

The State of Men's Denim 2026



Cloomer

Executive Insights Report

Strategic Analysis for CX, Ecommerce,
Merchandising & Consumer Insights Leaders



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“ The second purchase is where brands are made or buried. ”

Foreword

Brand doesn't protect you when the jeans don't behave

For years, denim brands treated loyalty like an asset you accumulate; spend enough years in a customer's closet, and you're insulated from churn.

The data for 2026 completely dismantles that assumption.

Customers still buy jeans for fit, comfort, and style, and those themes show up with high positivity across the category. But repeat buying depends on something more practical: the confidence that what arrives will match what the customer expects.

When that confidence slips, customers don't always complain loudly. They do something more decisive: they switch.

That's why this report focuses less on trends and more on behavioral signals: what customers praise, what they doubt, and what triggers defection.

This report analyzes **55,287 customer reviews and independent opinions** (Aug 2022–Sep 2025) to answer one question: **What actually drives switching momentum in men's jeans, and how do brands protect it?**

The Six Personas Shaping the Category

To understand why customers switch, we must first understand who they are.

The US market is currently defined by six distinct segments with vastly different motivations and brand tolerances:

Segment	Market Share	Preferred Brands	The Critical Insight
Mainstream	47%	Levi's (72%) Gap (11%)	Seeks a balance of quality and value; currently frustrated by Levi's inconsistency and moving toward Old Navy.
Heritage Loyalist	18%	Levi's (83%) Old Navy (6%)	Defined by long-term loyalty to classic models, yet data shows this group is now highly inclined to switch.
Budget	13%	Old Navy (51%) Levi's (27%)	Purely price-driven, American Eagle saw massive 2025 growth here via aggressive seasonal campaigns.
Durability & Workwear	11%	Levi's (53%) Old Navy (22%)	Values functional performance. Levi's dominates share but lags in satisfaction, leaving a gap for rivals.
Fashion Forward	9%	Abercrombie (26%) Old Navy (25%)	The most satisfied cohort (89% positive); highly influenced by social media and peer trends.
Craft Aficionados	2%	Levi's (72%) Gap (11%)	Detail-obsessed enthusiasts often spend over \$100 per pair for material integrity.

What's New in 2026: The Sizing Paradox

The most dangerous trend in the category is the **Fit-Sizing Gap**.



The Conflict

E-commerce **Fit Equity** is strong (**87.7%**), but Sizing Reliability is **59.3%**. Yet physically, wearing satisfaction hits **95.7%**, while reorder **Size Consistency** collapses to just **16.5%**.



The Result

This unpredictability forces customers to "bracket" (buying 3-4 pairs to keep one), creating **3-4x more operational touches** per purchase and eroding LTV through constant returns.



The Switching Driver

Nearly **50% of outbound switching** is now driven by gaps in quality, durability, and consistency rather than style preference.

Brand Momentum: Winners vs. Losers

The market is currently reallocating share based on execution:



Levi's is bleeding

Despite its massive scale, it suffered a net loss of 35 in switching dynamics, losing 80 customers for every 45 it gained.



Execution Leaders

American Eagle (+33), Gap (+29), and Old Navy (+25) are capturing 91% of positive switching.



The "Support" Purchase

Campaigns like American Eagle's "Sydney Sweeney" ads have successfully turned brand perception into identity-driven acquisitions, even for lifelong Levi's wearers.

The 2026 Strategic Mandate

In US ecommerce, market leadership now belongs to brands that **remove purchase risk** before attempting differentiation.



Stabilize Product Integrity

Fix "careless" Product Detail Page (PDP) errors regarding fabric composition and hardware to prevent "misleading" labels from customers.



Fix Sizing Precision

Enforce manufacturing tolerances to ensure a "34 waist" is identical across different washes and production runs.



Differentiate at the Edges

Once the core execution is reliable, expand into emerging high-growth areas like **Body Type Compatibility** (90%+ positivity).

Research Foundation

If denim is a repeat category, then experience consistency is the only compounding advantage.

Men's jeans don't lose loyalty in a single viral moment. They lose it in small inconsistencies that make reordering feel like a gamble: the same size fits differently, the fabric feels thinner, the wash looks off, the listing doesn't match what arrives. This chapter sets the discipline behind the report: what we analyzed, how we structured it, and why these metrics surface a competitive truth that single-score CX reporting tends to blur.

