

LECTURA Flash Survey



Workwear

Global results



About LECTURA

LECTURA has been the leading provider of machinery intelligence on the market **since 1984**. Our database contains information and data on more than **147,778 heavy machinery models** and provides evaluation of used machines through our online tools and digital solutions.

This extensive database of equipment information attracts hundreds of thousands of professional visitors every month, when researching machinery before their purchase decision. This buyers guide represents the perfect platform to reach buyers and decision makers.

Our web portal LECTURA Press provides the latest news from the heavy machinery industry, exclusive interviews with industry experts and market leaders and publishes the quarterly online magazine the DigiMessenger in order to always bring the most relevant information to our readers.

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About LECTURA Flash Surveys

The world of heavy machinery incorporates many different industries and corresponding companies that manufacture either whole machines or suitable components. Moreover, some companies also provide services and solutions closely linked to heavy equipment like online trading platforms.

Flash surveys represent a new service by LECTURA that helps industry representatives to find out valuable opinions of our visitors – potential customers. The surveys are quick (hence “flash”) designed to run just 1-2 weeks. Nevertheless, our broad audience does not hesitate to participate, giving us the potential to reach 800 replies per day (depending on the chosen topic and targeting). It is an optimal way to achieve an important piece of market intelligence from construction, agriculture, and other related industries.

Where do the results come from? Our web portal LECTURA Specs visit more than **600,000 professionals monthly** and serve as the ultimate buyers’ guide. LECTURA Specs is a huge multi-lingual online database with almost **150,000 machinery models** enriched with specifications, datasheets, and daily updated pictures. Our audience consists of machine owners/buyers, dealers, engineers, contractors, farmers, repair shops, service providers, and other professionals that search for information via LECTURA services every day.

Flash Survey: Workwear

Workwear is the kind of utility clothing designed and built for manual labour. It is noted by its use of durable fabrics (more on those later) that can withstand daily wear-and-tear over long periods while still maintaining their quality and shape. Many wardrobe classics were designed for working in - like jeans, khakis, denim jackets, a chore coat or a chambray shirt. However, as the heavy industry goes forward, the workwear manufacturers had to face the challenges involved and adjust the design and properties of workwear to more demands.



Safety, wear resistance and comfort are the key factors in workwear for heavy industry. The workwear is of the utmost importance in enhancing worker efficiency. Many conditions in the heavy industry are required to protect workers against temperature conditions, sound, or risk of crashes and damage. The brands focusing on workwear manufacturing keep in mind the fact that work such as welding, forging or machine operation requires very special workwear to help people feel safe at work. Thus the current workwear market provides a variety of items from skin protecting coveralls, heavy boots to more sophisticated items like ear defenders or plugs and face masks.

METHODOLOGY

In the current survey, we were curious to explore what are the most popular workwear manufacturers. There are plenty of brands from which the most popular are Carhartt, Dickies, Caterpillar, or MASCOT. However, we also decided to inspect other factors: what items do people usually wear, in what conditions, and whether they think the workwear can protect them sufficiently. Because we also wanted to know who provides our respondents with the workwear, we asked them to report whether they receive it directly from their employer or whether they buy it by themselves.



The survey ran in two waves from 30th November to 14th December and from 22nd December to 10th January on international and German LECTURA Specs webpages. In total, 3943 respondents decided to participate in the survey, from whom we got 2762 valid responses to be further analyzed. Following the previous flash surveys, the current report provides the general global results.

WORKWEAR: Global Results

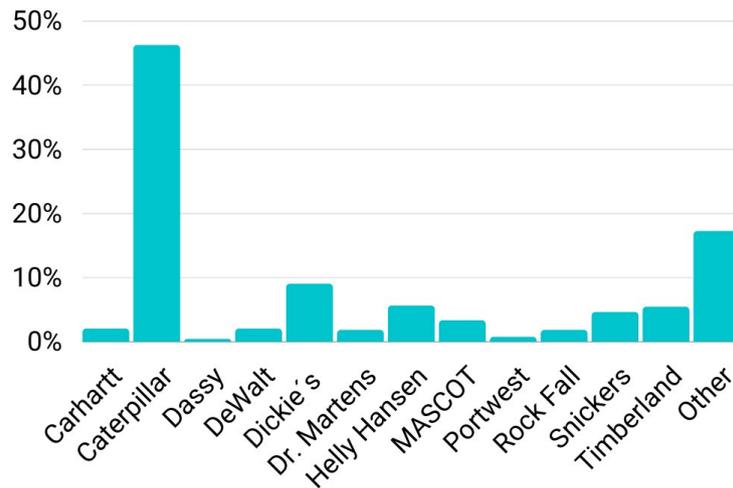
WHICH OF THE FOLLOWING WORKWEAR/FOOTWEAR BRANDS DO YOU USUALLY WEAR AT WORK?

