



FASHION FORWARD

JOURNAL 2013

TOM TAILOR GROUP

FASHION FORWARD

FOUR STRONG BRANDS OFFERING ON-TREND FASHION FOR ALL AGE GROUPS, THROUGH OUR 1,350 STAND-ALONE STORES IN CENTRAL LOCATIONS AS WELL AS AN ONLINE STORE FOR EACH BRAND. ON TOP OF THAT: A CONSPICUOUS MEDIA PRESENCE, RANGING FROM TV SPOTS THROUGH TO A LIFESTYLE BLOG. OUR CUSTOMERS LIKE US – AS IS BORNE OUT NOT LEAST BY OUR REPEATED DOUBLE-DIGIT REVENUE GROWTH IN 2013. OUR INTERNATIONAL TEAM CLOTHES PEOPLE TODAY AND ANTICIPATES THEIR WISHES FOR TOMORROW. WE ARE IN DEMAND, AND WE ARE GROWING DYNAMICALLY. THIS PUTS US ON COURSE FOR FUTURE SUCCESS. IN OTHER WORDS: WE ARE FASHION FORWARD.

**2013
ANNUAL REPORT**



WWW.TOM-TAILOR-GROUP.COM



01

4 YOU: OUR 4 BRANDS HIT THE SPOT.

Our 4 brands target all relevant age groups.



p. 4

04

SHORT AND SWEET: OUR PRODUCTION TIMES PUT US AHEAD.

Sophisticated logistics processes make sure that hot fashion trends hit the shops faster.



p. 34

02

A MAJOR HIGH STREET PRESENCE: OUR SHOPS ARE PRESENT EVERYWHERE.

With over 1,350 stand-alone shops, we are now an integral part of the city-centre scene.



p. 18

OUR FIGURES AT A GLANCE

Our success and our strength are measurable. The TOM TAILOR GROUP is a key player in the European fashion industry.



p. 26

03

AN INTERNATIONAL TEAM: OUR STAFF THINK GLOBALLY.

Employees from 56 countries understand our customers and manage up-to-the-minute trends.



p. 28

05

ON THE SCREEN: WE ARE GETTING OUR MESSAGE ACROSS.

In print and online, we are reaching our target groups.



p. 42

01

4
YOU

**OUR 4 BRANDS
HIT THE SPOT**

TOM TAILOR, TOM TAILOR DENIM, TOM TAILOR POLO TEAM and BONITA –
the TOM TAILOR GROUP's four strong brands create a coherent world. Each brand has its own handwriting and at the same time follows an overarching principle: mid-price fashion for people who value quality and style. Our brand concepts enable us to appeal equally to men and women, from age 0 to 60 – they feel that we understand them. That is the ideal basis for us to continue our successful development in the future.



TOM TAILOR

TOM TAILOR meets the needs of target groups aged from 0 to 40 with its TOM TAILOR MEN, TOM TAILOR WOMEN, TOM TAILOR KIDS, TOM TAILOR MINI and TOM TAILOR BABY lines.

TOM TAILOR *Denim*

TOM TAILOR Denim comprises the TOM TAILOR Denim Male and TOM TAILOR Denim Female lines.

These collections are aimed at teenagers and young adults between the ages of 15 and 25.

TOM TAILOR **POLO TEAM**

TOM TAILOR's third brand, TOM TAILOR POLO TEAM, was launched on the market in 2012. The premium sportswear brand is targeted at men and women aged 25 to 40.

