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IMAGES Retail™

Future of Businesses

NOVEMBER 2017

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INDIA'S FOOTWEAR INDUSTRY: PUTTING ITS BEST FOOT FORWARD

FOOTWEAR RETAILERS ON DEMAND
DYNAMICS, PAIN POINTS AND BEST PRACTICES

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The fashion accessories category is a separate market in itself, bringing in considerable amount of capital to the Indian retail industry. It has evolved from being just a functionality to a prime attraction. Of this, the footwear industry is growing at a remarkable pace, presenting Indian retailers and brands with an opportunity to grow and innovate.

Delving deep into the soul of this industry is IMAGES Retail's November issue. We spoke to heads of leading footwear brands in India to zero in on the demand dynamics in India, the competition posed by international brands when they foray into the country and the best practices adopted by them.

We also bring you the detailed interviews with two retail stalwarts – Rahul Vira, CEO, Skechers India, and Inder Dev Singh Musafir, M&B Footwear (P) Ltd. & Vice Chairman - CFLA – Council for Footwear Leather & Accessories.

Vira outlines the history, and retail spread of his brand, while also providing insights into the strategy to drive growth by adopting an Omnichannel approach through online-offline integration and specialty stores – all complemented by facts and figures.

Dev's journey, on the other hand, becoming India's first cult footwear brand is inspiring to say the least. ID – his brand – offers products that are distinct, compared to what is available today in the cluttered footwear market.

And in continuation of our IRF special from last month, we bring you a crisp barometer of the round-tables in which retail hotshots discussed the rapid changes sweeping the industry in India, and also in-depth insights on navigating the future.

We hope that you will find this issue of IMAGES Retail as insightful as the rest. On a concluding note, I would like to remind our readers about the 2018 annual mega congregation of the food retail industry at India Food Forum, which is scheduled for January 17-19, 2018 in Mumbai. We hope to see you there in large numbers.



Amitabh Taneja

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INDIA'S FOOTWEAR INDUSTRY: PUTTING ITS BEST FOOT FORWARD

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Footwear remains a very important industry in India, contributing to not just employment generations within the country but exports as well. The article shares the dynamics of the industry that has suffered setbacks like those of demonetisation and GST in the year that went by



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A crisp barometer of the roundtables in which retail hotshots at IRF and IOF discussed the rapid changes sweeping the industry in India, and also in-depth insights on navigating the future. The Leadership series include sessions from Arvind Internet, VeriHelp, Honeywell, Vinculum, MiNODES, GreyOrange, SureSolutions, Benoy, Microsoft, QOIE and SAP



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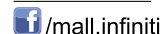
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DIWALI A HAPPY HUNTING GROUND FOR INDIAN RETAILERS

– By IMAGES Retail Bureau

Retailers and brands in India made logical moves in October, which included expansion, strategising and venturing into new domains – including foraying into international markets – to provide their businesses a new way forward.



GODREJ INTERIO'S INDIA CIRCUS EYES ₹100 CRORE REVENUE POST-EXPANSION PLANS



Godrej Interio, the furniture arm of Godrej & Boyce Mfg Co. Ltd, will open nine stores of India Circus, the home store run by designer Krsnaa Mehta. The partnership between Krsna Mehta and Godrej Interio is a matrix of 49:51.



“We work on the strategy of fast fashion where we update our stocks in every three months. We are trying to increase our offline presence for a rapid growth,” said Krsna Mehta, Design Entrepreneur & Visionary, India Circus.

Known for home decor design products, the brand is targeting a 8X jump in its top line over the next three years. The brand opened its first physical outlet in Mumbai in April 2017 in Kala Ghoda. It has recently opened a second one in High Street Phoenix, Mumbai, which is around 1100 sq. ft.

“We decided that pure online or pure offline won't work for India Circus. We are looking ahead to open nine more

EBOs stores by the end of this financial year including in Bengaluru, Chennai, Delhi, Kolkata, and Pune,” said Anil Mathur, Chief Operating Officer, Godrej Interio. The brand is also exploring opening shop-in-shops in 55 Godrej Interio outlets, which will guarantee it a fairly good reach in the offline space. To complete the Omnichannel circle, India Circus is also looking to sell its products on e-marketplaces like Amazon and Snapdeal.

The brand starts with an offering for their products from anywhere between ₹200 and goes up to ₹6000. Its customers range from 18 years to 70 years of age and demographically, the brand is well-liked by consumers of all income groups.

KHADIM INDIA EXPECTS TO RAISE ₹543 CR FROM IPO



Footwear retailer Khadim India, expects to raise ₹543 crore through initial public offer next month, with the company fixing a price band of ₹745-750 per share. Net proceeds from the issue would be utilised towards payment of loans and for general corporate purposes. Axis Capital and IDFC Bank are the books running lead managers to the issue. The firm launched its IPO which opened from November 2-6, 2017 with a price band of ₹745 to ₹750 per equity share of face value of ₹10 each of the company.

At the upper-end of the price band, the IPO is expected to garner ₹543.06 crore. The company was incorporated in 1981 and for several years it was involved in wholesaling and distribution of basic utility footwear. It entered into the retail business in 1993. As on June 30, 2017, it has 853 retail store outlets in across 23 states and one union territory in India.



LUX INDUSTRIES LOOKS TO EXPAND EXPORTS THROUGH FOREIGN TIE-UPS

Innerwear maker Lux Industries, which exports leading brands like Polo and Byford, is scouting around to expand its export portfolio. The company, which has set up German knitting, Italian cutting and Japanese stitching machinery at its Dankuni plant here, wants to leverage its additional capacity to tie up 'license manufacturing' agreements with global brands.



"We are leveraging this plant for exports. We have a license from the UK based brand Byford and South African based brand Polo for manufacturing their products. We are in search of more foreign brands to get a licence for manufacturing and exporting to them. Our production capacity has also increased by five lakh pieces per day leading improved margins," said Saket Todi, Senior Vice President.

The company has consolidated its manufacturing units across Kolkata and surrounding areas into the integrated Dankuni plant to reduce overheads. The innerwear major has 11 manufacturing facilities across Ludhiana, Tirupur, Delhi, Ghaziabad, and Dankuni with a total capacity of 14 lakh pieces a day.

"Our yearly exports turnover stood at about Rs 110 crore and is growing. We are experiencing good demand and therefore we are exporting to more than 140 countries. The brand constitute about 65 percent of export revenue while the rest is from licensed brands," said Udit Todi, the other Senior Vice President.

BEING HUMAN CLOTHING CELEBRATES 5 SUCCESSFUL YEARS IN FASHION RETAIL

Being Human, A Clothing Line with a Heart, is all set to celebrate the completion of 5 successful years in the fashion retail industry. The brand was launched by Salman Khan and its global licensee, The Mandhana Retail Ventures Limited in 2012.

After a successful launch in Europe, the brand was subsequently launched in the Middle East, India, Nepal, and Mauritius over the past 5 years and currently has more than 600 point-of-sale globally. The brand has received global acceptance due to its unique model wherein through the sale of each garment, the brand supports the education and healthcare initiatives undertaken by Being Human - The Salman Khan Foundation.

Known for its trendy design, Being Human has marked its position among the top apparel brands in India and overseas. This fast-moving

fashion brand is an interesting mix of creativity and functionality supported by cost-effective product development. Taking the brand



ethos forward, the clothing line has made a distinct identity for itself in the retail industry by employing one differently-abled employee as a fashion consultant in each of its stores.

INTERNATIONAL PLANS FOR INDIAN LEATHER BRAND NAPPA DORI

Nappa Dori, the homegrown luxury handmade leather brand opened its first warehouse in India. "We just opened our first concept store called the Nappa Dori warehouse, which is an experiential retail space with a proper cafe, 'Cafe Dori.' I feel the next logical step for us would be to take this brand international and see how we are placed in the international market," said Gautam Sinha, the brain behind the brand told IANS.

"We always believe in experimenting with new products and materials, and soon we are launching a series of new home decor products, along with a new category called 'Objects by Nappa Dori,'" he added.

Sinha who collaborated with Chivas Regal to design 'Chivas Nappa Dori limited edition pack,' said that they have been working with the brand for over the past two



years to create something which is away from the usual take on how cases are done. The limited-edition pack evokes a sense of nostalgia with contemporary products. "The fact that they chose us to design a limited-edition case, and moved away from the usual suspects 'fashion designer' and gave a product design brand like ours a chance, says a lot about how they view the changing landscape in India and how design is not just limited to fashion anymore," concluded Sinha.



WHAT INTERNATIONAL RETAIL HOUSES ARE DOING TO STAY RELEVANT

– By IMAGES Retail Bureau

The retail industry is a tough battleground, where only the innovative survive. Here's what some of the top retailers are doing internationally to drive traffic – they're providing value added services and converting shopping into a social experience. Some are merging traditional retail with latest technologies to take their in-store experience to a whole new level.



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JOHN LEWIS LAUNCHES CONCIERGE STYLE SHOPPING EXPERIENCE



In October 2017, John Lewis launched a concierge-style shopping service as part of wider plans to reinvent its department stores. The initiative has been introduced at its new store in Oxford.

Around one-fifth of the floor space of the new Oxford Store has been dedicated to 21 services and experiences including brand new services such as a free personal styling service for men, free technology training workshops to help customers get the most out of their purchases and learn about the very latest technology, as well as John Lewis's first express Nail and Brow bar. The 120,000 sq. ft. shop has dedicated one fifth of its floor space to services and experiences, including a new 'experience desk', which will be managed by John Lewis' first brand experience manager.

The 322-strong staff recruited to work at the new shop have been given bespoke 'theatre training' by The Oxford Playhouse to teach them the art of outstanding service. They have been taught voice and body language skills used by actors to help them confidently deliver great customer service in their own authentic way. They will also trial a new uniform, created by John Lewis' in-house fashion team.



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COACH TO CHANGE ITS NAME TO TAPESTRY



Coach Inc., the iconic New York purveyor of leather goods, is changing its corporate name to Tapestry Inc., a bid to broaden its image after acquiring the Kate Spade and Stuart Weitzman brands, according to news agency IANS.

After a long search for the right moniker, Tapestry is said to reflect the expansion into a multi-brand firm, said the company in a statement. "We are now at a defining moment in our corporate reinvention, having evolved from a mono-brand specialty retailer to a true house of emotional, desirable brands," Victor Luis, Chief Executive Officer said in a company release.

The new moniker will take effect at the end of the month. However, the company says that for consumers, nothing will change at all.

CALVIN KLEIN TO OPEN MULTI-BRAND LIFESTYLE STORES IN SHANGHAI AND DÜSSELDORF

 Calvin Klein Inc., a wholly owned subsidiary of PVH Corp. has announced the opening of new Calvin Klein multi-brand lifestyle stores in Shanghai, China and Düsseldorf, Germany. Each store is a flagship and features the brand's latest retail design concepts. The 6,000-sq. ft., two-story Shanghai store is located in Raffles City and offers men's and women's CK Calvin Klein, Calvin Klein Jeans, Calvin Klein Underwear and Calvin Klein performance apparel and accessories. The new store in Düsseldorf is located on Königsallee Boulevard and spans three floors and over 3,500 square feet, and offers men's and women's Calvin Klein sportswear and accessories, Calvin Klein Jeans, Calvin Klein Underwear and Calvin Klein Swimwear.

The new design concept for each of these retail locations



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communicates the brand's minimal, modern aesthetic with a fresh addition of color and sumptuous materials to enhance the consumer experience. Vibrant cobalt blue curtains frame the entrance, while geometric-shaped lush rugs in soft pink set a luxurious tone and contribute an elegant counterpoint to the gray concrete. Kvadrat/Raf Simons fabric is utilised throughout as well as Utrecht chairs by Gerrit Thomas Rietveld,

which are distributed by Cassina. Oversized silhouette cut-out images of models in the brand's latest styles are suspended from the ceiling, delineating spaces and communicating the product story of the store.

Digital technology is also utilised throughout the stores, offering consumers the opportunity to actively participate in a personalised shopping experience and engage with the products and the brand in new, unique

ways. Interactive video and denim fit guide walls allow consumers to browse items featured in the brand's current campaign and make selections to try on in-store.

In the Shanghai location, an interactive video table invites consumers to explore the brand on a deeper level via newspaper, magazine and online articles on the brand, key milestones, runway show videos and recent events, as well as the brand's official social media platforms.

"Our new flagship stores in Shanghai and Düsseldorf represent Calvin Klein's commitment to strong consumer experience, technological innovation, and unmatched brand equity for our global audience," said Steve Shiffman, Chief Executive Officer, Calvin Klein, Inc.

"As we continue to focus on expanding Calvin Klein's global footprint, it is our objective to bring a best-in-class retail experience to key markets and shopping destinations around the world," he added further.

H&M GROUP INVESTS IN NEW RECYCLING TECHNOLOGY COMPANY

 H&M Group, parent company of leading Swedish fashion retailer H&M, has taken a minority stake in Swedish company re:newcell to help speed up its transition to a circular business model. re:newcell uses a new technique to recycle used cotton, viscose, and other cellulosic fibers into a new, sustainable dissolving pulp. In turn, this pulp can be used to make new textile fibers and fed into the textile production cycle.

The investment will help H&M achieve its ambitious goal of using 100

percent recycled and other sustainably sourced materials by 2030.

"re:newcell's technology has the potential to become a commercial and scalable solution for the industry and accelerate the journey from a linear fashion industry towards a circular one," Cecilia Brännsten, Acting Environmental Sustainability Manager, and Circular Economy Lead, at H&M Group said in a statement. "I am proud that H&M group sees the advantages of our innovation," said Mattias Jonsson, CEO of re:newcell. "Together we can contribute



Alexander Tolstykh / Shutterstock.com

to changing the way fashion is produced and recycled," he added. In order for the H&M Group to move to a circular business model, it must find solutions to substitute

the fibers it currently uses with recycled fibers or other sustainably sourced alternatives, which is why the group is working with numerous initiatives.

At its plant in Kristinehamn, Sweden, re:newcell uses both used clothes and residues from textile production to create new fibers, decreasing the amount of textiles dumped in landfills. Its plant features a closed loop production system for chemicals and water and uses renewable energy and is able to produce 7,000 tons of pulp per year, with additional units being planned.

GUCCI GOES FUR-FREE

 In a game-changing move towards ending fur trade, global fashion house Gucci announced it will no longer use animal fur, beginning with its spring summer 2018 collection. The move has been welcomed by organisations like Humane Society International (HSI), The Humane Society of the United States (HSAS), and LAV-members of the Fur Free Alliance (FFA), a coalition of more than 40 animal protection organisations working together to end the fur trade.

Marco Bizzarri, President and CEO, Gucci, announced the fur-free policy during the 2017 Kering Talk at the London College of Fashion in a statement. Its fur-free policy includes mink, coyote, raccoon, dog, fox, rabbit, and karakul (otherwise known as Swakara, Persian lamb or astrakhan) and all other species specially bred or caught for fur. Kitty Block, President of HSI said, "Gucci going fur-free is a huge game-changer. For this Italian powerhouse to end the use of fur because of the cruelty involved will have a huge ripple effect throughout the world of fashion.

"A staggering one hundred million animals a year still suffer for the fur industry, but that can only be sustained for as long as designers continue to use fur. So, we commend Gucci's compassionate decision, and for helping to ensure that the future of fashion is fur-free." Gucci's President and CEO, Marco Bizzarri said: "Being



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socially responsible is one of Gucci's core values, and we will continue to strive to do better for the environment and animals. "With the help of HSUS and LAV, Gucci is excited to take this next step and hopes it will help inspire innovation and raise awareness, changing the luxury fashion industry for the better." The HSUS and LAV will continue to support Gucci in identifying and reducing its impact on animals and the environment. The company joins many other leading fashion brands and retailers like Armani, Hugo Boss, Yoox Net-a-Porter, Stella McCartney and more in going fur-free, and will be part of the international Fur Free Retailer Program.

Joh Vinding, Chairman, FFA said, "For decades, animals in the fur industry has been subjected to intense cruelty, living their entire lives in miserable, filthy cages. Gucci's new fur free policy marks a game-changer for the whole luxury fashion industry to follow. Gucci is taking a bold stand for animals, showing the world that the future of fashion is fur-free."

IKEA INTRODUCES FURNITURE RANGE FOR PETS


 IKEA, the Swedish furniture retailer, has recently launched a home collection for dogs and cats, designed in the brand's signature clean, minimalist style. The Lurvig collection, named after the Swedish word for 'shaggy', includes tiny beds, cushions, collars, food dishes and even a miniature fold-out sofa. The Lurvig collection was designed by Inma Bermudéz, who felt there was a gap in the market for reasonably priced but nice-looking pet products.



Alex Millauer / Shutterstock.com

When developing the collection, the Valencia-based designer worked alongside vet Barbara Schäfer to make sure that different behaviours types and habits were being accounted for. Bermudéz's 62-piece collection covers the basic areas of sleep, eat, play, travel and walk.

NIKE TO FOCUS ON 40 RETAIL PARTNERS

 Mark Parker, CEO, Nike announced at the annual Investor's Day summit that the company will focus its efforts on just 40 key retail partners. The company currently has 30,000 retail partners with 110,000 points of distribution. The change comes as Nike prioritizes direct-to-consumer sales through its website, apps and Nike-branded retail stores, as well as the 40 select retail partners. Those partners will be those who are willing to create a unique, branded Nike space within the store and have specific Nike-trained employees to assist with sales.

Nike's plan is to make this shift over the next five years. The rest of Nike's retailers will not be shed - at least not immediately. Still, Nike clearly expects some of its retailers to drop out, or go out of business. The company is also drastically ramping up its online efforts and hopes to get 30 percent of its revenue from e-commerce by 2022 - up from 15 percent what it is at present.



