The women’s plus-size apparel market has been growing faster than the apparel market overall in the US, and analysts predict that the segment will continue to grow faster than the overall clothing market in coming years.

1) American shoppers spent $21.4 billion on women’s plus-size clothing in 2016, according to The NPD Group.

2) Consumer survey data indicate that more than a quarter of American women browse plus-size clothing.

3) Newer retailers such as Torrid and Eloquii have emerged to serve younger and more style-conscious shoppers. Meanwhile, JCPenney has invested in its plus-size offering and Walmart is reportedly set to unveil a new, low-cost plus-size clothing brand of its own.

4) According to data from the US Centers for Disease Control and Prevention, the obesity rate among American women ages 20 and over is approximately 38%.
Introduction

The average American woman wears a size 16–18, according to a recent study, and women’s plus-size clothing sales have been growing faster than total apparel sales in the US, according to market research firm The NPD Group (NPD). The firm forecasts that the plus-size market will grow at an average of 4% annually from 2015 to 2020, from $20 billion to $24 billion. The total clothing market is forecast to grow about half as fast over the same period, at an average annual rate of 2.1%, according to Euromonitor International. The gap between these growth forecasts suggests that plus sizes present a bright area of opportunity within apparel retail.

To better serve this growing apparel segment, many department stores, midmarket retailers and e-commerce sites are redefining and/or expanding their plus-size ranges, offering more stylish options in more sizes. Women who wear plus sizes have been vocal in recent years, particularly on social media, about their desire to buy fashionable, trendy clothes in the same fabrics and styles as offered in so-called straight sizes. Social media influencers and the rise of the body positivity movement have contributed to shifting cultural attitudes toward those who wear plus sizes, and retailers and designers that have prioritized their plus-size offerings have seen success in recent years.

In this report, we review data on plus-size sales in the US and pull together consumer survey data from Prosper Insights & Analytics, NPD and others to gauge the percentage of American women who shop for plus-size clothing. We then examine what retailers and brands are doing to better serve this market and the opportunities it presents. We provide data on obesity levels by age and ethnicity in the final section of the report.

The Plus-Size Women’s Clothing Market in the US

Sales Figures

Although Americans are generally spending more cautiously on apparel than they used to, the women’s plus-size market has been growing faster than the apparel market overall in the US in recent years. According to the latest available data from NPD, US retailers sold $21.4 billion worth of women’s plus-size clothing in 2016, and we estimate that plus-size sales represented around 17.5% of all women’s clothing sales that year. Between 2012 and 2016, US sales of women’s plus-size clothing grew by a total of 23%, according to NPD. By comparison, US sales of all clothing grew by 9.9% over the same period, according to the US Bureau of Economic Analysis.

<table>
<thead>
<tr>
<th></th>
<th>2012 (USD Bil.)</th>
<th>2016 (USD Bil.)</th>
<th>Total % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women’s Plus-Size Clothing</td>
<td>$17.4</td>
<td>$21.4</td>
<td>23.0%</td>
</tr>
<tr>
<td>All Clothing</td>
<td>$281.5</td>
<td>$309.4</td>
<td>9.9%</td>
</tr>
</tbody>
</table>

Source: NPD/US Bureau of Economic Analysis/Coresight Research

We estimate that plus-size sales represented around 17.5% of all women’s clothing sales in 2016.

The plus-size market will grow at an average of 4% annually from 2015 to 2020. The total clothing market is forecast to grow about half as fast over the same period.

Figure 1. US: Women’s Plus-Size Clothing and Total Clothing Market Value, 2012 vs. 2016
In 2016 alone, US sales of plus-size women’s apparel rose by 6%, according to NPD. By comparison, the total clothing market grew by just 1.6% that year, per the US Bureau of Economic Analysis.

In addition, NPD forecasts that the US women’s plus-size apparel market will grow at an average of 4% annually from 2015 to 2020, from $20 billion to $24 billion. The total clothing market is forecast to grow more slowly, at an average annual rate of 2.1% over the same five-year period, according to Euromonitor International, indicating that plus sizes present a bright area of opportunity within apparel retail.

Percentage of American Women Who Shop for Plus-Size Clothing
To get an idea of how many American women buy plus-size apparel, we reviewed consumer survey data from Prosper Insights & Analytics, NPD and others. There are two ways of estimating the plus-size market: gauging the number of shoppers who buy from clothing ranges that include larger sizes (usually defined as size 14 and above) and gauging the number who buy from ranges specifically branded as “plus size.”

