

# INSIGHTS

## CHILDREN'S HOME TEXTILES



Children influence household spending in many markets, and the home textiles market is no exception. Cotton Incorporated's 2008 Home Fabrics Survey explored attitudes towards children's home textiles among women in U.S. households with children under 18. Of these women, 42% had recently purchased children's home fabrics, up significantly from 29% in 2006. Their responses show that the importance of soft, durable, easy-care cotton in children's home textile products continues to grow.

### DRIVEN MORE BY "WANT" THAN "NEED"

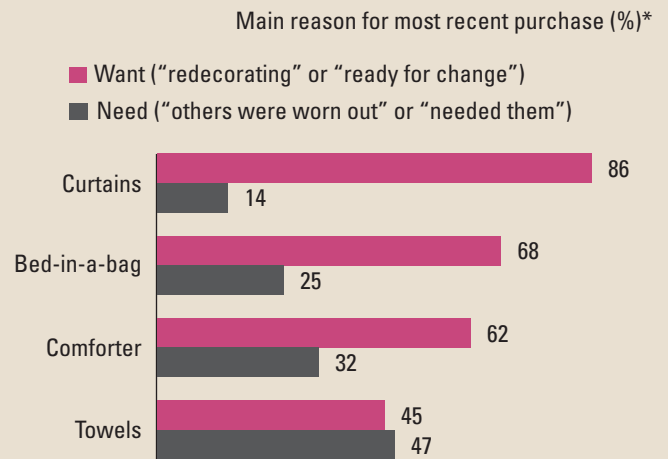
Purchases of children's curtains and bedding (comforters or beds-in-a-bag) are driven mainly by redecorating and the desire for a change, rather than by need—a pattern that has not changed since 2006. In contrast, products subject to more wear and tear and more frequent laundering, such as towels, are more likely to be bought as replacements for worn-out items. However, even when motivated by "want," rather than "need," women still are price-conscious shoppers, as 76% bought these products mainly at mass merchants (compared with 42% for all household home textiles). The next-most-popular retail channels were chain stores (32%), specialty stores (27%), and department stores (24%).

### LETTING CHILDREN HELP CHOOSE

Although few women let children make their own decisions about home-textile purchases (ranging from 5% to 12%, depending on the product), they often let the child share in purchase decisions. Women were most likely to get kids' input on purchases of beds-in-a-bag (60%) and comforters (56%), but the majority did not consult the child when selecting towels (53%), curtains (51%), or other children's home textiles

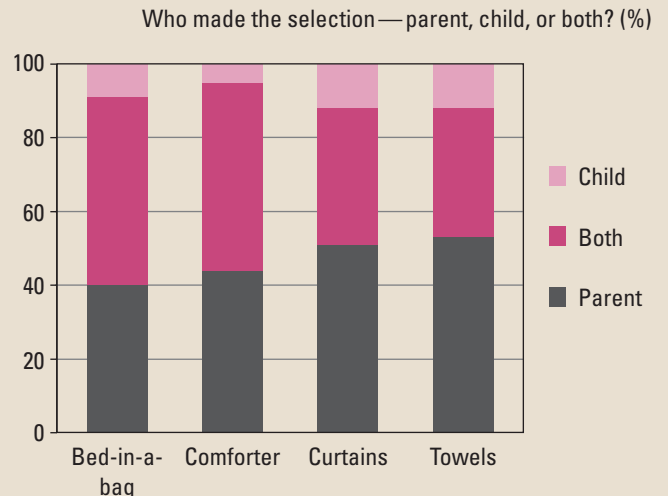
(59%). Nonetheless, children's influence probably accounts for a significant jump in the percentage of consumers who bought home-textile products with licensed characters (from 46% in 2006 to 60% in 2008). Products featuring characters were most popular with younger children: 72% of shoppers

### PURCHASES ARE DRIVEN BY "WANT"



\*Responses do not include "other" reasons and do not necessarily total 100%.  
Cotton Incorporated's 2008 Home Fabrics Survey

### CHILDREN HELP CHOOSE HOME TEXTILES



Cotton Incorporated's 2008 Home Fabrics Survey

#### About the Survey

Cotton Incorporated's latest Home Fabrics Survey, completed in 2008, was conducted by the Praxi Group (Kittredge, CO) in a nationwide sample of women aged 25 to 70. The 800 women who completed the on-line survey were the primary purchasers of home fabric for their households, and represented a mixture of ethnicities, geographic locations, and levels of income and education. Of these 800 women, 403 were in households with children under the age of 18.



