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Future of Businesses
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THE INSIDE STORY

**WHAT MAKES FASHION RETAIL
THE MOST PROFITABLE SEGMENT
FOR MALLS**

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The Indian Fashion Retail Industry has helped the country's ever-conscious fashion consumers move away from the old saying – 'When in doubt wear red.' The industry is on a growth trajectory. With around 400 international and national fashion brands operating successfully in the Indian market, it is boom time for the sector. India's large Millennial population is becoming more and more fashion sensible, owing to the penetration of the Internet and technology. This, as well as the shooting popularity of social media, has opened unprecedented retail opportunities for the fashion industry.

In our March 2018 issue – in keeping with our upcoming flagship event, India Fashion Forum on March 13-14, 2018 in Mumbai – we take an insightful look at the inside story on what makes Fashion Retail the most profitable segment for Indian malls. The cover story analyses change in consumer income and demographic profile, and the role technological innovations, cultural shifts, social media and brand endorsements play in the growing standing of fashion retail within malls.

This Fashion special edition also brings success stories of various CEOs including Manjula Tiwari, CEO, Future Style Lab and Rajesh Jain, Managing Director & CEO, Lacoste India, two brands that are India's leading modern trendsetters in the fashion retail sector.

The issue's Retail Dynamics section takes a look at the ethnic wear segment, which is in its revival phase as more malls across India are giving more space to ethnic wear brands. Apart from this, there are reports and studies that promise to be riveting reads.

As always, we hope you find the issued informed and beneficial. We look forward to seeing you in large numbers at IIF 2018 at Renaissance, Powai in Mumbai next week.



Amitabh Taneja

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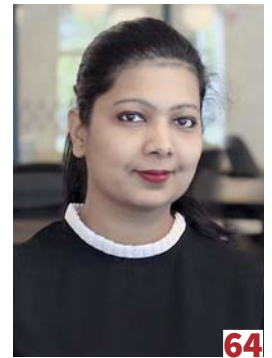


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[COVER STORY]

THE INSIDE STORY: WHAT MAKES FASHION RETAIL THE MOST PROFITABLE SEGMENT FOR MALLS

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INDIAN RETAIL SECTOR FOCUSSES ON ONLINE SERVICES, PHYGITAL EXPERIENCES

- By IMAGES Retail Bureau

H&M, Landmark and Raymond Group make major inroads in expanding their presence in the Indian retail market. Here's a look at some of the major activities in the sector in the last one month...

H&M INDIA TO MAKE ONLINE FORAY LATER THIS YEAR

Swedish fashion retailer Hennes & Mauritz (H&M) is planning on launching an online store in India this year. According to PTI, the multinational retail giant nets around 12 percent of global sales volume from online now.

"We plan to launch our online store this year," Janne Einola, Country Manager, H&M India was quoted by PTI as saying without giving a timeline. "As of now we will not be integrating our physical stores with online operations, but we will evaluate the business as it goes along," he was further quoted by PTI as saying. The company will not tie up with any of the online marketplaces and

will go solo for online sales. Deliveries would be undertaken by a third-party logistics partner," added Einola.

H&M India posted about a twofold



spike in sales at over ₹955 crore for the fiscal to November 2017, making India one of its fastest-growing markets. Its sales stood around ₹490 crore in 2016. On the physical stores front, it is planning to open two more stores in the Mumbai metropolitan region this month, and one more in Mysore later this year.

"Currently, we have 29 stores, including the two new ones in Mumbai, and we will add one more in Mysore. We have been adding one store a month since we began operations a little over two years ago," stated Einola, adding that 75 percent of H&M stores are present in large metros, but going forward the brand plans to focus on smaller cities as well.

BEING HUMAN ENTERS TAMIL NADU; OPENS FIRST STORE IN CHENNAI

Bollywood superstar Salman Khan's Being Human Clothing operating as the retail division of 'The Mandhana Industries' has forayed in Tamil Nadu market by setting up of its first company outlet store in Chennai. According to a PTI report, The Being Human Clothing store is spread across 1,322 sq.ft. and is nestled in Palladium Mall at Velacherry.

"We are proud to announce our maiden exclusive store in Chennai at Luxe Mall, Palladium. This will be our fourth addition in the South Indian market," said Manish Mandhana, CEO, The Mandhana Retail Ventures Ltd. to PTI.

In the Southern market, the company currently has stores in Bengaluru, Hyderabad, Kochi. "By next month we will be opening a store in Coimbatore. The company would have opened 15 new outlets before the end of the current financial year across the country. The company has exclusive stores in 45 cities across the country and also retailed through shop-in-shops, distributor networks and in online portals," added Mandhana. Being Human was launched by Salman Khan in 2012 has a footprint in over 15 countries with over 600 points of sale.



LANDMARK GROUP LAUNCHES 'HAPPINESS MOVEMENT' IN INDIA

Landmark Group, Dubai-based retail and hospitality conglomerate and the parent company of leading retail and hospitality businesses: Lifestyle, Max Fashions, Home Centre, easybuy, Splash, Spar Hypermarkets,

aim to bring a positive change by empowering our people, and instilling the values of ownership, pride and belongingness within them," said Nisha Jagtiani, Executive Director and Chief Happiness Officer, Landmark Group,



Fun City, Landmark Online India and Krispy Kreme, unveiled the 'Landmark Happiness Movement' impacting over 20,000 employees across all its offices, warehouses and more than 400 stores in India.

"Through the Landmark Happiness Movement, we

"The Landmark Happiness Movement further strengthens our value proposition to our people and we aim to nurture a happier work environment," said Venkataramana B, Group President - Human Resources, Landmark Group India.

SWEDISH WATCH BRAND DANIEL WELLINGTON FORAYS INTO INDIA



Swedish watch brand Daniel Wellington has opened its maiden store in the Fort area in Mumbai. "India is an emerging and vibrant market with huge potential.

Our increased presence enables us to accelerate our global expansion and it further reinforces our commitment to grow our business in the region," Roger Kylberg, CEO of Daniel Wellington, said in a statement. The store is spread across

1,000 sq.ft. and will house the brand's accessories for men and women. The store houses most popular series' such as the Dapper, Classic and Classic Petite collection ranging between ₹10,000 -14,000.



RELAXO INAUGURATES FLAGSHIP STORE IN SILIGURI

Relaxo, India's leading footwear brand launched its first exclusive store in Siliguri. The outlet is truly a shopper's paradise offering an attractive range of fashionable footwear for men, women and kids. It houses the widest range of Relaxo popular brands like Flite, Bahamas, Sparx, Schoolmate, Maryjane, Boston and Kidsfun.

The store is located at high traffic area, aims at providing brand enthusiasts of all ages a greater accessibility and an opportunity to explore more than 400 designs of sports shoes, casual, lifestyle shoes, sandals, flip-flops, formal wears, home slippers and office wears.

"The Relaxo brand remains focused on new designs, comfort and availability with a commitment to constant quality. The new store will provide customers with an enhanced retail experience. Relaxo is looking forward to leveraging the market potential in East region," said Nitin Dua, Executive Director, Relaxo Footwear Ltd.



RAYMOND GROUP TO INVEST ₹425 CRORE IN MAHARASHTRA

The Raymond Group, under JK Investors (Bombay) Ltd, signed pacts worth ₹425 crore with the government of Maharashtra. As per the MoU, signed during the

permissions, registrations, approvals, clearances, fiscal incentives.

The project would commence in FY 2018-19. The first MoU is to set up a School



Magnetic Maharashtra Investors Summit, the State government will facilitate JK Investors (Mumbai) to obtain necessary

Project and Sports Complex, while the second one is for setting up a residential complex with 2,000 houses in Nandgaon Peth, Amravati.



INTERNATIONAL RETAILERS KEEP UP THE PROFIT BLITZ

– By IMAGES Retail Bureau

New partnership deals, mergers and acquisitions, signing and resigning of top managerial employees – a lot rocked the international retail market’s boat in the past month. We bring you the details...

NATURE REPUBLIC OPENS FIRST OUTLET IN INDONESIA

➔ South Korean cosmetics company Nature Republic has opened its first outlet in Indonesia. The store is in Jakarta shopping mall and posted 100 million (\$94,000) in sales on its pre-opening day, the Seoul-based company said.

“We will expand our presence in the overseas market, including the Middle East and Europe, in the long-run, with Indonesia as our outpost,” the company said.

Nature Republic plans to operate up to 10 outlets in Indonesia by the end of this year. The company has stores in 17 countries, including China and Vietnam.



AUSSIE RETAIL START-UP STOCKINSTORE SIGNS ICONIC BRAND KOOKAI

➔ stockinstore, an Australian start-up offering real-time stock visibility for Omnichannel retailers, has signed iconic women’s clothing brand, Kookai. With 37 stores across Australia and New Zealand, Kookai is a favourite among celebrities and fashionistas and can be found in the wardrobes of women of all ages. Kookai implemented stockinstore on their Shopify websites for their Australian and New Zealand customers. Penny Iredale, Kookai National Retail Manager, said stockinstore was enhancing their customers’ shopping experience.

“We know our customers tend to browse online first, but then love to come into the store with friends to try on products before making a final purchase decision. With stockinstore, our customers can be sure the product they want is available in a store nearby, and that drives foot traffic to the right locations,” said Iredale.

stockinstore’s co-founder Gil Blackstone expressed his happiness over partnering with another iconic fashion brand. “Kookai trusts stockinstore as the best solution to deliver a shopping experience which meets their customers’ expectation,” said Blackstone. For Kookai IT Manager Kieran McEvoy, stockinstore was an affordable and easy to install solution for retailers. “It made sense to use stockinstore because it’s proven to deliver results,” he said. stockinstore drives foot traffic into store by showing online visitors which stores nearby have the item they are looking for. When it’s used, stockinstore converts online at over 7.5 percent, far higher than most other applications. With stockinstore, international fashion giant GUESS Australia increased their annual online revenue by over US \$400,000.

NIKE IS FIRST BRAND TO SELL ON SNAPCHAT; AIR JORDANS III 'TINKER' SOLD OUT IN 23 MINS

 Nike pre-released its Air Jordan III 'Tinker' sneakers on Snapchat with same-day delivery after the NBA All-Star game. The sale was only available to attendees of a after party following the NBA All-Star game and through a collaboration between Snap Nike's Jordan brand, Darkstore and Shopify, TechCrunch reported.

Attendees of the Jumpman All-Star after party in Los Angeles could scan Snap codes to receive the Air Jordans by 10:30 p.m. the same night. The Snap code brought them into the Snapchat app to complete the purchase. The shoes sold out within 23 minutes and Darkstore, an 'invisible retailer' startup, made the deliveries. As per TechCrunch report, Darkstore works by exploiting excess capacity in storage facilities, malls and bodegas and enables them




to be fulfillment centers with just a smartphone. The idea is that brands without local inventory can store products in a Darkstore and then ship them out the same day.

The official release of the shoe isn't until March 24, but Nike wanted to do something extra special in celebration of the 30th anniversary of Michael Jordan's slam dunk in 1988. "Jordan Brand and the Jumpman represent greatness, so we hold ourselves and our partners to that standard to create distinct and meaningful experiences for our community," Jordan Brand, Senior Director of Global Digital Dan Harbison said in a statement to TechCrunch.

"To execute on that, we worked with some of the industry leaders in this space. Snapchat had an existing partnership with Shopify to create the frictionless commerce experience, so we felt that would make sense. We had also talked to Darkstore and liked their same day delivery solution and learned they had partnered with Shopify in the past, so that became an easy decision," he concluded.

JEFF KIRWAN, PRESIDENT & CEO, GAP FLAGSHIP BRAND, STEPS DOWN

 In a statement to media, Gap announced that Jeff Kirwan, President and Chief Executive of its eponymous brand will leave the apparel retailer. Kirwan joined Gap Inc. in May 2004 from Target and has also contributed to Gap and Old Navy's growth in China.

"We have not achieved the operational excellence and accelerated profit growth that we know is possible at Gap brand. As we move into the brand's next phase of development, Jeff and I agreed it was an appropriate time for a change in leadership," Art Peck, CEO, Inc said in a statement.

Brent Hyder, current Gap Executive Vice President, Head of Global Talent and Sustainability, will oversee the brand as the retailer looks for new President.



REVLON ANNOUNCES GLOBAL FRAGRANCE LICENSE WITH CONTEMPORARY FASHION BRAND ALLSAINTS

Revlon, Inc., a leading global beauty company, has announced that it has signed an exclusive global license

agreement with contemporary fashion brand AllSaints Retail, Ltd. for the development, marketing, and distribution of fragrances and ancillary products. Established in 1994, AllSaints is a global, contemporary brand with an independent spirit, known for its iconic biker jackets and creating apparel and accessories for men and women around the world.

"We are proud to partner with an industry leader, Revlon, to launch the AllSaints fragrance collection. Revlon's strategic approach is perfectly aligned with our brand vision and global growth focus. As a brand, AllSaints

is recognised globally for its fashion-forward, contemporary, ready-to-wear and bag collections and we look forward to creating a fragrance collection with Revlon which embodies these attributes," said William Kim, CEO of AllSaints.

