

# CONSUMERS SPEAK:

## APPAREL CHANGES THAT IMPACT SATISFACTION



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CONSUMERS **SPEAK**/  
APPAREL CHANGES  
THAT IMPACT  
**SATISFACTION**





# CONSUMERS SPEAK / APPAREL CHANGES THAT IMPACT SATISFACTION

**COMPETITIVE ENVIRONMENT**  
WHY APPAREL IS LOSING ITS  
COMPETITIVE EDGE

**CUSTOMER COMPLAINTS**  
DISSATISFACTION UNCOVERED  
AND ISSUES BY SPECIFIC  
PRODUCTS

**RECOVERING SATISFACTION**  
STRATEGIES TO IMPROVE  
SATISFACTION



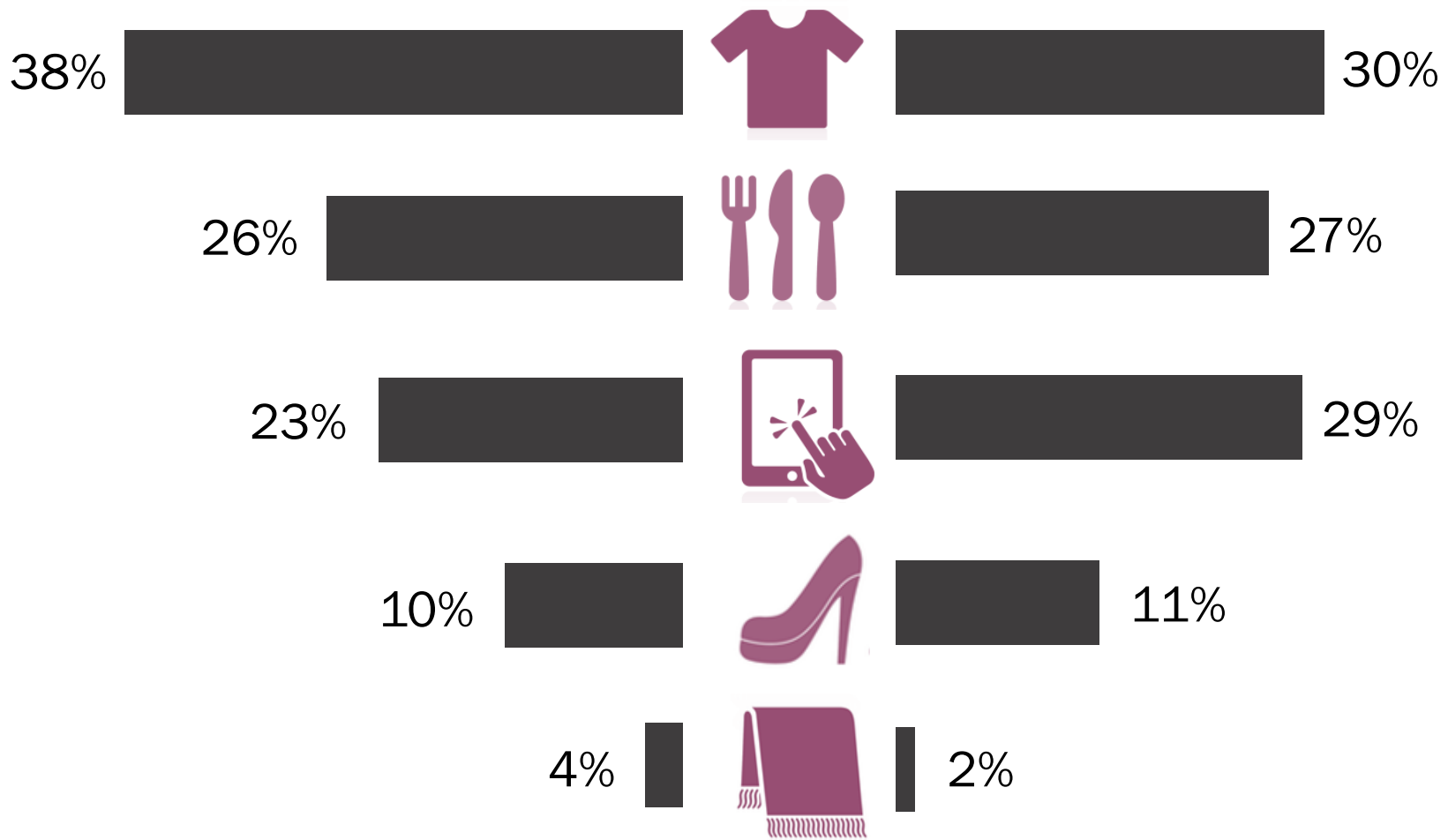
# INDUSTRY CHALLENGES



APPAREL LOSING ITS COMPETITIVE  
ADVANTAGE

# APPAREL IS LOSING ITS COMPETITIVE EDGE

ITEM OF CHOICE TO SHOP FOR... 2003 VERSUS 2013



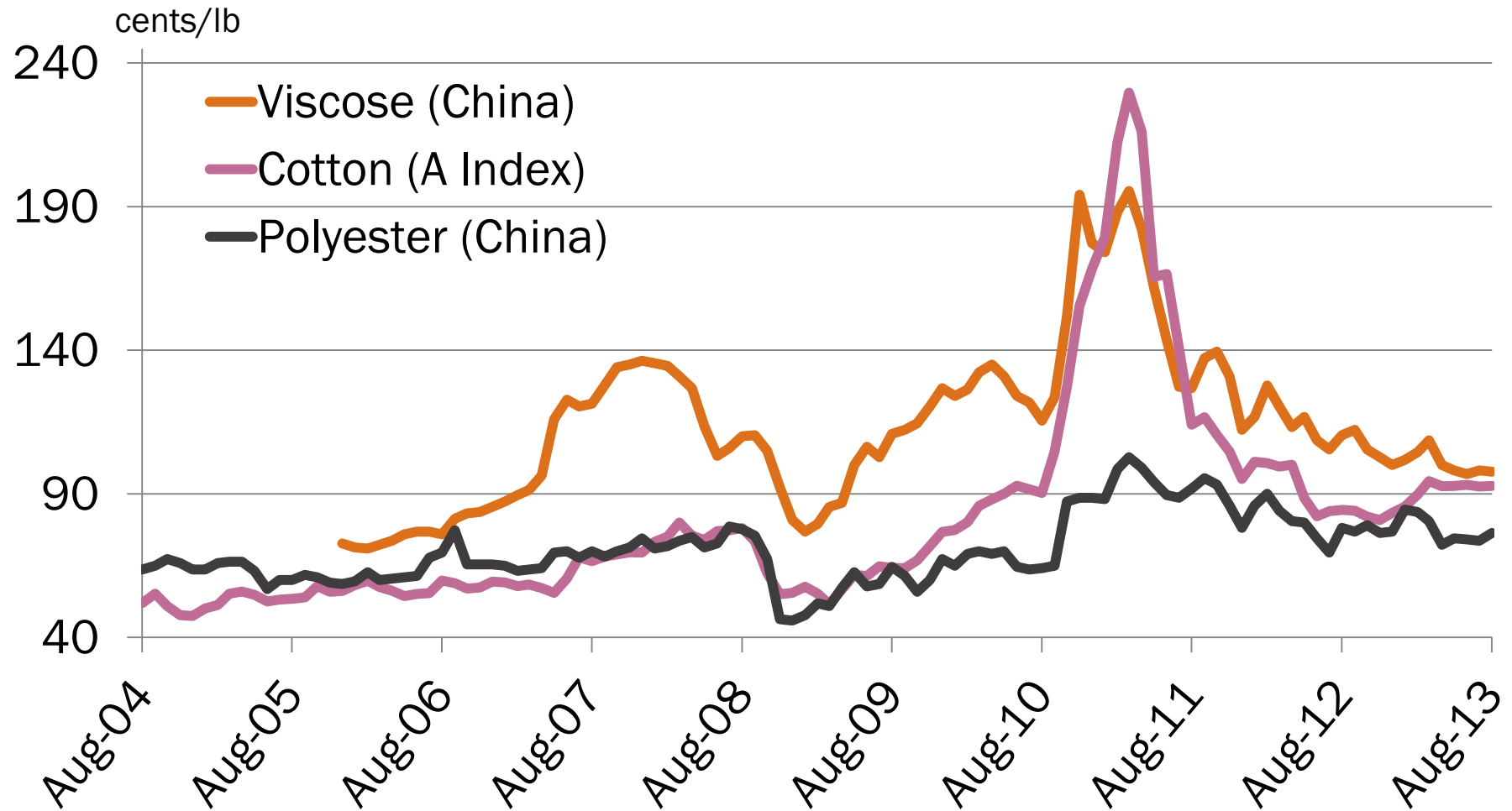
# INDUSTRY CHALLENGES



- APPAREL LOSING ITS COMPETITIVE ADVANTAGE
