

Mattress Shopper's Buyer Journey

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Background and Objectives

- The goal of ISPA's buyer journey research is to better inform the industry of the journey that people follow when considering and purchasing a new mattress to maximize the value exchange.
- Research will further assist members in understanding *how, what, where, when, and why* to communicate with the consumer, and serve as an additional research source for its members.
- To achieve these desired outcomes, the current research objectives are to:
 - Understand the **context for sleep and bedding products**, including sleep health and need states, and attitudes toward the mattress/sleep industry and mattress buying experience.
 - Determine **buying journey stages**.
 - Identify purchase **decision triggers**, motivations, and considerations.
 - Understand shopping behaviors and needs, whereby determining:
 - **Channels/touchpoints**
 - **Content/information**
 - **Emotions and frustrations**
 - Capture **reflections on the purchase decision**, including how consumers feel about their current mattress and the process they followed, what they'd do differently and why.

Methods

- The survey was conducted online in November 2019.
- A total of 2,501 US adults who purchased a mattress within the past four years participated in the survey, including 1,501 who purchased a mattress during the past year.
 - Overall, 21% of US adults 18+ purchased a mattress within the past year.
- Participants met the following qualifications:
 - US resident, 18+ years of age
 - Purchased a mattress for themselves or for someone else in their household within the past four years
 - Participate in the research, selection, and final mattress purchase, with sole or shared involvement and responsibility
 - Not employed by a furniture, mattress, or bedding accessory manufacturer or major retailer, or in advertising, PR or market research

Note: In this report, Generation labels refer to the following age groups:

- Millennials: 18-39 years old
- GenX: 40-54 years old
- Boomers: 55+ years old

Key Findings

- **At the start of their journey, most recent purchasers do not feel highly knowledgeable about new mattress prices, brands, types or technology.**
 - Recent purchasers begin their journey not highly certain about which mattress brands or features they will purchase or from which retailers they will make their purchase.
- **Most journeys are prompted by issues with the prior mattress.**
 - Recent purchasers begin their journey with feelings of optimism, joy and anticipation.
- **The majority of buyers include others in their purchase journey.**
- **Recent purchasers utilize a range of information channels when exploring new mattresses, typically beginning their process with either a web search or looking at in-store displays.**
 - **Most frequent types of information sought are about price,** mattress size and type. Typically, serious consideration is given to two different mattresses before purchase.

Key Findings

- **The digital divide between generations is notable in the information channels used during the evaluation phase; Boomers rely overwhelmingly on in-store displays and store.**
 - While the predominant emotions among Millennials during the evaluation phase are optimism and anticipation, nearly as many feel overwhelmed.
- **The majority of recent purchasers enjoyed shopping for their new mattress and are satisfied with their researching and shopping experience.**
- **More than half are very satisfied with their recently purchased mattress.**
 - The shopping experience matters – purchasers' satisfaction with their shopping experience has a significant impact on their satisfaction with their mattress.

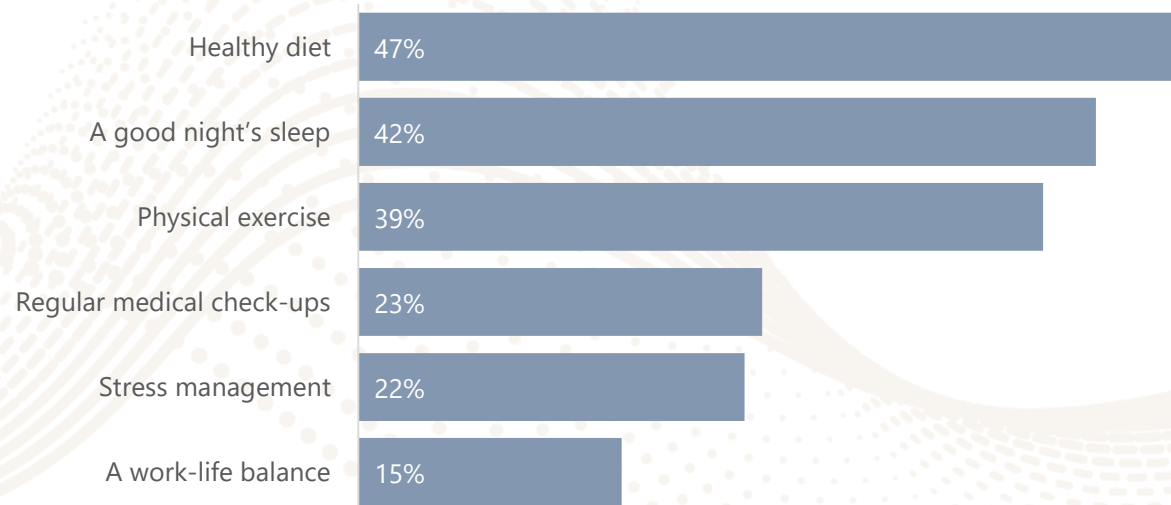
DETAILED FINDINGS

Recent Purchasers' Views on Sleep and Mattresses

THOSE WHO PURCHASED A MATTRESS WITHIN THE PAST YEAR

For recent purchasers, a good night's sleep is among their most important factors for wellbeing; Millennial purchasers rate it as their top factor

Which of the following factors do you believe are the most important for your health and wellbeing? Please select up to two responses.



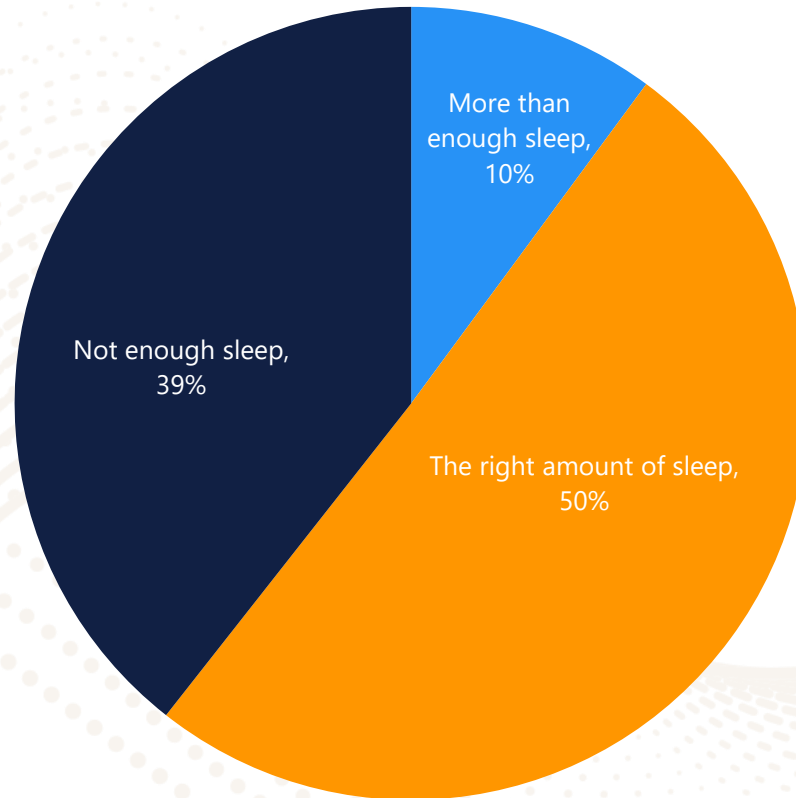
QA1 Base: Recent Purchasers (N=1501)

Top Factors for Health and Wellbeing by Generation

Millennials	GenX	Boomers
A good night's sleep (43%)	Healthy diet (46%)	Healthy diet (58%)
Healthy diet (40%)	A good night's sleep (44%)	Physical exercise (42%)
Physical exercise (37%)	Physical exercise (39%)	A good night's sleep (39%)

However, many feel they do not get enough sleep

In general, do you feel that you get:

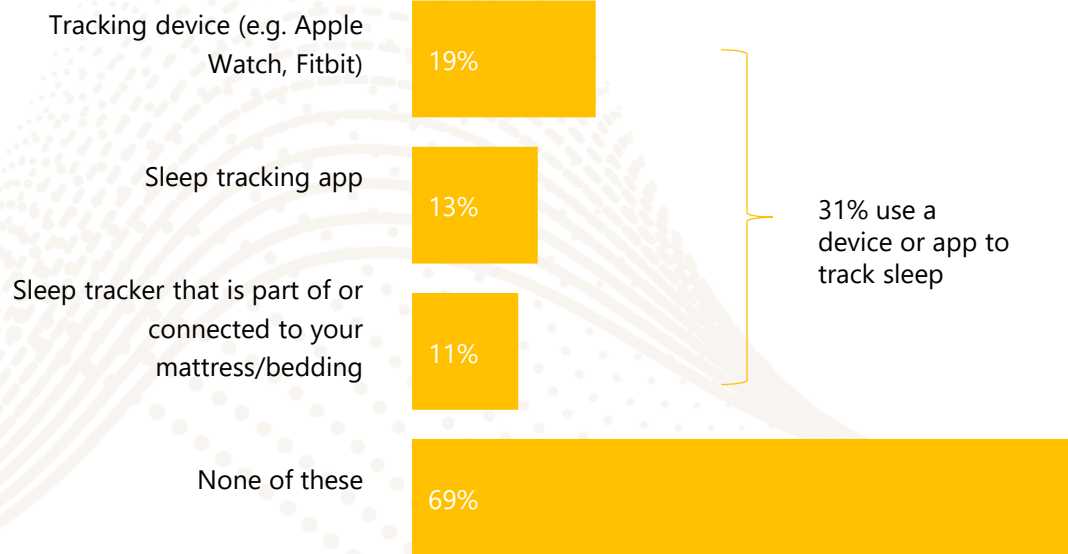


GenXers are the most likely to report a sleep deficit.
45% feel they do not get enough sleep (vs. 39% of Millennials and 34% of Boomers)

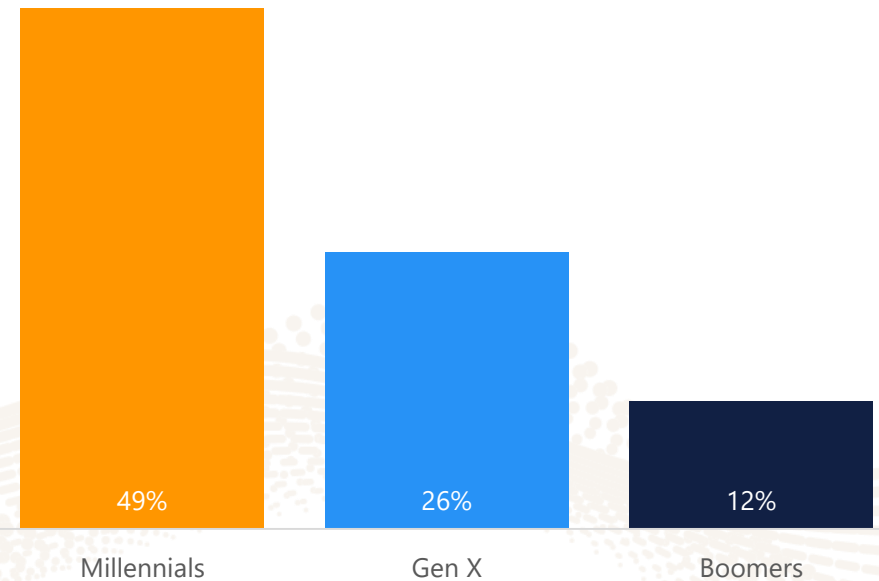
QA3 Base: Recent Purchasers (N=1501)

Half of Millennials, who purchased a mattress within last year, use a device or app to track their sleep; adoption rates are lower for older recent purchasers

Do you use any of the following to track your sleep?



Uses device/ app to track sleep

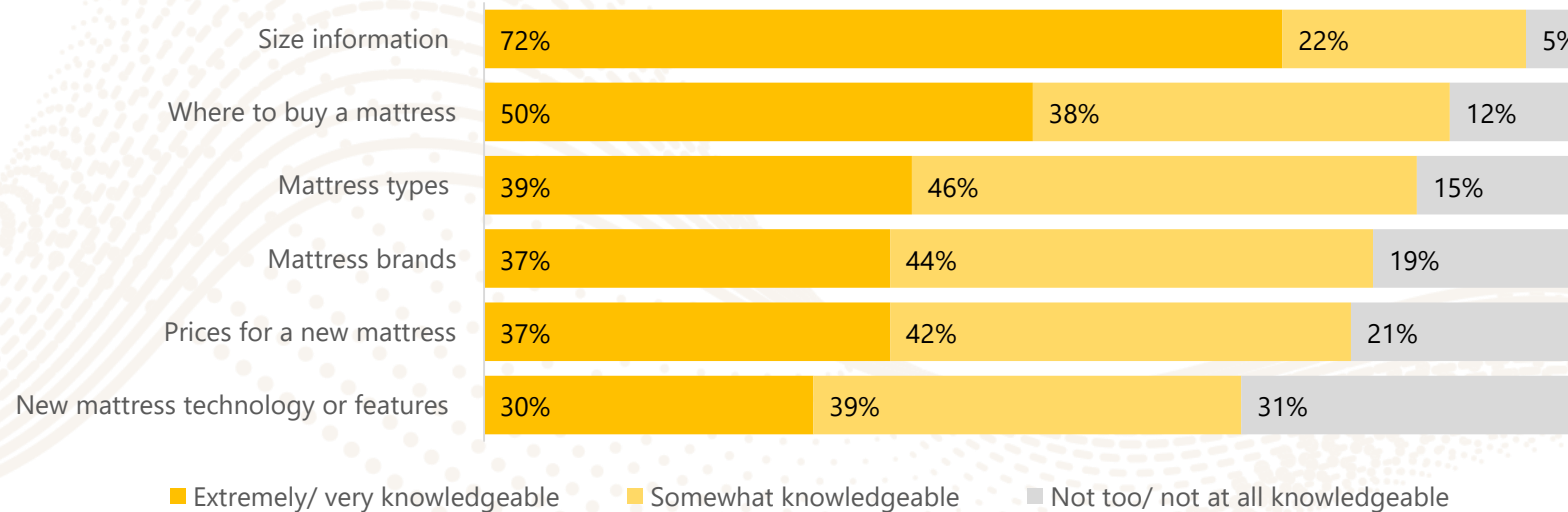


QA5 Base: Recent Purchasers (N=1501)

Before embarking on their shopping journey, recent purchasers feel most knowledgeable about mattress size and where to make a purchase

One in five do **not** feel knowledgeable about the cost of mattresses at the start of their purchase journey

Before you started shopping or looking for a new mattress, how knowledgeable did you feel about each of the following?



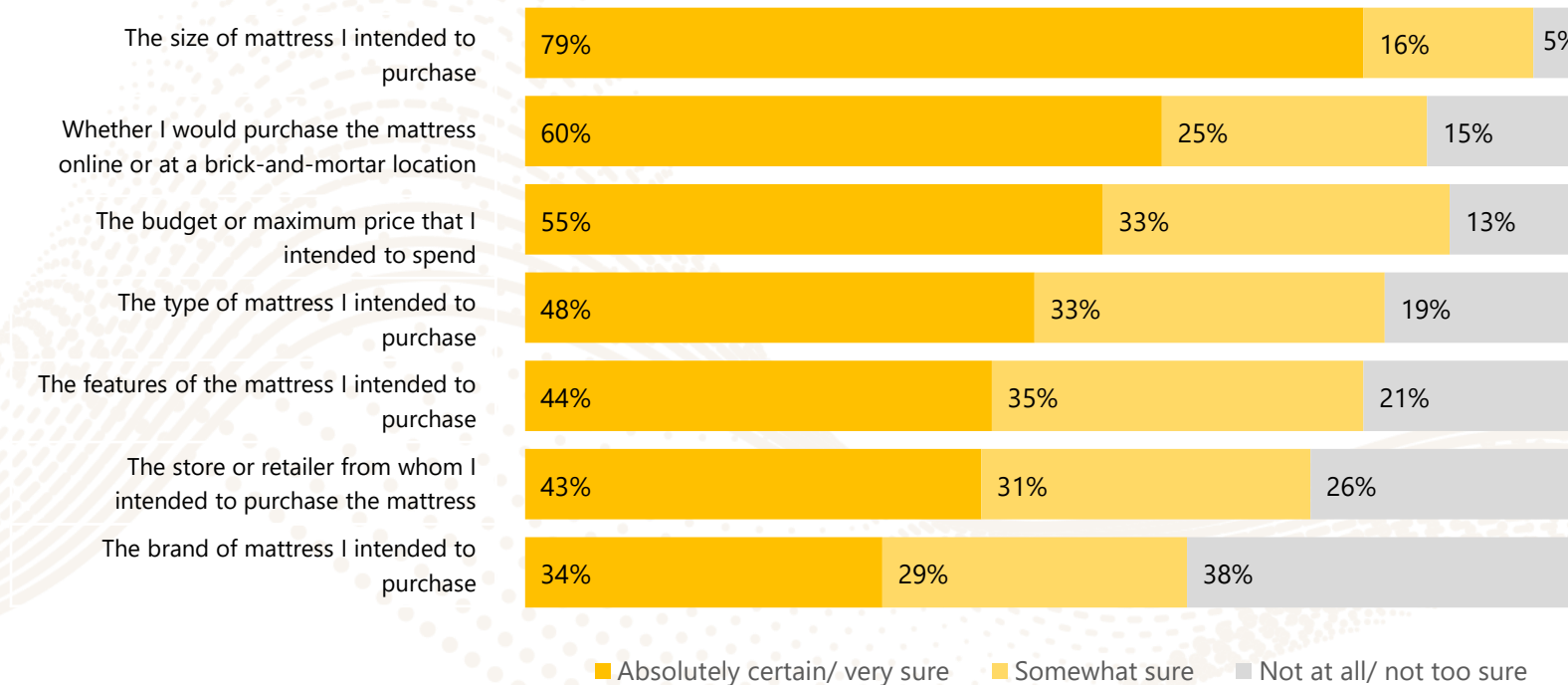
Millennials were more likely than Boomers to feel highly knowledgeable about the following mattress information at the start of their journey:

- Price (46% vs. 27%);
- Types (45% vs. 30%);
- Brands (44% vs. 27%); and
- New tech/ features (40% vs. 19%).

QB9 Base: Recent Purchasers (N=1501)

While most begin their journey highly certain about the mattress size they would purchase or whether they would purchase online, the majority are less sure about brand, retailer or features

Before you started shopping or looking for this mattress, how sure did you feel about each of the following for the mattress you intended to purchase?



Millennials were more likely than Boomers to feel highly certain about the following at the start of their journey:

- Budget (59% vs. 48%);
- Type (50% vs. 44%); and
- Brand (42% vs. 25%).

QC4 Base: Recent Purchasers (N=1501)



DETAILED FINDINGS

Snapshot of Mattress Purchased

The mattress that recent buyers purchased was most often a replacement mattress for their personal use

78%

Purchased the mattress that they sleep on

- 12% of Millennials purchased for a child (vs. 3% of Boomers).

86%

Purchased as a replacement for another mattress. Among those who purchased as a replacement:

- 63% replaced a mattress that was in good or not so bad condition.
- 70% replaced a mattress that was 10 years old or less.
- Millennials are more likely to have replaced a mattress that was less than 5 years old (44% vs. 11% of Boomers).

59%

Have purchased 2+ mattresses in the past 10 years.

- Millennials are more likely to have purchased 2+ mattresses (67% vs. 45% of Boomers).

49%

Expect to keep their recent mattress purchase less than 10 years.

- 22% don't know how long they'll keep this mattress.
- Boomers are more likely than Millennials to expect to keep their mattress 10 years or more (47% vs. 15%).

QB1, B2, B3, B4, F1, F2 Base: Recent Purchasers (N=1501)

Type of mattress recent buyers purchased:

49%

Purchased a Queen size mattress

- 28% purchased a King or California King, 13% purchased a Full and 9% purchased a Twin mattress.
- Millennials are more likely than Boomers to purchase a King or California King (33% vs. 21%).

34%

Purchased a foam mattress without springs or coils (such as latex, memory or gel). Other types of mattress purchased include:

- Spring mattress (30%)
- Hybrid mattress made from both springs and foam (22%)
- 10% purchased other types (e.g., adjustable air chamber, sleeper/sofa, futon) and 4% were not sure.
- Millennials are more likely than Boomers to purchase a foam mattress made without springs or coils mattress (36% vs. 28%).

44%

Purchased a pillow top mattress.

- Millennials are more likely than Boomers to purchase a pillow top (52% vs. 37%).

58%

Use a flat boxspring/foundation under their mattress. Other types of foundations used include:

- Adjustable foundation (19%)
- Futon frame (5%) and sleeper/sofa (4%).
- 65% purchased a new foundation at the same time they purchased their mattress.

60%

Spent less than \$1000 on their mattress or mattress/foundation purchase.

- Millennials are more likely than Boomers to have spent less than \$1000 on their purchase (66% vs. 53%).