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GINESYS: A COMPREHENSIVE RETAIL ERP SOFTWARE FOR THE MODERN RETAIL VALUE CHAIN

– By Images Retail Bureau



The benefits of implementing ERP solutions are endless, although its main function is to improve business performances. ERP systems provide valuable information as well as increases operational efficiency, modernises inventory, generates extensive reports on sales, purchases, and inventory positions...

The retail industry across the globe is growing at a fast pace and to survive the current and expected growth in the business, many organisations are on the look out for a software that can

manage all operations in an efficient manner.

One such efficient system that retailers can use is the Enterprise Resource Planning (ERP). ERP is a business process management software that allows an organisation to use a system of integrated applications

to manage their business and automate many back-office functions related to technology, services and human resources. Many retail companies have found ERP solutions efficient in handling existing processes for them.

The benefits of implementing ERP solutions



GINESYS USPs

- **Specialised Solution Verticals:** apparel, accessories, lifestyle and supermarkets.
- **Flexible Solution:** Caters to production, wholesale, retail and accounting.
- **Scalable Solution:** Has the capability to handle 100+ stores (Eg. V-Mart 140+ stores). Handling 450+ retail touchpoints for Manyavar
- **Research & Development:** An in-house R&D team in Kolkata, which develops new features using latest technology to deliver an off-the-shelf, robust product.
- **Rapid Implementation:** Designed to be retail specific, making implementation fast and smooth.
- **Reliable Support:** Ginesys has its own dedicated support team which provides both web and phone-based assistance. As a result, the company has 99 percent customer retention and 100 percent satisfaction rates.

are endless, although its main function is to improve business performances. ERP system provides valuable information as well as increases operational efficiency, modernizes inventory, generates extensive reports on sales, purchases, and inventory positions.



EasemyGST

Solving GST

The implementation of GST has led to several hurdles for retailers and brands and in order to solve these problems, Ginesys has also rolled out EasemyGST, a GST return filing solution, which is fully integrated.

“EasemyGST is an online platform to provide GST compliance technology infrastructure to businesses & assisting them in adapting to the new GST era. It uses the latest technology to provide cloud and mobile-based applications which are synchronised with the government’s GST portal, to standardise and streamline all the tax work of the enterprises,” says Lohia.



“You can upload invoices - both automatic (via ERP Integration) and manual (via Excel) options available, reconcile invoices, file your GST returns, manage your vendors and customers, view detailed GST Reports and so much more on EasemyGST. Add multiple GSTIN using a single account and manage all your business activities easily at the same place, using an interactive user-friendly dashboard. Online filing of returns, maintenance of all the filing data and mismatch reconciliation, everything will be seamless and effortless,” he adds.

EasemyGST is India’s first end-to-end GST compliance provider, i.e. right from ERP integration to return filing. **IR**

BENEFITS OF IMPLEMENTING ERP

- Increases operational efficiency and modernises inventory which helps in reducing errors as the whole process is highly automated.
- Better utilisation of resources
- Fast billing, smaller queues at POS
- Perfect time accessibility of information will help companies to make better and effective decisions.
- Generates extensive reports on sales, purchases and inventory which help companies expand areas of operation and easily get connected with targeted audiences that further result in maximising sales and profits.

ERP solutions also help avoid data thefts, vendor frauds and errors in administration, finance and accounting reports, which may occur when handled manually. This kind of retail software is crucial for businesses to excel in today’s competitive market.

One such ERP provider is Ginesys - an enterprise product solution for the retail value chain from manufacturing to retail POS.

“We provide retailers with a specialized solution, a ready-to-use product. No customization is required. It is India’s only home-grown product solution which caters to all retail business formats. All the updates provided by the R&D team are focused and dedicated to the vertical for which the ERP is made. The implementation from our end is fast and we also provide extensive support once installed,” says Prashant Lohia, CEO, Ginesys.

Ginesys focuses on providing solutions to apparel retailers, lifestyle retailers,

consumer goods retailers, manufacturing segment as well as supermarkets.

The company steps to the fore with an end-to-end retail enterprise resource planning solution, and allows businesses to automate the entire business operations in the retail value chain right from manufacturing to wholesale and retailing of the product. The solutions offered by Ginesys helps retailers and brands take care of the different business formats like MBOs, EBOs, franchisee stores, SIS and online retailing.

“We have more than 500 + happy and satisfied customers nationally. Given the fact that businesses which are looking to scale up typically implement Ginesys retail POS and ERPs, it comes as no surprise that our user base is now more than 10,000 strong. If you are looking for a flexible, scalable and a stable one-stop solution for whole retail value chain from planning to point of sales, this is it,” says Lohia.

INDIA'S FOOTWEAR INDUSTRY: PUTTING ITS BEST FOOT FORWARD

– By Zainab S Kazi

Footwear remains a very important industry in India, contributing to not just employment generation within the country but exports as well. Today, India is the second largest producer for footwear in the world, just behind China.

Hollywood mega star Marilyn Monroe once said – “Give a girl the right shoes and she can conquer the world.” And that may well be true, since there are no two thoughts about the fact that footwear remains a very important industry in India, contributing to not just employment generation within the country but exports as well. Today, India is the second largest producer for footwear in the world, just behind China. Given a boost, the country can most certainly surpass China and become the largest footwear producer in the world.

Setting the context of the story, Farah Malik, Managing Director & Chief Executive Officer, Metro Shoes Ltd – one of the most respected footwear brands in India – shares the dynamics of the industry that seems to have suffered some setbacks in the year that went by.

“The footwear segment continues to perform well in India. The market, however, has seen some significant disruptions in FY 16-17. The majority of the Indian footwear market is still unorganised, accounting for 70 percent of the market. With events such as demonetisation and GST, this segment has been under significant strain this year. The organised segment has experienced growing competition from the international brands expanding their footprint within India,” she says.

Hitting the nail right on the target, Anupam Bansal, Executive Director, Liberty Shoes Ltd., talks about the dynamics of the footwear industry in India. “Footwear market is pegged at an interesting stage currently. On one hand it is experiencing growth with the consumer shift towards the



branded footwear and on the other end as an industry we are struggling under the impact of GST. It is hoped that the government will address the issues raised by the industry and things will smoothen out. Government of India has already commenced the "Make in India" campaign which has been proving beneficial in boosting manufacturing in India. But there are tons of discrepancies and bottlenecks when it comes to boosting manufacturing. Government should facilitate the private sector with adequate infrastructure facilities, space for malls and retail formats (MBOs & EBOs), implementation of GST tax has remove the inequality in the tax payments amongst states and cities and improvement in the logistic system. This does promises a secure future on financial front. Being a part of this process of improvement of the country is a proud moment for Liberty. Overall it seems to be on a positive path and the interest amongst the newer generation in the business and the upgrading of the retail chains will see a further boom in the industry."

On the evolution of the industry in the last five years, he adds, "We are experiencing the shift from unorganised market to the organised market which is led by the consumers themselves which has been a very good trend. This has encouraged the industry to build on newer technologies and introduce better products. There has been a massive improvement in the retail sector with the organised brand investing in company owned stores and hence ensuring a better delivery and promise to the consumers. Due to the ever-increasing internet penetration and adoption of internet and the overall ecosystem for e-commerce falling in place, the last decade has been the best for this industry."

Inder Dev S Musafir, Director, M&B Footwear (P) Ltd. & Vice Chairman - CFLA - Council for Footwear Leather & Accessories, points out, "2017 undoubtedly can be considered as the milestone year for the footwear industry. The largely unorganised sector is for the first time witnessing the impact of discipline towards tax compliance under the GST format. The unfortunate thing is that the government for some reason still

considers Footwear as a luxury product, and therefore it has been slapped the very high 18 percent slab of GST. Through the platform of CFLA - Council for Footwear Leather & Accessories we have been representing our case to the Finance Ministry for equating footwear at par with apparel in terms of Tax imposition."

Sahil Gupta, Director, Helios points out that the increase in the demand for footwear can be attributed to the fact that customers do not consider footwear as a utility anymore. He says: "It is a fashion statement, and this is the reason buying shoes for special occasion has become a norm. All of this has resulted in increase in per capita consumption increasing from 1.6 to 2.4 in the past 5 years."

Demand Dynamics

Woodland, an iconic brand carved a niche for itself with its chic range at a time when the Indian footwear industry did not have the trend of international brands wooing Indian customers. Woodland's parent company, Aero Group, has been a well-known name in the outdoor shoe industry since the early 50s. Founded in Quebec, Canada, it entered the Indian market in 1992.

Highlighting the market share of men, women and kids footwear, Harkirat Singh, Managing Director, Woodland says, "The men's market is growing at a CAGR of 10 percent. At present, men's market contributes around 60 percent of sales in the footwear segment as compared to the women's share of 30 percent. The women's segment, however, is growing at a much faster CAGR of 20 percent. In case of kids, athletic shoes have captured the biggest share, and though the segment is growing it is doing so at a comparatively smaller rate."

On the demand dynamics, Malik adds, "There's no question that sneakers have taken over the fashion limelight for both men and women. There are myriad factors fueling momentum today, including celebrity-powered collections that are driving new customers, cool collaborations between designers and retailers, and a growing crop of social media influencers sparking excitement. In addition, the athleisure and working

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– Farah Malik,
Managing Director &
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“Footwear market is pegged at an interesting stage currently. On the one hand it is experiencing growth with the consumer shift towards the branded footwear and on the other end as an industry we are struggling under the impact of GST.”

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Executive Director,
Liberty Shoes Ltd.



“The footwear industry has evolved into a highly specialised industry, where machine production with a systematic workflow has got the mass industry to an international level.”

– Sagnik Banik, Ajanta Footcare (India) Pvt. Ltd

women’s category are growing rapidly.”

Malik elaborates on dynamics being witnessed in the women’s category saying, “With more women entering the workforce, the formal wear category is showing good growth. With additional disposable income women are spending more on formal and casual wear. The category showing less than average growth is in stilettos as comfort is still a paramount factor. Earlier, younger women would wear stilettos as a fashion statement. Today, fashion is more focused around the casual segment such as sneakers.” She adds on the kid’s category stating, “Kids as a category has enormous potential, but currently is not a significant share of our sales.”

As for the regional demand variation, according to Malik, ‘South India is the stronghold of practical comfort whereas the North will see a demand for colors and high fashion. Platforms and wedges are a must in Kolkata and the North-East wants casual and trendy styles. As western culture creeps in however, there is also a nationwide demand for certain types of products, such as brogues for men, sneakers or platform wedges for women, that does well in all markets.”

“Today it is about a status symbol, a fashion statement. Now, proper research and understanding on consumer’s needs and desires requires to be given a lot of weightage.”

– Prem Dewan, Retail Head, OSL Luxury Collections Pvt. Ltd.,

Sagnik Banik from Ajanta Footcare (India) Pvt. Ltd makes an interesting point when he says that in the footwear industry, brand loyalty plays a huge role, and this has led to a segmentation of the industry zone wise with the zone leader having more than 50 percent market share. “The footwear industry has evolved into a highly specialised industry, where machine production with a systematic workflow has got the mass industry to an international level,” he adds.

Saggar Mehra, Creative Director, brand Sunil Mehra, attributes the rise in the demand for footwear due to the changing and evolving lifestyle of Indians. He says, “The rising demand of footwear in India has a lot to do with the changing lifestyles and an increase in the number of working professionals. The men’s footwear market contributes around 60 percent of sales in the footwear segment. The CAGR of men’s footwear accounts for about 10 percent. With increasing demand in not just Tier I cities, but also in Tier II and III cities, the Indian footwear market is rapidly evolving and expected to grow at a higher rate in the future.”

“2014-15 has been a revolutionary phase for

“In Andhra Pradesh and Tamil Nadu, we have demand for sizes up to 14 for men’s footwear. Chennai was predominantly a chappal wearing city and the industry together is doing its bit to change this.”

– Sushanto Dey, Partner, Sreeleathers,

“Together with foreign origin brands, Indian brands ran through significant improvement becoming successful to pose a stiff competition against their foreign counterparts.”

– Harkirat Singh, Managing Director, Woodland



the footwear market in India. During this phase the revolution in footwear designing made wearing branded sandals and other varied designs are not just accepted but have taken a place of being called as fashion statement pieces. Adoption of new technologies and higher quality fabric and techniques of constructing the shoes has been

fascinating too,” he adds.

Prem Dewan, Retail Head, OSL Luxury Collections Pvt. Ltd., Corneliani, feels that the industry has gone through a substantial change in the past 5 years, from just being a need based product. He says, “Today it is about a status symbol, a fashion statement. Now, proper research and understanding on consumer’s needs and desires requires to



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“2017 undoubtedly can be considered as the milestone year for the footwear industry. The largely unorganised sector is for the first time witnessing the impact of discipline towards tax compliance under the GST format.”

– Inder Dev S Musafir, Director, M&B Footwear (P) Ltd. & Vice Chairman - CFLA – Council for Footwear Leather & Accessories

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He adds, “Today it is about a status symbol, a fashion statement. Now, proper research and understanding on consumer’s needs and desires requires to be given a lot of weightage. This is the key for any brand to sustain in the market.”

According to Sushanto Dey, Partner, Sreeleathers, people in eastern India have a smaller feet size with the maximum being size 10 for men. He shares, “In Andhra Pradesh and Tamil Nadu, we have demand for sizes up to 14 for men’s footwear. Chennai was predominantly a chappal wearing city and the industry together is doing its bit to change this.”

The Foray of International Brands

Anything that is international excites Indians. While there may be exceptions to this rule, but none of them apply to fashion. International brands have a fantastic pull factor for consumers, then be it for footwear or apparels.

Reiterating this, Singh says, “The inclination of Indian consumers towards international brands has become pertinent. After



liberalisation, as the economy opened up to the international market, imported goods gradually gained traction among Indian buyers. In recent years a huge number of international brands have gained a good and reliable position in the market. Together with foreign origin brands, Indian brands ran through significant improvement becoming successful to pose a stiff competition against their foreign counterparts.”

One may be surprised to know that the competition from international brands isn’t only from the ones that are solely into footwear, but according to Malik, even brands like Zara and H&M are seen as strong competitors.

Sushanto feels that the penetration of international brands is low and is seen only in the metros. He shares, “They will need about 10 years to understand India.”

Premium luxury international footwear brands are also foraying into India. The Dar Group has launched Berleigh, a luxury multi-brand footwear and accessories retailer in the country which will be bringing together the finest products from celebrated brands around the world.

Shashank Arya, Executive Director, The Dar Group, says, “Berleigh houses different types of brands from elegant and suave Andrés Sendra (Spain) masterpieces to modern and charming, yet

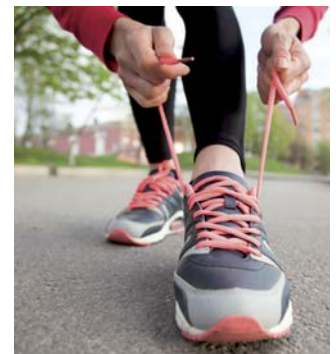


quirky shoes from Duke + Dexter (The United Kingdom) or luxurious shoes from Magnanni (Spain) and Schutz (Brazil). It brings strong fashion information on its products as well as offering great prices.”

Elaborating on what led him to launch Berleigh in the country, he states, “Heel & Buckle Pvt. Ltd. ran successfully for three years, and was looking at expanding and introducing newer brands in the Indian market. That is when we at The Dar Group decided to join hands with them in 2016. And that is how Heel & Buckle Luxury Pvt. Ltd. was found as a subsidiary to The DAR Group.”

Berleigh is being positioned as a bridge-to-luxury space that houses different brands from different parts of the world. Arya adds, “Our prices and craftsmanship is better than the high-street brands and our prices are lower than luxury brands.”

Berleigh currently has its flagship store in Fort, Mumbai



and another one in Delhi at the Ambience Mall in Vasant Kunj.

ASICS India launched Japanese brand Onitsuka Tiger in the country recently. This brand is a sport-inspired fashion brand that has designs ranging from updated classics to refreshing new styles and collaborations with like-minded artists.

Rajat Khurana, Managing Director, ASICS India Pvt. Ltd. says, “We have partnered with Burgundy Hospitality in India for the distribution and operations to launch Onitsuka Tiger first-ever-mono-brand store in India in the Palladium

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Distribution Redefined

“The number of walk in’s in the malls will definitely vary from that on the high streets since the malls are designed for a more of a complete family experience.”

– Anshu Kumar, Director, Rika Lifestyle Pvt Ltd

Mall, Lower Parel, Mumbai. Going forward, we will focus on establishing mono-brand stores in the country under a partnership with franchisees. These stores will be one of our key channels to drive up sales. Eventually, we will be ramping up distribution of products through regional distributors and e-commerce portals.”

Footwear Retailing – Mall vs. High Street

With the advent of malls, shopping dynamics have taken a 360 degree turn in India. No one would have thought that people would buy shoes from a mall and that footwear retailers would occupy a good space in malls across the country. From Crocs to Clarks and Indian brands like Inc.5 to Metro Shoes, all have a healthy presence in malls throughout India.

Elaborating on the mall phenomena, Malik says,



MALL STORES: THE GOOD & THE BAD

- ▶ Malls are better organised and offer better infrastructure; air-conditioning, ample parking, food courts, etc., all of which is a welcome break from the chaos of high street Indian shopping
- ▶ Malls are a haven when it comes to offering choice. A wide range of brands, including multi-brand outlets can be found under one roof, which allows the bargain conscious Indian shopper to compare prices.
- ▶ With their multiplexes, amusement areas, food courts, and promotional events, malls are big on entertainment and have increasingly become a go-to destination for all age groups.
- ▶ Of late, Indian cities are seeing a case of ‘too many malls, nowhere to shop’ due to malls being built without in-depth understanding and research.
- ▶ Mall space is getting more and more expensive, with some even demanding a percentage share of the sales revenue.