- COTTON PRICES WERE HISTORICALLY HIGH



# COTTON PRICES COMPETITIVE AGAIN



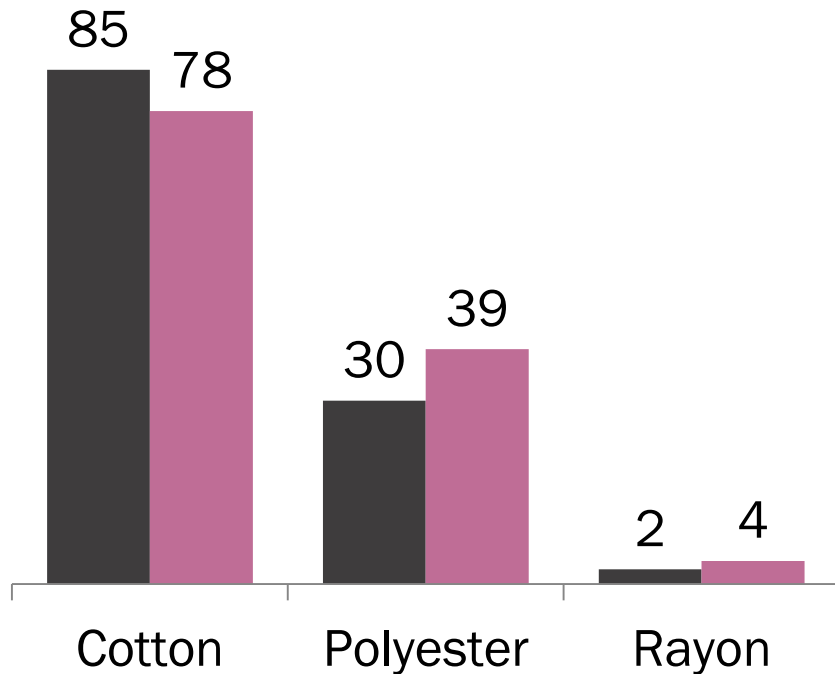
# INDUSTRY CHALLENGES



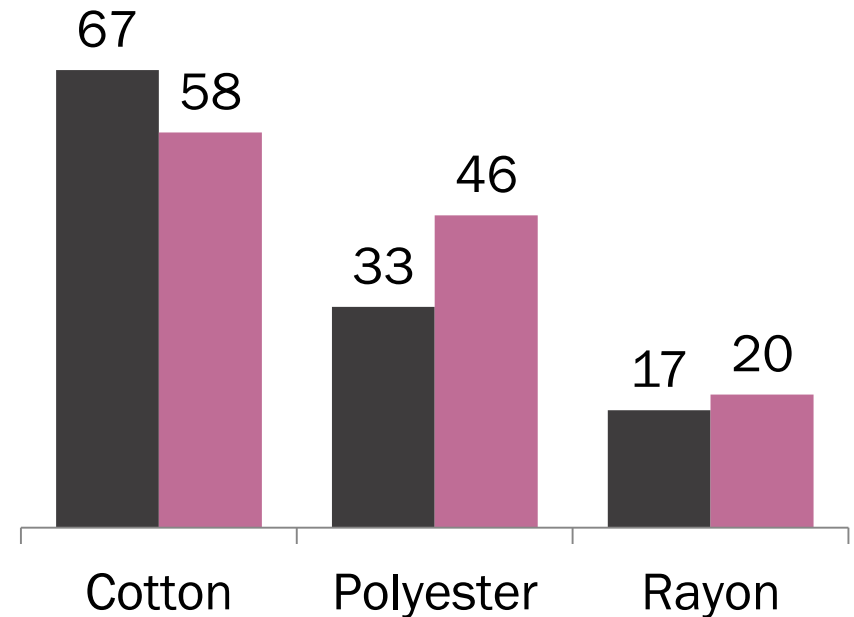
- APPAREL LOSING ITS COMPETITIVE ADVANTAGE
- COTTON PRICES WERE HISTORICALLY HIGH
- APPAREL PRICES INCREASED THE FIRST TIME IN 20 YEARS
- INDUSTRY PURSUED COST CUTTING MEASURES

# SHIFTS IN FIBER DISTRIBUTION AT KEY U.S. RETAILERS

Percent of Menswear Containing the Following Fibers



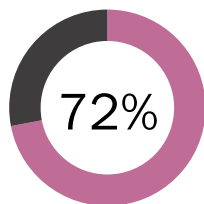
Percent of Womenswear Containing the Following Fibers



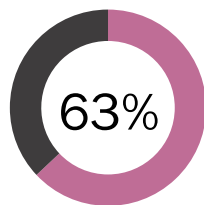
■ Year-Ending Quarter 2 2011

■ Year-Ending Quarter 2 2013

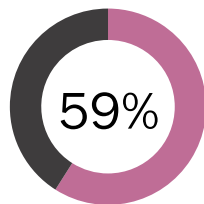
# U.S. CONSUMERS ARE PAYING MORE & GETTING LESS



