



**SURVEY ON CONSUMER SATISFACTION WITH THE
RETAIL DISTRIBUTION OF GOODS**

PRODUCT MARKET REPORT

CLOTHING AND FOOTWEAR

BY
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for

THE EUROPEAN COMMISSION
Health & Consumer Protection
Directorate - General

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Chapter 1 - Introduction

1. Preliminary note

The objective of this report is to present the main findings of the survey for the market for **Clothing and Footwear**. It details consumers' satisfaction with various aspects of this market.

The first level of analysis aims to describe consumers' feelings about the market and about elements that constitute their retailers' services as well as the problems encountered when purchasing its products.

For each question asked in the questionnaire, a chart presents the results at EU and country level. When relevant, we also highlight the differences by distribution channel and socio-demographic profile of the respondent.

The main indicator used in the analysis (which is widely admitted amongst the research experts' community) is the percentage of satisfied and dissatisfied consumers, based on the scores given on a scale from 1 to 10. "Satisfied" are those who gave a satisfaction score of 8 to 10; "dissatisfied" are those who gave a score of 1 to 4. For the clarity of the analysis, we do not show the 'neutral' consumers (scores 5-7) on the charts or those who could not give an answer to the question ("don't know"). This is why the figures shown in most of the charts do not add up to 100%. If there are particularly large proportions of 'Don't know' answers this is however mentioned in the text.

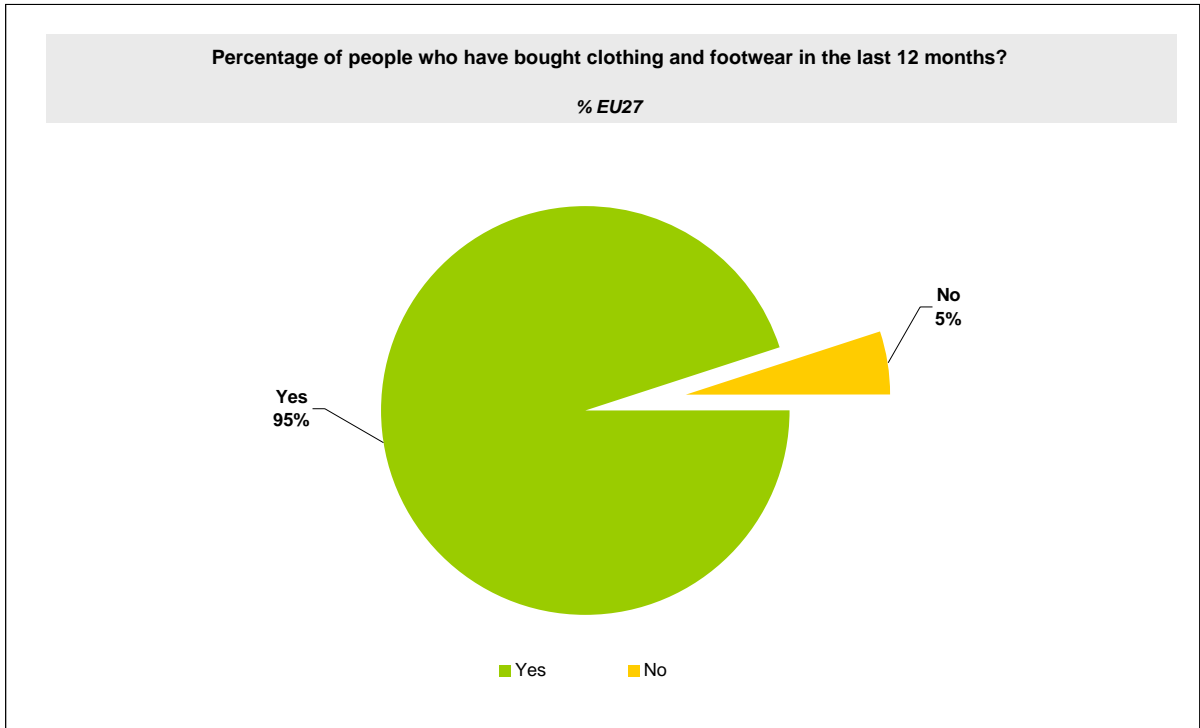
The second level of analysis presented in this report shows the interaction of key satisfaction indicators so as to explain consumers' overall satisfaction.

For more information, the reader will find the overall report, country reports and full results of the survey as well as a methodological note on DG SANCO web site:

http://ec.europa.eu/consumers/strategy/cons_satisfaction_en.htm

1. Product bought by consumers in the last 12 months

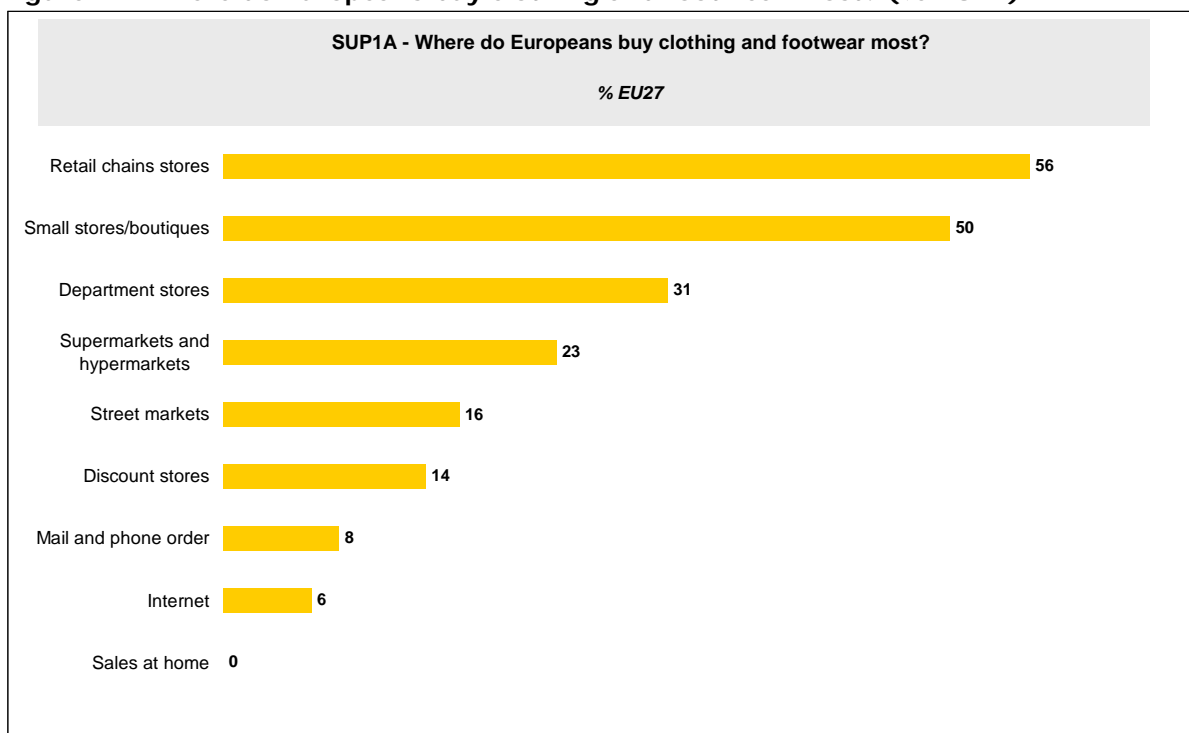
Figure 1 – Percentage of people who have bought clothing and footwear in the last 12 months



95% of consumers in the EU27 have bought clothing and footwear in the last 12 months.

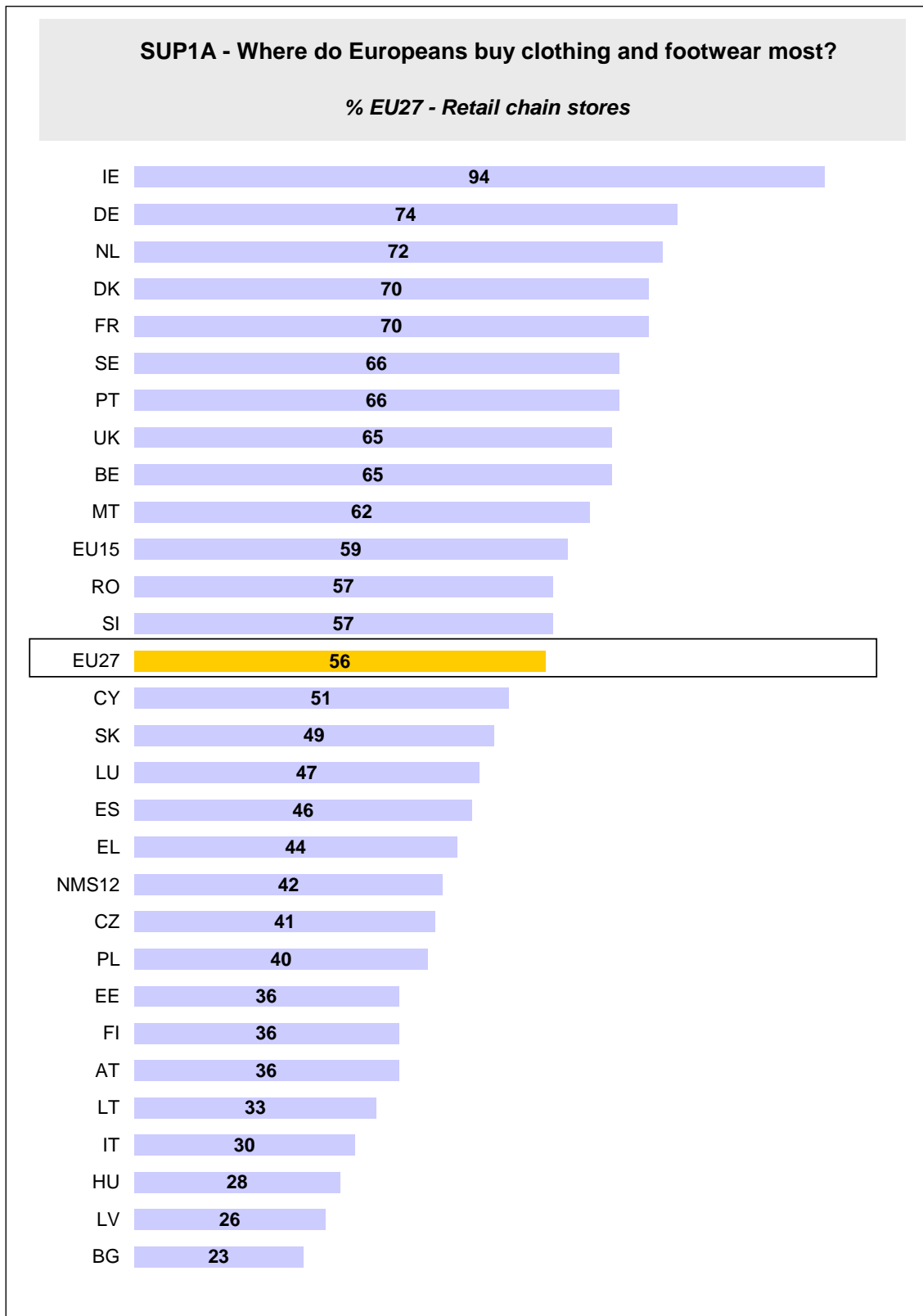
2. Distribution channels used

Figure 2 – Where do Europeans buy clothing and footwear most? (% EU27)



Respondents were asked to say where they have bought clothing and footwear most (i.e. usual places). They could indicate several distribution channels. From the results it appears that clothing and footwear are mostly purchased in retail chains stores (56%) and in small stores/boutiques (50%). More than three EU consumers in ten have also bought goods in department stores and almost a quarter in supermarkets and hypermarkets. 6% of Europeans have bought their clothing and footwear on the Internet.

Figure 3 – Distribution channels mostly used: Retail chains stores (% by country)



Consumers are most likely to buy clothing and footwear in retail chain stores. This is the case for 94% Irish consumers, but only for 23% of Bulgarians, 26% of Latvians, 28% of Hungarians and 30% of Italians. Interesting to note are the differences between EU15 countries and NMS12 countries (59% against 42%).

In Greece, Ireland and Malta more than 80% of consumers tend to buy these products in small stores/boutiques. This is also the case of more than 70% of Slovaks and of Danes.

In addition, 80% of Irish consumers and 72% of people of Luxembourg report they have bought clothing and footwear in department stores.

Finally, 63% of British consumers and one in two Danes declared buying clothing and footwear in supermarkets and hypermarkets. In Denmark, 3 consumers in 10 also declared having bought clothing and footwear on the Internet.

Detailed results are shown in the following charts.

Figure 4 – Distribution channels mostly used: Small stores/boutiques (% by country)

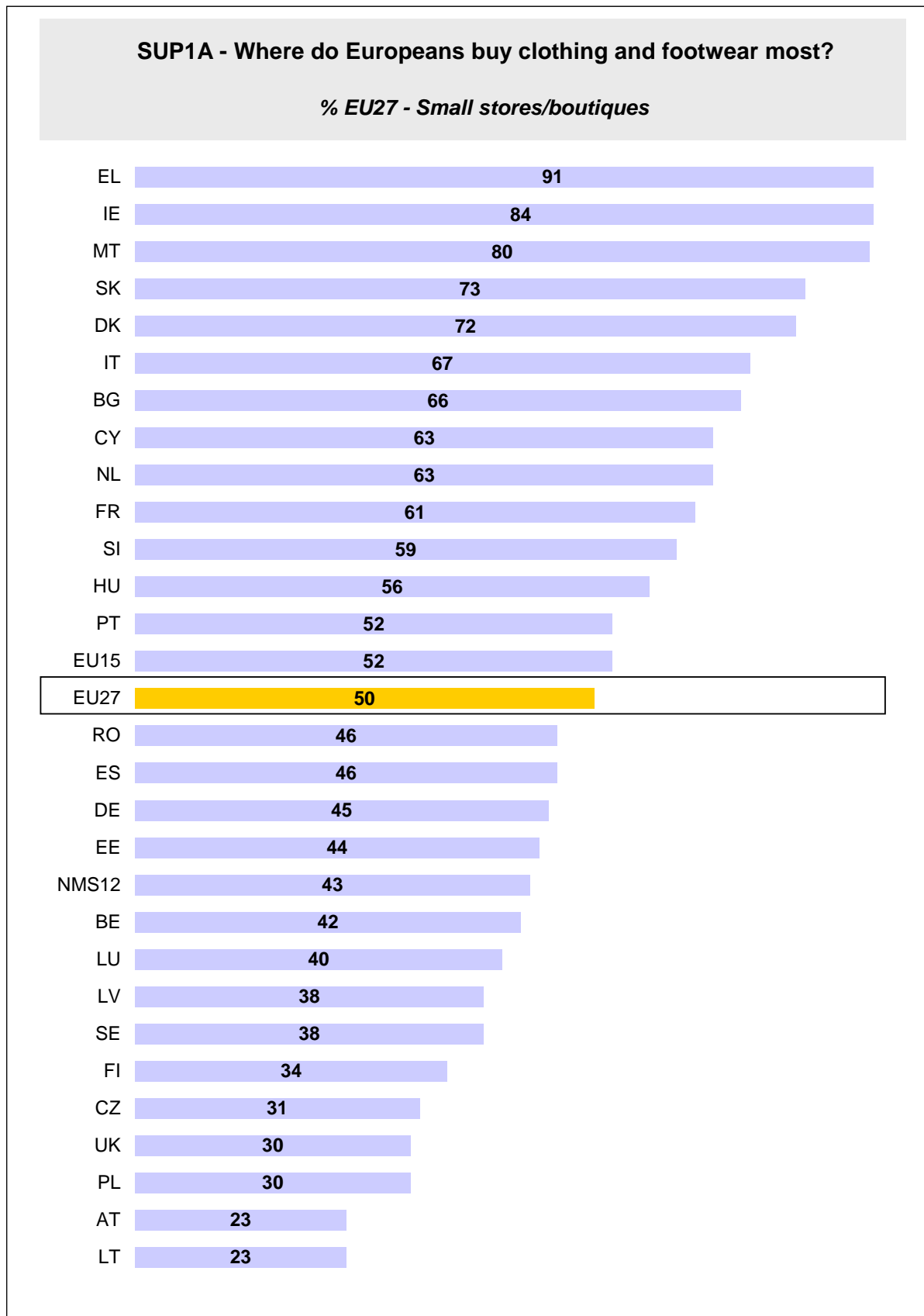
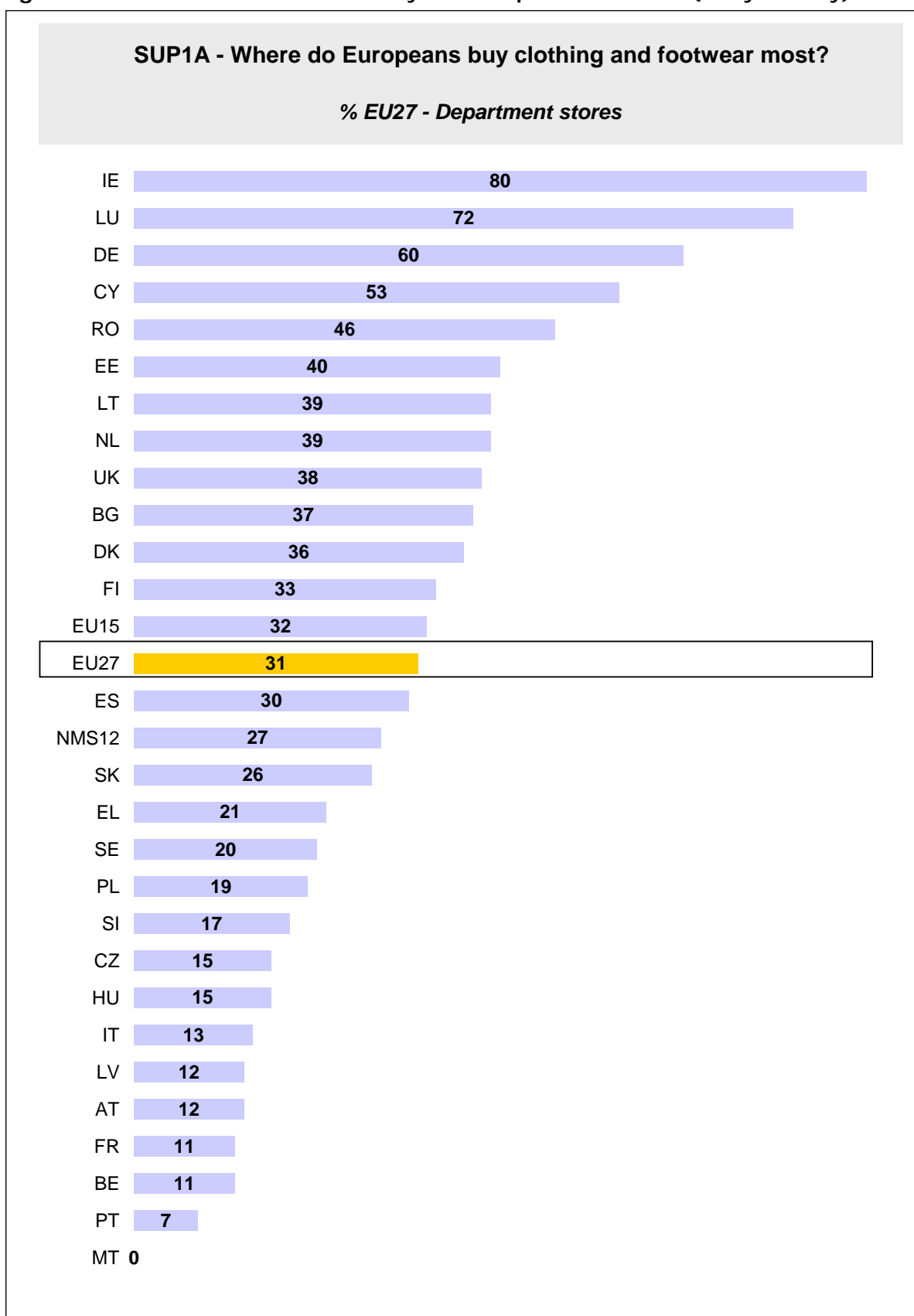
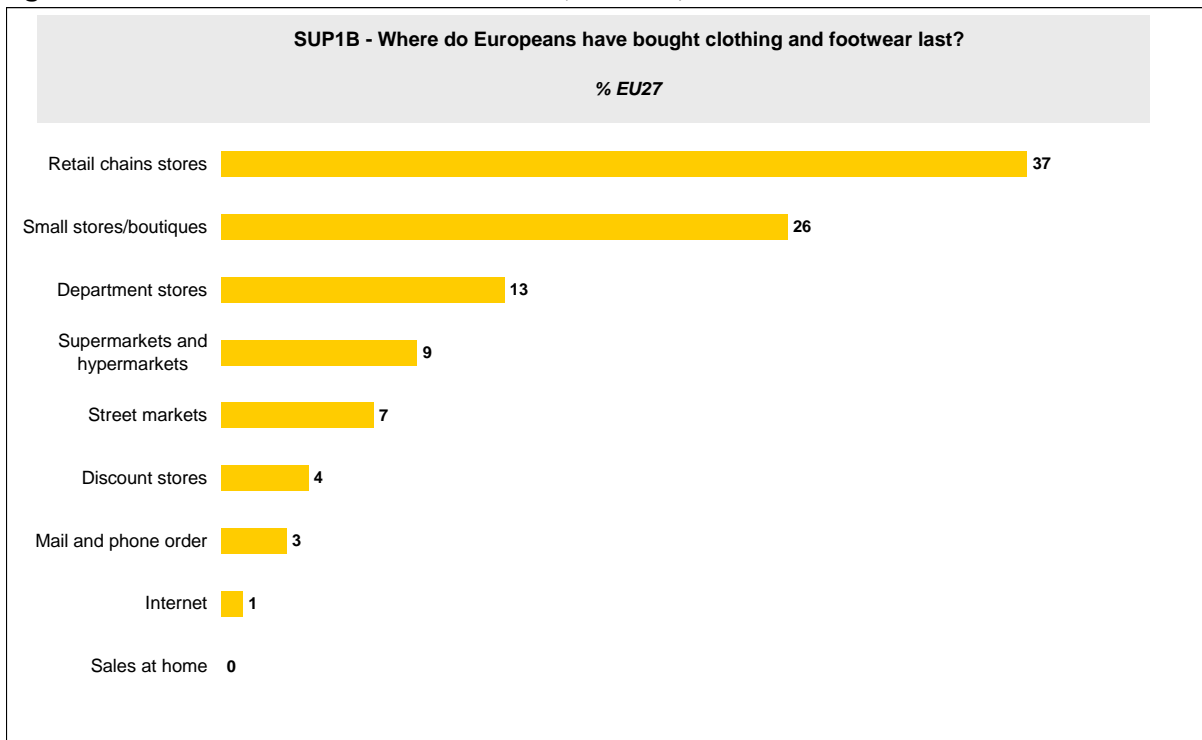


Figure 5 – Distribution channels mostly used: Department stores (% by country)



Consumers were also asked to indicate where (i.e. only one answer) they last bought clothing and footwear. 37% of consumers mentioned retail chains stores and 26% declared they bought their products in small stores/boutiques, as shown in the following chart.

Figure 6 – Distribution channel used last (% EU27)



Consumers were then asked to evaluate the product market on different dimensions, based on their last purchase experience. Results are shown in the following chapters.

Chapter 2 – Overall satisfaction

1. Overall satisfaction with the retailer

1.1. OVERALL RESULTS

Three EU consumers in four are satisfied with their retailer when it comes to buying clothing and footwear.

The proportion of consumers who are dissatisfied is marginal (1%), whether in the EU15 or in the NMS12.

1.2. DIFFERENCES BY DISTRIBUTION CHANNEL

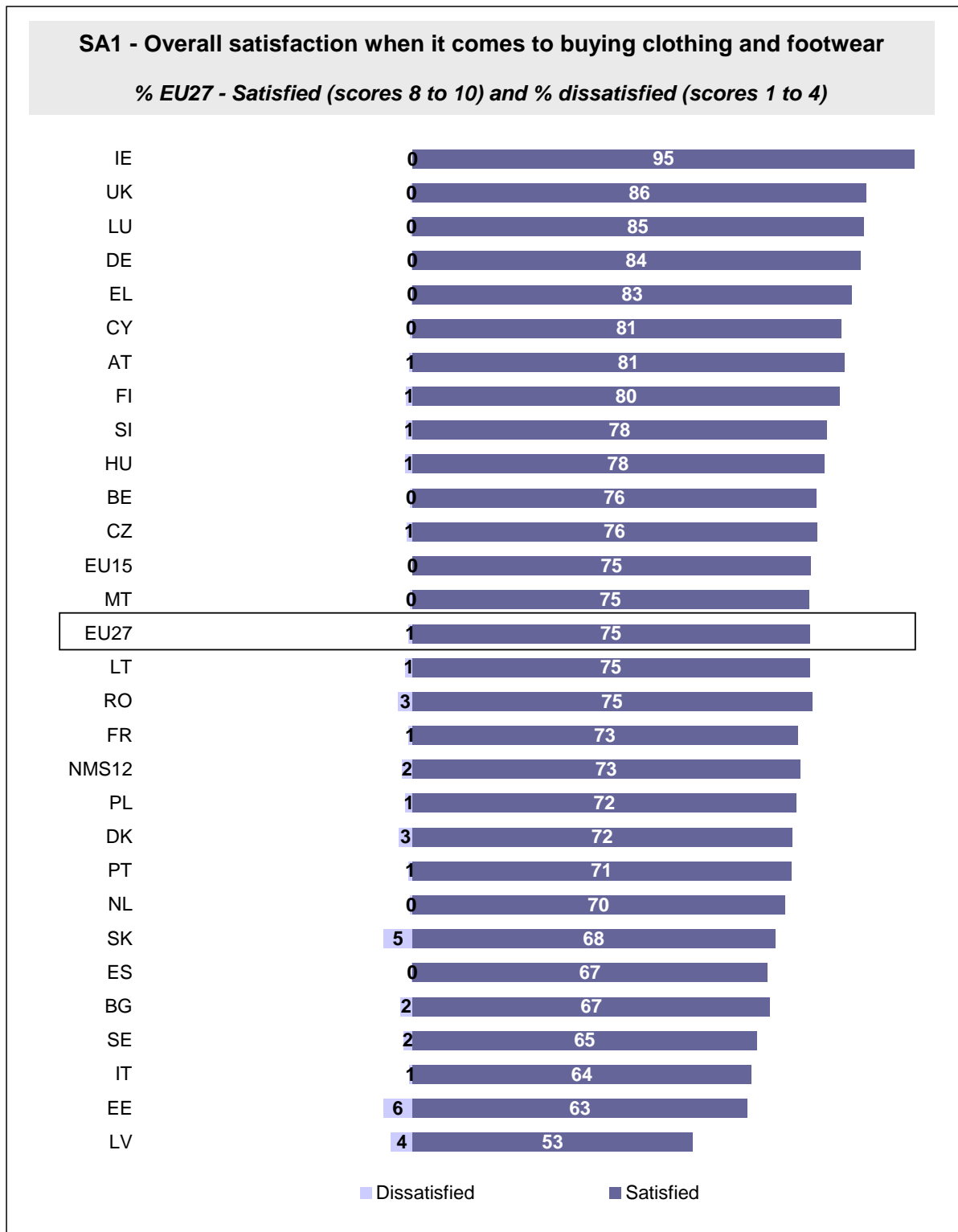
There are no significant differences in the results by distribution channel when speaking of overall satisfaction – except for the fact that consumers who purchase their clothing and footwear on street markets seem less satisfied than the average EU consumer (59% against an EU average satisfaction of 75%).

1.3. DIFFERENCES BETWEEN EU MEMBER STATES

In all European countries, an absolute majority of consumers are satisfied with their retailer when it comes to buying clothing and footwear. This is especially the case of 95% of consumers in Ireland whereas only 53% of Latvians declared themselves satisfied. The proportion of dissatisfied consumers is marginal across the countries.

Results are shown in the following chart.

Figure 7 - Overall satisfaction with retailer (% by country)



1.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

Results broken down by socio-demographic variables do not show significant differences, except for those who finished full-time education before the age of 16 who seem less satisfied than the others with their retailer.

2. Value for money of products

2.1. OVERALL RESULTS

Overall, EU consumers seem to be satisfied with their retailer's prices/quality when it comes to clothing and footwear (67% satisfied consumers). Satisfaction is quite similar between consumers from the new Member States (68%) and those of the former EU15 (66%). Very few people are dissatisfied whether in the EU15 or in the NMS12 (2% on average).