HIGH STREETS: THE GOOD & THE BAD

- ▶ With more space available and greater opportunities for customisation, high streets are a perfect choice for flagship stores.
- ▶ Established brands prefer the visibility and cachet of high streets, but a presence in upscale malls is also a business necessity.
- ▶ Standalone stores give shoppers a more personalised experience that is missing from the homogenous nature of malls.
- ▶ Premium high streets tend to be more expensive than malls and do not guarantee sales per square feet. Khan Market in Delhi and Linking Road in Mumbai are amongst some of the most expensive retail locations in the world.
- ▶ There’s a rising trend of luxury brands moving from 5-star hotels to high streets. Old heritage properties that can do with some retrofitting are becoming precious real estate assets, for example, Hermes and Christian Louboutin have set up standalone stores at the historic Horniman Circle in Mumbai.

Courtesy: Farah Malik, Metro Shoes Ltd.

“Footwear is the fastest growing category for HRX. From 16 percent contribution last year to 25 percent contribution to revenues this year, it is going to become the leading category for the brand.”

– Afsar Zaidi, Co-Founder & CEO of HRX

“Shopping malls are a relatively recent phenomenon in India. The delightfully chaotic, colourful and bustling Indian bazaars have dominated the retail landscape for the longest time. As brands evolve and consumer behaviour slowly shifts from need-based shopping to that of retail therapy, Indian retail too is witnessing a quiet tug of war between the high streets and malls. While at some places, brands are shifting from the cluttered high street environment to malls, certain prominent retailers are purposefully avoiding malls to stand out from the crowd.”

Anshu Kumar, Director, Rika Lifestyle Pvt Ltd shares an interesting point with regards to the advantages a brand has when they are present on a high street. “The number of walk in’s in the malls will definitely vary from that on the high streets since the malls are designed for a more of a complete family experience. On the other hand, the stores at the high street are able



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to play a lot more with the presentation as in most of the cases they have more retail space comparatively which allows them to utilize a lot of area to work on display and marketing and in this case the Brand pull plays an important role.”

Key Brand Dynamics

Metro Shoes currently has 397 company managed outlets occupying 5.2 lakh sq. ft. of retail space. The average size of each store is approx. 1000 sq. ft. This goes to show that this industry has a fantastic growth opportunity for brands that take their business seriously. This particular brand has stood the test of time and has set an example for other brands to follow. Little surprise then that Crocs has partnered with them for exclusive retailing of their brand at Metro and Mochi stores apart from their own stores.

Talking about Crocs, the brand is looking at expanding to over 250 stores from the current 58 stores by the end of 2020. In one of the recent news article on the brand, it was reported that it has cornered over 10 percent share of the total market size in the organised non-leather, non-sports casual footwear segment. In the year 2015, they sold 900,000 pairs of shoes, which went up to 1.5 million in the year 2016.

Elaborating on the presence of Metro Shoes across India, Malik states, “We are currently present in 101 cities across India with a varying number

Style Speak:

- Men: Evergreen styles include brogues, derbys, moccasins and loafers. A pair of leather chappals is a must-have in every man’s shoe closet
- Women and evergreen fashion? That’s an almost impossible question. However most women will have a regular use sandal, ballerina and pump in their shoe closet.
- In kids, sandals for boys and girls are a mainstay.

Courtesy: Farah Malik, Metro Shoes

- A cool printed hawai with shorts or tights.

Courtesy: Sagnik Banik, Ajanta Footcare (India) Pvt Ltd

- Brogues and Oxfords in men and sneakers for kids are a must have and will always remain in vogue as they not only speak of style but also are supremely comfortable and classy. For women, a nice pair of ballies in neutral colors can never go out of fashion. Be it with a LBD or a basic trouser one can always look elegant and classy without compromising on comfort.

Courtesy: Sagar Mehra, Creative Director, Sunil Mehra

of stores in each location depending on the intensity of demand. Tier I cities obviously have a greater volume of stores with an average of 25; Tier II cities have between 6-12 stores; and Tier III cities can have between 1-4 stores depending on the market.”

A relatively new entrant, brand HRX which has Bollywood actor Hrithik Roshan as its face for the brand has been actively capturing the men’s sportswear market in India.

According to the Afsar Zaidi, Co-Founder & CEO of HRX, “Footwear is the fastest growing category for HRX.

From 16 percent contribution last year to 25 percent contribution to revenues this year, it is going to become the leading category for the brand. We started with 20 styles at the time of launch and today we have almost 250 styles across running, training and casual shoes category.”

Zaidi says sportswear as a category is dominated by the men’s market. He adds, “Sports/active footwear contributes to about 7 percent of the overall industry. The growing demand for comfortable and athleisure shoes are bolstering the footwear industry.”

And then there is Woodland, which has over 600 COCO stores across 50 cities in India and covers a total retail space of around nine-lakh sq.ft. The average size of a Woodland store

is 1,500-2,000 sq.ft. The brand has yet not taken the franchise route!

Revealing the reason for this, Singh shares, “It is very easy to grow through the franchise route, but quality is important in retail. By having our own stores, we can project the brand much better and keep the staff as per our requirements. So, we have taken a general call not to expand through franchisees.” In terms of retail expansion, the brand has grown more than 30 per cent on their exclusive outlets at present to 600 with aggressive focus on Tier II and III cities.

With a presence in six states covering the Eastern part of India, Ajanta Footwear today has presence across 100 stores, out of which 70 percent are company owned. Banik says, “We are a mass brand with stronger dealer network and our presence is only in high streets with a mass market in focus. We also have our own portal, ajantashoes.com that started this year and the response we have received is overwhelming.”

Meanwhile, Rikka lifestyle’s brand Flipside has 205 stores out of which 200 are MBOs and 5 are EBOs which are spread across Hyderabad, Bangalore, Delhi, Gurgaon, Jalandhar, Chennai, Lucknow, Ahmedabad, Raipur, Mumbai, Pune, Gangtok, Kolkata, Patna, Bhopal, Vizag, Vishakhapatnam etc.





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Challenges & Pain Points

Highlighting the pain points faced by the vendors, Malik does not mince words while saying, “On the supply side, vendors are facing challenges adapting to the GST regime which adversely affects their working capital cycle. Brands will need to be resilient to navigate through this phase of uncertainty.”

According to Singh, “The footwear industry provides a realistic opportunity to implement and sustain the “Make-In-India” program in true spirit. To realize this potential, there is an urgent need to encourage investment in the footwear industry to tide over the dis-economies of scale and loss of competitive edge in the Indian footwear industry.”

Mehra highlights that awareness is one of pain points across the industry. He explains, “People have unprecedented choices when it comes to footwear. It is highly important to be informed on what’s gold and what’s merely

gold plated. The texture, finesse is very important while purchasing footwear, needless to mention good design and shape of footwear.”

The Road Ahead

With the fashion market in India growing exponentially, footwear and accessories are at par with the consumption of apparels.

Singh points out, “In the last five years, Indian footwear export has witnessed a growth of 20 percent owing to growing demands in the European nations and also the trend of major importing countries to shift their focus from China to other producing countries.”

He further states how the footwear industry has grown from a need-based industry to becoming fashion and style oriented. “India annually produces 2.1 billion pairs of which 90 percent are consumed internally. In addition, India is the third largest footwear consuming country in the world, but with very little separating the three, India is very soon expected to be the second largest consumer as well,” he says.

It is interesting to hear Malik share the how footwear has been a trendsetter for other industries to follow. She says, “The footwear market has a high potential for growth considering many international brands in the premium and semi-luxury segment. In fact, the first foreign brand that has a 100 per cent approval in FDI is a footwear brand. We understand that there will be more players wanting to have a piece of the growth trajectory of Indian retail. With increasing competition, we do foresee some short-term crunch be it the



availability of manpower and resources. However, in the long run, we see competition especially International as an efficiency booster. Be it back-end infrastructure, investment in training and front-end staff, and better production processes.”

Musafir concludes encapsulating the dynamics of the industry stating: “The mom-and-pop style of footwear retailing in India will always survive alongside modern retail, as the number of retail points under the

mom-and-pop format are a few hundred times more than modern retail. Online retail of footwear is gaining popularity. However, the inordinate discounting on the part of the portals is detrimental to the long-term equity of a brand. Foreign brands of footwear will do well if they have strong local partnerships with a manufacturing companies, as the quick changing and region wise customer preferences of footwear fashion can only be serviced if the product is Made in India.”

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IHGF DELHI FAIR AUTUMN 2017

WORLD'S
LARGEST HOME
& SOURCING
SHOW OFFERS
MATCHLESS
SOURCING
OPPORTUNITY FOR
INDIAN RETAIL &
E-COMMERCE

– By **IMAGES Retail Bureau**

IHGF Delhi Fair-Autumn 2017 offered an exclusive opportunity for Indian retail brands that strive to step-up their offerings for top-end consumers both for sourcing as well as retailing. It is a platform to conduct business and source export quality lifestyle products of renowned global chains including Target, and IKEA.



After five energy-charged days, the world's largest show for home, lifestyle, fashion & textiles and the only one of its kind, IHGF Delhi Fair, India, signed off splendidly, beating expectations all round.

Certified by the Limca Book of World Records as the world's largest congregation of handicraft exporters, this show is an essential meeting ground for the international gifting and lifestyle products industry. It has taken shape over 44 editions as a sought after sourcing event, encompassing the complete supply chain of home fashion & utility, collectibles, gifting and fashion accessories.

The recently concluded Autumn 2017 edition brought together over 3000 exhibitors with innovative collections confirming to 14 different show sectors.

This upsurge in participants was met with quality buyer traffic and contributed to a substantial amount of order placing and enquiries.

Buyers from all over the world with impressive numbers from USA, Canada, Europe, Australia, South America, Middle East and Asia, thronged the entire expanse of the plush India Expo Centre & Mart, venue for IHGF Delhi Fair. Wide-ranging selections presented by leading export houses at the show inspired buyers to replenish their merchandise and add new product lines for seasons ahead.

Responding to the retail and e-tail advancement in India, organisers of IHGF Delhi Fair, Export Promotion Council for Handicrafts (EPCH), have also opened their doors to domestic volume retail buyers, interior designers and architects. Many of the Indian stores/wholesale buyers and leading e-commerce chains keen to source international quality products within India pre-registered to visit.

EPCH had arrangements for these buyers to visit the fair and meet suppliers as per their requirements. 1300 exhibitors displayed the symbol 'SR' (Source for Retail) who were open to domestic retail buyers. Over 800 domestic volume buyers pre-registered to visit and an additional 1,700 had the opportunity of sourcing at IHGF Delhi Fair.

Domestic volume buyers already patronising the show include IKEA, H&M, Fab India, Lifestyle Stores, Westside, Home Stop, Home Town, Archies, @home, The Good Earth Pvt. Ltd., Godrej & Boyce Mfg. Co. Ltd., The Bombay Store, The Furniture

Republic, DLF Brands Ltd. (Pure Home & Living).

Among e-commerce groups, Flipkart Internet Pvt Ltd, Snapdeal, Pepperfry, Urban Ladder, Ajio.com and many more. IHGF Delhi Fair-Autumn 2017 offered an exclusive opportunity for Indian retail brands that strive to step-up their offer for top-end consumers, besides the global home & lifestyle retail

levels at the state-of-the-art India Expo Centre.

Spring 2018 would see significant expansion in all categories with a promising assortment of creations, varied in inspiration, processes and materials - art metal ware, EPNS ware, wood carvings, furniture & accessories, glassware, fashion jewellery & accessories, hand-printed



with the fact that Indian manufacturers fulfill demand for the exclusive, the handcrafted and the hand embellished. This strength sets IHGF apart and the crucial balance between size and quality of display and number of buyers creates a winning combination, giving unique business value to all trade partners. According to the feedback, visitors always find new accentuations in the showcased themes. Many wholesalers and importers sourcing from India like the work culture of Indian manufacturers.

IHGF Delhi Fair is organised twice every year for Spring and Autumn, by the Export Promotion Council for Handicrafts (EPCH), a non-profit organization and the apex body representing handicraft manufacturers & exporters, pan India. The Council provides comprehensive information about the sector to international buyers and ensures optimal interface with the Indian handicrafts sector, facilitating business.

Among its regular activities, EPCH organizes and leads participation in trade shows, buyer-seller meets, conferences and study tours. EPCH has facilitated its 10000+ member exporters to customize and offer unique styles and quality products to the global sourcing community. Recognised as a model organisation for its continuous pursuit of excellence, EPCH has Headquarters in New Delhi and regional/representative offices in Mumbai, Kolkata, Chennai, Bangalore, Narsapur, Moradabad, Jodhpur, Jaipur, Saharanpur, Agra and Guwahati. 



brands/chains which have a growing interest in India-both for sourcing as well as retailing.

It is a single platform to conduct business and source export quality lifestyle products that adorn the shelves of renowned global chains like Hobby Lobby, Target, Pier1 Imports, Zara Home, Marks & Spencer, Ralph Lauren, etc.

IHGF Delhi Fair will return to the plush India Expo Centre & Mart, New Delhi NCR, for its Spring 2018 edition, scheduled from February 23-27, 2018. While India's top manufacturers, exporters and artisan groups queue up to be amongst the nearly 3,000 participants in the forthcoming sourcing show, overseas buyers too are expected to turn out in large numbers. Visitors to the fair also get access to the 900 permanent showrooms in the Mart, spaced out on four



Visitors always find new accentuations in the showcased themes. Many wholesalers and importers sourcing from India like the work culture of Indian manufacturers.

textiles, shawls, stoles & scarves, embroidered goods, lace, toys, houseware, decorative, gifts & general handicrafts, home textiles and home accessories, candles & incense, pottery, terracotta & ceramics, nautical instruments, Christmas and floral decorations, dry flowers & potpourri, handmade paper products, crafts made of leather, lacquer, marble, etc. offering unparalleled access to exhibitors drawn from all major manufacturing hubs, artisan clusters and craft pockets of India.

Theme Pavilions and regional representations would bring in opportunities to source directly from artisans and new entrepreneurs besides established exporters from these provinces. Designers forum, a new addition at this fair will present collections from select established as well as upcoming Indian designers.

Visiting buyers agree



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THE 4 POWER NODES

1 THE BUSINESS OF RETAIL

Aspirational fashion brands will lose their relevance in the next decade, unless they scale up with own stores. In addition to understanding the tenets of retail operations, mastering the science of leasing and real estate are critical because fashion brands are growing at a faster pace than retail space. The future of fashion is this: In order to grow, a manufacturer must get its act together and become a brand, or become a supplier for every company that needs its products.

2 DESIGN FOR EXPERIENCE

A store is a collection of a thought for a lifestyle, and non-stop customer experience is the most important branding tenet today among retailers. At IFF 2017, aspirational brands can not just showcase out-of-the-box future concept stores to retail real estate companies, but also access next-generation in-store trends and solutions from the best in the business.

3 THE TECH OF EVERYTHING

New-age consumers expect a consistent, seamless, and integrated experience across all retail touch points. Truly successful fashion brands of tomorrow will be those that can not only recognize and cope with the pace of change, but embrace it. Creating seamless shopping experiences requires the right set of unified technology, with a heavy emphasis on the back-end systems and integration to make it all work as one.

4 INTELLIGENT ENGAGEMENT

The need to access and share knowledge has never been as critical as it is today. Equally powerful and dynamic is the convergence of ideas and visions of industry icons, entrepreneurs and professionals in diverse fashion manufacturing, branding and retailing functions.

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Skechers India plans to carry forward the legacy of the global brand and establish itself as a performance and lifestyle-oriented brand that caters to all age groups. The brand aims to adapt to an Omnichannel approach by integrating online and offline for its distribution channel – department and specialty stores...

India's fashion and lifestyle market has grown exponentially in the last decade. Over the last few years, this growth has spilled over to accessories, giving an impetus to the footwear industry. From a basic, need-based industry, it has become an evolving fashion and style category.

The push has helped India become the second largest footwear producer in the world, with footwear production accounting for approximately 9 percent of the global annual production – 22 billion pairs as compared to China, which produces over 60 percent of the global production.

The growth has made India a fertile market for footwear brands to explore, with Indian and international players introducing their performance wear, lifestyle, casual and formal collections in the country.

One such brand which has

helped reshape the Indian footwear market is Skechers.

Skechers, which entered India in 2012, was initially importing its products in the country. When this was

not enough, in 2015, the company decided to start a local manufacturing unit to serve both domestic and export markets. The idea was to firmly plant itself in the

ripe ground that India posed. After nine months of dealing with the Indian Government, the brand finally received permission to open single brand outlets in India.



SKECHERS TO GO OMNICHANNEL; TO INTRODUCE ITS OWN PORTAL IN NEXT COUPLE OF MONTHS

– By Charu Lamba

Skechers: The Brand & Its Roots

Headquartered in Manhattan Beach, Skechers was founded in 1992 by Robert Greenberg and his son Michael. Today a global leader, Skechers USA, Inc. is a \$3 billion company dealing in high performance and lifestyle footwear. It designs, develops and markets more than 3,000 styles for men, women and children.

Beyond the United States, Skechers product is available in more than 160 countries and territories through an international network of subsidiaries in Canada, Brazil, Chile, Japan, and 27 countries in Western and Central Eastern Europe, as well as through joint ventures in Asia and distributors around the world.

