WHAT APPAREL SHOPPERS REALLY WANT IN STORE

A Data-Driven Look At Apparel's True

Customer Experience Leaders

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Realytics

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INTRODUCTION

CX in Apparel is not where the industry assumes

In apparel retail, customer experience is supposed to follow price: Luxury leads, Mid-Market competes. Value follows.

That narrative is comforting. And wrong.

This white paper reveals a clear contradiction between what retailers believe delivers the best customer experience, and what customers actually reward. The brands most associated with prestige, aspiration and elevated service are not consistently leading on the experience elements that matter most day to day.

Meanwhile, retailers long dismissed as "good enough" are quietly outperforming on the fundamentals that shape satisfaction, loyalty and trust.

The data shows that CX today is less about theater and more about execution. Ease, clarity, consistency and reliability now outweigh spectacle and status. In this new reality, luxury experiences don't guarantee more satisfaction, and brand mythology no longer shields operational friction.

The most surprising insight is not that shopper expectations have shifted, but that many retailers have failed to notice. Customer experience leadership has changed hands, largely unnoticed by the industry itself.

What follows is not a ranking of brands, it's a reset of assumptions.

Rethink Retail Advisory and Realytics have analyzed more than **300,000** customer reviews to identify the Top 5 CX retailers in the apparel industry across Luxury, Mid-Market and Value apparel Sectors, and why.

EXECUTIVE SUMMARY

In reviewing the data, the findings were surprising, revealing a clear shift in today's consumer.

Key Findings:

1. **Value Apparel Quietly Leads on Customer Experience**

Value apparel retailers consistently outperform expectations across core experience drivers such as ease of shopping, store navigation, communication and process efficiency. These retailers excel by prioritizing clarity, speed and reliability, delivering a friction-light experience that resonates strongly with today's shoppers.

2. **Luxury Underperforms On The Basics That Matter Most**

Despite strong brand equity, luxury apparel underdelivers on several fundamental CX elements, including store flow, consistency and operational execution. The data suggests that aspirational branding doesn't offset friction when basic expectations are unmet, exposing a vulnerability in the premium experience model.

3. **Mid-Market Apparel Is Stuck in the Middle**

Mid-market apparel retailers tend to cluster around average performance, neither leading nor failing. This reflects an unresolved tension between value-driven efficiency and premium style experience cues, reflecting inadequacy without meaningful differentiation or emotional loyalty.

4. **Operational Excellence Outweighs Brand Theater**

Across all segments, the strongest drivers of positive customer sentiment are executional fundamentals: easy navigation, clean and well maintained stores, predictable processes and clear communication.

5. **CX Leadership Has Shifted, Without The Spotlight**

The most significant finding is not just who leads, but why. CX leadership is increasingly defined by confidence, efficiency and trust, not price point or prestige. Value retailers have adapted faster to this shift, while luxury and mid-market players lag behind evolving customer expectations.

The Bottom Line: The top performers in apparel CX today are not the usual suspects. CX leadership is earned through disciplined execution of the fundamentals, not brand mythology, scale or price tier.

METHODOLOGY

How We Measure

This analysis covers 108 U.S. apparel brands across 34,538 physical store locations, representing over 10% of the U.S. apparel market by number of stores, focusing exclusively on brick and mortar.

The data is based on more than 313,000 consumer reviews collected throughout the 2025 calendar year from trusted major public platforms, including Yelp, Trip Advisor, Bing Maps, Google Maps and more).

Reviews were linked to individual store locations and analyzed using Realytics' proprietary AI system to extract sentiment and customer-stated topics, uncovering the granular drivers of CX rather than relying solely on platform-provided star ratings. This produces a bottom-up, review-derived customer satisfaction (CSAT) metric that enables consistent, location-level comparison across Luxury, Mid-market and Value apparel retail segments in the U.S.

By grounding our analysis in what consumers explicitly say, rather than only how they rate their experience, the methodology enables high-resolution identification of performance drivers.

Realytics

Realytics is a customer intelligence and analytics firm that transforms unstructured shopper feedback into actionable insights for retail leaders.

By combining large-scale data collection with advanced text analysis and benchmarking, Realytics helps retailers understand what truly drives CX, loyalty and performance across channels and segments.

LUXURY
APPAREL

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LUXURY APPAREL

The top factors driving satisfaction/dissatisfaction at luxury retailers and brands are product, location, store and staff. These factors made the biggest difference in customer reviews and satisfaction, and can provide useful indicators to retailers for where to make small changes that can result in outsized benefits to the shopper experience.