KEY NUMBERS

55,287

total reviews analyzed

119,417

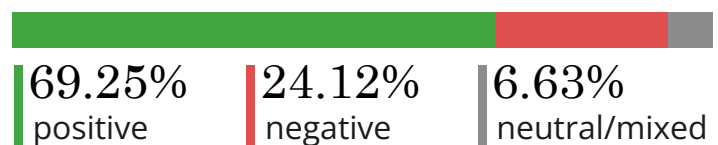
total opinions extracted

(one review can generate
multiple theme-level opinions)

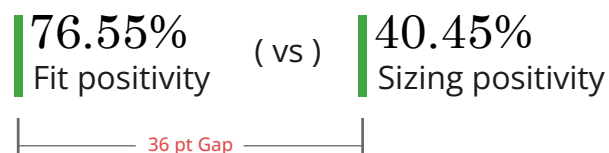
\$50–\$75 (33.10%)

Category "center of gravity"
price band

Overall sentiment mix



The category's defining gap



1.1

Data scope & coverage

1.1.1 Volume of customer conversations analyzed

This study analyzes **55,287** customer reviews and discussions, structured into **119,417** opinions.

- **Reviews/discussions** are the raw customer conversations.
- **Opinions** are the discrete experience statements extracted from those conversations across drivers like Fit, Sizing, Comfort, Material, Durability, and more.



WHY THIS STRUCTURE MATTERS

Customers rarely evaluate jeans on one dimension. Opinion-level analysis preserves the driver mix that gets flattened in review-level averages.

1.1.2 Time period and seasonality coverage

The analysis covers **Aug 2022 – Sep 2025**, spanning multiple annual cycles. The intent is to measure persistent experience patterns, not overfit to a single season or campaign window.

1.1.3 Brands, channels, and platforms included

Customer discussions were sourced from major e-commerce platforms such as **Amazon, Target, Walmart, Macy's, and official brand stores**.

Core brands in scope:
Levi's, Old Navy, Gap, Abercrombie, American Eagle, Calvin Klein.

1.1.4 Segmentation logic (price, fit style, brand)

We segment the experience using the same lenses customers use to make denim decisions:

PRICE BANDS

(to isolate value vs quality vs expectation gaps)

\$50–\$75		33.10%
\$25–\$50		28.42%
\$0–\$25		22.55%
\$75–\$100		16.48%
\$100+		5.70%

FIT STYLES

(to separate silhouette preference from sizing-system friction)

Straight fit		34.90%
Slim fit		28.87%
Baggy fit		9.09%
Taper fit		7.64%
Bootcut		6.99%

Brand benchmarking: Used to distinguish category-level issues (everyone experiences) from brand-level execution gaps (where competitors gain switching momentum).

1.2

Analytical framework

1.2.1 Sentiment scoring methodology

The primary health indicator used throughout the report is **Positivity %**

Positivity % = the share of positive opinions within a theme, sub-theme, or segment.

We also track **negative** and **neutral/mixed** signals to avoid false confidence when feedback is ambiguous. This is intentionally driver-level: it shows where the experience **holds** versus where it **breaks**, rather than smoothing everything into a single average.

1.2.2 Jobs-to-be-done model

Themes tell you what customers talk about. **Jobs-to-be-done (JTBD)** explains what customers are trying to accomplish.

For Example: ☐ **Theme :** Sizing Job: "Buy once and reorder confidently."

JTBD is how feedback becomes decision-grade. **"Improve sizing"** is vague. **Protect reorder** confidence is actionable. The report quantifies this with a **Fulfillment Score (1-5)**: how reliably a brand meets the underlying job customers are hiring denim to do.

1.2.3 Net switching behavior logic

Switching is measured using directional movement in customer language.

We express this as **Net Flux**.

► **Primary signal**

Explicit switching
("switched from X to Y")

► **Secondary signal**

Intent language
("trying," "considering," "leaving")

Net switching (Net Flux)

= Inbound switching mentions – Outbound switching mentions.

This is a preference movement indicator (not audited sales or market share), designed to reveal where momentum is building or leaking.

