



Specialist retailers' questionnaire: textile quality marks

Jörg Meding, BBE RETAIL EXPERTS

20 February 2008

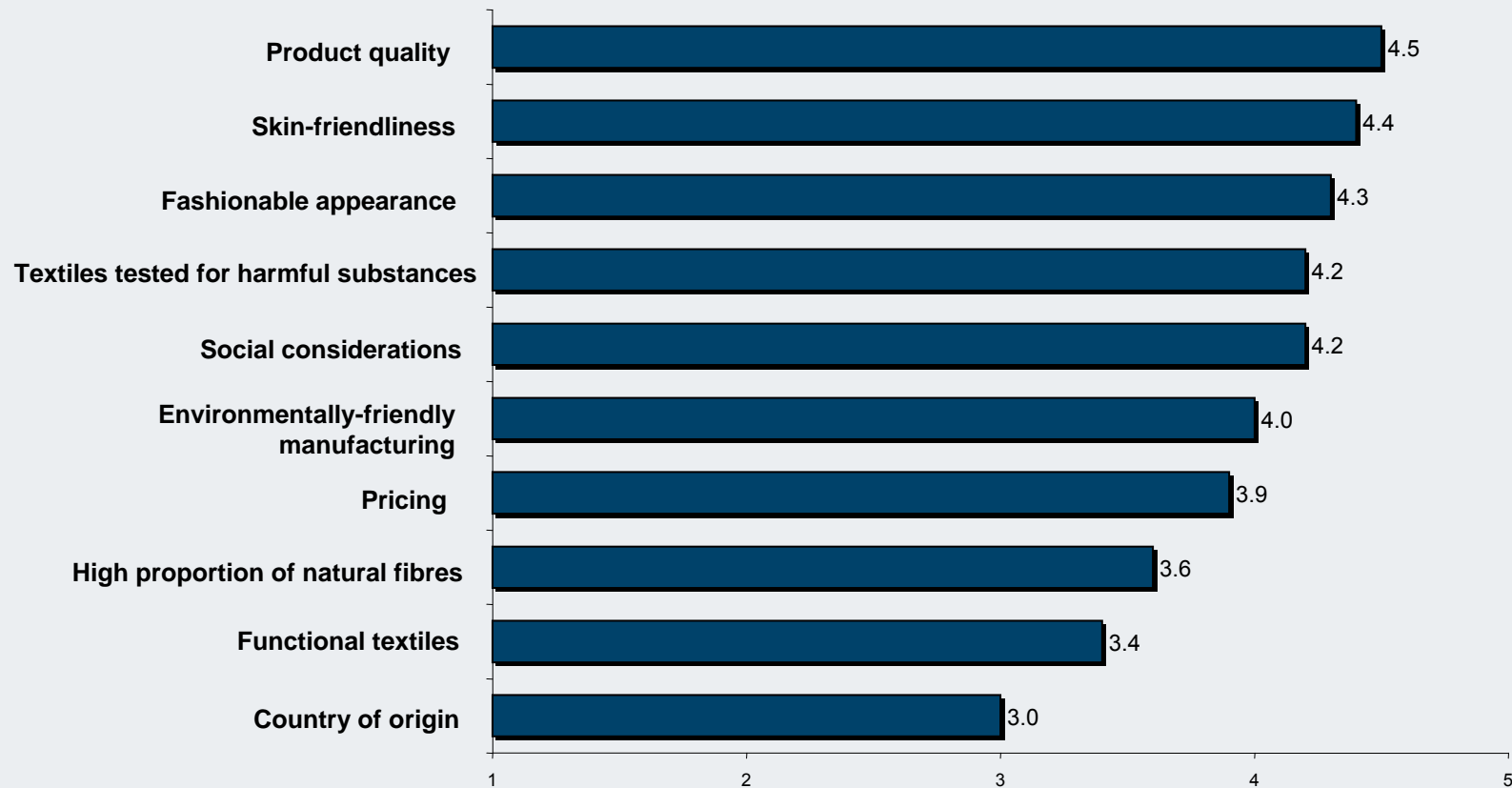
*By order of the
German Certification Centre
Oeko-Tex*

1 TASK, METHODOLOGY

- In January 2008, the BBE Retail Experts Unternehmensberatung GmbH & Co. KG received instructions from the German certification centre Oeko-Tex GmbH to carry out a market research survey.
- The aim of the survey was to find out to what extent the textile and quality marks that are available on the market are well-known and/or widespread in the clothing and textiles sector. The idea was also to find out to what extent certain textile quality marks have been accepted and whether they play a significant role for the target group of specialist retailers in their day-to-day selling and advising.
- The retailers' questionnaire finished with some questions about how they obtained information and how well-informed this target group of retailers is.
- To obtain the required information, a pre-prepared questionnaire was used to conduct 205 interviews with various groups of visitors to the Düsseldorf CPD show – an international trade fair for womenswear and accessories. The interviews took place from 10 –12.2.2008 and were conducted by two interviewers in the entrance area to the trade fair.
- The questionnaire consisted of a total of seven questions on the subject (closed and open) and four questions for the statistics.
- The people questioned were very willing to provide information and only a very few failed to complete the interview. A total of 205 completed interviews were taken into account in the evaluation which followed.