In an exclusive interview, Rahul Vira, CEO, Skechers India, spoke about the brand's retail expansion in India.

Throw some light on the background of Skechers.

Launched in 1992, Skechers is the second leading shoe brand for the masses and the classes alike. Skechers, a global leader in performance and lifestyle footwear industry, designs and develops a diverse range of the same for all age groups. We entered India in the year 2012 and recently added a range of apparels and accessories to our portfolio. Our products are sold in around 160 countries through a network of over 30 international distributors.

In a short span of five years, the brand just reached its 100th store mark on September 03, 2017 in Chandigarh. The company manages its international business through a network of global distributors, joint venture partners and wholly-owned subsidiaries.

What is your market positioning in India?

Skechers India plans to carry forward the legacy of the global brand and establish

itself as a performance and lifestyle-oriented brand that caters to all age groups. Currently, the brand presence is a mix of metro cities and Tier II and Tier III cities and we aim to adapt an Omnichannel approach by integrating online and offline for our distribution channel – department and specialty stores (more than 2,305 Skechers company-owned and third-party-owned retail stores).

The brand upped its game by bringing in the Goga Max insole technology, the next evolution of the athletic walking shoes. This provides more cushioning thereby offering better durability, stability and protection.

We are also launching a portal, Skechers.in, which will have stores integrated to it, in order to cater to the 10 percent revenues that come via e-commerce.

Tell us about the brand's design and style inspirations.

Skechers is one of the largest sports and lifestyle footwear brand in the US, known for its performance based shoes. The brand has a diverse range of high quality product range that meets day to day needs of the millennials. The products are categorised as -'Performance' for running, training, golf and walking, 'Casual' for leisure and regular wear. The brand also offers a huge range of kid's shoes in attractive designs. Keeping in mind the importance of fashion in person's daily life, these shoes are designed to offer the perfect mix of comfort and style.

Skechers footwear are designed and engineered to the highest standards. We have a team of world-class athletes who bring experience, knowledge and passion to the product creation process and fulfil the goal to provide the best and most innovative footwear in the market.

The brand upped its game by bringing in the Goga Max insole technology, the next evolution of the athletic walking shoes. This provides more cushioning thereby offering better durability, stability and protection. Designed with the Memory Foam insole and a stretchable top fabric that conforms to the shape of your foot, Skechers leaves no space for tensed and edgy walking. The innovative 5th GEN cushioning, the next generation of Resalyte®



Midsole makes highly flexible training and running shoes extremely light-weighted and provide memory retention that avoids lurching from the ground and helps absorb impact.

Tell us about your product range? Who is your core target audience?

Our product range can be broadly divided into Performance and Lifestyle. Performance refers to shoes that are suited for physical activities such as running, walking, training and golf. The Lifestyle segment provides casual wear that are more centred towards the look and feel of the product that the athletic benefits.

Our core TG is from 16-40 years belonging to SEC A, although we cater to an audience between the age group of 4-40 years.

What kind of scope does the product segment offer in India? What are the challenges?

India is a huge market with a wide scope. The sportswear/ footwear product segment is growing in the country currently. We have experienced high acceptance in the market by the consumers not only in sports footwear but also lifestyle.

The main challenge is to

build portfolio and depth in range, and we are working on it.

What is the brand's current spread (number and format of stores) across sales channels in India?

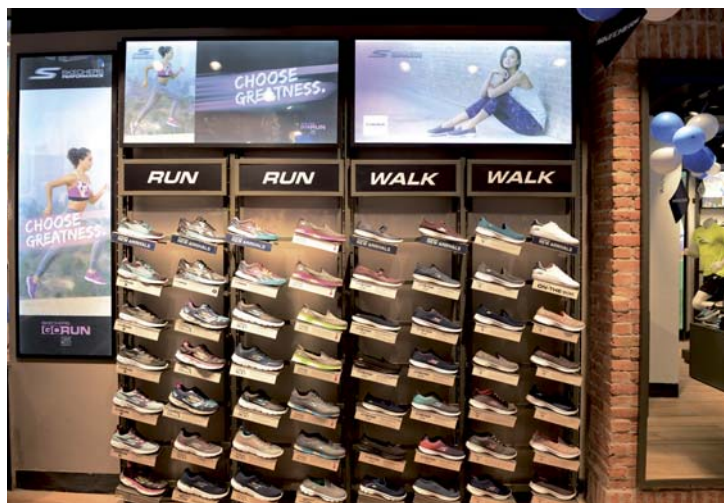
The brand has 100 stores across 45 markets, MBOs and EBOs distribution leads to 130 markets and 800 retail touch points.

Do you have an Omnichannel strategy? Tell us about it.

The brand is adopting Omnichannel approach by integrating online and offline. In the next couple of months' time the brand will go live with www.skechers.in. We shall then have a better clarity on the path towards the Omnichannel approach.

The footwear segment in India has many organized and unorganized brands. How do you establish a strong presence in such a competitive segment?

The footwear segment in India is huge and it's difficult to cater to all types of needs. Our goal is to reach a large chunk of the market and for this purpose, we have created distribution channels through independent networks. We establish a strong presence through strong product portfolio, extensive and effective marketing campaigns and wide retail presence.



What are your India expansion plans?

Skechers entered the Indian market five years ago and since then, we have opened 100 stores in the country. We are growing at a rate of 100 percent year-on-year and we aim to have close to 400 stores in India over a period of five years, by 2022.

When do you hope to launch your own manufacturing units in India?

We shall look at local production once we have the volume required. We are expanding in apparel business, which is fairly new in India. We are currently in the pilot phase and will continue till we get some understanding on the market. Our aim is to first build the confidence in our consumers mind.

Will you be launching your apparel and accessories in India next year?

At present we are on the pilot stage. By mid-next year, we aim to start with apparels and accessories like caps, socks, bags on large scale depending on the pilot results and other things such as infrastructure. Currently, our products are imported completely.

Going forward we plan to

do it locally once we have the scale and time and also if they match same quality as our international developers.

What is the company's turnover and profitability in the Indian market?

The last calendar year was closed at Rs 220 crore. This year, in the first six months, we have already crossed Rs 300 crore.

You are the second-largest in the US and anticipate that you will be among the top five everywhere in the world soon. Where do you see yourself (position wise) in the Indian market?

Every foot should have a Skechers shoe on it - this is our aim. Currently we have achieved a decent amount of market share in the country, which seems extremely promising. The brand caters to all age groups, through performance and lifestyle shoes giving it a wide reach and penetration in the market.

Where do you hope to be in a year's time?

To grow at the same pace as we are right now and maintaining 100 per cent growth rate year-on-year. 





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Tell us about ID.

ID, India's first cult footwear brand, aims to create a unique line of products that draw from various elements of fashion. ID's core consumer falls between the age group of 18-25 years, mostly college goers and young professionals, who have a knack to do things differently, go beyond conventional boundaries, follow new fashion trends, love music and participate in off-beat events.

How successfully has ID expanded its product portfolio over the years? How distinct are its products?

Our team travels around the world to not only discover emerging trends, new materials, new tooling/techniques but also to understand the mindset of the youth. With the help of these new learning and extensive collaborations with our international channel partners, our design team creates footwear that is distinctive and stylish. These unique designs reflect the mindset of our target consumers, who believe in the quality ID produces. Together, they have made ID into a real 'Cult' brand.

Although our focus is on building the potential of our existing product portfolio, but at the same time we are consistently working towards exploring new product categories. ID's current product portfolio has over 300 designs in different product categories like boots, sneakers, rugged casuals, sandals and flip-flops.

What factors make the products different in the market? What factors has majorly contributed to the brand's success in India?

The biggest factor which differentiates ID, is the choice of its innovative materials, colours and tooling. Every product is distinct compared to what is available today in the unorganised footwear market. Special surface treatments on leather, hybrid combination of materials, construction and adoption of exclusive moulds and dies make it further unique and authentic within its segment.

INDIA'S FIRST CULT FOOTWEAR BRAND

– By IMAGES Retail Bureau

ID, owned by M&B Footwear, aims to set up a minimum of 50 exclusive flagship stores across all major cities in India. With aggressive market consolidation and product diversification already underway, Inder Dev Singh Musafir, M&B Director, has a valid reason to be optimistic. In an interaction, he highlighted the choice of innovative materials, colours and tooling as major factors which differentiate ID from others.



With digital advancement and growth in the Internet habitual customers, e-commerce is becoming an eminent platform for the fashion industry.

How robust is the brand's production capacity compared with those operating in the same domain?

Our company M&B Footwear has over 2 decades of in-depth experience in making casual/ leisure leather shoes for several national and international brands, including the very successful Lee Cooper brand that our company represents in India. We have 2 state-of-the-art manufacturing facilities in India, with a capacity to produce 8,000 pairs each in a single shift. This capacity can easily be doubled to meet the growing market demand. We also take stringent measures to keep quality check during production and lay great emphasis on after-sales service to our customers.

Being a country with young population, how much growth is the brand eyeing in the coming years? After looking at the overwhelming response of the

consumers in the last 2 years, we are targeting exponential growth in the coming years. The exposure and learning that we received from selling through online sales channels is being translated to penetrate the offline channel of sales too. By 2021, our aim is to set up a minimum of 50 exclusive ID flagship stores across all major cities in India. We are already in the process of launching the ID range of apparel and accessories by Mid-2019, for this we are also looking for reliable channel partners who can join our quest and represent us.

In which regions of the country do the brand's products enjoy strong demand? What products have been doing significantly well?

Though it is too early to reach to a conclusion as to which region is performing better. As of now we have limited offline presence. However, we have seen through our online sale data that majority of the customers are from south and west. Therefore, looking at this, as part of our expansion strategy, we are launching exclusive ranges through modern retail and MBO's currently only in these two regions. Other markets will be targeted in the forthcoming season. Since ID brand is known for casuals and the lifestyle

product segment, the current response of these lines is extremely good.

Kindly explain ID's retail consolidation over the years. What new strategy is the brand planning?

Currently, ID products are available across 300 stores which include all major modern retails/key account stores like Metro, Lifestyle, Central, Shoppers Stop, Reliance and selective Regional Chain stores & MBO's. By the end of 2018, we plan to have the ID brand selling through over 2000 doors across India, this being possible, thanks to the our company's well established and very strong distribution and modern retail network already being in place.

How strong is the brand's online retail approach? How is it positioned today in the sector?

With digital advancement and growth in the Internet habitual customers, e-commerce is becoming an eminent platform for the fashion industry. Improved supply chain (fast delivery/easy returns/cash on delivery etc.), frequent special events and gratifying promotions, have further increased market penetration thanks to the e-commerce platform.



Majority of the brick-and-mortar retail stores are still concentrated in larger cities and are unable to meet the rising aspirations of the consumer in smaller cities across India, whereas e-commerce has made it possible to reach and deliver to smaller towns where brick-and-mortar retail stores are either not viable or have very less penetration. We consider e-commerce as an important and growing channel for ID brand, and have a strategic - strategic plan in place for differentiating - differentiating on-line and off-line merchandise, so as to avoid any cannibalisation of the business in either segments.

What is your marketing strategy?

Looking at the change in the consumer behaviour, in our opinion, digital marketing is a major medium for advertising. Today the youth are spending a good amount of time on smartphones and Internet to keep themselves informed, and actively participating in expressing their opinion on the social media. This generation of the new age consumers are the core target customers of the ID. We are very active on all digital platforms and social media like Facebook, Twitter and Instagram. Within the last year or so, the ID's Facebook page already has more than 2.5 lakh fans, which showcases the brand's popularity amongst the youth. In the coming season, we will also be actively using other mediums of advertising such as newspapers, billboards, TV and cinema in order to increase brand awareness. We are in the process of finalising sponsorships to youth-centric TV reality shows and live events that target the youth. 



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UNLOCKING THE ELUSIVE R.O.I IN OMNICHANNEL TRANSFORMATIONS

AN INSIGHTFUL ROUNDTABLE DISCUSSION POWERED BY ARVIND INTERNET

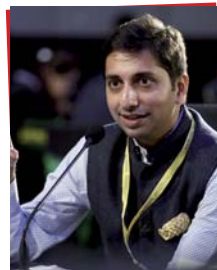
– By IMAGES Retail Bureau

The roundtable debated how in this always-on Omnichannel digital age, retailers must create the best experience to meet consumers' needs and capture their hearts, minds and wallets.

Session Partner

Arvind internet

At the India Omnichannel Forum 2017 – held on September 19 and 20, 2017 in Mumbai, concurrently with the India Retail Forum – retail leaders met to debate *'The Business View: Unlocking the Elusive Return-On-Investment in Omnichannel Transformations'*. The roundtable, powered by Arvind Internet, debated how in this always-on



Mukul Bafana



Bijou Kurien



Mohit Kampani

Omnichannel digital age, retailers must create the best experience to meet consumers' needs and capture their hearts, minds and wallets.

The esteemed panel included Moderator: **Mukul Bafana**, Co-founder and CEO, Arvind Internet Co-Moderator: **Bijou Kurien**, Board Member, L Catterton Asia; **Ajay Kapoor**, President - Retail, Fabindia; **Mohit Kampani**, CEO, Aditya Birla Retail; **Sanjay Vakharia**, CEO, Spykar; **Vasanth Kumar**, Executive Director, Max; **Rajesh Jain**, Managing Director & CEO, Lacoste; **Sunil Nayak**, CEO, Reliance Jewels; **Vikram Upadhyaya**, Chief Mentor, GHV

Accelerator / Greenhouse Ventures; and **Dhiraj Mehta**, GM Brands, Numero Uno Clothing & COCO Business.

Arvind Internet, an e-commerce division of textiles major Arvind, is restructuring its business operations to become an Omnichannel enabler for large brands and retailers, providing technological and back-end support to them.

The firm has already bagged contracts to create brand e-commerce sites and omnichannel capabilities for brands such as GAP, Tommy Hilfiger, CK, Puma, Levi's, Reliance Brands, Converse, Being Human, Forever New, Numero Uno and BlackBerry in the Indian market and

aims to have 30 more brands in its kitty by the end of this fiscal.

Mukul Bafana, Co-founder and CEO, Arvind Internet said that his company was India's Omnichannel enablement company. "We work with brands and retailers to enable their online and offline journey and drive value in creating value for the customers also. We work with brands like GAP, Tommy Hilfiger, CK, Levi's, Converse to name a few. We have built an entire technology stack and supporting services to drive Omnichannel. We focus on providing end-to-end Omnichannel solutions. Beyond our technology stack we have services like call centers, logistics provider, retail operations support, and content management as well."

Bijou Kurien, Board Member, L Catterton Asia structured the session into four broad points:

- When retailers think Omnichannel, what does it mean for them?
- What is the frame-work they have in mind to define the return on Omnichannel investment?
- In which part of the business would they like to make Omnichannel investments?
- What are the challenges and obstacles in their Omnichannel journey?

Mohit Kampani, CEO, Aditya Birla Retail shares his vision as he says, "For a physical retailer, specially one in grocery retail, the choice is pretty clear. For us Omnichannel clearly means providing seamless transactions to customers between channels and the same service when they visit stores."



Sunil Nayak



Rajesh Jain



Sanjay Vakharia



Vasanth Kumar



Ajay Kapoor



Dhiraj Mehta

According to **Sunil Nayak, CEO, Reliance Jewels**, “For us e-commerce is not top priority, but we are looking at options in augmented reality to help reduce investment in inventory. This is our Omnichannel vision.”

Rajesh Jain, Managing Director & CEO, Lacoste said he looked at Omnichannel only from the financial

perspective – in terms of return on investments. As a brand Omnichannel can help me expose my entire inventory (in all outlets) to discerning customers. We can then serve consumers at a place and time of their convenience.”

Sanjay Vakharia, CEO, Spykar agreed to this saying: “For us – since we are a leading youthwear brand – not to be in any digital form will be suicidal. For the brand to evolve, Omnichannel is imperative. Our EBOs are an average of 600-700 sq.ft. and adding categories will only restrict us in space. Hence, Omnichannel is essential for us. It’s a great way to engage with the consumers through various mediums and fulfill their aspirations.”

To check on the customer driver to the Omnichannel approach **Vasanth Kumar, Executive Director, Max** said, “At Landmark Group, we have revised our entire playbook since our launch. We launched our e-commerce platform as Landmark Shops and we housed all our brands here. Six months down the line we figured out that the battle is going to be different. We came to a conclusion that instead of banking and generating equity for one more brand, we need to roll back and launch our own brands for doing e-commerce business. That’s exactly what we did and this was an exercise where we were clear

that we were not running after new customers, but were rather looking after our existing customer base and converting them into loyalists. At Landmark, we have 16 million customers and we could convert just 5 percent of these customers to online which is way above to our achievement. So, we changed the whole strategy and today we have maxfashion.com, lifestylestores.com, homecenters.com, which is in a way giving superior digital experience to the customer who is free to shop online or offline. Not only this, we also decided that we will drive half our business through our apps. We could see the change coming and today our one and half percent of our offline sales is coming through our online platforms.”

Talking about the Omnichannel play in the ethnicwear segment in India, **Ajay Kapoor, President - Retail, Fabindia** stated: “Omnichannel for Fabindia refers to the three pillars of customer, inventory and marketing. Customers want a seamless experience today whether they are coming to your store or are going online. We are looking at how we can integrate everything together and bring out a complete proposition. We have 3 percent of our business coming from our Fabindia portal. We are also looking at a number of categories to

grow with this channel.”

Dhiraj Mehta, GM Brands, Numero Uno Clothing & COCO Business described his brand’s Omnichannel journey saying, “We are at a nascent stage for going Omnichannel currently. My objective to go Omnichannel is very simple and that is to optimize my inventory. We are into a lot of business models and the priority would also be educating all business channels.”

