the kind of experience and ambience that customers get as compared to the online platform.

Digital has been an extremely useful tool for fashion retail in analysing consumer data. E-commerce has proven itself to be an efficient channel of distribution and can take both offline and online store forward with seamless connectivity in the inventory.

Discovery of products or brands is now an online phenomenon. More people walk into store because of digital influence. As Vijay Jain, CEO & Founder, Orra Fine Jewellery describes, “Mass customization is the biggest trend, from the consumer point of view, in the coming years.” He further comments that, “The footfalls to the store have actually increased because of the online integration. People now have the knowledge about the product, they know what they are looking for and for a better experience they visit the store.”

Further adding to this, Munish Baldev, CEO, Bestech Group, said, “The best thing that can happen to brick and mortar stores is the advent of e-commerce. The biggest advantage of this channel is that brands are not restricted to stores. They can tap into small cities and reach out to consumers who are aware of the brand and sell them online.”

Rajesh Jain, MD & CEO, Lacoste, iterating on the importance of employing the digital medium said, “In order to succeed, today's retailers have to offer a seamless shopping experience across all channels and should not lose

track of their customers. Implementing digitization across the board is the solution. Seamless integration across all stores — online and offline is the key to success.”

BARRIERS/CHALLENGES

One of the biggest difficulties today is to convince the buyer that what he thought was an art is now a mixture of art and science. Moreover, certain set of tech savvyness is also required by the decision maker, so that he is able to recognize whether the technology to be used in the brand is mature, is sustainable and useful to the brand.

Brands needs to constantly hire new people who know about the changes in the technology and can use it effectively. Ability to embrace this rapid digital change and how to decide who is providing better solutions to the company is a challenge that retailers have to face. The other challenge is to be able to discover which platform the customer is coming from.

CONCLUSION

It may not be widely recognized as such just yet, but digital technology is probably one of the best things to happen to the retail industry. Digital is happening fast and forcefully, whether brands are ready for it or not. It enables new products and services. It opens up opportunities to create personalized offers and provide bespoke services to many more customers. But the challenge for retailers today lies in dealing with the highly informed and demanding consumers who have a whole world of information available to them. The need to embrace change is uppermost in the minds of retailers. It will become a must for the retailers to adopt these technologies to satisfy and engage their consumers soon.



ABOUT THE LEAD PRESENTER

Namit Puri is a core member of The Boston Consulting Group's Consumer, Global Advantage, and Marketing, Sales & Pricing practices. He has deep experience in consumer goods and retail, especially in fast-moving consumer goods (FMCG), as well as specialty retail and consumer telecom.

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L to R: **Siddharth Jain**, Principal, AT Kearney, **Anuraag Singhal**, Group VM-Creative Lead, Madura Fashion & Lifestyle, **G S Bhati**, MD, Infinitas Technology Solutions, **Kamal Khushlani**, MD, Mufti

HOW A FASHION BRAND CAN GROW FAST IN THE DIGITAL WORLD

BY SHIVAM GAUTOM WITH TANVI KAPOOR, PEARL ACADEMY

“Technology can add tons in enhancing experience and assisting the consumer in making the right choice. Especially, Japan and Korea are leading in terms of in-store experience and are buttressing heavily on innovations like mirrors, virtual assistance, etc. So, what I want to know is what’s holding Indian fashion brands back in this aspect.”

—**Siddharth Jain**,
Principal, AT Kearney,

Increased competition and disruption from e-commerce and a lot of micro-economic challenges have made growing profitably a big challenge for fashion retailers in India. Hence, any intervention from technology that can help in achieving growth is obviously welcome. In line with this, the moderator of the session, Siddharth Jain, Principal, AT Kearney, invited the panelists to talk about ideas or used cases which are specifically implementable in the Indian context and can actually help in achieving growth. “We intend to keep the session example oriented so that you can relate more to it, as a shopper or as an industry specialist. Also, we will talk through the different stages of a consumer journey, starting from engagement before someone becomes your consumer to how to engage the consumer well at the point of purchase. There are myriad options that recent digital developments offer to ameliorate the consumer experience in store, so that you can effectively convert footfalls to sales. We will also talk about how to retain the consumer and increase loyalty,” he added.

Beginning with engaging with the consumer in a time when there is so much clutter in terms of brands and options, Siddharth Jain asked the panelists to set examples to pull them to stores/sites banking on digital marketing ways. Anuraag Singhal, Group VM-Creative Lead, Madura Fashion & Lifestyle, stated that there has been tremendous developments in the field including virtual screens, magic mirrors, etc.,



“There has been tremendous developments in the field including virtual screens, magic mirrors, etc., but the extent to which these inventions will bring success is something that only time can tell.”

—Anuraag Singhal,
Group VM-Creative Lead,
Madura Fashion & Lifestyle,

“I go to someone’s website/app, browse through products and select something. When I go to the store to pick up the product, the app should be technologically enabled to guide me to the exact location or the shelf where the selected product is.”

—G S Bhati,
MD, Infinitas Technology
Solutions.

“As a whole, my word of caution is that the digital world is a new medium which you can use to communicate and sell and nothing really should change here to achieve growth, which will come in the old fashion way.”

—Kamal Khushlani,
MD, Mufti.

but the extent to which these inventions will bring success is something that only time can tell. Adding to the context, G S Bhati, MD, Infinitas Technology Solutions, opined that in this fast paced world, consumers have very little time for shopping. According to him, although everyone is virtually present in the online world, there is a lack of connectivity that still persists. From apps, websites to networking portals like Facebook, everything should be connected via the internet, only then will it help in boosting sales. “E.g, I go to someone’s website/app, browse through products and select something. When I go to the store to pick up the product, the app should be technologically enabled to guide me to the exact location or the shelf where the selected product is. Because, technically, I have already made up my mind before entering the store, and practically it makes it easier for the consumer. Technologies such as these are already in use in the developed countries, but in India, we still have to catch up on these,” he added.

Kamal Khushlani, MD, Mufti, stated that the digital world is a big universe and social media is a very small part of it. The digital world is a medium that can be used a platform to communicate with the consumer and social media is where the consumer is engaged. It is important for brands to choose strategies specific to them. “As a brand, what do we mean to our consumer and what does he want to listen to us? A lot of brands talk about current and relevant topics, but I personally, don’t see that engaging consumers. As a whole, my word of caution is that the digital world is a new medium which you can use to communicate and sell and nothing really should change here to achieve growth, which will come in the old fashion way,” he added. Approving Khushlani’s notion about knowing the target group and creating suitable campaigns, Siddharth Jain cited the example of Van Heusen’s global campaign that targeted their TG, the young working male professions who have just graduated and are earning good. The campaign, run in LinkedIn, called the most successful professional urged LinkedIn users to nominate one

from their network who they believe are fashionable at work. “The amount of response that it generated with people nomination and talking about why he is fashionable was phenomenal. It went down as one of the most successful campaigns in the history of the fashion industry. More importantly, it communicated the value proposition very clearly to the TG,” he added.

Kinjal Shah, Customer Care Associate & CEO, Crossword Bookstores, talked about three things that brought in success for the growing chain. In an attempt to get to the real consumers amidst of the clutter created by SMSes and e-mails, the chain launched an initiative that tracked whether a consumer actually read the SMSes and e-mails sent to them. Consumers who read neither, received computerized calls talking about the offers, promotions and events happening at the stores. “We realised that some customers respond only to SMSes, some only to emails and a few that responded only to calls.





“There are several, cost effective measures that you can do by leveraging technology to build excitement for the brand and engage with you TG and generate sales.”

–Gaurav Agarwal,
Managing Partner, Rider Footwear LLP



“I think you have to do a mix of tactical, brand and use the media in such a way that you optimize cost. There are so many mediums today that you need to choose the best medium to reach to a particular consumer.”

–Kinjal Shah,
Customer Care Associate & CEO, Crossword Bookstores

We witnessed a much better traction, reduced cost and also got to target the right customer and at the right time,” he said. The group also began tagging people on Facebook and the result was much better ROI. “In addition, we ran a highly successful campaign last year that said ‘The Battery Never Dies’. The campaign clearly conveyed the brand’s message of urging consumers to read a physical book and it was a great success. I think you have to do a mix of tactical, brand and use the media in such a way that you optimize cost. There are many media today, so you need to choose the best medium to reach to a particular consumer,” he added.

Roshan Baid, MD, ALCIS Performance Wear, started off by highlighting the convenience and cost effectiveness that digital media offers when it comes to marketing and promotion of a brand. Although not too convinced about sales, he accentuated that digital is the best medium to get to a brand’s TG, tell them about its products and attract them to offline stores. Talking about the digital side of the brand, he addressed, “The latest behavioural shift in the Indian mentality is to stay fit and look good, and at the same time flaunt it. In one of our campaign, we partnered with a group of about 5,000 runners from Delhi and asked them to update pictures of their workout regimes on social media sites. E.g., some one uploaded a picture of the distance clocked by his treadmill. It created inspiration and also competition, which ultimately lead to the campaign’s success,” he added.

“If I don’t see something in a social media platform, I know for sure that it’s not trending,” said Richa Vipin Kalra, Co- Founder Candy Skin. “So everything that’s on these social media platforms influence me, and also people in my bracket. When we come to numbers,

around 33 percent of the users of Facebook, Instagram, etc., are young people and it’s a very big number because everything that we try to sell on the digital platform is targeted towards this audience. So social media really helps brands in exposure like no other medium does.

Gaurav Agarwal, Managing Partner, Rider Footwear LLP, giving examples of how technology and innovation have helped Rider Footwear, talked about how the company sponsored Mood Indigo, the annual cultural festival of IIT Bombay. The idea was to engage with the techsavvy youngsters of today, hence the brand featured booths in the festival where their young TG can come and check out the technology side of the brand’s products along with the customizable options. “It built up great visibility for the brand. So, there are several, cost effective measures that you can do by leveraging technology to build excitement for the brand and engage with you TG and generate sales,” he added.

Globally, retailers have leveraged on technology to enhance in store experience and to great success. Yet, in India, things are yet to catch up in this aspect. Similarly, even in online portals, technology can add tons in enhancing experience and assisting the user in making the right choice. “Japan and Korea are leading in terms of in store experience and are buttressing heavily on innovations like mirrors, virtual assistance, etc. So, what I want to know is what’s holding Indian fashion brands back in this aspect?” Siddharth Jain asked the panelists.

Citing example of Marks & Spencers, GS Bhati highlighted the innovative stores that automatically prompts customers with accessories options once a consumer chooses a garment. “This single-handedly has increased the sales of their accessories by 29 percent,”

he added. A novel concept that ALCIS Performance Wear has come up with is customized cricket jerseys for cricket teams where consumers can order jerseys for the entire team with numbers and names printed according to their requirements.

Approving the move, Kinjal Shah stated that customization is going to be the next big thing in retail. At Crosswords, one of the top challenges faced is the lack of a technique that can aid in customer recognition. This limits the brand from knowing what the customer prefers, the books that he has in his bucket list, or to give him suggestions. "This year one of our key focus areas will be to leverage technology to achieve this. One of the options that we are working on is that once someone walks into a store, the store manager will receive an SMS clearly stating that so and so has walked in and also list his last purchases. This will help us in serving the customer better," he added.



"The latest behavioural shift in the Indian mentality is to stay fit and look good, and at the same time flaunt it."

—Roshan Baid,
MD, ALCIS Performance Wear



"Around 33 percent of the users of Facebook, Instagram, etc., are young people and it's a very big number because everything that we try to sell on the digital platform is targeted towards this audience."

—Richa Vipin Kalra,
Co-Founder Candy Skin

Most fashion brands in the country have taken the omni-channel route and one of the major challenges that they face is inventory issues. This is because most large brands with 1,000 plus points of sale don't have a single view of their inventory which makes them unable to cross use SKUs. Gaurav Agarwal, talked of issues arising out of size and added that a properly trained staff is the sole solution for it. Citing the innovations implemented in Babyshop, GS Bhati maintained that it is quite possible to tackle inventory issues even without maintaining big inventories in each and every store.

Highlighting the challenges faced by the digital market players, Richa Vipin Kalra talked about how in spite of offering convenience in brand visibility and exposure, the look and feel factor is absent in digital, which in turn is an obstacle in conversion to sales. "So what we started in Candyskin was an appointment booking where we had an interactive quiz on the website. After the quiz is over, if the algorithms didn't match, it tells you to book and an appointment and come to the fitting rooms. In 60 days, we had about 150

women coming in for booking and appointment," she added.

Talking about data analysing, Kinjal Shah expounded over Crossword's loyalty program which is about 17 years old and boasts of 6.5 lakh members. "So actually, we analyse the top 200 customers of each store, noting how many of these customers come in the subsequent years. We actually saw that the data was worrying as the number of these customers that keep coming to the store kept decreasing. We didn't have a solution for that until we launched a premium loyalty program called Crossword Black, where a consumer pays ₹1,499 for a year in return for a string of benefits like 20 percent year round discount, invites to events and special service at stores. In just a year, we enrolled more than 25,000 consumers, earning about 3.5 crores of marketing income to start with. Also, we noticed that these customers shopped double of what they used to do earlier. This program was based on data analytics so you get an idea of how crucial analysis is. For us, 5 percent of our business comes from pure analytics," he said. He also talked of Crossword's new credit card tie up with RBL that features a flat 30 percent discount on stores all across India and the new author oriented program called *The Right Place*.

Data crunching is probably one of the biggest tools for the retail world and all companies are doing it in some form or the other. Without data crunching even the benefits of omni-channel couldn't be reaped to its full potential. It also helps brands plan the inventory in different formats. Anuraag Singhal pointed out that along with these in store technical advancements, it is also crucial to train and upgrade the employees to a digital level. Equipping with various modern equipment like ipads and tabs will also go a long way to enhance in store consumer experience.





CX (CUSTOMER EXPERIENCE) FORUM: EXPERIENTIAL FASHION BEYOND THE PRODUCT

BY TANYA KRISHNA AND PRATIKSHA JONDHALE, PEARL ACADEMY

Today, customer experience is what distinguishes a retailer or brand and is the foremost demand of every consumer. And seamlessly blending technology, lifestyle and service to meet consumer demand is a critical strategy for successful retailers. “Customer experience is the outcome of the interaction of the brand with the customer before, during and after the purchase. It’s not about just the touch points that a customer is engaging with, but more about understanding the end to end journey of the customer,” said the lead presenter of the session Vikram Idnani, Head-IT, Trent, also advising the retailers to look at the entire journey and not just the touch points, while always looking at service propositions for someone.

Idnani talked about the three important aspects crucial for retailers when serving the customer – product innovation, service innovation and innovative engagement; and also about how technology is playing a role in improving or addressing these three areas and what companies need to do to address them.

Product Innovation: On the product innovation side, wearable technology is starting to play an important role now. Ecosystems built around wearable tech



L to R: **Vikram Idnani**, Head IT, Trent; **Vishakha Singh**, Founder, RedPolka.com; **Nathasha Kumar**, Founder & Creative Director, Vajor.com; **Kunal Mehta**, Head- IT, Lifestyle Business, Raymond; **Vishal Kapil**, Director IT, Adidas Group; **Bhavik Jhaveri**, CEO and Founder, Pretr; **Preeta Sukhtankar**, Founder, The Label Life.com; **Rakesh Mishra**, VP and Head of Digital and Marketing, Target

create a holistic customer experience. Another technology which is coming into play and is showing some promise is 3D printing.

Service Innovation: On the service innovation side, retailers are interacting with people on the one to one basis. They are moving into much more dynamic state of information given by the service providers to them. For example, if you go online, there are some companies which are using artificial intelligence and chat bots which help in ways like, to recommend, discover options, complete the purchase and apply promotions. On the service

side, another phenomenon is omni-channel retail. It's basically about "Buy anywhere, Return anywhere".

Innovative Engagement: On the social media sites, a lot of brands are focusing on communities, trying to zero in on those communities and be able to influence them overall and then start to generate revenue out of them in various forms like contests, hashtags, selfies, etc, but they are going a little beyond that now as Facebook and Instagram has launched their stores.

