Slavishly devoted

Are we slaves to fashion, or is fashion in thrall to us? Researcher Helen Bakewell reports that as the rules of life have changed, so must fashion and the way we approach it.

The other day I was driving through North Sydney. It was a really cold day for Sydney, about 11 degrees. I was dressed in two jumpers, woollen pants, thick socks and boots.

No, I wasn't a fashion statement; I was a symbol of warmth.

I pulled up to the traffic lights as the lights turned red and the green man flashed. Then I saw "the fashion statement".

A 20-something woman walked onto the pedestrian crossing. She wore a mid-riff top, hipster pants and leather thongs on her feet. Even from 20m away, her feet looked blue.

I reflected that recent medical research indicates that women who wear hipsters are more likely to suffer back problems, and are more likely to develop fat around their mid-riff as their body redirects fat to this exposed area to protect their kidneys from the cold! I wondered if 20-something knew?

So the question arises: are we slaves to fashion or is fashion our slave? Are we spending more, or less, on fashion? As we age, how do our fashion needs change? And most importantly, after the reinvention of hipsters, what's next?

First the traditional definition of fashion. Fashion relates to clothing, footwear and accessories such as bags and sunglasses.

Over the past two decades, fashion spending by Australians has recorded only moderate growth.

In the past 20 years, overall spending on retail has increased by 6.5 per cent a year on average, while fashion spending has increased by only 4.9 per cent annually. So while spending on fashion continues to increase, it doesn't do so at the same rate as overall spending on retail.

Meanwhile, the disposable income of Australians has increased by 6.6 per cent a year in total, bearing in mind that the average annual increases includes inflation and population as well as real rises in consumer spending.

Tony Dimasi, the managing director of Dimasi Strategic Research, says: "Fashion spending as a proportion to total spending has shown a declining trend over the past 20 years. In 1984, fashion spending represented 3.6 per cent of total disposable income, whereas today it is only 2.7 per cent".

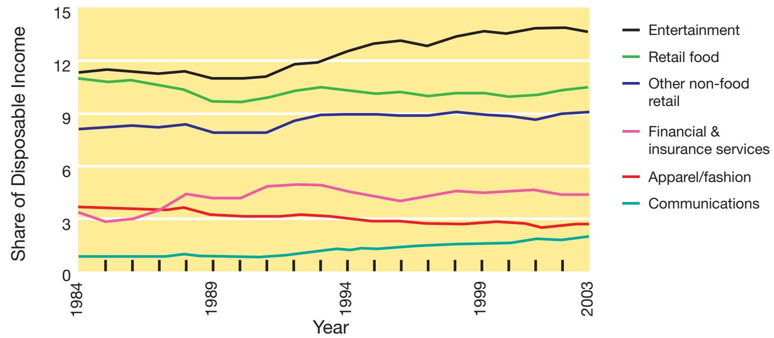
Chart 1 illustrates the share of disposable income directed to key segments of consumption spending by the Australian population from 1984 to 2003. What we see is an illustration of the declining trend of fashion spending as a proportion of income.

On the other hand, consumption spending on entertainment, communications, financial insurances services and all other non-food retailing has increased as a proportion of disposable income.

It is important to note, however, that the total value of retail spending devoted to fashion by Australian consumers is still quite substantial at around $14 billion for 2003 (including GST), representing an average spend of $702 per person.

So if $702 per person is the average, what is the difference between the sexes? Men are estimated to spend around 65 per cent less

Chart 1: Share of Disposable Income Directed to Key Segments of Consumtion Spending by Australians, 1984-2003



Source: Australian Bureau of Statistics; Dimasi Strategic Research

***Entertainment includes National Account categories Recreation & Culture and Hotels, Cafes & Restaurants**

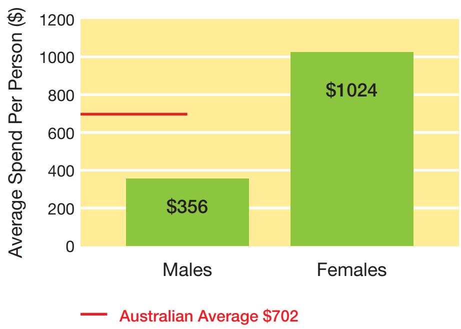
than women on fashion. On average, men spend $356 a year whereas women spend around $1024 per annum.