According to survey data from Prosper, about a quarter of US women have browsed plus-size clothing in each of the past three years, and that percentage has remained fairly steady year to year. The firm’s most recent survey, conducted in April 2017, solicited information from more than 6,000 US Internet users ages 18 and over who buy women’s clothing. One survey question asked respondents which size group of women’s clothing they browse most often. The question did not ask respondents if they browse dedicated plus-size brands, which means that the data should represent total plus-size shoppers, including those who browse sizes 14 and higher in regular (not specifically plus-size) clothing ranges.

Figure 2. US: Women’s Clothing Consumers—Responses to “Which Size Group Do You Browse Most Often?” (%)

<table>
<thead>
<tr>
<th></th>
<th>Apr 15</th>
<th>Apr 16</th>
<th>Apr 17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misses</td>
<td>26.2%</td>
<td>28.6%</td>
<td>45.1%</td>
</tr>
<tr>
<td>Petite</td>
<td>25.4%</td>
<td>28.6%</td>
<td>46.0%</td>
</tr>
<tr>
<td>Plus Size</td>
<td>25.8%</td>
<td>29.4%</td>
<td>44.8%</td>
</tr>
</tbody>
</table>

Base: 6,000+ US Internet users ages 18+ who buy women’s clothing, surveyed in April of each year shown
Source: Prosper Insights & Analytics

While the Prosper survey found that more than 25% of American women have browsed plus-size clothing in recent years, data from the US Centers for Disease Control and Prevention (CDC) indicate that the obesity rate for American women ages 20 and over is 38%. Although there is no direct
relationship between clothing sizes and obesity rates, that percentage
difference suggests that plus-size shoppers underindex in apparel spending
relative to their share of the US female population.

Figures from a yearlong project that HanesBrands conducted with “curvy”
women (the consumers the company worked with prefer the term “curvy”
to “plus-size”) provide further support that there is a gap between the
percentage of American women buying plus-size clothing and their share of
the population: the company found that 35% of women are considered plus
size by age 25 and 44% are considered plus size by age 33.

The teen plus-size market has also been growing in the US, and NPD
reported that the proportion of US female teenagers buying plus-size ranges
doubled from 16% to 34% between 2010 and 2015. The firm surveyed 13–
17-year-olds in 2010, 2012 and 2015, asking whether they ever buy clothing
considered “special size” for themselves. The phrasing of the question
suggests that respondents may shop for ranges that are specifically
marketed as plus-size lines.

![Figure 3. US: Female 13–17-Year-Old Consumers—Responses to “Ever Buy Clothing
Considered ‘Special Size’ for Yourself?” (%)](chart)

Source: NPD

**The Opportunity**

A study published in the *International Journal of Fashion Design, Technology
and Education* in August 2016 found that the average American woman
“wears between a Misses size 16–18, which corresponds to a Women’s Plus
size 20W, with greater distinctions found when considering race and
ethnicity.” Sizing is inconsistent among brands, so it is somewhat difficult to
gauge what constitutes a typical range in plus sizes: some companies carry
plus sizes in a OX–3X range, while others offer sizes up to 7X. Many others
carry plus sizes in a 14–26 or 14–34 range, referring to subsets of these as
either Misses, Women’s or Plus sizes. Despite the variances, most in the
industry seem to refer to sizes 14 and higher as plus sizes.

In recent years, many plus-size consumers have complained to fashion
reporters and on social media that the clothes offered in their size are
unfashionable and too limited in range. Some have also said online that
sales associates have treated them poorly in stores. In addition, department
Some 72% of respondents do not believe that fashion designers create their designs with the average American woman in mind.

stores and other retailers have traditionally located their plus-size clothing ranges at the back of stores or on higher floors, and have devoted much less selling space to plus-size apparel than to straight-size apparel.

The fashion industry, too, has been long been accused of treating plus-size shoppers as an afterthought because of designers’ perceptions that clothes do not look as flattering on plus-size people and that offering plus sizes negatively affects a brand’s image. Industry perceptions that plus-size women were less willing to spend on expensive apparel have also long bubbled under the surface—the thinking was that plus-size women might lose weight, and that they would not want to spend much on clothing that would fit them only for a short time.

These factors have led many plus-size shoppers to shop online, where they can often find a greater range of offerings in their size. However, a recent survey conducted by Dia&Co, a clothing subscription service for women who wear sizes 14 and above, found that the majority of plus-size shoppers are still looking for better options. The January 2017 survey polled 1,500 American women ages 18 and up who reported wearing size 14 or higher and also self-identified as plus size. The survey found that the main reason respondents believe designers do not include larger sizes in their lines is that those sizes do not fit the designers’ image. Other key findings of the survey include:

• Some 72% of respondents do not believe that fashion designers create their designs with the average American woman in mind.