To inspect the workwear preferences of various workwear manufacturers, we went through the previous research about this topic to select the top 12 manufacturers: Carhartt, Caterpillar, DASSY, DeWalt, Dickie´s, Dr. Martens, Helly Hansen, MASCOT workwear, PORTWEST, Rock Fall, Snickers, Timberland. However, keeping in mind even the current list would not be comprehensive enough, the option to list their preferred brand was still possible.



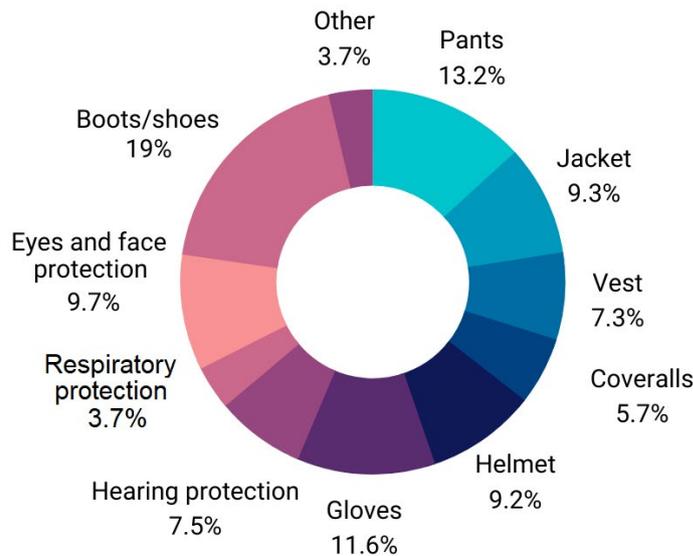
Interestingly, Caterpillar conquered the rank of preference. 46.2% of respondents claimed they usually wear their workwear. Thinking about the overall popularity of Caterpillar´s products, our results confirm their number one position. Even though the remainings were not as popular as Caterpillar, our respondents still spoke for their popularity. 9% of our respondents prefer Dickie´s followed by about 5% for Helly Hansen, Timberland, and Snickers. 3.3% of respondents usually wear

MASCOT workwear followed by 2% for Carhartt and DeWalt, and 1.8% of respondents favor brands like Dr. Martens and Rock Fall. Surprisingly only 0.7% of our respondents prefer PORTWEST, and 0.4% claimed they usually wore DASSY. Since we hoped all of the preselected brands would have at least similar popularity, the results did not say so. About 17.2% would choose another brand. From these, Blundstone and Red Wing, both footwear manufacturers, were mentioned repeatedly.



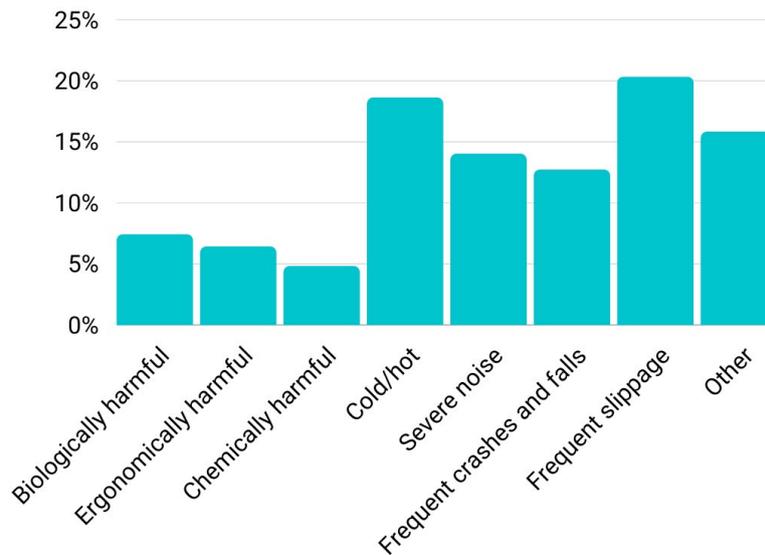
WHICH OF THE PROTECTIVE WORKWEAR/FOOTWEAR ITEMS ARE YOU REQUIRED TO WEAR AT WORK?