1.2.4 Theme performance vs. volume analysis

Every theme is evaluated on two

Volume

(how much it shapes the category conversation).

Performance

(positivity within that theme).

This prevents two classic mistakes

Chasing low-volume edge cases that don't move outcomes, and ignoring high-volume friction because the overall average looks **"fine."**

1.2.5 Multi-level theme analysis (what makes this report different)

This report uses **multi-level, unsupervised theme analysis** so the reader can move from broad drivers to root causes without guesswork:

Theme → Sub-theme → Actionables (root-cause drivers).

This hierarchy is what allows the report to say more than “Sizing is a problem.” It can pinpoint which parts of sizing (e.g., accuracy, consistency, waist/length precision) are driving dissatisfaction and switching risk.

1.3 --- Core metrics defined

1.3.1 Positivity rate

Definition:

The share of positive opinions within a theme/ sub-theme/ segment.

Why it matters in denim:

It isolates reliability. Denim doesn’t churn because customers **“feel negative.”** It churns when repeat outcomes become uncertain.

Fit positivity

76.55%

Sizing positivity

40.45%

A defining category signal in this dataset:

This gap is where reorder confidence breaks.

1.3.2 Share of voice

Definition:

The share of total opinions captured by a theme, sub-theme, or brand.

Why it matters:

It separates what’s merely mentioned from what’s shaping the category narrative at scale.

1.3.3 Net switching

Definition:

Directional preference movement expressed as Net Flux (inbound – outbound switching mentions).

Why it matters:

It answers the question that generic CX metrics cannot: when confidence breaks, where does the customer go?

1.3.4 Job fulfillment

Definition:

Fulfillment Score (1–5) for the core jobs customers hire jeans to do (reorder confidence, durable value, comfort without compromise, truth-in-spec).

Why it matters:

Brands don’t lose because a theme exists; they lose when the underlying job becomes unreliable.

1.3.5 Feature satisfaction

Definition:

Feature-level sentiment on a 1–5 scale, used to separate must-haves (high volume + high sentiment), need-to-haves (high volume + low sentiment), and true delighters (high sentiment, lower volume).

Why it matters:

It turns abstract “quality” and “comfort” into the specific attributes customers reward—and the ones that trigger returns and switching.

Brand, culture & perception dynamics

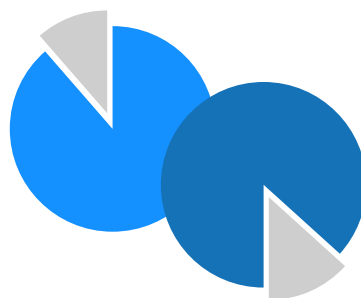
Why meaning, trust, and execution now behave like one system and how culture can drive trial while unboxing truth decides belief.

In 2026, a denim brand is under audit. Not audited by press, not even by influencers, by customers. In public. In real time. In the same sentence where they talk about fit, they talk about integrity: *Is this authentic? Is this what you showed me? Why does it smell like chemicals? Why is the stitching different from last time?*

The data paradox

● Levi's

89.6% positive brand perception +
net -35 switching outflow



● Old Navy

Lower brand prestige + 86.7%
overall positivity + net +25
switching inflow.

What this reveals

Customers can respect a brand while actively fleeing its execution. Brand affinity doesn't prevent defection when operational experience contradicts brand promise.

This is why brand equity and switching can coexist. Brand still wins the click.
But the experience decides whether the brand is believed.

