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Consumer Behaviour Trends in Retail Fashion Industry

09 January 2025

Key Insights

1. The "Reverse Traditional Wear Paradox"

- While women are embracing ethnic wear (36% preference) and can wear it professionally, men face workplace restrictions on traditional clothing.
- This represents both a market opportunity and a cultural shift waiting to happen - brands could pioneer "modern professional ethnic wear" for men.
- There's potential for a social movement around gender-equal dress codes in professional settings.

2. The "Sustainability Paradox"

- While Gen Z often discusses the importance of sustainability in fashion, when explicitly addressing purchase triggers and barriers, it ranks low (4% as a trigger and 2% as a barrier)
- This suggests a "values-action gap" - consumers care about sustainability in theory but don't act on it in practice.
- This presents an opportunity for brands to make sustainable choices easier and more automatic rather than relying on conscious consumer effort.

Key Insights

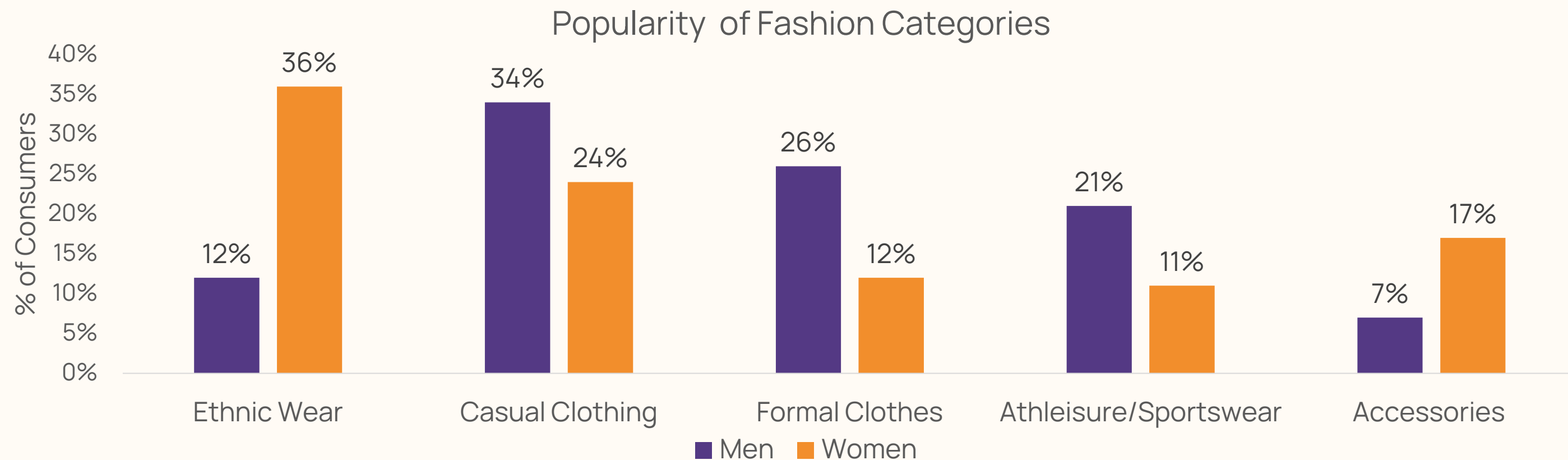
3. The "Touch-and-Feel Premium"

- The overwhelming preference for offline shopping (47%) and hybrid shopping (40%) versus pure online (4%) indicates that the tactile experience still commands a premium.
- This suggests that pure-play online retailers might be leaving money on the table by not creating physical touchpoints.
- There's potential for innovative solutions like "touch-and-feel samples" for online shoppers or AR/VR fitting rooms.

4. The Aspiration-Value Tension

- The largest psychographic segment is "Aspirational Trendsetters" (31%), yet price sensitivity remains high (30% cite it as a barrier).
- This suggests a market ripe for "accessible luxury" positioning - products that feel premium but remain relatively affordable.
- Brands could focus on creating "status symbols" in accessible price ranges.