Idnani concluded his presentation with some questions to the panelists:

- > Are we looking at the journey or the touch point?
- > Is our starting point the customer?
- > How do we select tech to improve the experience?
- > Are we leveraging product, service and engagement together?

The moderator, Vishal Kapil, Director IT, Adidas Group, kick started the panel discussion part by saying, "Endorsement of a brand's product by a celebrity on social media helps the brand immensely, but it also puts lot of pressure on the supply chain and more so if the stock is not enough." He also talked about how people are leveraging communities and pointed that Adidas spends a lot of effort in creating communities. "On cricket (Indian) itself, we have a community with more than 3 million plus followers globally, so it's huge. When we talk about tribe, Royal Enfield has created some business model; they have started some bikers' group similar to the ones you have in US. Over a period of time, they found that there is a big opportunity for them to sell the merchandise and now it's a profitable business for them."

Kapil then turned to Vishakha Singh, Founder, RedPolka.com, to share

insights on how she created a curated marketplace like RedPolka and how is it evolving in India. Singh said, "Social media in itself is creating a place where anybody and everybody is a marketer. Community only brings people together and these communities could be about following a design or following a cause or to be part of a cause or just to complain. And that is where one sees an opportunity. What we, at RedPolka, do is identify certain design sensibilities which a lot of women have in a particular community, which is workplace and this is the core of what we are doing. And it all laced through several content and story telling and design led which is all based on the interests of the shoppers and community plays a huge role in building it up and making accessibility for great designs.

Adding to this, Nathasha Kumar, Founder & Creative Director, Vajor.com, said, "At Vajor, we are focusing a lot on tribe and community building. I think gone are the days where the brands used to target masses at one point of time. Today, it's a lot easier to target communities and tribe. Being a private label, at Vajor, we are targeting tribes and a lot of different communities. You, as a marketer or as a head, won't be able to communicate, for example, with a group of mothers but someone from your team can do that. Our team's full-time job is to work in the office and their part-time job is to find out ways to connect with the communities and we have been connecting to different communities and it has worked wonders for us."

Before moving forward, Kapil talked about how the brands look at communities and tribes. He said, "The tribes are more active as compared to communities, which is passive and share information. There is a section of people who create a tribe and they talk a lot about the product and they talk not only about the brand's product which

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has created that tribe but the whole set of ecosystem. From the community, sometimes comes out a tribe and there are a lot of brands who are now creating Whatsapp groups of trail running, mountain hiking, or niche categories which was not existing earlier.”

Taking the session further, Preeta Sukhtankar, Founder, TheLabelLife.com, talked about her brand which is styled by Bipasha Basu, Malaika Arora and Sussanne Khan. She said, “What The Label Life is trying to do is - creating a sort of editorial e-commerce space. We have a team of 50 members, almost all women who work in the office and another 15 male members work in the warehouse. Interestingly, nobody from the office is from a retail background. We have these three ladies who do not work as brand endorsers. We don't believe that fans are consumers. We do not spend much on acquiring our customer. Since most of our members are from editorial background, our shoots are really styled, and our content and campaigns are really planned. So, its almost like an inclusive community. We try and treat every product as a story, that is, it has a beginning, a middle and an end.”

Next, Kapil turned to Kunal Mehta, Head- IT, Lifestyle Business, Raymond, to understand how Raymond has changed over a period of time in more meaningful ways, from occasion led to office to casual and so many different things. To this, Mehta apprised, “Raymond ads from three years back used to have a typical guy with his mother, wife and children and he is trying to fill an entire space. And if one looks at the Raymond ads now, they are completely different, they are much more modern. The more difficult part for us is that there are multiple brands which fall under Raymond. What the company started doing is coming out with ads and understanding



– Sandeep Mistry,
IT Head, Aditya Birla Fashion & Retail-
Pantaloons

the customers in a different way. We have been trying to understand the customer on the social media and trying to understand what his journey is. We have got a cross format loyalty programme where we try to understand the customer buying habits more closely as we go ahead.” Asked how Target, a US based retailer, is reaching out to its customers, Rakesh Mishra, VP and Head of Digital and Marketing, Target, agreed that at the end of the day, a retailer has to think about his consumers and what he/she has to offer to them. “As I think about tribes, communities, how we are leveraging social media, its actually very similar to the end to end journey of customer experience that we talk about. I think one should talk about engaging with the consumers holistically. When one engages with tribes and communities to develop a range of products, they should talk all the way through. Don't think of only using them for a particular activity but build an authentic connection with those people, in order to gravitate the consumers towards that. Retailers need to establish that they are here for a long haul and as a true connector of sorts and that they are here to serve the customers or guests, as Target calls them.”

Taking the session forward, Bhavik Jhaveri, CEO and Founder, Pretr talked about the basic difference between the user experience and consumer

experience. He said that CX is about how well one knows his/ her consumers through data, and the user experience is more transactional in nature. Jhaveri maintained, “How technology will evolve as giving experiences to the consumer will depend on how good are we in capturing the data at various touch points and then create experiences which are improving the overall shopping journey, the overall manufacturing journey, the overall speed to market, etc.”

The key to consumer experience and then evolving experience is using various connected technologies and devices and working on the infrastructure to make connected data points which improves our ability to understand our consumers better and then give them experiences. Sandeep Mistry, IT Head, Aditya Birla Fashion & Retail- Pantaloons, also talked about how Pantaloons maintains a strong loyal customer base by working closely with their customers and many communities.

Further, talking about another aspect of consumer, that is, fast skimming behaviour and the emergence of fast fashion retail, Singh from RedPolka.com applauded Inditex's annual report which said that the company tries to push two new designs – through design in the same cut or design in something else - within a week across several of their stores, because they are listening to the customer. She maintained, “Its not about how fast the consumer is changing and what should we do; its basically about how fast we are moving in a direction and about listening.

Concluding the session, Idnani also added, “Westside is launching new lines every Friday. And once you set that goal for yourself, then whether its 100 stores or 120 stores, new lines have to hit every store on a Friday. In order to scale and respond quickly to our sales, we in fact changed our ordering process.”



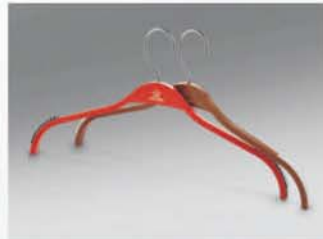


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INDIA- THE PROMISED LAND FOR FOREIGN BRANDS

INDIA OPPORTUNITY FOR INTERNATIONAL FASHION & LIFESTYLE BRANDS

BY GURBIR SINGH GULATI WITH RASHIKA GUPTA, PEARL ACADEMY



—Devangshu Dutta,
Chief Executive, Third Eyesight

With its vast consumer base India has emerged as a land of opportunities for numerous big global brands. It's been almost two decades since the Indian government opened up the economy to foreign direct investors. And since then, there has been a continuous flow of international fashion brands coming into the country. Post 2005, the flow picked up with over 20 global fashion brands making in-roads into India. In the year 2010 post-recession, many international brands bounced back and started venturing into the Indian market.

During the last few years, India has seen a steady inflow of new international brands, including many global leaders. A few have also broken all speed records to cross the USD 100 million sales mark.

As the integration of the Indian consumer with global trends continues coupled with favourable retail environment and government policies, international fashion brands and service providers find the country an increasingly fruitful ground for growth.

The session discussed the success formulas of global brands and retailers, their learnings, strategy shifts and issues yet to be cracked to get the best out of the emerging opportunities.

DECODING THE JOURNEY

Sharing about his 8 years journey, Vineet Gautam, CEO & Country Head, Bestseller India, said that the company was launched with multiple brands in the country. Bestseller has 20 brands in its portfolio across the world. In India, they have 3 brands and are planning to launch 3 more now. Growing from 0 to 1,000+ point of sales (POS) in the country, Bestseller does 15 percent of its business online.

He felt that a big part of expansion of a brand depends on how much can it source in India. But with high duty structures, it is nearly impossible to make business profitable. India looks like a very attractive market but sales productivity per square meter is the lowest compared to other countries. Manpower is cheap in India but the real estate cost is much higher from the productivity point of view. Sourcing and product relevance are very important to a brand. To be more visible you have to adopt new marketing techniques and also hire new talent which can help the brand to grow faster. A lot of the products are localized; looking at what the consumer wants. Around 50 percent of the merchandize is designed in India and 68 percent is made in India. Pricing strategy has to be sharp and the correct positioning of the brand is very important.



“Bestseller has not seen any footfall de-growth because of e-commerce. They have actually seen a 15-18 percent increase in business.”

–Vineet Gautam,
CEO & Country Head, Bestseller India



“The rupee is the most depreciated in the world and we are the worst in PPP index. This encourages Indians to buy fashion abroad from the same brands rather than buying them here.”

–Shailesh Chaturvedi,
MD & CEO, Tommy Hilfiger Apparels India



“Discounting is one of the disadvantages of e-commerce and a challenge to any brand.”

–Rajesh Jain,
Managing Director & CEO, Lacoste

Lacoste was one of the few international brands, especially in the premium category to enter India in 1993. Rajesh Jain, Managing Director & CEO felt overwhelmed by the journey of over 23 years in India. Sharing his experience, he says that when Lacoste entered India in 1993, it was perceived as a polo centric brand and considered very expensive. Back in the day, the price points started from ₹800, which was considered a luxury.

But over the period of time, the disposable income of the people increased. They became more brand conscious and exposure to international travel and media led to further growth of the international brands' market in India. With this, more retail developers also started coming up who pushed the brands to reach out to customers in different markets and helped the brands expand rapidly.

Oliver Kaye, India CEO, Gap said, “I have seen a significant change in the Indian retail market from the time we

first launched Calvin Klein to now with Gap.” Further adding to the growth of the brand in India, Kaye shared that, “The loyalty program is generating a lot of business for the brand and Gap Kids is doing phenomenal and accounts for 36 percent of the total business which the brand never expected.”

Kaye also said, “Localization is an important factor if an international brand wants to succeed in India. Having your own designs to make it relevant to the customer is crucial. For example, Gap India will add a lot more colour to its India designs.”

Gap's India operations have become the first franchisee globally to be allowed to do their own designs and Kaye projects that by the end of 2017, 50 percent of what they sell here will be designed and manufactured in India.

E-COMMERCE, DISCOUNTING AND THE INTERNATIONAL RETAIL

Shailesh Chaturvedi, MD & CEO,
Tommy Hilfiger Apparels India

opposed the discounting system in e-commerce and he said, “If you see the journey of e-commerce in India, it started with discounting. Tommy Hilfiger didn't agree to this approach as we do not agree on selling our products on discount even if it is for clearing the old stock. Our model is very clear; the discounting happens at our offline stores which may be the same online so that the consumer has a seamless experience of the brand.”

Adding on this, Rakesh Mishra, VP and Head of Marketing, Target, shared his opinion as he said, “Customer acquisition is what bribes discounting.” Rajesh Jain, Managing Director & CEO, Lacoste also agreed as he said, “Discounting is one of the disadvantages of e-commerce and a challenge to any brand.” Vineet Gautam, CEO & Country Head, Bestseller India strongly supported the importance of e-commerce as he quoted, “It depends on how the brands use e-commerce as a channel to expand their business. Bestseller has not seen any footfall

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“Localization is an important factor if an international brand wants to succeed in India. Having your own designs to make it relevant to the customer is crucial.”

—**Oliver Kaye,**
India CEO, Gap



“Customer acquisition is what bribes discounting.”

—**Rakesh Mishra,**
VP and Head of Marketing, Target

de-growth because of e-commerce. They have actually seen a 15-18 percent increase in business.”

IS INDIA REALLY A PROMISED LAND?

India has been considered as a promising land for international fashion and lifestyle brands. The promising factor only remains limited to where the marketers are still trying to work around challenges and problems that still plague the retail landscape. It is still evolving and there is hope and expectation in the near future.

With the first wave of international brands in India in 2003, our GDP had grown at a rate close to 10 percent from 2003-2008.

Most of the international players in India are not selling at a price which they sell globally. The market is not mature as compared to any other market in the world. Nevertheless there are many complexities in the Indian economy to still reach and match up to the international market. There's a long way to go.

CHALLENGES

Shailesh Chaturvedi, MD & CEO, Tommy Hilfiger Apparels India singled out the difficulties in finding retail manpower, the high import duties and the depreciating Indian rupee as the key challenges that global fashion brands will face in 2017 and beyond. Chaturvedi said, “The Indian rupee is the most depreciated in the world, we are the worst in the purchasing power parity index and this encourages Indians to buy fashion abroad from the same brands rather than buying them here.”

Getting good quality real estate is a nightmare today, says Vineet Gautam. To expand, a brand needs good infrastructure to get more mall spaces.

Other challenges include manpower and cost structures.

For Lacoste, the challenges include, availability of premium retail development at the right cost is one big challenge. Discounting is another. E-commerce is a wonderful channel but the discounting factor is hurting the premium and luxury brands. Lacoste currently is going very well in the country however if the GST turns out to be higher for the retail industry, then the brand will become very expensive for the Indian market.

Another big challenge for Lacoste is to deal with the unauthorized and counterfeit products in the market. The counterfeit products come to India through online, domestic manufacturing and imports. Sadly, the law in this country is not strong to deal with this. However, they are looking into the issue and taking corrective measures.

Vineet Gautam, says that the young customer of India is a tough one. They are not forgiving, very demanding and have no loyalty. Till the time you are relevant and are able to address their lifestyle, they are interested in the brand but the moment you lose the product, consumer doesn't come back. He feels that there should be no delays in terms of trend delivery at the right time. Nevertheless if you are able to give value for money, the customer is there to stay. “Keep your brand aspiration high and be relevant,” he said.

India is fast becoming one of the world's major growth engines; however it still has challenges to overcome, including lack of resources and a complex bureaucracy. However in totality, all agreed that looking at all the big emerging markets, India seems to have the most promising growth potential for international fashion and lifestyle brands.

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SUCCESS STORIES OF COLLABORATIONS

BY TANYA KRISHNA WITH PRATIKSHA JONDALE, PEARL ACADEMY

The much awaited session about the success stories of collaborations between malls and retailers, focused on key points like ways of driving customers during weaker days, creating new reasons/seasons to shop in the malls, enhancing omni-channel experience for customers and ways to add to the brick and mortar experience. The presenters included teams of malls and retailers with whom they have had their best collaboration.

The first duo to give a presentation on their collaboration and success story were Ishita Yashvi and Vishal Anand. The duo played an audio visual presentation where representatives from DLF Mall of India and Calvin Klein talked about how the two have found compatible partners in each other. Yashvi maintained, “DLF Mall of India offers a very unique proposition. It’s India’s first and only destination mall and has the power to pull people from far and wide. Our endeavour is always towards enhancing customer experience. One of the most critical part of our planning is to plan in line with our tenants. Our planning is useless unless we align what their objectives and their business goals are. And that’s where not only the marketing but even the operations team work very closely with each brand to ensure that the right TG is walking into the store and higher conversions are taking place.” Vishal Anand of Calvin Klein also agreed that Mall of India has been very instrumental in driving the footfall, catering to the target customers and it has helped them in a very aggressive way. Yashvi concluded saying, “Its overwhelming to see CK breaking many records with DLF Mall of India and we are in a happy space right now.”



