



REINVENTING PLUS SIZE

DRESSING THE 'AVERAGE' WOMAN IN AMERICA

Alvanon's CURVYcon Survey 2019

alvanon

theCURVYcon

Authors



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Cover Image: Matt Sayles/AP, theCURVYcon Powered By Dia&Co.

FIVE KEY TAKEAWAYS

1. 36% of women scanned thought they were hourglass, 0% were.
2. 81% of self-identified body shapes did not match with body scans.
3. The plus size consumer has an individual personality and wants to feel catered to. Her tastes are as diverse as regular sized consumers.
4. Design educators need to lead by example and learn to design for plus size so they can teach the next generation.
5. The majority of women are plus sized; building successful strategies that service them is a significant business opportunity.



Image: Matt Sayles / AP; theCURVYcon Powered By Dia&Co.

The average woman in America is having a hard time getting dressed. Although 67% of women in the US are plus sized, they account for only 17% of womenswear spending. And of the 62,000 speciality stores in the US, only 2,000 of them focus on plus size women.

Women who wear plus size clothing spend 20% of what regular-sized women spend. This means there is a huge opportunity for businesses who are able to bridge that 80% spending gap.

The plus size market is in flux. On one side, increasing body positivity is putting bigger bodies in the fore. But, at the same time, brands are struggling to play catch-up as this consumer becomes increasingly vocal and demanding in how she wants to dress.

In the past, retailers have cited increased expense, difficulties designing and lower sell-through rates as excuses for not serving this customer better. However, treating the majority of consumers as an afterthought in an increasingly challenging retail market is a very risky move.

As retailers and brands start to make more considered steps into the space, the scope of the challenge is becoming clear - from difficulties in understanding shape and fit preference to technical issues around pattern grading.

"The more dimension and shape there is in the three-dimensional body you're fitting on, the more pattern engineering is required to achieve a good fitting garment," says Alvanon senior consultant and plus size specialist Alice Rodrigues.

"The balance and shape of plus garments is different than regular sizes. You can't grade your way into plus; it must be developed independently of regular sizes. Often, the style lines or proportions may need to be changed slightly in translating a regular size garment to plus."

She emphasises: "Brands entering into, or wanting to up their game in the plus market, should ideally have a dedicated product development and technical team for plus. The skills required to successfully execute plus apparel are different than straight sizes. If their vendor base is unfamiliar with plus product, they need to anticipate and plan for a learning curve at the outset, including vendor on-boarding, blocks and grading."



Image: Matt Sayles / AP; theCURVYcon Powered By Dia&Co.

THE CHALLENGE OF FIT

For retailers opting to move into the space, one of the biggest challenges is how do we create products that fit as many of our customers in the best way possible.

For this group of consumers, going to a store can be an incredibly frustrating experience, with 72% of the millennial women surveyed at [theCURVYcon 2019](#) saying they are unhappy with the products offered by retailers in their size.

Frustrations among this cohort take on many forms, but the most preva-

lent challenge is fit, with 61% of those surveyed saying that this is where they need to improve, while 34% said that the volume of items on offer needed to improve.

[Alvanon](#) CEO Janice Wang says: "Companies don't fit on every single size, because we have to industrialise the way that clothing is made. But if retailers don't have the data sets to make those mathematical algorithms, it's very difficult for them."

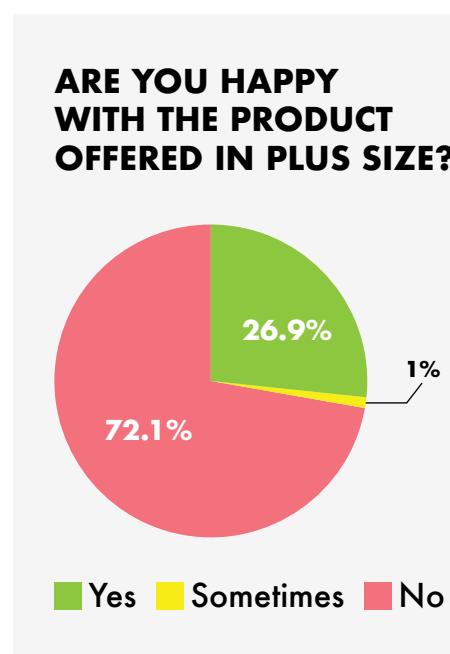


Image: Matt Sayles / AP, theCURVYcon Powered By Dia&Co.