BONITA

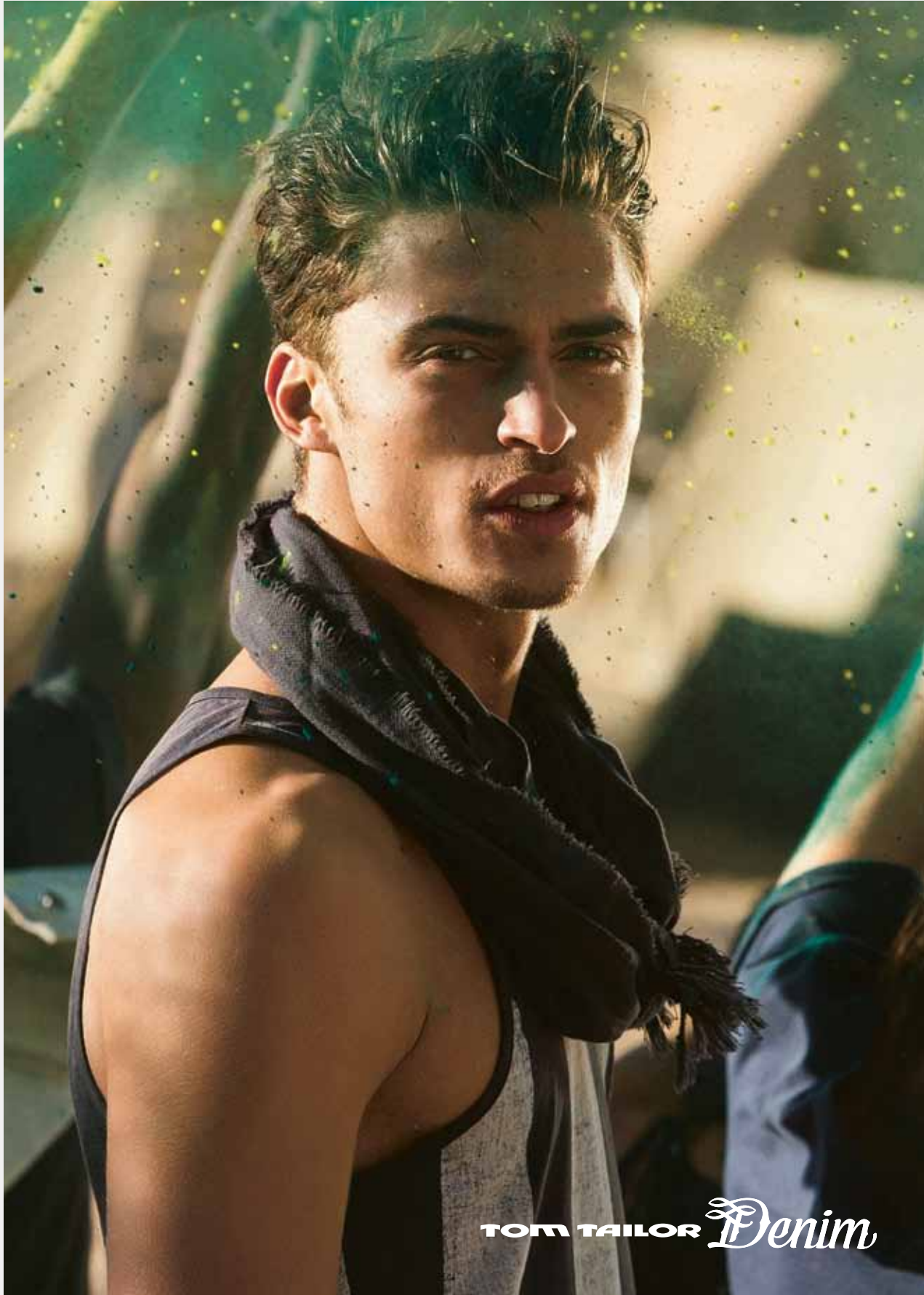
The TOM TAILOR GROUP's BONITA and BONITA men brands offer clothing for women and men in the over-40 age group. The BONITA collections are based on high-quality items of clothing that can be mixed and matched over and over to create new outfits.





TOM TAILOR











TOM TAILOR





BONITA





TOM TAILOR *Denim*

«It's awesome that I can buy the clothes that I see in current TV shows here and now. And the price is great, too.»

ANNIKA WÖSSNER (21)
WEARS TOM TAILOR DENIM



TOM TAILOR *Denim*



TOM TAILOR

«The best thing about it is that my outfit works in any situation. I often go directly from uni to a band rehearsal or a party.»

FELIX HAUSMANN (22)
WEARS TOM TAILOR DENIM

LEO GRIMM (5)
WEARS TOM TAILOR KIDS

OUR 4 STRONG BRANDS ON THE URBAN CATWALK

From sporty/casual, through cool/trendy, to timeless/modern – the collections from TOM TAILOR, TOM TAILOR Denim, TOM TAILOR POLO TEAM and BONITA are as varied as the people who wear them. But they all share high standards of quality and style.



TOM TAILOR

«I am very fashion-conscious and I prefer casual wear. At TOM TAILOR, I find clothes that suit my style exactly.»

CHRISTOPH FELD (33)
WEARS TOM TAILOR



«I travel a lot, both for work and privately. So my clothes have to be sporty, casual and modern, but not too trendy. TOM TAILOR POLO TEAM offers a good mix.»

HANNES BAUMGÄRTNER (35)
WEARS TOM TAILOR POLO TEAM

«TOM TAILOR POLO TEAM is the perfect brand for me. I like it because it's chic and sporty. It's just great.»

STEFANIE MARAN (30)
WEARS TOM TAILOR POLO TEAM



MARTINA SEELBACH (32)
WEARS TOM TAILOR



«The BONITA collections are up-to-date but don't try too hard to look young – that suits me perfectly. And the shopping experience in the new BONITA shops is great, too.»