Tony explains: "Some of this difference in spending between genders is due to a sizeable proportion (around 12per cent) of women's fashion spending being directed towards items of men's clothing, i.e. women buying for sons and husbands."

So women spend more than men on fashion - no surprises there. But what about Australia's ageing population?

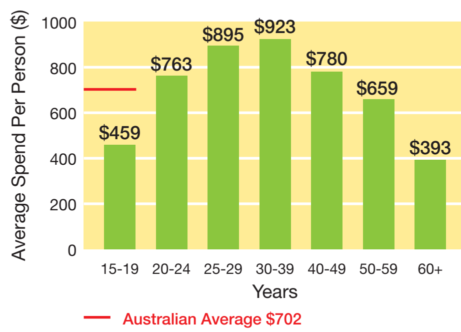
Spending on fashion is highest in the 30-39 year age group at around $923 per person and lowest in the 60 years and over age group, at $393. Miss 20-something spends between $763 to $895 a year depending whether she is in her early 20s or the business end of her 20s!

Chart 2: Average Per Capita Fashion Spending by Gender, 2003



Source: Market Data Systems; Dimasi Strategic Research

Chart 3: Average Per Capita Fashion Spending by Age Group, 2003



Source: Market Data Systems; Dimasi Strategic Research

Table 1: Provision and Performance of Fashion Specialty Retailers in Major Australian Shopping Centres, 1993 & 2002

Item	1993 No. of Stores	1993 GLA (q.m)	1993 T'over[1] ($000's)	1993 $/Sq.m	2002 No. of Stores	2002 GLA (q.m)	2002 T'over[1] ($000's)	2002 $/Sq.m	Average Annual Increase GLA	Average Annual Increase T'over[1]	Average Annual Increase $/Sq.m
Regional Centres											
Ladies Apparel	19.0	2041	13,519	6624	24.5	3091	19,578	6334	4.7%	4.2%	-0.5%
Mens Apparel	5.2	625	4537	7265	6.0	797	4651	5836	2.7%	0.3%	-2.4%
Jeaneries & Unisex	3.6	518	3033	5860	11.5	1874	11,701	6244	15.4%	16.2%	0.7%
Footwear	5.7	681	4217	6189	8.2	1027	6638	6463	4.7%	5.2%	0.5%
Fashion Accessories	4.9	267	1861	6978	5.5	313	2895	9249	1.8%	5.0%	3.2%
Total Fashion Spec.	**38.4**	**4132**	**27,167**	**6575**	**55.7**	**7102**	**45,463**	**6401**	**6.2%**	**5.9%**	**-0.3%**
DDA Based Centres											
Ladies Apparel	6.1	603	2759	4575	6.6	757	3370	4452	2.6%	2.2%	-0.3%
Mens Apparel	1.6	177	822	4637	1.6	224	951	4246	2.7%	1.6%	-1.0%
Jeaneries & Unisex	2.0	217	1024	4719	3.2	464	2226	4797	8.8%	9.0%	0.2%
Footwear	2.3	287	1231	4287	2.2	272	1333	4901	-0.6%	0.9%	1.5%
Fashion Accessories	1.8	94	498	5307	1.5	82	508	6195	-1.5%	0.2%	1.7%
Total Fashion Spec.	**13.8**	**1378**	**6334**	**4597**	**15.1**	**1799**	**8388**	**4663**	**3.0%**	**3.2%**	**0.2%**

1. Sales have been adjusted to include GST

Source: JHD Retail Averages

So what can we see from consumer spending behaviour on fashion? That women spend almost three times as much as men on fashion, and that there is a significant difference in spending per person across the age groups, with people aged 30-39 spending the most per person, which is around two-and-a-half times that of those aged 60-plus.

