

Sleep Savvy

the magazine for sleep products professionals

Exclusive BSC consumer research

STUDY REVEALS
CHANGING CONSUMER
MATTRESS-SHOPPING
HABITS AND
PREFERENCES

SPOILER ALERT:

MATTRESS
REPLACEMENT CYCLE
DOWN, EXPECTATION
OF PRICE UP

THE Better
Sleep
COUNCIL 

GOOD NEWS, RETAILERS: Survey finds consumers adopting savvier shopping habits

A 2016 study from the Better Sleep Council reveals changes in bedding-shopping behavior, including shorter replacement cycles, an expectation of higher ticket prices, a commitment to brick-and-mortar stores but an interest in online outlets and more

BY JULIE A. PALM



Graphs and quotations courtesy
of Fluent Research

Shh. Hear that? It's the sound of a seemingly impenetrable barrier finally being breached. For the first time, consumers' expectations for how long a mattress should last have dropped below 10 years.

That barrier has held firm since before the Better Sleep Council started doing major consumer research in 1996, but, according to the latest BSC research, today's consumers now expect to keep a new mattress, on average, for 9.4 years. It's a significant drop of about 1½ years from the 10.9 years cited by consumers the last time such research was conducted in 2007. (The BSC is the consumer-education arm of the International Sleep Products Association.)

Key Tracking Indicators

Comparison of 2016 and 2007 data



Consumers expect to replace their mattresses more often and pay more for them in 2016 than in 2007.

A shorter mattress replacement cycle means consumers can take better advantage of new component technologies and advancements in construction techniques—and benefit by enjoying mattresses that offer different levels of comfort and support as their bodies change and age. It’s also nice for the mattress industry, which can introduce innovations to consumers more rapidly, and for retailers, who enjoy more frequent visits from shoppers.

And there’s more good news for retailers in the latest round of research. The survey conducted in 2016 found that consumers expect their new mattress to cost more, \$1,110, on average they say—a significantly higher price point than consumers have cited in past surveys.

“Since the last wave of research was done in 2007, significant economic, technological and societal trends have redefined the way we shop and relate to brands,” writes New York-based Fluent Research, which conducted the research for the BSC, in a report accompanying the latest

results. “In the current study, we address how these trends—such as the emergence of millennials, the rise of social media and the technological advances in the mattress industry—have impacted consumers’ relationship to sleep and mattresses.” (Learn about the survey methodology on page 33.)

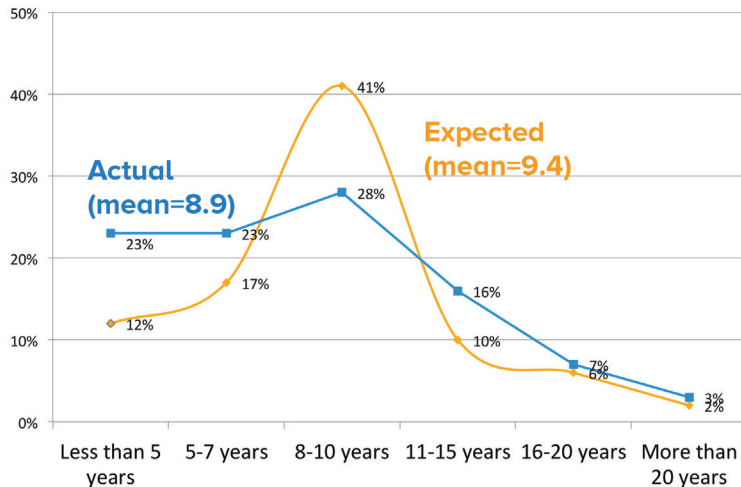
Here, we’ll delve more deeply into the findings about replacement cycles and price points and examine what the BSC study shows about how consumers research, shop for and, ultimately, make final decisions about a mattress purchase.

MORE TO COME

The latest consumer research from the Better Sleep Council, the consumer-education arm of the International Sleep Products Association, is a treasure trove of fascinating information retailers can use to improve their operations and better meet the needs of consumers. We’ll share more details in upcoming issues of *Sleep Savvy* and online at SleepSavvyMagazine.com so you can learn what triggers consumers to shop for a new mattress, what kinds of new products they are interested in learning more about, how they shop for accessories and more. Don’t miss these articles!

Mattress Replacement Cycle

Consumers replaced their last mattress sooner than they expect a mattress to last



"I read a mattress should be replaced approximately every 7 years. However I believe for the cost a well-made mattress should last 10 or more years. A mattress should be replaced when it begins to fail, i.e. no longer supports you, is sagging, or when you wake up sore from sleeping on it." - Doreen

Expected: How many years would you expect to keep a new quality mattress? (N=2000)

Actual: How many years did you have your previous mattress before you replaced it with the one you currently sleep on? (N=2000)

The replacement cycle speeds up

We start with the replacement cycle. According to the BSC research, not only have consumers' expectations for how long a mattress should last dropped, the actual mattress replacement cycle is compressing, too. In 2007, study respondents reported keeping their last mattress 10.3 years before replacing it with their current sleep set. Today, that time frame is down to a median of 8.9 years. In fact, nearly three-quarters of study respondents replaced their last mattress within 8.9 years—and only 10% reported keeping their bed set more than 16 years.

These changes in both expectations and actual replacement cycles come after efforts by manufacturers, retailers and the BSC to educate consumers about the advantages of replacing their old mattresses more frequently. And comments from survey respondents show the industry's message is getting through to people: They increasingly understand that the best indicator of when to replace a mattress is when it no longer offers a comfortable, restful night's sleep.

As a respondent identified as Doreen said, "One day, I mentioned to a friend I was waking up every day with a sore back. She asked how old my mattress was and when

I told her it was about 10 years old, she said that was my problem. It hadn't dawned on me till that moment that I needed a new mattress. I did research and found out my mattress was past its prime, so I bought a new one."

The BSC encourages consumers to evaluate the condition of their sleep set—and the quality of their own sleep—every five to seven years.

The research finds interesting generational differences when it comes to how consumers view replacing their sleep sets. Most notably, younger consumers (ages 18 to 35) both expect to replace and actually do replace their mattresses in more compressed cycles than their older peers, perhaps because they are experiencing life changes (marriages, first-home purchases, etc.) more rapidly than older consumers. Younger consumers, who replace smartphones and other electronics every couple of years, also may be more attuned to the need to upgrade consumer products frequently to enjoy the benefits of technological advancements. When asked, "How many years would you expect to keep a new quality mattress?" those 18 to 35 responded 6.6 years, on average. In contrast, those 36 to 55 expect to keep a new mattress 9.1 years and those 56 and older say they hope to get 11.6 years out of a new bed.

Mattress Replacement Cycle

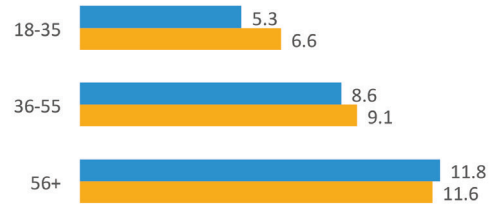
Expected and actual replacement cycle is correlated with age, gender, income and family status

Gender
 Female: 10.1/9.6
 Male: 8.6/8.0

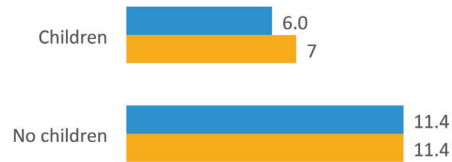
● expected
 ● actual



Income



Age



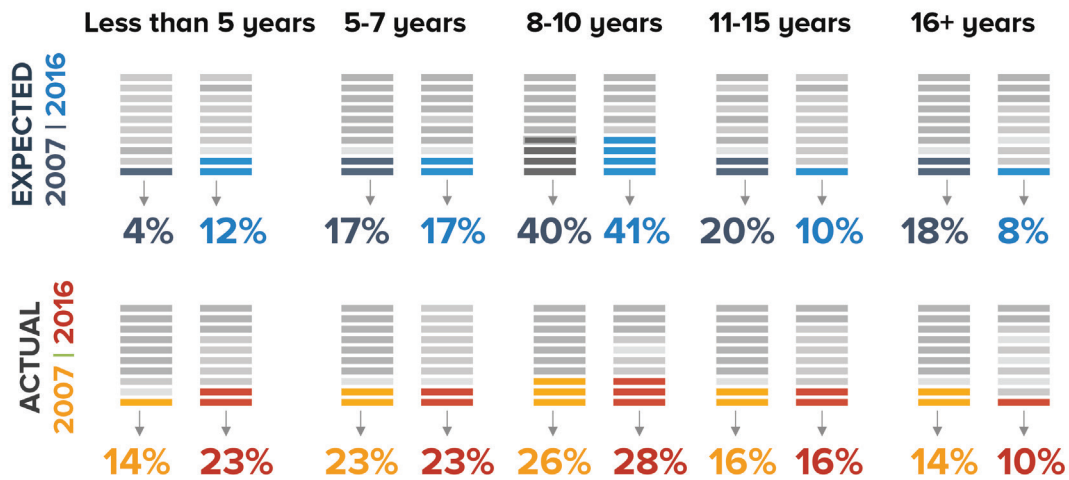
Family

Expected: How many years would you expect to keep a new quality mattress? (N=2000)

Actual: How many years did you have your previous mattress before you replaced it with the one you currently sleep on? (N=2000)

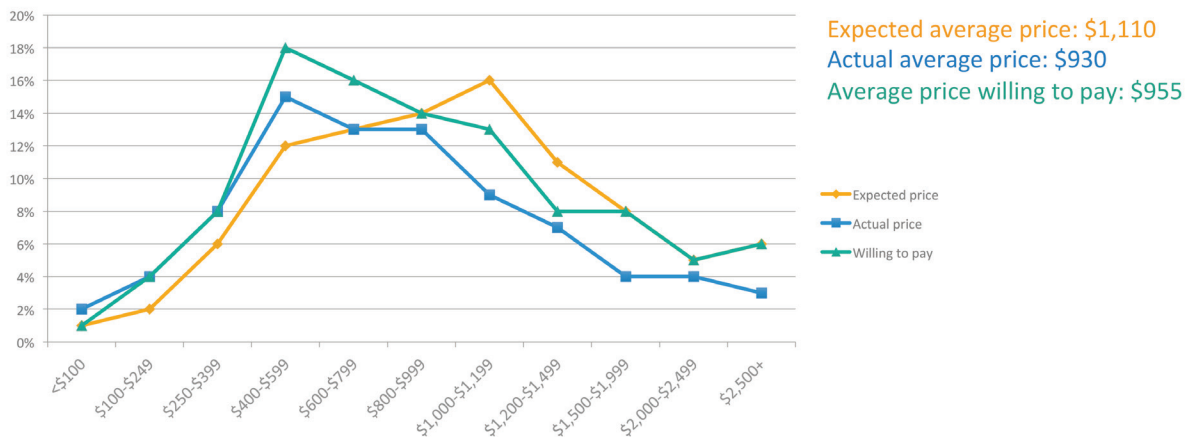
Replacement Cycle: Comparison with 2007

Consumers' expectations of and actual replacement cycle have shrunk since 2007: from 10.9 to 9.4 (expected) and from 10.3 to 8.9 (actual)



Expectations and Actual Spending on Mattresses

The amount of money consumers expected a queen-size mattress to cost, actual price paid for a queen-size mattress, and willingness to pay for their next mattress



Expected: In your opinion, how much does a new quality queen-size mattress or mattress set cost? (maximum value, N=2000)
Actual: How much did your current mattress cost? (among consumers who sleep on a queen-size mattress, maximum value, N=943)
Willing to pay: If you were shopping for a new mattress or mattress set for yourself today, what size would you buy and what is the maximum amount you would be willing to pay for it? (among consumers who plan to buy a queen-size mattress, N=638)

How much would you pay?