2.2. DIFFERENCES BY DISTRIBUTION CHANNEL

Consumers who buy clothing and footwear in discount stores are the most satisfied with the value for money offered by their retailer (80% satisfied against an EU average of 67%). The least satisfied are those who buy these products on street markets (56%) and in small stores/boutiques (59%).

2.3. DIFFERENCES BETWEEN EU MEMBER STATES

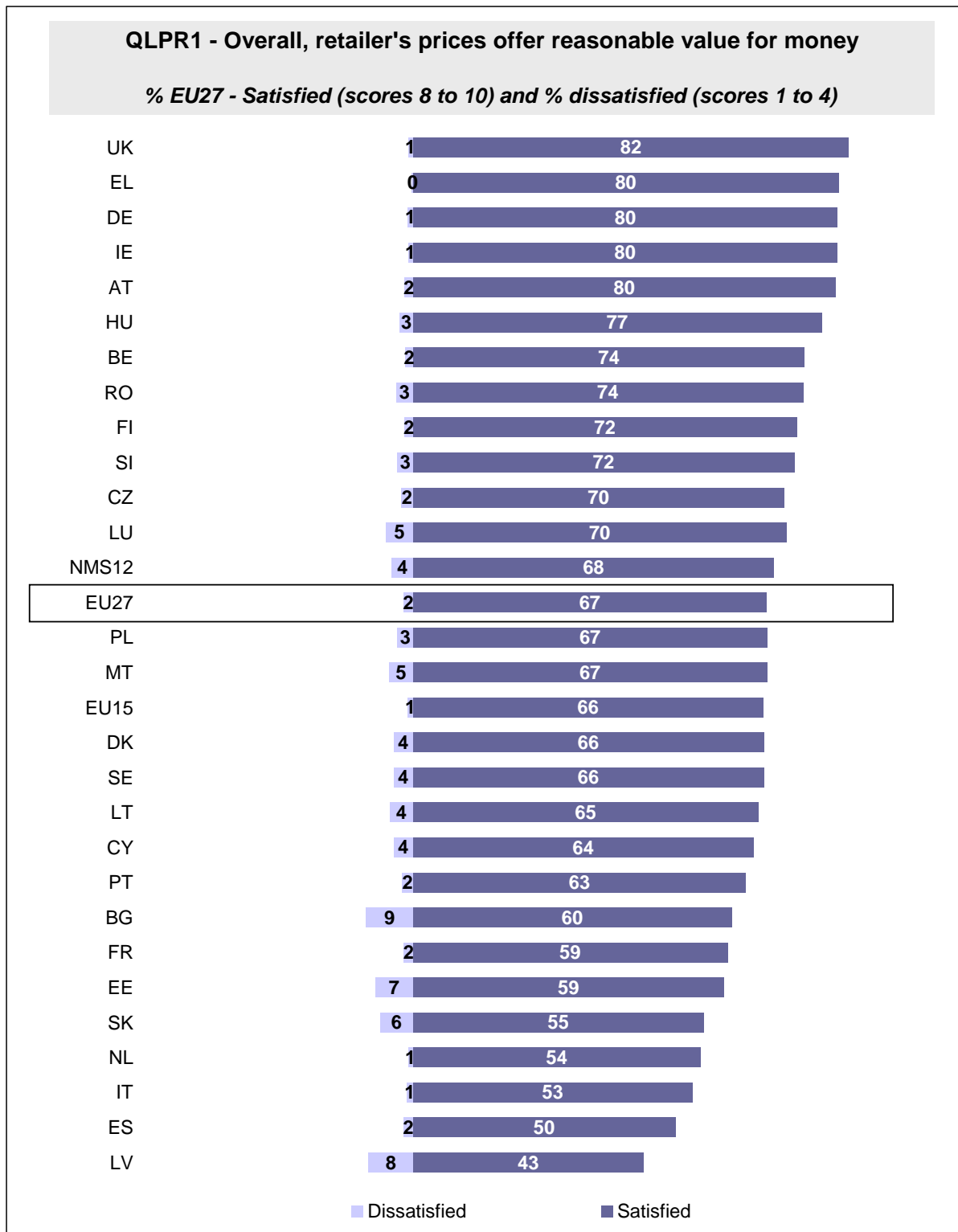
In the following countries, at least 8 consumers in 10 are satisfied with their retailer's prices/quality when it comes to clothing and footwear: the UK (82%), Greece, Germany, Ireland and Austria (80% each).

On the other side of the spectrum we find Latvia (43%), Spain (50%), Italy (53%), the Netherlands (54%) and Slovakia (55%).

It is also interesting to note the relatively low proportion of dissatisfied consumers (EU27 average of 2%).

Results are shown in the following chart.

Figure 8 – Overall price and quality (% by country)



2.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

As previously observed, those who studied the least, but also students, tend to be slightly less satisfied than the average when it comes to evaluate the value for money offered by their retailer.

3. Quality of services

3.1. OVERALL RESULTS

Overall, 7 EU consumers in 10 seem to be satisfied with the quality of services offered by their retailer when it comes to clothing and footwear. Consumers from the New Member States tend to be slightly less satisfied (69% satisfied) than the others (71% in the EU15). Very few people are dissatisfied whether in the EU15 or in the NMS12 (2% in the EU27).

3.2. DIFFERENCES BY DISTRIBUTION CHANNEL

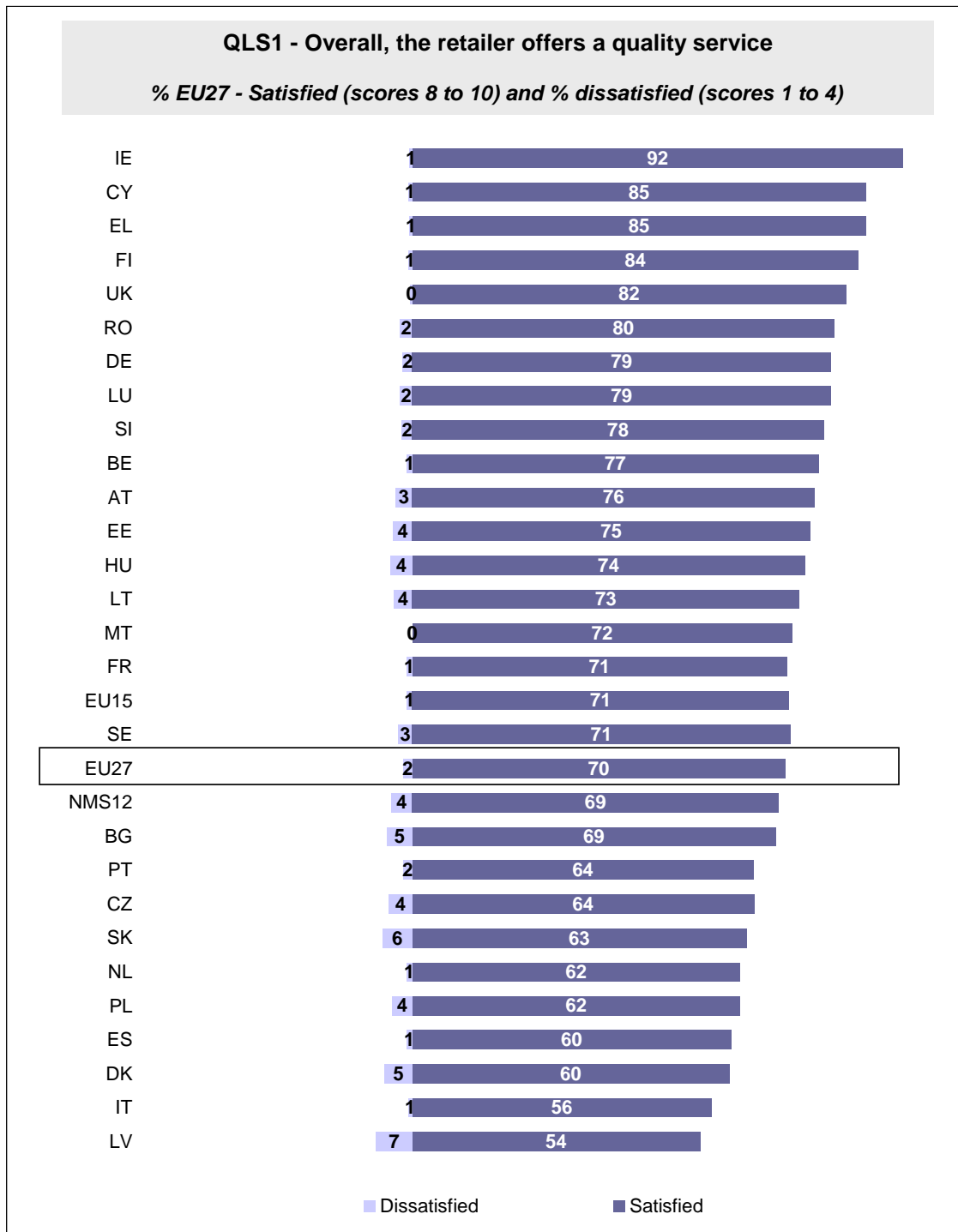
Those who purchase clothing and footwear in department stores (75%) and retail chains stores (74%) seem to be more satisfied with the quality of service offered by their retailer than those who purchase these products through other channels of distribution, particularly on street markets (45%).

3.3. DIFFERENCES BETWEEN EU MEMBER STATES

In all EU Member States, consumers are satisfied with the quality of services offered by their retailer, particularly in Ireland (92%). On the other side of the spectrum we find Latvia and Italy, where less than 60% of consumers said they were satisfied with the quality of services offered by their retailer. Very few declared they were dissatisfied (an EU average of 2%).

Results are shown in the following chart.

Figure 9 – Overall quality service (% by country)



3.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

Again, the least educated and the students seem to be the least satisfied when it comes to evaluate the quality of services offered by their retailer. The unemployed (66%) as well are less satisfied, whereas the managers are the most satisfied (74%).

4. Respect of consumer protection rules

4.1. OVERALL RESULTS

Overall, 65% of consumers think that their retailer is trustworthy and adheres to the rules set in place to protect them. No differences are perceived between the NMS12 and the EU15. Dissatisfied opinions are more likely to be found in the NMS12 (4%) than in the EU15 (1%).

4.2. DIFFERENCES BY DISTRIBUTION CHANNEL

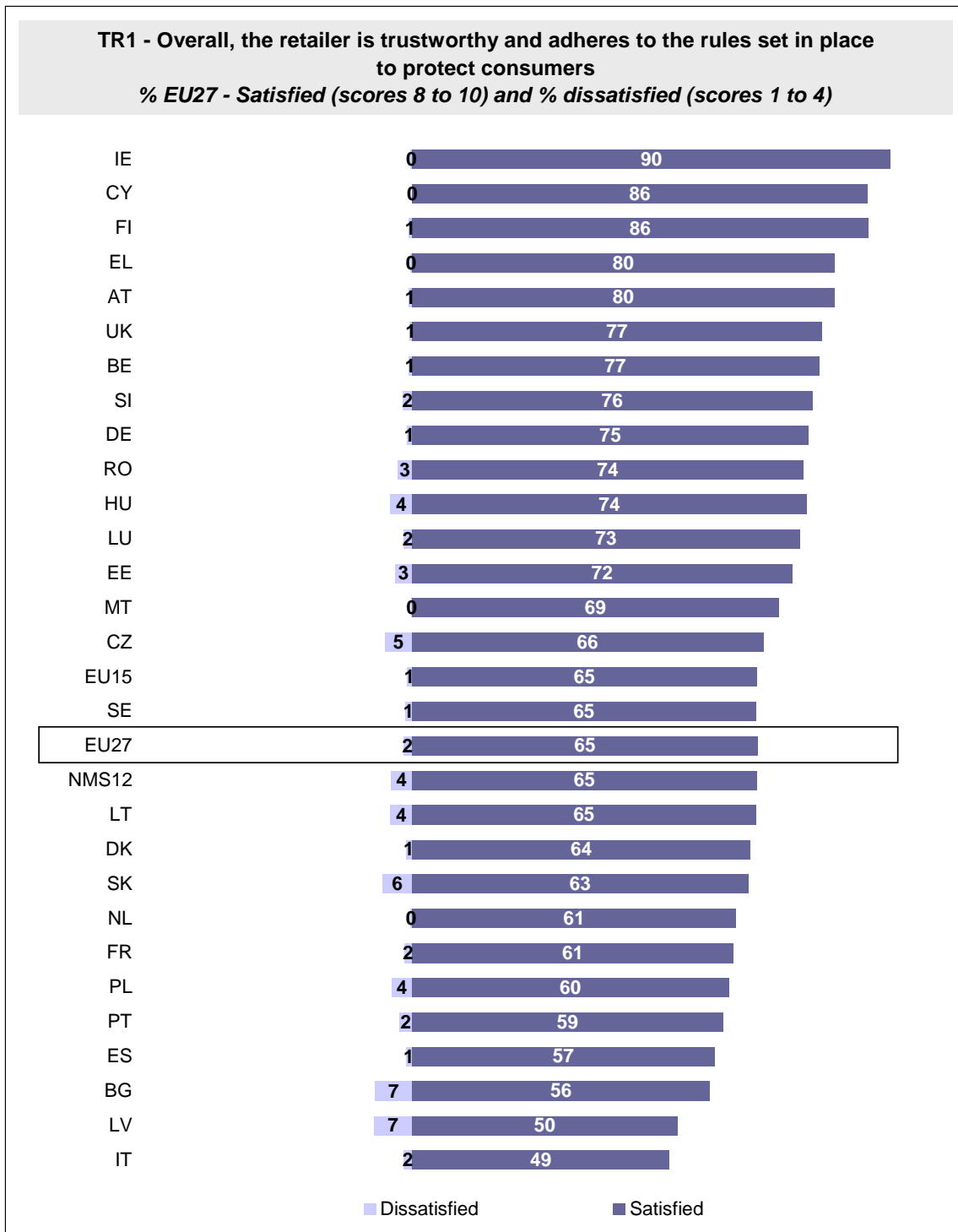
Those who purchase clothing and footwear on street markets (40%) are much less inclined than the others, especially those who buy these products in department stores (70%), to think their retailer is trustworthy and adheres to the rules set in place to protect consumers.

4.3. DIFFERENCES BETWEEN EU MEMBER STATES

If 65% of European consumers think their retailer is trustworthy and adheres to the rules set in place to protect them, they are 90% in Ireland and 85% in Cyprus and Greece to think so, but only 49% in Italy and 50% in Latvia. Low proportions of dissatisfied consumers can be observed (an EU average of 2%).

Results are shown in the following chart.

Figure 10 – Overall trust (% by country)



4.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

As previously observed, the older the consumer the more satisfied with the retailer. Those who studied until the age of 15 years old are by far the least satisfied (57%) with the way their retailer comply with consumer protection rules.

5. Satisfaction with market

5.1. OVERALL RESULTS

Overall, EU consumers seem to be satisfied with the market for clothing and footwear (68% satisfied). Very few people are dissatisfied (2% on average).

5.2. DIFFERENCES BY DISTRIBUTION CHANNEL

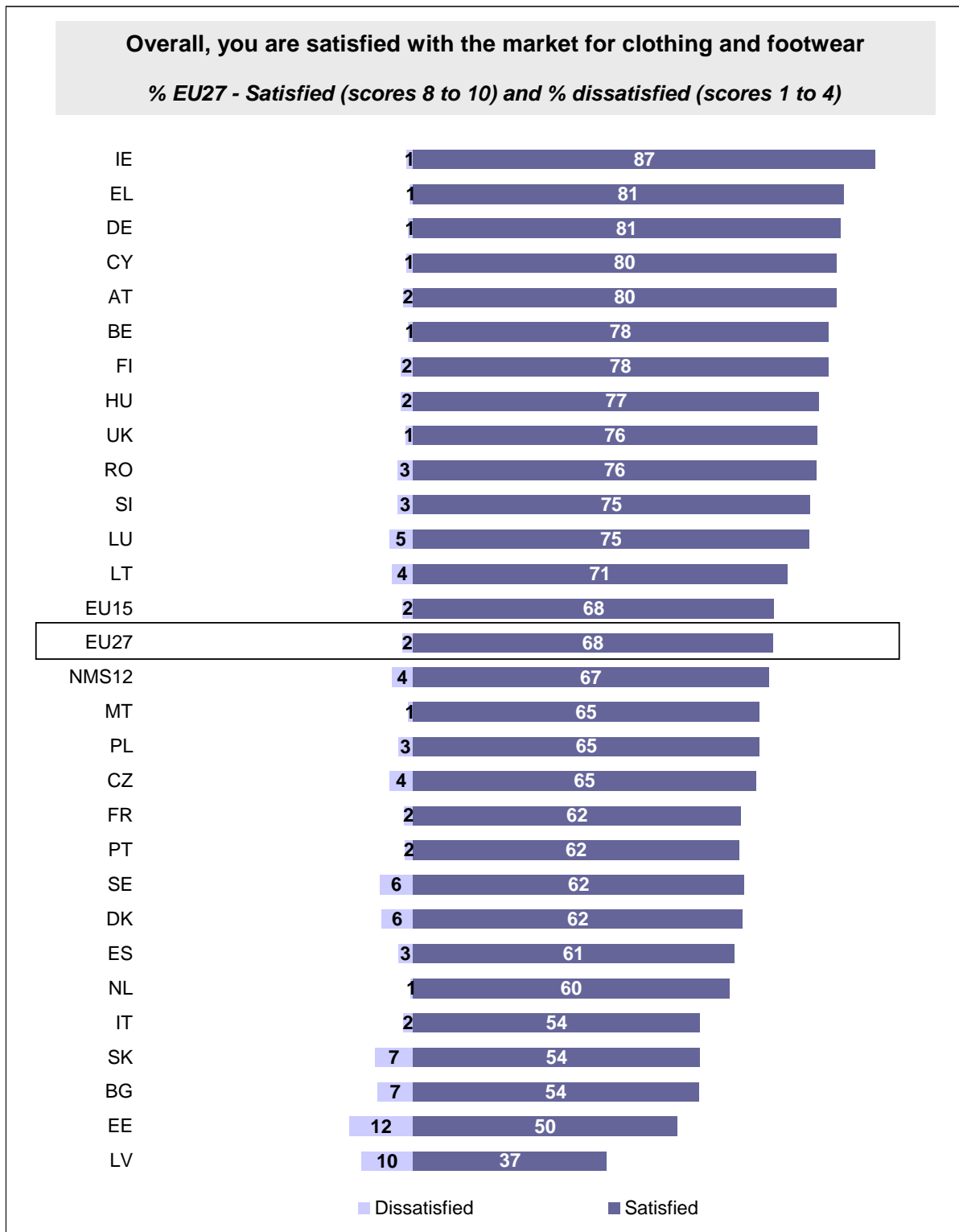
Consumers who generally purchase clothing and footwear on street markets (55%), in small stores/boutiques (63%) and in super/hypermarkets (67%) give a more negative evaluation of the market in general than those who purchase these products through other distribution channels.

5.3. DIFFERENCES BETWEEN EU MEMBER STATES

In most of the EU27 Member States, at least 6 consumers in 10 are satisfied with the market for clothing and footwear. The most satisfied consumers are found in Ireland (87% satisfied), whereas the least satisfied are found in Latvia (37%), Estonia (50%), Bulgaria, Slovakia and Italy (54% each). Finally, 12% of Estonian and 10% of Latvian consumers declare being dissatisfied with this market, although the EU27 average is rather low (2%).

Results are shown in the following chart.

Figure 11 – Overall satisfaction with the market (% by country)



5.4. DIFFERENCES BY SOCIO-ECONOMIC PROFILE

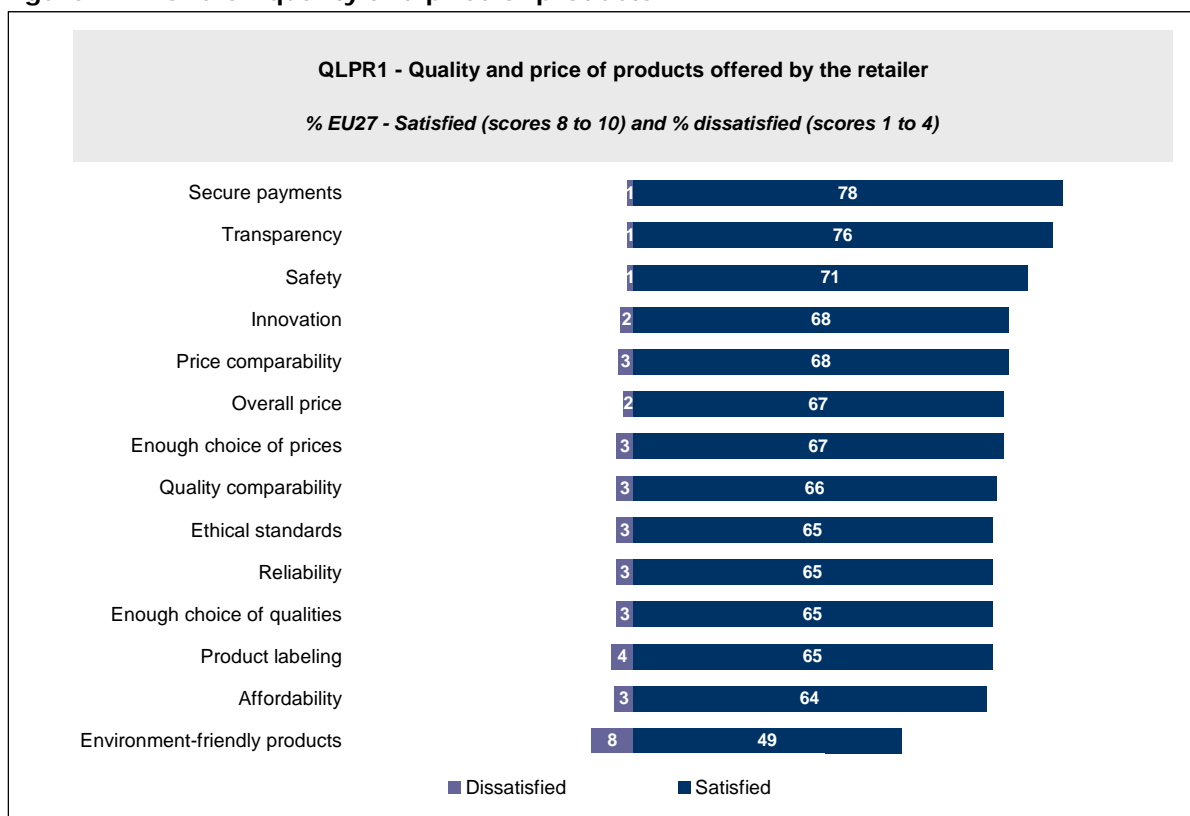
Women tend to be slightly more satisfied than men when it comes to evaluate the market for clothing and footwear. Satisfaction tends again to increase with the age. The least satisfied are to be found among those who finished full-time education before the age of 16, students and unemployed.

Chapter 3 – Detailed results

1. Quality and price of products

1.1. OVERALL RESULTS

Figure 12 – Overall quality and price of products



Speaking of quality and prices of clothing and footwear offered by their retailer, more 7 consumers in 10 said they were particularly satisfied with:

- Modes of payments i.e. the retailer offers easy and safe ways to pay for clothing and footwear (78% satisfied)
- Price transparency i.e. prices are clear and accurate so that consumers know exactly what they are going to pay, before they buy the product (76% satisfied)
- Safety of products (71% satisfied).

On the other hand, only 49% of consumers think their retailer offers environment-friendly products.

1.2. DIFFERENCES BY DISTRIBUTION CHANNEL

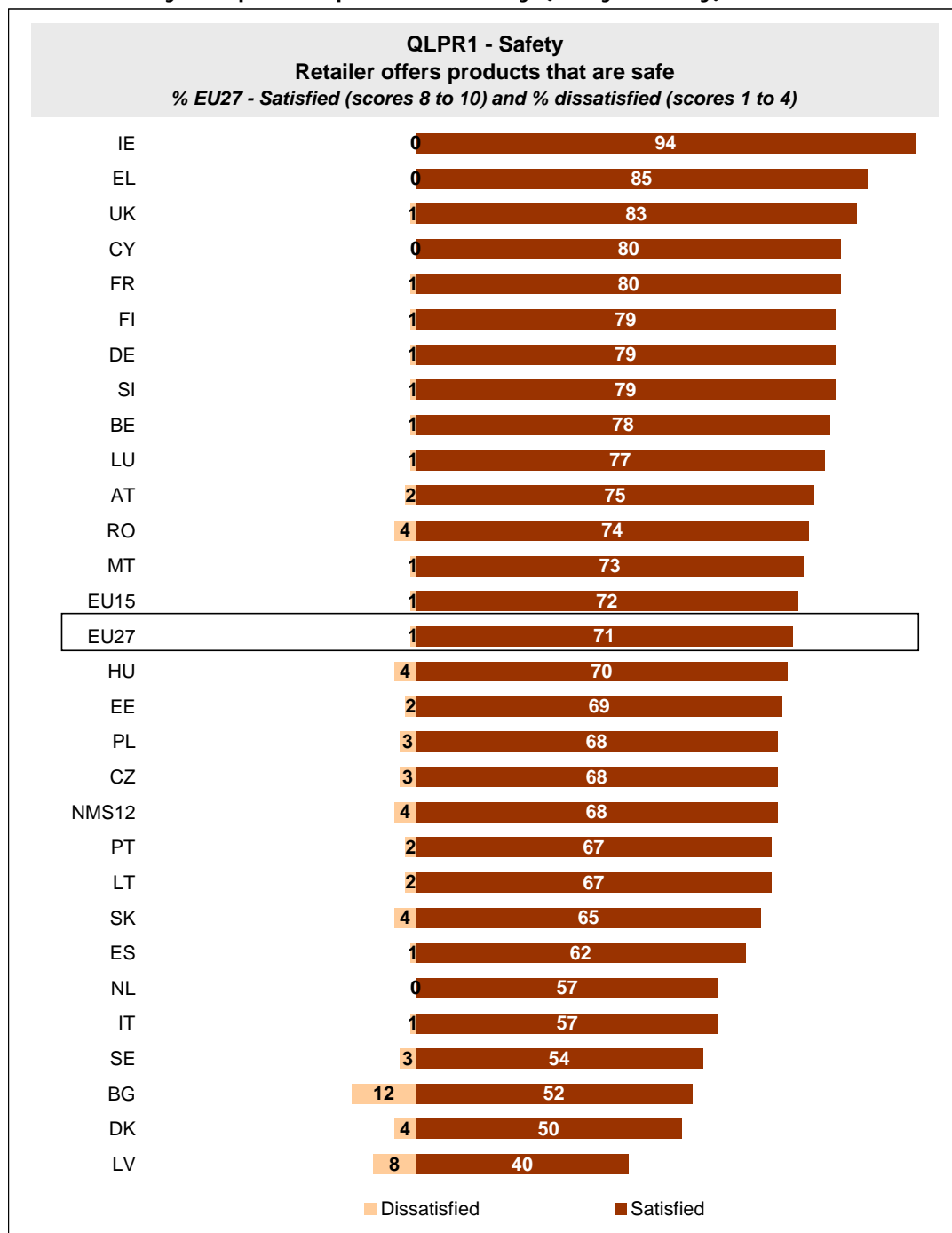
Consumers who purchased clothing and footwear in discount stores (80%) are consistently among the most satisfied respondents across the variables while customers of street markets (57%) and of small stores/boutiques (59%) tend to be relatively dissatisfied with the price/quality aspect.

Elsewhere, those who purchased their clothing and footwear on the Internet tend to be more satisfied than the average European consumers across the variables (74% against an EU average of 67%). It should, however, be kept in mind that the base at the EU level is small and these results should be considered as indicative.

