

BUSINESS OF FASHION

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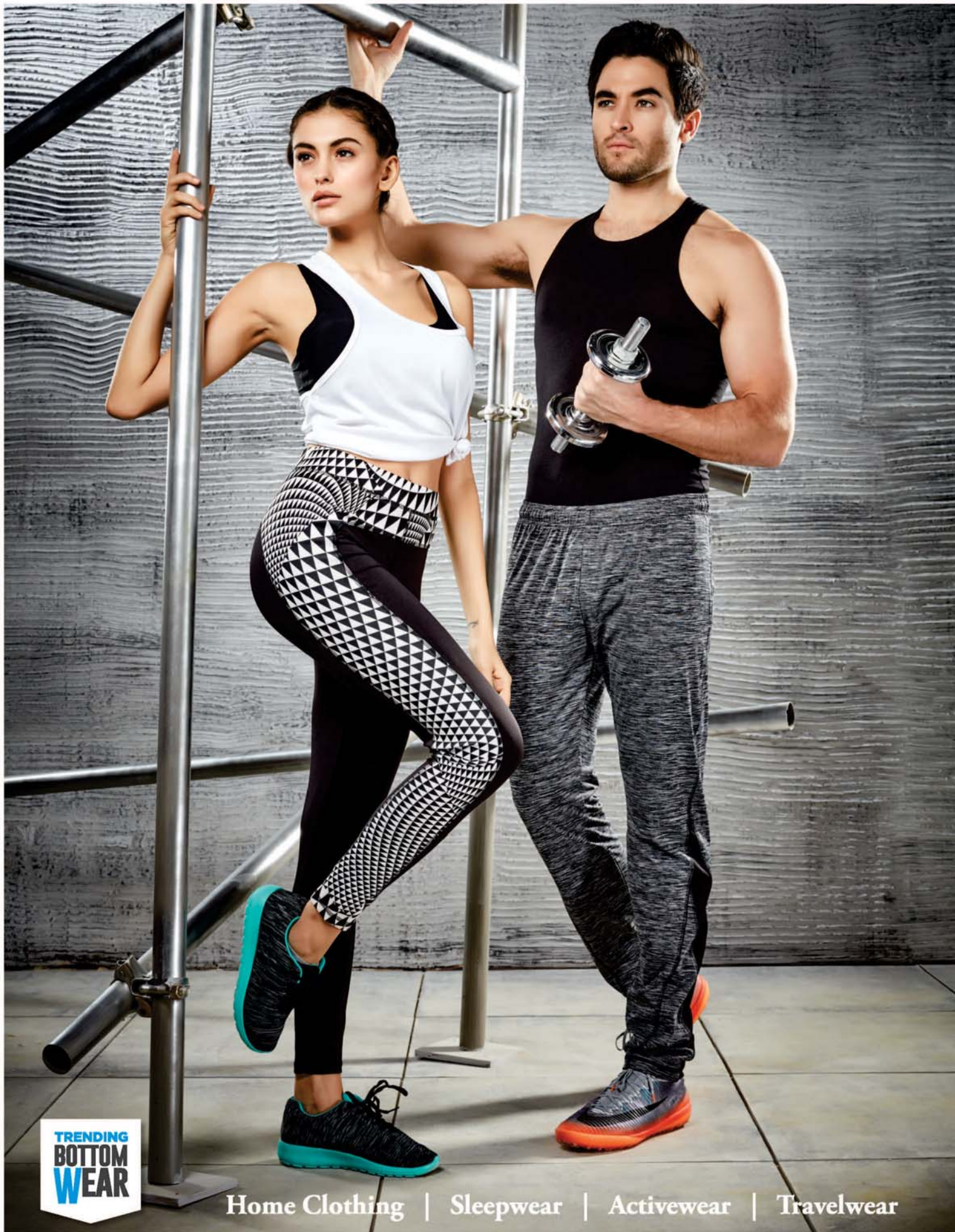
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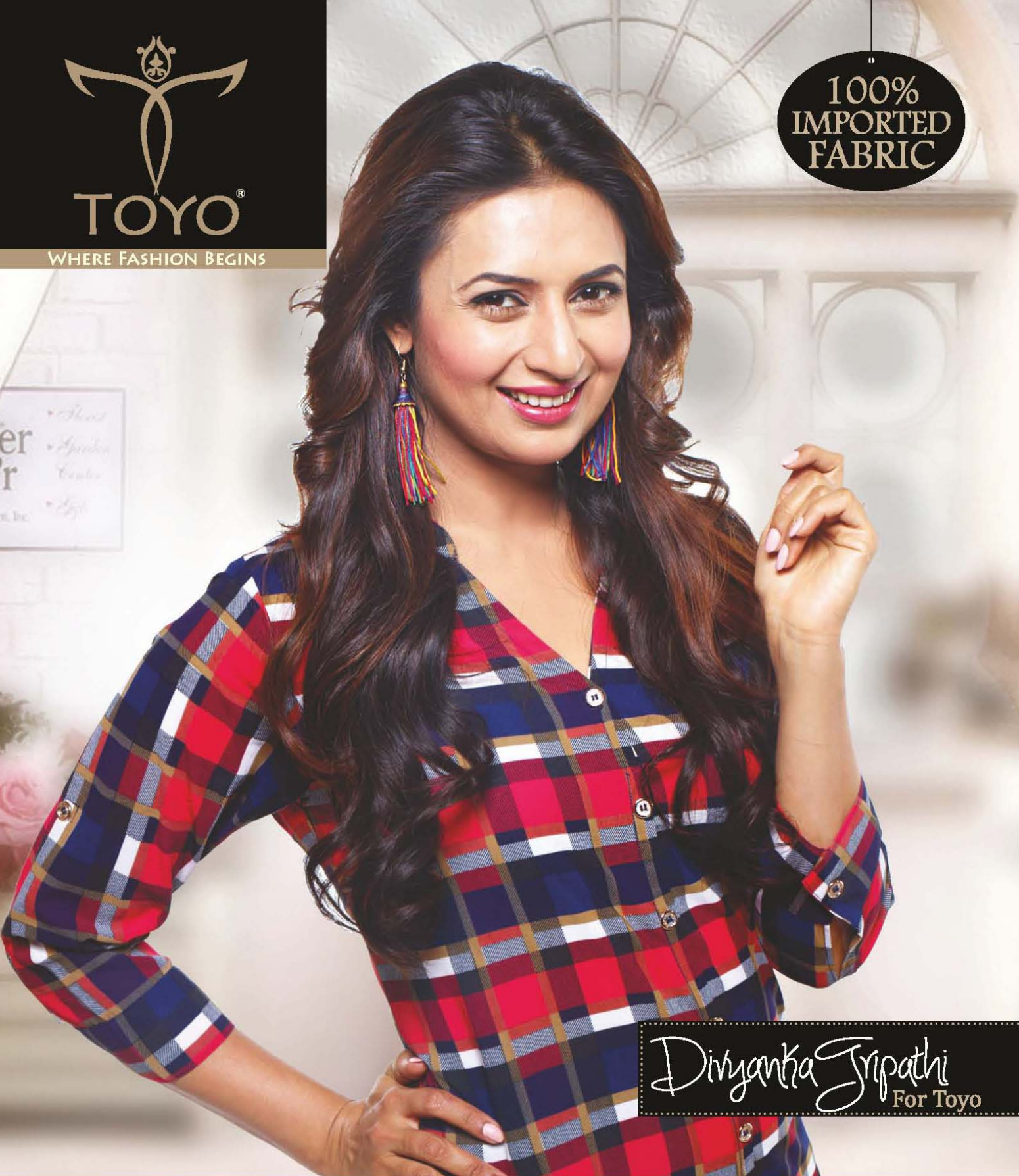
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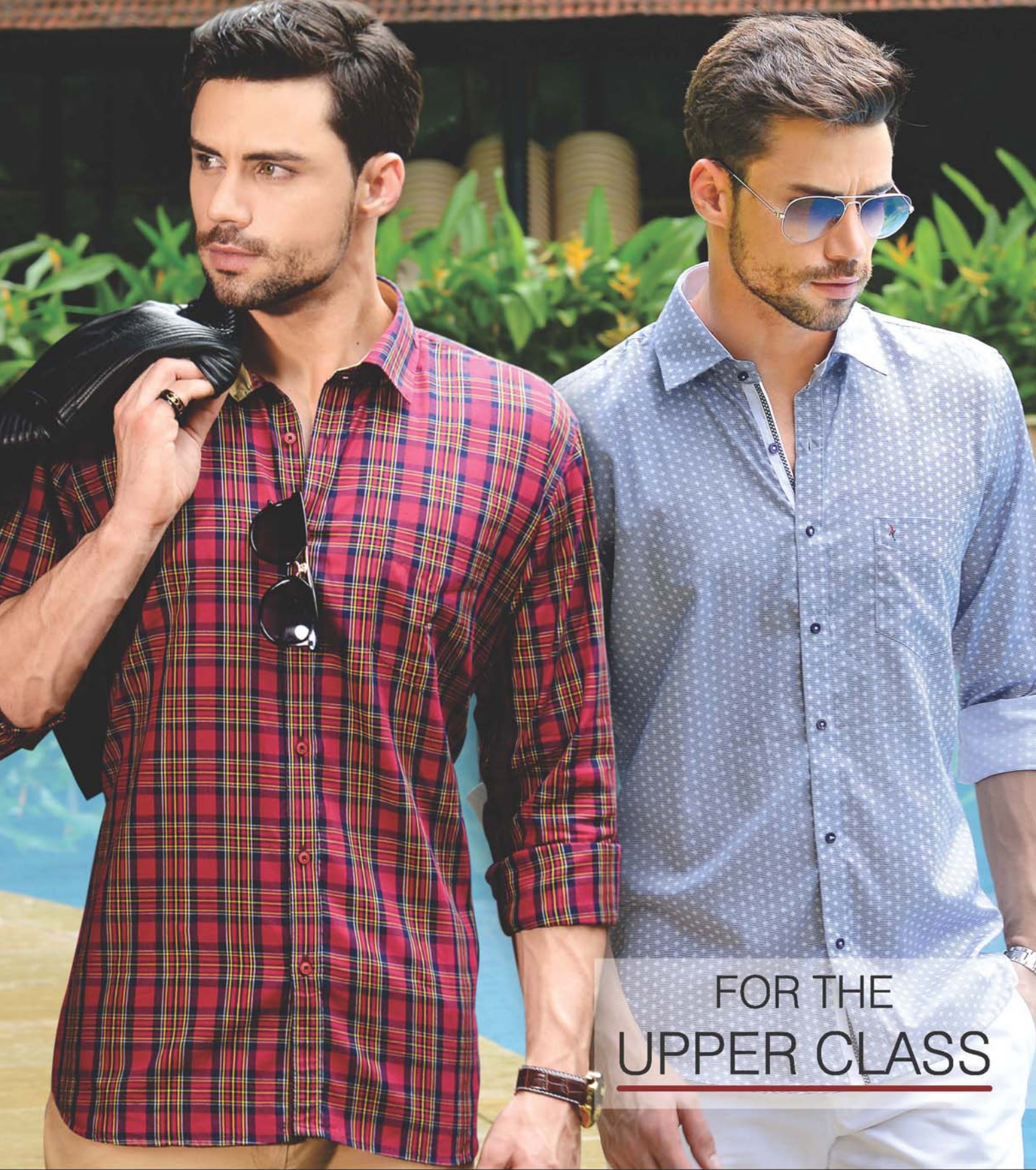
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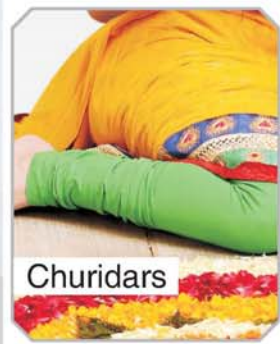
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BRIGADE

Dear readers,

It was an absolutely onerous month for all of us at IMAGES BoF. IFF 2018 turned out to be one of the biggest in its history and while the success of the event was unreservedly fulfilling, putting together the follow up issue, considering the multitude of gems of wisdom laden in the sessions, turned out to be an arduous task.

Let me start by thanking you all who were a part of the two day extravaganza. Inorbit, Infinity, Select CityWalk, Orion, The Arvind Group, Reliance India Ltd., Raymond, The Woolmark Company, Stylumia, Myntra, Pretr, Adidas, Best Seller India, Deal Jeans, Splash, TRRAIN; as well as our knowledge partners Technopak, WGSN, Yakobian, Wazir; NIFT; all the exhibitors; India Brand Show participants; the speakers, panelists and all IFF delegates. BS Nagesh and Bijou Kurien were once again our great mentors and in particular, I wish to extend my gratitude to one person— Suresh J —the Chairman of IFF '18. Thanks to your support, the 18th edition of IFF went miles in drawing a current and truly meaningful perspective to the business of fashion in India. It was unique in as much that it moved a long way forward in crystalising upon the core tenets driving this dynamic business.

A new addition to the regular IFA awards, this year saw the addition of a new award category -- The Presentation Awards which honored The Most Valuable Fashion Startups of 2017, Most Profitable Design Concepts, Most Effective Marketing and Promotion Campaigns, Most Exciting Innovations and Most Effective Tech Implementations of 2017, etc.

Solo X was a resounding success once again. Ganesh Subramanian's insights on Neuro-Prediction of Buy Buttons were a total delight.

IFF 2018 also registered an astounding international participation. Retail Guru Michael Yacobian, for the first time, conducted a master-class for the IFF Privilege Club Members that focused on in-store interaction principles for associates to craft the perfect Buying Environment. Also in attendance was a long list of luminaries from Yale School of Management, Iowa State University, University of North Texas, Oklahoma State University, Retail Management Consultants-UK, Lima, Dyson, Amazing Jewellery, et al.

Also in this issue, trend guru David R Shah reveals the evolving science of trend forecasting, and other experts share insights on the Indian Luxury, and the Indian denim market. The House of Anita Dongre talks about how they are empowering women through their production unit in Jawhar near Mumbai, and an exhaustive report on Fashion E-Commerce in India.

For those who missed the event, this issue of IMAGES BoF brings you a detailed report on all the key sessions and deliberations at the India Fashion Forum 2018. I strongly recommend that you, dear reader, go through the issue with a pen in hand, quickly marking off the insights that are of actionable value and ideas that are eminently replicable or inspiring.

Best wishes always!



Amitabh Taneja

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LETTERS TO THE EDITOR

The quality and the layout of the magazine makes it stand out in the market. The strong editorial content and consistent number of business insights makes it an important monthly for me to have on my shelf!

-Sumedha Sagar, Entrepreneur, Surat

Images Business of Fashion has a strong credibility. As an industry professional I look forward to the in-depth stories and discussion of industry issues each month.

- Pankaj Dutta, Retailer, New Delhi

The March issue of Images Business of Fashion is worth archiving with the profiling of various prominent personalities packaged in one issue. Great job done!

- Ankur Gupta, Entrepreneur, Jammu

I look forward to receiving the issue every month and the delay in the release of the issue was disappointing. However, it was worth the wait since the March issue is a knowledge bank. The content is informative, well written and well designed.

- Anant Chauhan, Retailer, Hyderabad

Dear Anant, the issue was targeted to launch at India Fashion Forum 2018, as had been communicated, regret the inconvenience.-Editor

The March issue was a highly elucidative issue. It is very encouraging to read about so many women fashion leaders and the masters in fashion business. It is a very progressive signal for the Indian market.

- Suyash Srivastava, Senior Executive, Indore

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Stores



Jack & Jones
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EMPOWERING WOMEN

**ANITA DONGRE
FOUNDATION LAUNCHES
PRODUCTION UNIT IN
JAWHAR FOR WOMEN
EMPOWERMENT**

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DENIMS

Review of the Indian Denim Market: Its challenges & key opportunities

Kavinder Mishra, Managing Director of Pepe Jeans India shares his key learnings on the progressive retail market, the new generation of denim consumers, the evolving digital channel and the challenges that the market is facing.

Pg No.48-50

LUXURY MARKET

The Evolving Indian Luxury Market

Rahul Kapoor, Co-Founder of Excedo Luxuria sheds light on the new Indian consumer who is eager and open to new brands that are ultra fashionable, globally noted and promise to lend him a social status.

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BRANDING

The Innerwear Brand Marathon

Nishchal Puri, Managing Director of Horizon Consulting India shares his insights on how the inner wear market is expected to unleash a new fervour and a new era of retail space competition.

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FASHION GURU

**Trend Forecasting:
Behind the Scenes**

David R Shah elucidates the concept of trends and what it takes to get an insight into what the next emerging trend may be and show the direction and potential reaction of consumer culture.

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CONNECT

Fashioning a Great Connection

Abhishek Bansal, Executive Director of Pacific Group maps India's success as a fashion destination and the future direction in this article.

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JACK & JONES

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LOCATION: Pune (Phoenix Marketcity) | **SIZE OF THE STORE:** 6,000 sq.ft.



Collection

The store houses international styles from the latest Spring-Summer 2018 collection displayed in separate sections depicting the brand's distinct lines such as Core, Originals, Vintage and Premium, each catering to different target groups with unique visual appeal that perfectly replicates the brand's core identity of self-confidence, free-spirited individuality and rugged masculinity.

Store Theme

The sprawling Jack & Jones store is spread across an impressive area offering latest international trends with a state-of-the-art decor for a truly luxurious shopping experience.

Store Interiors

The swanky new store is conceptualised to give the patrons an evolved shopping experience. Since Jack & Jones is built on a passion for denims, which is also the core business of the brand, the layout and visual merchandising of the outlet is adapted to focus on the denim attitude and offers a freewheeling vibe which is in complete accord with the brand's identity. Displayed on a denim bar, the store showcases the widest selection of jeans the brand has to offer.





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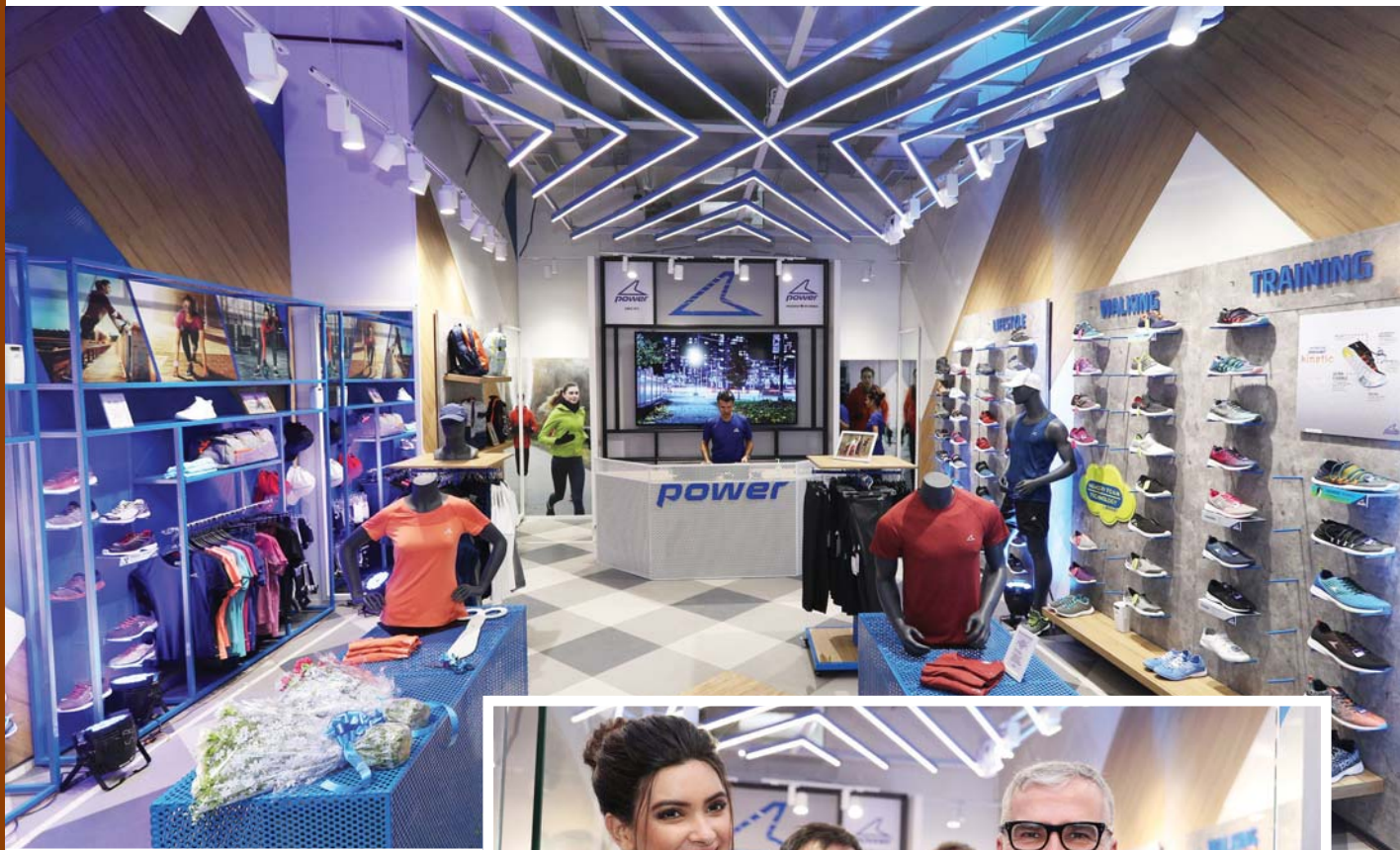
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POWER



Global CEO, Alexis Nasard & Bollywood Actor, Diana Penty inaugurate first-ever Power store in NCR Region

Collection

Power's newest range, XO Rise (running shoes with 25% more rebound) and Glide Vapour (sock-fit light-weight walking shoes with memory foam) are some of the new and exciting collections available at the store. In addition, its apparel comes with unique technologies like Activent (mesh area for breakthrough breathability), pWick (wickable fabric for moisture management) and pSoft (natural cotton for casual comfort) to give comfort and style during fitness routines.

Store Theme

The spacious high-tech store, will cater to the increasing demand for active lifestyle with a range of shoes, apparel, bags, and accessories.

Store Interiors

The brand has created a new-age, high-tech retail experience. The store has six high-tech merchandise display walls with a large LED panel and blue LED lights that lend an attractive yet clean and minimal look to the store.

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Power

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WOODLAND

Collection:

Woodland offers a wide product range, which includes apparels, shoes and accessories for men and women, and outdoor equipment like tents, sleeping bags and waterproof outdoor backpacks.

Store Theme:

The new store concept and these store launches add to our brand's repertoire of pro-planet philosophy featuring eco friendly elements like use of recycled wood, LED energy saving lighting amongst others with a warm colour palette. Known for the positive values, the brand facilitates the same into the fresh designs in our new format stores too. With astounding results, the stores look stunning, displaying a beautiful mix of ethos and product.

Store Interiors:

The stores showcase new format interiors in line with their eco-conscious philosophy. The new store design is an innovative, thoroughly modern, dynamic retail environment that reflects the brand's aesthetic, its commitment to craft and its ties to the English landscape. Featuring rugged roots amalgamated with environment friendly elements, the stores echoes the brand's USPs in an all-new avatar reflecting a younger and trendier vibe.

BRAND:
Woodland

PROMOTER:
Aero Group

LOCATION:
Delhi NCR (Noida, DLF Mall of India & Great India Place)

SIZE OF THE STORE:
2,000 sq.ft. (DLF Mall of India)
2,800 sq.ft. (Great India Place)





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ANITA DONGRE FOUNDATION LAUNCHES PRODUCTION UNIT IN JAWHAR FOR

WOMEN EMPOWERMENT

By Tanya Krishna

Designer Anita Dongre has time and again proved herself and so have her brands in India as well as overseas. She has been in news for dressing some of the world's first ladies on state visits to India - Kate Middleton, Queen Mathilde of Belgium and most recently, Sophie Gregoire Trudeau. While the spotlight is always there around her glamorous successes, she has also come in the forefront for a social cause. The Anita Dongre Foundation has set up a production unit in Jawhar (Maharashtra) to train women in tailoring and to create local employment for women. Jawhar is the second livelihood project by the Anita Dongre Foundation after its success in Charoti, Maharashtra. The poverty levels in Jawhar due to dwindling agricultural produce and limited urbanisation have resulted in alarming cases of malnutrition and infant deaths. The project currently provides employment to 70 women working on 50 machines. This number is set to double within the year to create livelihoods for 120 women on 100 machines. Images BoF talks to Sangita Rohira, President - Sourcing & Production, House of Anita Dongre, about the project.

Tell us about Anita Dongre Foundation and its inception.

Sangita Rohira (SR): The Anita Dongre Foundation was set up in November 2015 with the aim to empower women, especially in rural India by taking jobs back to them and making villages independent economic centres. Anita Dongre has always believed in empowering



ANITA DONGRE FOUNDATION AIMS TO EMPOWER WOMEN IN RURAL AREAS BY PROVIDING THEM JOBS AND MAKING VILLAGES INDEPENDENT ECONOMIC CENTRES. ANITA DONGRE HAS ALWAYS BELIEVED IN EMPOWERING WOMEN IN VILLAGES BY GIVING THEM A SUSTAINABLE LIVELIHOOD.

women in villages by giving them a sustainable livelihood. With this ideology, the House of Anita Dongre, has decided to adopt villages which not only give women a platform to be self-sufficient but also help the brand and the country move forward.

The foundation has set up a production unit in Jawhar town of Maharashtra. Why did you choose Jawhar for this unit? How will it help this town?

SR: Jawhar, 140 kms away from Mumbai in the Palghar district of Maharashtra, is a tribal village where agriculture is the only source of income. We had found that few women were skilled in basic stitching but due to lack of opportunities in the village, they had no source of income. The Anita Dongre Foundation decided to adopt the village to create employment for these women and to give them a platform to be self-sufficient. In Jawhar, this effort has involved training women right from scratch in the art of sewing, ironing, pattern cutting and so on to ensure economic independence through an accessible and dependable source of income. Apart from training these women, the project also provides a travel stipend to maintain a comfortable and stress free work environment.

Tell us about the composition of this production unit.

SR: The project currently provides employment to 60 females working on 50 machines in a 3,000 sq.ft., space. We aim to double this to 120 females and 100 machines.

What kind of training will the foundation offer to the women of Jawhar?

SR: The House of Anita Dongre in collaboration with Nagarparishad and Pavneet Kaur, Deputy Collector of Jawhar, inaugurated the craft

centre, where the women are being taught a variety of garment making techniques. They are getting trained in cutting, sewing, ironing, packing and quality checking (end-to-end garment manufacturing). Post the training, Global Desi brand from House of Anita Dongre will showcase the products made by these women, with special tags and they will be paid on per piece basis. This tag allows empowered women in urban India to consciously choose to contribute to an effort to empower women from smaller villages.

What are the other projects successfully undertaken and improvised by the foundation.

SR: Besides Jawhar, the Anita Dongre Foundation has also adopted a village called Charoti, 125 kms away from Mumbai where the women are trained in end-to-end garment manufacturing for brands Global Desi and AND.

How important, do you think, is women's financial independence for country's socio-economic progress?

SR: Anita Dongre was born in a traditional Indian family where women were only homemakers and did not have professional careers. She had to overcome the family's resistance initially but once they showed their support, there was no looking back. She truly believes that today's Indian women are on a brink of a revolution and they can do anything if they set their mind to it. She also feels that no nation can rise to the height of glory unless its women are walking side by side with their male counterparts.

What are the future plans of Anita Dongre Foundation? Will we see more of such units in towns like Jawhar? What are the other areas in radar for the near future?

SR: We definitely plan to expand and adopt more villages in Maharashtra and create more employment opportunities for the women of the nation.



REVIEW OF THE **INDIAN DENIM MARKET**

ITS CHALLENGES & KEY OPPORTUNITIES

By Kavindra Mishra,
Managing Director, Pepe Jeans India Ltd.

India is the fifth largest destination in the global retail space, making the Indian apparel industry the second largest contributor in the retail industry. Basis industry statistics, denim is the single most leading segment in the fashion industry.

Retail market's progression over the years

Somewhere in the mid-nineties, the apparel industry in India began to get more organised. During this time there was a radical shift in fashion and men became more experimental with their choices. Denims became the garment of choice for urban Indians - both men and women. Today the Indian denim fashion industry is at an exciting place - with huge growth opportunities ahead. There is a strong and technically sound production base that has evolved through the export base of garment manufacturers. The design sensibility of Indian brands is at par with international brands. The ability to produce well-designed denims at affordable prices is the strength and forte of Indian brands. They can exploit the opportunity to position themselves in the middle of the





women and men pair denim with ethnic wear or kurtas. This mix and match trend has picked up very well in the recent years and fuelled the growth of denims in these areas.

New-gen denim

With the influx of decorated denim in the last two seasons, it's no surprise that the trend has made its way from jeans to jackets. Internationally denim customisation has taken hold of every cuff, collar and back pocket worth its grommet and buttonhole. From monograms to embroidered patches to eye-catching pins, putting your own personal spin on the likes of jeans and jackets is more fashionable than ever. It's the type of trend that is unique to the individual – and increasingly popular among social media influencers looking to show off their cool customisations. For a customer, it's about creativity and personalisation – about creating a bespoke piece. For a brand it's about giving the customer a unique and one-of-its-kind experience. Adding a personal touch makes otherwise ordinary pieces uniquely your own.

Pepe Jeans was the first to introduce the denim customisation service in India back in October, 2015. Pepe Jeans Custom Studio service enables customers to step into the design seat and customise their denim in a few easy steps. The process is very simple and is widely appreciated by our customers. In four easy steps, the customisation process can be done according to what one wants to create on their denims. First, pick a laser print to be tattooed on the denim. Next choose the fastenings – be it buttons, rivets or tacks. Then select the brush of the garment and where exactly you want it. Lastly, choose the colours you want your print to be in.

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“Pepe Jeans Custom Studio service enables customers to step into the design seat and customize their denim in a few easy steps. The process is very simple and is widely appreciated by our customers. In four easy steps, the customization process can be done according to what one wants to create on their denims.”

-Kavindra Mishra,

Managing Director, Pepe Jeans India Limited

consumption pyramid and span across all metros, tier -I, -II and even -III towns to gain scale, while premium brand continue to struggle with this.

Organised retailing in India has undergone immense growth in the last decade owing to growing consumer aspirations, favourable demographics 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. Urban India has an increased purchasing capacity as well as awareness of fashion trends thereby providing a huge market to denim players in the country. This further indicates preference towards purchasing premium and quality products. This has led to deeper penetration of foreign brand and the popularity of private labels.

In recent years, India has also seen the entry of various new players in the retail market. This has led to awareness and an increasing sense of global fashion. Denim is considered as one of the most versatile fabrics, whether it's casual wear, or everyday use; denims are also accepted as work wear on Fridays which are casual days for most companies. Even in smaller towns,

The idea behind Custom Studio is to empower the customer with the opportunity for personalisation; and therein lies a powerful tool that will revolutionise denim fashion in India. Fashion and customisation go hand in hand. This value added service helps in retaining your current customers and also helps in acquiring new customers.

We conducted three events to celebrate the launch of Custom Studio which enabled key influencers to experience this innovative concept. The first experiential took place at Delhi's Connaught Place. We invited top lifestyle magazines and the country's top fashion bloggers for an exclusive first hand experience. Fashion editorial teams were seen designing their own denims and tweeting and posting pictures of their experience across social media. The bloggers created much excitement through conversations on their social media platforms through posts and stories on how much they enjoyed participating in this unique concept.

The second experiential was conducted in Mumbai's Linking Road, Pepe Jeans store. The third experiential was recently held in Bengaluru's Indira Nagar Store. Top bloggers and influencers from the city's fashion fraternity were in attendance. This event witnessed astounding social buzz. In over 2 days, 25 bloggers designed over 30 pieces of denims that ranged from cool florals to monograms and song lyrics. The activity generated over 30,000 likes and over 2,000 impressions in the same time period.



Since the launch of the Custom Studio, the store has witnessed adults and kids alike, enthusiastically personalising their denims. The cost for the custom studio services are ₹250 for each service—laser, colour, rip and tear, and adding embellishments.