GABRIELE SCHUSTER (49)
WEARS BONITA



MICHAEL CAMARA (54)
WEARS BONITA

02

A MAJOR HIGH STREET PRESENCE

OUR SHOPS ARE
PRESENT
EVERYWHERE

Hamburg, Cologne, Munich, Berlin – but also Aachen, Husum, Jena and Tübingen – our shops are now part and parcel of most pedestrian zones and shopping centres in Germany. People now expect to find TOM TAILOR and BONITA in German city centres – and increasingly also in other major European cities such as Zurich, Zagreb, Lyon or Vienna. But our presence is not limited to just our stand-alone shops. Our TOM TAILOR brand is also a key element in large department stores and fashion chains, where we are continually expanding the number of our shop-in-shops.



TOM TAILOR FLAGSHIP STORE,
DÜSSELDORF





Super Gentle





TOM TAILOR



2,269

TOM TAILOR
shop-in-shops at
the end of 2013

OVER 1,350 SHOPS IN CITY CENTRES AND SHOPPING MALLS

The high street in many Germany cities would be unthinkable now without our 720 TOM TAILOR and BONITA shops. We also have some 630 stores abroad.



354

TOM TAILOR retail stores

TOM TAILOR FLAGSHIP STORE,
DÜSSELDORF



1,010

BONITA stores at the end of 2013

BONITA STORE,
OBERHAUSEN

OUR BONITA STORE MODERNISATION PROGRAMME

Making the brand come alive: in September 2013, we began to revitalise our 1,010 BONITA stores. We focused particularly on clearly presenting items, both in the stores and in the shop windows. At the same time, the stores were given a complete makeover.



BONITA STORE,
HAMMINKELN



HEIDI HOLLING, MANAGER
BONITA STORE, HAMBURG

WHAT DO YOU THINK OF THE NEW BONITA STORE CONCEPT?

The revitalisation process did us good – it is as if there's a breath of fresh air in the shops now.

WHAT WAS IT LIKE FOR YOU AND YOUR COLLEAGUES DURING THE RENOVATIONS?

The TOM TAILOR GROUP had presented us with a well-thought-out concept beforehand. The renovation work itself also went smoothly, and our staff were able to get on with their work as normal.

WHAT DID YOUR CUSTOMERS THINK OF THE CHANGES?

They were absolutely delighted. Again and again people said how attractive they find the new store design. They particularly appreciate how the informal atmosphere in the shops has been retained alongside the new furniture and the new look.

WHAT DO YOU WANT TO SEE HAPPEN IN THE FUTURE?

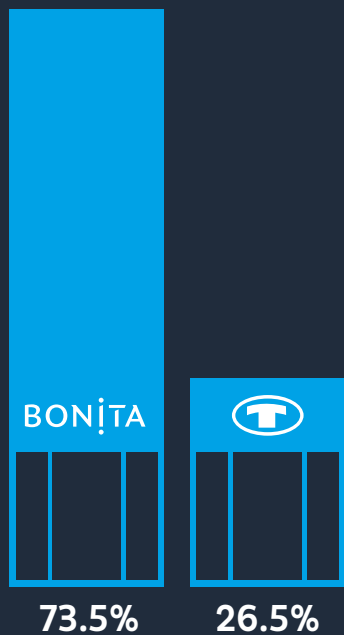
That even more customers will be thrilled by our fresh mixture of comfort and modernity.



BONITA

54

BONITA
BONITA
BONITA



1,364

RETAIL STORES AND E-SHOPS WORLDWIDE

... 1,010 BONITA and 354 TOM TAILOR stores. By acquiring BONITA in 2012, we reached critical mass in terms of shops. There is hardly a single town in Germany now without a BONITA or TOM TAILOR store.

TOM TAILOR

OUR FIGURES

6,500

EMPLOYEES

... from 56 countries. Germany is where we were founded and where our growth started, but now we are at home all over the world, not just because the proportion of revenue we generate abroad has increased and our international stores are getting bigger and bigger. What's particularly important is the diversity of our employees, who ensure our fashion offering combines trends from around the world.



€16.50

OUR SHARE PRICE AS AT 31/12/2013

TOM TAILOR's share price has increased by 26.9% since the IPO in 2010. A clear strategy, excellent business development and transparent reporting procedures have all contributed to this.

OVER
€900 MIO.

IN REVENUE

The business has developed extremely well in recent years, as can be seen from our figures. Following our systematic expansion, our entire focus now is on profitability.



24-28

WEEKS' LEAD TIME

Our finely tuned logistics processes ensure smooth operations. We have successfully cut our lead times – the period from initial design of a garment until it hits the shops – in the past. Meaning we can ensure new trends reach the stores more quickly.

TOM TAILOR GROUP
AT A GLANCE

3,800
BROADCASTS

... of our new TV advertising spot and 256 newspaper articles about the TOM TAILOR GROUP in 2013. TOM TAILOR is one of the ten best-known fashion brands in Germany. Our major TV campaign in the last couple of years has increased recognition still further.