As we mentioned earlier, when consumers go to replace their mattress today, they are expecting to pay more than ever before. When asked in the 2016 survey, “In your opinion, how much does a new quality queen-size mattress or mattress set cost?” respondents said, on average, \$1,110—up \$181 over the \$929 price point cited in the 2007 survey. Interestingly, 2016 survey respondents reported actually paying \$930, on average, for their current queen-size mattress (or set) and said they’d be “willing to pay” \$955 if they “were shopping for a new mattress or mattress set” today.

Nearly half (49%) of consumers say that mattresses are fairly priced in terms of the value they provide, but another 43% say mattresses are too expensive, indicating the industry still has work to do in terms of conveying the benefits of a quality mattress. Here’s an idea about how to do that: When asked about mattress prices in a slightly different way—one that clearly ties mattresses to sleep—consumers seem to appreciate the value of a mattress more. Two-thirds of respondents said they agree with the statement: “When you consider how much time we spend sleeping, the cost of a high-quality mattress is reasonable.” Only 29% strongly disagreed.

In general, most consumers see a link between price and quality, with one in two agreeing with the statement, “In general, the more you pay for a mattress, the better the quality of the mattress.”

Comments from respondents show how they balance price concerns with other needs and desires. One respondent identified as Shelly put it this way: “Price has to play a role in my decision because I am on a budget. But I recognize that this is a purchase which is designed to last a long time so I try to plan in advance enough so that I don’t have to buy at rock-bottom prices and have some wiggle room to get the mattress I feel is the best for my husband and me.”

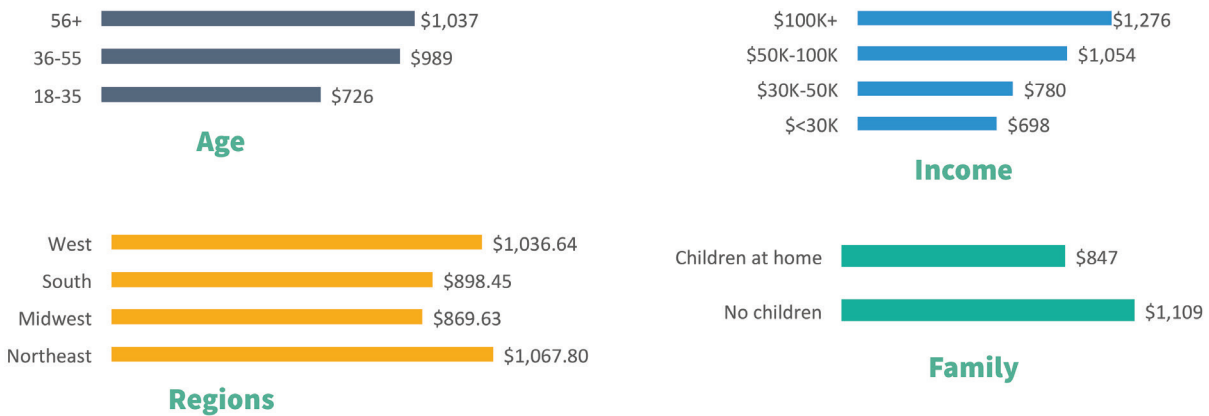
Blurred lines

It’s clear from the BSC research that the demarcation between “in-store” and “online” is increasingly fuzzy for consumers when it comes to both researching products and shopping for them. The clear takeaway for retailers: Consumers are ever-more comfortable bouncing back and forth between the two.

“Respondents rely on a range of information sources to research and shop for a new mattress,” Fluent Research writes in the report accompanying the survey results. “Some respondents start by extensively researching the mattress market, learning about different types, brands and construction materials, and then going back to a brick-and-mortar store to try out the models they like. Others start in their neighborhood stores, talk to salespeople, make their selection and then search for a better price online. Many people employ a combination of the two strategies.”

Average Price Willing to Pay: Demographic Variations

The price consumers are willing to pay for a queen-size mattress is correlated with **age, income, family status, and regions**



Willing to pay: If you were shopping for a new mattress or mattress set for yourself today, what size would you buy and what is the maximum amount you would be willing to pay for it? (Queen-size, N=638)

In Their Own Words

Consumers reflect on **price fairness of mattresses**

"Price has to play a role in my decision because I am on a budget. But I recognize that this is a purchase which is designed to last a long time so I try to plan in advance enough so that I don't have to buy at rock bottom prices and have some wiggle room to get the mattress I feel is the best for my husband and I." - Shelly

"For our family we really look at price, we have 3 small children and don't want to splurge on a mattress for us because we would rather splurge on something for them or put money away for a vacation. We would set a price limit but we would have done research before we went to the store so we should have an idea of what we will spend." - Erin

"I consider price, but it's probably not the most important factor. I'd rather splurge on a mattress that is a little bit more expensive if it will last me longer. I usually have a price in mind before shopping, but that may be swayed depending on what I find and what I like." - Rosanna

"Price is important, however as with most things in life you get what you pay for. The mattress industry is abusive in its pricing schemes as it is well known that mattresses do not sell at list price. The mark-ups are very large so there is room to heavily discount. This erodes customer trust. With that being said, when I find something that is really comfortable - as a mattress is such an important purchase - price is secondary." - David

Time Spent on Research

The majority of consumers make up their minds about purchasing a mattress **within two weeks**



"The first thing I would do when shopping for a mattress would be to search online for some articles about "mattress quality" and such. I would try to find some independent articles from a consumer reports or something similar. After learning a bit more I would narrow down 2 or 3 stores I would visit in-person and take a day to do that. Typically I would not make my decision on my first shopping day out. I would visit the stores and then try to look at all the factors after I went home, such as quality, prices, my "gut instinct" and think about it for a week or so before making a decision." - Shelly

Tracing today's researching and shopping process through the words of consumers themselves is illustrative.

"I first go online, checking out a mattress blog ... I read how they describe the beds and watch videos they had posted," explained one respondent. "A few times I emailed questions to the blogger. I also read (on the blog) comments from people who purchased different beds. If a brand sounds interesting, I go to YouTube and watch people trying out different brands. I also saw some other mattress videos on YouTube, like how to purchase, secrets of the industry, etc. Then I visit the manufacturer's website and look around there. If I have any questions, I email or call them. Then I search for reviews regarding specific mattresses that sound interesting. All during this process, I take notes and write out questions I have. Finally, I will visit some local stores to see what they can offer."

Another respondent also laid out a process that flits back and forth between brick-and-mortar stores and online resources: "First, I would shop around and research the different kinds, from firm to soft, coils or foam, hypoallergenic, gel, back support, policy on trial periods, if any, and price points. After deciding what options would be best for us, I would want to lie on them to feel the difference between them and feel which is the most comfortable. I would then take this information and do some online research to see the reviews before making our final decision."

Such comments point to the imperative for mattress

retailers to adopt a robust omnichannel business model, with both physical locations and a strong online presence—not only in terms of retailers' own information-packed, e-commerce-enabled websites, but on third-party review sites and social media.

Doing their homework

Let's look more in-depth at how the way that consumers research mattresses is changing.

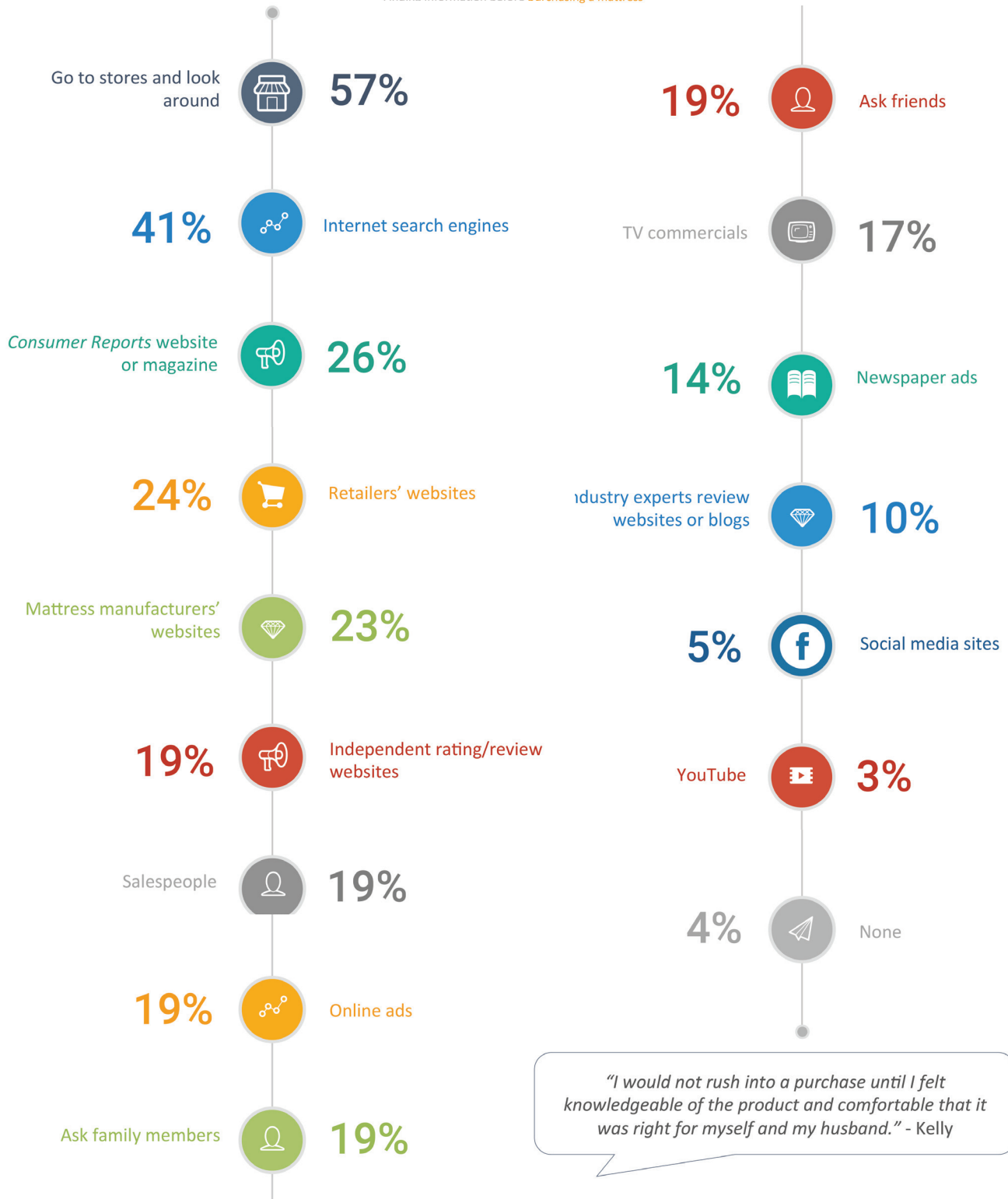
Today's consumers are informed shoppers. Although 17% of respondents report spending only one or two days researching and shopping for a mattress before making a purchase, half of consumers say they spend between three days and two weeks gathering information and considering their options before actually buying a bed.