The luxury leaders' scores were positively impacted by customer experiences across these four areas, which were the biggest differentiators between the leaders and the laggards:

- Staff helpfulness
- Product knowledge
- Product quality
- Store cleanliness

1. **Staff**

Staff helpfulness and knowledge made the most positive impact on customer satisfaction, lack of professionalism was a top contributor to negative experiences.

Areas where Staff had detrimental effects on the customer experience:

- Disrespectful/Rude Behavior
- Customer Profiling/Discrimination
- Unhelpful/Dismissive Service

Areas where Staff made a positive impact on the customer experience:

- Attentive and Knowledgeable Service
- Personalized Assistance
- Friendly and Welcoming Staff
- 'Above & Beyond' Assistance

"Needed a patch for my backpack and they just replaced the entire backpack instead of me having to wait two months for repair. Izzy was amazing!"

LUXURY APPAREL

2. **Product**

Product Quality is table stakes for luxury brands yet it remains a top differentiator for luxury retailers and brands. Product Variety matters as well
Areas where Product Quality made a positive impact on the customer experience:

- Long-lasting & Durable
- Comfort & Fit
- High-Quality Materials
- Consistent Product Experience

"I love the quality of the clothes. Susie was very helpful and had excellent product
 knowledge. I purchased several outfits and look forward to coming back soon.

Areas where Product Variety made a positive impact on the customer experience:

- Wide variety of products
- Full range of categories and sizes
- Selection matches or exceeds online
- Frequent new arrivals and drops

3. **Processes**

Store cleanliness stood out as a contributor to customer satisfaction. Specifically:
- Immaculately Clean Store
- Clean and Inviting Atmosphere
- Spotless Fitting Rooms and Facilities

Returns were the number one contributor to low customer satisfaction in the Luxury apparel retail segment.

Customers specifically mentioned the following issues negatively contributing to their satisfaction around returns:

- Strict Return Windows
- Tag/Condition Requirements
- Denied or Store Credit Only Refunds
- Inconsistent or Unclear Policies
- Warranty/Defect Handling
- Difficult Return Process
- No Returns on Sale/Final Sale
- Refund Errors or Delays

"Clean store and the clothing was well-organized so I could easily find what I needed."

LUXURY APPAREL

Recommendations for Luxury Retailers to Improve In-Store Customer Experience:

Optimize returns to create repeat customer traffic and delight, not complaints

● Implement RFID or similar technology to streamline the return process
● Clarify return policy at all points of sale and on receipts. Utilize electronic receipts to make it easier for customers to find their receipts and to enhance your loyalty program
● Actively promote ease of in-store returns and provide incentives for doing so

Make sure you have the right staff to develop long-term client relationships.

● Ensure your staff is socially adept to interact with all types of luxury shoppers. This may require various ages, ethnicities and multilingual associates.
● Utilize AI for staff training on store processes, new products and overall luxury fashion industry intelligence.

Most of these service and staff adjustments can be made relatively quickly and by integrating into your corporate culture and processes, will enhance customer instore experiences and likely lead to improved sales, profits and customer lifetime value (CLV).

	All Luxury	CX Leaders	CX Laggards	DIFF
TTL CSAT	63%	77%	55%	22pp
Product	75%	85%	62%	23pp
Processes	28%	59%	17%	42pp
Store	75%	84%	60%	25pp
Staff	64%	83%	48%	35pp
Location	76%	79%	64%	15pp
Service	58%	76%	34%	42pp
Pricing	57%	57%	17%	40pp

LUXURY APPAREL

Top 5

Store CX Leaders

1. PATAGONIA
2. ARC'TERYX
3. VERONICA BEARD
4. THEORY
5. VUORI

MID-MARKET
APPAREL

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MID-MARKET APPAREL

Customers at Mid-Market apparel retailers value staff, service and process as the most important factors contributing to sataisfaction or dissatisfaction of their shopping experience. These three factors made the bigggest difference in customer reviews and satisfaction, and can provide useful indicators to retailers for where to make small changes that can results in outsized benefits to the shopper experience.

The mid-market apparel leaders' scores were positively impacted by customer experiences across three areas, which were the biggest differentiators. between the leaders and the laggards:

1. Staff Helpfulness
2. Service Quality
3. Store Cleanliness

1. Staff Knowledge & Helpfulness Matter Most

While staff helpfulness, knowledge and engagement made the most positive impact on customer satisfaction, lack of professionalism was the number one contributor to negative experiences, followed by efficiency and communication.