03

AN INTER- NATIONAL TEAM

OUR STAFF THINK GLOBALLY

Chic, on-trend, fashionable. The world of fashion is cosmopolitan.

Regardless of where a company is based, where a particular designer comes from, or the city where a new collection is presented, fashion is inherently international. This is also fundamental to our philosophy, as can be seen from these simple figures: we have staff from 56 countries, 630 stores abroad (and growing) and trend scouts across the world. We know our way around the international fashion industry and that our customers have international expectations – which we can meet. In many languages.



DON'T FOLLOW, EXPLORE

56 NATIONALITIES IN A COSMOPOLITAN TEAM

Fashion can only be as international as the team that designs and sells it. Whether we're talking about trend scouts, designers, or specialist staff from human resources or financial control, our 6,500 employees come from all across the world and work together hand in hand.



«Our trend scouts send in ideas for our fashion designs from all over the world and we consolidate them in our design studio in Hamburg.»

PATTIMA BÄHR FROM THAILAND,
DESIGN



«Merchandise Planning is a combination of figures, products and trends.»

ABRAHAM TADESSE FROM ETHIOPIA,
MERCHANDISE PLANNING
DEPARTMENT/TOM TAILOR RETAIL



YASMIN MÜLLER-SALLAM
FROM GERMANY/EGYPT,
LICENCE PRODUCT MANAGEMENT



LENA BATISTA FROM PORTUGAL,
PROCUREMENT E-COMMERCE TOM TAILOR



»At the Group's head office, we are sent the figures for all our companies in Germany and abroad. We all have to follow a single set of rules. You can definitely notice the cultural differences as you correspond with people. But that's what makes it so exciting.«

BAKTAS DOST
FROM AFGHANISTAN,
CENTRAL CONTROLLING



OLGA VASYLENKO FROM THE UKRAINE,
SALES AND CUSTOMER SERVICE GREATER RUSSIA



«It is always exciting to deal with different markets – every country has its own conditions and balancing all these at the same time is a real challenge. Today, TOM TAILOR is represented in over 35 countries, so life is never boring.»

RICHARD HOLDER FROM SOUTH AFRICA,
INTERNATIONAL SALES

EMPLOYER BRANDING

All employees of the TOM TAILOR GROUP have the potential, the will and the intrinsic drive to turn the Company into one of the most important fashion companies in Europe, while retaining the spirit and dynamic of a start-up company – which is synonymous with our employer brand.



WORLD CAFÉ
EMPLOYER BRANDING

WE VALUE

1

**BREAK THE RULES OF THE
MARKET**

7

**BURN WITH PASSION FOR
THE WORK**

2

**SHOW RESPECT FOR THE
PERFORMANCE OF OTHERS**

8

BE PREDICTABLE AND JUST

3

LOVE FASHION

9

CELEBRATE SUCCESSES

4

TAKE ON RESPONSIBILITY

10

**SEE CHANGE AS AN
OPPORTUNITY**

5

**BE CLEAR
AND STRUCTURED**

11

**ALWAYS SET YOURSELF
NEW GOALS**

6

**COMMUNICATE
AGGRESSIVELY**

DON'T FOLLOW. EXPLORE.