"I would not rush into a purchase until I felt knowledgeable of the product and comfortable that it was right for myself and my husband," a respondent identified as Kelly said.

Think back to those respondents' descriptions of their research and shopping process. Here's the data that backs up the fact that those aren't outlier anecdotes: Some 57% of consumers report they "go to stores and look around" as part of their information-gathering process but they rely heavily on web-based resources, as well. When asked, "When you want to purchase a mattress, where do you usually find the information you need?" 41% turn to internet search engines,

Sources of Information

Finding information before purchasing a mattress



Researching Mattresses

The type of information consumers seek before purchasing a mattress



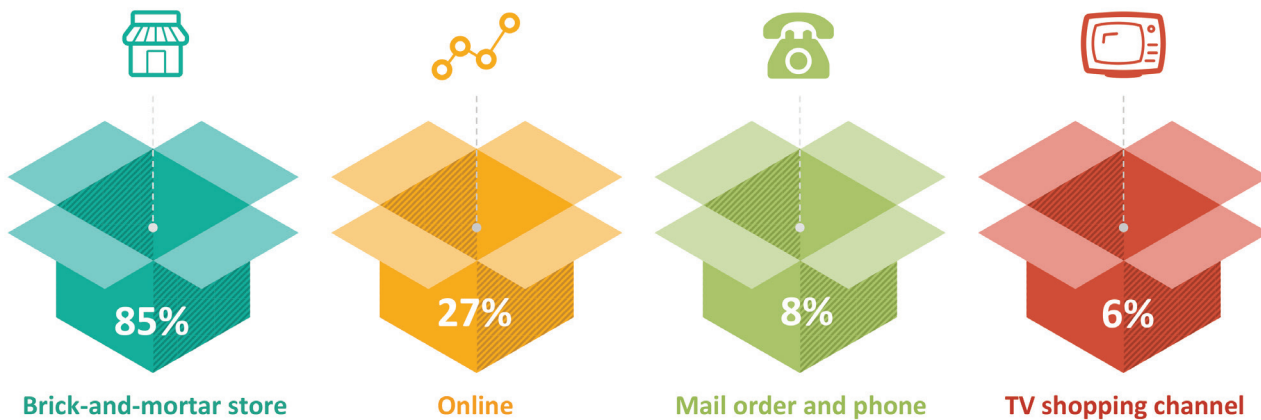
26% look at the *Consumer Reports* website (or magazine), 24% seek out retailers' websites and 23% visit mattress manufacturers' websites. Other sources of information include independent rating/review websites, advice from retail sales associates, online ads, and advice from family members and friends—all at 19%. (Respondents could choose more than one answer.)

Remember when your store ad budget was consumed by print and broadcast advertising? Today, only 17% of consumers rely on TV commercials for information about mattresses and only 14% turn to newspaper ads, according to the 2016 findings. How times have changed.

So, what do consumers want to learn during their informa-

Consumers Prefer Brick-and-Mortar Stores to Other Venues

Where consumers would consider buying a new mattress



However, more than a quarter of respondents would consider purchasing a new mattress online. The younger consumers were particularly likely to consider buying a new mattress online (41% of 18-35 year olds vs. 15% of 55+). Younger men (18-35) exhibited the highest interest in an online option (47%).

tion-gathering process? It's not surprising to learn that price is top of mind. Nearly two-thirds (65%) of respondents say they compare prices and more than half (54%) check out promotions and sales. But consumers also are keenly interested in product features, brands and constructions. Some 46% of consumers compare product features, 45% read consumer reviews, 41% look for information about mattress features, 38% search for details about different types of mattresses and 33% seek information about mattress brands. Less important to consumers doing research are store location (30%), information about bed bases (24%) and information about warranties (23%). (Respondents could choose more than one answer.)

Ready. Set. Shop!

While the latest research shows consumers are increasingly comfortable researching and, in fact, buying sleep sets online, shoppers still show a strong preference for actually purchasing mattresses in traditional brick-and-mortar stores. In fact, 85% of respondents say if they were looking for a new mattress today, they would walk into a local store and buy it. But more than a quarter (27%) of respondents said they would consider making their next mattress purchase online, either through an online-only retailer or through a traditional retailer with an e-commerce option. Other retail channels, including TV shopping channels, mail order and by phone, all drew only single-digit responses. (Respondents could choose more than one answer.)

Younger consumers, especially those "digital native" mil-

lennials, are much more comfortable buying a mattress online than older consumers: Only 15% of those 56 and older would consider purchasing their next mattress online, but 41% of those ages 18 to 35 say they would do so. Young men were most likely among all groups to say they would purchase a sleep set online (47%), according to the BSC research.

When consumers show a preference for brick-and-mortar retailers, it seems linked to their desire to rest-test a sleep set before buying it. An overwhelming 92% of consumers say it is very (66%) or somewhat (26%) important to try out a mattress before making a purchase. As a survey respondent identified as Erin said, "I probably wouldn't shop for a mattress online unless I had already tested it in a store and knew exactly which one it was."

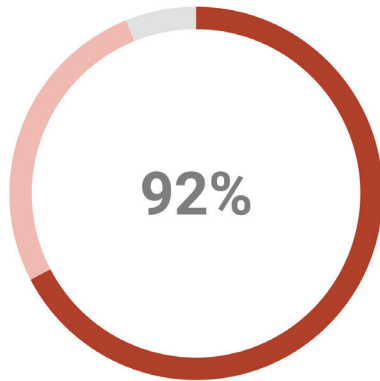
Another respondent, this one identified as Susan, put it this way: "I might consider buying from Amazon, since they carry so many brand-name items at competitive prices. I say 'might' because I still want to be able to experience that mattress' attributes or lack of them in real life."

But, here again, there are important differences based on a consumer's age. Some 73% of consumers 56 and older and 67% of consumers 36 to 55 say it is "critical" to rest-test a mattress before buying, but only 55% of consumers ages 18 to 35 agree.

Online-only and traditional retailers with e-commerce capabilities who offer generous return policies are making inroads with consumers who want to be able to rest-test a bed. "Ideally, I would like to touch and see it before I buy, but now

Importance of Brick-and-Mortar Stores

The vast majority of consumers insist on seeing and testing a mattress in a store before buying it



Importance of visiting B&M stores

92% of consumers say it is very (66%) or somewhat (26%) important to see and try out a mattress in a brick and mortar store before buying it.

Number of stores

Consumers visit on average two-three brick-and-mortar stores before making their decision



Age variable

While the vast majority of consumers acknowledge the importance of seeing and testing a mattress at a brick-and-mortar store before buying it, younger consumers are less likely to feel that it is critical. Fifty-five percent of 18-35 year olds say it is very important compared to 67% of 36-55 year olds and 73% of 56+.

In Their Own Words

Consumers reflect on Importance of Brick-and-Mortar Stores

"I probably wouldn't shop for a mattress online unless I had already tested it in store and knew exactly which one it was." - Erin

"Ideally I would like to touch and see it before I buy, but now that online stores are offering risk free trial periods it is no longer critical to see a mattress in a store." - Doreen

that online stores are offering risk-free trial periods, it is no longer critical to see a mattress in a store," the respondent identified as Doreen explained.

When consumers do buy from brick-and-mortar stores, 66% visit two or three stores before finally making their purchase. Only 13% shop only one store and buy there.

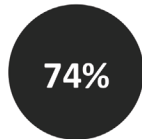
What kind of mattress retailers do consumers prefer? Specialty sleep chains are the go-to place, with 74% of shoppers saying they would buy their next mattress at that type of retailer. Survey respondents also expressed strong preferences for furniture stores (68%), local specialty stores (65%) and, to a lesser extent, department stores (55%). Other retailer preferences included direct from fac-

tory and warehouse clubs (both 45%), big discount stores (40%), home improvement stores (36%) and supermarkets (28%). An additional 31% of respondents reported they would consider buying specifically from an online retailer ("like Amazon") and 24% would consider purchasing from an online-only mattress retailer ("like Casper"). (Respondents could choose more than one answer.)

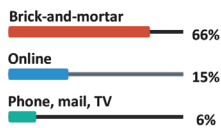
It should be noted that when posing this question, Fluent Research didn't assume shoppers would be visiting only the brick-and-mortar locations of traditional retailers. The query was phrased this way: "Which of the following stores would you consider buying your next mattress from, either by visiting their brick-and-mortar location, online or through other means?"

