WHITE PAPER

Retail Strategy Group

Don't Throw a Fit Over Fit

What the GLP-1 era reveals about fit, and how to bring the volatility under control.

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OVERVIEW

Executive Summary

GLP-1s are not the threat the apparel business believes they are. The headlines fixate on the demand side, most notably returns, and understandably so: rapid changes in weight and body composition should affect how a garment fits. But bodies have always been in flux. GLP-1s are simply one more variable, albeit an unprecedented one.

The more useful way to see the drugs is as a magnifying glass, one that exposes how inefficient the apparel supply chain already is. Planning assortments a year ahead of the season, and the trade-offs of a supply chain built for lowest cost, compound the fit problem. Internal misalignment early in product creation then cascades through the rest of the concept-to-market process. All the while, the customer keeps changing on a far faster timeline.

That is the core issue: the customer's body composition changes faster than a brand's planning and processes can accommodate. We call the gap between the two Fit Volatility™, and its size is driven as much by a brand's internal processes as by the customer or outside events. We offer five recommendations to bring it under control, ranging from immediate low-effort fixes to longer-term investments that pay off well beyond the current GLP-1 moment.

INTRODUCTION

Throwing a fit about fit.

It's an understatement to say GLP-1s have disrupted every consumer-facing industry, apparel included. Right now, the whole industry is throwing a fit about fit. The drugs have changed how fast bodies change and the impacts on fit are starting to show on the demand side of the equation.

For instance, PwC finds that 73% of current GLP-1 users report a meaningful change in clothing size. The Wall Street Journal, drawing on Narvar returns data, reports that the share of apparel exchanges where shoppers sized down has climbed three years running, reaching 14.6% in 2025, as customers buy multiple sizes and send back what no longer fits. Some bridal retailers now have customers sign a waiver acknowledging the gown does not yet fit, betting the body will meet the dress by the wedding day. Retailers absorb the rest with contingencies: restocking fees, alterations, looser exchange rules, and more inventory in smaller sizes.

But bodies have always been in flux, and fit has forever been one of apparel's hardest problems. From our perspective, GLP-1s have not created a new condition so much as distorted an existing one.

Here's how.

SECTION 01

The Customer Was Always Dynamic

The customer cannot be described by a singular factor or characteristic. Consumer behavior combines emerging trends, changing values and evolving preferences, all shaped by factors like career, wealth, education, external events and more.

The bottom line is that the customer is, and always will be, dynamic.

Fit is the sharpest proof of it. Fit is not a fixed attribute; it is the result of multiple forces converging at any given moment. A few of them:

- **Strength training** is reshaping bodies unevenly. Men are chasing glutes and quads. Women are lifting in record numbers, and it is becoming their most preferred gym activity, especially for those over 40.
- **Retirement is being redefined.** For some, working longer is a necessity. For others, it is a phased exit, an encore career, or a scarce skill set still in demand. Older bodies at work carry their own fit requirements.
- **Local trends are not national ones.** Cosmetic surgery preferences, diet, exercise habits, and cultural notions of a "proper" fit are all at play.

There are more forces than these, but the pattern holds: none acts in isolation, and none acts uniformly. The result is that fit stories get specific. A high-earning woman who strength-trains may also be navigating perimenopause. Families may choose to delay having children to chase careers, relocating as they go. An older man may stay in the workforce, skip retirement altogether, and become more active than ever. Little wonder fit is consistently cited as the top reason for apparel returns.