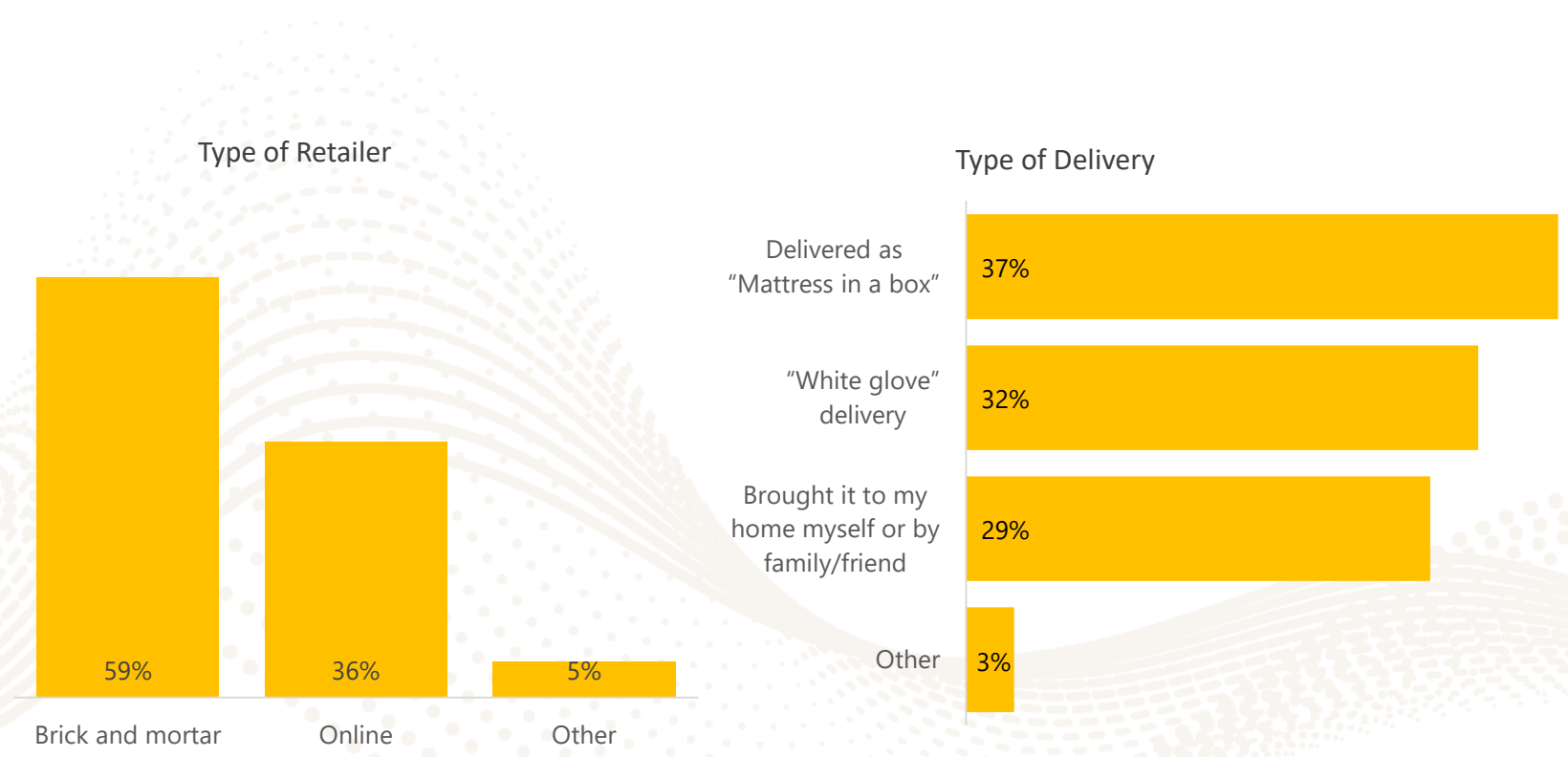
64%

Purchased accessories (e.g., sheets, mattress pad) at the time of mattress purchase.

- Millennials are more likely than Boomers to purchase accessories at the time of mattress purchase (74% vs. 54%).

QB5, B6a, B6b, B7, B8, E5, E10 Base: Recent Purchasers (N=1501)

While the majority of recent buyers (59%) purchased their mattress from a brick-and-mortar location, more than four in ten Millennials made their purchase online



- Millennials are more likely than Boomers to purchase online (43% vs. 26%). Millennials are most likely to have "mattress in a box" delivery (40%) or to have brought it to their home themselves (37%).
- Boomers are more likely than Millennials to purchase at a brick & mortar location (70% vs. 50%). Boomers are most likely to have "white glove" delivery (45%) or "mattress in a box" (33%).

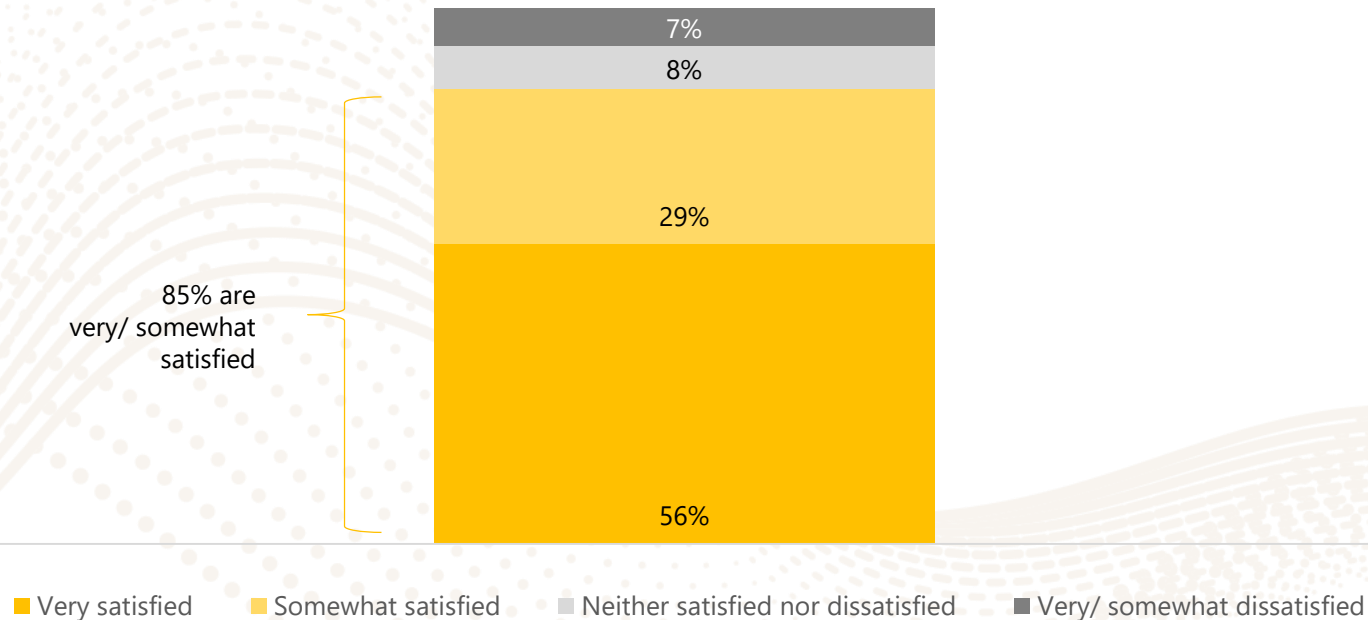
QE2 and QE4 Base: Recent Purchasers (N=1501)

DETAILED FINDINGS

Mattress Satisfaction and the Shopping Experience

The majority of recent purchasers are very satisfied with their mattress

How satisfied are you with the mattress you purchased most recently?



Millennials are the least likely to be very satisfied with their mattress purchase:

- 49% are very satisfied (vs. 57% of GenX and 65% of Boomers).

QE6 Base: Recent Purchasers (N=1501)

Factors contributing to satisfaction with mattress purchase

- In order to better understand the **aspects of a shopper's experience that have the greatest impact on mattress satisfaction**, we conducted a multivariate analysis.
- Potential factors examined included:
 - Satisfaction with shopping experience
 - Satisfaction with sleep
 - Feeling knowledgeable about mattress information at start of journey
 - Feeling knowledgeable about mattress information at time of purchase
 - Number of information channels used during exploration
 - Amount of information sought during exploration (i.e. number of different types)
- The analysis controlled for age, income and gender.



Satisfaction with the shopping experience is the strongest driver of mattress satisfaction

The analysis revealed that four factors have a significant impact on Satisfaction with Mattress Purchase:

- **Satisfaction with Shopping Experience** has the **largest impact**.
- **Feeling Knowledgeable** about Mattress Information at Time of Purchase (e.g., brands, prices, types, features, etc.) also has an impact, but to a lesser extent than Satisfaction with Shopping Experience
- **Satisfaction with Sleep** and **Amount of Information Sought** during Exploration also had a small, yet significant, impact.



Note: The color intensity indicates the relative size of the influence of the factor on Satisfaction with Mattress Purchase

The buyer's journey presents an opportunity to increase satisfaction with their mattress purchase

The results of the analysis reveal that the buyer's experiences during their journey has an impact on their satisfaction with their mattress.

- Improving satisfaction with their journey provides opportunities to increase satisfaction with their purchase.

The next sections examine the journeys of two important audiences among recent purchasers:

- **Millennials.** How does their journey differ from other generational segments, and does it have implications for improving their satisfaction with their purchase?
- **Very Satisfied Purchasers.** How does their journey differ from those who are less satisfied with their mattress purchase?

DETAILED FINDINGS

Purchase Journey by Generations

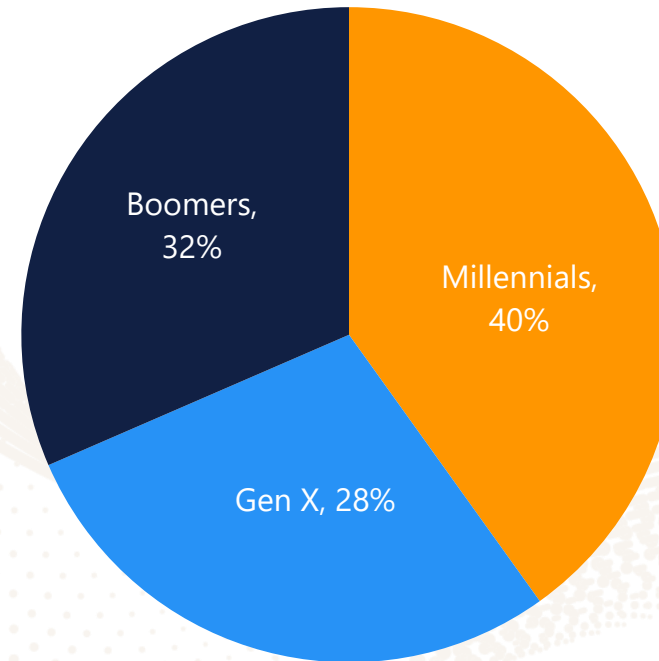
TRIGGER ⇒ EXPLORATION ⇒ CONSIDERATION AND EVALUATION ⇒ PURCHASE

Generation Segments

Note: In this report, Generation labels refer to the following age groups:

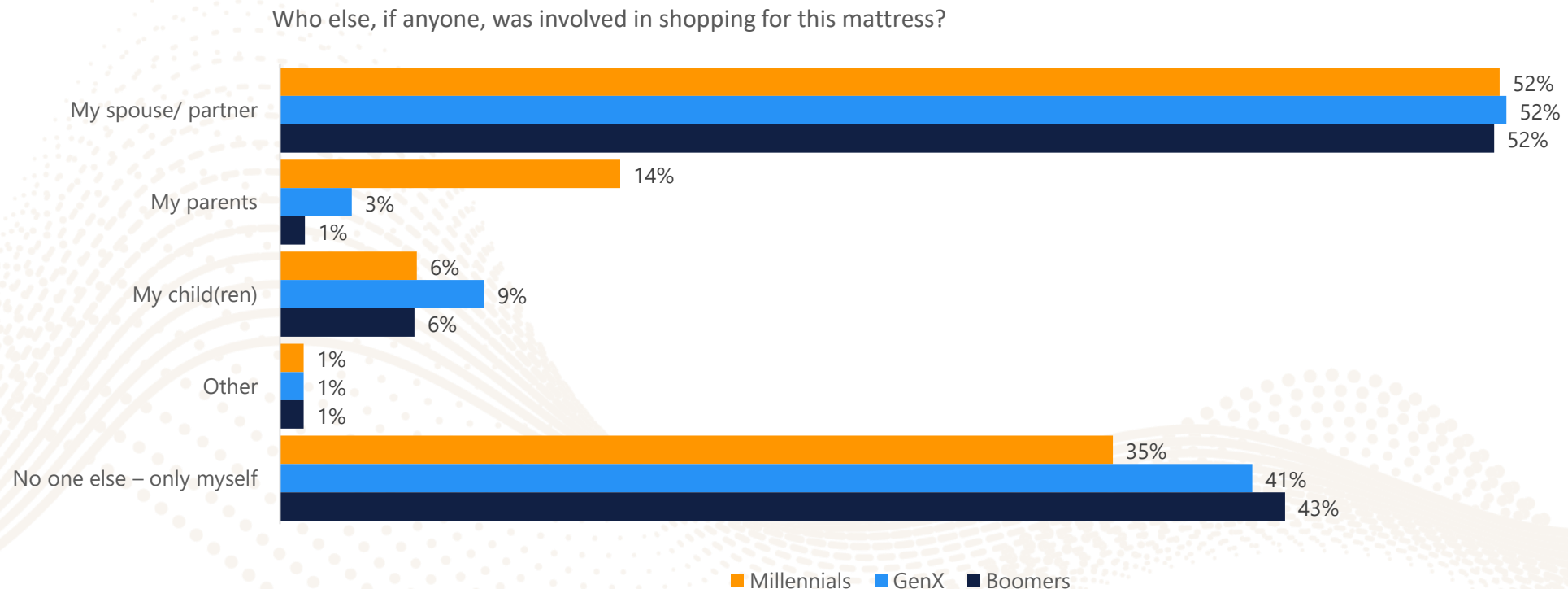
- Millennials: 18-39 years old
- GenX: 40-54 years old
- Boomers: 55+ years old

Recent Purchasers



Q3 Base: Recent Purchasers (N=1501)

The majority of buyers include others in their purchase journey; Millennials are the least likely to shop by themselves

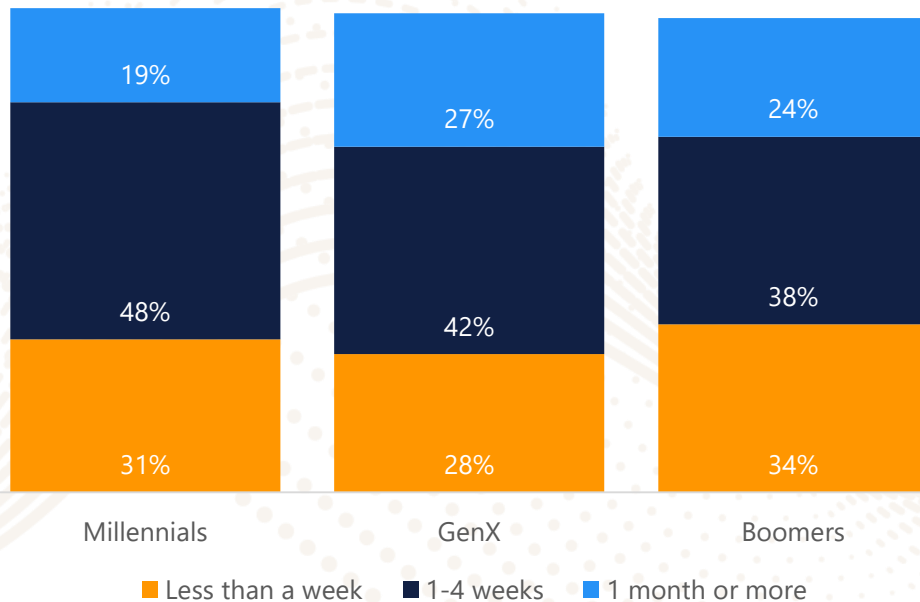


QB13 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

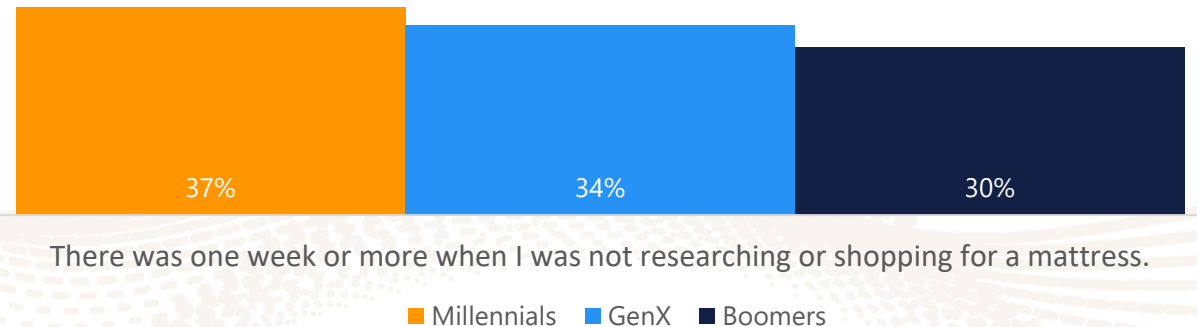
Most journeys take more than a week and Millennials are more likely to report an interruption in their journey

Boomers are twice as likely as Millennials to “just make the purchase” and not explore, evaluate or seriously consider options as part of their journey (22% vs. 11%).

Overall, how long a time period did the researching, shopping and purchasing process for a new mattress take?



% Yes

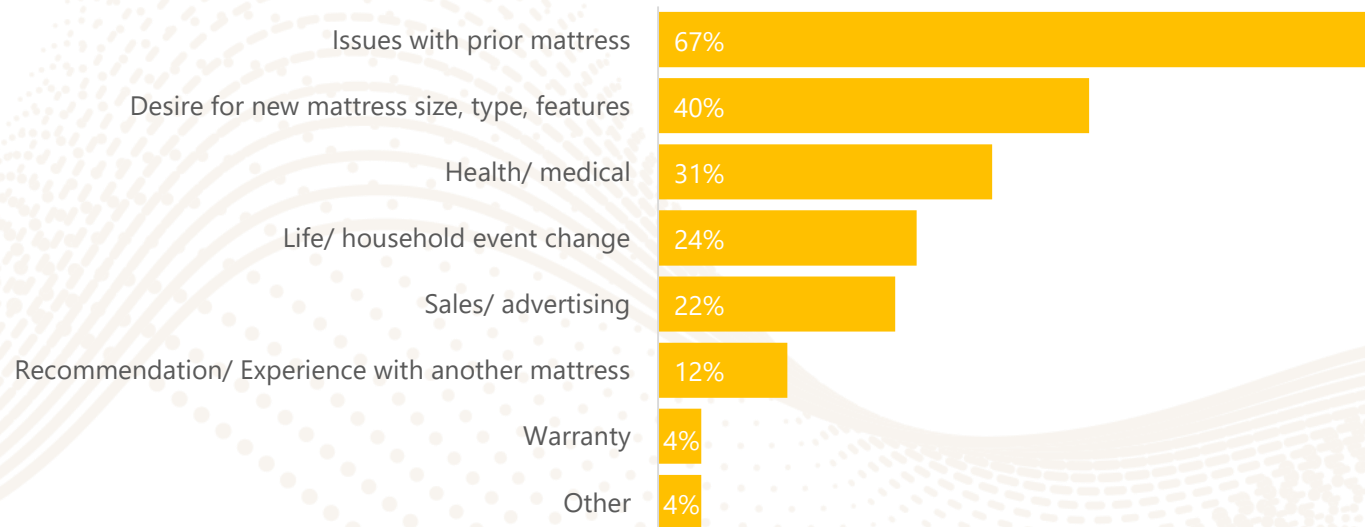


There was one week or more when I was not researching or shopping for a mattress.

QB11, QB12 and QC5 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Most journeys are prompted by issues with their prior mattress

What prompted you to begin shopping for a new mattress?
(Categories of Trigger Events)



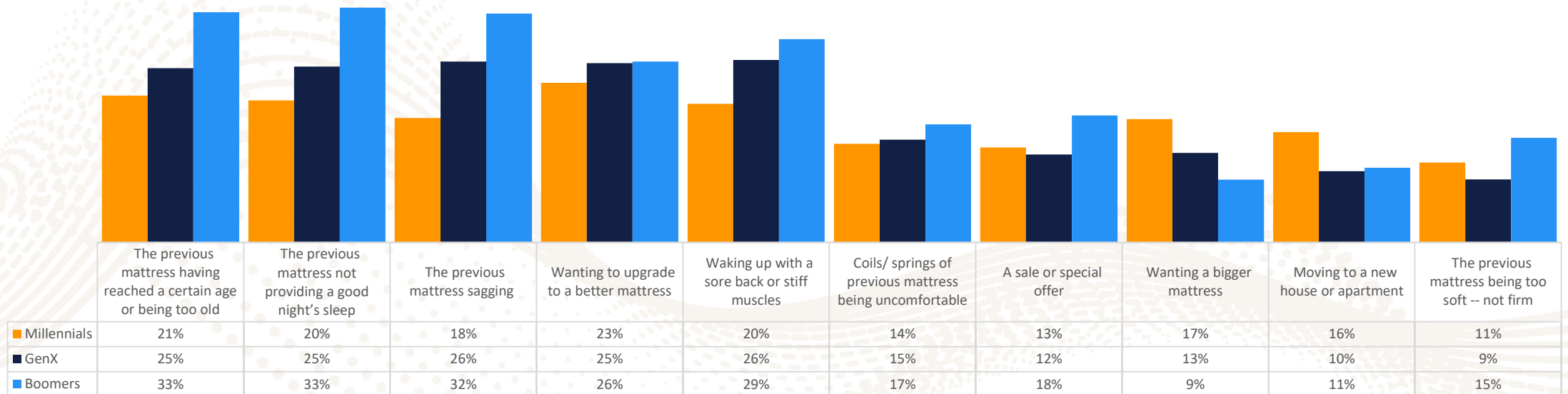
Millennials are more likely to begin shopping because of the following types of trigger events:

- Life/ household event change (30% vs. 19% GenX and 22% Boomers); and
- Warranty (5% vs. 3% GenX and 2% Boomers).