Vishal Anand, Sales BD & Projects Head, Calvin Klein and **Ishita Yashvi**, Head Marketing, DLF Mall of India

The teams of presenters included:

Ishita Yashvi, Head Marketing, DLF Mall of India
Vishal Anand, Sales BD & Projects Head, Calvin Klein

Muhammad Ali, COO, Prestige Group
Manohar Chatlani, CEO & MD, Soch

Amit Jhinghan, Manager Leasing, Gardens Galleria
Manoj Jain, Head Marketing, Hypercity

Gaurav Balani, Head Marketing, Infinity Mall
Sumit Suneja, Head BD, Bestseller



Amit Jhinghan, Manager Leasing, Gardens Galleria and **Manoj Jain**, Head Marketing, Hypercity

The second group on stage was the duo of Amit Jhinghan, Manager Leasing, Gardens Galleria, and Manoj Jain, Head Marketing, Hypercity. Jhinghan started his presentation and talked about Hypercity, which is an anchor tenant of Gardens Galleria and have occupied 50,000 sq.ft. area of the lower ground floor for 10 years now. Hypercity is a supermarket chain, from the K Raheja Group— a real estate leader, and Shoppers Stop and Crossword are its sister concerns. Continuing to talk about the collaboration with the mall in Noida, Jain said that Hypercity has the highest loyalty base in its store at Garden Galleria in Noida and also that its extremely important for them to drive loyalty, being situated at such a strategic location of Noida. The duo maintained that Hypercity has risen from where they started, and have doubled their sales. Hypercity has not only driven customers to a new property like Gardens Galleria but has also achieved numbers which are productively growing. Hypercity also boasted of doing various activities in collaboration with the mall, like RJ activities, joint promotions, etc., which the retail brand considers “extremely important to drive footfalls”. Apart from these, initiatives like Budding Chef, which is a platform where customers can come and sell their products, and other seasonal celebrations take place on a regular basis, in order to bring in more customers to the mall.



Muhammad Ali, COO, Prestige Group and
Manohar Chatlani, CEO & MD, Soch

The third team on the dais to share their stories included Muhammad Ali, COO, Prestige Group and Manohar Chatlani, CEO & MD, Soch. Prestige Group owns the brand Forum and have 6 malls in South India. The duo thanked the IMAGES Group for having them there and giving an opportunity to share their 'emotional story' of collaboration. Prestige Group has to its credit creating many brands who have now become huge national brands, and the list includes Soch and Forum itself. Ali said, "In 2004, the retail scenario in Bengaluru was a division into

two markets – one was the commercial street for ethnic wear and other was Brigade Road for western wear. That was the time when we opened the Forum Mall despite people telling us that it was a huge mistake. Unfortunately, we couldn't bring any women's ethnic wear brand to the mall. An opportunity came where one of our store was not doing well on the first floor. Manohar Chatlani was family friends with Prestige and when we asked if he could bring in a brand there, he bought the store with the stocks and whatever was left there and in 2-3 days of time, Chatlani created a brand called Soch." He maintained that no changes were made to the store and only the board and furniture were removed and the first Soch store was opened overnight by just putting up a black board that read 'Soch'. The new store rose the space turnover of ₹3 lakhs to ₹20 lakhs in the first month and that was phenomenal. And then, Soch went on to become a national brand. Furthermore, Chatlani said, "When we opened this store at Forum Mall, there was only one condition on us. They asked us to not call it a 'Favourite Shop' as they did not want a multi brand outlet. This was the biggest favour they did to us. My wife's name is Shobha Chatlani and hence the name 'Soch'. Our first store opened in 2005, second in 2008, third in 2009 and today, we have 87 EBOs and we are in 20 SISs. I think we owe a lot to Irfan Razack and Prestige Group, who had this vision."



Gaurav Balani, Head Marketing, Infinity Mall and
Sumit Suneja, Head BD, Bestseller

The final presentation was from Gaurav Balani, Head Marketing, Infinity Mall and Sumit Suneja, Head BD, Bestseller. Suneja started the presentation talking about the '7 years of partnership, with 5 stores in 2 malls of Infinity'. He said, "Bestseller and Infinity Mall have always worked together to come up with new business strategies which benefit the consumer in the end. We have always sat down together and brainstormed with the mall team on how we can better our endeavour to market the product and brand to the consumer every time. All these initiative which we have taken so far with Infinity has shown results. We have three brands in the mall— Jack & Jones occupies 39 percent space and contributes to 36 percent in sales, Vero Moda occupies 45 percent space and contributes to 38 percent sales and Only covers 17 percent space and brings in 26 percent sales." Balani pointed, "Consumers mostly connect Bestseller with Infinity Mall and come again and again for these brands' lines, which gives benefit to the mall as well." Suneja also added that the mall gives complete brand solutions to its retailers/brands completely free of cost, inspite of not being into revenue sharing.

The presentations by the malls and retailers teams were judged by a jury which included dignitaries like, Bijou Kurien, Board Member, L Catterton Asia; Thomas Varghese, Business Head, Aditya Birla Group (Textiles); and Pankaj Jaju, Founder & CEO, Metta Capital Advisors LLP. The results was later announced during the Images Fashion Awards event.



L to R: **Pankaj Renjhen**, MD - Retail Services, JLL India; **Mahim Singh**, Centre Head, The Great India Palace; **Abhishek Bansal**, ED, Pacific Group; **Sanjeev Rao**, Director- Business Development, Raymond; **Pallav Atreja**, BH & EBO - E-commerce, MAS Brands (Amante)

PANEL DISCUSSION:

The presentations on success stories was followed by a panel discussion, which was moderated by BS Nagesh, Founder, TRRAIN, and Pankaj Renjhen, MD - Retail Services, JLL India.

Renjhen maintained that with changing times, the relationships between malls and retailers too have changed, in that, they are both now talking more about partnerships. "Brands like Soch created out of a mall or other such stories of collaboration really bring a positive feeling in the space," he said. Next, Nagesh asked retailers and mall owners from the audience about their stories of collaboration or a story where a mall and brand did something fantastic for the customer or for each other.

To this, Abhishek Bansal, ED, Pacific Group, shared his story where Decathlon store did wonders with the Group's help and initiative. Pallav Atreja, BH & EBO - E commerce, MAS Brands (Amante) shared a story about one of

their biggest store spanning 1,600 sq.ft, that they had opened in Elante Mall in Chandigarh. "It was a bold decision on our part to open such a huge lingerie store in Chandigarh, as well as for the mall who supported us in reaching out to the right customers, market the store really well when we took off. There was a lot of collaborative effort from the brand as well as the mall. This story has given us the confidence that our kind of category also has a market in tier -II and -III cities where there are a lot of buyers but they do not have access to these experience zones," he said.

Moving on, Sanjeev Rao, Director- Business Development, Raymond talked about how Raymond organizes huge events on regional festivals by putting big hoardings, decorations, etc. He maintained, "In the last couple of years, brand developers have also realized that until and unless the retailers are not successful, are not doing what you are meant to do, it doesn't makes sense for the malls also. So, they have started collaborating and these collaborations are highly successful for us."

On this note, Mahim Singh, Centre Head, The Great India Palace, added, "Both malls and retailers have evolved, on many fronts. But one thing that has phenomenally evolved is the relationship between the mall management and the retailer. With changing times, the two parties have found confidence in each other and are more open to discussing things like how to increase the footfalls or other things."

Taranpreet Singh, Head Retail, Kazo, agreed to the thought and cited an example. He said, "Pacific Mall created an



—BS Nagesh,
Founder, TRRAIN

event called 'Women's Wednesday' where the mall collaborated with all the brands and asked them to give something special to the ladies coming to the mall and these does not necessarily have to be discounts; it can be anything beyond discounts too. And all the brands were happy to hear that and the initiative has really worked for us."

On this, Renjhen said, "It's not about earning from each other now. Today, the competition for the mall and even for the retailer is very different because one does not know where the competition will suddenly come up from, it could be from an e-commerce firm or anything. For a mall, 60 percent space is covered by fashion and fashion related, and the ground floor space is always reserved for them. But today, food and beverage companies are taking up that share. So the competition is continuously changing and forcing the mall owner and the retailer to work collectively to be relevant to the market."



—Taranpreet Singh,
Head Retail, Kazo





SOLO EXPRESS PRESENTATIONS

BY VIBRANT FASHION CEOS

Their very own powerful success stories presented by the fashion CEOs themselves were about what made them who they are today! Stories which have changed their lives and changed probably the fortune of their businesses. This was a packed, full house highlight at the IFF 2017.



ANCHOR: Bijou Kurien, Board Member, L Catterton Asia
COACH: Harish Mehta, Speaker COACH Teacher Mentor
Co-Founder DiSRUPPt Thinking



-Manjula Tiwari,
CEO, Future Style
Lab-Cover Story

“Our first store was opened in Central, Gurgaon. Today we are available across 40 doors in one year. For us, it’s just the beginning.”

Manjula Tiwari’s story describes the journey and courage needed to create something extraordinary. For Manjula, it started with the passion of making western wear accessible to Indian women. Designs that would align with their sensibilities and get them what they like. The only quest was to give the Indian women a product which is luxurious, global and yet affordable at the same time. A dream, as she calls it, resulted into a plan after a chance meeting with Rakesh Biyani over coffee. Two days later, after a brief meeting with Kishore Biyani, the plan further graduated into a project and finally resulted in a highly successful business. Thus Cover Story was born, and it soon went on to emerge as one of the fastest growing brands in the Indian women’s wear segment.

It was not a cakewalk for Manjula as she had many doubters who challenged the plan. They were sceptical about an Indian company daring to create global fast fashion trends in western wear. Yet, inspite of all these challengers she was fortunate enough to find a passionate bunch of believers who believed in her idea and who formed her core team. The vision for the brand was shared and they became the custodians of its creation.

It was an overwhelming journey for Manujula, as a whole. “I joined the Future Group and then it was time to get the show on the road. I have been travelling in the bilanes across the world for sourcing fabrics, talking to the customers all over and even to set up a design office in London, all in 90 days. On April 14th 2017, Cover Story completes its first year as a brand. Our first store was opened in Central, Gurgaon. Today we are available across 40 doors in one year. For us, it’s just the beginning,” she concluded.



-Abhishek Ganguly,
MD, Puma

“Remember your failures. They are your moments of truth. They should live within you until your death only to keep you inspiring.”

Abhishek Ganguly started his career by selling annual maintenance contracts for printers. After he did this job he went to IIM Lucknow where he was among the lowest rankers in the entire batch. Neither had he ever been a sports guy nor looked at fitness for the first 20- 22 years of his life.

As Ganguly explains, “Lot of people say that failures are the pillars to success; I feel it’s very glorified. Rather I feel failures stick to you, they remain with you and are the moments of truth. They actually inspire you for redeeming your life in the future.”

He further adds, “When I look back, it gives me a great feeling of inspiration. Irrespective of how great a company you have and how great an idea you have come up with, unless and until you are geared for success, it is not going to go through. Today, I know it is not about a great idea nor it is about PE investments on a business idea which makes it successful. It is how desperate you are for getting that success. And this is the learning which comes from my past.”

When Puma started its operations in India about 10 years back, the first year was full of mistakes and failures. The company thought the best way to succeed is to look around and view the successful businesses and brands in the country to get it right.

Puma was one of the late entrants in the market in 2006, when the Indian market already had leading global brands in the sports and lifestyle category. In the first year, Puma looked closely at the market leaders and inducted human resource talent who had worked for these leaders. It also looked at the trade terms and business norms with the best companies around.

During the short time, Ganguly also shared the responsibility in leading Puma in India. In addition he divulged that he is an avid fitness enthusiast now. “I realised that one cannot lead a sportswear company without relating to the consumer, by being a consumer himself. And today, I enjoy sports and fitness like never before,” he concluded.



Alok Dubey,
CEO, Arvind Lifestyle Brands

“The brand registered a topline increase of 48 X and a bottom line increase of 65 X from the day it started. Today, in just 7 years, the brand clocks a staggering turnover of about ₹750 crores.”

Dubey started US POLO ASSN. some 7 years back. “The brand registered a topline increase of 48 X and a bottom line increase of 65 X from the day it started. Today, in just 7 years, the brand clocks a staggering turnover of about 750 crores,” he said. If Dubey is to be believed, the only thing that aided the brand in morphing to the colossal stand that it enjoys today is belief. “A certain belief, that’s all!” he says.

Expounding on the beliefs that the company pursued, he outlined the first one — “outcome is something but strategy is everything.” That also was true in the case of US Polo where they just followed their key strategy without bothering about the outcome. The second belief that he highlighted was having clarity in one’s ‘value proposition and business model’. It’s a key aspect in any business, as, according to him, there can be no value if in the absence of a perfect business model. “A lot of companies keep on un-boxing the value proposition only and they fail, because they lacked a sound business model,” he added.

The third most important learning as Dubey quotes is ‘working for dreams is something but creating experiences together is everything’. Citing the example of this own team, he shared how the entire team works together to create experiences for the consumers, themselves and for the company. In short, it is extremely important for any business to work together and stress on growing together as a team rather than just aim for profit. These, according to him, are the beliefs that paved US POLO ASSN.’s road to success in India

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-Anant Daga,
MD, TCNS Clothing (W)

“End of the day, it’s for you to decide what works for you. What works for me might not work for you. So think, decide, and focus – that’s the key to success.”

Starting his session, Anant Daga said, “What can stop greater success is success itself.” Normally, confidence and complacency seeps in along with initial success. To avoid this, Daga said, that he follows his own rule book comprising 6 cardinal rules that are listed below:

Selective focus: With initial success comes a feeling of over ambition, but it is crucial to contemplate and focus only on what would be best. “Do not try to dilute your bandwidth beyond a point. The idea is to focus, focus and focus,” he iterated.

Doing better than before: The goal is to discover your best version and try to beat it constantly.

Challenging status quo: It is important to reinvent oneself routinely. The humility and courage to challenge the very assumptions that have ushered in

success is indispensable for positive results. The idea is always to think fresh all the time.

Simplify complexity: The human mind is obsessed with the idea of complicating things and then settling for even more complicated solutions. The idea here is to keep it simple, as according to Daga, simple solutions are the most effective.

Constructive paranoia: This refers to the very essence of the managers to anticipate and set things right before it can go wrong. It’s always a good idea to be alert and be aware.

Will to win: Success should be celebrated always, and one deserves the right to be proud of it, but, there should be no overhang. One should always be careful least success brings in complacency, which might pose as an obstacle for future prosperity.



-Ganesh Subramanian,
Founder & CEO, Stylumia

“I used to be a very good manager but it took me 12 years to realize that I should have my own point of view.”

Fresh out of college, Ganesh Subramanian’s desire was simple – join a reputed company, work hard, earn a good pay and establish a reputed name among his peers. He soon joined an establishment sewing threads from fiber. After this, there was no looking back. He went abroad, kept scaling the hierarchy of professional life. All in all, he enjoyed what could be coined as an ideal and successful life, well, until that one fine day when one of his seniors recommended him a book by the revolutionary retail guru Paco Underhill called *Why We Buy*. This proved to be a turning point of his career. For the first time in his life he challenged assumptions and started to analyse what the book said by pursuing its relevance in the Indian market practically. Turned out that most of the expert assumptions, be it from the book or what he has been accustomed to from his seniors, were not true. “This was the second stage of my career. I lost myself in understanding why people do what they do. I realised that I loved anything that gets me closer to the customer. So I moved from branded industry to retail, from Walmart to Myntra,” he said. Eventually, he was no more dependent on the credibility of the company which he was working. This is where he started thinking of creating something on his own. That’s how Stylumia, an artificial intelligence company began. The company wants to capture reality from the consumer perspective and help brands deliver what they want.

Ganesh Subramanian, defining his journey, said, “I used to be a very good manager but it took me 12 years to realize that I should have my own point of view. Summing it up, one should discover his own crack through which the light can get in, have the courage to be imperfect and don’t just spend your life trying to please your boss. And, be a student always, there’s a lot to learn.”



-Apeksha Patel,
CEO, Deal Jeans and E2O Fashion

“I believe success is celebrating the idiot that we all are. We also must have the humility to acknowledge that we all have a long way to go.”

Apeksha Patel started working at the tender age of 18. During her tenure in Deal Jeans, she has handled various roles, right from designing to marketing, production, sales, accounts, ledger reports, payment follow-ups to even dispatches. Yet, her identity has always been her father’s daughter or her husband’s wife. Naturally, the lack of recognition and appreciation was frustrating and in her pursuit of an identity she left Deal Jeans in 2011 and after a year long break started her own company, E2O fashion, a handbag brand. A few years later she rejoined Deal Jeans as the CEO with new found enthusiasm, motivation and passion that she attributes to her new company.

