



Realising the opportunities of the plus size market

Helen Jack
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We do it with

GUSTO

**N BROWN
GROUP PLC**

Where Fashion Fits!

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Who is N Brown?

- We are a leading internet and catalogue home shopping company with over 140 years of experience in the distance shopping market. Extensive ranges of value products, principally clothing, footwear, household and electrical goods, primarily in larger sizes serving niche markets.
- Brands include Simply Be, High and Mighty, Jacamo, Figleaves with JD Williams at its core. Making fashion fit and look good, regardless of our customers' shape & size.

Simply Be

HIGH AND MIGHTY

Jacamo

JD williams

 fingleaves.com

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Brand Positioning



Challenges of serving the plus size market

- Understanding the plus size consumer – Attitudinally
- Understanding the plus size consumer – Physically
- Changing competitor landscape
- Stock keeping for size range needed to cover all niche product ranges

Sizes 10-36

Calf Fittings
Standard to Super Curvy

Men's Sizes
34-54" Waist
36-66" Chest

Bra Sizes
28-58 A-L

Width Fittings
Wide E to Widest 6E

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Understanding the consumer - Attitudinally

Research Groups

U&A Study

Immersion Sessions

Kantar market data

I want feminine underwear, comfy shoes, going out clothes and everyday essentials and I want my style too...

In the right clothes I feel very confident!

Need longer length dresses, sleeves on tops and shrugs to cover up bigger bits.

I want narrow shapes, not baggy ones, but clothes that don't gape or ride up. It's got to fit my body.

If I find something I like I will buy it in every colour.

We don't want to be treated differently, put at the back of the shop or upstairs, that's why I like Simply Be, they treat you with respect.

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Understanding the consumer - Physically

Health Surveys for England

Fit Models on Real Customers

Customer Surveys

Clever choice of fabrics and subtle use of elastication achieves ease for different body shapes.



Samples developed on three sizes 12, 16, 22 bespoke mannequins used by us and suppliers, to create a consistent fit.

I will wear skinny jeans and jeggings and boyfriend cardies, JD Williams won't let me look foolish.

Clothes are styled and fitted to 'Flatter the Figure' and make our Customer Feel Good.

Styling is modified to suit our target customers for better comfort in wear

I know I'm big, but when you are wearing great clothes people notice that and not your size, that's when you know you've got it right!