1.3. DIFFERENCES BETWEEN EU MEMBER STATES

A) SAFETY

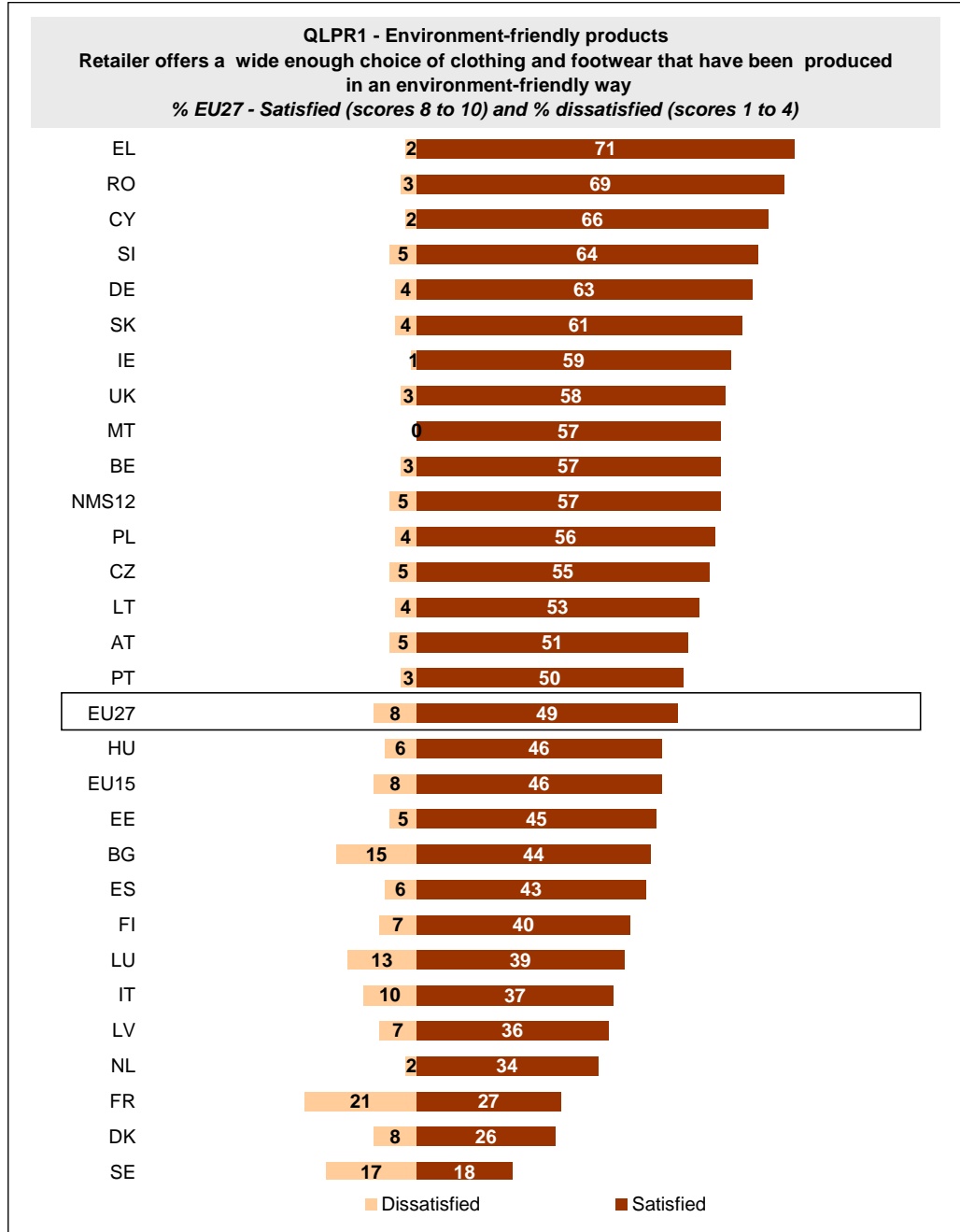
Figure 13 – Quality and price of products: Safety (% by country)



In all but one EU Member States, a majority of consumers believe that clothing and footwear offered by their retailer are safe. This is particularly the case of Irish people (94% satisfied consumers). On the other end of the spectrum, only 40% of Latvians think so. In addition, 8% of them are dissatisfied and 12% of Bulgarians share the same feeling (against an EU average of 1%).

B) ENVIRONMENT-FRIENDLY PRODUCTS

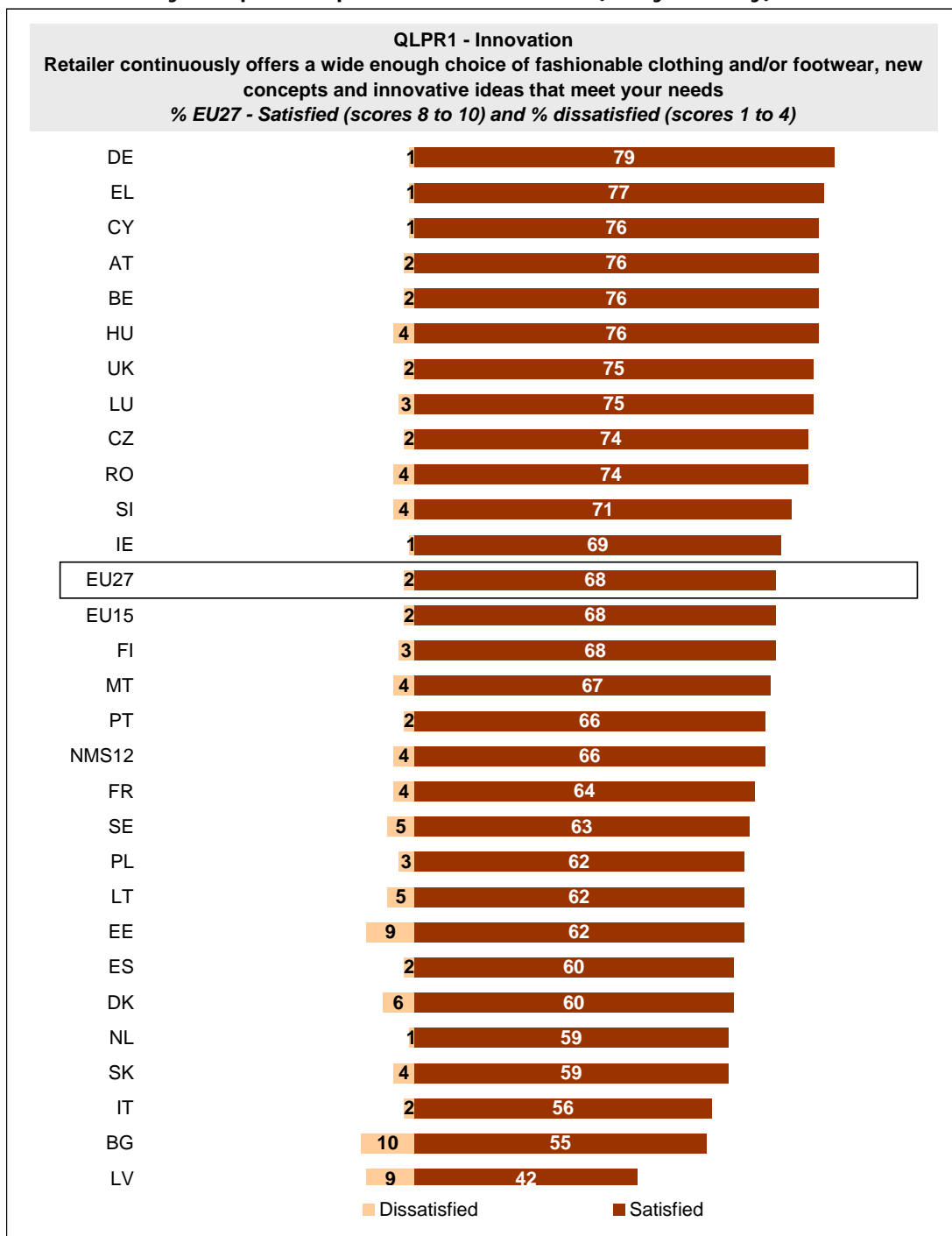
Figure 14 – Quality and price of products: Environment-friendly products (% by country)



Only in Greece more than 7 EU consumers in 10 are satisfied with the supply of clothing and footwear that have been produced in an environment-friendly way. Conversely, only 18% of Swedes, 26% of Danes and 27% of French are satisfied with the way clothing and footwear is produced. To a lesser extent, this is also the case in the Netherlands, Latvia, Italy, Luxembourg and Finland (40% and less). High proportions of dissatisfied consumers can also be observed in France (21%), Sweden (17%), Bulgaria and Luxembourg (13%, against an EU average of 8%). It is also important to note the high proportion of people who could not answer the question (“don’t know”), compared to an EU average of 15%, in Sweden (43%), Denmark (42%), Estonia (34%), Hungary (32%) and Luxembourg (31%).

C) INNOVATION

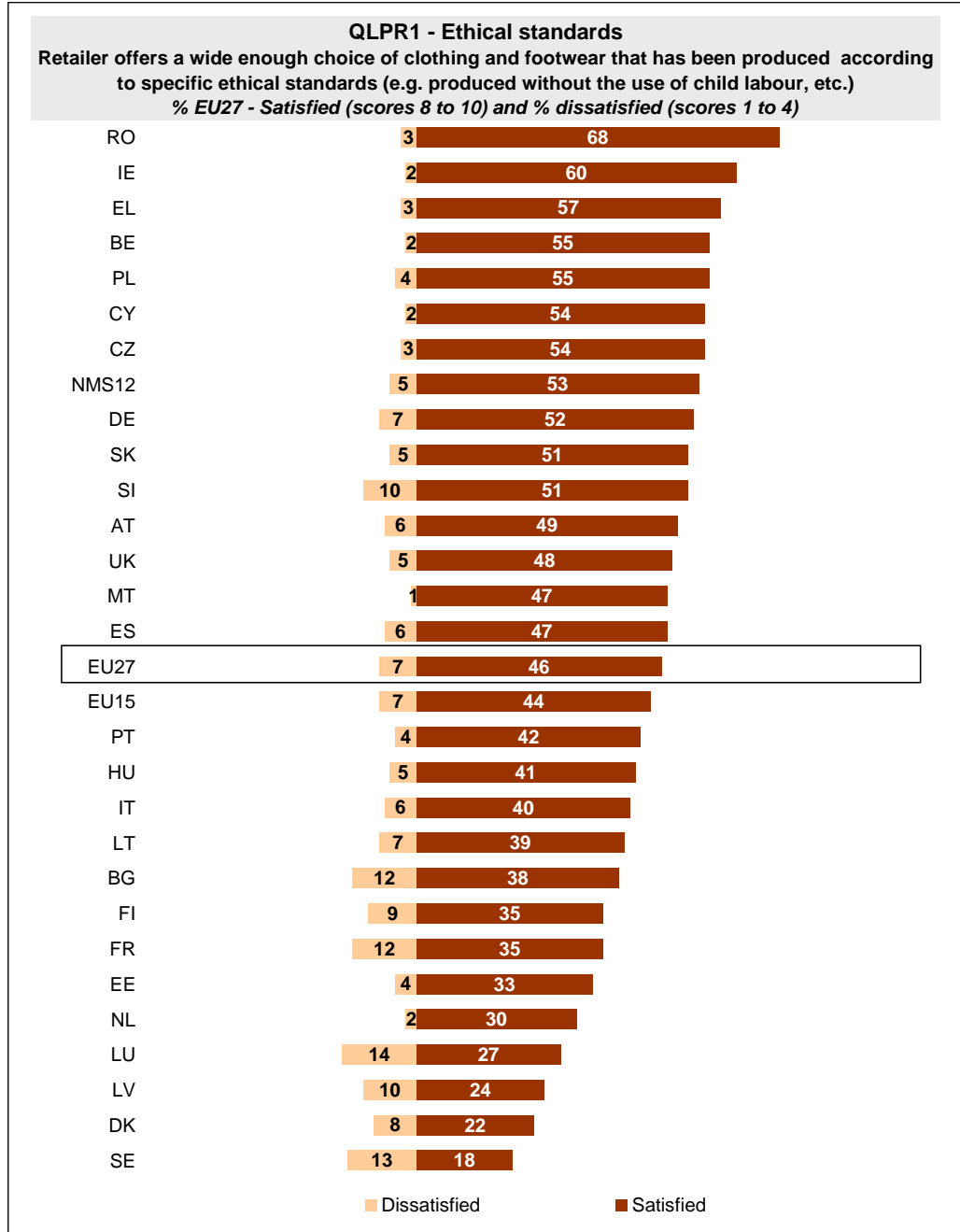
Figure 15 – Quality and price of products: Innovation (% by country)



German and Greek consumers are very satisfied (respectively 79% and 77% satisfied consumers) with the choice of technologically advanced clothing and footwear offered by their retailer. In turn, less than half of Latvian consumers (42%) are satisfied with their retailer's innovation and less than 6 in 10 Bulgarians, Italians, Slovaks and Dutch people are of this view. It is also interesting to note that, if the EU average of dissatisfied consumers only reaches 2.4%, there are 10% of Bulgarians and 9% of Latvians and of Estonians who are dissatisfied with the innovation offered by their retailer.

D) ETHICAL STANDARDS

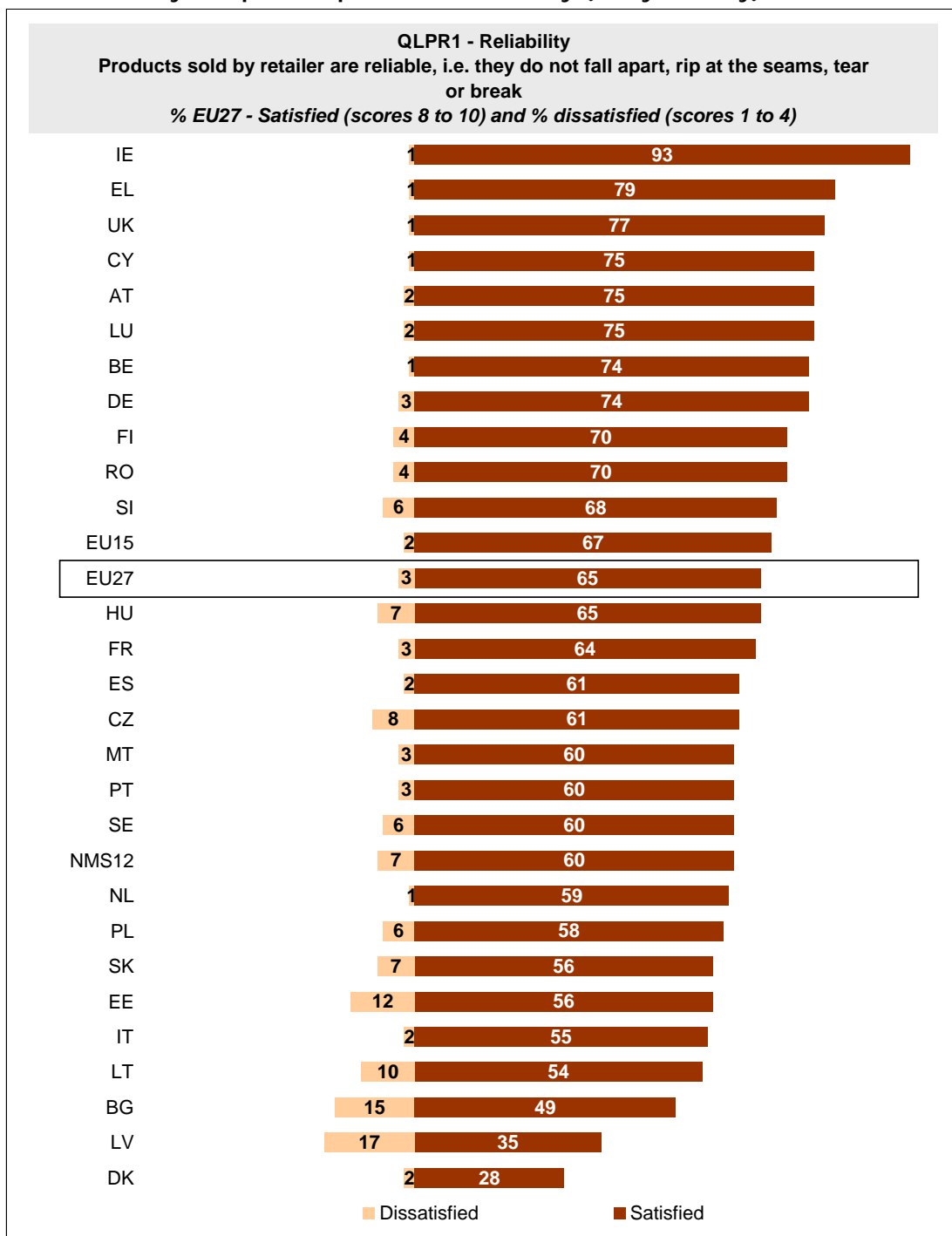
Figure 16 – Quality and price of products: Ethical standards (% by country)



Satisfaction with the availability of products that are produced according to certain ethical standards varies strongly between countries. Indeed, satisfied consumers are only 18% in Sweden, 22% in Denmark, 24% in Latvia and 27% in Luxembourg, whereas in Romania and in Ireland there are 68% and 60% respectively of the consumers that are satisfied. The highest levels of dissatisfaction are registered in Luxembourg (14%), Sweden (13%), Bulgaria and France (12% each). Furthermore, an important proportion of consumers across the EU had difficulties evaluating their retailer on this criterion. In particular, we find high levels of “don’t know” answers (compared to an EU average of 19%) in Denmark (52%), Estonia (51%), Sweden (49%), Hungary (41%), Luxembourg (43%), Malta, Lithuania (36% each), Latvia (33%) and the Netherlands (32%).

E) RELIABILITY

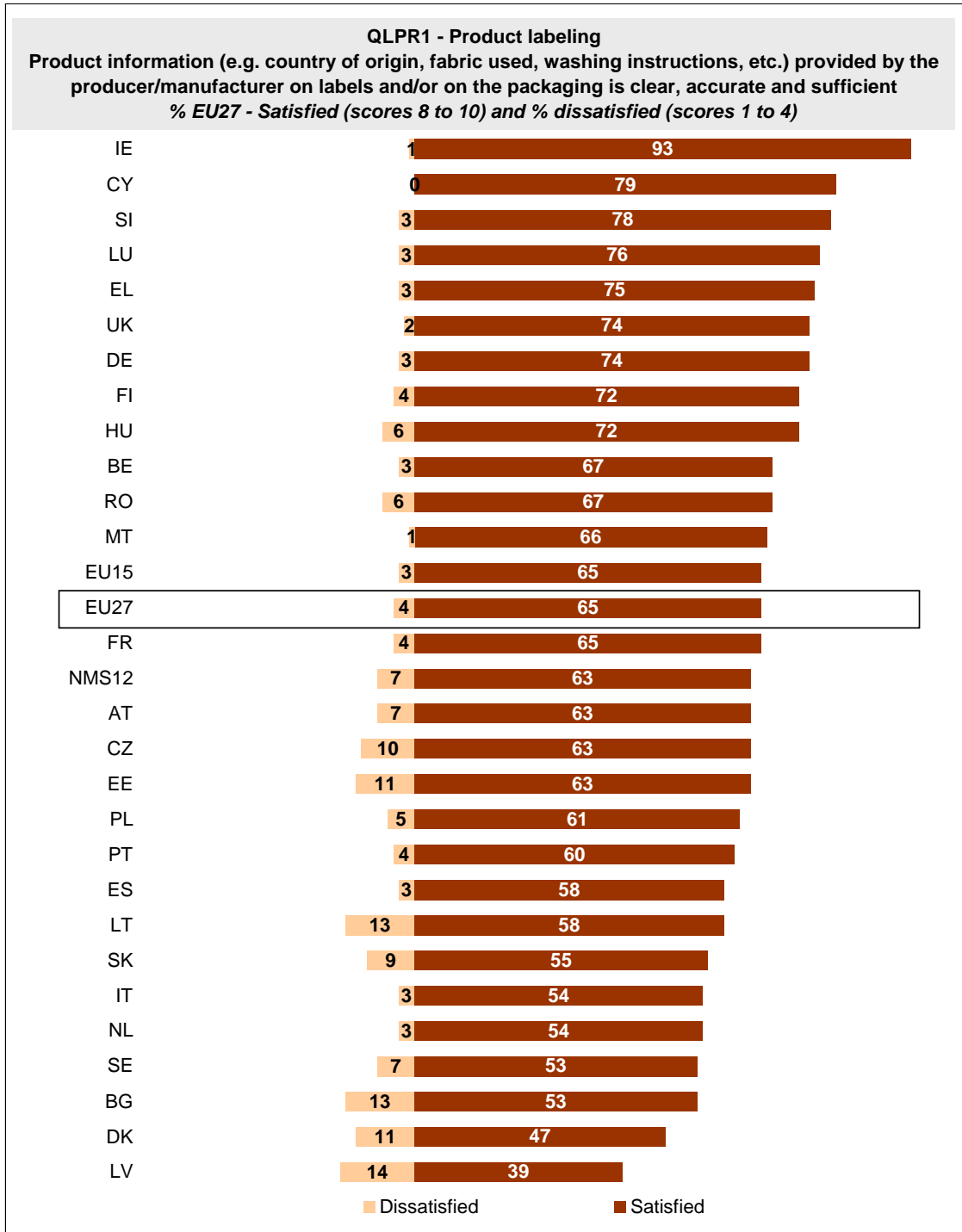
Figure 17 – Quality and price of products: Reliability (% by country)



More than 9 Irish consumers in 10 (against an EU average of 65%) are satisfied with the reliability of their retailer's products. On the other side of the spectrum, only 28% in Denmark and 35% in Latvia thought this to be the case. The low proportion of satisfied Danes can be explained by the great share of "don't know" (63% against an EU average of 1%). It is also interesting to note some relatively high proportions of dissatisfied consumers (compared to an EU average of 4%): 17% of Latvians, 15% of Bulgarians, 12% of Estonians and 10% of Lithuanians.

F) PRODUCT LABELING

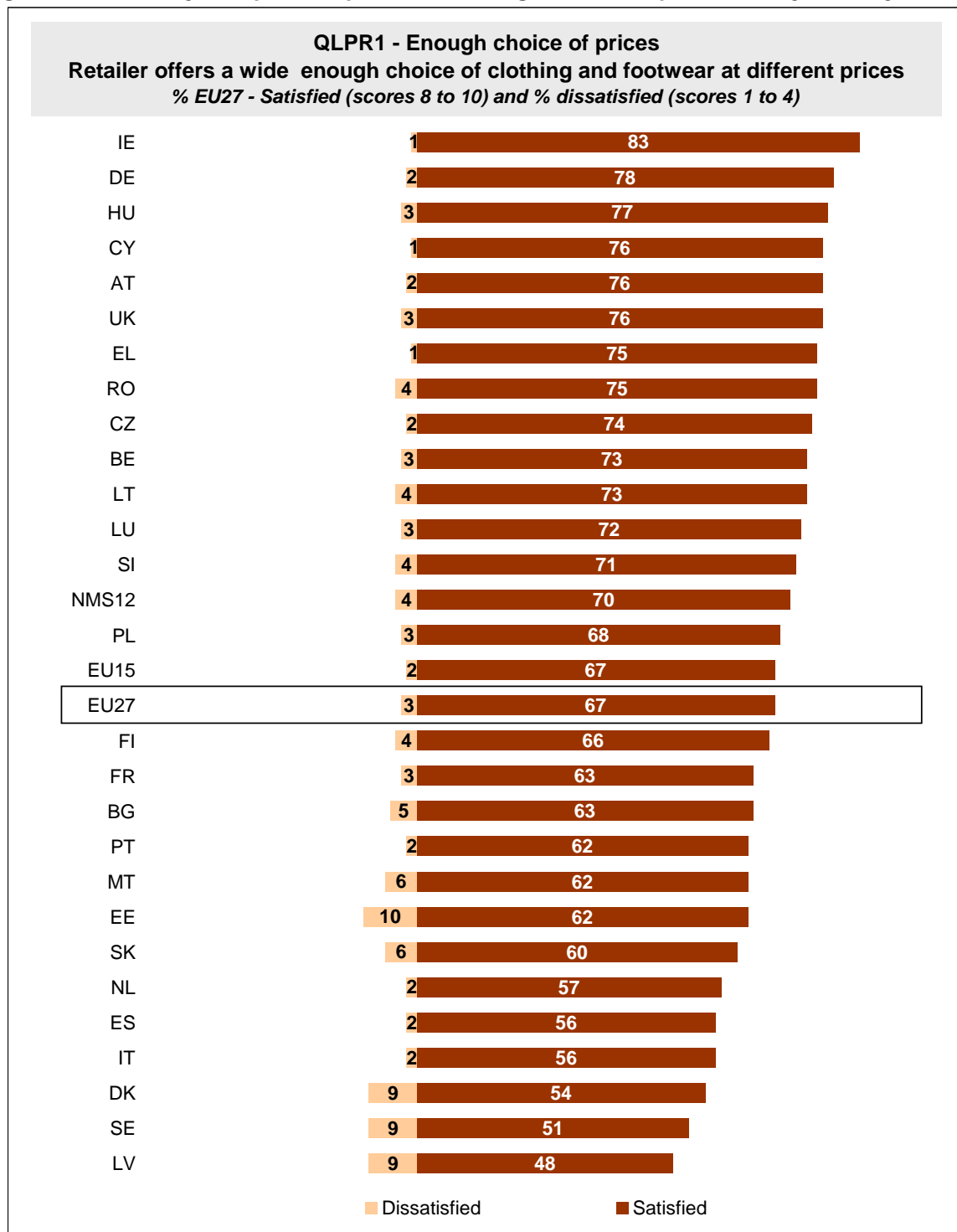
Figure 18 – Quality and price of products: Product labeling (% by country)



65% of consumers in the EU27 are satisfied with the product labeling provided by the producer/manufacturer. The most satisfied are by far Irish people (93%) whereas the least satisfied are found in Latvia (39%) and in Denmark (47%). High proportions of dissatisfied consumers are found in Latvia (14%), Bulgaria and Lithuania (13% each).

G) ENOUGH CHOICE OF PRICES

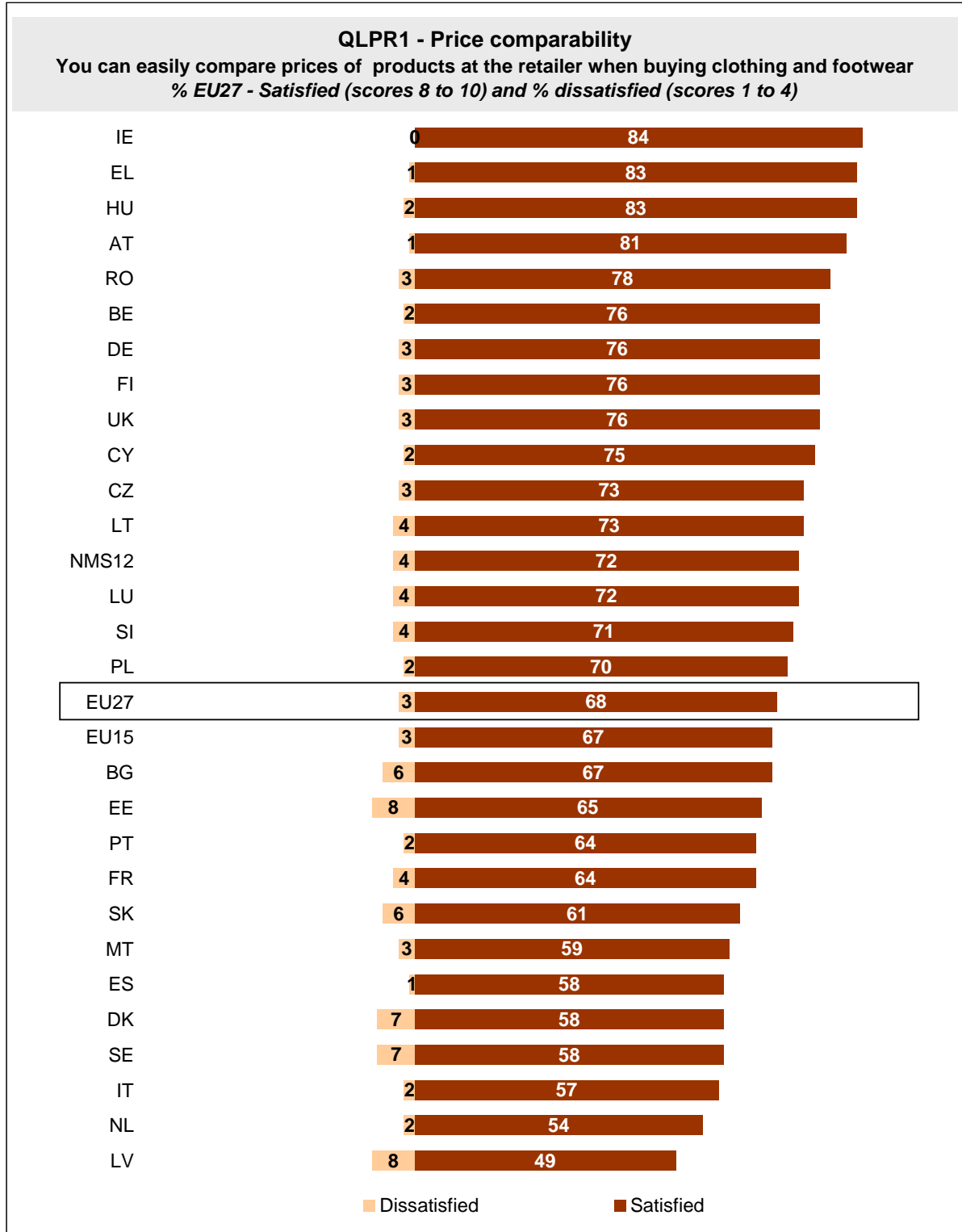
Figure 19 – Quality and price of products: enough choice of prices (% by country)



Whereas more than 8 Irish consumers in 10 (against an EU average of 67%) are satisfied with the choice of prices offered by their retailer, there are only 48% in Latvia. The number of dissatisfied consumers is rather low: except Estonia (10%), Denmark, Sweden and Latvia (9% each), there are never more than 6% of dissatisfied consumers (and an EU average of 3%).