Looking at Custom Studio from a strategic perspective, our objective was to rebuild relationships with consumers by adding a touch of personalisation and drive them to the stores. We wanted to reinvent how denims were being sold. Customers are genuinely excited to choose their own design and personalise their denims. We saw that 3 out of 10 customers who purchased denims used the Pepe Jeans customisation service.

Currently, the Indian target audience is almost on par with the global consumers. They are a lot more

evolved with their shopping choices; and are constantly seeking novelty in experiences. We have to be ahead of the curve in understanding the new generation consumers.

The Digital Way

Taking into account the digitisation, India's e-commerce market is expected to cross USD 800 billion, according to industry reports. The online space is growing at par with physical stores now; as brands are amping up their strategies to ensure an omni-channel business. This will help to acquire new consumers as well as retain their existing market share. What makes this market promising is the heavy investments and rapid increase of internet users.





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This internet penetration is not only seen in urban areas but also in emerging markets. Organised players can now get a hold in these markets through this medium. It is important to also consider the buying behaviour of consumers in small towns which is different compared to consumers living in the urban areas. They seek value; they have an affinity towards local culture, and are more conservative in their choices. Also in the last 2 years, the delivery reach and speed in these areas has also picked up making it an ideal time to target additional customers with the help of e-commerce partners.

While e-commerce expands your reach and customer base, another factor to consider is the influence of social media and its huge impact on the apparel industry. The internet has given social media the reach, which wasn't possible 10 years ago. Fashion in the age of millennial and social media

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is different - influencers and bloggers are the new trend-setters.

Facing Challenges

While there have been several factors that have contributed to the denim market's continued success, there has also been a plethora of challenges that showcase how this market is also susceptible to volatility.

The new age millennials and this generation of shoppers are starting to view clothes as an extension and expression of their lifestyles. These consumers are also increasingly travelling and shopping abroad. Attitude shifts have further led to change in purchase patterns, because of the increase in disposable income. In the last 5 years, the retail landscape has changed dramatically. Buying behaviour is rapidly changing and forcing retailers to conform to the new age of shopping. Brands need to

IN OVER 2 DAYS, 25 BLOGGERS DESIGNED OVER 30 PIECES OF DENIMS THAT RANGED FROM COOL FLORALS TO MONOGRAMS AND SONG LYRICS. THE ACTIVITY GENERATED OVER 30,000 LIKES AND OVER 2,000 IMPRESSIONS IN THE SAME TIME PERIOD.

up their game when it comes to the cluttered market of retailers prying for customer attention and also plan effective retention programs. Further the increase in operational cost, changing real estate prices, heavy discounting during sales are additional challenges for retailers.

Conclusion

There has never been a better time for the retail industry, the denim industry specifically as there is huge growth year on year. A plethora of factors like India's growing economy coupled with rising incomes and urbanisation have resulted in the continued success of the denim industry. There are several components; brands will have to consider is leveraging this growth in the current market scenario. Product innovations, pricing and consumer preferences will be in the forefront when curating new collections. The future of denim will also depend on how brands will build their omnichannel strategy and its technology through which they can tap additional customers.



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THE EVOLVING INDIAN LUXURY MARKET

India every year is a growth story, despite complaints and gripes, the market grows! In the past 5 years, India has seen the beginning of a new cultural emergence from the perspective of retailers, manufacturers and the customer and consumer. The span 2017-2020 appears to be the decade quarter of evolution. There are number of small yet critical factors which clearly demonstrate the decade quarter of evolution that has continued in India and more importantly the way the luxury fashion market is developing on a fiscal and cultural prospective.

There was a time when purchases in fashion were either need based or one off aspirational purchases. As we have seen, especially since 2015, fashion purchases have evolved to a more desire and aspiration based activity. Across the luxury pyramid 4 categories are seen as more than a basic need. The items worn reflect the consumer's personality, and is perceived by them as a status symbols. With the growth of international influence and more correctly put, the emergence of a pan-global target audience, each brand, regardless of its tier, price and country of manufacturing, represents an aspirational value.

Its not just international brands we are referring to, the growing demand and redefined allocation of flexible income towards fashion, along with the newly restored pride in 'Made in India', has opened the doors for domestic brands today. With three of the largest department stores launching their own private labels, while not all are a luxury to the better travelled among us, nearly 28 percent of retail clothing sales from structured retail today comes from the department store segment including Shoppers Stop, Pantaloons and Westside among others. These department stores have effectively

The new Indian consumer is eager and open to new brands that are ultra fashionable, globally noted and promise to lend him a social status. This new generation disposition is fuelling the luxury fashion market in India to bloom further by the day.

By Rahul Kapoor, Co-Founder, Excedo Luxuria



who want a shirt from a brand which is different and cares as much about the process and the end creation as much as the consumer does about the taste of the food they eat.



offered home grown alternatives to international high street fashion brands such as Zara and H&M. With Westside planning to expand beyond Indian borders, the coming years could very well give a much needed impetus to manufacturing in India.

The currency advantages, higher quality of manufacturing and lower manufacturing costs in India, provide a key advantage to all brands that are manufacturing in India and selling globally today.

KK Shirts launched in 2014, is a small outfit selling a limited run of 1,000 shirts globally every year, proudly 'Made in India', matching the quality of ready-to-wear shirts provided by far more established European brands. The shirts are priced modestly between ₹6,000 to ₹18,000 (45 GBP to 200 GBP) whereas a big boxed store would sell a similar quality and care for at least 2.5x, using sustainable textiles and environmentally friendly dyes and prints. The brand, in 2017, was sold out of all its shirts in a record 8 months period. It's surprisingly good for a brand which neither banks on social media nor advertises, but just relies on the word-of-mouth from its customers and targets consumers

International brand launches are not to be left behind, while we have H&M open up across the country in the premium affordable market, we have also seen brands such as Ted Baker, which back in London, is a common department store and non-luxurious brand, in India's newest luxury mall, The Chanakaya. Ironically ultra luxury or haute luxury niche shoe brand, EL Chaussure decided that malls in India are not yet luxurious enough to match their other stockists such as Harrods in London and chose to continue to offer their designed-to-desire shoe service online and through a partnership with Excedo Luxuria in India. They allow customers to design and order their own shoes online and then have them hand made by craftsman in Great Britain, Italy and Spain.

The latest launches clearly show the consumer and customer of today is ever willing to look at newer brands and they are open to new brands, both international and domestic, which can provide value for money (that's different from being cheap), support in defining a social status, is globally appealing and most importantly, is fashionable and in season.

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With the increase of foreign investment as well as local investment, local businesses infrastructure continues to develop driving down the mid-term cost of operations, logistics and even top level manufacturing costs.

Given the glocal opportunity, e-commerce shopping continues to grow specifically when looking at the omni-channel strategy. Investments in retail will continue largely focused on providing the customer an unbeatable personalised customer service. It was estimated that 2,00,000 crores was invested in retail in 2016 and by 2020 its expected to double. With core and inter-market consolidation such as Reliance Brands' acquisition of 40 percent of Genesis Luxury, it is making way for the original founders to pursue wider opportunities and growth, and giving Reliance the 'influence' to align benefits and market strategies.

With investments being made in retail, we can expect the contribution of tier -II and -III cities' towards total luxury fashion spending increase, though in our experience, many key buyers are driven by the psychology of buying the best and buying better than those in the metropolitan cities, a higher status symbol and far better value for money. This mind set gives way to a list of haute luxury brands such as Swiss Luxury, Laurent Ferrier, along with higher end industrial luxury brands such as Kiton, a luxury made-to-measure clothing from Italy. These niche labels entice new customers and educate them in their own brands' prospectives; without them being over exposed to Massitige and mass luxury fashion brands advertising such as Louis Vuitton or Christian Dior.



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The least obvious but one of the most critical evolutionary points, is the definition of luxury fashion. Fashion, till recently, was limited largely to clothes and immediate clothing accessories. As time progressed, categories such as shoes, jewellery, watches and accessories have been included, in the truest term. Today, the luxury fashion market includes a full wardrobe from innerwear to watches like Versace or the more niche Lytt Labs. With a variety of options and each design bearing in mind the modern day buyers' wardrobe, lifestyle and functionality; the interchangeable straps on a Lytt Labs represents this exact mindset, with over 300 different

straps available, from black leather to green, red and blue tartan, all changeable within a minute at home.

Overall, the immense growth charted for the luxury fashion segment in India is nothing short of exciting; but with all enticing opportunities come challenges. There are not insurmountable challenges though. Consolidation is a wise move and I would expect to see further mergers and some inter-market investments reducing the competition domestically and increasing competition for international brands, providing the end customer and consumer with better service.



ABOUT RAHUL KAPOOR

Born in Kent (England), Rahul Kapoor is the co-founder of Excedo Luxuria that specialises in bespoke and haute luxury labels. With the luxury market as his forte, Kapoor curates and retails niche luxury brands in India, that are sourced from Europe and North America. An international entrepreneur, he has been a recipient of numerous prestigious entrepreneurial and business elite awards.



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THE INNER WEAR BRAND MARATHON

The man's innerwear section has witnessed tremendous traction and metamorphosis in the last few decades. Today, the inner wear marathon is expected to unleash a new fervour and new era of retail space competition.

By Nishchal Puri, MD, Horizon Consulting India

Very few consumer categories over the last decade have witnessed monumental action and path defining changes. Very few consumer categories over the last decade have seen eruption of contenders and challengers who have changed the rules for the existing incumbents. Very few consumer categories have witnessed leviathan scale of category re-segmentation and new rules of branding and retailing.

One major product category that perfectly reflects this dynamics is indeed the mobile handset market. Pegged at ₹1.36 lakh crore in 2016, the category continues to grow at 13.7 percent and ensures new entrants re-defining the consumer choices and market dynamics. Mobile handset players are witnessing change of their fortunes by every quarter. New brand launches are re-writing the consumer preferences, and even the top player is finding its market share witnessing changes every quarter. A category that perhaps has the same level of entropy and the same level of action is the men inner wear. The category is pegged at ₹13,500 crores in 2018 and has witnessed a 13.7 percent growth over last year.

The decades of the 70s and 80s for the men's inner wear were the evolving decades, while the manufacturers were beginning to use the logos and consistent names which eventually evolved them as inner wear brands. The consumers were still to give any serious consideration on the type or name of the inner wear, very true to the functional category. The product was to deliver certain deliverables and that was it. Nothing more and nothing less was expected.

The decade of the 90's was about **unleashing of the consumer power** in the Indian economy which influenced the men's inner wear segment also. The manufacturer labels were now seriously evolving into brands, mass communication was being engaged and price as a function to buy was slowly but surely losing its grip. If 90's could be regarded as the beginning of the forming of the exponential curve then the 2000s can surely be regarded as the breakthrough decade. Indian inner wear segment witnessed some serious consolidation and global players got interested in the category. The segment is being subjected to horizon redefining and landscape evolving changes recently. The category that had found equilibrium earlier with different brands settling in different price point brackets of economy: middle, premium and higher premium, is now at the threshold of another vital change. A change that is expected to redefine the category in the next decade. The men's inner wear marathon in its true sense has begun now and the brands that have some advantages might find it difficult to hold their post in the times to come.

The significant change the category is observing is the spurt of licence

deals, arrangements where the existing incumbents are aggressively shopping for brands and are initiating brand licence deals. A trend which was restricted to very few in the earlier decades is now becoming the norm.

Be it Hanes, FCUK, Fruit of the loom, Pepe, CK or Ed hardy besides many more all these brands have finally decided not to go solo and have teamed up with a strong partner.

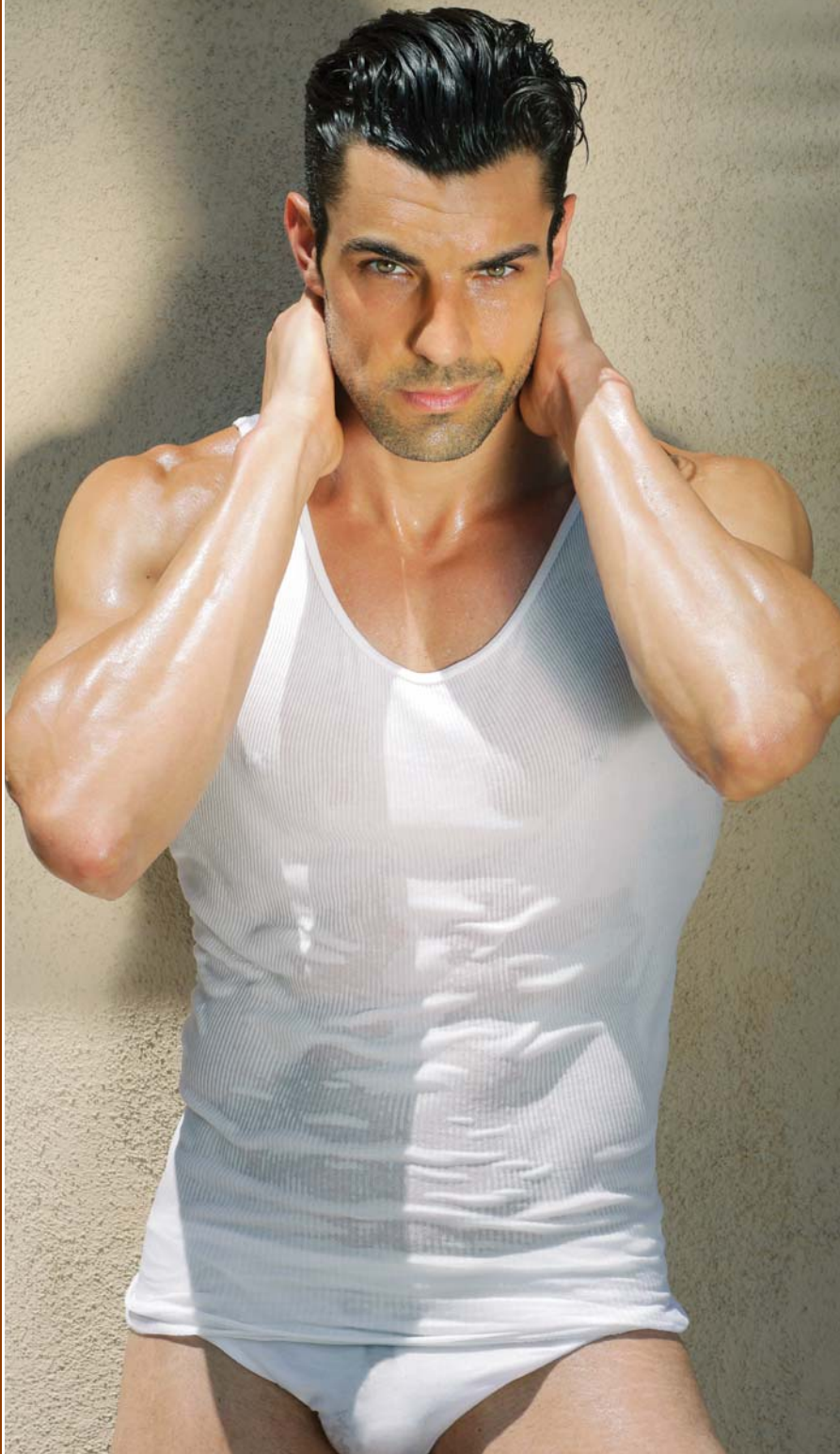
This new trend that was restricted to Jockey and Levis in the earlier decades has found the fancy of many corporates and brands. In my opinion, the brands have realised that to crack the inner wear market code its imperative to go with a partner who has precedence of having deciphered the code earlier for their brands. The arrival of strategic relationships and symbiotic synergization of the competencies amongst corporates and brands is indeed a welcome change.

The inner wear segment has over the years been operated as fiefdom, the stronger brands were successful in thwarting the entry and establishment of new upcoming brands. The new brands were facing difficulty in perfecting the value chain and by the time they were close to arriving at the break even, the earlier mounted losses disabled them to invest further. In light of the new developments it is expected, that the cohabitation will ensure that the brand gets best of both the worlds, the brand pull, coupled with the operational expertise of the partner.

The consumers have been deprived over the years of innovation and

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THE INNER WEAR MARATHON WITH MANY NEW INCUMBENTS WILL ALSO ENSURE UNLEASHING OF MANY OPPORTUNITIES. THE DISTRIBUTOR FRATERNITY HAS BEEN ON A LOOKOUT FOR OPPORTUNITIES THAT CAN HELP TO GROW THEIR BUSINESS. IT IS EXPECTED THAT WITH MULTIPLE BRANDS RE-ENTERING THE MARKET THE OPPORTUNITIES FOR THE DISTRIBUTORS WILL ALSO WIDEN.

technically superior products. The category had become a bastion of the few and the strong brands that were enjoying the monopolistic supremacy, eventually the consumers were left with no power of choice. Monopoly in any category and in any segment ensures that the consumers end up getting a raw deal. The supremacy of some of the brands in the middle and premium segment had reached unhealthy levels. The retailers and the consumers have been clamouring for new incumbents. The new trend is indeed a strong ray of hope that the category will be freed from the vulture like claws of the monopolistic players. We expect substantial democracy to return in the segment with the consumers and the retailers getting enough choice and more product styles and types.

The inner wear marathon with many new incumbents will also ensure unleashing of many opportunities.

The distributor fraternity has been on a lookout for opportunities that can help to grow their business. It is expected that with multiple brands reentering the market the opportunities for the distributors will also widen. Indian hosiery industry has more than 8000 distributors engaged in ensuring that the brands reach the Indian diaspora. New opportunities are expected to attract new business houses also to try their hand in inner wear distribution.

Manpower Expansion

Inner wear category has over the years suffered with inability to attract better talent. While the economy segment brands never relied on the skilled manpower, the middle and premium segment brands were to satisfy themselves with the extremely limited talent pool. With the new emerging trend taking concrete shape, it is expected that the manpower from other

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THE MEN'S INNER WEAR SEGMENT IS AT THE THRESHOLD OF THE NEW REALITY AND IT WILL BE EXTREMELY INTERESTING TO SEE THE SHIFT IN THE MARKET SHARE. ALL IN ALL THE RACE FOR DOMINATION WILL INTENSIFY AND WILL ALSO ENSURE THAT THE EXISTING PLAYERS GET AN AWAKENING CALL.



related industries will get attracted to the inner wear category and will also enhance the knowledge base and inclusion of FMCG like distribution and retail management systems and practices. The brands will have to devise their own sales and marketing strategies to ensure that they do not become replicas and that the sales practices are unique and not inspired from other incumbents.

The inner wear marathon will also unleash a new fervour and new era of retail space competition. As the retail space is finite, the battle for the same will intensify in the years to come. It is expected that newer innovative retail cajoling schemes will be launched ensuring the retailer is wooed and well taken care of.

All in all the race for domination will intensify and will also ensure that the existing players get an awakening call. The men's inner wear segment is at the threshold of the new reality and it will be extremely interesting to see the shift in the market share.

The action in the ₹16,000 crores women's inner wear segment is more somber though. The category is still to witness a consolidator. The highly fragmented women's inner wear market is slow to adopt to change and equally slow to welcome new players. While brands like Amante and Bwitch did attempt to become stronger players, success has eluded them. The lingerie landscape is perhaps more rocky with high friction in comparisons to men's inner wear. The consumer is very slow to evolve and is simply not convinced to divorce its price sensitivity. The glory seems to be still in the economy end of the market while the premium segment is more of a black hole. Women's inner wear market will perhaps take another decade and more concentrated efforts by the players in terms of perfecting the price, quality and distribution reach equation.

Perhaps one of the reason for slower pace of consolidation in the women's inner wear market vis a vis the men's inner wear market is the frugal marketing spends that the players have engaged in. Women's inner wear brands have remained pygmies and the ever prevalent unorganised market has ensured price to availability equilibrium not leaving enough gap in consumer need satisfaction. It would need a more aggressive player determined to invest heavily in marketing and prepared to take beating in the bottom line for some years before a consolidator can emerge.

The men's inner wear marathon has begun and this time the rules and players are different. The race to grow market share will only become more competitive and a new Samsung, Redmi, Xiaomi is expected to emerge soon.

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TREND FORECASTING: BEHIND THE SCENES!



- David Shah,
Publisher, Metropolitan Publishing BV

Veteran marketing scholar David R Shah elucidates the concept of trends and what it takes to get an insight into what the next emerging trend may be and show the direction and potential reaction of consumer culture.

IBoF: Tell us about your background. When and how did you enter the world of textiles?

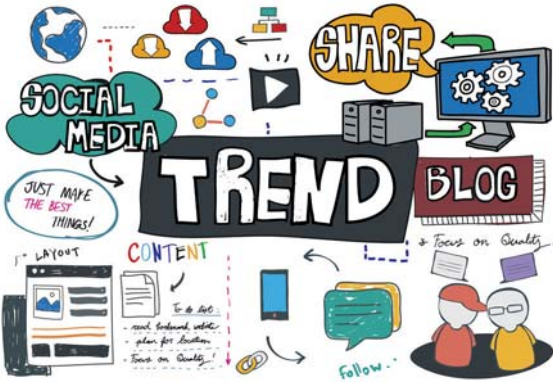
David Shah (DS): I never understood how I ended up in the world of textiles. I studied Classics (Latin and Greek) at university and wanted to specialise in Roman Military History and do a PhD on the Praetorian Guard (the bad boys in in the film *Gladiator*). To be honest, I came into textiles via Courtaulds, once a synthetic fibre giant along with ICI, Rhone Poulenc, Montefibre – all names from the past. I was part of the graduate entry annual intake in the early 1970s. When I joined Courtaulds, I thought I was joining the art institute (Courtaulds Art Institute) as a keeper but quickly learnt otherwise.

IBoF: Why and how did you become a trend forecaster?

DS: I have been called all kinds of things by people from guru to futurist. Honestly, that's quite absurd really, because I have never pretended to be anything other than a feet-on-the-ground observer of textile and consumer movements.

My first entry into textiles was via the carpet sector but I changed career track into journalism where I somehow started to specialise in textile economics and fabric trends via International Textiles, where I was Editor-in-Chief during the period 1982-87. It was a very exciting time, I tell you! Everyone takes trend information for granted now, but believe me, when I went to the Interstoff Textile shows in Frankfurt in the early 1970s, trend forums and the like had not even been thought of. Back in the day, you did everything by feeling and personal taste. The trend information that we now take for granted was spearheaded by American report services like Here and There in the late 1960s supplying local US buyers with information about what was going on in the fashion capitals of Europe. Very soon, a slew of European services followed – CIM (Nelly Rodi and Li Edelkoort), Promostyle, Nigel French, etc. In fact, one of the reasons *Première Vision* became the success it did was because it was the first to present fabric trends as part of its exhibition service.





design, branding and lifestyle trends. It has been a pretty eventful journey!

IBoF: Could you tell us why is it important to work with trends?

DS: Like I told you, when I started off in textiles, there were no trends. It was a market area that developed as I grew more and more into the textile world via journalism and niche publishing. In the beginning, the importance of trend spotting lay simply in giving people (designers, buyers, manufacturers) information on what to produce and what to see. You were pointing the way, helping them to navigate all the roads in the confusing world of fashion. This evolved from pure fashion advice like shape, colour and fabric into marketing strategy, brand behaviour and consumer lifestyle analysis. Later, the trend package even came to include advice on production locations. And then came the Internet!



Now, the point of spotting trends has completely changed. There are those who say we are living in a 'post trend' era, based around an individualistic and self-determining consumer choosing from an endless array of options, living in an internet world with 60,000 fashion bloggers seeking her attention and high street retailers rotating merchandise every 14 days. Today, it seems its social media and not traditional forecasting houses that dictates trends today and decides colours and materials two years in advance.

I realised, then and there, that this was the only way to present textiles and was lucky enough to work with the likes of Nelly Rodi, Li Edelkoort and Première Vision. This approach was instrumental in turning International Textiles into the leading fabric magazine of the mid-1980s. Eventually, I developed this approach still further when I started my own B2B publishing house with Textile View, Interior View and View on Colour (with Li Edelkoort and Anton Beek).

Also, I do not agree with all this 'end of trends' talk. For me, the point of trend spotting today is to offer clarity and to strip away the peripheral and the 'stuffocation'. Designers know everything already. What they need is not more information but confirmation. Am I doing the right thing? Am I making the right choices? etc.

As a publisher, I was asked to speak at a lot of conventions and seminars. I discovered that, sometimes, it could be more exciting to talk about lifestyle, human behaviour and consumers rather than pure fashion trends. In fact, it is actually best to try and combine the two, which I realise now. Anyway, that was when I launched Viewpoint, my magazine that specialises in

The fashion industry might be thinking in 'post trend' and 'new individualism' terms but that does not mean the whole



industry is following. There are major manufacturing sectors that need to think four or five years ahead (two years creative + two years marketing planning etc.) and they need all the information they can find. To find reliable forecast information, they often end up creating their own trends, i.e. the movie and entertainment business, the automotive industry, high-end cosmetics and perfumes, and last but not least, gastronomy.

IBoF: Very interesting! So, how do you define the concept of a trend?

DS: Actually, I have never really liked the word 'trend'. Personally, I prefer terms like 'direction'. What is important is to separate the final acknowledgement or arrival of a trend from the process of trends, i.e. where does it start, how does it travel, and where does it end. Whenever a trend starts, it commences life as a tiny embryo and takes two years or more of gestation and momentum before it becomes mainstream. But remember, once it is in Selfridges and for lifestyle magazines, the trend has already happened, it is two years too late. You find trends in the periphery and not in the established centre. As the visionary Steven van der Kruit, a marketer and forecaster in the fragrance business, puts it, "A trend is the result of fundamental change (not a fad) that ends up influencing global business and consumer life."

IBoF: What types of trends interest you the most?

DS: Since everyone knows that publishing never makes you rich, I have been a design consultant in the clothing business since 1988. Meeting and talking to the biggest designers and retailers in Europe has given me a

serious understanding of what people really need to know, "Should I do black or should I do white?" etc.

This is the kind of stuff that interests me and I make serious efforts to give 'a reason why' – a logical sales pitch they can sell on to their management and their staff.

IBoF: It is widely known that a forecaster needs to be abreast with all aspects of culture from creative arts, media and travel to underground subculture movements. How and where do you discover trends?

DS: There is, in my honest opinion, a lot of smoke and mirrors about the concept of trends and forecasting. Of course, there is a question of the guru aspect about it but there is also a lot of common sense and logic to it.

First, there are mega factors. In the early 1990s, we were talking 'Eco' for the first time in a big way, which led us to the green decade. Now, we are in a time of blue – this is because water is the new global concern. They say grey is the colour of the current decade but I say it is black and white because of the changing balance of East and West, Ying and Yang. It could also be pastels because ageing populations and health will soon be our next major concern.

Next comes the metropolis factor – what is happening in the great capitals of the world – London, New York, Tokyo and six or seven other big cities. But, as stated above in my definition on 'trend concepts', the new and embryonic does not start in Harrods but East London, not Madison Avenue but Brooklyn with the small florists, skateboard designs, and graffitiists.



Then there is the influence of cycles. Cycles are eternal truth; things always come back. The secret is to understand the timing and how to update the concept to really make it relevant to the present. There are also cultural influences – art exhibitions, events, films etc. But, when it all comes down to it, the truth is very simple—the biggest catalyst in trends – colour or any sort – is the power and authority to deliver. Everyone has the ability to think of an idea but if you cannot present your concept or convince others, then no one is going to believe you. You need to be present at influential colour meetings and promote your beliefs. You need to be like Zara with over 600 shop windows to show your ideas to the world.

On a personal note, I travel over 300 days a year (there is no education like travelling) and I read constantly (especially financial based magazines and newspapers). Actually, my secret is to look at adverts. The 'Mad Men' of today are much cleverer buggers than me.

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ABOUT DAVID R SHAH

David R Shah is the publisher of Textile View, View2, Viewpoint, Pantoneview, Colour Planner and Textile View VIFF China. In the past, Shah was the co-publisher at United Publishers S.A. Paris (View on Colour). He also been a visiting professor at the Royal College of Arts and has taught textiles, fashion and marketing in London. He is currently the associate professor at Artez, Arnhem, the Netherlands.



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FASHIONING A GREAT CONNECTION

MAPPING INDIA'S SUCCESS AS A FASHION DESTINATION AND THE FUTURE DIRECTION

By Abhishek Bansal, Executive Director, Pacific Group

Fashion, according to most dictionaries, is described as the latest style of clothing, hair, decoration, or behaviour. I feel it goes deeper than that. Fashion speaks to the core human desire to be a part of something larger, of belonging to a community. This is why global fashion has maintained a steady growth over the last decade and a half, even in the face of several large-scale market challenges that crippled many other industries; the sector was estimated to be worth upwards \$2.4 trillion in McKinsey's 2017 The State of Fashion report, with the apparel and footwear market accounting for \$1.7 trillion. This is why fashion destinations like Paris, London, New York, and Milan continue to attract millions of customers from the world over, and why haute couture showcases like the Paris Fashion Week remain important events on the fashion calendars of fashionistas and celebrities.

India, as a growing hub for high-end fashion, is beginning to mark its own presence on the global stage. The domestic demand for textile and clothing is expected to cross \$141 million by the end of this decade. Many leading global fashion brands are now expanding their operations in the country to tap into this



burgeoning market of fashion, apparel, footwear, and clothing in the country with highly-personalised offerings. Every step of the way, they are being given tough competition by Indian brands, which marry western forms and attire with indigenous designs and aesthetics to cater to the couture needs of the Indian customer.

But, with technological advancements and changing market dynamics rapidly redefining consumer behaviour, how will the future of fashion in India pan out? Finding the answer to this question requires us to understand its history as an industry in India, as well as the evolving relationships within and outside the industry, the retail ecosystem, and current trends.

Fashion in India: The history and the evolution

Given the country's position as a prominent centre and market along the Silk Route, it is hardly surprising that India has been a distinctively fashionable country since time immemorial. Instances of kings and queens, princes and princesses, noblemen and noblewomen wearing decorative clothing like lavish turbans, elegant dhotis, silk sarees, churidars, embroidered jamas, and salwar-kameez abound in many historical reports and accounts. We have even heard many apocryphal anecdotes of courtroom intrigues, most prominently those from the Mughal era, of courtiers and noblemen trying to gain more influence within the court by bedecking



themselves in the most resplendent clothing. Independent artisans of all kinds thrived and flourished across the country throughout the ancient and medieval times, giving rise to distinctive techniques and stylistic flourishes.

This trend continued well into the British Raj; British personnel and their families often ended up inadvertently competing with the local nobility at social gatherings on the fashion statement they chose to endorse. Despite this, the concept of fashion, as it was in the west, didn't really take off in India till after the country's independence. Even then, the fashion sensibilities for a large section of the Indian population were informed by popular culture media like cinema and television. Bollywood played a major role in popularising fashion trends across the country. Consumers looked at and emulated the couture worn

by their favourite movie stars in the most recent movies. Just look at how Madhubala's iconic style statement as Anarkali in the 1960 cult classic Mughal-e-Azam became all the rage across India, and continues to be popular under the moniker of that beautifully tragic character.

In fact, it was not until 1966, when Ritu Kumar established her first boutique in New Delhi, that the country got its first real taste of high-end fashion. The legendary designer, who had been exposed to western fashion sensibilities during her time abroad, played a pivotal role in ushering in a new era for fashion in India by combining western designs and styles with traditional Indian artisanal techniques. This led to a large-scale revival of several indigenous textile printing techniques



such as Zardozi, ikat, bandhani, patola, chikan, and shisha. As more and more players in the domain started to experiment with this mixing and matching of Western and Indian attire, fusion fashion became a thing. It wasn't uncommon to see kurtas being worn with jeans and trousers.

The big break for fashion in India, however, came in the 80s and the 90s. With the government pushing towards opening the Indian economy to foreign investment, big global brands like Gucci, Ralph Lauren, and Chanel began eyeing the lucrative prospect that the market presented. Many Indian fashion brands, like the multi-designer boutique called Ensemble featuring top designers like Tarun Tahiliani, opened shop, even as the economic liberalisation opened the floodgates to foreign brands. Couture styles like the kurti, cocktail sari, and corset blouse emerged out of this marriage of western and Indian sensibilities.

