



Speaking with style: Janice Wang, CEO, Alvanon

28 August 2008 | Source: just-style.com

With western high street stalwarts like Marks & Spencer, Topshop, Zara, H&M and C&A all setting their sights on China's 700m middle-class consumers, the pressure is on to make sure their investments generate as many sales as possible. Adapting their clothes sizes to Chinese body shapes is one sure way says Janice Wang, CEO of size and fit expert Alvanon.

Last month, at a time when retail sales in most developed markets were at a standstill or contracting, shoppers in China, the world's largest consumer market, took to the stores like never before.

According to the country's National Bureau of Statistics, total retail sales in July soared by 23.3% to CNY862.9bn (US\$125.7bn), the fastest growth in at least nine years, helped by a 26.8% year-on-year surge in sales of garments.

And this is just the tip of the iceberg. In its report on '[Clothing and Footwear in China](#),' Euromonitor International forecasts the Chinese clothing and shoe market will nearly double from \$90.8bn to \$176.1bn between 2006 and 2011.

So it is perhaps with some understatement that Janice Wang, CEO of Alvanon, the global size and fit expert with customers ranging from Gap to M&S, tells just-style: "There is an unprecedented retail opportunity in China."

She counters this, however, with the warning that retailers and brands crafting a strategy for entering the Chinese market first need some background information on what their potential customers are like before they start to try to sell them apparel.

"A lot of brands don't really understand what it takes to retail in China. You can't just take out bits of your existing ranges and send them over to China and hope they will sell."

She also notes that perhaps the biggest mistake is to view the market as 'one China,' when in fact there are big differences in the shape of the population from north to south and east to west.

First and foremost, she points out: "The right product mix must be combined with the right size and fit to achieve a successful brand following in China."

Body measurement study

Alvanon's solution has been to carry out China's largest ever body measurement study, scanning over 28,000 people in four key regions of the country over the past two years to map out the core body shape of Chinese consumers.

"This is not a national study, this is a consumer-based study," Wang explains. "What this means is that the only people we're targeting are the people who are consumers."

"We don't go into rural areas, we don't go to places where people don't shop. Because in China there's such a big disparity between rural and urban areas, and you really only want to know about the urban consumers because they're the ones with disposable income."

So far, 10,700 males and 17,500 females have been scanned using 3D full body scanners that take up to 45 measurements of fully-clothed shoppers in a matter of seconds.

And Wang is keen to stress that the survey is ongoing at a number of urban retail shopping centres across the country.

Powerful insights

The results, which have just been made public, provide leading apparel brands with some powerful insights about their target consumers.

For instance, selling clothes in China requires just half the number of sizes to reach the same percentage of the population as in the US, since the core body shape in China is significantly smaller and more homogenous than in the US and Europe.

But there is also a difference in stature in both genders between Chinese of northern origin and southern origin.

Women in China have much narrower variances in bust, waist and hip measurements than those in the US – which means a smaller number of clothing sizes are required to cater for them.

And in common with other Western countries, the younger generation in eastern China is growing taller and heavier.

By studying its own data and other size surveys, Alvanon has found that over the span of a decade (1992-2002) the average height of children aged 2-18 years old increased by almost 1.5" – nearly twice the increase seen among US children.

It also calculates that over 30% of urban Chinese are considered overweight, with the highest increase in body mass index seen in Chinese women aged 35-45.

Specifically, the data shows that the average Chinese female is 5'4" high, weighs 125 pounds, has a chest measurement of 31", a waist of 28", and a low hip of 35".

This compares to an average US female of the same height who weighs 155 pounds and has a chest of 37", waist of 34" and a low hip measurement of 42".

For men, the average Chinese male has a height of 5'8", weighs 145 pounds, and has a chest of 35", a waist of 31" and a low hip of 36".

Whereas the average US male is 5'9" high, weighs 191 pounds, and has a chest measurement of 41", a waist of 37" and a low hip of 41".

Eliminating guesswork

What this data will do, "is take out all the guesswork from the size and the fit angle", Wang explains, "so that an apparel brand can work on the things it knows best, which is the fashion and the styling, and the way that it wants to uphold the brand identity.

"They won't have to think 'will this size work', and 'what's the size range going to look like'."

Rather than simply disclosing data for data's sake, Wang says Alvanon would prefer to work with brands through its AlvaInsight consulting division to help them understand the complexities of size and fit based on their target market.

It can also create customised fit mannequins – a physical sample size reference form – and identify the size range and the grade that's required.

Her advice for retailers thinking of selling their clothes in China? "The biggest thing is do not look at China as one market. You have to look at it as a minimum of two markets with different sizes and proportions – north and south – and provide stock for that north/south stature divide.

She also has a cautionary note for anyone who thinks that selling clothes in China is going to be easy, even armed with this knowledge.

"One of our clients is a China retailer who picks for each store separately because the size matrix is different for each store. It must be a nightmare for the distribution centre, but it does mean they can sell more."

By Leonie Barrie.