"We are thrilled to partner with AllSaints, and strive to translate their unique perspective on fashion to the world of scent," said Serge Jureidini, President, Revlon, Elizabeth Arden and Fragrances at Revlon. AllSaints impressive footprint and customer-centric mindset is perfectly aligned with Revlon's strategy and our focus to accelerate our global business," he noted.



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RAYMOND TO EXPAND ETHNIX AND NEXT LOOK; INTRODUCE KHADI-SPECIFIC BRAND

– By Charu Lamba

Given that the VUCA environment is intensifying and given Raymond's commitment to providing growth opportunities for internal talent, the company has reshuffled its top brass, and has decided to push forward some of its promising sub-brands...



Over the last century, change has been a constant parameter in India; the entire nation and its people have grown from strength to strength on all frontiers. And, in Indian fashion retail, it is Raymond

Group, which has best exemplified this essence.

The brand has been successful in climbing the stairs of success despite several unforeseen, high magnitude disruptions including excise levies, demonitisation, and GST, over the last two years. Given that VUCA environment

is only intensifying and given the company's commitment to providing growth opportunities for internal talent, the brand has promoted Bidyut Bhanjdeo to the post of Brand Director – Ethnix, Next Look and Raymond Khadi.

Both the sub brands 'Ethnix' and 'Next Look'

have emerged as two new, high-growth opportunities for Raymond in the past one year.

In an exclusive interview, Bidyut Bhanjdeo said, "Ethnix is all about ethnic wear, a major player in the ceremonial wear segment. 'Next Look' on the other hand is an economy range full wardrobe solution

RAYMOND RESHUFFLES LEADERSHIP:

Sanjeev Rao gets trade sales and relationship in addition to current portfolio

Over the last three years the Raymond Apparel SBU has made bold and successful strides on its exciting journey towards the twin Vision 2020 objectives of:

- (a) Delivering Unprecedented Growth
- (b) Transforming the Business model and processes.

This success has been achieved despite several unforeseen, high magnitude disruptions like excise levies, demonetisation, GST, etc. in the last two years. Given that VUCA environment is only intensifying and given the company's commitment to providing growth opportunities for internal talent, the following senior-level changes in the Apparel team have been announced.

The Raymond Management has named Sanjeev Rao as Director – Trade Sales & Relationship for Raymond Apparel Ltd, while continuing to oversee his current portfolio of Business Development.

Rao will also assume leadership responsibility for Sales and Distribution for Park Avenue Womenswear as well as International Markets (Apparel), thus further consolidating all trade sales and relationship activities in the Apparel business under one vertical.

The National Sales team – Park Avenue Women will now come under Rao's purview, and under his leadership.

ABOUT SANJEEV RAO

- Rao joined RAL in 2015 as Director – Business Development delivered spectacular results in a short span of time by inducing rigor and structure in the BD processes, while simultaneously delivering an unprecedented expansion and awareness blitzkrieg for Raymond group's retail portfolio.
- He has set up a highly engaged and result-orientated team that exudes his trademark high energy, and his "nothing-is-impossible" attitude, driving growth and change at high speed, by creating rigorous processes and highly engaged teams.



comprising of formals, casuals, accessories and footwear."

"We have tied up with the KVIC board to sell *khadi* products through a newly introduced brand called Raymond Khadi – The Story Respun," he added.

Ethnix and Next Look were launched a couple of seasons back. The two brands were test-marketed to check what worked and now Raymond is planning to launch these brands in full swing. As far as Raymond Khadi is concerned, it is expected to be introduced next month.

All About Ethnix

Raymond is pitching Ethnix as a stylised, elegant brand with tonal embellishments. At present, the brand concentrates only on men's wear and immediately has no plans to introduce women's wear range.

Revealing the detailed retail plan for Ethnix, Bhanjdeo said, "Ethnix products will be available at The Raymond Shop franchise stores, MBOs,

“THERE ARE A LOT OF BRANDS IN THE SIMILAR SEGMENT, BUT WE HAVE AN EDGE OVER THESE BRANDS AS OUR DISTRIBUTION NETWORK IS FAIRLY STRONG, OUR FRANCHISE OUTLETS ARE SPREAD ACROSS INDIA. AND AS COMPARED TO OTHER BRANDS WE ARE OFFERING SUPERIOR QUALITY AND ASPIRATIONAL DESIGNS AT A COMPARATIVELY LOWER PRICE RANGE.”

large format stores like Shoppers Stop and exclusive brand outlets for Ethnix."

The Ethnix store, which will span across 800-1,200 sq.ft., will be coming up in Hyderabad, Nasik, Nagpur, Mumbai, Delhi and also in parts of UP by the end of coming fiscal year-end.

Apart from this, Ethnix is also available at Myntra, Jabong and Flipkart.

To do a launch campaign which includes print media and hoardings, the brand is planning to spend anywhere between ₹4-6 crore.

Next Look

Next Look will be available on Myntra, Raymond online store, Raymond franchise stores, MBO's like Pothys and Sarvanas and Reliance Trends stores.

"We are really not thinking of opening exclusive stores of Next Look right now as

brand plays in the economy segment which is at bottom of the pyramid," revealed Bhanjdeo.

The products range of Next Look has been nominally priced. The cost of shirt ranges from ₹800-1,400 and trousers start from ₹1,100.

The brand is targeting youth who have just started working and need to dress well at work. The brand plans to have a strong presence in Tier II, III and IV cities.

According to Bhanjdeo, "There are a lot of brands in the similar segment, but we have an edge over these brands as our distribution network is fairly strong, our franchise outlets are spread across India. And as compared to other brands we are offering superior quality and aspirational designs at a comparatively lower price range."

He further added, "For

marketing and promotion of the brand, we are completely focusing on doing in-store visual merchandising and we will soon start a localised print campaign.”

Raymond Khadi

As *khadi* is a difficult fabric to work with, Raymond Khadi will be applying techniques and processes to make it wearable and desirable – be it in the terms of look and feel of the fabric, prints that the brand will be introducing or the cuts and the silhouettes that the brand will be doing.

“We are trying to adopt a few clusters and work



with them and tell them the techniques which will improve the quality



of the output and then captively buy-out their entire production. So, over a long period of time, we see ourselves working in tandem with these clusters and this way we will be supporting a lot local *karigars*, weavers,” revealed Bhanjdeo.

He further added, “If we do not make this brand aspirational or design-wise acceptable to today’s young consumer, we will not see final through-puts of the product, So therefore, we buy from them, we apply our own techniques and processes to these fabrics to make them wearable, shrink-free and to make them more attractive.”

Raymond Khadi has an expansive range of products like trousers, short *kurtas*, long *kurtas*, *bandhgallas*, shirts and a lot more. The

price range of the products ranges between ₹3,000-14,000.

Apart from EBOs of Raymond, the brand will be available at Raymond franchise outlets, MBOs and exclusive brand outlet of Raymond Khadi.

“First EBO of Raymond Khadi, which will be a boutique store spanning around 600-800 sq.ft., will open at Klaghoda, Mumbai. Apart from this we are also planning to open exclusive brand outlets at Delhi and Bengaluru,” said Bhanjdeo.

“All these brands are expected to contribute ₹100-150 crore to Raymond’s revenue next year and going forward Ethnix and Next Look has the potential to reach ₹500 crore each,” concluded Bhanjdeo. **IR**

FORM IV
(See Rule 8)

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I, SP Taneja, hereby declare that the particulars given above are true to the best of my knowledge and belief.

Dated: 1st March, 2018

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DYSON LAUNCHES DEMO STORE AT DLF PROMENADE

Dyson has brought its latest problem solving technology to India, including its cord-free vacuum cleaners (Dyson V7 & V8 range), revolutionary hairdryer (Dyson Supersonic) and its range in intelligent air purifiers (Dyson Pure Cool Link)

Dyson, the global technology company and developer of high-performance machines has announced the launch of its latest products in India. It also officially opened doors to India's first Dyson Demo store in DLF Promenade Mall, New Delhi.

Dyson will invest more than ₹1200 crore in India over the next five years, having received its license for Single Brand Retail Trade in 2017 through the 100 percent FDI route. Founded by British



inventor and entrepreneur, Sir James Dyson OM, Dyson has brought its latest problem solving technology to India, including its cord-free vacuum cleaners (Dyson V7 & V8 range), revolutionary hair dryer (Dyson Supersonic) and its range in intelligent air purifiers (Dyson Pure Cool Link).

Speaking at the launch event, Jake Dyson, Chief Engineer & Member of the Dyson Board said, "We are pleased to bring out the latest technology

to India. Dyson engineers have spent time undertaking research in home across India to understand how range of products, using our patented technology, which we believe will bring meaningful benefits."

Describing Dyson's problem solving approach to developing technology, he added, "Dyson engineers always start with science and technology. We harness this to improve products, make them exciting and pleasurable to use. We encourage our engineers to have a fearless approach to experiment and failure in order to make discoveries and develop products with levels of performance that no one has experienced before."

The Dyson Demo Experience

The first company-owned Dyson Demo store has opened at DLF Promenade Mall in Vasant Kunj, New Delhi will quickly expand opening a total of 20 stores in the country. Dyson puts its technology, products and customers at the core of its business. The Dyson Demo stores are designed to encourage people to pick up, test and understand



Dyson technology, interactive demonstration bring the science at the heart of its machines to life.

Dyson experts are available to explain products and provide recommendations to best suit customers' lifestyles. An in-store salon offers complimentary styling appointments with the Dyson Supersonic hair dryer.

In addition, Dyson will make its machine available through its new Dyson India website www.dyson.in and has partnered with amazon India. With its online channels, Dyson will initially over Delhi, Mumbai and Bengaluru and will expand to other metros across the country over the course of the year.

In a global first for Dyson, it is launching concierge in-home services in India, which will offer customers the complete experience of Dyson's revolutionary products in the convenience and comfort of their homes. The service will begin in Delhi and Gurugram and expand to the complete Delhi NCR region, Mumbai and Bengaluru this year.

Brand History

Dyson was founded in 1993 by Sir James Dyson, who remains at the helm of the company. From its beginnings in cyclonic

vacuum, Dyson's portfolio has grown to include battery enabled and autonomous vacuum cleaners, hair dryer, lighting heating and cooling fans, humidifier, air purifier and hand dryers, which are exported from the UK and sold in 83 markets globally. Dyson holds 7,500 patents worldwide and is focused on combining hardware, software and algorithms to make intelligent machines which understand their environment and how to improve it.

"We solve the problems other ignore. We engineer better technology and then explain why ours is better. The impossible spurs us on," stated Sir James. Headquartered in Malmesbury, UK, Dyson is a family business employing 10,000 people globally. One third of its people are engineers and scientists. Dyson has 40 live university developing early stage technologies, including a joint robotics lab with Imperial college London, and a Chair of Fluid Mechanics at University of Cambridge. Dyson has pledged € 2.5 billion to the development of a battery electric vehicle which it will reveal in 2020.

The US and Japan are Dyson's largest markets and Asia is the fastest growing region, Dyson is one of the fastest growing technology companies in Europe. [R](#)





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‘Lacoste is a Bridge-to-Luxury Brand, for People Aspiring Towards Well-Appointed Lifestyles’

The bridge-to-luxury brand – known for its strict clean-cut design codes and aesthetic – continues to work towards creating a luxurious shopping environment, allowing the quality of product and design to take centerstage...

– By Surabhi Khosla

French bridge-to-luxury, lifestyle brand, Lacoste, popular for its polo T-shirts is steadily working its India expansion plans. With premium retail developments coming up at an even pace in India, on an average, Lacoste opens six to eight new stores every year. The brand even launched its highly anticipated online store, www.lacoste.in in the year 2016.

Lacoste – known for its strict clean-cut design codes and aesthetic – continues to work towards creating a luxurious shopping environment, allowing the quality of product and design to take centerstage.

The brand currently has 48 PoS in India, including its website, and is present in 18 cities in the country with its physical stores. Most of its stores are company-owned, but franchise stores have started contributing to a decent percentage of sales in recent times.

In an exclusive interview with IMAGES Retail Bureau, **Rajesh Jain, MD & CEO, Sports and Leisure Apparel Ltd. (Lacoste Licensee in India)** talks about the brand journey in India, the importance of in-store experiences, Lacoste's India Omnichannel strategy and the challenges of the fashion retail industry as a whole.

Excerpts from the chat...

Tell us about any in-store innovative experiences that Lacoste has introduced for its customers?

We believe in innovation from the word go. The first innovation that we do is on our products. Every six months or so, we launch

All You Wanted to Know About RAJESH JAIN

- ▶ Rajesh Jain's signature quote sums up his approach to business leadership succinctly and emphatically. "Top Line, Bottom Line, Growth, Customer Delight and Human Resource Development. Everything else is merely incidental."
- ▶ His clearly stated mission – growth as opposed to category leadership – has shaped Lacoste India into a lifestyle brand, with a remarkable growth of 100 percent in the last few years, despite a global economic slowdown.
- ▶ Since being appointed MD and CEO in 2009, Jain believes his biggest achievement has been able to put together a great team of committed colleagues to drive the brand's growth.
- ▶ He believes there is no single approach to retailing success; retailers must be prepared to constantly monitor macro and micro elements of the business.
- ▶ A Masters in Commerce from the University of Delhi and a Chartered Accountant from the Institute of Chartered Accountants of India, Jain obtained his Company Secretary degree from the Institute of Company Secretaries of India.

new products to keep the store looking fresh. Apart from that, as far as technology is concerned, it's certainly the way forward, the demand of today's times. We have started a CRM platform which is technology driven. Secondly, we have started using ERPs and PoS systems which are also technology driven. Here, we are also working towards innovation like how to map inventories to try and give our customers the best Omnichannel experience.