“Today, I am very happy of that fact that I am acknowledged as the CEO of Deal Jeans and founder of E2O fashion. In my journey, I have learnt that we all make mistakes and it’s very natural. But it’s important to not repeat the mistakes. I believe success is celebrating the idiot that we all are. We also must have the humility to acknowledge that we all have a long way to go,” she concluded.

Apeksha Patel’s oration made it very clear that, acknowledging the efforts and contributions of someone is as crucial for a success story as is acknowledging and learning from mistakes.



-Lalit Agarwal,
CMD, V-MART

“My definition of creativity is creating something original or unusual, something that people aren’t accustomed to.”

Life is not only a journey it is also about the experiences and insights which one picks up on the way. Describing the same Lalit began from his birth in Kolkata in the 1970s where he used to live with his joint family of 20 people in a small flat. His father first started the retail business in 1975 by opening a tailor shop in Kolkata. Then, the family moved to Orissa.

Lalit was a keen observer and learner and he used to visit his father in his work and understand how business is done. His own entrepreneurial journey started from Mumbai where he set up a printing and packaging unit while still pursuing an MBA. Started with a capital of just ₹5 lakh, the business later grew to a turnover of 2 crores. He then moved to Kolkata in 1999 and started Vishal Megamart with his cousin. A few years down the line, he moved out of Vishal Megamart and launched the first V-Mart store in Ahmedabad in 2003. Today, V-Mart is present in 141 stores across 120 cities with almost 1.15 million sq.ft area covering 14 states.

V-Mart targets the basic bottom part of the pyramid. If we look at the Indian socio-economic condition, the middle income group from small tier -II and III cities is the biggest aspirational segment. The company saw a huge value proposition in this segment and is focusing its business energies on the same. The key thought was to bring some retail creativity in an organized set-up. They had a vision, a vision to create value around the whole eco-system around and through proper communication created trust.

“Trust is paramount in any business because it is impossible to create an eco-system without it. For us, we have been successful in rendering superior customer service through the trust that they have in us. Infact, it’s the trust that led to the creation of our retail creativity model and helped us improve retail sales performance,” he added.

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-Manoviraj Khosla,
Designer

“We designed uniforms that looked cool, were functional and at the same time ensured that the one wearing it is happy and comfortable in it.”

Manoviraj Khosla began to study fashion at the time when it was still in its infancy stage in India. Khosla completed his BCom from Kolkata and then went to London to study fashion and came back and set-up his own studio in 1990 in Bengaluru.

The designer started to experiment with different kind of attires and realized that his forte was men’s wear. It was a humble start where he started with a mere investment of ₹30,000 and hired a tailor and a master cutter. They started making shirts and pants and sold it one or two designer stores which had just opened in India. “There was one in Delhi and one in Mumbai, and that’s where my business started growing from,” he added.

Over the years, Khosla experimented more sharply with layering, texturing, weaving, laser cuts, etc. In a rare feat, the designer also set up a line of pret, sporty clothing and shoes with Kingfisher in 1995, although it didn’t take off. Khosla found that it is very important for any establishment, be it a restaurant or a corporate house, to look good. He then ventured into designing uniforms. He has designed for the most renowned names across hotels, restaurants, corporate houses, pubs, etc. He especially came into limelight for his Kingfisher Airlines uniform.



-Vineet Gautam,
CEO & Country Head, Bestseller India

“I think it’s very important for brands to have a dream team. My dream team believes in one thing which is to grow and stand out in the market.”

Vineet is an hotel management pass-out. The positive personality trait which he had was a dare to dream big. He never wanted to settle down for less during the very start of his career and even did not appear for any of the college campus placement interviews.

“We speak about a lot of other stuff but we forget that we are here on this stage today because of the people backing us. I have a backing of 2,800 people behind me,” he said.

When Vineet joined Bestseller 7 years back, the market said that they are soon going to be written off. But with his belief in himself he hired some 2,700 “odd” people. “It is overwhelming to share that out of the 40 people we hired in the first batch, 36 still work for us,” he said. He further explained that the team dared to be different, at a time when others were doing franchisee stores, they wanted to do 100 percent own retail; while others were shutting shops or reducing the

size of their stores, they opted for 200 sq.mt stores.

“We were already 42 crores when we did our first retail meet; and we aimed for ₹1,000 crores, which we achieved by 2016. This was only possible with the sheer belief of the consumers of this country,” he said.

He maintained that it was only possible because of his team, and the fact that they believed in the goal. “We call it the dream team and I think it’s very important for brands to have a dream team. My dream team believes in one thing which is to grow and stand out in the market,” he added.

According to him, the bigger part of their job was not about creating fashion, or sourcing or marketing; it was about convincing the team they all share the same dream — to be India’s most admired fashion retailer.



-Rahul Jashnani,
Managing Director, Jashn

“Every entrepreneur is a super hero. What I have learned from my hero, Iron Man, is that the key ingredient to surviving is sheer will power. Backing off is not an option even when you fall short of resources.”

Rahul's story recounted the learnings he gathered during his journey in Restablishing Jashn. “Every entrepreneur is a super hero. What I have learned from my hero, Iron Man, is that the key ingredient to surviving is sheer will power. Backing off is not an option even when you fall short of resources. Sometimes, we just have to ignore the maths and try to fly high,” he said.

When Rahul relocated to Mumbai, he neither had a house nor an office. But it was the sheer will to create something beautiful and something that makes him happy and has made the company what it is today. Evolution is another key aspect of success. You have to keep getting better constantly. Reinvent and rethink, only than can you stay relevant to your customers. Entrepreneurs should always think strategically prior to and after making a decision.

“Taking a cue from Tony Stark, I always take out time to develop new ideas to the benefit of my brand growth. I also take out time to appreciate the people with who I work with appreciate and motivate them to do much better. Be straight forward with the team, associates and customers and love what you do,” he added.

The brand Jashn expanded from category to category and progressed with its expansion plans to stay viable to its discerning customers. Jashn today is present in across 30 Reliance Trends stores, and 60 exclusive brand outlets across India. The company will be opening their first Jashn pret franchisee model shortly, thereby increasing their franchisee network as well.



-Yashika Punjabee,
Creative Director & Co Founder,
TheLabelLife.com

“Celebrity endorsement is actually lazy marketing. If you think about it, it's such a cookie cutter formula.”

TheLabelLife.com is an online e-commerce brand, curated and styled by Sussanne Khan, Malaika Arora Khan and Bipasha Basu that retails décor and fashion online.

“Celebrity endorsement is actually lazy marketing,” Yashika stated. “If you think about it, it's such a cookie cutter formula where you hire a celebrity, build a contract and you talk about exclusivity of the brand, you ensure page 3 stories, you have them end up at the press conferences, you hope that they will post about your brand at the given point in time, you market and then that's the end of the contract. We believe that's a lazy way of marketing, specially in a country like India teeming with such endorsements,” she added.

According to her, there is so much more that brands can do, in a creative way. What if they aren't actually the showstoppers for your brand but style

editors instead? What if they are not endorsers but partners? What if they help you build the collection, swatches and signature products? What if they do collaborations with you as like-minded individuals? What if they are not exclusive to your brand rather inclusive to your brand? What if they don't design but also style your collection? What if they put up content themselves as promised in the contract, instead of you pestering their managers? What if they don't just cover placements but cover stories? What if they just don't do a campaign for you but actually converse with your customer?

All this is very much possible and this is what TheLabelLife.com stands for. The company is building authentic shopping experiences for consumers and what they get in return from the consumers is authentic love.

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-Manish Mandhana,
CEO, Mandhana Retail Ventures

"I love to see people smile. Today we employ almost 10,000 people in our organisation and for me the greatest joy is to see them smile."

It always about a few learnings which make us successful. Manish had a humble beginning from Rajasthan where his father was an agriculturalist and made him move to Mumbai when he was studying in the third standard. It's quite a transitional change coming from a small town to an advanced city like Mumbai. It was not easy for Manish to face the sarcasm of his neighbours and whosoever he met during that time. This is when he decided that he will try to be known by his work.

He came from a small business family which was selling dhotis during the pre and post independence era. Manish grew up and made up his mind that he wants to get into fashion. He started off by supplying garments to wholesalers who would sell to small time discounters. He eventually graduated to exports but still felt that he needs to upgrade himself and do much better. He built his business passionately and ended up working with the who's who in the fashion business like Armani, Versace or Dolce & Gabbana, etc. "Through this learning and experiences with these powerful brands, I realised if I am making stuff for them why can't I do it for myself," he revealed.

His vision was to develop a 'Made In India' brand which can share stage with the global bigwigs. "My break came with Being Human and I am really thankful to Salman Khan. He had this foundation called Being Human that works in the areas of education and healthcare for the underprivileged and was struggling for funds. I thought if you do business keeping the social and environmental aspects in mind, we can contribute in a big way to the world. This is how the idea came to start Being Human Clothing. The brand was first launched in France and today has 300 point of sales internationally in Europe and Middle East and then we launched it in India. The brand is all about goodness, I personally believe that what you give comes back to you many folds. Also the satisfaction of being good or doing good is very important for me – much more important than making money for me," he concluded.



-Rahul Singh,
Director, Alcis

***"You know one thing about success?
It tastes the sweetest when shared!
So share!"***

Rahul Singh's father was an IT Engineer, his grand father an IAS officer and throughout the 400 years of family history that he can trace back to, no one has been an entrepreneur.

Describing how one becomes an entrepreneur Rahul says, "The moment your 'I Wish' changes to 'I Will', you become an entrepreneur. But the big question has always been 'where to start'? There always is a gap in any market place and an entrepreneur finds that gap and makes a market in that gap." Entrepreneurship is like living a few years of your life normal people wont, so that you can spend the rest of your life like most people can't, he highlighted. "It is a lot hard work, but what you can get as an entrepreneur is what others cannot even think of," he added.

Failures are a part of the package. But failures aid you in learning. Success is nothing but going from one failure to another failure without losing enthusiasm. Also, competition is very important, but one has to compete with oneself and not with others. If you continuously compete with others you get bitter. "The biggest competition for you is yourself this will lead to better thoughts, better decisions and better actions," he said.



-Jaydeep Shetty,
CEO, Mineral
-Priyadarshani Rao,
Creative Director

“Bollywood have decided fashion for a long time in India. But today the deciding factors are music videos, social media, peer groups, etc. Hence, it’s crucial for every brand to get fresher and get edgier with every season.”

Almost every fashion brand envisages to be big and walk in the same shoes of behemoths like Zara, H&M, or Uniqlo. Jaydeep quotes, “I think the problem is that we all use these as reference brands onto which we want to grow. There also is a different league of brands that are smaller in size but are equally respectable and above all, these brands have a soul. These are the brands that we look up at.” There is always a pressure to become a large scale brand, but at the end of the day, one has to ask himself what he wants to do. “Do you want to do something because everybody else finds value in it or is it something that you believe in,” he adds.

Today, fashion is synonymous with styles, assortments, range creation, collections and then ERP, research and analytics comes in, etc. “This is exactly what is wrong with fashion today. Rather fashion should be creating an identity, giving a concept, building a store around that concept and communicating that identity to the customers,” said Jaydeep.

Priyadarshini Rao compares fashion to movie business and said, “Fridays are judgment day and Mondays show you

the dashboard which actually reveals the numbers. Now the important question here is — what can we do to create and ideal business concept?” She adds that other than concept, there is the execution which is so important, the logistics, production etc.

Every instance of success is buttressed by a string of failures, which should not act as a demoralizer. “Another thing that we have learnt is that free advice, which you all know is abundant, doesn’t cut. It’s not worthwhile. You need to take advice from those who have their skin in the game, your game not their’s,” Priyadarshini Rao said.

Jaydeep in his closing remarks said, “Finally, what sells in fashion is the concept. The fashion company which will do well in today’s scenario is the one which respects designs.” He further adds that leadership should not be compared with size. We have to rather look at things which we are going to be proud of and which can get the customers back to our brand. The future will be defined by heretics and not by profits.



-Avnish Kumar,
Director, Neeru’s Ensembles

“We want to be more aspirational than being just a brand in the retail space.”

Avnish Kumar, in his address, outlined the long journey of that ethnic wear undertook to finally achieve the recognition that it enjoys in the Indian fashion segment today. “In the yesteryears, even the malls didn’t have a demarcated space for ethnic wear. It was real struggle; I remember how mall developers, when approached, would be like, the ground floor is for international brand, the first floor for men’s wear and the second for women’s wear. We have a couple of ethnic wear brands, we will place you there.”

For long, ethnic was highly misunderstood but today, things have changed, and ethnic wear commands a sizable share in the Indian retail space. “At Neeru’s, in our quest to make ethnic a subject all together, we came up with two of the most luxurious ethnic stores of the country — Neeru’s Emporio, our flagship stores in Hyderabad, in Jubilee Hills and Banjara Hills. In the Jubilee Hills store, each wing boasts of about 30,00-40,00 sq.ft of space; so that’s how much can be done in the ethnic wear segment. We have been successful in bringing the ethnic segment to the organised sector from the unorganised sector that it had been synonymous with since inception. Today, even investors are interested in the ethnic segment — that says it all.”





**-Mohita Indrayan,
-Manu Indrayan,**
Director & MD, 612 League

“Kidswear thus sits in the unique zone of needing to be trendy, modern, fashionable, cool yet adhering to the core values that appeal to the parents”

Kidswear has become increasingly complex from the simple yesteryears. Unlike in those days, that featured abundant outdoor play, family time and little entertainment in the form of Doordarshan, kids of today are tablet trained even before they are toilet trained. The world is their playground and the influences are Facebook, Instagram, Snapchat with popularity being measured by how many Instagram followers they have and how many likes do they get on their pictures in Facebook. As a whole, modern kids are very much aware and influence buying decision.

“So, basically we have two unique and principal consumers — the child and the parent, mostly the mother. So we have a fashion forward child, inspired by celebrity fashion who wants to create their own self image and on the other side is the parent, who is not opposed to trendiness, but still believes in the age old characteristics of affordability, quality and comfort. Kidswear thus sits in the unique zone of needing to be trendy, modern, fashionable, cool yet adhering to the core values that appeal to the parents,” Mohita said. Explaining the business side, Manu Indrayan defined, “The varied age wise

segmentations lead to challenges in SKUs and production management. When I look around this, I put this around excel sheets with number of sizes and the number of categories. But at the end of the day you realize that the excel sheets are two dimensional and fashion is four dimensional. So it definitely is hard to put it all in.” Every household holds tremendous opportunity for kidswear, but to reach each, esp., in a fragmented retail structure like India leads to channel management, which in turn leads to team management.

Today, consumer behaviour, interaction and communications are rapidly evolving. And then, multiplicity of channels is leading to communication management and at the top of the pyramid is the factor of pricing. This he calls the beast side of the business.

Today, 612 League today is available across 500 doors across 150 cities within six years of its launch and with a most diversified product portfolio. The brand has recently launched its first virtual store for kidwear, 612 Wonder Store, an engagement platform where consumers can try and buy merely through gesture control.



-Vijay Jain,
CEO & Founder, Orra

“One of the biggest change which I have witnessed today is that we are moving from the world of verbal to visual.”

Vijay Jain’s is a story of love-lost and love found again. Vijay describes his passionate story which started with his first love — photography. “I must have been 7 years old, and after much pestering my dad got me the only camera available in those days — a Click III camera; no zoom, no focus options, no flash. And a film costed me my entire month’s pocket money. So I had to ensure that I got every shot right and had to wait for weeks or even months to develop. So it was almost like management theory, you decide on a strategy and take actions but you have no clue about the outcome,” he said.

As time passed, life took over and he got occupied with the mundane routine of an investment banker. “But one of the biggest change which I have witnessed today is that we are moving from the world of verbal to visual. With the advent of social media people upload even one single pictures it says it all about his feelings. This is the reality for all of us. What has made this easy is technology,” he added. The world is changing and technology has progressed at an unbelievable rate. “You have to imagine a world and today it can become a reality. But the question is how can you learn? The point is if you have a desire to learn, it’s definitely possible. Today, everything is possible in the digital space.”