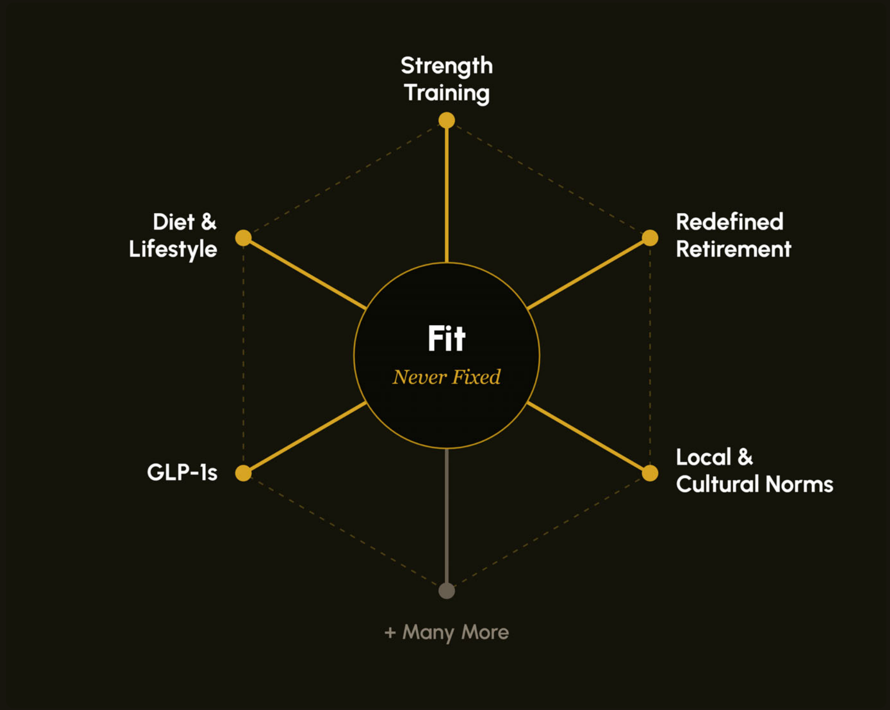

Figure 1. Multiple forces act on fit at any given time; none act alone, and none act uniformly.

GLP-1s are simply one more force acting alongside the rest. What sets them apart is speed: the pace of weight loss is unprecedented. And it is not only about lost mass, because without strength training, users shed a mix of fat and lean muscle. The sharpest twist comes on the way back. A patient who discontinues can regain roughly two-thirds of the lost weight within a year, and that rebound is rarely symmetrical, leaving the customer displaced from where they began.

SECTION 02

The Apparel Supply Chain Is Elongated and Slow

The apparel supply chain is among the most elongated, complex, and inefficient in business, largely because it has been optimized for one thing: lowest cost. As such, retailers and brands start planning their assortments a year ahead of the selling season and maintain purely transactional, sometimes adversarial, relationships with their vendor base.

It is not uncommon for concept-to-market timelines at non-fast-fashion brands to run on a 12-to-18-month timeline. As a specific example, on recent earnings calls, Lululemon said its mainline development calendar had run as high as 18 to 24 months, and that it is actively working to bring it down to 12 to 14.

Adding complexity is the fact that brands work on multiple seasons at once, so feedback from the current season rarely returns in time to shape the next. Overdevelopment is baked into the model. Brands guess at what the customer wants and make too much. Not all of it sells at full price, and the leftovers are marked down. This is the core of John Thorbeck's "Make 10, Sell 3" model, in which the margin on the three that sold must cover the seven that did not. Or the opposite happens: a style wins, and the brand stocks out with no way to chase the demand.

SECTION 03

Internal Dysfunction Adds Delays

The internal processes within retailers and brands compound the fit problem. Fit lives in design, size lives in planning, and the two rarely interact. Planning commits to size depth and curves at the very start, before a single garment has been fitted, and from there no one closes the loop: planning is not in the room for fittings, and orders are not revisited before they ship, so neither a garment that runs large nor a customer dropping a size gets corrected before the buy is locked. On top of this, technical design updates the master fit blocks only every three to five years, so the baseline barely moves while the body keeps changing. No one owns both fit and size, yet each depends on the other, and the moment you commit at the style or SKU level, months out, you are betting the garments will fit by the time they reach the market.

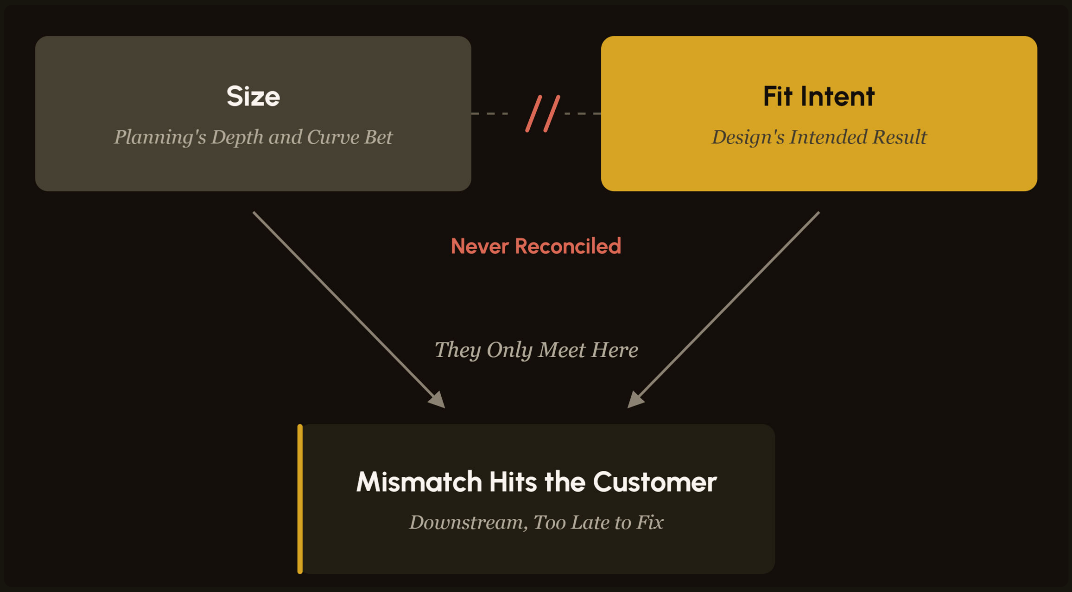

Figure 2. Fit intent and size are only loosely connected, at best. The customer feels the impact.