H) PRICE COMPARABILITY

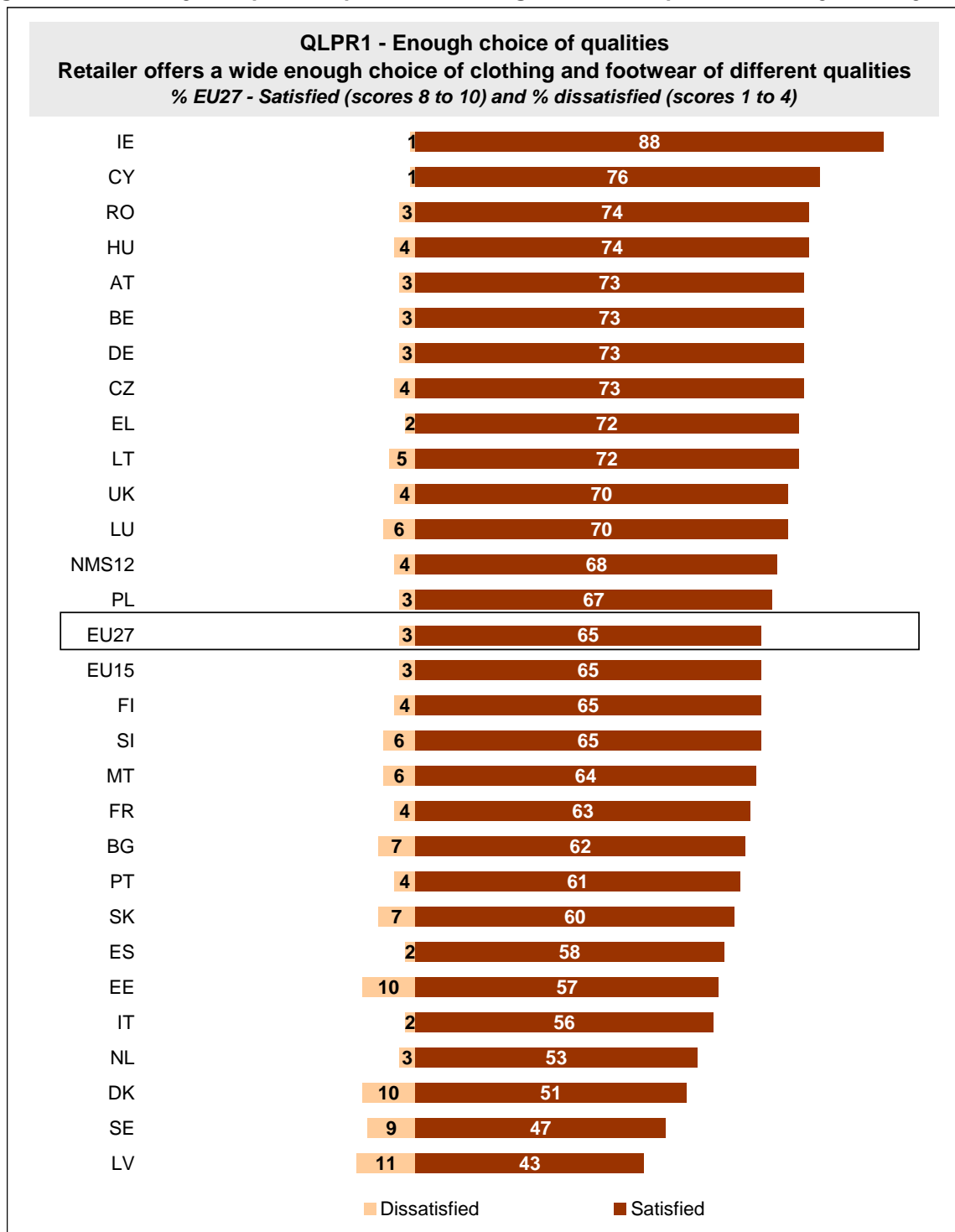
Figure 20 – Quality and price of products: price comparability (% by country)



In almost all EU Member States, a majority of consumers are satisfied when it comes to price comparability. The most satisfied consumers are found in Ireland, Greece, Hungary and Austria (more than 80%) whereas the least satisfied are found in Latvia (49%), the Netherlands (54%) and Italy (57%).

I) ENOUGH CHOICE OF QUALITIES

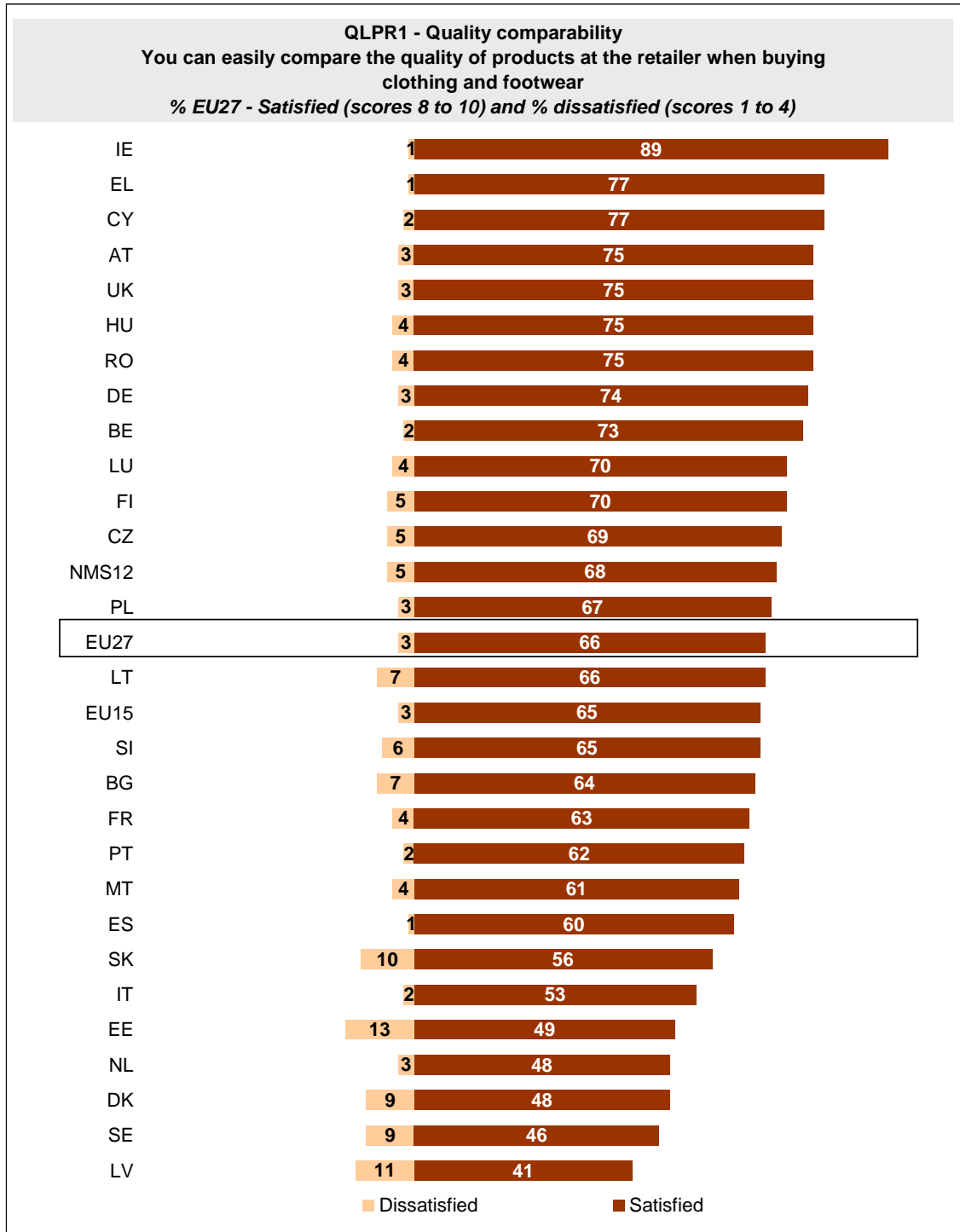
Figure 21 – Quality and price of products: enough choice of qualities (% by country)



Irish consumers are by far the most satisfied with the choice of qualities offered by their retailer (88% against an EU average of 65%). As previously observed, the least satisfied consumers are to be found in Latvia (43%), Sweden (47%), Denmark (51%) and the Netherlands (53%). Compared to an EU average of 3%, high dissatisfaction rates are observed in Latvia (11%), Denmark, Estonia (10% each) and Sweden (9%).

J) QUALITY COMPARABILITY

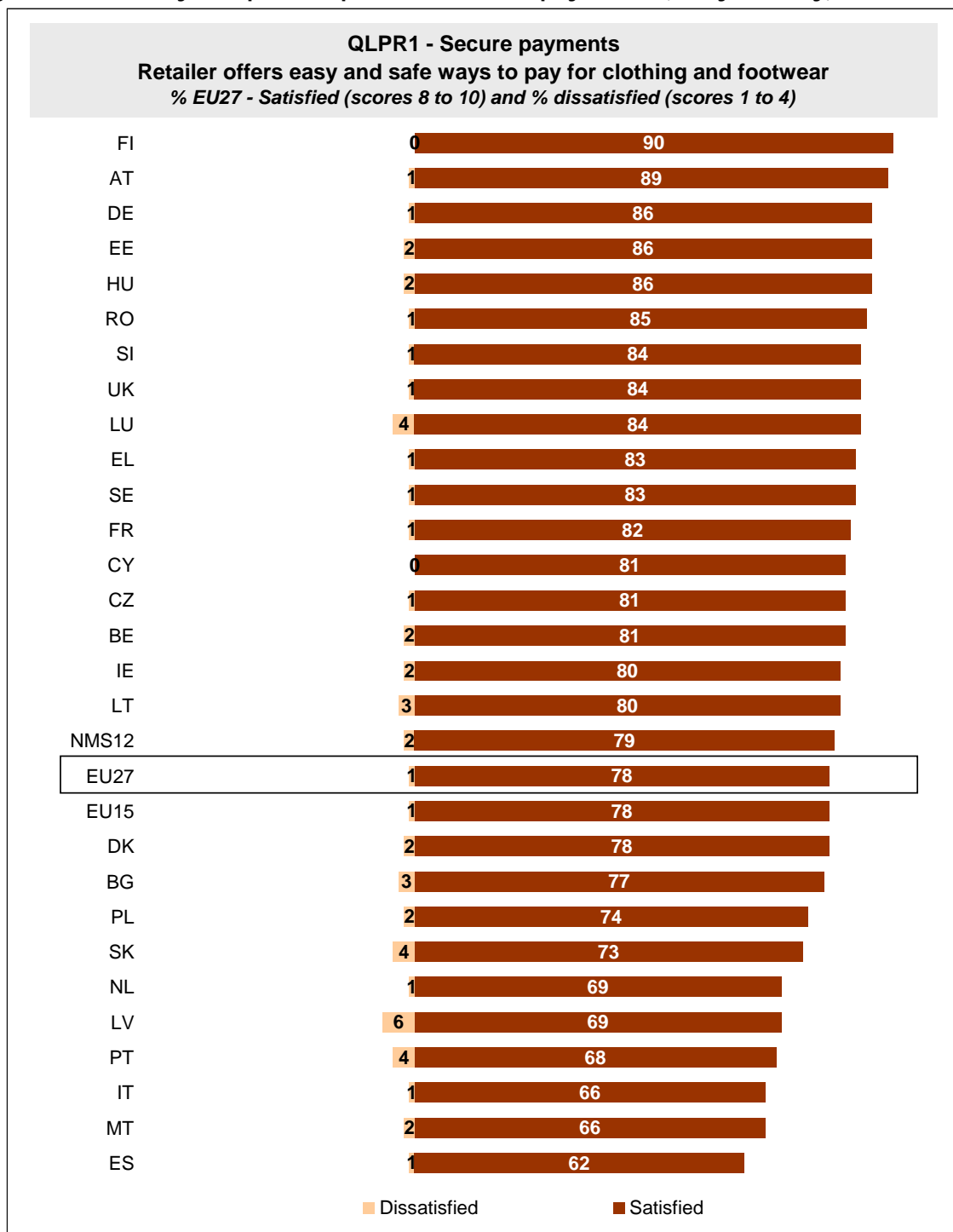
Figure 22 – Quality and price of products: quality comparability (% by country)



The absolute majority of consumers in every country is satisfied when it comes to quality comparability, except in Latvia (41%), Sweden (46%), Denmark, the Netherlands (48% each) and Estonia (49%). The most satisfied consumers are again found in Ireland (89%). It is also interesting to note the relatively high proportion of dissatisfied consumers (compared to an EU average of 3%) in Estonia (13%), Latvia (11%), Slovakia (10%), Denmark and Sweden (9% each).

K) SECURE PAYMENTS

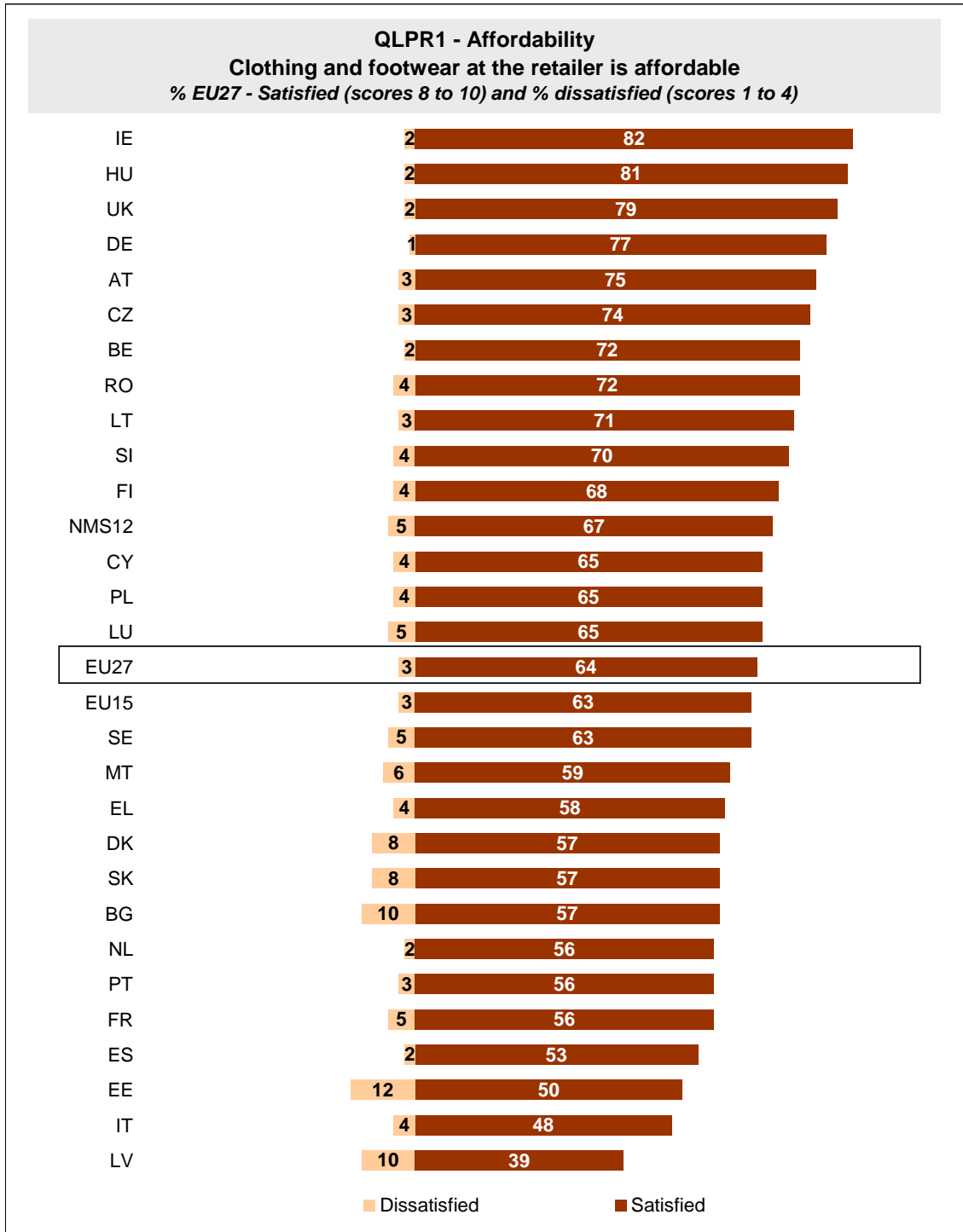
Figure 23 – Quality and price of products: secure payments (% by country)



In every EU Member State, at least 6 consumers in 10 are satisfied with the modes of payments offered by their retailer. The most satisfied respondents are found in Finland and Austria, while Spaniards, Maltese, Italians, Portuguese, Latvians and Dutch people expressed the lowest levels of satisfaction.

L) AFFORDABILITY

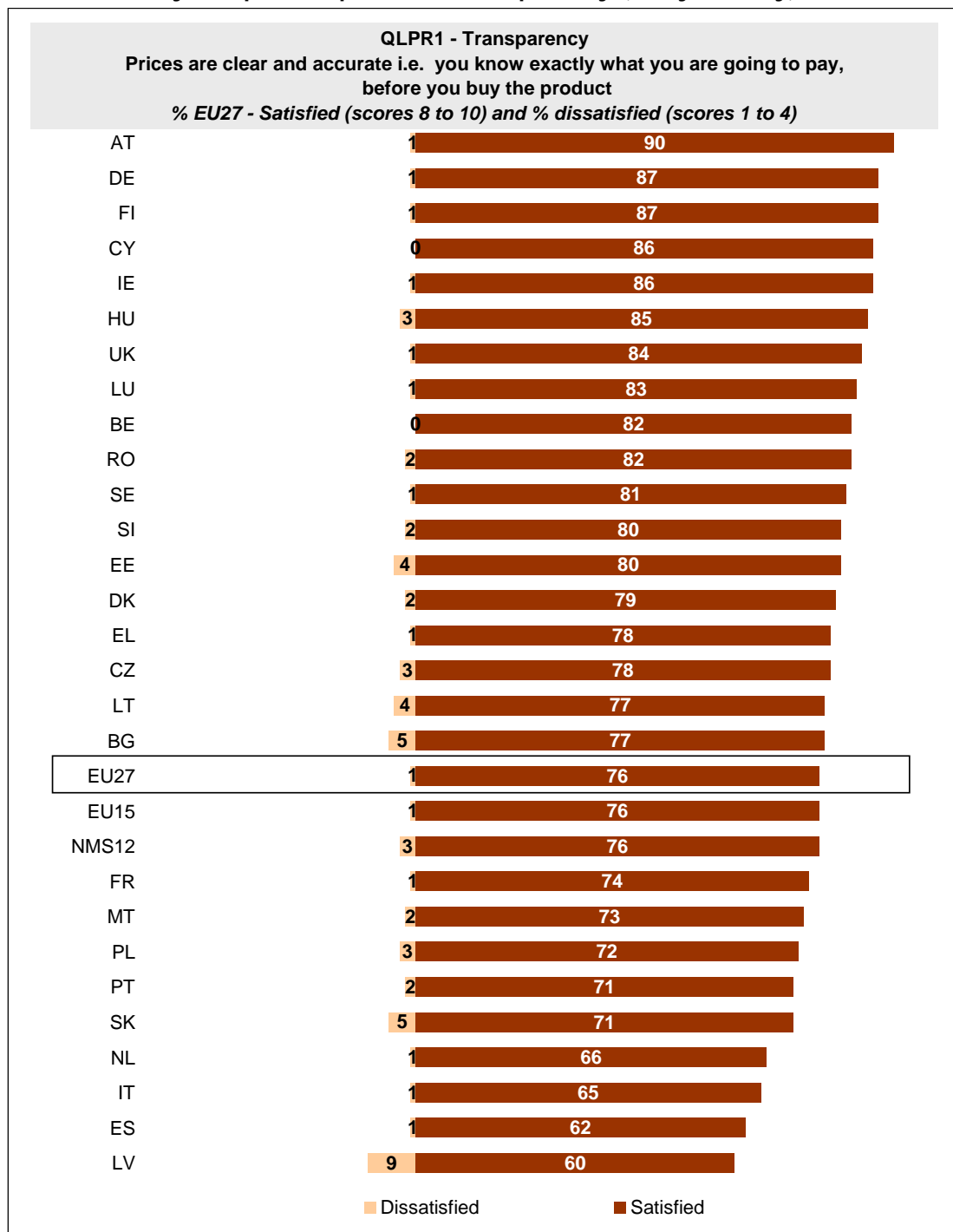
Figure 24 – Quality and price of products: affordability (% by country)



Clothing and footwear is affordable for more than 8 consumers in 10 in Ireland and Hungary (against an EU average of 64%). On the other side of the spectrum, we find Latvia (39%), Italy (48%), Estonia (50%) and Spain (53%). High dissatisfaction rates can be observed in Estonia (12%), Latvia and Bulgaria (10%, against an EU average of 3%).

M) TRANSPARENCY

Figure 25 – Quality and price of products: transparency (% by country)

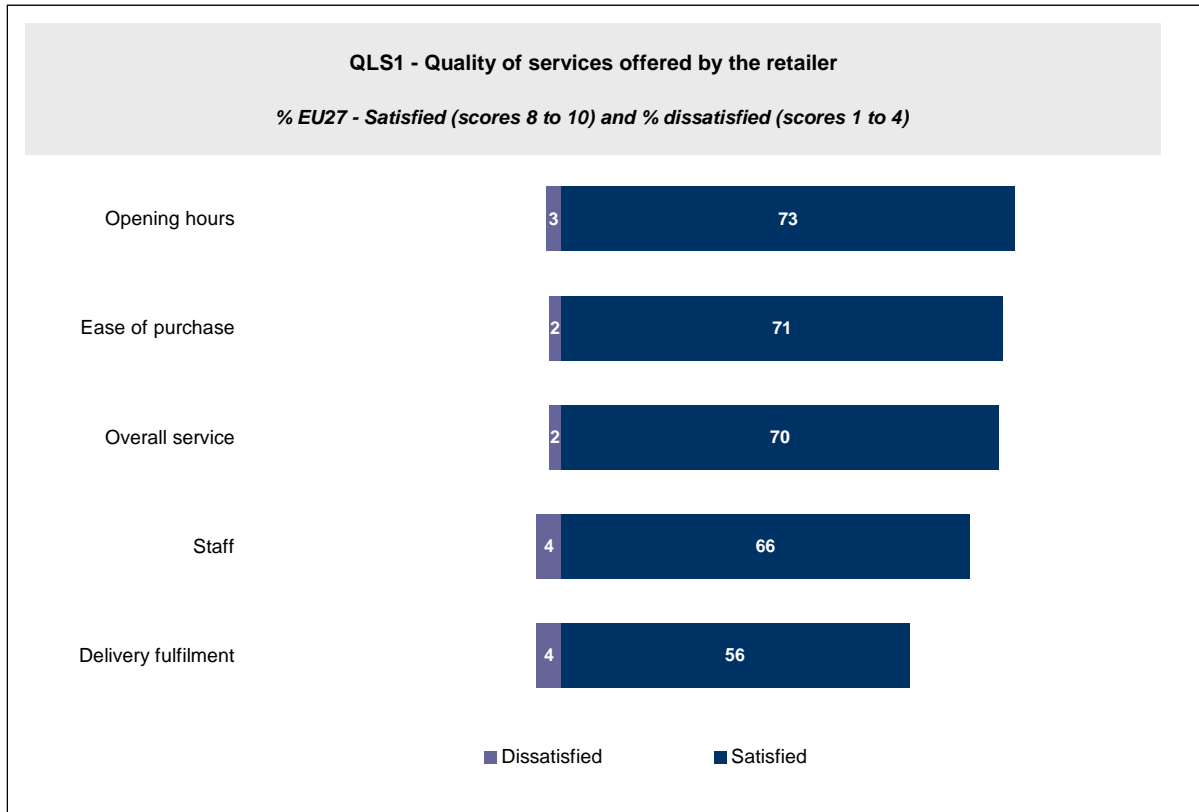


For more than 3 consumers in 4 in the EU, prices are clear and accurate. This is particularly the case for 90% of Austrian consumers. Latvians, Spaniards, Italians and Dutch people are at the bottom of the list, with less than 7 satisfied consumers in 10. Furthermore, it is interesting to note the low proportion of dissatisfied consumers across the countries (except Latvia, there are never more than 5% dissatisfied consumers and the EU average is of only 1%).

2. Quality of services

2.1. OVERALL RESULTS

Figure 26 – Quality of services



Overall, 7 consumers in 10 are satisfied with the quality of services offered by their retailer. The elements with which consumers are the most satisfied are:

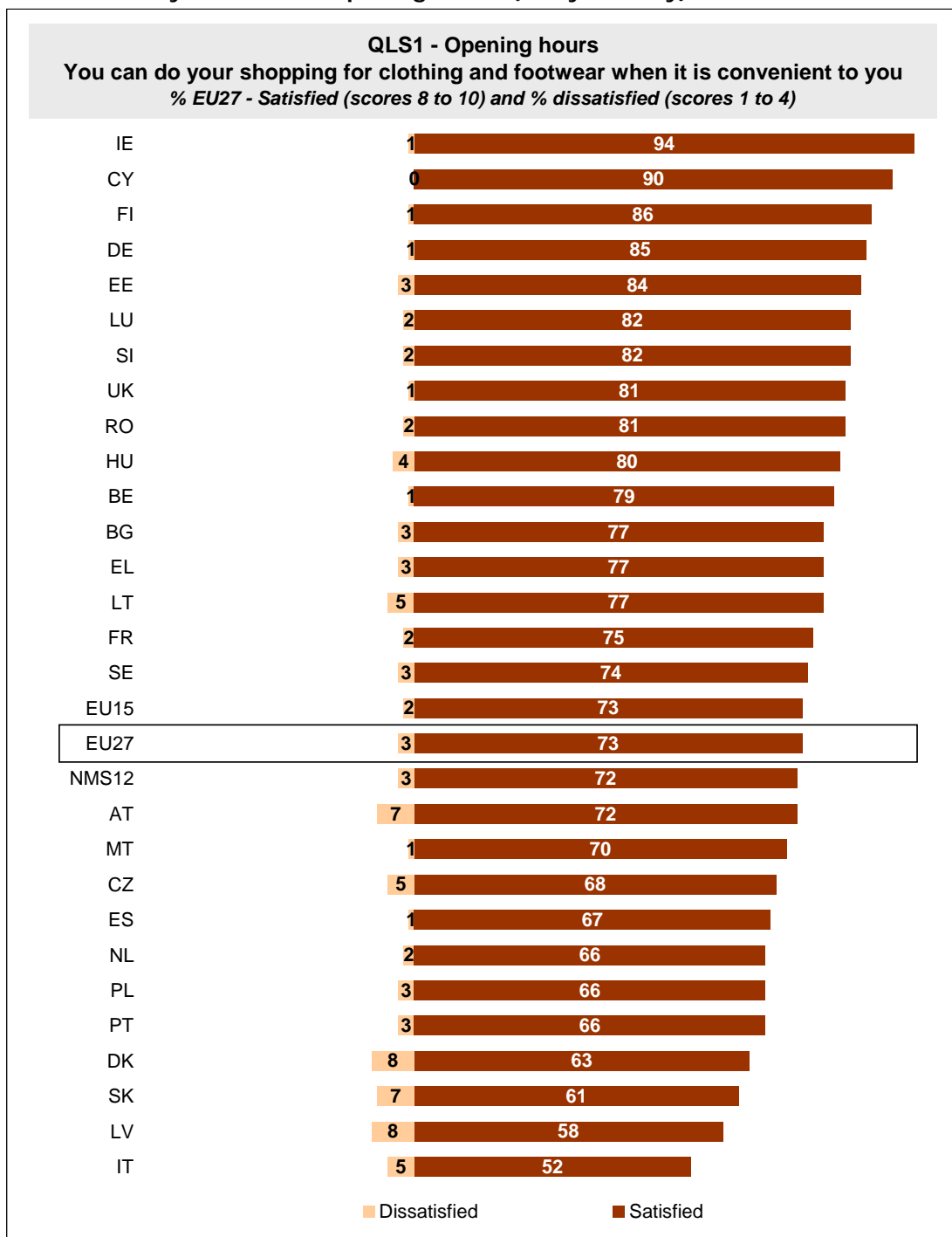
- Opening hours i.e. they can do their shopping for clothing and footwear when it is convenient for them (73% satisfied);
- Ease of purchase i.e. it is quick and easy to find the items they want at their retailer (71% satisfied).