WBGMDA

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A REPORT:

IMAGES FASHION AWARDS 2017



For 16 years now the Images Fashion Awards are the premier recognition for excellence in fashion business in India. This edition of the awards that was held at the serene lake-side open lawns of the Renaissance Mumbai saw 25 awards being presented on the second day of the India Fashion Forum.

The big winners of the night were the Future Group. The conglomerates presence was felt across categories at IFA 2017, The Group was not only coronated with the *IMAGES Most Admired Fashion Company of the Year*, but it also bagged four more awards – the *IMAGES Most Admired Fashion Brand of the Year: New Launch* for its fast fashion brand Cover Story that was started in 2016, *IMAGES Most Admired Multibrand Fashion Retailer of the Year: Marketing and Promotions* for the “Free Shopping Weekend” promotion by Brand Factory; *IMAGES Most Admired Design Concept of the Year: Theme Store* for Central in “High Definition” and *IMAGES Most Admired Fashion Brand of the Year: Men’s Western Wear* for Indigo Nation.

Hot on their heels were the Landmark Group, Benetton and W, with two awards each. The Landmark Group bagged the *IMAGES Most Admired Fashion Retailer of the year: Large Format Store Chain* for Max Fashion and the *IMAGES Most Admired Fashion Retailer of the Year: Pan India Performance* for Lifestyle. “PantRobes” by W won the award for product design excellence – the *IMAGES Most Admired Fashion Design Concept of the Year*.

The event was emceed by anchor Neha Sareen and stand up comedian Ash Chandler and featured fashion collection showcases by Deal Jeans and Skechers. Also on the night was a dance performance by the very very cool Wild Ripperz crew who were winners of India’s Best Dance Group 2016, the first runner up of Dance Plus Season 2, and will be seen in the upcoming movie ABCD 3. The performance was powered by ALCIS brand. Ash enthralled the audience with his singing skills too. The grand finale was brought in by ace crooner Rachel Varghese .





Anchors Neha Sareen and stand up artist Ash Chandler

Attended by India's most prolific luminaries from the fashion retail fraternity, the ceremony recognised the achievements of outstanding fashion brands and retailers across 25 unique categories.

The jury of the IFA 2017 Business Awards included Abheek Singhi, senior partner and director, The Boston Consulting Group; Ankur Shiv Bhandari, MD, Asbicon Group; Bijou Kurien, Board Member, L Catterton Asia; Debashish Mukherjee, Partner, AT Kearney; Harish Bijoor, Founder, Harish Bijoor Consults; Hemant Mehta, Kantar-IMRB; Lara Balsara Vajifdar, ED, Madison World; Piyush Kumar Sinha, IIM Ahmedabad; Ravi Dhar, Yale School of Management and Amitabh Taneja, CMD, IMAGES Group. And the jurors for the Fashion/Design Concepts Awards included Anupreet Bhui, Senior Editor – Global Street Style, WGSN; Lara Balsara Vajifdar, ED, Madison World; Fashion designers Manoviraj Khosla, Rohit Bal, Ritu Beri; Mitchell Kass Founder & Creative Director Trend Council; Sarada G. Muraleedharan (DG, NIFT); Pradyumna Vyas, Director, National Institute of Design and Sunil Sethi, President, FDCI.

The awards process approvers were PwC.

SPECIAL FASHION SHOW BY SKECHERS



Wild Ripperz crew dance performance powered by ALCIS brand

SPECIAL FASHION SHOW BY DEAL JEANS



BUSINESS AWARDS



Presented by:
Devangshu Dutta, Chief Executive, Third Eyesight

Received by:
Datta Naiknavare, Chief Brand Manager, Indigo Nation & Lombard

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: MEN'S WESTERWEAR

INDIGO NATION

Citation: Indigo Nation has 450 points of sale pan India. The brand's retail space grew by 18 percent and the sales turnover grew by 40 percent over the previous year. Indigo Nation saw a remarkable response to its campaign #StartupNation - a campaign that best reflects the fearless and risk taking attitude of real life startup heroes.

NOMINEES:

Being Human | Celio | Indigo Nation | Tommy Hilfiger | United Colors of Benetton

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

ONLY

Citation: ONLY has 198 sales points with pan India presence. The brand has expanded its retail space by 12 percent and sales turnover by 43 percent over the previous year. The main objective of ONLY has been strengthening the imagery of denims, increasing visibility and awareness as well as effectively engaging with the customers on digital platforms.

NOMINEES:

AND | Deal Jeans | ONLY | United Colors of Benetton | Vero Moda



Presented By:
Devangshu Dutta, Chief Executive, Third Eyesight

Received By:
Sumit Suneja, Head - Business Development;
Mrithyunjay Amblimath, Head - Operations

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: KIDSWEAR

612 league

Citation: Kidswear brand 612 League has a pan India presence with 465 sales points. The brand's retail space grew by 65 percent and sales turnover increased by 36 percent over the previous year. 612 League has recently launched 'Wonder Store' concept through EBOs in India. First time ever in India, 'Wonder Store' is a virtual reality shopping platform based on the augmented reality technology that provides a fun filled retailing experience to the customers.

NOMINEES:

612 League | Pepe Jeans London | United Colors of Benetton | Vitamins



Presented By:
Devangshu Dutta, Chief Executive, Third Eyesight

Received By:
Mohita Indrayan, Co-founder & Chief Creative Officer;
Manu Indrayan, Co-founder & CEO



Presented By:

S. Ramesh Pothy, Managing Director, Pothys; **Jagmohan Batra**, CMD, Minodes Aaryahaan International Pvt. Ltd.

Received by:

Siddharth Kapoor, Vice President- Business Development; **Arjun Parashar**, Area Sales Manager (South West Delhi); **Siddiq Khan**, Area Sales Manager (Mumbai); **Rohiet Singh**, COO; **Palki Hatangadi**, General Manager; **Shalabh Dhingra**, Regional Manager; **Shefali Patel**, Store Manager; **T. Shrirangan**, Sr. Area Manager; **Rajesh Kamble**, Regional VM Head

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: MEN'S INNERWEAR

Calvin Klein
underwear

Citation: Calvin Klein has a total of 102 sales points with a growth in the same of 36 percent over the previous year. The brand's retail space expanded by 63 percent and sales rose by 52 percent over the previous year. Calvin Klein has also registered an EBO sales growth of 67 percent.

NOMINEES:

Calvin Klein | Park Avenue | Undercolors of Benetton



Presented By:

S. Ramesh Pothy, Managing Director, Pothys; **Jagmohan Batra**, CMD, Minodes Aaryahaan International Pvt. Ltd.

Received By:

Manjula Tiwari, CEO

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

◀ **TOMMY HILFIGER**

Citation: Tommy Hilfiger has a pan India presence with a total of 272 sales points. Tommy Hilfiger's retail space and sales turnover increased by 20 percent each over the previous year. The brand also prides in maintaining that 14 of its stores, with an average size of 2,000 sq.ft., touched the magical ₹1 crore mark this year.

NOMINEES:

Calvin Klein | Deal Jeans | Only | Pepe Jeans London | Spykar, | Tommy Hilfiger | United Colors of Benetton



Presented By:

S. Ramesh Pothy, Managing Director, Pothys; **Jagmohan Batra**, CMD, Minodes Aaryahaan International Pvt. Ltd.

Received By:

Shabia Ansari, Store Head, Calvin Klein Underwear; **Mubin Sheikh**, Area Manager (West); **Vishal Anand**, Head Operations, BD and Projects, Calvin Klein (India); **Sanjeeb Kumar**, Regional Head (West); **Punit Khatri**, Cluster Manager (West)

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: NEW LAUNCH

◀ **COVER/STORY**

Citation: Cover Story by Future Style Lab, is a subsidiary of the Future Group. Cover Story is a fashion retailer of women's clothing and accessories, with the style lab headquartered in London. It offers unusual collections that are in sync with the younger generation. The brand's luxurious and contemporary designs make the collection versatile enough to be worn on different occasions.

NOMINEES:

Cover Story | Champion's by Raymond | CK Main Label | Undercolors of Benetton



Presented by:
Manoviraj Khosla, Designer

Received by:
Vishwadipak Trivedi, Assistant Manager (Ethnic Category); Deepit Chugh, Assistant Manager- Designer- Women's Western Wear; Dimple Mistry, Deputy Manager (Design)

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

"FREE SHOPPING WEEKEND" BY



Citation: Brand Factory's "Free Shopping Weekend" garnered huge popularity and success. A total of 1,51,226 preview claims were delivered, while TVCs gained a unique reach of 3.6 million. The FSW used Facebook with exclusive content and gained additional 2.5 million unique reach. With FSW in place, the store did 300 percent higher than the average weekend turnover, 20% of its stores across the country achieved ₹1 crore turnover per day.

NOMINEES:

digital@Lifestyle | "Endless Ways" by Max Fashion | "Free Shopping Weekend" by Brand Factory | "Influencer" by Pantaloons



Presented By:
Harish Mehta, Certified International Speaker (Motivational)

Received By:
Pradeep Mahadik, Senior Manager, Undercolors (West); Hardik Panchal, Manager, VM (West); Sandeep Mane, Area Manager, LFS (West); Chetan Desai, Regional Sales Manager (West); Ketan Kulkarni, Deputy Manager- Business Development (West)

IMAGES Business of Fashion

IMAGES MOST ADMIRED AFFORDABLE FASHION RETAILER OF THE YEAR



Citation: One of the pioneers of Big-Box department stores, Pantaloons, prides in transitioning into a value fashion retailer. The mega organizational change delivered results like, like-to-like revenue growth of 5.7 percent, own brands revenue growth of 40.2 percent overall, own brands volume growth of 46.9 percent overall and increase in own brands mix to 62.4 percent.

NOMINEES:

FBB | Pantaloons | V-Mart



Presented By:
Manoviraj Khosla, Designer

Received By:
Sohel Dalal, Assistant Manager- Marketing; Roch D'souza, Chief Marketing Officer

IMAGES MOST ADMIRED SOLO-BRAND FASHION RETAILER OF THE YEAR: MARKETING & PROMOTIONS

UNITED COLORS OF BENETTON.

Citation: United by Don't: It was a social media campaign that instead of suggesting measures to ensure safety of women by simply telling them to not do a few things like stepping out at night, etc., initiated a conversation online, which further created a mass movement and garnered enormous response on social media.

United by Her: UCB started this CSR campaign for breast cancer awareness.

United by Play: This is a CSR campaign on religious violence and communalism.

NOMINEES:

"Stan Smith: Celebrating the Global Icon" by Adidas Originals | "Raymond Whites" by Raymond | Tommy Hilfiger, "Tricks & Do You" by Puma | "United by Don't" by United Colors of Benetton, "United by Her" by United Colors of Benetton | "United by Play" by United Colors of Benetton

IMAGES MOST ADMIRER FASHION RETAILER OF THE YEAR: CUSTOMER EXPERIENCE

SHOPPERS STOP

Citation: Digitization of stores in line with Shoppers Stop's omni-channel strategy; Hybris software giving consumers a one-view of the Shoppers Stop brand experience across multiple channels and devices. It launched the first of its kind 'Magic Mirror' - an augmented reality based virtual dressing room where customers can 'try' products virtually. Shoppers Stop has also launched its new mobile application and has revamped its website with improved navigation. Shoppers Stop partnered with ToneTag, a proximity communications firm, to integrate and deploy ToneTag sound-based contactless payments at Shoppers Stop stores. The company also has 46 lakh loyalty members.

NOMINEES:

Lifestyle | Pantaloons | Shoppers Stop



Presented by:

Harish Mehta, Certified International Speaker (Motivational)

Received by:

Anil Shankar, Customer Care Associate & Vice President- IT

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

max
MORE FASHION. MORE VALUE.

Citation: Max Fashion is celebrating its 12 years presence in India and is today over 170 stores across 65 cities. It has recorded a retail space growth of 25 percent over the previous year, with 33 percent of sales growth and a CAGR of 35 percent, making it the most profitable mono fashion brand in the country.

NOMINEES:

Central | Lifestyle | Max Fashion | Pantaloons | Shoppers Stop



Presented by:

Amitabh Taneja, Chief Convenor, IFF

Received by:

Nikhil Ranjan, Senior Manager - Retail Operations; **Piyush Sharma**, General Manager - Retail Operations (West); **Rajib Mukherjee**, Assistant Vice President - Retail Operations (East); **Raghu Rajagopalan**, President & COO; **Anupam Kumar**, Deputy General Manager - Retail Operations

IMAGES MOST ADMIRER FASHION COMPANY OF THE YEAR

FLF
FUTURE LIFESTYLE FASHIONS

Citation: FLF Brands - the brand division of Future lifestyle Fashion Ltd. is a new generation techno-pro company. Since inception, it has been constantly active in adopting new technology to bring in excellence possibly in every function, be it product design, manufacturing, supply chain, retail operation, customer experience or even finance control. **Converted Demonetization into Opportunity:** Using two key group values - speed and imagination, the company turned adversity into an opportunity. Brand Factory Free Shopping Weekend in Central paid ₹4,000 and shopped for ₹8,000. Scullers, Indigo Nation and Jealous 21 ran the #Pay4kget11k, leveraged loyalty points, incentives on use of debit cards, mobile wallets, mini ATM at Central and Brand Factory, to effectively turn adversity into an opportunity in order to do brisk business was a big achievement.

NOMINEES:

Aditya Birla Fashion and Retail Limited | Future Lifestyle Fashions Ltd | House of Anita Dongre | Neeru's Ensembles Pvt Ltd | Raymond Limited | Tommy Hilfiger Arvind Fashion Pvt Ltd



Presented by:

Amitabh Taneja, Chief Convenor, IFF

Received by:

Satyawan Daine, Store General Manager, Central (Goregaon); **Umesh Agnihotri**, Store General Manager, Central (Dahisar); **Sohel Dala**, Asst. Manage- Sales, Brand Factory; **Prakash Katara**, Head- Operations, Brand Factory; **Roch D'souza**, Chief Marketing Officer, Brand Factory; **Manjula Tiwari**, CEO, Cover Story; **Rachna Aggarwal**, CEO, Future Lifestyle Fashion; **Datta Naiknavare**, Chief Brand Manager, Indigo Nation & Lombard; **Charanjeet Kaur**, Marketing Manager (Mumbai)

DESIGN CONCEPT AWARDS

IMAGES MOST ADMIRER DESIGN CONCEPT OF THE YEAR: FLAGSHIP STORE (INDIAN ORIGIN) (THREE JOINT WINNERS)

NOMINEES:

Wills Lifestyle Flagship Store, Connaught Place, New Delhi | Numero Uno Flagship Store, Connaught Place, New Delhi | Global Desi Flagship Store, Khar, Linking Road, Mumbai | Raymond Flagship Store, Khar, Linking Road, Mumbai | AND Flagship Store, DLF Mall of India, Noida

Presented by: V. Muhammad Ali, COO Retail, Prestige Group



Received by:
Mohit Goyal, Assistant General Manager -Marketing, AND;
Neetu Luthra, Senior Manager -Marketing, Global Desi

Raymond Flagship Store,
Khar, Linking Road, Mumbai



Citation: This Raymond store is unique, ultra-luxurious and offers modern shopping experience, fusing the best in class technology with unmatched hospitality to redefine the consumers' retail experience. The store is showcasing 30-40 percent higher product assortment than its competitors. Asymmetric design provides clean minimalistic look, fixture design emphasizes modularity, efficient use of floor space using 40 percent less floor space for merchandize display for non-cluttered boutique hospitality look



Global Desi Flagship Store, Khar, Linking Road, Mumbai & AND Flagship Store, DLF Mall of India

(HOUSE OF ANITA DONGRE)

Global Desi: The store os spread across 2,000 sq.ft. with two floors. The store's interior is inspired from the evocation of the spirit of the global desi girl, infused with subtle elements, and sporting young and vibrant feel. The store has also got great feedback from its customers.

AND: The store is inspired by the New York style of living for the modern woman. French-window style at the forefront leads into an environment that delivers a congruent in-store experience. This new concept store is delivering higher per sq.ft. sales with lower base stock, as compared with its competing stores. Consumers are delighted with larger space to move around, better browsing and trial room experience, and are spending significantly more time in stores now.