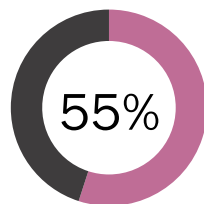
INCREASED PRICES



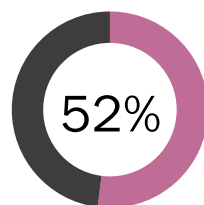
THINNER FABRICS



DECLINING DURABILITY



FIBER SUBSTITUTION



DECLINING QUALITY

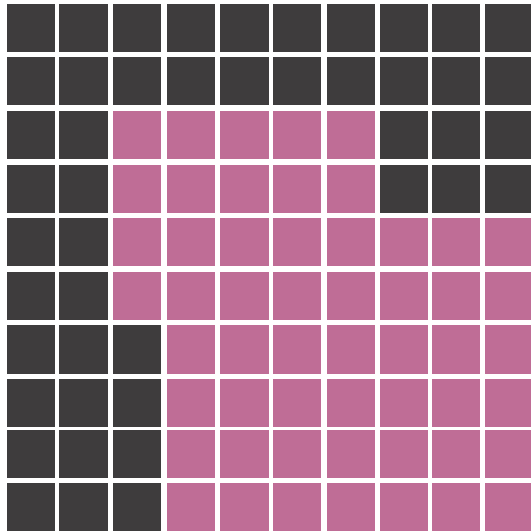


# GLOBAL SHOPPERS DISSATISFIED WITH FIBER SUBSTITUTION

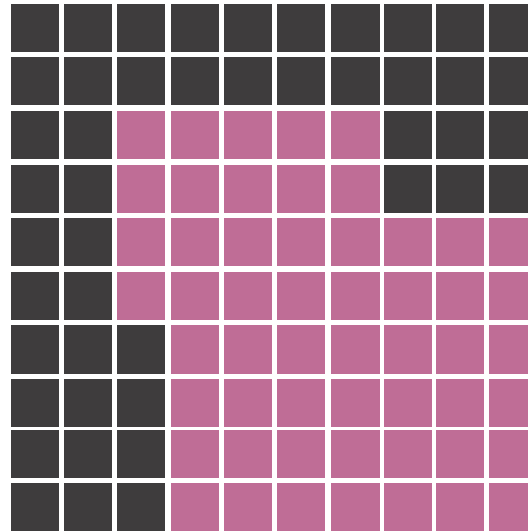




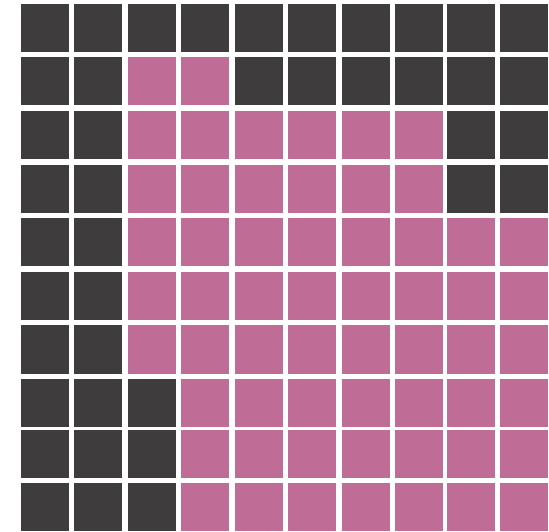
# GLOBAL SHOPPERS DISSATISFIED WITH FIBER SUBSTITUTION



OVER HALF (54%)  
NOTICE FIBER  
SUBSTITUTION



OVER HALF (54%)  
BOTHERED BY FIBER  
SUBSTITUTION



NEARLY 6 IN 10 (59%)  
WILLING TO PAY MORE  
FOR COTTON

# U.S. CONSUMERS DISSATISFIED WITH FIBER SUBSTITUTION

**DENIM  
JEANS**

61%

**BATH  
TOWELS**

61%

**UNDERWEAR**

60%

**BED  
SHEETS**

60%

**T-SHIRTS**

59%

**SOCKS**

53%

**SWEAT-  
SHIRTS**

51%

**DRESSES**

47%



## CONSUMERS WILLING TO PAY MORE FOR COTTON

	AVERAGE PRICE PAID	AVERAGE PRICE WILLING TO PAY	AMOUNT <u>MORE</u> WILLING TO PAY
DENIM JEANS	\$30	\$39	+\$9
DRESS	\$32	\$39	+\$7
SWEATSHIRT	\$24	\$31	+\$7
DRESS SHIRT	\$25	\$31	+\$6
CASUAL PANTS	\$26	\$32	+\$6
SKIRT	\$19	\$23	+\$4
T-SHIRT	\$12	\$16	+\$4
BATH TOWEL	\$9	\$12	+\$3
UNDERWEAR	\$7	\$9	+\$2

# CUSTOMER DISSATISFACTION WITH DENIM JEANS

**PRODUCT:** Women's Denim Jeans **PRICE:** \$40

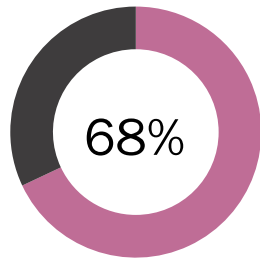
**FIBER CONTENT:** 80% Cotton/19% Polyester/1% Lycra

"I bought a new pair about three months ago, and **they are not the same**. The fabric is lousy. It's **now a poly cotton blend**, and it **doesn't hold its shape**, it **wears through in the inner thigh quickly** and you can't patch it because the **fabric is too thin**. Really upset and disappointed in [**Retailer**]. It used to be the perfect jean and the only one that I could find that fit my body shape just right, Now I don't know what I am going to do because **I don't want to keep spending money on jeans that won't last but a couple months!!**. **Please reconsider your choice in material and bring back the old and quit trying to be cheap with things and listen to your customers, the ones that are keeping you in business. I see I am not the only one having issues with this!!!**"

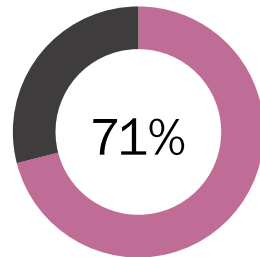
*- Customer Review, Specialty Store, posted February 2012*



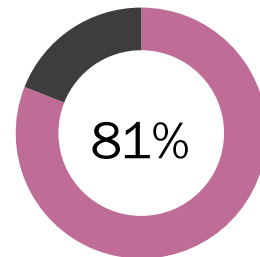
# IMPACT OF CUSTOMER COMMENTS ON APPAREL PURCHASES



WRITE PRODUCT REVIEWS FOR CLOTHES



CLOTHING REVIEWS ARE INFLUENTIAL



CLOTHING REVIEWS ARE BELIEVABLE



# COTTON INCORPORATED'S CUSTOMER COMMENT PROJECT

- Collection of over 260,000 customer comments available on 25 key retailer websites
- Over 30,000 jeans, pants, dresses, knit and woven tops, athleticwear, and home textiles collected
- Information collected includes price, fabrication, fiber, features, origin, comment, rating, etc.



