

INSIGHTS

HOME TEXTILES: SHEETS & BEDDING



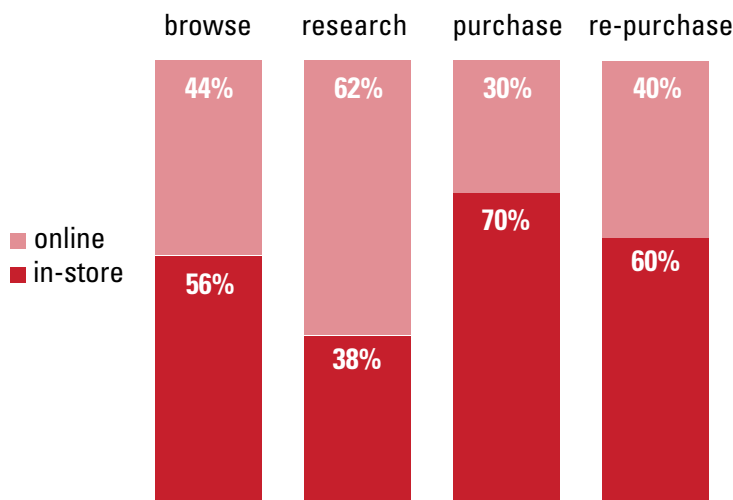
Top-of-bed products, which include sheets and bedding, account for the majority of U.S. home textiles imports on a fiber weight basis¹. With U.S. home textile spending projected to grow by one-fifth from \$54.5 billion in 2016 to \$66.5 billion in 2030², the top-of-bed market will likely grow at a similar rate. Although the top-of-bed market is still need-based, opportunities exist to encourage consumers to purchase new products through: improved digital assets that inspire consumers to research and browse online; cotton performance innovations that make cotton products more competitive with manmade fibers; and marketing messages that remind consumers why 100% cotton is their fiber of choice.

KEY INSIGHTS

- Leverage all consumer touchpoints to move consumers beyond replenishment and inspire them to purchase new products.
- Explain how top-of-bed products can address consumer interest in comfort, quality, and ease of care to help evolve purchases from need to want.
- Improve the competitiveness of cotton offerings by utilizing Cotton Incorporated abrasion resistance and moisture management technologies.
- Find inspiration for cotton-rich, top-of-bed offerings by browsing Cotton Incorporated's FABRICAST™ collections online.

TOP-OF-BED SHOPPING JOURNEY

% WHO PREFER THE FOLLOWING TAKE PLACE ONLINE OR IN-STORE...



OWNERSHIP & PURCHASE HABITS



SHEETS

5.5

average number of items owned & used regularly



BEDDING

4.8

1.6
average time (years) before consumers shop for new products



\$49

average price paid per product

\$98

TOP 5 REASONS TO PURCHASE NEW TOP-OF-BED PRODUCTS



	replacement	new color	desire	good sale	new style
sheets	69%	29%	26%	25%	21%
bedding	59%	28%	27%	23%	27%

HOME TEXTILES: SHEETS & BEDDING**SHOPPING HABITS & NEEDS**

Lack of brand loyalty in the top-of-bed market creates opportunities for both established brands and new entrants to develop products that truly meet consumers' primary needs. Most consumers are looking for sheets and bedding that are comfortable, good quality, easy to care for, and sold at a reasonable price. Explaining how products can meet these needs across all shopper touchpoints can help build brand loyalty and sales.

SOURCES OF TOP-OF-BED INSPIRATION**store displays****retailer websites****friends or family****TV****catalogs**

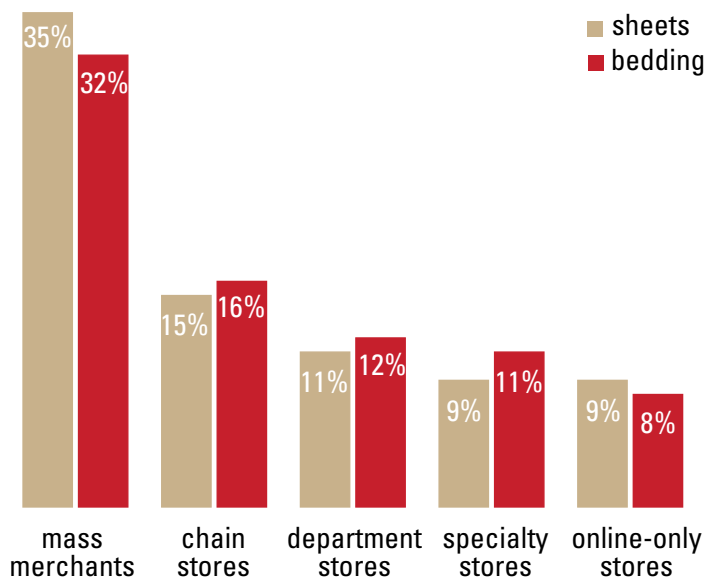
sheets **42%**
bedding **43%**

25%
25%

21%
21%

17%
19%

17%
17%

RETAIL CHANNELS SHOPPED MOST

3 in 4 consumers do not have a favorite brand of sheets or bedding.

