The president of a company specialising in the issues surrounding the fit of apparel says most global brands today are working with a fit model that fails to match the shape of twenty-first century consumers.

Brands need to shape up on fit



Offering clothes across the world in as small a range of sizes as possible may make life simpler for the product management teams at apparel companies, but it's bad news for customers. One size doesn't fit all, and what fits the Finns and favours the French may sit sack-like on consumers in China and leave their counterparts in Japan feeling frustrated.

It's a big wide world for apparel companies, with sports brands, arguably, the most internationalised of all. It's a pity then, according to Ed Gribben, that these same brands have been paying too little attention to fit for too long. Mr Gribben, president of Alvanon—a technology provider that scans and collates data on the shape of people's bodies in different parts of the world— says most brands are working with models and measurements that are outdated. It is his company's stated aim to help companies that make and sell clothes around the world improve their performance on fit by offering information as well as mannequins, pattern blocks and other tools. Sports and outdoor brands that are already on the company's client list include Reebok, Nike, Puma, Land's End, Under Armour, Eddie Bauer and REI.

Body shape

"Everyone is interested in the expanding retail power of China these days," Mr Gribben says, offering a first example, "but not enough people have stopped to consider that the shape of bodies in China is different. The fit of many clothes that are being imported into the Chinese market today does not work and you can't just size down. This is really about the body shape."

Basing fit on incorrect conceptions of the way people's bodies curve (or don't—more on which in a moment) costs brands money, Alvanon argues. If an item feels too shapeless or too tight, customers will return it to the rail after trying it on, often leading to substantial mark-downs. If consumers do buy an item and decide later that it's not for them (owing to the fact that the fit of it is more suited to the anatomy of people on the other side of the world) they will send it back and are less likely to choose the same brand again the next time they're looking to add to their wardrobes.

Mr Gribben's company believes it's in a good position to help apparel brands address this question because of the work it does to monitor body-shapes in different parts of the world. "We work with a Dutch brand," he says, "and, as is well known, Dutch people are the tallest in the world in terms of average height. The brand also sells its clothes in Italy, however, and, while Dutch women are, on average, 1.78 metres tall, the average in Italy is 1.64. In the Netherlands, one in five women is taller than 1.80 metres, whereas, in Italy, only one woman in 50 is. This is a big deal."

Shopping mall scans

As well as monitoring relevant data that's already in the public domain, such as statistics from the World Health Organisation, Alvanon has collected more than 160,000 body scans of its own in the US and Canada, 35,000 in China, 30,000 in western Europe and 15,000 in Japan.



The Chinese market is of great interest to most sports brands, but clothing manufacturers should bear in mind that people in China tend to have straighter, less curvy bodies.

Nike



Alvanon makes its own mannequins to help apparel manufacturers get the shape and fit of their products right for each market.

Alvanon

The usual way of carrying out this exercise is to set up in a shopping mall with a special booth containing sensitive millimetre wave scanners that accurately measure fully-clothed participating shoppers in seconds, taking 45 body measurements from each person. In return, each participant receives a free print-out of their own measurements, allowing them to make more accurate decisions when shopping for clothes, in stores or online.

During a recent exercise in China, Ed Gribben says the public there offered perhaps the most enthusiastic response Alvanon has ever had. Over 28,000 people in four key regions of the country took part. "People were queuing up and we took 800 scans a day," he says.

Hourglass figures

The data is only of value when you interpret it, of course. And not even 45 separate measurements can immediately reveal the differences in body shapes around the world; you have to join the dots to make the full picture. We are all familiar with the classical hourglass figure, universally appreciated as beautiful thanks to beautiful women who helped make it famous, including Sophia Loren, Marilyn Monroe and Rita Hayworth. However, according to Alvanon's data, only 8% of women in northern Europe today have that shape, whereas 20% of women in southern Europe can lay claim to an hourglass figure. This means that one shape of garments, even for Europe, will not do.