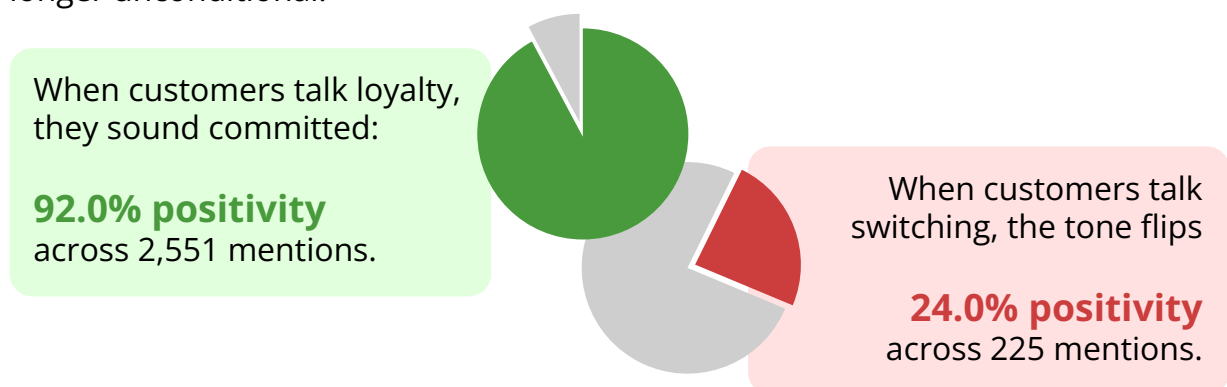
2.1

Brand equity vs conditional loyalty

The conditionality framework

Condition	Customer Expectation	Violation Consequence
Size labeled = size delivered	"The label is truth"	Immediate distrust
PDP accuracy	"Page matches product"	"Misleading" label (trust breach)
Delivery condition	"New means new"	Quality doubt/counterfeit concern
Returns fairness	"Policy won't punish me"	Permanent exit

The data makes one point unmissable: loyalty is still emotionally strong, but it's no longer unconditional.



That gap matters more than either number alone. It means switching isn't being discussed as a neutral trade-off ("I found something better"). It's being discussed as a **relationship break** ("I'm done"). The category has become emotionally sticky, but operationally unforgiving.

One brand illustrates the pattern at scale

Levi's carries the largest loyalty volume (**1,473 loyalty mentions at 89.6% positive**) while also taking the harshest switching tone (**170 switching mentions at 13.5% positive**).

That's what conditional loyalty looks like in practice: the most-loved brands also pay the highest penalty when the promise isn't kept.

What this implies for 2026

Brand equity is no longer a moat. It's a credit line. It helps you borrow a first purchase. But every inconsistency adds interest and switching is the default refinancing option.

Culture-driven conversion

Culture has changed conversion dynamics in denim in a way most brands still underestimate:

Cultural moments now compress the funnel.

Customers explicitly state they bought because of the moment—sometimes even “to show support”—and only then evaluate the product. That’s identity-led trial: the buyer chooses meaning first, jeans second.

This is where a lot of teams get the risk calculus wrong. They ask, “Will controversy hurt us?” The more accurate question in 2026 is:

? *“If a moment drives trial, are we operationally ready to keep the buyers it brings?”*

Because culture can create traffic. But retention is still governed by a different set of proofs:

? *Does the product match what was promised?*

? *Does the unboxing confirm trust—or trigger suspicion?*

? *Does the recovery (returns/exchanges) feel fair when reality differs from expectation?*

When identity overrides comparison

The pattern:

Some customers choose brands based on identity alignment rather than rational feature comparison.

The segments:

Political identity buyers: Choose/reject brands based on perceived values (Carhartt, Wrangler) - **Nostalgia buyers:** Revert to brands from their youth (Levi’s continuity heritage) - **Anti-corporate buyers:** Prefer legacy/authentic brands over “fast fashion”.

The business risk:

Identity-driven trial is sticky if execution doesn’t violate the identity promise. If a customer buys Levi’s for “authenticity” and receives inconsistent quality, the identity promise feels fraudulent—creating **double betrayal** (functional + emotional).

Block:

Culture can spike acquisition. **Execution determines whether the spike becomes a base.**

2.3

Two heritage narratives

Heritage isn't one story anymore. It has split into two - and each has a different "failure trigger."

Continuity heritage "I never left."

This is habitual loyalty—the brand as default uniform. It's supported by strong positive "history" language (78.4% positivity, 185 mentions). These buyers aren't shopping; they're replenishing.

What breaks it not trend shifts. **Trust fractures.**

A continuity buyer can tolerate a slightly different wash. They struggle to tolerate *variance that forces extra work* (re-order anxiety, bracketing, returns).

Comeback heritage "I left, but I'm trying you again."

This is re-acquisition: the buyer is willing to believe the brand has improved. You see it in "discovery/awareness" language (**73.5% positivity, 219 mentions**) - people testing a brand again because a signal pulled them back (product buzz, cultural relevance, even a moment).