“72% of the millennial women surveyed at US event theCURVYcon 2019 saying they are unhappy with the products offered by retailers in their size.”

Similarly, Liz Muñoz, the CEO of plus size brand [Torrid](#) said that when the business decided to shift to vertical operations; the most important thing was that it fitted young, sexy and cool. "The CEO before me said if that's what you believe, go into the fit room and don't come out until you have nailed fit. I did not come out for three and a half years. I must have fit 40,000 garments. I learned what worked. Every rule as a pattern maker had to be broken."

As bodies get larger, assumptions about them become increasingly challenging as where fat sits varies by ethnicity and age.

Muñoz said: "We use Alvanon, who

have been incredibly helpful in helping us understand that bigger girls are not always hourglass. I remember sitting with Alvanon and hearing that they had measured a lot of Latinas, and they discovered in their measurements that we are not hourglass, which means we put on weight in a lot of different places and this has been a huge influence for us."

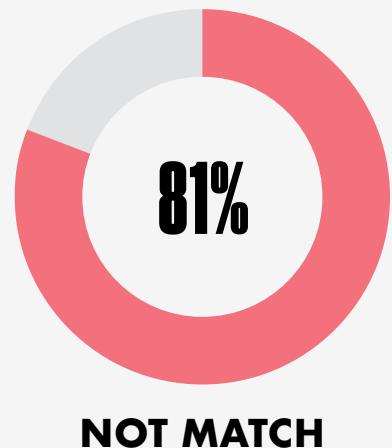
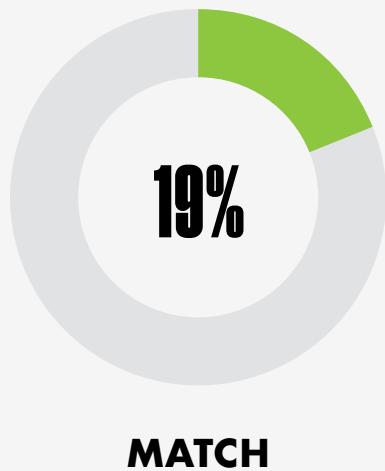
Similarly, [Good American](#) co-founder Emma Grede said that when she designed her first collection for the brand, she designed with an hourglass shape in mind and only used two fit models, but she has now evolved her strategy to have 10 fit models - to ensure that fit represents the different ways that fat falls on the body.