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

IMPORTANT ISSUES WHEN BUYING CLOTHING AND TEXTILES



Source: BBE RETAIL EXPERTS; scale from 1=unimportant to 5=very important

IMPORTANT ISSUES WHEN BUYING CLOTHING AND TEXTILES

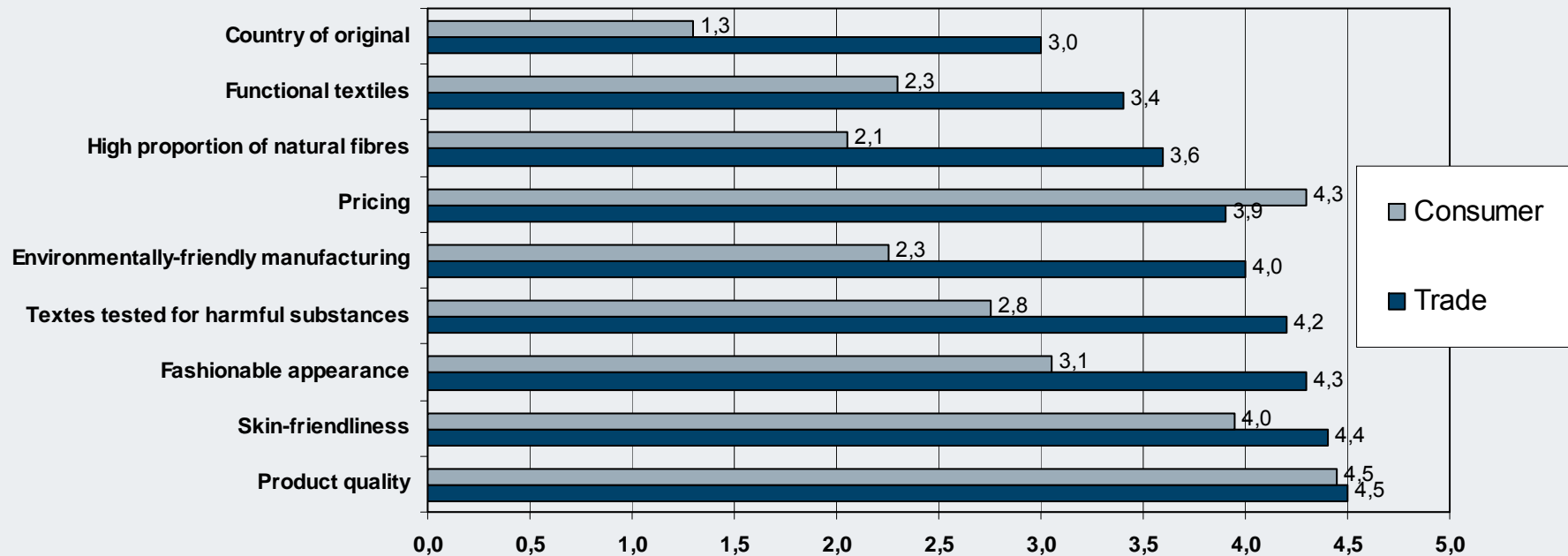
- Among the most important issues when buying clothing and textiles are the criteria of product quality, skin-friendliness, fashionable appearance, tests for harmful substances and social considerations.
- On a scale from 5=very important to 1=not important, these factors were rated between 4.5 and 4.2. While the question of skin-friendliness and whether textiles have been tested for harmful substances reflect a sensitivity among users and wearers of textiles that has been heightened for some time, the critical concern about the conditions behind the manufacturing process (child labour, starvation wages, working conditions) is also becoming an important subject which must be taken into account by players in the market.
At the same time, the country of origin is of barely any importance (3.0) – it is only important that the manufacturing conditions are right.
- Environmentally-friendly production is also ranked higher, at 4,0, than the price factor (3,9).
- In addition to the factors referred to above, those questioned also mentioned the following issues which were important to them when buying: stylish design/product originality, a good fit, expert advice/confidence in the retailer, easy-care/comfortable material and appropriate discounts for bulk buying.

Quelle: **BBE** RETAIL EXPERTS



2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

IMPORTANT ISSUES WHEN BUYING CLOTHING AND TEXTILES



1=not important - 5=very important
Source Consumers: GfK Gruppe, 2006, n=1.046
Source Trade: BBE RETAIL EXPERTS, 2008, n=205

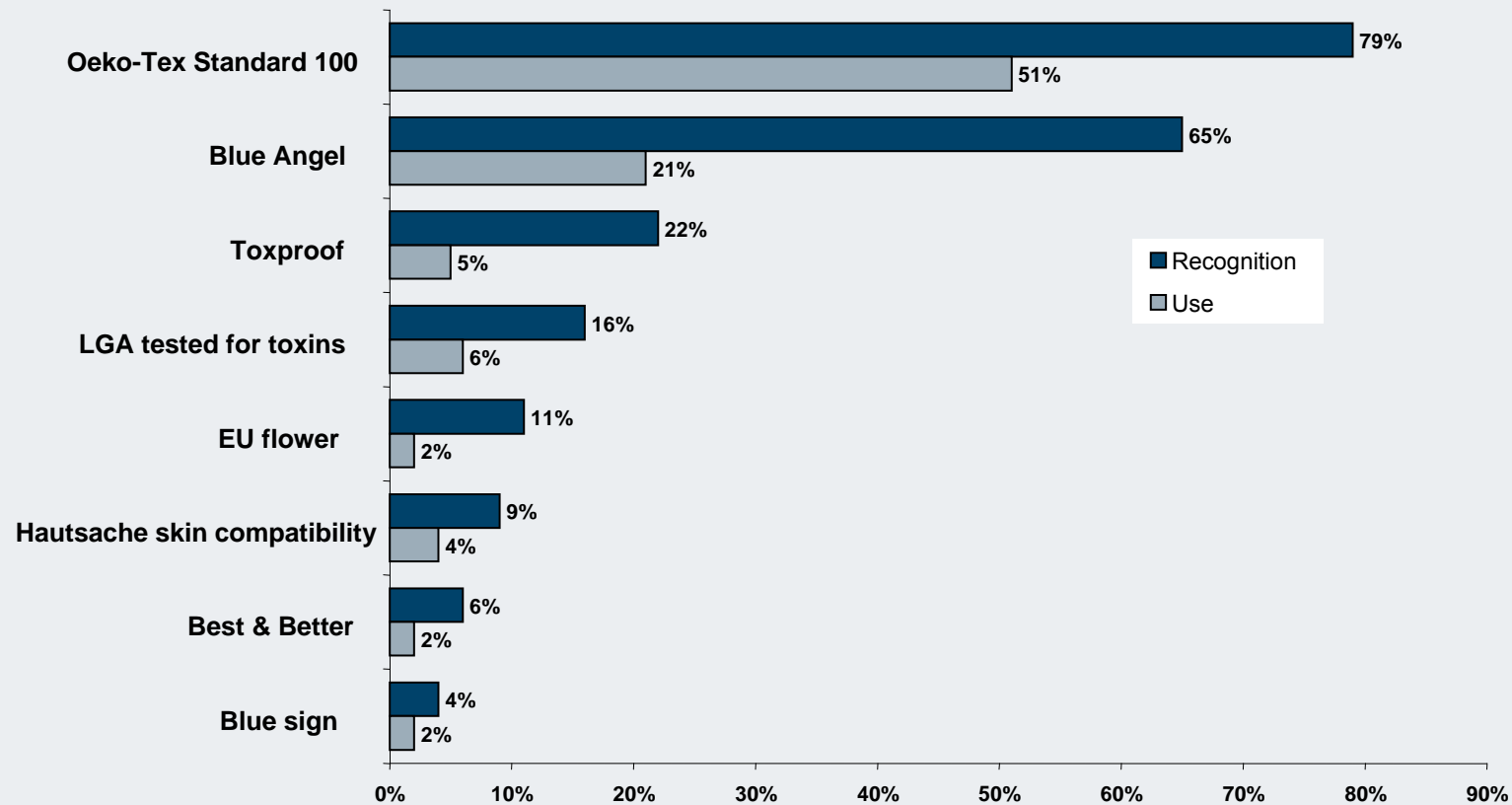
IMPORTANT ISSUES WHEN BUYING CLOTHING AND TEXTILES

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2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