PRIMARY PURCHASE DRIVERS**% SAYING THE FOLLOWING FACTORS ARE VERY IMPORTANT...**

	comfort	wash at home	quality	price	softness	durability	not hold odor
sheets	61%	n/a	55%	55%	52%	49%	49%
bedding	61%	57%	56%	55%	51%	49%	49%

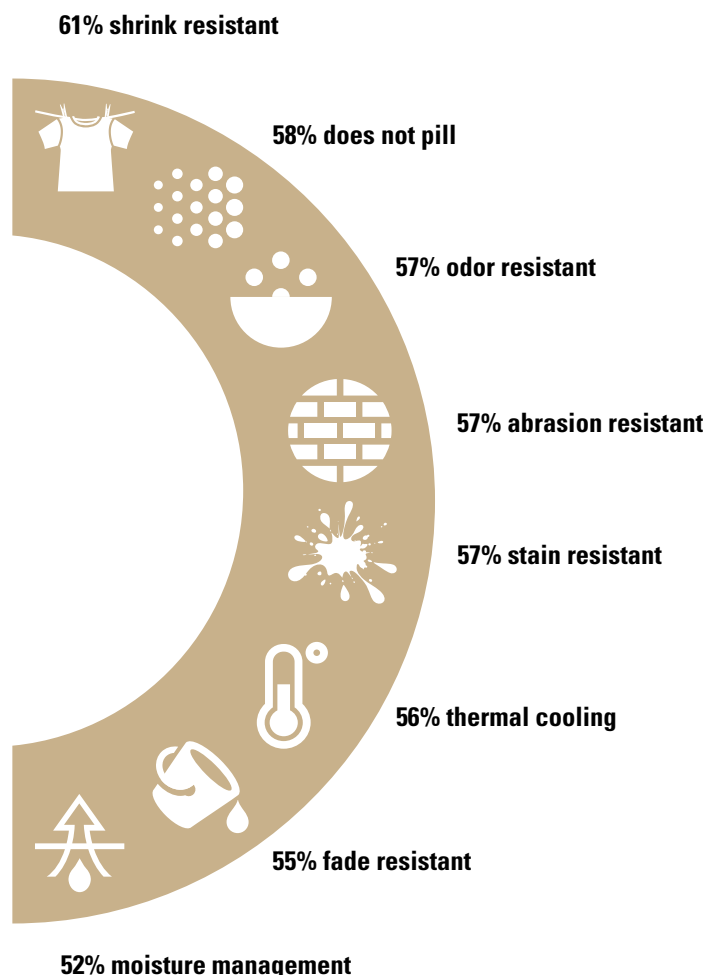
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PERFORMANCE ENHANCEMENTS

Although top-of-bed offerings with performance technologies remain limited at retail, they have more than tripled over the past four years. The majority of consumers say they are interested in top-of-bed products that help solve care issues common to apparel, such as shrinking, pilling, and stain resistance as well as products that offer typical active performance features such as odor control, abrasion resistance, thermal regulation, and moisture management. More than 3 in 5 consumers would choose cotton sheets and bedding products rather than products made from manmade fibers if the cotton products offered enhanced durability or moisture management functionality. Cotton Incorporated TOUGH COTTON™, TransDRY®, and WICKING WINDOWS™ technologies can help improve the competitiveness of cotton top-of-bed products.

PERFORMANCE TECHNOLOGIES OF MOST INTEREST TO CONSUMERS

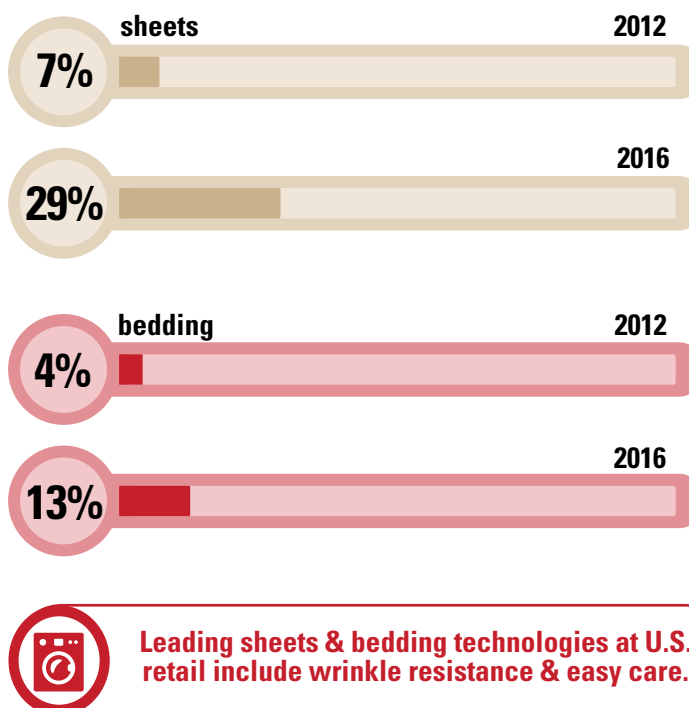
% VERY OR SOMEWHAT LIKELY TO LOOK FOR THE FOLLOWING PERFORMANCE FEATURES...
(WHEN SHOPPING FOR SHEETS & BEDDING)



