

# THE INDIAN FASHION SCENARIO

TRIGGERS, TARGETS, TRENDS & TIPS

2009



## THE INDIAN FASHION SCENARIO FOREWORD

In the globalised era, the apparel and accessory segment in India, like many other traditional product segments, is undergoing an astounding change of perception. While it continues to enjoy the position of being an enhancer of beauty, the new-age consumer perceives fashion as a must, manifesting the wearer's attitude, personality and lifestyle.

Fashion is now an important new sales driver in India, and domestic and international brands are scrambling to adjust their designs to cater to the Indian market. A host of variables - the buying occasion, the wearing occasion, the economic strata of the target segment and the effect of regional and religious influences on all of them are now being juggled to find the winning mix.

With mounting western influence, and a focus on revival of traditional Indian fashion elements, diversity in India sees new faces. The Indian fashion stage is a reflection of deep cultural influences, the consumer shift in the new economic scenario, and changing social perceptions. It indicates the birth of new and distinct target groups that ride on various influences to set new trends. Understanding these influencers and the various target group characteristics are key to setting foot in the Indian fashion industry. Read on to find out more about this potential landscape.

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## INDIAN FASHION A RICH AND VARIED TEXTILE HERITAGE



India has a rich and varied textile heritage. Each region of India has its own unique native costume and traditional attire and accessories. In India, the mix of language, food and culture changes every 80-100 kilometres, making it's fashion as diverse as the culture and tradition of the country.

Fashion in India covers a whole range of clothing from ornate clothes designed for wedding ceremonies to prêt lines, sports wear and casual wear. Traditional Indian techniques of embroidery such as chikhan and zardosi, and traditional weaves and fabrics have been used by Indian designers to create Indo-western clothing in a fusion of the East and West, allowing the young urban Indians to choose from the best of both worlds.

Traditional costumes in India vary widely depending on the climate and natural fibres grown in a region. In the cold northern state of Jammu and Kashmir, people wear a thick loose shirt called a 'phiran' to keep them warm. In the tropical warmth of south India men wear a sarong like garment called the 'mundu', while women drape 5 meters of cloth around their bodies, in the graceful folds of the sari. Saris are woven in silk, cotton and artificial fibres. Kanjivaram, Mysore, Paithani, Pochampalli, Jamdani, Baluchari, Banarasi, Sambalpuri and Bandhini are some varieties of beautiful saris from different regions of India. In the dry regions of Rajasthan and Gujarat, men wrap and twist a length of cloth in the form of a dhoti around their lower limbs, and a shirt-like kurta above. Colorful turbans complete the picture. In the northeastern regions, the tribal communities such as Khasis, Nagas, Mizos, Manipuris and Arunachalis wear colorful woven sarong-like clothing and woven shawls, that represent the identity of each tribal group. In urban India the salwar kameez and the churidar kameez are commonly worn by women, and the sari is worn on formal occasions. The sari, however, is an element of the daily wardrobe for most married women in the South. Men wear kurtas and pajamas, or a sherwani for formal wear. Western wear such as shirts and trousers are commonly worn by men across India. Jeans, t-shirts, capris, bermudas and various kinds of casual clothing are worn by the young and the young at heart, who are the trendsetters of fashion in India.

## INDIAN FASHION FASHION CLASSICS



No matter how many styles and trends come into the limelight, the Indian sari never loses its grace, beauty and elegance. Indian women wearing a sari look graceful, stylish, elegant and sensuous. This beautiful fashion attire has spanned ages in India, and still exists as the quintessential element in every Indian woman's wardrobe. The sari is a simple attire that consists of a single, rectangular piece of material that constantly changes in looks, styles, designs and fabrics from generation to generation. Indian saris come in a range of fabrics starting from cotton to silk, georgettes to crepe and many more. These saris are adorned with various embellishments like mirror work, zari, embroidery, zardosi, sequence, patch work, pearl work, kundan etc. The most popular Indian saris are Banarasi, Kanjeevaram, Bandhej, Chanderi, Chikan, Hakoba, Handloom, Baluchari, Patola, Phulkari and Parsi saris.