The session ended with Bijou Kurien touching base on the kind of investments required to fulfill the Omnichannel journey. “Augmented reality may bring in some kind of investments. These investments can be a pure technology play. It can be beyond that for what you need to do at the stores. It could be within internal department, on what you can do behind in terms of the inventory and linking that to the support services. The investments can be about training the people who will be implementing the Omnichannel business. There may be investments in terms of call centers etc which you might be setting up. So, in short there are host of investments required which should be calibrated in line with the journey which you are embarking upon,” he concluded.

– With inputs from **Gurbir Singh Gulati**

KEY SESSION HIGHLIGHTS

- Defining the Omnichannel transformation playbook based on ROI for your business.
- Narrowing down on the definition of success for your Omnichannel vision.
- Understanding the investment required to create successful Omnichannel journey.
- Demystifying the technology needed to create ROI in Omnichannel journey.
- Baseline and setting the right expectations for ROI in Omnichannel transformations.
- Addressing common mistakes and misrepresentations in achieving ROI in Omnichannel Transformations.
- Managing change across organizational functions to realize the benefits of Omnichannel transformations.



INCREASING RETAIL REVENUE USING ARTIFICIAL INTELLIGENCE

POWERED BY VERIHELP

– By IMAGES Retail Bureau

A large number of retailers have opened to the use of artificial intelligence in the recent past to gain access to more accurate demographic data that helps them understand shoppers which in turn allows for more tailored choices from the retailer to the consumer...



Bhushan Kollerli

them understand shoppers which in turn allows for more tailored choices from the retailer to the consumer.

One company which is bringing AI out of the realm of sci-fi and into everyday lives is VeriHelp. VeriHelp is an advanced computing technology headquartered in Seattle, with patent-pending technologies and apps ranging from financial inclusion in emerging economies to retail acceleration.

The company has recently developed a revolutionary retail analytics kiosk, which uses artificial intelligence to instantly recognize customers who have previously shopped

in the store. It gives predictive recommendations like personalised product bundles – all with a high probability of sales conversion.

At the India Omnichannel Forum 2017 – held on September 19 and 20, 2017 in Mumbai, concurrently with the India Retail Forum – retail leaders met to debate **'Increasing Retail Revenue Using Artificial Intelligence'**. Industry honchos at this roundtable, powered by VeriHelp, talked about the penetration of AI into the Indian retail scenario.

The panel included **Chetan Chaturvedi**, Head - IT, Reliance Market (RIL); **Kapil Kohli**, Vice President - Retail Business, Usha International; **Kiran Komatla**, VP - IT, Burger King; **Pooraan Jaiswal**, CTO, Globus Stores; **Ranjit Satyanath**, CIO, Infinita Retail (Croma); **Shreyash Trivedi**, General Manager – Retail Operations, Raymond; **Dr. Raaghav Kashyap**, CTO, VeriHelp (globally renowned computer

'AI in Retail Market by Type, Technology, Solution, Service, Deployment Mode, Application, Region - Global Forecast to 2022', by MarketsandMarkets says:

- The market size is expected to grow from \$993.6 million in 2017 to \$5,034 million by 2022, at a CAGR of 38.3 percent.
- The key factors driving the growth of the AI in retail market include the increasing need to streamline Omnichannel retailing and customer turnover.
- Retail organisations are using machine learning and deep learning technology to offer a more personalised experience to end-users as well as to provide an interactive environment to them.
- Rising technology adoption can be attributed to the need for streamlining retail operations, minimising efforts, and increasing revenue for retailers.
- The need for visual search solutions is expected to grow, due to their increasing popularity among e-retailers as well as shoppers.

scientist on applied AI - Google, IBM Research, and Bell Labs); and **Vishal Malik**, Business Head- Retail, Intex Technologies. The roundtable was moderated by **Bhushan Kollerli**, CEO, VeriHelp.

Kollerli kickstarted the session by asking the panelists what Artificial Intelligence meant, in their perspective.

Pooraan Jaiswal, CTO, Globus Stores responded



In last few years, artificial intelligence technology has made many advancements across the retail industry, despite it being expensive and inspite of challenges like inaccessibility and proprietary systems.

Currently, a majority of retailers use AI for accurate demographic data that helps



Pooraan Jaiswal



Shreyash Trivedi



Kiran Komatla



Kapil Kohli



Chetan Chaturvedi



Vishal Malik

to this saying: “Artificial Intelligence (AI) is something which people are banking on more and more. Currently, it is all about data. Retailers are becoming very savvy when it comes to using AI to collect data to create a more complete view of each customer. Once companies have this information, then it becomes easy to deliver a more personalised experience and faster, smoother delivery to customers. In short, from where I’m sitting, AI is going to be the game changer in retail in the very near future.”

Shreyash Trivedi, General Manager – Retail Operations, Raymond added, “In simple terms, AI is intelligence which is artificially-led and has no human interface to it. If retailers actively pursue this, then they take care of millions of case studies and references, which are extremely accurate once the data analysis is

done. AI is something which is taking us to the next level of retail.”

According to **Kiran Komatla, VP – IT, Burger King** “Selling is an art and one way to excel at it is to recognise our customers and understand their needs and requirements. The conditions in which a customer is coming to buy products – along with our recommendations – is very important. We as retailers must understand that the human brain cannot comprehend the huge amount of data that is being generated to study consumer behavior. Thus, we have started using technology that can read customer patterns, can help us analyse all the data collected, to drive further sales. Artificial Intelligence is one layer above simple data collection.”

AI can help marketers optimise their communications as it

continually learns from user behavior. The technology is designed to integrate a wide range of customer data derived from multiple digital and physical channels, which is then analysed and used to predict customer behavior, and engage with customers.

Kapil Kohli, Vice President – Retail Business, Usha International, entered the discussion at this point stating that Artificial Intelligence is very easy to understand- in simple terms it is market research and market reality which are integrated together. “Till the retailers are just selling the product, they are just looking at the art of selling. When AI is brought into the picture, the computerised intelligence gives a clearer look at the science behind selling.”

RIL’s **Chetan Chaturvedi, Head – IT, Reliance Market (RIL)** explained his point of view saying: “If we can have

a computing environment and an eco-system in which we can have learning and reasoning ability, then it is true Artificial Intelligence.”

Recognizing that the change is inevitable but when the change is so fast it is difficult for the human brain to register it, **Vishal Malik, Business Head – Retail, Intex Technologies** said, “It is a challenge for the human brain to recognize this rapidly evolving customer and his demands. This is where AI comes into the picture – a must for all growing businesses.”

Savvy, winning retailers are rapidly understanding that AI technology is here to stay, rather than something in a sci-fi flick.

Bhushan Koller, CEO, VeriHelp summed up the roundtable discussion with his interpretation of AI saying, “AI works in two parts: one is the logical analysis of a particular subject and the second is its reasoning ability. Essentially, in retail, AI is mostly about analysing data and identifying patterns and giving retailers an overall report. AI solutions for customer segmentation will continue to become more and more sophisticated, allowing marketers to integrate vast amounts of data to make the customer journey more personalised, and more efficient.”

– With inputs from
Gurbir Singh Gulati





TOP PROBLEMS IN MODERN RETAIL IN INDIA THAT ARE CRYING FOR A SOLUTION IN TECHNOLOGY

POWERED BY HONEYWELL

– By IMAGES Retail Bureau

At a high-level, all retailers today are looking for the best way for Omnichannel solutions – but what does that actually mean to the CIO or COO?



Vanita Khetan

this meant for companies – are they looking for very specific ways to enhance customer experience in the store? What are the technologies evaluated to be able to have a geospatial view of their inventory across warehouses and stores? Or to have suggestions for their planograms and replenishment based on their orders and consumptions? Or are there other “here and now” issues?

The session centered around practical roadmaps and real experiences, apart from focusing on the immediate future – over the next two to three years.

The esteemed panel included **Abel Correa**, Head IT Strategy & Governance, Arvind Limited; **Anil Menon**, Head IT, Trent Hypermarket Star; **Kunal Mehta**, GM IT - Lifestyle Business, Raymond; **Piyush Gandhi**, Regional Director, Project & Development Services, JLL India; **Pooja Maheshwari Salwan**, Category Head - Fashion Tech and Gadgets, Ajio.com; **Shirish Kalamkar**, GM IT, Major Brands; **Sarvana C**, Head Application, Max

KEY DISCUSSION POINTS

- Common issues being faced by the retailers
- Solutions being implemented by some retailers and practical problems that crop up while implementing these solutions
- Visionary solutions, technologies that may be on CIO wish-lists

Hypermarket (SPAR); and **Yakeen Gazi**, Senior VP - IT, Hypercity Retail.

The roundtable discussion was moderated by **Vanita Khetan**, Strategic Marketing Leader – SPS India, Honeywell, who opened the floor to a discussion on specific initiatives and interventions in technology which can make a difference to business outcomes for retailers.

Yakeen Gazi, Senior VP - IT, Hypercity Retail said, “We have to re-look at the way technology platforms are structured today. If I have to identify my competition I would clearly say that it is from the online space that I am facing the maximum amount of challenge. Looking ahead, we (traditional retailers) need to prepare ourselves for business for the next five years with technology that can take on the new-age tech solutions adopted by online retailers. This is my personal roadmap for my company.”

Pooja Maheshwari Salwan, Category Head - Fashion Tech and Gadgets, Ajio.com, however had a slightly different solution. She highlighted the fact that there can be a seamless process between both online and offline stores saying, “We have to make the inventory talk to each other. Right now, we are just building systems over the prevailing ones wherein the information flow is not clear. To ensure good sales, the inventory flow has to be unified between the physical store and its online counterpart.”

Talking about the other big challenge, **Abel Correa, Head IT Strategy & Governance, Arvind Limited** said, “The recognition of the customer – online or offline – is a huge gap area. We have a disjoint in this architecture and systems

Session Partner

Honeywell
THE POWER OF CONNECTED

At the India Omnichannel Forum 2017 – held on September 19 and 20, 2017 in Mumbai, concurrently with the India Retail Forum – retail leaders met to debate **‘Top Problems in Modern Retail in India That Are Crying for a Solution in Technology’**.

The roundtable powered by Honeywell, discussed what



Yakeen Gazi



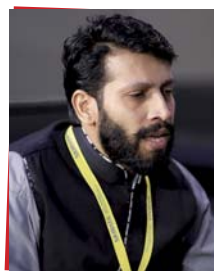
Abel Correa



Piyush Gandhi



Sarvana C



Kunal Mehta



Shirish Kalamkar

available to us. Think about it, brick-and-mortar retail has been around for 20 years while online retail has come up only in the last 10 years but if we compare the technology between the two, one can see a huge gap there.”

“But where are the provisions and the investments which will be required to compete with e-commerce in India? That’s a big question. We need an eco-system which helps recognise the customer, understand his/her need and make sure that the fulfillment happens,” he added.

On how an organization can come together and solve the issues on investments vs. outcome, **Piyush Gandhi, Regional Director, Project & Development Services, JLL India** said, “Both ends of retail brick-and-mortar and e-retail are growing equally fast today. Over the years, it’s become obvious that e-commerce companies have been really innovative, and technology driven in comparison to



brick-and-mortar which is still relying on outdated systems. Also, customers have evolved over the years, but brick-and-mortar formats haven’t – at least not for the last 10-15 years or so. Traditional retailers need to understand that buying software may not be the only solution. We have to think of ways to forward the business as a whole.”

Moving to the choices companies have made in the past to enhance customer experiences, **Sarvana C, Head Application, Max Hypermarket (SPAR)** said, “We noticed that there were a set of customers who were not able to reach our store or the reach to their destination was very low. For them we explored a kiosk model, which is implemented across societies and SEZs. This worked offline and did not require 24/7 support connectivity and was created to provide ease to SPAR customers. Another initiative that we undertook

was for our vertical related to home & living. We set-up a 3D showroom which gave end-to-end solutions to consumers wherein they could take a look at the products and visualize how they would look in their homes.”

According to **Kunal Mehta, GM IT - Lifestyle Business, Raymond**, companies need to realise that technology must be made in line with its business processes. “If one thinks to imitate the others in implementing new technologies, then the company needs to change its business perception also. What we at Raymond are doing is that we have started looking at new ways of functioning – we have moved to a cloud-based system wherein all the technology that we use, we have moved to the cloud, be it the loyalty program, or mobility initiative. This is then connected to our back-end systems.”

Shirish Kalamkar, GM IT, Major Brands added, “In retail industry we are not as focused as the hotel or restaurant industries are, where they completely understand the consumer’s entire lifecycle. Engaging the consumer is very important, but the fun associated with shopping should not suffer with the implementation of technology.

The discussion was brought to a fruitful conclusion by **Vanita Khetan, Strategic Marketing Leader - SPS India, Honeywell**, who said, “There are various ways in which technology can take away the pains across all departments of retail, which will in turn help in achieving the seamlessness that an organization craves for all its different modules. We need to take learnings from other, more mature industries and see how they engage with the customers.”

– With inputs from Gurbir Singh Gulati

WHAT RETAIL ORGANISATIONS NEED

- To be technology-first to compete in this fast-changing scenario
- To put someone in charge who can integrate technology with daily workings of an organisation
- To involve CIOs in a company’s decision-making process



O TO O: WHAT DOES IT TAKE TO WIN THE OMNICHANNEL WAR?

POWERED BY VINCULUM

– By IMAGES Retail Bureau

The Omnichannel conversation is not about offline vs online. Whether you are a new brand or an established one, every retailer needs to focus on how to converge both platforms to maximise traffic for the brand...

Session Partner

Vinculum
Enabling Multi Channel Retailing



Which kind of products sell better online?

Do customers worry about which channel they buy from? How are brands selling online today? How to manage brand promise on marketplaces? Are luxury products a good fit to sell on marketplaces? Can retailers collaborate with marketplaces? Why are online retailers setting up stores?



Venkat Nott

Are the challenges different for them? How can brands go cross border?

These were some of the questions that an elite panel comprising **Jaineel Aga**, MD & CEO, Planet Superheroes; **Meheriar Patel**, Chief Technology Officer, The Mobile Store; **Mike Ghasemi**, Research Director, Retail Insights Asia Pacific & Head of WW Hospitality & Travel Insights, IDC Singapore; **Pallav Atreja**, Business Head - EBO & E-commerce, MAS Holdings; **Pooja Maheshwari Salwan**, Category Head - Fashion Tech and Gadgets, Ajio.com; **Riya Vipan Kalra**, Co-Founder, Candyskin; **Sauwik Banerjee**, CTO, TataCLiQ, Vice President, Tata Industries - Digital Initiatives, Advisory to Group Cos; and **Shivani Poddar**, Co-Founder,

Faballey.com, tried to answer in a session titled '**O To O: What Does It Take to Win the Omnichannel War?**'

The session was moderated by **Venkat Nott**, **Founder and CEO, Vinculum Group**, who kickstarted the debate by speaking about the Vinculum Group. "We are a software company enabling multi-channel retailing. At Vinculum, we created a platform which integrates into 30 plus marketplaces and 50 plus logistic companies that facilitates selling in any part of the world for retailers. Each marketplace has a specific requirement for products and it takes retail companies a long time to get their products specific-market ready. We are trying to solve this problem for the retail industry by automating it."

Vinculum has also created a set of tools which facilitates a real-time view of the inventory for stores and warehouse which is fundamental to enabling Omnichannel commerce. The company provides retailers with a 360-degree Omnichannel experience with the ability to actually

make money out of it. "This is the perfect time for the Indian industry to leapfrog into the Omnichannel space, to go every step of the journey and we could do this in two to three years," he stated.

The Omnichannel Journey

Shivani Poddar, **Co-Founder, FabAlley.com** spoke about FabAlley's model saying: "We started as an online brand about five years back, and we do everything for women from the age group of 20-35. We have recently launched a new mobile-enabled app, in keeping with the evolving consumer. We have also started expanding offline. We have 50 shop-in-shops as well as our own stores. We are now amongst the market leaders in the online space."

"For us, the competition comes from brands. From an offline and online point of view, we compete with everyone, from Zara to Myntra to Amazon. Along with this, we compete with roadside retailers as well who sell a top for around ₹500-600 on the streets. However, we don't compete with marketplaces. They are our channel partners, our distribution channels and we work with them as they increase our sales."

"From a retail point of view, we have tied up with the large format of store and distributors, who are also our channel partners. Our online stores produce the larger part of the business around 40 to 45 percent. We also work with a bunch of distribution partners which gives about 35 percent of the business and remaining 20 percent is offline for us," she added.

Pooja Maheshwari Salwan, **Category Head -**



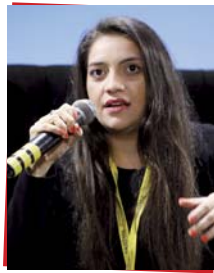
Shivani Poddar



Pooja Maheshwari Salwan



Pallav Atreja



Riya Vipan Kalra



Sauvik Banerjee



Meheriar Patel

Fashion Tech and Gadgets, Ajoio.com, took over from here. She said, “Ajoio is the online website of Reliance Retail. Our competitors are not the likes of Flipkart, and Amazon; we are more vertical, so we look at the likes of Myntra, and Jabong as our competition.”

She described Ajoio’s storyline saying, “We are more curators and we prefer to house premium merchandise at affordable prices. We want our customers to feel that they are looking at the best available products in the market in a certain price bracket.” She explained that it was not just online retailers who collaborated with Ajoio but offline retailers are well since that helped increase sales.

