

 <p>Association of Suppliers to the British Clothing Industry</p>	<p>ASBCI INDUSTRY CONFERENCE</p> <h2>THE FIT FACTOR</h2> <p>World class wisdom on fashion sizing and fit.</p> <p><i>Corporate sponsors: Alvanon + Lectra UK Media sponsor: just-style</i></p>	<p>Thursday 5th March 2015</p> <p>10.00am to 4.30pm</p> <p>Peterborough Marriott Hotel Sir Henry Royce Suite</p>
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‘The Fit Factor – World class wisdom on fashion sizing and fit’ conference review

The recent ASBCI conference, 'The Fit Factor – World class wisdom on fashion sizing and fit', played host to an international line up of technical experts and market and consumer research specialists, who shed new light on practical solutions to winning the sizing and fit battle in the apparel and lingerie industry.

Sponsored by apparel expert Alvanon and Lectra, the world leader in integrated technology solutions and supported by media sponsor just-style.com, the sell-out conference attracted over 200 delegates from retail, manufacturing, technology and academia. Delegates heard how C&A, M&S, JD Williams and Tesco have embraced the latest 3D virtual product design and development technologies, new online consumer engagement strategies and consumer research to help them improve fit, increase brand loyalty, reduce returns and development lead times while increasing full-price sell throughs and conversion rates.

The keynote presentation was delivered by size and fit guru **Ed Gribbin, president of Alvanon**, who declared that, “retail today is broken”. Despite the huge wealth of expertise available it is still proving difficult for the industry to pull it all together. An NPD Group survey found that 80% of consumers are unhappy with fit. He advised delegates to look for inspiration outside the apparel box and pointed to technology giant Apple as an example of how a successful business can operate by treating “design as a science”. Key attributes of the tech world include low returns, high sell through rates and huge profitability, which is in stark contrast to the shortcomings of the clothing industry. He added, “the brokenness begins at the design stage” in the apparel field due to aesthetic criteria being given precedence over technical fit practices. He urged delegates to use solid science as the basis of their designs and share consumer shape standards, pattern blocks, technical fit forms and grading rules with everyone involved in the product development process.

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Fluctuations in body types across regions exacerbates the sizing and fit challenges for intimate apparel explained **Julia Mercer, lingerie technical manager at Marks and Spencer**. She shared commissioned research findings that showed 23% of women have never been fitted for a bra, and more worryingly, 82% had been fitted in the wrong size. Detailed research was conducted across 28 countries to gather intelligence on body shapes as a way of tailoring fit more accurately to the profile of each country. International size conversions and a myriad of grading rules further add to the confusion. However, the successful launch of the M&S Bra Fit Calculator app and online service, offers an innovative, yet simple solution. Consumers are asked to take just one measurement, followed by a short series of aesthetics based questions to reveal the correct size and most suitable styles for that particular person.

Providing a live masterclass demonstration on how to take exact measurements for bespoke tailoring was **Philip Parker, vice chairman, Henry Poole & Co**. The Savile Row craftsman offered traditional and detailed instructions for perfectly measuring a customer for one of a kind attire. He spoke of the importance of figuration and how to accommodate finer details, such as sloping shoulders, into patterns. For a precise fit, balance was identified as key and how seemingly minor adjustment can make all the difference to a piece fitting or not. He cautioned that the majority of problems occur when trouser patterns are cut incorrectly, and should that be the case, then the best solution would be start again. With prices starting at £4500 for a bespoke outfit, alterations need to be done with absolute care with sometimes up to four fittings with the customer to ensure a beautiful end result. Parker concluded that once the basics of measurement have been mastered, the rest is down to experience.

Following on with a variation on personal tailoring was **Graeme Pratt, technical designer, BMB Clothing**, which is made up of 98% ready-to-wear and the owner of 47 brands from the wholesale and retail sectors. He noted that over the last decade menswear has been radically influenced by womenswear trends and has increased requests for styles with a closer and shorter fit. To face the challenge head on, BMB extends its service to personal tailoring, an avenue not suitable for all due to limited style options and fabric choice. Trends show that people are willing to pay more for a British-made suit, and that customised tailoring is very much a viable option for a number of budgets.

