

The evolution of
**Women's
Fashion
Lifestyle**
in India





experience fluid fashion

“Festive season is here and my Liva infused clothes are ideal for every occasion. Having Liva in my wardrobe during this season is perfect, because it’s a nature-based fabric that effortlessly drapes around me. It’s fashion so fluid, that when I move – it moves with me!”

KANGANA RANAUT



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FOREWORD

Dear Friends,

We are all seeing how the domestic fashion industry in India is going through a serious churn as international retailers and changing consumer behaviour continue to impact it. I believe that this may be because despite India's many resources, we somewhere lack a design-led and retail-led culture in our fashion industry.

And unless our apparel and accessories products not just display outstanding and unique design innovation but also lead the design development, all elements of the supply chain will suffer. This will therefore also seriously impact big sectors like textiles, because fashion businesses are their main customers.

On the other side, domestic fashion companies must develop a deeper understanding of the power retail urgently, because the international retailers already have very rich experience of retail and they will continue to make and sell fashion better than us. Some of the world's largest company are retailers and this is simply because retailers have the most accurate understanding of consumer needs and wants. We must all acknowledge that without the power of retail, fashion cannot become a consumption culture. Let us all try and imbibe this 360-degree intelligence of how great fashion is made and sold, and how powerful fashion economies are made.

In totality, this means a large-scale movement to create a strong culture of fashion professionalism—from the factory to the store. We must, from now forth, consciously work towards recreating India as a fashion design and a fashion retail superpower. We must create not just higher capacities and productivity throughout the chain, but also boost consumption of Indian fashion across categories and income groups, and this growth in demand can set off even bigger growth cycles across the economy! We believe India has the potential to be a global fashion powerhouse, but we must invest in making this happen.

This book, *Women's Fashion Lifestyle in India* is an attempt to look at a side of fashion that needs deeper appreciation. And in sync with our flagship magazine *IMAGES Business of Fashion* where we present term reports on various fashion categories, here we attempt to showcase fresh new thoughts and vision on women's fashion in our quest for making India a world-class fashion economy.

We hope you find it helpful in your search for success in your fashion business.

Happy reading



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EDITORIAL

Dear Readers,

Way back in 2009, Michael Silverstein, Senior Partner and Managing Director, Boston Consulting Group, was quoted saying that women feel undeserved and ignored by companies. In his study “Women Want More”, he pointed to the fact that Indian women are most dissatisfied with companies in categories like financial services, cars and apparel.

Truth be told, the Indian women’s social positioning has witnessed unprecedented changes over the millennia. From being passive, submissive, marginalized, always confined and restricted, to emerging as a growing and powerful consumer group in the country, the journey has indeed been eventful. With increasing literacy and employment, rising incomes and the proliferation of mobile devices and internet—the behaviour and landscape of the Indian women as a consumer group has undergone high metamorphosis. But today, it may be also documented that less effort has been apparent in the way the fashion value chain has shown willingness to recalibrate to address this emerging consumer base. This indeed was the reason that abetted the entire idea of the *Women’s Fashion Lifestyle in India* project – to highlight the evolution of women in India as a fashion lifestyle retail market and look at their consumption behaviour, shopping trends, influences triggers and barriers. As a first of its kind in the country, the book also takes an in-depth look at certain key consumption categories and trace their evolution and trends.

The entire book has been segregated into four segments. The introduction chapter unfolds with senior fashion columnist Meher Castelino, tracing the evolution of Indian women’s lifestyle post liberalization, when multiple careers for women opened along with the economy of the country. India’s leading retail consultants Technopak map and size the women’s wear market in India. Luxheus.com features a report that outlines women’s online purchasing behaviour and trends, while Roposo highlights women’s choice making in the digital era. In the *Perspectives* section, we have two of the most illustrious designers of the industry—Tarun Tahiliani and Archana Kochhar. While the fashion and bridal couture légende freewheels his observations, Archana Kochhar accentuates on how Indian design elements could be essential for creating an exclusive and new ethos of Indian fashion.