# WHAT AREAS ARE CONSUMERS DISSATISFIED WITH?

General Anger



Feeling Misled



Return or  
Exchange Issues



Performance or Textile  
Issues

Disappointment



Size or Fit  
Issues



Value or  
Supply Issues



# CLOTHING ISSUES IDENTIFIED AT 3 MAIN STAGES



What are the main performance issues at each stage?

# PERFORMANCE ISSUES BY STAGE REQUIRE TARGETED SOLUTIONS

## PURCHASE

- ✓ Odor
- ✓ Quality
- ✓ Wrinkling



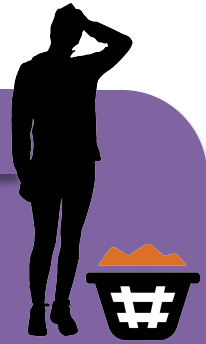
## WEAR

- ✓ Itching
- ✓ Odor
- ✓ Pilling
- ✓ Snagging
- ✓ Static Cling
- ✓ Stretch - Recovery
- ✓ Wear & Tear
- ✓ Wrinkling
- ✓ Fading



## CARE

- ✓ Fading
- ✓ Odor
- ✓ Pilling
- ✓ Shrinking
- ✓ Stretch-Recovery
- ✓ Wear & Tear
- ✓ Wrinkling