Learn more about TOUGH COTTON™, TransDRY®, & WICKING WINDOWS™ technologies at www.CottonInc.com/product/Product-Technology

SHEETS & BEDDING MARKETING WITH PERFORMANCE TECHNOLOGIES

AT U.S. RETAIL STORES



INTEREST IN COTTON PERFORMANCE INNOVATIONS

% LIKELY TO PURCHASE COTTON SHEETS & BEDDING PRODUCTS THAT DID THE FOLLOWING...
(VS. THE SAME PRODUCTS MADE FROM MANMADE FIBERS)



70%
more durable



63%
wicked moisture

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COTTON OPPORTUNITIES

About 7 in 10 consumers say cotton is their fiber of choice for top-of-bed product categories because they feel cotton is best suited to meet their primary needs for comfort and quality as well as needs for reliability, sustainability, and an overall good nights' sleep. Beyond performance technologies, fabric construction as well as unique dyeing and finishing techniques can also make cotton sheets and bedding products more competitive with manmade fibers. The majority of consumers are interested in fabric concepts that use U.S. cotton, prints and patterns to mask wrinkles, and minimal processing. These concepts, along with many others can be utilized by the industry through Cotton Incorporated's FABRICAST™ collections.



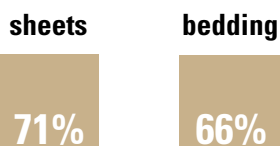
About 7 in 10 consumers prefer their sheets (74%) & bedding (69%) products to be cotton-rich.

INTEREST IN COTTON SHEETS & BEDDING

% LIKELY TO PURCHASE COTTON SHEETS & BEDDING PRODUCTS THAT ARE...
(COMPARED TO THOSE MADE FROM MANMADE FIBERS)



made in the USA
with U.S. cotton



able to utilize
prints & patterns
to naturally mask
wrinkles



unbleached
& minimally
processed

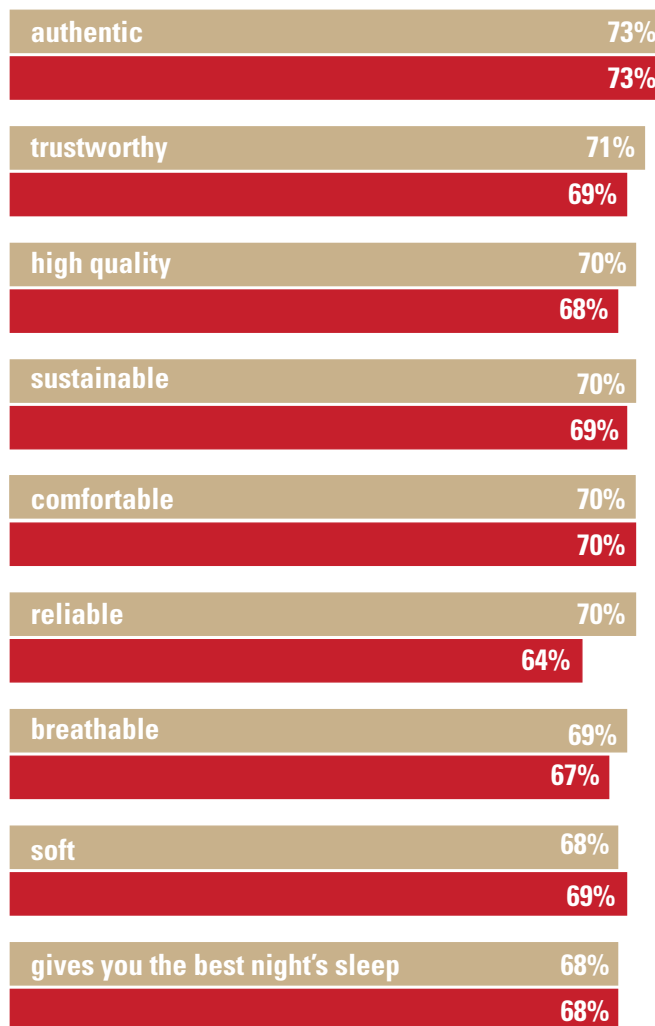


Find inspiration for your cotton sheets & bedding on Cotton Incorporated's FABRICAST™ webpage.

ATTRIBUTES CONSUMERS ASSOCIATE WITH 100% COTTON PRODUCTS

% SAYING 100% COTTON PRODUCTS ARE THE MOST...
(COMPARED TO COTTON BLENDS & 100% POLYESTER)

■ sheets ■ bedding



Sources: Cotton Incorporated 2017 Home Textiles Survey – survey of 2,000 men & women, ages 18-70 who purchase or have influence over the purchase of home textiles. Cotton Incorporated 2016 Home Textile Audit – in-store & online retail audit of bath towels, sheets, & bedding at key mass, chain, department, & specialty home textile retailers in the U.S. **External sources:** OTEXA & USDA¹, Euromonitor International² **Bedding:** comforters, quilts, blankets, & bedspreads.