Areas where Staff had detrimental effects on the customer experience:

- Disrespectful/Rude Behavior
- Unprofessional Attitude/Conduct
- Judgmental/Suspicious Treatment
- Lack of Acknowledgment/Overly Aggressive Sales

Areas where Staff made a positive impact on the customer experience:

- Attentive and Knowledgeable Service
- Personalized Assistance
- Multilingual Helpfulness
- Friendly and Welcoming Staff
- Patient and Thorough Support

"These guys are so nice - sales associate sat with me for 45 mins while I tried on a ton of pairs and debated. Helped me think through and test out, and order my ideal color.

Huge props to your team for making a new runner feel seen!"

MID-MARKET APPAREL

3. Processes Profoundly Impact Customer Experience

Store cleanliness stood out as a contributor to customer satisfaction.

Specifically:
- Consistently Clean and Organized
- Well-Maintained Facilities
- Pleasant Smell and Atmosphere

"Have been coming here for a while now & it's always so clean and neatly organized!"

Returns were the number one contributor to low customer satisfaction in the mdi-market apparel retailer segment, followed by inventory and lines at checkout.

Customers specifically mentioned the following issues negatively contributing to their satisfaction around returns:

- Inconsistent or Unclear Return Policies
- Strict or Unfair Return Timeframes
- Issues with Receipts or Proof of Purchase
- Refusal to Accept Defective or Used Items
- Refund or Exchange Processing Errors
- Store Credit Instead of a Refund
- Refusal to Accept Returns from Other Locations

2. Service Level Differentiates Retail Experience

Lack of responsiveness was the biggest contributor to negative customer experience by far.

Specifically, customers cited the following pain points:

- No Response or Ignoring Customers
- Unanswered Calls or Emails
- Slow or Unhelpful Problem Resolution
- Unfair or Discriminatory Treatment
- Rude or Dismissive Behavior

Areas where Service made a positive impact on the customer experience:

- Professional and Knowledgeable Service
- Quick and Efficient Service

"Every time I shop here, the experience is exactly what I'm looking for. The customer service is always amazing, the choices of what is available is also over the top! I would definitely recommend visiting this store if you're in the need of that customized size fit!"

MID-MARKET APPAREL

Recommendations for Mid-Market Apparel Retailers to Improve In-Store Customer Experience:

1. **Focus on returns to create repeat customer traffic and delight, not complaints**

- Implement RFID or similar technology to streamline the return process
- Utilize electronic receipts to make it easier for customers to find their receipts and to enhance your loyalty program
- Actively promote ease of in-store returns and provide incentives for doing so

2. **Use AI to let your staff focus on what counts: serving customers**

- Ensure you have adequate staff at the right time using AI-enabled scheduling
- Use AI for rote tasks to free up sales associate time for serving the customer
- Utilize AI for staff training whether via in-store tools (microphones, headsets, etc..) or self-serve training

3. **Optimize processes to reduce friction points for the shopper**

- Use Computer Vision or similar technology to identify peak customer traffic times, reduce queue times and identify lost customer experience and revenue opportunities
- Reduce friction at checkout by using technologies to speed up payment and reduce wait times such as cumputer vision, automated or mobile checkout
- Evaluate store cleanliness and ambience and identify ways to enhance via process improvements, new technology or out-of-the-box ideas to ehnance the vibes such as scent, experitnial enagement or audio

While changes in product, pricing or positioning can add up to long lead times, most of these adjustments can be made relatively quickly and unilaterally by the retail operations team.

Seemingly small changes in the customer experience can add up to big impact in the hearts, minds and wallets of your shoppers.

	All Mass	CX Leaders	CX Laggards	DIFF
TTL CSAT	66%	83%	36%	44pp
Product	79%	63%	63%	20pp
Processes	30%	53%	10%	43pp
Store	68%	82%	45%	38pp
Staff	67%	91%	29%	63pp
Location	69%	83%	62%	47pp
Service	69%	88%	29%	59pp
Pricing	71%	62%	39%	2pp

MID-MARKET
APPAREL

Top 5

Store CX Leaders

1. ALDO
2. DESTINATION XL
3. CARHARTT
4. MARINE LAYER
5. ON RUNNING

Clearance Blowout! **$5**
Pink Ticket Items

VALUE APPAREL

VALUE APPAREL

Value retail is not cheap retail, it's precision retail.

