5 REASONS WHY SIZE ISN’T FIT

(AND) HOW TO BUILD SHOPPER CONFIDENCE
EXECUTIVE SUMMARY

CONSUMERS INCREASINGLY WANT THE RIGHT FIT, FIRST TIME, EVERY TIME. A RECENT RAKUTEN FITS ME SURVEY INTO SIZE DISPARITY SHOWS HOW THIS CHANGE IS BRINGING NEW CHALLENGES TO THE RETAILER, WITH CONVENTIONAL SIZING STRUGGLING TO ANSWER THE CURRENT TREND TOWARDS PERSONALISED FIT.

Today’s average woman changes size 31 times throughout her adult life, with men not far behind at 24. Upsizing is disappointing for consumers, making them more reluctant to visit retailers and less positive about shopping for apparel overall. With traditional sizing still following the framework of its 1940s origins, retailers must not only find new ways to overcome multiple changes in the individual’s body shape and weight, but ensure they can find fit online, a process which over 86% of respondents considered a gamble.

To further complicate things, 6 out of 10 consumers now deliberately choose different sizes within the same brand or retailer, preferring clothes with a tighter or looser fit. It is not simply that body shapes have changed over the decades or that an individual’s shape evolves over time – consumers are intentionally moving away from their ‘traditional’ size.

It’s a lot to get right. To find loyalty, reduce returns and meet the needs of the increasingly diverse and ever changing shopper, retailers need in-depth information about their attitudes towards fashion and how it affects the way they buy clothes. Only armed with this knowledge can they apply new tools to navigate their customers towards the right fit.

THE SURVEY
Rakuten Fits Me conducted research into size disparity and the relationship that customers have with size and fit. The research was conducted via One Poll in the UK with a 2,000-person online panel, split evenly across men and women.

**Do you ever buy different sizes from the same retailer?**

- Yes – all the time: 7.5%
- Yes – sometimes: 40.45%
- No: 52.05%

Rakuten Fits Me and One Poll research, October 2016
1. FIT IS DYNAMIC. SIZE ISN’T.

Size has a dramatic influence on the lives of consumers. Used by retailers to grade shoppers and help profile manufacturing requirements, it is the metric that directs customers towards fit and has significant value to their sense of self-worth. However, it has also become a source of frustration and disappointment. A recent survey by Rakuten Fits Me shows how traditional sizing is undermining trust and loyalty towards retailers and brands.

Some of the reasons behind this mistrust are straightforward – downsizing makes a customer feel good while upsizing makes them feel less attractive (The Effect of Clothing Size on Self Esteem and Body Image, Kinley 2014). The frequency of change in body shape throughout an individual’s life suggests that fashion shopping is becoming more of a challenge for consumers.

The survey also exposes a new attitude towards size. It is no longer the final barometer of fit with customers purchasing different sizes within a single brand, confident enough in their own fashion choices to tailor fit to different needs and events in their life.

This means an individual’s interaction with fashion is no longer a few fixed points, but a continual conversation that takes place throughout their life. Retailers that solve the issue of changing body shape and fit preference across the digital and physical space will inspire their customers – gaining loyalty, increasing sales and reducing returns.

▶ Change in consumer attitudes means change for the industry. The retailer that can solve the issue of fit across the digital and physical space will not only gain the loyalty of their customers and reduce returns, but also inspire them.
2. THE NEW SHAPE OF CONSUMERS

The average woman in the survey changed dress size over 31 times during her adult life. Men typically went up and down a size 24 times. The factors triggering an increase in size varied for different groups, with stress at work the primary cause for men, younger women citing life events such as marriage and childbirth, and the 55+ age group reporting retirement as the main influence.

Critically, all groups saw change as a common and emotive event, with the consumer having to rediscover their size in the marketplace multiple times over the course of their lives. Overall, more than half (53.2%) of respondents interviewed were currently unhappy with their weight or body shape, with the 35 - 44 age group most likely to be dissatisfied. The fashion retailer has become more than a mere marketplace. With consumers upsizing and downsizing on a regular basis, the 'shop' has become a place of self-discovery where they are confronted with body shape changes and must search for solutions. It is at these moments that traditional sizing can undermine the relationship shoppers have with 'their' brands, making the importance of understanding fit critical to the retailer.
Do you ever avoid going shopping because you’re concerned you won’t be able to find an item of clothing that fits as you would like?

Prior to shopping for clothes do you ever worry about getting something that fits well?

Rakuten Fits Me and One Poll research, October 2016.
4. OPPORTUNITIES IN THE DIGITAL MARKETPLACE

At first glance, online retail offers many opportunities to restore trust and encourage loyalty. Digital e-commerce gives the consumer privacy, a wider selection and generous returns policies. Yet these advantages are undermined by the same issue: the broken relationship between size and fit.

The vast majority (79%) of respondents in the survey still felt the only way to ensure fit was to try clothes on in store. Four out of five that did purchase apparel online regarded the process as a gamble, with traditional sizing providing no clear, easy way to find fit for their particular body shape. Previous studies have shown that even generous return policies can’t bridge this gap, especially amongst men.

So, despite their anxieties about the physical retail world, the digital marketplace is yet to give consumers a viable alternative. The strategies currently employed to encourage online purchases carry significant costs and are insufficient to overcome the additional barriers they bring. Customer reluctance to embrace fashion e-commerce indicates that the shopper still needs and trusts the personal touch of the physical retail environment.