QC1 Base: Recent Purchasers (N=1501)

Overall, the most common trigger events are a previous mattress being too old, not providing a good night's sleep or sagging

Top Trigger Events



QC1 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Millennials' top triggers are wanting to upgrade their mattress or a previous mattress being too old

Top 5 Trigger Events: Millennials vs. Boomers

Millennials

- 1 Wanting to upgrade to a better mattress
- 2 Previous mattress reached a certain age/ too old
- 3 Previous mattress not providing a good night's sleep
- 4 Waking up with a sore back/ stiff muscles
- 5 Previous mattress sagging

Boomers

- 1 Previous mattress reached a certain age/ too old
- 2 Previous mattress not providing a good night's sleep
- 3 Previous mattress sagging
- 4 Waking up with a sore back/ stiff muscles
- 5 Wanting to upgrade to a better mattress

QC1 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

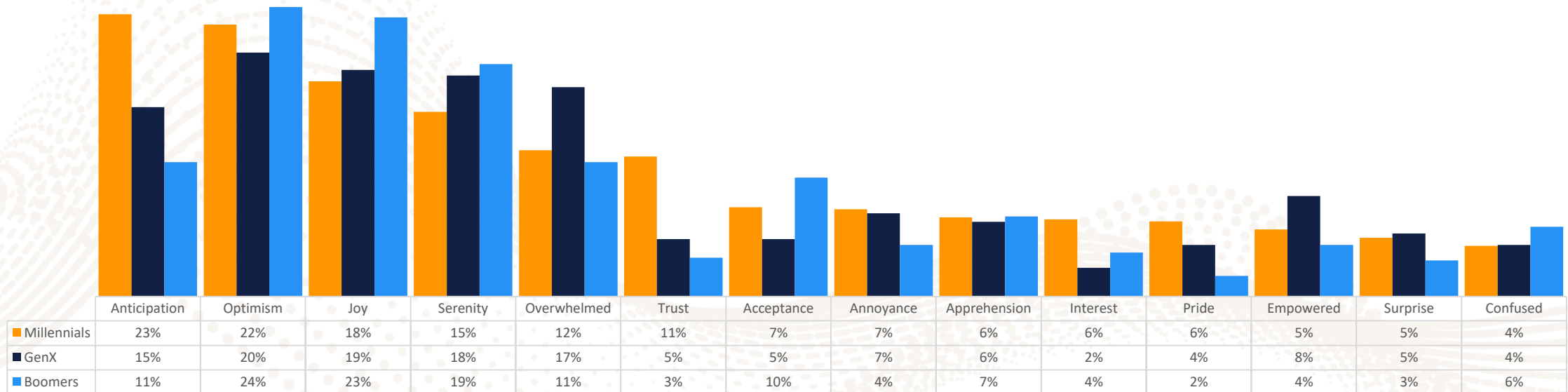
Trigger Emotions

- Optimism, joy and anticipation are the leading emotions at the start of the purchase journey.

At the start of the journey....

- Millennials are more likely than Boomers to experience anticipation (23% vs. 11%) and trust (11% vs. 3%).
- Boomers are more likely than Millennials to experience joy (23% vs. 18%).

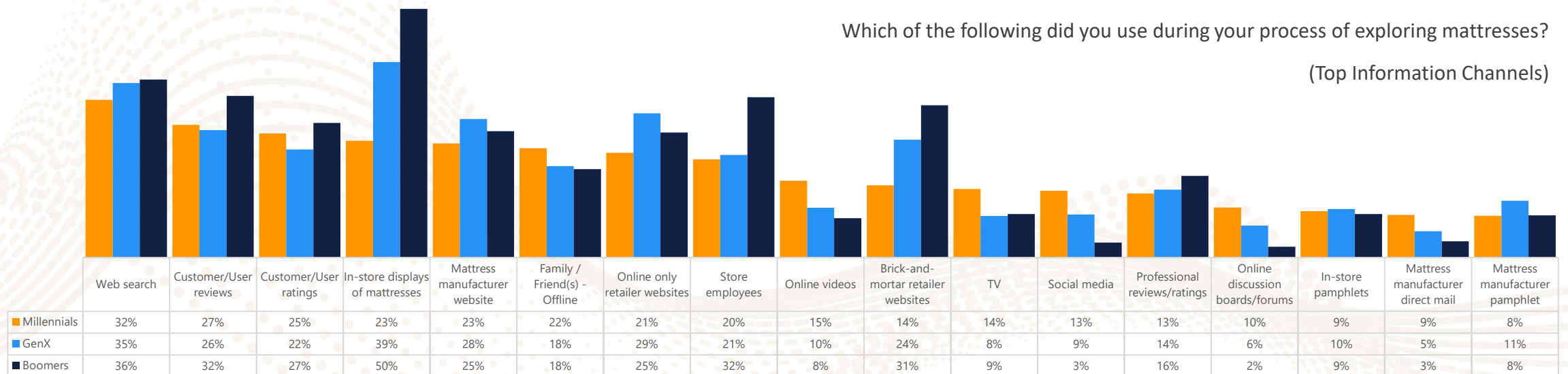
What emotions were you experiencing at the time that you decided to start looking for a new mattress?
(Top Emotions)



QC3 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Exploration: Information Channels

- Overall, recent purchasers who engaged in exploration utilized an average of 3 information sources.
- Millennials focus more on online channels, utilizing web searches, user reviews, and user ratings
- Boomers focus more on brick & mortar-based information, with half of Boomers utilizing in-store displays; utilization of store employees and brick & mortar websites were also much more prevalent among Boomers.

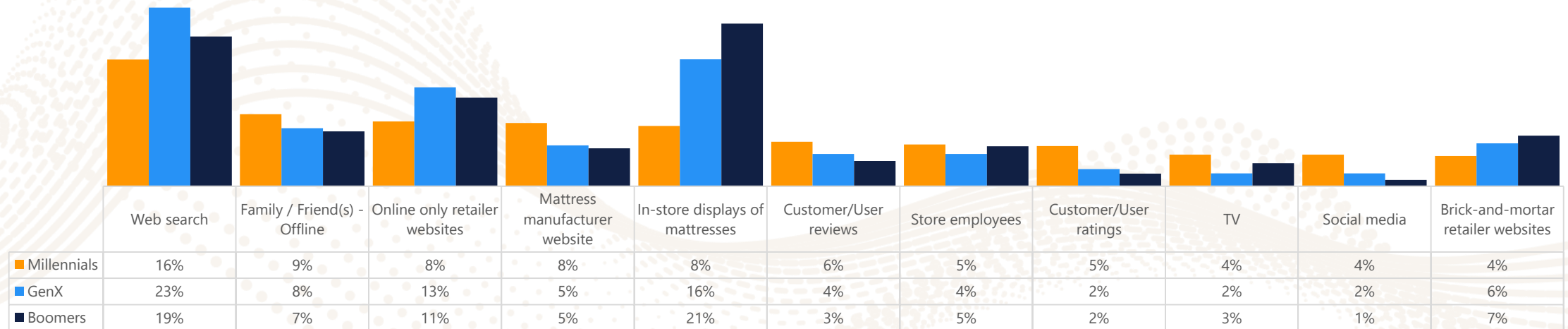


QC6 Base: Recent Purchasers and Explored/Compared/Considered (Millennials N=538, GenX N=360, Boomers N=367)

Exploration: First Step

- Boomers are most likely to start their exploration at an in-store displays.
- GenX are most likely to start with a web search.
- Millennials have the most diverse assortment of first steps – most prevalent was a web search.

Which source of information did you use first?
(Top Information Channels)

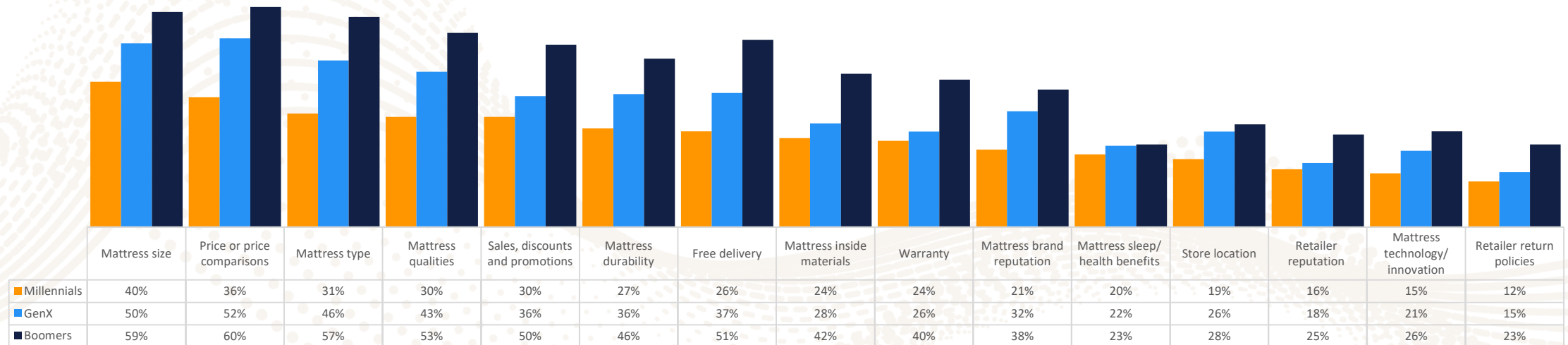


QC8 Base: Recent Purchasers and Explored/Compared/Considered (Millennials N=538, GenX N=360, Boomers N=367)

Exploration: Information Sought

- On average, Boomers seek more types of information during the exploration phase (8 vs. 5 types).
- Millennials most often seek information on mattress size, price, type, qualities, and sales.
- Boomers most often seek information on price, mattress size, type, qualities, free delivery, and sales.

Information looked for or used when exploring mattresses
(Top Types of Information)

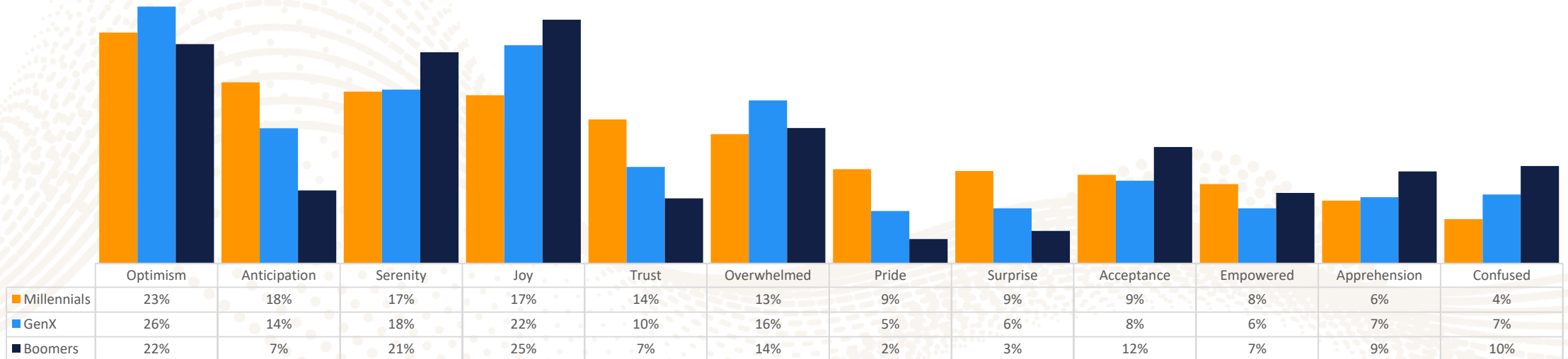


QC10 Base: Recent Purchasers and Explored/Compared/Considered (Millennials N=538, GenX N=360, Boomers N=367)

Exploration: Emotions

During exploration...

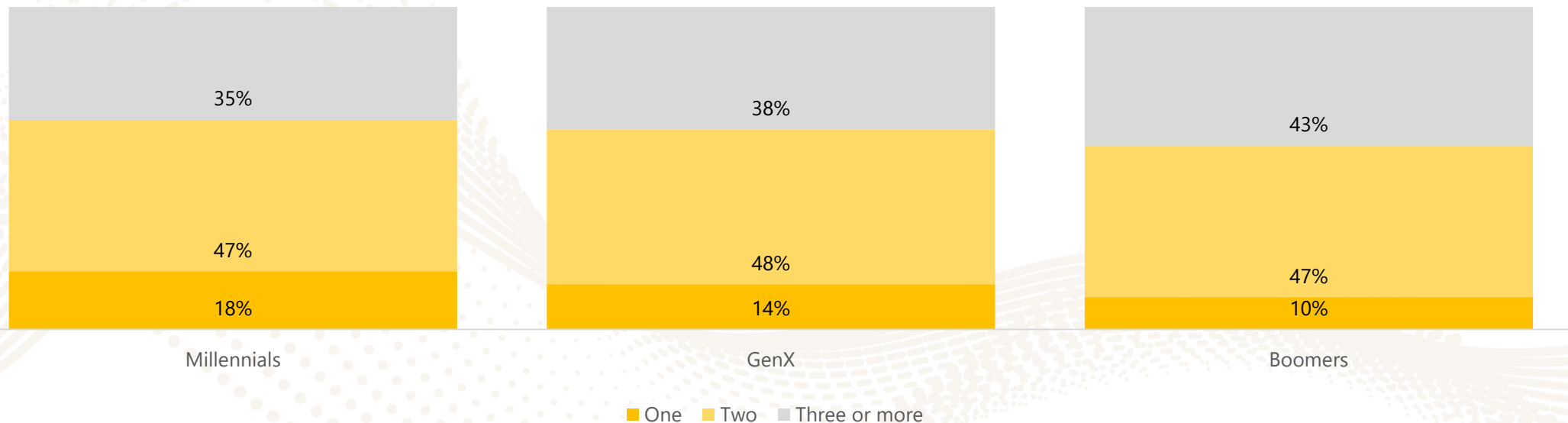
- **Millennials** are more likely than Boomers to experience **anticipation** (18% vs. 7%), **trust** (14% vs. 7%), **surprise** (9% vs. 3%) and **pride** (9% vs. 2%).
- **Boomers** are more likely than Millennials to feel **joy** (25% vs. 17%) and **confused** (10% vs. 4%).



QC12 Base: Recent Purchasers and Explored/Compared/Considered (Millennials N=538, GenX N=360, Boomers N=367)

The overwhelming majority of buyers seriously consider two or more different mattresses before purchase; Millennials are more likely than Boomers to consider only one

How many different mattresses did you seriously consider before selecting the mattress that you purchased?

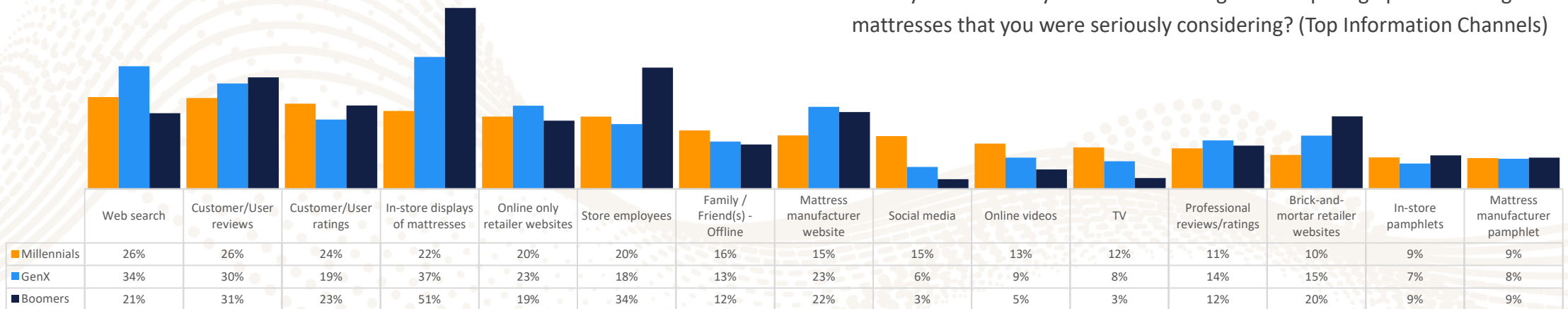


QD4 Base: Recent Purchasers and Explored/Compared/Considered (Millennials N=538, GenX N=360, Boomers N=367)

Evaluation/Comparison: Information Channels

- Overall, those purchasers who seriously considered two or more mattresses utilize an average of three information sources during their comparison/ evaluation stage.
- Millennials utilize the broadest range of information sources, focused most frequently on online sources, including web searches, user reviews, and user ratings.
- Boomers continue to focus more on brick & mortar-based information, with more than half of Boomers utilizing in-store displays and a third relying on store employees for comparison/evaluation information.

What sources of information did you use when you were evaluating and comparing options among the mattresses that you were seriously considering? (Top Information Channels)

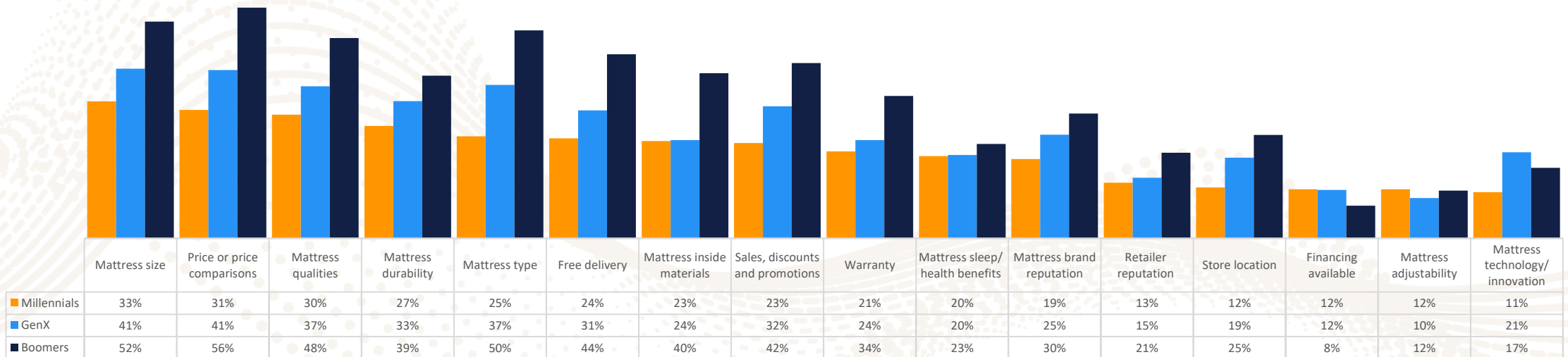


QD5 Base: Recent Purchasers and Seriously Considered Two+ Mattresses (Millennials N=439, GenX N=308, Boomers N=329)

Evaluation/Comparison: Information Sought

- Millennials most frequently seek information on mattress size, price, qualities, and durability.
- Boomers seek more types of information, especially price, mattress size, and type, followed by qualities, free delivery, sales, and materials inside the mattress.

Information looked for or used when evaluating and comparing mattresses
(Top Types of Information)

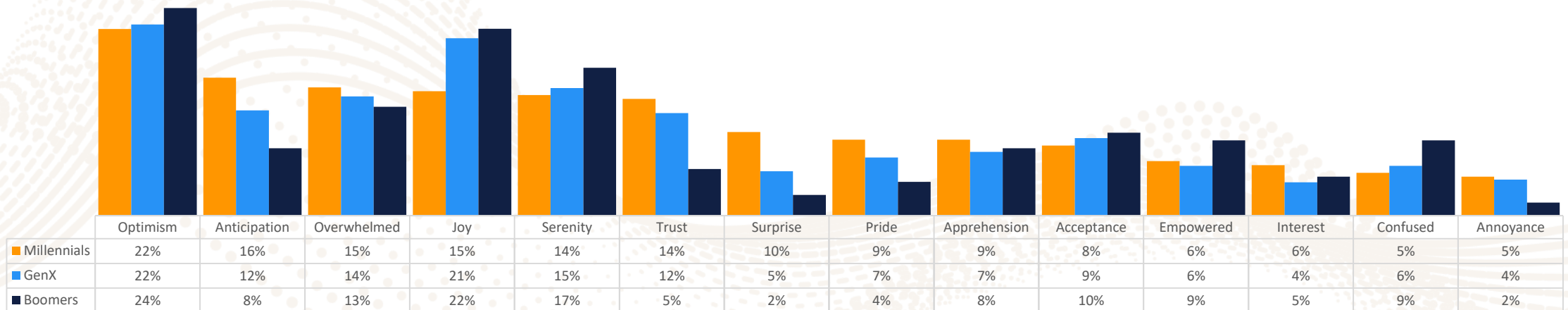


QD6 Base: Recent Purchasers and Seriously Considered Two+ Mattresses (Millennials N=439, GenX N=308, Boomers N=329)

Evaluation/Comparison: Emotions

During evaluation and comparison...

- Millennials are more likely than Boomers to experience anticipation (16% vs. 8%), trust (14% vs. 7%), surprise (9% vs. 3%), pride (9% vs. 2%) and annoyance (5% vs. 2%).
- Boomers are more likely than Millennials to feel joy (22% vs. 15%) and confused (9% vs. 5%).