Received By:
Vikas Bissa, Sr. Brand Manager; Sanjeev Rao, Director -Business Development; Madhu S. Dutta- Head Marketing

WILLS LIFESTYLE
Enjoy the change

Wills Lifestyle Flagship Store,
Connaught Place, New Delhi

Citation: Wills Lifestyle launched its own exclusive stores to give an enhanced international shopping experience and create a new store identity aligned to the brand's look and feel. Other key features of the store are error-proof, colour-coordinated, cross merchandise hangs, VM versatility in space and fixture design, elegant wardrobe shelving, visually appealing with judicious use of space that offers an international shopping ambience.



Received By:
Mithun Rawal, VM Officer (West); Francis Diago Fernandes, VM Officer (West)

IMAGES MOST ADMIRER DESIGN CONCEPT OF THE YEAR: **FLAGSHIP STORE (FOREIGN ORIGIN)**
(TWO JOINT WINNERS)

NOMINEES:

United Colors of Benetton Flagship Store | DLF Mall of India | Tommy Hilfiger Flagship Store | DLF Mall of India | Pepe Jeans London Flagship Store, Linking Road, Santacruz, Mumbai | Puma Flagship Stores, South Extension | Select Citywalk

Presented by: **V. Muhammad Ali**, COO Retail, Prestige Group



Received by:
Abhishek Ganguly, Managing Director, Puma Sports India Pvt. Ltd.



Puma Flagship Stores, South Extension & Select Citywalk

Citation: Global concept of forever faster is stores in Dubai, Berlin, Prague, Shanghai and now in Delhi. The brand's store façade highlights campaign of the season, visible footwear wall. Great concept and display, store design allows for more customer engagement.

Pepe Jeans London Flagship Store, Linking Road, Santacruz, Mumbai



Citation: A separate wall units and display systems for sections and merchandise create engaging zones within this space; the craftsmanship of Pepe Jeans has been highlighted with VM props like lamps, trunks and spools which lend a vintage look to the store. The Custom Studio which enables the customer to step into the design seat and customize their own denim, an energetic atmosphere infused with pops of vibrant hues, store graphics and digital signages. On the kids floor, there are interactive games like Play Station and Foosball table to keep the kids engaged and charged up. The store is youth oriented, has good VM and has a global feel.



Received By:
Shivani Lorai from Images Group (On Behalf of Pepe Jeans)

IMAGES MOST ADMIRER DESIGN CONCEPT OF THE YEAR: **THEME STORE**



Citation: Central made some radical changes to meet the shopping needs of an ever evolving shopper and now offers top of the league customer service. Central is now giving individual brands a voice; perceiving brand islands as brand installations with vivid reconstruction of brand store. Enough space for visibility; small brand stores in the store; trend setting store layout.

NOMINEES:

"A Fusion Approach" by Aurelia | Central in "High Definition" | "The Little Emperor" by Pantaloons | "The Unlimited Concept" by Jack & Jones | "Micky" by Only



Presented By:
V. Muhammad Ali, COO Retail, Prestige Group

Received By:
Charanjeet Gill, Marketing Manager (Mumbai); **Satyawan Daine**, Store General Manager; **Umesh Agnihotri**, Store General Manager



Presented by:

Bhavik Jhaveri, CEO and Founder, Pretr

Received By:

Chetan Desai, Regional Sales Manager (West); **Pradeep Mahadik**, Senior Manager, Undercolors (West); **Ketan Kulkarni**, Deputy Manager Business Development (West); **Hardik Panchal**, Manager- VM (West); **Ashish Solanki**, Deputy Manager- Project; **Sandeep Mane**, Area Manager, LFS (West)

IMAGES MOST ADMIRED FASHION DESIGN CONCEPT OF THE YEAR

“PantRobes” By



Citation: The collection by W is high-street, experimental and relentlessly chic. It offers a comfortable, freeing and glamorous look and comfort oriented styles with international colour palette.

NOMINEES:

“DramatiCones” by W | “Land Of Blue God collection” by Vajor | “PantRobes” by W, | “Smart Shirt” by Arrow

IMAGES MOST ADMIRED DESIGN CONCEPT OF THE YEAR: STORE VM

UNITED COLORS OF BENETTON.

Cubes of the “On Canvas” by UCB

Citation: Conceived to draw strength from the on-canvas store concept, it allows for distinctive presentations to provide a seamless way of merchandise experience. Dynamic windows, rich video wall, category zones for comprehensive product line up, thematic zones for dress up and dress down ensemble options, modular, large space store with hi tech engagements, are few key features of UCB store.

NOMINEES:

Cubes of the “On Canvas” by United Colors of Benetton | “Unusuals and Unethicals” by W | “Tropical City” by Wills Lifestyle



Presented By:

Bhavik Jhaveri, CEO and Founder, Pretr

Received By:

Jayesh Savla, ASM-Sales (West); **Madhu Kannan**, RM- Sales (West); **Anant Daga**, MD, TCNS Clothing Company Pvt. Ltd.; **Kankaiya Metugari**, MBO- Sales (West); **Shibu Kuttan**, AGM- Key Accounts (West); **Sujata Bhanse**, Senior Executive- VM (West); **Devendra Singh**, Assistant Manager- Marketing; **Pranal Sawant**, Supervisor- Key Accounts (West)

SPECIAL AWARDS



Presented By:

Thomas Varghese, Business Head- Textiles, Acrylic Fibre & Overseas Spinning Businesses, Aditya Birla Group

Received By:

Manohar Chatlani, MD, Soch & V. Muhammad Ali, COO Retail, Prestige Group

BEST PRESENTATION: SHOPPING CENTRE AND RETAILER COLLABORATION



PARTICIPANTS:

Malls:

DLF Mall of India | The Great India Place | Gardens Galleria, Infinity Malls | Prestige Malls | Pacific Malls | Ambience

Retailers:

Bestseller | Soch | Calvin Klein | Amante | Raymond | Shoppers Stop

SOUTH INDIA RETAIL AWARDS 2017



The IFA 2017 ceremony felicitated five of South India's outstanding retailing icons in a very special segment. The honourees included Dilip Kapur, President, Hidesign; G Rajendran, Founder, GRT Jewellers, Manohar Chatlani, CEO & MD, Favourite Shop and SOCH Studio; S Ramesh Poty, MD, Pothys and Padma Shri Dr. Nalli Kuppuswami Chetti, Chairman, Nalli Group.



Received By:
Dilip Kapur, Founder & President, Hidesign



Received By:
CS Balaji, VP- Marketing, GRT Jewellers (on behalf of G. Rajendran, Founder, GRT Jewellers)



Received By:
Manohar Chatlani, CEO and MD, Favourite Shop and Soch Studio



Received By:
S. Ramesh Poty, Managing Director, Pothys



Received By:
Dr. R. Natarajan, CRM & PR, Nalli Group (on behalf of Nalli Kuppuswami Chetti, Chairman, Nalli Group)

Presented by: Mukesh Kumar, Vice President, Infiniti Mall; and J. Suresh, Chairperson, India Fashion Forum and MD & CEO, Arvind Lifestyle Brands Ltd.

SHOPPING CENTRES CHOICE AWARDS

Shopping Centre's Choice Awards honour retailers and the results are decided on the basis of votes from India's most prominent shopping centres. Shopping centre developers, professionals, centre heads with their respective leasing and marketing teams from 42 shopping centres representing all regions and major markets joined in to vote for their chosen retailers. The verdict was delivered by all shopping centres of Pacific, Ambuja Neotia, Inorbit, Infiniti, DLF, Ambience and from Select CityWalk, Orion, Prozone, Phoenix Mills, Parsvnath, Barasat Mall, Westend Mall, Quest, Vegas and many other centres managed by Jones Lang Lasalle in India.



Presented by:
Bhavik Jhaveri, CEO and Founder, Pretr

Received by:
Dhatri Bhatt, Head - Public Relations, H&M

IMAGES MOST DESIRABLE FASHION RETAILER OF THE YEAR



NOMINEES:

H&M | Zara | Levi's | Tommy Hilfiger | Manyavar | Calvin Klein | Lifestyle

IMAGES MOST ADMIRABLE FASHION RETAILER OF THE YEAR: PAN-INDIA PERFORMANCE



Presented By:
Rajneesh Mahajan, Executive Director, Inorbit Mall

Received By:
Kaushlesh Paliwal, Business Manager, Lifestyle store (Indore); **Rahul B.**, Store VM, Lifestyle store (Thane); **Aditya Kothari**, Regional Marketing Head (West); **Sana Ansari**, Regional VM Coordinator; **Manoj Yadav**, Regional Concept VM (Ladies Concept); **Dilshad Khan**, Regional Concept VM (Men's Concept); **Atul Rane**, Regional VM Head (West)

NOMINEES:

Levi's | Tommy Hilfiger | Manyavar | Fabindia | United Colors of Benetton | Lifestyle | Jack & Jones | Max



IMAGES MOST ADMIRED
FASHION BRAND OF THE YEAR:
ACTIVE SPORTSWEAR



NOMINEES:
Adidas | Nike | Puma | Reebok | Skechers

Presented By:
Rajneesh Mahajan, Executive Director, Inorbit Mall

Received By:
Vishal Kapil, Director, IT, Adidas India

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



NOMINEES:
Meena Bazaar | Soch | W | Biba | Nalli | Fabindia | FBB



Presented By:
Rajneesh Mahajan, Executive Director, Inorbit Mall

Received by:
Jayesh Savla, ASM-Sales (West); **Pranal Sawant**, Supervisor- Key Accounts (West); **Madhu Kannan**, RM- Sales (West); **Sujata Bhanse**, Senior Executive-VM (West); **Shibu Kuttan**, AGM- Key Accounts (West); **Kankaiya Metugari**, MBO- Sales (West); **Anant Daga**, Managing Director, TCNS Clothing Company Pvt. Ltd.; **Devendra Singh**, Assistant Manager- Marketing



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



NOMINEES:
Manyavar | Fabindia | Study by Janak | FBB

Presented By:
Rahul Singh, Founder, Beer Cafe

Received By:
Vikram Saraf, Franchisee; **Sushil Agarwal**, Vice President, Vedant Fashions Pvt. Ltd.- Manyavar



IMAGES EXCELLENCE AWARDS

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: RISING STAR (TWO JOINT WINNERS)

Presented by: Rahul Singh, Founder, Beer Cafe



Received by:
Ashok Singal, CEO, Callino



Citation: Callino has 114 sales points, registering a growth of over 100 percent over the previous year. The brand started operations in October 2014. In 2016, within a short span of time, Callino crossed a 100 shop-in-shops. Its retail space grew by over 100 percent over the previous year.



Received By:
Avnish Kumar, Director, Neeru's Group; Harish Kumar, CMD, Neeru's Group

NEERU'S

Citation: Neeru's has 58 sales points with a growth rate of 18 percent over the previous year. Its retail space grew by 45 percent and sales by 10 percent over the previous year.

IMAGES MOST INFLUENTIAL SHOES & ACCESSORIES RETAIL PROFESSIONAL OF THE YEAR



Received By:
Rajesh Kadam, COO, Inc.5 Shoes

RAJESH KADAM, COO, Inc.5 Shoes

Citation: Rajesh Kadam is currently the Chief Operating Officer at Inc.5, a leading multi-brand Footwear company in India. He is responsible for the strategy and execution for Inc.5 in the areas of sales, marketing, exports and new initiatives. He has to his credit the design of a new format for retail selling in India, which is considered a path-breaking model by the industry experts. Kadam has extensive experience in running various trading and retail businesses. Kadam holds Bachelors degree in Commerce from the University of Mumbai and has keen interests in charity, especially for children. Also this year, he was included in Most Influential Retail Leaders listing organized by Asia-Africa-GCC Retail & Shopping Centre Congress & Awards.

Presented by: Rahul Singh, Founder, Beer Cafe



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Contact:
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—Vasanth Kumar,
Executive Director, Max Fashion India

Vasanth Kumar, Executive Director, Max Fashion India joined the Landmark Group in February 2005 as President, Max Retail Division—Lifestyle International. Vasanth is a M. Tech from IIT Madras and a PGDBM from XLRI. Before joining the Landmark Group he spent a decade with the core Peter England team and before that, he was with Hindustan Lever Ltd. Combining a lethal blend of Fashion, Retail and FMCG learnings, Vasanth has taken MAX, which was a new entrant in the Indian fashion retail space in 2006, to the very top of the ranking charts. MAX is, today, the single largest mono-brand fashion retailer in India.

max
MORE FASHION. MORE VALUE.



THE WAYS OF A WINNER: MAX FASHION INDIA

VASANTH KUMAR, EXECUTIVE DIRECTOR, MAX FASHION INDIA, SHARES THE SECRET MANTRAS OF THE MAMMOTH SUCCESS OF MAX FASHION INDIA IN AN EXCLUSIVE INTERVIEW WITH IMAGES BUSINESS OF FASHION'S MANAGING EDITOR RAJAN VARMA.

Rajan Varma (RV): Dear Vasanth, congratulations on MAX receiving the award for IMAGES Most Admired Fashion Retailer of The Year: Large Format Store Chain for the second year in a row. MAX is now clocking about ₹2,400 crores of sales annually and grows at a rate of 32-33 percent per annum. How do you manage to grow at a pace which is almost thrice the industry average?

Vasanth Kumar (VK): If I were to put it in one sentence, I would say that we believed in the “power of one” from the very beginning. One soul—one brand—one format—one consumer—one proposition; that has always been the core strength of MAX. It hasn't been an easy journey and there have been three phases of the MAX story in India. But it is nice to feel vindicated and I am very proud of my team that has ardourously toiled to help us reach where we are today.

RV: Can you kindly run us through the phases that you mention from the very beginning, I am sure MAX's entry phase would have been very interesting.

VK: Our first phase, which spanned the years from the launch of our first store in Indore in 2006 to 2010, were our formative years. At MAX in India, we consciously chose to go into a 100 percent private label format. The challenge at the beginning was that for a start-up, with a single mono-brand private label, it was extremely difficult to convince customers as to why we were superior to others, because others already had recognised brands in their stores whereas we didn't. To build credibility, what we did is that we vigorously took back the unsold stock, replaced it with new stock and never ever went into price discounting. What resulted is that MAX stores always looked fresh. Freshness was the key. And this convinced our customers that we were a fresh fashion store and that with us they could always expect quality. So, the consumers found faith in the brand name MAX. The second thing we did is that we took up only one size—10,000sq. ft. So, whichever MAX store the customer visited they got a similar and a familiar experience. And for every single department, whether it was men's wear, women's wear, accessories, etc., we chose to target just one customer segment, which was the middle to upper middle class family.

RV: Did you also take some strong tactical decisions to imbibe certain competitive advantages?

VK: Oh yes, absolutely! Our real estate strategy was unique. We didn't try the conventional. We never sought ground floor locations. In fact, even today, MAX is not present on the ground floor of any mall. By making this conscious choice, we reduced our occupancy cost and we also became meaningful to the developers as we were saying that we will drive the footfalls in your basements or first floors. About 98 percent of our stores are profitable, and very few of them had to fall out. The closure of a store impacts a brand's stature or perception. Since, our stores never shut down, customers perceived us as a successful brand, and so did the vendors.



RV: Sounds like MAX got it right in its first phase itself? in India itself?

VK: No, it wasn't so easy. In the first phase, even though we had clarity and we had opened around 40 stores we were still running in loss. Retailing is a learning business and so in our second phase over the years 2010 to 2014 we analysed customer preferences and behaviour in each of our first 40 stores and the new ones were opened. We understood their profiles, we customized, we tweaked the ranges—the ratios and the types of product within our portfolio to suit the customers coming in. For instance, we had started with a home range but we removed it.

We also invested heavily in the backend. We invested in training people to connect with the customers, along with the planning, the process, ERP and visual merchandising. We also simultaneously and meaningfully expanded into tier -I and -II cities and expanded the number of stores in our first phase cities.

RV: What would you say was the core of your shift from the first to the second phase?