What breaks it disappointment has a shorter fuse.

Comeback buyers are not loyal yet. They're auditing. One mismatch can turn "I'm back" into "never again."

What this implies for 2026

Heritage doesn't protect you. **It raises the standard.** A heritage brand isn't judged on "is it good?" It's judged on "is it still true?"



The authenticity crisis

Here's the shift that should make every denim leader uneasy:

Variation is being interpreted as counterfeit.

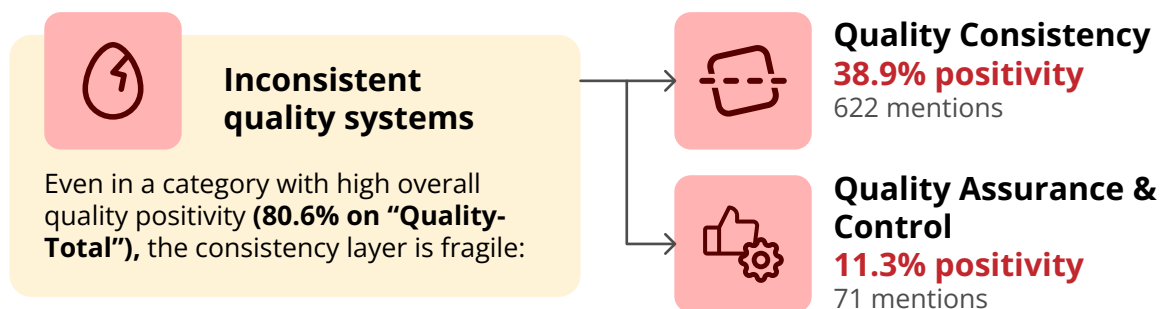
"Brand Authenticity" sentiment is weak:

42.5% positivity across 259 mentions. That sounds moderate until you look at what authenticity talk means in this category: customers aren't debating aesthetics - they're questioning legitimacy.

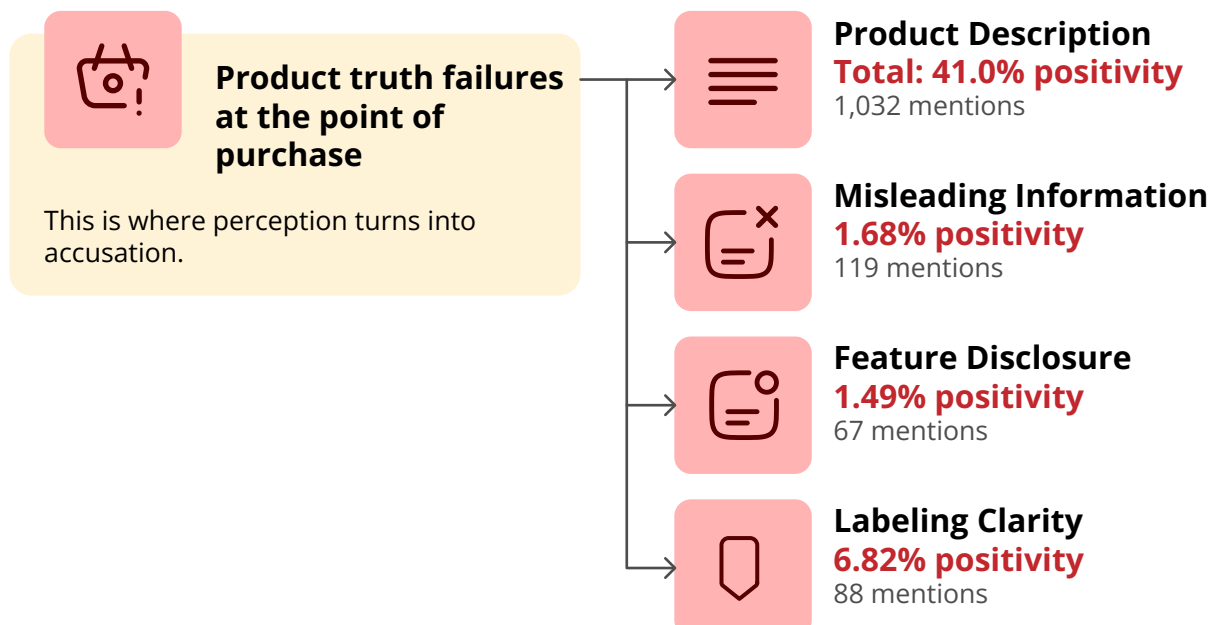
And notice where authenticity anxiety clusters: it's overwhelmingly attached to the most iconic, most widely distributed brands - brands whose "cues" (tabs, stitching, labels, wash identifiers) are recognizable enough for shoppers to play detective.