How do you as a brand work towards shortening the supply chain in as far as the customer goes?

Our supply chain works wonderfully. We have two methods for supply chain. One is when we launch new products, they are carefully allocated to every PoS that we have. The second supply chain is when we do auto-replenishments – there is

minimal human intervention here. The moment a product is sold, an automatic trigger is sent to the 'Mother warehouse' that this product needs to be replenished in this particular store. The product goes through our logistics partner and reaches that particular store within a day in Delhi-NCR and within 3-5 days beyond the capital city.

Since you're a bridge-to-luxury, lifestyle clothing brand, what's your pricing strategy in India?

Lacoste is an accessible luxury brand. By definition we are then accessible in areas where we determine we have a target audience. Our pricing strategy is in sync with the fact that we are a bridge-to-luxury brand and are meant for people who aspire towards living comfortable and well-appointed lifestyles.

Due to this strategy, Lacoste naturally gets most of its

customers from Metros and Tier I cities. On the other hand, our online business is booming in Tier II cities as well for those customers who don't have access to the products offline. As far as Tier II cities are concerned, we plan to explore them through our online channel instead of physically going there. Again, the reason is premium retail development which is currently not present in Tier II cities in an offline model. We reach out to those customers through our e-commerce website and it has proved to be very effective because we get a lot of online consumers.

How do you face competition from brands like Zara and H&M who have come into India with



their smart casuals and low prices?

The consumer today is an aspirational consumer. They want good quality products, the promise of a brand. I'm very happy to say that once they experience Lacoste products, a large percentage of them stay with us. We are fortunate to have a large base of repeat customers – they understand the brand and appreciate it..

Also, 90 percent of our customers are registered for Club Lacoste, the CRM program that we run and out of this 90 percent, 50 percent make repeat purchases in our stores. This tells us that our customers love our products. We of course love our customers.

Do you have a specific location strategy? Do you prefer malls or high streets?

Whether we go in for a high street or a mall, our locations are chosen very carefully. It has to be a premium environment, even our adjacencies have to be premium. At the same time, we also look at the customer profile in that territory, so that we don't keep on opening

too many doors. We are very selective.

Now, coming to differentiation between malls and high streets – in India, the weather conditions are not very conducive to relaxed shopping, so we have started opening most stores in malls, keeping consumer comfort in mind. Another reason for opening stores in premium malls is that we are already present in almost all high

RAJESH JAIN'S TOP THREE CEOS

My three favourite CEOs in the Global Retail Industry are:



● **THIERRY GUIBERT, LACOSTE'S GLOBAL CEO** – He can keep the team together, and he's extremely innovative in his thinking.



● **KISHORE BIYANI, CEO FUTURE GROUP** – He really thinks ahead of his time, he's futuristic in his approach.



● **LATE STEVE JOBS, FORMER CEO, APPLE** – His ideas and principles were so clear. He understood that his work was to run a business and not win some popularity contest.



streets which are in tune with our brand profile.

What are the challenges – as per you – that the Indian fashion retail industry is facing today?

One of the biggest challenges that we are facing in fashion retail has remained the same for the last decade or so. It is the non-availability of premium retail development at the right cost. The costing – per square meter occupation cost – in India is as high as in any other part of the world, then be it Paris, USA, China. However, the throughput is not the same. This is a big challenge for the fashion retailer.

The second big challenge – which mostly cropped up in the last three years or so – is discounting by online players. This percolated down to traditional retailers who then had to come up with similar discounts to combat the e-commerce threat. This impacts retailers who do not compromise on the quality and positioning of the brand. We hope this will stabilize in the near future, because at the end of the day, heavy discounts don't make great business for anybody. In my view,



it is customer delight that matters. We have to win customers through exceptional service and products and not through discounting.

What is your Omnichannel strategy? What are you doing to woo Millennials?

Omnichannel is a fascinating word, a very nice word – something we would love to do, but honestly speaking, I am yet to come across a good brand which has actually, successfully implemented it in the country. It's in very nascent stages. If I de-mystify Omnichannel, it very simply means mapping all your inventories – then be it in the warehouse or in any store across the country. Wherever the customer chooses to shop, online or offline, he should be

exposed to the entire inventory that a brand has on offer.

Earlier, it was a very common phenomenon that a customer would like a product but not get his size, or colour preference. With Omnichannel, the ability to service a customer – give him doorstep service – from anywhere in the country becomes very easy. We would love to implement Omnichannel as soon as possible and we are working towards it. There are lots of things in the pipeline in as far as Lacoste goes. Let's see how things pan out.

What are Lacoste India's expansion plans?

Our strategy is to open six to eight new points of sale every year and we're well on target every year. **IR**

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FAST FASHION BRAND **COVER STORY** ALL SET TO INTRODUCE A WORKWEAR SEGMENT

– By Charu Lamba

The brand's growth aspirations are simple enough – to become the go-to brand in the western wear category for women and also the first Indian-born brand to be part of the fast fashion consumer consideration set...

In 2016, Kishore Biyani led Future Retail – as progressive a group as they come – decided to launch a fast fashion brand to take on the likes of international brands Zara and H&M. In April of that year, Cover Story was born.

When the Future Group does nothing, it's never halfway house. The company then proceeded to set up a design house based out of London to develop cutting edge fast fashion. This design house was dubbed Future Style Lab, a wholly-owned subsidiary of Future Group, which developed and procured styles for Cover Story. The brand refreshes 10 percent of its collection every week by adding new pieces. It then phases out 10 percent of the older collection to even out the stock.

Cover Story, which aims to set the pace for India's fast-fashion business through integrating global fashion design with smart and efficient sourcing, is fast becoming the go-to dress-buying destination for Indian women. The brand has EBOs in all the major malls of the country, and its outlets are designed to recreate an 'intimate boutique' and provide a comfortable shopping experience. The layout is layers of transparency with opacity, which encourages a sense of discovery while shopping.

IMAGES Retail Bureau spoke exclusively with **Manjula Tiwari, CEO, Future Style Lab**, who gave us the complete scoop on brand's plans for the future...



Tell us about the brand Cover Story. What's your journey been like? What is your USP?

Cover Story is a fast fashion brand that designs and delivers the latest global trends to style-conscious Indian women, at affordable price. Our design studio in London - Future Style Lab - curates and creates fits, cuts and colors that flatter the Indian body.

The journey has been phenomenal. It started with a chance conversation backed with support from Future Group, and a single-minded vision to provide best fashion

How has been the response to the brand so far?

We are seeing some serious love for the brand evolve over the last 10 months. Consumers have been overheard to praise the collection at Cover Story and they acknowledge that the brand is truly fashionable, in the sense, 'if you like something, better get it now because it won't be here next week'. Many consumers consider us as their go to dress brand and often come to us because they know they will find something fresh and suitable for them here.

COVER STORY IS A FAST FASHION BRAND THAT DESIGNS AND DELIVERS THE LATEST GLOBAL TRENDS TO STYLE-CONSCIOUS INDIAN WOMEN, AT AFFORDABLE PRICES. OUR DESIGN STUDIO IN LONDON - FUTURE STYLE LAB - CURATES AND CREATES FITS, CUTS AND COLORS THAT FLATTER THE INDIAN BODY.

about the Future Style Lab setup in UK?

In order to ensure we have the right pulse on the international runway trends, we were clear that we needed a design house based out of London. Our design team comes with great experience in the fast fashion space and being close to all the runway action, we ensure to catch the latest trends in time.

What is your pricing strategy?

Best trends in quality fashion at affordable prices (competitive and more attractive than other brands).

How many SKUs/ product categories do you offer under your brand? Which are the typically faster moving categories and why, in your opinion?

We at Cover Story offer a complete wardrobe solution for every fashionable woman. Our offerings include something for everyone with multiple options across casual wear, work wear, occasion wear and outerwear etc. Typically, in a season, we introduce 400-500 SKU's spread across different categories. We make sure that we have fresh designs in our stores every week and that is why each customer would have reasons to come back to us and never leave disappointed.

Our dresses are the fastest moving category - most popular with consumers. Our dresses have clicked well with the Indian audience given the cuts, shapes and price points.

As a category, it is fast growing with the target audience and at Cover Story the options provided within this category carry the touch of femininity they are looking for.



to Indian women but in a way that works for them. In a short span of 18 months we have seen the brand become a hot favourite of the modern Indian women. What stands out for them, are the feminine cuts that flatter them, the great prices, and gorgeous color palettes which other fast fashion brands lack.

The brand was introduced to take on Zara and H&M in India. How far have you succeeded in that?

We are different to these other fast fashion brands. Our objective is to provide consumers in India international fashion but adapted to suit their body type far better than the other

players. We are on the right path - to provide consumers with a breath of fresh air, we have a certain take on runway fashion and it is this feminine touch which sets us apart from these other brands.

To launch a fast fashion collection requires a lot of design sensibilities. Tell us

Any category expansion plans?

As we move towards opening larger format stores, we will be expanding the categories we feature, including work wear amongst others. The vision is to become a whole wardrobe solution for the Indian woman in the western category.

Elaborate upon the Omnichannel strategy of the brand.

Cover Story is on track to become a commercial brand – this of course means its accessibility across the nation is key. When the brand launched, the objective was to blanket the market and ensure that it is accessible to the wider audience via all channels, EBOs, MBOs and online. As the brand evolves, there will be more focus on opening larger format EBOs, but with the backing of Central that has a wide footprint, and not to forget an online presence in the ever-growing e-commerce market.

What's your marketing/promotion strategy? Please give specific details. What is lined up for the future?

We believe the future of consumer engagement is to get personal – create a connect with the consumer through great experiences. We intend to bring our customers a connect to our London designers with regular events and interaction, and to create constant content around international fashion and style to establish Cover Story as a go to fashion authority for the our consumer.

Tell us about the tech innovations that you have introduced at your stores.

We have long been



“ HAVING A LARGE PRESENCE ONLINE VIA OUR OWN PLATFORM AND OTHER MARKET PLACES, WE WILL ENSURE REACH TO ALL CITIES IN THE COUNTRY. WE CURRENTLY HAVE NO PLANS TO OPEN ABROAD BUT ARE ALWAYS EXPLORING THE OPPORTUNITIES THAT COME OUR WAY – SO MAYBE ONE DAY.”

incorporating digital into our stores by providing consumers a way to experience fashion one step further. The ‘Elo Screens’ in store allow users to browse the season lookbook and current catalogues on ideas on how to style each piece in the store. Furthermore, now with our own e-commerce portal live, we allow users to book their outfits from our website in case their sizes are not available in store.

What is the turnover that you are estimating this year?

Our turnover is better than industry standards for an 18-month old brand – however, exact numbers are discretionary.

What are your growth aspirations in the next two-three years?

Our growth aspirations are simple enough – to become the go-to brand in the western wear category for women and become the first Indian-born brand to be part of the fast fashion consumer consideration set.

Tell us about the retail planning for Cover Story? How many exclusive stores do you currently and how many more have you planned and of what size?

Cover Story currently has 16 EBOs and plans to grow to a strength of 24 in the next financial year. The aim is to open larger format stores, nothing less than 1,500 sq. ft. in this new line up, to truly showcase a better range of

categories for the discerning customer. Our latest opening at Ambience Mall, Gurugram is our flagship store at 2,000 sq.ft. and we have many more planned.

Throw some light on your expansion plans. Any plans to explore new cities or to test international waters?

With new store openings lined up, we intend to have a footprint across all metros and Tier I cities. Having a large presence online via our own platform and other market places, we will ensure reach to all cities in the country. We currently have no plans to open abroad but are always exploring the opportunities that come our way – so maybe one day. Right now, the focus is at home.

How has been growth of standalone stores in the current year?

Standalone stores at some of the best malls across the country has given the brand its identity as a truly international shopping experiential fast fashion brand. 

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The Inside Story:

WHAT MAKES **FASHION RETAIL** THE MOST PROFITABLE SEGMENT FOR MALLS



The Indian fashion retail market is currently worth ₹2,97,091 crore and is envisaged to grow at a promising CAGR of 9.7 percent to reach ₹7,48,398 crore by 2026. The depth and variety of fashion brands have taken a quantum leap in shopping malls across all the sub-categories including apparel, footwear bags and accessories...

— By IMAGES Retail Bureau

Fashion plays an important role not only individually but also in society. It allows us to define our own style and personality, outlines us as individuals and opens doors of acceptance in modern society.

With the rising importance of fashion in the Indian scenario, it is no surprise then that the Indian fashion retail industry is on a meteoric growth trajectory. Indian designers are taking the global industry by storm, peddling unparalleled designs – for both apparel and accessories – in the international market. The glamour quotient is at an all-time high with the Millennial population emulating models and film stars.