Retailer Preference

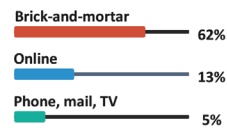
Consumers' choice of retailers for purchasing their next mattress



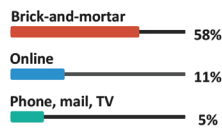
Specialty chain store



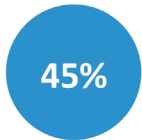
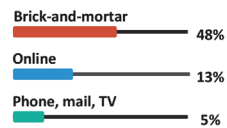
Furniture store



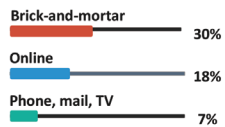
Local specialty store



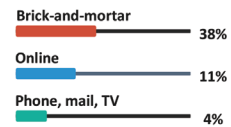
Department store



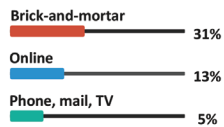
Direct from the factory



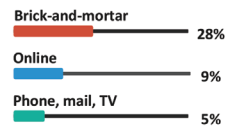
Warehouse club



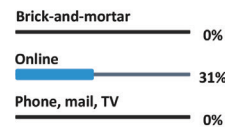
Big discount store



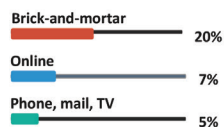
Home improvement store



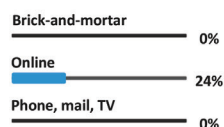
Online retailer, like Amazon



Supermarket



Online-only mattress retailer, like Casper



Which of the following stores would you consider buying your next mattress from, either by visiting their brick and mortar location, online or through other means? (N=2000)

In Their Own Words

Consumers reflect on **Retailer Preference**

"I might consider buying from Amazon, since they carry so many brand-name items at competitive prices. I say "might" because I still want to be able to experience that mattress's attributes or lack of them in real life." - Susan

"While I might look on the internet for information - I would only buy from a reputable sleep retailer. If there is an issue I would want the retailer behind me with the manufacturer." - David

"When I think of buying from a big-box store I don't think of buying something that I plan to keep for more than 10 years. Food, clothes, yes ... mattress not really." - Shelly

What drives the purchase?

Once consumers have done their research and shopped a few retailers, one all-important step remains: making the final decision to buy a specific mattress. And the BSC research provides retailers with fascinating insights into exactly what drives consumers to make the actual purchase.

In reporting the survey results, Fluent Research groups more than two dozen specific factors that consumers consider when making their purchasing decision into seven broad categories: (The percentages refer to the percent of respondents who rated at least one factor in each category as very important in their decision-making: 8-10 on a 10-point scale.)

1. Benefits, such as comfort, that they will derive from their new mattress (91%)
2. Customer service, such as free delivery (91%)
3. Choice, meaning a wide selection of brands or construction types (88%)
4. Retail environment, such as a store's cleanliness (87%)
5. Retail sales associates (are they knowledgeable? friendly?) (86%)
6. Reputation of the store or mattress brand (84%)
7. Price, including sales and available financing (82%).

It shouldn't be surprising that, when it comes down to it, consumers prioritize the direct benefits—particularly comfort—that a new mattress will provide them.

As one respondent said: "Comfort, comfort and comfort are my three most important criteria. Then I balance things such as price, manufacturer's reputation, country of origin, vendor location, guarantee and the experience of other consumers."

Specific factors related to mattress benefits that were mentioned in the survey include:

- The comfort and support of the mattress (86% of respondents cited this as an important factor influencing their decision to buy—or not to buy—a mattress)
- Sleep/health benefits of mattresses (73%)
- Information about mattress construction (70%)

In news that should be especially encouraging to mattress retailers, many of the factors that ultimately drive a consumer's decision to buy a mattress are matters that retailers can control—like customer service, the retail environment, and the attitudes and behaviors of RSAs.

Specific factors related to customer service that were mentioned in the survey include:

- Free delivery (80%)
- Easy returns (68%)
- Long-term warranty (67%)
- "White-glove" delivery (52%)
- Offer of a free trial at home (51%)
- Mattress recycling (44%)
- Delivers compressed mattress in a box (35%)
- You can avoid going to the store (29%)

Specific factors related to the retail environment—both in-store and online—that were mentioned in the survey include:

- Cleanliness/appearance of the store (74%)
- A relaxed environment (68%)
- Easy to use/shop at website or store (66%)
- Displays mattresses the way they would look in the bedroom (60%)




- Attractive website design (32%)
Specific factors related to RSAs (sometimes referred to as “salespeople” in the research) that were mentioned in the survey include:
 - Nonpushy salespeople in the store (77%)
 - Knowledgeable salespeople in store (71%)
 - Sales associate was a good listener (54%).

See the charts above and on page 30 for more details about the specific factors related to the broader categories of choice, reputation and price.
And we’ll leave you with this final bit of good news: The vast majority (83%) of survey respondents who shopped for a mattress in the past five years were satisfied with the experience.

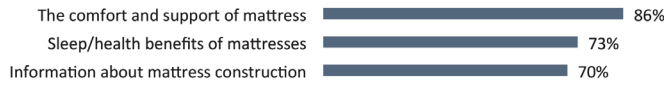



Purchase Drivers

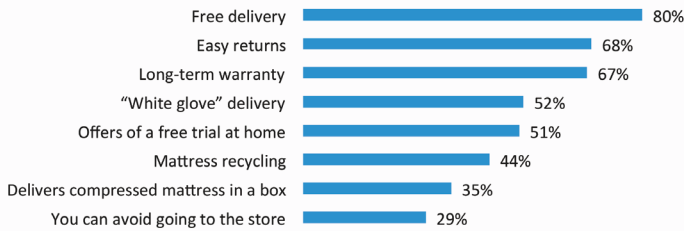
Factors associated with mattress benefits and retailers' customer service are the top influencers of purchase



Benefits
91%

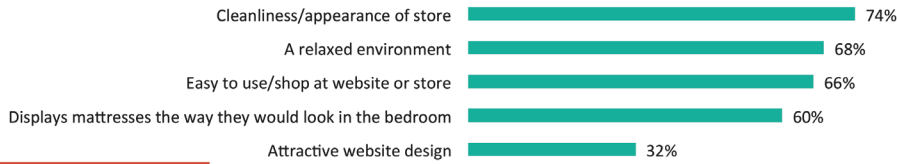




Choice
88%





Customer service
91%


When you shop for a mattress, how important are the following factors in influencing your decision to buy or not to buy? (Top 3-box, 1-10 scale, N=2000)

Retail environment
87%



Salespeople
86%

Reputation
84%



Price
82%



When you shop for a mattress, how important are the following factors in influencing your decision to buy or not to buy? (Top 3-box, 1-10 scale, N=2000)

SURVEY METHODOLOGY

Since 1996, the Better Sleep Council, the consumer-education arm of the International Sleep Products Association, has conducted research to better understand and track changes in consumers' attitudes toward sleep and health, their decision-making process with regard to mattress purchases, and their shopping preferences and habits when it comes to sleep sets and related products.



As in past rounds of research, the 2016 study used a combination of quantitative and qualitative methodologies. Specifically, the latest research was carried out by New York-based Fluent Research and included three phases:

PHASE 1: An online "bulletin board" conducted in December 2015 that included input from 35 consumers recruited from regions across the country. The bulletin board mod-

erator was able to ask questions of the group, as well as of individuals, and the respondents in the group could reply to each other, in addition to the moderator. Respondents posted photos and videos of their bedrooms and sleep sets.

PHASE 2: Shopping ethnographies with 10 consumers who were in the market to purchase a new mattress. Each respondent visited three retailers and documented their experiences using photos and videos, answering survey questions, and participating in an open-ended discussion. A few of these shoppers ended up purchasing a mattress as a result of the experience.

PHASE 3: The final phase was an online survey of 2,000 consumers nationwide. The sample was representative of the overall U.S. population of adults (ages 18+) but was screened to include consumers who participate in decision-making when it comes to mattress purchases. **O**

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What moves consumers to replace their mattress?



Recent research from the Better Sleep Council indicates health, comfort, deterioration, new technologies and product choices all play a role in shoppers' willingness to head to retail stores and websites to buy a new bed set. And many plan to take that step sooner rather than later

BY JULIE A. PALM

Graphs and quotations
courtesy of Fluent Research

Retailers get ready: Four out of five consumers plan to replace their current mattress and about one in three of those expect to do so within the next two years, according to new consumer research from the Better Sleep Council, the consumer-education arm of the International Sleep Products Association.

As those consumers head into your stores and onto your websites, they are both keenly aware of and interested in the latest, greatest bedding technologies—so much so that some may be ready to take advantage of those new features even before their current bed set wears out.

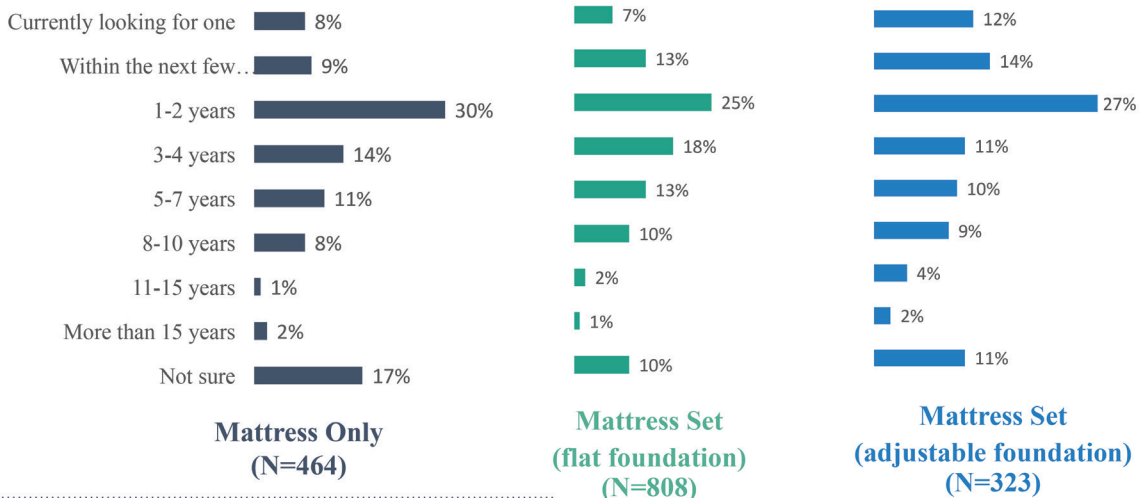
The BSC has been conducting quantitative and qualitative consumer research since 1996. The research's goal: better inform the communications strategy of the sleep products industry so that it can, in turn, better educate consumers about the health and wellness benefits of sleeping on a quality mattress set and the importance of regular mattress replacement. The most recent BSC research, conducted in 2016 by New York-based Fluent Research and released at the end of the year, shows the industry is making significant progress in getting those messages across to consumers.

Here we'll look at more key results from the research, including what prompts consumers to shop for a new bed set and what they think about all the product choices available to them today.



Plans to Buy a New Mattress

80% of respondents plan to replace their mattress, and 37% plan to do so within the next two years



When do you plan to buy a new mattress or mattress set to replace the one you have now? (N=2000)

Time to break up with your bed

Of the 37% of consumers who intend to replace their bed within the next two years, 6% currently are shopping for a new mattress, 10% plan to do so in the next few months and 21% expect to start shopping in one to two years.