Leading designers, like Manish Malhotra and Manish Arora, built on this success in the late 90s and the early 2000s, popularising the now-famous fashion trend of Indian kitsch, which combines bold colours and quirky prints to create inventive designs that appeal to the modern Indian consumer. Showcase events like the Indian Fashion Week and the Lakme Fashion Week were launched, rapidly rising in eminence on the global fashion calendar. The growing prominence of large shopping malls and the rise of the 'mall culture', which saw consumers frequently heading to their nearest shopping malls for their shopping and social interaction requirements, also played a major role in popularising high-end fashion amongst the masses. Individual design labels and large fashion houses



identified the potential that this development presented and started setting up their shops in top malls across the country, reaching out to a much larger section of the population than ever before.

The Indian market, too, began responding to this change in aesthetics, style, and consumption behaviour. Stylish, sensual dresses became more common amongst women, while men seemed to prefer smart casual and professional clothing. Localised manufacturing capabilities were developed by national and international fashion brands. Retail supply and distribution chains were strengthened, even as celebrities

started exerting their influence on the larger fashion ecosystem as show stoppers and brand ambassadors. India had finally arrived as a big-ticket fashion market on a global stage.

Booming, booming, boom: How the fashion market has grown since the smartphone revolution

Fashion, as an industry, has continually grown since digitisation took over the world, but the biggest impact was felt in the way fashion brands reached out to consumers. The ready availability of the internet and the proliferation of smartphones made fashion more

accessible than ever before; Indians could now just go online to search the latest fashion trends and buy their choice of couture from online stores. With consumers rapidly adapting to this new paradigm, many large offline fashion businesses jumped onto the online bandwagon to maximise their revenue streams and to tap into the growing opportunity to cater to the increasing digital-first populace.

This development, however, had a insignificant impact on the retail fashion business during its initial phases. With consumers no longer required to go to a physical store to buy what they wanted, footfall at physical fashion outlets fell drastically over time. There were certain monetary benefits of opting for e-commerce over physical retail as well; since online sellers did not have to invest capital into establishing and running a physical outlet, they had higher operating margins and could offer

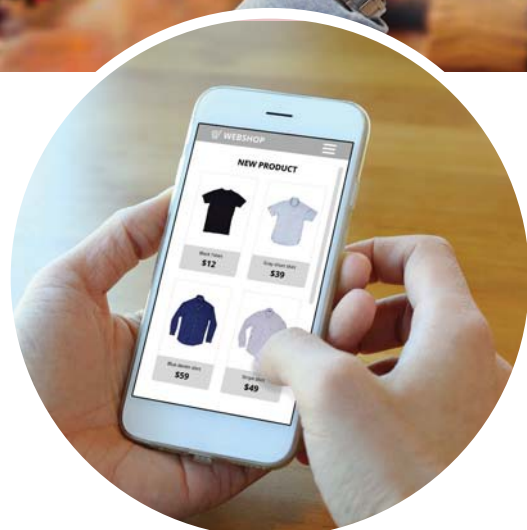
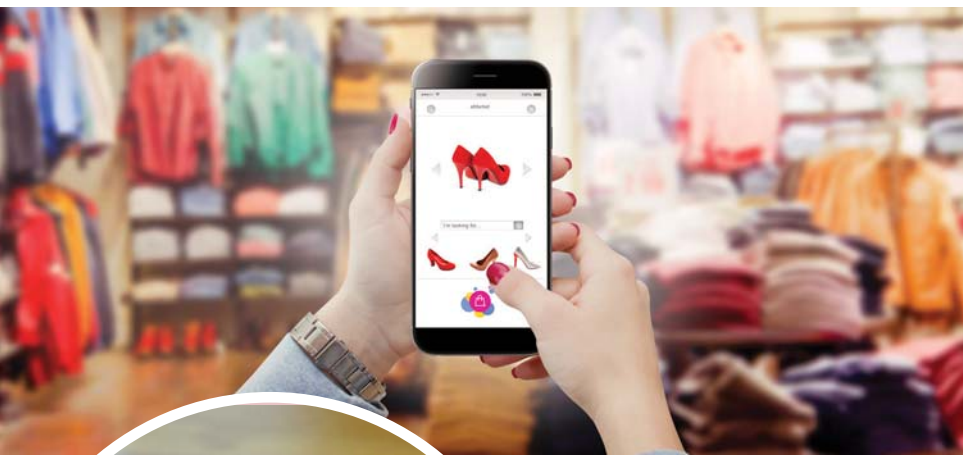
the same items at lower prices to their customers. Industry experts predicted the end of retail fashion as we knew it, and hailed the coming of e-commerce as a game-changing development.

Time has since proven most of these predictions wrong. E-commerce, despite its strong growth, has failed to displace physical fashion retail as the top dog in the larger business landscape due to its own unique set of challenges. Shopping for fashion, for Indians, is an extremely personal decision dictated by emotions. Indian shoppers need to feel the couture that they are buying on their fingertips, they prefer to wear and see how the dress will look on them. This is just not possible with e-commerce. The instant fulfilment that going into a fashion store and buying a new item to add to one's wardrobe can provide is something that online shopping, despite its continued efforts, has been unable to replicate. The kind of

shopping convenience of the new-age fashionista, technology has made it possible for offline brands to optimise their overall operations. Sourcing and supply chain management has become infinitely easier with the integration of digital technologies, as have other business-critical aspects such as marketing and visibility. New-age tech, like that of geolocation-based targeting, is being implemented by leading malls and physical outlets to reach out to prospective consumers with highly-personalised offers and greater accuracy, thus increasing the footfall at offline stores. Consumer data is being analysed to identify the state and unstated needs of individual customers, effectively breaking down the larger consumer base into a market of one, to provide fashion houses with detailed insights into what customers actually want and cater to their demands. Customers, too, increasingly prefer to use online as more of a research tool which provides them with information about the latest deals, offers, and style trends, before heading to their nearest retail outlet. This niche is being tapped through hybrid retail models currently being developed by leading shopping malls, which combine the best of both online and offline channels to the most optimum operations and end-user experience.

India, as we have said before, is a fast-emerging fashion destination. Leading national and international brands have been expanding their bouquet of offerings in the country to cater to diverse needs of its fast-growing consumer base. Rising disposable incomes also mean that Indians have been spending more on products that they aspire to own, which is another positive for the country's fashion industry. The future of fashion in India, it seems, is firmly secure, and the only way to go from here seems up.

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personalisation that shopping in a physical space provides, with expert advice from trained professionals at every step of the way, is again something that all the algorithms in the world find tough to match.

But that is not to say that e-commerce hasn't been beneficial to the offline ecosystem. In addition to providing an additional revenue stream to fashion brands and adding to the



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A report on Images Fashion Awards 2018 - the premier recognition for excellence in fashion business in India.

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MICHAEL YACOBIAN

EXECUTIVE MASTER CLASS

BY SHIVAM GAUTOM

Michael Yacobian's Executive Master Class unfolded the 18th edition of the India Fashion Forum on 13th of March 2018. The masterclass aimed to assist retailers in attracting, developing and retaining today's omni shopper, by creating an experimental in-store and online buying environment. These proprietary customer interaction skills and knowledge acquisition programs are designed to increase the quality and frequency of the omni shopper's in-store interaction driving conversion and basket size.

As a veteran of the global fashion retail sphere, Michael Yacobian boasts of over 30 years experience with some of the most prominent name and labels including, Nordstrom, Bloomingdale's, Chanel, Gucci, Ralph Lauren, Staples, Casual Male XL, The Collective and Lord & Taylor. He is also credited to have achieved a surplus of US\$ 1 trillion in sales with more than 75 thousand stores and has trained an excess of 3 million Associates and Managers over the years.

"The buying environment is nothing but 'a sensory in-store and digital experience designed to increase the quality and frequency of customer interactions, stimulating the most powerful emotion in retail.' The quality and frequency of the interaction is the key factor that kindles consumer's natural emotions to buy and drives transactions in a retail setup."

—Michael Yacobian, CEO,
YACOBIAN Top-Line Solutions, LLC

After a brief introduction of all the CEOs in the panel, Michael Yacobian, recollecting his yesteryears in his family retail store, reflected on how he realised that action and activity created interest, which he underlined is the fundamental of the retail idea of buying environment. "It's not about selling, it's all about helping customers buy," he said. This is where he formed his basics of buying environment, which according to him is the opposite of selling environment.

What is a Buying Environment?

Yacobian defines that buying environment is nothing but 'a sensory in-store and digital experience designed to increase the quality and frequency of customer interactions, stimulating the most powerful emotion in retail.' The quality and frequency of the interaction is the key factor that kindles consumer's natural emotions to buy and drives transactions in a retail setup.

"We all also monitor traffic in our retail set ups, but today, I am gonna show you how to use that information in a way so that it makes an impactful outcome. We have to analyse it in a way that it empowers us with the idea of impacting with skills and knowledge of the outcome of consumer interaction," he added.

The Natural Emotion to Buy

"We all love to buy, don't we?" exclaimed Yacobian, "It exists in all of us and it is an inexhaustible need and easy to stimulate. A very beautiful facet of the fashion retail business is that the consumer keeps coming and gives us an opportunity to impact the consumers' experience every day and every hour. It's fascinating in fact."

To get a more meaningful picture, Michael Yacobian then took the conclave through a series of ways that have been time tested over the years.

TOP-LINE SOLUTIONS

YACOBIAN

Every retail business has a definite value equation. It all starts with a brand and image marketing. “We try to get the message out to our customer. We are all looking for eyeballs and ears. What that is supposed to do for effectivity is that it drives consumers to us. Today, as the digital world is developing the consumer accesses our brands in a slew of different ways and from a retail perspective, each of these visits have tremendous value,” he added.

One of the most crucial parts of a sound buying environment is people and the ability to understand them. “This is the most important component and if you get this right you will have the ability to become a category killer. It is an uphill task — they turn over, they have points of view, they talk back and they don’t do what we want them to do all the time. But we now have a physical and digital way of thinking about one thing. Humanising our brand,” he added.

Humanising A Brand

The Retail 101 starts with a right product at the right place and at the right time. “But, over the years, I have realised that something very crucial — we have steered away from people and their importance. What happened in the evolution of retailing is that we moved away from the importance of the people and veered more towards the product - product mix, product merchandising, etc,” Yacobian added.

He then shared about “Retail 102”, which is all about the right people at the right time and place doing the right thing.

Slow Shopping

Slow shopping is just what it sounds like: a concept from retail and grocery stores that encourages customers to slow down

and not rush through the store. “We go to all the trouble to get the consumer to come to us and we get them out as fast as possible. But no, we should actually want them to slow down and make them want to stay at our stores longer. This not only increases the propensity to buy but also keeps them away from our competitors. This stands especially true in contemporary times where we are constantly fighting for the attention and time of all elusive omni channel consumer.

According to Yacobian, the next retail gold rush is going to be increasing duration of what he calls ‘Visit Minutes’. “Because that’s what we all have been doing throughout to achieve, invested time, energy and money to build a space that our consumers can access,” he added.

He then proceeded to share with everyone a series of skills sets that can help associates engage comfortably with customers with eagerness, professionalism and energy and aid in bolstered conversion rates.

Pro-Activity - The Passport to Productivity

Pro-activity is the skill of using operational tasks as a way to generate energy, connect with more consumers and complete the work we need to get done in order to keep things running smooth and looking great. “When we are doing routine work like recovery, product merchandising, new product placement, etc., it creates the kind of energy that makes the consumer more comfortable with us around. The simple fact is that when consumers are comfortable they stay in our stores for a longer time which increases their chances of buying dramatically,” he adds.

Customers are attracted to the areas of the store with action — where things are happening. This concept allows more time for the merchandising displays to catch their eyes, create

curiosity and cause them to consider more products. “Think of tasks as ways to energy, increase availability and comfortably promote interactions with the consumer,” he added.

Hello - More Than a Word - A Language

In a buying environment, hello is an incredibly important first impression of a brand that sets the tone for the entire visit of a consumer. Whether a warm impression or a lacklustre one, these impressions happen in seconds and are impossible to reverse or undo. “The words we say make up only about 7 percent of the overall message; it’s the body language that conjures magic, making up the remaining 93 percent. So when we combine what we say with how we say it, we create what I call the whole ‘body hello’. Just understand the impact it has on our customers’ buying decisions considering that it is most often the first thing a consumer hears, sees and feels. Even in situations when you are preoccupied to say hello, a simple smile, eye contact and an acknowledging gesture goes miles in assuring your availability for consumers.”

Assess Interest - Ready or Not - Here They Come!

A store witnesses a plethora of consumers everyday, each unique in their own aspects which can make interacting challenging. But it has to be borne in mind that they all boil down to two basic types — consumers who are interested and the ones who are not interested in your help. “This simple thought will reveal that every consumer, non verbally transmits, what we call, Signals of Interest. And once you recognise them, I personally assure

>

that you will be far more successful interacting resulting in more consumers wanting to work with you. A customer's state of interest can fluctuate very quickly, so stay aware and be aware of your customer's signals of interest because when you do you will be able to tailor your conversation, making it far more effective," he added.

Give and Go - Stop Hearing "No"

There is no greater conversion killer than the word 'No'. In a retail landscape, no is very often the first word that a consumer offers while on a store visit. "Now, why is that? Consider this, the first thing that a consumer hears from a store executive is may I help you? We will have to consider that a vast number of consumers who initially begin their visit are not really interested in any help. So if you walk up to those consumers and ask them if they need help, you know that the answer is likely to be a 'no,'" he added.

So how do you stop hearing no and give it a go? Talking about a few simple yet extremely effective skills designed specifically to boost the buying emotions of those who are not yet interested customers, Yacobian added, "These customers not only value their time and space but they also like something else – information. And that's exactly what I mean when I say give and go. So what kind of information do you give them? It's simple, the kind that customers appreciate – information about your products, coordination of products for a specific look, events and promotions, loyalty programs, etc."

Connect - The More We Connect, the More We Convert

The importance of the conversion number is slowly growing because the number of customers that visit is slowly shrinking. Conversion results when the customer's desire to buy becomes the



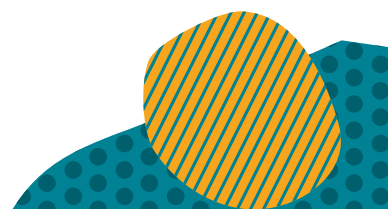
decision to do so. "And it's you that has the greatest impact on bringing these two fine emotions together. But in order to make this happen you first need to connect, which is all about reading and reflecting the customer's signals of interest. When done right, the customer can see, hear and feel your genuine interest which ignites the emotion to buy.

Re-Connect

While the saying "The More We Connect, the More We Convert" is true. Sometimes it is important to re-connect in order to convert. "A lot of times, when a customer says things like 'No thanks, I am just looking' or 'Thanks, I am all set.', the most natural response is to say 'Sure'. While this gives your customer what they want - time and space, on the other hand you just made it a lot more difficult to re-connect. Hence, instead of 'Sure' a change of words to something like "Would it be okay if I check back with you in a little while is more effective as it almost always garners a 'Yes' from the consumer. The customer gets what he wants and also is assured that there is someone waiting to assist if needed. When you see that the time is right, you can comfortably reconnect because the customer is expecting this to happen. It's just a matter of changing your words, but chances of success are very high," he added.

Identify Needs and Likes - Present Products - Knowing Before Showing

Fundamentally, a purchase is done for two reasons - we need things and we like things; so the key to aid in a purchase is to discover one or both from your customer. Once discovered, it helps the associate to powerfully present product solutions. This is where knowing before showing comes in. Most of the times there is a knowledge gap – while an associate knows about his products he knows nothing about the consumer. At the customer's end, while he knows his needs, he is clueless about the products. So the objective is to close the gap. "There is two ways to do it. The first entails asking easy to answer questions to know the specific needs and the preferences of the consumer. Each answer from the customer is a step closer in closing that knowledge gap. Associates will also have to keep in mind that they have to ask the types of questions that will encourage customers to share information about themselves," Yacobian shared.





PANELISTS:

- Atul Madan**, Director-Retail, SSIPL
- Martin Nordlund Jenen**, Director, Monili Jewellers Dubai
- Gautam Saraogi**, CEO, Go Colors;
- Akash Daultani**, Komal Craft
- Dilip Kapur**, Founder President, Hidesign
- Anuj Batra**, President, Alcis
- Amit Pande**, Brand Head, The Collective & Int. Brands, ABRL
- Pranay Sabharwal**, CEO & Design Director, Loco-motive Design
- Lalit Agarwal**, CMD, V-Mart
- Vinay Nadkarni**, CEO, Globus
- Dharmesh G Patel**, MD, Options Clothing
- Vijay Jain**, CEO & Founder Director, ORRA
- Rohiet Singh**, COO, Tommy Hilfiger India
- Vineet Gautam**, CEO, Bestseller India
- Roma Bhatia**, Prakriti Collection
- Vivek Bali**, COO-Sephora India

Once the associate has enough information, he can then offer product options. “Always try to offer three items and always do it enthusiastically. Share your product knowledge by highlighting features and benefits that match your customers’ needs and style and fit preferences. Once the customer is satisfied, resist the temptation to say ‘Is there anything else that I can help you with’, because the answer to this question is so very likely ‘no’ and the visit is very likely to end. Instead, this is the time to recommend a product solution. The best part is that you already have all the information about the customer to do it. Now, product recommendations should always encompass three items — a top, a bottom and matching accessories. Basically, the idea is to use the item so that the customer wants an entry point and then enthusiastically take them through a product discovery session., helping them identify additional pieces that they might end up buying,” he added.

Balance Multiple Customers - The Art of Spinning Plates

While massive footfall is every retail’s dream, it can be very difficult for the associates. In such a situation, the

call of the hour is being pro active and comfortably setting up the stage, which essentially means preparing the customer one is working with for the possibility that the associate might need to assist other customers. “You can say something like ‘The store is beginning to get a little busy and I may need a break briefly just to get the other customers started, would that be okay?’ With the right amount of respect and true concern. The customer will generally agree. Once the stage is set the primary corn will be the customer you are working with but if you see a customer in need of assistance go help him. This simple gesture makes a big deal as it will make space for patience and a willingness to wait in the primary customer. When engaging with the second customer set the stage again by saying something like ‘Hi, thanks for your patience but I am actually working with another customer but I will be happy to get you started’. Also, it is really important to monitor the primary customer, while engaging with the second customer, for signs that you need to return. Disengage from your current customer with a polite professional explanation and comfortably re-connect with your primary consumer with the same eagerness, professionalism and energy. That’s all it takes,” he added. The more

you are comfortable with multiple customers the more you can see those conversion rates climb.

Thank and Encourage - Begin With an End in Mind

The end of a customer experience is as important as the beginning and whether a customer buys or not, the ability to give them a sense of appreciation for their efforts is critically important to encourage them enough return again. “For customers who makes a purchase, begin by expressing your appreciation and personalising it with something like ‘I have enjoyed working with you’. Also, support his purchase buy adding something like ‘I am sure you are really going to enjoy your shirt’. Now for the customers who do not make a purchase, these customers have made the exact same efforts to get to the store as the customer who has made a purchase and he deserves an equal sense of appreciation too. Remember, today turbo charged thank you that delivers a genuine sense of appreciation and the encouragement to return again changes the whole game,” Yacobian said.





PREDICTING THE “BUY BUTTON” IN YOUR CONSUMERS’ BRAIN

GANESH SUBRAMANIAN, FOUNDER & CEO, STYLUMIA

BY SHIVAM GAUTOM



In modern times, choices are exploding exponentially for consumers and it is an uphill task to stand out in the face of competition and catch buyers’ attention. Brands and retailers have long been trying to understand why consumers do what they do. It is a big challenge to decode why the consumers like what they like or what they don’t. In this session, Ganesh Subramanian illustrates how technological advances can help us decode neuro predictions.

Subramanian started off with a few exercises that demonstrated the typical human psychology – we believe in what we see. “This is how the fashion industry has been researching fashion for the last few decades. We walk down the streets, see a lot of stripes and we believe that stripes are trending now. But that actually is not true! It happens because we are driven by the numerator but we tend to neglect the denominator,” he added. This is a psychological bias called ‘Denominator Neglect’. It happens as we human beings have comfort with small numbers. Sharing another visual exercise Subramanian demonstrated how human psychology is deeply influenced by what we see around us. The exercise established how visuals create a priming effect on what we think in the subsequent context. “We are all primed all the time, unconsciously. We also succumb to these fallacies as we do research, betting on things we see and are far from the truth,” he shared.



“Stylumia analyses and derives actionable intelligence from unstructured data sources by applying advances in AI and computer vision, with the source of intelligence being images, user behaviour data, textual descriptions on social media and implicit signals mined from retail sites.”

-Ganesh Subramanian,
Founder & CEO, Stylumia

Neuro Prediction

In present time, consumer disposition is predicted either by asking consumers or by analysing data. “But the fundamental flaw is that, the concerned person who answers the question is seldom aware of what he wants. So, how can we know if he is telling the truth? So how do we get around it – we can rely on neuro prediction. Neuro prediction is at the intersection of neuro science, human psychology, deep learning and artificial intelligence,” he expressed.

To draw a clearer picture, Subramanian illustrated on how the human brain functions. “Of the three brain parts, viz, rational brain, emotional brain and the reptile brain, it has been established that the intuitive, instinctive and reactive, reptile brain is the one that aids in taking decisions. This instinctive part of the brain is about 500 million years old and is ever present, unconscious and uncontrollable,” he added.

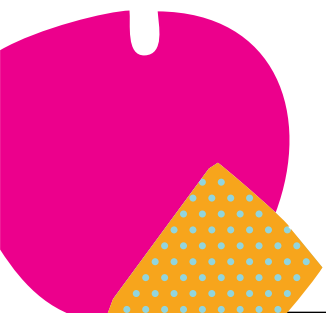
Consumers’ buying decisions, both online and offline, are driven by this instinctive brain and hence, it is extremely crucial for retailers and

brands to acquaint themselves with it. Taking a step further, Subramanian, once again drew on another visual exercise to demonstrate how the neocortex, or the rational brain frequently conflicts with the instinctive brain. “It’s very important to note that in order to get to the consumer’s reptile brain and focus, we need to understand ways to stimulate it. The reptile brain is self centered, captures contrast, is tangible, understands mostly the beginning and end, is extremely visual, and lastly, is very emotional,” he added.

So can understanding the reptile brain be beneficial for any application? “If we understand the reptile brain of your consumers, it will work wonders across various streams of profession. For designers it will mean better creations and delight, for merchandisers it will be better availability, buyers will create better sales, leaders will create better teams, mall owners will create better experience and store owners can come up with better stores,” he added.

Stylumia has banked on neuro prediction to offer brands and retailers with a slew of innovative services pertaining to understanding consumer psyche. “We use neuro prediction to understand a lot of things. Like we can predict the heat map of the store by our neural engine which tells the major areas that enjoy the focus of customers the most. We also use our neural engine to decipher what are the exact heat points of a dress or design creation that attracts the reptile brain of the customer the most,” he added.

Stylumia analyses and derives actionable intelligence from unstructured data sources by applying advances in AI and computer vision, with the source of intelligence being images, user behaviour data, textual descriptions on social media and implicit signals mined from retail sites. The result is that fashion and lifestyle professionals across the globe are able to make laser-edge informed decisions for current course corrections and future directions.



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INDIA FASHION FORUM 2018

PUSHING THE BOUNDARIES OF FASHION INTELLIGENCE



The India Fashion Forum has been nurturing the Indian fashion retail evolution since the last 18 years. The annual event is known globally for being the chief catalyst of fashion business magnification in India, facilitating the most powerful brands, companies, professionals, academicians and experts from across the global fashion fraternity to converge every year with a single minded focus on learning, sharing, evolving and catalysing the growth of the complete fashion value chain.

As with every year, IFF 2018 benchmarked a new high reinforcing its prodigious stature as the chief instigator of a fashion forward India. Hosted on the 13th and 14th of March at the Hotel Renaissance, Mumbai, the proceedings of the 18th edition of the event revolved around the four core themes – Intelligent Engagement, Powered by Design, Retail as Experience and The Tech of Everything. Keynote addresses, panel discussions, CEOs roundtables, presentations, customer experience (CX) sessions, and workshops throughout the two day extravaganza discussed at length on subjects spanning across artificial intelligence in retail, intelligence design retail



technology, luxury fashion in India, triple bottom line retail strategies, fashion licensing, etc.

IFF 2018 also registered an astoundingly large international participation. A great opening moment of the entire event was Retail Guru Michael Yacobian's masterclass for IFF Privilege Club Members that focused on in-store interaction principles for associates to craft the perfect Buying Environment. Also a part of the event were luminaries from Yale School of Management, Iowa State University, University of North Texas, Oklahoma State University, Retail Management Consultants, UK, Dyson, Amazing Jewellery, and many more.

The master of ceremony of the event, Anish Trivedi, President & CEO, Alenka Media; and Chairman, Banyan Tree Communications said, "The industry has changed a lot in the last 18 years and IFF has changed with it. Over the next two days you will get a close look at how the next generation in tech, AI and analytics is shaping the backend and the front end of fashion. IFF will give you all what some of the industry's greatest leaders and influencers believe will draw the smart fashion movement in India."

A new addition to the IFF agenda this year was the addition of a slew of Presentation Awards. Other top voted sessions included SoloX, The International Licensing Industry Merchandiser's Association's (LIMA) session on Fashion Licensing Driving Growth Globally and in India, Adidas' Fashion Lifestyle for a Fitness Economy, etc.

For those who missed the event, IMAGES BoF bring you a detailed report on the key sessions of the India Fashion Forum 2018. In the following pages, you will find deliberations laden with gems of insight that will propel the Indian fashion retail sector in the right direction. Also a few customer experience (CX) sessions, along with 'the IFF Grand Finale: How Shopping Centres Make Fashion So Much More Exciting for Consumers?' and 'The Business of Fashion for Investors', will be covered in the next issue of IMAGES BoF.

IFF CHAIRMAN'S WELCOME ADDRESS AND INTRODUCTION TO THE 18TH EDITION OF INDIA FASHION FORUM (IFF)

SURESH J, CHAIRMAN IFF 2018, MD & CEO- ARVIND LIFESTYLE BRANDS LIMITED AND ARVIND RETAIL LIMITED

BY SHIVAM GAUTOM



Technology's impact on the retail sector has become increasingly difficult to ignore in modern times. While technology has always been in the news for its disruptive nature, very little has been highlighted about the complementary responsibility technology has shouldered to streamline processes, develop more efficient systems, and modernize operations within the fashion and retailing industry. The 18th edition of IFF envisaged to shift from the atomic view to a holistic perspective on how newer technologies have begun to revolutionize operations and businesses alike in the fashion industry.

The presiding Chairman of IFF, Suresh J, inaugurating the event, emphasized on the theme of IFF 2018 – “The Smart Fashion Movement” buttressed by four calibrated platforms viz, Intelligent Engagement, Powered by Design, Retail as Experience and the Tech of Everything. “We have to take a look at the the current happenings around the world and take the key takeaways. We definitely need to ensure that the principles on which our model of scaling up is based on is unerring. I believe, we have the understanding of what made some of the big brands of the US and other parts of the world non-relevant today and with the hindsight, we should strive towards building a fashion industry that could stand the test of time. In my inaugural speech in IFF 2017, I mentioned the ABC that is going to drive the fashion industry in India in the future,” he said addressing the gathering.

“The Indian fashion sector is on the threshold of growth which is being very well complimented by the influx of technology and it will make it even more perfect than any other country's case study.”

—Suresh J,
Chairman IFF 2018,
MD & CEO- Arvind Lifestyle Brands
Limited and Arvind Retail Limited

While A stands for analytics, B is all about the turnaround in terms of the fashion cycle, which is shrinking with each passing day and C refers to compliance. Analytics has now become an integral tool for fashion businesses, and helps in deciding a plethora of factors right from customer experience to the assortment inside a store. The typical fashion cycle, generally a 50 to 60 weeks turnaround cycle from design to being in the store, is now on the verge of being obsolete. Operations happen at a much faster rate now, which concepts like ‘Buy Now’ being in vogue. There is no way around compliance for any enterprise today, given the awareness of the modern consumers. Be it social or environmental, compliance is one of the buzzwords that is increasingly playing a bigger role in pushing the fashion industry to the horizons of success.

“As a fashion industry, India is growing by leaps and bounds and coupled with the technology that we can afford today, I am very optimistic about the future of the industry and the opportunities that it harbours. And IFF 2018 has been structured to reflect on the various ways that technology can be exploited in order to build a fashion business that can stand the test of time. It also promises to talk a lot about delivering customer experience, which now has become the Holy Grail of retail today. I am sure you will find the next two days very enriching and I wish you the very best as you enjoy the next two days of deliberation,” he added.

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TRANSFORMATION THROUGH INNOVATION



“Ultimately, it is all about making the world a better place when we leave it than we have inherited it,”

DAVE THOMAS, MANAGING DIRECTOR, ADIDAS GROUP INDIA

Adidas has a strong representation in the market today. Over the years, the brand has embossed itself as a brand that has always been relevant to its consumers a feat that can solely be attributed to transformation through constant innovation. Taking the stage, Dave Thomas, expressed his contentment for being associated with the topic and said, “I am honored to be here as this is a topic very close to my heart. At adidas and Reebok, we have undergone tremendous transformation over the years — with innovation at the core.”

Taking the conclave through the innovation accomplishments of adidas over the years, starting from the first running spikes prototype to some more recent ones like the Boost technology in running shoes, Dave Thomas showcased how transformation through innovation has helped the company to bring around footwear that changed the industry, sports and the way that athletes perform. “We talk about innovating

daily and transforming to best serve our consumer. At adidas we put it through this sort of a lens — the six P programme Performance, Process, Passion, Progress, Partners and Premium Experience. It is not always the product but also about the process how we have innovated and we continue to do the same to bring newness to the industry.”

Dave Thomas then went on to talk about the company’s latest technological wonder, the Speedfactory, that has helped it to shorten the supply chain. Speedfactory use robots and novel production techniques like digital knitting and 3D printing to manufacture trainers and sports shoes. Adidas is also vying to get these production techniques to the stores, directly to the consumer so that the lead time is cut and customisation becomes easy.

Another technique that adidas is banking on is called Futurecraft 4D. Recognised as the “world’s first high performance footwear featuring midsoles crafted with light and oxygen”,

The Futurecraft 4D is a forward-thinking, low-top silhouette with a technologically-advanced midsole built for maximum breathability, comfort and better energy control, as well as a well-fitting Primeknit upper. These shoes adapts to an individual feet differently.

“Innovation to us is also about passion — a passion for newness, an addiction for progress. It’s also about innovation for progress — innovating for change, for social change. Like our partnership with Parley where we have taken a lot of plastics from the oceans and we are working on turning it into shoes. We also innovate with partnership, we keep it open for innovators around the world and work with other companies and brands to put in inputs and help us transform. And finally we innovate for a premium experience and win consumers at all touch points with strong services. Ultimately, it is all about making the world a better place when we leave it than we have inherited it,” Dave Thomas concluded.



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FASHION ON THE FAST TRACK

CONNECTING HUMAN & ARTIFICIAL INTELLIGENCE, TECHNOLOGY AND ENGAGEMENT- DELIVERING FAST FASHION TO CUSTOMERS

ANANTH NARAYANAN,
CEO, MYNTRA & JABONG

What is changing for consumers of India and about technology? The fashion and lifestyle industry is today around US\$165 billion and is growing at about 11 percent per annum. On the other hand online is around UD\$ 4-5 billion which is equal to 4 to 5 percent penetration in India. If you take an example of any other part of the world online penetration is minimum 15 to 20 percent. China on the other hand is close to 30 percent.

India has already seen a large scale of growth online. But, this is just the beginning and in the coming 5 years it will grow to US\$ 20-25 billion in India. Omni-Channel backed with technology will lead to the growth of the industry. Half of the organised retail in the country will somehow be powered by technology in e-commerce in the years to come. So in about 10 years from now if one were to look back he will clearly say that Indian fashion and lifestyle sector was on a major transformation path today.