Taking into account the complications of sizing and fit for fast-fashion on an international scale was **Alan Wragg, technical director, Tesco Stores**. With retail making up 11% of Tesco's business and stores across central Europe and Asia, plus franchises in Switzerland and Gibraltar, the challenge is how to make product have consistent handwriting whilst reflecting differences. Fit assessment for F+F, Tesco's in-house fashion line, exposed a number of issues such as inconsistent fit of the same product from different suppliers, each factory created its own patterns and the goal posts often moved in terms of grade rules. This lack of cohesion prompted the brand to refine its process by investing in Modaris, the 3D virtual design and product lifecycle management solution from integrated technology specialist Lectra.

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For its Tesco schoolwear collection, pattern and grade rules were verified virtually on avatars, and this coupled with data from the ShapeGB Children's Size Survey delivered more accurate and consistent fit. It achieved an 81% first time fit approval rate and a significant decrease in returns. Using Modaris *Tesco* has reduced return rates from around 19% in 2013 to 14% in 2014. "We worked out that each 1% return saving, saves us over £750,000." explained Wragg. However, the biggest advantage the technology yielded were significantly shorter lead times due to time saved by the drop in numbers of physical prototypes produced. Tesco has calculated that cutting lead times by one to two weeks on around one-third of the styles in its F&F clothing range adds 4-8% to net margin and generates savings of between £20m and £40m and saves *more than £3m on bank interest*: "If we can make one less sample on 50% of all of the products we make, then we can save something like one or two weeks in lead time. And that means we sell more at full price rather than having to mark down, and that's a big margin difference, something like 4-8% more net margin....We worked out that if 30% of the lead time was reduced due to us fitting things quicker and getting things approved and into production quicker, we'd save between GBP20-40m. So there's a really tangible benefit if we can make that saving in lead time."

The average dress size in the UK is estimated at size 16, but with no official source on this, or what is classed as 'plus size', retailers therefore often have misinformed interpretations. **Ian Mitchell, business unit director, Kantar Worldpanel Fashion** identified wearers of size 18+ clothing account for 1 in 5 women in a market worth £3 billion. Motivations behind plus size consumer shopping habits revealed that age and lifestyle were not the only influences on expenditure. A direct correlation between spend and attitude means women who are more interested in fashion will always spend and shop more, regardless of size or age. Although attitude is the overall driving force behind spend, analysis shows that preferences of plus size women are more geared towards appropriateness, fit and comfort of clothing. Therefore, retailers need to focus more on shopper behaviour than dress size. The plus size debate will no doubt continue.

Helen Jack, market & customer insight, J D Williams, continued the plus size discussion by assessing the challenges of serving the market. She explained that understanding consumer attitudes and physicalities by directly involving shoppers in extensive research is essential in gaining a robust understanding of consumers' fit issues. Feedback reveals customer likes and dislikes, and provides a clearer picture of how to adapt findings into business decision making. The customer wants to shop in the same way as everyone else, with the same amount of options and for collections to be endorsed by relatable body shapes. The changing competitor landscape means retailers must seek ways to differentiate, such as having varied size ranges across niche product areas and upgraded communication strategies. Doing all the work behind the scenes is counterproductive if the customer is unaware it is for their benefit. Specialised product and personalised communication will greatly assist in building consumer trust and loyalty.

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Jackie Lewis, UL Technical Services, C&A Buying gave a candid account of the international retailer's experiences with fit inconsistencies in a market where the consumer is being offered variation rather than choice. A new management team is now driving further improvements in customer experience at C&A to address common challenges such as ownership of fit, the use of inappropriate fit models, unclear combination of sizing methods across ranges and speed to market. To turn things around, investment was poured into rebuilding the technical structure, partnerships were formed with technology experts to develop fit forms and strict processes were embedded for pattern cutting. Lewis said that continuous work on fit is essential for success and the value retailer cannot afford to ignore it.