However, a significant portion of consumers are operating on a longer time frame—albeit one that fits within schedules that the BSC and mattress industry encourage in terms of mattress replacement. Some 12% of consumers reporting they’ll be in the market for a new bed in three to four years and 9% in five to seven years. These next groups, unfortunately, still need to get the message about the importance of more frequent mattress replacement: 7% expect to buy a new mattress in eight to 10 years, 2% say they might purchase a new one in 11 to 15 years and 1% see mattress shopping as a long-long-range plan more than 15 years in the future.

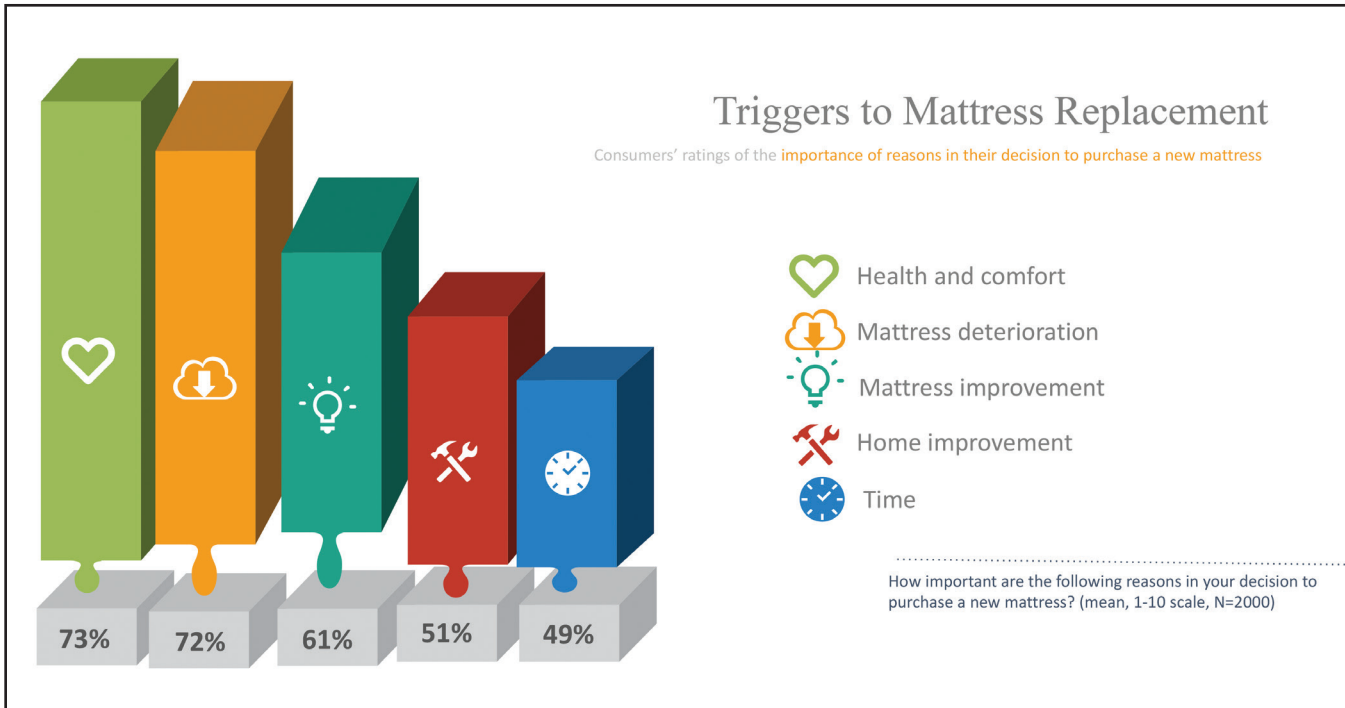
Consumers, the research shows, don’t simply rise one morning and think, “Hey, let’s go mattress shopping.” (Ah, if only they did!) Instead, their decision to replace their current bed set appears triggered most often by a host of factors clustered around three broad causes—health/comfort (with 73% of survey respondents mentioning at least one factor in this category as a trigger), mattress deterioration (72%) and mattress improvement (61%). For instance, a respondent identified as Doreen replaced her bed after experiencing back pain over a period of time and realizing she’d been sleeping on her current bed—which had likely begun to deteriorate in terms of support and comfort—for more than a decade.

“One day, I mentioned to a friend I was waking up every day with a sore back. She asked how old my mattress was and when I told her it was about 10 years old, she said that was my problem,” Doreen said. “It hadn’t dawned on me till that moment that I needed a new mattress. I did research and found out my mattress was past its prime, so I bought a new one.”

The fact that so many consumers see the strong link between their mattress and their health is one of the many delightful informational nuggets found in the BSC research. It confirms the success of the industry’s efforts to get consumers to understand that the quality and condition of their mattress directly

MORE TO COME

SLEEP SAVVY FIRST SHARED RESULTS FROM THE Better Sleep Council’s consumer research in the January/February 2017 issue of the magazine, looking at how today’s consumers are replacing their mattresses more often than in the past and expecting to pay more when they do. We also examined consumers’ preferences when it comes to researching products before purchase and where they are most likely to shop for a new bed set. You can read that article and find a wealth of informative charts at SleepSavvyMagazine.com. We’ll finish our deep dive into the survey results in the April issue of the magazine, exploring how consumers shop for sleep accessories, the value they put on sleep and more.



impacts their sleep and overall wellness.

Several factors go into the broader category of health/comfort. Specific issues mentioned in the survey include:

- When your mattress does not provide a good night's sleep (83% of respondents cited this as a very important reason for mattress replacement)
- When you wake up with a sore back or stiff muscles (73%)
- When your current mattress is too soft (not firm) (63%)
- When your doctor recommends it (51%)
- When your body changes (for example, gaining weight) (45%)
- When your current mattress is too firm (42%)

The BSC encourages consumers to evaluate the condition of their mattress every five to seven years and consumers appear to recognize changes in their beds that should prompt replacement. Specific factors mentioned in the survey related to mattress deterioration include:

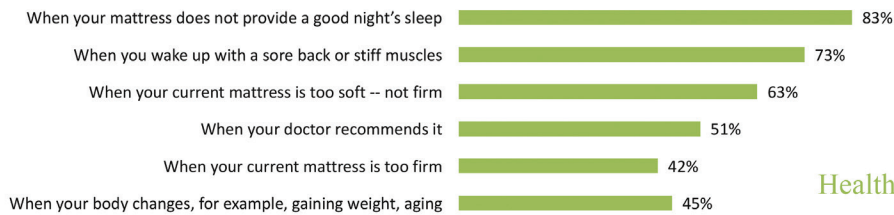
- When your current mattress sags in the middle (81% rated this as a very important reason to purchase a new mattress)
- When the coils/springs of your current mattress are uncomfortable (76%)
- When the mattress becomes too noisy or squeaky (61%)
- When there are many stains on the mattress (54%)

We would expect (or at least hope) that an aching back or a visibly lumpy mattress would send a consumer out shopping for a new one, but the most recent survey shows something intriguing: Many consumers are willing to buy a mattress just to take advantage of bedding innovations, such as new materials, constructions and technologies. In other words,

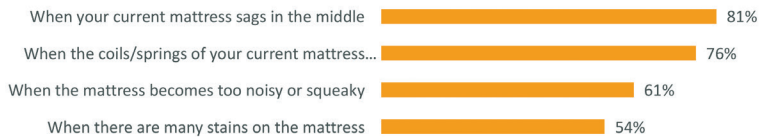


"One day I mentioned to a friend I was waking up every day with a sore back. She asked me how old my mattress was, and when I told her it was about 10 years old, she said that was my problem. It hadn't dawned on me till that moment that I needed a new mattress. I did research and found out my mattress was past its prime, so I bought a new one." -Doreen

Triggers to Mattress Replacement



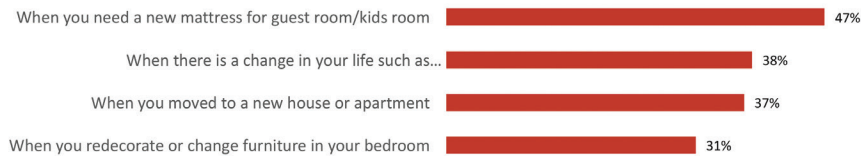
Mattress Deterioration



Mattress Improvement



Home Improvement & Lifestyle



consumers would buy a new bed because they *want to* rather than because they *have to*. Specific mattress improvements mentioned in the survey include:

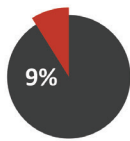
- When you want to upgrade to a better mattress (64% say this is a very important reason to purchase a new mattress)
- When you want a bigger mattress (51%)
- When you want to try a new mattress technology (42%)

- After you have experienced a better mattress in a hotel (41%)

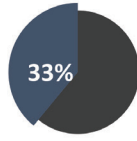
Slightly less important overall to respondents in terms of triggering a replacement decision were factors related to home improvement, such as moving to a new home, and time frame, such as reaching the end of the mattress warranty.

Adjustable Beds: Interest and Familiarity

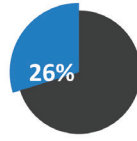
One third of consumers are interested in buying an adjustable foundation bed



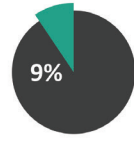
Own one



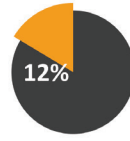
Familiar with and would be interested in buying one



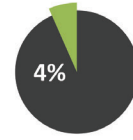
Familiar with but not interested in buying one



Not familiar with and not interested in buying one



Not familiar with but would like to learn more about it



Not familiar with but would definitely be interested in buying one

"I am aware of the adjustable bed frames. I think it is good if you watch TV in your bedroom to sit-up, or for people with breathing or other issues that need the bed adjusted." - Kelly

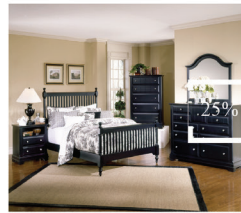
Are you familiar with adjustable foundation beds that allow you to elevate, lower or bend different parts of a mattress?

Bedrooms and Their Function

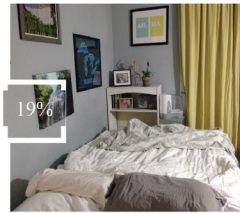
One in four consumers thinks of her bedroom as a sanctuary



My bedroom is just a place to sleep (48%)



My bedroom is my sanctuary, a place for me to relax and have "just for me" time (25%)



My bedroom is an all-purpose room where I sleep, work, go online (19%)



My bedroom is a family room where the whole family gathers to watch TV, snuggle (7%)

"My favorite room in the house! I keep my bedroom very minimal and free of distractions. My bedroom is for sleeping and I've designed it in a way that promotes that. The room is in a very neutral color, lots of comfy pillows and I splurge on 750 thread count sheets. No TVs or electronics. I keep books around my nightstand, a candle for relaxation, and some artwork." - Rosanna

Adjusting to the idea of adjustables

One technology consumers seem interested in is adjustable bed bases—a product specifically included in the BSC survey for the first time. According to the 2016 results, 9% of consumers own an adjustable base and another 33% say they are familiar with the product and would consider buying one.