While fashion spending is a significant proportion of the overall retail market in Australia, it has experienced only moderate increases in spending volumes over the past two decades. As a result, fashion spending now comprises a much smaller proportion of a person's disposable income than was the case 20 years ago. That is not to say that fashion spending in total has declined, but rather that other segments of private final consumption have enjoyed stronger growth over this period.

With fashion spend falling as a proportion of disposable income, how does this relate to the all-important turnover of fashion in shopping centres which typically underpins an important component of the specialty income stream?

While growth in fashion spending over the past decade in particular has shown only a moderate increase relative to the other retail components of private final consumption spending, floorspace devoted to these uses in major Australian shopping centres has actually increased significantly. This situation can be seen from an analysis of the JHD Retail Averages from 1993 and 2002.

"The amount of specialty space devoted to fashion retailers in regional shopping centres has increased by around 70 per cent over the past decade," says Tony, "while it has

Think fashion, think everything...

By Jurek Leon

There is an assumption in retail that when we talk about "fashion" we are referring to clothing. Yet if we think like the consumers that frequent our centres, nothing could be further from the truth.

The heroin chic of the Milan or Paris catwalk doesn't influence today's consumers. Their fashion influences are the real fashion gurus to which they can relate.

To them, fashion is food from the sushi bar to the expresso bar. It's homewares, it's gardens, it's pets, it's cooking. It's lifestyle in so many ways other than clothes.

So the challenge for the Marketing Manager is, how do you integrate the traditional clothing stores within today's true fashion? How do you blend them as you create a customer experience that will interest, excite and delight in a way the clothing "fashion" retailers have long forgotten.

increased by some 30 per cent in discount department store-based centres over the same period.

"The majority of this increase in provision in the major shopping centres has been in two key segments, namely women's apparel and jeaneries, and unisex specialty shops."

However, while jeaneries and unisex retailers have shown similarly strong turnover - and turnover per square metre growth - over this period, rises in the turnover of women's apparel specialties in major centres has struggled to keep up with floorspace increases. As a result, the women's apparel segment in major centres has experienced a decline in turnover per square metre performance during this period.

In addition, while men's apparel specialties did not increase to the same degree as women's apparel and jeaneries and unisex specialties, this segment also has not maintained or increased its levels of turnover per square metre over the past decade in major Australian shopping centres.

Tony says: "What we see is the fashion segment of major Australian shopping centres has experienced a fall in performance as measured on a per square metre basis over the past decade, despite or perhaps because the provision of retailers in this segment have increased significantly over this period.

"Within this segment, however, some retailers - and particularly jeaneries and unisex specialties - have performed strongly."

Getting to the heart of consumers

So we've looked at the consumer spending and the performance of shopping centres, but what about the consumer who is doing the buying and who is predominantly female?

Vivienne Cable, of Image by Design, has more than 20 years' experience as an image consultant and stylist. She has some interesting insights on consumers.

"How to dress as a woman today is becoming more difficult for women as the responsibility for life broadens," she says. "People are finding fashion more difficult to buy because they do not know how it fits into the various compartments of their lives.

"Twenty years ago, women had three basic compartments - work, home and after-five. They kept clothing separated into those compartments. Today, the compartments have multiplied and crossed over."

She says they can include:

- Office/desk work (tends to be more casual).
- Office work with a client (fairly dressy).
- Casual Friday (undefined).
- Weekend wear.
- Special casual occasion.
- Special dress-up occasion.

"Planning a wardrobe today is like planning a dinner party for 12 in the 1980s," says Vivienne. "There are three to four courses, you have to work out who is coming, will they be standing or sitting, will it be inside or outside, will there be children or not, is it for socialisation or matchmaking?"