1. How the Indian consumer is evolving and changing?

India over the next 3 years will have over 600 million Gen Z consumers. These are the people born post 1996, which itself is double than the population of the US. Secondly, today we have an over 1.3 billion population, out of which 500 million access internet in some form or the other. 230 to 250 million access through 2G and 3G, according to WhatsApp data. These Gen Z consumers spend most of their time on internet and mobile phones accessing lot of content. Ananth quoted an example and said, "If I look at and 60 million of these shop now. In the next 5 years I expect this number of shoppers to grow to around 300 million doing online shopping in the country. On the other hand, the way these Gen Z perceive brands is very different."

Gone are the days when the brand used to create hype through the latest trends. Today these customers follow the trends on instagram and exchange views what they like and their friends don't. "There is a clear evidence that the brands are getting build digitally. It's a fact that the first 100 million customers on internet were mostly men, English



“It’s a fact that the first 100 million customers on internet were mostly men, English speaking and urban. The next 100 million which will come online are mostly vernacular and women and they access internet in a way they used to never do before.”

-Ananth Narayanan,
CEO, Myntra & Jabong

speaking and urban. The next 100 million which will come online are mostly vernacular and women and they access internet in a way they used to never do before. The first stage they get on the internet is for entertainment, then is for social media, then buy online digital products like tickets and then buy other products. This on an average takes 3 to 4 years in average lifespan of a consumer,” he added.

2. The Role of Technology- Both in terms of business and consumers.

Ananth explained the role of technology and said, “In Myntra technology is in our DNA. Till now marketing was limited to ATL and BTL channels whereas we now push it up to digital channels, TV and then print. In our last campaign we had about 100 thousand videos, which were worked upon by a Silicon Valley startup to customise appeal to different geographies and culture. So essentially, a customer in Delhi will see a different video than a customer in Mumbai. Nevertheless this will continue evolving which suggests that marketing will become more personalised in the years to come. Myntra today delivers to 19,000 zip codes across the country, which actually is still not a very personalised experience. We need a lot of Artificial Intelligence to get accurate data to get things right. I would give you an example of this with Myntra End of Reason Sale where we actually shipped the products before the customer’s order. So when we got this 95 percent right we could deliver the products much faster than anyone else. This is all done by using analytics and artificial intelligence which demark a probability of customers buying something. At Myntra we also use artificial and machine intelligence for product design.”

3. Implications for being offline and online in the fashion space.

Last but not the least, whether you are offline or online you need to embrace technology to give better customer experience at every level.



INDIA BUSINESS OF FASHION REPORT 2018

The 15th edition of the India Business of Fashion Report (IBOFR) was released by Sarada M Muraleedharan, DG, NIFT, after the inaugural session of IFF 2018. Since the last 14 years, IBOFR has been the ultimate guide to the fashion business in India. Historically, IBOFR encompasses exclusive reports from both domestic and international fashion consulting and research leaders and is also a rundown of the top developments and trends - meaningfully juxtaposed against the backdrop of events and people who created bits of history that year.

Participants of the 15th edition include Stylumia, Trendforsker David R Shah, Eastman Chemical Company, WGSN, Technopak, Wazir Advisors, Google, Safexpress, JLL India, Isobar, Future Research Company, Creyate, Frost and Sullivan, Arvind Limited, NIFT, Reliance India Ltd, Tukatech, etc.



MODERATOR:

1 **B S Nagesh**,
Founder, TRRAIN

PANELISTS:

2 **Prof. Ravi Dhar**,
Yale School of
Management, USA

3 **Dave Thomas**,
MD, Adidas Group
India

4 **Suresh J**,
Chairman-IFF, MD &
CEO, Arvind Lifestyle
Brands Ltd.

5 **Sarada M
Muraleedharan**,
DG, NIFT

6 **Ananth Narayanan**,
CEO, Myntra & Jabong

INAUGURAL PANEL DISCUSSION

BRINGING ALIVE THE FUTURE OF FASHION & LIFESTYLE THROUGH INTELLIGENCE, DESIGN, RETAIL & TECHNOLOGY

BY SHIVAM GAUTOM

India's fashion industry has a bright future and there are strong reasons to it. Firstly, India has a large young population. This combined with increasing disposable incomes has led to an increase in consumerism. Fashion and lifestyle segments are poised for tremendous growth and retail is revolutionising through technology and intelligent design.

The inaugural panel of IFF 2018 discussed the future of fashion and lifestyle through intelligence, design, retail and technology, with its eminent moderator and some very distinguished panelists:

Excerpts of the discussion

Moderator (B S Nagesh, Founder, TRRAIN): What is the fashion scenario at the level of the Indian consumer level?

Sarada M Muraleedharan, DG, NIFT: The youth of India are very high consumers of fashion and they are clear with their understanding, and also on what they know and what they don't. They today need fashion which is a mix of their traditional and modern aspects. The company which is able to adhere to this need will be most highly regarded.

Moderator: How do you see the readiness of Indian consumers to innovation and technology when it comes to fashion?

Dave Thomas, Managing Director, Adidas Group India: The new way of doing things is happening in India. We are proud that the consumers know about our Originals brand as in the other parts of the world. The heritage of the brand Adidas is well understood in developed markets like Europe. But here in India it was different. We had to re-imagine and retell the story of the brand to be successful.

Moderator: From apparel to accessories to beauty and cosmetics, what has worked for your company?

Suresh J, Chairman, IFF; MD & CEO, Arvind Lifestyle Brands Ltd.: It is quite simple. Think from the customers' point of view and it's very easy to adapt whether it is apparel or beauty business.

Moderator: How do you get to learn from the customers? And what kind of a mindset does the CEO need to have in this culture of being omni-channel?

Ananth Narayanan, CEO, Myntra & Jabong: If I look at the consumer perspective as to how digital has changed them it is that they understand consumers shopping habits better than offline. Digital can even give you data of the time spent by the consumer on the site, when did they select a product and when actually they made the final transaction. If you see Myntra as an example, 40 percent of the people login through their Facebook accounts, which gives a lot of understanding about the consumers' profiling. This understanding of the consumers and their needs creates incredible opportunities to create new brands and to satisfy them in many different ways. So the understanding about online and offline issues and their digital behaviour is very important for the companies.

Today there are a lot of people from outside the industry who are joining fashion business where it is always a great idea to learn from each other. At Myntra 50 percent of our employees come from non fashion backgrounds like IT, etc., and it really creates a very encouraging atmosphere when two subjects meet for a common goal.

Moderator: What is the difference in consumers of young India to that of United States?

Prof. Ravi Dhar, Yale School of Management, USA: The online and offline issues are even observed in the US. When we talk about fashion, there is a lot of impulse purchasing which mostly happens offline. The online stores have still not figured out how to get the impulse buying customer. When you are talking omni-channel one must understand that you are adding channels but your total sales might come down if you don't know how to build impulse online. So there are flash sales, runways, etc., where retailers have to figure out what works best for them for impulse buying. Another aspect is of customer experience where it has still not evolved on a great deal on online sales. In fashion one need not be too personalised. The more you make your product differently the harder to get its recognition. This technique of personalisation may work well with luxury brands.

Moderator: There is online, offline and omni-channel retailing happening. How do you see this play moving ahead?

Suresh J: I have a simple logic to it, which is the kirana model. It gives a fantastic experience in terms of convenience to the customer. Nevertheless the assortment in the store is never the same and he knows when to change it quickly with the space he has on his retail shelf. Third thing, it can provide you information about the brands which many big brands don't do. We can replicate the same experience as the consumer today is not looking at whether it's online or offline. What he is seeing is his convenience to shop. The issues come when a brand starts demarcating it for consumers to shop only offline or only online ignoring the convenience of his customers. Today we have to look at customers with a long term vision where he gets loyal to a brand. We run a loyalty program and even go to a level to personalise his experience with his choices and with his shopping patterns with our brands.

Moderator: There is a difference between how a retailer looks at selling and how the consumers looks at buying? Has the volume matrix of the fashion business gone up in the last few years? It is seen that the per capita volume is growing more but is the per capita value growing more in fashion?

Ananth Narayanan: I don't think the consumption overall is going up and it has nothing to do with the GDP of the country. You will be surprised to know that at Myntra's 50 percent of the sale is coming through tier -II and -III cities and there are actually the people who buy branded fashion. There is strong spending power in tier -II and -III cities wherein you may have a SEC A and B customers who do not have access to buy for brands. This is dramatically changing. It is for offline and online retailers like us to figure out how to sell value. So if you say value then it's all about the content, the personalisation and the ability to tell a story, so that they can bring out the magic in a product. Today the customer is more transparent in terms of pricing but the onus is on the retailers like us who have to give the value to him.

Moderator: Retail is not considered as an aspiration industry to work for? How can we make this place more exciting for people to work?

Suresh J: India is a different market when it comes to retail. There is a lot of personalisation needed. The role of a person is to be at the retail end and this will continue, whereas we also need to look at enhancing his skill sets. The mindsets have to change as gone are the days when it was the mall owners' responsibility to drive in the traffic. Rather today the responsibility also lies with the brand and its staff who can do a better job. In our company we always look at re-shaping the skill sets of our staff to understand the consumer needs better and help with recommendations and to finally sell.



INTELLIGENCE & INSIGHTS FROM INTERNATIONAL FASHION & LIFESTYLE BRANDS & RETAILERS

BY GURBIR SINGH GULATI

CREATING THE H&M AND ZARA OF FINE JEWELLERY

BY JASPER NIELSEN, FOUNDER, AMAZING JEWELLERY



Amazing Jewellery sells jewellery mostly in silver which is affordable and is making women get attached to love what it offers around the world. The brand is a well known name, full of energy which is always a good formula for global brands to succeed in the market.

Jasper Nielsen, Founder, Amazing Jewellery defines his journey with key learnings as he says, “One thing I have learnt by travelling all across the world is that there is hardly any woman who had said that I have enough jewellery. So, it is a very beautiful business to work in. On the other, no technology has taken over this business and jewellery has been the same from over 1000 years. Nevertheless with every business there are challenges. We create beautiful fine silver pieces in our brand but we have to address the customers differently when it comes to millennials. This generation is more inclined towards wearing artificial jewellery and fake brands and I discovered the formula to market it successfully to them by following fast fashion in jewellery business. This is the vision I saw and established the brand called Amazing Jewellery which addresses the millennial generation. Amazing Jewellery is a brand which sells fine silver and hand pressed Swarovski crystal jewellery. This is where we lead. We sell (.925 Sterling Silver) 50 to 70 percent lower than existing brands and multi-brand outlets in a revolutionary interactive store talking to the millennial and young at heart. This normally is not seen in jewellery stores. We have huge collection of jewellery in pour stores and we get inspired from all the big brands in the world. Also we created a different appeal to our stores which are designed like night clubs and we have gaming and selfie stations across the store.”

FASHION RETAIL INNOVATION TO SERVE NEW GEN CUSTOMERS

BY MARTYN CLARK,
GLOBAL HEAD-RETAIL OPERATIONS, DYSON



Dyson Ltd., is a British technology company established by James Dyson in 1987. It designs and manufactures household appliances such as vacuum cleaners, hand dryers, hair dryers, air cleaners, etc. The company’s philosophy is very simple, “we solve problems which others ignore”.

Martyn Clark, Global Head-Retail Operations, Dyson, shared, “So we do not create or invent a brand new product and our products are born out of the customers’

frustration. The first change we brought was to the bag of a vacuum cleaner. It took us 5,127 prototypes to finally crack it. This is an insight into perfection.”

Talking about the company's future plans Clark shares, “The company is a part of private holding and does not have any share holding pressures. We

don't release the product in the market until and unless it's perfect. This is really the heart of the company. In 2017, we made a profit of 3 to 5 million pounds with a sales amount of 1.2 billion pounds. In 2018, we aim to invest 3 million pounds in upgrading the technology research and development. Our third biggest market is Great Britain after China and

United States. We recently launched in India with our first demo store in Delhi.”

The plan for 2020

The next four years will be bigger for the company as it will release 100 new machines in 4 new countries with 3,000 new people. A humble start from a vacuum cleaner we are now preparing to build an electric vehicle.

MANAGING MULTI BRANDS IN MULTI COUNTRIES

BY TUSHAR VED, PRESIDENT, MAJOR BRANDS

Before starting doing business with any country one has to understand the journey. As Tushar Ved, President, Major Brands defines it citing an example of UAE, “I have seen the country growing from a desert to what it is today. The country has made a mark in itself in the world. UAE has a population of 9.44 million but it gets a tourists flow of 14 million

coming and shopping in Dubai. Then it has 70 million people in transit who land at the airport and further take a flight to India, Australia, Bangladesh, Pakistan and almost every part in the world. Dubai adopts very little. It has tourists coming from Russia, China, UK, US and all these South Asian countries. We have global assortments in Dubai and have global seasons there. The only season which Dubai adopts is the in-season which is the biggest market. In Dubai you can go skiing and you can even find skiing shoes.”

A look at India, where it takes around 3 hours flight from Delhi to Chennai from Mumbai to Kolkatta which defines its geography that it's a very large country. Nevertheless at every 100 kilometers the language, the food and clothes change. As Tushar adds, “In India we do not do global assortments in fashion rather we work on global distortions with lot of localisations in accordance with the festivities. India is one of the fastest growing countries in terms of e-commerce, internet, technology and adaptability. Gone are the days when brands used to give different or one-season-old products in the

Indian market. The consumer here is very fashion savvy now and wants the same product at the same time as are available in other parts of the world.” In Dubai there are lots of customers who use a lot of bling in their clothes and shoes. Women prefer high heels as they are mostly travelling in cars. Whereas in India women prefer flat shoes as they walk a lot.

Tushar further talks about Major Brands as he quotes, “In the Gulf region we have 75 brands with 600 stores where we have some 60 stores in Dubai Mall itself. When we look at India we have 12 brands and we have 200-plus stores. The reason for this is that if I need to be in the Gulf which has a population base where I can open more brand stores compared to the geographical base in India where I can open more specific brand stores in different regions and expand.”

Tushar sums up his learnings as he clearly defines that the customer is the King and we as retailers have to adapt to his demands.





IN LOVE WITH FASHION: JOURNEY OF A TRADER WHO CREATED A BRAND OVER 25 YEARS

By Raza Beig, Director, Landmark Group & CEO, Splash & Iconic, Dubai one of the most admired fashion passionists spoke about what it took him to reach where he is today-various stages on product and brand building., as a trader, a buyer, a designer and finally a retailer.

Entrepreneurs are born out of hardships. If this is what has been written then it matches well with Raza Beig, as he says, “I have gone through lot of hardships and stress during my journey of life. I have done all kinds of jobs which have created a trader in me. My journey started exactly 25 years ago when I moved to Middle East to look after a store being designated as a store manager for Splash. During my life I came across a lot of people from different walks of life which clearly made me realise the importance of a customer for a brand.”

Beig talks about his experiences when he adds glimpses of his journey and says, “Retail was infancy to me as I had no clue what buying and merchandising meant in fashion business. The learnings learnt as a trader helped me to quickly understand the nature of customer needs in fashion. It was all about service. That is how I started with and slowly moved to the customer expectations and journey. As a start; after working for 2 months with Splash I was given the responsibility of going out and buying and I was given three briefs which are - the fashion which I buy is current, second it should be of great quality and thirdly it should

serve the consumer needs. After this directive I took the buying money and went to Hong Kong, Thailand, Korea and Indonesia. During this time we were working with around 7 to 10 brands which had very clearly defined quality standards with mainly fashion products which were essentials, and which could ensure our presence in the market in giving fashion. This made a successful mark and we did attract a lot of consumers who spent a good amount with us. This was clear evidence that the consumer was reacting to what we were buying and we were also geared up for retail expansion. With this we were firm on being consistent, giving fashion, giving good quality and value which was unmatched and the customer loyalty. We had a great run and we did not face any competition and were growing really fast. The key learning which I derived is that fashion is not only about buying and selling but its rather about thinking right and adding value to the change. Then came a time when a lot of Spanish brands started coming to the Middle East markets. This caught my attention and gave me an idea that our products were more essential and had a very nice multi-branded offering with lot of value compared to them, but we were not giving fashion as compared to them. This is where I started thinking like a designer. This design and creative journey has been the longest in my professional carrier. This process was completely new to me. Earlier it was all about buying and sourcing but the creation spirit was missing in our DNA. From the start of the year 2000 to 2006 we completely changed the format of

Splash. We were now shifting to creation where we were not traditionally talking about seasons, but rather we were laying stress on defying trends and conventions in fashion business. This again was a very interesting phase in my life where I was travelling to capture trends, training myself and my team, creating the right environment for buying based on trends, and hiring the right talent. It was only in around 2006 that 80 percent of Splash merchandise was in-house. This was a time where the brand building process started. Till this time we were creating private labels and it was in 2008 where we actually started to put the brand Splash on our labels. This gave the brand a creative benchmark of what it stands for in the market. By now we thought that we have understood the formula and now the theory of fast fashion came in the market. This is where brands were talking about 21 to 30 days of fresh fashion delivery. When this started we actually did not know how to go about it and quickly got on to change the entire process of our working to bring in fast fashion. Fast fashion only constituted 15 to 20 percent of our business the rest was working on the same flow.” Fashion has no adjectives and Raza sums up his journey in utmost simplicity as his love for fashion. Raza defined his amazing win when he shared, “Today the brand Splash sells ₹6,000 crores. We also built Iconic and a brand called Lifestyle which came through all the research done in India.”

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ANCHOR:

Bijou Kurien,
Strategy Board Member- L Catterton
Asia Holdings

PANELISTS

Joseph Leftwich,
Director, Retail Management
Consultants, UK

Raza Beig,
Director, Landmark Group & CEO,
Splash & Iconic Dubai

Tushar Ved,
President, Major Brands

Jasper Nielsen,
Founder, Amazing Jewellery

Martyn Clark,
Global Head-Retail Operations, Dyson

PANEL DISCUSSION

Fashion industry stakeholders share country/region specific insights, draw parallels and identify areas of possible synergies and cooperation for market expansion and driving cost and operation efficiencies.

Excerpts from the panel discussion:

Bijou Kurien: You have been advising many companies based in the various parts of the world about their expansion into this part of the world i.e. Asia, South East Asia, North Asia, etc. So when you meet these companies and when you look at these markets, how do you decide which markets are the most attractive to enter into?

Joseph Leftwich: Firstly when we select a brand that has planned its expansion we do test marketing in specific markets where we think it can progress. This includes even mature markets which are ready to welcome new products. During this plan we go and speak to the specific consumers are aligned with the brand's target audience, look at similar competition and look at opportunities for the new brand.

Bijou Kurien: *Between one market and many markets in India how do you choose with regards to the retail and product expansion?*

Martyn Clark: Dyson predominantly has been known because of their vacuum cleaners. They are opening up experience stores which really showcase the innovation of its product development. Their philosophy is telling their consumer that we are all about high-tech engineering and developing the best in innovation and future of consumer electronics. Dyson is all about perfection and we wish to showcase this experience to our consumers with the team of our experts who can explain them what goes behind Dyson products. For market entry like India we are clear that we will refine the experience, localize and tailor it to be customer centric.

"When we select a brand that has planned its expansion we do test marketing in specific markets where we think it can progress. This includes even mature markets which are ready to welcome new products. During this plan we go and speak to the specific consumers."

—Joseph Leftwich,
Director, Retail Management Consultants, UK



“Retail is changing and the boring part in retail is dying. So if you are boring, your store environment is not right, if you are not available – you will definitely die. One should understand that its never about the price rather its about the value of the product.”

–Tushar Ved,
President, Major Brands

“In Dubai, plus size is a must as the best selling size is 14 and 16. Going with that is very important. Today 10 percent of my business in Middle East is in plus size clothing. We did not have a great traction on plus size clothing in India as when you bring in a product you should have a sustainable customer base which we did not see in India. We are doing extremely well in the youth category”

–Raza Beig,
Director, Landmark Group & CEO, Splash & Iconic Dubai

Audience Question: Is Splash looking at expansion on online channel in India?

Raza Beig: We had launched in the month of November 2017 on Myntra and Jabong, one of the best fashion online platforms in the country. We have really not gone and marketed it strongly as we feel it’s a learning phase for us which we want to go through.

Audience: Any plans for launching plus size collection in India?

Raza Beig: When we launched in India we did not have the plus size clothing. In Dubai, plus size is a must as the best selling size is 14 and 16. Going with that is very important. Today 10 percent of my business in Middle East is in plus size clothing. In India the consumers which we are trying to attract are already into their salwar kurta’s or ethnic wear or probably sarees. We did not have great traction on plus size clothing in India as when you bring in a product you should have a sustainable customer base which we did not see in India. We are doing extremely well in the youth category.

Audience: What is the future of standalone stores in India?

Tushar Ved: Retail is not dying. I say this when people say e-commerce is taking over. What is actually happening

is that retail is changing and the boring part in retail is dying. So if you are boring, your store environment is not right, if you are not available – you will definitely die. One should understand that its never about the price rather its about the value of the product. For example we sell 75 brands right from fashion to coffee where we only differentiate on the element of value that the customers see in us.

Bijou Kurien: How do you look at market like India where silver products are undervalued in comparison to gold? Since you are manufacturing sterling silver jewellery how do you look at this competition?

Jasper Nielsen: Definitely you are very right with a market like India where you have a high amount of pure gold jewellery being sold here. But what we have seen with our presence in global markets is that people have a tendency to adopt big brands. The perception is changing and people are ready to experiment. The brand has to ensure that they are giving the right experience to its customers and they will have the tendency to choose us.

✕



MODERATOR:

1 Mevin Murden,
Luxury Brand
Management Faculty,
Istituto Marangoni,
Mumbai

PANELISTS

- 2 Abhay Gupta,**
Founder & CEO,
Luxury Connect,
- 3 Dinaz Madhukar,**
Executive Vice
President, DLF Luxury
Retail & Hospitality,
- 4 Kalyan Kumar,**
Chief Merchandising
Officer, Jabong,
- 5 Rajendra Kalkar,**
President -West,
Phoenix Mills,
- 6 Sachin Jain,**
President, Forevermark
India,
- 7 Samrat Zaveri,**
MD, Shaze Luxury
Retail,

LUXURY FASHION IN INDIA CONSUMER EXPECTATIONS AND EVOLUTION

BY SHIVAM GAUTOM

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Talking about the general state of the luxury market in India, Abhay Gupta shared that the Associated Chambers of Commerce of India has estimated that the luxury market will be worth around US\$ 30 billion by the end of 2018. “This brings us to the obvious layman question whether it is only fashion or is it some other segment too that will thrive? But visualising on a reality scale I think fashion, as a segment, is the most miniscule contributor on the value pie; segments like jewellery, automobile, real estate, health and fitness, travel tourism, fine dining, etc., are the areas that are contributing to the luxury market in India,” he expressed.

Concurring with Abhay Gupta’s thoughts to an extent, Dinaz Madhukar revealed that the luxury fashion market in India is definitely on a rise. “I head two luxury malls in the country - Emporio and Chanakya, and I can tell you that some of the brands are doing their best numbers ever in the last year. It was surprising because this happened despite of demonetisation, cap on spendings, GST, etc. Secondly, I see a lot of luxury brands very keen on entering India - because, India, as a market, is a very steady market and the most important fact is that the consumer is getting younger by the day. These consumers are experiencing luxury at a very younger age and it soon becomes a lifestyle. Although, we sure have a couple of decades till luxury becomes a lifestyle, the fact that it enjoys a very steady market is also undeniable.

Mevin Murden: What is the definition of luxury in India because it seems there is a bit of confusion in terms of it being very subjective?

Sachin Jain: The confusion can stem from when you compare gems and jewellery as a business because, especially in India, everyone consumes gems and jewellery here. There is no difference between the rich or poor when it comes to consuming jewellery. It’s an uphill task to break it up in exact figures, but yes commoditisation is happening big time and the move towards luxury is definitely real.

Samrat Zaveri: I have a different view, the way I have observed is that the consumer in the last few years is shifting its focus a little bit away from the product to consumer experiences. So, the definition of luxury is changing as it has changed in the West. It should happen in the next few years. People are looking for more customisation and personalisation, and in my opinion, that is what luxury is all about.

Abhay Gupta: In order to understand the concept of luxury, we need to understand who in India consumes luxury. It's subjective - luxury is different connotations and different definitions for different people. It might be an experience to someone, while for another it might be a mere product. India is very diverse in terms of languages, cultures, consumption patterns, and even economies, so every sector has its own definition of luxury. Even the structured studies divide India into different zones.

Kalyan Kumar: There are a slew of categories in fashion and lifestyle, right from apparel, jewellery, watches, and other accessories. I think, brands have different perceptions in each of the categories for a consumer. For some of them, the clothing bit looks more of a luxury but when it comes to accessories it is more affordable.

Mevin Murden: Can anyone comment on the cities in India because I have read a lot about how the metros and tier -I, -II and -III cities are like completely different countries altogether?

Samrat Zaveri: As far as luxury consumption is concerned, I think it's not only about money, people have to have the exposure to be able to spend that kind of money on a utility product. I see again that for luxury to penetrate into tier -II and -III cities, it definitely is a distant dream.

Sachin Jain: I have a slightly different view. As of now, we are present in 44 cities in India, and the consumer exposure in a small city is perhaps as wide and as real time as in the metros. And I think the readiness to consume brands that are considered luxury is very much in place. I agree with Samrat Zaveri on wondering whether there is a sound infrastructure in place, but consumer readiness is something that I can guarantee.

Mevin Murden: I have read somewhere that the tier cities' consumers lean more towards the inspirational brands rather than the metro cities. Is it true?

Dinaz Madhukar: Luxury is basically all about an experience, be it a brand's historic value, quality of products, or anything. In India, by and large, luxury consumption is mainly concentrated in Delhi and Mumbai. When it comes to consumption of a luxury product, people want to experience it for multiple reasons. One of the prime ones being the need to show that you have reached that echelon, which is very staple up in North. Any international luxury lifestyle brand wanting to enter India generally selects Delhi as its point of entry. The second concentration is in Mumbai, and the city is all about self consumption, you want it because you appreciate it. But do these tier cities merit a luxury hub like Chanakya, I don't think so. I mean, the store cannot afford to survive in these cities. People might have the bandwidth to splurge on vehicles or vacations for themselves but they are definitely not going to invest in that kind of consumption of retail on a daily basis.

Rajendra Kalkar: We have had a different experience in Palladium in weekends, in both Mumbai and Chennai, we find a lot of customers from far off cities like Pune, Nasik, Ahmedabad, Baroda, Surat, etc., come and consume luxury. They come in hoards, about 10 to 12 families, putting

up at St. Regis and indulging in luxury shopping. We registered the same enthusiasm in Chennai, where we launched last month. People came from places like Coimbatore, Mysore, Hubli, etc., which brings me to the conclusion that while it's too early for tier -II and -III cities to have a luxury hub, the readiness for luxury consumption is steadily growing.

Kalyan Kumar: In online shopping as well, we don't see much difference in the overall ticket values or price points of consumption in tier cities and metros. The number of consumers might be relatively low, but affordability is not at all a concern anymore.

Abhay Gupta: Since the last few decades, the Indian social hierarchy or the class structure has waned and suddenly money became the denominator of power and to show it you will have to indulge in luxury. There are people in India who have carried forward luxury from the erstwhile kings and queens, it's a lifestyle for them, but for the rest of us, it's a means of establishing power.

Mevin Murden: Tell me about the elite consumers, do they travel to shop or do they shop locally?

Dinaz Madhukar: Initially when we opened Emporio, there was always a doubt, because people were used to going abroad for shopping. There was also a doubt that India might be used as a dumping ground by the brands. But with the advent of social media everything changed. We have brands like Burberry live casting their walkways in Milan to the world,



so we know what is the latest trends. Also, there was a price disparity, despite the tax structure, etc., we always imagined that India was more expensive. But with all the changes that have happened, a fair amount of retail brands have told me that India is one of the lucrative markets as far as taxation is concerned. Prices of apparel and accessories were at par with Singapore, Dubai, etc.

Mevin Murden: Is the aspirational consumer in India now more educated to appreciate local craftsmanship or value of the local brands?

Dinaz Madhukar: India is one of the places where the local market has always been appreciated, which is very evident from the popularity of the ethnic category. Even in the non-ethnic segments, we have plenty of domestic brands that have been outstanding. These brands have put local craftsmanship, sustainability, etc., at the forefront and Indian consumers have embraced their products inspite of their premium prices.

Sachin Jain: The concept of luxury as a status symbol is gradually diluting, especially when you look at the millennials. And in two years time, one third of the country will be millennials so we better look at that segment, because it is a big consumer force in India. So luxury has now become an expression of oneself. These people trust the brands they consume and in some way want to associate themselves with them. So, it's really important for a brand to have a story, to mean something to the consumer today.

Mevin Murden: What does the Indian consumer look for in terms of luxury?

Abhay Gupta: I think it is the value proposition. I want to clarify that value doesn't always mean discounts. The customer wants to pay for the premium quality but also seeks value in terms of functionality, branding and customer service.

Mevin Murden: Do you think there is a challenge in terms of finding talent to deliver in store experience in India? Comparing store experiences in Paris, London, etc., is the retail sector in India at par when it comes to delivering store experiences?

Rajendra Kalkar: India is known for its inherent hospitality and I think Indian stores deliver much more than its international counterparts in terms of experience.

Dinaz Madhukar: For ever and more, we, in India, only had the entry level brands or brands like Louis Vuitton, there was nothing to bridge the gap, till very recently. It was a big task for a consumer to say jump from Zara to Versace, but now the brands like Kate Spade, Michael Korrs, etc., that bridge this gap and also make it easier for the consumer to graduate in terms of price. Also, earlier luxury was associated with brand recall, big logos to flaunt, which now is eventually waning. Also the millennial consumer is no longer dependent on family money but on themselves and at the same time they see it worth investing in themselves.

Mevin Murden: Would you say that the Indian consumer is brand loyal or are they brand switchers? Also, I have been told that Bollywood celebrities have a huge influence on fashion in India, is that true?

Rajendra Kalkar: Today's consumers have so many options that it solely depends on the brand what kind of experience it gives to the consumers

to make him come back, otherwise the consumer has plentiful avenues to go to. Celebrity endorsement is very popular in India, just like it is in other parts of the world and it will continue to influence fashion senses.

Sachin Jain: I want to add on the loyalty bit. I don't think loyalty is constant anymore. Consumers of today enjoy the liberty of going for things that they like and are comfortable with, not withstanding if its branded or not. So, if a brand thinks that they are happy with their set of loyal customers, I think the brand needs to re-question and rebuild.

Before the session concluded, Dinaz Madhukar responded to an audience query about real estate potentiality and luxury brands having the chance to expand beyond Delhi and Mumbai. "India is a special market. It's not going to be a market particularly for luxury. India is still going to be a two market zone for luxury, may be a third one in Hyderabad or Bengaluru - so it is one center in the South and two centers in Delhi and Mumbai. It's not going to grow beyond that atleast for the next 3 to 5 years. But it's a very steady market, both politically and economically, and that's why a lot of brands are now re-looking at India with interest.

Expressing on whether customisation will be at the core of the luxury space in India, Dinaz Madhukar shared that customisation has always been at the forefront of luxury brands, be it Corneliani, Giorgio Armani, Canali, et al. But customisation, atleast in India, is more predominant in men's wear as global colour palettes and sizes seldom match with the Indian tastes.

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MEGA CONSUMER INSIGHTS & INNOVATIONS

BY ROSY SHARMA



“Today, India is embracing technology like never before. Close to 500 million people have started accessing the internet in a meaningful way. Out of which, close to 300 million are accessing internet actively at least once every month.”

-Gunjan Soni,
Head, Jabong & CMO, Myntra

In the first consumer experience (CX) session at IFF 2018, Gunjan Soni, Head of Jabong and CMO of Myntra focused on understanding the online consumer and how within the online consumers’ mind fashion was getting repositioned due to the changes happening in the broader context in India. Sharing insights from the work at Myntra and Jabong, Soni highlighted key consumer insights related to ‘what people are buying online?’, ‘What is going to happen in the next 3 to 4 years in fashion?’ And on, ‘what the top trends in fashion will look like?’

The manifestation of mindset

Based on the research and observations at Myntra and Jabong, Soni shared that the country was evolving and the ‘mindset’ of the consumers manifests in the decisions they take in context of a broader cultural discourse. She elaborated that within India, there is now a resurgence of Bharat vis-a-vis India. This new emerging India is more about ‘me’ than ‘we’.