SECTION 03 · FROM THE FLOOR

Proto review is the one point where fit intent is meant to get locked before commit. It is exactly where you'd expect the gap to close. Instead, here is a VP of Supply Chain at a $1B lifestyle brand:

> *Fit sessions are poorly attended and rescheduled multiple times to accommodate the design team. Sessions are rushed and fit decisions are delayed or not made. The head merchant, who attended nothing, later sees protos and hates them. They call for complete refit of one-third of season styles two weeks prior to commits. The team and vendors scramble to try to get it done but deliveries are delayed by two weeks. Even worse, due to the large number of changes in such a short time, fit problems emerge after delivery.*

VP, SUPPLY CHAIN
$1B LIFESTYLE BRAND

Meanwhile, the customer continues to evolve.

Fit Volatility™

We can now name the condition. Fit Volatility™ is the gap between how fast a meaningful portion of a brand's customers change their size, shape, or fit expectations and how fast the brand's processes and planning can accommodate that change. The wider the gap, the higher the volatility, as shown in Figure 3.

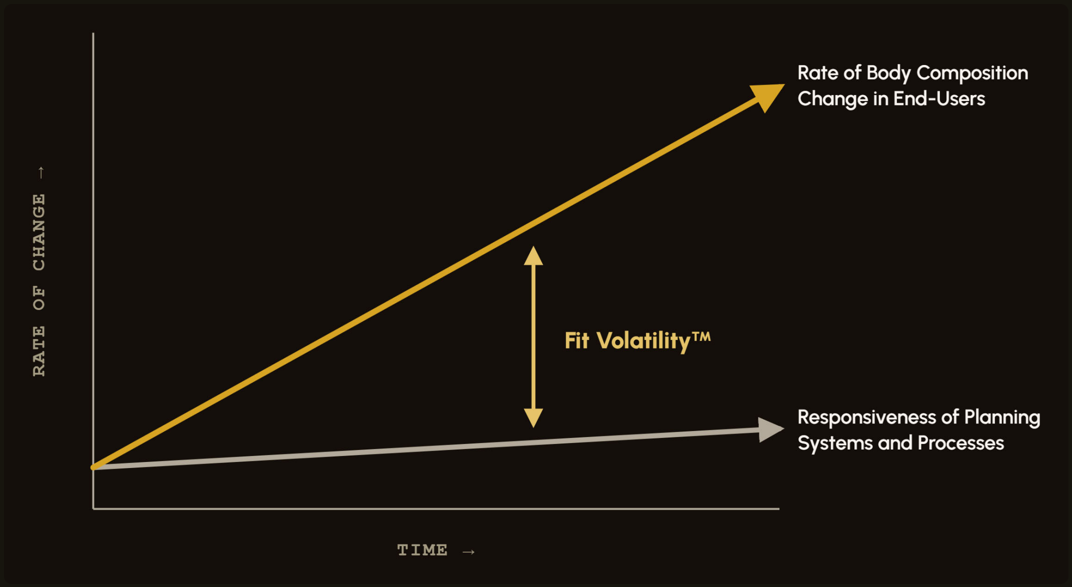

Figure 3. Defining Fit Volatility.

The size of that gap is set by four factors: brand-vendor relationships, internal processes, customer dynamics, and external forces. GLP-1s belong in the last category, an external force, though they act on the customer through the third, reshaping bodies faster than any prior force. Whatever the classification, the bottom line is that they did not create the gap. The weight loss and rebound rates simply distorted one that already existed.

We bring these four factors together in a Fit Volatility Index, shown below. For simplicity, each factor is weighted equally and the final score is the average of the four. This is admittedly arbitrary, and the absolute value matters less than the relative scores. But presenting it this way surfaces the most important point in the framework: if internal processes are out of control, the index stays high even when the brand understands its customer perfectly.