This Millennial consumer – with his/her high-income level, even higher spending capacity and his shop-anytime-you-wish attitude – wants the best of fashion. The consumer is ready to explore and happy to spend and the retail industry is eager to comply. The fashion retail sector is catering to the evolving consumer through a number of mediums, including physical and digital, while striving to provide that all important Omnichannel engagement.

New Global Ranking

Recently, India surpassed China as the top retail destination in the world. The change in ranking is an outcome of four factors including increased consumer spending beyond essentials, mobile and internet penetration, favourable foreign investment climate and cashless transactions.



“Organised retailing in India has undergone remarkable growth in last decade owing to favourable demographics, growing consumer aspirations and brand consciousness.”

– **Pankaj Renjhen**,
Managing Director - Retail Services, JLL India

Favourable trade policies, GST to a certain extent, and the increased penetration of organised retail into the interiors of the country are among other factors contributing towards making the Indian fashion retail industry attractive for investors.

Pankaj Renjhen, Managing Director - Retail Services, JLL India, writes, “Organised retailing in India has undergone remarkable growth in last decade owing to favourable demographics, growing consumer aspirations and brand consciousness. Correspondingly, the fashion category has also undergone profound transformation over the years in terms of type and positioning of brands, formats, products and emergence of new players. The depth and variety of fashion brands have taken a quantum leap in shopping malls across all the sub-categories including apparel, footwear bags



“Leading fashion brands are eyeing the Indian market with renewed, country-specific, localised strategies. Indian consumers are exhibiting higher preference towards International fashion brands.”

– **Abhishek Bansal**,
Exe. Director, Pacific India

and accessories. Fashion retailers not only expanded in metros but have also moved into Tier II and III cities as organised retail spaces started mushrooming up in smaller towns.”

He further goes on to explain that across Indian shopping malls, there has been a significant rise in the number of retailers in the premium and high-end fashion segments over the last decade. It has become more important than ever before for retailers to understand the need for customisation across different micro-markets.

Market Size & Growth

The Indian economy, one of the fastest growing economies of the world, is witnessing major shifts in consumer preferences. An increase in disposable incomes, brand awareness and a tech-savvy Millennial population are the driving factors of incorporated retail within the country. The entry of

international brands, changes in preferences to branded products, the budding economy, and a large young consuming population has made India a highly lucrative market.

India has the world’s largest youth population, which is becoming fashion conscious owing to mass media and social media penetration. This has opened unprecedented retail market opportunities.

Overall, Indian retail scenario has shown sustainable long-term growth compared to other developing economies. The Indian retail market was worth ₹41,66,500 crore in 2016 and is expected to reach ₹1,02,50,500 crore by 2026, growing at a CAGR of 10 percent. It is envisaged that the current fashion retail market worth ₹2,97,091 crore will grow at a promising CAGR of 9.7 percent to reach ₹7,48,398 crore by 2026. Indian apparel industry which is the second largest contributor in the retail industry after food and grocery is also witnessing major shifts. The promising growth rate of 9.7 percent makes the Indian fashion industry prominent in the retail sector. With a GDP growth rate of 7 percent, India has an edge over developed markets of the US, Europe and Japan which are expected to grow at a rate of 2-3 percent.

Abhishek Bansal, Executive Director, Pacific Mall

explains the growth of the fashion retail market, “Leading fashion brands are eyeing the Indian market with renewed, country-specific, localised strategies. Indian consumers are exhibiting a distinctively higher preference towards International fashion brands. There seems to be an ever increasing and

growing appetite for all things fashionable. Delhi has become a growing aspirational market for international luxury and fashion brands. We are continuously seeing the more far-sighted and committed brands consolidating their position in the market by continuing to look at expansion strategies. Despite this, the Indian market has a lot of untapped potential. As the integration of the Indian consumer with global trends continues, international fashion brands can expect to find the country an increasingly fruitful ground for growth. We have observed that there has been a significant rise in the number of retailers in the premium and high-end fashion segments over the last decade. Within the fashion segment, there are also variations in type and positioning of brands across various malls depending upon the location and catchment. In other words, the real estate strategies of fashion retailers are customised according to micro-markets, taking into account the shopping preferences of the potential shoppers.

Other factors – according to a JLL report – that are ensuring a boom in the Fashion Retail segment in India are an increase in the number of brands in the premium fashion category, the entry of global brands and fast fashion retailers, and the subsequent growing demand for quality Grade A retail real estate space. This has further led to an emergence of fast fashion retailers as anchors in malls, the introduction of new formats and the adoption of technology by fashion retailers, customisation of retailers’ real estate

strategies for different micro markets, increasing competition necessitating regular evaluation of brands’ performances by shopping malls and a regular churn in prime shopping malls to accommodate newer global and high performing brands

Growing Prominence of Western Wear & Fusion Wear

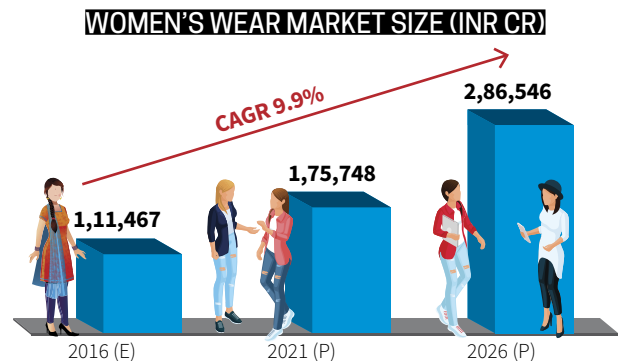
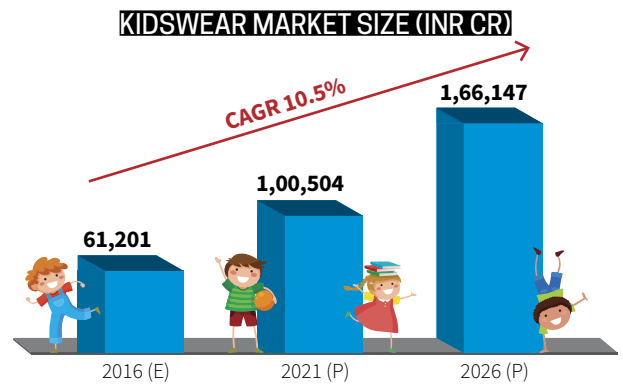
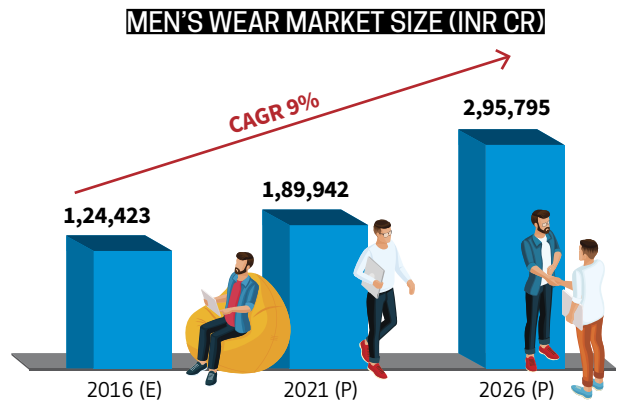
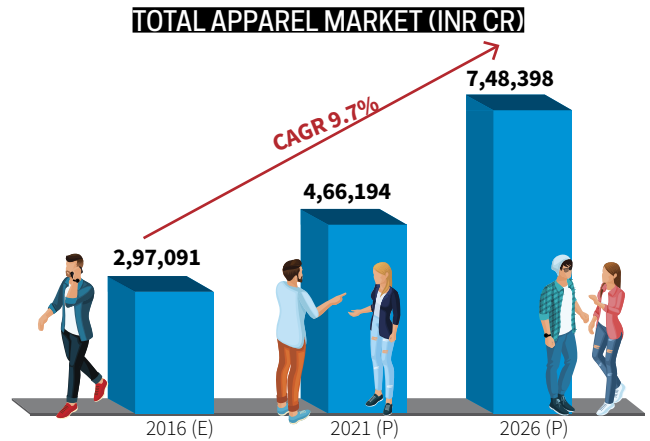
The Indian apparel market is classified into three segments; men, women and kids wear. Currently, men’s wear holds major share with approximately 41 percent of the hold of the total market. Womenswear contributes around 38 percent, while 21 percent is covered up by the kids wear.

Going by the demand and the surge, it is estimated that over the next decade womenswear and kids wear will demonstrate high CAGR of 9.9 and 10.5 percent respectively, resulting in rise in market share of these categories. Both, menswear, and womenswear are expected to contribute 39 percent each to the total market by 2026, with kids wear accounting for the remaining 22 percent.

With a market size of ₹1,24,423 crore, menswear is the largest segment in the apparel market and is expected to grow at a CAGR of 9 percent for the next 10 years to reach ₹2,95,795 crore by 2026.

The kidswear segment – one of the fastest growing segments in the Indian apparel market – is expected to reach ₹1,66,147 crore by 2026.

The womenswear market is expected to reach ₹2,86,456 crore by 2026. Womenswear in India comprises of ethnic wear, western wear, Indo-



Source: Technopak Analysis

western, inner-wear, etc. Currently, ethnic wear is the single biggest category in womenswear segment with a share of 66 percent. However, the increase in the number of working women in India has fueled the women's western, fusion, and occasion wear segments as well.

Malls are increasingly allotting more and more space to women ethnic and fusion wear brands which are expanding aggressively across the country. Western wear brands, including fast fashion and casual wear, are also expanding rapidly due to increasing demand by consumers.

"In the last decade, there has been a manifold increase in the number of malls, but the quality retail real estate space is still quite limited. Demand for right quality retail spaces



“With 224 operational stores, it comes with everything that is required to whet the desire of a discerning shopper, from premium to mid-premium, branded apparels to fashion accessories and much more.”

– **Shibu Philips**, Business Head, Lulu Mall



“Fashion is a very important segment for us. We have recently added new brands like Columbia, W, Asics, Croma, Cadini and Beligan Waffle. This is an ongoing process and brands are regularly added to make sure the mall stays fresh.”

– **Mukesh Kumar**, Senior VP, Infiniti Malls



“Fashion plays a very important role when it comes to the mall business. Our primary target audience is the fashion and brand conscious consumers who are well versed with the latest fashion trends in the market.”

– **Gajendra Singh Rathore**, Director, Phoenix MarketCity

in the right locations has increased significantly in recent times. Currently, the fashion category occupies 45-60 percent of mall spaces in India. The past few years have seen the emergence of

national-level women ethnic and fusion wear brands which are expanding aggressively across the country. Western wear brands, including fast fashion and casual wear, are also expanding rapidly due to increasing demand by consumers,” said Bansal.

Shibu Philips, Business Head, Lulu Mall, agrees “With 224 operational stores, it comes with everything that is required to whet the desire of a discerning shopper, from premium to mid-premium, branded apparels to fashion accessories and much more. We also, understand that the expectations are growing day by day, as customers and new generations are exploring the world. And so, we have been adding more International fashion to the mall. Since the opening of our mall in 2013, we knew fashion will be the most challenging segment for us. Therefore, being the first avenue for large scale organised retail in Kerala,

we provide a complete shopping and entertainment destination value, we have been able to stay far ahead of competition across the state.

Gajendra Singh Rathore, Director, Phoenix MarketCity said “Fashion plays a very important role when it comes to the mall business. Our primary target audience is the fashion and brand conscious consumers who are well versed with the latest fashion trends in the market. We bring the best mix of the international, national and regional fashion brands to cater to their needs.

Mukesh Kumar, Senior VP, Infiniti Malls added, “Fashion is a very important segment for us. We have recently added new brands like Columbia, W, Asics, Croma, Cadini and Beligan Waffle to name a few. This is an ongoing process and brands are regularly added to make sure the mall stays fresh.”



Changing Consumer Landscape in India

Indian consumers are changing at a pace far greater than that foreseen. This change has been a result of several drivers that have grown in strength over the years. The drivers are as follows:

Change in consumer income and Demographic Profile:

As per latest census figures, one third of the Indian population are below 25 years and half of the population is below the age of 35 years. This means that consumer demand will keep growing in the future, thereby propelling India's GDP via internal consumption, it also means that the types of products, services and experiences will undergo a big change to keep pace with the outlook of this young population. Rising incomes and propensity to spend are now expanding beyond metros to Tier II and III cities, which are also turning into new power centres of demand.

Technology Innovations:

The importance of technology in disrupting established business models is being widely recognized in the Indian retail industry. From mobility, 3D printing, and

IoT, to Artificial Intelligence and even machine merchandising, technology is causing major changes in product creation, delivery and service to the consumer.

Cultural Shift: Changes in the amount and types of leisure activities have resulted in a shift from a formal dressing code to a more casual and stylish one.

Social Media and Brand Endorsement:

The Internet and broadcast media have contributed immensely in building consumer awareness about brands. The reach of the media and television has ensured that consumers are following fashion trends at roughly the same pace all over the country. Increased awareness, coupled with geographical expansion and the growing reach of online retailers, has led to an increase in demand beyond Tier I cities.