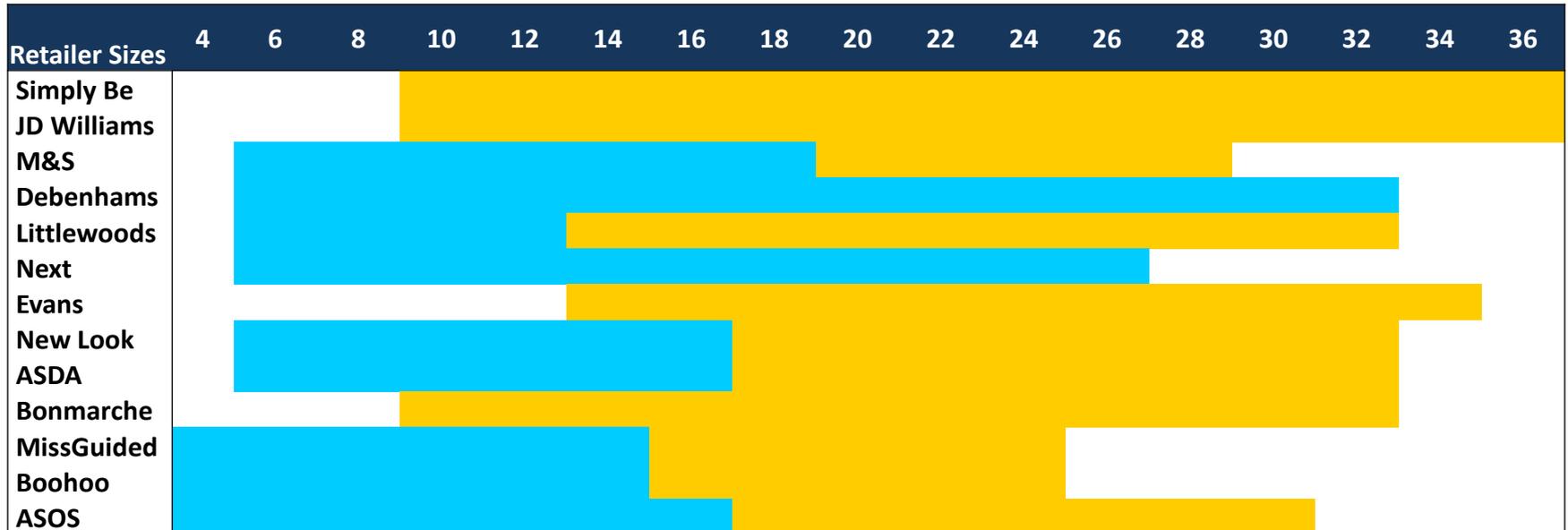
How the Plus Size Consumer has changed

- UK women tend to have an increased waistline with a slight 'Tummy', stooped posture and a lower bust line.
- The average Bra-Cup size is fuller, size D/DD.
- Feet have spread with increased need for wide fits.
- The plus size consumer is also in transition, body confidence is firmly on the agenda and curves are 'in'.

The competitor landscape and influence of online

More competitors offering larger sizes

Online searching & delivery suits plus size



Plus size is extensively searched for online and continues to be a key driver of traffic to sites.

 Dedicated Plus Size Range
 Full size Range

Personalised e-mails means I get the products appropriate to me and can go directly to the website

I'm so busy I don't really have time to shop in stores and can avoid the stigma of being big.

I like shopping online, you can put your size in and see what's available.

Technology Usage – Simply Be



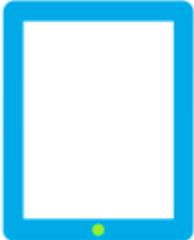
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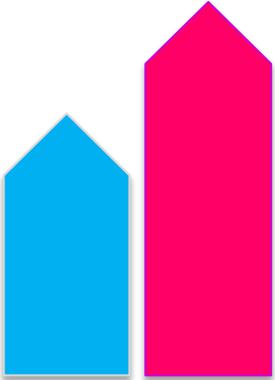
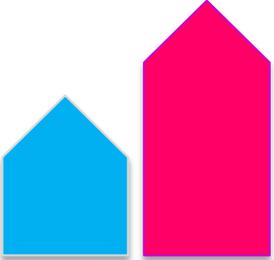
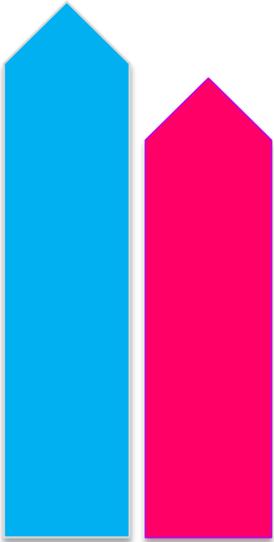
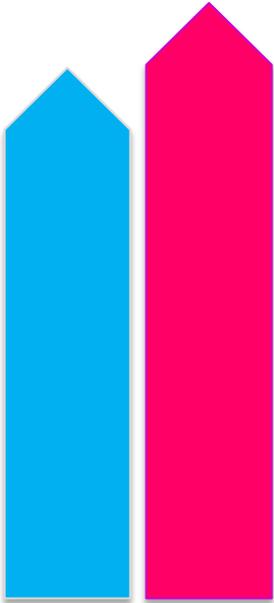
Purchase Desktop



Purchase Smartphone



Purchase Tablet



Over Half
30-49yr women
are
multichannel
Buyers

Showcasing Online

Opportunity to highlight fashion credentials

With a focus on Fit

Personalisation

JEANS FIT GUIDE



LUCY
SUPER SKINNY HIGH WAISTED

Presented by Bloggers

Combines product endorsement and relevant sized models



I'd like to see clothes shown on larger models

I would like to see styles that I wouldn't normally wear, and be given advice on how to wear them.

Putting the Customer at the heart of the organisation



RAD 2015 Winners!
**Employee
Engagement
Programme**



Realising the opportunity of the plus size market

- **Make garments stylish but comfortable, where fashion fits!**
- **Be inclusive & personalise**
- **Size appropriate product presentation**
- **Online important**
- **Continually Innovate**
- **Market and consumer insight**
- **Put the customer at the heart of the organisation**