On the other hand, only 56% of the European customers are satisfied with the delivery of products ordered i.e. products are delivered according to the purchase order (they get the right product within the agreed deadline – whether they buy the goods at distance or at an actual shop). At the same time, very few people are dissatisfied with this element. A large share of consumers may not be delivered clothing and footwear. This would explain the high level of “don’t know” answers and consequently the relatively low proportion of satisfied people.

2.3. DIFFERENCES BETWEEN EU MEMBER STATES

A) OPENING HOURS

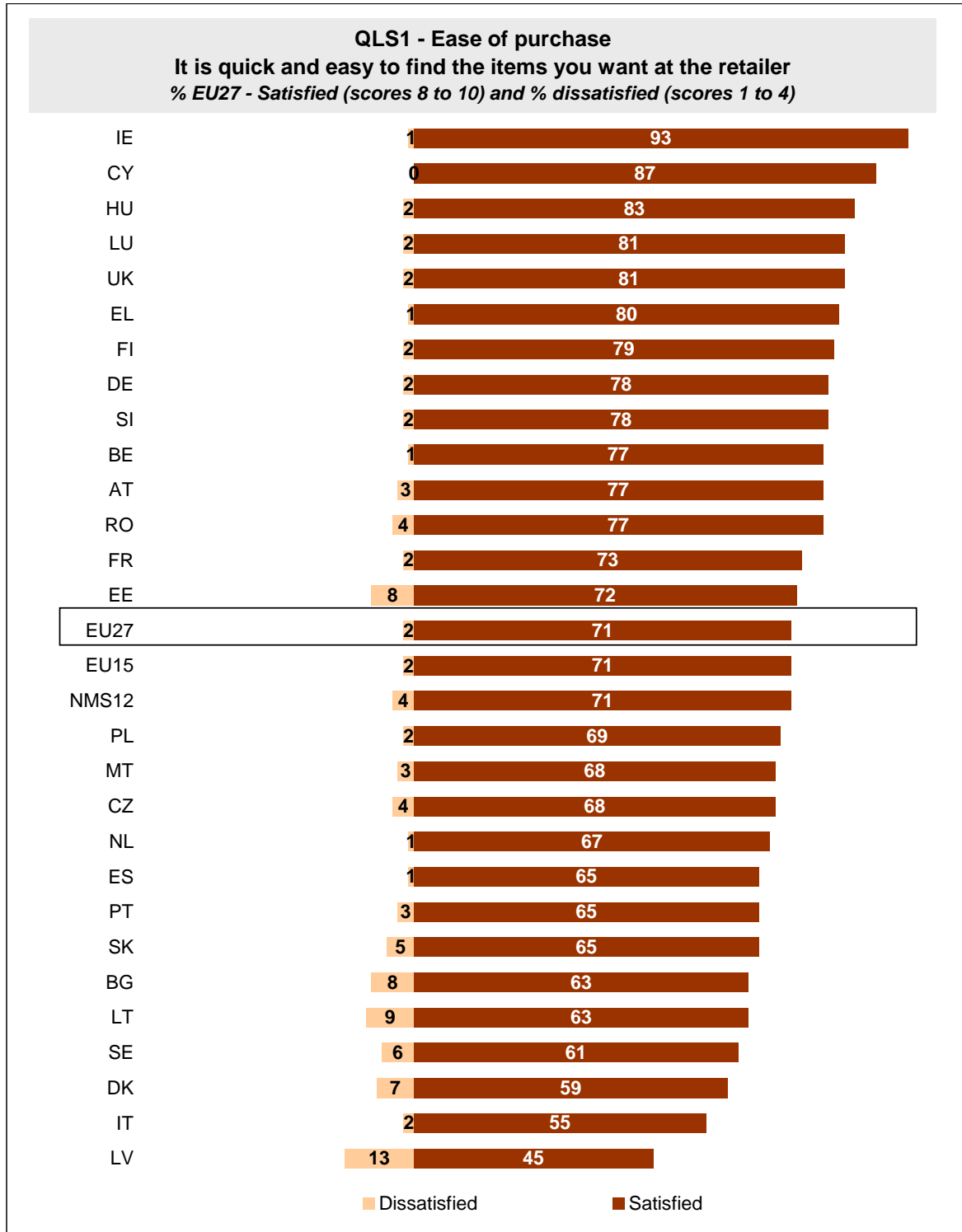
Figure 27 – Quality of services: opening hours (% by country)



In all EU Member States most people are satisfied with the opening hours of their retailer. 94% of Irish consumers and 90% of Cypriots say they can do their shopping whenever it is convenient for them. On the other hand, there are less than 60% of satisfied consumers in Italy and in Latvia. Again, dissatisfaction rates are modest across countries.

B) EASE OF PURCHASE

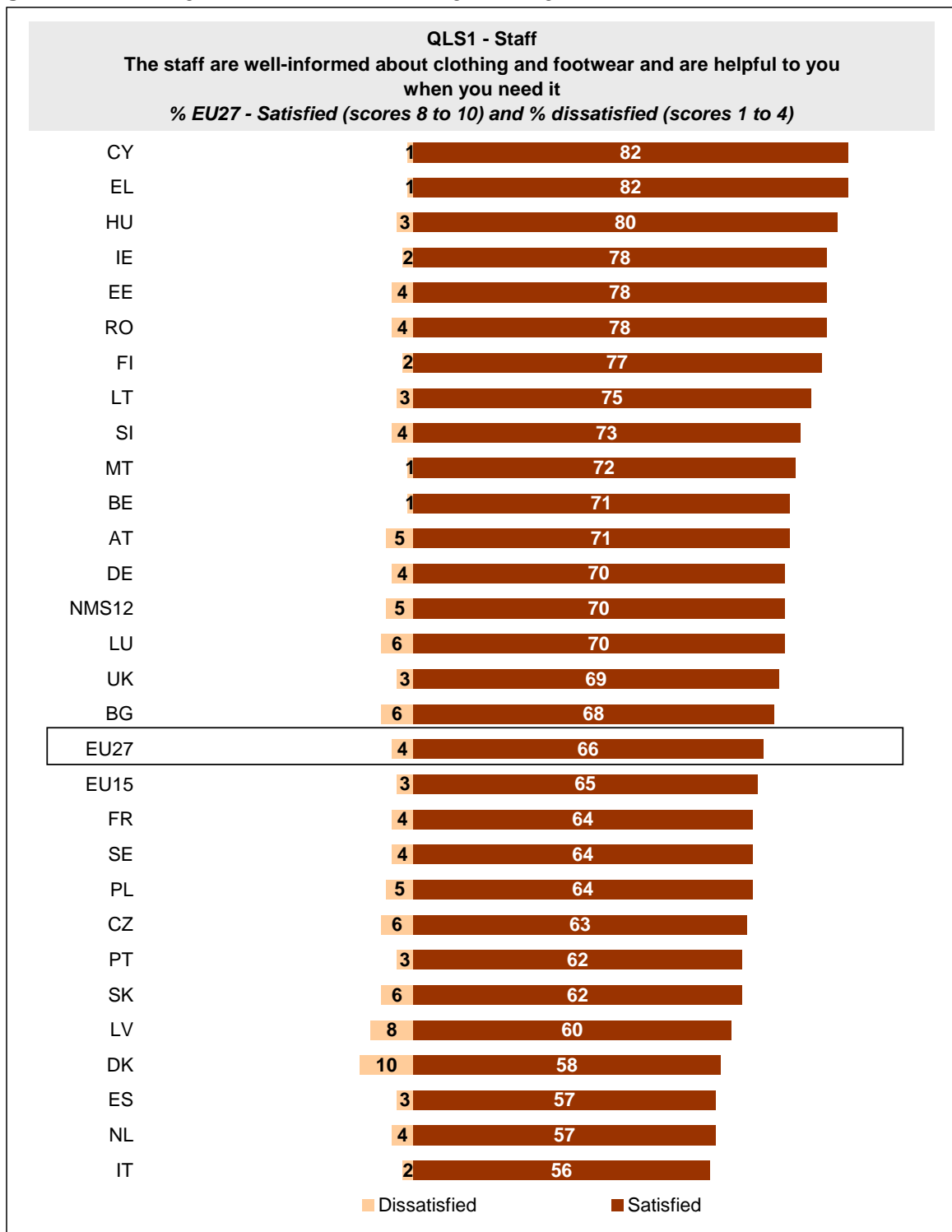
Figure 28 – Quality of services: ease of purchase (% by country)



In all but one EU countries, a majority of consumers thinks that it is quick and easy to find the product they want at their retailer. They are 93% of Irish consumers to share this view, whereas they are less than half to think so in Latvia (45%), where 13% of consumers are even dissatisfied.

C) STAFF

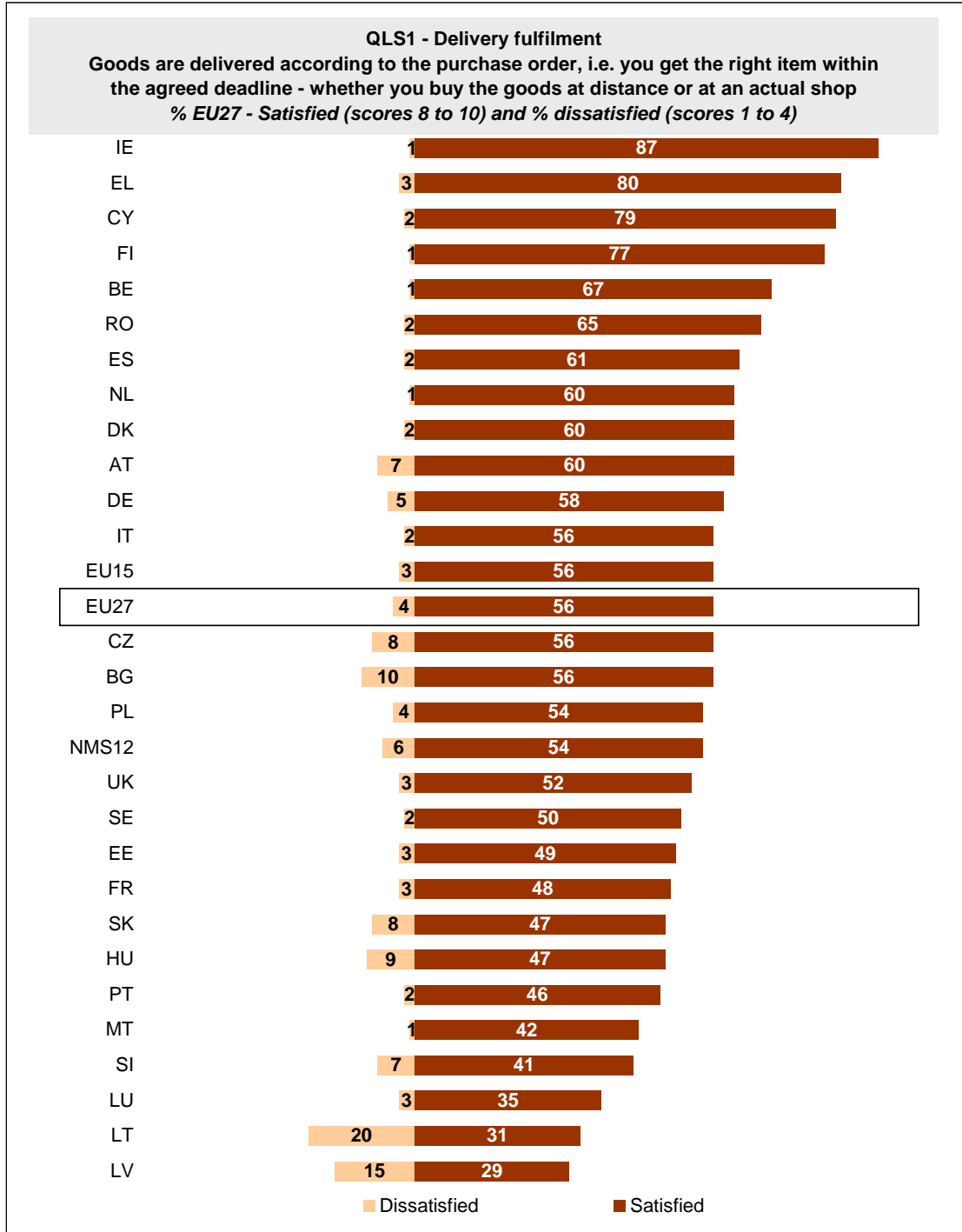
Figure 29 – Quality of services: staff (% by country)



Italy, the Netherlands, Spain and Denmark are the only countries where less than 60% of people are satisfied with their retailer's staff. On the other side of the spectrum, 82% of Cypriots and Greeks are satisfied with their retailer's staff. 10% of Danes are dissatisfied (against an EU average of 4%).

D) DELIVERY FULFILMENT

Figure 30 – Quality of services: delivery fulfillment (% by country)

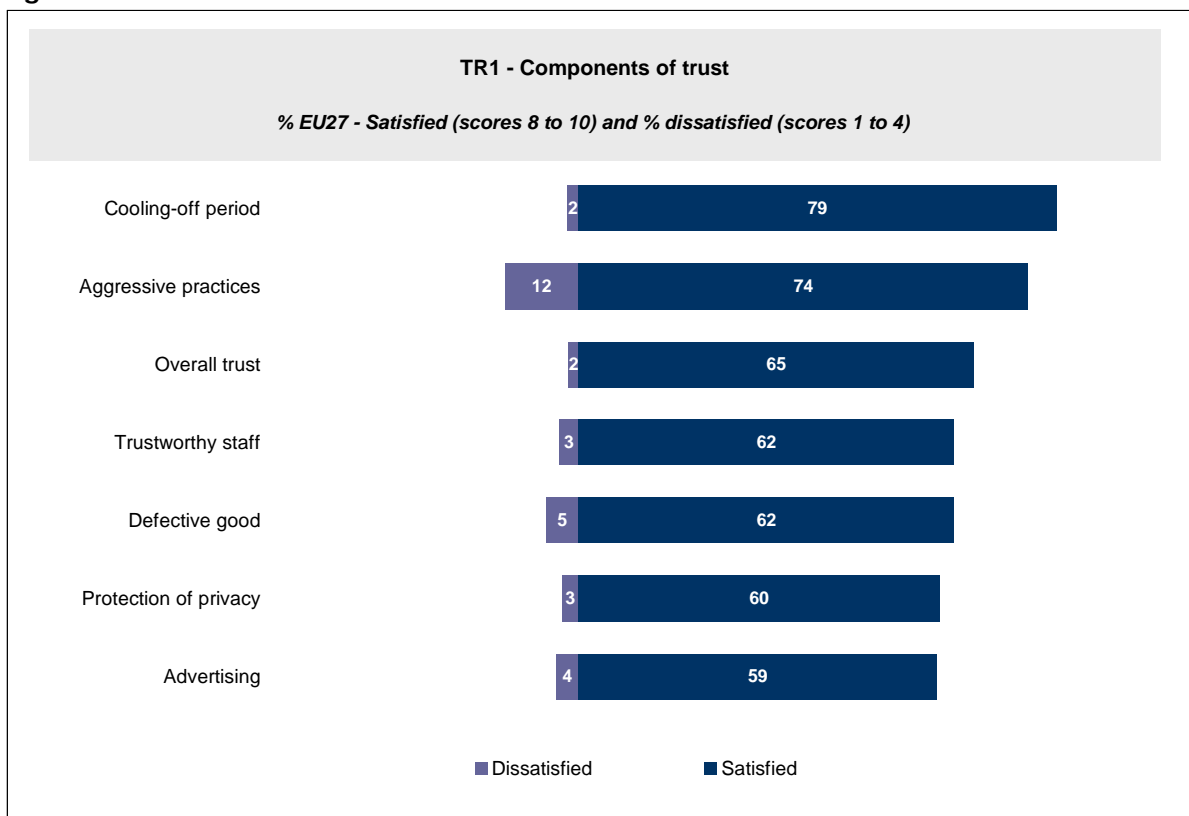


Big differences are observed when speaking of delivery of products according to the purchase order. High scores are obtained in Ireland (87%), Greece (80%), Cyprus (79%) and Finland (77%). At the other side of the spectrum, we find 29% of Latvians, 31% of Lithuanians, 35% of consumers in Luxembourg. One Lithuanian in five is dissatisfied. High “don’t know” rates are observed in Luxembourg (52%), Malta (44%), Estonia (41%), Lithuania (36%) and Latvia (35%). These results may be explained by the fact that delivery of clothing and footwear is not so common for consumers. They do not have enough experience.

3. Trust

3.1. OVERALL RESULTS

Figure 31 - Trust



Overall, 65% consumers in the EU27 trust their retailer when buying clothing and footwear. In particular, consumers think that their retailer does not resort to aggressive selling practices. Indeed, more than 7 consumers in 10 have not felt unduly coerced or pressurized buy their retailer to buy clothing and footwear. However, a significant proportion of consumers (12%) are dissatisfied with their retailer's selling practices.

Almost 80% of those who have bought clothing and footwear at distance (on the internet, through phone/mail order or from a sales representative at home) trust that their retailer would let them return the goods within the cooling-off period.

To a lesser extent, 62% of European consumers also think that their retailer's staff is trustworthy i.e. they do not provide them with information that deceives, misleads or omit relevant information. The same proportion trusts that their retailer would agree to replace, repair, reduce the price or give them their money back if the good was defective or not fit for purpose.

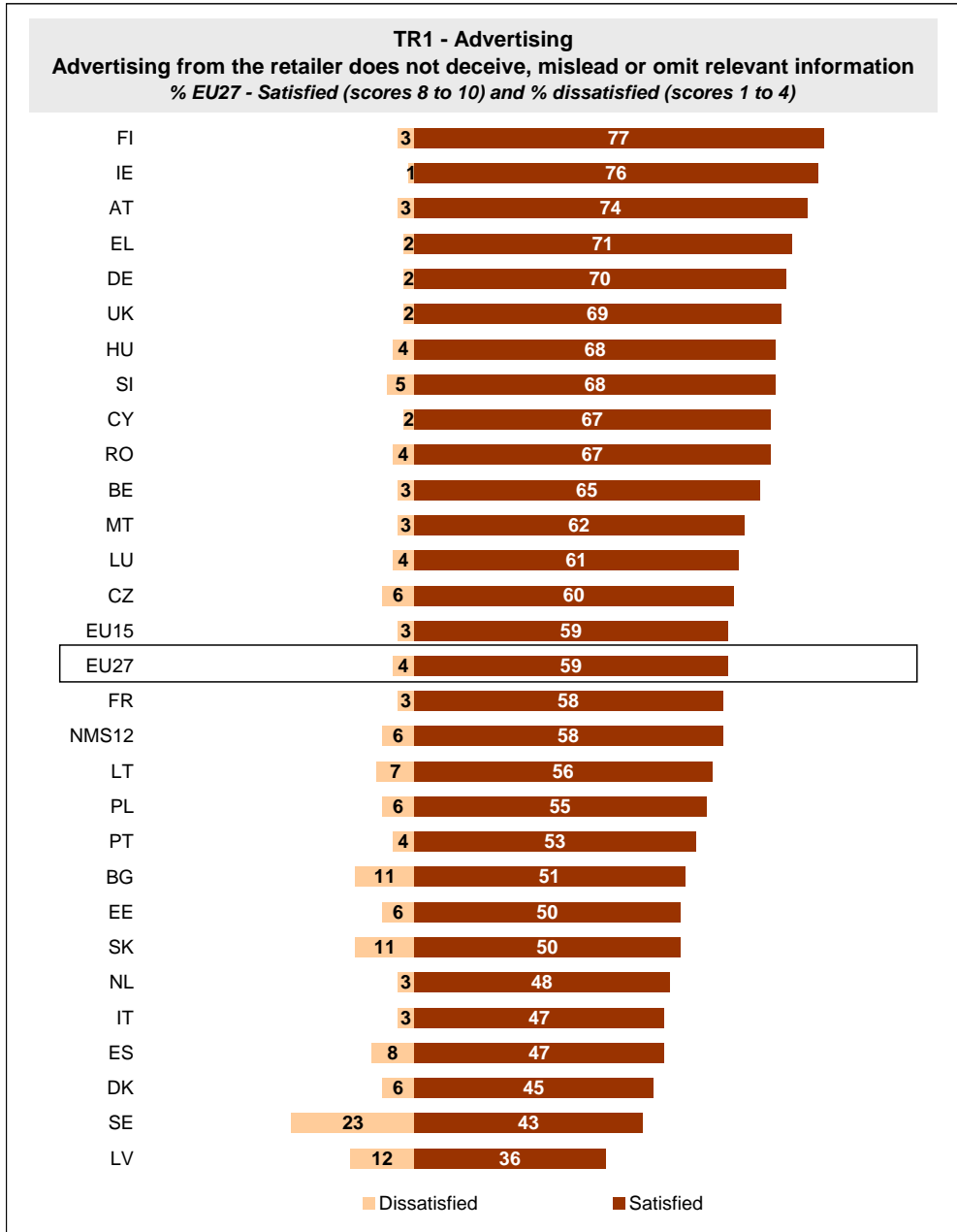
3.2. DIFFERENCES BY DISTRIBUTION CHANNEL

Consumers who purchase clothing and footwear in department stores are more likely than others to trust the staff. Those who buy these products in discount stores are the least satisfied with the staff and are more likely to think that their retailer has aggressive selling practices.

3.3. DIFFERENCES BETWEEN EU MEMBER STATES

A) ADVERTISING

Figure 32 – Trust: Advertising (% country)

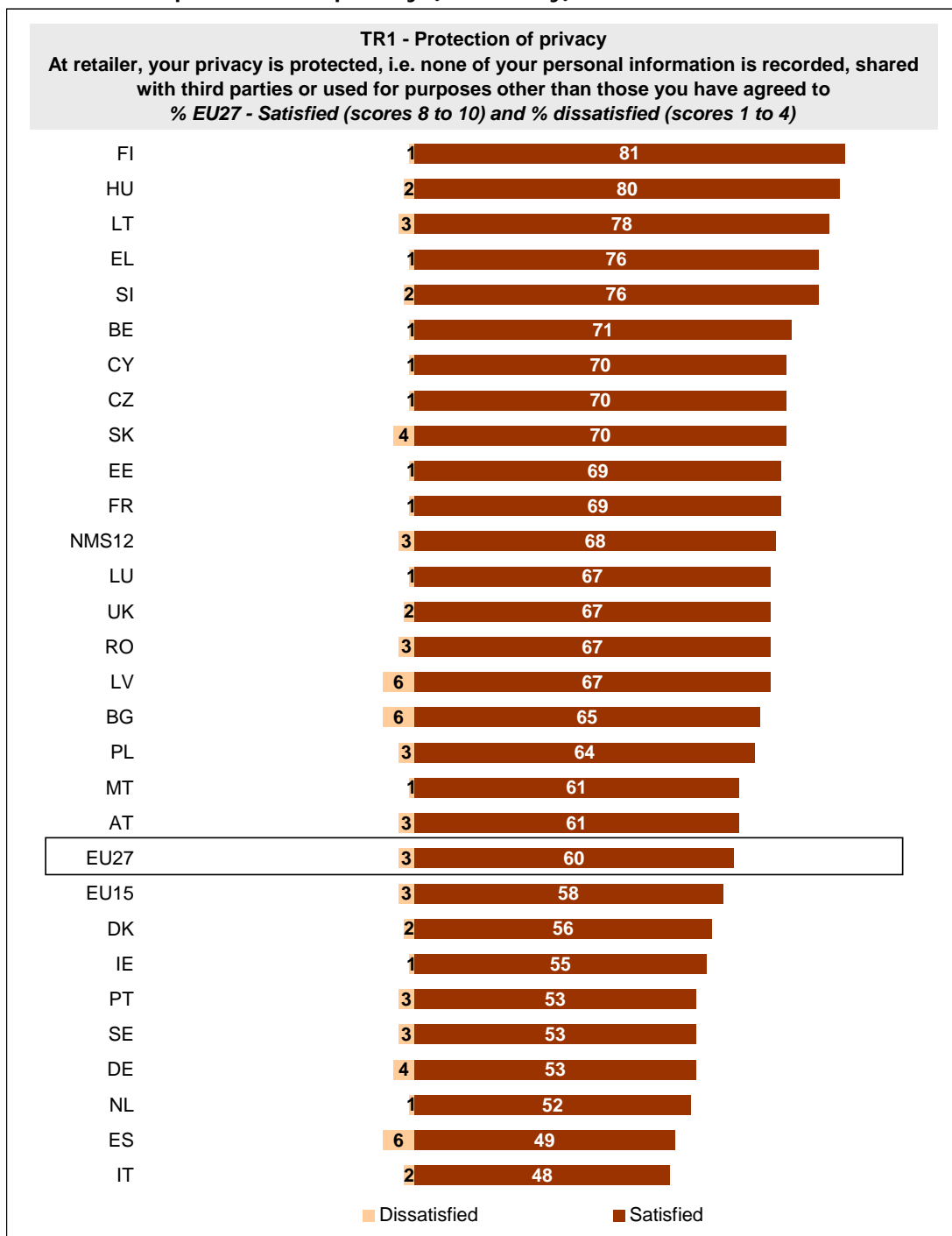


In general, EU consumers tend to think that advertising from their retailer does not deceive, mislead or omit relevant information. This is particularly the case of Finns (77%), Irish people (76%) and Austrians (74%). However, less than 50% of consumers think so in the Netherlands, Italy, Spain, Denmark, Sweden and Latvia. In addition, more than one fifth of Swedes is dissatisfied with the advertising from their retailer (against an EU average of 4%).

It is also interesting to note the relatively high proportion of “Don’t know” answers (compared to the EU average of 9%) in Estonia and in Denmark (24% each).