"Customers now do not buy clothes but invest in occasions. Formal, non-formal, evening wear, day wear, casuals etc. are all becoming part of the larger fashion statement. The world has become very connected, as what happens in New York or London flashes in seconds on our smartphones. The

demands and desires that are being created are ever growing. The consumer is a global citizen and his desire for the latest fashion and finest brands available in the world is ever evolving. In this scenario, it is extremely important to dedicate a substantial amount of area to fashion, which thereby drives revenues for the mall," emphasised **Sanjeev Mehra, Vice President, Quest Properties India Ltd.**

Changing Dynamics of Fashion Retail Spaces

Retail in India is an incredible assortment of formats. Over the last decade, the concept of shopping has undergone a sea change in terms of format and consumer-buying behaviour. Along with increase in disposable income, brand consciousness, development and modernisation of infrastructure has also played a major role in defining the changing dynamics of retail spaces in fashion category.

"Indian fashion brands are constantly reinventing themselves to evolve with the increasingly competitive retail landscape. There is now an increasing emphasis on productivity when it comes to the revenue generated per square foot in physical stores.



“The world has become very connected, as what happens in New York or London flashes in seconds on our smartphones. The demands and desires that are being created are ever growing. The consumer is a global citizen and his desire for the latest fashion and finest brands available in the world is ever evolving.”

– **Sanjeev Mehra,**
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“Viviana Mall has zoned itself in such a way that a customer knows exactly where he/she will find a particular category of product in the mall. With the help of technology, we have provided digital touch screens at all entry points and on all floors so that a customer can easily locate each and every brand in the mall without any assistance.”

– Rima Pradhan, Sr. Vice President, Marketing, Viviana Mall

Therefore, fashion brands are reviewing their store networks and undertaking conducting structured research when it comes to location, rentals and sales generation,” explains Bansal.

There is ample dynamism at present, with a number of international brands entering the market. The existing brands are also working towards reinventing their ways to keep up with the pace of growth in the sector. Currently, the total retail spending in the top seven retail markets of the country amounts to ₹4,17,200 crore and this is projected to reach ₹8,76,200 crore by 2020.

But on the downside, the penetration of organised retail in India is abysmally low

compared to developed and emerging economies. While the share of modern retail is 84 percent, 71 percent, and 53 percent in the US, Singapore and Malaysia, respectively, it is only 19 percent of the value of the total retail spending in the National Capital Region, Mumbai, Chennai, Bengaluru, Pune and Hyderabad cumulatively.

The next big wave that changed the skyline of the retail sector in India and accelerated the presence of modern retail is e-tailing, or the sale of products and services through the internet, telephone and television. The trend started in 2010 and has become prominent in the last four years. The latest retail wave that has brought about a change in the retail landscape is the Omnichannel approach. This approach delineates the integration of experiencing the convenience of e-tail and brick-and-mortar to give a seamless experience to the customers.

Omnichannel connects with consumers through various channels, such as physical stores, websites, mobile apps, social media, kiosks and many more, and strives to enable the

consumer to shift between various media seamlessly during a consumer shopping journey.

Rima Pradhan, Sr. Vice President, Marketing, Viviana Mall highlighted the benefits of Omnichannel and technology, “Viviana Mall has zoned itself in such a way that a customer knows exactly where he/she will find a particular category of product in the mall. With the help of technology, we have provided digital touch screens at all entry points and on all floors so that a customer can easily locate each and every brand in the mall without any assistance.”

Changing Trends

As far as fashion and shopping industry is concerned; the word ‘trending’ is very difficult to explain and understand.



It’s all about understanding and reshaping the consumer demand in innumerable ways. What style, color and size should be bought, what are the brands that needs to be explored while purchasing, what design is new and trending in the market are the major queries which the customers and retailers have to undergo before understanding the market. Some specific trends are as follows:

Sustainable and eco-friendly manufacturing:

As India is confronted with pollution issues, it has become imperative for textiles industries to adopt



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“Lots of brand are coming from abroad, out of which many are being run by Indian corporates. Lots of positive steps are being taken by the government to make the process easier for these foreign brands to enter India and establish themselves.”

– **Arjun Gehlot**, Director, Ambience Mall – Gurugram & Vasant Kunj



“At our malls we have a wide number of both international and national brands and both the categories are doing well catering to extremely conscious consumer of today following major fashion trends.”

– **Pushpa Bector**, Executive Vice President and Business Head, DLF Shopping Malls

eco-friendly strategies. Consumers are sensitive and are increasingly aware and brands/private labels in turn have started catering to this market especially in babies, kids wear and premium adult wear categories segments.

Smart Garments: With technological penetration everywhere, the garment industry is also witnessing major technology upgradation. Smart garments are the norm of the day.

Smart Casuals: Corporate dressing these days is not just restricted to strict formal wear anymore. Increasing inclusion of smart casuals or semi-formals has resulted in the entire corporate attire segment undergoing a sea of transition.

“On the semi-urban and small town side, this means more spend on apparel, increasing adoption of

ready-to-wear apparel and increasing acceptance of western casuals. On the urban side, with the rapid expansion of professional sectors in India where working conditions are more women friendly and hiring policy is inclined towards greater gender diversity, the number of women entering in workforce is constantly increasing. Hence, the need of dressing smart and willingness to look better is driving urban women to increasingly accept western wear. Urban consumers today buy apparel which serves a specific occasion. There exist urban consumers who buy apparel because of functional benefits and hence brands introduced clothing lines on the concept of shape retention, anti-stain, anti-odour, anti-perspiration, quick dry, etc. Urban consumers see apparel as a form of self-expression,” said Bansal.

Apparel Sales in E-Commerce:

E-commerce has grown in recent years and is playing a major impact in bridging the gap between consumers in Tier I, II and III and premium wear sellers. In India, e-commerce portals and marketplaces have established themselves by providing huge discounts to lure customers thus changing the consumers’ mindset and providing wider range of products to choose from.

popularity of ready-made clothing among young and working Indian men. “But now, the trend of custom-fit clothing in India is reviving. Custom-fit clothing is of two types – made-to-measure and bespoke tailoring. In India, premium brands like Raymond and Louis Philippe as well as luxury brands like Armani, Versace, Zegna, Cadini and Canali offer made-to measure services. Premium brands like Van



Rise of Organised Retail:

The Indian fashion retail industry is transforming rapidly and is seeing shift from unorganised to organised retail. Penetration of organised retail chains has contributed to the growth of the apparel market and expansion to non-metros is being seen as a very lucrative opportunity by domestic and international brands. Once considered value conscious, consumers of Tier II cities are now open to spending more on fashion.

Return of Custom-Fit Clothing:

The menswear market in India transitioned from tailor-made to ready-made clothing due to the

Heusen’s My Fit and Creyate by Arvind Group have also introduced bespoke tailoring in an attempt to capture the growing trend of custom-fit clothing,” highlighted Bansal.

Middle Class & their aspirations:

37.5 percent of India’s population is expected to be living in urban areas in search of jobs and better education by 2025. The middle class consumers which will form 48.5 percent of total targetable customer base will contribute about 55-60 percent share of total apparel market size.

“Lots of brand are coming from abroad, out of which many are being run by Indian corporates. Also, a lot of

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positive steps are being taken by the government to make the process easier for these foreign brands to enter the Indian market and establish themselves. I also feel today that Indian brands are giving international brands strong competition, which is good for a healthy market," pointed **Arjun Gehlot, Director, Ambience Mall - Gurugram & Vasant Kunj.**

"Phoenix MarketCity has always been known for keeping up with the latest trends in fashion.

The mall curates various events pertaining to fashion such as fashion shows, launch of spring summer collection and autumn winter collection, styling workshops with renowned stylists from the fashion world, a denim fest and so on. We also setup fashion related décor in the mall to generate curiosity among customers. The main objective is to make shopping a fun experience for customers," says Rathore.

"In the past few decades, we have seen a major shift in the fashion fraternity. Today it is all about self-expression and a statement of individuality. Accessibility of information on global trends has led to easy penetration of brands into Tier I & II markets resulting in a common theme

of fashion across the different regions. Needless to say social media has been instrumental in bringing about this change. The lines are fast blurring and therefore majority of global fashion brands are opening stores across India. As a leading player in the retail industry, DLF has always been a front runner of this fashion revolution in the country by connecting international brands with Indian consumers. At our malls we have a wide number of both international and national brands and both the categories are doing well catering to extremely conscious consumer of today following major fashion trends," explained **Pushpa Bector, Executive Vice President and Business Head, DLF Shopping Malls.**

What Works for Fashion Retail

In terms of fashion, Mumbai, Bangalore and Delhi NCR are at the epicentre of the fashion retail wave. The majority of the global fashion retailers planning to enter the country are considering these three locations in the first phase. **Rajneesh Mahajan, CEO, Inorbit Malls,** says "Fashion as a category is comparably more organized in the retail sector in India, and with

apparel, shoes, bags and accessories it contributes anywhere between 60-65 percent of the monthly sales in a mall. The frequency of fashion shopping is higher. Fashion brands bring fresh merchandise every season and the fast fashion brands have even higher frequency of introducing new designs and trends. Fashion being the biggest space occupier



“The frequency of fashion shopping is higher. Fashion brands bring fresh merchandise every season and the fast fashion brands have even higher frequency of introducing new designs and trends.”

- **Rajneesh Mahajan, CEO, Inorbit Malls**

our centers, approximately 48 percent of our retailers are from the fashion category that includes - unisex fashion, menswear, womenswear, kids wear & footwear.”

Nearly 400 international brands are already present in India, a large number of them in shopping malls. Some of the recent entrants in the Indian market include Ikea, H&M, Gap,



“Fashion forms an integral part of our malls. It is a huge driver of footfalls, and forms a large part of our retailer category. At both our centers, approximately 48 percent of our retailers are from the fashion category.”

- **Bipin Gurnani, CEO Prozone Intu Properties Ltd.**

in malls, at Inorbit, we are continuously curating our offering to bring in best in class for our patrons.”

Bipin Gurnani, CEO Prozone Intu Properties Ltd., agrees “Fashion is emerging as an important and growing category in the Indian retail sector.

Consumers, on an average, are buying apparel eight to ten times a year as compared to a few years ago. Fashion category forms an integral part of our malls. It is a huge driver of footfalls, and therefore, forms a large part of our retailer category. At both

Aéropostale and Massimo Dutti. The advent of these fashion giants has brought aspirational trends to India that caters to all age groups. It is not merely the metros, but today fashion has reached the Tier II & III cities thanks to the internet boom.

It is to be noted that the coming of international brands has only increased competition for the share of the buyers’ wallet with domestic brands reinventing and changing their positioning and formats to attract the buyers.





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Region-Wise Distribution

Demand for various apparel categories varies substantially across the country. The urban market that mainly comprises of metro cities such as Delhi/NCR, Mumbai, Bengaluru, Chennai, etc., are the biggest markets for apparel in India and contribute 23 percent to the Indian apparel market.

Considering the fact that almost 70 percent of the population resides in villages, the major contribution of urban cities to the apparel market indicates the higher purchasing power of the people in urban cities, their frequency of purchases and tendency to purchase premium and quality products.

The rural apparel market in India is still primarily catered by unbranded and unorganised local players. Need based clothing and price sensitivity among people of rural India does not make it a lucrative market for branded players.

“Since international brands have already carved a niche for themselves in Indian metropolitans, they are now focusing their energy on Tier I and Tier II cities, trying to tap the market in these cities to expand their consumer base. The top tier cities will continue to remain dominant locations in terms of apparel market because of the presence of both middle class and affluent consumers. However, two-third of this middle class will dwell in the middle tiers and smaller cities as well as large district towns which are and will continue emerging as increasingly attractive apparel markets. There is an estimated potential growth in smaller cities such as Dehradun, Lucknow, Jaipur, Chandigarh,

Kochi, Patna, Bhubaneswar, Indore and Nagpur among the leading cities that will drive retail growth basis total retail stock, upcoming supply, retailer presence, retailer expansion plans and investments. Tier II and III cities among other are the next retail destinations in the country owing to increasing real estate rentals of tier I and metro cities,” says Bansal.

Fashion Space in Shopping Malls

Smart mall developers study their target audience, see the categories that are growing in their catchment area and then pick and choose the perfect brand mix for their fashion and accessories section – an exercise which is extremely important since malls depend heavily on the revenue and footfalls that fashion brings

to them. Since fashion retail is all about the customers’ preferences, space allotment to brands – value formats, lifestyle, and luxury formats – needs to be in sync with the type of people visiting a mall. It is almost impossible to understand what the customer is exactly looking for. The likeness for design and trend can change any moment.

Fashion consumers, say mall developers, can be broadly divided into two categories – focused buyers and impulse buyers. Focused buyers are those who know exactly what they want, which store houses the product and come to the mall with the purpose and intent of buying that piece of clothing. Impulse buyers on the other hand are those who visit a mall just on a whim and then

end up buying clothes that appeal to them on the spot. Both types of customers are important for retail stores and malls and to satisfy them both, mall developers ensure retailers update their designs and categories almost every month.

“Lulu Mall primarily caters to the premium and mid-premium brands in all categories. Ground floor gives an exposure to international brands which includes watches, beauty, fashion, etc. On the first floor, we have a collection of premium brands in men’s, women’s & unisex fashion. The second floor of the mall has kids fashion, value, accessories and sports brands,” marked Philips.