PROMPTED RECOGNITION AND THE USE OF TEXTILE QUALITY MARKS



Source: BBE RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

PROMPTED RECOGNITION AND THE USE OF TEXTILE QUALITY MARKS

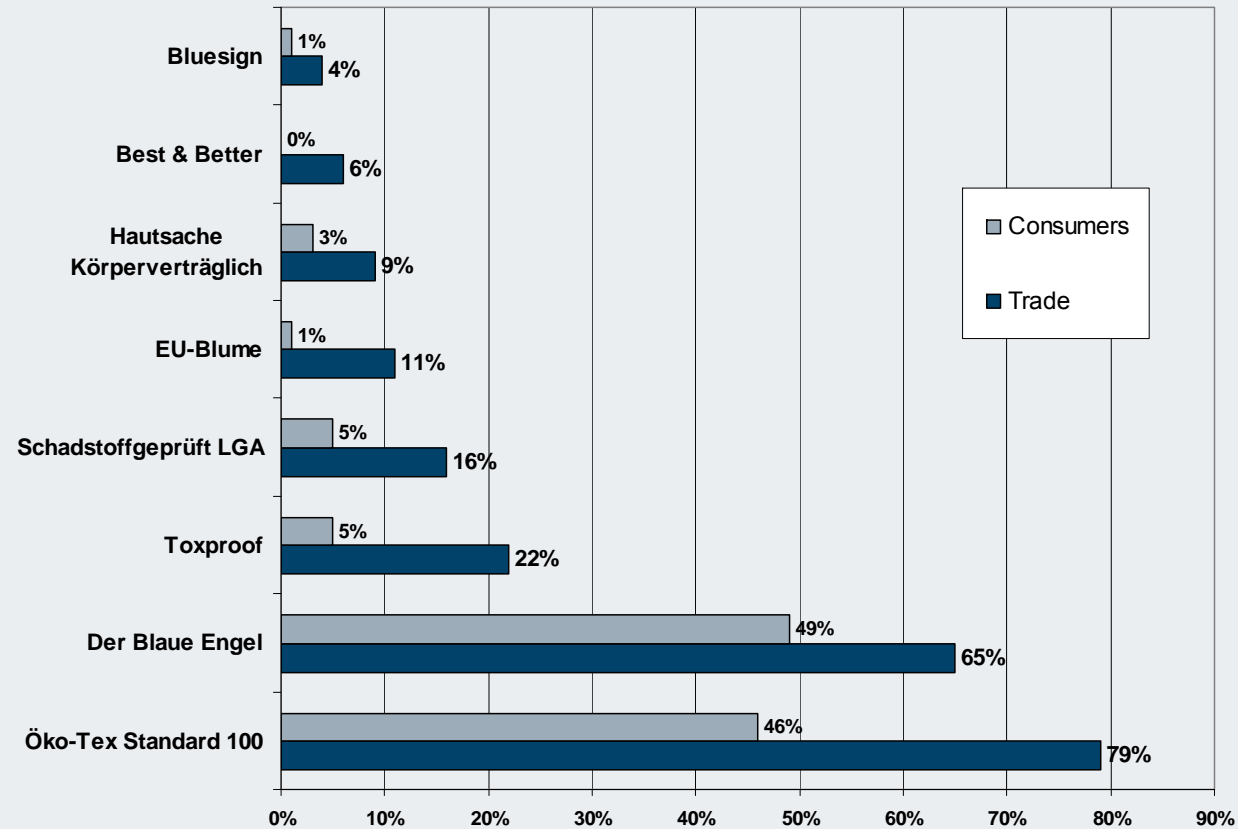
- The prompted questions about the level of recognition of a total of eight textile quality marks reveal a very varied picture: the Oeko-Tex Standard 100 comes off best with a recognition rate of 79% (even 87% among managing directors and heads of department). Of those 79% of those questioned who know of the label, a pleasing 64% also use it in their own range. No significant differences can be identified in relation to the various turnover categories to which those questioned assigned themselves. The level of recognition is also very satisfactory in all the different types of retailing, the specialist independent clothing retailer sector (FEH), department stores and mail-order business, even though there is still room for expansion.

Level of recognition of Oeko-Tex											
Marketing channel			Position				Turnover category				
Specialist clothing retailers	Department stores	Mail order businesses	Managing directors	Heads of department	Buyers	Sales staff	Up to 1 million €	Up to 5million €	Up to 25million €	Up to 50million €	over 50 million €
79%	86%	85%	87%	87%	68%	67%	79%	69%	83%	70%	100%

Quelle: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

PROMPTED RECOGNITION OF TEXTILE QUALITY MARKS



Source Consumers: GfK Gruppe, 2006, n=1.046
Source Trade: BBE RETAIL EXPERTS, 2008, n=205