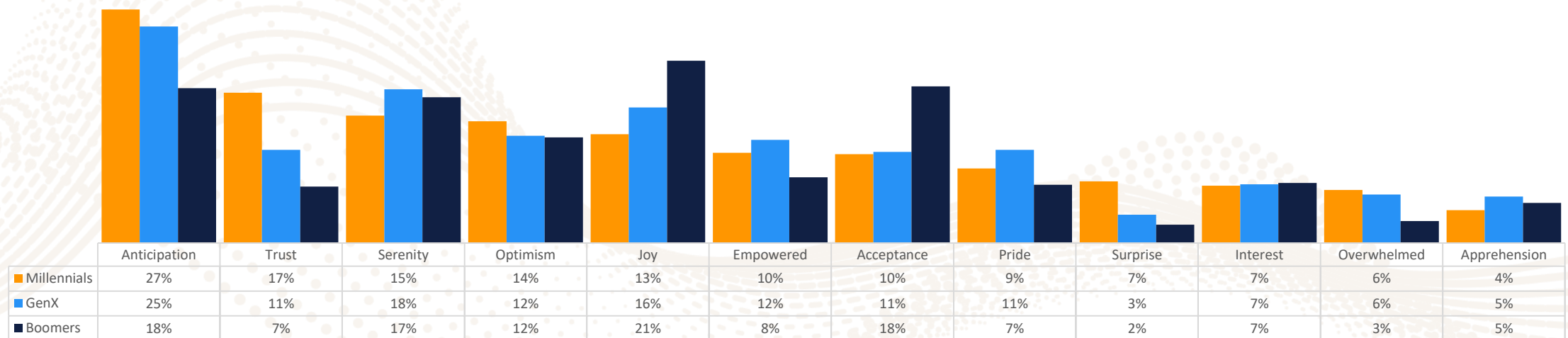


QD7 Base: Recent Purchasers and Seriously Considered Two+ Mattresses (Millennials N=439, GenX N=308, Boomers N=329)

Purchase: Emotions

At the time of their selection decision...

- Millennials are more likely than Boomers to experience anticipation (27% vs. 18%), trust (17% vs. 7%), surprise (7% vs. 2%), and overwhelmed (6% vs. 3%).
- Boomers are more likely than Millennials to feel joy (21% vs. 13%) and acceptance (18% vs. 10%).

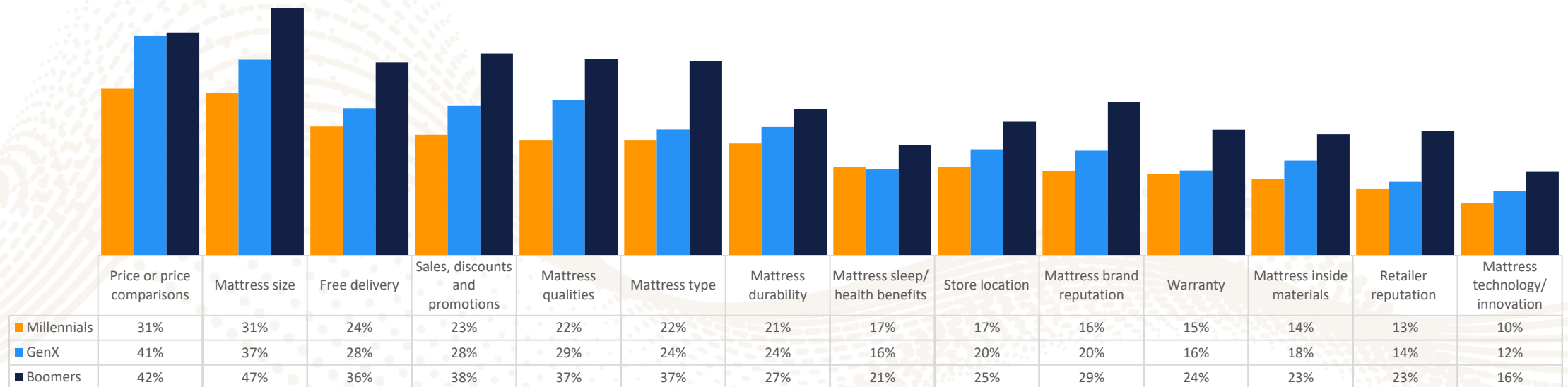


QE1 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Purchase: Selection Criteria

Overall, mattresses are most often selected based on price and size.

- Millennials select fewer reasons, but most frequently make their mattress purchase based on price and mattress size.
- Boomers specify a variety of criteria, especially mattress size, price, sales, qualities, type, and free delivery.

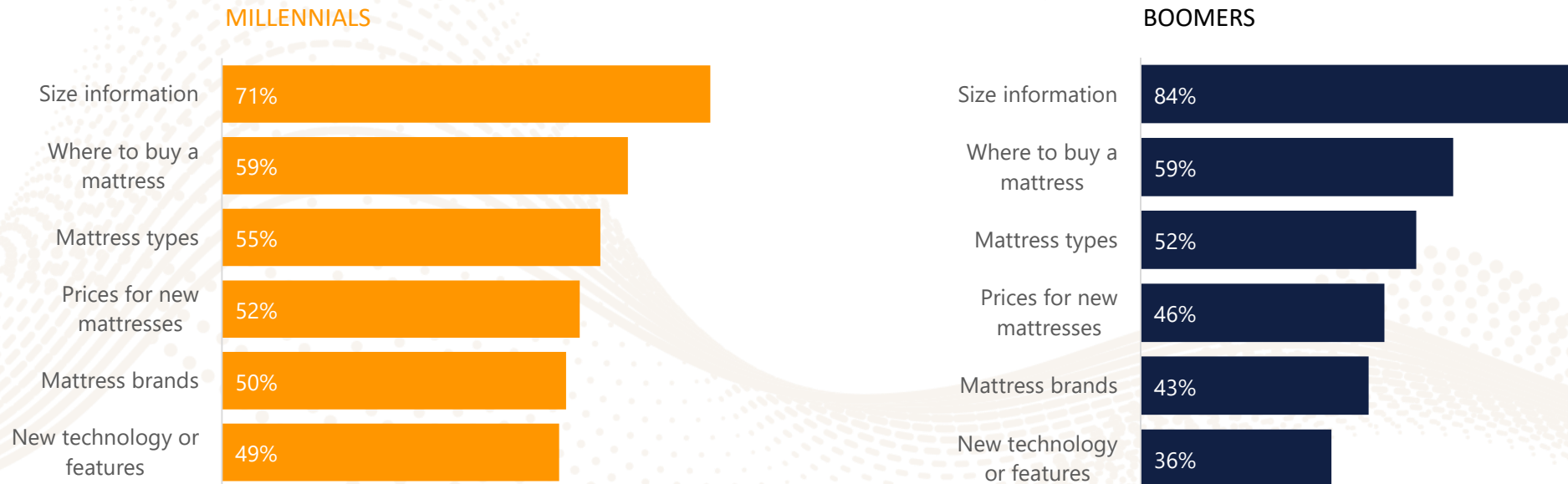


QE3 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Knowledge at Purchase Stage

At the end of the purchase journey, Millennials still considered themselves significantly more knowledgeable about mattress prices, brands, and features compared to Boomers.

At the time you purchased your mattress, how knowledgeable did you feel about each of the following?
% Extremely/ Very Knowledgeable

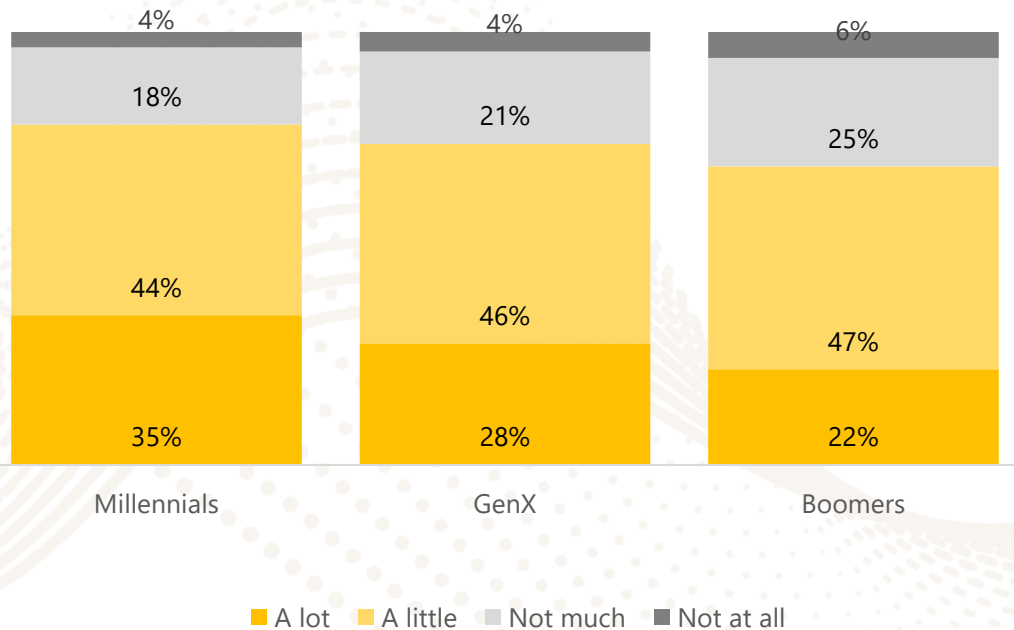


QE1A Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

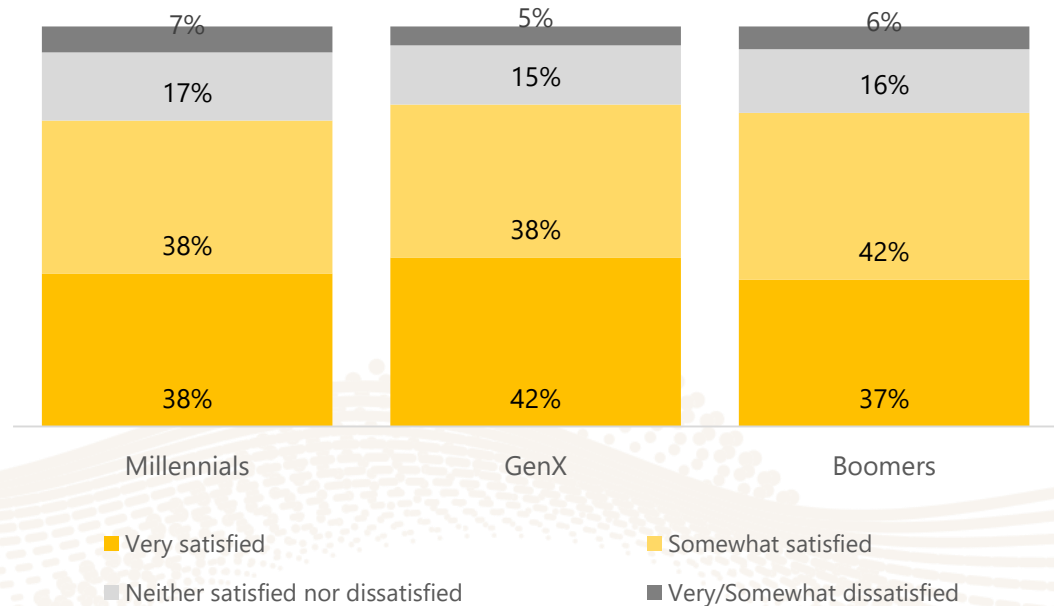
Shopping Enjoyment and Satisfaction

Millennials were significantly more likely to have enjoyed shopping for their purchase compared to Boomers.

Overall, how much did you enjoy shopping for this mattress?



Overall, how satisfied were you with your experience researching and shopping for this mattress?

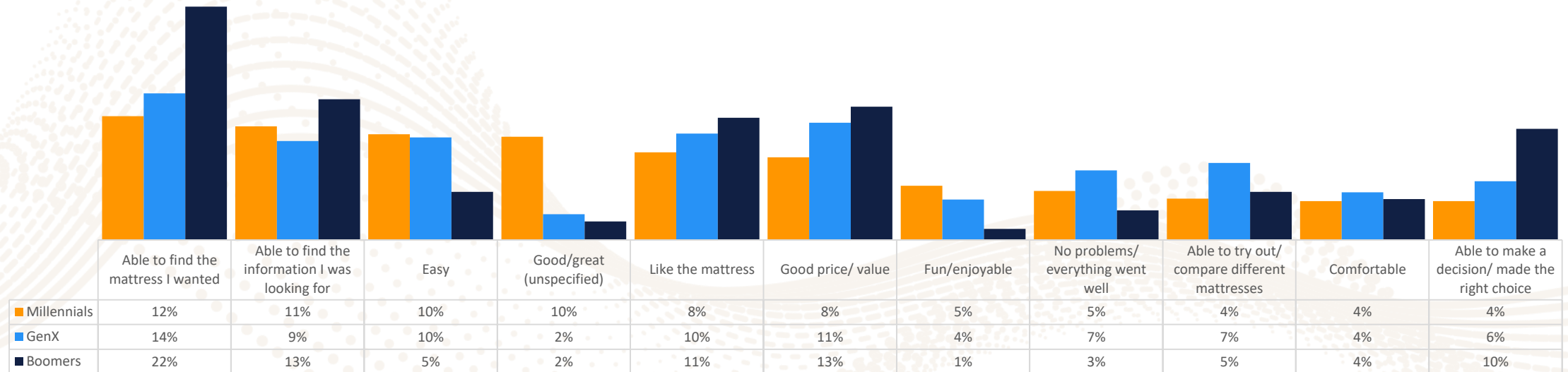


QD8 and D9 Base: Recent Purchasers and Explored/Compared/Considered (Millennials N=538, GenX N=360, Boomers N=367)

Purchase Journey: Reasons for Shopping Satisfaction

Overall, shopping satisfaction is tied to ease of finding the right mattress and finding the necessary information.

- Millennials are more likely than Boomers to say they were satisfied with their shopping experience because it was easy (10% vs. 5%) or fun (5% vs. 1%).
- Boomers are more likely than Millennials to mention being able to find the mattress they wanted (22% vs. 12%), good price/ value (13% vs. 8%) and feeling they made the right choice (10% vs. 4%).



QD8 Base: Recent Purchasers and Satisfied with Shopping and Researching Experience (Millennials N=412, GenX N=290, Boomers N=287)

Purchase Journey: Reasons for Shopping Satisfaction



Millennials: Very/Somewhat Satisfied because...

"I'm feeling independent, just got this house, so shopping for my own mattress is on another level for me; so, yes, I feel very much satisfied."

"Easy to view videos and readable content to research online. Able to see reviews and number of satisfied customers to narrow results of my choice."

"I found exactly what I was looking for and the research was enlightening."

"I was able to find all the information I needed online, as far as customer reviews, and ratings; I was also able to go in the store and try out the mattress that I liked to see if it would be a good fit."



Boomers: Very/Somewhat Satisfied because...

"Got a great bed at a super low price! Wanted an old-fashioned mattress...no gel, foam, water, air or other weird stuff. Just a very good, brand name mattress at a reasonable cost. Got it!!"

"After researching online, I felt that I was getting the right mattress that might help with my sciatica and the salesman in the store confirmed what I had read."

"We were introduced to a new option of using a hydraulic base to position the mattress to take pressure off our backs and better position ourselves to address reflux."

"The mattress that was recommended and purchased was one that had extremely good reviews and a good warranty, as well as a convenient brick and mortar location."

QD10 Base: Satisfied with shopping experience (Millennials N=412, GenX N=290, Boomers N=287)

Purchase Journey: Reasons for Shopping Dissatisfaction



Millennials: Very/Somewhat Dissatisfied because...

“Contradicting reviews and too many mattresses with almost the same names and appearances; or different names on different websites for the exact same mattress.”

“Too overwhelming with the prices, selections, and stores.”

Boomers: Very/Somewhat Dissatisfied because...

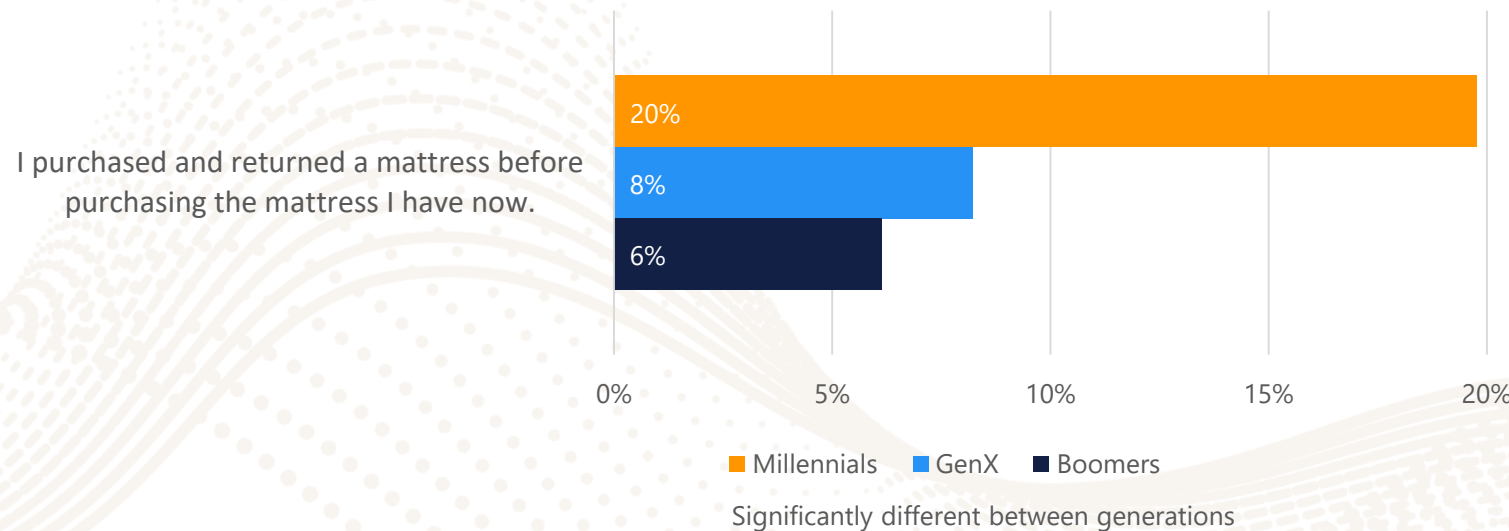
“Just too much information and every retailer has a different name for the same mattress. This made it impossible to compare the same mattress. Very frustrating. But they do that on purpose so you can't compare.”



QD11 Base: Dissatisfied with shopping experience (Millennials N=35, GenX N=17, Boomers N=21)

Purchase Journey: Returns/Exchanges

More than one in ten recent buyers (12%) returned a mattress before purchasing the mattress at the end of their journey. Millennials are more likely to have returned a mattress as part of their journey.



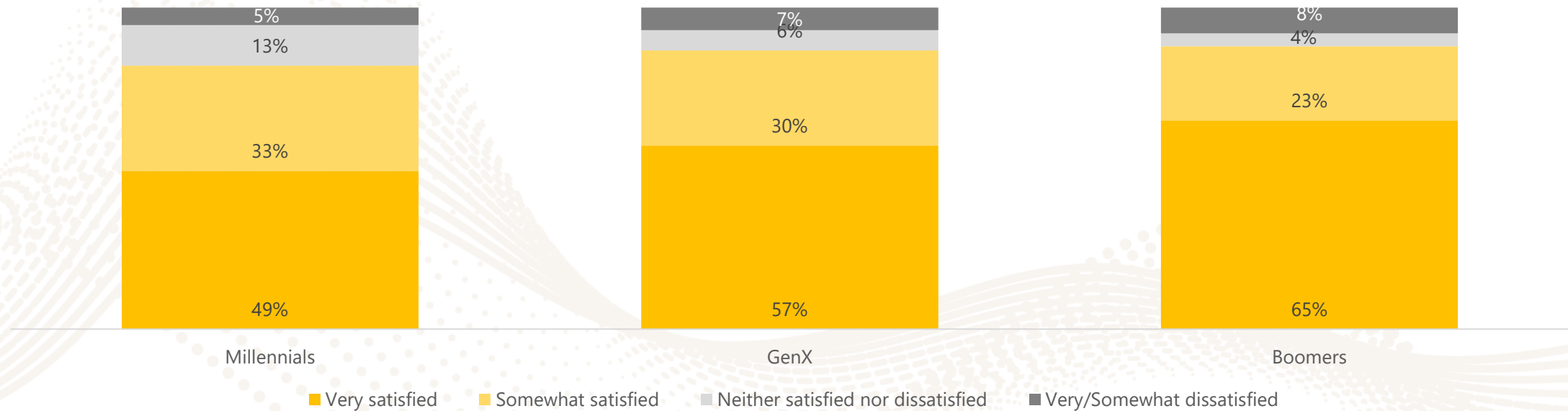
Among those whose mattress was purchased within the last 3 months, Millennials are more likely than Boomers to say they are extremely/very likely to return their mattress (38% vs. 6%).

QB12 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Purchase Journey: Mattress Satisfaction

Boomers are more likely than Millennials to be very satisfied with their mattress purchase.

How satisfied are you with the mattress you purchased most recently?

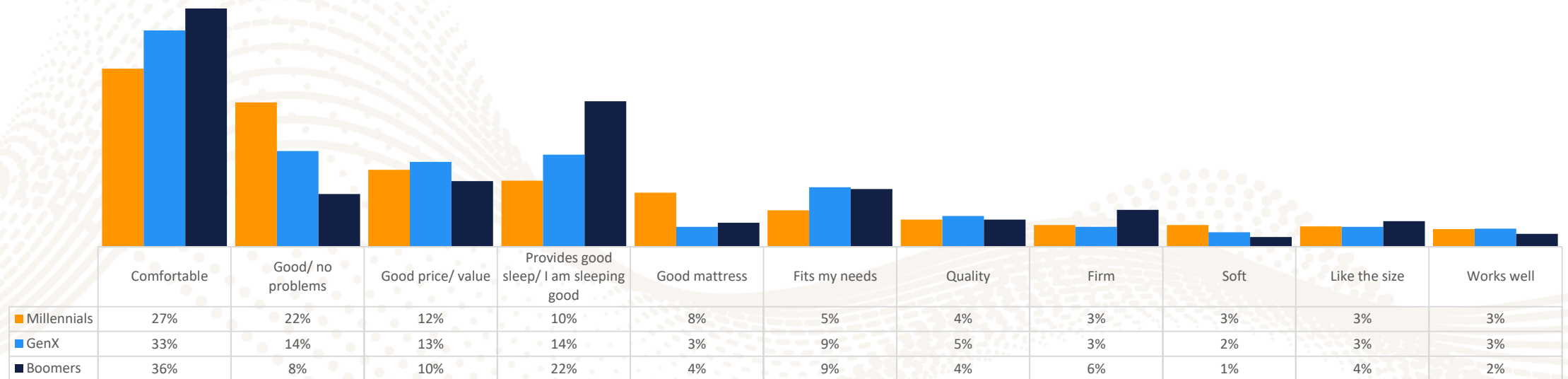


QE6 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Purchase Journey: Reasons for Mattress Satisfaction

Overall, the top reasons for being satisfied with their mattress were comfort and providing a good sleeping experience.