The book also extensively reaches out and talks to industry leaders across fashion lifestyle categories to consolidate and showcase the broad opinions and beliefs of the market. The women’s *Ethnic Wear* and *Western Wear* sections feature various in-depth observations on trends and changing perspectives along with focus on key emerging categories and their market prospects. And finally, in the last section, *Women’s Lifestyle Beyond Apparel*, we present in-depth expert articles on key lifestyle fashion categories like accessories, jewellery, beauty and eating out, and an expert article that highlights the evolving role of women in the home fashion decision making process.

I hope you enjoy the book as much as we enjoyed making it.

Rajan Varma
Project Head & Managing Editor



EMBRACING THE DIGITAL REVOLUTION: HOW WOMEN USE TECHNOLOGY TO STAY TRENDY

The internet has indeed transformed the entire fashion industry beyond bounds. From ease of shopping on the go, immediate access to trends, and personalised offers to evaluating products based on user reviews and ratings, the digital revolution has empowered today's women to be the boss of her fashion choices.

– By Kaushal Shubhank, Co-founder, Roposo

WHAT TELLS ME WHAT TO BUY

– By Aarti Kapur Singh

From culture, circumstances, budget to celebrity fashion trends, a plethora of factors influence the choices that women make about their fashion. We take a look...

Coco Chanel had once said, “Fashion is not something that exists in dresses only. Fashion is in the sky, in the street, fashion has to do with ideas, the way we live, what is happening.” And she could not have been more true. Today, when all of us are the sum total of our experiences, the factors that influence how we express ourselves are many. Dressing up is perhaps the strongest way of making a statement and expressing our emotions. And the influences on the choices that women make about their clothes are wide and varied.

Here are a few strong influences that affect women’s choices in fashion.

1. COMMERCE & CASH

Women, working or otherwise, do pay attention to business trends. Fashion trends can be affected by the current prices and price forecasts of certain materials. It is obvious that if the global price of silk begins to rise, fashion and clothing companies will want to use less silk in their clothing, and will instead start marketing different fabrics as “in trends”, which effectively changes fashion. It did happen about four years ago in India when the digital print bandwagon moved to handmade, artisan, local craft after machines and dyes imported from abroad became too expensive. So tomorrow, if gold prices were to drop, more companies will use and market gold embellishments, buttons and accessories. These in turn would be lapped up by any fashion-forward woman.



TO SPRING OR FALL: THE CHOICES IN WOMEN'S FASHION RETAIL

– By Jaideep Shetty

The women's fashion business is doubtlessly captivating from all perspectives. From conjuring chic garments to focused brand strategy, fashion often confounds the specialist, the observer and the consumer alike. Everything from the manner of production, marketing and consumption, cause fascination and controversy, and it would be hardly surprising if this continues. But with the explosion in the number of consumers who can afford fashion, we are witnessing a rare democratisation in the fashion industry.



The last five years have seen multiple disruptions in the way fashion is being consumed across India. The main among these have been: the entry of e-commerce players funded with truck-loads of private equity money, the welcoming of the fast fashion giants like Zara and H&M and reportedly Uniqlo, and the most encouraging proliferation of the department store chains, along with their own private labels.

The economy, meanwhile, has shown stability, though a black swan event almost always looms around the corner. De-monetisation already seems one of them, and could impact the economy either way.

A lot of the euphoria is attributed to good fiscal policy, a stable government and a burgeoning middle class. Also, to the increase in disposable income and education levels of the population. No other category has fueled the growth of fashion as much as the women's western wear business. Department stores have increased the footage of this category by 45 percent in the last five years and the yields per foot have had a CAGR growth of 12 percent per annum.



THE CHANGING FACE OF INDIAN ETHNIC WEAR

To counter the rising popularity of women's western wear, which a fair section of sentinels also saw as a looming threat, the ethnic wear industry in India underwent a complete overhaul. A look at the changing face of the industry that is now suggestive of hitherto unknown design innovation.

From tailored aka made to measure salwar suits and blouses to the concept of mix and match and readymade blouses, the dynamics of Indian ethnic wear have undergone a mammoth change. Brands in this category are now seen giving some stiff competition to western wear but is the category growing at par?