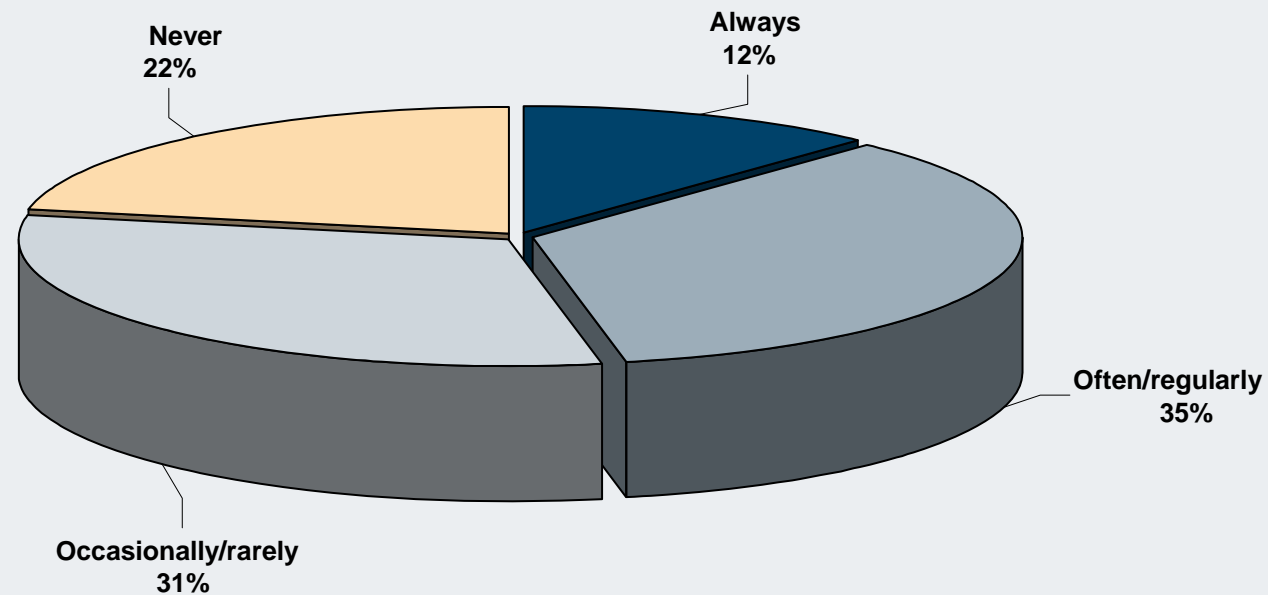
PROMPTED RECOGNITION AND THE USE OF TEXTILE QUALITY MARKS

- In second place came the “Blue Angel”, which 65% of those questioned knew about – but of those, only 31% used it. The Blue Angel dates back 30 years, the oldest environmental quality mark in the world, and used by about 10,000 products and services, but it still did not seem to be particularly well known among the people questioned at the CPD in Düsseldorf. According to the *Handelsblatt* on 19.2.2008 “...80 per cent of Germans are familiar with the round, blue symbol, and 38 per cent take it into account when buying. It therefore continues to exert quite a sales-promoting effect in the retail trade.”
- Next came the quality marks “Toxproof” (recognition rate 22%), “LGA tested for toxins” (16%) and the “EU flower”(11%).

Quelle: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

REFERENCE TO TEXTILE QUALITY MARKS WHEN ADVISING CUSTOMERS



Quelle: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

REFERENCE TO TEXTILE QUALITY MARKS WHEN ADVISING CUSTOMERS

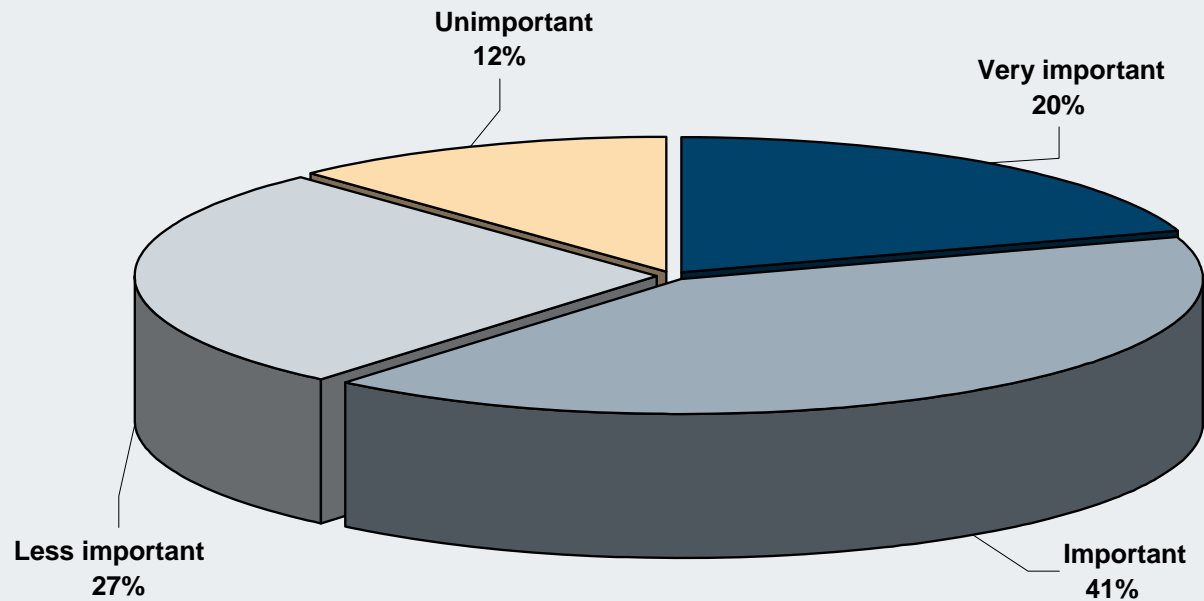
- The question “To what extent do you refer to textile quality marks when advising customers?” also reveals room for improvement, since 22% of those questioned said that they never referred to the various textile quality marks when advising customers, and a further 31% only did it occasionally or rarely.
- Especially sales staff, who after all have the most direct contact with end users, refer to the quality marks particularly rarely. Perhaps they assume that the labels are self-explanatory and that the user does not require any further explanation.

Reference to textile quality marks (totals for “always” and “often/regularly”)											
Marketing channel			Position				Turnover category				
Specialist clothing retailers	Department stores	Mail order businesses	Managing director	Heads of department	Buyers	Sales staff	Up to 1million €	Up to 5million €	Up to 25million €	Up to 50million €	over 50million €
46%	67%	39%	48%	40%	55%	40%	42%	48%	67%	60%	72%

Quelle: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

IMPORTANCE OF HAVING THE QUALITY MARK ENDORSEMENT ON THE PRODUCT ITSELF



Quelle: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

IMPORTANCE OF HAVING THE QUALITY MARK ENDORSEMENT ON THE PRODUCT ITSELF

- It was pleasing to note that nearly 2/3 of those questioned thought that it was (very) important that products should be endorsed with textile quality marks. This gives sales staff and consumers information about the product that can be addressed and explained during sales talks. However, not all sales staff appeared to be aware of this – how else can the fact be explained that 47% of them say that endorsing the product itself is not particularly important.
- Companies with a high volume of sales (turnover categories over 5 million euros) attach a higher importance to endorsement on the product. It is to be supposed that in department stores, where there are fewer staff to give advice, product labelling is very important for informing the consumer, reducing the need for anything to be explained about the articles.