# CUSTOMER COMPLAINTS BY PRODUCT CATEGORY



DENIM JEANS



PANTS



KNIT TOPS



WOVEN TOPS



DRESSES



ATHLETICWEAR

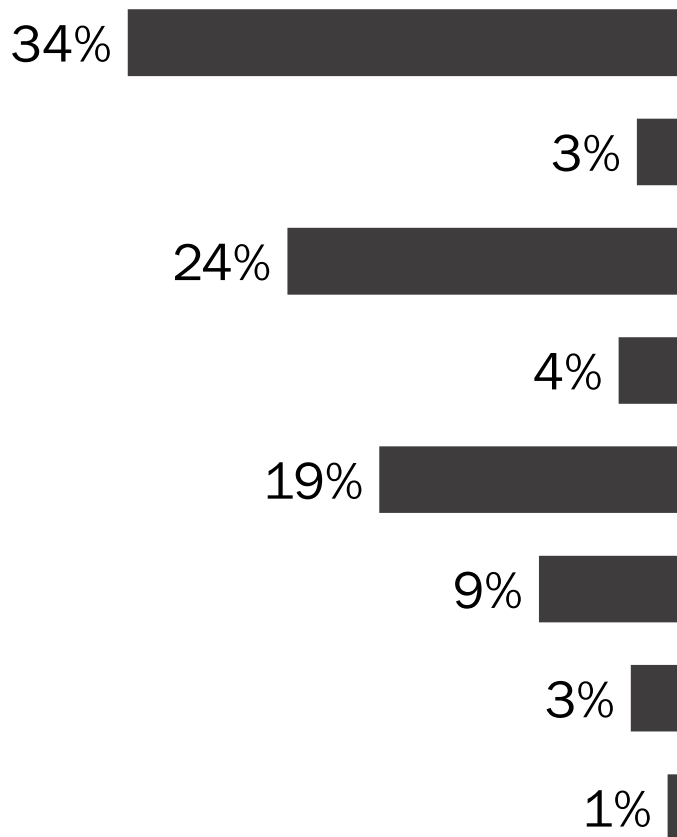


HOME TEXTILES

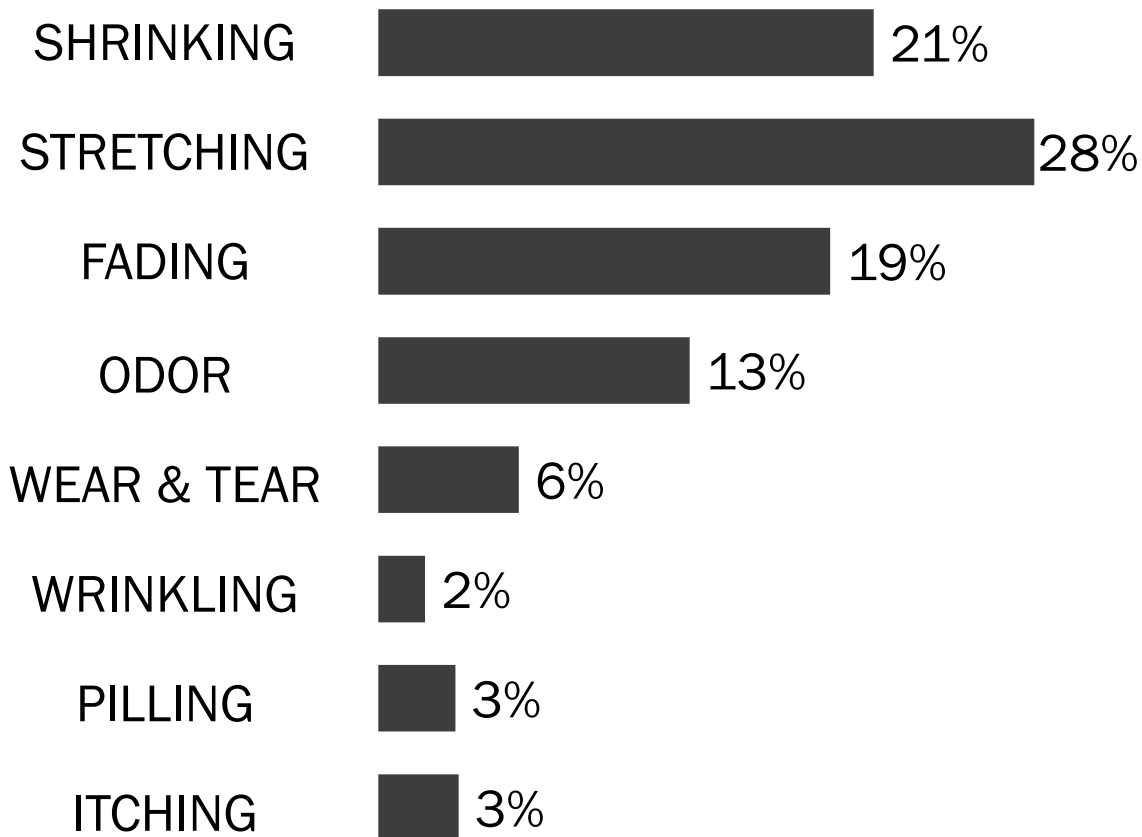


# PERFORMANCE ISSUES IN DENIM JEANS

## MEN'S DENIM JEANS



## WOMEN'S DENIM JEANS



# DISSATISFACTION WITH STRETCH RECOVERY IN JEANS

**PRODUCT:** Women's Denim Jeans **PRICE:** \$40

**FIBER CONTENT:** 88% Cotton/10% Polyester/2% Spandex

I'm thinking of writing a real letter on paper to express my disappointment in these jeans... I washed and dried them as directed, put them on feeling really good and Within An Hour they had stretched out to ridiculous proportions. I could take them off and put them back on without undoing the fly! They were HUGE and Baggy and I felt like a Rodeo Clown by the end of the day... I won't be buying any more until they return to 100% cotton. I would return them if I could but because they fooled me out of the package I doubt I'll get my money back. I'll send them back anyway. I can't possibly wear them.

- Customer Review, Specialty Store, posted March 2012



# DISSATISFACTION WITH FADING IN DENIM JEANS

**PRODUCT:** Women's Denim Jeans **PRICE:** \$22

**FIBER CONTENT:** Cotton/Spandex

"I like the fit, the only thing I would say detrimental is that these and all jeans I buy now, fade out too quick, a few washings and they look old..I've been buying these for years, I have been satisfied with them."

- Customer Review, Mass Merchant, posted June 2012



