## **RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING**

# THE POWER OF CONSUMER



Recognize the implications, influence, and operational value of online customer feedback to win consumer confidence. bolster loyalty, and secure apparel spending dollars...

The number of consumers who write online reviews and the percent of consumers who find these reviews influential has increased significantly over the past few years.







Look for additional reports on Cotton Incorporated's groundbreaking Customer Comments research for intelligence on apparel issues and tactical recommendations.

### Sources:

- Cotton Incorporated's Lifestyle Monitor™ survey
- Cotton Incorporated's Customer Comments Research
- Forrester Research¹



Places where consumers read apparel reviews online:

71%

**45%** 

**17%** 







8%

Retailer\brand E-commerce sites

sites

Social media sites

Blogs

Write product reviews for clothing they have purchased either in-store or online



Say that product reviews are influential when shopping for clothing online



Say that product reviews for clothing written online are believable

Cotton Incorporated's analysis of nearly 200,000 customer reviews of apparel items has uncovered significant

Customer Review (Apparel Specialty Store, Posted January 2013)





COTTON INCORPORATED SUPPLY CHAIN



## **RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING**

The boundary between in-store and online apparel shopping is vanishing in the minds of consumers.

Offering a seamless or "OMNI-CHANNEL" shopping experience across all avenues that consumers buy and browse for clothing can help protect a retailer's or brand's competitive advantage.



experience.

more frequent.

The use of online and mobile

devices has transformed the

consumer's apparel shopping

Developing unified retail

strategies and offerings on

website, mobile, and email/social

clothes shopping experience and

media channels can enrich the

consumer online and in-store

make purchasing easier and

Incorporated

of apparel sales will be influenced by online sources by 2016.1

# **U.S. APPAREL SHOPPERS**

use the Internet to...

Compare prices (77%)



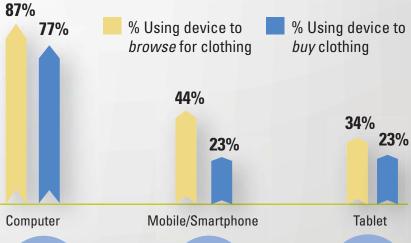
Look-up Coupons (71%)

...Before purchasing apparel in-store



# **ONLINE APPAREL SHOPPING BEHAVIORS**

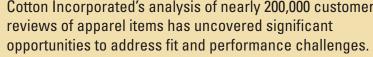
# Apparel shopping habits by device











**PRODUCT: Women's Denim Jeans** 

FIBER CONTENT: 72%Cotton/13% Polyester/13% Rayon/2% Spandex

I am very disappointed in these jeans. For \$99 I thought I was going to get jeans I would fall in love with. They stretch out and are baggy so quickly. The waist also stretches so much, I have to constantly pull them up. The back of the waist dips down so low, you need to wear a long top so underwear does not show when you bend over. After washing, the hem rolls up and even after pressing it down, it still rolls. I will be very hesitant to buy jeans from [this retailer] again.







## **RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING**

# **ONLINE APPAREL SHOPPING** BEHAVIORS (cont.)



Where do consumers start shopping for clothing online?



Capitalize on the growing response of apparel shoppers to direct digital marketing efforts...

\*Compared to 2010, significantly more consumers say they typically start shopping for clothing online using retailer/brand emails (33%, up from 26%) and social media sites (9%, up from 3%).

Significantly less shoppers use retailer/brand websites (58%, down from 64%) to start clothes shopping online.

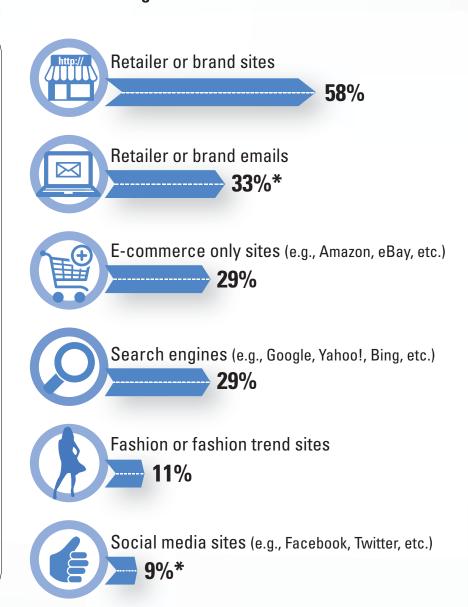




### **RETAILER AND BRAND** LOYALTY More than 3 out of 4

consumers tend to shop at brands and retailers they know and trust, when shopping for clothes online.





# **ONLINE SHOPPING CONCERNS** AND CONSIDERATIONS

Improve ease and satisfaction among apparel shoppers by addressing online shopping concerns and providing transparency and consistency of information across all retail touch-points...

To minimize tactile concerns, provide consumers with the "detailed" product information (e.g., sizing, color, fit, fiber content, etc.) that they say is important in their ultimate decision to purchase apparel.









### **FACTORS INFLUENCING ONLINE PURCHASES**

Consumers say that these informational details are influential in their ultimate decision to purchase an item of clothing online:

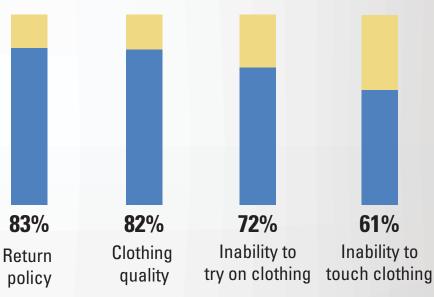
# Top concerns when shopping online for clothing



More than 8 out of 10 consumers are very or somewhat concerned about shipping costs, return policies, and clothing quality when shopping online.

### **Tactile concerns continue to hamper online sales**

% of consumers who say they are concerned about the following issues when shopping for clothes online:







fiber content fit information environmental footprint SIZING product views and close-ups multiple colors cleaning requirements performance features customer reviews