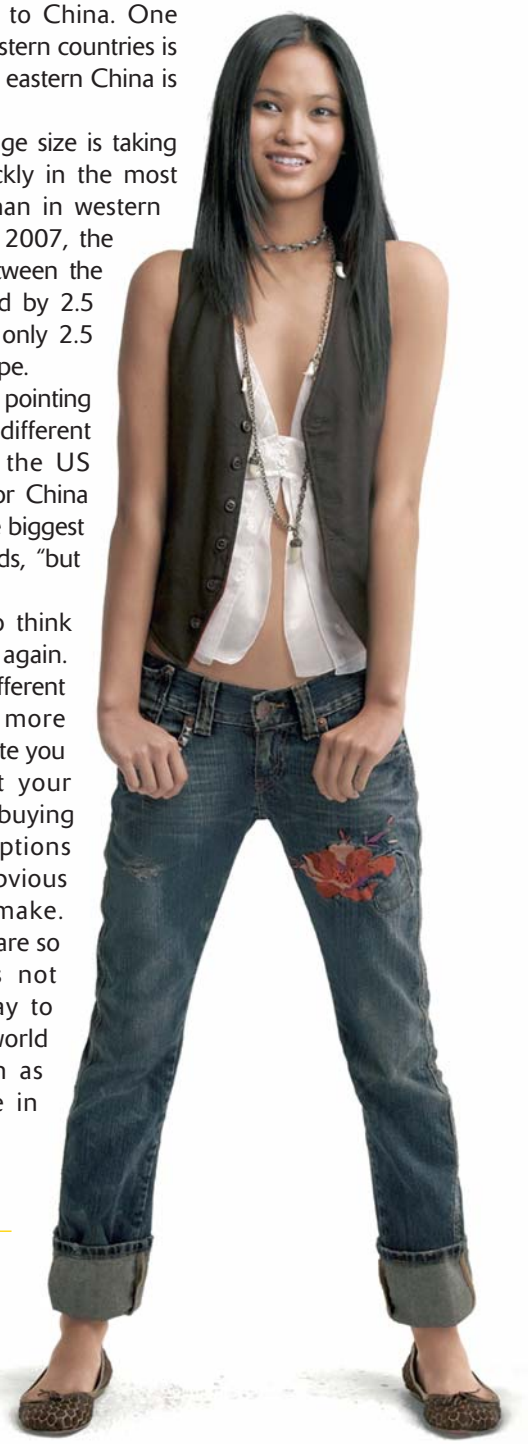
The most immediate conclusion the Alvanon president has drawn from the Chinese body measurement study is that Chinese bodies are "different". The Chinese body is, in general, very straight, he continues. The Japanese body, by comparison, is quite curvy.

Highlights of the research show similar average heights in China compared to the US, but people in the Asian country have "dramatically different" average chest and waist measurements, as well as differences in average weight and body mass. Women in China have much narrower variances in bust, waist and hip measurements than those in the US. As a result, Alvanon concludes, the US market requires more than double the number of clothing sizes to reach the same percentage of the population compared to China. One trend that is consistent with western countries is that the younger generation in eastern China is growing taller and heavier.

In fact, this increase in average size is taking place considerably more quickly in the most prosperous parts of China than in western countries. Between 1997 and 2007, the average height of children between the ages of eight and 12 increased by 2.5 centimetres in China, and by only 2.5 millimetres in the US and Europe.

Mr Gribben illustrates this by pointing out that Levi Strauss has 26 different sizes of women's jeans for the US market, 12 for Europe, nine for China and only four for Japan. "It's the biggest denim brand in Japan," he adds, "but four sizes are enough."

It's important for brands to think about these matters, he says again. The more stock keep units (different products) you have, the more material and the more real estate you will use up in carrying out your business. If it turns out the buying public finds some of the options unusable, there could be obvious savings for you to make. Populations around the world are so diverse that a single fit is not possible, but the correct way to tailor your offering for the world market is to know as much as possible about what people in different countries require.



In Japan the biggest denim brand Levi Strauss manufactures just four different sizes of women's jeans compared to the 26 produced for the US market.

LS&Co.