



RETAIL TALK

Focus on fit: new technology

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Fit may be the most important selling point in the apparel business, but for many retailers it represents an ongoing challenge. WGSN talks to Edward A Gribbin, president of fit specialist group AlvaInsight, about getting fit right.

In brief

- Accurate and consistent sizing is fundamentally connected to customer loyalty
- Retailers waste money on fit when they do not ensure supply-chain enforcement
- One person within an organisation should "own" fit
- Size is becoming more varied within populations, especially in China
- Plus and petite sizes are underserved in the US and beyond

Common mistakes

The plus-size market is getting more attention than ever from the mainstream fashion industry, whether it's model Crystal Renn hitting the Chanel runway or Saks Fifth Avenue's decision to stock plus-size label Toula this autumn. But the growth of plus size is indicative of a larger, more encompassing trend among retailers to offer more relevant product.

Levi's has just begun rolling out its Curve ID system, a range of denim fits that address the body's shape from hip to seat. Right now the windows in US Gap Body stores are running with the line "Fit is everything" to drive home the message.

It may be that a more competitive retail marketplace, hampered by high unemployment and value-driven consumers, is pressuring US retailers to make core improvements to their product. The average American woman, after all, is a size 14 (UK 18).

And getting fit right is highly profitable. In 2006, Nike aimed to double its apparel sales worldwide and identified fit as a major obstacle. The brand embarked on a three-year fit initiative that dramatically improved product development timelines and execution consistency in 17 countries, according to Edward A Gribbin, who worked with Nike on the project.

Gribbin, who is president of AlvaInsight, also helped Levi's to understand fit on a global scale, using more than 60,000 body scans from women around the world. According to Gribbin, there are four common mistakes retailers make when it comes to fit:

- Using a fit model that does not represent their target market
- Grading product in a linear fashion so that the largest and smallest sizes are modelled on the same shape
- Manufacturing in locations where there is little control over specifications. A Chinese patternmaker, for example, might be working with a different body standard
- Allowing for high tolerance in fit execution so that a customer shopping a single brand might need different sizes when trying on different styles



AlvaScan - one of Alvanon's sizing tools



Models showing off Levi's Curve ID system in New York

"People who do it best not only spend a lot of time and effort thinking about getting the right fit, but they enforce their fit standard to be executed through the supply chain. Gap and Target, for example, have fabulous technical people but they can't always control something once it leaves their hands," said Gribbin.

The enforcement of fit standards through the supply chain requires a number of tools that are the focus of AlvaInsight's parent company Alvanon. One such tool is a customisable mannequin built with the body measurements, posture, stance and overall weight distribution of an average customer in any given target market.

By taking random samples of body shapes from shopping centres worldwide, Alvanon is able to produce models that are true to age, ethnicity and location. Sizing differs dramatically according to these factors. "Russians are among the skinniest teenagers in all of Europe, but after age 35, they have the highest rate of obesity in Europe," said Gribbin.

Changing sizes and populations

- Because dairy was introduced into the diet of Chinese children in the 1990s, that population has grown taller and Gribbin projects that by 2015 the height of the average urban Chinese youth will match that of an American youth
- Body sizes in China are remarkably diverse, especially in major cities, while Japan has the most homogenous body types in the world due to taxation based on hip-to-waist measurements
- Obesity is a challenge to health around the world, but heaviness does have social currency in places like South Africa (where it is associated with virility) and United Arab Emirates (where it is associated with wealth)
- The US has the highest rate of obesity. A 2008 study by the National Center for Disease Control found that Alabama, Mississippi, Oklahoma, South Carolina, Tennessee and West Virginia were the heaviest states in the US, with obesity rates greater than or equal to 30%
- In that same study, Colorado was the only state in the US where less than 20% of the population was obese



Alvanon provided the technology for this Levi's body scanning booth in a Shanghai shopping mall



AlvaScan scanner

All industrialised populations are getting heavier, but shifts in average size are also due to migration. "My feeling is that brands should take a gut check every five years," said Gribbin.

China is undergoing massive changes in population size - retailers exist in large population centres such as Shanghai and Guangzhou but these growing cities are populated by people from all over the country. The average woman from Guangzhou, according to Gribbin, stands 5ft 2in tall, while the average woman from Haerbin measures 5ft 7in.

"We're doing a lot of work in China with everybody from luxury to mass brands. It's a real challenge - Chinese body types are almost as diverse as those in Europe, but statures are generally shorter and the body type distribution is different," said Gribbin.

Another factor to keep in mind is age. The average 50-year-old is half an inch shorter than he or she was at 25. "If I'm a speciality retailer targeting women between 45 and 60-years-old and I try to fit the 60-year-old customer, I'm going to alienate the 45-year-old customer. It's a fine line that brands have to walk," said Gribbin.

The lack of petite-size options in the US is a pet peeve of Gribbin's. "If you look at the population in the US, average heights are described as 5ft 4in to 5ft 8in, and yet 40% of the population is below 5ft 4in. It's a remarkably underserved demographic," he said, also mentioning that Hispanic populations tend to be two to three inches shorter on average than Caucasians.

The plus-size factor

"The average plus-size woman is not really convinced that she's a plus-size woman. She just thinks she's gained a little weight and is going to lose it," said Gribbin.

Sensitive product labelling is crucial for a woman who doesn't believe that she's large, and so is the shopping experience. David's Bridal, which offers plus sizes, created larger-than-average fitting rooms in order to ensure plus-size customers feel at ease. That sense of comfort is especially important for a retailer specialising in big-ticket apparel purchases like bridal gowns.

Rules for achieving the right fit

- Use at least three representative body shapes and sizes - small, a core size and large
- Assign one person within a brand to "own" fit standards
- Request that vendors show samples on specially designed mannequins and take digital photos instead of shipping, so that first cut approval is more efficient and less costly

Brands that consistently fit well, according to Gribbin, include Target, Marks & Spencer, Land's End, Gap and J.Crew. "If you ask J Crew who owns fit, you get one answer because everybody knows. CEO Mickey Drexler said that one person has to own fit. When he first joined J.Crew, 24 different people said they owned it."

WGSN Analysis

- Retailers must work with hard data about their target customer in order to get fit right
- Ensure fit is owned by one individual who has the authority to drive fit strategy across the business
- Consistency in size across styles makes an impression in the customer's mind and encourages loyalty
- Retailers are scrambling now to better serve Chinese markets, which will increase competition
- For the plus-size customer, retailers need to think not just about product sizing but also store experience and labelling

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