UNDERSTANDING BODY SHAPES

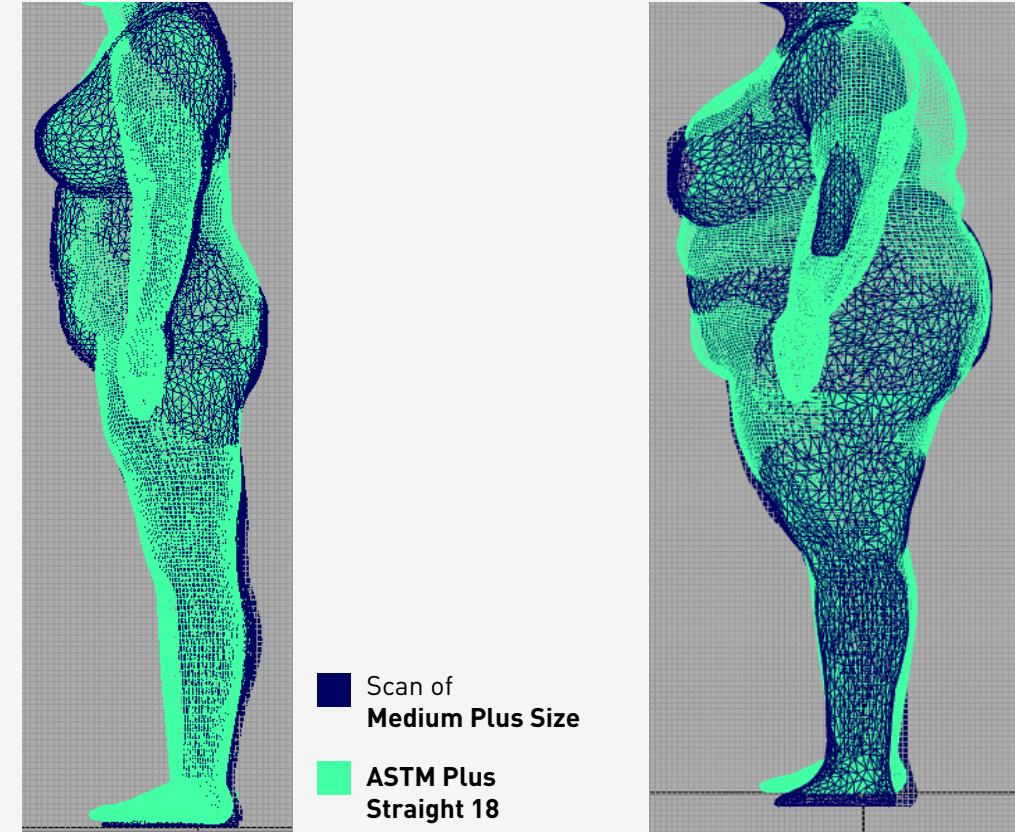


| | | | | | | |
|--------------------|------------|------------|------------|-----------|------------|------------|
| Body Scan Results: | 53% | 24% | 22% | 2% | 0% | |
| VS | | | | | | |
| Survey Results: | 15% | 7% | 16% | 6% | 36% | 20% |

DO SELF-IDENTIFIED SHAPES MATCH WITH REAL BODY SHAPES?



ALVANON OVERLAY IMAGES OF SCANS OVER ASTM MODELS



For businesses operating in this space, there is a clear opportunity to improve fit in a number of key areas. In the Alvanon survey 56% and 51% of millennial women say that they find it difficult to buy bottoms and jeans, respectively.

Brands also need to help plus size women to understand their own body shape. Some 81% of the women's bodies scanned did not match up with their self-professed body shape.

For retailers who use body shape as a means of helping women understand what will fit and suit them, this should come as a serious wake-up call. There is a tremendous amount of work that can be done in order to help women make better clothing choices.

While brands need to work on creating strategies that lead to better fitting products, they also need to work on communications strategies that help their customers to under-

stand what their body shape actually looks like.

For designers creating for plus size women, designers should look beyond products that seek to emphasise a largely non-existent hourglass shape. Rather, they should recognise and celebrating the diversity of shapes that plus size women's bodies come in.

CREATE WITH INDIVIDUALITY IN MIND

For businesses serving this customer, it's important to ensure that strategies emphasise the same diversity of interest and taste as the rest of the market.

When brands aren't able to fit a garment properly, it has the capacity to harm the confidence and well-being of the women that they're serving.

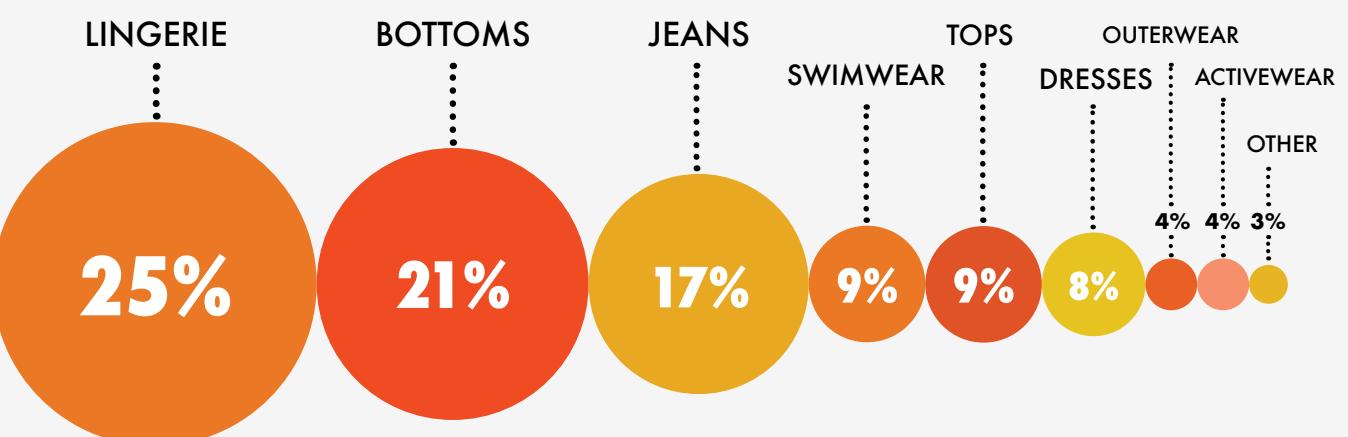
Muñoz said that if people are fussing with their garments all day, that is a constant reminder that there is something wrong with them, and "what we don't say as big girls is: whoever made this is an idiot, they don't know what they're doing." Instead, they blame themselves. "It was so incredibly important for us to figure that out, making that focus on fit, that meant women got to wear clothes that were young and sexy like they should be."

