



Garment Quality: Understanding Pre-Purchase and Post-Purchase Perceptions

Apparel price deflation in the United States has been persistent since 1993—with prices declining in 9 of 11 years—and has created myriad challenges for retailers and manufacturers seeking to understand and meet consumers' expectations for product quality. Two key factors in understanding these expectations are (1) consumers' pre-purchase perceptions of quality, especially in relation to price, and (2) their attention to garment care instructions, which affects their satisfaction with product performance. Cotton Incorporated has been involved in research to answer these types of questions for more than a decade.

Consumers' perceptions of quality are ambiguous and hard to define—and they differ before and after purchase. Before buying a garment, consumers judge its quality by factors such as price, how well the garment is made, comfort, and brand. After buying and wearing an item, consumers focus more on how the garment wears, how well it launders, and its overall durability. An understanding of these differences between consumers' pre- and post-purchase perceptions of quality is a strategic tool for meeting their expectations.

Pre-Purchase: Quality vs. Cost?

Cotton Incorporated's Lifestyle Monitor™ has tracked a shift in consumers' perceptions of higher- and lower-priced clothing over the past five years. In 2000, 35% of consumers agreed that higher price meant better quality, 41% that

higher-priced clothes would last longer, and 45% that higher-priced clothes were more stylish, while 64% agreed that lower-priced clothes looked as good as higher-priced clothes. By 2004, the first three figures had declined significantly (to 31%, 35%, and 38%), while the percentage agreeing that lower-priced clothes looked as good as higher-priced clothes had risen to 68%. This shift in consumers' attitudes towards less-expensive apparel was accompanied by growth in the percentage of consumers willing to sacrifice quality for price, from 36% in 2000 to 43% in 2005.

Factors Important to Perceived Apparel Quality

Pre-Purchase

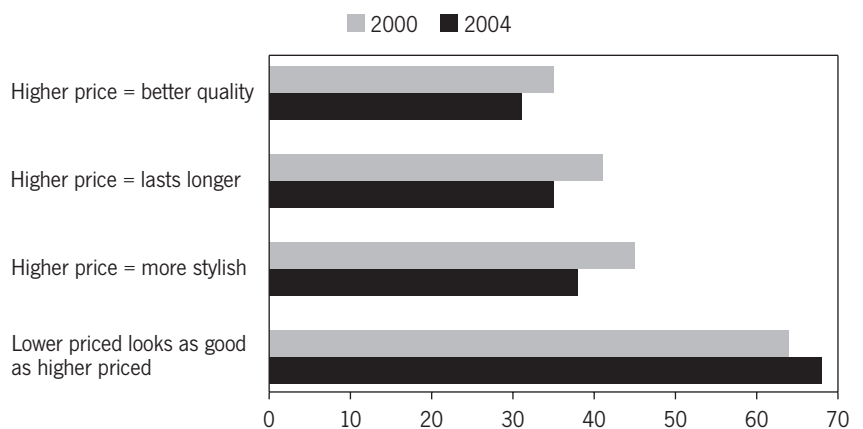
Price
Garment construction
Comfort
Brand

Post-Purchase

Wearability
Laundering performance
Durability
Price

Consistent with a weakening relationship between price and quality in consumers' minds, shoppers generally reported being fairly satisfied with the quality of apparel available at retail, regardless of where they shopped. When consumers were asked, "On a 10-point scale (with 10 being very satisfied and 1 being not at all satisfied), how satisfied are you with the quality of clothing available at retail?"

Higher- vs. Lower-Priced Clothes: Percent of Consumers Agreeing



Source: Cotton Incorporated's Lifestyle Monitor™.

the average score was 7.0, and the average differed by less than 1 point among the four primary retail channels — department stores, national chains, specialty stores, and mass merchants. This general satisfaction with quality across retail channels suggests that consumers will accept a lower level of quality in apparel if the price is right. The lack of variability in satisfaction indicates that retailers now operate within a narrow spectrum when trying to appeal to consumers on the basis of quality differences.