THE CHANGING DYNAMICS

The neighborhood tailor or "master", as he was popularly known as, isn't out of business but yes, his business has been affected for sure. The Indo-western look and the mix and match concept has completely taken over now. Today, it is more easy for a woman to just pick up a few kurtis off the shelf and team them up with leggings, patialas, etc. The complete salwar suit look is more restricted for formal wear. This applies to sarees as well. A lot of women are opting for ready-to-wear saree and readymade blouses. In terms of designs too, the saree is witnessing a change. Elaborating on this, Khushboo Parekh, Owner, Vamas, shares, "Ethnic wear has completely taken a new look in today's

CHANGING PERSPECTIVES ABOUT LINGERIE IN INDIA

The Indian women's innerwear is a huge potential market and is yet to be explored and penetrated to reach its zenith. Though, lingerie can be traced back to 3,000 BC, lingerie shopping is still a confidential matter, especially in India, and has a number of social stigmas attached to it. Srikant Velu, President, Sangam India Ltd., delves deep into the industry and outlines the challenges it has been facing.

When I decided to write this article, I thought my best guide would be my daughter, who is from the mass media fraternity and a buyer from this generation and can provide me with more deeper insights. To my surprise, she was very reluctant to talk to me on the subject. Lingerie is still a hush-hush matter, not to be openly discussed even between mother and daughters, forget fathers.

I recall, sometime back, when I went to a newly opened international lingerie brand store at one of the leading malls, the store executive told me that the women seek such privacy while buying intimate wear that most of the times, they even request their male companions to be away from the buying area to allow them to browse and discuss freely with the salesperson, who they generally prefer to be a woman. Such is the lingerie buying scenario in our country. However, my daughter finally did open up but with a complaint, that except for the last two years, where she finally had the freedom of roaming around the malls, choosing her own lingerie from the colourful selection, trying and feeling and discussing with the store staff, she has always had to accept whatever was provided by her mother from a local cosmetic store. Her mother used to decide her size without asking her. She was always given a selection of dull basic colours – black, skin colour or white. No styles, no colours, shape or fashion. This routine was followed every two to three months. She gave a blunt statement, “Now I realize that it's my body, my own, and only I have the right to decide and govern it.”

Yes, days have changed or are rather changing. More advertisements, better communication, vivid displays, retail showrooms, malls, the internet, discussions, blogs and growing independence in women, better buying power, etc., are changing