04

**SHORT
AND
SWEET**

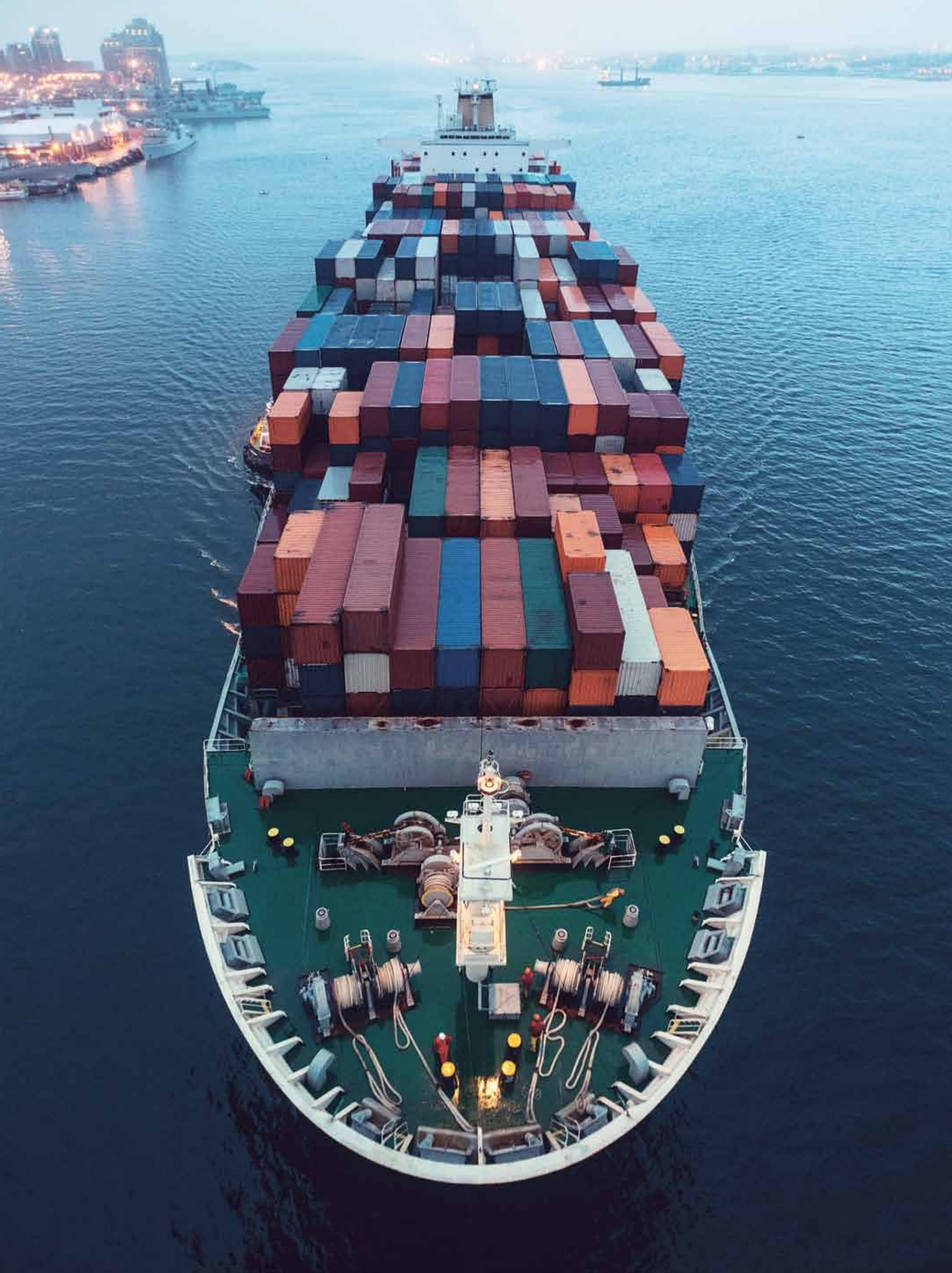
**OUR
PRODUCTION
TIMES
PUT US AHEAD.**

Success in the world of fashion means being fast.

Very fast. Our trend scouts have their fingers on the fashion pulse, and we know how to produce to their timescale.

The maximum lead time – the period from design to the delivery of new garments to our shops – is 28 weeks. We have radically optimised our processes in recent years, to make sure that our fashion offering is always bang up-to-date in our customers' eyes.

That is practically a guarantee of success in our competitive market.







FROM CATWALK TO SHOP IN UNDER 28 WEEKS

It normally takes only 28 weeks for catwalk trends in the fashion centres of New York, Tokyo, London and Paris to arrive in the various TOM TAILOR GROUP selling spaces. And for up-to-the-minute spot items the process is much faster.



New York, 1 p.m.
Trend scouts at work.



WEEK 1 →

Hamburg, 11 a.m.
Beginning to develop new styles.



WEEK 5 →

Hamburg, design centre, 3 p.m.
First models are there.



WEEK 10 →

Hong Kong, 9 a.m.
Materials meet our expectations and standards.



WEEK 15 →

Hamburg, 5 p.m.

The new items arrive in Hamburg.



WEEK 16 →

Hamburg, 7 p.m.

The new collection is also presented to customers in the TOM TAILOR showroom.



WEEK 18 →

Asia, 10 a.m.

Production is in full swing.



WEEK 28

Munich, 7 p.m.

The new collection is as cool as the shop: stock on the shelves in the Munich flagship store.





Presenting the collection in Hamburg

Every quarter, the TOM TAILOR sales teams receive a «Product Statement» for the month in question. Starting in 2013, each new key collection now receives its own individual stage set, based on the graphic themed displays in all our showrooms, in the stores in our key markets in Germany and abroad, and in the entrance area at TOM TAILOR's headquarters.