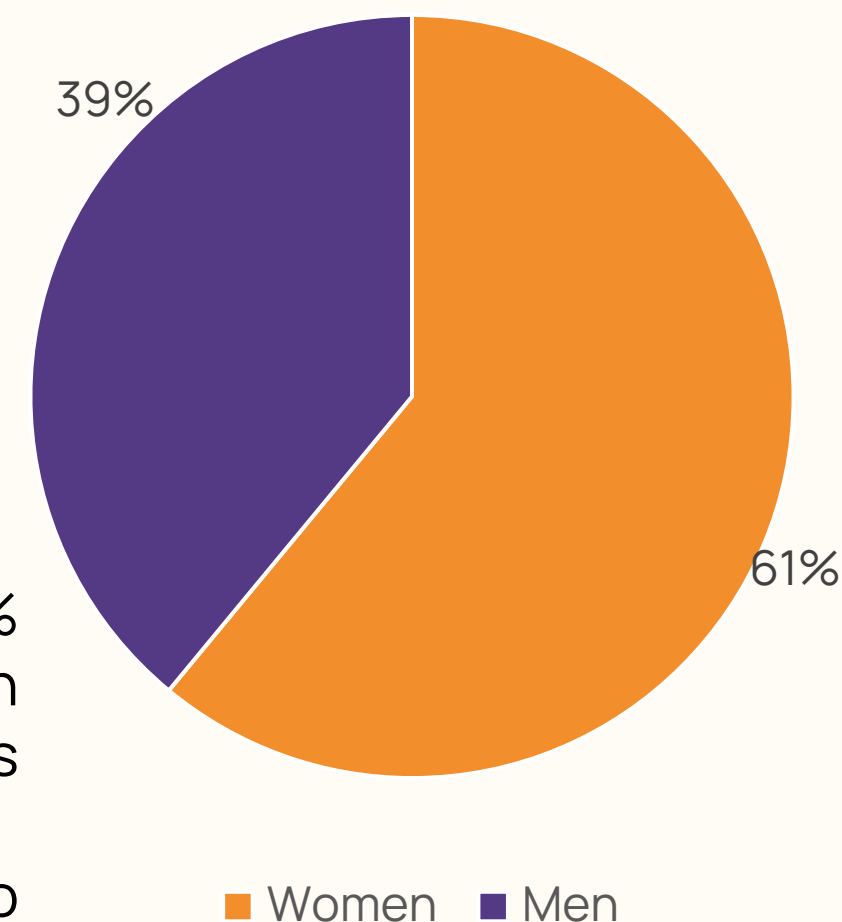
Women More Fashion Forward: Kurti Sales on the Rise, Men Chill with Casuals



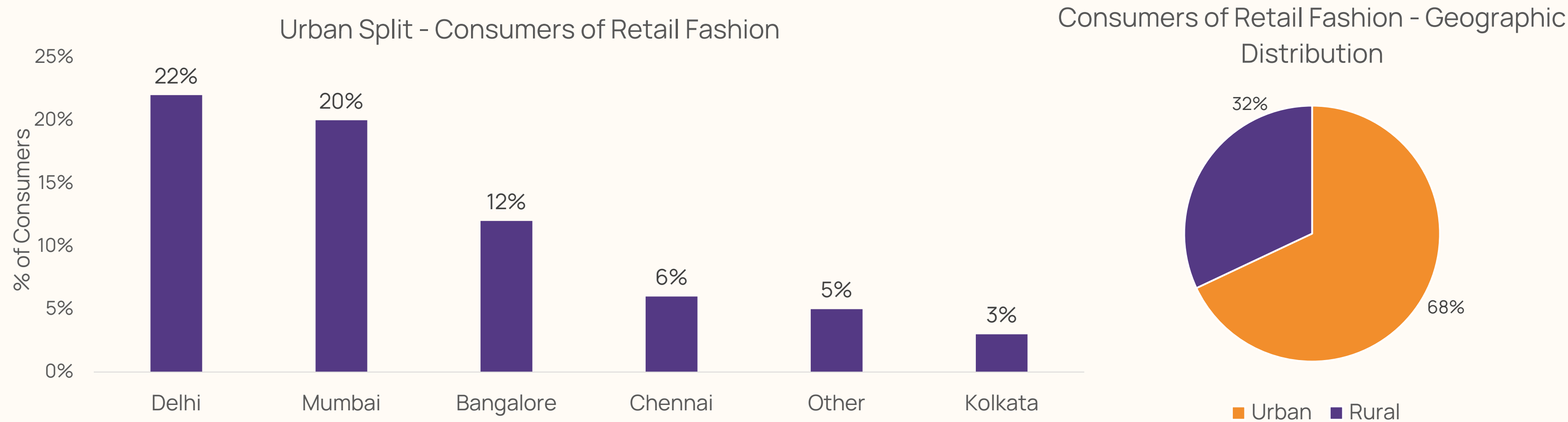
In the Indian retail fashion industry, women make up a significant 61% of consumers, with 36% favoring ethnic wear. Conversely, only 12% of women are interested in formal clothes. Men constitute 37% of the market, with 39% showing a preference for casual clothing, while athleisure is less popular at 21%.

