



# Flooring (USA)

## Category behaviour

**42%**

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

**43%**

of these shoppers bought carpets/rugs made purely or partly from sheep wool (31% of non-purchasers considered wool during the purchase journey)

**73%**

will buy woollen carpets/rugs again in future

## Drivers and barriers to purchase

### Why do people buy woollen carpets/rugs?

- > Durability
- > Visually appealing
- > Feels good to the touch (soft)

### Why don't people buy woollen carpets/rugs?

- > Too expensive
- > Wool option is not available
- > Not easy to clean/maintain

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

- > Reinforce strong wool's recognised reputation for being durable, high quality, warm and effective at absorbing sound.
- > Synthetics lead on being affordable, yet consumers consider them to be less durable – so their value for money can be challenged.
- > Plant fibres are considered more biodegradable, natural and ethical than strong wool but this is a perceptual gap that can be addressed through education.

## How to change behaviour

### Reinforce the known benefits

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

### Better address the barriers

- > Improve ranging /ensure wool is on shelf
- > 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 40yrs (average)
- > Have children living at home
- > Higher preference for woollen products
- > Most likely to use social media for information and advice when home finishing

### 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 (USA)

## Category behaviour

**8%**

of consumers have purchased building insulation in the last 3 years

**30%**

30% of these shoppers bought insulation made purely or partly from sheep wool (36% of non-purchasers considered wool during the purchase journey)

**88%**

will buy woollen building insulation again in future

## Drivers and barriers to purchase

### Why do people buy woollen building insulation?

- > Durable/long lasting
- > Warmth
- > Superior quality
- > Environmentally friendly
- > Sound absorption

### Why don't people buy woollen building insulation?

- > Too expensive
- > Wool option is not available or offered to them

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

- > Synthetics lead on being affordable, yet consumers consider them to be inferior to strong wool insulation when it comes to quality, warmth and absorbing sound
- > Strong wool excels on being more sustainable (ie biodegrades) and ethical for the more environmentally conscious shopper

## 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
- > Focus on the product longevity and superior performance during price comparisons with synthetic insulation

### Play to competitive advantages where it matters most to consumers

- > Category leading durability vs price premium – especially given its use in lifetime assets. Potential to raise awareness of wool's fire-resistant properties.
- > Category leading warmth, quality and sound absorption



# Bedding (USA)

## Category behaviour

**61%**

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

**31%**

of these shoppers bought bedding made purely or partly from sheep wool (23% of non-purchasers considered wool during the purchase journey)

**76%**

will buy woollen bedding again in future

## Drivers and barriers to purchase

### Why do people buy woollen bedding?

- > Warmth
- > Felt good to the touch
- > Durable/long lasting

### Why don't people buy woollen bedding?

- > Don't typically buy wool
- > Not easy to clean/maintain
- > Felt too rough to the touch

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

- > Reinforce strong wool's recognised reputation for being durable, high quality, warm and natural
- > Strong wool's biggest competing fibre is soft wool – it is seen as being of superior softness, quality, more natural and warmth

## How to change behaviour

### Reinforce the known benefits

- > Warm
- > Durable
- > Nice feel

### Better address the barriers

- > 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

- > More likely to be male and aged 25–44 years old
- > Have children living at home
- > Live in an urban area
- > Higher preference for woollen products
- > More likely to seek out sheep wool product info on social media or the TV

### 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 (USA)

## Category behaviour

**35%**

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

**33%**

of these shoppers bought soft furnishings made purely or partly from sheep wool (26% of non-purchasers considered wool during the purchase journey)

**78%**

will buy woollen soft furnishings again in future

## Drivers and barriers to purchase

### Why do people buy woollen soft furnishings?

- > Durability
- > Warmth
- > Feels good to the touch (soft)

### Why don't people buy woollen soft furnishings?

- > Don't typically buy wool
- > Felt too rough to the touch
- > 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, high quality, warm and natural
- > Affordability is a challenge and especially since it is not perceived as being as luxurious as other fibres
- > Strong wool's biggest competing fibre is soft wool – it is seen as being of superior softness, quality, more natural and warmth

## How to change behaviour

### Reinforce the known benefits

- > Durable
- > High quality
- > Warm

### Better address the barriers

- > Align more closely with fine sheep wool – which is perceived as having superior softness
- > Focus consumer online reviews on ease of cleaning (myth bust)
- > Adjust pricing

### Understand our buyers better

- > More likely to be male and aged 25-44 years old
- > Have children living at home
- > Live in an urban area
- > Higher preference for woollen products
- > More likely to seek out sheep wool product info on social media, internet videos or the TV

### 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