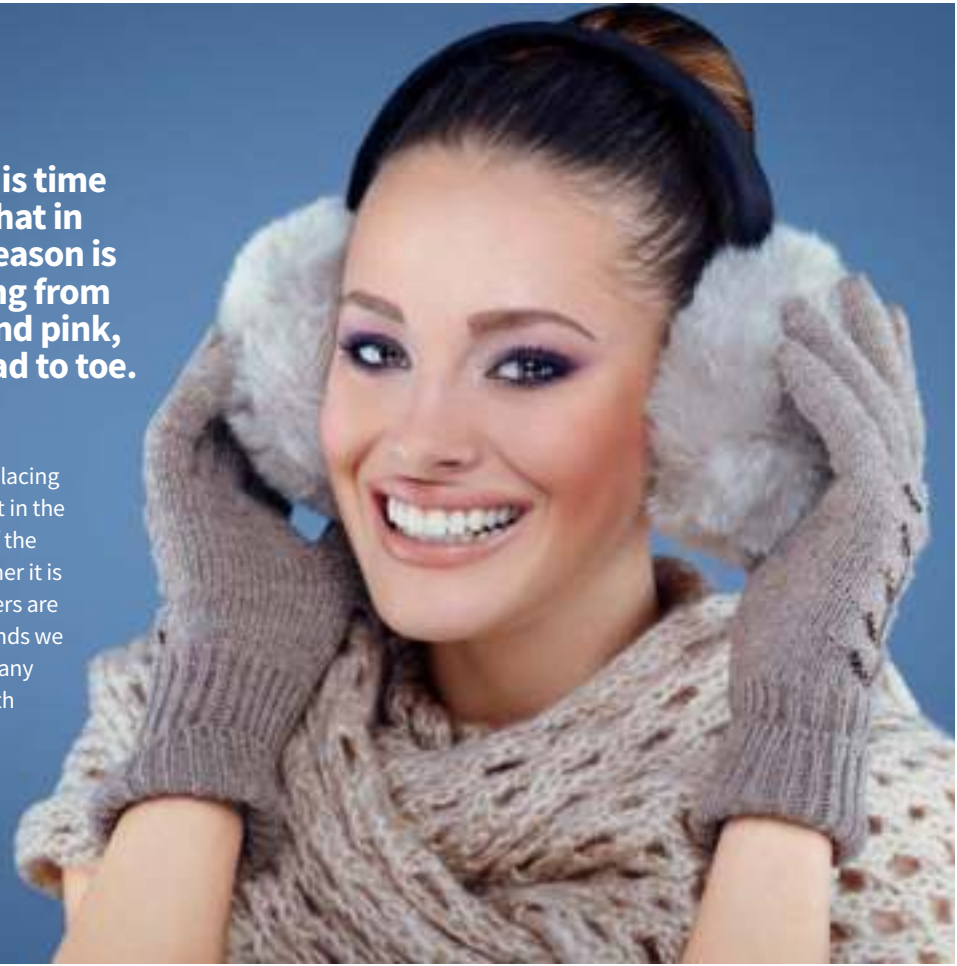


WOMEN'S WINTER TRENDS 2016-17

So the fashion weeks have drawn to a close and it is time to list the trends that will dictate who will wear what in the coming year. As the runaways divulged, this season is all about newer and more unusual ways of dressing from the Borrow from the Man to the spritz of mauve and pink, electro furs, couture red and glitter lurex from head to toe.

Comfort reigns supreme, with anti-fit and fluid silhouettes replacing the form-fitted. Indigenous textiles and techniques get a shot in the arm and tunics emerge as the new mainstays. And in spite of the trend cycles, minimalism stays at the top of the game. Whether it is a revival initiative or a commitment to sustainability, designers are veering towards clothes with timeless appeal. "The fresh trends we are loving the most include high-slit tops, off shoulder kameez, crop tops and many more. Plus we are seeing some trends from the previous seasons, like floor length anarkali," says designer Sabyasachi, giving a hint about what's in vogue.

BASED ON THE FASHION WEEKS AROUND THE WORLD AND OUR INTERACTION WITH MYRIAD FASHION DESIGNERS, WE ROUNDED UP THE FOCUS POINTS OF THIS YEARS TRENDS IN WOMEN'S WEAR, RIGHT OFF THE RUNAWAY.



IT'S ALL ABOUT DARING

Cheek is the watchword for next season. You need a spine of steel to carry off the deluge of mauve and pink, electro furs, couture red and glitter lurex from head to toe that ruled the runways in the fashion capitals. The 1990's minimalism may have dominated summers, but next winter will see colourful and sharp shoulders, corsetted waists, oversized streetwear and the puffy volume that is gaining fashion ground.



CONTEMPORARY TRENDS IN WOMEN'S DENIM

Today, denim is not just a bold fashion statement but a wardrobe staple for many women across India. No wonder, the Indian women's denim market is witnessing tremendous growth in volumes as well as in sales. We analyse the various trends in vogue in women's denim.

From a symbol of non-conformist, young women's rebellion in 1960s, denim has traversed a long way and how! Today, denim is not just a bold fashion statement but a wardrobe essential for women across age groups all over the world. And the scenario in India is no different. With time, denim has evolved in every way—styles, fabrics & fits, products, occasions and more. These days, women have plenty of options in denim wear, including jeans, jackets, coats, shirts, skirts, shorts, capris, tunics and even dresses. Besides apparel, denim has also made inroads into women's other fashion accessories and footwear.

What's interesting to note is how the women consumers in India have developed over the last few years. The self-assured women of today won't just pick any denim or jeans; they are fashion-savvy and brand-aware, and also know a thing or two about washes, styles and fits. The rising demand and awareness has made denim brands and manufacturers to work harder to meet their expectations and win over them.

Rahul Gupta, Vice President, Jealous 21, notes, "While buying denim, women prioritise on its fit, fashion, and innovation." Echoes Sameer Patel, Chairman, Deal Jeans, "For women, the most important criteria for denim is its fit and they take this factor too seriously in making a selection of the denim product."