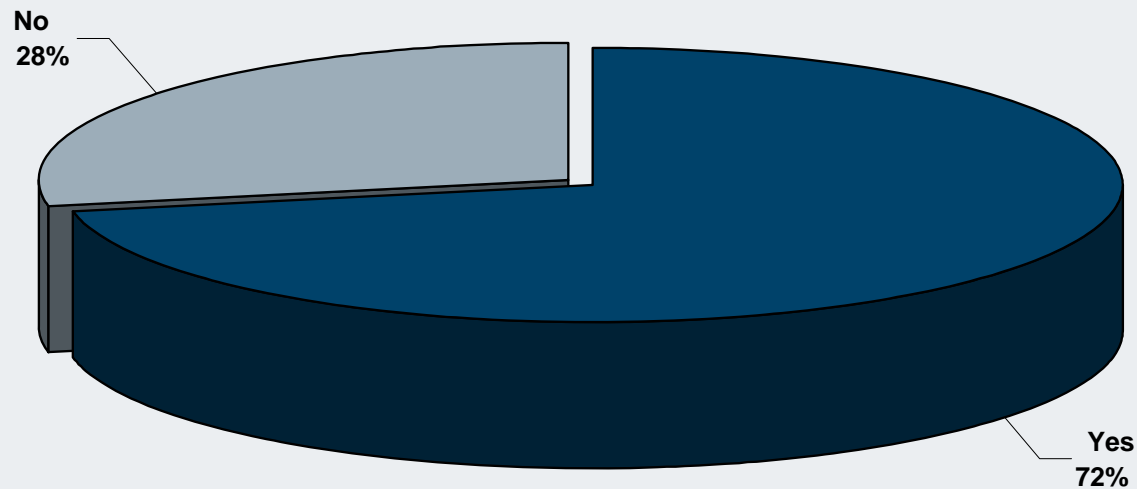
Textile quality marks on the product itself (totals for "very important" and "important")											
Marketing channel			Position				Turnover category				
Specialist clothing retailers	Department stores	Mail order businesses	Managing directors	Heads of department	Buyers	Sales staff	Up to 1million €	Up to 5million €	Up to 25 million €	Up to 50 million €	over 50 million €
61%	81%	46%	58%	53%	72%	50%	58%	55%	67%	70%	79%

Source: **BBE** RETAIL EXPERTS



2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

SHOULD MORE PRODUCTS BE LABELLED AS BEING CERTIFICATED?



Source: **BBE** RETAIL EXPERTS

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SHOULD MORE PRODUCTS BE LABELLED AS BEING CERTIFICATED?

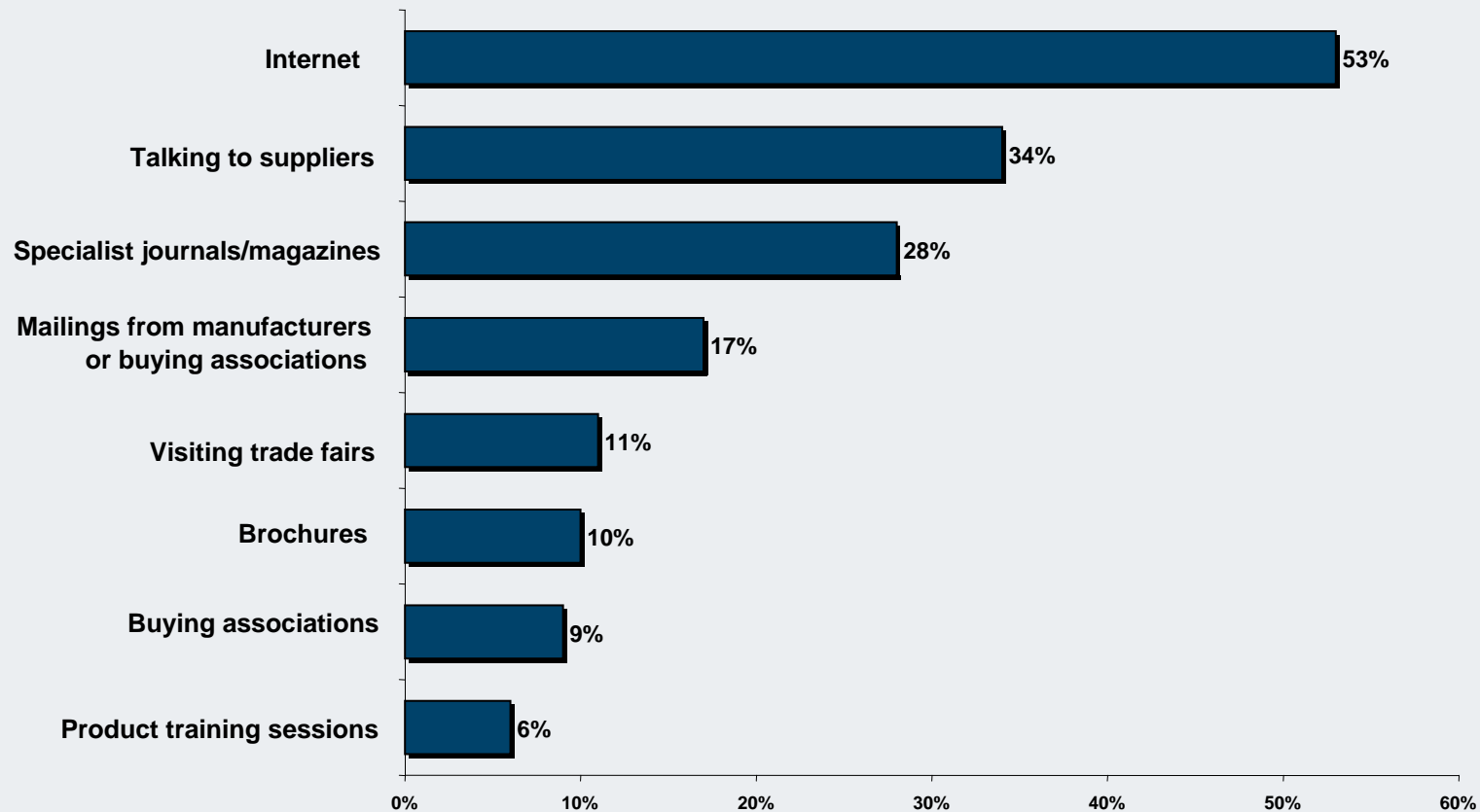
- Even though some of the results presented so far show room for improvement, the answers to the question “Do you think more products and articles should be labelled as being certificated?” were satisfactory. 72% of those questioned would like to see more product endorsement. This applies particularly to the large companies with a higher turnover (key feature for them: products explain themselves, as there are fewer resources to give advice) and across all categories of people questioned, from the sales staff to the senior management.
- However, care should be taken that the consumer is not overwhelmed and does not feel more confused because of the labels than they did before buying. Including too many product parameters may be counter-productive here.