An engaging discussion on Social Media highlighted that many companies in India permit women to wear ethnic attire at work, but not men. This has led to calls for more inclusive fashion policies that allow men to embrace traditional wear in professional settings.

Consumers of Retail Fashion - Gender Distribution



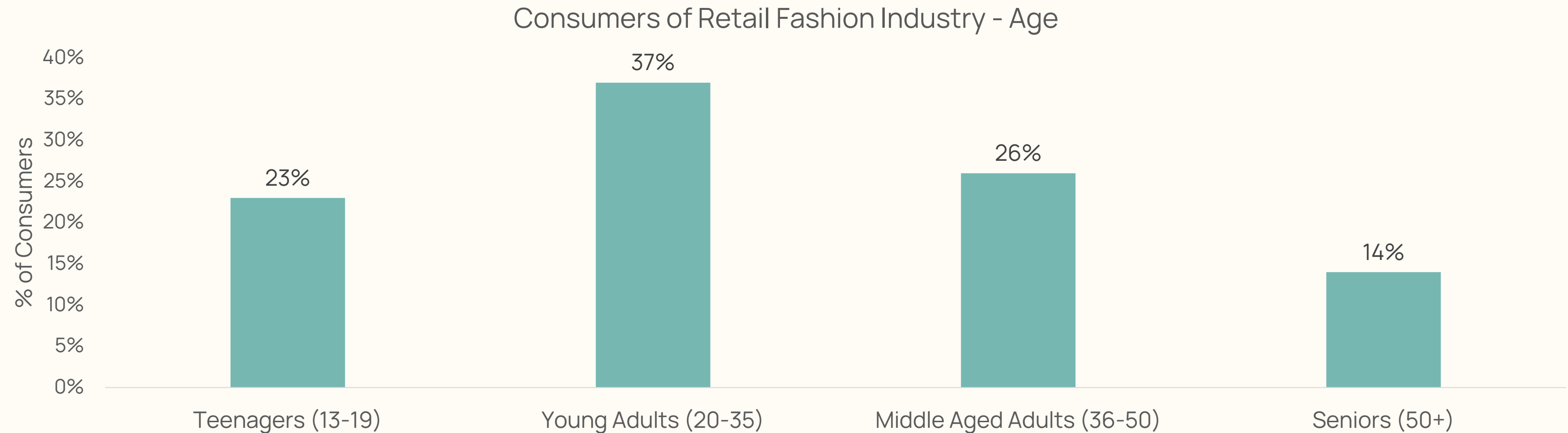
Nation's Capital Also the Fashion Capital



Urban consumers dominate 68% of conversations online, while rural consumers account for 32%. Delhi leads with 22% of conversations, followed by Mumbai at 20%, and Bangalore at 12%.

Popular keywords reflecting regional fashion trends include "Luxury in Delhi" (7%), "Sarojini Nagar" (11%), "Mumbai hub" (7%), "Streetwear in Mumbai" (8%), and "Simplicity in Bangalore" (3%).

Fashion Fervor – Young Adults at the Forefront



Young adults (20-35 years) are the leading consumers of the fashion industry, making up 37% of the conversations online. They favor contemporary styles and are influenced by social media. Teenagers (13-19 years) follow at 23%, often opting for trendy and bold fashion choices. Middle-aged adults (36-50 years), at 26%, prefer practical and versatile clothing, while seniors (50+) make up 14%, opting for classic and comfortable styles.

