



An Ill-Fitted Affair: Are Retailers Missing Out?

By Arthur Zaczekiewicz and Debra Borchardt from Women's Wear Daily
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Either the math is wrong or retailers are missing out on a huge opportunity.

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According to The NPD Group, the women's plus-size market generates about \$17.5 billion in annual sales, while IbisWorld estimates the market's annual growth rate at 2.3 percent. The Centers for Disease Control and Prevention classifies about 100 million women — or 60 percent of all American women — as being overweight, with the average U.S. woman being a size 14. The CDC has an average weight for men at 195 pounds, and with a 40-

inch waist. Seventy-four percent, or 112 million, of men are considered overweight. The women's apparel market alone in the U.S. is a \$110 billion business. So why are plus-size sales just 16 percent of the total? Can this discrepancy help explain why apparel sales have been lackluster for the past decade while the stretchy sports apparel market has gained steam? Perhaps.

Sizing is a complex issue and there is also a negative stigma attached to labeling apparel "plus" or "big." But it is unclear exactly why so many brands and retailers are not serving this market. Possible reasons include the nature of fashion apparel itself. Fashion and the

popular culture — and media — that supports it tends to be, well, thin.

The examples of lack of size assortment are numerous. Lululemon is well-known for not carrying sizes beyond a 12 and the founder's son and wife went on to establish a new brand Kit and Ace that doesn't create clothes beyond a size 10. J. Crew stops at a size 12 in the stores and so does Urban Outfitters. Men don't get any better treatment. There are no shirts beyond a size large for men at Urban Outfitters and good luck finding a length past 34 at any store. That exists only online.

According to the Department of Commerce, the



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standard for a misses' size 12 features a 35-inch bust, a 26-inch waist and a 37-inch hip. But a J. Crew size 12 is measured as a 39-inch bust with a 31.5-inch waist and a 41.5-inch hip, while a Chico's size 12 is a little more generous with a 39-inch bust, a 33.5-inch waist and a 42-inch hip.

It could simply be a matter of business — meaning fashion apparel can only thrive when it targets the people with the most money. That sounds simplistic, but the CDC and the National Institutes of Health report clear links between poverty and being overweight, since lower-income households can't afford to spend on healthier foods such as fresh

vegetables. And as the Pew Research Center recently reported, lower-income households are earning less (adjusted for inflation) today than they did in 1970. Meanwhile, the middle class continues to earn less, and shrink in size.

Women in the largest size demographic, 12 to 14, find it difficult to buy clothes in their size in stores. They disappear into the black hole between size 10 and plus-size — too large for the “regular” clothes brick-and-mortar retailers carry and too thin for plus-size — unless they are shopping at a discount department store.

Still, why wouldn't a retailer or brand want to better serve this segment with more

fashionable clothing given the potential dollars available?

Jim Shea, chief commercial officer at predictive analytics firm First Insight Inc., agrees that the plus-size market is “underserved given the demographic trends.”

“Stretchy athletic apparel may be filling some of the gap but not all of it,” Shea said.

“Retailers and brands use the First Insight solution to identify the right products for each of their target segments or ‘personas,’ so we have a six- to 12-month advance view of how brands are approaching the market. Based on our data, we don't expect to see a lot of brands specifically targeting the plus-size segment



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over the coming months.”

A few companies are increasing efforts to offer clothing in sizes that mirror the sizes of the majority of the population. Target Corp. chairman and chief executive officer Brian Cornell said in October that the company doubled-up efforts in this market with the launch of its first [plus-size brand called Ava & Viv](#) earlier in the year. It was in response to negative consumer feedback about the retailer's offerings in sizes larger than 12.

In November, [Hot Topic rolled out a “Star Wars” collection](#) that included plus sizes. Designer Rachel Roy has revealed plans to

launch a plus-size line in February.

Jan Rogers Kniffen, ceo of equity research firm J. Rogers Kniffen Worldwide Enterprises LLC, said a few retailers that are addressing the needs of larger-sized women include J.C. Penney Co. Inc. and Kohl's Corp., who have been “expanding their offerings and ranges, recognizing just how many 14, 16 and larger sizes are in their customer base.”

Elizabeth Simon, senior vice president and president of apparel at Sears, said the “cornerstone” of its apparel merchandising reboot is with plus-sizes as well as offering a broader range of sizes. “Sears is launching a new brand,

and it is trying to show how can you service a whole breadth of a woman's wardrobe — career, daywear, denim casual, pieces and activewear,” Simon said, adding that it includes a “whole range of activewear to fit better and be functional.”

The line is aimed for a spring launch and has a “working brand” title called Simply Emma.

“What we started with was talking to some of the buying associates, the New York design office and people who were saying they couldn't find clothes [that] fit,” Simon said, adding that feedback from focus groups revealed an “obvious opportunity.” Simon said the Simply Emma line aims to be



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nonsegmented or age-specific, but “well-cut” and “color-coordinated.”

At Sears, plus-sizes range from 16 to 24 with misses' sizes running between 8 and 18 with some private-label items starting at size 4, Simon said. “Our highest sellers are size 12 to 14,” she said. “Certain regions skew higher. Mississippi is bigger, able to reflect this with Shop Your Way. The Northeast is smaller, and [so are] some areas of California.”

Simon said scaling out apparel looks in broader size ranges requires new patterns as well as the “latest data on women's body shapes.” The goal is to offer choice, she said. And not just in

women's wear. Simon said the retailer carries Levi's and Dockers for men with inseams that run to 36 inches, for example.

Jenna Giannelli, an analyst with Citigroup, said with increasingly more overweight Americans along with sizing discrepancies between retailers and brands, it is no wonder that stretchy pants and apparel are popular. “It's easier to get into those sizes than squeezing into a size 8,” she said.

Meanwhile, Kniffen said the bell-curve pre-packs are slowly fading away. “Now the buyer, in most cases, can buy the color selection and size ranges by item,” Kniffen said. “So the store is not stuck with

reordering items that are still in stock.”

That still doesn't mean retailers will order sizes that mirror the population.