# **U.S. Apparel Manufacturers Survey**



## Impact of Network Relational Characteristics on Emerging Small Manufacturing Organizations' Development and Linkages'

You are invited to participate in a research project that will help us better understand the range of opportunities and challenges experienced by a variety of firms involved in production of fashion and outdoor products and services. You were selected as a possible respondent because you are participating in an apparel manufacturing industry. We request that you read this form and ask any questions you may have before agreeing to be included in the study.

This study is being conducted by Nancy Miller and Carol Engel-Enright in the Department of Design and Merchandising at Colorado State University. All questions and procedures involved in the study were examined by The Institutional Review Board at Colorado State University (009-18H). If you have any questions about your rights as a volunteer in this research, please contact them at RICRO\_IRB@mail.colostate.edu; or 979-491-1553.

#### STUDY PURPOSE:

This study centers on collecting data from a range of businesses that are involved in U.S. fashion and outdoor apparel industries. Our overall aim is to generate information that will enhance the development of manufacturing in rural and urban communities.

## NUMBER OF PEOPLE TAKING PART IN THE STUDY:

We are contacting approximately 2500 business owners, managers, and workers requesting participation in our study.

### PROCEDURES FOR THE STUDY:

You must be 18 years or older to participate in this study by completing an online web survey on your computer. The survey asks basic demographic questions and questions about your experiences in industry, how you gain knowledge about the industry, as well as opportunities and challenges related to apparel manufacturing. You will be asked to complete the survey once, and the total administration should last approximately 15 to 20 minutes.

## RISKS OF TAKING PART IN THE STUDY:

Your participation in this online survey involves risks similar to a person's everyday use of the internet. The risks associate with responding to this online survey are minimal as we will work to ensure confidentiality to the

degree permitted by technology. We will minimize risk of identification by not associating any identity information with your responses, and never mention this information when reporting our findings.

While completing the survey, you may decline to answer any question(s) you choose and may stop participating at any time throughout the survey. The survey instrument will give you an approximate percent remaining so you can assess your progress in the 15-20 minutes estimated as time for completion.

#### BENEFITS OF TAKING PART IN THE STUDY:

We do not believe there are any direct benefits to the participants for competing this survey. More widely, we believe the findings will assist apparel firms involved in fashion and outdoor products manufacturing develop, acquire knowledge, and build linkages that enhance innovation.

#### CONFIDENTIALITY:

Efforts will be made to keep any identifying information you provide confidential to the extent allowed by law. We will use a numeric code for all responses and store the information under lock and key. Your private information collected for this study will not be used or distributed for future studies and when we write about our findings, we will combine the information gathered.

#### PAYMENT:

There is no payment for participating in this study.

## **CONTACTS FOR QUESTIONS:**

For questions about the study, contact the researcher Dr. Nancy Miller at 970-491-5811 or via e-mail at nancy.miller@colostate.edu.

## **VOLUNTARY NATURE OF THE STUDY:**

Taking part in this study is voluntary. You may choose not to take part in the study or you may decline to answer any questions(s) you choose and may stop participating at any time throughout the survey. Leaving the study will not result in any penalty or loss of benefits to which you are entitled. Your decision whether or not to participate in this study will not affect your current or future relations with the investigators.

If you agree to participate in this study, please press the button to continue. If you do NOT agree to participate, please close your browser window and exit the survey.