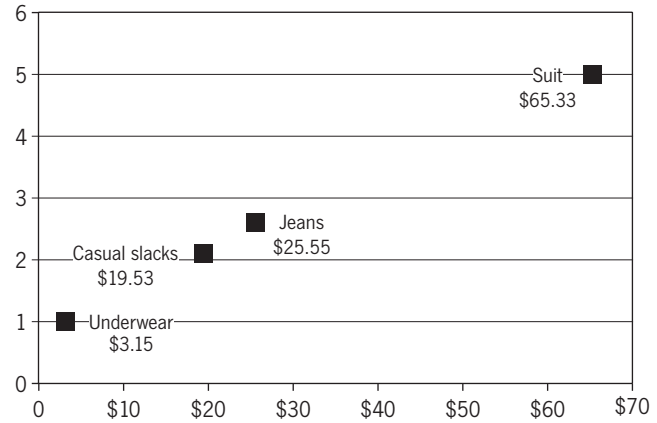
The last point of contact for a consumer before purchase is the sales staff. In a recent study conducted by Cotton Incorporated, staff from 27 retailers across the United States reported that the following attributes contributed to quality in consumers' minds: fit, style, branding, and price. An emerging phenomenon noted in this study is that of "fast fashion" or "disposable apparel." Shoppers are increasingly willing to trade quality for low prices in order to acquire items they intend to wear only a few times. A case study of a teen retailer illustrates this changing attitude towards quality. Even though the retail associates felt that the quality of their offerings had deteriorated over the past three years, clothing sales had climbed — largely because of consumers seeking "fast fashion." In addition, this retailer's staff had a high degree of product knowledge regarding style, features, and benefits, as well as corporate training to "sell" the customer, which helped offset pre-purchase perceptions of lower quality. The result was increased overall sales, despite declining quality and prices. However, one of the top reasons consumers returned apparel to this retailer was dissatisfaction with quality — supporting the notion that different factors affect pre- and post-purchase perceptions of quality.

Post-Purchase: Wear and Care

Even though a minority of consumers link price with quality, consumers' post-purchase satisfaction with apparel depends on the price paid and expectations for durability. In turn, the durability they expect from a garment depends on the specific product, price paid, and intended use. Among select product categories, a garment's expected durability (in years) was positively correlated with the average price paid. Of the four product categories analyzed, suiting commanded the highest average price, and

consumers generally expected a suit to last five years. Similarly, consumers paid the least for underwear and expected it to last the shortest time.

Expected Garment Life (Years), by Price Paid



Source: Cotton Incorporated's Lifestyle Monitor™ and NPD Fashionworld.

Laundering performance also influences how consumers judge quality. Data from the Lifestyle Monitor indicate that consumers' expectations for color fastness are significantly higher than the current standards manufacturers use to measure product performance. The standard AATCC test for color fastness requires five launderings to test for a color change. However, consumers expect a pair of black pants to be washed an average of 11 times before fading, and sheets to be laundered 13 times—twice the washings required by the current standards.

A recent analysis by technical experts in the Cotton Incorporated research laboratories found a wide range of color fastness diversity at retail. The results indicated that a significant percentage of products on the shelves do not meet the current testing standards for color retention. Of 16 different pairs (brands) of casual slacks tested for color fastness, only 5 retained at least 90% of their color after 10 washings. This wide variability in product performance makes it hard for consumers to know what to expect from any given garment. The resulting consumer confusion about durability standards explains why, for example, 87% of consumers hold the retailer or manufacturer responsible if a shirt falls apart after being washed. Performance variability presents an opportunity for retailers and manufacturers—for example, if their product can withstand more than 15 launderings without a color

change, they can highlight this feature in marketing the product to consumers.

Laundering knowledge and routines vary greatly among consumers. Consumers often clean their clothing in ways inconsistent with product labeling, and the resulting problems with product performance directly affect consumers' perceptions of quality. Cotton Incorporated conducted ethnographic (in-home) research across the United States to find out how consumers launder their clothes. Laundering methods inconsistent with instructions included, among others, not reading garment care labels, not reading instructions for use of the laundry detergent, not using the right amount of detergent, loading the washing machine incorrectly, and not using the right water temperature setting.

The ethnographic research is supported by data from the Lifestyle Monitor indicating that 49% of consumers rarely or never change the water temperature setting on the washing machine. Surprisingly, whether consumers changed water temperature settings did not depend on age, but was more a matter of habit. If potentially half of consumers wash clothing at the wrong temperature, the resulting color loss or shrinkage and dissatisfac-

Inconsistencies in Fabric Care and Laundry Routines Reported by Consumers

- "Now that I think about it, I don't think I've ever read the back of the bottle."
- "I never pretreat."
- "I always pretreat."
- "Soap first, then water, then clothes."
- "Clothes first, then soap, then water."
- "Water first, then soap, then clothes, then more soap."

Source: sterling group.



- "Always fill to the top of the rim. That means it will be more clean."
- "Fill all the way? Never. That's just the manufacturer trying to get you to use more."
- "Hot is best. It kills germs."
- "Cold is best for everything, I think."
- "High? Never. I always use the lowest setting."