- Millennials are more likely than Boomers to say they were satisfied because it is a good mattress (8% vs. 4%).
- Boomers are more likely than Millennials to mention comfort (36% vs. 27%) and provides good sleep (22% vs. 10%).



QE7 Base: Recent Purchasers and Satisfied with Mattress (Millennials N=493, GenX N=369, Boomers N=416)

Purchase Journey: Reasons for Mattress Satisfaction



Millennials: Very/Somewhat Satisfied because...

"Extremely comfortable, reasonably priced."

"I am extremely satisfied, because I am getting a good sleep better and not waking with aches as before."

"I would consider myself satisfied with my most recently purchased mattress because I purchased it for my child, and they sleep very well on it and end up waking up in a good mood from good sleep and because it's really soft."

"My bed helps me sleep and rest my body because of my busy days."

"I have no issues and works like a charm. Best sleep in a long time."

Boomers: Very/Somewhat Satisfied because...

"Comfortable and I feel much better in the morning."

"I no longer hurt when I wake up and I am not stiff anymore. It is very comfortable."

"It has addressed our medical issues, we are sleeping better and feeling more rested during the day."

"Very comfortable and a good price with quick delivery."

"Price, delivery, recycle, made in USA."

"As was for guestroom, I wanted a soft mattress and help delivering. I purchased near my family location and they helped me get it home and set it up."



QE7 Base: Satisfied with mattress (Millennials N=493, GenX N=369, Boomers N=416)

Purchase Journey: Reasons for Mattress Dissatisfaction



Millennials: Very/Somewhat Dissatisfied because...

"It hurts my back sometimes maybe because it's too soft."

"It is cheap and very uncomfortable."

"The mattress is too firm and we can't figure out how to return it."

Millennials: Very/Somewhat Dissatisfied because...

"It is not as comfortable as I thought it would be."

"After less than a year, the spot on the side that I sit on to get into bed already has a deep dip."

"Felt like it was sagging on the edge, I believe the memory foam makes me feel like that."

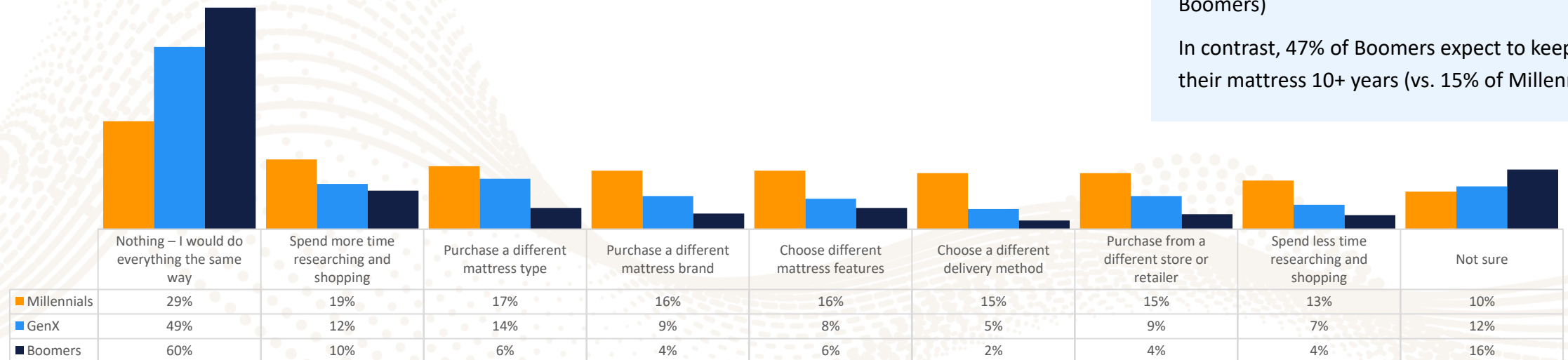


QE8 Base: Dissatisfied with mattress (Millennials N=33, GenX N=30, Boomers N=38)

Purchase Journey: Lessons Learned

- 6 in 10 Boomers said they would make their next mattress purchase the same way as this one.
- Just 3 in 10 Millennials said they would make their next mattress purchase the same way. 2 in 10 said next time they will spend more time researching and shopping.

What, if anything, would you do differently the next time you need to purchase a mattress?



62% of Millennials expect to keep their mattress less than 10 years (vs. 31% of Boomers)

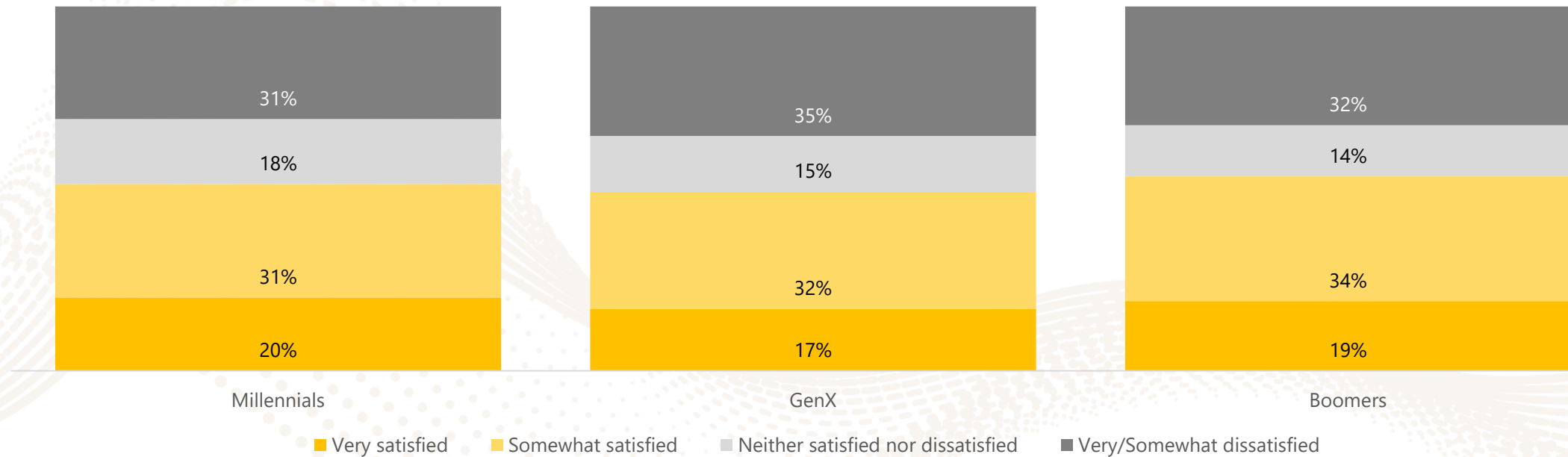
In contrast, 47% of Boomers expect to keep their mattress 10+ years (vs. 15% of Millennials)

QE11 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Purchase Journey: Sleep Satisfaction

Overall, half (51%) of recent purchasers are very or somewhat satisfied with the quality of their sleep.

In general, how satisfied are you with the quality of your sleep?



QA4 Base: Recent Purchasers (Millennials N=602, GenX N=426, Boomers N=473)

Recap: The Millennial Buyer's Journey

TRIGGER

- Top triggers are wanting to upgrade and previous mattress being too old; more likely to mention life event change
- Top emotions are anticipation and optimism
- Feel knowledgeable about mattresses, especially size and where to buy

EXPLORATION

- Involve others in shopping
- Initially use online information channels, such as web searches and user reviews and ratings; less likely than Boomers to use in-store displays
- Interested in information on size and price
- Seek less information than Boomers
- Top emotions are optimism, anticipation, serenity and joy; less likely than Boomers to experience joy or confusion

EVALUATION/CONSIDERATION

- Typically consider two different mattresses; consider fewer mattresses than Boomers
- Use online information channels, such as web searches and user reviews and ratings; less likely than Boomers to use in-store displays
- Interested in information on size, price and mattress qualities
- Top emotions are optimism, anticipation and feeling overwhelmed; more likely than Boomers to feel anticipation and trust

PURCHASE

- Top emotion is anticipation; less likely than Boomers to feel joy
- Top reasons for selection are price and size; mention fewer reasons than Boomers
- Feel knowledgeable about size, where to buy, types, prices and brands and new technology
- Enjoyed the shopping experience – more so than Boomers
- More likely than Boomers to have returned a mattress as part of journey
- Less likely to be satisfied with mattress
- Expect to keep mattress less than 10 years
- Would do things differently the next time

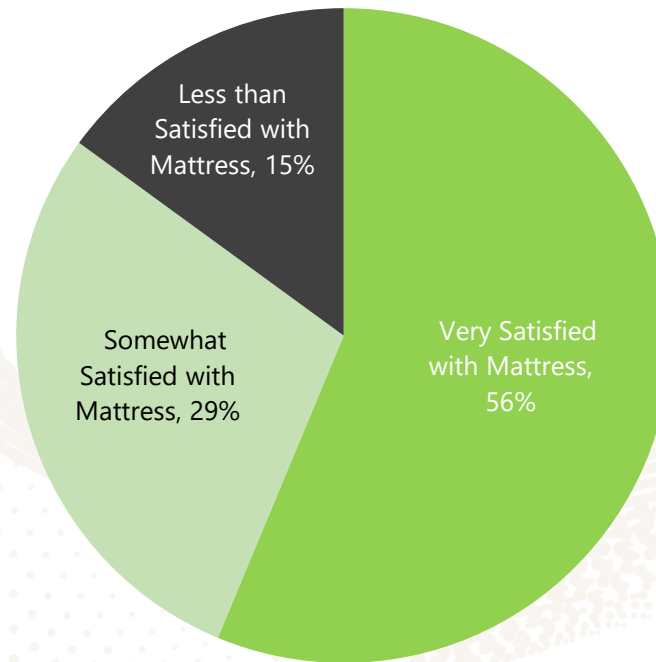
DETAILED FINDINGS

Purchase Journey by Mattress Satisfaction

TRIGGER ⇒ EXPLORATION ⇒ CONSIDERATION/EVALUATION ⇒ PURCHASE

Mattress Satisfaction Segments

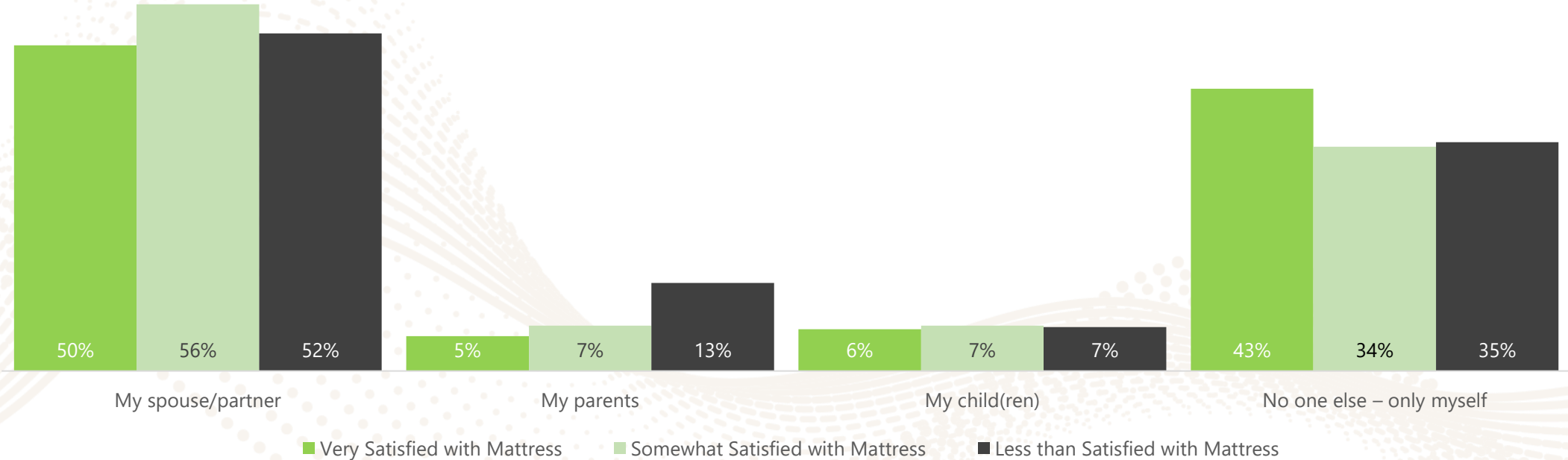
Recent Purchasers



QE6 Base: Recent Purchasers (N=1501)

Very satisfied mattress purchasers are more likely than others to have shopped by themselves

Who else, if anyone, was involved in shopping for this mattress?

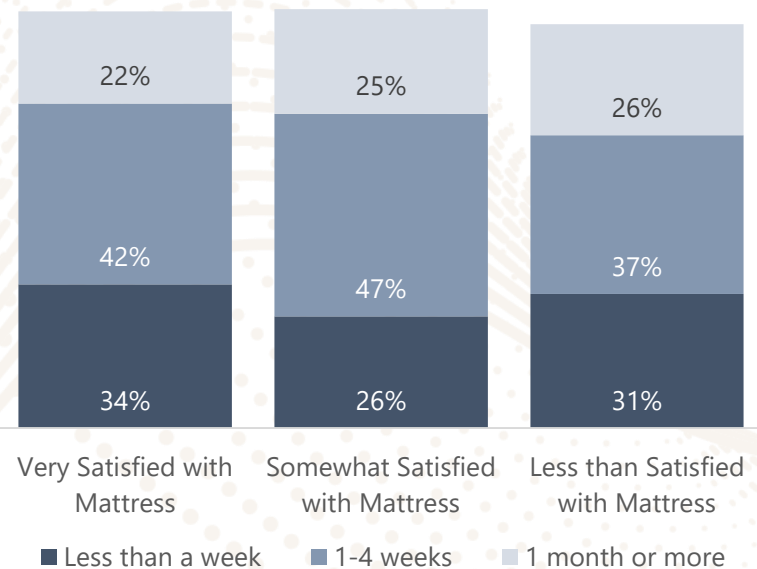


QB13 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

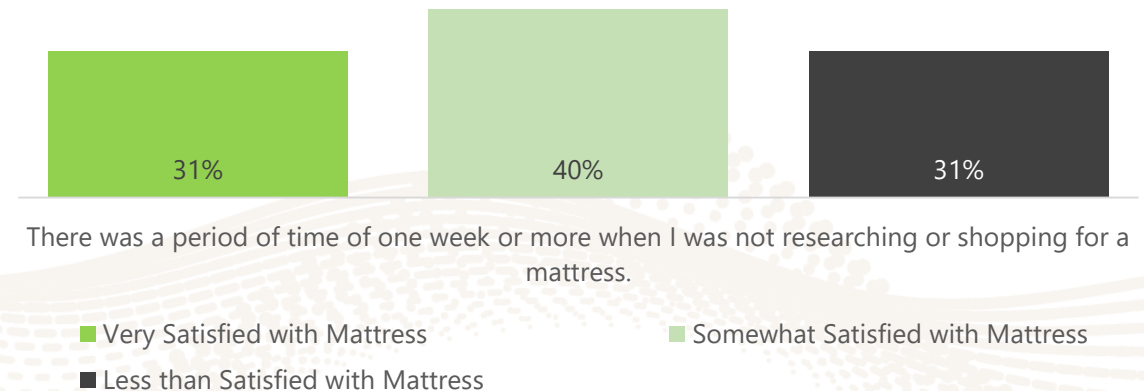
In general, journey length does not differ by mattress satisfaction

16% of buyers “just make the purchase” and not explore, evaluate or seriously consider options as part of their journey.

Overall, how long a time period did the researching, shopping and purchasing process for a new mattress take?



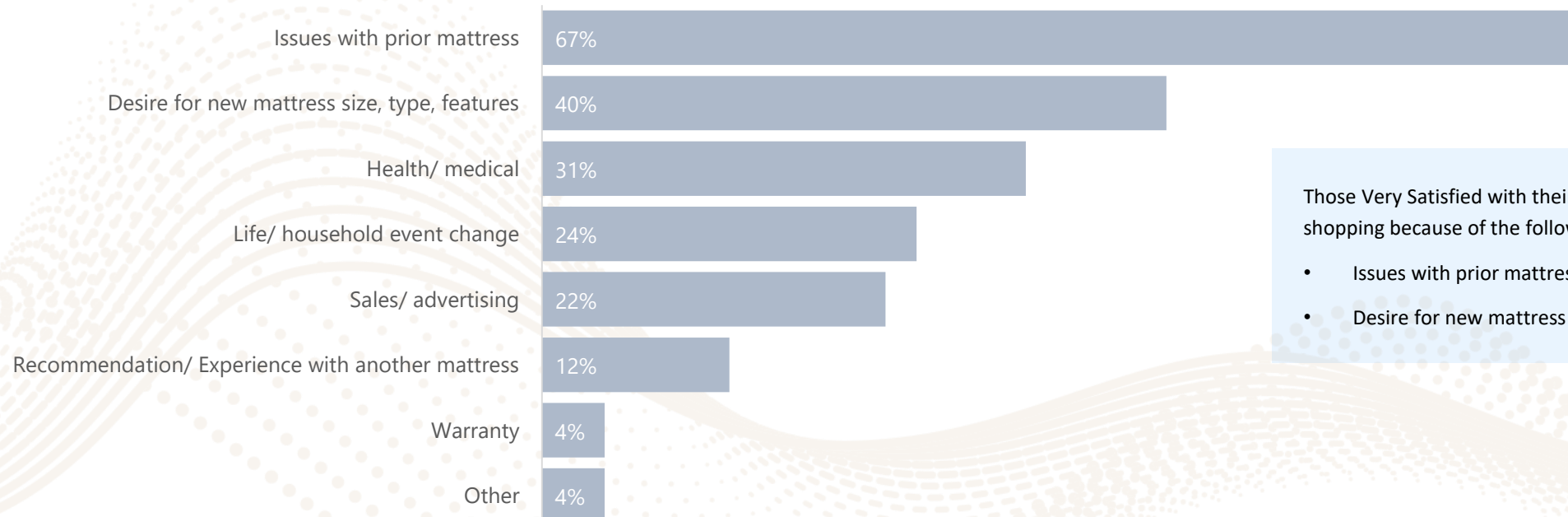
% Yes



QB11, QB12 and C5 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Most journeys are prompted by issues with their prior mattress

What prompted you to begin shopping for a new mattress?
(Categories of Trigger Events)



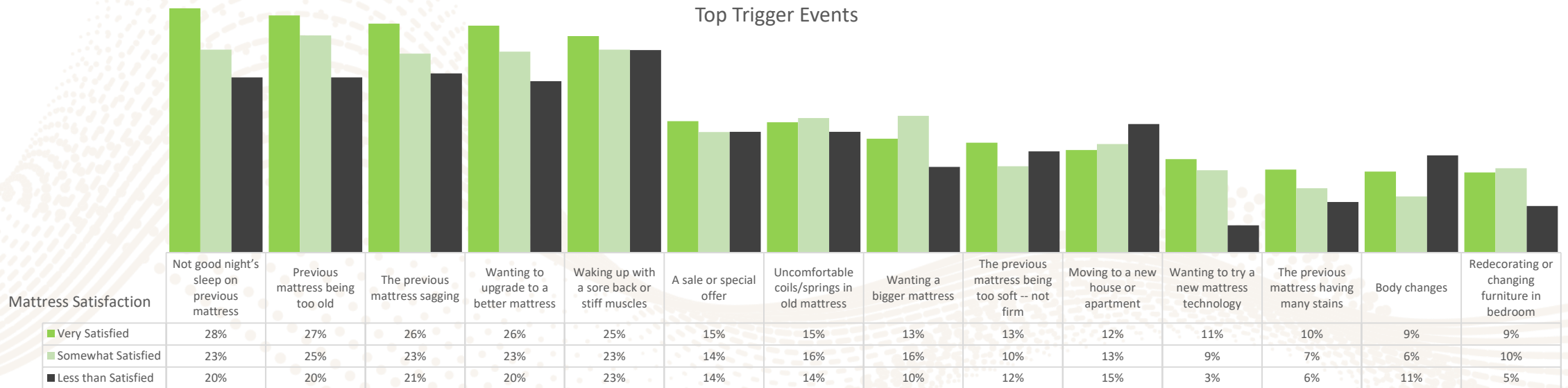
Those Very Satisfied with their mattress are more likely to begin shopping because of the following types of trigger events:

- Issues with prior mattress (69% vs. 61%)
- Desire for new mattress features (42% vs. 30%)

QC1 Base: Recent Purchasers (N=1501)

Overall, the most common trigger events are a previous mattress being too old, not providing a good night's sleep or sagging

Top Trigger Events



QC1 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Very satisfied purchasers' top triggers are previous mattress not providing a good night's sleep or being too old

Top 5 Trigger Events Very Satisfied vs. Less than Satisfied

Very Satisfied with Mattress

1. Previous mattress not providing a good night's sleep
2. Previous mattress reached a certain age/ too old
3. Previous mattress sagging
4. Wanting to upgrade to a better mattress
5. Waking up with a sore back/ stiff muscles