“Earlier, Indians, if put it in the context of the globe, were described as people who value family. Here, ‘we’ (a collective sell) is far more important than ‘me’ (an individualistic sell), she said. Citing an example, from a shopping behaviour perspective according to the mindset of Bharat, progressive shopping means being able to shop in a mall. While, for India, progressive shopping definition is to shop online. The ‘me’ segment represented universalism and inclusive-ness, which in the fashion context meant picking acceptable fashion.

The emergence of Gen-Z consumer

The rise of the new consumer class, the Gen-Z was another interesting facet of their observation. Why? The reason she shared is that the Gen-Z consumer is close to 600 million. Soni shares, “At that size it is actually 2X the size of the US population. And it is more than the size of Europe put together.”

She continued, “The era of the millennials is passe.” Comparing the two consumers – Millennials and Gen-Z – she said that the millennials grew up witnessing the rise of the internet and saw its power and embraced it. However, the Gen-Z are born in the age of the internet. “For them this is no new age thing that has emerged. For them, it has been there and it has a huge manifestation on how they approach and use technology,” she said. She further shared that for a lot of millennials the dominant choice of profession still continues to be a safe salaried job, while one could see the resurgence and the desire to be an entrepreneur among the Gen-Z. “There is a desire to become an entrepreneur, even if one is choosing a conventional job. Again from a mindset perspective a ‘safety net’ is not desirable, it is experimentation which is desirable,” she shared.

Technology: A great unifier

Today, India is embracing technology like never before. According to their observation, close to 500 million people have started accessing the internet in a meaningful way. Out of which, close to 300 million are accessing internet actively





at least once every month. “Even within this, a good 200 million are online transactors, which means they are making some transaction or the other, either by booking a ticket, purchasing a product or for other services online,” she highlighted. Among this group, the fashion shoppers were actually 60 million, who were doing repeat purchases.

Unveiling the Myntra fashion consumer segmentation research insights

“The number of people with mobile phone access in India today is actually larger than the number of people who have access to a hygienic toilet. And it is larger than the number of people who have access to a full brick-and-mortar houses,” shared Soni. These findings suggest a lot of changes and these changes are rightfully impacting the way fashion is getting consumed. Based on these findings, the research has highlighted nine segments, and the prominent ones are:

The urban trail blazer: This segment comprises consumers belonging to SEC A+, are working, affluent, located in urban areas (can be in a tier -I or -II). They are well travelled from a fashion preference perspective. They are the

ones who adopt luxury, branded fashion and are willing to experiment.

Urban value seeker: This segment is fairly large and very well represented online because this segment reacts to a lot of discounts and promotions that are made available. It comprises 40+ working men and women, more often in tier -II and -III cities but also present in tier-I cities. This consumer segment is very risk averse. They hold a strong preference for TV viewership and are very susceptible to the fake news syndrome. “Anything that they receive through SMS or Whatsapp, they tend to believe in and pass on,” said Soni.

Emerging fashion and category trends

• **Sustainable fashion and pride in heritage:** India will become the largest market for sustainable fashion by 2030. There is a large group among the consumers who are now willing and adopting sustainable fashion. At Myntra and Jabong, the online platform is witnessing a 3X rise in this segment.

• **Fast-fashion:** There is an increasing acceptance of designer-less fashion. Trends that are pulled from Artificial Intelligence and Machine Learning Powering. Consumers are adopting and get accustomed to these designs easily.

• **Active wear:** This category is becoming quite popular. It is among the dominant category in Myntra and Jabong, and about 60 percent of the sales is coming from tier-II markets. “Women consumers are the major contributor to this growth compared to men, who were previously the largest contributor to this growth,” said Soni.

• **Premium goes online:** The online is becoming an accepted destination for luxury shopping now. “We have seen now 4X growth in what we call premium price points. Even within that the acceptance of buying higher price points is increasing,” she shared.

• **Beauty and personal care:** Traditionally, beauty and personal care is not a big category for any online player but now seeing its exponential demand and growth, it is expected that this category will be among the largest growth category in the next 3 to 4 years (almost 1/3 of the overall market size of Myntra & Jabong).

• **Accessories:** Much like the beauty and personal care category, the accessories category is growing really fast. Soni said, “Interestingly, in the online shopping behaviour, it benefits itself as being a basket filler. It helps a shopper complete her look. Again for the trend setter segment, it is giving ‘me’ the individuality even while ‘me’ is conforming to her regular apparel.” She further explained as a marketer, it gives an opportunity to cross sell and up sell which is their prime focus.

“Every segment is growing, which is a good new. The fashion market in particular is moving towards achieving a 3.5X growth in the next 2 to 3 years, which means that almost 50 percent of the organised branded shopping within in the next 3 to 5 years will to happen online. Hence, the future is clearly very interesting,” concludes Soni.



TECHNOLOGY IN FASHION DESIGN

BY ROSY SHARMA



The presentation by Anurag Panganamamula, Senior Director at Rapid, highlighted the solutions to leverage data science and machine learning for generating unique insights for the brands.

Social media has captured great popularity and its implications are quite visible on the changing consumer views. Brands are no longer the place where a customer is looking for fashion, rather it is on Instagram, Pinterest, Facebook, and the e-commerce sites of the world. A customer is not just looking at what is there in his country but also checking bloggers, influencers and celebrity sites to consume fashion,” said Panganamamula. Today, the consumers display their preference in varied forms over these platforms such as sharing, liking, commenting, etc., on the fashion images. “The customers are expressing their choices in various different formats,” he emphasised.

“Technology innovations can help brands to track the shopping behaviour, browsing behaviour, etc., of more than millions of customers every month to understand what is trending.”

-Anurag Panganamamula,
Senior Director, Rapid

The blurring fashion season

The way fashion is created these days is no longer limited to fashion seasons. “You have so many seasons that the definition of season itself has blurred. Today, fashion means creating a constant stream of newness, where everyone wants to have the most fresh thing on the block,” he said. The implication of this is creating trends which are short lived. For a brand, it is important to understand what are these trends and to be able to react to it on time because this is what the consumer is looking for.

Fashion and Technology

In today’s fast paced changing market scenario, it is very important for brands to understand what is doing well and more importantly why is it doing well in order to understand and answer the customer preferences, and to understand whether they were doing the right thing for their customers or not. This is where technology comes in, for example, natural language processing, machine learning, etc., these things will help the brands create designs that can help them act in real time. “These things when used properly can help cut down the design lead-time from months to just few weeks and it also helps the designs to be more intelligent, as they are based on data and hard-facts and not on someone’s opinion,” he expressed.

Today, consumers are even ready to pay a premium to get trends on time. For this the brands should be able to understand all the trends along with the sense that why they are being talked and this can be done at scale by the machines. As a result, the brands will get real time trends from all the social media informations.

- **Natural Language Processing:** This technology helps in understanding and identifying fashion related words along with their right fashion sense. Unlike a normal google search, where one is looking for a dress and gets the result. This is very contextual. It is like a human being reading a fashion blog and making an





opinion on it. “If you are searching for a word like ‘flair’, you will not just find it but will also understand whether the flair is related to a hemline or a sleeve, whether we are talking about a dress or a top and whether people are talking about it in a positive or negative connotation,” he said.

- **Computer Vision:** This technology can filter copious amount of images and helps us to understand what kind of trends are prevailing. For example, through the image of a t-shirt we can tell its neckline, sleeve, print, etc.
- **Machine Learning:** After browsing through piles of data and images, a brand is left with an understanding to what will do good for it. Machine learning can help here by picking signals from various social media sites and e-commerce portals, by studying the likes, comments, shares or pins, whether style A is liked more than a particular style. “It can pick signals from the global e-commerce sales data, based on the assortment,

visibility and the kind of discounts they are offering,” he shared.

Rapid has been working with Myntra for the past 2 years and has helped them launch two new brands using these technologies.

- **Moda Rapido:** The apparel brand was launched in 2015. It is Myntra’s one of the most profitable niche brands. It is actually scaling at 200 percent growth y-o-y.
- **Here & Now:** This brand was launched 7 months ago and is experiencing phenomenal growth.

The two brand launches by Myntra have shown how insights when done well can deliver what kind of results. The insights can help a brand to achieve the attributes that are in isolation or a combination to understand the working of a particular design. He affirmed that these technology innovations can help brands to track the shopping behaviour, browsing behaviour, etc., of millions of

customers every month. “We scanned more than 14,000 social media portals, blogs, celebrity portals, to understand what is trending. At any point of time, we were tacking globally more than 4 million styles to create Moda Rapido and Here & Now. We delivered more than 1,200 styles every month with a team of 4 to 5 designers.”

The road ahead

Apart from helping brands in launching new styles and constantly learning and enriching its technological initiatives, Rapid is launching Vorta, which is an enterprising solution. This new technology has been developed for the brands and offers them insights on what will work for them and what are the areas they should focus on. Another initiation of Rapid is Curation, which will be launched soon. This technology given a particular design can predict whether it will do well for brands with the support of attributes and insight on that design.





MODERATOR:

1 **Rajesh Vishram Narkar**,
Vice President - Brand
Management, Myntra

PANELIST:

2 **Atul Bajaj**,
Executive Director,
Product, Merchandising
& Supply Chain, Puma
India

3 **Amit Kumar**,
COO, Globus

4 **Manohar Kamath**,
CXO & Head, Myntra
Fashion Brands

5 **Vijay Jain**,
Founder Director
& CEO, Orra

6 **Vinnnet Gautam**,
CEO, Bestseller India

THE PANEL DISCUSSION ON INNOVATION & INVENTION

BY ROSY SHARMA

As the millennial generation heads into maturity, retailers are striving to target its consumers to create a unique, personalized shopping experience. The impact of technology in retail is the biggest game-changer of all, with the current technologies affecting online and offline retail giants. New technologies reshape retail in interesting and unexpected ways. IFF 2018 previewed the technology trends that will dominate the retail landscape in 2018.

Moderator: Earlier technology had always been about products. It is now changing to a large extent and going beyond products. How do you see the role of technology in your business?

Atul Bajaj: Technology nowadays is not about whether it is useful or not. It is something that you need whether online or offline. This is because a consumer could be discovering a brand online, might be shopping with it offline and coming back to giving the feedback online. Today, the consumer is moving between online and offline very seamlessly. Hence, the brands have to ensure that they offer a very integrated experience to its consumers. And technology helps you do that.

So, whether it is about enabling the entire product catalogue by having a warehouse which could take care of both offline and online needs, or whether it is having a CRM program inter-linked with all the social sites, technology ensures that you are actually personalising what you are delivering to the consumer and offering them products which they would really need.

Technology is in all avenues of business and is not restricted to only products or e-commerce. Nowadays, technology is a brand experience because consumers are moving across channels and brands need to give them that experience and technology helps you do that.

Moderator: With regards to experiences between online and offline. How is technology affecting, in terms of Bestseller investing a lot more in store experiences?



Vineet Gautam: We are a brand for millennials and they are far ahead in technologies. So as a brand, it is our responsibility to ensure that our store experience and engagement across to them is equally enabled and a large part of that is how we treat customer in the store. For example, the technology today is able to identify a customer walking to a store and customize for him. This is something we try to do at our store in Pune with limited success as of now.

A customer does not want to go to one store and hear that this is not available and wait for the product to get it another day. With about 60 percent of our businesses coming from women who indulge in spontaneous purchase, it is now or never. And especially with e-commerce penetration they are having the largest catalogues available with them. We are trying to put a lot of technology in CRM, design, etc. In Asia we were the first to launch SAP CAR and HANA system, which allows us to capture what is happening now.

Moderator: How does a retailer look at technology especially of a multi fashion store?

Amit Kumar: For us technology is not just e-commerce or giving a product out to the consumers. It is connecting the dots and getting speed into every single aspect of operations from getting the feedback, involving the sales staff, etc, which is now getting technology enabled. The beauty of technology will enhance after getting all the insights on how fast we can convert it and get it on the floor.

Gathering the insights and getting all the knowledge is one thing but converting and giving it back to the

consumer when they are consuming fashion at the store is critical for us. Henceforth, our next investment will be towards driving technology in backend operations and in manufacturing that can help us get the products right in there.

Manohar Kamath: For Myntra, the vision is to democratise fashion through technology. For example, all of us know that getting customer insights and forecasting the right trends is extremely important for the success of any fashion brand. But the point is are we able to get it right every single time? How are we using technology to get that? Are we able to see a 360-degree view of the customer?

Look at the success of Moda Rapido and Here&Now, the brands that were launched through the technology developed by Rapid, which are the two brands that have been the most profitable and the fastest growing brands in the platform. Myntra fashion brand currently grows at 100 percent y-o-y because we are able to understand consumer insights through multiple data points. It says that the future will belong to those who not only think of technology but also look at executing it in every possible customer interaction.

Moderator: Jewellery is a very high value business. It is a different kind of business as it is not impulsive. Consumers plan and think it through and at the same time they want to see a lot of personalisation. How does a jewellery retailer deal with technology?

Vijay Jain: In the move towards mass customisation perhaps jewellery was the beginning point, as when a customer goes to a jeweller and gets a piece made for herself to a stage where the immediacy of gratification is very important. There are two most important things, the first being customer acquisition point of view where we micro segment the entire

consumer based on their preferences and taste. The other being on the supplier side where technology enables us not only to create pieces but do rendition which are life like. You can do a 360-degree of a piece, which appears very rich and see its implication from customer acquisition point of view. An average Orora store has 8 to 10 crores worth of inventory so for the jewellery industry in terms of cost and efficiency the implications are very very large.

Moderator: How does a global brand deal with the buy-ins in India, where it has its own fashion taste?

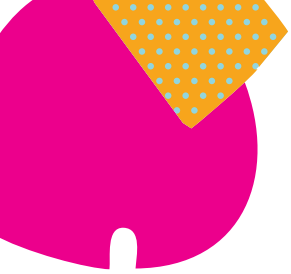
Vineet Gautam: It is about understanding the consumers. The buyers and merchandisers understand the consumers behaviour. We use artificial intelligence to predict those moodboards and see from our data, what will work and what will not work for us and according to that we pick trends for the Indian consumers.

Moderator: How does technology help to identify the right customer for a product?

Atul Bajaj: Technology gives out a broad idea of what works with a consumer and this varies from city to city. The final usage of the product can be gathered from the expertise which is developed over a period of time in the market and this is something technology does not give right now. Technology tells you what has a better chance of working, it helps to establish how much to buy. These expertise come from merchandiser and buyers since they have that data.

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Vineet Gautam: The buyers, merchandisers and designers act as enablers. They will guide you to take better and sharper decisions but at the end of the day someone will still have to take a gut call whether to do or not do.

Atul Bajaj: Technology helps to maximise the potential of a trend. However it does not necessarily let you establish a trend and that's where people are really critical.

Moderator: Technology brings in a lot of efficiency in businesses and business processes. How does the pool of data and the customer metrics help an online retailer to create the selection of brands especially for those consumers who are about 'me'?

Manohar Kamath: Most of the time the big data pool is useful only if you are able to draw actionable insights from them otherwise these data are just junk. For example, if I am looking for a particular kind of jasprin t-shirt which is successful amongst the t-shirt trend. I will try to understand whether it is capturing 2 percent of the entire t-shirt trend or there is another design aspect which is a global hit. In the case of Myntra, a designer becomes 5 times more productive than he would be working for any other brand. We are churning out close to 2,000 options every single week and we are managing this with just 84 days of an inventory. The key reason or differentiator why we are able to achieve that is because of the focus on getting technology to do the work and making everyone's role within Myntra more productive.



Moderator: If I talk about Orra, how would I gain from technology?

Vijay Jain: There are two things, one is a macro trait, that is if a customer walks in to an Orra store 70 percent of the times the customers buy a ring first. The next purchase is an earring, which generally happens within six months of the first purchase. Now, what about the rest 30 percent customers? What are they likely to buy? The age group they are in? Which city? We have noticed that as you try to find the answers to these questions and in the process you slice and slice the data and reach the nth customer, the analysis becomes more and more intense. So, when you follow a micro trend you can know that which customer is likely going to pick a platinum brand next and when you show it to them online or offline your ability to convert that customer increases immensely.

Moderator: How are you changing or enabling technology to talk to customer at your stores to create brand stories?

Vineet Gautam: We have tried a little bit of technology, especially target marketing but not too much analytics

has gone in. I think a large part of our front-end staff have to be enabled with technology to understand who is walking in. I think it is the way forward, especially with so much personalisation that is available online, soon the consumers will start expecting that from offline too.

Moderator: Many of you find confluence in music, celebrities, etc., and it takes the brand story differently and do it all digitally. How is it different in India? Are you connecting to a completely new audience which is not in store for you?

Atul Bajaj: We have had great success globally with music and the creeper which we launched with Rihanna. It was a success globally and within 2-minutes the collection was sold out. With platforms like Instagram in India what you can do is that you can have a very focused target towards the right consumers. What happens at the store level is that you can micro segment your store. However, there is a varied kind of crowd which comes into your store



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“Technology nowadays is not about whether it is useful or not. It is something that you need whether online or offline. Today, the consumer is moving between online and offline very seamlessly. Hence, the brands have to ensure that they offer a very integrated experience to its consumers. And technology helps you do that.”

-Atul Bajaj,
ED - Product, Merchandising &
Supply Chain, Puma India

to come to the store and pick up the look. And about 7 to 8 percent of the customers who bid online came to the stores and picked up the products. Such is the power of social media that consumers were actually coming to the store and buying, we were able to convert it to some real time sales.

Moderator: Do you think brand stories will move towards the normal media such as print, TV, etc., to get the point across or the stories being told on digital will keep working?

Manohar Kamath: We have to understand who the customer is. And if the core of my customer is Gen Z and millennials then we have to use the medium, which the customer is using. I have to pick the engagement that he is comfortable with rather than me trying to impose upon a medium that I am comfortable with. As you said personalisation is the biggest bet and we are in a much better position to do so because of the kind of data that is available to us. We use the cohort analysis extremely well to understand our target. In fact we used 1 lakh videos meant for various kind of customer types, the content or the communication that is going to be consumed by each cohort or each customer type is going to be very specific.



and you then many times as a brand have to try and satisfy multiple kinds of consumers from the same store, which means that there are some parts of a store which the consumer would like and some parts he will not be able to relate with. When you use social media such as Instagram you are actually targeting the specific consumer with a specific look and if they can relate to it then it immediately converts into sales and that's what we have seen in India as well.

Moderator: We see Instagram to be the new predictive engine for fashion. Telling stories is now becoming different, what is the take of Orora on this?

Vijay Jain: I think one of the big changes that is happening globally is that we have moved from a text-based world to a virtual world. Social media plays a very important role and through this medium you can get word-of-

mouth multiplied. For example, we did a fashion event at a store. It was confined to that store but when I live telecast it through technology at a cost which is virtually zero, it not only made the store engaging but also made our customers be a part of it.

Women at weddings and for functions like sangeet and reception prefer to buy real jewellery. So, the jewellery market is exploding with specialists who provide specific offerings. For instance, when offering necklaces we display them as cocktail necklaces. As a result the ability to read designs and trends become very important both online and offline.

Moderator: How are you connecting to the younger audience especially to the 'me' consumers?

Amit Kumar: We have just started driving our communications on social media. There is still a long way to go from here. Recently during Valentine's day we did a campaign on social media. We had created 11 different looks for the consumers to bid at a certain price. We were enthralled to see the kind of response we got. People who came online for the auction were prompted

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WOOL IN SPORTS



WOOLMARK WORKSHOP

WOOL INNOVATION FOR SPORTSWEAR AND ACTIVEWEAR

BY SHIVAM GAUTOM

An in-depth look into the unique properties of wool as a natural, renewable and biodegradable fiber suitable for sports and athleisure wear.

The Woolmark Workshop at IFF 2018 aimed to provide an in-depth look into the unique properties of wool as a natural, renewable and biodegradable fiber suitable for sports and athleisure wear. Rajesh Behl, Consultant, Australian Wool Innovation, started the session with a presentation that outlined the background of the Australian Wool Innovation - which owns The Woolmark Company and why wool is fast emerging as the numero uno choice of sportswear brands around the world. "The Australian Wool Company is owned by about 50,000 wool growers, who are the main share holders. They give us the funds to spend in activities like education, marketing and research and development, both on farm and off farm," he revealed.

50,000 wool growers manage 73 million sheep and gives the world about 325 million kgs of raw wool, which is good enough for about 90 percent of the global consumption of wool for fine suitings, sweaters, sportswear, etc. Of the total production, about 80 percent is exported to China. Around 8 percent comes by

volume to India. It has also to be noted that wool constitutes about 1.2 percent of the total consumption of fibers in the world, by volume.

Bahl showcased a video outlining the properties and salient features of the wool fiber and its benefits, and how the industry utilises these benefits to shell out unique and innovative products to the consumer. Wool is a all season fiber that is natural biodegradable and renewable, and is extremely soft, elastic, breathable, static resistant, stain resistant, anti wrinkle, odour resistant, UV resistant, has extreme moisture management properties, et all. Wool bedding and sleepwear appear to promote a better night's sleep, and fine wool knitwear can assist people that suffer from particular types of skin conditions. Wool can also be used in its pure form or mixed with other natural fibers like cashmere, camel hair, Angora or synthetic fibers and is hence increasingly being used for apparel, interior wares and other products today.

Wool is an all season fiber and the fact that it is made of the same protein which our body hair are made of rebuffs the general assumption that wool can be prickly. "It's just the choice and composition of the finer in the product that makes it prickly. A micron lesser than 18 can very well be used for next to skin garments. Brands like Icebreaker are making women's underwear from wool. Sportswear majors like Under Armour also is increasingly turning to wool to make next to skin garment," he added.

Wool's moisture management property is one of the foremost reasons why it has now been increasingly used by sportswear brands. Coupled with other benefits like breathability, odour management and comfort it has emerged as one of the most appropriate fiber for sports wear. Wool also is a

durable fiber; although not very strong, it is highly extensible fiber. Whenever there is a stress or strain, the fiber extends itself which passes on the stress and strain to the next point, and the process goes on preventing the fabric from tearing.

"Another mountaineering brand has used three layers of wool. There is the base layer next to skin followed by the mid layer and outer layer which forms a sound arrangement that seamlessly retains body temperature, lets perspiration to go through and resists wind and rain. In another technological innovation, the fiber was stretched by more than 30 percent, open weaved and after it comes out of the finishing bath, it is allowed to relax. When that fabric relaxes, it contracts by 30 percent and an additional 10 percent contraction takes place because of its open weave construction. The end result is a fabric that doesn't let either rain or air to penetrate but the fabric is highly breathable and machine washable without chemical treatment," Bahl expressed.

Sportswear Partnership

The momentum of brands choosing wool in performance apparel is gradually gaining pace. An indication of the degree to which wool is now appreciated by the outdoor and sports trade is evident by the name of brands that have partnered with The Woolmark Company. "We have created a slew of products with adidas. We have seamless half zipped sweaters (in collaboration with Stoll, men's and women's wool blended running shirts and ultra boost shoe is wool," he added. Other brands that have partnered with The Woolmark Company include, Stone Island, Woolrich, Devold, super. natural, Helly Hansen, et all. "This is just to give you an idea about how wool is being adopted by more and more sportswear brands around the globe," Bahl concluded.

Commercialisation of Wool

Jaspreet Chandok, VP and Head - Fashion, IMG Reliance, took the stage next, to brief the congregation a retailers perspective on why a product should be adopted. "Retailers today are looking at how they can differentiate; ultimately the only measure of your success is your profit. There are various ways to create a differentiation - from a brand perspective, through retail experiences, and most importantly, through your products. The product is the most important aspect, especially today with thousands of options available, and it is imperative for any retailer to create a product that can differentiate," he added.

From a retailers perspective, the fact that wool can provide the value in the product itself is a big plus -- it lets the retailer to up sell the product and premiumize it. "If you can add value to a product by innovations in the fabric, that makes all the difference for a fashion retailer - the sales per square feet go up and the consumer has better chances of coming back. My opinion is that the luxury segment is already acquainted with the edges of wool as a beneficial fabric. The tipping point for wool is in the premium segment, and this is where the volume is. If you can provide products in this segment whose value outpaces the price it will make a huge difference. Another reason of our association with The Woolmark Company is the sustainability credentials. While there is sustainability from the fiber's perspective there also is work that needs to be done towards, promoting it, taking care of all the stakeholders in the value chain," he add.

To a retailer, summarized Jaspreet Chandok, it's genuinely a business imperative to create value for the consumer, who will create value for the organisation.





PANEL:

(Left to right)

- 1 Atul Madan,
Director - Retail, SSIPL
- 2 Gautam Saraogi,
CEO, Go Colors
- 3 Sandeep Kapoor,
CMD, Shree
- 4 Vineet Gautam,
CEO, Bestseller India
- 5 Lalit Agarwal,
CMD, V-Mart
- 6 Rajesh Kadam,
COO, Inc 5
- 7 Sanjay Vakharia,
Director & COO,
Spykar Lifestyles
- 8 Unmed Singh,
Head Marketing, ITC-
LRBD

CUTTING THROUGH THE HYPE: A CUSTOMER-CENTRIC APPROACH TO OMNICHANNEL TRANSFORMATION

BY SHIVAM GAUTOM

ARVIND internet

In contemporary times, an omni-channel approach is indispensable for any retail business. Getting the 'one-customer one-brand' view is the elusive Holy Grail that a brand should look for, and surely by using technology. Featuring insights from the pioneers of omni-channel retailing in India, this session aimed to help CIOs and CEOs rethink the impact of digital transformation.

The session started with a presentation by Mukul Bafana, highlighting the first principles approach to omni-channel transformation. "When we start talking to brand partners and retailers, a few things come up. One of them is noise - there is a lot of hype around omni-channel retail," he said.

The main job of brands and retailers is to satisfy the core needs of their customers - most effectively. A fashion consumer has a set of about 10-12 core needs including, their budget needs, inspiration driven needs, gifting needs, etc., that account for a majority of the reasons why they shop. It is the job of brands and retailers to help solve these needs and provide the customer with Access, Assortment and Convenience - the core value propositions for the consumer. So the question now is, what does omni-channel do better? Omni-channel, practically, offers the best of these propositions. "In terms of access, we all want unbridled access. A guy in Guwahati should have access to the same things as a guy in Mumbai. What a consumer wants today is unadulterated access with relevant assortment and seamless convenience. This is where omni-channel can make a difference," he added. There are many broken consumer journeys in organised retail. The jargon broken journey refers to the confusions

**ANCHOR:**

Mukul Bafana, CEO, Arvind Internet

“The main job of brands and retailers is to satisfy the core needs of their customers - most effectively. It is the job of brands and retailers to provide the customer with Access, Assortment and Convenience - the core value proposition for the consumer.”

created for the customer by the end number of touch points available in retail today. “The thought is that we give the consumer the hardware but forget to give them the software, we forget the shopping logic at times. There are tons of these broken journeys that omni-channel can bridge better - it helps in going down the purchase funnel in an easier manner,” Bafana stated.

The Approach: Design Around the Consumer

Consumers do not care about channels and it is imperative for every brand and retailer to design their approach around their consumers’ needs. Bafana said, “This is the first design principle to keep in mind. The second principle is, don’t start with technological features, let’s concentrate on customers’ needs, the effective journeys to sole those needs, and what technologies can power these journeys. This order is important as the sequencing matters a lot. Start with hygiene needs of the consumer, get those solved and enable them to think about shopping in a smarter way and then go about creating more second and third order journeys that create more and more value for them.”

Talking about Arvind Retail’s modus operandi, Bafana added, “The way we bring this together, when we work with our brand partners, is by giving them a playbook. We advise that at the base, offer one store to your consumer, which will ensure that your inventory, channels and orders are seamless and convenient and you are providing your customer – unadulterated access. Then we start tackling the end-to-end journeys, and do mend things like broken journeys. The third step is when we start making this entire ecosystem much more relevant to you as a consumer base, using analytics to drive relevance in the assortment.

Arvind Internet is India’s largest omni-channel enablement company and works with a slew of leading brands and retailers in India to power their end-to-end omni-channel journeys. The company works both on the technology stack and the supporting services required to ensure that brand’s and retailer’s can successfully implement seamless omni-channel services for their consumers. Arvind Internet is working across 2,500 stores and 40+ brands.

PANEL DISCUSSION

Anchor Mukul Bafana started the session with a very simple question to the panelists – **the basic principles as to why the panelists started their omni-channel strategies.**

Unmed Singh: Omni-channel is more a business need than a customer’s need. Omni-channel enables us to give the consumer a great experience, which is the need of the hour in retail today. It’s a great tool to fulfil customer’s needs and ensure that they get what they came to the store for.

Rajesh Kadam: Along with the experience part, I want to add how it helps looking at the inventory and putting it on all the different channels. So for me, it’s both the experience and inventory management.

Lalit Agarwal: The landscape has really changed today. The millennials are always strapped for time -- they want everything instantly. So, I think it’s more on the convenience side, especially with the rapid penetration of digitisation. From a consumer point of view, a consumer witnesses a said product in media advertisement and wants to get it immediately. Especially for my target consumer, which are small town people who shop twice or thrice a year. So, omni-channel helps the consumer to atleast block the product.

Gautam Saraogi: Even if we do the best replenishment, we cannot have every colour and size on a said day. So when a customer cannot get what he wants, he goes to our competitor. Omni-channel has helped us to convert such consumers into online consumers. It’s a win-win situation for both the consumer and us.



Sandeep Kapoor: We manufacture about 120 styles every month but our stores aren't big enough to stock all of them, so now it can be shifted to other stores or the warehouse or market place warehouse, making it great for both us and the consumer.

Atul Madan: As a retailer, one of the underlying fundamentals for us is to enhance customer satisfaction. Omni-channel not only helps retain consumers by helping them with products that are not present at a physical store but also helps to increase consumer delight.

Vineet Gautam: The only thing that the customer cares is if the catalogue is complete or not, not the channel of sale. Our thought process is wherever the consumer is, we need to give them our entire catalogue. As of now, our only focus is catalogue completion and ensure that wherever the consumer is, be it a small town or city, online or offline, they see the same catalogue and same prices, so that the consumer experience across channels remain equal.

Moderator: Keeping these first principles in mind, what kind of challenges do you face even if you remain true to providing better access to assortment means to your customer?

Lalit Agarwal: I think it is all about customer education and standardization of the products which will result in the consumer trusting the brand or a product.

Atul Madan: From a consumer point, I think the timing thing could be a little annoying. I mean, omni-channel can surely help identify and get a product sourced for a consumer, it cannot guarantee instant delivery. Also, as far as the true omni-channel is concerned, I think, operations still are a hindrance.

Moderator: If you look at the ecosystem, trying to provide access, convenience, and assortment, almost everyone is trying to do the same thing now. And some of these are your partners or channel partners, so how do you balance it?

Vineet Gautam: From a consumer point, it depends on where the consumer is. If the consumer is at my store I am sure I will do it much better than an online guy. Also if the consumer is buying online, from a partner site and not mine, although I will lose a part of it I will ensure that the consumer is buying there. Basically, where the consumer buys is not a concern, as long as the stock is liquidating and we are giving the customer a good experience.

Moderator: With this whole omni-channel thing, are we too ahead of the curve where we are like focusing on too niche a market? I mean, are there takers for omni-channel or is it that it's just us who is pushing it really hard?

Unmed Singh: I don't think we are ahead of the curve. Consumers hardly have time today and technology is aiding them to use time very effectively. As a consumer, I just want my need to be fulfilled in the least time possible and if omni-channel can help me fulfil my need, I will definitely embrace it. Also, it allows fashion businesses to utilise the inventory better.

Sanjay Vakharia: Earlier, when there was just one channel of sales, if a store didn't have something that the consumer wanted, they would source it for him within a said time. We are doing the same with omni-channel, and considering this sales template, we are not ahead of the curve, it's just that the tolls are different but the latent demand of serving the consumer is still the same.

Lalit Agarwal: It majorly depends on the cities you are shopping, in my opinion. But considering the "Real

Indian" scene, I think most customers are yet to be acquainted with the modus operandi of omni-channel. So there is time till the consumer understands it and uses it as a convenience.