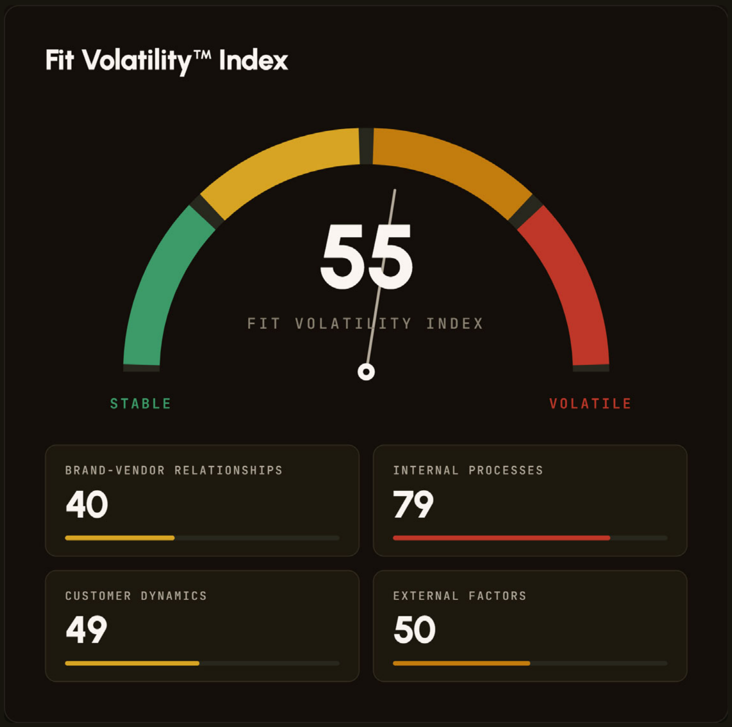

Figure 4. The Fit Volatility Index. The lower the score, the better.

That is the strategic heart of Fit Volatility. A brand cannot score its way out of a volatile condition strictly from the demand side. Getting control of internal processes and strengthening brand-vendor relationships, the two factors a brand actually owns, is what absorbs the impact of the two it does not: customer dynamics and external forces.

This is why the nature of the shock matters less than the ability to respond to it. It was not long ago that COVID imposed its own, as remote work and a shift to athleisure hit overnight. Those impacts stabilized and moved into the rearview mirror, and GLP-1s will too. New forces will follow, whether geopolitical conflict, continued disruption at the Strait of Hormuz, or textile-focused legislation, but nothing suggests the supply chain will stop running on its own time. The shocks are temporary while Fit Volatility is structural.

RECOMMENDATIONS

What to do.

In our unique experiences with clients, we have observed eight methods to get control over Fit Volatility. We present the following five.

01 Audit the fit details in product creation.

Is fit intent locked too early relative to closer-to-market insights? How often are master fit blocks updated? How well do today's fit models represent the ideal buyer? These questions matter whether or not the ideal buyer maps to GLP-1 demographics. Updating size curves helps, but only for inventory planning and demand-side issues.

02 Make fit sessions mandatory before proto review.

Product development, design, and merchants should assess the feasibility of rework and make the necessary adjustments to how a garment should fit before the final prototype is created. Having all teams in the room informs the merchant in real time, allowing vendors to meet proto sampling deadlines and eliminating rush-commit orders or airing of goods due to tight production timelines.

03 Close the customer feedback loop.

In apparel, spreadsheets are where customer insights go to die. Marketing and loyalty must feed insights to product creation with near-zero lead time, and standardized return reason codes keep feedback from fragmenting or getting lost in translation. The real challenge is figuring out how to incorporate feedback into seasonal development when multiple seasons are in flight simultaneously.

04 Deploy process innovation.

Run a multi-track calendar so repeatable items move faster; not every product needs the same timeline. Use existing samples, material libraries, and digital tools to expedite core and basic styles, then apply fast-tracks or postponement to respond to demand signals. Ironically, process innovation is how Eli Lilly brought Mounjaro, now the world's best-selling medication, to market fast enough to rival Novo's Ozempic.

05 Move past transactional vendor relationships.

Low-cost sourcing is the root cause of apparel's major inefficiencies. Brands that forge true partnerships with their vendors gain an edge. Shared risk and interdependence matter more than ever, and top vendors have capabilities that can help. More often than not, new processes in areas like pre-positioning of fabric demand new approaches to vendor relationships.

The shocks are temporary. The structure is not.

GLP-1s did not create Fit Volatility. They have simply exposed it, applying sufficient stress to a structural gap to make it impossible to ignore. And the gap is largely of the industry's own making, rooted in how the supply chain runs and how brands work inside their own walls.

Fit Volatility is structural, which means it can be addressed. We have made recommendations to help retailers and brands get control over this form of volatility. Some can be implemented immediately, with very little effort. Others require real investment but pay dividends over the long haul, because there will always be a next force, and the brands that build the capability now will absorb it when it comes.

With these approaches, you no longer have to throw a fit about fit.

ABOUT

Retail Strategy Group

Retail Strategy Group partners with retailers and brands to maximize profit: improving process, elevating performance, and driving profitability from the corporate office to the shop floor.

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