



July 2010 management briefing: Growth in the US plus-size market

28 July 2010 | By: just-style.com briefings service

To have plus-size clothing lines to sell, you need plus-size consumers, so it is maybe not a surprise that the American market for these garments is of critical importance.

The National Center for Health Statistics in the US reports that 60% of women and more than two-thirds of adults in the US's 304m population generally are now overweight.

Furthermore, one third of the adult population is obese - a number that continues to grow. And, although the US apparel market contracted during the recession, (falling from US\$34.6bn in 2007 to \$29.6bn in 2009), it is now climbing again.

Market researcher Mintel predicts overall apparel sales in the USA will rise to USD30bn in 2011 and by 3.4% in years after, according to its 2009 'plus size teens and women' report.

However, the plus-sized market remains under-served by the apparel industry, according to Ed Gribbin, president of Alvainsight, a division of size and fit specialist Alvanon which holds the industry's largest body-scan database.

"One of the biggest challenges is that the plus-size woman doesn't want to be a plus-size shopper; she wants what her missy counterparts have...she doesn't want a separate department with less selection and higher prices."

And in most situations retailers have been very slow to grasp the needs of the plus-size market.

"The people are there, and plus-size apparel was one of the bright spots through the recession." Gribbin adds. "But we're not really tapping into the potential because we have too many merchandising roadblocks that really prohibit the retailer and brand from making a really solid connection with that plus-size woman."

Different requirements

Madison Riley, north America managing director for management consultants Kurt Salmon Associates, says if you break down the market by income, location and other factors, they form very narrow segments with very different requirements - so the market is not as easily served as might be imagined.

This part explains why online stores - such as Redcats' onestopplus.com - are increasing in turnover: they allow a broader customer base since distribution is often a major problem particularly for smaller stores and brands, explains Jessica Svoboda, plus-size designer who runs Svoboda Style.

The market is also dominated by a few large retailers, such as like Charming Shoppes' Lane Bryant; Redcats online brands Avenue and Woman Within; and Torrid - operated by Hot Topic, which is focused on the teen market.

A growing trend in the area of women's plus-size clothes is to have online communities, where women can discuss fashion and get special deals, for instance [Inside Curve](#), developed by plus-size market giant Lane Bryant.

There is also a strong focus on using Twitter and Facebook as marketing tools - as well as plus-size fashion bloggers often dubbed 'fatshionistas'.

Despite the growth in online retail, Yuliya Raquel of Igigi, a plus-size fashion retailer, argues brick and mortar stores will still be valued, since fit is of most concern to the plus-size

consumer.

The Mintel survey says "plus-size women must often make do with 'one-plus-size-fits-all' apparel that is unflattering and/or ill-fitting....nearly half of women responding say that they often buy clothes that are too big in order to fit specific parts of their bodies. Moreover, some 43% say stores are often out of their size."

Alvainsight's Gribbin points out that ten years ago almost every brand and retailer used an hour-glass shape as its plus-size standard - essentially just a blown-up version of a missy standard.

There are hour-glass women who are plus-sizes, but they account for less than 4-5% of the population. Instead, the core plus-size shape is really more of a rectangular shape - or "modified hour-glass," as the industry prefers to call it.

"The mannequins we sell and the advice we give is all based on that shape and most of our clients are very happy with the fact that they're selling more in the plus-size area," Gribbin explains. The added bonus, especially for direct business operating mail order or online sites, is fewer returns "because the shape is more appropriate to that customer."

Population growth

Mintel says sales are being propelled by the increasing number of females in the US.

In terms of raw demographics, American female population numbers are projected to increase 9.7% between 2004 and 2014. And while marketing focuses are now on fashion conscious youth and younger women, population growth is actually highest in older demographics.

Mintel estimates that 12m women aged 18-34 buy plus-size clothes, compared to 20m aged 35-54 and 21m aged 55 and older.

The market may be fragmented, as Riley says, but it is still growing as Americans increase in both height and weight. He told just-style the key to entering this market is being fully committed to the market and building a loyal customer base.

"It is about understanding the customer and sharing your philosophy with them," Raquel explained.

Focusing only on plus-size clothes is more likely to yield results since the clothing will not be expanded versions of something designed on a size 8, but done with an understanding of the fit and needs of the plus-size markets.

Riley stresses this is a business that builds up gradually as repeat customers are attracted, but it is solid - plus-size consumers are often loyal: "If they brand, they will support it."

Svoboda says there needs to be a change in mindset in the US however.

Department stores such as Macy's and Bloomingdale's have plus-size sections - but only a limited space of about 1,000 sq feet, often featuring lines that went out of fashion years ago. Plus-size women should not be marginalised like this, says Svoboda. They want fashion - they want to look good.

She says the reason that the market is largely ignored by the fashion industry is because plus-size shoppers have never had fashionable options available. This forms a cycle - they can't be fashionable because there are no clothing options - and so it is assumed there is no demand for fashionable plus-size clothing.

The plus-size industry is still looked at as "second class," adds Raquel.

Filling the void

Indeed, there is still a long way to go before the plus-size consumer has the variety of clothes they demand, says Svoboda.

Both she and Raquel add that designers need to start looking at the plus-size body as something to design for.

The void is slowly being filled said the editor of women's fashion and lifestyle magazine Glamour Suze Yalof Schwartz, with designers like Micheal Kors starting plus-size lines, and stores like Torrid, Faith 21 and Missphit all designed to attract younger and trendier

demographics. Walmart and Target are also expanding their lines allowing for a variety of cost options.

There has been a recent surge in the number of plus-size models and this has included celebrities gaining media attention in trendy clothes that Schwartz says: "Celebrate the full figure woman."

"It takes a specific skill set - you can't just transfer your skill set from straight size," says Raquel. "You can't just take something from a size 8 and make it size 23".

She says the industry is growing - but the best way to enter the market successfully is to cater only to plus-sizes - size 12 to 32.

Ten years ago when she started Igigi, she says, events like Full Figure Fashion Week and fun, glamorous clothing for plus-size shoppers were just a dream. The US industry has come a long way - and is heading in the right direction.

By Alyshah Hasham.

© 2010 All content copyright just-style.com. Published by Aroq Ltd. Seneca House, Buntsford Park Road, Bromsgrove, Worcs, B60 3DX, UK. VAT No: GB785642391. Registered in England No: 4307068. Tel: Intl +44 (0)1527 573 600. Toll Free from US: 1-866-545-5878. Fax: +44 (0)1527 577423. Email: info@aroq.com.