B) PROTECTION OF PRIVACY

Figure 33 – Trust: protection of privacy (% country)



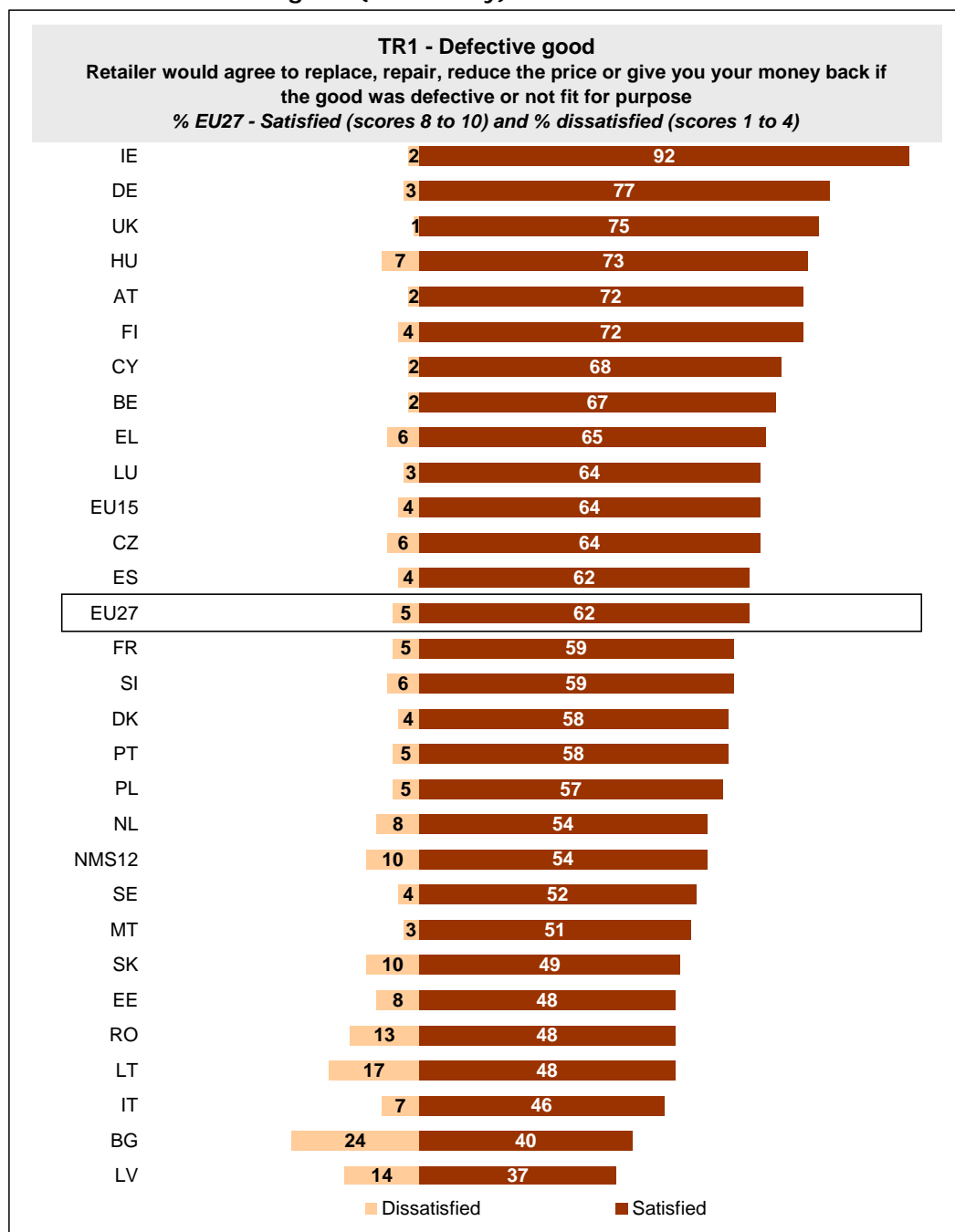
Overall, consumers are satisfied with the way their privacy is protected on the market for clothing and footwear. The only exceptions are Italy and Spain, where less than 50% are satisfied with the way their retailer uses their personal information. Conversely, more than three in four Finns, Hungarians, Lithuanians, Greeks and Slovenes share this opinion. Here again, although dissatisfied consumers are rare, we observe relatively high proportions of “Don’t know” answers: 13% at EU level, with peaks in Sweden (29%), Denmark (28%), Germany (24%) and Estonia (23%).

C) COOLING-OFF PERIOD

This question was only asked those who had purchased clothing and footwear at distance, i.e. via the Internet, by mail/phone order or from a sales representative at home. Consequently, the low sample sizes by country (<10 in most countries) do not allow further statistical analysis.

D) DEFECTIVE GOOD

Figure 34 – Trust: Defective good (% country)

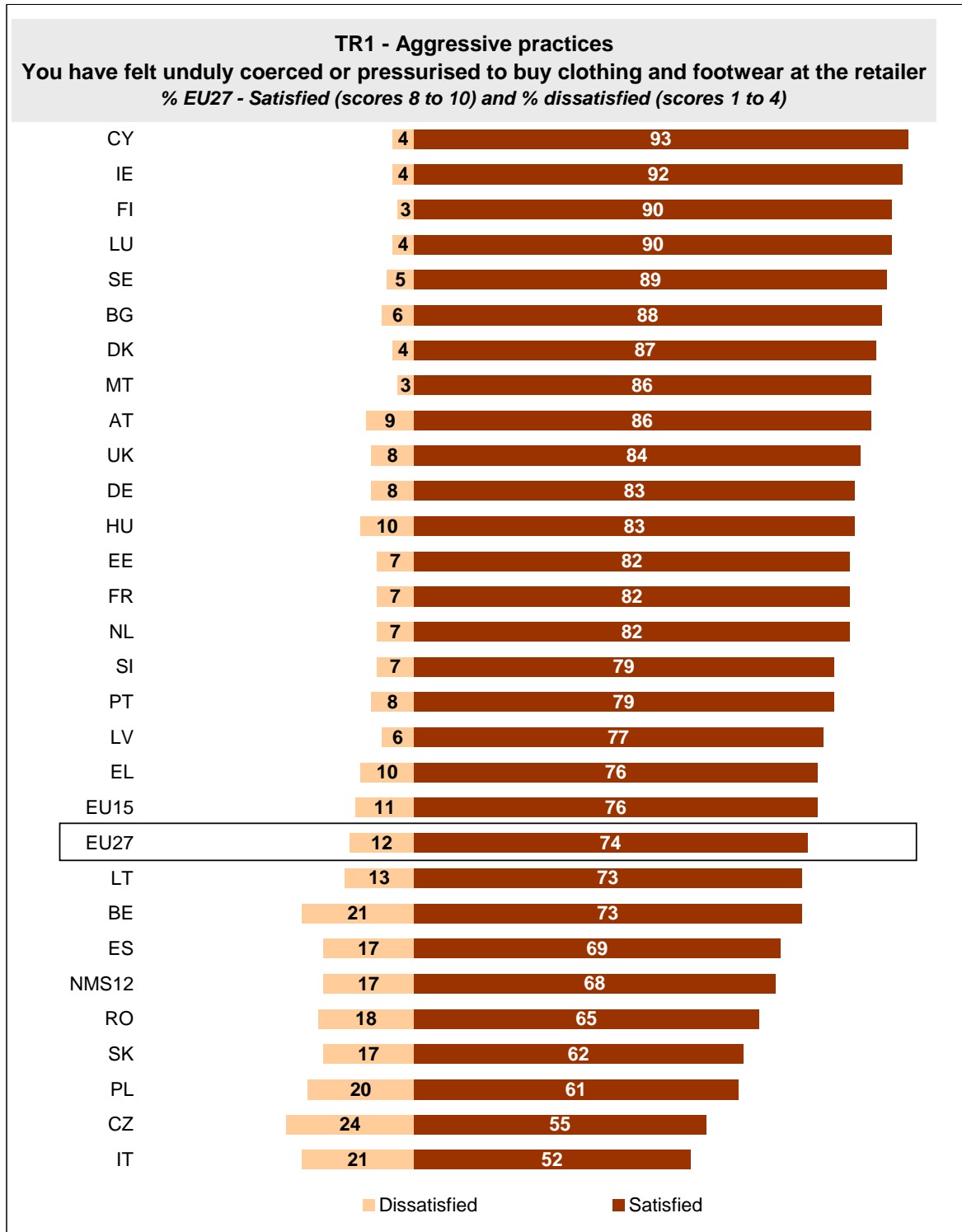


Overall, consumers trust that their retailer would agree to replace, repair, reduce the price or give them their money back if the good was defective or not fit for purpose, particularly Irish people (92%). However, this is only the case of 37% of Latvians, 40% of Bulgarians and less than 50% of Italians, Lithuanians, Romanians, Estonians and Slovaks.

Here again, we observe relatively high proportions of dissatisfied consumers (24% in Bulgaria) as well as "Don't know": compared to an EU average of 7%, peaks can be observed in Estonia (27%), Romania (25%) and Sweden (24%).

E) AGGRESSIVE PRACTICES

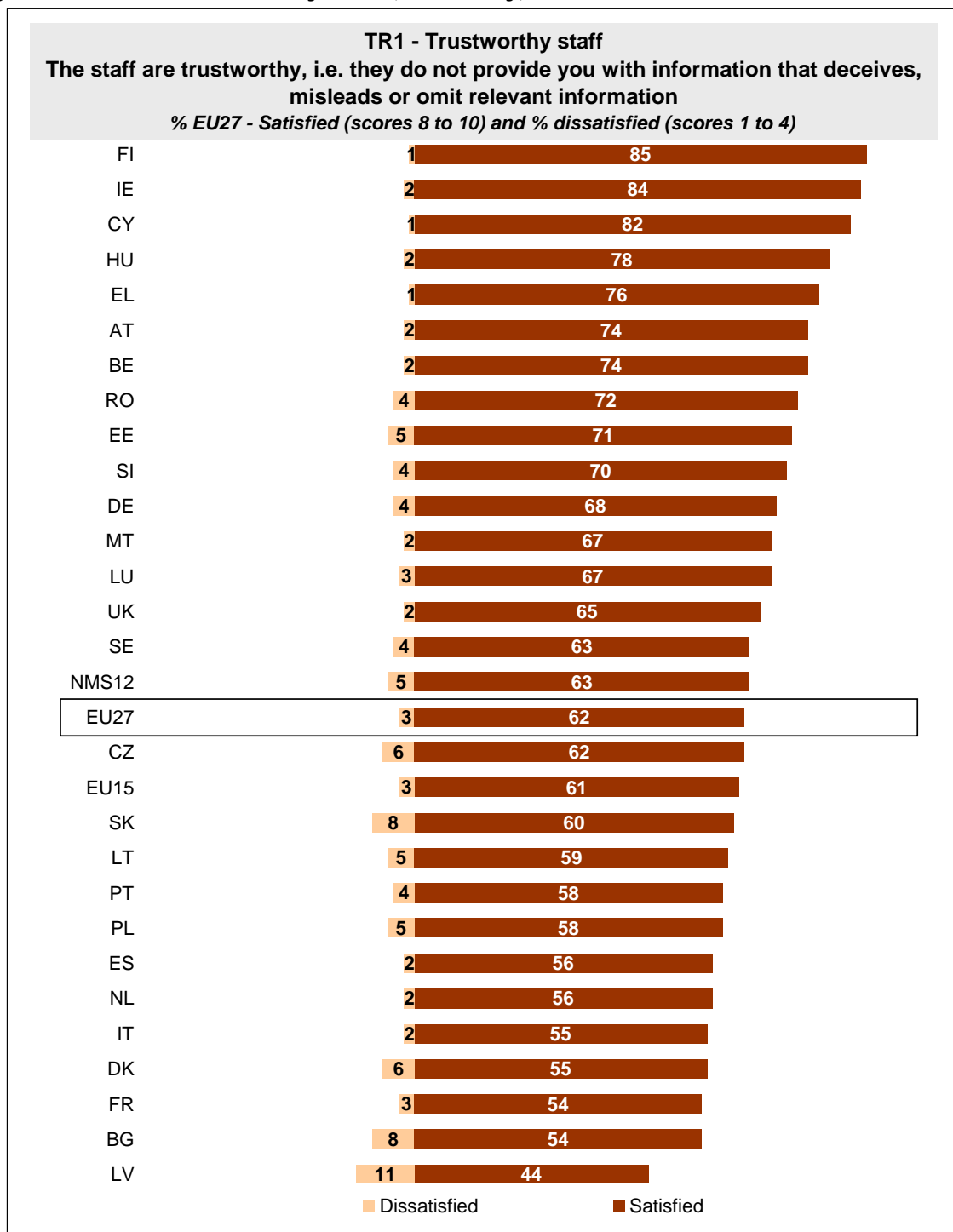
Figure 35 – Trust: Aggressive practices (% country)



Although selling practices do not seem to be a problem for 3 EU consumers in 4, we can observe high proportions of dissatisfied consumers (12% on average) particularly in Czech Republic (24%), Italy, Belgium (21% each) and Poland (20%).

H) TRUSTWORTHY STAFF

Figure 36 – Trust: trustworthy staff (% country)

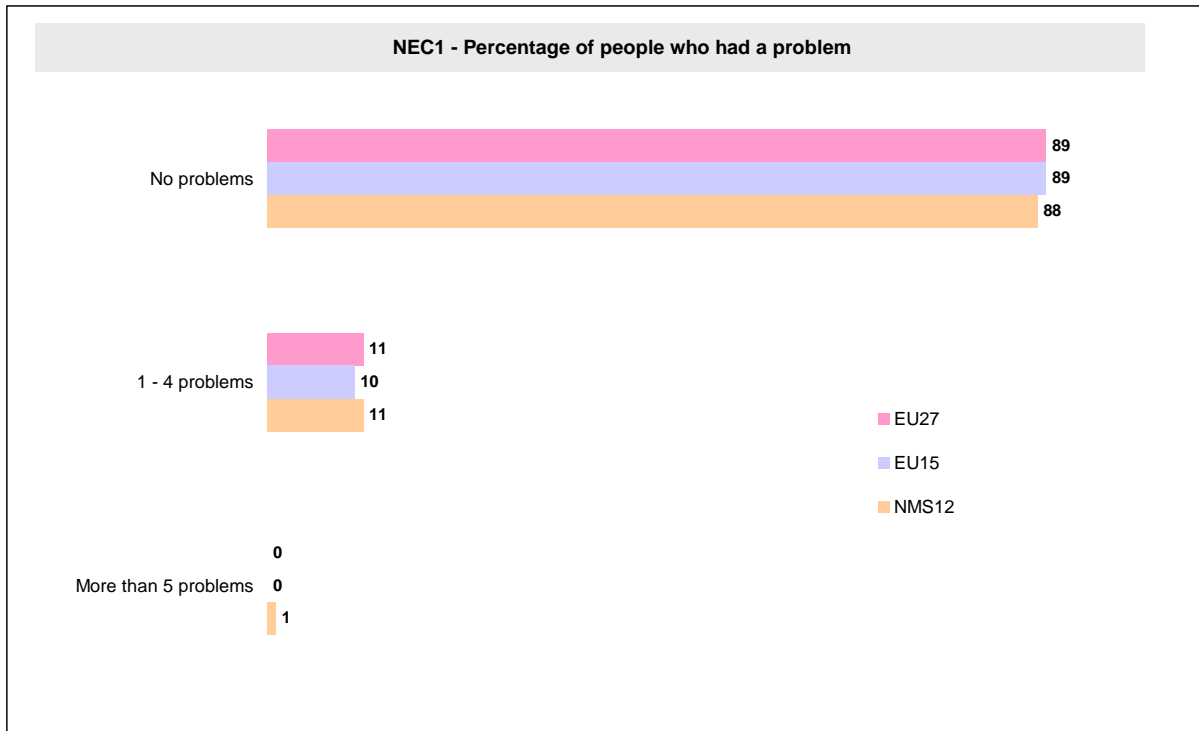


Overall, more than 6 consumers in 10 trust their retailer's staff. Finns, Irish people and Cypriots express the highest levels of satisfaction (more than 80%). However, there are only 44% of Latvians in this case and 11% of them are even dissatisfied.

4. Negative experiences

4.1. NUMBER OF PROBLEMS

Figure 37 – Number of problems with the product



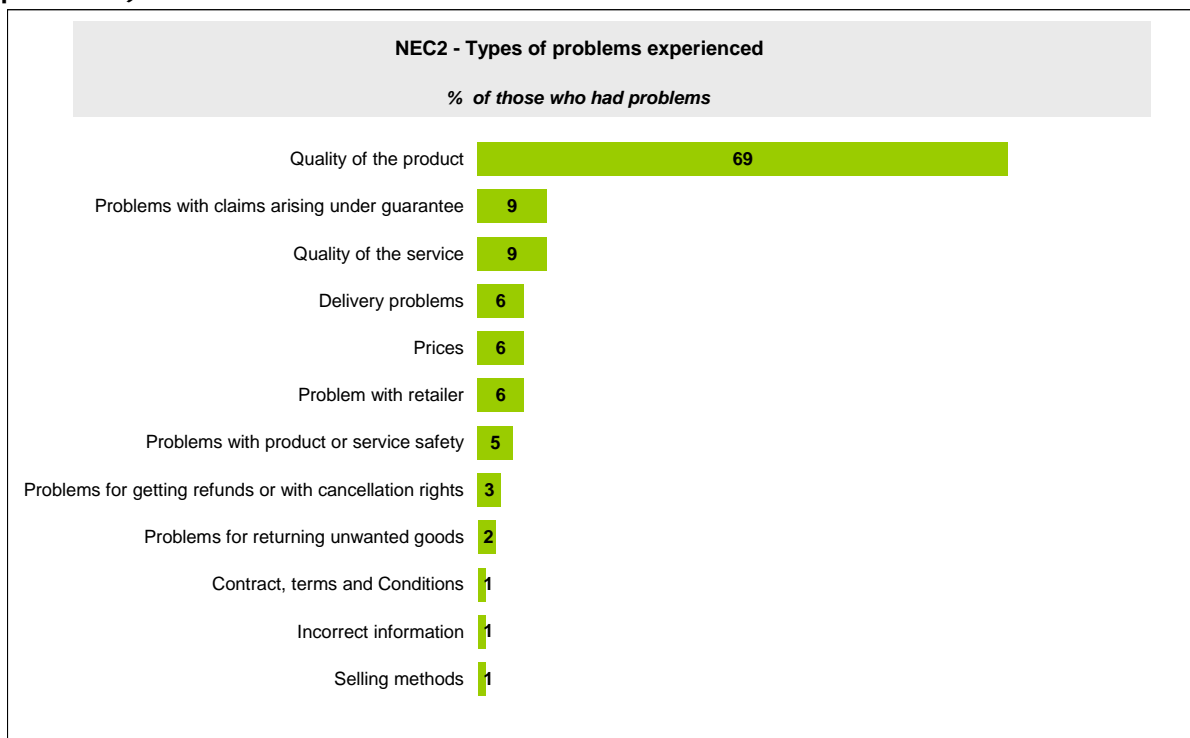
Only 11% consumers in the EU27 have experienced problems when purchasing clothing and footwear in the last 12 months. No significant difference is observed between NMS12 (11%) and EU15 (10%) countries.

There are no significant differences either when looking at the results by distribution channels.

4.2. TYPES OF PROBLEMS

A) OVERALL RESULTS

Figure 38 – Types of problems experienced with the product (% EU27 of those who had problems)



Consumers who have experienced a problem with their retailer are most likely to experience a problem with the quality of products (69% of those who had a problem).

Sample sizes are too small to be able to highlight significant differences between distribution channels.

B) DIFFERENCES BETWEEN EU MEMBER STATES

Bulgarian, Czech, German, Slovakian and Latvian consumers are most likely to report a problem. The quality of products seems to be the most common type of problem across the countries but due to the small bases at country level, further analysis by the type of problem cannot be carried out.

4.3. COMPLAINTS HANDLING

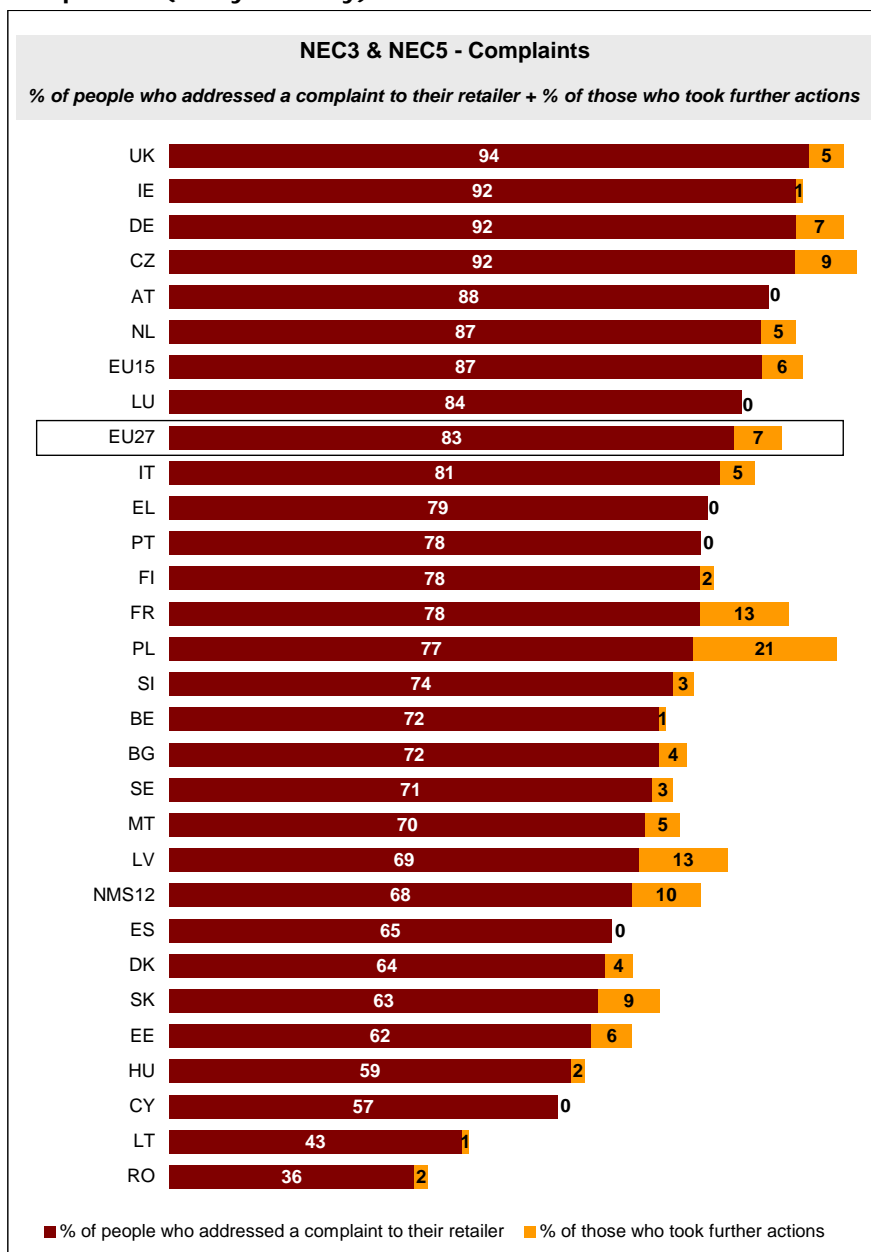
A) OVERALL RESULTS

In general, those who have experienced problems tend also to communicate or discuss it with a representative of their retailer (83%), especially in the EU15 (87% against 68% in the NMS12). Most of them were satisfied with the way their retailer dealt with their complaint (80%) and, consequently, relatively few took further actions against their retailer (7% of consumers in the EU27).

B) DIFFERENCES BETWEEN EU MEMBER STATES

Consumers who said that they have experienced problems with their retailer were asked to indicate whether they have addressed a complaint to their retailer. They were also asked to say whether they took further actions. Results of these two questions are combined in the following chart¹

Figure 39 – Complaints (% by country)



As can be seen in the chart above, in all Member States (except in Romania and in Lithuania), consumers who have had problems tend to address a complaint to their retailer. The small sample sizes do not allow a country-by-country analysis of how complaints are handled by the retailer.

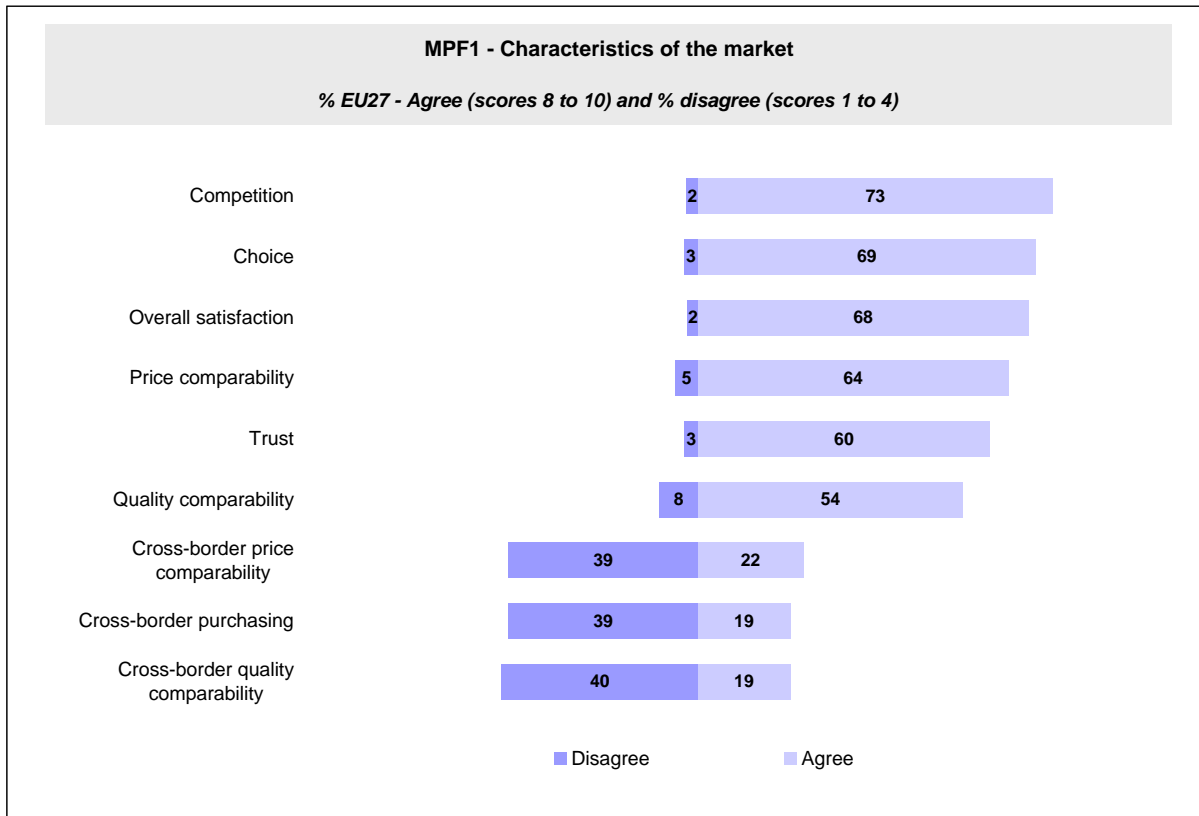
¹ As a consequence, some results may add up to more than 100%.

5. Market factors and commitment

5.1. SATISFACTION WITH THE MARKET

A) OVERALL RESULTS

Figure 40 – Satisfaction with the market characteristics (% EU27)



Overall, consumers are satisfied with the market for clothing and footwear. They are mostly satisfied with:

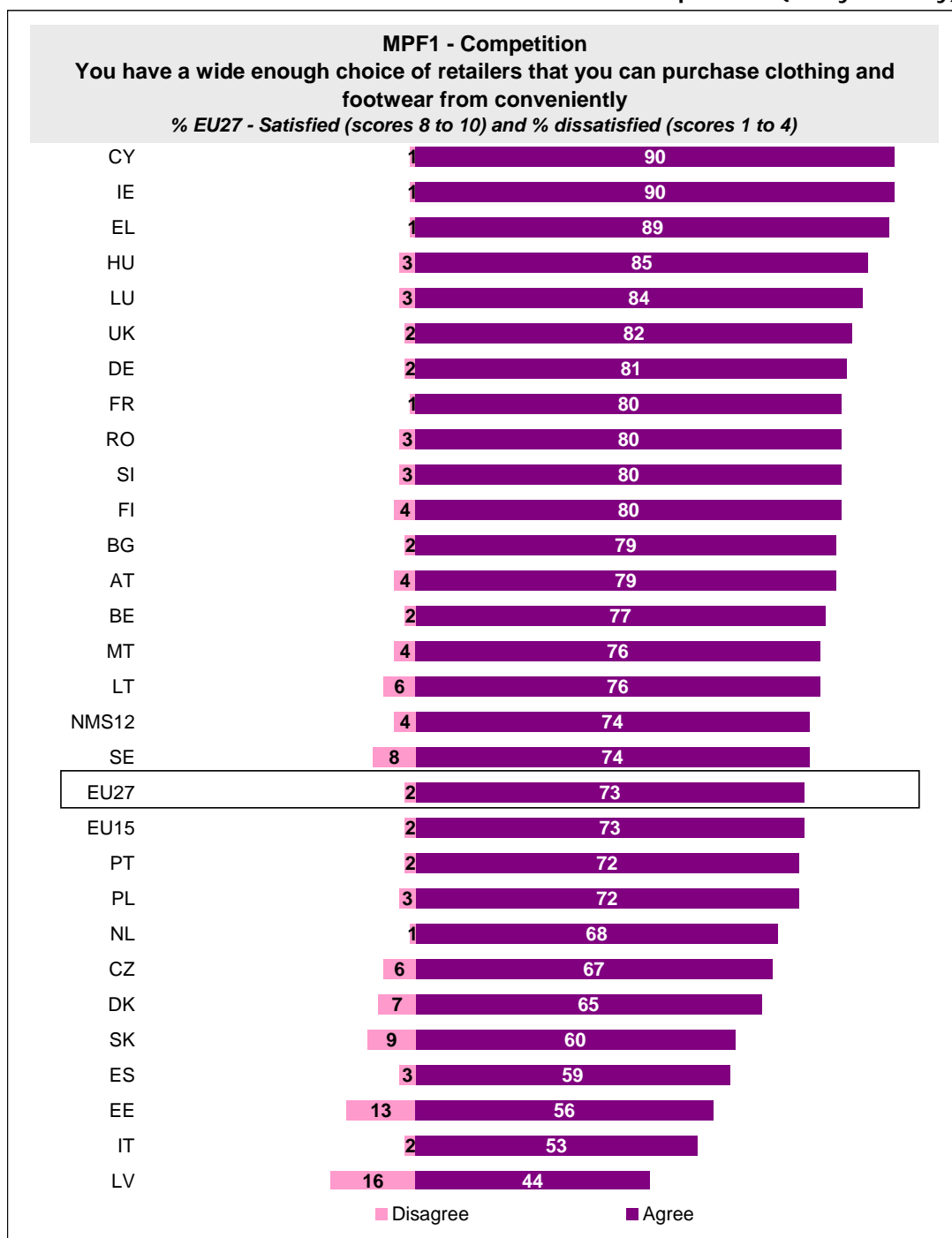
- The competition on the market, i.e. there is a wide enough choice of retailers that they can purchase clothing and footwear from conveniently;
- The choice of clothing and footwear on the market, i.e. the products they want are available.