The Omnichannel Lingerie Model

Pallav Atreja, Business Head, EBO & e-commerce, MAS Holdings, explained the model saying that his was a premium, intimate-wear brand.

“We launched the brand in India in October 2007, and it’s

been an incredible journey so far. We started the journey from MBOs and we have grown into the market, evolved to large format stores, to launching our own website three years ago. One-and-a-half years ago, we started our own EBOs. Basically, we’ve evolved into a multi-channel brand and online now accounts for 15 percent of our revenues. We see it growing and settling down at 17-18 percent as we grow. For now, we are working towards combining all these channels and giving our consumers an Omnichannel experience,” he stated.

The brand – which started in Sri Lanka – already has 11 EBOs in India. By the end of this year, they plan to take this number to 15 and next year, add 15 more stores.

“India is going to be the center stage of our expansion and Omnichannel plans. Apart from that, the target is to cover the entire South Asian market in the next couple of years. So, by 2020, we hope to be present in all the eight-country market of South Asia,” he explained.

Riya Vipan Kalra, Co-Founder, Candyskin entered the discussion at this point saying, “Candyskin is a lingerie brand which was launched in January 2017. Currently, we are present in 45 offline stores and 13 portals plus our own website.”

She said that a big chunk of their sales came from offline channels – specifically the MBOs who have Candyskin

“We have 50 shop-in-shops as well as our own stores. We are now amongst the market leaders in the online space.”

– Shivani Poddar

“We want our customers to feel that they are looking at the best available products in the market in a certain price bracket.”

– Pooja Maheshwari Salwan

“We started the journey from MBOs and we have grown into the market, evolved to large format stores, to launching our own website three years ago.”

– Pallav Atreja

“We are also working on to increase our online presence by approaching more portals.”

– Riya Vipan Kalra

fit consultants. “These are consultants who represent the brand and help the consumers put a face to Candyskin. We are also working on to increase our online presence by approaching more portals,” she added.

Exceptional Brand Journeys

Sauvik Banerjee, CTO, TataCLiQ, Vice President, Tata Industries - Digital Initiatives, Advisory to Group Cos spoke about his brand saying: “When Tata Group ventured into the e-commerce space, the intent was not to become a pure play marketplace, especially since we were late entrants to the e-commerce marketplace. The intent was to ensure that we showcase the brick-and-mortar retail brand online while fighting the online discounts war – figure out if online discounting was at all achievable.”

The brand has been online for almost a year-and-a-half now, with about 1,000 brands onboard. TataCLiQ has even started a parallel electronics e-store, moved into accessories, kids, as well as luxury verticals.

“Everything that have online is shipped from the store and is part of our click-and-collect model. We want a seamless Omnichannel model to ensure that our brick-and-mortar retail does not suffer in this offline to online conversation,” Banerjee said.

KEY SESSION HIGHLIGHTS

- Defining the Omnichannel journey of brands
- Comparing the omnichannel model of two lingerie brands
- e-commerce and Ship from Store model
- Consumer engagement, market and Technology



Jaineel Aga



Mike Ghasemi

“TataCLiQ is kind of a physical mall, where stores are connected. We are integrated with Vinculum and the intent is to ensure the efficiency of logistics. It’s a consumer engagement thing,” he said, adding that the brand is currently focusing on a ‘*ship from store*’ model – based on consumers selecting products online on the availability of their products in the proximity of their pincodes.

“We ensure that the product is delivered from the nearest possible store. Both delivery and returns are much more logistically convenient then,” he stated.

Meheriar Patel, Chief Technology Officer, The Mobile Store took over from here saying, “In 2015, when I joined The Mobile Store, it was a traditional brick-and-mortar retailer with 1,500 stores, no online concentration, no app journeys. We wanted to service our customers better. So, we designed an App called ‘Fastest Express Delivery’. This app now brings in 30 percent of our revenue.”

He says that faster delivery is just one of the services the brand has souped up in the recent past. “Through our app, we provide end-to-end operations, great logistics and stock availability. Having said that, I feel technology alone is not the only thing which has played a big part in helping us grow. Operational efficiency, supply chain, as well as real-

time technology are all helping us big time to achieve a growth scenario,” he stated.

Planet Superheroes, a small, five-year-old company which is in a sense, a license

character merchandising company works on the philosophy that, whether India or anywhere in the world, customers don’t buy channels, they buy brands and they buy products.

“One has to ensure that a particular product fits a channel. When we started online, it was the best way to test out something so niche and it worked fairly well. But then we realised that overtime, the cost of acquisition online starts diminishing returns. It goes beyond the rental cost offline. This was one of the reasons we decided to venture into traditional retail,” said **Jaineel Aga, MD & CEO, Planet Superheroes.**

“Another reason why we are going offline is that we need to develop customer interest in our product and that can only come with channel partners and distributors. We need to create brand awareness,” he added.

Consumer Engagement, Market & Technology Trends

Mike Ghasemi, Research Director, Retail Insights Asia Pacific & Head of WW Hospitality & Travel Insights, IDC Singapore plunged into the discussion at this stage, saying, “I come from IDC and what I do is to focus on retail industry trends. We do lots of surveys and technology observations and micro-economy research as well. Looking at the retail perspective in Asia or India,

“**The intent was to ensure that we showcase the brick-and-mortar retail brand online while fighting the online discounts war – figure out if online discounting was at all achievable.**”

– *Sauvik Banerjee*

“**I feel technology alone is not the only thing which has played a big part in helping us grow. Operational efficiency, supply chain, as well as real-time technology are all helping us big time to achieve a growth scenario.**”

– *Meheriar Patel*

“**When we started online, it was the best way to test out something so niche and it worked fairly well.**”

– *Jaineel Aga*

“**Looking at the retail perspective in Asia or India, we see a common trend – all retailers are working towards improving customer experience.**”

– *Mike Ghasemi*

we see a common trend – all retailers are working towards improving customer experience. They are using new and improved technologies to engage consumers, both pre-and-post purchase. They are also keeping track of customer behavior, and his shopping journey.”

“IoT is now becoming mainstream. It’s helping retailers understand how the customer is engaging with brands, finding the location of the customer, the time that a customer spends on products and the areas which the customer concentrates on within their stores,” Ghasemi added. He also explained that customers who shop online and offline have very different profiles. “The customers that shop online are obviously more tech-savvy – the ‘always connected customers.’ They look for the best deals, they want to stay connected with the brand all the time, everywhere, and they are extremely demanding. Meanwhile, consumers who prefer traditional retail have a very different profile. They have a brand loyalty, product experience is important to them, but at the same time they have high expectation in terms of store technology. It is important how the store assistant helps/treats them,” explained Ghasemi.

“According to him, the Omnichannel conversation is not about offline vs online. “Whether you are a new brand or an established one, you need foundation otherwise you are just trying your luck. In my opinion, when you set up a business, you should focus on how to converge both platforms to maximise traffic for your brand,” he concluded.

– *With inputs from Sandeep Kumar*

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DATA IS THE NEW CURRENCY

POWERED BY MINODES

– By IMAGES Retail Bureau

Data is an extremely encashable and easy to liquidate asset, making it the most dependable strength for the retail industry in current times...

Session Partner

MINODES

“You can have data without information, but you cannot have information without data.”

– Daniel Keys Moran.

Data is a set of values of qualitative or quantitative variables.

It's the most valuable asset today and multiplies a company's returns many times over. It is instrumental to innovation in product and service design, to efficiencies in supply

line management, and to effectiveness in marketing. Data is the new currency for digital transformation.

Retailers, business leaders, and experts know that data is important to execute their strategy and therefore they treat data like a currency. However, the fact is still underestimating the importance of data. The information your business generates, and accesses is not merely a tool for operational execution. It is so essential to the success of a modern business that it must be handled as carefully and strategically as currency. Like finances, data requires the focused attention of the C-suite and the Board.

Take customer experience, which is the true driving force behind the idea of 'digital transformation.' Personalisation is the key to the digital customer experience.

At the India Retail Forum 2017 – held on September 19 and 20, 2017 in Mumbai, experts from the IT industry and the business heads of different categories of retail

met to debate on '**Data is the New Currency**.' The way forward for any business lies, in good part, through smarter use of its data. Like money and other key resources, leaders must look to comprehensively govern and wisely leverage their data.

The panel included **Abel Correa**, Head IT Strategy & Governance, Arvind Limited; **Alexander Köth**, Managing Director & Founder, Minodes GmbH (Germany); **Chirag Boonlia**, VP – IT, Virtuous Retail India; **Kiran Komatla**, VP – IT, Burger King; **Harshavardhan Chauhan**, Central Head of Marketing, DLF Shopping Malls; **Meheriar Patel**, Chief Technology Officer, The Mobile Store; **Mukul B Singh**, Head – Marketing, Reliance Jewels; **Ranjit Satyanath**, CIO, Infiniti Retail (Croma); **Sachin Oswal**, Omnichannel Head, Shoppers Stop; **Reuben Pandian**, Chief Omnichannel Officer, TataCLiQ. The session was moderated by **Vinay Bhatia**, CEO - Loyalty & Analytics, Future Group.

“In India, data, in reality,

is in our culture. It is the platform on which entire businesses run. But the question is: how much of the data is truly being used in the business? Despite having bytes and terabytes of data today, we are still sending messages and offers in bulk to the wrong person and keep repeating the mistake. Despite having so much of data around, something is still not working, and we are still not serious about it,” said **Vinay Bhatia, CEO - Loyalty & Analytics, Future Group**, as a part of his introductory speech. He went on to ask questions from the panel pointing different aspects of the data involved in respective categories of retail.

Describing how cell phone market uses the data and leverages the market, **Ranjit Satyanath, CIO, Infiniti Retail (Croma)** said, “In the initial stages, we thought that using the mobile range at the certain price would be our target audience; therefore, we used NPS and the feedback loop very effectively. What we found that the customers were not concerned about the price points. Instead, they came into our stores, expecting to buy it across all price ranges. Analysing the data that we collected, we looked into the assortment and noticed that the lower end mobile phones were really flying up the shelves. As a result, mobile phones and communication is our top category.”

Alexander Köth, Managing Director & Founder, Minodes GmbH, pointed out on a new perspective 'Pay with data' concept. “As an online consumer, we pay already with our data. Most of us believe that online portals give lots of service for free, like free delivery and all, but in



Vinay Bhatia



Ranjit Satyanath



Alexander Köth



Harshavardhan Chauhan



Abel Correa



Reuben Pandian

the end, it is not for free. We allow them and give them a lot of data and the smart thing is that big player like Google, Amazon is far ahead of us by making some knowledgeable and consulting chart by the data or fill some AWS service. They really make a profit out of that by selling the data to other parties. This is a crucial thing, it's not about only collecting data, and it's about converting them into measures and finally the measures into real money or profit," said Köth.

Ranjeet agrees. "A lot of retailers give their data, because stores are not working well and therefore they list their products on Amazon, and what you are really doing is that you are giving so much of consumer data to what Amazon in exchange for short terms sales. Large retailers like Walmart believe that Amazon also harvest data of AWS, so Walmart in the USA have a

strict rule that they will not work with any IT services company who have their service hosting on AWS. That is the kind of importance they give to data."

Harshavardhan Chauhan, Central Head of Marketing, DLF Shopping Malls spoke on the Non-transactional use of data.

"Data is like oil and it is useless in the raw form. The more you refine, it actually keeps on becoming money indeed the currency. One fundamental change which data has brought in is the fact that the business has suddenly gone from being transactional nature to very consumer-centric. Data initially was part of our transactional journey of the top line and the bottom line, typically chaired by the finance guys in the family. The entire data journey in five parts can be summed up as business and retailers; we have the transactional data, we see the sales per square foot in offline stores, and look at the conversion figures. The next stage into it is the targeted segmentation which Google is using, that allows them to improve conversions by targeting specific cluster of consumer and finally what you will witness in next ten years is a combination of big data, IOT and pegged with artificial intelligence and machine learning. The non-transactional revenue stream, business will be able to understand it that you



don't need a merchandise, a store even a product to make money. The only thing you know to make money is to know about the consumers rather than sales per sq. ft.," said Chauhan.

Abel Correa, Head IT Strategy & Governance, Arvind Limited spoke on the Master Data Management (MDM) and its benefits. "We at Arvind, started using data primarily on the internal focus first, where our priority was operational efficiency as it helps in cost-cutting. Now we are moving towards the external focus which is customer focused. If we don't have sanity of master data, our messaging to the customer would get irrelevant. We adopted SAP HANA as our new platform and stretched upon the utilisation of master data management. As a result, we got a much more relevant customer engagement. Apart from delivering the service level at the store, master data

also helped us in positioning right level of styling and fashion."

Reuben Pandian, Chief Omnichannel Officer, TataCLiQ concluded the session by highlighting the 360-degree approach to the data. "90 percent of the data has been generated in last two years and as we speak now, we have five billion connected devices which will be around 25 billion in coming three to five years. So we are looking at a deluge of data coming to us from various sources. Given that scenario how do we manage that data and how do we redefine the ecosystem, how the e-commerce and offline players will have to deal in days to come. Data is the single entity which enhances or delivers the true customer experiences. The more data you give back to the customer, the more you will get back from them."

- With inputs from Sandeep Kumar

KEY SESSION HIGHLIGHTS

- What is Master Data Management (MDM) and what are its benefits
- How cell phone market uses the data and leverages the market
- 'Pay with data'
- Usage of enrollment form
- 360-degree approach to data
- The non-transactional use of data



THE FUTURE OF RETAIL COMPETITIVENESS: SMART SOURCING AND INTEGRATED RESPONSIVE SUPPLY CHAINS

POWERED BY GREYORANGE

– By IMAGES Retail Bureau

GreyOrangePte's vision is that bringing automation in the warehouse will not only help maximising efforts but also in improving the lead cycle time from manufacturing to the delivery to the end consumer.

Session Partner



Supply chains in today's world are continually under pressure for higher performance and lower costs. Companies around the world are turning towards technology to improve operational efficiencies in their warehouses, fulfillment and



Vikrant Yadav

distribution centers.

GreyOrangePte – an Indian startup – is one such company that dabbles in automation, primarily robotics. It is focused on transforming warehouses across the world and improving their productivity. The company has presence in Europe, South America, Japan and Asia Pacific.

The company's vision is that bringing automation in the warehouse will not only help maximizing efforts but also in improving the lead cycle time from manufacturing to the delivery to the end consumer.

At the India Retail Forum

2017 – held on September 19 and 20, 2017 in Mumbai – retail leaders met to debate *'The Future of Retail Competitiveness: Smart Sourcing and Integrated Responsive Supply Chains.'* At the session, powered by GreyOrangePte, panelists debated how in the current Omnichannel scenario, the customer is experiencing a brand in multiple ways and it is important to adopt automation that can reduce the lead time and deliver the product at the right time.

The roundtable was led by a presentation by **Vikrant Yadav**, Country Manager-India GreyOrangePte and moderated by **Suresh Chugh**, Head Logistics, Raymond Apparel Limited. The panelists included **Jayanta Ghatak**, SCM Head, Shop CJ Network India; **Sebin Thomas**, Head Supply Chain Management, Hypercity; **Mukesh Anjaria**, Magsons Super Market; **Shailesh**

Solkar, Head Merchandising and Supply Chain, Trent; **Manish Lal**, Logistics Procurement Lead Asia Pacific AMEA, **Mondelez**; **Sougoto Shome**, UP CAM Business Development, Future Supply Chain.

Across categories, retailers who have learnt the importance of managing an efficient supply chain are gaining the competitive advantage. From fresh ways to use data to new technology, getting to grips with the methods driving change in the industry are helping retailers quickly gain ground.

Vikrant Yadav,

Country Manager-India GreyOrangePte kickstarted the debated by talking about how his company is transforming warehouses. "We have seen technology being employed at the manufacturing level at a great scale today. We have also seen that technology being applied to access consumer behavior in the market and from a sales perspective. The only thing which is left in between where technology has not been so widely accepted is the warehouse. This is a place where a lot of capital is stuck, where technology enforcement can bring it back live into our businesses. Our endeavor has been to create ROIs and give more value to customers. Bringing automation in the warehouse will not only help in maximising effort but also

KEY SESSION HIGHLIGHTS

- Warehouses and technology
- Scope of digitalisation
- Technology and its implementation
- Adaptation of Artificial Intelligence



Suresh Chugh



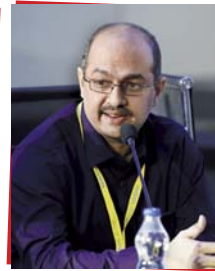
Shailesh Solkar



Sebin Thomas



Jayanta Ghatak



Manish Lal



Sougato Shome

improving the lead cycle time from manufacturing to the delivery to the end consumer.”

Yadav further defined point saying, “Retailers are always talking about their plans for 2020. What we need to understand is that the need to bring in automation at the warehouse level is the only way to embrace this future and actually achieve 2020 targets.”

Suresh Chugh, Head Logistics, Raymond Apparel Limited, asked the panelists about the scope of digitalisation and artificial intelligence, robotics and automation process at distribution centres – the last mile of delivery in any business.

Shailesh Solkar, Head Merchandising and Supply Chain, Trent, answered by saying, “In the current Omnichannel scenario, the customer is experiencing the brand in multiple ways. What is most important from the customer point of view – above product and pricing – is availability and

the lead time of service. So, it’s very important to adopt automation which can reduce lead time and deliver products when they are needed.”

Sebin Thomas, Head Supply Chain Management, Hypercity hinted at a change in the way of thinking, saying: “In new age businesses, the ‘on-time concept’ becomes much more important. If we see internally within the business and externally with the customers, the Omnichannel way is defying any convention. In short you can’t have different process running for different channels. Technology and its implementation at every level are the only way to merge all processes together so that it can improvise the overall productivity. In the meanwhile, we see progress as investments and the time taken to implement technology is becoming more comfortable for organisations in general.”