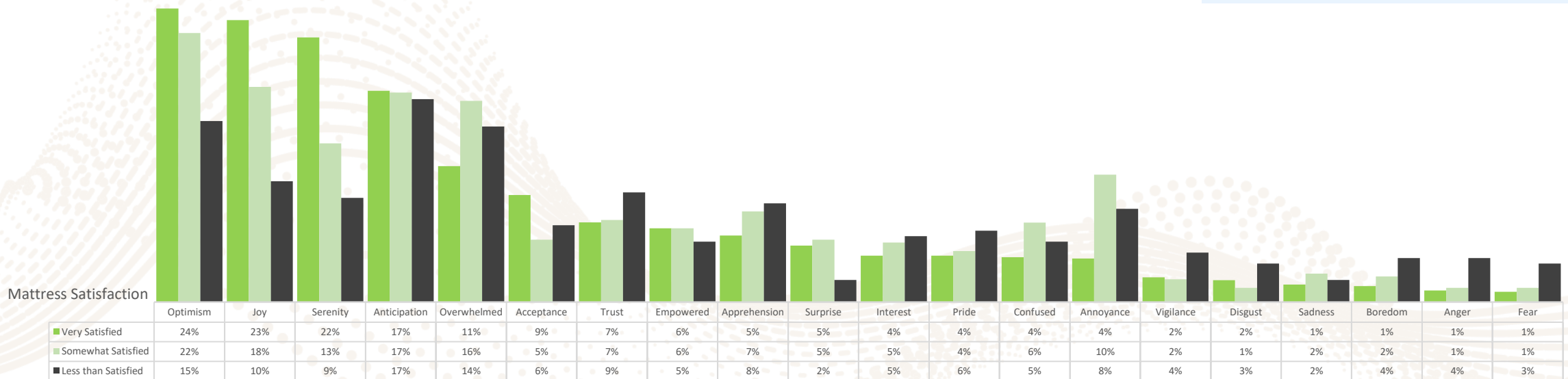
Less than Satisfied with Mattress

1. Waking up with a sore back/ stiff muscles
2. Previous mattress sagging
3. Previous mattress not providing a good night's sleep
4. Previous mattress reached a certain age/ too old
5. Wanting to upgrade to a better mattress

QC1 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Trigger Emotions

What emotions were you experiencing at the time that you decided to start looking for a new mattress?
(Top Emotions)



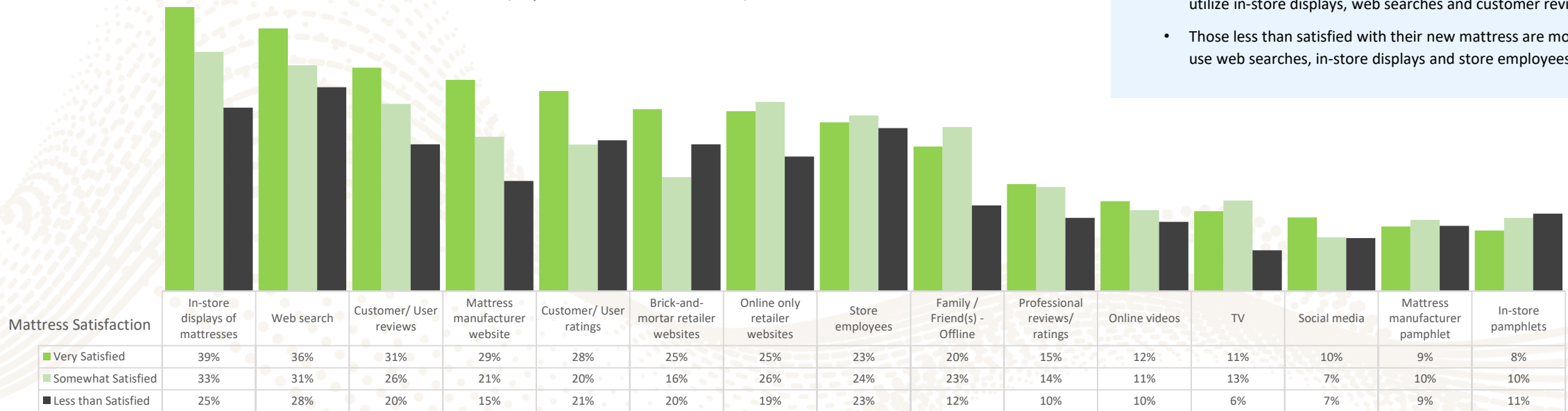
At the start of the journey....

- Very satisfied purchasers are more likely than less than satisfied purchasers to experience positive emotions (74% vs. 60%), including optimism (24% vs. 15%), joy (23% vs. 10%) and serenity (22% vs. 9%).
- Less than satisfied purchasers are more likely than very satisfied purchasers to experience negative emotions (41% vs. 24%), including annoyance (8% vs. 4%), anger (4% vs. 1%), boredom (4% vs. 1%), and fear (3% vs. 1%).

QC3 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Exploration: Information Channels

Which of the following did you use during your process of exploring mattresses?
(Top Information Channels)



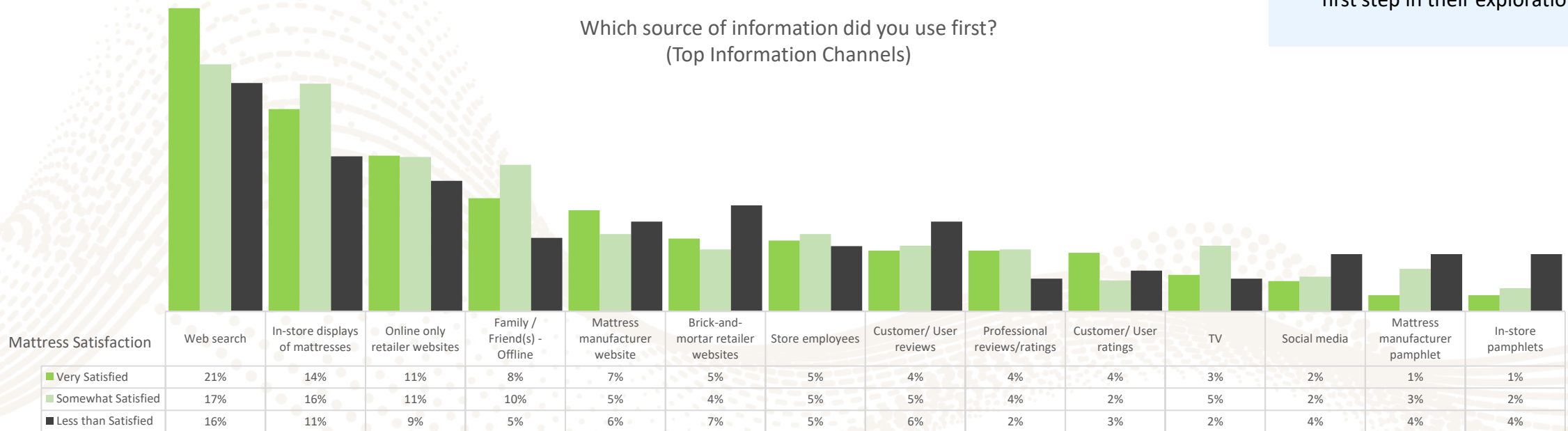
- Those most satisfied with their new mattress utilize an average of nearly 4 information sources during their exploration, significantly more than those who were less than satisfied, who utilized an average of nearly 3 information sources during their exploration.
- Those very satisfied with their new mattress are most likely to utilize in-store displays, web searches and customer reviews.
- Those less than satisfied with their new mattress are most likely to use web searches, in-store displays and store employees.

QC6 Base: Recent Purchasers and Explored/Compared/Considered (Very Satisfied N=714, Somewhat Satisfied N=374, Less than Satisfied N=177)

Exploration: First Step

Very satisfied purchasers and those less satisfied are both most likely to first utilize web searches as their first step in their exploration.

Which source of information did you use first?
(Top Information Channels)

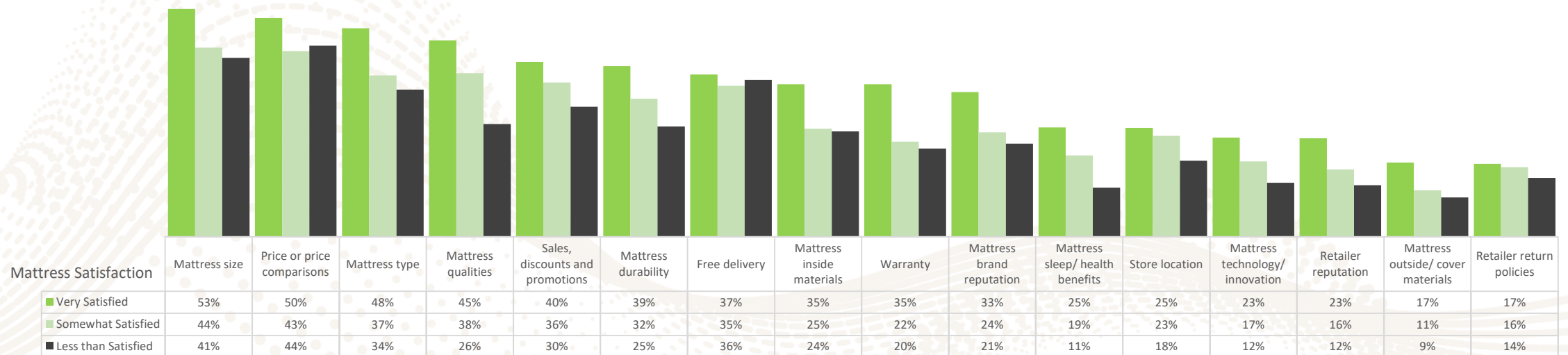


QC8 Base: Recent Purchasers and Explored/Compared/Considered (Very Satisfied N=714, Somewhat Satisfied N=374, Less than Satisfied N=177)

Exploration: Information Sought

- On average, those very satisfied with their new mattress seek more types of information during the exploration phase (7 vs. 5 types).
- Very satisfied purchasers most often seek information on mattress size, price, type, and qualities.
- Less satisfied purchasers most often seek information about price, mattress size, and free delivery.

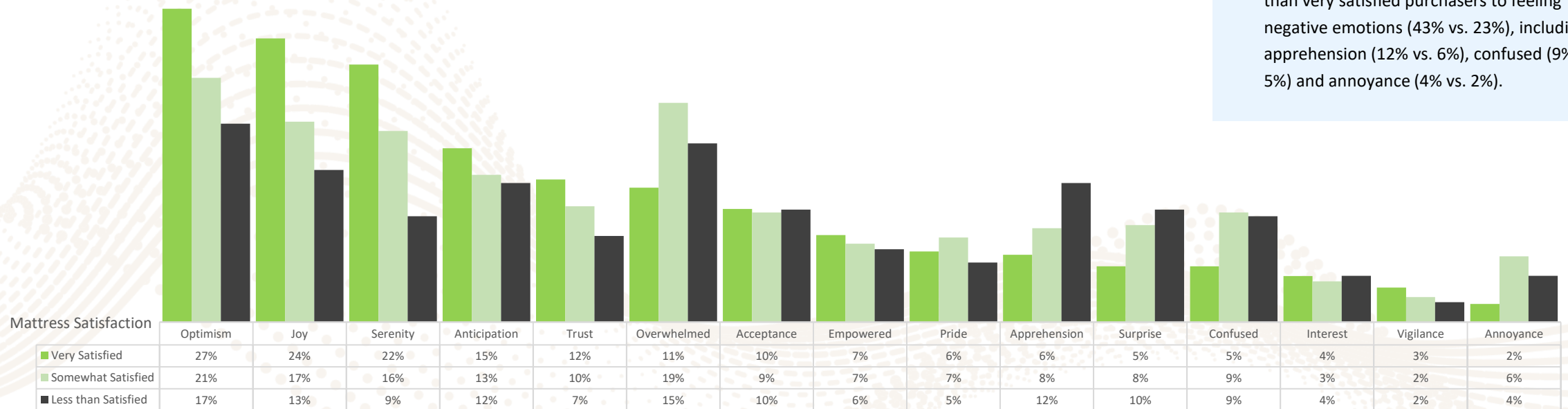
Information looked for or used when exploring mattresses
(Top types of information)



QC10 Base: Recent Purchasers and Explored/Compared/Considered (Very Satisfied N=714, Somewhat Satisfied N=374, Less than Satisfied N=177)

Exploration Emotions

What emotions were you experiencing when you were exploring options for your mattress purchase?
(Top Emotions)



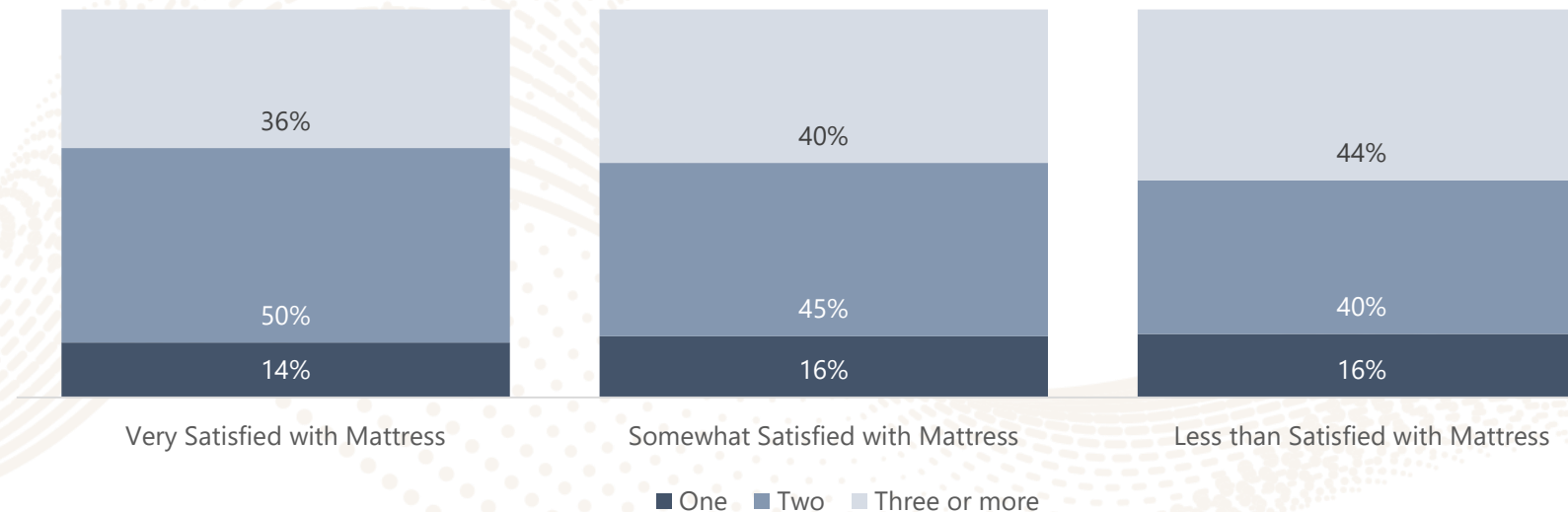
During exploration...

- Very satisfied purchasers are more likely than less than satisfied purchasers to experience positive emotions (78% vs. 59%), including optimism (27% vs. 17%), joy (24% vs. 13%) and serenity (22% vs. 9%).
- Less than satisfied purchasers are more likely than very satisfied purchasers to feeling negative emotions (43% vs. 23%), including apprehension (12% vs. 6%), confused (9% vs. 5%) and annoyance (4% vs. 2%).

QC12 Base: Recent Purchasers and Explored/Compared/Considered (Very Satisfied N=714, Somewhat Satisfied N=374, Less than Satisfied N=177)

Half of those very satisfied with their purchased seriously considered only two mattresses; those less satisfied with their mattress are more likely to consider three or more

How many different mattresses did you seriously consider before selecting the mattress that you purchased?

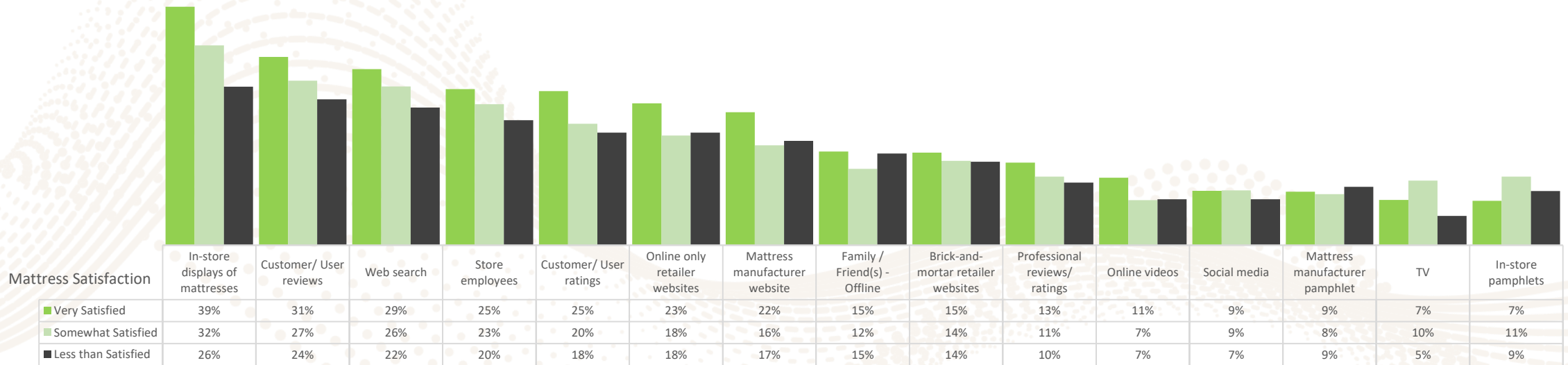


QD4 Base: Recent Purchasers and Explored/Compared/Considered (Very Satisfied N=714, Somewhat Satisfied N=374, Less than Satisfied N=177)

Evaluation/Comparison: Information Channels

- Those most satisfied with their new mattress and seriously considered at least two mattresses utilize more information channels (3.2 average) during their comparison/evaluation stage than those who are less than satisfied (2.6 average).
- Those most satisfied with their new mattress are significantly more likely to utilize in-store displays than those who are less than satisfied with their new mattress.

What sources of information did you use when you were evaluating and comparing options among the mattresses that you were seriously considering?

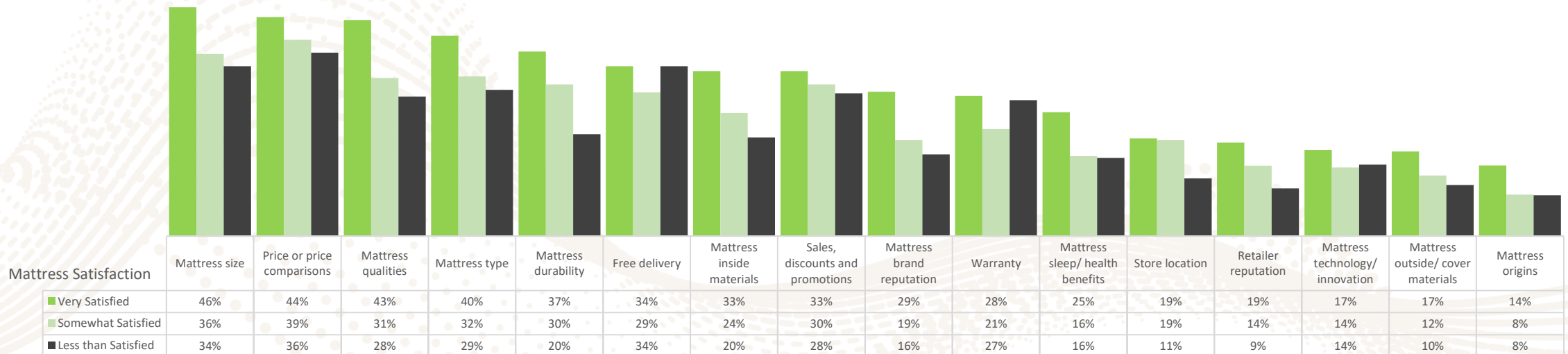


QD5 Base: Recent Purchasers and Seriously Considered Two+ Mattresses (Very Satisfied N=613, Somewhat Satisfied N=315, Less than Satisfied N=148)

Evaluation/Comparison: Information Sought

- Those very satisfied with their new mattress most frequently seek information on mattress size, price, qualities, type, and durability.
- Those less than satisfied with their new mattress most frequently seek information on price, free delivery, mattress size, and mattress qualities.

Information looked for or used when evaluating and comparing options
(Top Types of Information)



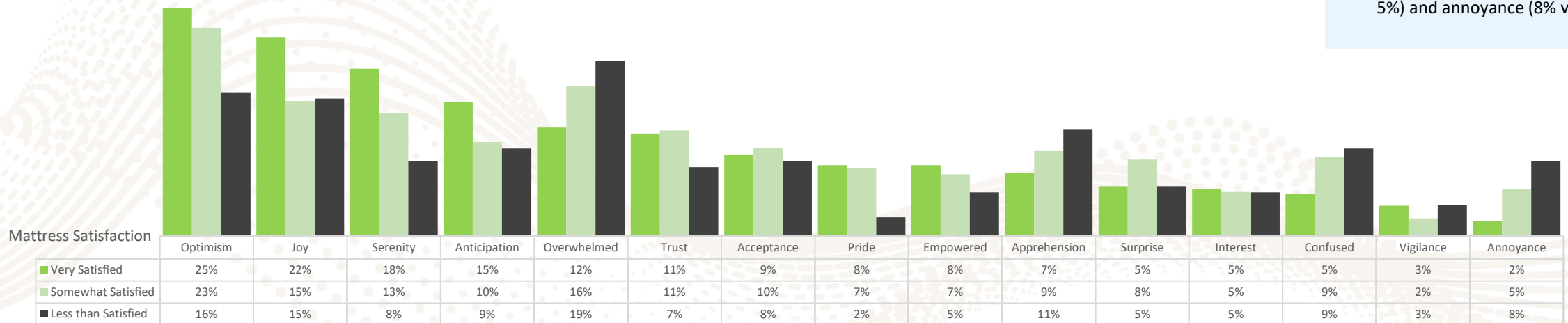
QD6 Base: Recent Purchasers and Seriously Considered Two+ Mattresses (Very Satisfied N=613, Somewhat Satisfied N=315, Less than Satisfied N=148)

Evaluation/Comparison: Emotions

During evaluation and comparison...