Then we were curious to explore not only what brands our respondents prefer but also which clothing items are they required to wear. The clothing items might vary from simple reflective vests to specialized ones like respiratory and hearing protection. As our results revealed, most of the respondents are required to wear boots (19%), followed by pants (13.2%) and gloves (11.6%). The usage of eyes and face protection (9.7%), jacket (9.3%), and helmet (9.2%) were less frequent but still high. 7.5% of people are required to wear hearing protection, and 7.3% wear vests. The remaining workwear items were not chosen as often as the previous, indicating their less urgency during work. Only 5.7% of people were required to wear coveralls, and 3.7% of respondents had to work with respiratory protection. Also, 3.7% indicated they need to wear other items. Though these respondents did not tell us what these items might be, various more specific clothing items exist, like for, example: flame-resistant clothing and balaclavas, knee pads, or aprons.



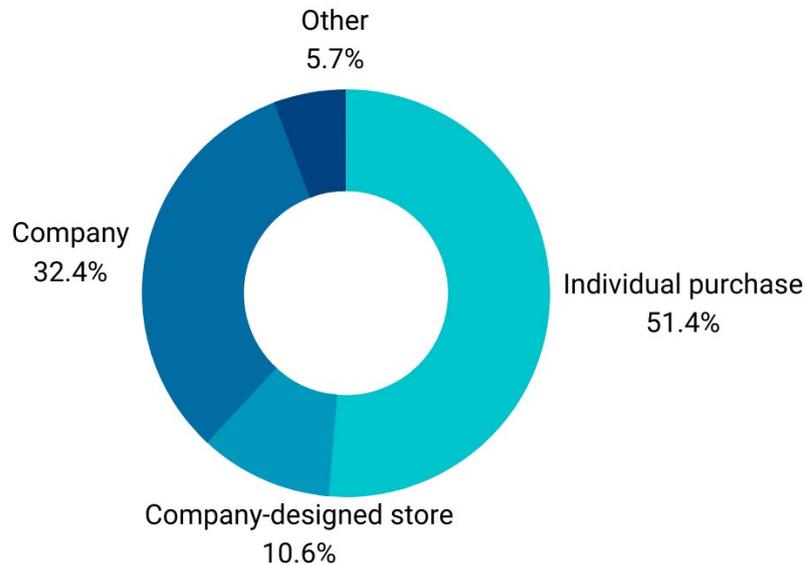
WHAT ARE THE CHARACTERISTICS OF YOUR WORK ENVIRONMENT?

After that, we wanted to know for what reason our respondents were required to wear protective clothing. Asking them about possible treatments of their workplace environment, we received the following responses: most people who participated in the survey work under the risk of frequent slippage (20.3%), followed by those who face challenging temperature conditions (18.6%). Also, those who work in an environment with severe noise (14%) or face a high risk of a crash and falls (12.7%) were frequently represented in our survey sample. However, the results of our survey revealed only a minimum of our respondents work in biological (7.4%), ergonomically (6.4%), and chemically (4.8%) environments. Although all these categories mentioned above fall in the most common work environment threats, 15.8% of respondents still indicated their work environment has different conditions. Since they did not provide us with what other conditions their workplace has, threats like exposure to electrical live parts, fire, or confined spaces may also exist.



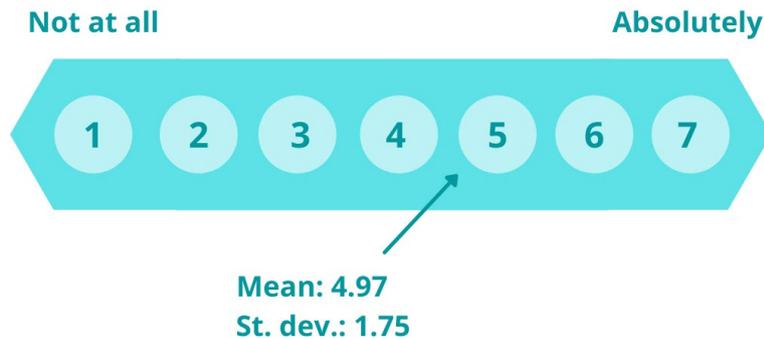
WHO PROVIDES YOU WITH THE WORKWEAR/FOOTWEAR?

According to previous research on the current topic, the question of who provides workers with sufficient workwear is also worth to be considered. As our results revealed, 51.1% of respondents had to buy their workwear individually. In some situations, the explanation might be straightforward since the laborers are sometimes hired for a short period (like on a day-to-day basis). However, despite possible threats to the work environment, sometimes people seek cheaper alternatives like outdoor clothing, which, on the other hand, can miss some features of specialized workwear. Thus we are pleasantly surprised the 32.7% of respondents received their workwear directly from their company. The employers of 10.5% of our respondents also participate in some cases in this topic, they have their company-designed stores, respectively. Only 5.7% of the respondents claimed they workwear elsewhere.