Agreeing and sharing his view, **Jayanta Ghatak, SCM**

Head, Shop CJ Network India, said, “We have to give as much convenience to customers as they demand. While this is a difficult proposition for a company, it is also the way to success. Businesses need to clearly identify how information will flow across different channels and how technology can help them do the same.”

He further stressed on the importance of adaptation of Artificial Intelligence to improve the supply chain logistics of a growing company.

Manish Lal, Logistics Procurement Lead Asia Pacific AMEA, Mondelez added to the discussion saying, “If the customer experiences improve, they will make the company win. For retailers to succeed in the industry they require collaboration with others in the industry. Retailers require a 3PL which can be customized at the last mile which is closer to the customer. For this, retailers

also need a logistics partner who is also flexible and has different fleets that can be tracked. Nevertheless, the efficiency of the whole supply chain has to be met to fulfill these wishes.”

Sougato Shome, UP CAM Business Development, Future Supply Chain described his journey saying, “Future Supply Chains had built its biggest warehouse in 2011-12 and at that point we were doing some 30-40,000 pieces of apparel from six different warehouses. At the peak of business, we would sometimes touch 70-80,000 pieces per day. Today we do 3 to 4 lakh pieces in a day and touch peaks of 5 to 6 lakh per day as well. We are able to do this because we started using technology. This improved our sorting efficiencies by 30-35 percent. We have evaluated our centres and we feel that we will be running out of the capacity very soon. To ensure that doesn’t happen, we have built a cross-belt sorter in Nagpur. This enables us to sort 1 million pieces per day.”

“Today investing in such technology becomes a bottleneck for many companies whereas if you look at the ROI it will be profitable in the 4-5 years with an investment in technology. The perception has to change and the technology investment for any company is a planned process,” he said, aptly concluding the debate.

– With inputs from **Gurbir Singh Gulati**





TRANSFORMING CUSTOMERS INTO ADVOCATES: DEFINING THE CONNECTED CUSTOMER EXPERIENCE

POWERED BY SURE SOLUTIONS

– By IMAGES Retail Bureau

Today's consumers are very demanding and selective. They want relevant, real-time and personalised interactions with the retailers and brands and they don't hesitate to abandon brands that fall short of their expectations.

Session Partner
SURE SOLUTIONS
 helping retail efficiency
 — powered by Deki —

The retail landscape has fundamentally changed, and gone are the days of spray-and-pray promotions and untargeted broadcast advertising campaigns that ignore customer preference and lifetime value. Today's Consumers are very demanding and selective.



Vinod Sharma



Alan Thomson



Ranjit Satyanath

They want relevant, real-time and personalised interactions with retailers and brands and they don't hesitate to abandon brands that fall short of their expectations. In order to transform customers into brand advocates, companies must develop a technology framework and strategy that enables the following tenets:

- Building emotional connections with the Millennials through 'purpose' driven branding and activations
- proactive notification on offers and packages on their preferred channel
- a seamless experience across channels

- contextual and personalised service
- enabling and empowering your customer associates with a 360-view of the offerings
- developing a next-generation customer engagement center that understands customer preferences

At the India Retail Forum 2017 – held on September 19 and 20, 2017 in Mumbai, experts, from the CEOs and Directors of successful brands met to debate on **'Transforming customers into Advocates: Defining the Connected Customer Experience'**

The panel included **Karthik**, Chai Point; **Anil Patel**, Chief Operations Officer, HotWax Systems; **Manoj Gupta**, Founder, Craftsvilla; **Saurabh Kochhar**, CEO, Foodpanda India; **Ranjit Satyanath**, CIO, Infiniti Retail (Croma); **Benazir Miller**, General Manager IT, Shoppers Stop; **Richa Vipran Kalra**, Founder, Candyskin; **Sharad Walia**, Brand Director, Park Avenue, Raymond. The session was co-moderated by **Alan Thomson**, Director IRISYS (UK) and **Vinod Sharma, MD**, Deki Electronics.

Route to Profit Maximisation

Vinod Sharma MD, Deki Electronics, began the session with a presentation in which he highlighted the key elements offered by SureSolutions. SureSolutions with its innovative I+I3 (Information, Intelligence, and Imaging) platforms aims to transform customers into advocates. Technically, SureSolutions is creating a bridge between technical problems and solutions by offering a wide range of benefits including:

- Providing Big data at your fingertips
- Map traffic flow (across stores, regions, and cities)
- Drill down for specifics (Learn about instore movement, plan efficient product placement, make the promotions work better)
- Digital Intelligence
- Combine legacy with the latest in RFID
- Track SKUs with ease
- Reduce errors to almost nil
- Redeploy human resources and increase efficiency and cut down costs
- See what works for you, what meets your budgets,



Benazir Miller



Anil Patel



Richa Vipran Kalra



Sharad Walia



Manoj Gupta



Saurabh Kochhar

what is scalable according to your needs

- Allow customers to see and select options, colours, choices virtually instantly

Alan Thomson, Director IRISYS (UK), analysed the role played by technology in gathering information on both online and offline platforms. “For an online retailer, it is easy to collect information; Google analytics will provide every minute detail of people visiting the website in a single click. But for a brick-and-mortar store, it is a difficult task. We provide IRISYS Vector 4D technology that offers people and crowd counting with accuracy in excess to 98 percent. It also provides customer demographic insights to determine a better understanding of shopper group of dynamics. The dwell monitoring of the software provides a greater understanding of customer engagement with merchandise and POP displays. We use the time of flight technology which is taking distant measuring, the beam of light is sent back to the collector, where it is mapped to give precise data by actually counting the people, hence distinguishing the demographics of the shoppers,” said Thomson.

Ranjit Satyanath, CIO, Infiniti Retail (Croma), emphasised on the additional value that technology adds to a brand and its business

saying, “We take loyalties very seriously in our stores. Why does a particular customer go and shop from a particular retailer or a brand? First thing is price, second is convenience and the third is experience. Retailers have to distinguish the offerings around these parameters. There is no real loyalty among customers. There are certain paths that the customer takes. Awareness, pre-purchase (research about the product), good service and feedback and only after this, the customer turns into an advocate,” he stated.

Benazir Miller, General Manager IT, Shoppers Stop, agreed saying: “I feel experience, trust and connects are extremely important in developing a long-lasting relationship with your consumer and technology plays the role of a driver which brings all three on one platform. What we are trying to do across all retail categories is to connect multiple channels in order to understand the customer shopping pattern.”

Anil Patel, Chief Operations Officer, HotWax Systems expressed his views from the Millennial perspective. “The brand experience and the cause are very important. The technology that we employ in our organisations has to be enabled. It must take care of feedback, care and direct connection with the customer

on all platforms. The Millennial consumer wants a continuous and active loop of connection. It should not be a one-time thing, but it needs to be something that keeps them engaged.”

Richa Vipran Kalra, Founder, Candyskin spoke on how to ensure customer loyalty and advocacy on a personal level. “Building a customer base is one the most important and difficult things to do. But once you do have them, you have everything. For CandySkin, I chose to go with an online portal and instead of going in for high-cost marketing, I opted for high-value marketing. I distributed around 1,000 bras for free and asked for honest feedback on the quality and comfort of the product. Brand advocacy with customer care is very important.”

“I empathise with my customer. I put myself in their shoes and think - ‘What will I buy, why should I buy that and from where will I buy it’. Thinking this way has helped me improve my merchandise mix and increase my retail footprint, which has culminated into bringing me more customers for my brand,” she added.

Sharad Walia, Brand Director, Park Avenue, Raymond, applauded Kalra’s idea of brand advocacy on the personnel platform and intelligently pointed out how bigger brands should carry

such ideas. “We are at a scale where we need to deploy more use of technology. Whether you call it advocacy or satisfaction, essentially what we all are trying to do is gauge the customer’s reaction and satisfaction to our services. Towards this, we have introduced an application called Litmus. As soon as a customer makes a purchase, a link is sent to his mobile with five-six objective questions in it. The advantage is that we get real-time feedback from the customer,” he said.

Manoj Gupta, Founder, Craftsvilla talked about how his brand figured out the white space opportunity in a scattered ethnic retail market. “In our business, product quality is very important. That is the only way we can get more customers on-board and keep them there.”

Saurabh Kochhar, CEO, Foodpanda India, concluded the session as he spoke about his company’s online buzz which was the outcome of their customer advocacy strategy.

“We focused on certain things to make purchasing food online more convenient for the consumer - controlled pricing, great service, and a fantastic experience. If you do not have a face to the brand, then the service has to do a lot more talking and we totally believe in this.”

– With inputs from Sandeep Kumar



SHOPPING CENTRES AS A COMPLETE LIFESTYLE DESTINATION AND THE THIRD HOME

POWERED BY BENOY

– By IMAGES Retail Bureau

Such is the influence of the shopping centres and modern retail in today's world that people are identifying these retail spaces as their third home. Customers today want to be close and attached to retail spaces – either in real life or on social media...

Session Partner

Benoy

Such is the influence of the shopping centres and modern retail in today's world that people are identifying retail spaces as their third home. Customers want to be close to and attached to retail spaces – either in real life or on social media. With no end in sight for the rise of online shopping, never has it been more important for retailers, shopping centre developers, city planners, and communities to work together

to create a new ecosystem of lifestyle destinations.

At the India Retail Forum 2017 – held on September 19 and 20, 2017 in Mumbai – experts from the shopping mall industry, entertainment and F&B sector met to debate on **'Creating a New Paradigm for the Success of Urban Centres: Our Shopping Centres as a Complete Lifestyle Destination and a Third Home'**. From rethinking the genesis of shopping centres, redesigning spaces, and bringing in innovative

TRIVIA #1:

Out of the twenty most popular Instagram photo clicking destinations in the world, nineteen are monuments with historical importance with one being a shopping mall, which is Siam Paragon in Bangkok.

TRIVIA #2:

Despite having the maximum number of skyscrapers and architectural buildings, the place with maximum daily footfalls in New York City is the Apple store.

concepts, the session discussed ideas focused on building a modern ecosystem for new a retail real estate landscape where F&B, leisure and entertainment will play a crucial role.

The panel included **Alok Tandon**, CEO, Inox; **Amit Sharma**, Managing Director, Miraj Entertainment; **Antoine Guillorit**, Head of International Development, LINA'S (France); **Bipin Gurnani**, CEO, Prozone Intu; **Bernard Chiew**, Managing Director - Asia Pacific, ILLYCAFFÈ (Italy); **Jonathan**

Yach, Director - Operations, Virtuous Retail; **Mukesh Kumar**, Sr. Vice President, Infiniti Mall; **Prashant Kanoria**, CEO, Unisport India (India partner of QubicaAMF); **Rajneesh Mahajan**, CEO, Inorbit Malls; **Stuart Rough**, Group Chairman, Broadway Malyan; **Tushar Dhingra**, Chief Executive Officer, Smaaash Entertainment. The debate was moderated by **Pankaj Renjhen**, MD Retail Services, JLL and **Terence Seah**, Director, Benoy (UK) who also gave the lead context-setting presentation.

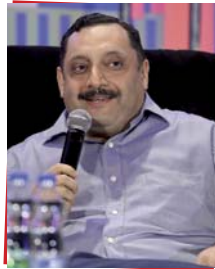
Seah started the session with a presentation talking about the history and evolution of the shopping centers and malls in the modern time. He categorised the history of malls in three phases, mainly 'Then Pre-Millennium (1830-2010), Now Millennium malls (2010-2017) and Future Bespoke malls (2018 onwards).' Even before the Pre-Millennium era, in most part of the world,



Stuart Rough



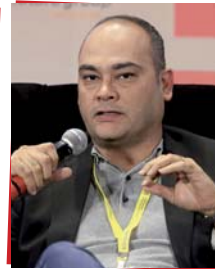
Rajneesh Mahajan



Bipin Gurnani



Terence Seah



Tushar Dhingra

retail was the part of the open street market thing and this concept is yet again coming back in modern era now. After few years, someone thought of putting a roof over it and Arcade market came into existence. After this, the concept of US strips malls, which were uni-layered non-engaging type of market build out of the towns. However, the introduction of open food courts, introduced a revolutionary concept of infusing food into the retail and this adaptation, changed the face of the shopping mall industry.

This led to the introduction of mega malls in dense cities, that were fully integrated with commercial and leisure offerings. Many city centres in Europe, started building and renovating malls with themes discovering the beauty and history of the respective cities as they provided integrated

environment to express animation and interest, both for the brand as well as individually. He also mentioned the need to adapt the trend of not building a new mall every now and then, but in reality, use the old building to your advantage.

Adding weight to this, **Stuart Rough, Group Chairman, Broadway Malyan** said, “The need of the hour is to refurbish and reposition the existing shopping centers. This need comes from within, urbanization, online threats and the fierce competitions. Content is changing every now and then. Leisure, entertainment, F&B and fine dining has increased the mix juice elements of the shopping centers. Urbanisation factor has made repositioning of shopping centres more comfortable.”

Emphasizing on how

the nature of market and behavior of customer going to these shopping centres changes from city to city, **Rajneesh Mahajan, CEO, Inorbit Malls** said, “Buying behaviour is different. Certain category will do very well in a particular area whereas it won’t get the same impact in the different part of the same city. Daily basis correction is done by the retailer, based on neighbourhood requirement and the local market whereas habitation and people living in the area matters to an extent.”

Bipin Gurnani, CEO, Prozone Intu drew parallel lines for shopping centres in Tier II cities. “Internet and media actually have brought a lot of exposure to the Tire II population. The customers there are having more and more aspiration and expectation desires. Managing expectation and aspiration of such unique

demands is a very tough task. So, a proper research and planning are needed before making a huge investment in Tier II cities. **Terence Seah, Director, Benoy (UK)** supported the argument and said “People like big brands but that doesn’t mean it is the whole offer. Local brands with spice and charged with social events in the picture are also a successful recipe for the shopping centre in both Tier I and II cities.

Tushar Dhingra, Chief Executive Officer, Smaaash Entertainment highlighted the need for games as a part of entertainment in the shopping centers. “We give gender neutral, age neutral and geography neutral centers. We curate and build our games. We core the fusion to play and we engage at a different level which involves social engagement angle that is entirely new. We also have games for students and corporate people for weekly and weekend crowds.”

Seah concluded the discussion by mentioning a quick note, “New malls in trend are ‘Neighbour Hubs’ which allow people to do whatever they want to do. The important thing is to connect with the Ethos (the brand story), Identity (both physical and digital) and Interaction as a communication tool. Today the shopping centre is not just a shopping centre, it is a new social community centre.”

– With inputs from Sandeep Kumar





DEMYSIFYING THE OMNICHANNEL HYPE

POWERED BY ARVIND INTERNET

– By IMAGES Retail Bureau

Omnichannel has been the buzzword of the retail buzz for the better half of the last decade now. Across boardrooms, investors calls, business planning meetings, and in-store, the word Omnichannel comes up as a perennial agenda item for most organised retailers across the world. But whether you call it Omnichannel, multichannel, “experiential retail” or even “new retail”, the reality is that a very few brands and retailers have a cohesive idea of their physical + digital roadmaps and more importantly, what this new way of servicing customers can really do for a retail business when it comes to core retail success measures...

Session Partner

Arvind internet

While Omnichannel visionaries paint the future of seamless, high-tech, intra-session, cross-channel journeys across the purchase funnel, most retailers still grapple with the basic realities of defining their Omnichannel vision and making the correct Ground Zero decisions towards realising it.

Amongst all the noise of new channels, e-tail innovation, in-store technologies, and Omnivanity metrics, retailers who excel in this new way of selling have managed so far to find a balance between the existential reality of going Omnichannel vs. getting sucked into a vortex of investments with lacking returns.

Against the backdrop of day-to-day realities of hyper-competition, rising retail costs of business, and productivity, these retailers are able to draw clear lines between must haves, nice to haves, and ‘pies in the sky’



Mukul Bafna

Omnichannel journeys. They are able to focus their retail transformation efforts and look beyond technology, treating Omnichannel as a fundamental change management process in their organizations to achieve true benefits.

At the India Retail Forum 2017 – held on September 19 and 20, 2017 in Mumbai – retail leaders met to debate *‘The Omnichannel Hype: Rethinking Retail to Create Delightful Consumer Journeys and True Retail Uplift’*. At the session, powered by Arvind Internet, panelists looked at Omnichannel beyond the buzzwords, hype, and and from the view point of industry practitioners who have delivered customer delight and ROI on

Omnichannel. Specifically, the panel addressed hard-hitting topics for retailers.

The esteemed panel included **Anshu Dubey**, Executive Director, Distribution Sector, IBM; **Atul Madan**, Director Retail, SSIPL; **Deven Pabaru**, Chief Strategy & Implementation Officer, Stellar Value Chain Solutions; **Kavindra Mishra**, MD & CEO, Pepe Jeans; **Uma Talreja**, Chief Digital Officer, Raymond; **HS Sidhu**, President, Mufti; **Pooraan Jaiswal**, CTO, Globus Stores; **Jaideep Shetty**, Co-founder & MD, Minerals Fashion.

The session was moderated by **Mukul Bafna**, Co-founder and CEO, Arvind Internet.

To put things in context, **Mukul Bafna, Co-founder and CEO, Arvind Internet** kickstarted the discussion by talking about how retailers can get their Omnichannel strategies right. He said, “We need a well sequenced approach to get ROI from our businesses and for this we need an Omnichannel playbook. A key principal is to keep your business features centered around consumers.