VK: In essence, the change that happened in the second phase is that we evolved as a fashion retail organisation. From, a value fashion retailer that delivered products we

“Our real estate strategy was also unique. We did not do the conventional. We never aspired for ground floor locations. We reduced our occupancy cost and we also became meaningful to the mall developers as we were saying that we will drive your footfalls in your basements or first floors for you.”

morphed into one that crafted and curated fashion looks. We started focussing on combos—tops and bottoms together. We don't do basics like plain t-shirts at all.

In this phase, we also started improving our analytics, started understanding the behaviour of our customers better, and we started cross promotions. For example, we had observed that many customers came in and bought only kidswear. They did not buy anything for themselves. We reached out to these customers and told them we also have collections for you. Another key goal that emerged in the second phase was to make MAX a pan-India brand.

“The change that happened in the second phase is that we evolved as a fashion retail organisation. From, a fashion mega-retailer that delivered products we morphed into one that crafted and curated fashion looks.”

Apart from developing structural and fashion excellence; and creating interesting looks we also started investing in properties that connect with the youth in the second phase. We have tied up and launched the Elite Model Look. Similarly, we initiated MAX Emerging Star and the MAX Design Awards wherein we go to 70 colleges and host design and talent competitions.

These were initiated because we saw that a lot of college students were coming to us, and so we thought why don't we extend into their lifestyle aspirations and support certain career opportunities for them. After all, a fashion brand is part of a broader fashion lifestyle. There are young models and designers who want to make it big or maybe get into the Fashion, Film and Design circuits and MAX offers these platforms for them. Even today, Max doesn't have a celebrity brand ambassador. We believe that MAX is not the brand for celebrities, but rather it should help people become celebrities. We are a catalyst that empowers the lifestyle aspirations of the dynamic modern Indian middle-class families and youth.

We invested in these properties where we built a superior experience for the





customer, and thereby ameliorating their connect with MAX. These initiatives were communicated by PR and digital. Once these were disseminated, we were also able to get more customers into our stores.

RV: What new is happening now at MAX in the third phase now?

VK: The third phase began after 2014. And, today I can proudly say we are present pan-India with 200 stores over 85 cities. Last financial year we opened 40 new stores as per our target. For this fiscal, we have planned 50 new stores and they are opening at a rate of one per week even as we speak. Even our regional skew has balanced out now. Our strongest market is south India, with 42 percent of our stores, followed by 28 percent in North, 20 percent in West and expanding fast in East with currently 10 percent of stores. I consider this a good development.

RV: What is the advantage of being pan India and does it empower some other initiatives?

VK: Finally, MAX is also into mass media and into mainline television because now we are present in most cities. We launched our first TV advertising campaign last season which was received very well. Mass media has its own impact and goes hand in hand with distribution and supply chain development. If you don't advertise you will not be able to build brand awareness in smaller cities. I'm talking about the penetration, and this has gone up a level definitely.

We used a FMCG type route with our advertisement campaign which is framed in humorous slice of life situations and offers solutions in "Endless Ways" to "Win Her Back" and for "Damage Control". It reinforces the brand's key motto "Fashion for the entire family at great prices" via a promise of many new collections and styles in store. The real-life simplicity of the creative establishes an instant emotional connect with consumers.

A phased TV campaigns across GEC, movies, kids, infotainment and music channels was backed by radio spots, and print ads in top regional and English publications in top markets. #EndlessWays was also integrated in popular TV serials and radio innovations; and by digital outreach and google display banners on popular websites. We also initiated on ground activations at malls. The highlight of the digital campaign was a collaboration with "Terribly Tiny Tales" to increase brand conversations through user generated content – people were invited to write their own #EndlessWays stories and post on Facebook, Twitter and Instagram. This integrated campaign drove footfall growth by 43 percent, incremental sales grew 53.9 percent over the previous promotion period,



and in all, 44 percent new customer enrolments over the first 42 day promotion period.

RV: Tell us a bit about MAX's initiatives on the omnichannel front?

VK: MAX currently gets 1 percent of its sales digitally and through maxfashion.com and expects to achieve incremental turnover in high single digit percentage over the next

5-6 years. MAX will digitally engage with its reach of 9 million customers at www.maxfashion.com and an additional 12 million customers of www.lifestylestores.com.

We at MAX will be launching a special cross functional initiative called Easy Kiosk as a pilot in Bengaluru in the first half of June 2017. This will begin at 5 stores and will be a world class intranet enabled consumer experience connected to the real-time inventory warehouse. It will deliver looks apart from sizes. We are trying to make it more experiential and are training a few department managers besides the last-mile staff. Together, we will have curated looks loaded onto the technology and will be available then-and-there. We are also going to implement Wi-Fi in our stores as a part of enabling customers to simultaneously sync their physical and digital experience with us.

RV: Amongst MAX customers, aren't there some that want something more special and more premium?

How do you serve these aspirations or you don't? And which categories perform the best at MAX?

VK: Our core positioning is value fashion and we don't want to dilute that but during the festive season MAX does introduce a premium range called the MAX Limited Edition, but again with fully justified value. We will, in fact, add a little extra and try out more this year. We have successfully done such fashion inventions. We have also launched "Tavish" and "Tavisha" which are premium fusion lines and they have received great response. As regards categories, while the brand performs very well in kidswear, with 23 percent of its sales comes from the segment, MAX is a well-balanced family shopping destination. All departments – men's wear, women's wear, ethnic contribute between 20-25 percent of sales and footwear and accessories do about 10 percent. MAX does indeed run on all its legs.

RV: And which is the best performing MAX store in India?

"Today I can proudly say we are present pan-India with 200 stores over 85 cities and the store count is increasing at a rate of one new store per week now."

VK: The MAX store on Commercial Street in Bengaluru pulls home sales of ₹80 crores in a year.

RV: While your growth in India is phenomenal, how big is it in context of the MAX brand globally?

VK: The turnover of Max India is already 25 percent of the total Max global turnover. There are 250 MAX stores outside India. However, considering that the international stores are double the size of the Indian stores, and they retail many more categories like home, maternity, plus sizes, etc., MAX has performed exceptionally well in India.

RV: What are your future growth targets for India? Do you feel there are some factors that may limit the MAX growth at some stage?

VK: We want to continue the growth, and break the ₹5,000 crore annual turnover mark within the next 4 years. We will also launch new lines. In fact, we will soon be launching maternity wear in India. We do have a limitation, MAX cannot go beyond 100-110 cities. We launched MAX in a couple of tier -III towns but MAX didn't click as they are still very conservative so the catchment doesn't connect with us. We stopped our expansion in tier -III, and we have launched a new brand called EasyBuy. The pricing at EasyBuy is 30 percent lower than MAX, and it has been conceptualised on a FMCG kind of a thought.

RV: Tell us a bit more about the EasyBuy format. What stage is it at in India?

VK: The average size of EasyBuy stores is about 5,000 sq. ft. and it is also a 100 percent private label format. The stores are 100 percent franchised and it is a perfect format for tier -III

and beyond. Currently, 22 stores have already opened across 15 cities and the format will expand at a rate of 1 new store every three weeks. EasyBuy has been accepted well. It is doing about ₹150 crores of business and is growing at about 45-50 percent per annum. While EasyBuy comes under the same division of Landmark Group as MAX, it is a new vertical, wherein both the back-end and front-end are separate and the only thing shared in common are support functions like IT, HR, etc. We are in the build up stage and the current focus is on developing a robust supply chain for EasyBuy and region-wise we are focusing on South because to get the correct pricing and quality network it will take time just like MAX took initially. Next year the east zone will be a thrust area for EasyBuy. East will obviously be a very big opportunity for us, since even MAX has not entered many cities in the east.

RV: Finally Dear Vasanth, how does it feel to receive the award for IMAGES Most Admired Fashion Retailer of The Year: Large Format Store Chain for the second year in a row?

VK: IMAGES is a very discerning organisation focused on the well-being



"We want to continue the growth, and break the ₹5,000 crore annual turnover mark within the next 4 years. We will also launch new lines. In fact, we will soon be launching maternity wear in India."

of the industry. It very meaningfully caters to the aspirations of the varied industry stakeholders be it retailers, brand, vendors or developers, through its many initiatives. Further, it is an organization built from scratch and how Amitabh started it and the stature it has reached now is commendable. I always admire and deeply respect both focus and enterprise. Me as an individual and a professional and MAX as an organization both feel deeply honoured in receiving this award.



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

Max Fashion, which was celebrating its 12 years presence in India, recorded a retail space growth of 25 percent over the previous year, with 33 percent of sales growth and a CAGR of 35 percent, making it the most profitable mono fashion brand in the country during the award analysis period of 1st January 2016 to 31st December 2016.

The award was presented by Amitabh Taneja, Chief Convenor, IFF; and was received on behalf of MAX by Nikhil Ranjan, Senior Manager - Retail Operations; Piyush Sharma, General Manager - Retail Operations (West); Rajib Mukherjee, Assistant Vice President - Retail Operations (East); Raghu Rajagopalan, President & COO; and Anupam Kumar, Deputy General Manager - Retail Operations.



INDIA BRAND SHOW 2017



L-R: Dhruv Vaish, Shravan Reddy, Nachiket Barve, & Zubair Kirmani.



Artist Soundarya Jayachandran.

The India Brand Show 2017 was held on the 12th April 2016, on the evening of the first day of the IFF. The show unveiled the looks of the season and upcoming collections to the best of the retail world. As the participating designers and brands showcased their latest fashion offerings with style and panache, the India Brand Show 2017 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. It was also 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 show started with an exclusive showcase by The Woolmark Company, featuring Noire (by designer Dhruv Vaish), the mega brand Louis Philippe, followed by a collection by Nachiket Barve, and Bounipun (designers Zubair and Renni Kirmani). Following this, The Woolmark Company's new wool ambassador for India, actor Shravan Reddy, who is known for his strong digital following walked on the ramp. The Woolmark Company is the global authority on wool. The Woolmark logo is one of the world's most recognised and respected brands, providing assurance of the highest quality, and representing pioneering excellence and innovation from farm to fashion.

Other brands that participated in the show included, Mexico Jeans, Celio, Tommy Hilfiger, Raymond Fine Fabrics, Raymond Ready-To-Wear, and Raymond Made To Measure. The event concluded after a brief set by artist Soundarya Jayachandran.





DHRUV VAISH

Dhruv's collection "Noire" is all about exploring the colour black in varied shades, forms, textures and layers. Hues of white and chrome peek out to subtly complement the bold black tones. Sophisticated and understated designs are the highlight of this collection. Luxurious wool flannels and tweeds are mixed with lightweight cotton, terri wools and leather details. Structured crop jackets, long coats and club jackets are paired with relaxed trousers and shirts.



LOUIS PHILIPPE

Defining class, elegance and status, Louis Philippe is a purveyor of fine clothing for the discerning gentleman. In pursuit of excellence, Louis Philippe stands for precision in craftsmanship that translates into clothing that are classic and contemporary, and perfect for the quintessential man. An international super brand for menswear clothing, Louis Philippe offers a range of formals, semi-formals, custom-made clothing and accessories.

BOUNIPUN

Blending references from Sufism, architecture, craft, and art, and born and raised in Kashmir; designers Zubair and Renni Kirmani represent the yin and yang of the state in which they live. Bounipun prides itself on redefining the men's wear landscape by adopting Kashmir craft practices, working with skilled locals to present historic artistry to a global audience, creating a signature style that fuses contemporary minimalism with classic heritage.



NACHIKET BARVE

Nachiket has explored Merino Wool through weaving, jacquard and intricate embroidery. Inventing a pioneering use of non-woven compressed Merino Wool felt for applique; the non-fraying qualities of felt have been harnessed in the collection. The celebration of traditional skills, expressed in a contemporary rendition makes it an exciting and unique proposition.





CELIO

Celio is a French men's clothing retailer headquartered in Saint-Ouen, France. Founded in 1985 with the aim of offering fashionable, affordable clothing for men, Celio is today present in the four corners of the world with 1,100 stores in more than 60 countries .



MEXICO JEANS

Mexico is a family-owned company producing quality denim for men for nearly a decade now. It caters to a fashion audience between the age of 18 to 60 years. The brand is a must-have for those who seek perfect fit and unmatched contour from their jeans.



TOMMY HILFINGER

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. The brand is present in 115 countries and more than 1,600 retail stores throughout North America, Europe, Latin America and the Asia Pacific region.



RAYMOND FINE FABRIC

For over 80 years, Raymond has been 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. It offers suiting and trousering fabric for all occasions and needs.

RAYMOND MADE TO MEASURE

Raymond Made to Measure is a unique service of premium clothing from the house of Raymond - The Complete Man. This luxurious service allows discerning customer to personalize their ensemble bringing together their own personal taste. Consumers can take a pick from the finest of Raymond fabrics and contemporize it with an extension of their choice. From suits to formal jackets and shirts to an entire outfit; consumers can customize to what suits their inner style.



RAYMOND READY TO WEAR

Tailored from the finest Raymond fabrics, Raymond Ready-To-Wear is a premium formal wear brand which is positioned to offer classic garments with impeccable fits and inviting styles to the global Indian. The brand reflects the persona of a confident, discerning, classy and intelligent man. A person who is well educated, well traveled and above all is sensitive and caring. Virtues like these make him the complete man in true sense of the word.



RETAIL COMPLIANCE CONCLAVE AT IFF 2017



—Harish Mehta,
Motivational Speaker, Certified
International Speaker

A two day Retail Compliance Conclave and Certification Program was held at the India Fashion Forum 2017 on 12th and 13th April, in Mumbai. The theme of the conclave on was 'Moving Toward an Empowered Customer-Centric Culture'. This conclave was presented by 'IRF Trusted Mark'. Trusted Mark Secretariat offers programs to train professionals on retail standards with ISO experts/certification bodies and retailers.

The conclave included the following key speakers:

Karun Sharma, Managing Principal, Green & Positive

Anantha Prabhu, General Manager- Training Services, South Asia Region & Global Accreditation- Training, Bureau Veritas

Rajesh V. Sharma, Manager, Alcumus ISOQAR

Ramesh Koregave, Director-Certification (India & South Asia), Bureau Veritas
Additional guest speakers included:

Rakesh Mishra, VP and Head of Marketing, Target

Harish Mehta, Motivational Speaker, Certified International Speaker



—Karun Sharma,
Managing Principal, Green & Positive

The participants at the conclave fell under two categories:

Category 1 comprised of people from fields like, customer service, operations, compliance, legal, regulatory, corporate affairs, marketing, and HR professionals in retail organisations. Category 2 comprised of trainers, auditors and marketing professionals of certification bodies and also retail consultants. Some of these delegates represented brands like Max, Bestseller, Croma, Hidesign, Enrich Salons, Vera Moda, United Colors of Benetton, SGS, Intertek.

The conclave was open to all delegates at IFF but only those involved in group discussions and take exams will be given certificates, after successful completion and acquiring marks in two level categories.

The 'Trusted Mark' Certification Scheme has been launched for retailers and retail businesses spanning across all retail operations including hypermarkets, super markets, department stores, speciality stores, e-retailers and service providers, restaurants, jewellers, pharmacies, salons, spas, wellness centres, FECs and cineplexes. The 'Trusted Mark' Certification Scheme aims to serve two purposes. The first is to inform the industry about the 'Trusted Mark' Scheme and encourage them to improve on their practices and systems. The second is to assure consumers that retailers will adhere to the requirements of the scheme, which is consumer

centric. IRF Trusted Mark Secretariat aims to undertake a nationwide campaign to establish the 'Trusted Mark' as the seal for consumer trust.

The Objectives of the Program were to educate:

How to deliver 360 degree customer centric service in retail?

How to assure customers that you value their trust?

Understand the technical requirements of trusted mark certification

- preparation, audit and the entire certification process.

The first day of the Retail Compliance started with the registration by the participants and a networking meet for those present.