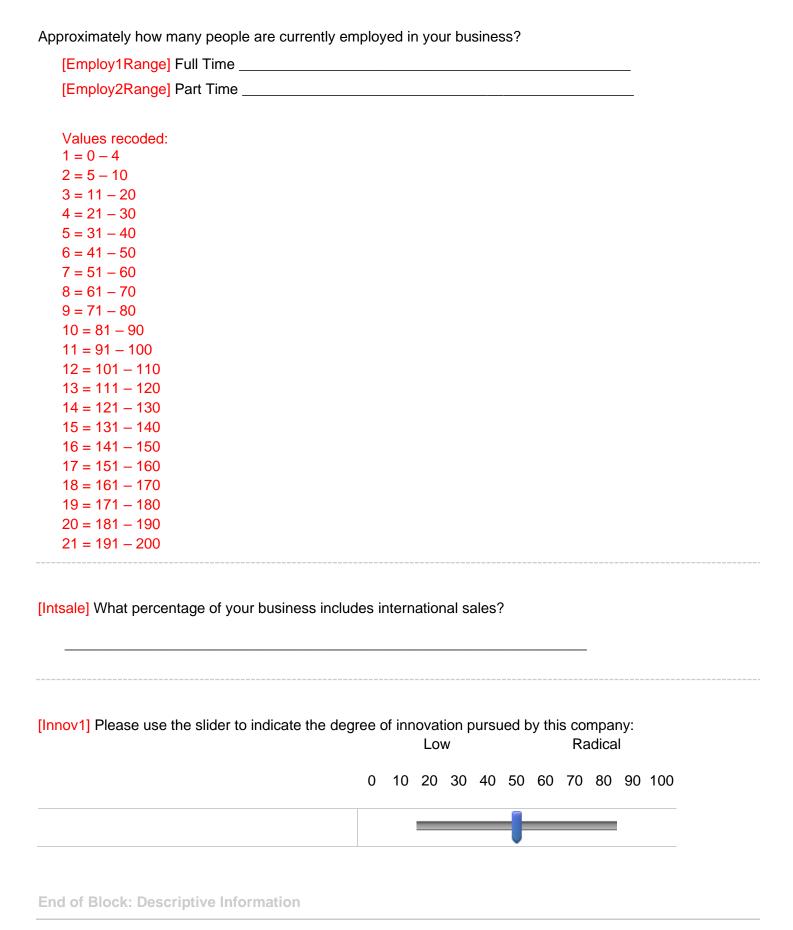
Please feel free to zoom in on your screen if some items of text in this survey are too small. The formatting of this survey does not allow us to make the text larger, but zooming in on your screen will enlarge the text. This survey is most accessible and easy to complete when done on a computer or tablet (as opposed to a smart phone).

Please refer to the progress bar at the top of every page to check your progress in the survey completion.

**Start of Block: Descriptive Information** 

[variable removed] What is your title in the company?
[Priexpt] Prior to working with this firm/company, how much related expertise did you hold relative to your position?
O [1] No related expertise
O [2] Very little expertise
[3] Average amount of expertise
[4] More than average amount of expertise
○ [5] A great deal of expertise
[Busstart1] Which one of the following best describes your business start-up?
[1] Independent Start-Up: founded by you
[2] Spin-Off: you were once an employee in this field, but left to start your own business
[3] Incubator-Driven: your business was created, founded, and built within an incubator
○ [5] Purchased an existing business
O [4] [Busstart1TXT] Other:
[Ent3] Are you a calculated risk-take and have a desire to grow the business?
○ [1] Yes
○ [2] No

[Busphase] W	Which one of the following phases best describes your current business?
○ [1] Pre	e-startup phase
○ [2] Ea	rly development phase
○ [3] Gro	owth phase
○ [4] Ma	ature phase
[Locat] Please	e indicate all that apply to your current business location:
	[1] in an urban community
	[2] in a rural community (population less than 50,000)
	[variable removed] Other:
[BusstartRan	ge] In what year did (or will) your business launch?
Values re	
1 = 2016 2 = 2011	
3 = 2006	<b>– 2010</b>
4 = 2001	
5 = 1996 6 = 1991	
7 = 1986	<b>– 1990</b>
8 = 1981 9 = 1976	
10 = 1976	
11 = 1966	
12 = 196°	
13 = befo	NETROT



Please use the scale below to indicate how important you find each variable to be.