05

ON THE SCREEN

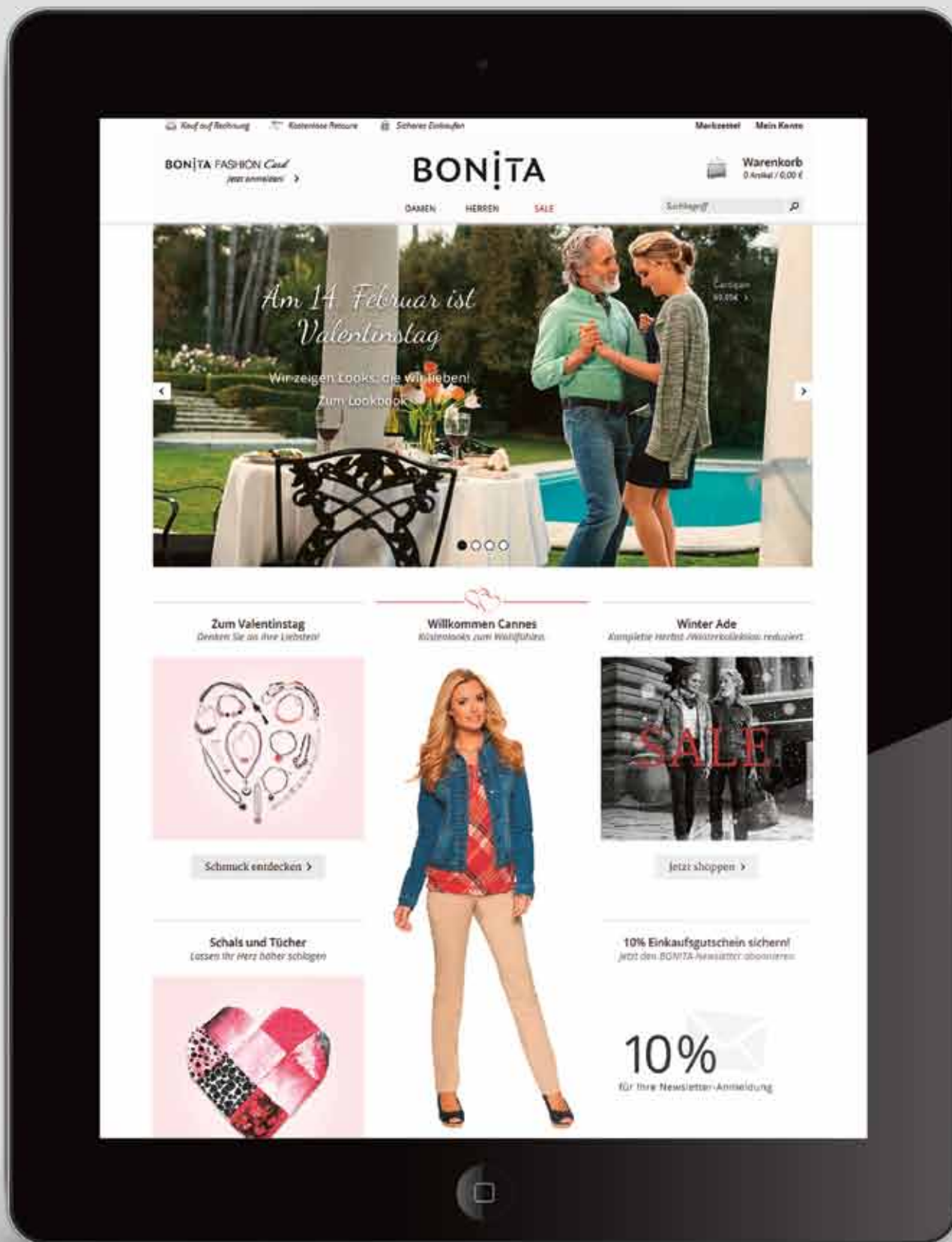
WE ARE GETTING OUR
MESSAGE ACROSS

What does it mean when someone hums the tune from an advert?

At the very least, that the brand and its products are reaching their target market. The systematic, cohesive communications strategy for our umbrella brands is aimed both at the mid- to long-term and the multifaceted. Combining PR, new media and classic advertising, our strategy aims to increase our reach and to anchor the brand permanently in the minds of consumers. The result is that today TOM TAILOR and BONITA are brands that are talked about. Or hummed.



SANDRA VON RUFFIN,
TRIBUTE TO BAMBI CAMPAIGN



BONITA online shop

BONITA and BONITA men have also been available online since June 2013. The entire collections for both brands can be browsed at www.bonita.de (available in German only). The Company is focusing on expanding its customer portfolio with the BONITA e-shop, and on reinforcing the BONITA brand's image and brand awareness with its online presence. The e-shop enables the Company to connect with the fastest-growing online customer group, mature consumers. Members of this target group have high purchasing power and are particularly keen consumers.



WWW.BONITA.DE



The BONITA FASHION Card

By the end of December 2013, over 390,000 people had registered for the BONITA FASHION Card introduced at the beginning of the year. FASHION Card holders receive exclusive vouchers and can participate in special promotions. More information on the exclusive advantages and an online registration form are available at www.fashion-card.bonita.eu

COUNTLESS MEDIA HITS EVERY DAY

Be it via our website or our online shops,
we get through to our
customers and our customers get through to us.
Not just in our stores, but across all media.