Moderator: We all believe that there are certain core needs we want to fulfil for our consumers. Are the needs effectively changing and is omni-channel a better approach to adapt to these evolving needs?

Vineet Gautam: The consumer is evolving much faster than we think and even if we do not want it they will push us for it. And in fashion, majority of the trends are forecasted not customer demanded. I agree with the "Real Indian" scene but in the metros and major cities people are very demanding, if we do not have a size then he will ask us to send it over to his home. End of the day, it will help improve business and also aid in customer delight, so if need be we need to push the entire approach of omni-channel till it catches up with the consumer and the pull begins to emerge.

Moderator: Are we, as an industry, being thoughtful enough and helping the consumer connect the dots? Today, are we really creating more shopping logic or are we providing more broken journeys because of the access we provide the consumer?

Vineet Gautam: Each brand will have its own journey because their respective customer promises and journeys are so very different. I think, the aim is to create more convenience, and to make things simple for the consumer. Let us make it simple so that consumers can search for a brand or a product and they can buy it through any channel preferred. Because at end of the day the consumer is king and they decide what and how to shop. Let us allow the customer to make the right decision and we shall give them the best platform, logistics ,etc.





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Splash

IN LOVE WITH FASHION

25 years of Splashing fashion

Splash celebrated an evening full of fashion, glamour and joy to mark its 25 years in the fashion business. The high-on-fashion event was held on the first day of the 2-day mega fashion event, India Fashion Forum 2018. Several prominent names from Bollywood and the fashion fraternity attended the fun filled celebration, which included a glittering fashion show with models sashaying the latest Spring Summer collection.

Headquartered in Dubai, Splash is the Middle East's largest fast fashion retailer and part of the Landmark Group, one of the biggest retail conglomerates in the Middle East, India and Africa. Founded in 1993 as a single brand store in Sharjah, Splash currently operates over 220 stores and 55 brand stores (Lee Cooper, Bossini, Kappa, etc.) across 14 countries.

Showcasing popular collections for men, women and teens, Splash's existing product portfolio includes a uni-brand concept across its stores providing a comfortable and easy shopping environment. The brand celebrates fashion in its true sense with its tagline 'In Love with Fashion'.

As a brand, Splash believes in constantly being a trend-setter in the region and has successfully created some of the biggest and most popular brand properties like the bi-annual fashion shows, the annual calendar launches which have now become part of the social calendar of the region. With constant revamping of the marketing portfolio, newer forms of communication are added and channeled to keep the consumer involved.









EXUBERATING FASHION SHOW

Deal Jeans, a fast fashion women's western wear brand showcased a glimpse of what's in trend this season and put the audiences through an enchanting fashion redefining walk. The fashion show was full of energy, there was excitement among the audiences and the collection was cheerfully displayed by the models on the latest Deal Jeans' collection. The brand presented its latest collection 'Summer Chaos' - take a stylish escape, and displayed style and high fashion to the fullest. The trends customised with blend of floral prints, Scottish checks and gingham were the highlights of the collection.

At the fashion show, Deal Jeans showed a glimpse of the brand's collection from the newly launched exclusive store in Ludhiana (Ghumar Mandi). Spread across 1,600 sq.ft., the store sold an average of 2,346 apparels on the very first day itself and clocked a whopping ₹50 lakh sales on its maiden sale at the store.





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FASHION RETAIL QUIZ WITH SIDDHARTH BASU

BY ROSY SHARMA

The fashion retail quiz show by Siddharth Basu at the India Fashion Forum 2018 was a very popular event. It took place on the second day of the two-day event and received a great participation from teams. The teams were tested for their knowledge and passion of fashion and on retail businesses, the profession they are in.

The participating teams were Adidas (team members: Madhur Sharma, Amrith Gopinath, Sushil Gopinath and Rohan), Bestseller (team members: Nisha Pokle, Gaurav Sachdeva, Vivek Rastogi and Ruchi Kamar), Fila (Sushil Vyas, Chitrangad Bareja and Shardul Barke), Infiniti (Ashish Bhandari, Rohit Kaul, Arvind Singh, Gaurav Balani & Rahul Tuli), Inorbit (Radhika Iyer, Seema Jain, Geeta Khatri, Kshitija Verenkar and Rupali), TCNS-W, Wishful & Aurelia (Shibu Kuttan, Pranal Sawant and Devender Singh), Tommy Hilfiger & Calvin Klein (Shrirangan, Simran, Punit, Amaarjeet and Sabia).

Moreover, the winner of the quiz show took home gift vouchers worth ₹75,000 and shades from Lenskart. The first and second runners up team got gift vouchers worth ₹60,000 and ₹50,000 respectively. In fact, all the participating teams got gift vouchers worth ₹20,000 each.

After multiple rounds of entertaining and engaging questions related to fashion and retail businesses from India and abroad, team Adidas took the first position, team Fila was the first runners up and team Bestseller took the second runners up positions.



4th Edition
FASHION CONNECT
South India Garment Expo

28, 29, 30 June 2018

The Lalit Ashok, Bangalore, India

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EXHIBITOR PROFILE

Apparel brands from across the men's, women's and kid's wear segments who wish to reach the ever growing retail sector of south India comprising primarily States of Karnataka, Tamil Nadu, Andhra Pradesh, Telangana and Kerala.

VISTOR PROFILE

Conventional retailers including large format multi-brand chain stores, department stores, specialty stores; wholesalers, distributors, buying houses & agents, online retailers.

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MODERATOR:

BS Nagesh,
Founder, TRRAIN

CO-MODERATOR:

Ganesh Subramanian,
CEO, Stylumia

PANELISTS

Atul Bajaj,
ED - Product,
Merchandising &
Supply Chain, Puma

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

Anil Shankar,
CCA & VP-IT, Shoppers
Stop

Piyush Chowhan,
CIO, Arvind Lifestyle
Brands

Satyen P Momaya,
CEO, Celio India

Gautam Kotamraju,
Business Head, Cult
Gear

Sugam Asani,
Brand Head- Jack &
Jones

Amit Chaudhary,
Co-Founder, Lenskart

Rajesh Jain,
MD & CEO, Lacoste
India

Preeti Gupta,
COO, Enamor

Julie Woodhead,
Former Buying Head
Arcadia Group, House
of Fraser

Kunal Mehta,
President, The
Mandhana Retail
Ventures (Being
Human)

Aju Antony,
CEO, Prestige Fashions

WINNING IN FASHION WITH INTELLIGENCE



BY GURBIR SINGH GULATI

The CX panel discussion at IFF 2018 addressed several critical questions like:

What does intelligence mean? How do brands and retailers get to understand the consumer's pulse 24/7? Global vs Local vs. Real-Time, how does this pan out? How can insights be made actionable? Do traditional research techniques hold good in the real-time context? How will marketing respond to this? What would be the next wave of product development? How can technology enable this? What does it take in terms of people, skills and culture?

Excerpts from the panel discussion:

Moderator, BS Nagesh: We are looking at personalisation, assortments and towards making spring summer and autumn winter seasons into multiple drops. How can we do this?

Anil Shankar: We, as an organisation, are ensuring that we should be one step ahead in giving personalized behavior to our customers. This is done by training our sales associates on product knowledge and understanding the customers' needs. We have also noted that many of the customers are willing to share personal information and we have created a Whatsapp group where a lot of product information is shared. This group involves a lot of customer's feedback on our products. The moral of this story is that it shows how technology interventions can actually enhance customer's experience and give tremendous benefit to the business.

Satyen P Momaya: For me it's about to keep focusing on building a foundation for each end and use technology to support all of the strategic objectives.

Amit Chaudhary: I can share some data as we were born online and then wanted to open brick and mortar stores. So if we were doing some 100 orders of business through a particular store, then out of this some 40 orders were from the customers who actually have downloaded our app for the first time. Also these customers are the one have actually done a 3D trial on the app, shown the look to their friends and have come to the stores for their eye checkup and made a final transaction. This clearly shows how technology can boost omni-channel business and transactions.



Atul Bajaj: We are doing a very interesting pilot run. For example if my store is at Linking Road, Mumbai and you are my customer and are looking around for a specific running shoe, then you will really get a very valid communication from us specifying a very interesting product which we have launched and matches your need. This links the customer and the store together. This may sound futuristic but that technology is already available.

Kunal Mehta: Human intelligence and research helps me in serving the customers better. We have a digital LCD screen in our store which actually helps in enhancing customer's experience. This screen help them to mix-and-match denims which they have selected with a t-shirt. This screen also helps to WhatsApp the images; wherein the customers can send pictures directly to their friends for suggestions. This has actually helped us grow our business by 10 percent.

Piyush Chowhan: Personalization, as a concept, cannot be served on the first day which is the fundamental belief that we are working with. We have to first understand the journey, learn from it and collect the data and then offer notifications based on individual recommendations. For us technology means where the customer data in

terms of fits and sizes are linked to our POS. This has actually worked for us where a customer can be guided on her fits and recommendations, based on the choices made in her last purchase. Nevertheless we are working with a startup who is helping us with a model wherein a woman identifying her fits and personality and can match quickly with our products available.

Co Moderator: Ganesh Subramanian, CEO, Stylumia: Technology can solve problems without asking for data and without getting into the personal space of a customer. So for example if a lady customer enters your store, your entry camera can click her picture and map it with the data in your store. This will give a clear example as to who the customer is and has she shopped in the past with your brand. This integration not only gives her profile but also links us with all the past consumption of the products with the brand. Nevertheless this mapping also gives an understanding of what the consumer is wearing, what are the latest trends and what he has now come to shop. This analytics put together can also give a lot of key insights to the merchandising department of a brand. The most important point for a retailer today is to understand the customer deeper by gathering small data analytics.

Moderator: We as retailers keep talking about the conversion ratio of 35 to 45 percent in our stores never thinking what about the 55 percent. This 55 percent people came to the store and leave without shopping. What are we doing to capture this loss off sale data analytics?

Atul Bajaj: We always discuss on proving the point that the customer knows what he wants. But a lot of times this is not true! Rather the customer is reacting to what you are throwing at him. So most of the time goes in studying what the consumer is buying and not buying. There is hardly any time given to understand what the consumer needs and what his/her behaviour is

reflecting. So the point given is very relevant and we should start focusing on consumer behaviour rather than just working on what is selling and what is not.

Satyen P Momaya: This is with regards to one more study; the customer who came to our store and did not make a purchase because of two simple reasons - he did not like the fit or he did not find the range what he was looking for. Second thing which we observed out of the retail staff behaviour is that they were keener to service the male customer as his buying decision was quicker than compared to a female customer. So we addressed all these and incentivized the staff to get the conversion ratio higher with both the genders of customers coming to our stores.

Gautam Kotamraju: The customer remains at the center of whatever we do. Even when we offer personalization at the stores, it do not show up. So we need to look at how to react to this and how one can use technology to give better personalization. Overall it is all about making a great experience out of consumer's presence.

Aju Antony: I had a situation where a customer has never heard about your brand or your product then what kind of diligence will you use to attract him to come to your store.

Julie Woodhead: I think it is a very straight forward answer. Whatever you have decided to sell to the customers keep the overall approach very simple.

Panel Discussion Summary: *Fashion Intelligence is all about education, personalization, gathering small data analytics, usage of technology, passing the communication to the complete fashion chain, training your staff to understand the consumer needs to inspire consumers based on the social impact of fashion choices available today.*



FASHION LICENSING DRIVING GROWTH GLOBALLY AND IN INDIA

BY GURBIR SINGH GULATI



In light of the rising importance of the subject, IFF 2018 hosted an eminent panel of international and domestic luminaries drawn from licensing, fashion and retail, sharing their views and insights on key trends, synergies and how licensing can enhance the fashion business. **Insight Partner - The International Licensing Industry Merchandisers' Association (LIMA)**



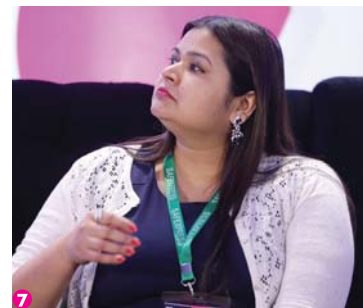
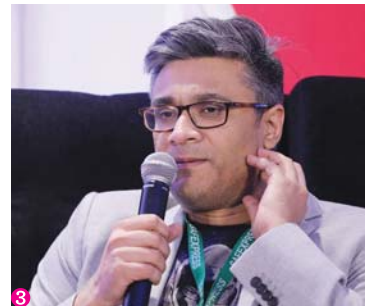
"Fast fashion in particular is more of a trend than a way of life these days. What we are particularly seeing that the consumer is looking for an experience with engagement at the retail level, a quality product and something which they can feel good about. And the way to get there is through smart brand licensing."

-Maura Regan,
Executive Vice President, LIMA

Maura Regan, Executive Vice President, LIMA, in her opening statement said, "I am particularly excited about licensing because I see it as an industry that drives growth both locally in the countries as well as on a global scale. There has been a lot of discussion on how to drive growth and how to engage the consumers and alternatively how to drive revenue for all our business partners. When you are thinking on these lines, it's very important to realize the value of 'Brand Licensing' as a business model. There is not a single less risky way to get into differentiating your product category to the consumer other than with brand licensing. Here you are investing into something at a very low risk level with somebody who has spent many years in developing a brand. So it's less risky for one to enter through the brand licensing way. You must know that market capitalisation of most companies is driven by brand recognition. Fashion in particular takes a lot of advantage of brand licensing. You have examples of fashion majors like Tommy Hilfiger, Calvin Klein, etc., which were the early adopters in the brand licensing industry. All of these companies are using smart licensing and delivering good revenue to their companies' bottom lines. Some of the other trends which were seen across the board in licensing were particularly the consumer buying patterns from online to offline where it is largely driven by the recognition of brand licensing. Another big trend which was also seen is what I call "follow the thread"; we want you to look good, feel good and do good. This means that the consumers also want to know what they are wearing; where it is produced, how it is produced or is it sustainable as modern consumers are conscious of what they wear. Fashion is an expression of lifestyle with a drive and hope that you belong to. Fast fashion in particular is more of a trend than a way of life these days. What we are particularly seeing that the consumer is looking for an experience with engagement at the retail level, a quality product and something which they can feel good about. And the way to get there is through smart brand licensing."



KIVON  SHIRTS



PANEL DISCUSSION

MODERATOR:

1 **Jiggy George**,
Head, LIMA India
and Founder & CEO,
Dream Theatre

PANELISTS

2 **Nicolas Loufrani**,
CEO, Smiley Company

3 **Sanjeet Mehta**,
ED & Head - Disney
Consumer Products-
The Walt Disney
Company

4 **Vivek Bali**,
COO, Sephora India
at Arvind Lifestyle
Brands Ltd

5 **Girish Kumar**,
Trading Head,
Shoppers Stop

6 **Rajesh Narkar**,
Brand Director/VP,
Myntra Fashion Brands

7 **Shweta Pandey**,
Director Counsel,
Head Legal & Member,
Board of Directors

Kicking off the session, Jiggy George said, “We have had a very interesting licensee phase in India. There are three things which are very important for this industry to grow exponentially, out of which two things that work in India phenomenally well is that we have a consuming class and our niches are very large and second is that people have an understanding of the brands. The third stuff which is really not intersecting is retail. Organised retail is exceptionally small in India. There has been a great disruption from the perspective of e-commerce which has increased the consumption ratio. Offline retail is growing but not at the pace we in the world of licensing would like to see.”

Moderator: We are great users of Disney’s content. Why is the numero uno entertainment company in the world so obsessed with fashion?

Sanjeet Mehta: Fashion is one of the biggest categories not just in India but globally. If I look at the success of Disney in the fashion segment – it boils down to two major factors. One is that fashion has been moving from just being centered on product design to storytelling where, Disney fits in so wonderfully. The other aspect is product design which resonates and goes very well with every product category in fashion. We have fashion across all age categories right from Mickey which has different art styles for different age groups i.e. infants, kids, youth and adults.

Moderator: When it comes to storytelling, it resembles well with a brand like Smiley which is seen everywhere from mobiles to newspaper. So is Smiley a character or a fashion brand. Secondly how successful have you been around the world from a fashion perspective?

Nicolas Loufrani: Smiley is a fashion brand and is still not recognised just as a character. It was my decision to make it a fashion brand as this is a huge canvas. I have a fashion background and in my studio in London we think on the creative lines of fashion for Smiley. Licensing is not a buy and sell model. Licensing is a partnership between the licensor and the licensee. Each side is bringing something to the table. As a licensor we bring along the history, brand value, and knowledge of our brand and it’s copyright. And on the other hand the licensee is bringing the product developers, manufacturing, the retailers and logistics.



Moderator: What is the value proposition which is really required for a license to work?

Vivek Bali: On behalf of Arvind I would say, firstly, it is the strength of the brands and then the strength of Arvind to take this further into distribution and build the brand. So the brand proposition has to be very strong. We have to see how successful they have been globally, how they have marketed the brand, what type of customers they have targeted around which segments, and finally what are the market spends which these brands might do while we would spend to create assets for them and localise it. I think Arvind has the strength in terms of speciality manufacturing and the economies of scale to deliver a price and distribute the brand across the length and breadth of this country.

Moderator: When it comes to brands and characters which amplify by way of entertainment, how does it validate as pure fashion play in retail? Does it work or not?

Rajesh Narkar: Being in e-commerce, we reach far more customers than traditional retail. We clearly figure out if there are any white spaces available in the first go. Everything that we do in the fashion space with our private labels and brand licensing, we look at the proposition and who are the consumers. Putting consumers at the center, we figure out if there are more likely brands in this space itself and whether they are in India or global. Post

this we figure out a partnership model. The final part which we look at is the scale. Myntra today has 30 million customers on sites every month. Within this you have certain amount of retail properties or visible site when the consumers download the app. We look at how a new brand is filling up this gap. If all these propositions align in our list then we look at a final go ahead at taking up the brand.

Moderator: Online retail works on data, what about the advantages in offline retail? How does one evaluate in physical retailing?

Girish Kumar: The biggest advantage of offline retail is that we are talking to the customer directly and we are not talking to a screen. This way you can engage with the customers directly and get to know exactly what are their dreams, their aspirations and their needs. Shoppers Stop has been partnering with multiple licensors across various levels — from private brands, a company like Disney to celebrity brands.

Moderator: Everything you do is based on law and legal contacts? What's your take when you look at international brands and licensing them in India. What are the challenges that you face?

Shweta Pandey: We are living in an omni-channel retail era where consumers are well aware and know exactly what are they looking for and the associations that they want to make when they are picking up a product. There is a lot of pressure on retailers today to continuously keep innovating and putting the best in-front of the customers in

their respective segments. What licensing helps you do at that basic level is help with that innovation and put that value in front of your customer at a very low risk. So the license does stand to benefit here as some of the initial investments and stake in the goodwill is not something which is upon him. From the licensors perspective, you are looking at licensing your brand which you have built with lot of effort over the years. Hence, you enlist an licensee matching your philosophy.

India is a very difficult country to work in when it comes to trademark protection, copyright, etc. So my advice is that you should be careful in choosing your partners and laying down everything which is required from a commercial perspective into writing.

Moderator: There is lot of urge with licenses to build their own brand vs. licensing brands?

Sanjeet Mehta: If you just look at the character licensing space in India there are broadly two approaches which are available. There is a huge move towards private labels. The two options which are available with retailers are that they can either create Disney as a separate line and brand it Disney or this proposition can fit in their private label. The crux of licensing is that anything you license out at the local level has to be in some conversation around that brand of that subject. I don't think one should reinvent this is where lot of people go wrong.



HOW SPORTS/FITNESS CAN CHANGE PEOPLE'S LIVES & THE ECONOMY

BY GURBIR SINGH GULATI



While the fashion goes sporty, and smileys are shared in abundance and lifestyle gets tougher by the day, all is surely not well. The government and the corporates, those really thinking of their customers and their well being 'Holistically', have already started working on the 'Fitness' agenda.

Presentation: Dave Thomas, MD, Adidas Group India



Being with adidas for more than 20 years, Dave Thomas strongly believes that sports can change lives, especially in a young nation like India. India's youth is a force to be reckoned with. It promises a fruitful future both for the country as well as businesses that associate with it. "We, at adidas, recognize that it is this young India which will take us to the Mars, but if proper awareness is not espoused, the generation might squander the opportunity. The responsibility of shaping the future — whether it will be a lazy or a energetic generation, rests on all influencers. We as a company

would like to share the responsibility that India as country should rise up the ranks globally and use some of the natural assets and resources and people that it has. Everybody knows about India's inclination for cricket, but what's changing is that now we have other sports growing in India like football, badminton, tennis, and other local sports like kabaddi. More of these sports are now being professionally driven through leagues where more support is coming in. On the activity and sports level, we see running growing to a larger base and even the government is giving a lot of support to this. Corporate players like Reliance are supporting sports related activities which is a good sign as they are realizing that sports is an important part of the country's development," he said.

adidas runs across 6 programs in several cities called the "adidas Uprising" where the brand encourages people to try sports for the first time or reconnect with sports. "We support the

International Yoga Day and support the government in activities which can change the lives of the citizens of this country. We have been champions of social causes which you can see in our Reebok brand campaign 'Fit to Fight'. We also try and address social questions addressing women — whether it is about equal pay, eve teasing or advocating the importance of learning self defense for women's safety. We support our employees and even our franchisee partners to live up to our belief and be the face of our brand to the consumers. Nevertheless, there are of issues regarding sustainability in the sports industry and we really see this seriously. We picked up an opportunity with plastic where we avoid using it on a larger scale and are using water bottles collected from the ocean and recycling into material to develop a shoe. We as a company are part of building and changing lives and sports can not only develop but can even boost an economy of a nation," he added.

PANEL DISCUSSION FASHIONING LIFESTYLE FOR A FITNESS ECONOMY

Fashion and fitness are blending together where it has become difficult for one to judge if fashion is driving fitness or fitness is driving fashion.

Moderator: We are talking about fitness, fashion and sports, then how come a company like Edelweiss Business Services have stakes in sports business and if you can throw some light on this?

Abhishek Gupta: I had the same question in my mind as to what will a finance guy speak on fashion and fitness. To tell everybody a little about us we are a large diversified financial company where finance is majorly our bread and butter. Our passion with sports started way back in 2009 when we started very small by

MODERATOR:

1 Rajesh Jain,
Lacoste

PANELISTS:

2 Abhishek Gupta,
SVP-Marketing,
Edelweiss Business
Services

3 Anuj Batra,
President Alcis Sports

4 Dave Thomas,
MD, Adidas Group
India



supporting athletes like PV Sindhu, Anita Paul, Mary Kom, et al with their training needs. This is one aspect that we strongly felt that we as a company should build for the country. Moving ahead, looking at a larger canvas, we decided to put more money in non-cricketing sports in the country. We are very proud to say that we now support Saina Nehwal, Dipa Karmakar and Rani Ramplan (who is the captain of the women's hockey team) who are our brand ambassadors. We did not stop here as our company went ahead and supported the team which had gone to RIO Olympics in 2016 where Edelweiss was the principal sponsor of the team. We took this association and now we are a principal sponsor for the Indian Team which is going to the Commonwealth Games. We will also sponsor the team which is going for Asian Games in August 2018 and then Tokyo Olympics in 2020.

Moderator: Tell us about **Alcis Sports** and its journey?

Anuj Batra: Alcis comes from a company which has been one of the largest sports manufacturers in India and we have been making products that are being supplied to 82 countries worldwide. The fitness culture is growing but not all could afford expensive sportswear. This is where we saw the gap and launched Alcis. So with the aim to give an altogether different product with 9 different technologies and

advancements and make it affordable for the masses of India. Today we are present in 4 EBOs and 164 MBOs across India and in total at 700 retail points.

Moderator: Tell us about the development of fitness and sports in India.

Dave Thomas: People in India have become aware about the value of training and sports. Even the mindset of the parents towards their kids to include sports in their curriculum is changing. India is in a position that it can perform at a world stage with all sports and fitness and it does not bar any sportsmen coming from any geography of this country today.

Moderator: Tell us who is mainly responsible to promote sports in India? Whether it is the government, a corporate or an individual?

Abhishek Gupta: I think none of the entities mentioned can do it alone because India is a large country. Personally one can motivate himself to join sports. But on the other hand corporate India can very well join hands with the government which is very actively promoting sports.

Anuj Batra: I think the government is taking all the right steps to promote sports in the country. This is evident in the Prime Minister's initiatives for yoga and campaigns like 'Khelo India'. The sports ministry has even brought the under 17 FIFA World Cup to India. We

need to inspire the citizens of this country to take up sports. We all need to teach our children the importance of sports for the well being of a human being.

Moderator to Dave Thomas: Is sports inspiring fashion or it's the other way around where fashion is promoting people to be fitter? What's your take?

Dave Thomas: I think it's a bit of a buzz. I even think of the brand like us which in 1970 had a basketball shoe which today is a superstar — it is a fashion icon. This tells us very clearly that people like to wear sports as a fashion statement. Looking at both the sides more and more fashion companies want to tap into the fashion side and even the sporting companies want to tap the consumers in their regular and sporting life.

To sum up sports today emerges as an important component of socio-economic development of a country. The active participation in sports improves community health and productivity, reduces medical expenses, imbibes discipline in character and enhances social cohesion. The execution of a mega sporting event helps in developing infrastructure, generating employment, securing inflow of foreign capital and thus contributes significantly to the economic development of a country. Therefore, it can be said that the impact of sports on the society is multi-dimensional.





IMAGES FASHION AWARDS 2018

The 18th edition of the IMAGES Fashion Awards powered by Stylumia rolled out the red carpet for some of Indian fashion retail's most illustrious names. Attended by India's most prolific luminaries from the fashion fraternity, IFA 2018 recognised the achievements of outstanding fashion brands and retailers across 22 unique categories.

The categories in IFA 2018 were adjudged by four distinct jury panels – a Business Jury, the Presentation-based Awards Jury, the Tech Implementation Awards Jury, and one for the IMAGES Fashion Success Story of the Year: Mall + Retailer Collaboration category.

The night of the awards, on the second day of the India Fashion Forum 2018, commenced with a stellar performance by nouveau Bollywood playback sensation Apeksha Dandekar, after which emcee Sophie Choudry and Anish Trivedi kicked off the award ceremony for IMAGES Fashion Awards 2018 with the presentation-based awards

Adidas was the big winner of the day, calling it a night with 3 awards – Most Admired Profitable Design Concept of the Year: Retail Design and VM, IMAGES Most Effective Marketing and Promotions Campaign of the Year, and the first





SPECIAL FASHION SHOW BY DEAL JEANS



runners up for IMAGES Fashion Success Story of the Year. Bata, Tommy Hilfiger, Myntra and 1 India family Mart were the other stars of the night winning two awards each.

The Grand Jury Chairman for IFA 2018 was B S Nagesh, Founder, TRRAIN. The jurors for this set of honours included Bijou Kurien, Strategy Board Member, L Catterton Asia Holdings; Debashish Mukherjee, Partner & Head - Consumer and Retail Industries, A T Kearney; Dr. Amrut Sadachar, Auburn University, USA; Dr. Ann Marie Fiore, Iowa State University, USA; Dr. GHS Prasad, NIFT, Hyderabad; Dr. Linda S Niehm, Iowa State University, USA; Dr. Sanjukta Pookulangara, University of North Texas; Dr. Sushil Raturi, NIFT, Mumbai; Jesper Nielsen, Founder, Amazing Jewellery, Denmark; Joseph Leftwich, Director, Retail Management Consultants, UK; Martin Nordlund Jenen, Partner & Director, Monili Jewellers Dubai; Rahul Singh, Founder, The Beer Café; Siewspah D Buhroy, NIFT, Shillong; and Vikas Gupta, CEO, ITC (LRBD).



BUSINESS AWARDS

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

TOMMY HILFIGER

- >> 340 sales points with pan India presence.
- >> Retail space grew by 23% over previous year.
- >> Sales turnover grew by 20% over previous year.
- 19 stores (with an average size of 2,000 sq.ft.) touched the magical ₹1 crore mark during the year.

NOMINEES:

- ★ Jack & Jones ★ Louis Phillippe ★ Parx



Presented by:
Dr. Sibichan Mathew, Professor, NIFT
Received by:
Team Tommy Hilfiger



Presented By:
Ganesh Subramanian, Founder & CEO, Stylumia
Received By:
Pashmi Shah, Neetu Luthra, Sumit Suneja, Zain Shaikh, Priyaranjan Manay and team Bestseller

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

VERO MODA

- >> 302 sales points with pan India presence.
- >> Retail space grew by 9% over previous year.
- >> Sales turnover grew by 30% over previous year.
- >> Accumulative sell through of 90%, like to like growth of 25% in the overall business.

NOMINEES:

- ★ AND ★ Deal Jeans ★ Madame ★ Only

**IMAGES MOST ADMIRER FASHION BRAND OF THE YEAR:
KIDSWEAR**

Pepe Jeans
LONDON

- >> In a period of 1 year the brand has increased the LFS stores from 51 stores in 2016 to 111 LFS stores in 2017, thereby establishing a strong presence in the kidswear segment.
- >> Retail space grew by 58% over previous year.
- >> Sales turnover grew by 65% over previous year.

NOMINEES:

- ★ 612 League ★ Tommy Hilfiger



Presented by:
Ganesh Subramanian, Founder & Ceo, Stylumia
Received by:
Sharad Nigam, Head - Retail; **Himanshu Pant**, AGM - Distribution, Pepe Jeans India Ltd.

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

TOMMY HILFINGER

- >> Available in 340-plus points of sale in 60 cities in India.
- >> Retail space grew by 23% over previous year.
- >> Sales turnover grew by 20% over previous year.
- >> 19 stores (with an average size of 2,000 sq.ft.) touched the magical ₹1 crore mark during the year.

NOMINEES:

- ★ Deal Jeans ★ Lee Cooper ★ Numero Uno ★ Only
- ★ Pepe Jeans London ★ Spykar ★ Tommy Hilfinger



Presented By:
Vishal Mirchandani, CEO - Retail & Commercial, Brigade Group
Received By:
Team Tommy Hilfinger



Presented by:
Vishal Mirchandani, CEO - Retail & Commercial, Brigade Group
Received by:
Nandan Prasade, Sumit Joshi, Haresh Kedar, Takshil Shah, Vishal Rai and Team Puma

**IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR:
ACTIVE SPORTSWEAR**



- >> 3,480 sales points with pan India presence.
- >> Retail space grew by 32% over previous year.
- >> Sales turnover grew by 25% over previous year.
- >> Most significant milestone was the launch of Suede Gully - a music video pioneering the largest movement in street culture in the country. This is the first time a global brand has launched a multi-lingual music video in India, giving this channel for consumer engagement a fresh spin.

NOMINEES:

- ★ Adidas ★ Alcis

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



Presented by:
Julie Woodhead, Former Buying Head Arcadia Group House
Received by:
Jayesh Savla, Madhu Kannan, Devendra Singh, Pranal Sawant and Team TCNS (W)

NOMINEES:

- ★ Global Desi ★ Neeru's ★ Sabhyata
- ★ Shree - The Indian Avatar



BUSINESS AWARDS

IMAGES MOST ADMIRED FASHION BRAND OF THE YEAR: FOOTWEAR



- >> 1,725 sales points with pan India presence.
- >> Retail space grew by 9% over previous year.
- >> Sales turnover grew by 7% over previous year.

NOMINEES:

- ★ Adidas Originals
- ★ Charles and Keith
- ★ INC 5
- ★ Metro
- ★ Puma



Presented by:
Bhavik Jhaveri & Ankur Joshi
Received by:
Sandeep Kataria, CEO, Bata India Ltd. and Team Bata



Presented By:
Martin Nordlund Jenen, Partner & Director, Monili Jewellers Dubai
Received By:
Akash Kumar, Micky, Satish Puranam, Vivek Thilakan and Team Landmark (Lifestyle)

IMAGES MOST ADMIRED AFFORDABLE FASHION RETAILER OF THE YEAR



- >> Currently have 256 stores located across India.
- >> Retail space growth of 21% over the previous year
- >> 13% sales growth over the previous year
- >> Rolled out "Mission Happiness" - Net Promoter Score system using voting machines at cash counters in 87 stores in 2016 which further got extended to full network in 2017, established a dedicated call centre to speak to customers and also received in bound calls for various queries/grievances. 98% of customer complaints are resolved in less than 48hours.