“I just want the same styles as regular sizes.”

When asked what retailers could do to improve, one survey respondent simply said: "I just want the same styles as regular sizes."

Retailers have an opportunity to step up for the average woman, who happens to be a size 14 and above, by normalising her experience and making her feel beautiful through the products they make.

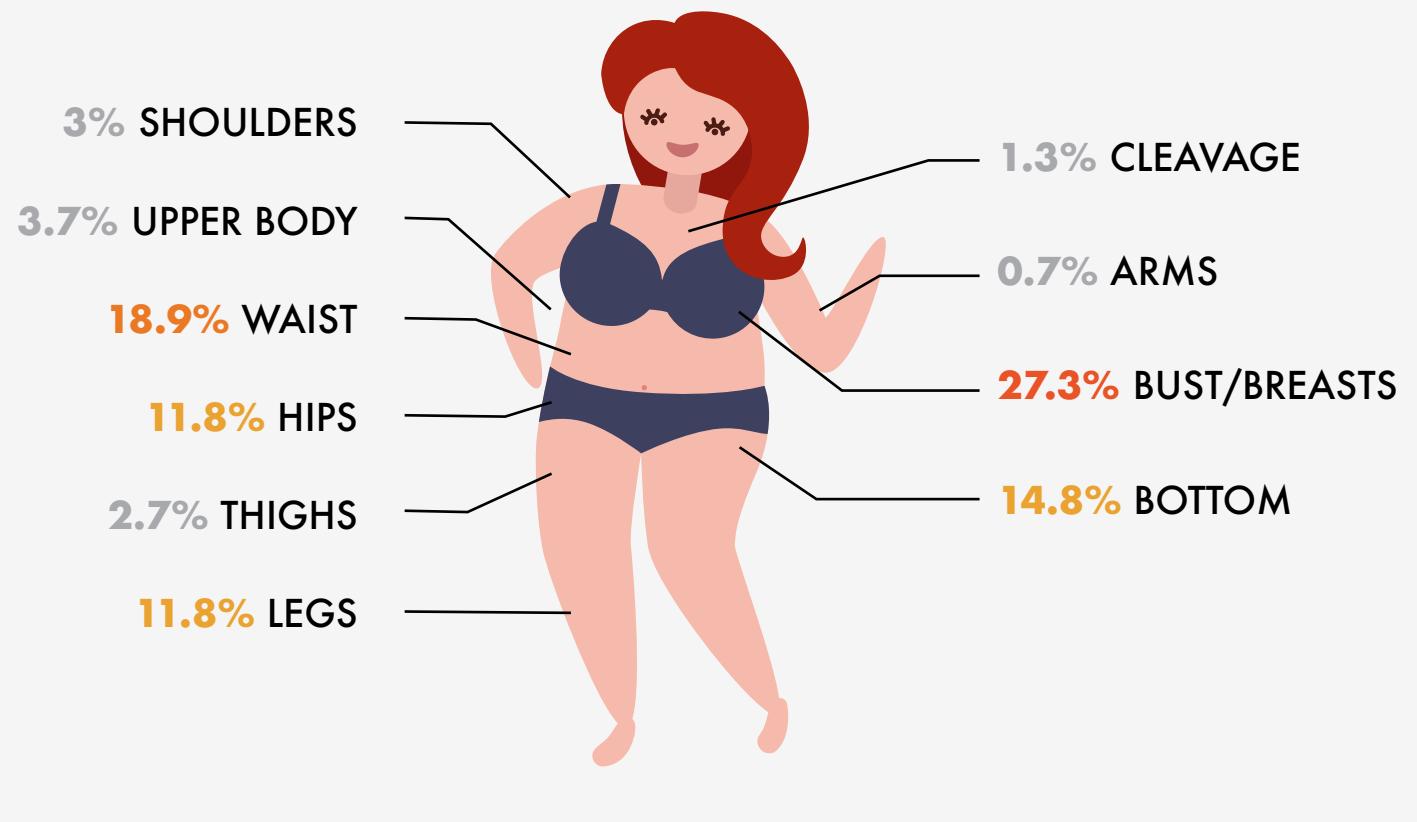
COUNTS OF WHAT PEOPLE FIND DIFFICULT TO BUY



HOW WOULD YOU DESCRIBE YOUR STYLE?