“The Fashion segment as a whole covers apparel, accessories, footwear and is the largest occupier of space, followed by entertainment, F&B and electronics. At Inorbit, we have allocated around 60-65 percent space for the fashion segment which includes fashion anchors, apparel, footwear and accessories. In the recent past, the allocation for F&B has increased and more space is given to this category, may be taking it up to 15 percent of the mall space,” shared Mahajan.





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“35 percent of the total mall area is occupied by the fashion brands. We have specially divided fashion into various sub categories such as General Fashion, Kid’s Fashion, Men’s Fashion, Women’s Fashion, Foot Fashion, Bags, Luggage & Accessories and Watches, Jewellery & Fashion Accessories. The upper ground floor of the mall comprises only of exclusive premium fashion brands where customers have a wide range of options to choose from such as Zara, Lifestyle, Marks and Spencer, GAP, GAS, Steve Madden, Sephora, Mac, Nautica, Gant and many more,” adds Rathore.

“We specifically follow the concept of zoning very seriously. We have international brands on the ground floor. The women brands are accommodated in one area. Likewise, we have categories on every floor, which makes shopping very easy for the customers. There is a mix of everything. Indian brands are also coming to be at par with the international brands that we have. It’s more about what the customers want. The taste and demand of the customer also varies from different parts of the city. The customer is very different in Gurugram, Delhi and Noida in brackets of style, fashion, price and purchase. It is very essential to understand that. We select the brands accordingly. At the end of the day, it’s more about market research and customer choice.” agrees Gehlot.

“In terms of space – almost 56 percent of our anchors, mini anchors and line shops fall under the fashion category thus the area contribution of fashion category retailers is high in our malls,” said Gurnani.

Fashion: Big Revenue Generator

On an average, 60 percent of a mall’s revenue is generated by its fashion stores. Currently, the fashion category occupies approximately 60 percent of mall space in India – a number that may go up as per a mall’s target audience, but never down. Even government and private shopping centres and complexes given maximum space to the shops that sell apparels and accessories.

“People here spend more than 70 percent on fashion & lifestyle. The trend towards fashion is currently good and therefore, we have been adding more international fashion to the mall,” said Philips commenting on LuLu Mall’s perspective. At Inorbit, fashion contributes approximately 70 percent of the total monthly sales. Phoenix MarketCity makes approximately 40 percent of the total mall average revenue is contributed by fashion brands which is the highest among all categories in the mall. For them anchor brands like Zara, Lifestyle, Marks and Spencer and Pantaloons do very well in this regard. Pacific Mall fashion revenue turnout from fashion is about 60 percent.

“Ambience Mall allocates 80 percent of their space to fashion, so lot of revenue is generated from it. I won’t be able to disclose the exact amount, but I would say the majority chunk is generated from the fashion. It’s a healthy growth that we can see,” pointed Gehlot. At Prozone, the fashion category contributes almost 62-65 percent of the total sales. At Select CityWalk, over 35 percent of revenue is generated from the fashion



segment whereas the revenue percentage at the Quest Mall is 32 percent, at DLF Malls the percent goes up to 60 percent.

The Future

Indians have a very old affiliation with luxury. Luxury-goods sales in India grew 25 percent in 2014, compared with 7 percent in China as per a report published by Euromonitor. Over the next five years, spending in the Indian luxury market is expected to increase more than double to ₹23,600 crore from ₹13,200 crore.

JLL India predicts that fashion retailers will continue to command a prominent presence in Indian shopping malls. It is expected that more fashion brands will open ‘experience stores’ and newer formats and strengthen their footprint across the country. Established fashion retailers will look for opportunities in secondary and tertiary cities in order to grow further and national fashion retailers are expected to innovate and come up with newer

formats to sustain in the highly competitive market environment. Interactive and enhanced consumer experience will be the key for success for fashion retailers. The Indian fashion retail market is open for greater brand assortment but requires customised approaches as each market is unique with different requirements and preferences. Going forward, there will be more investments by international retailers to expand their networks to maximise profitability.

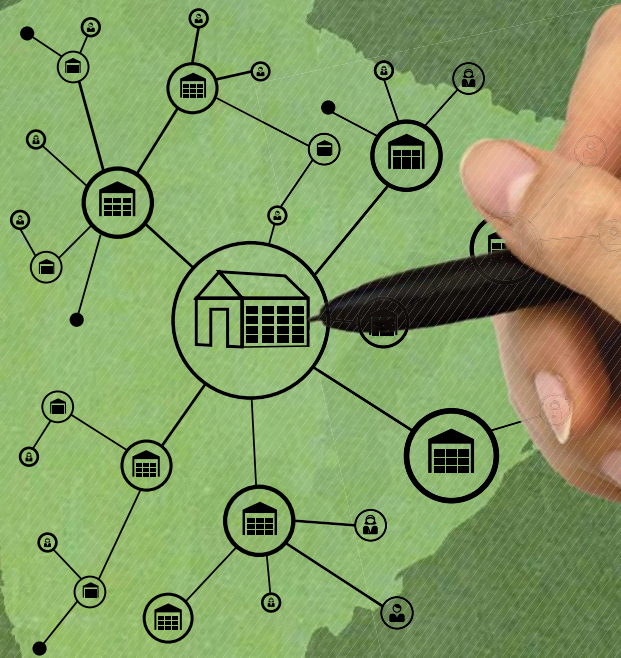
The fashion market in the country is in midst of change. The Millennials are using new technologies and are spoilt with unprecedented choices both in terms of product offering and convenience. Being able to serve such demanding consumers can be challenging, but at the same time provide an important opportunity for retailers. Only those retailers who are willing to adapt according to these market trends stand a chance to grow and capture the market. 

With Research inputs from Technopak, JLL India and Euromonitor



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AFTER GST, MORE FOREIGN FASHION BRANDS TARGETING INDIA EXPANSION

- By Dr. Rupal Shah Agarwal, CSO at Your Retail Coach

Whoever said GST has been a spirit damper should check out a few stores like Levis, US Polo Association, Charles & Keith, H&M, Zara, Mango and Uniqlo, the latest international entrants in the growing apparel retail industry in India...



Global cues indicate that the fashion industry is moving towards the Orient. In India, the growth story is obvious, but the understanding the success story of any international brand in the country lies in comprehending the pre and post GST era.

Exclusive European and US brands have extended their business in many Indian metros. The young and aspirational crowd, the classic middle-aged bunch thronging the freshly smelling new stores with enthusiasm have helped lure these brands Eastward. Whoever said GST has been a spirit damper should check out a few stores like Levis, US Polo Association, Charles & Keith, H&M, Zara,

Mango and Uniqlo, the latest international entrants in the growing apparel retail industry in India. And each of these brands is working towards changing the social fabric of the country with their retail experience.

Here is a quick overview of how some brands have gained after GST implementation in India.

Pre-GST Tax Structure

Not many players in the apparel trade are likely to forget the unorganised taxation regime as it hurtles into the dustbins of history. Manufacturers, retailers and all stokers in between knew they had to pay 4.5 percent VAT along with 2 percent excise duty. Added to this were the new way of serving consumers, via e-commerce portals. Many branded retailers were also giving

heavy discounts and it added confusion to the pricing structure. Various portals and even showrooms offered schemes like 'Buy 2 Get 2 Free'. Added to these were 'End of Season' sales that made customers wonder at the drastically slashed prices.

A lot has changed now that the GST is in place. Before GST came into force, branded clothes above ₹1000 were being taxed at flat 12 percent. The problem was

accelerated by the technical and technological glitches that accompany with the new systems. As foreign brands are used to the system for them it has been an easy-peasy solution to showcase their polished stocks. They have benefits the most by the technological ease and GST software compliance. It is now left to the locals to match their fabrics and brands with them.



Post-GST Structure in 2018

As e-commerce also chips in, foreign brands are able to add more muscle to the local industry by giving employment and introducing global norms. The Indian apparel industry is shaped by growth from three main divisions – menswear, womenswear and kids wear. They all come under the same GST ambit. Shirts, trousers, and denim wear have the most hold over the ₹1,24,423 crore (US \$19 billion) market.

This year, Japanese brand Uniqlo entered India with plans to go solo. Their main global rival is already in the country – Heinz and Mauritz (H&M) – and has previously taken over large retail spaces in leading malls. H&M, and other fast fashion brands like Mango, ZARA and Forever 21, will all be getting the benefit of the new GST regime of Asia's third largest economy, especially since the brands are geared to cater to the young and aspirational class with fresh stocks. All these brands together aim to open 10,000 stores by 2022 all over India.

As FDI in retail sector improves, one tax system is contributing at a national level. There is no confusion over different tax slabs. So,

FASHION BRANDS THAT HAVE ENTERED THE COUNTRY HAVE BOUGHT READY STOCKS FROM THEIR MANUFACTURING UNITS. THERE IS NO ADDITIONAL PAPERWORK OR DOCUMENTATIONS. THERE IS NO ADDITIONAL BURDEN OF DOUBLE TAXATION AS THEY ARE COMING FROM ANOTHER COUNTRY. ULTIMATELY IT IS THE CONSUMER WHO STANDS TO BENEFIT.

GST has come as a relief to all players as a level playing field has emerged.

GST: Re-Shaping the Retail Industry

Currently, foreign fashion brands that have entered the country have bought ready stocks from their manufacturing units. There is no additional paperwork or documentations. There is no



even if he is paying a slightly higher price, the benefits are enormous. The scissors have already been used to cut a lot of wastage in terms of many other business processes. In making the high couture trade more appealing to the Indian consumer the brand conscious consumer does not feel cheated as one price rules across the country.

For the companies that have already made the foray, the experience is better and fairly competitive. They find ease of business through:

- Control right from the warehouse for the inventory
- With technology it is easy to monitor stocks in various showrooms across the country
- With the use of cashless transactions, every deal is transplant
- Internal costs of transportation, logistics and delivery is more organised
- In every state, the taxation is uniform and unburdened with different payment structures
- With GST, there is no delay in any supply chain, payment to vendors, distributors
- Employees are being trained to utilize their time to focus on customer engagement rather than on the 'sale'
- The PoS system ensures that the potential consumer eventually comes to the counter and makes the purchase
- Different payment schemes have added the impetus to buy apparel at no extra cost

In conclusion, with the advent of GST, there is no reason why a brand's equity will not improve with the bespoke brand experience for the customer. **IR**

additional burden of double taxation because they are coming from another country. Ultimately it is the consumer who stands to benefit. For example, if a person is paying the same price of the garment no matter where he buys it from, it makes sense to make a local purchase where he will be allowed fitting, trials, and options of choosing sizes and colors and touch the garment.

It may be hard for the consumer to understand that



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SPAR HYPERMARKET LAUNCHES NEW INNOVATIVE STORE FORMAT

– By Charu Lamba

The latest store spans across 55,000 sq. ft. and has on offer over 50,000 products with 25 billing counters. The brand has designed the store to offer value in an engaging and interactive environment, using technology in new ways to deliver a truly amazing consumer experience...

SPAR Hypermarket, part of the Dubai based Landmark Group, has introduced innovation-led experiential shopping at its new store in Vega City Mall, Bengaluru.

The latest store spans across 55,000 sq.ft and has on offer over 50,000 products with 25 billing counters. It has been designed to offer value in an engaging and interactive environment. The brand has used technology and product in new ways to deliver a truly amazing experience.

SPAR seeks to deliver on its four pillars – Fresh, Value, Choice and Service. The new store offers all these along with providing the consumer with an exhilarating experience. The store includes differentiated sections such as Wonder Years for kids, Beauty, Grandma’s Corner, Taste of India, Taste the World, Freshly, SPAR Natural to name just a few. The store uses technology in an innovative manner with self-assist kiosks, an interactive digital SPAR Studio and the SPAR play pad to deliver this.

In an exclusive interview with *Indiaretailing.com*, **Rajeev Krishnan, Managing Director and CEO, SPAR Hypermarket** spoke about how the retail chain is at the forefront of introducing various innovations and technological enhancements with a view to delivering a fulfilling shopping experience across demographics and age groups.



What was the need for introducing a new format (need for the intervention of innovative and interactive technology in the Retail /FMCG space) and how is it different from the previous stores?

At SPAR, innovation is in our DNA. Our endeavour is to enrich the shopping experience of our customers. The new SPAR store at Vega City Mall is a big step in this journey. It has been designed to offer value in an engaging and interactive environment. We have used technology and product in new ways to deliver a truly amazing experience.

What does experiential shopping mean to you?

The larger and more organised we have grown in the industry, we have forgotten the basics of connecting one-to-one with our customers. Therefore, we have decided that it is time to innovate beyond transactional operations to create customer experiences that are shaped by both the intelligence



and emotional quotient (IQ and EQ). SPAR stores aim to offer an experience that each family member would look forward to.

What has been the response of the customers to the new format?

The reaction from the customers has been wonderful. The customers who have been flocking to the stores have expressed their happiness about the new way of shopping. This has also reflected in the footfalls to store. The store has been designed to appeal to everyone from the eldest member of the family with sections like 'grandma's corner' to the youngest member with the 'wonder years' section and we see the positive reaction of different groups of customers in these sections.