NOMINEES:

- ★ Bata
- ★ Neerus
- ★ V-Mart

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



- >> The brand is celebrating its 12 years presence in India and today has over 210 stores across 90 cities.
- >> Retail space growth of 25% over the previous year.
- >> Growing at 25% CAGR making it the most profitable mono-fashion brand in the country.
- >> 8% same store growth

NOMINEES:

- ★ Central
- ★ Lifestyle
- ★ Shoppers Stop



Presented by:
Bijou Kurien, Strategy Board Member, L Catterton Asia Holdings
Received by:
Sandeep Mistry, Head, IT, Pantaloon's; Vijay Verma, Program Manager, Pantaloon's

IMAGES MOST ADMIRE RISING STAR OF THE YEAR



- >> The journey started at the initial stage retailing through small MBO shops and over the years the retailing experience has transformed its presence in organized retail through Large Format Stores and online presence which has helped the brand to grow much faster. Presently, the brand retails through space area of 36,029 sq.ft., which comprises all verticals and 945 sales points.
- >> Retail space grew by over 100% over previous year.

- >> Becoming the leading users of Liva, the fluid fabric, to emerge as leaders in the world of women's apparel and had an almost 1,500 percent growth in demand for their garments. Due to this rise in demand production of 250,000 garments per month as opposed to just 15,000 garments a month in FY14. On their way to becoming the absolute top consumers of Liva fabric in the world!
- >> Currently have 40 sales points
- >> Retail space grew by over 100% over previous year.
- >> Sales turnover grew by 62% over previous year.



Presented By:
Maura Regan, Executive Vice President, Lima

Received By:
Sameer Patel, Founder & Chairman; **Apeksha Patel**, CEO and **Team Deal**

Presented By:
Maura Regan, Executive Vice President, Lima

Received By:
Sandeep Kapoor, Chairman & MD, **Sheetal Kapoor**, Joint MD and **Team Shree**

NOMINEES: ★ Easybuy ★ Neerus ★ Sabhyata ★ Truffle



Presented By:
Amitabh Taneja, CMD, IMAGES GROUP

Received By:
Mohit Goyal, **Kadambari Gupte**, **Nandini Garg**, **Vaani Kapoor** and **Team House of Anita Dongre (AND & Global Desi)**

IMAGES MOST ADMIRE FASHION COMPANY OF THE YEAR

HOUSE OF ANITA DONGRE

- >> Anita Dongre has been at the forefront of fashion for over 20 years, having created one of the most successful fashion houses in India. Launched in 1995, the House of Anita Dongre comprises a portfolio of brands namely AND, Global Desi and Anita Dongre, Grassroot, Pinkcity.
- >> 1,000+ retail points across the country.
- >> 280+ exclusive brand stores.
- >> 2,800+ employees across the country.
- >> US\$ 100 million + projected turn over for FY 2017-18.
- >> CAGR of 15%+ over the last 3 years.

NOMINEES:

- ★ Being Human Clothing ★ Bestseller India ★ Neerus Ensembles Pvt. Ltd. ★ Pantaloons ★ Pepe Jeans London



BUSINESS AWARDS

IMAGES MOST ADMIRED FASHION FORWARD RETAILER OF THE YEAR



- >> Currently have 38 stores located in Uttar Pradesh, Bihar & Uttarakhand
- >> Retail space grew by 55% over previous year.
- >> Sales turnover grew by 49% over previous year.

NOMINEES:

- ★ Aggain ★ Prestige Fashions ★ V-Bazaar



Presented by:

Bijou Kurien, Strategy Board Member, L Catterton Asia Holdings

Received by:

J P Shukla, CEO, Nysaa Retail, 1-India Family Mart

PRESENTATION AWARDS

The 18th edition of the India Fashion Forum featured a brand new addition to the award categories. Christened as The Presentation Awards, they recognised the efforts of brands and retailers across 5 core categories that are mentioned below:

- >> **The Most Valuable Fashion Startups**
- >> **Most Profitable Design Concepts**
- >> **Most Effective Marketing and Promotion Campaigns**
- >> **Most Exciting Innovations**
- >> **Most Effective Tech Implementations**

The sessions involved video presentations by various brands and retailers that was followed by a round of Q&A with a panel of distinguished judges. The bench of judges included Joseph Leftwich, Director, Retail management Consultants, UK; Martin Nordlun Jenen, Partner and Director, Monili Jewellers, Dubai; and Professors Dr. Anne Amrie Flore and Dr. Linda S Niehm from Iowa State University amongst others.

A full report of each of the concepts showcased by the winners as well as the the nominees are detailed in the pages that follow.

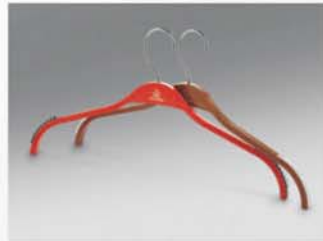


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**IMAGES MOST ADMIRIED PROFITABLE DESIGN CONCEPT OF THE YEAR:
RETAIL DESIGN & VM**

Presented By:
BS Nagesh, Founder, TRRAIN



Received By:
Rohan Ladha, Priyanka Arondekar – Team Adidas

Adidas – adidas Homecourt Store at Express Avenue Mall, Chennai

The Homecourt concept is all about the spirit of sports – the thrill of a sports event and the frenzy of a fan. As the name suggests, Homecourt is an inspiration directly from the place where every sports person's heart belongs to – the stadium. Spread over more than 7,500 sq.ft., the store design gives consumer the feeling of being in a stadium, even encompassing a mini football stadium inside and features three major zones – the experience zone, the lounge area and the print shop. The experience has helped the store emboss itself as one of the top 5 most profitable stores in India with a business of about ₹80 lakhs every month.



Received By:
Vikas Bissa, Shradha Kurup, Mohit Dhanjal, Sanjeev Rao, Leela Hara Krishna – Team Raymond

The Raymond Shop - Mini TRS

Spread over 800 sq.ft., The Raymond Shop Mini TRS is a new retail store concept featuring modular designs and best global retail practices with local execution capabilities and an integrated digital omni-channel capability. The TRS stores requires optimised investment, around one third of a normal store and reduces project time from 75 days to less than 30 days. The first Mini TRS was launched on 25th March 2017 at Bitha, Bihar and 70 more stores were rolled out in the last 11 months earning the distinction of fastest roll out of stores in Indian fashion retail history.

**IMAGES MOST ADMIRIED
PROFITABLE DESIGN CONCEPT OF THE YEAR:
FASHION LINE**

**WILLS
LIFESTYLE**

Received By:
UMMED SINGH, Head - Marketing, Wills Lifestyle



Wills Lifestyle – The Elements Collection

The Elements collection was an ode to the elements – Earth, Water, Fire, Air and Space and featured a unique set of stories, coming alive on high quality fabric with innovative offerings, inspired by the many moods of these elements. Starting with the Water collection, the brand shelled out a new collection every two months. While the Water collection enjoyed a 55 percent sell through in 60 days, the Earth and the Fire collection enjoyed a 68 percent and 48 percent sell through respectively in 60 days.

A LOOK AT THE OTHER DESIGN CONCEPT FINALISTS:

BATA-RED CONCEPT

The core concept of the strategy was to bring swagger to Bata, delight shoppers with an easy and inspiring shopping experience and emboss the concept that product is king. Hitherto, 5 stores with this concept have been launched, with the store in South City Mall, Kolkata, being the largest in east India with 10,000 sq.ft., area. The concept resulted in an increase of 15 percent in stores, 5 percent in footfall, 15 percent in sales per sq.ft., and 10 percent in ASP. A global concept with design concept from Italy, Bata aims to roll out about 100 stores by the end of 2018 in India.

SHAZÉ-GO BOLD COLLECTION

Defined by modern aesthetics, the Shazé Go Bold unique designs go beyond the ordinary to create collections that are trendsetting the world of fashion. The collection encompasses necklaces that are handmade, light and are manifestations of an attitude that is anything but predictable. The brand's supporting campaign #subtleisdead also witnessed significant momentum in social media.

LIFESTYLE-THE 'LIVE STORIES' MNEMONIC

Lifestyle's festive VM design, the 'live stories' mnemonic replicated the lively social media feature, togetherness and helped engage and interact with the youth demographic. Use of kinetic lights - which is a synchronised motion of lights along with music is an innovative technology and used for client engagement. The addition of some decorative focus lights on top of key clusters keeping in line with the festive feel was instrumental in connecting with customers.

BEING HUMAN-CONCEPT STORE, SEAWOODS

As a big store, standing as tall as 19' and 38' wide and covering an area of 2,558 sq.ft., the store displays a unique concept wstructure and the concept of old French windows opening on to a balcony gives it a very French mood. The interior is designed in a way to give the feeling of an under constructed building. The track lights add to the raw and robust feel of the design.

THE RAYMOND SHOP-TECHNO STRETCH

The Raymond Metamorphosis Windows (or Live Windows), created across 650 stores in India, were one of the mediums of the campaign that sought to demonstrate three features of the Raymond Techno Stretch collection - the comfort, the stretch and the technology. Growth of 120 percent recorded at the stores with Live Windows and 85 percent at the other stores. It also registered over 33,600 video views on Facebook, over 6,800 views in Instagram and 2.2 lakh views on Youtube.

MYNTRA-THE FREELANDER COLLECTION BY ROADSTER LIFE CO

The Frelander collections feature laid back utilitarian casuals in nature inspired palettes and enhanced textures and heavy washes. Redefining modern essentials it is tailored for everyday functionality with both its men's and women's range. Launched on September 2017, it sold 1.6 lakh units generating about ₹1.5 crores revenue with 40 percent gross margin. The brand marketing metrics also witnessed a 48 percent rise in Google searches, 25 percent rise in brand contribution to Myntra, 22 percent rise in customer acquisition, 13 percent rise in repeat customers, and 20 percent baseline review in brand revenue.

W-THE SIGNATURE ALLDAYDRESS

W's The Signature AllDayDress is all about making a statement. The campaign aimed to promote four key looks - the Statement Workwear, the Signature AllDayDress, the Perfect Fusion Look and the Urban Social Style. Promotions also included store windows and focal key points. The brand registered a significant popularity of the promoted collections which resulted in footfall and good sales.

THE RAYMOND SHOP-TECHNO STRETCH

Touted as the world's smartest fabric, Raymond Techno Stretch features four unique properties - UV protection, water repellent, easy care and natural stretch. It is crafted for the smart traveller - people who are always on the move and are in need for a comfort fabric with excellent features catering to all the needs of the consumer. Designed across all suiting categories like trousering, suit, jacket, with blends in Polywool, Poly viscose, 130's, 90's wool grade, Techno Smart provided a business of ₹80 crores in the year 2017, across all categories in suiting business.

BATA-PATA PATA

Bata sold about five lakhs units of the Pata Pata flip-flop collection in the last year. The premium range of flip-flops is inspired from Indian culture and the Masala range features authentic native motifs, patterns and folk colours, showcasing the rich heritage of the country. Launching a new collection every season, Pata Pata is reviving Indian art and culture with its exclusive design stories. The brand's success rests on the magical mantra of design, quality, and aggressive marketing.

Jury: Bijou Kurien, Strategy Board Member, L Catterton Asia Holdings; Debashish Mukherjee, Partner & Head - Consumer and Retail Industries, A T Kearney; Dr. Amrut Sadachar, Auburn University, USA; Dr. Sushil Raturi, NIFT, Mumbai; Joseph Leftwich, Director, Retail Management Consultants, UK; Martin Nordlund Jensen, Partner & Director, Monili Jewellers, Dubai; Prof. (Dr.) Ann Marie Fiore, Iowa State University, USA; Prof. (Dr.) Linda S Niehm, Iowa State University, USA.



IMAGES MOST EFFECTIVE MARKETING & PROMOTIONS CAMPAIGN OF THE YEAR

Presented By:
Joseph Leftwich, Direction Retail Management Consultants, UK



Received By:
Chirag Shah, Chandan Kumar, Kunal Ponda, Kushal Kulkarni, Roshni Acharya + Team Brand Factory

Brand Factory - Free Shopping Weekend 2.0

Brand Factory has the distinction of the first ticketed sale in India across 60 stores and 25 cities. A full fledged digital promotion was exercised which was covered exclusively by youth influencers, along with support from mainline, and PR as well. While about 2 lakh tickets got sold in the first two days, the brand received 2 crores unique reach on Facebook, 1.1 crore impressions with over 2 lakh 100 percent FB video views, 21+ lakh impressions on Google, and more than 1 crore impressions with 1 lakh link clicks on Instagram, amongst others. Brand Factory clocked two months sales in just 5 days, with about 6 lakh tickets and 35 lakh pieces sold.

Received By:
Rahul Malhotra, Associate General Manager, International Business, Manyavar



Manyavar - Naye Rishte Naye Vaade Campaign

The Naye Rishte Naye Vaade campaign, featuring brand ambassadors Virat Kohli and Anushka Sharma (Vir-ushka), to inspire and celebrate millennial couples as they lean towards meaning over mere tradition. The TVC received over 1 million views within 3 days of launch on Youtube, 20+ million views on Facebook and 2+ million views on Instagram. On Twitter, it received 6+ hours of pan India trending on the day of launch. Over all, the campaign registered 5,000+ participants, 10+ million reach and 72 million impressions along with creating a buzz amongst media power houses.



Received By:
Amrith Gopinath, Brand Activation Director, Adidas Group, **Manik Dhodi**, Head Real Estate, Adidas Group



Adidas Sports Culture promotion

In order to get more Indians to start playing sports, adidas launched an on ground property ADIDAS Uprising, as part of this activity multiple sport venues are activated in key cities and people are given a chance to get back to playing sports. A Facebook campaign was launched, which saw more than 10,000 users updating their profile pictures with the "SPORT LOOKS GOOD ON ME" frame.

Received By:
Prachi Mohapatra, CMO, fbb



FBB - Forever Kurtis

FBB's campaign highlighted the versatility of kurtis. Be it a wild party, a cultural or auspicious event with family, a first day in a corporate office, or a vibrant bet for a summer holiday, a kurti can pull it off with equal panache. The campaign adopted a 360 degree approach exercising ATL and put more focus on BTL activation, VM and loyalty programs. The return was 92 percent increment in sales of units without discounting, along with add on sales in other categories like leggings and churidar sales taking off.

A LOOK AT THE OTHER FINALISTS:

AND-CONSUMER INTERACTION CAMPAIGN

AND's Marketing and Promotion 2017 campaign was buttressed by four robust pillars – Carving Communication Niche, Content Customisation, Innovative Formats, Reach and Frequency Optimisation, Engagement and the very unique Online Spends and Offline Measurability. Social media has helped the brand in measuring the impact of online spends on offline sales, a feat only few brands have been able to accomplish in the country generating a revenue of 13X.

CENTRAL-KOLKATA LAUNCH CAMPAIGN

As the last large format department store set up operations in Kolkata, a complete 360 campaign was developed to connect with the people through an emotional route. The communication was developed in Bengali and English, and Anupam Roy, noted Bengali music composer composed the music. On the day of the launch 7,000 customers turned up, 3000 people turned up only to see Disha Patani. About 10,326 walk-ins were registered on the day of the print ad, and sales in 3 days (Fri to Sun) reached ₹1 crores with 4000, Central loyalty members.

MYNTRA-FASHION CONSUMPTION DISRUPTION CAMPAIGN

To appeal to every individual across geographies, personalisation was indispensable and hence Myntra tied up with AdGreetz to target Facebook audience with a personalised of the main TVC, resulting in 20 percent higher video completion rates. EORS – latest video had weekly views of 30+ million in just 5 days on YouTube and Facebook. Special customised approach was done in a holistic manner in West Bengal and Tamil Nadu. The EOS ROI was about 9.9, and the site registered 51 percent increase in traffic and about 15 percent increase in spontaneous recall in a span of about 15 days.

WOOLMARK-MERINO WOOL PROMOTION

The Woolmark Company's campaign was about how Woolmark's journey from a 55 year logo to a sheep and then an Indian face along with its now famous Grown In Australia, Made In India campaign. The campaign, that featured the farm to fashion journey of Merino Wool, features Indian television actor and Wool Ambassador, Shравan Reddy and released air play in various TV channels apart from Youtube and billboards.

FOREVER 21-VIDYA VOX CAMPAIGN AND SCREAM KUTHU CONTEST

Forever 21's campaign featured Vidya Vox, an Indo-American YouTuber and singer, in an exclusive TVC showcasing the latest Fall collection to generate conversations and strong engagement. An exclusively curated collection by Vidya Vox was for sale on Forever21.com for 3 days. Digital marketing efforts resulted in focused, high impact editorial outcomes in leading national and regional media generating an ad value of ₹1.68 crores. The sales generated on forever21.com contributed to 6 percent of the channel's monthly sales. The Scream Kuthu contest helped generate 15,094,427 Facebook followers and a consistent increase by an average of 20,000 per month followers per month; engagement rates ranged between 8 to 15 percent for these campaigns.

THE RAYMOND SHOP-WINNING IN MANY INDIA

Drawing a new road map and shifting focus to stitch a new success story the brand focused on decentralisation and adopted the method of empowerment to redefine local store marketing. Area managers planned, researched and executed a moonshot approach to drive Point of Sales to Point of Experience. The approach included a calendar approach, with festivals and special days being celebrated at stores. The result was that store activities leapfrogged to 8,950 in 31st December 2017 in contrast to the previous year's figure of 621, along with the initiative of winning various awards like Excellence in Retail Marketing by Global Excellence Award, Best Social Media Campaign by ET Now, etc.

JACK & JONES- THEME CAMPAIGNS TO LAUNCH COLLECTIONS

The idea behind the campaign was that if clothes should be your personality and Jack & Jones showcased it by inculcating the brand philosophy which is Don't Hold Back through a crowd sourced video. The video featured youth phenomenon and noted Indian actor Ranveer Kapoor along with four other rap artists singing along to a track written by Kapoor himself. The campaign was an instant hit fetching 2.5 million views on Facebook and 4.8 million views on YouTube within just two weeks.

MAX FASHION-MAXYOURLOOK A/W 2017 MARKETING

Max Fashion's unique marketing strategy aimed to leverage the brand insight of Max being a fashion kitchen for customers to mix and match fashion. The #MaxYourLook campaign aimed to talk to consumers through all touch points and the company also partnered with Elle to showcase various Max looks to its consumers, a step that induced more than 45,000 customer trials with over 22,000 looks uploaded across 800 cities. In store, the transition was to sell looks than products. The result was 18 million reach with 16.7 million Facebook and YouTube hits, 30 percent increase in sales contribution in 18 to 24 years customer segment. A 25 percent increase in sales contribution was registered for the customer bracket 25 to 32 years and store visit and customer transactions leapfrogged by 22 percent and 25 percent respectively. As a whole the campaign helped the company achieve 32 percent growth in sales.

PUMA-SUEDE GULLY

Street Gully is Puma's efforts to promote its suede collections that has been winning hearts world over since 1968 and establish suede as synonymous to the Indian street culture. The campaign showcased a massive collaboration of artists - 7 street artists, 8 rappers, 36 dancers. The trailer and the narrative that was released made 49 million impressions, 1.6 million page views, and 3,000 shares on average. With the entire video launched, it enjoyed 20 million total reach with 6 lakh engagements with 2 minutes average view duration in YouTube worldwide.

LIFESTYLE-CELEBRITIES & CUSTOMERS ENGAGEMENT TO SET TRENDS

Lifestyle showcased two campaigns #TestedByTiger for Forca featuring actor Tiger Shroff and #ImperfectlyPerfect for Ginger that features girls from different walks of life celebrating their uniqueness and take head on the deep rooted discrimination that they face every day. While #TestedByTiger garnered 23.3 million impressions, 9.77 million views and 6.7 million engagement along with organic trending of 3 days and 8 hours on YouTube and Twitter, #ImperfectlyPerfect campaign garnered 11 million impressions, 4.65 million video views and 1.1 million engagement and trended 7 hours organically on twitter.

W-FESTIVE DRAMA

W Festive Drama campaign included two collections – The Mughal Gown and Metallic Muse. The campaign manifested itself in different space, categories and platforms, including print media, retail marketing, PR, digital, billboards, etc. In store activities included, VM, magnetic tent cards, key focal points, store branding, etc. The brand also exercised rigorous digital promotion including social media and made various associations with fashion media, influencers, celebrity stylists, journalists, et al.

JOHN PLAYERS-KEY TO LIFE

John Players campaign decided to give their TG, which is aspiring young men who love to travel, an opportunity to live out their dreams of travel. The campaign included signing them for a lucky draw a motorcycle to be won from each of the 154 participating stores across the country and a mega price of SUVs if they were to refer four friends. In the 45 to 60 days that the campaign lasted, the brand acquired 44,806 new customers and retained 7,312 2 customers that generated business worth ₹9.12+ crores and ₹4.66+ crores respectively. The campaign also included radio campaign and influencer engagements with RJ activation at 3 stores in Delhi, Noida and Gurugram.



IMAGES MOST ADMIRER FASHION INNOVATION OF THE YEAR

Presented by:

Raza Beig, Director Landmark Group, CEO Splash & Iconic Dubai



Birla Cellulose
Fibres from nature



Received By:

Manohar Kamath, CXO & Head, Myntra
Rajesh Vishram Narkar, Vice President - Brand Management, Myntra
Suraj Kiran Baadkar, Senior UX Designer, Myntra
Rohit Jain, Senior Director & Chief of Staff, Myntra

Myntra - Vorta

Vorta is Myntra's data driven Intelligent Fashion initiative. It is reimagining the conventional fashion designing and manufacturing process by using advanced Data Analytics and Artificial Intelligence to create fashion – infusing global fashion trends with global retail data into valuable fashion insights. Myntra has buttressed on this AI engine to build two of the most profitable and fastest growing brands for Myntra: Modra Rapido and Here & Now.



Received By:

Rajesh Pahuja, Deputy Manager - Branding & Communication, Birla Cellulose; **Rishi Sharma**, General Manager & Head - Digital Marketing, Birla Cellulose; **Uday Khadilkar**, Vice President & Head - Supply Chain, Birla Cellulose

Birla Cellulose - Liva

Liva stands for the high quality fabric made using natural cellulosic fibres of Aditya Birla Group, delivered through an accredited value chain. Unlike other fabrics which are boxy or synthetic, Liva is a soft, fluid fabric which falls and drapes well. Liva is increasingly becoming the numero uno choice of fashion brands since its launch. In Spring Summer 2015, the fabric was used in about 18.5 lakh garments in 12 brands that jumped to 20.5 lakh garments and 16 brands by Autumn Winter 2015. The year 2016 witnessed 69 lakh garments by 22 brands in Spring Summer and by Autumn Winter 2016, about 30 brands adopted Liva bolstering the count to 85 lakh garments. W, Biba, Lifestyle, Aurelia, Van Heusen, Solly, Wills Lifestyle, Reliance Trends, et al., are a few names that trust Liva now.

THE OTHER NOMINEES:

BROADCAST WEARABLES PVT. LTD.: INDIA'S TOUCH ENABLED T-SHIRTS

Broadcast Wearables Pvt Ltd., showcased two innovations – non-interactive and interactive LED fitted t-shirts. The t-shirts have an LED panel sandwiched between layers of cloth, connected via a bluetooth chip and battery. While the non-interactive ones feature a few preset designs in LED display, the interactive ones can be synced with mobile phones for preferred designs and slogans. These highly durable and washable t-shirts, also works as a fitness tracker, keeping count of the steps taken, floors climbed, calories burnt and as a cycling jersey, with headlights and indicators essential in the dark. These 90 percent made in India t-shirts even act as navigation devices via a vibrating mechanism.

THE RAYMOND SHOP: RAYMOND KHADI

The Raymond Khadi concept was taken as a contribution towards India's diverse craft heritage by supporting artisans with employment opportunity. Raymond Khadi is a differentiating product which was possible by working hand in hand with artisans throughout India to share design knowledge and also to upgrade their skills. As such, the product endeavour signifies the value addition done to the product and the value chain making it a sustainable choice as per the market trend. As of now, Khadi in wool, silk, cotton, wool blends, cotton blends and silk blends in product categories like trousers, shawls and scarves and jackets.

ANALYSIS

BIG DATA

IN-STORE TECHNOLOGIES

RETAIL OPERATIONS

SUPPLY CHAIN & LOGISTICS

RETAIL FORMATS

MARKETING & BRANDING

LOCATION STRATEGY

INNOVATION TRACKER

STORE DESIGN

CUSTOMER EXPERIENCE

SHOPPING CENTRES

VISUAL MERCHANDISING

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INDIA fashion EXPO



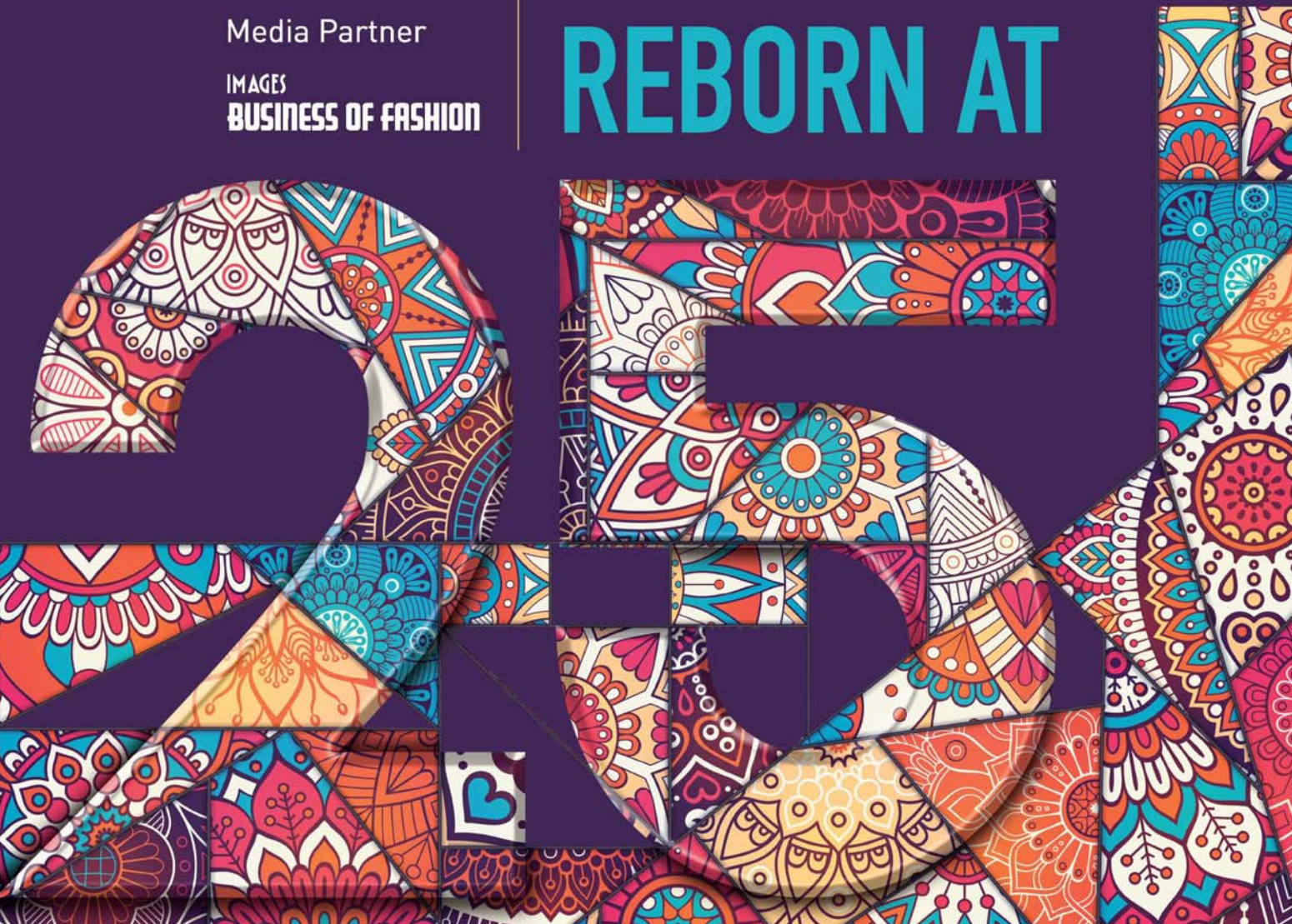
2018

20th, 21st, and 22nd June
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KEY HIGHLIGHTS OF THE EVENT

- More Than 300 Participants from Kolkata, Ahmedabad, Indore, Surat, Jaipur, Delhi, Chennai, Ludhiana, and Mumbai
- New categories added including ethnic wear and RTS (Ready To Stitch)
- Add-on Expo of allied agencies, consultants and display system provider for retail industry
- Pre-registration Available for hassle-free entry
- All time catering in the event by one of the best caterers of Kolkata
- Celebrity events for Retailers in the Evening after Business Hours
- Major Retailers, Distributors, and Agents attending as Official Guests of the event
- 5000+ quality Retailers expected to visit the Expo

EASTERN INDIA GARMENT MANUFACTURERS & EXPORTERS FEDERATION

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E: info@eigmef.com, eigmef@gmail.com

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IMAGES MOST VALUABLE FASHION STARTUPS OF THE YEAR

The awards coronated some of the most valuable and unique fashion startups of the year 2017. All the 10 nominees had 2 minutes to present their brand, which was followed by a 2 minute Q&A round by the jury.

Awards Presented by:
MUKUL BAFNA, CEO ARVIND INTERNET

WINNER

6DEGREE^o

6Degree is a talent platform for fashion professionals including students, bloggers, employers, designers and photographers. Founded in 2014 by Nikhil Hegde and Amit Bhardwaj, the fashion start-up works on the theory of 'Six degrees of separation', that everyone is within six or fewer steps away. The platform serves as a place where fashion professionals can showcase their work online and offline, discover other like-minded professionals, network and grow their business within the fashion community. 6Degree provides plethora of products and services entailing online fashion platform, dedicated fashion job portal, fashion event associations and an end-to-end brand consultancy service for fashion professionals.



Received by:
Nikhil Hegde, Co Founder, 6 Degree

1ST RUNNER-UP



Received by:
Saroja Yeramilli, Founder & CEO, Melorra

Melorra designs jewellery for the Western wardrobe. Melorra's global trend-spotters spot the styles that'll make the cut for today's fashion scene across global runways like Paris and Milan, which its international design team interprets to create jewellery. The brand's jewellery is available in all shades of gold – yellow, white and rose along with gemstones in sync with fashion colours of the latest season. Melorra brings you an endless palette of colours in the world of semi-precious gemstones which include cultured and freshwater pearls.

2ND RUNNER-UP



Received by:
Arvind Saraf, Founder, Wishbook

Wishbook allows you to grow your B2B business from your phone or laptop. Listed by CIO review as one of 20 most promising Saas Providers of India in 2017, it is a catalog app which intends to digitise fashion/apparel catalog distribution and sales process. B2B Catalog/Sales App allows digital catalog sharing from manufacturers to distributors to wholesalers to retailers, and enables sales persons to show catalogs, take orders and file daily reports. This is mobile and web based app which will replace the printed catalog books that are expensive and slow to share. Faster feedback on the styles and their movement allows the manufacturer to better plan repeat production.



LET US TAKE A LOOK AT OTHER NOMINEES:

PAUL ADAMS

Paul Adams believe that art is a reflection of one's inner self, attitude and style. In line with this, the brand features a unique line of bags and accessories with actual handmade abstract designs from a panel of artists across India. The products are a reflection of modern lifestyle and are designed with the sole motto of – The New You, which also is the brand motto. As of now, Paul Adams is available on Amazon and soon plans to expand via SiS format in reputed malls.

CARPENTER JEANS

Carpenter Jeans was created as an Indian brand that can carve a niche in the global platform. A man's casual wear specialist created for the price sensitive Indian market, the USP of the brand is its uber chic designs and pocket friendly prices. The core motto of the brand is to deliver a great product at a great price.