Another very popular and widespread Indian attire is the salwar kameez. The drift from saris to salwar kameez in Indian women is evident. More and more women prefer to wear the salwar kameez, because it is more convenient for daily wear. Saris are now worn for special occasions only by many. This has given a boost to the Indian salwar kameez industry. Hence many fashion designers in the country are focusing on this beautiful outfit, trying to provide consumers with some of the most unique and exquisite collections of salwar kameezes. Zardosi work on salwar kameezes is evergreen. This dress provides opportunities for a lot of fine embroidery and other ornamental work.

1. One of the latest styles in the sari
2. Salwar kameez
3. Showcasing fusion styles of the sari and contemporized versions of other classics

# FASHION TODAY A BLEND OF WESTERN AND INDIAN WEAVES



While traditional clothes are still worn in most of rural India, urban India is changing rapidly, with international fashion trends adopted by the young and glamorous, in the cosmopolitan metros of India. Today, fashion in India is a vibrant scene, a nascent industry and a colourful and exciting world where designers, models and Bollywood stars start new trends every other day.

A huge shift is underway from spending on necessities such as basic food and clothing to choice-based spending on categories such as branded clothes, lifestyle and restaurants. Households that can afford discretionary consumption will grow from 8 million today to 94 million by 2025.\* The comparative research over the years show that long-established spending attitudes are already changing rapidly. Branded clothes are becoming de rigueur for the wealthiest Indians. Christian Dior, Louis Vuitton and Tommy Hilfiger already have a presence in the country. Gucci, Armani and Versace are on their way. For generations, Indians did their daily shopping at fresh-food markets and regarded packaged foods as "stale." However, just like their Western counterparts, a new generation of busy urban Indians is starting to appreciate the convenience and choice offered by packaged foods. Likewise, many Indians have traditionally viewed gold jewellery as a safer way to save than banks. But young Indians today are likely to see jewellery as a fashion statement, not a savings plan. They are also increasingly comfortable using credit cards. The share of Indians who carry plastic has quadrupled since 2001. As the seismic wave of income growth rolls across Indian society, the characteristics of consumption are changing, and will continue to change dramatically over the next 20 years. Fashion awareness is increasing as well. Now fashion is no more a monopoly of the starlets or just confined to rich people. Even common college going boys and girls or men and women working in a corporate environment, follow the latest trends and wear designer attire as daily office wear or casual wear, unlike a decade ago.

Today, India has emerged as the third most attractive market destination in the world for fashion apparel retailers.\* Insight Instore takes a journey through the world of Indian fashion in the following pages.

## INDIAN MACRO TRENDS & SUB TRENDS

# 1. HAUTE MELTDOWN

The economic meltdown influences Indian fashion and streets. It challenges the potential of Indian designers, stylists and fashionistas, leaving an opportunity for all to fuse, reuse, and innovate.

From shrinking their collections to slashing prices, Indian fashion designers are trying to cope with the global financial crisis, which has dimmed the appetite for haute couture, internationally and at home. Indian designers chose the economic meltdown as a recurring theme at the Wills Lifestyle India Fashion Week, one of two premier fashion events that ran concurrently in New Delhi. Customers, usually at the receiving end, are also being creative in picking styles and giving ideas to designers.



1.



2.

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1. Shilpa Chavan's latest exhibit titled Mumbadevi fashioned from everyday objects found in Mumbai
2. Reversible couture from Rahul Mishra's latest collection titled 'Reversing the Recession'

## INDIAN MACRO TRENDS & SUB TRENDS

### 1. HAUTE MELTDOWN

#### 1.1 DOWNTURN DRESSING

Designers are using the economic slowdown as a source of inspiration for their upcoming Autumn/Winter collections.

Rahul Mishra's latest collection is titled '**Reversing the Recession**'. Mumbai-based Mishra is offering what he calls "buy one get one free", because his line is full of reversible garments, much like the ones he has showcased in the past.

Kiran Uttam Ghosh's, '**Frugality is the new Black**' collection combined high-street cheap leggings with very luxe jackets and basic T-shirts with luxury shawls.