Millennials More Brand Loyal while GenZ are Peer-Driven

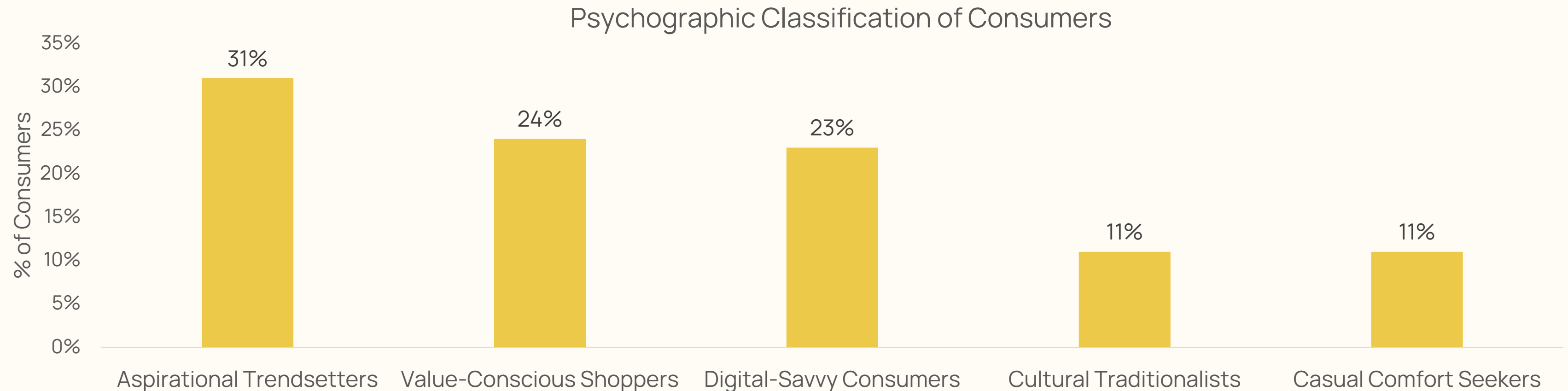
GenZ

- 1) E-commerce Dominance:** Gen Z is driving the growth of online shopping, favoring platforms like Myntra and Amazon for their fashion needs.
- 2) Trend-Consciousness:** Highly influenced by social media and their peers, Gen Z seek trendy, affordable styles.
- 3) Sustainability Focus:** This generation prioritizes eco-friendly materials and ethical production practices when choosing brands.
- 4) Visual Engagement:** They prefer visually rich shopping experiences, often discovering trends through Instagram Reels.

Millennials

- 1) Brand Loyalty:** This demographic values brand loyalty and personalized shopping experiences, often engaging with loyalty programs.
- 2) Diverse Fashion Choices:** Millennials enjoy a mix of styles, blending traditional Indian wear with contemporary fashion for various occasions.
- 3) Sustainability Awareness:** While they are aware of sustainability issues, it is not as high a priority as compared to Gen Z.
- 4) Social Media Influence:** Millennials engage more with established influencers rather than peer-driven content, shaping their fashion choices.

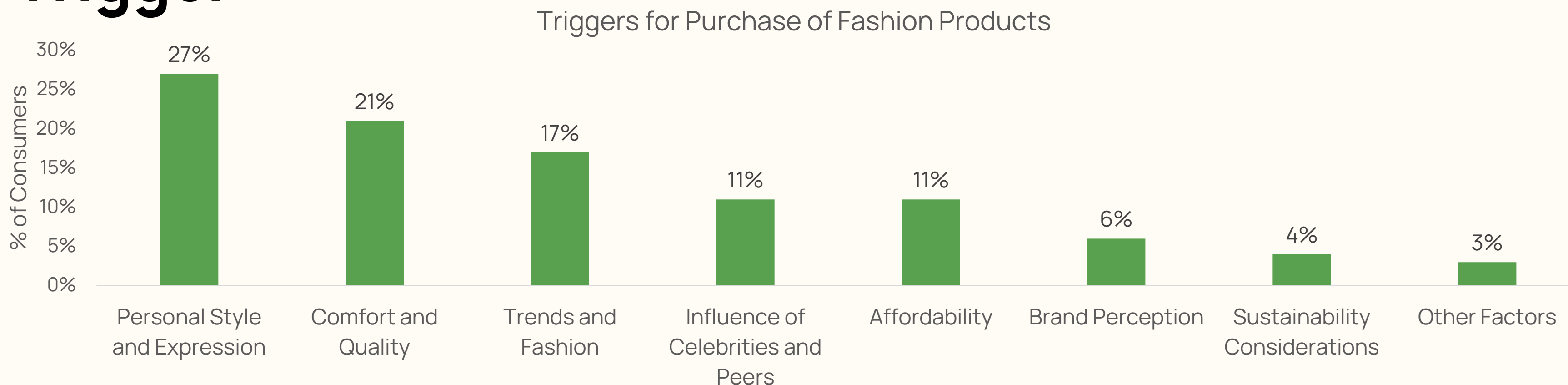
Style Icons: Aspirational Trendsetters at the Helm



Aspirational trendsetters form the largest segment at 31%, driving innovation and setting new trends with their stylish and visionary choices. Value-conscious shoppers come next at 24%, prioritizing affordability and quality. Digital-savvy consumers make up 23%, embracing online shopping and tech-driven fashion solutions.

Cultural traditionalists and casual comfort seekers each account for 11%, with a focus on traditional attire and comfortable, everyday wear, respectively.