- Very satisfied purchasers are more likely than less than satisfied purchasers to experience positive emotions (77% vs. 56%), including optimism (25% vs. 16%), joy (22% vs. 15%) and serenity (18% vs. 8%).
- Less than satisfied purchasers are more likely than very satisfied purchasers to feeling negative emotions (50% vs. 24%), including overwhelmed (19% vs. 12%), confused (9% vs. 5%) and annoyance (8% vs. 2%).

What emotions were you experiencing when you were evaluating and comparing options among these mattresses?
(Top Emotions)



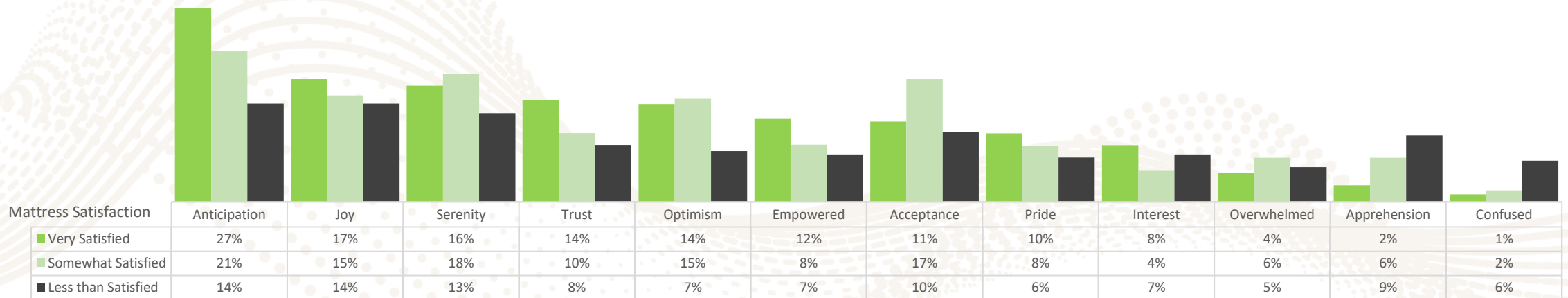
QD7 Base: Recent Purchasers and Seriously Considered Two+ Mattresses (Very Satisfied N=613, Somewhat Satisfied N=315, Less than Satisfied N=148)

Purchase: Emotions

At the time of their selection decision...

- Very satisfied purchasers are more likely than less than satisfied purchasers to experience positive emotions (83% vs. 59%), including anticipation (27% vs. 14%), trust (14% vs. 8%), and optimism (14% vs. 7%).
- Less than satisfied purchasers are more likely than very satisfied purchasers to feeling negative emotions (33% vs. 9%), including apprehension (9% vs. 2%) and confused (6% vs. 1%).

Now, think about when you made the decision to purchase the mattress that you selected. How did you feel during that time?
(Top Emotions)

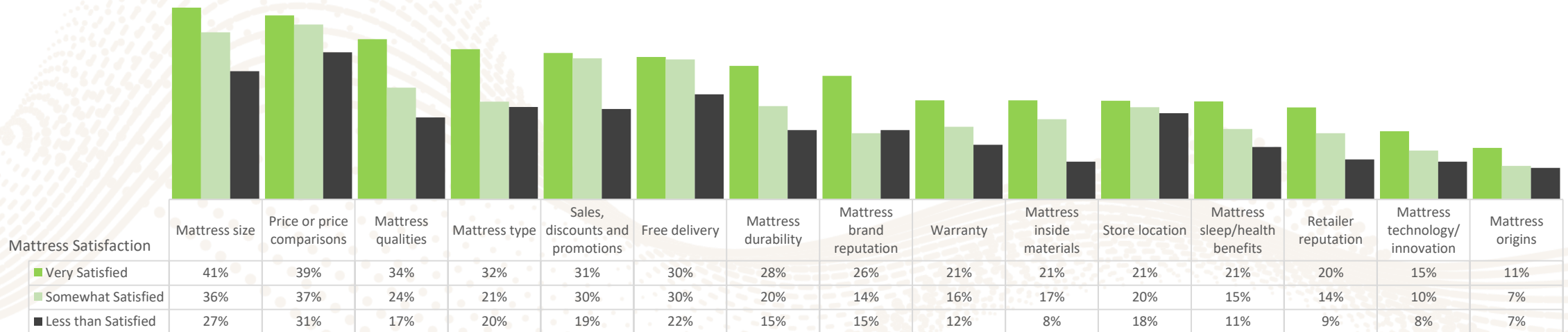


QE1 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Purchase: Selection Criteria

- Those very satisfied with their new mattress specify a variety of selection criteria, especially mattress size, price, qualities, type, sales, free delivery, durability, and mattress brand reputation.
- Those less than satisfied with their new mattress mentioned fewer reasons for selection, but most frequently make their mattress purchase based on price, mattress size and free delivery.

Why did you purchase this mattress?
(Top Reasons)



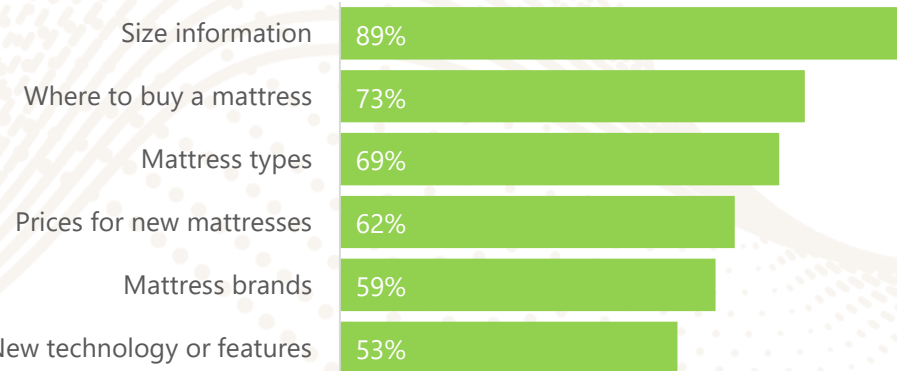
QE3 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Knowledge at Purchase Stage

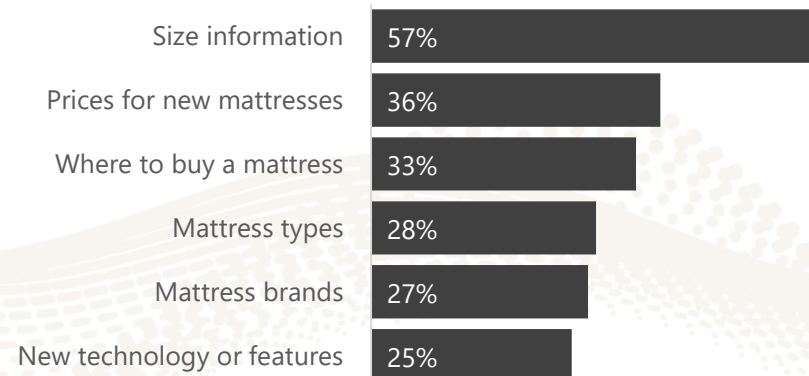
At the end of the purchase journey, those very satisfied with their new mattress considered themselves significantly more knowledgeable about all aspects of mattresses compared to those who were less than satisfied with their new mattress.

At the time you purchased your mattress, how knowledgeable did you feel about each of the following?
% Extremely/ Very Knowledgeable

Very Satisfied with Mattress



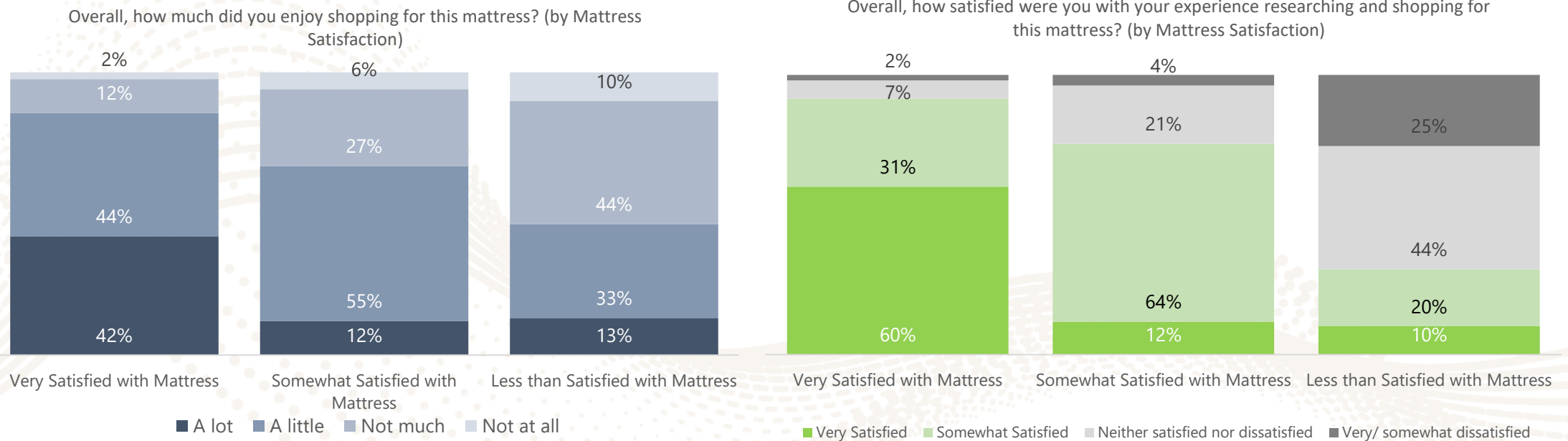
Less than Satisfied with Mattress



QE1A Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Shopping Enjoyment and Satisfaction

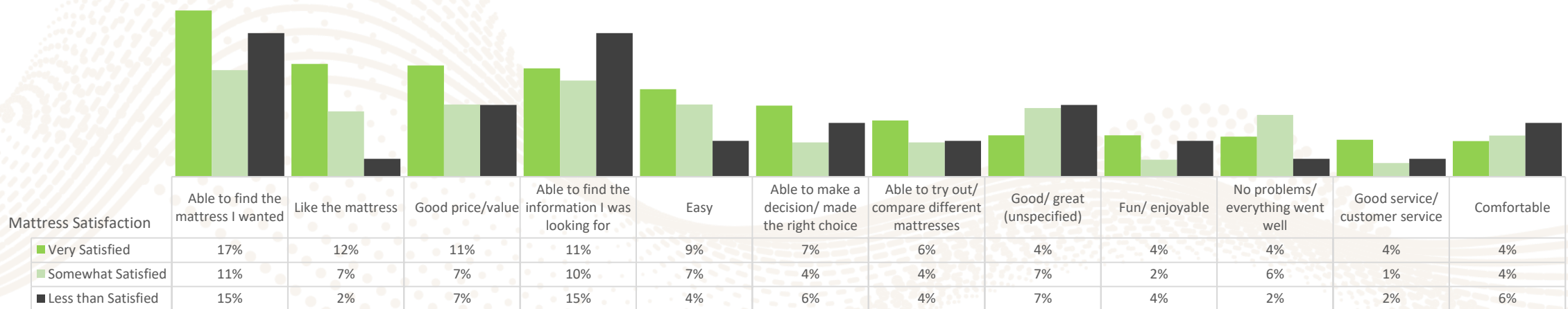
Those very satisfied with their mattress are more likely to have enjoyed shopping for their purchase compared to those who are less than satisfied with their mattress.



QD8 and D9 Base: Recent Purchasers and Explored/Compared/Considered (Very Satisfied N=714, Somewhat Satisfied N=374, Less than Satisfied N=177)

Purchase Journey: Reasons for Shopping Satisfaction

- Those who are very satisfied with their mattress purchase are more likely than others to say they were satisfied with their shopping experience because they like their mattress (12% vs. 7% vs. 2%).



QD10 Base: Recent Purchasers and Satisfied with Shopping Experience (Very Satisfied N=653, Somewhat Satisfied N=282, Less than Satisfied N=54)

Purchase Journey: Reasons for Shopping Satisfaction



Very/Somewhat Satisfied because...

"Had a wide variety of brands to look at the store displays, and employees were great to work with, and the information online was easy to find and sort through and compare"

"I got satisfaction from knowing I was doing my homework in order to get the best mattress for the best price possible."

"Store that I purchased mattress had great employees. Gave me several options to try. Didn't push. Let me come back several times to retry mattresses. Quick delivery once decision was made."

QD10 Base: Satisfied with shopping experience (N=989)

QD11 Base: Dissatisfied with shopping experience (N=73)



Very/Somewhat Dissatisfied because...

"It took a long time to find a mattress with all the criteria I was looking for."

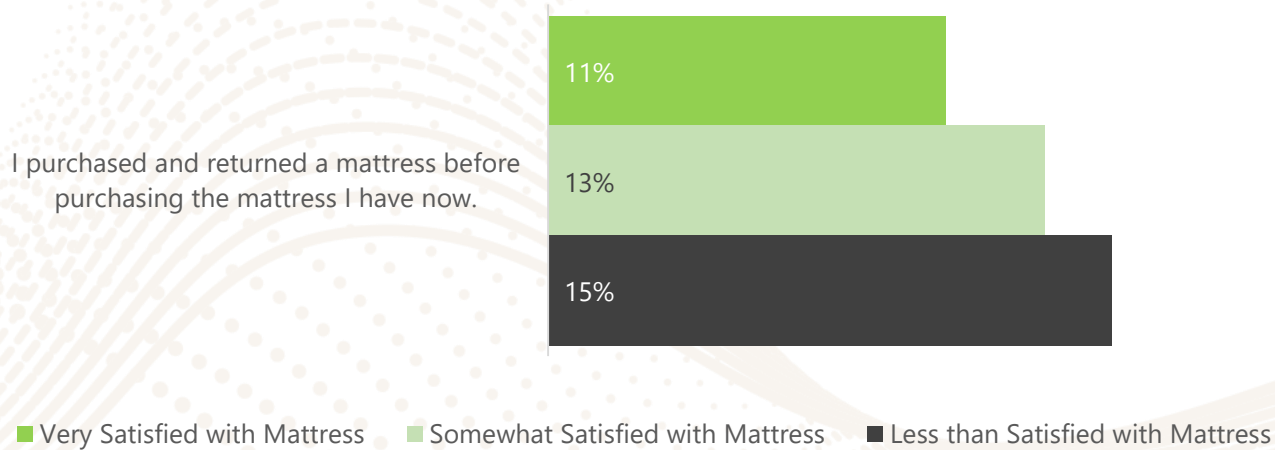
"Too many high-pressure salesmen. Not enough personal care from salespeople. Felt like shopping in a stereotypical used car lot with the salesman breathing down my neck to buy anything just to get my money."

"Advertised prices never included all of the extra's, which came close to doubling the cost. Mattress size turned out to be slightly irregular - retailer never revealed this, so sheets don't fit well. Delivery was not done well - lots of wall and door dings in that process. Lastly, the free pillows were pretty much worthless."

"It was all very confusing and it turned out we made the wrong choice! And hate the mattress we have and couldn't return it. We're stuck with it"

Purchase Journey: Returns/Exchanges

Satisfaction not related to having returned a mattress during the journey



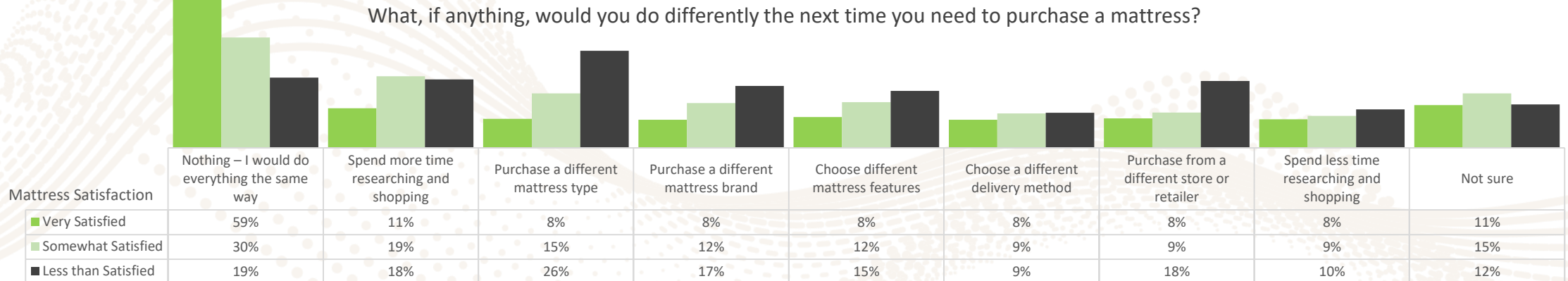
Among those whose mattress was purchased within the last 3 months, those who are very satisfied with their mattress are more likely than those who are less than satisfied to say they are not likely to return their mattress (75% vs. 51%).

QB12 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Purchase Journey: Lessons Learned

- 6 in 10 of those very satisfied with their new mattress said they would make their next mattress purchase the same way as this one.
- Just 2 in 10 of those less than satisfied with their new mattress said they would make their next mattress purchase the same way. One-quarter would purchase a different mattress type.

- 29% of those less than satisfied with their mattress expect to keep it less than 5 years (vs. 18% of those very satisfied).
- In contrast, 34% of those very satisfied with their mattress expect to keep it 10+ years (vs. 18% of those less than satisfied).

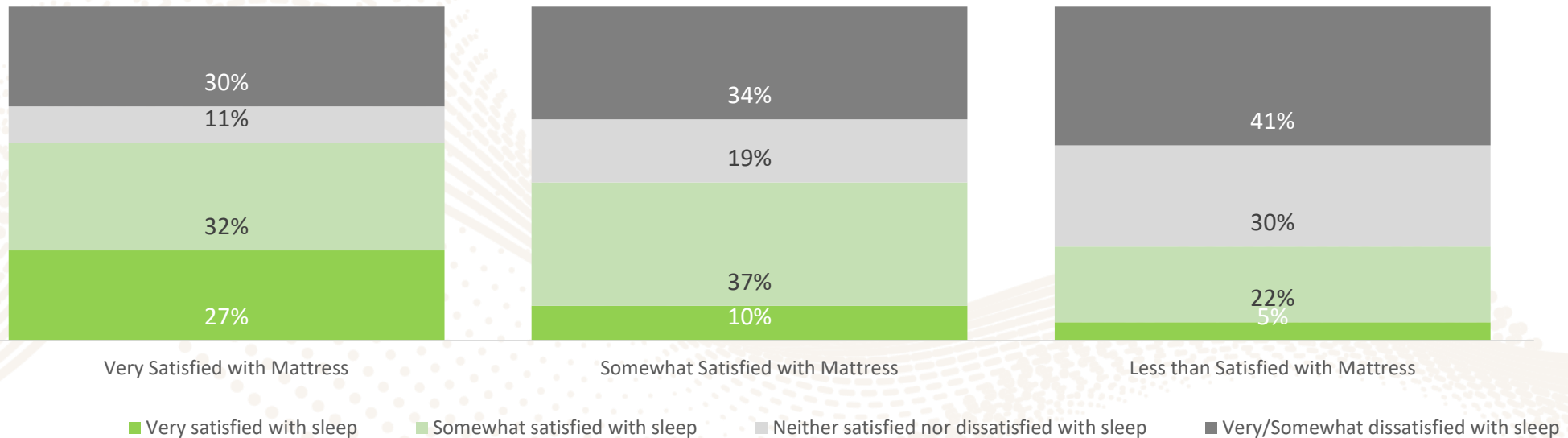


QE11 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Purchase Journey: Sleep Satisfaction

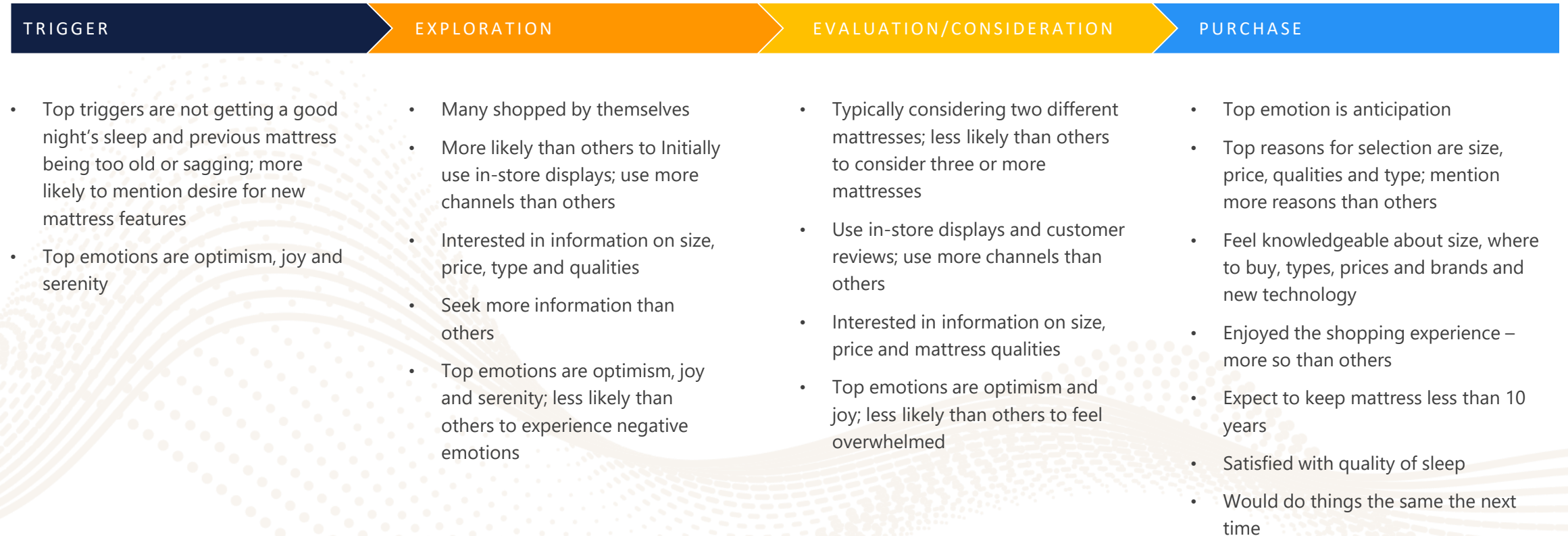
Those very satisfied with their mattress purchase are also most likely to be satisfied with the quality of their sleep.