**PRODUCT:** Women's Denim Jeans **PRICE:** \$33

**FIBER CONTENT:** Cotton/Polyester

Don't get the dark color because it fades onto your hands after several washes. Mine have been washed 6 times.

- Customer Review, Chain Store, posted Nov 2012



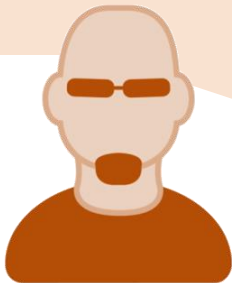
# DISSATISFACTION WITH WEAR & TEAR IN JEANS

**PRODUCT:** Men's Denim Jeans **PRICE:** \$40.49

**FIBER CONTENT:** 100% Cotton

I have worn [brand] jeans for years. They have always been my go to jean in the past. But not anymore. [Brand] changed the fabric weight and quality of the jeans. The weigh is about half of what it used to be and the craftsmanship is poor at best. The back pockets are tearing and the belt loops are poorly sewn. There are snags in the denim and color issues. I used to be able to get at least a year or two out of each pair. The last two pairs I purchased in December 2010 are already torn and falling apart. The [brand] jeans I purchased last year are actually in better shape than the jeans I just got. Steer clear as the quality is very poor but the price is still just as high. Search for a better value for your money.

*- Customer Review, Online-Only Store, posted March 2011*



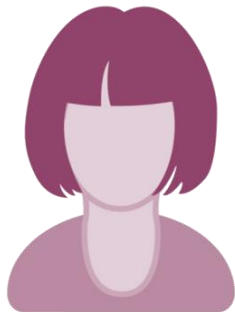
# DISSATISFACTION WITH ODOR IN JEANS

**PRODUCT:** Women's Denim Jeans **PRICE:** \$10.80

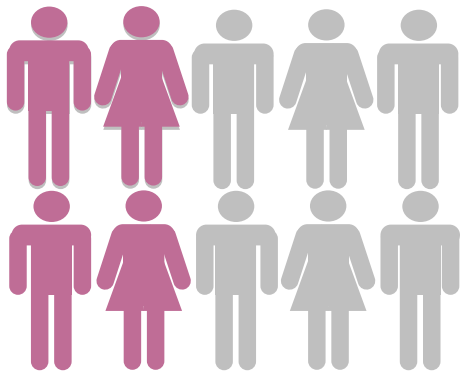
**FIBER CONTENT:** 68% Cotton/19% Polyester/12% Rayon/1% Spandex

I purchased, washed and then wore these jeans and kept wondering while I was in my car and on my way to work "what is that smell?" I was mortified when a coworker told me flat out you stink! Went out on my break and bought a pair of pants and threw the stinky jeans in the trash.