Past perceptions no longer apply. Realytics' data uncovered surprising findings, revealing that Value shoppers:

- Punish execution failures harder
- Demand clearer intent than Mass
- Care more about fairness and accuracy than absolute low prices

Key learnings from studying Value apparel data showed:

1. **Like their Luxury cousins, Value shoppers reject "middle ground" store experiences.**

For Value apparel shoppers, CSAT deltas are consistently negative, while Mass deltas cluster near neutral. Value shoppers:

- Penalize experiences that feel unclear inconsistent or average, more so than Mass shoppers.
- Don't reward "good enough". Neutral execution registers as failure.
- React more sharply when execution misses, accelerating dissatisfaction instead of absorbing friction.

__Bealls has been actively using AI agents for inventory and operational efficiencies since 2024.__

Value shopper dissatisfaction isn't subtle, it's structural. The data shows that when execution is merely "adequate", Value shoppers respond with clear negatives rather than indifference. So while Mass shoppers are thought to be more focused on in-store experience, they are in fact more tolerant of compromise than their Luxury and Value apparel peers.

"Nice clean and well kept store, a little pricey for the area but good."

"Fabulous experience! The store was clean and neat and everything was easy to find".

3. **Value apparel shoppers penalize operational friction more than Mass shoppers.**

The Value customer reacts more shpartly to operational friction because it directly undermines the clarity and efficiency they expect from the value proposition. The data shows when execution breaks down, dissatisfaction accelerates rather than flattens out, unlike in Mass apparel.

- Breakdowns in execution are immediately noticed and penalized
- When store experiences fall short, Value shoppers react more strongly than Mass shoppers, indicating heightened sensitivity to how well the experience is delivered
- Inconsistency in processes or pricing quickly undermines trust, reinforcing the importance of clarity, reliability and disciplined execution.

Conventional wisdom says Value shoppers "expect less" from a store. The data shows the opposite.

VALUE APPAREL

3. **Price *integrity* matters more to Value shoppers.**

Value shoppers have a strong sensitivity to price inconsistency or confusion, whereas Luxury and Mass pricing shows far less of this type of sensitivity, based on the data.

- **Disproportionate perception:** Even minor pricing inconsistency or confusion triggers an *outsized* dissatisfaction response rather than neutrality
- **Stronger linkage:** Unclear or inconsistent pricing quickly undermines trust and cascades into lower *overall* experience ratings.

Luxury shoppers tolerate high prices. Value shoppers won't tolerate wrong prices.

5. **Value shoppers are the most consistency-driven segment across categories.**

- **Stronger penalties:** Data shows the most consistently negative CSAT deltas when execution varies. Inconsistencies in processes, pricing or in-store cues are punished more heavily by Value shoppers
- **Sensitivity to fundamentals:** Compared with Mass (clustered near neutral), Value shoppers show larger negative shifts across core operational areas, especially processes and pricing

- **Consistency over brand:** Unlike Luxury, where brand equity softens execution misses, Value lacks a brand buffer in the data. Inconsistency directly translates into dissatisfaction.

When Value underperforms, it underperforms everywhere, which is surprising because retailers often assume that Value shoppers compartmentalize (price is all that matters). Instead, they appear to be more holistic score keepers. This means one broken promise can poison the entire perception for Value shoppers, making Value retail systemically more fragile. Small problems can have a bigger impact than for Mass or Luxury.

"They were so helpful, stayed open just a few minutes so I could do a return. Their closed are top quality, extremely inclusive for all sizes. I come often and would recommend it for anyone and everyone."

6. **Value shoppers are less forgiving.**

Where Luxury shoppers will rationalize flaws, Value shoppers will not.

Mass shoppers will tolerate mixed signals, hybrid positioning and ambiguity, Value shoppers will not. CSAT scores showed that Value shoppers are emotionally binary: either the system works, or it doesn't deserve trust. Even staff are viewed as part of the overall engine, not a compartmentalized part of the service.

VALUE APPAREL

Recommendations for Value Apparel Retailers to Improve In-Store Customer Experience:

Obsess over consistency, not novelty

- The data shows Value shoppers penalize inconsistency more than any other segment. Improving the business starts with eliminating variation in pricing, processes, signage and execution across stores because reliability, not surprise, is what builds trust and satisfaction in this sector.