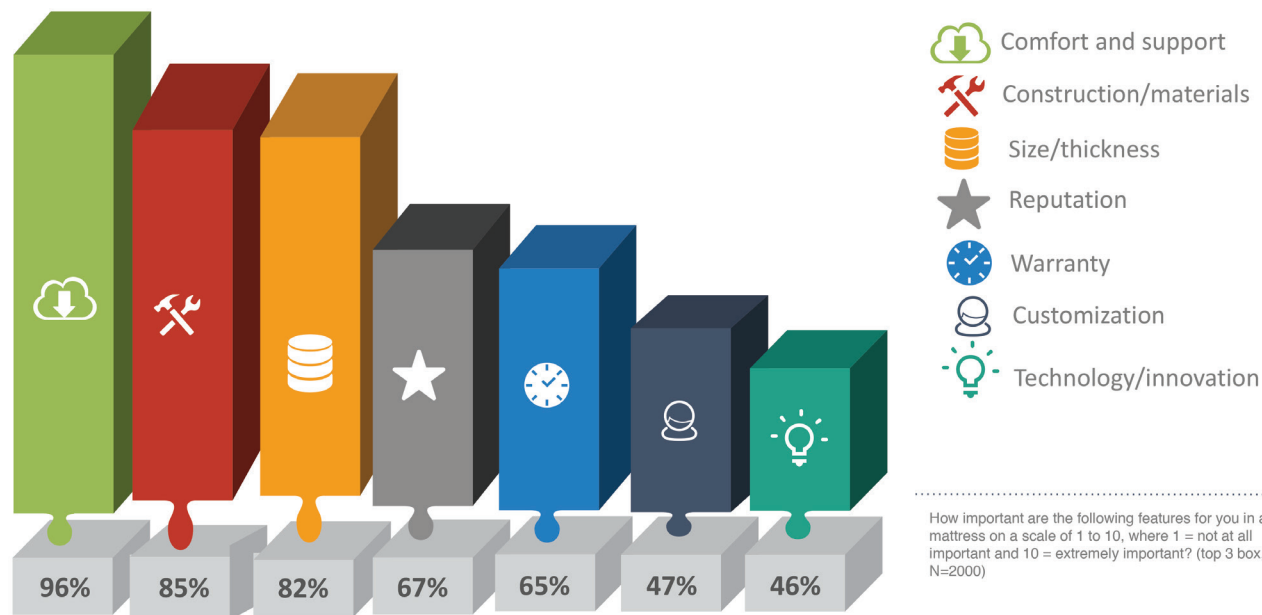
"I am aware of the adjustable bed frames," said a respondent identified as Kelly. "I think it is good if you watch TV in

your bedroom to sit up, or for people with breathing or other issues that need the bed adjusted."

And there's room for growth in the category, the research shows: 12% of respondents say they aren't familiar with adjustable bases but would like to learn more about them. Other consumers, alas, may be harder to reach: 26% say although they are familiar with adjustable foundations, they have no interest in purchasing one, while another 9% say they are

Comfort and Support are the Most Important Features in a Mattress

Consumers' ratings of the importance of features in a mattress



neither familiar with nor interested in such a base.

Consumer interest in adjustable bed bases—which not only help alleviate health issues like snoring and back pain but make it easier for people to read, watch TV and even work in bed as respondent Kelly indicated—makes sense when we look how survey respondents view their bedrooms. Some 48% look at their bedroom as a utilitarian space, describing it as “just a place to sleep.” But the majority of people see their bedroom quite differently. A respondent identified as Rosanna represents the 25% of people who call their bedroom a “sanctuary”—a concept promoted by the BSC for optimal rest and relaxation. As Rosanna said about her space: “My favorite room in the house! I keep my bedroom very minimal and free of distractions. My bedroom is for sleeping and I’ve designed it in a way that promotes that. The room is in a very neutral color, lots of comfy pillows and I splurge on 750-thread-count sheets. No TVs or electronics. I keep books around my nightstand, a candle for relaxation and some artwork.”

Another 19% of consumers describe their bedroom as “an all-purpose room where I sleep, work, go online” and 7% use their bedroom as a family room where everyone gathers.

Retail marketing of adjustable bases—with their vast array of features, from head-and-foot tilt to massage options to charging ports—could be tweaked to appeal to each of these groups. For instance, consumers who see their bedrooms “just for sleep” might appreciate things like anti-snore settings.

Defining quality

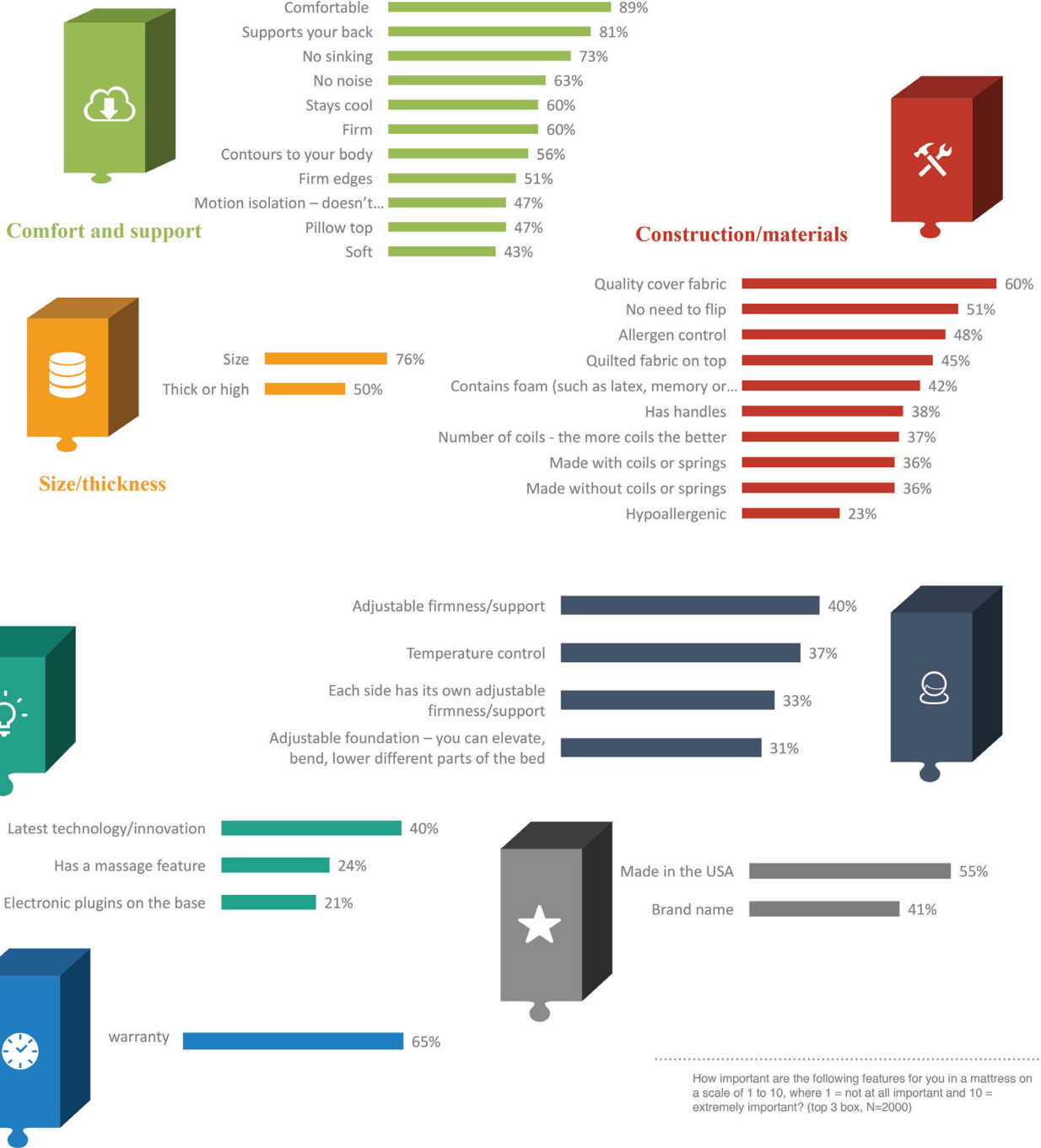
When consumers shop for a new mattress, what are they seeking? Or, to put it another way, how do they define a quality product they’d want to buy? As with their replacement decision, consumers consider a constellation of factors, according to the BSC research. Not surprisingly, they rated aspects connected to comfort/support highest, followed not far behind by features tied to construction/materials and size/thickness. (The survey asked, “How important are the following features for you in a mattress on a scale of 1 to 10, where 1 = not at all important and 10 = extremely important?”)

Specific factors related to mattress comfort/support that were mentioned in the survey include:

- Comfortable (89% of consumers rate this as a very important quality or feature in a mattress)
- Supports your back (81%)
- No sinking (73%)
- No noise (63%)
- Stays cool (60%)
- Firm (60%)
- Contours to your body (56%)
- Firm edges (51%)
- Motion isolation (doesn’t move) (47%)
- Pillow-top (47%)
- Soft (43%)

Comfort and Support are the Most Important Features in a Mattress

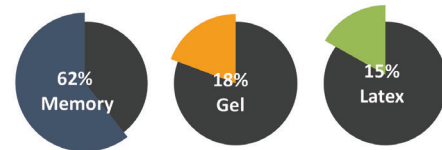
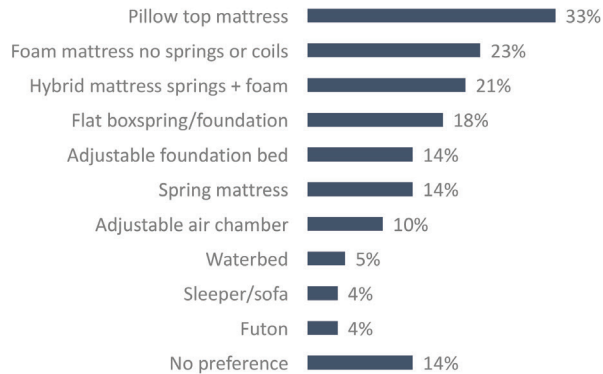
Consumers' ratings of the importance of features in a mattress



Pillow-top is the most popular type of mattress. Two fifths opt for either a foam mattress or a hybrid (springs + foam).