- Customer Review, Fast-Fashion Retailer, posted May 2012

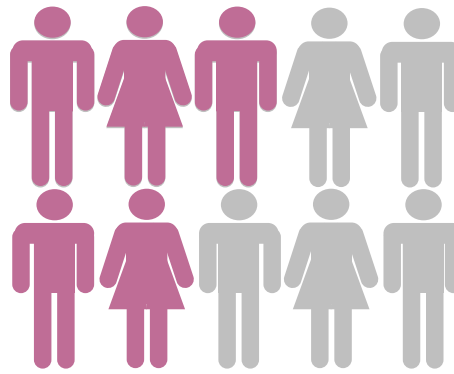


# DISSATISFACTION WITH JEAN PERFORMANCE ISSUES



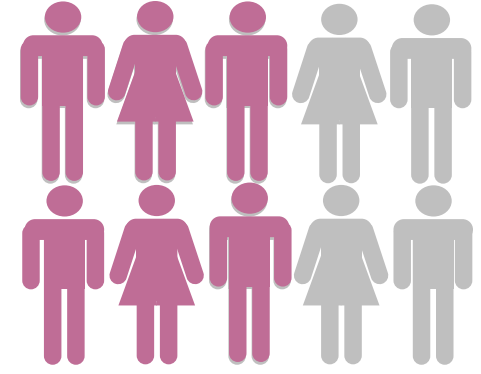
## 4 IN 10 DISSATISFIED

- Odor
- Stretch Recovery
- Wear & Tear
- Wrinkling
- Snagging



## 5 IN 10 DISSATISFIED

- Pilling
- Itching



## 6 IN 10 DISSATISFIED

- Fiber Substitution

# DISSATISFACTION WITH FIBER SUBSTITUTION IN JEANS

**PRODUCT:** Women's Denim Jeans **PRICE:** \$245

**FIBER CONTENT:** Tencel/Cotton/Elastane

[Brand] are both using Tencel/Lyocell in some of their jeans now. Read the labels & stay away from this fabric if at all possible. It is made of wood pulp. This fabric stretches more than Spandex & doesn't keep its shape. I bought my normal size & they stretched & wrinkled horribly. I will stay with a cotton/spandex combination from this point forward.

*- Customer Review, Luxury Department Store, posted February 2013*



# PERFORMANCE ISSUES IN ATHLETICWEAR

## TOTAL ATHLETICWEAR

24% Pilling

21% Snagging

14% Shrinking

10% Odor

## ATHLETIC PANTS

41% Pilling

18% Shrinking

7% Snagging

7% Stretching

## ATHLETIC TOPS

31% Snagging

14% Odor

12% Pilling

11% Shrinking



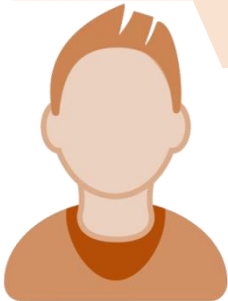
# DISSATISFACTION WITH PILLING IN ATHLETICWEAR

**PRODUCT:** Men's Athletic T-Shirt   **PRICE:** \$24.50

**FIBER CONTENT:** 100% Polyester

This is NOT the original shirt. I have original [brand] t's that are 5 years old, and they have never had pills or fuzz, they breathe better and are much neater in appearance. These shirts, which purport to replace the substandard recycled content shirts (which were sold with no indication that the shirt had changed, annoyingly) are fuzzy and have pilling BEFORE being worn. You can see the fuzz and pilling in the magnified view on the product page!!! I understand that products and vendors change but this time I feel defrauded, as the description explicitly says these are the old shirts, and they are not. There is no way this could be an honest mistake.

- Customer Review, Sports Specialty Store, posted December 2011



# DISSATISFACTION WITH ODOR IN ATHLETICWEAR

**PRODUCT:** Women's Odor Resistant Athletic T-Shirt    **PRICE:** \$58

**FIBER CONTENT:** 100% Polyester

I really loved this shirt... My complaint is that this shirt just smells so bad that I am uncomfortable wearing it around anyone. Its embarrassing, but honestly I am not even a sweaty person. It even makes the drawer in my closet smell after washing it. I have lots of [brand] shirts (some [brand] in different fabric), and have worn some for way longer that do not smell nearly as bad. I really don't understand how [retailer] can market this as anti stink.

*~ Customer Review, Sports Specialty Store, posted September 2011*



# DISSATISFACTION WITH SNAGGING IN ATHLETICWEAR

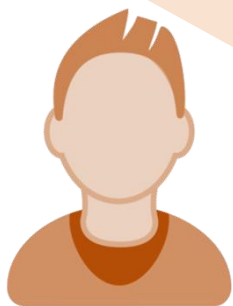
**PRODUCT:** Men's Athletic T-Shirt

**PRICE:** \$54.50

**FIBER CONTENT:** 100% Polyester

I own two of these and they **both snagged**, Very disappointed that this flaw wouldn't come out in the testing phases.

*~ Customer Review, Sports Specialty Store, posted October 2011*



**PRODUCT:** Women's Athletic T-Shirt

**PRICE:** \$58

**FIBER CONTENT:** Nylon/Spandex

First time I wore this it **snagged so easily**.. I was going to buy the long sleeve but glad I didn't.. pretty **expensive shirt for a one time use**.. **ruined my faith in [retailer]**.