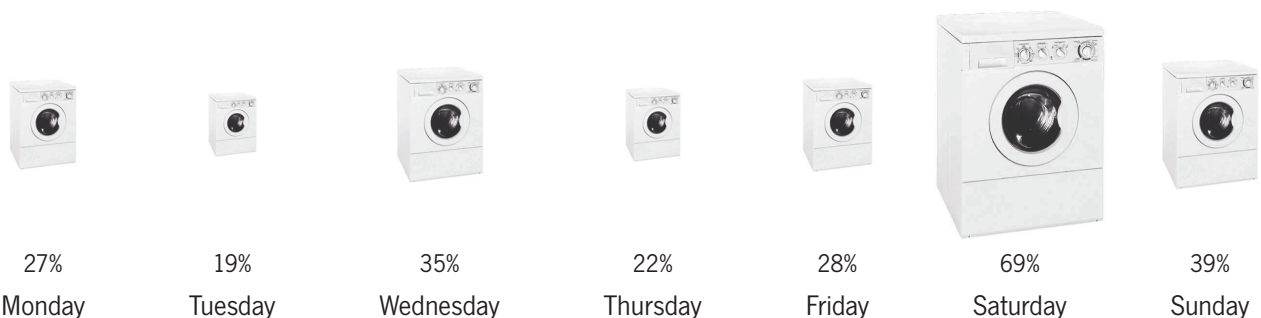
- "High dry gets it done faster."

tion with the product can affect their perceptions of quality.

Although consumers vary in how they launder their clothes, the timing at which they choose to launder is fairly consistent. On average, consumers said they washed clothes three days a week, with women doing laundry more often than men. The most popular laundry day was Saturday (69%), followed by Sunday (39%) and Wednesday (35%). Only 19% of consumers said they did laundry on Tuesday.

Another laundry routine that varies among consumers is checking garment care labels, according to data from the Lifestyle Monitor. When asked

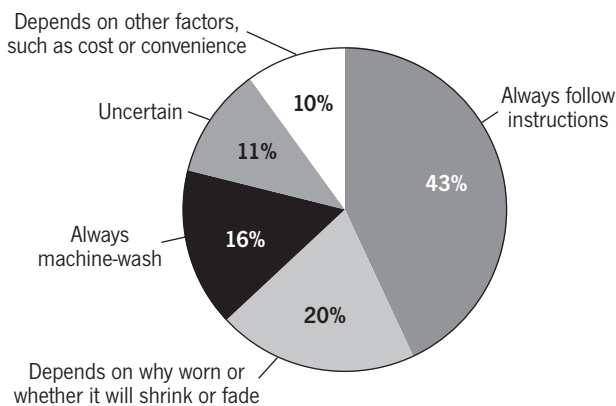
Percent of Consumers Who Do Their Laundry on Each Day of the Week



Source: Cotton Incorporated's Lifestyle Monitor™.

whether they were more likely to check the garment care label before they bought an item or after they had worn it, 47% said they waited until after they had worn it—behavior that has not changed significantly in over a decade. When it came time to clean the garment, 43% said they followed the instructions regarding hand- or machine-washing, while 20% said it depended on why the garment was worn or whether it might fade or shrink; 16% always machine washed regardless of the instructions, 10% gave other reasons for choosing a cleaning method,

How Consumers Decide Whether to Machine-Wash or Hand-Wash a Garment (% Responding)



Source: Cotton Incorporated's Lifestyle Monitor™.

such as cost or convenience, and the remaining 11% were uncertain as to how they determined cleaning methods. These results suggest that for many consumers, convenience and accommodating personal schedules are higher priorities than following laundering instructions.

Most consumers (70%) said their mothers had taught them how to do laundry, but many were still learning by trial and error. In accordance with Cotton Incorporated's Lifestage Theory (which relates life experiences at different ages to attitudes and behaviors concerning apparel), consumers entering early adulthood (aged 19 to 24) were the most likely to use trial and error in laundering clothes, as they moved out and established their own routines. The percentage who wanted to know laundry instructions before buying a garment rose from 25% of consumers aged 16 to 18 to 38% of those aged 19 to 24, a 13-point increase.

Based on Cotton Incorporated's research on consumers' perceptions of apparel quality and the potential impact of improper laundering on perceived garment quality, it would behoove the industry to explore ways to help consumers understand what care techniques — such as checking labels for care instructions — will help keep their apparel in good shape for a longer time.

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