The trust stack that triggers authenticity doubt

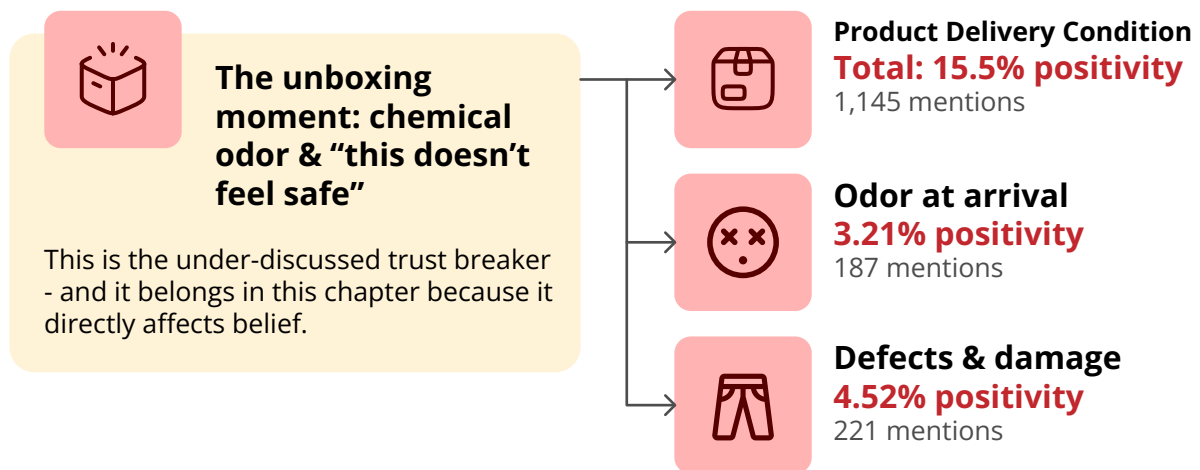
Authenticity suspicion doesn't come from one thing. It comes from **a stack of contradictions** that, together, feel like deceit:



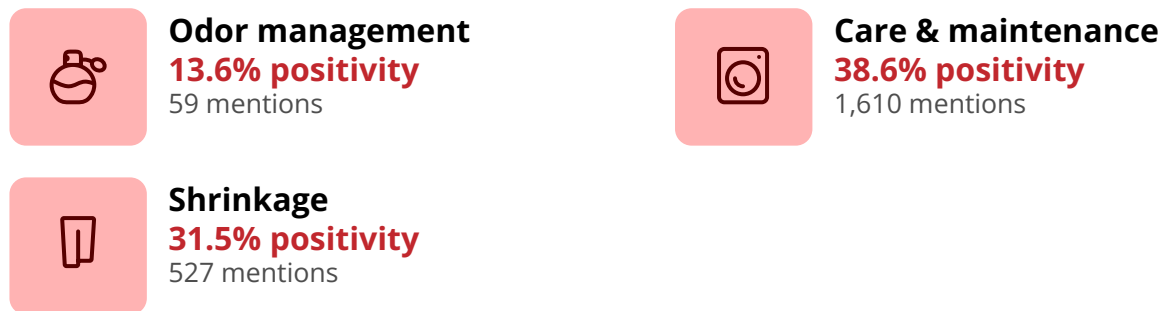
When QA comes up, it's almost never praise. It's a signal that customers think something slipped, changed, or wasn't checked.



That's not "confusion." That's "I feel tricked." In a polarized market, once a customer uses that frame, it spreads.



Add the after-purchase layer:



What this implies

Odor is no longer treated as "new denim smell." It's treated as a chemical signal - a moment where the buyer wonders what the product was exposed to, what dyes were used, whether it was previously worn, or whether it's even legitimate. That's why the sentiment is so extreme.