	[1] Not important	[2] A little important	[3] Somewhat important	[4] Moderately important	[5] Important	[6] Very important	[7] The most important
[SI1] Maintaining close social relationships with your industry partners	0	0	0	0	0	0	0
[SI2] Knowing your industry partners on a personal level	0	0	0	0	0	0	0
[NT1] Developing an active network of external relationships	0	0	0	0	0	0	0
[NT2] Developing supply chain relationships	0	$\circ$	0	0	$\circ$	$\circ$	0
[NT3] Geographical proximity between users and manufacturers in terms of advancing firm success	0	0	0	0	0	0	0
[NT4] Social proximity in relationships between users and manufacturers in terms of advancing firm success	0	0	0	0		0	

Please indicate how important the following variables are in advancing your business:										
	[1] Not important	[2] A little important	[3] Somewhat important	[4] Moderately important	[5] Important	[6] Very important	[7] The most important			
[NT5] Common values	0	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$			
[NT6] Reciprocity with contacts	0	0	0	0	0	0	0			
[NT7] Trust in contacts	0	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$			
[NT8] New product development and commercialization	0	$\circ$	0	0	$\circ$	$\circ$	0			
[NT9] International entry and access	0	$\circ$	0	0	$\circ$	0	$\circ$			
[NT10] Linkages to new users and suppliers	0	0	0	0	0	0	0			

Please indicate below how important each variable of knowledge is to your business's innovation process:

	[1] Not important	[2] A little important	[3] Somewhat important	[4] Moderately important	[5] Important	[6] Very important	[7] The most important
[AC1] Internal sources of knowledge	0	0	0	0	0	0	0
[AC2] Outside sources of knowledge	0	$\circ$	0	0	0	$\circ$	0
[AC3] Acquiring new knowledge in problem- solving	0	0	0	0	0	0	0
[AC4] Research and Development (R&D) branch/es of your firm in generating new knowledge	0	0	0	0		0	0

Please indicate how important the following variables are in advancing product development in your business:

	[1] Not important	[2] A little important	[3] Somewhat important	[4] Moderately important	[5] Important	[6] Very important	[7] The most important
[NPD1] Equipment suppliers	0	0	0	0	0	0	0
[NPD2] Materials suppliers	0	$\circ$	$\circ$	0	$\circ$	$\circ$	$\circ$
[NPD3] Customers of the industry's products	0	0	0	0	0	0	0
[NPD4] Specific fields of science	0	0	0	0	0	0	0
[NPD5] Government laboratories and agencies	0	0	0	0	0	0	0
				O			

Please indicate how important the following <u>planning strategies</u> are for your business:

	[1] Not important	[2] A little important	[3] Somewhat important	[4] Moderately important	[5] Important	[6] Very important	[7] The most important
[PS1] Seeking production closer to business location	0	0	0	0	0	0	0
[PS2] Offering customized products or services	0	0	0	0	0	0	$\circ$
[PS3] Specializing in a narrow range of products or services	0	0	0	0	0	0	$\circ$
[PS4] Offering cutting-edge, innovative products or services	0	0	0	0	0	0	0
[PS5] Exchanging information with business outside your community	0	0	0	0	0	0	0
[PS6] Using new technology	0	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$
[PS7] Developing your own professional skills as a business owner/manager	0	0	0	0	0	0	0

Please indicate how important the following goals are for your business:

	[1] Not important	[2] A little important	[3] Somewhat important	[4] Moderately important	[5] Important	[6] Very important	[7] The most important
[BG1] Increasing personal income opportunities	0	0	0	0	0	0	0
[BG2] Meeting challenges	0	$\circ$	$\circ$	$\circ$	0	0	$\circ$
[BG3] Personal growth	0	$\circ$	$\circ$	0	$\circ$	$\circ$	$\circ$
[BG4] Proving that "I can do it"	0	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$
[BG5] Maintaining personal freedom	0	0	0	0	$\circ$	0	0
[BG6] Being your own boss	0	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$	$\circ$
[BG7] Securing a future for family members	0	0	0	0	0	0	0