WHAT PARTS OF YOUR BODY DO YOU LIKE TO ACCENTUATE IN YOUR OUTFITS?



When asked to define their style in their own words, the CURVYcon 2019 attendees responded with unique definitions, ranging from “minimalist hood goth”, to boho, conservative, cute, casual and trendy; which emphasises how this consumer is crying out for options that speak to her individual preferences.

There's also a diversity of perspectives around which body parts women wish to celebrate. When asked what parts of their body they wanted to highlight, many women said their upper bodies, while others celebrate their bottoms, waists, legs and hips. For retailers

and brands, this means that there is no one “right way” to design for this cohort, and strategies around fit will need to be developed alongside a true understanding of your customer’s real life.

Innovative brands are working toward this, speaking on a panel at the CURVYcon 2019, Good American co-founder Emma Grede said: "We are in a time where we all talk about female empowerment, female choice, body positivity, but are still very dictated to in terms of what a plus size body should be allowed to wear."

She said that being new to working in plus size meant that she didn't have any preconceptions of what people might like. "What I found very quickly with Good American, was that the people with experience were the ones saying don't do the lace-up jeans in a size 24, or do less. But it was the first thing to sell out -- it was the customer voting for more daring, more fashion-forward items. The choice has always been made for me - the customer is there, she is voting for what she wants and it's been an incredible education for us."



Image: Matt Sayles / AP, theCURVYcon Powered By Dia&Co.

One of the CURVYcon's signature panels is "Dear Retailer," which encourages an open dialogue between plus retailers and the real women who shop with them. From left to right Chastity Valentine, Co-Founder of the CURVYcon, Nadia Boujarwah, Co-Founder of Dia&Co, Janice Wang, CEO at Alvanon, Emma Grede, Co-founder of Good American, Liz Munoz, CEO at Torrid and Kenya Mollie, Project Runway, Season 16.

EDUCATION BECOMES KEY

As the number of plus size consumers is set to continue to grow at twice the rate of the rest of the market, there is a need for more designers able to design well for this community.

For instance, Wang said that Alvanon has tried to give universities plus sized fit forms and the universities said they didn't want them. "What does that say about their commitment to the next generation of plus size designers? If they could just take a plus mannequin to work with, that would at least be a start."

According to Alvanon data, in the last seven years, from 34 fashion schools

globally, 963 forms were purchased, of which only 15 were plus size forms, making up only 1.5% of academic form sales.

The future of plus size will require more normalisation to prevent the average US plus-size woman feeling discriminated against when she goes to get dressed.

Dia + Co co-founder Nadia Boujarwah said the next chapter of life for the plus sector will not be to rely on the "courage of individual women", but for the world to begin to change, so that "it does not require boldness and courage to go and live our lives fully,

which is really about addressing sizes and making sure it's not radical for us to be able to do all of the things we want to do."

This will require systemic change from the industry across many fronts not just in how we design. It will require businesses to extend how they view plus size from 12/14-24 through to 32 and beyond.

For efforts in plus size to truly succeed, they will require businesses to think beyond product and to bring plus size women into their businesses and marketing across all kinds of roles.

Muñoz says that Torrid needs to work on "inclusivity for real" which means that it is listening to feedback from customers that say it doesn't have bigger girls in its marketing, that it doesn't have girls that are shaped like them. "Not everybody is hourglass, some women have a belly," and businesses need to ensure that women can see: 'how is this item going to look on me'?"

For Grede, this is already a reality for Good American, which shoots products on every size. This is something that she says has paid huge dividends for the business. "If a size 20 woman is coming onto the site, she doesn't want

to see an item on a size two," Grede said.

Additionally, retail strategies require that plus size women have associates that look like them and understand their specific needs in-store. Muñoz says that having women who understand the product and your body is "transformational", explaining how she walked out of a Torrid store, having bought five dresses after 20 years of thinking they didn't flatter her.

As retailers work to remain relevant through the retail apocalypse, knowing the reality of your customer's true shape remains key. Not knowing

this means you're leaving significant amounts of money on the table.

"Every single woman should have the right to feel strong in her own body," said Wang.



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