And the "solution layer" isn't saving it:

The "Anti-Odor" feature has a very low average sentiment (1.45), which is exactly what you'd expect when a promise is made but the experience contradicts it.

In 2026, the unboxing is brand media. If it smells wrong, looks wrong, or feels mishandled, the brand story collapses instantly.

Sustainability as a trust amplifier (not a marketing angle)

Sustainability shows up in a way many teams miss: not as a feel-good differentiator, but as a **credibility test**.

"Eco-Friendly Materials" is **strongly positive (80.6%)**, but at low volume (**31 mentions**). That's a signal of latent demand: buyers like it when it's real - but they don't talk about it unless it's tangible.

Now look at sustainability-linked features:

		Sentiment average
Climate-Conscious Production	4.0	★★★★☆
Recycled Fabric	3.23	★★★★☆
Water-Saving Production	2.0	★★★☆☆
Sustainable Dyes	1.0	★☆☆☆☆

What this implies

Customers reward sustainability when it feels like substance (materials, production). But they punish it when it feels like trade-offs or theater - especially if it correlates with the exact trust-breakers they already hate: odor, dye issues, shrinkage, fading, or “misleading” product truth.

So sustainability isn’t a separate “CSR story.” It’s now part of the brand’s honesty equation.

2.5

Implications across functions

Ecommerce

Brand trust now gets decided on the product page + unboxing. The practical mandate:

- Reduce “misleading” triggers (attributes, fit notes, stretch %, wash variance, labeling clarity)
- Treat odor/condition complaints as a **trust incident**, not a logistics footnote
- Design PDPs to prevent detective work

Merchandising

When authenticity anxiety rises, demand signals get distorted. Returns and complaints can look like product rejection when they’re actually **trust rejection**.

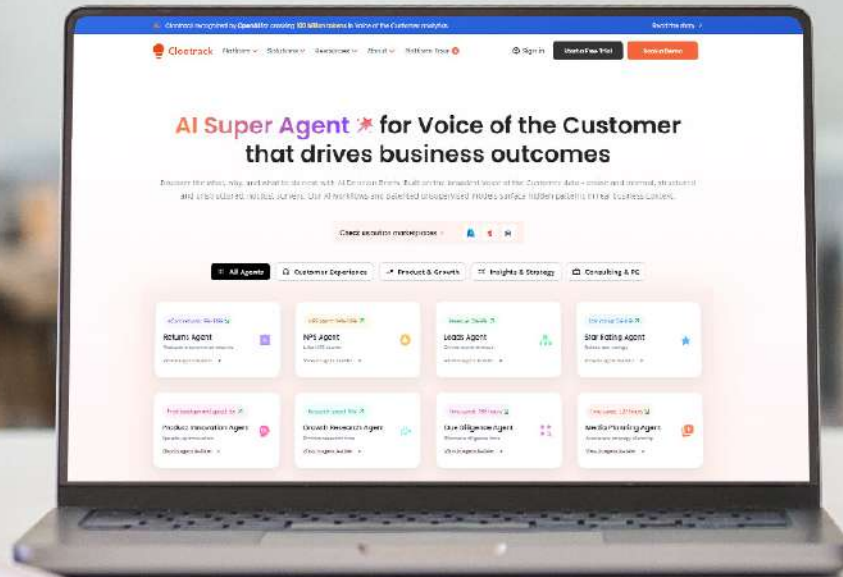
Separating those two prevents false conclusions like “the fit is bad” when the real issue is “the buyer doesn’t believe the listing.”

Marketing

Culture can be acquisition - **but only with readiness**. Marketing can’t outrun unboxing reality in 2026. If a moment drives trial, the next message shouldn’t be louder branding. It should be **credibility engineering**: proof, clarity, consistency cues, and reduced recovery friction.

CX

Support is increasingly handling trust tickets: authenticity doubts, odor complaints, “is this used?”, “is this real?”, “why is it different than last time?” Those aren’t “service issues.” They’re **brand integrity moments**.



You've seen the competitive reset happening across the US men's denim category.

Now, see the exact behavioral drivers behind your own brand's performance.

Track **Competitive Switching**

Identify the hidden friction points killing your repeat purchase intent

Prioritize **Operational ROI**



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