Mattress Type Preference

Consumers' opinions of the technology best suited for a good mattress today



Foam Preference

Which of the following types of foam is best suited for a good mattress? (N=781)

In your opinion, which technology is best suited for a good mattress today? What type of mattress do you sleep on? (N=2000)

Foam and hybrid mattresses are aspirational, particularly for 18-54 year old consumers

Consumers rated the following features related to mattress construction/materials as very important:

- Quality cover fabric (60%)
- No need to flip (51%)
- Allergen control (48%)
- Quilted fabric on top (45%)
- Contains foam (such as latex, memory or gel) (42%)
- Has handles (38%)
- Number of coils (the more coils the better) (37%)
- Made with coils or springs (36%)
- Made without coils or springs (36%)
- Hypoallergenic (23%)

Specific factors related to mattress size/thickness that were mentioned in the survey include:

- Size (76%)
- Thick or high (50%)

Respondents to the survey also considered items such as a mattress brand's reputation, warranty, customization options, and technology/innovation. (For more details on how consumers believe these factors are related to a mattress' quality, see the chart on page 42.)

When it comes to mattress types, consumers voice a preference for pillow-tops, but not by wide margins as several other constructions also find favor. When asked, "In your opinion, which technology is best suited for a good mattress today?" 33% of respondents cited pillow-top mattresses. But 23% prefer foam-only mattresses and 21% favor hybrids. Another 14% say a "spring mattress" is the best sleeping surface and 10% picked adjustable air chamber. Earning responses in the single digits

were waterbeds (5%), sleeper sofas (4%) and futons (4%). (Respondents could choose more than one answer.)

Among consumers who prefer foam (either foam-only or hybrid mattresses with foam and springs), memory foam is most popular, with 62% saying it is "best suited for a good mattress." Another 18% favor gel and 15% prefer latex. This isn't surprising given that memory foam defined the category early on and remains a staple foam offering from most mattress manufacturers and retailers.

So many choices

To recap: A significant portion of consumers are now or soon will be in the market for a new mattress set, many are interested in new technologies available to them (including adjustable bases) and they are fairly clear about what they want in terms of quality and comfort. Now they just need to look at the mattresses available and pick one—from the dozens, even hundreds that may be readily available to them depending on where they live and how they like to shop.

Consumers, the BSC research shows, are aware of and appreciate the fact that they have more choice in mattress constructions and types than ever before. (Yay!) In fact, 85% of respondents said they agree (50% strongly agree) with the statement, "Today, there is a great variety of mattresses available for every taste."

As one respondent said, "Yes, there is a lot more to choose from now as new materials and styles are invented. It gives you a wide range to choose from. It affects my decision making by always wanting the latest and greatest."



But all that choice comes with drawbacks as some consumers report being baffled by all the choices.

As one respondent put it, “While the selections have increased, so has the confusion. Every store has a cutaway and theirs is the best. Even the same manufacturer has made the same product with different names for different stores and outlets so you can’t really do a head-to-head comparison like you can with a car.”

Another respondent explained how the increased choice is changing prepurchase behavior: “Absolutely, we have more choices than even not too long ago. ... The impact this has had on my shopping has been that I want to look at all types before I decide on a new mattress, and the research takes a lot longer than it used to. A bed is a huge investment, not only in money, but also in quality of life since we spend so much time on it. I want to make sure I make a good decision, and that’s not an easy task with all the choices out there.”

Such comments point to a need for retailers to find better ways to clearly differentiate features and benefits of bed sets in a way that consumers can quickly understand. Doing so both in-store and online can help speed up their research and decision-making processes, getting consumers into the right mattress and on their way to a better night’s sleep sooner. (See sidebar on customer satisfaction on page 46.)

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Satisfied customers



FOR THE MATTRESS INDUSTRY, some of the most encouraging news found in the latest consumer research from the Better Sleep Council is that people generally like their mattresses. About eight in 10 report that they are satisfied with their current mattress (43% are “very satisfied”; 38% “some-

what satisfied”). The flipside also is heartening: Just 14% of survey respondents report being dissatisfied with their current bed (7% “somewhat dissatisfied”; 4% “very dissatisfied”). The remaining 8% report “neutral” feelings about their current sleep set.

Some of that satisfaction may come from the fact that nearly half of respondents are sleeping on relatively new mattresses, with 49% having bought a mattress for them-

selves in the past four years. Another 32% are sleeping on a mattress that’s five to 10 years old, with just 15% sleeping on a bed they’ve had for more than 11 years.

For its own continued success, the bedding industry should strive for continual improvement. But these results indicate, that, for the most part, manufacturers are making and retailers are selling good, quality products that are meeting consumers’ needs. **O**



Julie A. Palm is chief wordsmith at Palm Ink LLC in Winston-Salem, North Carolina. She has 25 years of experience as a writer and editor for newspapers and magazines and as a publications director. She is a past editor in chief of both Sleep Savvy and BedTimes magazines. She can be reached at japalm623@gmail.com.

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SURVEY METHODOLOGY

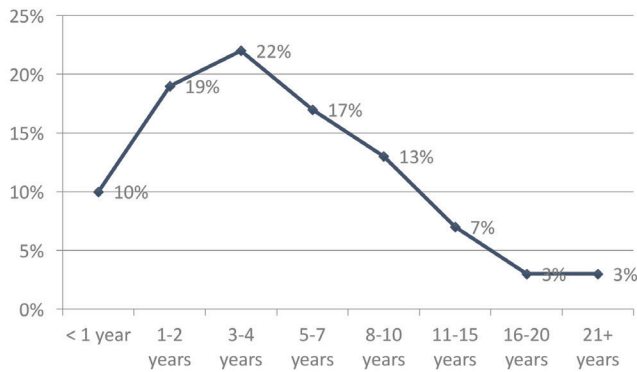
SINCE 1996, THE BETTER SLEEP COUNCIL, THE consumer-education arm of the International Sleep Products Association, has conducted research to better understand and track changes in consumers’ attitudes toward sleep and health, their decision-making process with regard to mattress purchases, and their shopping preferences and habits when it comes to sleep sets and related products.

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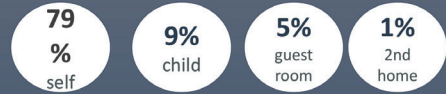
- **PHASE 1:** An online “bulletin board” conducted in December 2015 that included input from 35 consumers recruited from regions across the country. The bulletin board moderator was able to ask questions of the group, as well as of individuals, and the respondents in the group could reply to each other, in addition to the moderator. Respondents posted photos and videos of their bedrooms and sleep sets.
- **PHASE 2:** Shopping ethnographies with 10 consumers who were in the market to purchase a new mattress. Each respondent visited three retailers and documented their experiences using photos and videos, answering survey questions and participating in an open-ended discussion. A few of these shoppers ended up purchasing a mattress as a result of the experience.
- **PHASE 3:** The final phase was an online survey of 2,000 consumers nationwide. The sample was representative of the overall U.S. population of adults (ages 18+) but was screened to include consumers who participate in decision-making when it comes to mattress purchases.

Mattress Purchasing History

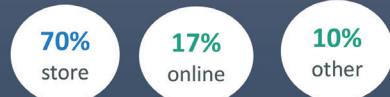
One in two consumers last purchased a mattress within the past 4 years



How long ago did you last purchase a mattress either for yourself or for somebody else in your household? (N=2000)



Last mattress bought for



Last mattress bought

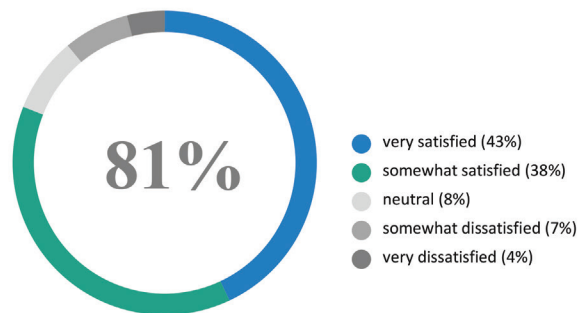


Number of mattresses bought in the last 10 years



Satisfaction with Mattress

The vast majority of respondents are **satisfied with their current mattress**



How satisfied are you with your current mattress? (N=2000)

Sleep-mattress link clear

In the final installment about the Better Sleep Council's 2016 study, *Sleep Savvy* examines consumers' attitudes toward sleep, accessory shopping habits and demographic profiles

BY JULIE A. PALM

EVERYONE WANTS TO BE HEALTHY, AND THE MAJORITY of consumers recognize that one of the best ways to improve their well-being is to get a good night's sleep, according to new research from the Better Sleep Council, the consumer-education arm of the International Sleep Products Association.

Sleep, respondents to the 2016 survey said, is more vital to their overall wellness than other key components of a healthy lifestyle, including a nutritious diet, exercise or regular medical checkups.

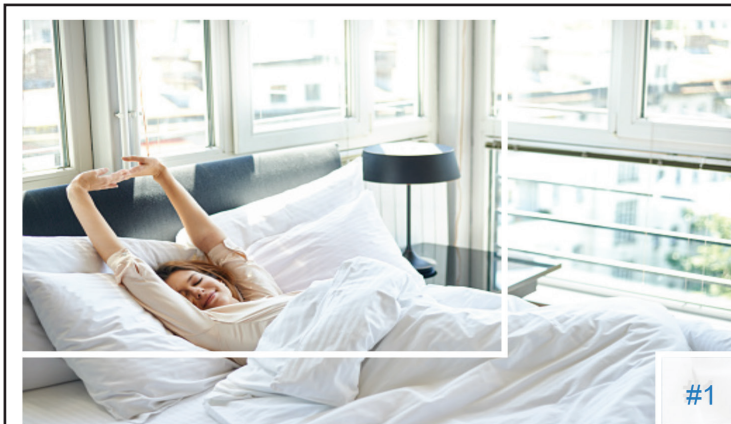
And, even more importantly for mattress retailers, consumers see a direct connection between the quality of sleep they get each night and the quality of their mattress. In fact, 85% agree with the statement, "A good mattress is key for getting a good night's sleep."

The findings come from BSC research conducted by New York-based Fluent Research, which we've been reporting on in *Sleep Savvy* beginning with an article in the January/February 2017 issue. (See story on page 25.) In this final installment, we'll look more at consumers' attitudes about sleep, as well as their thoughts on bedding accessories. We'll also identify five prototypical consumers to help you hone your merchandising, selling and marketing strategies.



Graphs and quotations courtesy of Fluent Research





"Sleep is very important to me. If I don't get a quality night's sleep it affects everything else I do. After a bad night's sleep I have less energy to exercise, I am more likely to have just whatever is around for breakfast and tend to be less effective at work." - Erin



How important are the following factors for your health and well-being on a scale of 1-10, where 1 means not at all important and 10 means extremely important? (Top 3 box, very important, N=2000)

The mattress-sleep-wellness connection

Consumers generally realize that when it comes to good health, there is no magic pill: It requires a series of good habits to stay feeling your best. But sleep is foundational, and 85% of BSC survey respondents rate it as very important to their health and well-being. After sleep, they say, comes a healthy diet (76%), stress management (75%), regular medical checkups (71%), physical exercise (70%) and maintaining work-life balance (60%).