**End of Block: "How important" Questions** 

Start of Block: Agree/Disagree Questions

	[1]	[2]	[3]	[4] Neither	[5]	[6]	[7]
	Strongly disagree	Disagree	Somewhat disagree	agree nor disagree	Somewhat agree	Agree	Strongly agree
[ENT1] I am willing to take risks to advance my business.	0	0	0	0	0	0	0
[ENT2] I have a strong desire to keep my business growing.	0	0	0	0	0	0	0
[SI3] My business would benefit from development of additional or more diverse social relationships across the industry.	0	0	0	0			
[RQ1] In our business relationships, both sides avoid making demands that can seriously damage the interests of the other.	0	0		0			

IRQ2 In our business relationships, neither side takes advantage of the other even if the opportunity arises.	0	0	0	0	0	0	0	
[RQ3] Our industry partners always keep their promises to us.	0	0	0	0	0	0	0	
[NT11] We have received new business partnership contacts through our existing business partners.	0	0	0	0	0	0	0	
[NT12] Our business partnerships have opened the doors for other partnerships for us.	0	0	0	0	0	0	0	

	[1]	[2]	[3]	[4] Neither	[5]	[6]	[7]
	Strongly disagree	Disagree	Somewhat disagree	agree nor disagree	Somewhat agree	Agree	Strongly agree
[KA1] Because we work with others in the industry, we have been able to obtain a tremendous amount of market knowledge.	0	0	0	0	0	0	0
[KA2] We get most of our valuable information on customer needs and trends from our business suppliers.	0	0	0	0	0		0
[KA3] Because we have strong business relationships, we are able to obtain a tremendous amount of technical knowhow related to supplying our product/service.	0					0	0
[KA4] We get most of our valuable technological know-how from these types of business relationships.	0	0	0	0			0

[KA5] I believe that it is critical to send personnel for advanced technical training.	0	0	0	0	0	0	0	
[NPD6] Most of our innovations result from borrowing rather than invention.	0	0	0	0	0	0	0	
[NPD7] Significant performance improvements are usually conceived and prototyped by users, not manufacturers.	0	0	0	0	0	0	0	
[NPD8] Strategic collaborative efforts across firms reduces needless duplication of effort and unproductive paths.	0	0	0	0	0	0	0	

	[1]	[2]	[3]	[4] Neither	[5]	[6]	[7]
	Strongly disagree	Disagree	Somewhat disagree	agree nor disagree	Somewhat agree	Agree	Strongly agree
[TD1] Our technology is better than our competitors' technology.	0	0	0	0	0	0	0
[TD2] Our competitive advantage is based on our technology.	0	0	0	0	0	0	0
[TD3] We invest very heavily in Research and Development (R&D).	0	0	0	0	0	0	0

	[1]	[2]	[3]	[4] Neither	[5]	[6]	[7]
	Strongly disagree	Disagree	Somewhat disagree	agree nor disagree	Somewhat agree	Agree	Strongly agree
[KOC1] The organization is a very personal place. It is like an extended family. People seem to share a lot of themselves.	0	0	0	0	0	0	0
[KOC2] The organization is a very dynamic and entrepreneurial place. People are willing to stick their necks out and take risks.	0	0	0	0	0		0
[KOC3] The organization is a very formalized and structured place. Bureaucratic procedures generally govern what people do.	0	0	0	0	0		0
[KOC4] The organization is very production oriented. The major concern is getting the job done. People aren't very personally involved.	0	0	0	0			

[HOT1] The glue that holds the organization together is loyalty and tradition. Commitment to this firm runs high.	0	0	0	0	0	0	0
[HOT2] The glue that holds the organization together is a commitment to innovation and development. There is an emphasis on being first.	0	0	0	0	0	0	0
[HOT3] The glue that holds the organization together is formal rules and policies. Maintaining a smooth-running institution is important here.	0	0	0	0	0	0	0
[HOT4] The glue that holds the organization together is the emphasis on tasks and goal accomplishment. A production orientation is commonly shared.	0	0	0	0	0	0	0

