



Flooring (NZ)

Category behaviour

38%

of consumers have purchased carpets/rugs in the last 3 years

55%

of these shoppers bought carpets/rugs made purely or partly from sheep wool (41% of non-purchasers considered wool during the purchase journey)

70%

will buy woollen carpets/rugs again in future

Drivers and barriers to purchase

Why do people buy woollen carpets/rugs?

- > Warmth
- > Nice feel
- > Durable/long lasting

Why don't people buy woollen carpets/rugs?

- > Too expensive (reported by 6 out of 10 non-purchasers)
- > Not easy to clean/maintain
- > Not stain resistant

How can wool better compete with other fibres in the flooring category?

- > Synthetics lead on being affordable, yet consumers consider them to be less durable – so their value for money can be challenged
- > Improve education about ease of care and cleaning
- > Reinforce or create more messaging about acoustic qualities of woollen carpets, as this is already a recognised advantage that wool has over synthetics and plant fibres.

How to change behaviour

Reinforce the known benefits

- > Durable
- > Warm
- > High quality
- > Sound absorption

Better address the barriers

- > Focus consumer online reviews on ease of cleaning (myth bust)
- > Consider pricing strategy and/or provide assurances around longevity i.e. greater lifetime value

Understand our buyers better

- > More likely to be male
- > Average age is 47 years old
- > Higher preference for buying woollen products
- > More likely to be conducting a renovation or building process (or planning one)

Play to competitive advantages where it matters most to consumers

- > Category leading warmth and sound absorption
- > Category leading durability but while still retaining a soft feel



Building Insulation (NZ)

Category behaviour

11%

of consumers have purchased building insulation in the last 3 years

37%

of these shoppers bought insulation made purely or partly from sheep wool (33% of non-purchasers considered wool during the purchase journey)

73%

will buy woollen building insulation again in future

Drivers and barriers to purchase

Why do people buy woollen building insulation?

- > Warmth
- > Wanted superior quality
- > Durable/long lasting

Why don't people buy woollen building insulation?

- > Wool option wasn't available
- > Too expensive
- > Salesperson recommended something else instead

How can wool better compete with other fibres in the building insulation category?

- > Warmth is a key driver for this category and consumers rate strong wool far higher than other fibres
- > Strong wool is also more widely recognised as being natural, high quality and able to absorb sound when compared with synthetic alternatives.

How to change behaviour

Reinforce the known benefits

- > Durable
- > High quality
- > Warm
- > Absorbs sound

Better address the barriers

- > Improve ranging/ensure wool insulation is presented as an option
- > Promote users to share their reviews of woollen insulation online – a channel where usage is growing and it removes any retailer salesperson bias

Play to competitive advantages where it matters most to consumers

- > Category leading durability vs price premium when compared with synthetics – especially given its use in lifetime assets.
- > Potential to raise awareness of wool's fire-resistant properties.



Bedding (NZ)

Category behaviour

61%

of consumers have purchased bedding e.g. pillows, comforters, mattresses, blankets in the last 3 years

46%

of these shoppers bought bedding made purely or partly from sheep wool (29% of non-purchasers considered wool during the purchase journey)

67%

will buy woollen bedding again in future

Drivers and barriers to purchase

Why do people buy woollen bedding?

- > Warmth (reported by 8 out of 10 purchasers)
- > Wanted superior quality
- > Nice feel

Why don't people buy woollen bedding?

- > Too expensive
- > Wool option wasn't available
- > Not easy to clean/maintain

How can wool better compete with other fibres in the bedding category?

- > Reinforce strong wool's recognised reputation for being durable, warm and natural
- > Challenge the consumer perception that plant fibres are more biodegradable than strong wool.

How to change behaviour

Reinforce the known benefits

- > Warm > Superior quality > Nice feel

Better address the barriers

- > Improve ranging/availability
- > Create linkages between strong wool and fine wool, where positive associations already exist eg warm, soft, luxurious and stronger. They are both sourced from sheep fleece.
- > Focus consumer online reviews on ease of cleaning (myth bust)

Understand our buyers better

- > Half of all purchasers are 25-44 years old
- > Enjoy time outdoors and in nature, or with pets
- > Higher preference for woollen products
- > More likely to seek out sheep wool product info via consumer reviews online

Play to competitive advantages where it matters most to consumers

- > Category leading durability but while still retaining a soft feel
- > Similar benefits to fine wool but at a more accessible price point



Soft Furnishings (NZ)

Category behaviour

37%

of consumers have purchased soft furnishings e.g. curtains/drapes, throws, fabric, cushions, upholstery (couches) in the last 3 years

31%

of these shoppers bought soft furnishings made purely or partly from sheep wool (29% of non-purchasers considered wool during the purchase journey)

66%

will buy woollen soft furnishings again in future

Drivers and barriers to purchase

Why do people buy woollen soft furnishings?

- > Nice feel
- > Warmth
- > Durable/long lasting

Why don't people buy woollen soft furnishings?

- > Too expensive
- > Wool option wasn't available
- > Not easy to clean/maintain

How can wool better compete with other fibres in the soft furnishings category?

- > Reinforce strong wool's recognised reputation for being durable, natural and absorbing sound
- > Affordability is a challenge and especially since it is not perceived as being as luxurious or soft as fine wool
- > Natural and biodegradable are areas where strong wool could better differentiate itself from plant fibres

How to change behaviour

Reinforce the known benefits

- > Durable
- > Soft feel
- > Warm

Better address the barriers

- > Align more closely with fine sheep wool – which is perceived as having superior softness
- > Adjust pricing

Understand our buyers better

- > Skew to higher household income
- > More likely to own their home
- > Higher preference for woollen products ie 2 out of 3 have purchased woollen carpets/rugs in last 3 years

Play to competitive advantages where it matters most to consumers

- > Category leading warmth and durability
- > Soft touch feel that comes from sheep fleece like fine wool