HOW MUCH DO YOU THINK YOUR WORKWEAR/FOOTWEAR CAN PROTECT YOU?

Not only factual information about our respondents' workwear but also the opinions of our respondents were relevant. The last question of our survey was about their perception of workwear safety. How much they think the workwear can protect them, respectively. Most of our respondents revealed they consider it somewhat efficient. On the scale from 1 for no protection to 7 for absolute protection, the mean was about 4.97.



Conclusion

Using the survey method, the current research helped us to describe from whom people in the heavy machinery industry obtain workwear (brand and provider), for what reason they wear it, and how they perceive its protectability.

Firstly, we discovered Caterpillar workwear is globally the most popular brand. The workwear market seems to be globalized, with only one leading brand. Because Caterpillar is also the leading manufacturer of construction and mining equipment, diesel and natural gas engines, and industrial gas turbines, we are not in doubt Cat clothing has a lot to offer.

Our survey then stepped aside from aiming at brand preferences and was concerned about other workwear-related issues - mainly related to the function and protectability of the workwear. When considering the items most often worn by employees, the results revealed that most of them are required to wear special boots or shoes. Because heavy machinery and related industries have a high risk of crashes, falls, and slippery surfaces, these findings are logical. After boots, also some basic items like pants and jackets were often reported. What surprised us positively was that employers do not forget to require the employees to wear head and facial protection. The gloves are often worn, too - not only because industry work requires manipulation with rough materials (which can cause abrasions or bruises) but also with hot/cold or somehow contaminated materials.

As the subsequent questions revealed, most of our respondents work in an environment with a risk of frequent slippage or cold and hot environments, followed

by an environment with a high risk of crashes on falls or sounds demands. These results may lead us to, let's say, naive, or at the first sight explanation of the previous findings. However, we would like to test the possible association rather empirically.

Finally, the survey also focused on the perception of the utility of the workwear. We found that most respondents considered their workwear somewhat protectable.

Though we believe these findings may be interesting, we aim to continue researching this topic, focusing on the possible associations between so far discussed variables. While currently working on the second part of this report, we see some evidence for the mentioned relationships. For those, who are interested in the following results, watch our report section on [LECTURA Press](#).

Interested in your individual survey?

Whenever you want to improve and grow your business conducting a survey may help you. Despite the fact that there are plenty of research methods or strategies to understand your customers' behaviour, the easiest way to get information about people is to simply ask them. Understanding your customers' perspective and needs provides you with the most important information about the future development of your business and therefore determining priorities of its direction. Moreover, ongoing communication with your customers and demonstration of the interest in their needs helps maintain their loyalty.

LECTURA can get your survey in front of hundreds of thousands of industry professionals – your potential customers due to our large audience. More than 600,000 professionals research equipment on our ultimate buyer's guide LECTURA Specs every month. Moreover, they are actively engaging with our polls and surveys. More specifically, the engagement is about 4% which results in about 800 daily replies. We provided our clients already with surveys focused on e.g. telematics, spare parts or equipment rating, having collected tens of thousands of answers.

When wondering about the targeting, LECTURA can select your respondents' sample based on some predefined criteria: region/country of origin, industry and type of business. To reach the criteria we are able to target to place your survey on specific web pages only or provide you with 8 language versions – English, German, Spanish, French, Italian, Dutch, Polish and Russian (for English, German, Spanish, French and Polish with translation, too). Moreover, we provide our survey in two formats. In the first one we can show the survey questions in a widget which

'peeps' from the bottom of the page. In the second format potential respondents are provided with a URL which can be given to them directly, such as including it in a newsletter email send out. However, we consider the former as more unobtrusive than the latter. Nevertheless, the final decision depends on your considerations. To make it more specific – the process of research collaboration with LECTURA is as follows. At the beginning we discuss the objectives of the research – who is it for, why, what information do you want to obtain via your survey. When all previously mentioned is clear, you create the questions which we place on the webpages. After some time, the data are collected and it depends on you whether you want to analyse them by yourself (we are able to provide you the raw data in .xls, .sav or .csv format) or let the LECTURA Surveys to analyse them for you and provide you with a comprehensive report of results. More about LECTURA Surveys: <https://www.lectura.de/surveys/>.

OTHER SURVEYS BY LECTURA

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