However, consumers are significantly less optimistic about the cross-border aspects of the market: 40% think cross-border quality comparability is not worthwhile and slightly less than 40% think that cross-border purchasing and cross-border price comparability is difficult.

B) DIFFERENCES BETWEEN EU MEMBER STATES

1. Competition

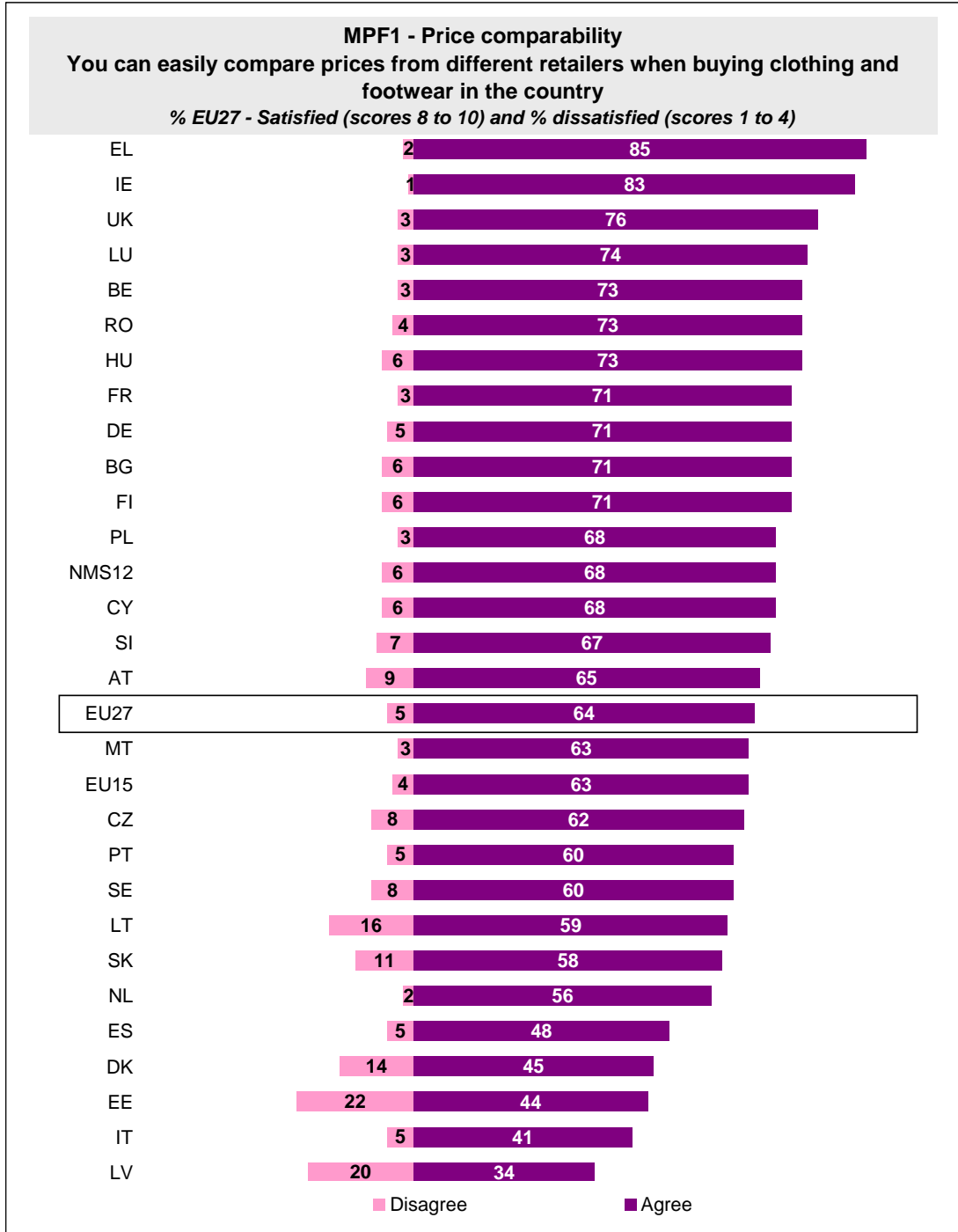
Figure 41 - Satisfaction with the market characteristics: competition (% by country)



More than 7 EU consumers in 10 are satisfied with the choice of retailers available on the market for clothing and footwear. The most satisfied are Cypriots, Irish people (90% each) and Greeks (89%). On the other side of the spectrum we find Latvians (44%), Italians (53%), Estonians (56%) and Spaniards (59%). In addition, 16% of Latvians and 13% of Spaniards (against an EU average of 2%) are dissatisfied with the competition available on the market.

2. Price comparability

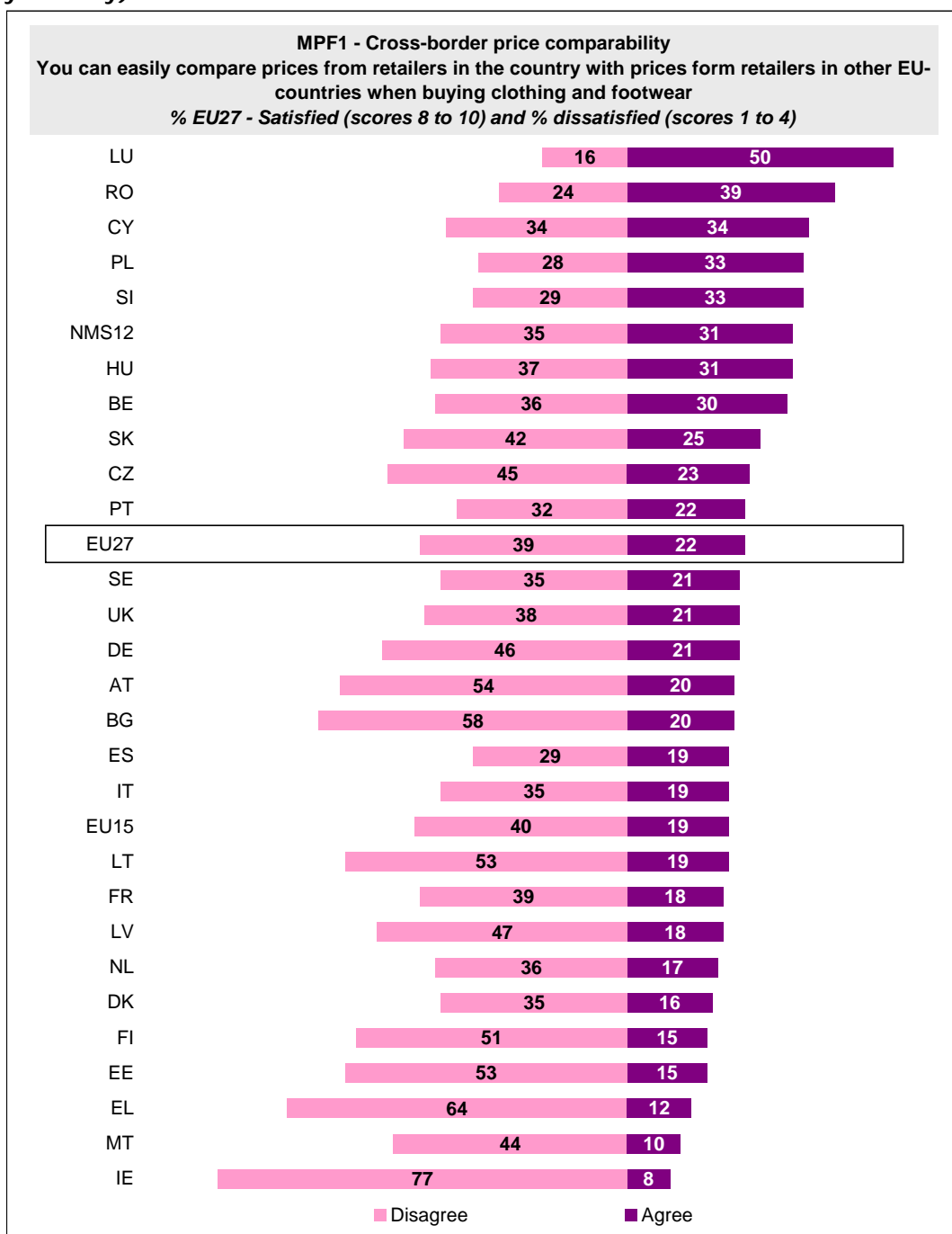
Figure 42 - Satisfaction with the market characteristics: price comparability (% by country)



Overall, 64% of EU27 consumers are satisfied with the possibility offered by the market to compare prices from different retailers, especially in Greece (85%) and Ireland (83%). The least satisfied are Latvians (34%), Italians (41%), Estonians (44%), Danes (45%) and Spaniards (48%). High dissatisfaction rates are observed in Estonia (22%), Latvia (20%), Lithuania (16%) and Denmark (14%).

3. Cross-border price comparability

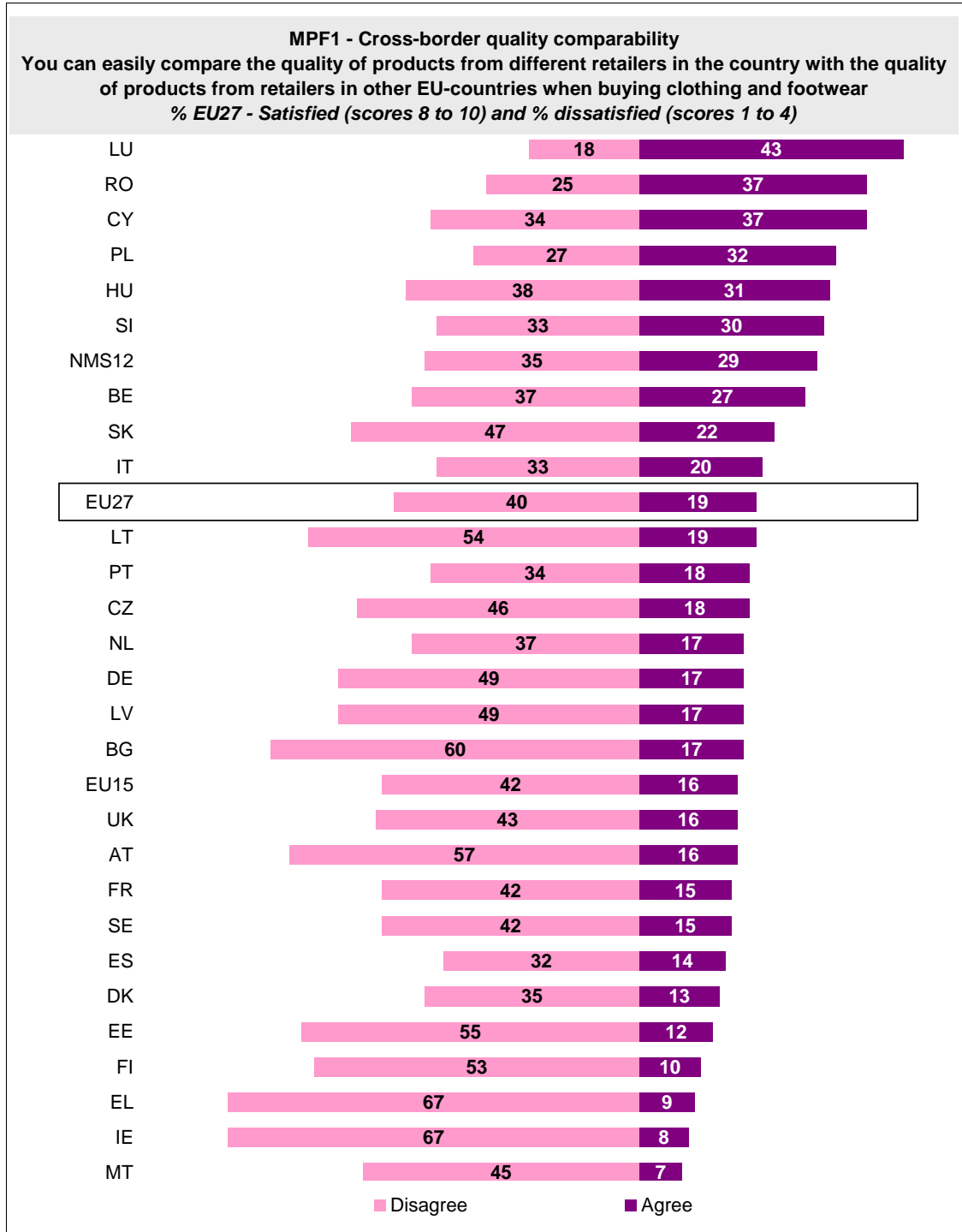
Figure 43 - Satisfaction with the market characteristics: cross-border price comparability (% by country)



From the survey results it appears that cross-border price comparability is difficult to evaluate for a relatively high proportion of people in many countries (average of 13% at EU level). The proportion of “don’t know” goes up to 30% in Denmark and 29% in Malta. In addition, most of those who gave an answer to this question think that cross-border price comparability is difficult (39% against 22% of consumers who think it is easy). This is especially the case in Ireland (77%), Greece (64%) and Bulgaria (58%). Conversely, one in two people of Luxembourg think it is easy.

4. Cross-border quality comparability

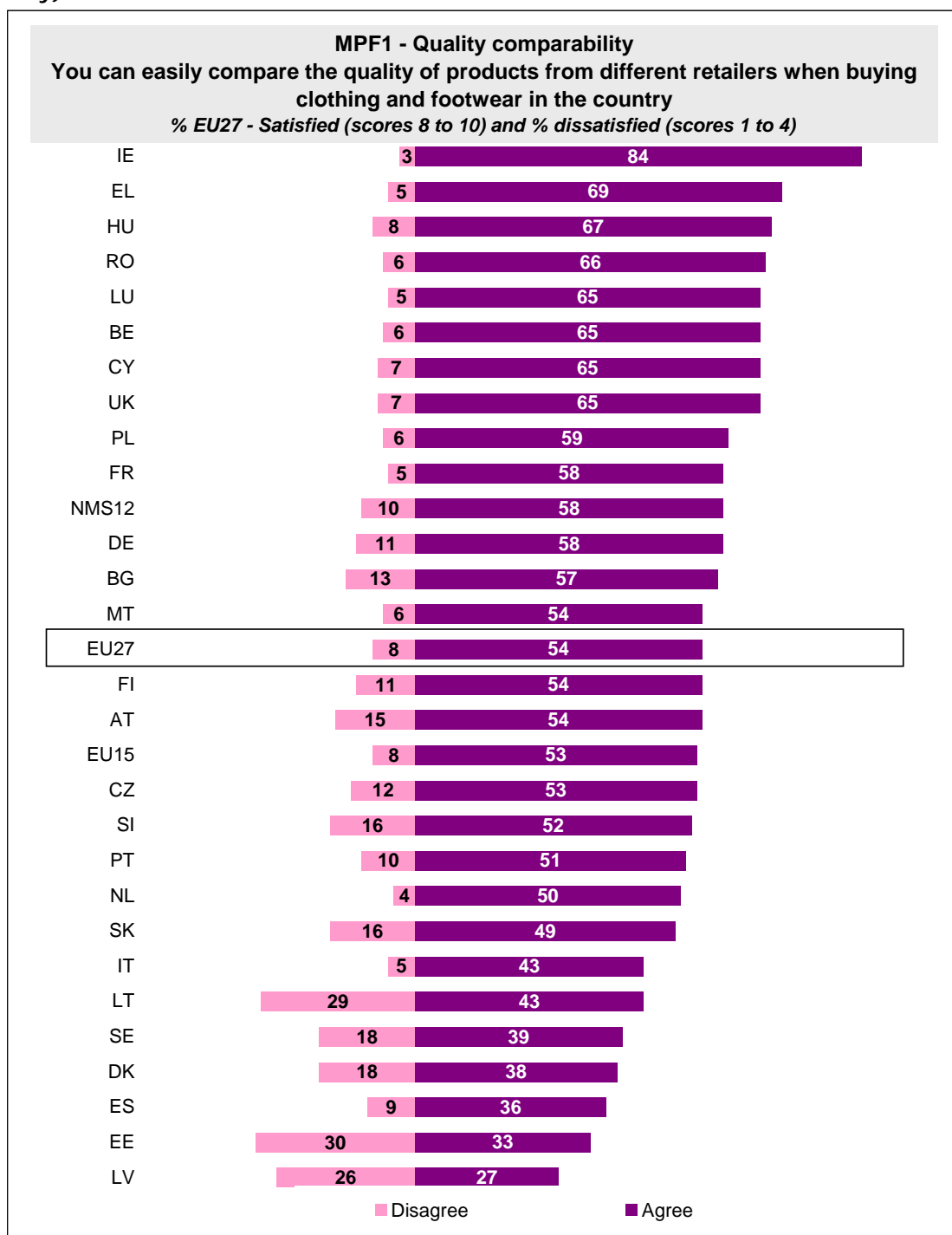
Figure 44 - Satisfaction with the market characteristics: cross-border quality comparability (% by country)



Cross-border quality comparability is not easy either for a majority of consumers. In addition, we can observe high proportions of “Don’t know” answers (14% on average), with peaks in Malta (32%) and in Denmark (31%). Again, it is in Greece, Ireland and Bulgaria where a larger share of consumers thinks that cross-border quality comparability is difficult.

5. Quality comparability

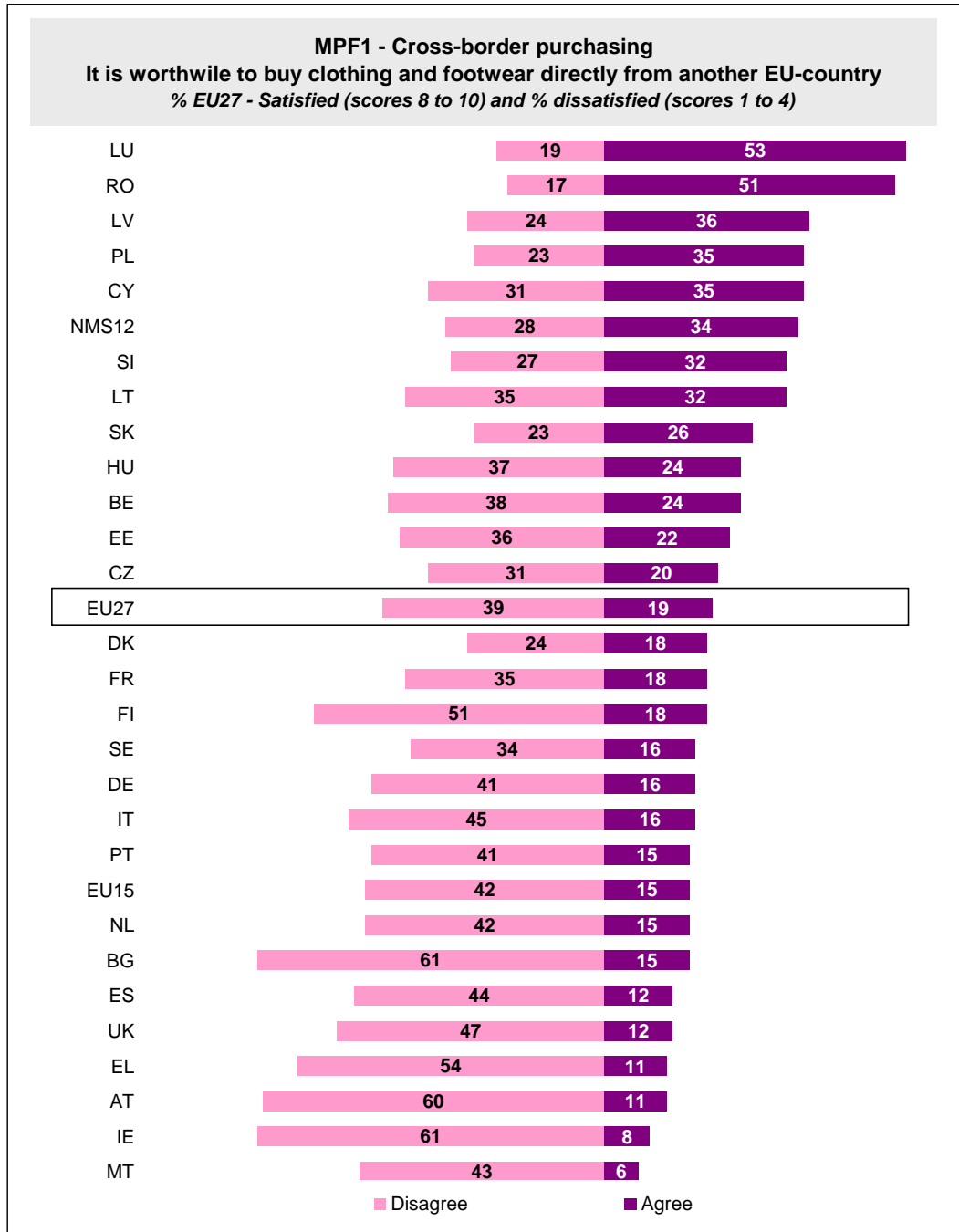
Figure 45 - Satisfaction with the market characteristics: Quality comparability (% by country)



A small majority (54%) of EU consumers thinks it is easy to compare the quality of products from different retailers. Less than 10% of them have the opposite opinion. Quality comparability seems to be a problem particularly in the three Baltic countries (between 26% and 30% of dissatisfied consumers) and, to a lesser extent, in Sweden and Denmark (18% each) whereas 84% of Irish consumers express their satisfaction.

6. Cross-border purchasing

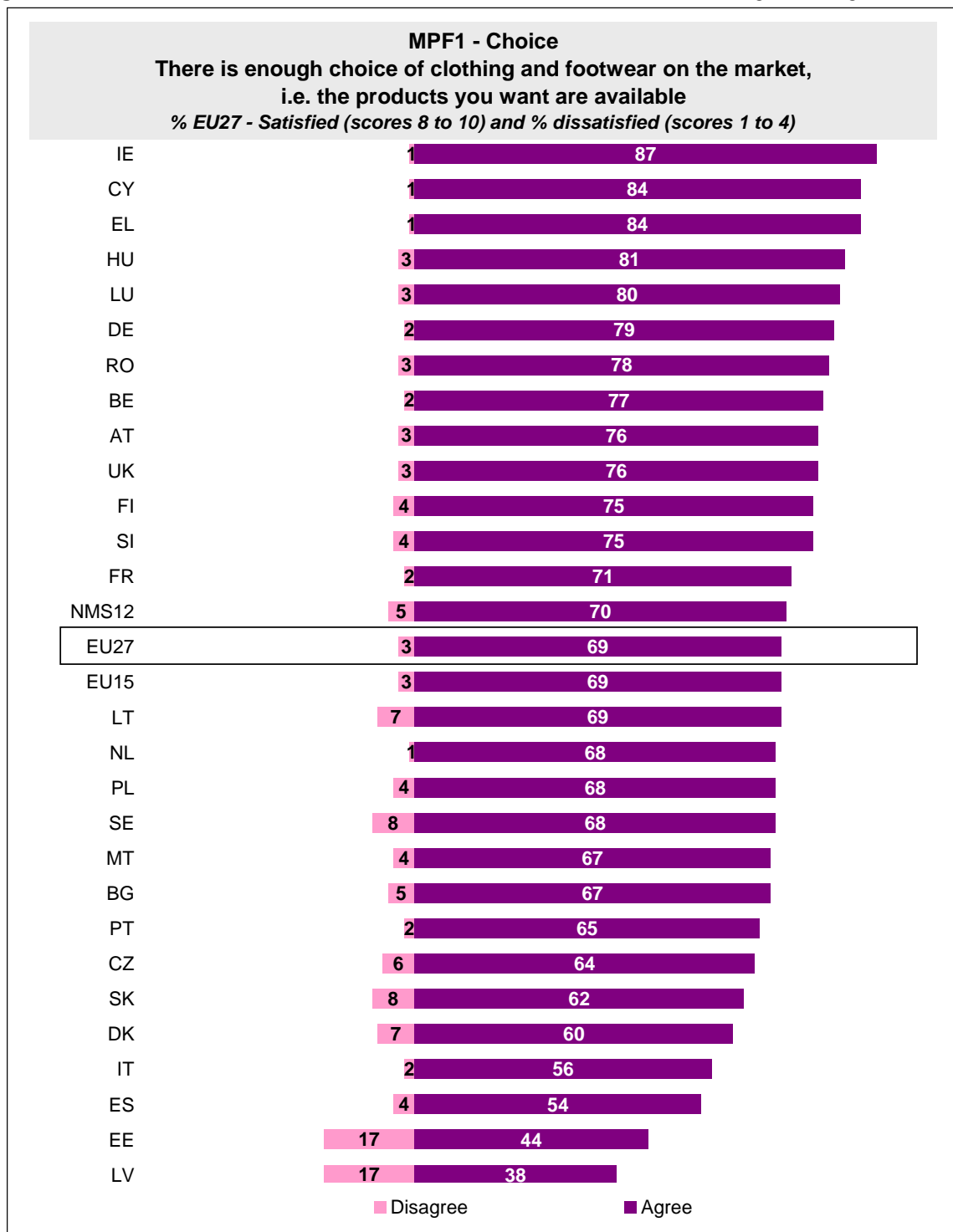
Figure 46 - Satisfaction with the market characteristics: Cross-border purchasing (% by country)



Four European consumers in 10 think it is not worthwhile to buy clothing and footwear from another EU country. It is interesting to note the important difference in answer patterns between old (15% agree and 42% disagree) and new Member states (34% agree and 28% disagree). The most negative consumers in this respect are found in Bulgaria, Ireland and Austria (60% and more dissatisfied consumers), while the highest levels of positive opinions are held by people of Luxembourg (53%) and Romanians (51%). In addition, this question seems difficult to answer for 16% of EU consumers, and especially in Denmark (39%), Malta, Sweden (33% each) and Slovakia (31%).