## CHILDREN'S HOME TEXTILES

bought them for children under 10, compared with 52% for children aged 10 to 18. With both moms and kids participating in the selection process, manufacturers and retailers face the challenge of developing and marketing products that appeal to two groups with potentially different priorities when it comes to home textiles.

### PAYING MORE FOR SHEETS

Although women favor less-expensive retail channels for children's home textiles, they reported spending more on children's sheets in 2008 (\$28) than in 2006 (\$23). Most (56%) said they spent the same amount on children's sheets as on sheets for their own beds, but the percentage who said they spent more on children's sheets was up significantly (from 3% to 9%), and the percentage who said they spent less was down significantly (from 44% to 35%). As with sheets for the rest of the household, shoppers overwhelmingly preferred to purchase children's sheets in packaged sets, rather than as single sheets (90% for children's sheets and 93% for total household sheets).

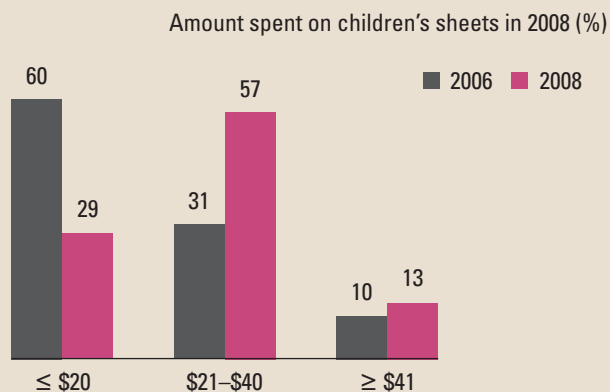


“very important” in children's sheets increased significantly, from 43% to 63%. Other features “very important” to most women shopping for sheets included size, price, color, softness, and life of product, while brand name came in last.

### COTTON — STANDING UP TO WEAR AND TEAR

Most women feel that 100% cotton stands up well to children's wear and tear — 98% rate the fiber as “very” or “some-what” durable in children's home textiles. When women shop for children's bedding, over two-thirds “usually” or “always” look for cotton. To enhance the natural properties that make cotton so appealing in home textiles, Cotton Incorporated has developed two performance cotton finishes, *repel™* and *endure™*. The *repel™* finish provides stain resistance and wicks moisture away from the body, and the *endure™* finish increases durability while reducing shrinkage and improving color retention and wrinkle resistance. In all types of children's home textiles, cotton provides the durability, comfort, and ease of care that consumers want.

### WOMEN ARE SPENDING MORE ON SHEETS

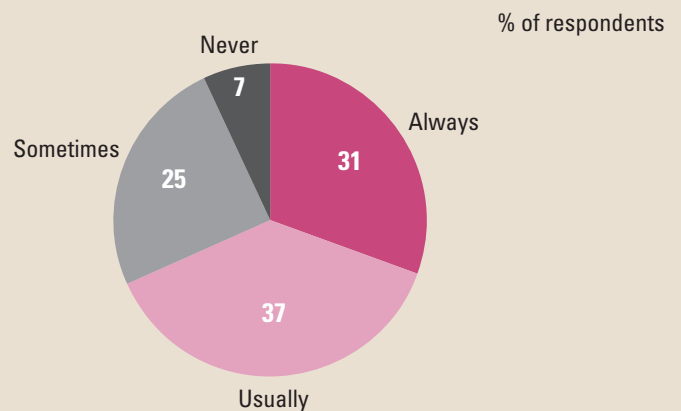


Cotton Incorporated's 2008 Home Fabrics Survey

What features induce shoppers to pay more for children's sheets? Consumers are most willing to pay a premium for stain resistance (76%) and durability (75%). These same two characteristics topped the list of desired features in sheets (85% for durability and 84% for stain resistance). Yet despite the importance of stain resistance to consumers, a recent retail audit conducted by Cotton Incorporated found that no sheets were marketed as stain resistant. The Home Fabrics Survey data suggest an unmet demand for functional features in sheeting.

From 2006 to 2008, the percentage of women willing to pay a premium for 100% cotton children's sheets rose from 53% to 62%, and the percentage who rated 100% cotton as

### WOMEN LOOK FOR COTTON BEDDING



Cotton Incorporated's 2008 Home Fabrics Survey