Concurring with their observations, Zubin Thakker, Director, Recap, however, adds, "For women, wearing denim even today signifies a rush of freedom – freedom from conservative hold of society. So for them, a denim purchase may not be as simple as just buying clothes. However for men, wearing denim is a way of life."





THE FUTURE BECKONS:

GET THE BASICS RIGHT IN WOMEN'S WEAR FASHION

Fashion has ever been influenced by availability of raw materials, the knowledge of creation, geographic limits, socio-economic conditions, religion, socio-cultural and geo-political environments and many others factors. Some factors are deep rooted and perennial, others are evolving, and may become permanent or otherwise.

Ranjini Roy, Head - Branding at Aditya Birla Nuvo, (Chemicals, Insulators and Fertilisers) and Brand Head - Indian Rayon, elaborates.



BAGS

This season, the classic shopper is looking for mid-weight leather for a practical, structured silhouette, paying particular attention to removable shoulder strap that allows for versatility. This special feature comes in contrast colour straps or gussets to add overall interest to the item. Boxy shoulder bag continues to dominate bag selections, incorporating a top handle and short shoulder strap for new cross-body styling, as seen with the bags worn higher on shoulder or tucked under the arm. Micro-proportion remains a key message for the new bag forms, with novelty mini-bags moving into a substantial commercial item, the application of straps and closures like that of draw string pouches becomes decorative focus for this season. Extra-long, chunky and large-gauge chain straps add interest to easy pouch constructions, channeling an urban, industrial feel for a contemporary look. This is a miniature alternative for those looking for the classics, with less weight on the shoulders.



EYEWEAR

Moving on to eyewear, a flat browline and narrow width combined with a futuristic take on the classic shield, with metal trim at the bridge of the nose or bottom edge accentuates the futuristic feel. These modern silhouettes are accessorised with chain straps as key pairing. On another note, feminine cat's eye form has come back to oppose linear forms. We also found decorations deemed as essential on the topline or as wing accents; gem-setting, glitter decoration and bold graphic prints also highlight the item for a maximalist effect.



GLOVES

Dramatic, longer-length opera gloves are another important note as an alternative for cold-weather gloves. Primarily seen in leather, the elongated proportions also work for knitted style in monotone designs with minimal decoration. In addition, extra-long length belts, styled loose and swinging from the hip are reminiscent of skater style and tap into the subcultural references that inspire the Urban Sports theme. Buckles with round hardware add a modern twist, wherein wider waist belts are key to both flat, back-fastening and front-buckle styles; incorporating a contrast or covered frame, materials are constructed in smooth, snake skin, or foil coated leathers, making the buckle fastening belt a must-have wearable.



JEWELLERY

Nothing communicates this trend better than jewellery this season, as we see proportion at play with the silhouettes defined by the oversized earrings. With architectural and sculptural influences dictating a more directional look, the all-metal and new plastic materials translate an evolution of minimalist jewellery looks for how these pieces can be styled. The choker becomes a go-to item for another season, as it taps into the tougher feel of buckles and chains from the pretty-femininity that will prevail in S/S 2017. However, fabric choice like velvet makes this item more wearable and charm-like pendants creating commercial appeal. Ring sets remain to be another important commercial offering, with dangling charms that offer eclectic spirit inspiring the season's maximalist mood. We also find pearls to be confirmed as important materials and details message for A/W 2016-17.



STOLES

An extra-large beret cannot be missed when talking about exaggerated proportions. Tactile and faux-fur materials are being used to accentuate these oversized proportions. The styling is traditional, worn, pulled over to one side at an angle. Another classic is the opulent, antique fur stole in cosy, faux-fur fabric. This long, wide stole with extended collar-like proportions are key to a default playful look when paired with unexpected colour combinations. Alternatively, stripes drive the trend for patterned fur this season or animal prints for that exaggerated look. ●●●



WOMEN'S JEWELLERY IN INDIA

– By Anil Prabhakar

From its auspicious slant to becoming a fashion statement, the significance of jewellery has evolved with time. Veteran luxury retail and lifestyle professional and independent consultant Anil Prabhakar sketches out the history of jewellery in India and shares his outlook of the industry in India.



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