

## Fashion Size Matters - UK - July 2010

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### What is this report about?

The plus-size (women 18+ and men XL+) market is growing strongly and is estimated to increase at a faster rate than the mainstream clothing market as Britain's population ages and becomes more overweight. Despite the increasing demand for plus-size clothes, Mintel's research reveals that many plus-size consumers remain deeply unsatisfied with the current offer available to them at both specialist and non-specialist retailers.

Retailers' attempts to flatter women with vanity sizing (whereby retailers are increasing sizes in order to make consumers feel better about themselves), have not paid off and media coverage of this has fuelled rising discontent about inconsistencies in clothes sizes between brands and retailers. Only 15% (3.9 million) of all women find it easy to buy clothes that fit, with one in five having trouble with fit due to their awkward body shape.

### What have we found out?

- In the last five years, Mintel estimates that the plus-size market for womenswear (sizes 18+) has increased by 45% to £3.8 billion in 2010. Compared to growth in the overall womenswear market of 15%, this is a very strong performance and shows the increasing importance of plus-sizes to the overall clothing market. Larger-size menswear has grown steadily by 6% to £1.9 billion between 2005 and 2010.
- While older people are more likely to wear plus size clothing, a growing number of women aged 35-44 also buy plus sizes and more than a third of men aged under-35 wear XL sizes. Retailers need to start designing more trend-led clothing for this younger age group, with these consumers tending to be more fashion aware than older people.
- More than half of plus-size women continue to suffer from a lack of choice to cater for their size, suggesting that retailers have not done enough since the last Mintel report, which found a similar rate of discontent about lack of choice, to provide a greater range of clothes and specific collections for these consumers.
- Over four in ten women that wear sizes 18 and over find that clothes in their size tend to be less fashionable than smaller sizes.
- One in five women blame their trouble finding clothes to fit on an awkward body shape, with size 14s and 16s suffering most from a different top to bottom size.
- Discontent about inconsistencies in clothes sizes between brands and retailers is on the rise and has been fuelled by media coverage of the increased use of vanity sizing by retailers. Retailers need to work in collaboration to regain the confidence of consumers over sizing.

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