*~ Customer Review, Sports Specialty Store, posted October 2012*



# IMPACT OF CUSTOMER COMMENTS ON APPAREL PURCHASES

## PERCENT VERY OR SOMEWHAT LIKELY TO REFRAIN FROM PURCHASING CLOTHING BECAUSE MULTIPLE REVIEWS SAY THE FOLLOWING

More than  
8 in 10

/completely **fell apart** after first laundering /**fell apart** within a few wearings

More than  
7 in 10

/holds body **odor** after laundering /**pilled** after the first few wearings /**shrank** after the first laundering

More than  
6 in 10

/had a chemical **odor** /**faded** after the first few launderings /**stretched out** after a few hours /not true to **size** /material is **thinner** than it used to be /it used to be better **quality** /it **clings** in all the wrong places /doesn't **fit** like it used to /easily **snags** on items

# MAJOR PERFORMANCE ISSUES BY 100% FIBER

## 100% COTTON

WEAR & TEAR  
SHRINKING  
FADING

## 100% POLYESTER

WEAR & TEAR  
SNAGGING  
ODOR  
STATIC CLING  
ITCHING

## 100% RAYON

WEAR & TEAR  
SHRINKING  
ODOR  
STATIC CLING  
WRINKLING

## 100% WOOL

ITCHING  
PILLING  
ODOR

# CONSUMERS DOUBT THE PERFORMANCE OF POLYESTER & RAYON

## WHICH TYPE OF CLOTHING IS...

	COTTON	POLYESTER	RAYON	COTTON/POLY BLEND
Most comfortable	69%	5%	8%	18%
Most breathable	68%	7%	10%	14%
Lasts the longest	51%	13%	11%	25%
Most versatile	46%	8%	13%	34%
Hardest to iron	24%	28%	40%	8%
Hardest to wash	19%	21%	50%	10%
Falls apart the most	19%	26%	44%	11%
Biggest odor issue	20%	34%	34%	11%
Safe for the Environment*	91%	51%	49%	N/A

\*Top-5 box on 11-point scale with 10 meaning, “Extremely Safe” and 0 mean “Extremely Harmful”



# RECOVERING CUSTOMER SATISFACTION

- SNAGGING, PILLING, ODOR – RETURN TO 100% COTTON OFFERINGS
- STRETCH RECOVERY – HEAT SET COTTON/SPANDEX BLENDS
- FADING – UTILIZE GOOD QUALITY DYES AND MANUFACTURING PROCESSES
- SHRINKING – PROPER TEXTILE PROCESSING DURING MANUFACTURING
- ENCOURAGE YOUR CUSTOMERS TO CHECK THE LABEL
- UTILIZE ADDITIONAL INSIGHTS FROM COMMENT RESEARCH & WEBSITE

[WWW.COTTONORNOTHING.COM](http://WWW.COTTONORNOTHING.COM)







CONSUMERS **SPEAK**/  
APPAREL CHANGES  
THAT IMPACT  
**SATISFACTION**





- *Question & Answer*

**PLEASE SUBMIT  
ANY FINAL  
QUESTIONS NOW.**



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## Click on COURSES

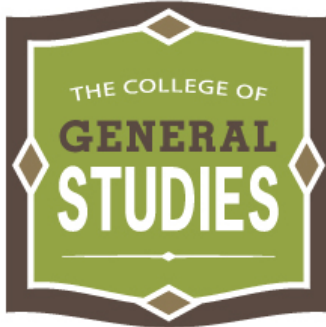
The screenshot shows the Cotton University website interface. At the top is a navigation bar with links: COTTON UNIVERSITY™, MY COTTON U, COLLEGES, COURSES, LIBRARY, INSTRUCTORS, PROJECTS, CONNECT, LOG OUT, and a search bar. The main header features the Cotton University logo and the text "Browse our COURSES". Below this, there are two main sections: "ONLINE COURSES" and "WORKSHOPS". The "ONLINE COURSES" section includes a button "SEE FULL ONLINE COURSE LIST" and a list of courses: "My Courses" (The Basics of Yarn Manufacturing, The Art of Weaving, The Art of Finishing, Linda DeFranco - Trend at Cotton Incorporated, Farm Tours 2012), "Recommended Courses" (Cotton Incorporated + Pratt Institute, Cotton Incorporated Overview, Cotton Incorporated's Knit FABRICAST™ fabric collection), and "Recommended Workshops" (Printing Science, Shade Matching and Reproduction, Dyeing and Finishing Science). The "WORKSHOPS" section includes a button "SEE FULL WORKSHOP LIST" and a list of workshops: "My Workshops" (You have not added any workshops), "Recommended Workshops" (Printing Science, Shade Matching and Reproduction, Dyeing and Finishing Science). The footer contains the Cotton University logo, links: ABOUT COTTON UNIVERSITY, CONTACT US, NEED HELP?, TERMS OF USE, PRIVACY POLICY, VISIT OUR CORPORATE SITE, and the text: AMERICA'S COTTON PRODUCERS AND IMPORTERS. Service Marks / Trademarks of Cotton Incorporated. © 2012 Cotton Incorporated.

- Webcast slides for download
- Research methodology
- Technical bulletins
  - Shrinkage
  - Color
- Additional Q&A



# Solving Performance Issues

Colleges at  
[CottonUniversity.org](http://CottonUniversity.org)





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