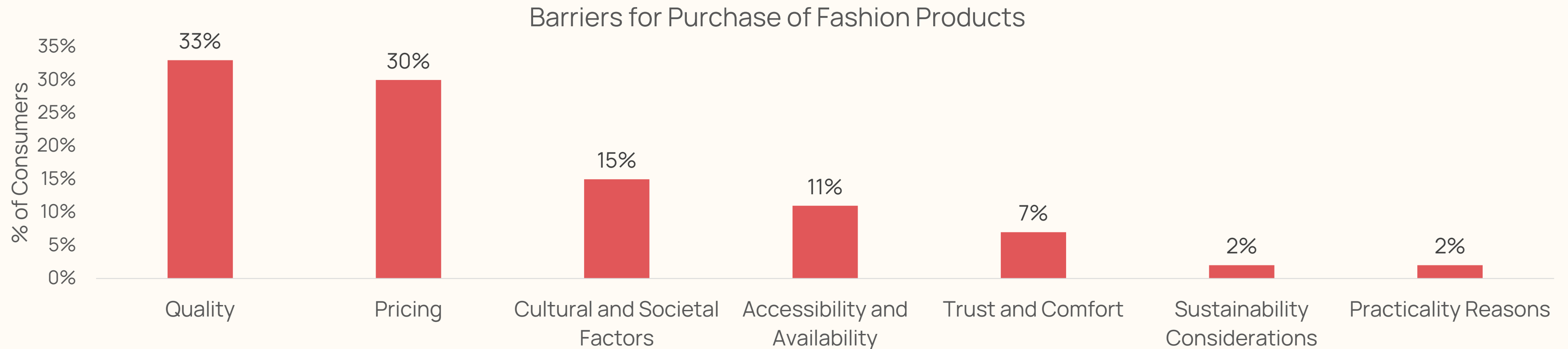
Personal Style Reigns Supreme: The #1 Fashion Trigger



In the retail fashion industry, personal style and expression is the leading motivator for purchases, accounting for 27% of consumer decisions. This highlights the importance of individuality and creativity in fashion choices. Following closely, comfort and quality come in at 21%, emphasizing the need for practical and well-made clothing.

Trends and fashion influence 17% of purchases, driven by the desire to stay current and stylish. Affordability also plays a crucial role, making up 11% of the factors, alongside brand perception (6%) and sustainability considerations (4%).

Price vs Perfection: The Biggest Barriers in Purchase



In the Indian fashion industry, quality stands as the primary barrier for 33% of consumers, closely followed by pricing at 31%. These factors highlight the consumers' demand for high-quality products at fair prices. Cultural and societal factors affect 14% of the market, reflecting the influence of traditional norms and community standards.

Accessibility and availability pose challenges for 11%, indicating the need for better distribution channels. Lastly, trust and comfort (7%), sustainability considerations (2%), and practicality reasons (2%) show that these concerns are less prominent but still noteworthy in consumer decision-making.

Offline Shopping Still the Preferred Channel



Reasons for Preference of Online Shopping	Reasons for Preference of Offline Shopping
Discounts: 37% citing better deals as motivator	Tactile Experience: 81% said they want to “touch and feel” the item
Easy Returns: 29% appreciate the exchange process	Immediate Gratification: Value the ability to take home the purchase
Wider Selection: 26% like the broad variety of options.	Personalized Assistance: Presence of in-store assistants.

Sources: Business Standard; Textile Excellence; Localcircles

From Fast to Last: Consumers Becoming Increasingly Eco-Chic

Cultural Shift in Consumer Behavior

Consumers are increasingly adopting sustainable habits, such as buying timeless pieces, exploring vintage stores, and donating unused clothes.

Brands are adopting eco-friendly materials, such as organic cotton, recycled fabrics, and plant-based dyes, in response to consumer demands for ethical production practices.

Innovations in Sustainable Practices

The use of waterless dyeing technologies and solar-powered production systems is on the rise, helping brands reduce their environmental impact.

Blockchain technology is also being introduced to enhance transparency in supply chains, allowing consumers to verify sustainability claims.

Influence of Gen Z

Gen Z consumers are particularly focused on sustainability, often choosing brands that prioritize ethical practices and eco-friendly materials.

They are inclined to support initiatives like Print On Demand, which minimizes waste by producing items only when ordered.

Rise of Indie Brands and Artisan Collaborations

Independent brands promoting traditional crafts infused with modern aesthetics are gaining popularity.

Government initiatives are supporting artisan collaborations, providing sustainable livelihoods while preserving heritage crafts.



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