A significant issue for women is finding the time and inclination to plan their wardrobe. There is also a degree of skill involved. Many wardrobes are full of clothes past their use-by date.

According to Vivienne, the issue is two-fold. It is not just the complexity of our lives that is making fashion buying and co-ordinating difficult for women - it is also the retailers and manufacturers.

"Retailers need to understand the different compartments in people's lives, particularly women and the degree of cross-over." Vivienne says. "Much of the business attire for women is being portrayed in a more sexually aggressive format which most women don't aspire to and don't want to be depicted as in the workplace."

Vivienne's experience highlights that fashion is driven by age. Twenty-somethings are into throw-away, disposable fashion. They tend to copy what is in magazines to get "the look" but also tend to have lower incomes.

Then there are the 30 and 40-year-old women. When children enter the household, the income and the look tends to change. These women want to start buying something that looks more traditional. Less dressing to impress and more for comfort.

Vivienne explains: "Women in this group are still trying to find comfortable, stylish clothes which are often missing in the market. The main confusion is that nothing looks good on them anymore as they don't have their 20-something body size and they don't know what style fits."

Then there are the 30 and 40-somethings without children who tend to be able to dress in the sizes of the 20-somethings because their body has not changed as a result of having children, but also have difficulty in finding clothes that help them feel young but not "mutton dressed up as lamb".

Finally there is the largely forgotten market - the baby boomers and beyond. The big issue for the baby boomers is growing old and for them it is NOT OKAY. We have seen this rejection of ageing resulting in the growth of anti-aging cosmetic ranges, hair products and tummy tucking devices. To be a baby boomer with lots of lines and grey hair and so on is NOT OKAY for them.

The rules of life have changed and so must the fashion.

The social aspect of body image has also had an impact. The average age for anorexic girls has fallen from 14.5 years old to under 12. Plus there's been an increase in the number of men suffering eating disorders, and a growth in the number of people undertaking plastic surgery, getting tattoos and undergoing body piercing.

There's been a lot of research carried out in the UK, US and Australia into the sizing of clothes for women - looking at the mismatch between what's being made and the shape people really are.

As I explain in the accompanying article, studies were carried out in the 1920s and then subsequently in 1999 and 2000 both here and in the UK. They show definitively that women today are very different in terms of shape (as well as wardrobe requirements) to their grandmother or great-grandmother. Basically, they're bigger.

Surfwear company Rip Curl is now gathering data on girls and women aged 12 to 24 in an effort to make clothes that fit the modern body type.

So combine the picture of consumer spending with the information about how fashion retailing has changed, the issue of sizing, the changing demands of women's wardrobes and the question of ageing versus anti-ageing requirements, and you see why there's a degree of confusion in the fashion market.

Times they are a' changin'

It is not to say that the fashion industry has been idle. We have seen some innovations in recent years in fashion marketing.

Country Road introduced a campaign featuring ***Secret Life of Us*** actors Claudia Karvan and Vince Colosimo; Target introduced the Mary Kate and Ashley brand featuring the Olsen twins; Nike and Lego have launched footwear based on the Bionicles toy range; and there is talk that Kelloggs will launch a Special K clothing range.

There have been some interesting technological innovations, too - not least of which the child's shoe that can grow with his or her foot. The shoe expands from the centre and locks in place, enabling it to be adjusted by up to four sizes in half-size increments.

We've also got the Jogbra now, designed to eliminate chaffing and offer maximum support, while Triumph has introduced a moisturising clothing range, with the fabric in the inner lining being fused with Aloe Vera which, when stimulated with heat, releases a moisturiser.

Plus there's embedded scented fabrics and the Hollywood fashion tape, which sticks clothes to skin to prevent breast "spillage" and other unwanted exposure.

As well as new fabrics made from corn, which is softer than nylon and polyester and is UV resistant, jeans made from stinging nettles and lingerie made from human hair!