Fix operational fricton before adding experience layers

- Negative CSAT and impact deltas for Value spike when fundamentals break down. Investments should prioritize store flow, clear pricing, inventory availability and process simplicity ahead of experiential upgrades, which won't offset friction for this customer.

Treat pricing clarity as a CX discipline, not as a merchandising task.

- Price perception deltas are among the most negative for Value apparel, signaling that confusion or inconsistency quickly erodes loyalty. Tight governance around promotions, signage and shelf accuracy will deliver more CX lift than incremental assortment changes.

Value retailers lack a brand buffer, execution is the brand

- Without the insulation of prestige or emotional loyalty, every breakdown in pricing, process or store consistency is felt immediately by the customer, making disciplined execution the most powerful lever for improving satisfaction and performance.

One in-store technology stands out

Based on the overall data, the tech that would deliver the quickest and greatest boost to revenue for Value retailers would be electronic shelf labels (ESLs) with centralized price governance. Value shoppers are the most sensitive to inconsistency, delivering some of the strongest negative shopper reactions.

Price confusion doesn't just hurt price perception, it cascades into lover overall CSAT, making it a core trust signal not a siloed issue. For Value retailers, clarity beats creativity.

The data indicates that fixing pricing accuracy and consistency will deliver more immediate CX lift than investing in new experiences, layouts or promotions.

If execution is the brand, ESLs are the fastest way to protect it.

From the Realytics data a clear narrative emerges:

Value retail has the lowest margin for error, not the lowest expectations.

This means that Value shoppers are not price-first, they are consistency-first. When pricing, processes or store execution vary, even slightly, Value shoppers react more negatively than Mass shoppers, and almost as strongly as Luxury shoppers. This means traditional "value" tactics like complex promotions, frequent price changes (e.g. variable pricing), or uneven execution across stores will erode trust instead of create excitement.

What this changes in practice:

- Fewer, clearer prices outperform frequent promotional noise
- Uniform execution across stores matters more than adding new experiences
- Reliability builds more loyalty than chasing incremental price wins

Bottom Line:

For Value retailers, predictability beats discounting. Consistency beats lowering prices further. Make the experience more consistent, legible and dependable every time a customer walks in to truly win.

	All Value	CX Leaders	CX Laggards	% DIFF
TTL CSAT	61%	82%	49%	33pp
Product	79%	87%	76%	10pp
Processes	27%	45%	13%	32pp
Store	62%	83%	49%	35pp
Staff	52%	81%	30%	51pp
Location	73%	75%	70%	6pp
Service	68%	82%	61%	21pp
Pricing	81%	88%	88%	0pp

VALUE APPAREL

Top 5

Store CX Leaders

1. RENYS
2. BIG & TALL OUTLET
3. SIERRA
4. BEALLS
5. FACTORY CONNECTION

SUMMING IT UP

→

Looking across all three categories together, here are five immediate, cross-segment actions that the data consistently surfaced:

1. **Eliminate execution variability before investing in experience**
Across all three segments, the largest CSAT gaps appear where store execution varies most. Standardizing processes, signage, pricing accuracy and store flow will deliver faster satisfaction gains than adding new experiential elements.

2. **Treat pricing clarity as a CX pillar, not a promotional tactic**
Price confusion damages trust in every segment, especially Value, but even Luxury shows erosion when pricing feels inconsistent. Simplify promotions, tighten price governance and ensure that shelf, digital and POS prices always align. Implement variable pricing with caution!

3. **Design for consistency, then layer differentiation.**
Value shoppers punish inconsistency, Mid-Market shoppers tolerate, but don't reward it and Luxury shoppers expect it as a baseline. Consistent execution is a prerequisite for differentiation in all segments.

4. **Focus frontline teams on process reliability, not upsell pressure.**
Staff impact is strongest when associates reduce friction – guiding, clarifying and resolving issues rather than pushing add-ons. Empower teams to fix problems in the moment and protect experience integrity.

5. **Measure and manage the spread, not just the average.**
Category averages mask enormous leader-to-laggard gaps. Track variance at the store level, identify where execution breaks down and prioritize closing those gaps. Because the spread is where the profit and loyalty are hiding.

Regardless of price tier, retailers win fastest by tightening fundamentals. Experience doesn't fail because it isn't exciting enough. It fails because it isn't consistent enough!

MEET THE RETHINK ADVISORY EXPERTS

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