Should more products be labelled as being certificated? (Proportion of yes answers)											
Marketing channel			Position				Turnover category				
Specialist clothing retailers	Department stores	Mail-order business	Managing director	Heads of department	Buyers	Sales staff	Up to 1million €	Up to 5 million €	Up to 25million €	Up to 50million €	over 50 million €
67%	91%	69%	67%	80%	66%	77%	66%	69%	83%	80%	93%

Source: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

SOURCES OF INFORMATION ABOUT THE VARIOUS TEXTILE QUALITY MARKS



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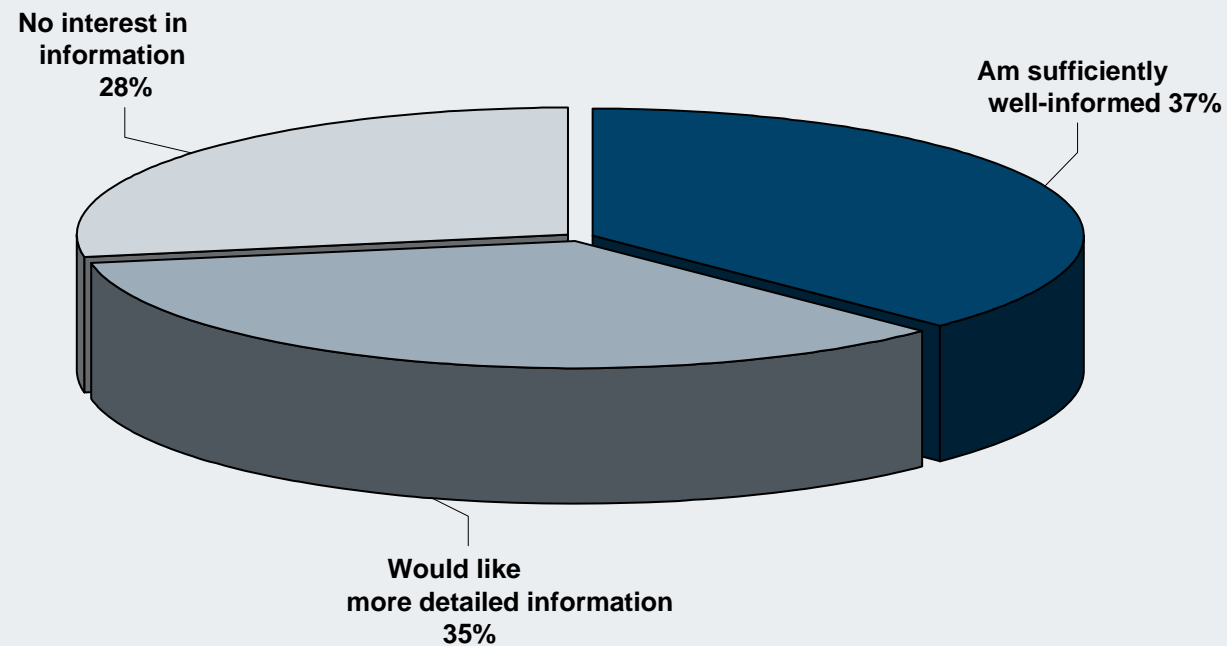
SOURCES OF INFORMATION ABOUT THE VARIOUS TEXTILE QUALITY MARKS

- The ways of obtaining information about textile quality marks are very diverse. It was therefore worth asking where the people questioned obtained their detailed information about product features and the particular characteristics of the various quality marks. These findings can be used to give the certification centre useful advice about targeted marketing.
- The main source of information is the Internet. 53% of those questioned said it was their main source of information.
- Only in second place, with a proportion of 34%, came talks with suppliers – and this was particularly the managing directors and heads of department who were questioned, and the companies with a higher turnover. Mailings from manufacturers or buying associations were also mentioned by nearly one in five of the people questioned, underlining the importance of suppliers, even though this now faces “competition” or “supplementing” by the Internet.
- Nor should “specialist journals/magazines” be underestimated as a source of information – 28% of those questioned said of this medium that they turned to it when they had the necessary time and peace and quiet.
- Visits to trade fairs also represent an important source of information, especially for the buyers we questioned.

Source: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

SPECIFIC LEVEL OF INFORMATION ABOUT THE OEKO-TEX STANDARD 100 ("CONFIDENCE IN TEXTILES" LABEL)



Source: **BBE** RETAIL EXPERTS

SPECIFIC LEVEL OF INFORMATION ABOUT THE OEKO-TEX STANDARD 100 (“CONFIDENCE IN TEXTILES” LABEL)

- While it did appear that the level of recognition of the Oeko-Tex Standard 100 was very satisfactory compared with other quality marks, nevertheless only about a good third of those questioned felt that they were fully and adequately informed about this textile quality mark. Among the most well-informed groups were the heads of department and the buyers, and companies with annual sales over 5 million euros.
- A further third of those interviewed would like to have more extensive information. This was particularly true of the sales staff, who, as mentioned before, were less active in referring to the quality marks during their sales talk.
- About 28% of the visitors to the show who were questioned were not interested in any information.
- There were a few comments made in connection with this question, offering criticism or suggestions for improvements : more information for customers, make the quality mark more popular, keep to strict test conditions, too much diversity in quality marks, too much opportunity for fraud.