The changes aren't just technological, either. We are seeing shifts in the fashion industry by dominant and niche operators - for example, according to reports in retail publications, Walmart, the world's largest retailer, is now moving into fashion.

But amid all these marketing and technological changes, it seems the needs of the fashion buyer are somewhat more simplistic: it really comes down to sizing and suitability when faced with different lifestyle needs.

The decline in consumer spending in proportion to disposable income, rise in fashion space in traditional shopping centres, the question of what to buy, what size to buy and how to put it all together - it all presents both a significant issue and also an opportunity on many levels.

The stereotype of the "woman at home", the "working mother", the "single woman" and the "ageing woman" has become blurred and the fashion industry has an opportunity to help women structure their wardrobe for their new, and diverse, lives. Shopping centres have an opportunity to market these fashion retailers in the optimal format, and the fashion consumer has a chance to rediscover fashion - and purge her wardrobe of clothing past its use-by date. ■

Helen Bakewell is the Director of Directional Insights. With more than 12 years' experience in shopping centre research and marketing, and seven years as National Research Manager for Lend Lease Retail, Helen has launched Directional Insights (www.directional.com.au) to offer her experience to the Australian and international shopping centre and retailing industry. Contact her on (02) 8901 5258 or at helen@directional.com.au

The way we really are

By Helen Bakewell

There's been a lot of research carried out in the UK, US and Australia into the sizing of clothes for women - looking at the mismatch between what's being made and the shape people really are.

In the 1920s, Hestia's parent company Berlei studied Australian women aged 25-39 with the aim of understanding the shape of the female body here.

In 1999, Hestia commissioned the University of Newcastle to update the "Real Women" project, comparing it to the 1920s findings, and discovered that the 1999 25 to 39-year-old Australian woman is bigger and more robust than her 1920s predecessor. She is 3cm taller, 5kg heavier and her waist is 4cm wider.

The 1999 Real Australian Women is 164.5cm tall, weighs 65.9kg and has a waist, hips and over bust and under bust of 76.4cm, 101.6cm, 93.4cm and 79.6cm respectively.

In addition the project found that Australian women want to change their body shape, with 28.6 per cent wanting a smaller bottom and 31.3 per cent of women willing to have plastic surgery if money were not an issue.

In the UK, too, people's sizes have undergone scrutiny. Size UK is a national sizing study using body scanning technology to capture the size and shape of men and women, targeting around 11,000 people representing a cross-section of the population. While the information has not yet been released, the study is being replicated in the US.

But studies by UK retailer Marks & Spencer have shown that UK women also have grown since the 1920s, being 2.5cm taller, with a waist 20cm bigger, hips 15cm wider and feet two sizes bigger. Table 2 below illustrates the changes in UK women between the 1920s and 2000.

Table 2: UK Female Body Size 1920 - 2000

	1920 cm	1940 cm	1960 cm	1980 cm	2000 cm
Bust	81	84	86	89	91
Waist	51	53	61	66	71
Hips	81	84	84	94	97

Source: Size UK

Back here in Australia, the University of Adelaide's Anatomical Sciences team has been commissioned by surfwear company Rip Curl to find out how much the young female body has changed in the past century, and how to formulate clothing sizes for this "new woman".

Researchers will measure 2000 girls and women aged between 12 and 24, and gather data from more than 1000 women in NSW and Queensland.

Toni Stalls, garment technician with Rip Curl, says the project was a technician's initiative because: "It was recognised that we do not have the information required to do the job of local and off-shore manufacturing effectively.

"Without the correct and up-to-date information about the body dimensions of our market, everything is a hit-and-miss affair; much like shopping for clothing still is and shall remain until retailers and wholesalers fully understand the body image we are trying to fit."

While the information is not yet available for publication, Rip Curl kindly provided *Marketing Matters* with an image of the body matrix it is developing. Chart 4 shows the Rip Curl standard for average body sizing for the young Australian woman, as compared to the Australian Standard.

Chart 4: Rip Curl Body Matrix

Source: Rip Curl