In general, how satisfied are you with the quality of your sleep?



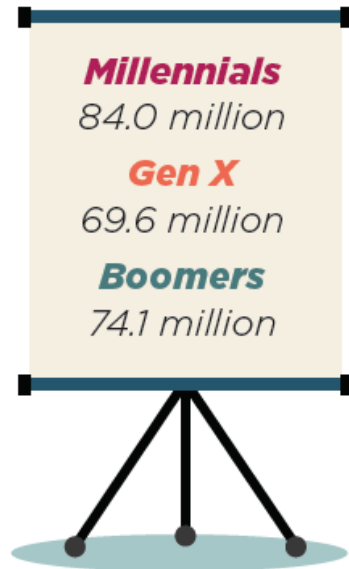
QA4 Base: Recent Purchasers (Very Satisfied N=846, Somewhat Satisfied N=432, Less than Satisfied N=223)

Recap: The Very Satisfied Mattress Purchaser's Journey



Why Map the Millennial Buyer Journey?

They're the largest generation ever



They've started buying mattresses: 24-39 years old



While they tend to spend less on each individual mattress purchase, they spend more money on sleep than older people

- Replace mattress more often (**every 5.3 years vs. Boomers 10.7 years**)
- More likely to buy **bedding accessories** along with their mattress

74% of Millennials buy bedding accessories along with a new mattress vs. **54%** of Boomers

And they are significantly more likely to buy sleep technology (**49%** vs. **12%** Boomers)

They need help shopping

Half of **Millennial buyers** are very satisfied with their new mattress (49%) compared to 65% of **Boomers**

20% of Millennials return their new mattress vs. **6%** of Boomers

7 in 10 Millennials say they'd shop differently for a mattress next time vs. **4 in 10 Boomers**

Reasons for the journey

Life change (e.g., new house, home improvement project, marriage/divorce)



Issues with their mattress (e.g., too old, poor sleep, sagging)

Desire for a different mattress (e.g., size, technology)

What do you need to know about them?

They view sleep as one of the top factors in their health and well-being, ahead of diet and exercise.

Which of the following factors do you believe are the **most important** for your **health and well-being**?



They are more likely to be **poor than excellent sleepers**. And they are **more sleep-deprived than Boomers**.

39% of **Millennials** feel they do not get enough sleep vs. **34%** of **Boomers**

SOURCE: State of America's Sleep 2019, Better Sleep Council.

What they know/don't know

know about

Size of mattress they want

Budget they want to spend

If they'll purchase online or at brick-and-mortar **location**

Type of mattress they want (e.g., spring, foam)

don't know as much about

Features they want (e.g., motion isolation, adjustable support, temperature control)

Specific store or **retailer** they'll purchase from



Insights and tips:

Consistent advertising can help get you in their small consideration set

Connect to what's important to them: Health benefits of a good night's sleep • Health benefits of a new mattress • Changing a mattress when moving into a new home • How a smart mattress or technology can help them get better sleep

What they are feeling

optimism **joy**
anticipation



Journey length

31% **less than a week**
48% **1-4 weeks**
19% **1 month or more**

What they're not thinking of enough compared to very satisfied buyers

- ✓ Health benefits of sleep and mattress
- ✓ Warranty
- ✓ In-store displays

What they want to learn about a mattress

Qualities
(e.g., comfort, firmness, odorless, stainless, temperature control)

Type (e.g., spring, foam)



Sales, discounts, promotions

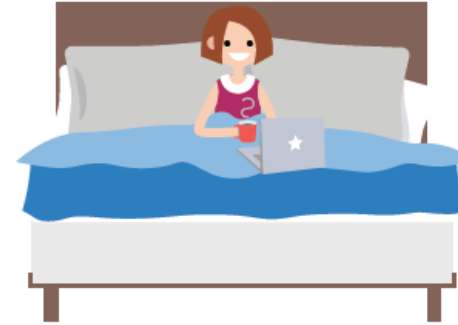
Price

Size

of mattresses considered:

65% consider one or two mattresses

Where they look for information



- Web search
- Customer reviews and ratings
- In-store displays
- Mattress manufacturer website
- Family and friends offline
- Online-only retailer websites

Millennials use 3 touchpoints on average when exploring mattresses (very satisfied buyers use 4).

Millennials are less likely to use in-store displays than very satisfied buyers.

What they are feeling

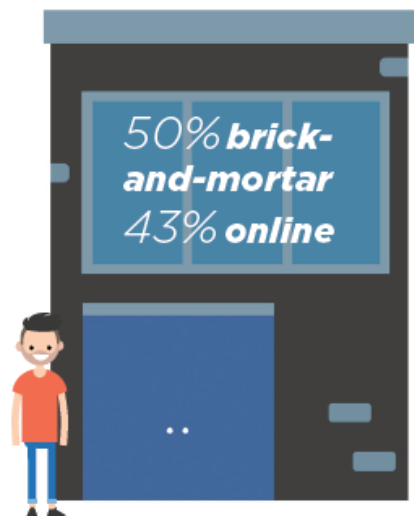
optimism **serenity/joy**
anticipation



Insights and tips:

Help shoppers develop a personalized want list when they shop • Amp up the in-store experience, personalize it and align it with digital to create an omnichannel experience for shoppers • Don't be surprised if they don't buy on their first visit - give them reasons to come back • Too many choices make it hard to choose - find ways to simplify their decisions • Tell a sustainability story if you have one

Where they buy



What they are more likely to be interested in buying than others

- ✓ 1. Pillow top
- ✓ 2. Foam mattress
- ✓ 3. King or California King mattress

What they buy with their mattress

7 in 10 Millennials buy bedding accessories along with a new mattress:

- 34%** sheets
- 36%** pillows
- 23%** comforters or duvets
- 27%** mattress protectors
- 21%** mattress pads
- 20%** bed covers and decorative pillows
- 19%** mattress toppers
- 66%** mattress foundations



Half of Millennials use sleep technology including tracking devices, such as:

- Apple Watch®**, **Fitbit** **28%** **sleep tracking app** **23%**
- mattress-connected sleep tracker** **19%**

What they are likely to base their selection on



What their preferred delivery method is



What they are feeling

serenity **trust**
anticipation



Insights and tips:

Consider selling accessories or bundling mattress with accessories to increase the shopping basket

Again – make it personalized and simplify their choices

Make pickup or delivery easy and painless

Millennial Buyer Journey

PHASE 1. TRIGGER

Reasons for the journey

Life change (e.g., new house, home improvement project, marriage/divorce)

Issues with their mattress (e.g., too old, poor sleep, sagging)

What do you need to know about them? They view sleep as one of the top factors in their health and well-being, ahead of diet and exercise.



Health

Desire for a different mattress (e.g., size, technology)

Retail sale/advertising



Which of the following factors do you believe are the **most important** for your health and well-being?

They are more likely to be **poor** than excellent sleepers. And they are more sleep-deprived than Boomers.

39% of **Millennials** feel they do not get enough sleep vs. 34% of **Boomers**

SOURCE: State of America's Sleep 2019, Better Sleep Council.

What they know/don't know

know about

Size of mattress they want
Budget they want to spend

If they'll purchase online or at brick-and-mortar **location**

Type of mattress they want (e.g., spring, foam)

don't know as much about

Features they want (e.g., motion isolation, adjustable support, temperature control)

Specific store or **retailer** they'll purchase from

What they are feeling

optimism
anticipation
Joy



Insights and tips:

Consistent advertising can help get you in their small consideration set

Connect to what's important to them: Health benefits of a good night's sleep • Health benefits of a new mattress • Changing a mattress when moving into a new home • How a smart mattress or technology can help them get better sleep

PHASE 2. EXPLORATION/EVALUATION

Journey length

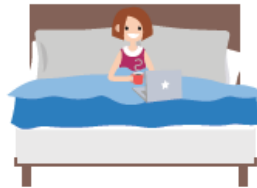
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What they're not thinking of enough compared to very satisfied buyers

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Where they look for information

- Web search
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- Mattress manufacturer website
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What they are feeling

anticipation
optimism
serenity/joy

Insights and tips:

Help shoppers develop a personalized want list when they shop • Amp up the in-store experience, personalize it and align it with digital to create an omnichannel experience for shoppers • Don't be surprised if they don't buy on their first visit – give them reasons to come back • Too many choices make it hard to choose – find ways to simplify their decisions • Tell a sustainability story if you have one

What they want to learn about a mattress

Qualities (e.g., comfort, firmness, odorless, stainless, temperature control)

Type (e.g., spring, foam)

Sales, discounts, promotions

Size

Price

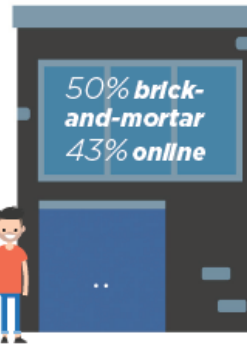


of mattresses considered:
65% consider one or two mattresses

Millennials use 3 touchpoints on average when exploring mattresses (very satisfied buyers use 4). Millennials are less likely to use in-store displays than very satisfied buyers.

PHASE 3. SELECTION/PURCHASE

Where they buy



What they buy with their mattress

7 in 10 Millennials use bedding accessories along with a new mattress:

- 34% sheets
- 36% pillows
- 23% comforters or duvets
- 27% mattress protectors
- 21% mattress pads
- 20% bed covers and decorative pillows
- 19% mattress toppers
- 66% mattress foundations



Half of Millennials buy sleep technology including tracking devices, such as:

- Apple Watch[®], Fitbit 28% sleep tracking app 23%
- mattress-connected sleep tracker 19%

Insights and tips:

Use cross-selling and bundling to increase the shopping basket
Again – make it personalized and simplify their choices
Make pickup or delivery easy and painless

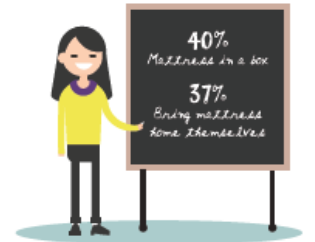
What they are more likely to be interested in buying than others

- ✓ Pillow top
- ✓ Foam mattress
- ✓ King or California King mattress

What they are likely to base their selection on

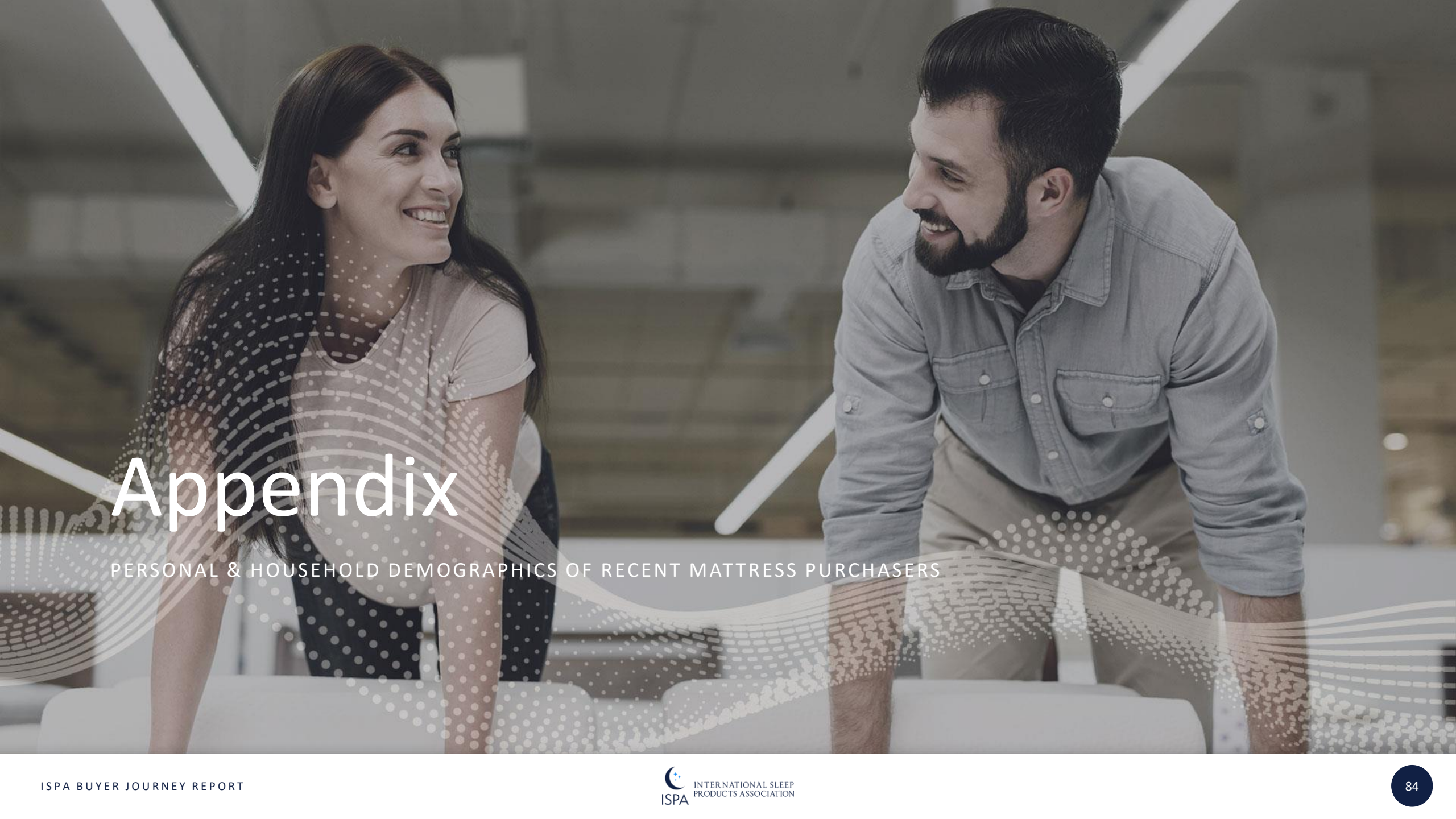
- Free delivery
- Size
- Qualities (e.g., comfort, firmness, odorless, stainless, temperature control)
- Price
- Sales, discounts, promotions

What their preferred delivery method is



What they are feeling

anticipation
trust
serenity



Appendix

PERSONAL & HOUSEHOLD DEMOGRAPHICS OF RECENT MATTRESS PURCHASERS

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	(N=1501)	Millennials (N=602)	GenX (N=426)	Boomers (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Age							
18-39	40%	100%	-	-	35%	46%	49%
40-54	28%	-	100%		29%	29%	26%
55+	32%	-	-	100%	36%	25%	26%
Gender							
Male	38%	34%	40%	42%	37%	40%	41%
Female	62%	66%	59%	58%	63%	60%	59%
Other	<1%	<1%	<1%	0%	<1%	0%	0%

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	(N=1501)	Millennials (N=602)	GenX (N=426)	Boomers (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Region							
Northeast	17%	15%	18%	19%	17%	18%	15%
South	39%	42%	40%	35%	40%	36%	42%
Midwest	21%	20%	19%	25%	21%	21%	22%
West	23%	24%	23%	21%	22%	25%	22%
Metro Status							
Urban	32%	40%	34%	21%	33%	32%	27%
Suburban	48%	43%	46%	56%	46%	49%	52%
Rural	20%	17%	20%	23%	21%	19%	20%

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	(N=1501)	Millennials (N=602)	GenX (N=426)	Boomers (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Race/Ethnicity							
White (Non-Hispanic)	59%	47%	59%	74%	61%	59%	52%
Black or African-American	15%	18%	15%	11%	17%	10%	16%
Hispanic	17%	24%	15%	9%	15%	17%	23%
Asian or Pacific Islander	6%	7%	8%	3%	4%	10%	5%
Native American or Alaskan Native	1%	1%	1%	1%	1%	1%	1%
Mixed Race	2%	2%	1%	1%	2%	1%	1%
Other	1%	<1%	1%	1%	1%	1%	2%

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	(N=1501)	Millennials /Gen Z (N=602)	GenX (N=426)	Boomers/ Greatest Generation (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Household Income							
Less than \$50,000	44%	51%	39%	39%	45%	36%	54%
\$50,000 - \$99,000	32%	33%	32%	31%	32%	35%	27%
\$100,000+	22%	16%	27%	24%	21%	26%	16%
Education							
Less than High School	3%	3%	4%	1%	3%	1%	6%
High School graduate	19%	23%	16%	16%	20%	15%	23%
Technical or Vocational school	5%	5%	5%	4%	4%	5%	9%
Some college	24%	25%	21%	27%	25%	22%	25%
College graduate	33%	32%	36%	31%	33%	39%	24%
Post-graduate education	16%	12%	18%	21%	16%	19%	13%

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	(N=1501)	Millennials (N=602)	GenX (N=426)	Boomers (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Marital Status							
Married	53%	48%	55%	58%	54%	53%	48%
Single	25%	37%	22%	12%	23%	28%	25%
Divorced	10%	2%	12%	16%	11%	7%	10%
Separated	1%	1%	1%	1%	1%	0%	1%
Widowed	3%	1%	2%	8%	3%	3%	4%
Live with significant other	8%	12%	8%	5%	7%	9%	13%
Children under 18 in HH							
0	58%	37%	53%	88%	60%	57%	52%
1 or more	42%	63%	47%	88%	40%	43%	48%

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	(N=1501)	Millennials (N=602)	GenX (N=426)	Boomers (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Employment							
Employed Full-Time	48%	57%	60%	25%	46%	54%	42%
Employed Part-Time	11%	13%	9%	10%	10%	12%	12%
Unemployed, looking for work	4%	5%	5%	3%	5%	2%	5%
Home-maker	14%	19%	15%	5%	13%	13%	18%
Retired	21%	1%	9%	57%	24%	16%	21%
Student	2%	4%	1%	0%	2%	3%	2%

Demographic Profile

	TOTAL	GENERATION			MATTRESS SATISFACTION		
	Total (N=1501)	Millennials (N=602)	GenX (N=426)	Boomers (N=473)	Very Satisfied with Mattress (N=846)	Somewhat Satisfied with Mattress (N=432)	Less than Satisfied with Mattress (N=223)
Frequency of using social networks							
Multiple times a day	51%	66%	50%	34%	55%	48%	43%
Once a day	17%	13%	18%	21%	16%	18%	18%
Less than once a day	19%	15%	21%	22%	16%	21%	24%
Smartphone Usage							
Yes, own a smartphone and use apps	85%	93%	90%	71%	86%	88%	78%
Yes, own a smartphone but do not use apps	8%	5%	6%	14%	7%	9%	11%
No, do not own a smartphone	6%	1%	4%	13%	6%	3%	10%



Once Upon a Bedtime

About Us

Nearly 40 years and many restless nights ago, a group of like-minded folks wanted to educate the world about the critical relationships between sleep, good health and quality of life. This wise group knew the humble mattress was overlooked and it wasn't getting the attention it deserved. There had to be a better way. With an unbiased voice, the Better Sleep Council was formed bedding leaders and sleep experts who represent a cross-section of the sleep products industry, with the noble goal of helping people start every day with a good night's rest.

More on the Better Sleep Council

Established in 1978, the Better Sleep Council (BSC) is the consumer-education arm of the International Sleep Products Association devoted to educating the public about the critical relationship between sleep, good health and quality of life, as well as the value of the mattress and sleep environment in the pursuit of a good night's sleep. With an unbiased voice, the BSC is comprised of bedding leaders and sleep experts who represent a cross-section of the mattress industry.

[BETTERSLEEP.ORG](https://www.bettersleep.org)

About ISPA

ISPA was founded to help sleep product manufacturers and suppliers reach their full potential. We work hard every day on behalf of the diverse ISPA members around the world to unite voices and create a stronger mattress industry.

ISPA's Mission

Lead and advance the interests of
the sleep products industry.



ISPA's Vision

Help the world sleep better.

Setting Our Sights on **the Future**



Data & Knowledge

ISPA will provide intelligence essential to industry success



The Consumer

ISPA will enhance the industry's understanding and responsiveness to consumer trends and needs



Advocacy

ISPA will proactively shape legislation and regulations affecting the industry



Inclusion

ISPA will be the home for collaborative industry interaction



Organizational Health

ISPA will have sufficient revenue, industry support and management resources to meet our goals

ABOUT FLUENT

Fluent is a data and insights-driven strategic consulting firm. We leverage understanding of human behavior to help the world's best known brands and organizations advance worthy causes, innovate transformational products, and successfully navigate change.

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