Atul Madan



Kavindra Mishra



Anshu Dubey



Uma Talreja



HS Sidhu



Jaideep Shetty

Understand your customers' need and build channels to help them in their shopping journeys. Omnichannel is a transformation journey, so the playbook needs to be sequenced in a manner that helps you create a futuristic roadmap."

Atul Madan, Director Retail, SSIPL began the interaction by talking about Nike's Omnichannel journey. He said, "We run close to 170 stores for Nike in India. We have rolled out an Omnichannel strategy for around 18 months, and we concentrated on maintaining hygiene in inventory and supply chain. It has given us incremental sale of around 5-7 percent. But an Omnichannel strategy doesn't mean that we are competing

with the e-commerce business of our own brand."

Kavindra Mishra, MD & CEO, Pepe Jeans added, "Omnichannel has to add value to the consumer experience. Inventory turnover operations play a very important role in creating this experience as well as technology intervention. Within six months we are planning to come up with both e-commerce and Omnichannel retail interfaces."

Giving his take on Omnichannel, **Anshu Dubey, Executive Director, Distribution Sector, IBM** stated, "Omnichannel is a journey from brick to clicks. The roadmap of a brand needs to be very clear - where do you want to lead so that the various formats and

alternate channels of your business don't cannibalise each other's profits"

Uma Talreja, Chief Digital Officer, Raymond added, "A lot of us talk about Omnichannel as a supply and fulfilment experience and there are lot of operational efficiencies which are related to it. But, as a brand, we at Raymond believe that we need to gauge and regain consumer trust and experience to save the sale."

Talking about how Mufti is marrying the Omnichannel strategy between COCO and FOFO stores, **HS Sidhu, President, Mufti** said, "If any franchisee is serving the customer on behalf of another franchisee of the same brand, I have no problem giving them extra margins. We all are

multi-channel and my idea of Omnichannel is to navigate between mediums. We are at the nascent stages of doing this, but we are focussed on making big of it. I will lead my Omnichannel strategy from my stores."

Jaideep Shetty, Co-founder & MD, Minerals Fashion concluded the debate talking about Minerals Omnichannel strategy: "We faced loss from in sales at our shop-in-shop models. We would lose sales on account of size. To counter this, we are launching an app soon. Now, with the app, we're assuring accessibility. We want to go Omnichannel just to drive our sales strategy, bring online consumers instore and vice versa."

- With inputs from **Sandeep Kumar**

HP ELITEPOS ENTERS RETAIL PAYMENT MARKET

“We announced our product, ElitePOS, at the India Retail Forum 2017. The ElitePOS takes a fresh look at what a point of sale terminal should be in terms of how the needs of retailers are changing and how the demands of consumers and shoppers in stores are evolving. It's a very exciting product, it is entirely focused on the durability, versatility, and performance. We collected retail input insights from retailers and customised the ElitePOS as per their needs. Some of its unique features are: enhanced security; improved performance and design; versatility so the POS can be used as an interactive display or even a self-service device.”

- Aaron Weiss,
Vice President and General Manager Retail Solutions Business Unit (GBU), HP



THE FUTURE TELESCOPE RETAIL 2030: WHAT IT WILL TAKE TO GET THERE & RULE THERE

– By IMAGES Retail Bureau

Retail chains around the world are facing an increasing margin squeeze – from changing consumer behavior, new store formats, rising complexity, supplier consolidation, and other factors. Retailers need to take new approaches to improve operations and boost competitive advantage...

Session Partner



Over the past decade or so, the Indian retail industry has emerged as one of the most dynamic and fast-paced industries due to the entry of several new players. India's total retail market has grown at a CAGR of 14.7 percent since 2014 to reach the size of ₹5,531,471 crore in 2016. It accounts for over 10 percent of the country's GDP and around 8 percent of the employment.

India, currently is the world's fifth-largest global destination in the retail space, surpassing China as the most promising and reliable market for the retail expansion. India's high economic growth, strong positioning an investment hub, the stable government from the world perspective, economic and tax reforms, improving market sentiments, large earning and spending young population, burgeoning e-commerce, digitalisation at the domestic level will act as main driving factors in the retail market growth in days to come.

Mobile phones, Internet, data, shopping apps, Amazon,

and Flipkart etc. have changed how consumers live, think and shop. And the changes are only going to accelerate in the coming years. Retail chains around the world are facing an increasing margin squeeze – from changing consumer behavior, new store formats, rising complexity, supplier consolidation, and other factors. Retailers need to take new approaches to improve operations and boost competitive advantage.

At an IRF 2017 session *'The Future Telescope: Retail 2030: What It Will Take to Get There And Rule There,'* Samik Roy, Director & Country Head (Dynamics) Microsoft India talked about empowering retailers, digital disruption and the Fourth Industrial Revolution.

He started with an example of a lady on holiday in Italy, and she wants to shop. So, she asks the Microsoft Digital Assistant, Quotana, what tourists buy in Italy and where she can get it from. Quotana gives her options and then even fixes an appointment at a store for her when she makes up her mind. The store already knows she is coming, and the store assistant knows exactly what she is looking for. Meanwhile, Quotana also informs the store assistant

that the particular SKU which the lady is buying is in demand, selling fast, and might be out of stock soon. The store assistant places an order with his warehouse to replenish his inventory. Everyone goes home satisfied!

Bridging the Online-Offline Divide

Today's generation of consumers prefer going to the online space first for buying anything.

When the consumer comes to your online store, there are no timings. It's not a 10am to 8pm shop. It is 24*7*365 shop. You can browse through any brand you like, at any time of the day and even connect with people who have bought those brands before, find out about discounts, delivery times. In an offline store, only an in-store assistant is available at particular timings. So, how do you bridge this divide? And it's very important that this divide be bridged.

The retail industry is going through a massive digital transformation – the Fourth Industrial Revolution. The revolution is changing the way consumers are behaving, their expectations and is forcing retail organisations to think differently, and to

change their processes to accommodate the consumer.

The first revolution was about the steam, that's when machinery came in, people moved from manual work to machines and the machines were driven by steam. The second revolution was when electricity came in, machines became bigger and they became faster. The third revolution was when IT came into space – we got in processors, started automatic processes to make things faster. We brought in the whole era of productivity. The fourth era of revolution is taking the productivity to a higher level where we talk about automating things faster and everybody being more and more productive. And that cannot happen if employees in a store or even online (those interacting with consumers) are not empowered. Employees need to be empowered with consumer information, as well as product information so they can provide a better consumer experience.

The second most important aspect of succeeding in



Samik Roy

retail is understanding and using Big Data, Artificial Intelligence and analytics. We need to use data proactively, preventively and even post-operatively.

Big Data has qualified that the experience online commerce gives consumers is much higher and more satisfactory than in-store. How are retailers then going

to bridge the online-offline divide? One way to do it is to train store assistants to be commerce agents- they provide personal attention, help suggest and select items, look up the inventory to see if sizes, colours etc. are available and more. They also need tablets which can give computed big data results and tell them the

consumer's buying history in that particular store, so they can make suggestions accordingly. Finally, paying online is easier - it takes literally a minute to type in your card details or choose the Cash on Delivery option. In-store lines on the other hand are a pain point. The idea is to ensure that your commerce agent can

complete the billing process for the consumer on the company tablet / phone.

The way forward for retail is to go Omnichannel, close the gap between online and offline commerce, provide the exact same consumer services and satisfaction on all mediums.

- *With inputs from Sandeep Kumar*

GET NEW SHOPPERS INSIDE YOUR STORE! FIND OUT HOW?

POWERED BY QOIE

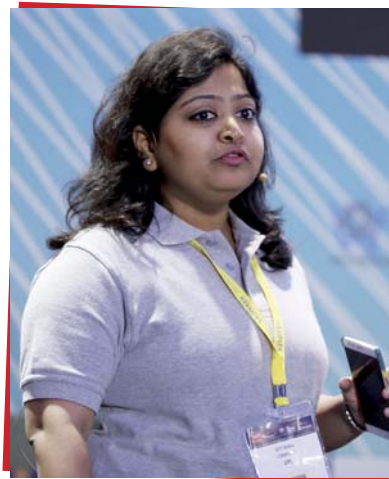
How often do you feel worried that your brick-and-mortar shop is becoming irrelevant? If your answer is - 'often,' get ready to be surprised!

Even today, approximately 96.5 percent of the retail sales happen at brick-and-mortar retail outlets. The real problem is lack of awareness about you as a brand; and the reason for this is quite obvious - everything they need, is right there in their pockets.

Ironically your biggest foe can now become your biggest friend, thanks to QOIE!

QOIE is a location based information platform, which helps one to shop smart by finding the shops one is looking for and giving them all the information about it with a click of a button in their smartphone. Your customers spend a sizeable amount of their time, glued to their smartphone. This will work to your advantage, because every time a customer searches for the category of products that you offer, your store will be presented to him. With all the relevant information presented to the customers like exact location, distance, brands offered, store timing, contact details, discounts being offered and reviews of other shoppers, they will easily be sure about which store they have to visit; and you will never miss a potential customer.

"We at QOIE, do not just broadcast offers and discounts but provide collected information about all types of sales, verification through machine level and Artificial Intelligence," said **Aditi Banka, Vice President Operations at QOIE** in her presentation titled '**QOIE: Get New Shoppers Inside Your Store! Find Out How**,' at the India Retail Forum 2017 held on September 19th - 20th in Mumbai.



Aditi Banka



Session Partner

BRAND JOURNEY: In 2015, Laranya Infoedge, QOIE's parent company came into existence.

Brand QOIE was an outcome of a boardroom idea after officials at Laranya Infoedge realised that a lot of retailers faced difficulties in getting hold of comprehensive lists of potential distributors and retailers.

QOIE the brand was coined in mid-2016 and by the end of that fiscal, it launched operations in nine cities, across 22 categories. With a focus on Eastern India, QOIE launched stores in Kolkata, Jamshedpur and Bhubaneswar.

"By the end of the next quarter of 2017, we plan to launch stores in five more cities in India's eastern zone and by the end of this fiscal, our plan is to extend in 10 more cities in the North and Western zones of India," said Banka.

BRAND ACHIEVEMENTS: 93 percent malls in eight East Indian cities are clients of QOIE. With 400+ national brands, 10,000+ retail outlets listed on QOIE, the platform is boon to shoppers and shopkeepers alike. The ultimate goal of QOIE is to be the most preferred retail search and discovery platform for the entire retail ecosystem - retailers, consumers, shopping malls, brands & companies that create these brands! Now, the store owners never have to worry about being discovered! "We have 400+ plus brands on the national platform and we have over 1 million searches on brands and products and stores. So that is QOIE, search online, shop offline," concluded Banka.



INTEGRATED RETAIL STRATEGY- RETAIL CUSTOMER EXPERIENCE

POWERED BY SAP

– By IMAGES Retail Bureau

This is the right time to forge strong relationship with customers so that they stick to a brand and keep coming back for more. The time is also ripe to take a look at how leading retailers are innovating with Omnichannel commerce and technology, allowing them to deliver an exceptional shopping experience across every touch point...

Session Partner



The lines between channels of sale are becoming more blurred than ever before, and retailers all over the world are hard-pressed to cater to the consumers' expectations



Kashyap Mehta



Sandeep Jabbal



Sandeep Mistry

of high-quality service – then whether the consumer be in the dressing room of a physical store or loading up their online cart. This is the right time to forge strong relationship with customers so that they stick to a brand and keep coming back for more.

The time is also ripe to take a look at how leading retailers are innovating with Omnichannel commerce and technology, allowing them to deliver an exceptional shopping experience across every touch point.

At the India Omnichannel Forum 2017 – held on September 19th and 20th in Mumbai, concurrently with the India Retail Forum –

retail leaders met to debate *'Integrated Retail Strategy- Retail Customer Experience'*. The roundtable, powered by SAP, discussed the global perspective of Omnichannel and how it created the best experience to meet customer needs and demands.

The esteemed panel included **Govind Shrikhande**, Chairman, IRF'17 and CCA and MD, Shoppers Stop; **Sumit Sharma**, COO, Lacoste India; **Vikas Gupta**, Chief Executive - Lifestyle Retailing, ITC Ltd; **Abel Correa**, Head IT Strategy & Governance, Arvind Limited; **Anil Shankar**, CCA & VP, Shoppers Stop; **Kunal Mehta**, GM IT - Lifestyle

Business, Raymond; **Kashyap Mehta**, Head E-Commerce, Tata CLiQ; **Meheriar Patel**, Chief Technology Officer, The Mobile Store; **Prachi Mohapatra**, CMO, Fbb, Future Group; **Sandeep Jabbal**, IT Head, Marks & Spencer; **Sandeep Mistry**, IT-Head, Aditya Birla Fashion & Retail, Pantaloons; **Sauvik Banerjee**, CTO, TataCLiQ, Vice President- Tata Industries- Digital Initiatives, Advisory to Group Cos; and **Saravana C**, Head Applications, Spar.

The session was moderated by **Sam Alkharat**, Global COO, SAP Hybris.

Kashyap Mehta, Head E-Commerce, Tata CLiQ, briefly talked about the global perspective of Omnichannel and how his brand has inculcated it. "We have built a platform that can actually sync 10 million records of inventory in fifteen minutes. The key to succeed at Omnichannel is primarily based on two things. One is real-time visibility of inventory and the second thing is how your backhand data warehouse is going to power analytics, resulting in customer experience becoming seamless," he said.

When asked about how TataCLiQ takes care of the supply chain of the retailers, Mehta elaborated, "We do everything end-to-end for a retailer, also helping them with the logistics. If the retailers demand more, we provide them with different models."

He said that the biggest pain point in the e-commerce industry is the challenge of streamline the return and exchange of products.

"TataCLiQ's journey can be classified into acquisition, activation, and activity. At the Acquisition level, we are



Saravana C



Prachi Mohapatra



Kunal Mehta



Abel Correa



Vikas Gupta

still in the phase of acquiring brands and marketing the platforms for the promotion of the brands. At the Activation level, we majorly focus on the quadrants that we have developed. The Activity phase is when we see the volume rise, from an Omnichannel order point of view, we see 40 percent of such transactions taking place," he added.

"A lot depends on the retailer, his infrastructure and the type of PoS technology deployed by them. PoS terminals used by a number of retailers are offline, but to counter these challenges in real-time web PoS terminals are becoming a necessity. Since building an Omnichannel model is complex work, retailers must adopt technology, which makes their processes flexible, their platforms agile," he stated.

Sandeep Jabbal, IT Head, Mark & Spencer, agreed with Mehta, saying: "Our challenges are typical ones. Whether a customer buys our product from Amazon or Myntra, they are still our customers. These people sometimes want to return products they have bought online in stores, and this is pain point for us – since our invoices don't match with those of Amazon and Myntra. Then there is the fact that consumers want similar loyalty points not with standing the platform they

are using to make a purchase. Technology needs to be brought in here to ensure that the consumer gets what he needs – returns at physical stores, same loyalty points. Technology needs to be adopted which can handle cross-platform issues."

Sandeep Mistry, IT-Head, Aditya Birla Fashion & Retail, Pantaloons said: "We are focused on our 8 million customer base and our own loyalty program. We don't want any markets or customers from outside. If Omnichannel can provide the same experience for consumers both offline (connecting all our stores in all cities) and online – same promotions, pricing, quality and styling – then, Omnichannel is the way ahead for us."

Saravana C, Head Applications, SPAR also highlighted some of the major challenges that his company is dealing with, saying: "The major challenge that we are facing at SPAR is the offline promotion engine that we have. The promotion options are endless. We come out with different ideas to promote a particular brand, but there is no straight fitment to catalogue. On the other hand, in brick-and-mortar there is a fitment where we can run more than 25 engines. When we talk of Omnichannel, we should mean the fitment between online and offline marketing."

Prachi Mohapatra, CMO, Fbb, Future Group emphasised on the importance of applying technology to forward loyalty-based programs for an increased consumer base. She said this was her focus area to bring in more consumers.

Meanwhile, **Kunal Mehta, GM IT - Lifestyle Business, Raymond** said that his company had a very unique issue.

"From the Raymond perspective, the dilemma is that we have so many brands, but the same set of customers is going to all these brands. We need to map same customer through different journeys across different formats and channels. We also have an online marketplace and we need to work to increase the sale around it. Giving the customer the same experience across all platforms is the key to success for a company like ours," he said.

Abel Correa, Head IT Strategy & Governance, Arvind Limited highlighted the areas where Omnichannel strategy has not delivered successful results. "We also had Omnichannel and we haven't seen the success. We developed our own platform around and tools we choose it didn't work out for us. And one of the major challenge challenges that we faced in this was promotion. And the bigger problem is that

the loyalty points are being valued by the customer along with the promotion campaign cost. We were able to generate only 10 percent of the target from this platform."

Vikas Gupta, Chief Executive - Lifestyle Retailing, ITC Ltd,

supported Correa's comments saying: "We need to get real about the business and find out what would strike a trade-off out of it that is actually going to benefit the financials. My conclusion is any technology is a good selling job than a good buying job. But nothing is getting us done on our priorities apart from commercial trading. I am trying to seek that answer."

The panelists relatively agreed and concluded on the note that it's the customers' approach that unleashes the need of Omnichannel. Probably marketing doesn't have a platform to unify it and that it is time to bring in technology partners to take the idea of Omnichannel further. Some of the ways to move towards Omnichannel are segmentation, offering, connecting different age groups, creating a bridge between heavy and light users, offering attachments to the mobile category. If these challenges are fulfilled by a technology platform, then it becomes easier for the business to function.

- With inputs from Sandeep Kumar

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