Thankfully, new tools and increasingly sophisticated ways of capturing data give the retailer opportunities to fulfil these needs in the e-commerce environment. Adopting a personalised fit approach, based on an in-depth understanding of customer profiles and preference, can transport the conversation from the shop floor into the digital space.

**When buying clothes online, do you think it is a bit of a gamble as to whether the item will fit as you hope?**

- Yes – very much: 13.84%
- Yes – somewhat: 25.27%
- No: 60.89%

**From the following reasons for not buying clothes online, choose those that apply to you.**

- When clothing items arrive they never look or fit as you hoped: 73.05%
- You like to try items on before buying them: 59.38%
- You can’t get a sense of how garments fit or feel: 22.66%
- Other: 3.71%

Rakuten Fits Me and One Poll research, October 2016
5. THE COSTS OF SIZE DISPARITY

Retailers have long been aware of their customers' troubled relationship with size, and have attempted to appease them by adjusting sizes to meet the demographics of their market. This tactic was recognized by 75% of respondents in the survey, who were fully aware that a women's size 12 in one retailer could be a 14 in another.

While the benefit of this strategy is obvious, it increases customer confusion and inhibits them from trying different brands and retailers. This can have positive effects (by locking customers into a specific brand), but also risks alienating them when their body shape inevitably changes and they are forced to look elsewhere for a new fit.

Online, the problem is magnified. With inconsistent sizing as their only available guide, consumers are reduced to searching for clothes they are already confident will fit. They arrive in a digital wonderland displaying an encyclopaedic range of styles, the vast majority of which remain out of bounds because the customer is unable to reconcile size with their individual body shape.

This lack of clarity increases the potential for disappointment, further breaking down trust between consumer and retailer in the e-commerce market.
THE POSSIBILITIES OF INDIVIDUAL FIT

THERE IS ONE FINAL, CRITICAL CHANGE IN ATTITUDE THAT THE RAKUTEN FITS ME SURVEY REVEALED. AN EVOLUTION IN CONSUMER BEHAVIOUR THAT EXPOSES THE LIMITATIONS OF SIZE IN THE CONTEMPORARY WORLD: FIT IS PERSONAL.

To the consumer 'fit' is no longer an objective measurement of body shape, but a reflection of their personal choices. As the chart below shows, three-quarters of all respondents in the survey took multiple sizes into the fitting room, with 7 out of 10 women and half of men buying different clothing sizes from the same retailer.

Why? The respondents were not insecure about their choices – 8 out of 10 were confident they knew what looked best on them. Rather, their choices were based on preference, with 61.5% saying they deliberately went up or down sizes because they wanted a tighter or looser fit.

In other words, the customer has started to self-tailor in the retail environment. At best, traditional sizing has become an unreliable navigator to find correct fit, at worst a hindrance in their search.

This presents the retailer with an opportunity. Despite apprehension about size, the consumer is increasingly confident and willing to trust their own instincts when it comes to fit. If their individual preference can be captured and updated as they evolve, the retailer can reach out and guide them towards exciting new experiences in the fashion marketplace.

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**Do you ever buy different clothes sizes from the same retailer?**

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<th>Male</th>
<th>Female</th>
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<tbody>
<tr>
<td>No</td>
<td>4%</td>
<td>11%</td>
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<tr>
<td>Yes - sometimes</td>
<td>52.50%</td>
<td>28.40%</td>
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<tr>
<td>Yes - all the time</td>
<td>43.50%</td>
<td>60.60%</td>
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**When trying items on in the fitting room, do you often take several sizes of the same garment in with you to try on?**

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<tr>
<td>No</td>
<td>17.01%</td>
<td>58.43%</td>
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<tr>
<td>Yes - sometimes</td>
<td>58.43%</td>
<td>24.56%</td>
</tr>
<tr>
<td>Yes - some of the time</td>
<td>24.56%</td>
<td>11%</td>
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Rakuten Fits Me and One Poll research, October 2016.
The message from the Rakuten Fits Me survey is clear: consumers have discovered their own concept of fit, one based on body shape and personal choice. Size is still an important tool in their journey to find fit, but it is unreliable and often leads to an unsatisfying shopping experience across both physical and digital marketplaces.

It’s time for retailers to focus on fit, body shape and how people like to wear their clothes. These are the key factors in a customer’s decision to buy that perfect dress or shirt, and they cannot be communicated through size alone. New solutions on the market that capture and interpret individual customer data, however, can add this layer of personalisation. Utilising these tools enhances the personal touch of in-store shopping and brings that understanding of customers into the digital world.

Making fit visible means less frustration, less disappointment and greater freedom to explore and try new things. It can reduce reluctance to visit physical retail spaces and remove the risk associated with shopping online. Fashion retailers who offer a positive experience, with outcomes based on a better understanding of their customer’s body shape and fit preferences, will be rewarded with increased loyalty, fewer returns and a better bottom line.

In short, it’s time to stop the size rollercoaster and make fit easily accessible to every customer, however they shop.
Our knowledge can be yours. Understanding the choices and fit profile of your customers lets you tailor a shopping experience that suits them. Make their time with you a personal, rewarding experience they’ll want to return to.

Visit Fits.me to book your demo today.