Assessing the situation from an ecommerce standpoint was **Fiona Graham, head of quality assurance; Debenhams** who said the amount of choice today breeds huge size and fit inconsistencies amongst retailers. The size of a garment does not indicate how it will fit and so the customer is taking a gamble on finding the desired result. Multiple purchases lead to higher returns rates, which heavily impact on profitability. It was advised that to communicate size in a more effective manner examining customer feedback is vital. Making assumptions as to what longer length, petite fit or generous sizing means to the customer is not enough. Investing time with the consumer directly and utilising data practically will make it easier to hit the moving target. Emerging technology such as digital tape measures and in-store body scanners are predicted to become commonplace fixtures in an attempt to make the size and fit struggle a thing of the past.

Leonie Barrie, managing editor, just-style.com and event media sponsor, wrapped the day up by concluding that the speed at which bodies are evolving and markets are emerging, means there is no quick fix to the size and fit quandary. She stated that the industry must acknowledge that today's broken model can be repaired with fresh foundations, increased collaboration across departments and investment in technology. Barrie said the call to industry is to, "know who the customer is, keep engaging with them and be consistent to gain trust". The costs are too high to ignore.

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Notes to Editors

About Lectra

Lectra is the world leader in integrated technology solutions that automate, streamline and accelerate product design, development and manufacturing processes for industries using soft materials. Lectra develops the most advanced specialized software and cutting systems and provides associated services to a broad array of markets including fashion (apparel, accessories, footwear), automotive (car seats and interiors, airbags), furniture, as well as a wide variety of other market sectors, such as aeronautical and marine industries, wind power and personal protective equipment. Lectra serves 23,000 customers in more than 100 countries with 1,500 employees and \$281 million in 2014 revenues. The company is listed on Euronext. For more information, please visit www.lectra.com

About Alvanon

Founded in 2001, the Alvanon Group of companies is the global leader in providing growth, profitability and supply chain solutions to the apparel industry. In addition to its head office in New York, European headquarters in London, Asian office in Hong Kong and manufacturing facilities in Donguan and Shenzhen in China, Alvanon has a worldwide team of dedicated apparel strategists and specialists. Alvanon has compiled the world's largest database of 400,000 body scans and provides customized fit and product development strategies and tools to the world's leading fashion brands, retailers, lingerie, swimwear, sportswear, mail order and corporate clothing suppliers. For more information, please visit www.alvanon.com

About Just-Style.com

Established in 1999, just-style is a leading online resource for global apparel and textile sourcing industry and retailers, publishing a mix of news articles, analysis features and insights every working day. Under the direction of managing editor Leonie Barrie, its experienced team of journalists, consultants and analysts provide a unique blend of apparel, textile and footwear industry news, interviews and research that is delivered to over 100,000 business executives per month. Via its web site, webinars and in-depth management briefings just-style offers insight into apparel sourcing and supply-chain trends, brand and corporate strategies, CONSULT research platform, enterprise technologies such as PLM and ERP, textiles and manufacturing developments and how clothing and footwear retailers perform around the world. For details of how just-style is "helping decision makers make decisions" visit www.just-style.com

About the ASBCI

The Association of Suppliers to the British Clothing Industry (ASBCI) is a not-for-profit UK-based organisation with a membership that represents all key sectors of the clothing and textile supply chain. Formed in 1992, it is the only forum of its kind where component suppliers and fabric producers can exchange ideas and knowledge with designers, retailers and garment cleaning specialists. It operates without commercial preference and its impartial stance makes it a unique organisation, within an intensely competitive industry, where members can meet, discuss issues and share their experiences – all together, at one time, in one place. Visit www.asbci.co.uk