7. Choice

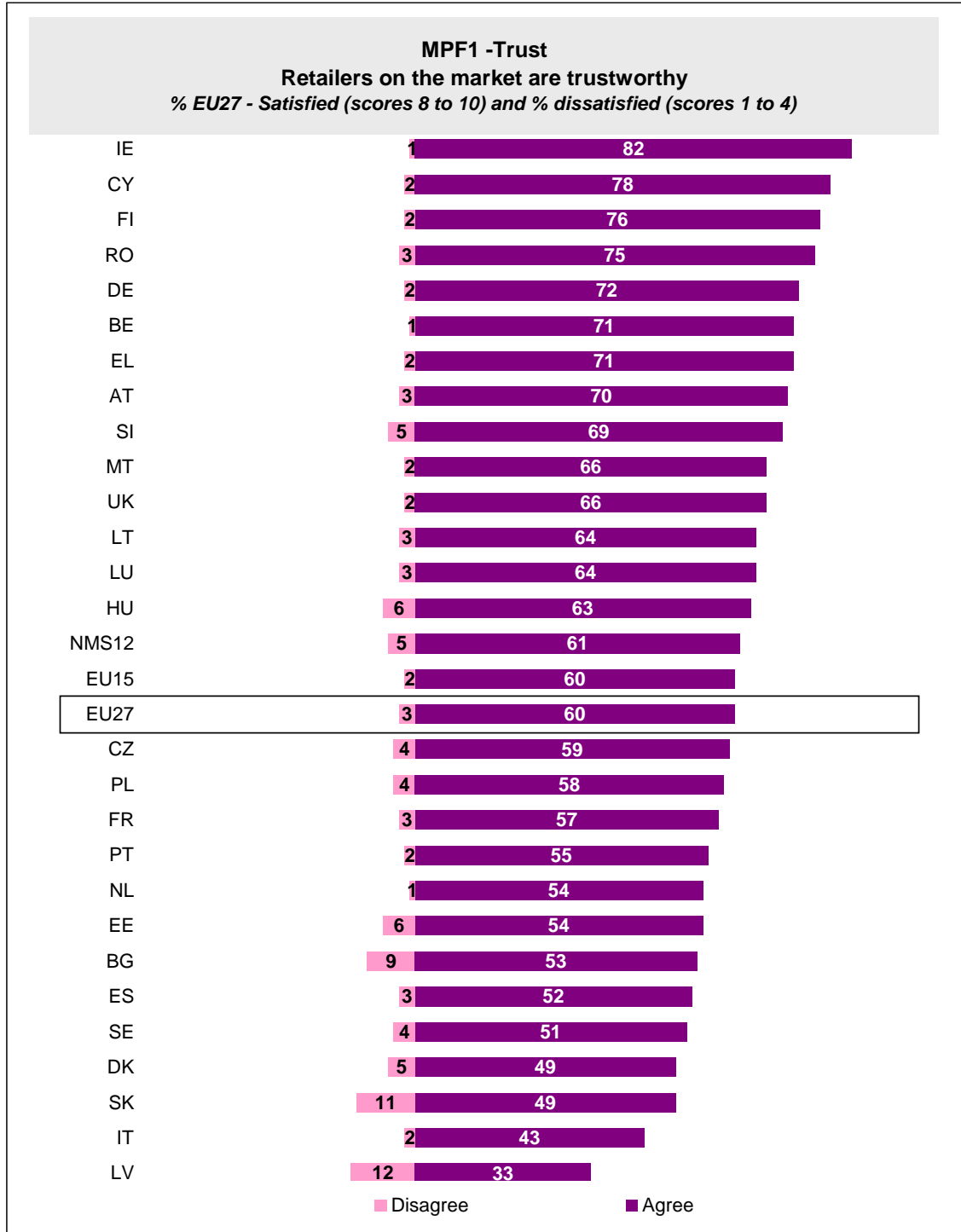
Figure 47 - Satisfaction with the market characteristics: choice (% by country)



There is enough choice of clothing and footwear on the market, according to almost 7 Europeans in 10. The Irish people, the Cypriots and the Greeks are the most satisfied (84% or more). On the other side of the spectrum we find Latvia and Estonia with respectively 38% and 44% satisfied consumers and with both 17% dissatisfied consumers (against an EU average of 3%).

8. Trust

Figure 48 - Satisfaction with the market characteristics: trust (% by country)



Retailers on the market for clothing and footwear are trustworthy, according to 6 Europeans in 10. The most satisfied consumers are the Irish people (82%) whereas the least satisfied respondents are found in Latvia (33%) and Italy (43%). Again, proportions of dissatisfied consumers are marginal across EU countries, except in Latvia (12%), Slovakia (11%) and Bulgaria (9%).

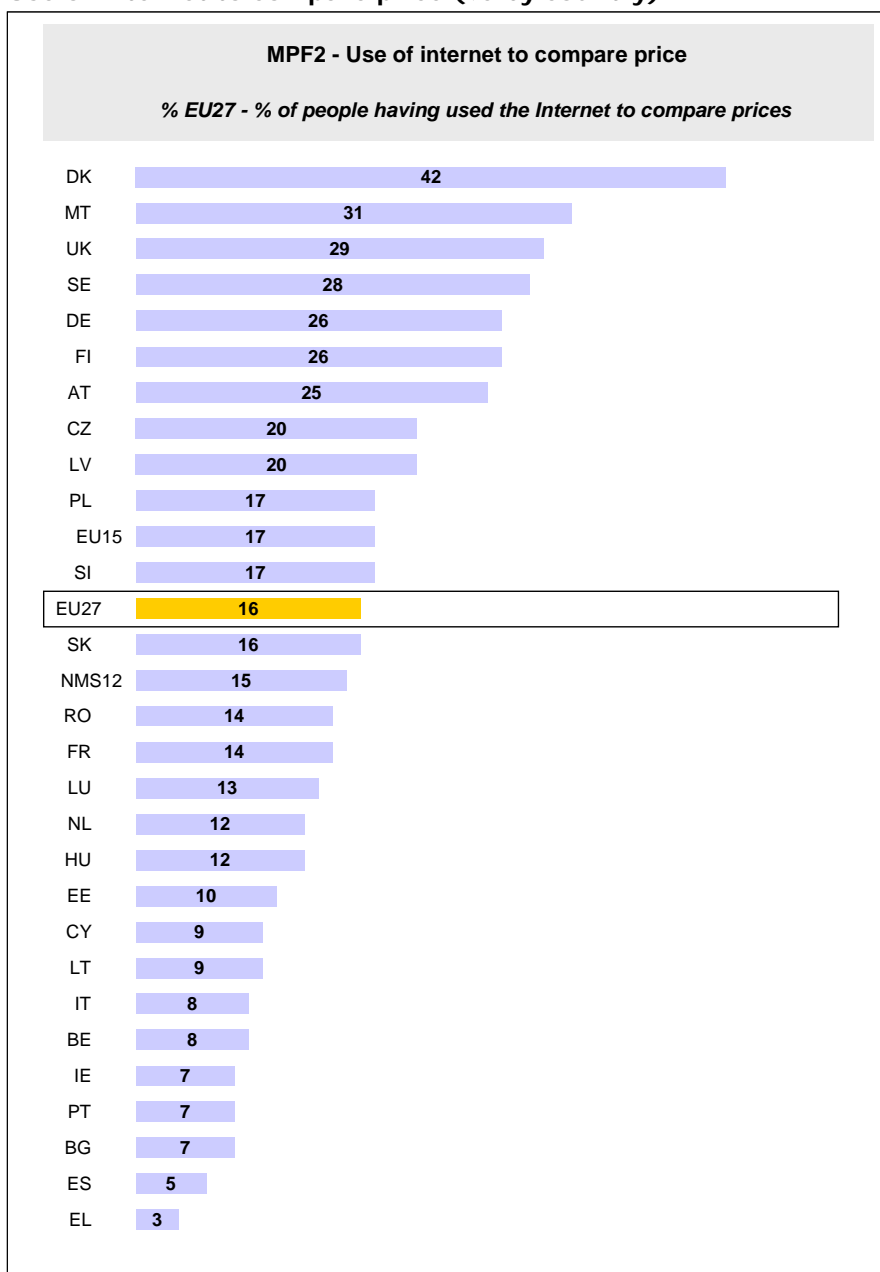
5.2. PRICE COMPARISON ON THE INTERNET

A) OVERALL RESULTS

16% of EU consumers have used the Internet to compare prices of clothing and footwear. Not surprisingly, those who have bought products via the Internet are the most likely to compare prices on the Internet (88%). Also, those who purchased products in retail chains stores are slightly more likely than the average EU consumer to use the Internet for price comparisons (19% against an EU average of 16%).

B) DIFFERENCES BETWEEN EU MEMBER STATES

Figure 49 – Use of internet to compare price (% by country)

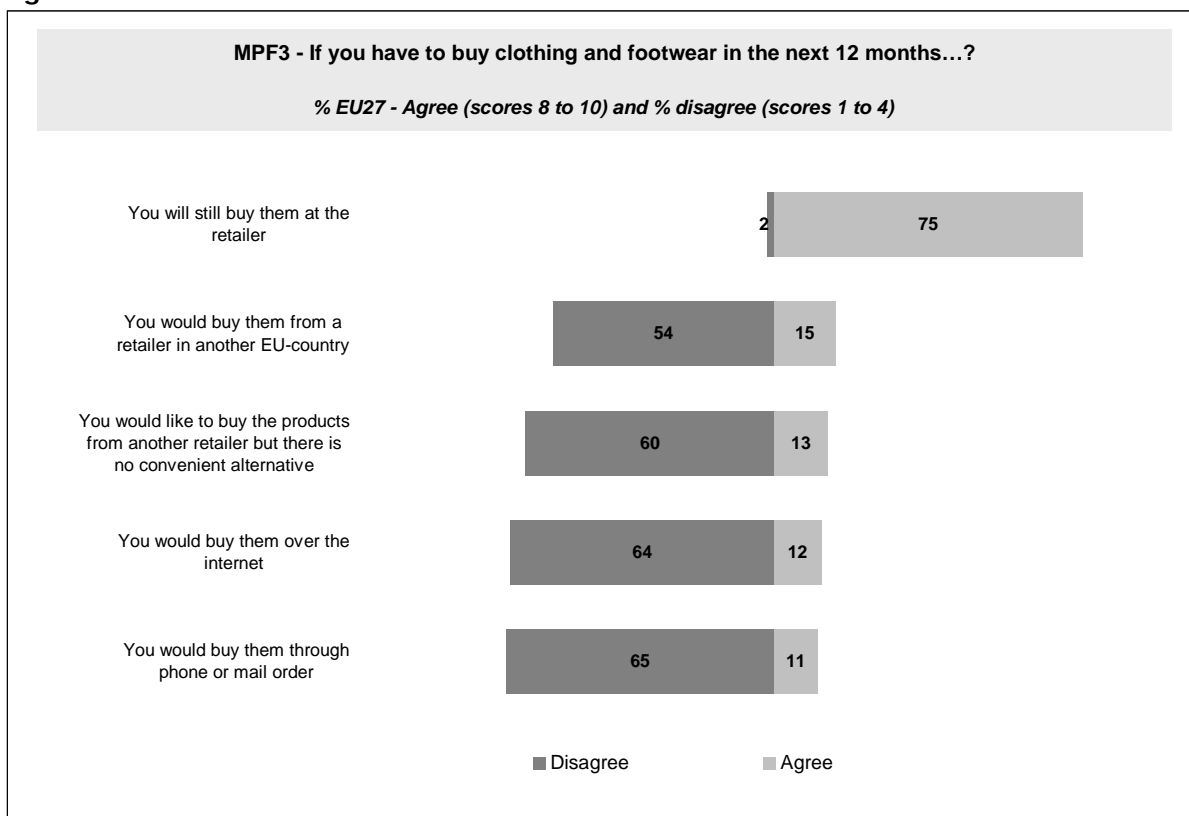


Although there are 42% of Danish consumers who have used the Internet to compare prices of clothing and footwear, only 3% in Greece, 5% in Spain and 7% in Bulgaria, Portugal and Ireland to have done so.

5.3. COMMITMENT

A) OVERALL RESULTS

Figure 50 – Commitment in the next 12 months



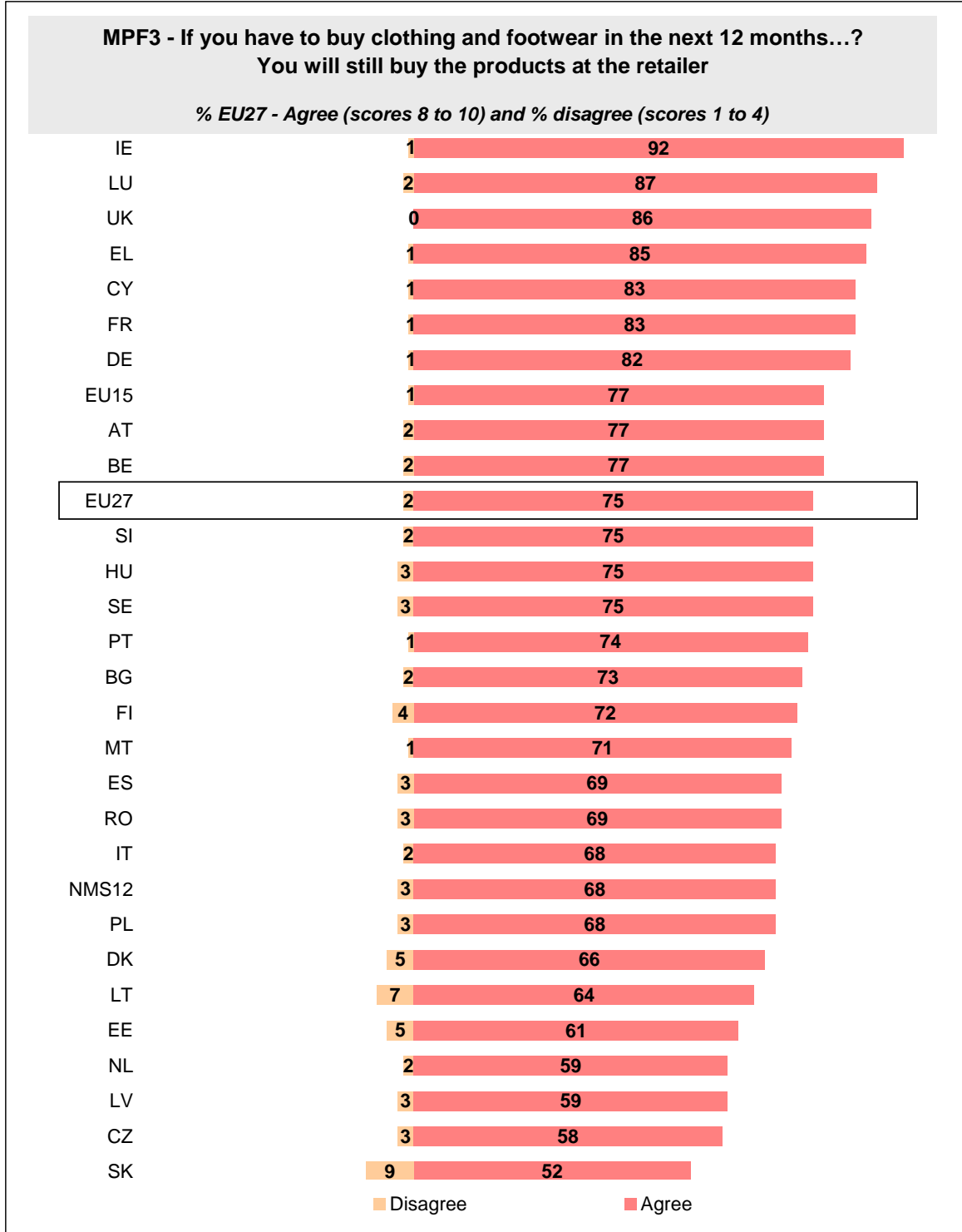
Three quarters of EU consumers do not intend to change retailer when it comes to buy clothing and footwear. 13% would be willing to do so but they feel that there is no convenient alternative.

In addition, 12% of those who have not yet bought clothing and footwear on the Internet (99% of consumers) will do so in a near future. A similar observation can be done when looking at purchases through mail/phone order.

A fair share of consumers (15%) would consider purchasing these products in another EU country.

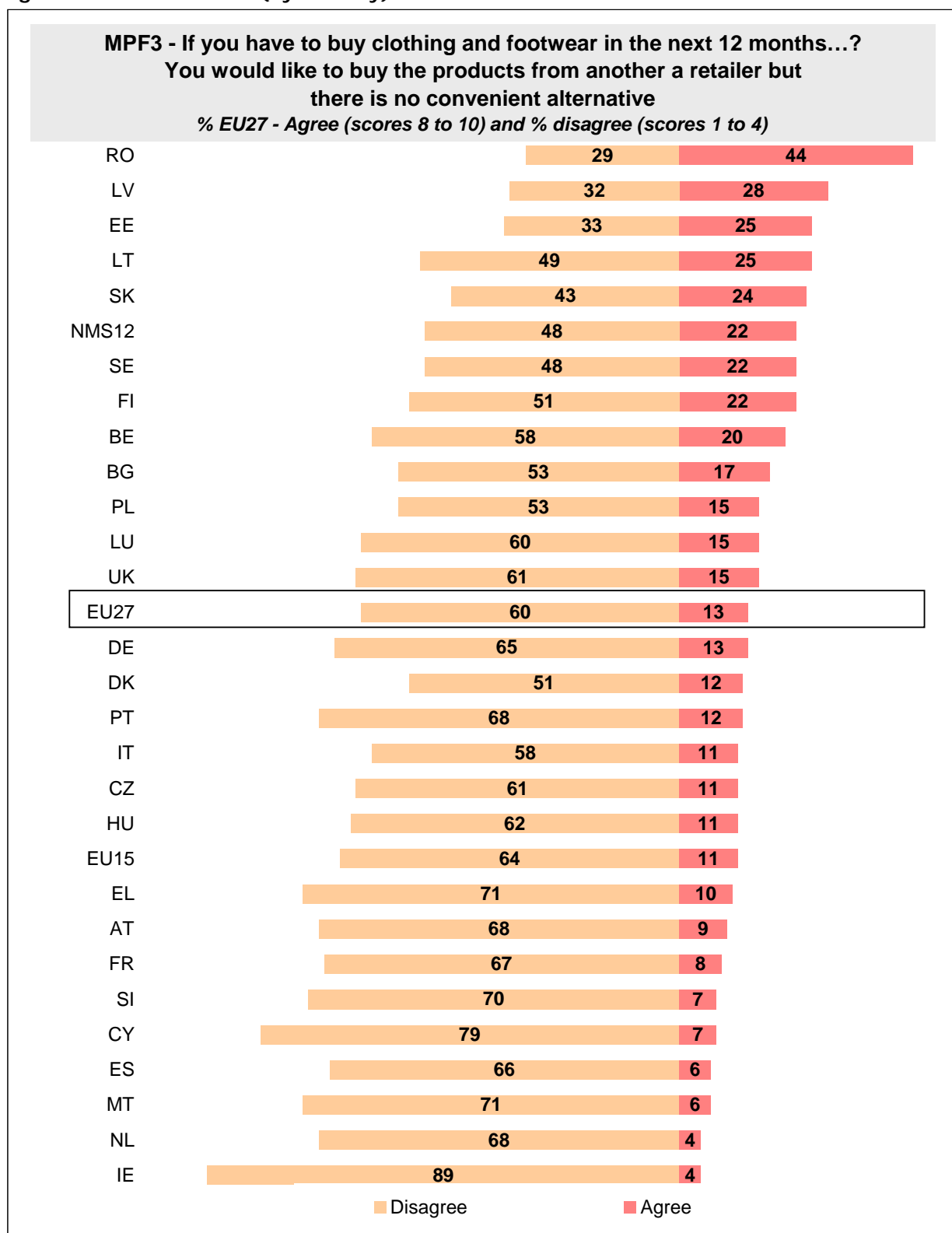
B) DIFFERENCES BETWEEN EU MEMBER STATES

Figure 51 – Commitment in the next 12 months to still buy at the retailer (by country)



Commitment to one's retailer is quite high in all EU countries, especially in Ireland (92%). However, it is rather low in Slovakia (52%). The less committed consumers are those who have bought clothing and footwear on street markets (60%).

Figure 52 – Alternatives (by country)



More than one fourth of Romanians would like to buy clothing and footwear from another retailer but they feel there is no convenient alternative. To a lesser extent, this is the opinion shared by one quarter of consumers in every Baltic country.

Chapter 4 – Priority actions

1. What matters most to consumers?

1.1. SHORT NOTE ON THE MODEL

The **statistical model** which has been specifically built for DG SANCO offers a range of possible added-value analysis and allows us to explain in particular the contribution of observed variables to overall satisfaction, i.e. the elements that matter most to consumers.

The satisfaction model uses two types of variables:

- Driving factors, i.e. variables explaining satisfaction: Price/Quality – Service – Trust - Market factors. The construct 'Price/Quality' represents all items that enable consumers to evaluate the value for money offered by the retailer. 'Service' includes all the items associated with the quality of service. 'Trust' includes all the items that influence the level of trust towards the retailer. 'Market factors' includes items that are relevant to competition in the market, comparability across retailers, choice, etc.
- Performance indicators: variables that are a consequence of satisfaction, i.e. commitment – complaints

The model indicates the level of contribution made by each variable to overall satisfaction. This contribution is calculated through a regression analysis, which determines the weight of each variable. These weights can take a value ranging from 0 to 1. The more a weight is close to 1, the more the variable is contributing to overall satisfaction, or, in other words, the more this variable matters to consumers.

For example, if the regression coefficients are the following: 0.4 (Price/Quality), 0.35 (Service) and 0.25 Trust). This means that price is the variable that contributes to satisfaction most, i.e. this is the most important element for consumers when evaluating a product market.

The construct 'Market factor' being highly correlated (coefficient varying between 0.6 and 0.8) with Price/Quality, Service and Trust, we will exclude it from the regression equation. This enables to isolate the individual effect of Price/Quality, Service and Trust on the overall satisfaction.

1.2. REGRESSION WEIGHTS

The calculated regression weights for the market for household electrical equipment are the following:

PRICE/QUALITY	SERVICE	TRUST
0,20	0,31	0,30

This means that the **quality of service** and **trust** (and its components) are the elements that matter most to consumers. At the same, price has a relatively weak impact on the level of overall satisfaction.

1.3. PERFORMANCE INDICATORS

The correlation coefficients of Commitment and Complaints with Satisfaction are the following:

COMMITMENT	COMPLAINTS
0,50	-0,14

Satisfaction has a relative positive impact on consumers' commitment to their retailer. The correlation coefficient shows that satisfaction explains commitment to a fair extent (50%). In other words, consumers who are satisfied are less likely to switch to another retailer.

On the other hand, there is not a strong statistical correlation between Satisfaction and Complaints. This means that low satisfaction does not result directly to more complaints.

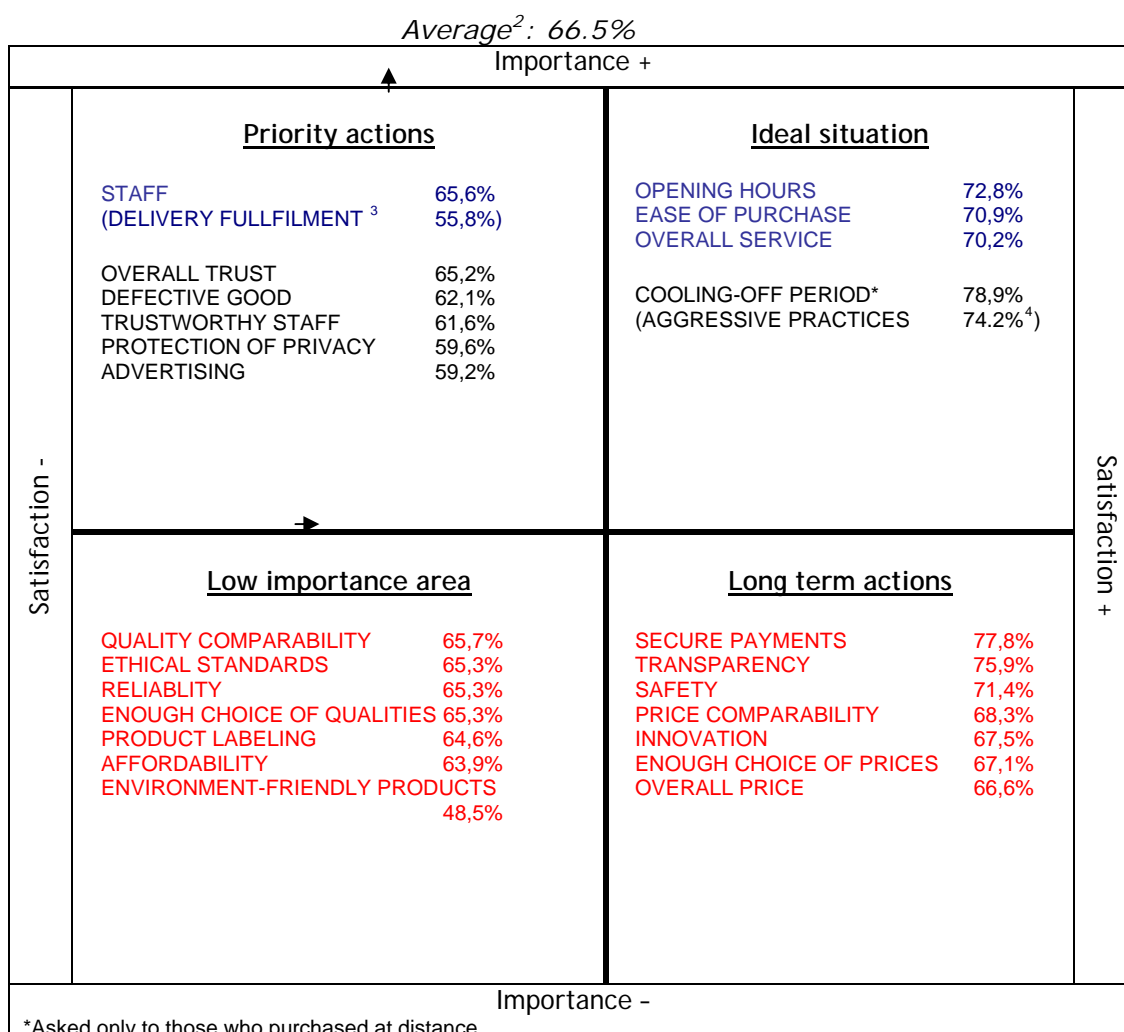
2. Two-dimensional analysis

The **two-dimensional analysis** is one of the most common approaches to be carried out on consumer satisfaction data and helps in the presentation of the final results. The aim of this analysis is to summarise the **opportunities for action** (i.e. areas where the market does not perform so well and where actions to change the situation are needed in order to improve consumer satisfaction) and **areas where no action is needed** (i.e. areas where the market performs well and where no action is required), on a simple mapping system that takes into account:

- **the proportion of satisfied consumers with each components of Price/Quality, Service and Trust;**
- **the regression weights of the 3 drivers of satisfaction** (Price/Quality, Service and Trust). As mentioned before, these coefficients express **the relative importance** (contribution) of each of these 3 drivers in the overall satisfaction. The regression weight can have a value ranging from 0 to 1.

This mapping system is particularly useful in providing a visual representation of **priority areas for improvement** for the European Commission and DG SANCO to take into account.

The diagram on the next page shows the areas where priority actions are needed to improve consumers' satisfaction with **the market for clothing and footwear**.



OVERALL OBSERVATIONS

On average, 66.5% of consumers are satisfied with all aspects relating to Price/Quality, Service and Trust.

Concerning the three dimensions used in the model, consumers are equally satisfied with the quality of service (67%), aspects of price/quality (67%) and trust issues (66%).

Consequently, it can be said that none of the dimensions seems to be overall performing better than the others. This being the case, the focus should be turned on aspects of trust and the quality of service, since these are the two areas which contribute the most to the level of overall satisfaction.

² Average proportion of satisfied consumers on all items relating to the 3 drivers of satisfaction i.e. Price/quality, Service and Trust.

³ Consumers appear to be the least satisfied with “delivery fulfillment”. This is why it appears in the upper left quadrant. However, the high proportions of “don’t know” answers suggest that a large share of consumers have not been delivered clothing and footwear. Therefore, this element of service should not be considered as a priority action as such.

⁴ Although satisfaction with this element is far above the average (which justifies its position in the “ideal situation quadrant”), results show a significant proportion of dissatisfied consumers (12% on average). Improvement in this area is thus needed.

SPECIFIC AREAS OF INTEREST

SERVICE

European consumers are highly satisfied with the opening hours and ease of the purchase process of their retailers for clothing and footwear. At the same time, it seems that the performance of the staff could be improved in terms of their skills and service.

TRUST

In general, aspects of trust form largest set of issues that should be considered as priority aspects. With the exception of the cooling-off period, all variables receive satisfaction scores that are under the figure for overall satisfaction, while their impact on it is undisputable.

Although a great majority is satisfied with selling practices, a large share of consumers is dissatisfied. This is why improvement in this field is needed.

PRICE/QUALITY

Even if price/quality aspects are not seen as important contributors to overall satisfaction as variables of the other two dimensions, they constitute a firm basis for the overall satisfaction with the market for clothing and footwear. Consumers are particularly satisfied with secure payments, transparency and safety aspects of this dimension. Consequently, the high performance on these variables should be maintained in the long-term in order to keep up the performance of the market.

CONCLUSIONS

Considering the observations presented above, the following can be seen as potential areas in which the market for clothing and footwear:

- Improving consumers' confidence in the consumer protection in the market, concerning particularly advertising issues.
- Better protect consumers against aggressive selling practices

On the other hand, the positive elements of the market that must be maintained are:

- Transparency, accuracy and safety of the payment process;
- Ease of the purchase process.