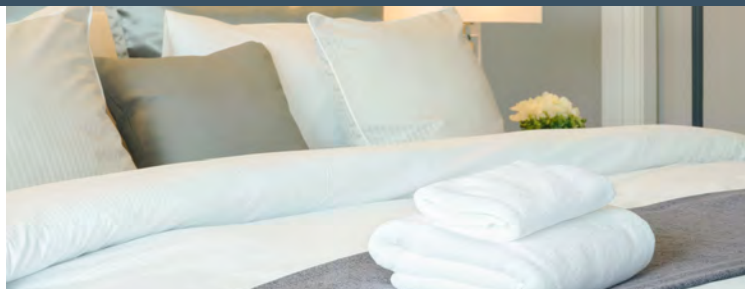


U.S. consumers spent \$66.4 billion on home textile products in 2019. While a drop in spending due to the COVID-19 pandemic is expected in 2020, this market is projected to recover by 2022 and to show a 5 year growth of 8.3% with \$72 billion spent in 2024¹. Consumers seek comfort in soft, fluffy towels, sheets, bedding, and blankets; important qualities during this global crisis, as 79% of U.S. consumers say they "just want to curl up in a cozy bed."²



■ Average # of Products Owned ■ Average \$ Spent

KEY INSIGHTS

86%
BELIEVE QUALITY SHEETS AND BEDDING HELP YOU SLEEP BETTER.

Quality is a key purchase driver.

73%
SAY 100% COTTON IS IMPORTANT FOR HOME TEXTILES.

Consumers see the role fiber plays in softness, quality, function, and comfort.

61%
LOOK TO DIGITAL SOURCES FOR INSPIRATION.

Lean into digital as consumers look to make their home a comfortable refuge.

PURCHASE DRIVERS

Sheets & Bedding

- Comfort 90%
- Quality 86%
- Durability 83%
- Softness 83%
- Price 80%

Towels

- Quality 86%
- Durability 85%
- Softness 84%
- Price 80%
- Absorbency 77%

58% say it is important to know fiber content of home textile products because it tells them:

Sheets & Bedding

- Softness 44%
- Quality 42%
- Temp Control 38%
- Comfort 37%
- Sweat Control 29%

Towels

- Softness 41%
- Quality 39%
- Absorbency 33%
- Washes Clean 32%
- Comfort 29%



say 100% cotton is important to them when shopping for home textiles

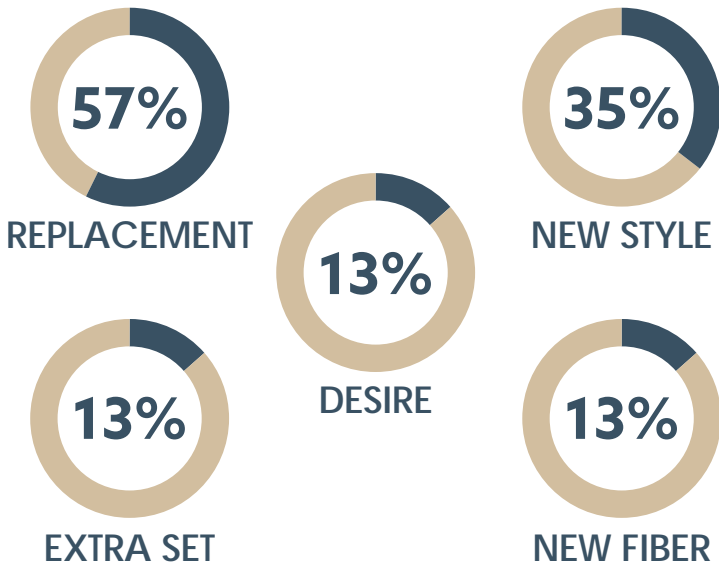
78% consumers willing to pay more for quality.



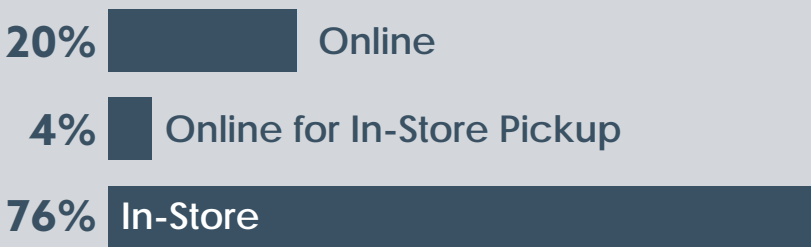
MARKET OPPORTUNITIES

Physical stores play a strong role in consumers' home textile shopping journey, from store displays for inspiration to in-store purchasing. In the COVID-19 era, brands and retailers can ramp up their online efforts with solutions such as quality and money-back guarantees that allow consumers to try new products risk free.

TOP 5 REASONS TO PURCHASE NEW HOME TEXTILES



METHOD OF LAST PURCHASE MADE



WHERE PURCHASES WERE MADE

Sheets & Bedding

- Mass Merchant 46%
- Department Store 22%
- Online Only 12%
- Home Specialty 11%

Towels

- Mass Merchant 60%
- Department Store 22%
- Online Only 5%
- Home Specialty 7%



SOURCES OF INSPIRATION



SOCIAL MEDIA SOURCES OF INSPIRATION

(among those who get home textile ideas from social media, N=141)