QUESTRERRA

A pioneering and innovative platform, Questerra seeks to bridge the gap between the need for, and supply of, culturally aware professionals in today's society. With the advent of today's geo-political issues, a shrinking world, and global market places, it's imperative to have cross cultural knowledge on issues related to your industry. Questerra focuses on in-depth and well researched tour itineraries, capable and knowledgeable tour mentors (from the same industry distinguished professional), and high impact networking among other aspects to create a tour that is a mix of work and play. Questerras' tours are designed to instigate curiosity, feeding it with inspiration and quenching it with sheer passion.

MORIKO

Moriko Organic is a 100 percent GOTS certified organic clothing web-store aimed at the gaining popularity and growing interest of environment-friendly fabrics. The genesis of Moriko Organic, (pronounced Moh-Ree-Ko, which is Japanese for 'Child of the Forest'), began when its founders started taking note of the rapid deterioration of the ecological balance. As the environment deteriorates, the worst damage is being caused to young children who are the future of this planet. Catering exclusively to organic clothing for kids, the logo signifies healing and protection.

X PLUS DERNIER CRI

X Plus Dernier Cri is a one stop online solution provider for all needs pertaining to plus size fashion. The portal focuses only on the plus size segment and harbours a slew of variety for men, women and kids. A product of iFocal Solutions Pvt. Ltd., X Plus Dernier Cri was drawn from a French word 'Dernier Cri' which means 'The Very Latest Fashion'. The beta version was introduced in June, 2017 before fully going operational from 1st October, 2017. X Plus Dernier Cri has been launched keeping focus on the niche market and to serve the requirements of the targeted audience as per their needs, which was indeed a very tough task till now for many consumers.

MONROW

Indian women have broad feet. Most brands in the market, especially in the heels segment are not made for broad feet, making the choice very limited. The idea of Monrow flourished in an attempt to bridge this gap with fashion and comfort. The brand's super comfortable products are buttressed by extremely flexible soles and an added support of 4mm soft foam under the heel and toes.

MERRY KÄUFER

Merry Käufer is India's first platform providing the luxury of hiring a personal stylist at the ease of your doorstep. The brand aims to personally consult and solve styling queries of men and women, to help them look great and feel more confident about themselves.

Whether one needs a wardrobe makeover or to attend an event it has styling services for all styling needs including, Wardrobe Styling, Event Styling, Wedding Styling, etc. Merry Käufer's personal stylists are professionals certified by top fashion institutes of India. They help to create the image that one wants to present to the world, letting them be within their comfort zone.

Jury: Arun Gupta, MD, Ingenium Advisory; Ashish Dhir, Wisedge; Joseph Leftwich, Director, Retail Management Consultants, UK; Martin Nordlund Jenen, Partner & Director, Monili Jewellers Dubai; Mohit Vohra, Managing Consultant, PwC; Prof. Sibichan Mathew, NIFT; Prof. Linda S Niehm, Iowa State Univ, USA; Siewspah D Buhroy, NIFT; Vikas Gupta, CEO, ITC (LRBD); Hemant Sood, Business Strategist; Prof. Elena Karpova, Iowa State University (ISU) Dept. of Apparel Events & Hospitality Management.



IMAGES MOST EFFECTIVE TECH IMPLEMENTATION OF THE YEAR: IN- STORE TECHNOLOGY ADOPTION

AND

NOMINEES:

★ Arvind Internet - Levis ★ Pantaloons

Presented by:

Arun Gupta, MD, Ingenium Advisory

Received by:

Mohit Goyal, Marketing Head, AND & Global Desi; **Kadambari Gupte**, Deputy Manager - Public Relations, AND & Global Desi; **Nandini Garg**, Deputy Manager - Brand Communications, AND; **Vaani Kapoor**, Stylist, AND



Challenges:

1. Access to inventory across various stock points.
2. Loss of sales due to unavailability of specific sizes or styles in store.
3. Delay in resolution of consumer complaints
4. Contribution of social media advertising spends to offline sales not measurable.

Solutions

5. Area and Cluster leads were provided with direct access to warehouse stock under 'Auto Replenishment System', so that they can pre-order replenishments at the touch of a button through the tabs provided to them.
6. Implementation of omni-channel solution that consumers can utilise via tabs provided in stores. Free home delivery, COD, and free returns were offered to bolster the service. It also allowed the brand to offer an endless aisle experience to consumers. In some stores, contribution from omni-channel was as high as 3 percent within the first two months of implementation.
7. Conversations from multiple platforms were consolidated into a single platform using Simplify 350 tool. WhatsApp, Instagram, Twitter and other consumer friendly messaging apps were added to pre-existing modes of phone calls, SMS-s, etc. The result was that 90 percent conversations are now responded within 2 hours.
8. Integration of CRM data with FB audience, thereby creating a 360 view of consumer segments. This allowed the brand to create customised campaigns and serve them seamlessly across all channels. ROI on social spends was pegged at 13X.



Presented by:

Arun Gupta, MD, Ingenium Advisory

Received By:

Manohar Kamath, CXO & Head, Myntra; **Rajesh Vishram Narkar**, Vice President - Brand Management, Myntra; **Suraj Kiran Baadkar**, Senior UX Designer, Myntra; **Rohit Jain**, Senior Director & Chief of Staff, Myntra

NOMINEES:

★ Arvind Internet-Soch ★ Raymond

IMAGES MOST EFFECTIVE TECH IMPLEMENTATION OF THE YEAR: CUSTOMER EXPERIENCE TECH IMPLEMENTATION



Myntra

Myntra seeks to create a hassle free return process for genuine customer by automating the return case evaluation without manual intervention of the customer care department. The solution they introduced was SABRe, a machine learning built in-house, which takes into account multiple dimensions of the return right from the customer, the product, logistics and all related elements to generate a probability of it being a genuine return or a non genuine return. The technology has made returns hassle free for 95 percent of its consumers, with reduction in number of quality checks and customer care interactions.

The second technology that Myntra implemented is 'Sentient' that helps change the manual and reactive way the contact center handled different channels that customers leveraged to raise queries. Sentient is a bot that understands the customer's voice, and utilising customer interaction from all the channels creates a dashboard for Myntra in terms of what is happening and which cases are being escalated. The bot can also convert voice into text, even sense consumer emotions, and predicts an auto escalation to the desks that take action. It has helped Myntra prioritise complaints within the company's network, ensure 100 percent QA of customer complaint calls and generate insight into the business.

IMAGES MOST EFFECTIVE TECH IMPLEMENTATION OF THE YEAR: OMNICHANNEL TECHNOLOGY IMPLEMENTATION

ARVIND ARVIND internet ▶

Arvind Lifestyle Brands - Arvind Internet

Arvind Lifestyle Brands experienced the three basic problems that infest most businesses – they wanted to reduce cost, increase revenue and heighten customer experience. The group's futuristic mission to connect all its modes of shopping to create a seamless shopping experience was actualised by NNNOW. NNNOW's omni-channel is powered by strong logistics at the back-end and a strong network of 1,200 stores. A customer can visit a store or skim thorough the catalogue online before he narrows down on what he wants to buy. If the chosen garment is not in stock, its availability can very well be located at the nationwide inventory using now. The customer can then either pick up the garment from a location of his choice or have it delivered to his home.



Presented by:

Arun Gupta, MD, Ingenium Advisory

Received by:

Amit Sawant, Area Manager - West; **Pratikshit Pandey**, Head Operations; **Debangini Nath**, Fashion Director; **Gerard Khan**, Head Training

THE OTHER NOMINEES INCLUDED:

SOCH - ARVIND INTERNET

Arvind Internet's association with Soch helped the brand to digitalise its catalogues, along with allowing customers to have a seamless visibility of stock across the chain. Soch had faced innumerable issues with its offline catalogues model in the past including high cost of content creation, along with space and distribution issues. The solution that Arvind Internet proposed was titled omni-in-a-box that ensured in creating a richer format, easier navigation, seamless distribution across all stores through a digital platform. Arvind Internet also aided Soch in integrating the different technologies that it has brought into the stores, along with infusing confidence in the store staff that in-turn has ensured customer delight. The exercise involved rigorous in-house, in-room, and on the job training for about 45 days, and featured various rewards and recognition campaigns across regional executives, area sales managers and going upto the retail heads along with aligning KPIs as to who is going to get the sale and ensuring incentive for the same. The result was 6 percent store like to like growth in the pilot region in south along with increased full price sale through.

PANTALOONS

Pantaloons is India's leading value fashion retailer. It has 256 stores in 26 states covering an area of 3.6 million sq.ft., with 6,000+ employees. The fashion retailer was on rapid expansion mode. As a result, it wanted to improve the store team productivity. It wanted the store associates from back-office activities to spend maximum time on floor serving the customers. It introduced 4-key projects – Clique, Niyantran, Parivartan and Cynergy – to enhance customer experience and managing inventory at the stores. This helped in saving 80 percent of the back office activity time. There is better control of pricing and promotions at the store. There has been 25 percent increase in billing and cashier efficiency. And, the projects also helped in reducing the number of IT issues by 50 percent.

ARVIND INTERNET & LEVIS

Arvind Internet worked with Levis to introduce omni-channel technology implementation across all of their stores. While working with Levis, Arvind Internet faced a unique challenge that Levis is a 100 percent franchise owned store structure. That means, the omni-channel has to be adopted seamlessly across franchisee stores, store staff and the brand. Arvind Internet's team work hand-in-hand with Levis operation's team to ensure that it is able to break down all the barriers that stopped Levis from adopting omni-channel journeys in stores and the results was visible in certain regions upto 8 percent uplift for certain stores. Arvind Internet as a partner to Levis ensured an interrelated solution that not only implemented technology but also encompassed last mile logistic services, backend CRM, store support call centre, content management and advanced analytics.

RAYMOND

Raymond presented its loyalty program introduced by the brand to enhance customer experience through implementing Cequity ACE technology that was rolled out in 1,300 stores across every single format including the franchisee stores. The consumer was changing and he was getting more aware and discriminating in how is being engages with brands. He was seeking value and relevance in communications. Moreover, consumers relate to a brand when they are engaged across digital and traditional experiences. The adopted loyalty program helped Raymond in managing member profile, store profile, offerings and promotions at the stores, customer help desk, and reporting and analytics.



IMAGES FASHION SUCCESS STORY OF THE YEAR: MALL + RETAILER COLLABORATION

A SYMBIOTIC PARTICIPATION BETWEEN RETAILERS AND MALL DEVELOPERS, WHERE BOTH ACTED HAND IN GLOVE TO BRING-IN CUSTOMERS AT THE MALL. THE PRESENTATION-BASED SESSION HIGHLIGHTED ON THE SUCCESS STORIES OF THE COLLABORATION WHERE-IN THEY CREATED NEW SEASONS OR REASONS TO SHOP IN THE MALL, ADDED TO THE BRICK-AND-MORTAR EXPERIENCE AND/OR DRIVE-IN CUSTOMERS DURING WEEK DAYS.

Presented by:
Jesper Nielsen, Founder, Amazing Jewellery

WINNER



Infiniti Mall (Malad) & Spykar

Spykar is a brand for the young. The Culture, Spykar's event resonates very well with the high octave energy that the youth actually brings in. It helps the brand to create content with the youth – the millennial shoppers – and understand what they actually want. The event takes place across different cities and locations. It has elimination rounds and this time the finale was organized at the Infiniti Mall. The 2-day event, where the brand and the mall participated to create a business opportunity for each other. It contributed in subsequent increase in sales and simultaneously it contributed to the number of footfalls at the mall.



Received by:
Sheldon Rodricks, Spykar and **Gaurav Balani, Sr. Manager, Marketing, Infinity Mall.**

1ST RUNNER-UP



2ND RUNNER-UP



Received by:
Rohan Ladha, Regional Manager West, Adidas India **Manish Sapra, Senior Director, Retail, Adidas India**
Rajendra Kalkar, President, West at Phoenix Mills Ltd,
Prasad Rane, VP Marketing, The Phoenix Mills Ltd

High Street Phoenix (Mumbai) & Adidas

Adidas Originals collaborated with High Street Phoenix (Mumbai) and transformed a delapidated building which was once a cooperative bank into a unique concept store. The idea of the concept store was adopted from the brand's shoe box. Located in one of the key trade zone of Mumbai, the concept store is spread across 800 sq.ft., and gets an average of 220 walk-ins on any business days and makes around 5,000 Euros per sq.mt., per annum. The merchandise is reviewed every 10-12 days, in order to give the customers a lot of new options and new range within such a unique small concept store.

Palladium Mall (Mumbai) & Genesis Colors

Palladium Mall is a luxury format shopping destination. The mall collaborated with Genesis Colors and organized a 5-hour luxury shopping night. The entire experience was created to elevate sales at the mall and for retailers similar to the EOSS but without diluting on the luxury experience. The result, the mall received a good impact in terms of footfalls and consumptions. The retailers clocked in ₹5 crore in 5 hours of shopping period. At the same time, Genesis Colors got a new cluster of database which were completely untapped for the retailer and now they are engaging with that pool.



Rima Pradhan & Sunil Shroff Viviana Mall, Thane



Salim Roopani, Pacific Mall Delhi & Vivek Thilakan, Lifestyle



Vipul Sachdeva, Inorbit Mall & Vikas Bissa, Raymond



V. Muhammad Ali, Prestige Group-Mall Division



Gopinath R, Arvind Lifestyle & Rajendra Kalkar Palladium Mall

THE OTHER FINALISTS INCLUDED:

PACIFIC MALL (DELHI) & LIFESTYLE

Pacific Tagore Garden and Lifestyle has been working together for the last 8 years. Where Pacific Mall is poised to touch 1,000 crore consumption, the Lifestyle on the other hand has emerged as a number one store at the mall. The decision to shift Lifestyle from its location at Rajouri Garden to Pacific Mall Tagore Garden was not easy. But the decision did wonders for both the retailer and the mall and both worked together to make it a success. At present, Lifestyle makes ₹22 lakh of business a day compared to the Rajouri Garden store where it did ₹16 lakh a day and it is growing at 20 percent year-on-year.

VIVIANA MALL (THANE) & SHOPPERS STOP

Viviana Mall organizes an annual event, the wedding festival that spans 3-weeks. The purpose of the event is to project Viviana Mall as a one-stop-destination for all the wedding shopping. The mall creates an exclusive ambience by having wedding theme installation and providing spaces to the retailers to showcase their products. To tap the youth, the mall conducts online contests and invites entries via Facebook, and a 360-degree marketing plans which include print ads, hoardings, sms, e-mailers, digital media and in-mall branding. The result, 14 percent increase in footfall, 11 percent increase in car count and a 22 percent jump in sales on year-on-year basis.

FORUM MALL (CHENNAI) & RMKV

Forum is a pioneer shopping mall brand in India. It has 8 operational malls in Bengaluru, Chennai, Hyderabad, Mangalore and Mysore covering an area of 40 million sq.ft., with 5 more malls in construction. Forum Mall shares the highlights of its successful partnership with RMKV. RMKV is a 93 year old iconic brand, so they define heritage when comes

to silk sarees. The mall convinced RMKV to open a 55,000 sq.ft. saree store instead of its regular departmental stores. The collaboration paid off, since wedding shopping seldom happens in mall it gave the opportunity to bring in wedding shopping in the mall.

PHOENIX MALL & ARVIND LIFESTYLE

Arvind lifestyle has been participating with Phoenix Malls for the last four years. During this period, the retailer has tripled the number of stores at the malls across various colations. Today, Arvind Lifestyle has about 1.5 lakh sq.ft., of leased area with the mall and its turnover has gone up from ₹39 crore to ₹177 crore. Citing examples of GAP sale and Aeropostle activation event, where the mall extended extensive support to the retailer with people movement, set-up, event spaces outside the store and inside the store, etc., GAP sale did a business of ₹35 lakh and 7,000 walkins in the store in 3-days. The Aeropostle launch event happened over multiple days with a lot of activities.

INORBIT MALL & RAYMOND SHOP

In Trend, an annual activity was started by Inorbit Mall 3-years ago. With activities like mall anniversary, store anniversary, festivals, EOSS, etc., when sales and footfalls are high, the mall wanted to have an activity in-between the non-season time when all the promotions are over to launch the new collections of the brands and increase consumption in the mall, it launched, In Trend in the month of September. The retailers at the mall can participated and it gave them a platform in the mall wherein they launched their new collections. Inorbit Mall collaborated with Raymond Shop across its 3 malls and the retailer grew by 141 percent. The other categories contribute ₹3 crore of sales during the In Trend activity.

Jury: Dr. GHS Prasad, NIFT (Hyderabad); Jesper Nielsen, Founder, Amazing Jewellery; Joseph Leftwich, Director, Retail Management Consultant; Martin Nordlund Jenen, Partner & Director, Monili Jewellers; Hemant Sood, Business Analyst; Vineet Kanojia, Vice President - Marketing, Safexpress

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EDITORIAL CALENDAR: 2018-19

April'18

THE IFF 2018 REPORT

May'18

THE KNITWEAR ISSUE

June'18

THE SHIRTS & TROUSERS ISSUE

July'18

THE BIG DENIM ISSUE

August'18

THE WOMENSWEAR ISSUE

September'18

OCCASION, DESIGNER, WEDDING & WINTER WEAR

October'18

THE INNERWEAR SPECIAL

*Thermals * Study on Fashion Accessories

TRADE FAIR
SPECIAL ISSUES

November'18

THE ATHLEISURE, ACTIVE & SPORTSWEAR ISSUE

December'18

THE INNOVATION ISSUE:

Top 10 innovations in a) Fashion Retail Tech, b) Store Design & VM, c) Great Product Ideas, d) Fabric & Ingredient Innovation, e) Promotions

January'19

THE BRANDS IN INDIA MEGA ISSUE

February'19

THE KIDSWEAR SPECIAL

March'19

THE IFF 2019 CURTAIN RAISER

*Women's Day Focus on Women Fashion Leaders

UPCOMING BOOKS

▶ **THE SHIRTOPAEDIA: 1ST EDITION**

-The Giant Encyclopedia of Shirts
(Sept '18 at the India Retail Forum 2018)

▶ **INDIA BUSINESS OF FASHION REPORT 2019**

(March '19 at the India Fashion Forum)

Focus also on:

- ▶ Consumer Experience (CX) Innovation
- ▶ Design Innovation Showcase
- ▶ Textiles, Trims & Accessories Innovation

New Sections for 2018-19

- ▶ National Retailer in Focus
- ▶ Regional Retailer in Focus
- ▶ Fashion Startup in Focus
- ▶ Fashion Technology in Focus
- ▶ Fashion Designer in Focus

THE IFF INNOVATION CRUCIBLE: As a part of the India Fashion Forum's vision 2018-19, we shall showcase the finest, most path-breaking and consumer friendly **INNOVATIONS IN THE FASHION BUSINESS**. A key cornerstone of this mission will be to foster and support **OPEN INNOVATION**. Open innovation (a concept developed by Henry Chesbrough) encourages companies to acquire outside sources of innovation to improve product lines, shorten time lines, and to market or release internally developed innovation. Indeed, it is time to foster far reaching collaboration between enablers and innovators to catalyse Indian fashion business.

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IMAGES SOLO X PRESENTATIONS BY VIBRANT & PASSIONATE CEOs



Continuing the success of 'Images Solo X', which was started last year at the India Fashion Forum 2017, the IFF 2018 once again presented the powerful success stories of top vibrant fashion CEOs at the mega fashion event.

Images Solo X powered by Raysil, is a presentation based session where highly spirited fashion personalities made stimulating and fiery presentations in front of the jury and the audience on untold stories, mega life lessons, bold opinions, outstanding outcomes and the coming alive of big business dreams. The presentations were followed by a question and answer round by the jury.

Promoting the session for the second consecutive time, Ranjini Roy, Head, Raysil, addressed the august gathering at the mega annual fashion event of the country. Welcoming the distinguished participants at the Images Solo X session, she expressed gratitude for coming to the event and showed the willingness to share their fruitful journeys and success stories.

Felicitating the participating CEOs, she mentioned that the audience would be delighted to know how the people from different avenues of fashion businesses attained the height and how they have made their companies attain even greater height. They will be sharing their unswerving phases, firm beliefs, single-minded approach, etc., for the audiences to take life lessons from their vast experiences, she said.

Raysil is a brand from the Aditya Birla Group and is manufactured by Grasim Industries Ltd., at its 21,000 ton per annum capacity plant at Viraval (Maharashtra). Raysil is a 100 percent natural viscose filament yarn. It gives a superior drape and yet keeps the comfort. Raysil is crafted for the new age royalty. It is for the women who exude confidence much beyond what is made up. Across the world, majority of the ethnic wear and heavy garments are made from Raysil.

Inviting the audience to view their entire collection which was at display at the exhibition area, Roy offered an opportunity to partnering with everybody across the textile fraternity and take Raysil forward to be a part of their stories and successes.





IMAGES MOST ADMIRED SOLO X FASHION PROFESSIONAL OF THE YEAR

NINE OUTSTANDING PERSONALITIES FROM THE FASHION BUSINESS MADE A 3-MINUTE PRESENTATION EACH TO THE JURY AND THE AUDIENCE WAS ENTHRALLED BY UNTOLD STORIES, MEGA LIFE LESSONS, BOLD OPINIONS, OUTSTANDING OUTCOMES AND THE BIG BUSINESS DREAMS COMING ALIVE. EACH PRESENTATION WAS FOLLOWED BY A 2-MINUTE QUESTION AND ANSWER ROUND BY THE JURIES ON THEIR PRESENTATION.

All awards were presented by:
Ranjini Roy, Brand Head, Raysil

WINNER

JACQUELINE KAPUR

Co-Founder & President, Ayesha Accessories

Addressing the audience, Jacqueline Kapur talked about 'fear' and 'happiness', and how these two emotions have influenced her life, her brand and her company. Basically a brave and happy person but sometimes, she confessed, she is gripped by fear. Jacqueline has seen a lot of ups and downs, and two of them were very recent. One of them was leaving her husband and the second one was taking over the reigns of the company, Ayesha Accessories.

When she took over the company, which was not doing much business, she toyed with the thought of selling it off at a much lesser amount than it's worth.

However, she pulled herself beyond that fear and the outstanding outcome is there for all to see today, Ayesha Accessories has 70 stores, and are about to open another 20 stores. The plan for the next 2 years is to reach 200 stores and expand in India and into the Asian markets.



1ST RUNNER-UP

SANDEEP KATARIA

CEO, Bata India



Sandeep Kataria shared his lessons from the consumer market that he has learnt from his stint in four different industries. Addressing the audience, he said that firstly, the consumer does not change. When in doubt go back to consumers. Customer intimacy holds all the answers. Secondly, product is king. If the brand does not have a great product, if the brand is not innovating and moving with the time, then it will perish. Finally, people's capability comes first. For any service industry, its employees are the most critical, then comes customer satisfaction and later turnover and profit follows. So invest in employees and ensure that they are improving all the time whether they are in the store or in the office.



2ND RUNNER-UP

SARFARAZ SYED AHAMED

Founder & CEO, LKS Fashion House

A story becomes a legacy when one learns life lessons from it and this is what the untold story of LKS teaches us. LKS was started by 7 brothers in a small town of Tiruchirappalli (Tamil Nadu) in 1925. The winds of change with the wings of growth took LKS to Ceylon (Sri Lanka) in 1932, where it became the biggest gold house in South East Asia with its manufacturing unit in Ceylon alone employing 600 artisans. By 1950's, LKS had businesses in 5 districts across two countries. However, in 1963, the ethnic conflict in Ceylon forced LKS to leave everything behind. Back home in India, gold control was enforced which prohibited gold jewellery sale and to shut shops everywhere. The years of resurgence began with the government relaxing the gold control in 1967 and LKS reopened its stores to its customers. Today, LKS stands firm and strong with over 30 establishments across 7 verticals in 4 countries.



LKS
FASHION HOUSE

2ND RUNNER-UP

J P SHUKLA

CEO, Nysaa Retail – 1 India Family Mart



1 इण्डिया
फॅमिली मार्ट

J P Shukla was among the founder members of Vishal Mega Mart, TPG Wholesale, Big Bazaar and V2 Retail. He presented his business model Nysaa Retail that runs 1 India Family Mart store as his biggest business dreams. With an average store sizes that spread across 8,000 to 10,000 sq.ft., the value store operates in SEC B, C and D towns in Uttar Pradesh, Bihar and Jharkhand. Though the venture is a mere 3 years old, it has already clocked ₹250 crores turnover last year from 50 odd stores, and now it is eyeing to achieve ₹500 crores this year. With the investments made by Carpediem Capital, Nysaa Retail plans to take its store count to 80 stores by October this year and to 100 stores by the next year.



LET US TAKE A LOOK AT THE OTHER PRESENTATIONS:

NATASHA KUMAR, FOUNDER & CEO, VAJOR.COM

Natasha Kumar started her entrepreneurial journey nine years ago. Brought up in Hong Kong, she was exposed to the business of fashion from an early age. She would visit fabric mills and textile stores with her parents in Hong Kong and China. While sharing a few learnings from her entrepreneurial journey, she said that sticking to the brand story is extremely important when trends are changing month on month basis. Being a western wear homegrown brand, they faced quite a few rejections when they started. However, they used those rejections to motivate themselves. And, finally to rise above the product. She shared, "Product is the king but experience is the future. We have built a brand that just not only produces but make experiences for the consumer."

PARAG DANI, CEO, PREMIUM & BRIDGE TO LUXURY BRANDS, ARVIND BRANDS & RETAIL

Parag Dani shared his opinion on the evolving corporate structure and explained to the audience that like the Olympics motto – *citius, altius and fortius* – meaning faster, higher, stronger, likewise a corporate should also aspire to build an organisation that churns out success and great products. Conveying his message through the means of sports institutions where athletes and sportsmen are undergoing major transformation due to the changing requirement of the games, similarly a corporate organisation should modify its key management positions to have the right pool of people. The organisation or institution should introduce conditions and changes so that the performance can be enhanced. And, finally has mindset of the management has to evolve to really succeed.



ROHAN BATRA, MANAGING DIRECTOR, CRAVATEX BRANDS

Sharing an untold story with the audience, Rohan Batra read out a letter written by his grand father to the Rotary Club of Mumbai that was passed to him by his father as a piece of advise when he joined the business. On being asked about the one single factor that played a vital role in his grandfather's life, which marked the turning point, his grandfather had written back to the club mentioning the challenges and struggles he had faced after moving from Pakistan to India during partition. He took up a business of dyeing and dry cleaning, which was much looked down upon and wanted to join one of the oil companies that were considered coveted in those days. But his father advised him to remain in the business and to face all the hurdles until he succeeded. He counselled never to run away from challenges and not to leave things midway.

TUSHAR VED, PRESIDENT, MAJOR BRANDS

Tushar Ved shared his bold opinions on the retail scenario and the competing e-commerce business to the audience. Talking on the competition between e-commerce and retail, he said that retail is not dead rather many e-commerce portals have opened stores recently such as Myntra, Nykaa, Lenskart, etc., and internationally Amazon is buying Whole Foods. Moreover, Ved expressed that smaller concept stores are in nowadays. A lot of large concept stores are opening small stores to reach out to more consumers through click and collect model. The concept is simple and easy for the customers to pick up. "Retail and online will grow together and co-exist. Only retail or only online is not going to give you the desired growth. And the experience at the stores will matter," concluded Ved.



VIVEK BALI, COO, SEPHORA INDIA

Vivek Bali shared his mega life lessons that he had learnt from his father, who was an Indian Air Force pilot, and how he applied those lessons in his professional arena. Since childhood he has been trained to perform and execute and show strength at tough times. Bali suggested that there are ethical practises, which the retail industry needs to follow. There are certain retailers – online and offline – selling brands without permission and bring in brands from overseas secretly that needs to be curtailed. "Delivering a superior brand value, elevating the shopping experience, offering top quality product and packaging, best in class merchandising, training and development, and extremely critical is the DNA of your brand, values of your brand and the attitude towards the customers," said Bali.

Jury Chair: B S Nagesh, Founder, Ttrain & Ranjini Roy, Head - Marketing, Consumer Products Division, Aditya Birla Group - Grasim Industries Ltd.



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- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

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All Inclusive Annual Fee (GST extra)	₹10,000	₹30,000	₹50,000	₹1,00,000	₹1,50,000
Advertorial in Member's special issue	NA	NA	NA	1 Page, PR value worth ₹75,000	2 Pages, PR value worth ₹1,50,000
Feature/s, editorial coverage subject to Editorial guidelines in relevant Images Publication/ Research Books/ coffee table books print/online (Data & information to be provided by members)	Subject to editorial approval	1 Page, PR value worth ₹75,000	2 Pages, PR value worth ₹1,50,000	5 Pages, PR value worth ₹3,75,000	8 Pages, PR value worth ₹6,00,000
Promo Banners in Indiaretailing.com portal /EDM (applicable as per category)	NA	Up to ₹30,000	Up to ₹50,000	Up to ₹1,00,000	Up to ₹1,50,000
Entry Pass for India Fashion Forum Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Show	1 Pass free worth ₹15,000	1 Pass free worth ₹20,000	2 Passes free worth ₹40,000	4 Passes free worth ₹80,000	6 Passes free worth ₹1,20,000
Special Invite for Power Breakfasts & Networking Lunches	NA	1 Pass	2 Passes	4 Passes	6 Passes
Awards & Gala Dinners	NA	1 Pass	2 Passes	4 Passes	6 Passes
a. Research Reports & Publications-Print & eReport b. Publications Subscription - Print & eMagazine (Business of Fashion & Images Retail)	E-Subscription : ₹3,000	a. Research Reports worth ₹5,000 b. Subscription : ₹1,800	a. Research Reports worth ₹10,000 b. Subscription : ₹1,800	a. Research Reports worth ₹20,000 b. Subscription : ₹1,800	a. Research Reports worth ₹35,000 b. Subscription : ₹1,800
Business connects	NA	10 connects, worth ₹5,000 per connect	15 connects, worth ₹5,000 per connect	30 connects, worth ₹5,000 per connect	50 connects, worth ₹5,000 per connect
CEO's picture & profile in 'Who's Who' page on indiaretailing.com website	NA	Yes, PR value worth ₹1,00,000	Yes, PR value worth ₹1,00,000	Yes, PR value worth ₹1,00,000	Yes, PR value worth ₹1,00,000
Speaker / Panel discussion opportunities (Subject to availability of slots)	Subject to board approval	Yes	Yes	Yes	Yes
Presence at India Fashion Forum website	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000
Images Fashion Awards processing fee	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)
Lounge Access at India Fashion Forum	Space for business meetings	Space for business meetings	Space for business meetings	Space for business meetings	Space for business meetings
Catalogue wall at India Fashion Forum	Display & distribution of catalogues/ company brochures (Quantity 50 worth ₹5,000)	Display & distribution of catalogues/ company brochures (Quantity 100 worth ₹10,000)	Display & distribution of catalogues/ company brochures (Quantity 150 worth ₹15,000)	Display & distribution of catalogues/ company brochures (Quantity 200 worth ₹20,000)	Display & distribution of catalogues/ company brochures (Quantity 250 worth ₹25,000)
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NEXT ISSUE:

THE KNITWEAR SPECIAL

The coming issue of Images BoF unearths the potential of knitwear in India, and underlines the opportunities that lie ahead.

Over a century ago, the city of Kolkatta kickstarted the knitwear industry in India. Today, the industry has expanded to all corners of the country, with the City of Joy still leading the pack with its expertise in knitted innerwear. Major developments are also underway in the other big hubs of knitwear in India including Ludhiana, Tirupur, Delhi, Bengaluru, Mumbai and Vapi. Besides these mega hubs, the industry is expanding fast across upcoming units in Gujarat and Rajasthan.

Extremely practical qualities of comfort, stretch ability, and easy care have seen knitted product categories rapidly penetrating into upper wear and now growing in strength in bottom-wear as well. As on date, knitwear also dominates Indian exports.

In the May 2018 issue of IMAGES BoF, we debate the following in knitwear in India:

- >> Size and Positioning of the Industry
- >> The Key Segments and Clusters
- >> The Opportunities and Challenges
- >> Top Market & Fashion Trends
- >> The Leaders and their Potions of Success
- >> The Latest Developments

ALSO IN THE ISSUE:

- >> A Report: Milano Unica 2018
- >> Kantar: Research
- >> Microsoft on Fashion

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