	[1]	[2]	[3]	[4] Neither	[5]	[6]	[7]
	Strongly disagree	Disagree	Somewhat disagree	agree nor disagree	Somewhat agree	Agree	Strongly agree
[SE1] If I feel like just talking, I usually can find someone in the industry to talk with.	0	0	0	0	0	0	0
[SE2] People who work in this industry are trustworthy.	0	0	0	0	0	0	0
[SE3] People are willing to share information about the industry with me.	0	0	0	0		0	0
information about the industry	0	0	0	0			

Please indicate how strongly you agree or disagree with each of the following statements: [2] [1] [3] [4] [5] [6] [7] Neither Strongly Somewhat agree nor Somewhat Strongly disagree agree Disagree disagree disagree agree Agree [EE1] The people in the industry really care about the fate of this business. [EE2] If given a chance, I would brag about this industry as a good place to build a business. [EE3] I am satisfied with the amount of support my business receives from the industry. **End of Block: Agree/Disagree Questions** Start of Block: Open-ended and Misc. Questions [NPD12] Please indicate or estimate how many new products, services, or technologies your firm has developed specifically as a result of key industry relationships.

[Indrecat] My	strongest industry relationships are	with (s	select	all that	t apply	):				
	[1] Suppliers									
	[2] Manufacturers									
	[3] Retailers									
	[4] Ultimate customers									
[Perf1] Pleas sales revenu	e use the slider to indicate your over e in 2018.							ercenta 80 90		our total
<mark>[KA6]</mark> Please new products	use the slider to indicate the availab s.							eel is r		d to develop
		0	1	2	3	4	5	6	7	
[Perf2] Pleas	e use the slider to indicate how succ			eel you succes 2				whole. ccessfi 6		
					=					

[Perf3] Please use the slider to indicate how successful you feel your business has been in achieving your goals. Not very successful Very successful 0 1 2 3 5 7 6 [NetProf] Relative to your direct known competitors, how would you rate your net profits? Please use the slider to indicate. Much better Much worse 2 3 7 [SaleGrow] How would you rate your sales growth relative to your direct known competitors? Please use the slider to indicate. Extreme growth No growth 0 2 3 5 7 [Innov2] How would you rate your innovation in products and services relative to your direct known competitors? Please use the slider to indicate. Very little innovation Extreme innovation 0 2 3 5 7

[CostCon] How would you rate your cost control relative to your direct known competitors? Pleasing slider to indicate.  Poor Excellent	ease
0 1 2 3 4 5 6	7
use the slider to indicate.  Low satisfaction  Total satisfactio  0 1 2 3 4 5 6	on 7
[Educ] What is your highest level of education?	
[Educ] What is your highest level of education?  [1] High school diploma/GED	
O [1] High school diploma/GED	
<ul><li>[1] High school diploma/GED</li><li>[2] Some college credit, no diploma</li></ul>	
<ul> <li>[1] High school diploma/GED</li> <li>[2] Some college credit, no diploma</li> <li>[3] Trade/technical/vocational training or Associate degree</li> </ul>	

outdoor industry and production of goods?
O [1] No knowledge
O [2] Very little knowledge
O [3] Average amount knowledge
[4] More than average amount of knowledge
○ [5] A great deal of knowledge
○ [6] N/A
[Gender] What is your gender?
O [1] Male
O [2] Female
O [3] Other/Prefer not to answer
[AgeRange] What is your age (in years)?
Values recoded:
1 = 26 - 30
2 = 31 - 35 3 = 36 - 40
4 = 41 - 45
5 = 46 - 50
6 = 51 – 55
7 = 56 - 60 8 = 61 - 65
9 = 66 - 70
10 = 71 - 75
11 = 76 - 80

12 = 81 - 85

[variable removed] Is there anything else you would like to tell us about your experiences or perceptions of the manufacturing industry?
End of Block: Open-ended and Misc. Questions
We thank you for your time spent taking this survey. Your response has been recorded.