Introducing the scheme, **IRF Convenor, RS Roy** said that the sole objective of IRF was to modernize Indian retail; bring retailers across the country into the fold of structured businesses with modern systems and processes following government rules and regulations. IRF Certification scheme is a step forward to encourage retailers to be more customer centric and adhere to the 'Trusted' standards in all retail operations. "IRF covers various verticals of the retail industry like textiles & fashion, shoes & accessories, sportswear, food & grocery, beauty & wellness, food service, consumer & personal electronics, books, music, toys & gifts, home & office improvement, leisure & entertainment, etc., through its various print and online publications and websites," he added.

Ramesh Koregave, Director-Certification (India & South Asia), Bureau Veritas, commenced by asking why standards in retail are important and followed by a brief description of the risk based performance model in generic sense, evolution of retail industry from barter system to the modern super and hyper markets so as to provide the customer with the 3Vs (volume, variety and value) of retail. Overall growth of



—RS Roy,
Convenor, IRF

the retail industry is projected to reach ₹47 trillion in 2016-17 with a CAGR of 15 percent (according to CRISIL Research) in which the organised sector enjoys a 10 percent share up from 7.1 percent in 2011-12. "The factors contributing to the success in retail are hiring right type of employees, undertaking marketing, buying the right merchandise, market positioning, good customer service," he added.

Karun Sharma, Managing Principal, Green & Positive, introduced Harish Mehta, Certified International Motivational Speaker who re-energised the room with his talks. He had a simple formula in life. "BE_xDO=HAVE". Everyone in the audience wondered what it was and to resolve the audiences' curiosity Mehta said that it is 'the way you be and the way you do the more you will have' and left everyone in the audience with deep thought. He explained, "Expectations kill the joy in everything. In life, you get what you want when you know what you want. Whatever you do has 90 percent strategy and only 10 percent execution. It is how you do anything that decides how you do everything." Before concluding the session, he asked everybody to repeat after him, "I am confident and fearless. I will write my goals today. I will achieve all my goals and I am the best" and gave a hi-five to each and every participant present in the room.

Rajesh V. Sharma, Manager, Alcumus ISOQAR thanked Harish Mehta and continued the conclave by

noting down the expectations of the participants from the retail compliance conclave where majority of the brand representatives wanted to know how to implement the IRF scheme within their businesses to which a brief explanation was given with live examples. **Anantha Prabhu, General Manager- Training Services, South Asia Region and Global Accreditation, Training, Bureau Veritas** joined in the open discussion to give further knowledge about the scheme to the audience.

Guest speaker **Rakesh Mishra** talked about global customer centricity, humanization of technology and omni-channel retail, to the audience. The first day's session ended after touching upon and announcing a few topics in the IRF scheme which was to be continued on the next day.

The second day of the Retail Compliance started with networking among the people present and carried forward with a recap of the Day 1.

The day proceeded as **Bhupesh Dinger, Director - Operations, Enrich Salons & Academy**, talked in detail about the certification process of world's first programme in Customer Centric Standards in Retail and about the aspirations of the 'Trusted Mark'. This was followed by a master class where a group discussion was held on various case studies, problems and solutions. Later, another group discussion was held on SOPs/policy manuals- documentation, approvals, amendments, communication of policies, empowerment of staff to execute/implement.

Towards the evening, Harish Mehta took over with a session titled, "Its time now for you to lead all your operations and resources towards customer centricity".

The day ended with the examinations of the participants for the certification.





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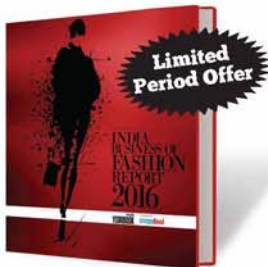


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MEMBERSHIP FORM

The Indian fashion industry is today a very fast-moving, challenging category. Technology and consumer behaviour are forcing fashion retailers to constantly evolve and adapt to these changes.

And that is where India Fashion Forum (IFF) comes in. It is India's largest fashion market intelligence hub, and its members have unparalleled access to every connection, information and research that they need to ensure informed and profitable growth of their businesses.

Membership of India Fashion Forum Privilege Club – India's largest fashion retail network – offers:

- Pan-India networking and business development openings for top leaders and industry influencers.
- Multiple routes to optimise brand visibility and marketing reach.
- Instant access to IFF's multiple knowledge platforms and a broad network of top-level decision makers and business owners.
- Connecting them to the entire value chain (designing, buying & sourcing to manufacturing, merchandising, branding, marketing & retailing) round the year.
- Privilege access to **India Fashion Forum** annual fashion retail intelligence event, including an exciting blend of Conference sessions, CEOs Roundtables, workshops and masterclasses, zoned exhibitions and industry awards.

HOW TO ENROLL?

Choose your category/ies from below:

- Fashion Retailers
- Fashion Brands, Exporters & Manufacturers
- Suppliers to Fashion Brands, Retailers, Exporters & Manufacturers

A group operating in more than one category may enroll its different companies in their respective categories. To know the applicable fee and entitlements please refer to the table IFF Annual Membership Fee & deliverables. Service tax will be levied as applicable which at present is 15%. A proforma invoice can be mailed on request.

IFF Annual Membership Fee may be paid by draft/ cheque payable to Images Multimedia Pvt. Ltd. or bank transfer (details below).

Current Account No: 02482000004779 | **Account Title:** Images Multimedia Pvt. Ltd. | **Bank:** HDFC Bank Ltd.
| Branch: S-355, Panchsheel Park, New Delhi 110 017 | **RTGS Code:** HDFC0000248 | **MICR:** 110240029

MEMBER INFORMATION

Company Name	
Category	
Address for communication	
Name of the person responsible for IFF communication and coordination	
Designation:	
Ph:	
Cell:	
Email Id:	

OTHER REQUIREMENTS:

- Please send brand / organization logo along with high resolution pictures of key people, products & services. The pictures can be sent through yousendit or wetransfer. All visuals should be of 300 dpi.
- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

IFF CONTACTS FOR MEMBERSHIP:

- **Anil Nagar**, +91 9811333099
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NAME/S OF AUTHORISED REPRESENTATIVE/S TO AVAIL IFF PACKAGES

Name:	Designation:	Phone:	Mobile:	E-Mail:

IFF SECRETARIAT

IMAGES MULTIMEDIA PVT. LTD.
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 New Delhi 110020.
T: +91 11 40525000
F: +91 11 40525001
W: www.indiafashionforum.co.in

Signed by CEO / Director / Owner
 Name:
 Designation:

Company stamp/ seal



**YOUR
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IFF ANNUAL MEMBERSHIP & DELIVERABLES*

Membership Categories	For Fashion Retailers:					For Textile Buyers = Fashion Brands, Exporters & Manufacturers:		For Vendors = Suppliers to Fashion Brands, Retailers, Exporters & Manufacturers:	
Category Code:	A1: Fashion Retailers with less than 5000 sq ft. retail space	A2: Fashion MBOs/ Independent Retailers	A3: Regional Chains – 3 or more stores. A4: Brands with Owned Brand Outlets/ Shop-in-shops)	A5: National Department Stores/ Large Format Fashion Stores A6: Online Retailers	A7: Groups with Multiple Retail Formats + Franchise/ Distribution/ Licensing/ Own Brand operations	B1: Fashion & Lifestyle Brands (without own stores/ SIS)	B2: Exporters, Manufacturers & Buying Houses of Fashion & Lifestyle Products	C1: Fibres, Fabrics & Finishes	C2: Trims & Embellishments C3: Fashion Franchisees & Distributors
All Inclusive Annual Fee (Service tax extra)	Rs. 5,000	Rs. 25,000	Rs. 50,000	Rs. 1,00,000	Rs. 1,50,000	Rs. 50,000	Rs. 15,000	Rs. 50,000	Rs. 30,000

DELIVERABLES

1	Feature/s, Editorial coverage subject to Editorial guidelines in relevant Images publications/Research Books/coffee table books print/ online (Data & information to be provided by members)	1 Page	1 Page	2 Pages	4 Pages	6 Pages	2 Pages	1 Page	2 Pages	1 Page
2	FOC promo banners in Indiaretailing.com portal/EDM (applicable as per category)	FOC up to Rs.5,000	FOC up to Rs.25,000	FOC up to Rs.50,000	FOC up to Rs.1,00,000	FOC up to Rs.1,50,000	FOC up to Rs.50,000	FOC up to Rs.15,000	FOC up to Rs.50,000	FOC up to Rs.30,000
3	Entry Pass for IFF/ Trendview Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Shows	1 Pass	2 Passes	2 Passes	4 Passes	6 Passes	2 Passes	1 Pass	2 Passes	2 Passes
4	Special Invite for IFF Power Breakfasts, Networking Lunches, Awards & Gala Dinners	NA	2 Invites	2 Invites	4 Invites	6 Invites	2 Invites	1 Invite	2 Invites	2 Invites
5	Lounge Access at India Fashion Forum for B2B Meetings	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Research Reports & Publications (Print/ Online)	FOC up to Rs.2,000	FOC up to Rs.5,000	FOC up to Rs.10,000	FOC up to Rs.20,000	FOC up to Rs.30,000	FOC up to Rs.10,000	FOC up to Rs.3,000	FOC up to Rs.10,000	FOC up to Rs.5,000
7	Images Fashion Awards	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee (in applicable category)	2/3rd waiver on awards nomination fee (in applicable category)	2/3rd waiver on awards nomination fee (in applicable category)	2/3rd waiver on awards nomination fee (in applicable category)
8	Presence on India Fashion Forum Website	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link

*Deliverables are subject to submission of inputs/ confirmations/ approvals/ additional charges wherever applicable by specific dates/ deadlines as communicated to members. Deliverables are subject to change without notice.

Additional Benefits:

- ▶ Special Packages to join IFF delegations for national & international retail trade shows.
- ▶ Special packages for members for Print Ads in relevant magazines.
- ▶ Speaker/Panel discussion opportunities subject to availability of slots
- ▶ Priority in processing of your application for 'TRUSTED MARK' Certification.
- ▶ CEO's picture & profile in 'Who's Who' page on indiaretailing.com website
- ▶ Support & connect with potential partners.

NEXT
ISSUE

THE CASUALWEAR SPECIAL ISSUE

IMAGES
BUSINESS OF FASHION
JUNE 2017



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If we look through the human wardrobe over the last 50 years, we will find that the first phase— the 60s was about expressing one's beliefs, cultures, freedoms, music and arts. The trend then shifted in the late 70s and 80s to power dressing and hard structured clothing—strong linings and huge paddings.

Then, almost as an anti-thesis, Friday Dressing arrived and power and success were no longer related.

The new generation did not feel it had anything to prove by clothing alone. This new hero preferred casual elegance above any imposed rules or strictures.

An effortless way of dressing was thus established as a virtue.

From then on, effortless moved to comfort with *streetwear*, then onto functional fitness with *sportswear*, then fashionable fitness with *athleisure*. The movement towards total ease today manifests physically with *pyjama party-lounge dressing* and mentally through the peaceful nothingness of *normcore*. And today, even at most premium formal occasions, you will find most people turning up in sockless loafers teemed with bright roomy casual suits which in turn are heavily pocket patched.

The Casual Way is now indeed all pervasive and is the Dominant Mainstream Force in Global Fashion today.

The Images BoF Trade Fair Trilogy - comprising the June, July and August 2017 issues - kick off with a celebration of the rise of Casualwear. Within the overall Casualwear study, we will...

- > Define and Size the Total market and its Main Segments
- > Outline the Opportunities and Challenges
- > Evaluate Top Global Casualwear Trends & their Pervasiveness in India
- > Study its impact on Womenswear & Kidswear
- > Showcase the ways and success mantras of Casualwear Brand Leaders

EXCLUSIVE REPORTS

- > **IFF 2017: FASHION EXHIBITION**
- > **FUNDING AND INVESTMENTS IN INDIAN FASHION**

NEW SECTION:

THE INDIA FASHION FORUM INNOVATION CRUCIBLE (IFFIC)

- > Our 'IFFIC Company of The Month' is Tukatech. Do read our exclusive interview with Ram Sareen, the company's charismatic founder and see how Tukatech continues to redefine fashion manufacturing globally.
- > Our 'IFFIC Star of The Month' is Thomas Cridland, a young British entrepreneur, who aims to create the world's no.1 sustainable fashion brand, and whose fans already include Leonardo DiCaprio, Ben Stiller, Rod Stewart, Hugh Grant, Nile Rodgers, Daniel Craig, Miley Cyrus, Clint Eastwood and Kendrick Lamar, amongst many others.

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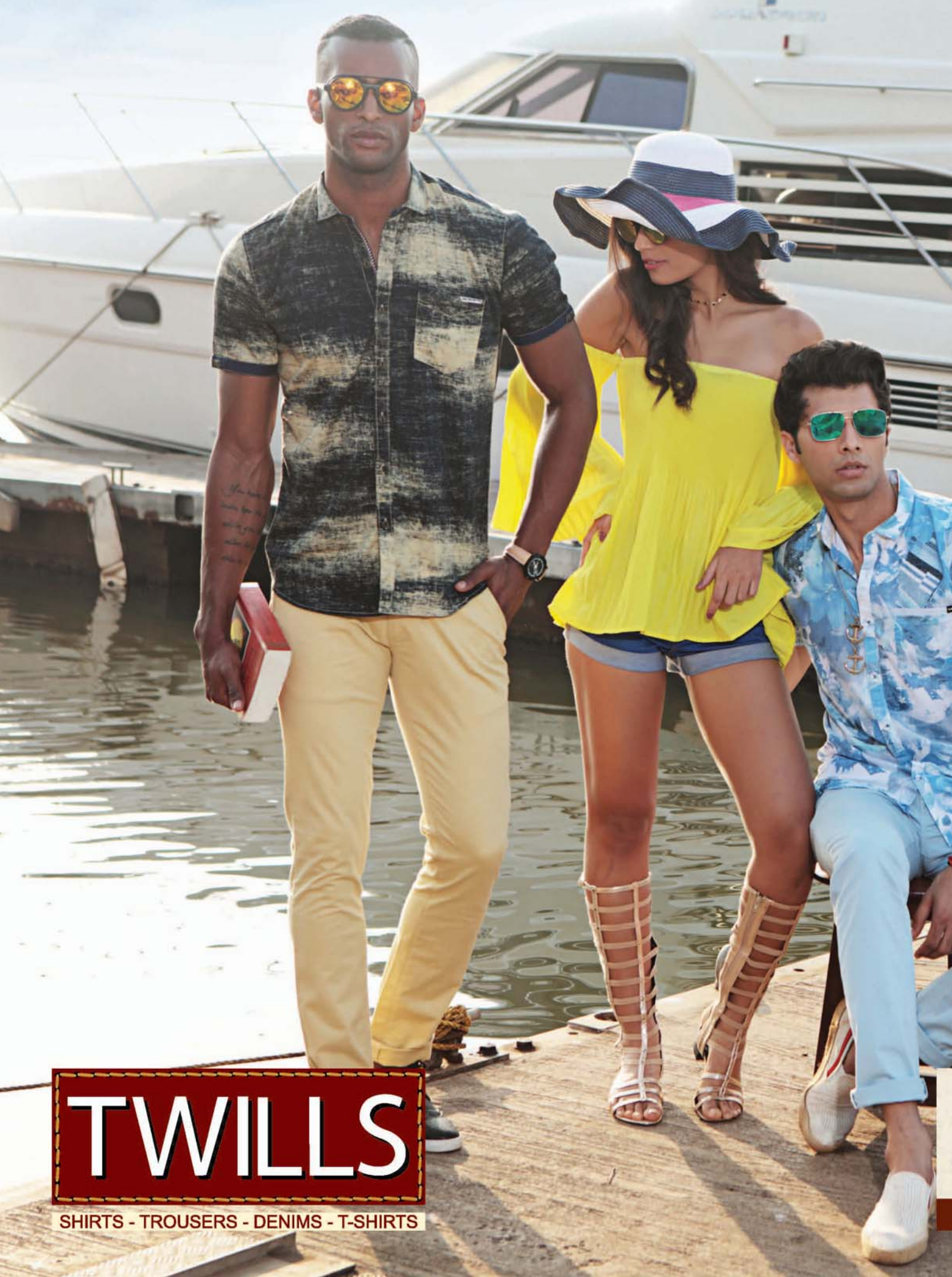
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