Raghavendra Rathore's collections for men and women will lean to the left, to **mirror the economics and politics of the times**. "In a normal garment, the balance of design is the centre. Without making it look absurd, I have moved all the detailing and embellishments to the left," he explains.



1. T-shirts combined with luxury shawls - Kiran Uttam Ghosh's, 'Frugality is the new Black'

2. Rahul Mishra's, "Reversing the Recession"

Sources: Kuwait Times, Livemint

# INDIAN FASHION TRENDS IMPLICATIONS

This report highlights the consumer shift, change in perceptions, and awareness of western cultures and brands amongst Indians, which reinforces the strong potential that India has for international fashion brands.

The report also states the three main factors that make India a very challenging landscape.

1. Individuals are today clear as to what they consider essential and what they deem luxury. The choice is very personal, and in line with the kind of lifestyle they aim to lead. Indian consumers are a brand-aware lot, yet they like to base their decisions on rationale and focus on high-end fashion brands that are most coherent with their aspirations – that they see as most relevant.
2. The glocal scene across India shows that the fashion adaptation is as diverse as the culture across the country. Indians like to experiment and fuse western wear with Indian designer clothing, adapt western trends and Indianize them as per local trends, they look at film celebrities and designers for inspiration. This factor makes the Indian market all the more complex to understand and dwell in.
3. Lastly, India is not only open to western designer brands but also home to domestic talent and a long-running royal patronage of luxury.

The factors mentioned above impose a challenge to all international brands.

**OVERCOMING THE CHALLENGE IS NOT JUST ABOUT GENERATING BRAND AWARENESS, BUT ABOUT DEVELOPING AN ENTITY THAT WILL FIND A CONNECT WITH INDIAN FASHION CONSUMERS.**

How can this be achieved?

The clues to the answers are hidden in the target segments that we have identified. The best way to find out is by delving deeper into the thinking patterns of these consumer segments. In the following pages, Insight Instore details the segments and gives some food for thought towards meeting the challenges of the Indian consumer.

# INDIAN FASHION TRENDS CONCLUSION

In defining the 3 target segments, what we have done is to cover the medium to high potential consumers that international brands can target in the Indian context. We have parallelly mapped these segment values with those of some brands that have seen success in the Indian market. We also took a step forward and scanned the international market for brands that could possibly find footing in India. In doing so, we were able to validate our value findings with potential fashion brands.

The trends that we have aligned with the segments, are the strongest that stood out in the Indian fashion multiplicity. And as stated before, they echo the cultural and socio economic aspects of a new India, are influenced by global developments in fashion and of course, reflect a revival of age-old intricate techniques. These trends mainly concern the urban and semi-urban crowd.

Macro trends like Haute meltdown, a direct fallout of the economic gloom, are more transient in nature. However, others like Macro trends 2 and 3 have almost become lifestyles or integral parts of lifestyles. They will see a much longer lifecycle before dying out or morphing into something different. Trend 4 on the other hand, is almost permanent as a concept. However, it will keep seeing numerous interpretations, some short-lived almost bordering on fads, others which stay on a little longer and still others which probably achieve cult status and are around for a very long time.

In all this, our approach has been as non-linear as possible. And our research in other areas like retail and shopper behaviour, help in gaining further insight into the consumers mind. Fashion in India is at the threshold of a new era. Brands and individuals would do well to understand the finer aspects of the scenario, and venture out to capitalize on the opportunities. And with this report, we aim to help them to achieve just that!

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## ABOUT US

Insight Instore is a trend research and retail shopper marketing consultancy. We study trends and shoppers. We see the shop as our laboratory. Our aim is to create impact instore, through insight and innovation.

Our areas of work include shopper research and instore consulting, design consulting, trend research and forecasting.

Our solutions are driven by a combination of various skills and disciplines, coming together on a vibrant and receptive platform. Research forms the basis of our consulting work. Consulting for us does not stop at developing a strategy, but extends to helping our clients to execute and evaluate the strategy. We also use this entire experience for trend research and forecasting.

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