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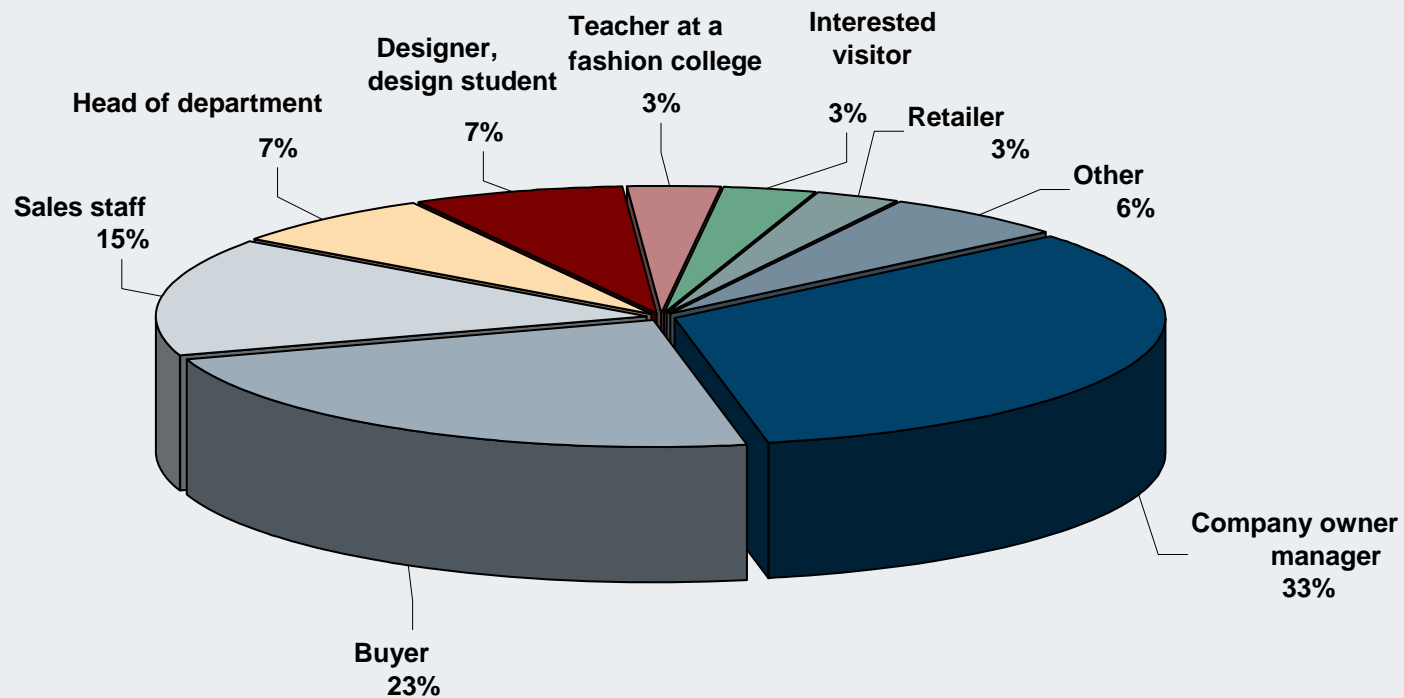
COMPOSITION OF THOSE QUESTIONED

- The following pages show the structural composition of the 205 people we interviewed. We managed to cover a wide range of people in the categories of type of visitor to the show, type of retailing, number of employees and turnover category, resulting in a meaningful representation of ideas on the subject of textile quality marks.

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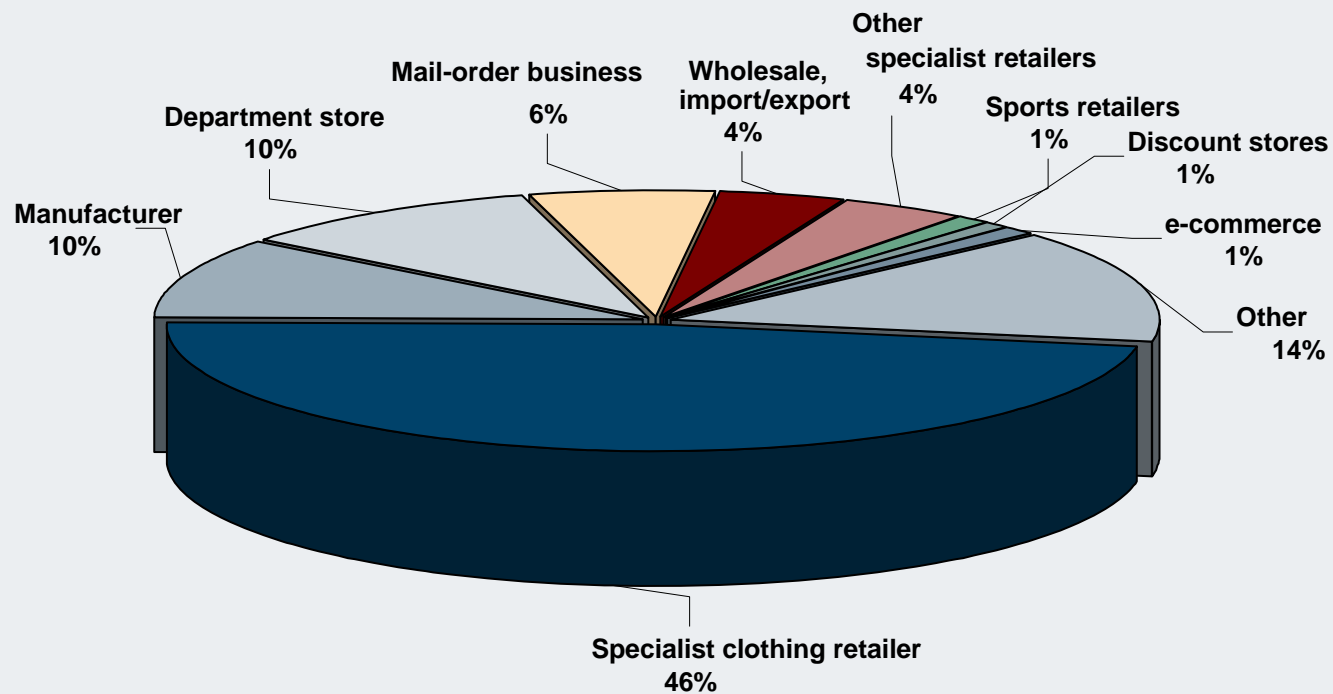
COMPOSITION OF THOSE QUESTIONED: TYPE OF VISITOR TO TRADE FAIR