• Approximately 78% would be willing to spend more money on clothing if more designers offered plus-size options.

• Some 68% are interested in participating in fashion trends, but 67% feel that there are not as many fashionable clothing options available in their size as they would like.

• About 93% believe it is important for designers to create clothing lines that are size-inclusive, and 97% would think more positively of a designer who included plus-size clothing in a line.

• Some 97% believe it is important for designers to include plus-size models in runway shows.

• About 80% would be likely to purchase an item from their favorite designer if that designer began to offer plus-size clothing.

Despite plus-size shoppers’ continued disappointment over the options available to them, things are beginning to shift, both culturally and in retail. Social media influencers and the rise of the body positivity movement have contributed to changing attitudes toward those who wear plus sizes, and retailers, seeking pockets of growth in an apparel market where sales growth has been slowing, are beginning to catch up and respond to these historically underserved shoppers. Today, many retailers and brands are serving plus-size shoppers more proactively, offering them more fashionable choices in stores, online and through other options such as rental services.
Newer retailers of plus-size clothing, such as Torrid and Eloquii, have emerged to serve younger and more style-conscious shoppers.

Plus-Size Women’s Clothing: Retailers and Brands
Lane Bryant and Avenue are well-established, leading specialized plus-size retailers in the US. Lane Bryant operates more than 800 full-line and outlet stores in 48 states, targeting women ages 30–45 who wear plus sizes. In a December 2017 online survey of more than 10,000 North American consumers conducted by customer experience firm Market Force, Lane Bryant ranked as consumers’ second-favorite retailer after Nordstrom. Avenue operates approximately 300 stores offering clothing in sizes 14–32. Privately held Ashley Stewart returned to profitability after twice filing for bankruptcy and now operates 89 stores in the US as well as a thriving e-commerce business.

Newer retailers of plus-size clothing, such as Torrid and Eloquii, have emerged to serve younger and more style-conscious shoppers. Torrid is growing fast: the company grew sales by 30% year over year in the first quarter of fiscal 2017 (ended April 29, 2017), driven by comparable sales growth of 12% and a 29% increase in space. (We discuss Torrid in our Deep Dive: Reviewing 2017’s Retail IPOs report.) Eloquii, originally part of The Limited, relaunched in 2014 as an online-only retailer focused on trend-driven fashion with a fast-fashion element.

A number of other retailers, such as Kohl’s, Walmart and JCPenney, are reviving or expanding their plus-size offerings. At New York Fashion Week in September 2017, Lauren Conrad launched a limited-edition runway collection for Kohl’s that was her first LC Lauren Conrad brand collection to include items in plus sizes (ranging from 0X to 3X). The brand will reportedly add plus sizes permanently to future collections. In March 2018, Walmart introduced a new plus-size line called Terra & Sky in stores and online.

JCPenney is among the US department stores with the strongest plus-size offering, and management has stated that the company seeks to become a destination for plus-size shoppers. The retailer has established large plus-size sales sections in stores and, in March 2017, the company’s chief merchant told Glamour magazine that “in 2016, sales for the plus-size area were better than the rest of women’s apparel combined.” Our recent research on women’s jeans and dress ranges offered on various department stores’ websites found that JCPenney was the retailer that offered the highest percentage of its women’s jeans in plus sizes, with some 37% of jeans sold on its site available in plus sizes.

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Jeans</th>
<th>Dresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>JCPenney</td>
<td>37%</td>
<td>17%</td>
</tr>
<tr>
<td>Kohl’s</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>Nordstrom</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

As of March 2018
Source: Company websites/Coresight Research

Nonspecialized, mass-market retailers such as Forever 21 and Target are also reported to be popular destinations for plus-size shoppers. Forever 21 faced criticism for featuring “average size” models and too small a range of
sizes in its Forever 21 Plus line when it first launched its plus-size offering, but the retailer appeared to address the criticisms before relaunching the brand in early 2017. Target has offered plus-size clothing under the Ava & Viv brand since 2015. Online retailer ASOS, which targets shoppers in their 20s, is among the newer e-commerce companies that are seeing significant numbers of plus-size shoppers.

In the plus-size activewear and sportswear segment, Nike launched a plus-size range in March 2017 and plus-size shoppers looking for workout wear, activewear and swimwear can also now shop for those items at retailers ranging from Old Navy to Lane Bryant to Nordstrom to Amazon.

On the designer front, website 11 Honoré launched in August 2017 carrying apparel in sizes 10–20 from designers such as Prabal Gurung, Zac Posen and Monique Lhuillier.