3,800

broadcasts
of the TOM TAILOR
TV spot



256

newspaper articles
about the
TOM TAILOR GROUP



>20 mio.

online customers visited
the TOM TAILOR and BONITA
e-shops

THE TOM TAILOR E-SHOP - A SUCCESS STORY

In the TOM TAILOR online shop, our customers can order any items they choose from the entire range.

This platform is an ideal sales tool which appeals to our young, lifestyle-oriented target group.



€39.6 mio.

TOM TAILOR
e-commerce revenue in 2013



645,000

registered online customers in
the TOM TAILOR e-shop



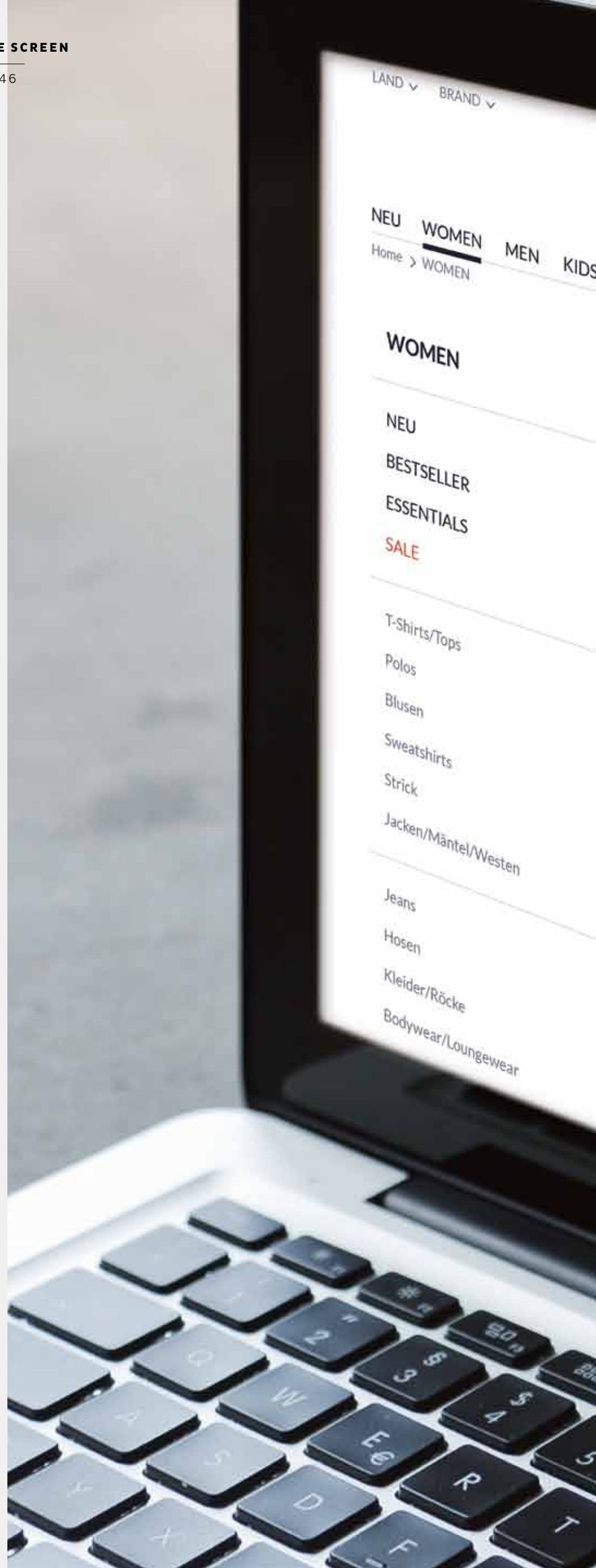
12%

revenue growth year-on-year



10%

of Group revenue –
the medium-term target for
e-commerce revenue





Neu!

DIESE WOCHE 15 NEUE ARTIKEL
Jetzt ansehen >

Suchbegriff...



NEUE KOLLEKTION
FRÜHJAHR 2014
WOMEN >



The TOM TAILOR Collectors Club Card

TOM TAILOR Collectors Club Card holders can take advantage of exclusive promotions. In addition, they collect points with every purchase which are credited to their Collectors Club account. As soon as they have reached 20 points, customers receive a voucher worth EUR 10 to redeem against their next order or store purchase. And when a new customer joins the Collectors Club, he receives a one-off 10% discount on his initial purchase. The TOM TAILOR Collectors Club Card is free and does not require a minimum spend. At the end of 2013, the TOM TAILOR Collectors Club Card had 362,819 registered customers.