Do you see it adding more to the revenue? If yes, how much increase are you anticipating this fiscal?

It is understood that better the shopping experience, better the revenue. And experience today includes friendly staff, wide range of products, great value and finally and helpful and thoughtful technology like a self-assist or self-checkout aiding the shopping.

Is there any difference between the size of the

new and old format stores?

We think that while size does matter, in today's context - we (as retailers) need to find new ways to deal with constraints. We need to find new ways to offer the experience of large assortments and spaces within limited ones. There is added emphasis in making spaces more productive keeping in mind that we need to deliver outstanding customer experiences which appeal to both the emotional as well as the logical needs.

Highlight the innovation and technology collaborations at the store.

The Experience sections are a distinctive addition to the new format and are designed uniquely for customers, depending on the role they play in their family. Some of the sections like 'Home Sweet Home', 'Beauty', 'Little Wonders', 'Grandma's Corner', 'Taste of India', 'Taste of World', 'SPAR Natural' and 'Freshly' offer unique shopping experience.

Home Sweet Home: One can explore our range of outstanding home furnishings and décor to give home a perfect makeover. Customers can use the drag and drop feature at the 3D digital touch screen studio to try the look of the products.

Innovative & Interactive In-Store Technologies in Collaboration with Tech Partners At SPAR

► **SPAR SELF ASSIST KIOSKS:** This touch screen platform helps the customer navigate the hypermarket at the click of a button without the hassle of strolling through multiple aisles. This also sends intimation to five different store attendants to attend to this customer who is seeking help. This innovative development has come about as a partnership with BOSCH.

► **SPAR STUDIO:** This enables customers to avail 3D experience of products that they purchase, especially in the home furnishing section. This will help customers to look at colour/fabric options within home furnishings before making their final choice. The SPAR Studio has been developed in collaboration with Textronics.



► **SELF-CHECK-OUT KIOSK:** For the first time, the Vega City store opens with Cash counters where customers can check out themselves and pay their own bills. This really helps customers who would like to check out faster and independently. This new counter has come about as a joint action between SPAR and perpule.

► The store also features collaborations with NEC on the Food App which allows customers to choose their products and order by themselves at the SPAR Refresh Counter & the electronic visual SEL developed in collaboration with perpule. There is also a SPAR Play which offers infotainment content for kids at their section along with providing scope to play around with their creativity.

Wonder Years: This section is all about the kids and the inner kids in adults. One can explore the kid's section designed to cater to needs of little angels and their entertainment.

Grandma's Corner: This section has all that and much more to remind customers, the taste of childhood.

Taste the World: One can enjoy the cuisines from all over the world at taste the world.

Taste of India: Here one can taste the *desi tadka* of local flavour and relish the dishes from India.

Elaborate on Omnichannel strategy of the brand.

We look at Omnichannel as truly what is it supposed to be – c-commerce (collaborative commerce) or commerce that we can see anywhere. We are excited to have rolled out www.sparindia.com and are tremendously excited about the current growth and traction we are getting. While still in its early stage, we see a huge opportunity for this vertical to be a strategic driver of our SPAR stores overall growth. We do also see white spaces which are currently not being addressed.

We believe that India needs both brick-and clicks to co-exist. With the brand connect and loyalty at our SPAR stores being our differentiator, we intend to use merchandising and technology as the strategic pillars to continuously offer Omni-retailing opportunities as never seen before through strong and innovative partnerships across the different retail verticals.

One of the ways in which we are making this happen are by bringing the SPAR

brand closer to customers.

- A touch screen digital kiosk where customers can place their orders and get deliveries at home
- The SPAR on wheels concept where a truck laden with the freshest fruits, vegetables and more visits apartment complexes and residential areas.

Give us insight into your loyalty program.

Landmark Rewards is the Landmark Group's loyalty program which allows you to earn valuable rewards points on your purchases and spend them for instant savings. It is also one of the largest retail loyalty programs in India.

Customers can enroll to Landmark Rewards when they shop at SPAR or any of the Landmark Group stores in India. The program reflects Landmark Group's commitment and passion towards enhancing its relationship with customers across diverse brands. Landmark Rewards covers a total of nine brands and opens a world of privileges to over 10 million members. Currently over 72 percent of SPAR sales comes from Loyalty Programme members and the programme has been awarded as one of the best loyalty programmes by the Indian Retail Federation.

Tell us about your future plans and expansion plans.

We have just celebrated our first decade of having opened the first store in Bengaluru in 2007, and currently operate 19 stores across Bengaluru, Mangalore, Coimbatore, Hyderabad, Delhi, Ghaziabad, Gurugram, and Chennai. The average store size being around 40,000 sq.ft and looks at offering a wholesome assortment covering Fresh



produce, fish & meat, staples, consumer packaged goods, home and living products and more.

Our growth is clearly driven both by our customer understanding of the markets we are in and the customer's loyalty and love for us. We will continue to grow and expand in and around those markets so that we continue to deliver a better experience to our customers. We already have over a million sq.ft. and plan to keep growing at 30 percent or more each year. We are exploring and innovating specifically around different formats, Omnichannel and technology to see how we can grow smarter and faster.

What is your vision? Is the discount retailing model something you intend to chase in the future? What is your path to profitability?

We have a simple customer led vision – 'To be the most engaging and innovative hypermarket in India.' Making a difference in the lives of teams, customers, communities, and shareholders, every day. We are always in a process of evolution and we will respond to the market based on what customer needs are. We will continue to focus on offering our customers value on both food and non-food and build loyalty and share of wallet. **IR**

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INDIAN BRANDS REVIVE **ETHNIC WEAR GENRE,** INCREASE SPACE ALLOCATION IN MALLS

Today, the ethnic wear genre is here to stay and going by recent trends, it plans on leading the way for women's wear in India. We track the dynamics of ethnic fashion in malls today...

– By Zainab S Kazi

A quick peek into an urban women's wardrobe in India will accentuate the fact that Indian ethnic wear is facing stiff competition from Western wear. Western wear has made strong inroads into the Indian woman's closet, not just in Tier I cities but also in Tier II cities and small towns as well.

Having said that, it is comforting to also learn that Indian ethnic wear brands have taken it on themselves to revive the genre and give it a fresh and modern twist thus attracting women from different classes and strata of society.

Today, the ethnic wear genre is here to stay and going by recent trends, it plans on leading the way for women's wear in India. We track the dynamics of ethnic fashion in malls today...

W

ith the likes of the Zaras and the H&Ms which have entered into the country, would it be right to say that fashion is becoming synonymous with western wear and that women in India are giving a cold shoulder to ethnic clothes? A walk in a mall may perhaps answer to question. Where western wear brands stand tall in malls with huge sq.ft. space, there is an undercurrent of ethnic wear brands too. Until a decade ago, ethnic wear was more or less restricted to bespoke clothing where the neighborhood masterji aka tailor had women coming to him to get suits stitched.

However, all this changed when brands like BIBA entered the market and led way for other brands to gain a foothold. Gradually, not only formal and festive wear, but also casual Indian wear found standalone stores – both branded and non-branded.

The Game Changers

When the mall revolution began, in the initial days, exclusive brand outlets for ethnic wear were hard to find, but things rapidly changed. Leading the game were brands like BIBA, BIBA Girls, W, Global Desi, Soch, Fabindia etc. Not all of them offer pure ethnic wear range but the portfolio is more tilted towards desi fashion with a modern twist.

Rima Pradhan, Senior Vice President, Marketing at Viviana Mall shares, "It would not be incorrect that the kind of brands that we have in the ethnic wear category is one of the reasons behind keeping

ethnic fashion trendy among youngsters." She further brings in the point of how the cult of Indo-Western wear is proving to be a boon for ethnic fashion. "Customers are willing to experiment which has increased demand for Indo-Western wear, fusion wear, etc. This is the prime reason that even ethnic wear brands are creating a variety of options that customers can explore for their special functions."

Siddharth Bindra, Managing Director, BIBA, encapsulates the changing ethnic wear fashion dynamics seen through the lenses of his brand, "Fashion

landscape has undergone major transformation over the last few decades. Owing to people are fast changing fashion preferences, brands are constantly curating new designs and trends be it bold colours, new styles, fabrics and prints. For instance, BIBA, in 1998 started with designing *salwar kameez dupatta* (SKD), which became extremely popular. Today BIBA offers a complete ethnic wear range which includes formals, semi formals, Mix and Match as well as heavy occasional wears. BIBA has also expanded their bottom line range which includes leggings, skirts, different types of pants and palazzos. In 2010, we launched Biba Girls, a dedicated range for young girls aged between 2-12 years old and decided to cater to slightly older girls within 15 years of age group because of increasing demand. To

further strengthen its existing portfolio of ethnic wear, BIBA forayed into accessory segment aiming to provide a 'complete look' to its patrons."

Rajneesh Mahajan, Chief Executive Officer, Inorbit Malls echoes the thought on ethnic wear gaining a momentum post brands adding in a touch of modernity to the collection. He says, "Fashion is an ever evolving and vibrant segment. Indian consumers are getting more and more conscious regarding their looks. Their preferences have grown towards ethnic apparels but with a touch of modernity. According to us, a contemporary fashion trend which is getting popular in recent times is fusion wear and now days it is a preferred choice of people of all ages."

Sharing details on the promising categories within the ethnic wear, Bindra shares, "Mix & Match collections have become a dominating category in the modern ethnic market. Modern customers have become more fashion conscious and opt for chic looking outfits for their regular activities. Women always do not like wearing for complete ethnic sets and prefers creating looks which gives their attire a contemporary twist. This change in the customer behavior has helped brands evolve its collection keeping in mind the prevailing fashion trends." It is interesting to note that BIBA has 245 stores across the country today. Bindra adds, "Our growth rate has been steady, and we are growing at 30 percent CAGR. Promising markets- top 8 cities- Delhi, Mumbai, Kolkata, Chennai, Bangalore, Hyderabad, Pune and Ahmedabad."





“Fashion is an ever evolving and vibrant segment. Indian consumers are getting more and more conscious regarding their looks. Their preferences have grown towards ethnic apparels but with a touch of modernity. According to us, a contemporary fashion trend which is getting popular in recent times is fusion wear and now days it is a preferred choice of people of all ages.”

– **Rajneesh Mahajan**,
Chief Executive Officer,
Inorbit Malls

Festive Fundas

Indian festivals and occasions like weddings demand dressing up the ethnic way. Hence ethnic wear scores higher in the formal category as compared to casuals. Pradhan explains, “Gone are the days when a *lehenga* would be sufficient for wedding. Now, each ritual has a different outfit – *mehndi*, *sangeet*, *haldi*, wedding, reception ... each event needs a different outfit and with each outfit the accessories change. Also, it’s not about repeating the same dress or style that one saw his/her best friend wearing for their wedding. Everyone wants to look unique and different



“Customers are willing to experiment which has increased demand for Indo-Western wear, fusion wear, etc. This is the prime reason that even ethnic wear brands are creating a variety of options that customers can explore for their special functions.”

– **Rima Pradhan**,
Senior Vice President, Marketing,
Viviana Mall

for their functions. Today’s generation wants everything perfect and this demand has made ethnic wear brands to think out of the box.”

Mahajan adds, “Ethnic fashion brands during specific times in a year deliver huge brand campaigns and introduce new merchandise. One such time is the wedding season when brands spend on TVC’s, OOH and also run promotional offers and schemes in malls.”

Bindra further says, “We see an increase in sales during wedding and festive seasons. The sales jump approximately around 20-35 percent during that time.”

At Mumbai’s Viviana Mall, Pradhan highlights that with increase in demand for ethnic wear, the number of ethnic wear brands has increased too. She says, “Currently, we have 18 stores in our mall



“BIBA offers a complete ethnic wear range which includes formals, semi formals, Mix and Match as well as heavy occasional wears. BIBA has also expanded their bottom line range which includes leggings, skirts, different types of pants and palazzos. In 2010, we launched Biba Girls, a dedicated range for young girls aged between 2-12 years old and decided to cater to slightly older girls within 15 years of age group because of increasing demand.”

– **Siddharth Bindra**,
Managing Director, BIBA

like Ethnicity, Manyavar, Global Desi, W, Soch, Jashn, Nalli, Cotton Culture, Biba, Go Colors, Indifusion, L’effet, Kalki, Aurelia, Hastkala, Meena Bazaar, Cotton Village and Suloch. We have added brands like Indi Fusion and Go Colors in the last two years in the ethnic wear segment.”

All put together, at Viviana, ethnic wear stores occupy around 20,560 sq.ft. of space. What accentuates the growth of ethnic fashion is the fact that most of the brands in this category are seen increasing their footprint and there are host of new brands entering the category as well.

Mahajan states, “At Inorbit, we have brands like Fabindia, Biba, W, Soch, Ethnicity all requiring bigger stores. We now have Global Desi and Fusion Beats who sell ethnic fusion wear. Both these stores didn’t have EBOs (Exclusive Brand Outlets) in our mall earlier. We recently opened an outlet of *Hastkala Sarees*, which is a 21-year-old traditional ethnic wear retail chain offering a range of *sarees*, *lehengas* etc.” At Inorbit, the ethnic category occupies around 40-45 percent area of the space.