Lingerie is one of the fastest-growing plus-size categories, according to IBISWorld research cited by Bloomberg in September 2017. HanesBrands launched two new plus-size lingerie lines in 2017, and JCPenney, Lane Bryant and PVH Corp. have also added to their plus-size intimates offerings. PVH bought e-commerce lingerie startup True & Co. in 2017 and, according to Bloomberg, plus sizes account for 56% of True & Co.’s sales.

New business models such as fashion rental, led by Gwynnie Bee in the plus-size segment, and personal styling subscription services, such as Stitch Fix, are also offering fashion-conscious plus-size shoppers greater choice online. Gwynnie Bee offers women’s plus-size fashion rentals by online subscription, targeting professional women ages 28–45. Subscribers can rent items in sizes 10–32 from more than 190 brands. Since 2012, Gwynnie Bee has increased its sales by 10%–15% annually, according to an October 2016 article in Fast Company, becoming one of the largest purchasers in plus-size fashion. (We discuss apparel rental, including Gwynnie Bee, in our Deep Dive: Millennial Lifestyles Drive Growth in Apparel Rental report.)

Online styling service Stitch Fix extended its offering to include plus sizes in early 2017 and now offers items in sizes 14W–24W and 1X–3X. Stich Fix customers receive a curated selection of items to try on at home, and then keep only those they want to buy.

**US Obesity Rates and Average Clothing Sizes**

According to data from the CDC, the rate of obesity among American women ages 20 and over is approximately 38%. The CDC determines obesity by using weight and height to calculate a body mass index, or BMI, number. Adults with BMIs of 30 or higher are considered obese. The CDC says that “for most people, [BMI] correlates with their amount of body fat.”

Non-Hispanic black women have the highest age-adjusted rates of obesity among American women, followed by Hispanic women, non-Hispanic white women and Asian women, according to the CDC. Euromonitor International forecast that, in 2017, the obesity rate among all North Americans ages 15 and older would reach 42.7%.
March 29, 2018

Figure 5. Prevalence of Obesity Among American Women, by Ethnicity (%)

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>2011–2014 Prevalence</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>35.5</td>
</tr>
<tr>
<td>Black</td>
<td>56.9</td>
</tr>
<tr>
<td>Asian</td>
<td>11.9</td>
</tr>
<tr>
<td>Hispanic</td>
<td>45.7</td>
</tr>
</tbody>
</table>

Data are the latest available and are for 2011–2014.
Source: CDC

Obesity rates in the US are higher among middle-age women and older women than among younger women.

Figure 6. Prevalence of Obesity Among American Women, by Age (%)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2011–2014 Prevalence</th>
</tr>
</thead>
<tbody>
<tr>
<td>20–39</td>
<td>34.4</td>
</tr>
<tr>
<td>40–59</td>
<td>42.1</td>
</tr>
<tr>
<td>60+</td>
<td>38.8</td>
</tr>
</tbody>
</table>

Data are the latest available and are for 2011–2014.
Source: CDC

Among American women, average clothing size and waist diameter have increased over the past few decades.

Figure 7. US: Average Clothing Sizes and Waist Measurements for White, Black and Mexican-American Women

<table>
<thead>
<tr>
<th>Years</th>
<th>Average Clothing Size</th>
<th>Average Waist (Inches)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007–2010</td>
<td>16/18</td>
<td>37.48</td>
</tr>
<tr>
<td>2003–2006</td>
<td>16/18</td>
<td>37.05</td>
</tr>
<tr>
<td>1999–2002</td>
<td>16</td>
<td>36.50</td>
</tr>
<tr>
<td>1988–1994</td>
<td>14</td>
<td>34.88</td>
</tr>
</tbody>
</table>

**Key Takeaways**

The average American woman now wears a size 16–18 and recent CDC data indicate that the rate of obesity among American women is approximately 38%. However, consumer surveys indicate that only about 25% of American women browse plus-size clothing, suggesting that women who wear plus sizes underspend on apparel relative to their proportion of the US population. This is likely due, in part, to consumers’ dissatisfaction with the range of choices provided to them, as many women who wear plus sizes feel that clothing in their size is not trendy or fashionable.

Nevertheless, plus-size apparel sales have been growing faster than apparel sales overall in recent years, and a number of retailers have revamped or expanded their plus-size offerings in order to better serve this growing market segment and take advantage of the opportunity it presents. Analysts and researchers predict that the US plus-size market will continue to grow at a faster rate than the apparel market overall, so more retailers and brands are likely to prioritize this consumer segment in coming years.