Reinvent yourself!
TOM TAILOR TV spot

This was the slogan used by the TOM TAILOR GROUP to kick off the 2013 autumn/winter season. As in TOM TAILOR's previous TV spots, the spotlight was on the desire for the latest fashion must-haves. The actors constantly reinvented themselves in the spots, shedding their old outfits and re-emerging in brand new TOM TAILOR looks. All of the stories are set against well-known backdrops in New York City. The spots were broadcast on ProSiebenSat.1 Media AG channels.



TRIBUTE TO
BAMBI
HILFE FÜR KINDER IN NOT
CHARITYPARTNER 2013



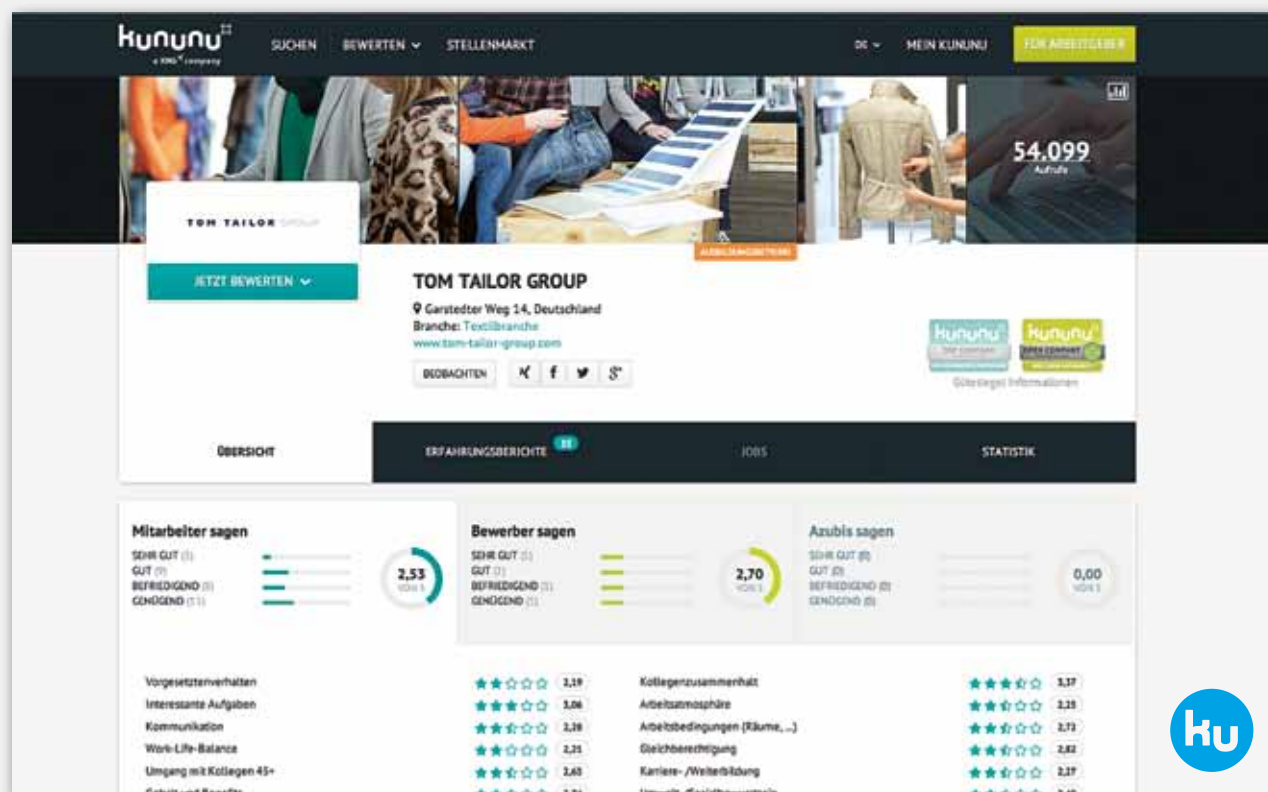
WWW.FACEBOOK.COM/TOMTAILOR



WWW.YOUTUBE.COM/USER/TOMTAILOR



WWW.XING.COM/COMPANY/TOMTAILORGROUP



WWW.KUNUNU.COM/TOMTAILORGROUP

REPRESENTED ON ALL RELEVANT DIGITAL PLATFORMS

With our Facebook, LinkedIn and Twitter presence, as well as the Company's website, we are completely at home in the digital world. This means we are extremely well positioned both to meet the requirements of our target groups and to continually increase the number of potential customers.



TWITTER.COM/TOMTAILOR



WWW.LINKEDIN.COM/COMPANY/TOM-TAILOR-GROUP



WWW.FACEBOOK.COM/BONITAFASHION



WWW.YOUTUBE.COM/USER/BONITAFASHIONDE



TOM TAILOR GROUP


TOM TAILOR

TOM TAILOR *Denim*

TOM TAILOR
POLO  TEAM

BONITA