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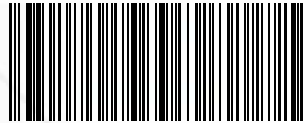
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Space Allocation

Where the ground floor is usually allotted to a multi brand store, we see the presence of western wear brands across the malls. The ethnic wear brands in majority of the malls though are all zoned together. According to Pradhan this is based on the demand of the shoppers who prefer “everything in one go and one place and hence we have zoned our mall in such a way that a customer knows exactly where he/she will find a particular category of product in the mall. We have carefully zoned our ethnic wear brands on right hand side of first and second floor”.

Mahajan adds, “An ethnic brand will be a better fit next to a brand offering similar assortment and complementary products. The focus is on helping people make easier buying decisions and not necessarily zoning similar categories together. At Malad, we have the women’s ethnic zone carved on level 1 where we have and assortment of different brands.”

the name – “Wedding Fair at Viviana Mall.” The shopper is enticed with a host of activities.

Elaborating on the same, Pradhan says, “We invite *mehndi* (henna) artists, fashion consultants, honeymoon destination consultants, hair style and make up experts etc. The best of best wedding collections are showcased by all our ethnic wear brand partners. We run a special social media contest and shortlist 10 couples that are planning their wedding. With these 10 finalists we do some



the wedding fair, the response to ethnic wear collection during the wedding season is phenomenal.”

Like Viviana, Inorbit too has a wedding festival. Elaborating on the same, Mahajan says, “At Inorbit, we host a wedding festival every year. The event engages customers in various activities like shop and win contest and rewards them with holiday packages, gold pendants and gift vouchers. Ethnic brands come forward and create interesting visual displays of the wedding collection for shoppers to know the latest trends and styles. There are



various other events initiated by ethnic brands like *Salwar Kameez* Fest, Dress Festival etc. throughout the year.”

The Road Ahead for Ethnic Wear

The category for ethnic wear in India has enough space for more brands to enter. If BIBA can go ahead and have another exclusive store for girls (BIBA Girls), it speaks volumes on the gap the genre has in the market. Bindra shares, “Initially the ethnic wears category was largely restricted to older age groups. However, it is now finding acceptance amongst modern customers owing to the new designs, styles, prints and colors. Traditional ethnic

wears are worn occasionally while regular day to day ethnic wear has seen an increased customer base.”

And to conclude with a quote from him on the challenges the industry faces, which if taken care of, can boost the industry: “Although retail industry in India is one of the fastest growing industry in the world but there is a lot of scope for improvement. Various state policies and local influences, largely poses hindrance for the retail to expand rapidly. The high cost of real estate, excessive discounts offered by e-retailers, non-availability of skilled labor are a few challenges that may hinders the growth of retail industry.”



Dedicated Initiatives

To promote ethnic wear and generate the interest of shoppers towards this category, it is interesting to note a special property created by Viviana Mall by

fun activities like dancing, treasure hunt, singing, etc. which helps them connect with each other while having fun. The winner is awarded a honeymoon trip sponsored by Viviana Mall. Because of



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KAZO

With 160 PoS located pan India, Kazo Fashion Limited,

an India-based womenswear brand offering international fashion trends at affordable prices, is in pre-expansion mode. The brand aims to open 35 more pos to reach a figure of 200 PoS by the end of the current financial year. Currently, Kazo has 60 EBOs and 100 shop-in-shops.

Deepak Aggarwal, Director, Kazo says, "With an investment of ₹100 crore, we want to reach the figure of 500 PoS in three years from now."

Kazo is a premium high street western wear brand that has made its way into the center of the fashion industry within a short span of time. It constantly tries to push the envelope to bring the best and latest of fashion from around the globe.

The brand is a home to contemporary, chic fashion, which represents a mindset and an attitude, not an age. It is designed for the modern Indian woman who is confident, glamorous and sensual, who leads a sophisticated lifestyle.

The garments designed by the brand are phenomenally fashionable with a high wear ability and practicality quotient. The main asset of the collections is that they are highly affordable, which means latest designer wear is accessible to all women, then be it office wear or occasion wear outfits.

The brand's pricing strategy is pretty reasonable, making it affordable and available to a wide economic spectrum. The price range for an 'easy day wear top' starts from ₹1290, while a cocktail dress can cost up to ₹8000.

THE BEGINNING

Kazo opened its first store in 2007 in Delhi. The brand completed 10 years since launch last year and is hoping to maintain the upward growth trajectory in the popularity chart among consumers. Recognising a gap in the Indian market for affordable dressed up international fashion wear, Aggarwal created a homegrown contemporary fashion brand for women.



KAZO TO OPEN 500 POS WITH ₹100 CRORE INVESTMENT OVER THREE YEARS

– By IMAGES Retail Bureau

Kazo Fashion Limited, one of India's premium apparel and accessories womenswear brands aims to give exclusivity to the buyers both on corporate and party wear outfits

Under his proficient foresight, the brand has established stores in major fashion hubs and cities across India. Aggarwal has used his aptitude of mastering all aspects of management, design, sales and marketing to position Kazo as a quality brand through creative designs and innovative marketing strategies. Aggarwal's belief in professionalism has led him to build a core team of experts from in all aspects of brand retail. The team has been carefully selected to carry forward the ambitious vision. With the growing popularity of the brand, Aggarwal continually motivates his team to set new performance benchmarks. His leadership and management skills has been iconic .



“ KAZO HAS BEEN IN THE MARKET FOR THE LAST 10 YEARS NOW. IT'S A WOMEN'S WESTERN WEAR BRAND WHICH IS AFFORDABLE FASHION, COMING STRAIGHT OFF THE RUNWAY TO THE MARKET - THAT'S THE USP OF THE BRAND. ”

- Deepak Aggarwal, Director, Kazo

BUSINESS MODEL

Kazo's business model is focused on a basic retail model. In one line it can be described as 'fashion from the runway to the store.'

"Kazo has been in the market for the last 10 years now. It's a women's

western wear brand which is affordable fashion, coming straight off the runway to the market - that's the USP of the brand. In this short period, Kazo has established itself as one of the best fashion retailers in India.

The potential is huge and brands need to understand that and strategise to be able to draw optimum benefits in this growth phase for the Indian apparel industry. Serious players with greater adaptability to competition and change management will get stronger. With a higher number of younger people the fashion category will grow faster than the basic ethnic wear," says Aggarwal.

So, what moves the mechanism of Kazo? The main factor behind the brand's success is that its turnover time is really fast. The logistics involved are fast, and efficient - from the time a design/style hits the runway to the time it reaches Kazo's store on ground is a paltry three months, and sometimes even less than that.

What differentiates the brand from its contemporaries - domestic and international - is the fact that the brand makes an effort to upgrade latest trends and styles and designs for its consumers.

"What we do differently is that we try to give a more

upgraded trend to our consumers. We are not as basic as fast fashion brands. We are not available in bulk everywhere - we give exclusivity to our consumers," explains Aggarwal.

A part of this exclusivity includes great in-store experience. The management focuses and invests a lot in training the front-end staff to ensure they understand how to deal with a consumer and convert her into a repeat customer. Special sessions are conducted to create good in-store experience, and they are also armed with information about the product, the style and design.

HIGH STREETS VS MALLS

The age-old conundrum for brands - do we open stores in malls or high streets, doesn't seem to faze Aggarwal too much since he has built a very clear location strategy for Kazo, especially since the brand has a very deep and detailed expansion plan lined up.

"We have a full point strategy and we know where we are going to open the stores this year and why we are picking certain locations. Our approach is also quite flexible. We don't really have a preference - malls or high streets - it all depends on the opportunity. Right opportunity at the right place and it has to make business sense," says Aggarwal.

Kazo is a product-centric brand. Currently, the brand is generating an increase in revenue up to 30 to 40 percent every year and they are also open to funding with the right partners. It is also recently working a lot on giving better in-store experiences to consumers. **IR**



'OMBRÉ LANE WAS LAUNCHED AFTER MONTHS OF CAREFUL RESEARCH ON THE INDIAN WORKING WOMAN'S BODY TYPE'

The apparel brand focuses on providing customers with a superior product design, quality and fit along with a well-categorised website experience with quality customer experience...

A

s per a BCG-Facebook study, the online fashion market in India is poised to

growing share is Ombré Lane. Founded in July 2017, Ombré Lane is an upcoming versatile fashion brand, with an objective to create beautiful and comfortable workwear

Idea Behind the Brand

The business ideation came from a personal pain-point of not being able to find fashionable and quality work clothes for the Indian

and countless social engagements.

Early Difficulties & Challenges

The biggest challenge was to create the right fit for the working class. Unfortunately, most of the choices available today are not made keeping the Indian body types in mind. We did months of research on body types for the Indian women, especially on measurements and fabric, before finalising our designs and the right fit.

The Product

Ombré Lane offers a wide and distinctive range of workwear collections with constitutive details like no gape buttons, darts, back yokes and curved hems for easy movement and better fit. We also cater in dresses that are lined and have functional pockets. The workwear not only ensures functionality but also includes feminine features like laces, pipings, and bows to celebrate the element of the modern woman. We will soon be launching the pants and the skirts collection.

We design our clothes in-house, source quality fabric and manufacture the product within the country. The garments are tailored with handpicked durable



reach \$14 billion by 2020, with the women shopper share increasing from 39 percent to 48 percent. The modern women's western wear is set to increase its share to 18 percent from 14 percent of the total online fashion market.

One brand which is looking to capitalise on this

for modern working class Indian women.

In an exclusive interaction with IMAGES Retail Bureau, **Shweta Sharma, Co-Founder, Ombré Lane**, talks about the business proposition and future aspects of the newly launched brand.

women. Emphasising on the importance of the women's apparel as one of the fastest growing segments of the market, we decided to use the premium quality fabrics to form the workwear for working-class women, fitting into their daily requirements of meetings, conferences



and soft feel premium fabrics that we source directly from the top manufacturers and distributors across the country that supply to luxury brands and designers. We use machine washable and durable fabrics, keeping in mind the daily and busy lifestyle of our consumers.

Business Development

We want Ombré Lane to be extension of our thoughts, aspirations and personality. We plan to establish Ombré Lane as a go to destination for modern Indian women wanting to buy premium work clothing.

We are a customer focused brand and look to incorporate customer feedback in everything we do - from our

designs and fabrics to our website and content.

Revenue Targets

We are growing over 100 percent month-on-month and plan to continue to momentum as we scale in the coming months.

Choosing a Franchisee

We currently have no such plans.

Expansion Plans

Going forward, we plan to establish our brand as a go-to destination for modern Indian women, wanting to buy premium work clothing. We plan to scale significantly over the next one-year while staying focused on building our brand. Over the next

couple of years, we'll focus on launching more collection and categories, while focusing on digital channels. Post establishing our brand online, we do want to expand into offline stores in a few years.

Funding Plans

We are a self-funded organization for now.

Online & E-Commerce

We currently retail online via our website www.ombrelane.com.

Price Range


Due to our vertically integrated business model, we offer superior quality fabrics and high on fashion designs, while still being in the premium segment. Our

focus is to place the best in terms of quality, design and fit for aiding consumer choice and satisfaction. The price points for our collection starts from ₹1500. We offer superior quality fabrics and high on fashion designs, while still being in the premium segment.

The Competition

Women's workwear is a fairly under-penetrated market in India. Ombré Lane is focused on providing the customers with - superior product design, quality and fit; better-categorised website experience with quality customer experience and guidance. Work clothing across the world has moved to comfortable clothing that flaunts one's personality and femininity, whereas in India it is still in struggling phase with lack of variety in work clothes. Their only choice remains the plain boring shirts which don't go with their personality on most of the occasions, hereby subduing their femininity. We want to fill the gap by creating soft feminine, fashion-forward, superior quality and versatile workwear that is just in line with the modern, sophisticated and beautiful women in India.

Promotional Campaigns to Lure Consumers

We are not a discount-oriented brand. Regarding promotions, we mainly rely on digital advertising. We will continue to leverage digital advertising channels along with occasional pop-ups. We have done a couple of successful pop-up stores, and we plan to leverage them going forward as well. 

PRODUCT RANGE

Ombré Lane's collection is based on three themes that blend with the modern lifestyle and workwear.

The Boss Lady: The category is dedicated to the female-dominated or female-oriented hierarchical management boardrooms. These female bosses are the transformational leaders, serving as role models for the modern society as well as the corporate world. The collection includes neatly tailored plain and printed shirts, blouses and dresses in cotton, silks and fine georgettes that can be styled effortlessly for formal meetings or post work hangouts. Formal attire meets lunch get-away!

Work to Wine: The category provides the perfect outfit for a smart workday as well as after work rendezvous. The luxurious collection celebrates life and versatility in the form of shirts, blouses, and dresses in silks and fine georgettes. The eye-catching florals incorporated in this collection are inspired by the bold woman of today who is not afraid to stand out and showcase her individuality.

Chic Casual: This category is for the women who prefer smart casuals and likes to add chic to her attire. The collection includes apparel that allows freedom of movement, but in classic or in-trend shapes, styles and fits. We have incorporated more casual fits and prints for these styles; however, they can still be styled for work as effortlessly as for casual getaways or weekends.

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