Source: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

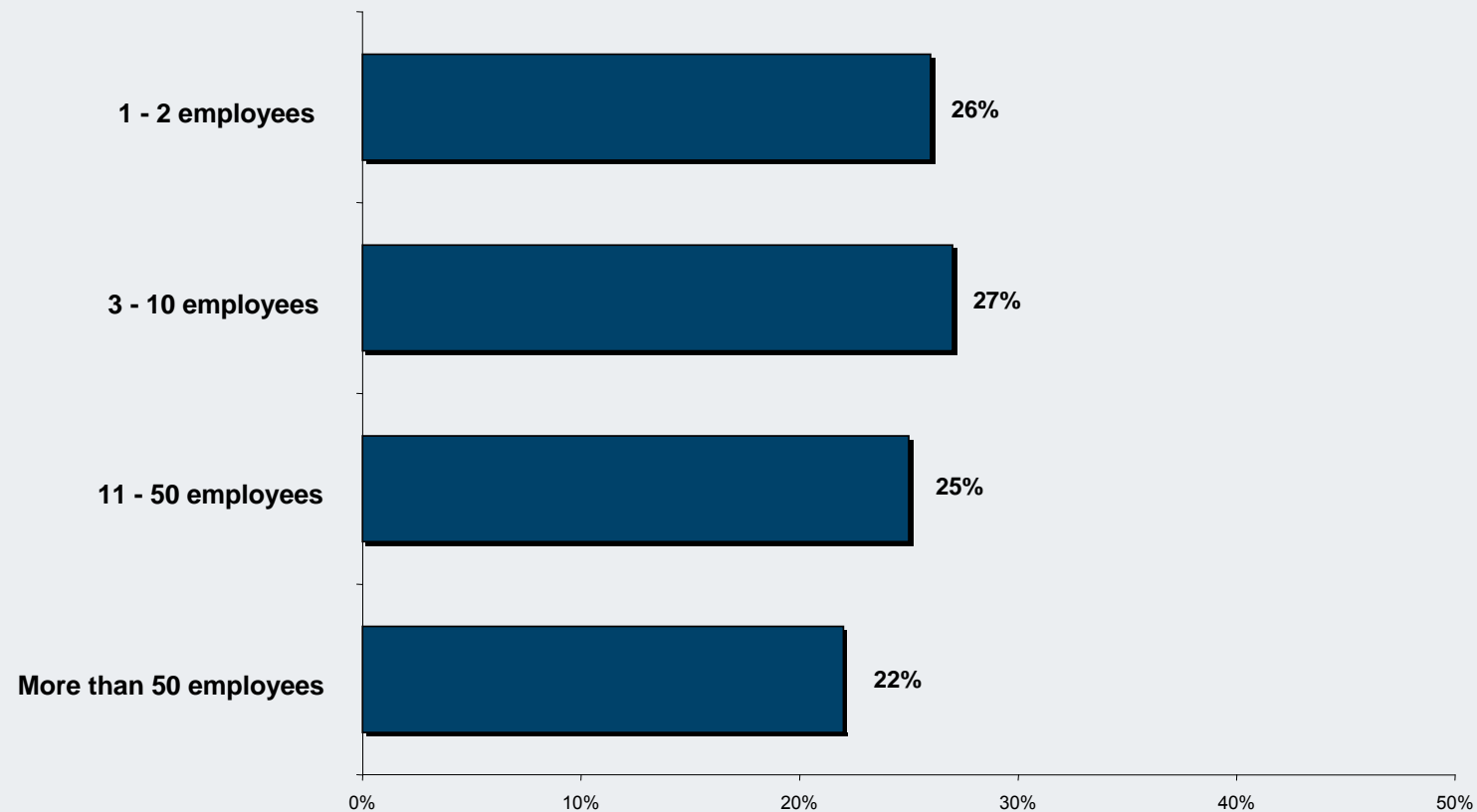
COMPOSITION OF THOSE QUESTIONED: TYPE OF RETAILER



Source: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

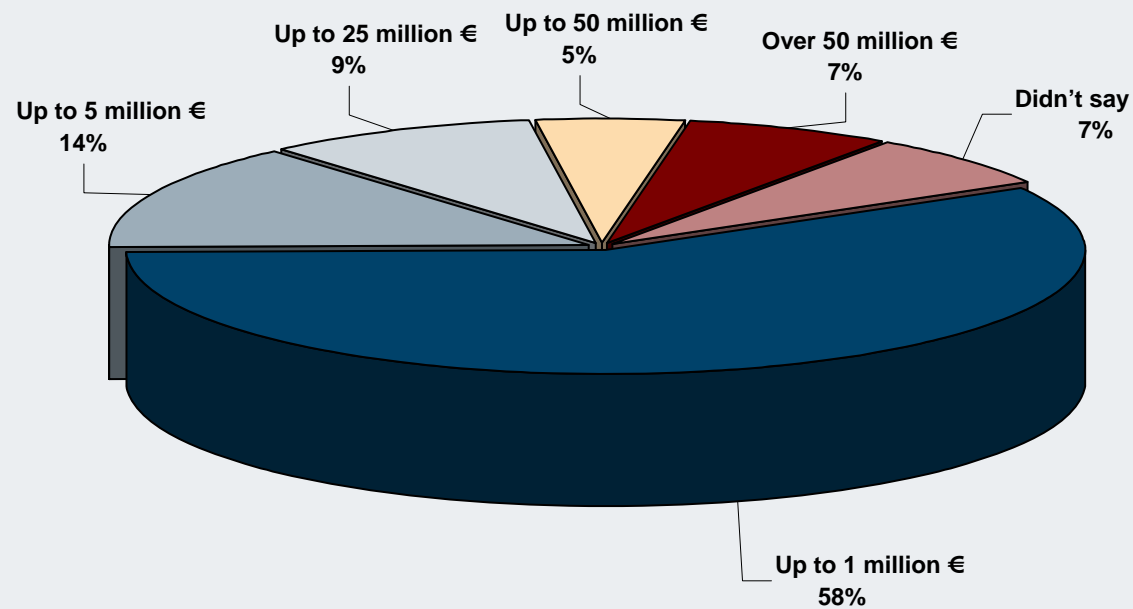
COMPOSITION OF THOSE QUESTIONED: NO. OF EMPLOYEES



Source: **BBE** RETAIL EXPERTS

2 RESULTS OF THE RETAILERS' QUESTIONNAIRE

COMPOSITION OF THOSE QUESTIONED: TURNOVER CATEGORIES



Source: **BBE** RETAIL EXPERTS