A survey respondent identified as Erin explained the wide-ranging effects a single night of poor quality sleep has on her own life. "Sleep is very important to me. If I don't get a quality night's sleep, it affects everything else I do," she said. "After a bad night's sleep, I have less energy to exercise, I am more likely to have just whatever is around for breakfast and tend to be less effective at work."

Erin is not alone. In a report accompanying the results, Fluent Research explains that when respondents discussed having a bad day, it "invariably featured a restless night or insufficient sleep."

And a bad day traced back to a bad night's sleep often can be traced further back to a worn-out or poor quality mattress. Nearly eight in 10 consumers agree that "sleeping on a poor quality mattress is bad for your health" (78% agree; 41% strongly agree) and three-quarters agree that "sleep problems are often caused by a poor mattress" (75% agree; 33% strongly agree).

But what a difference a new comfortable, supportive mattress can make. A respondent identified as Gordon explained it this way: "We have recently purchased a new mattress and it's totally helped. I used to fall asleep on the couch with the TV on. With the nice new mattress, I now shut off the TV and

go to bed." (The retailer who sold Gordon that bed should really track him down for a testimonial.)

It's a simple equation: Good mattress = good night's sleep = good health and well-being. And consumers understand it, especially older consumers. Fifty-six percent of respondents 56 and older strongly agree that a good mattress is key for getting a good night's sleep, compared with only 41% of those ages 18 to 35. This is not entirely surprising. When we're young we tend to be able to fall asleep any-

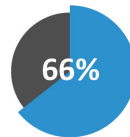
TO READ MORE RESEARCH FINDINGS

THIS IS THE THIRD AND FINAL IN A SERIES OF articles examining the results of the latest consumer research from the Better Sleep Council, the consumer-education arm of the International Sleep Products Association. In the January/February 2017 issue of *Sleep Savvy*, we shared the welcome news that consumers are replacing their mattresses more often than in the past and expect to pay more for them when they do. We also explored consumers' preferences when it comes to product research and shopping channels. In the March 2017 issue, we reported that consumers generally are happy with their current mattress but many are now or soon will be in the market for a new bed and are intrigued by new bedding technologies available to them. In the March issue, we also looked at how consumers define a "quality" mattress and what they think about adjustable bases. You can read those articles, along with a multitude of informative charts, at SleepSavvyMagazine.com.

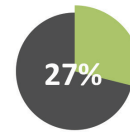
Two in five Americans do not get enough sleep



In general, do you feel that you get more than enough sleep, the right amount of sleep or not enough sleep? (N=2000)



Need 8+ hours



Get 8+ hours

"We have recently purchased a new mattress and it's totally helped. I used to fall asleep on the couch with the TV on. With the nice new mattress I now shut off the TV and go to bed." - Gordon

How much sleep do you need to feel well-rested and energized in the morning and how much sleep do you typically get? (N=2000)

where, on virtually any surface, but as we age our bodies change and we encounter health problems that disrupt a full night's rest. Given that, older consumers may better appreciate products that help them sleep and feel better.

It also won't be surprising to mattress retailers—but it's nice to have it validated—that consumers' satisfaction with their sleep correlates with the age of their mattress. People sleeping on newer mattresses sleep better. Specifically, nearly a quarter (24%) of people sleeping on a mattress they bought within the past four years are very satisfied with the quality of their sleep, but only 15% of those sleeping on a mattress 11 years old or older are equally satisfied.

Trouble sleeping

Unfortunately, although they know how important sleep is to their health, for many people it remains elusive and increasingly so. According to the BSC research, 42% of people report they aren't getting enough shut-eye. In fact, 66% say they require eight or more hours of sleep to feel "well-rested and energized in the morning," but only 27% actually manage to sleep that much. It's not just a matter of quantity: 30% of people say they are dissatisfied with the quality of their sleep—up significantly from 22% in 2007, the last time the BSC study was conducted.

A host of things keep people awake. Stress is tops on the list, with 37% of respondents pointing to that as a main disruptor. That's up, too—from 27% in 2007. Other common sleep interrupters include wrong bedroom temperature (27%), noise (19%), bad mattress (16%), wrong pillows (14%), light (13%), pets (13%), a snoring partner (11%) and children (9%). (Respon-

dents could choose more than one answer.)

Retailers may not be able to do much to reduce people's stress, but you can help them eliminate some disruptions. For instance, make sure your selection of mattresses, bases and pillows include technologies that improve the sleeping microclimate and reduce snoring. And train your retail sales associates to explain those benefits clearly to shoppers—because tired, sleepless consumers are actively seeking ways to get more rest.

We're happy to report that many of consumers' approaches to getting more sleep are strategies also endorsed and promoted by the BSC. For instance, 41% of research respondents try to go to bed at the same time each night and 30% get up at the same time, even on weekends; 39% use room fans, which provide white noise and cool the room; 34% "use comfortable bedding"; 30% avoid caffeine late in the day; 30% avoid eating late in the evening; 23% read before bedtime; 19% turn off electronics well before it's time to sleep; 18% invest in a quality mattress (or sleep set); 16% create a calming environment in their bedroom; 16% open windows to let in fresh air; and 12% listen to soothing music or white noise as they fall asleep.

All these, according to the BSC, are effective and easy-to-implement methods to improve sleep. Most have the added benefit of being low cost or even no cost. But the survey shows people also rely on strategies that the BSC says can actually impair sleep, including watching TV before bed (30%) or falling asleep with the TV on (19%), and checking emails or social media before bedtime (10%). (Respondents could choose more than one answer.)

Nearly a third of Americans are dissatisfied with quality of their sleep

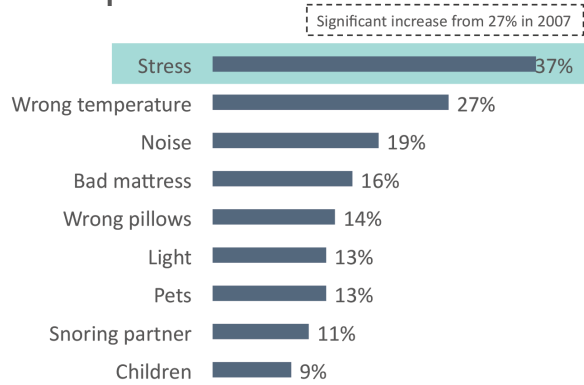


Satisfaction

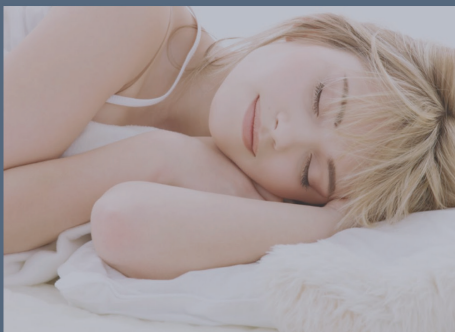
How satisfied are you with the quality of your sleep?
(N=2000)

satisfaction correlated with mattress age:

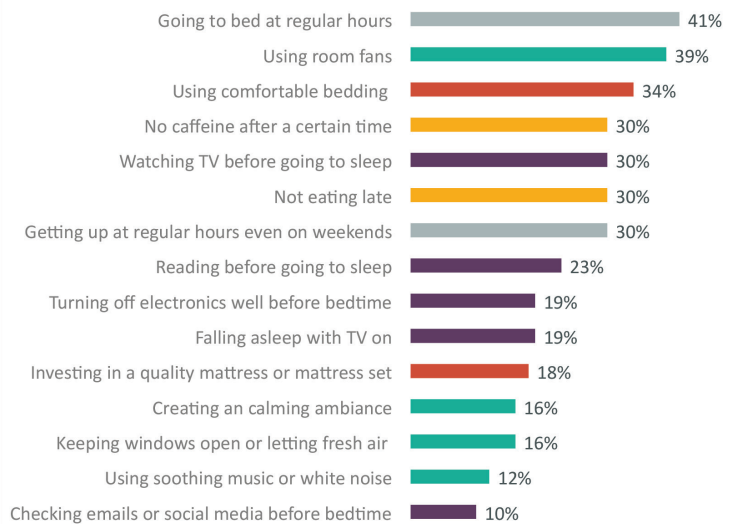
- 0-4 years – 24% very satisfied;
- 11+ years – 15%



What are the main factors that disturb your sleep?
(N=2000)



Strategies for Improving Sleep



- Timing
- Environment
- Bedding
- Food
- Media

Which of the following strategies do you use to improve the quality of your sleep? (N=2000)

Bedding Accessories

While virtually all consumers use sheets and pillows, use of other accessories varies greatly



52% Use mattress pads

25% Use mattress protectors

15% Use mattress toppers

Frequency of Replacing Bedding

Average number of years consumers replace their bedding accessories



More than a mattress

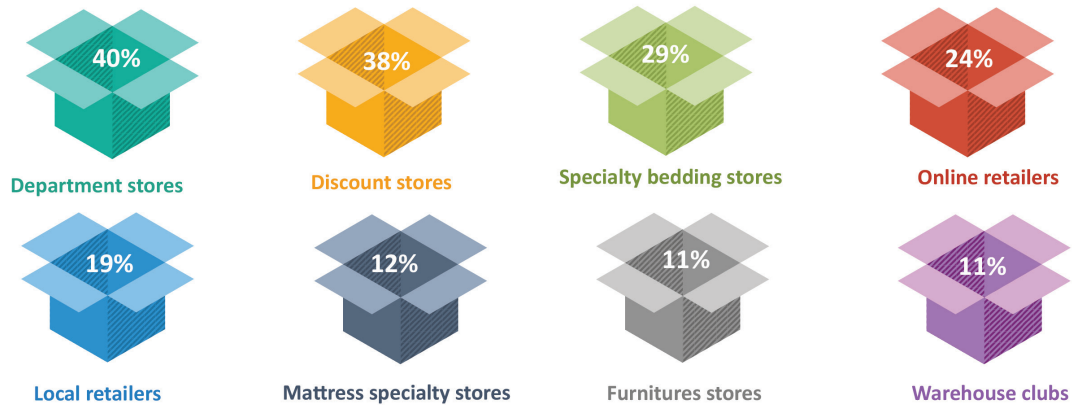
In the sleep products industry, we sometimes shorthand “mattress” to stand for the entire bed set of mattress and foundation or even the full sleep ensemble that includes protectors, pillows and linens. And if you’ve read even one other issue of *Sleep Savvy*, you know we’re evangelists for selling complete sleep ensembles so that you can provide your customers with the products they need to create an

inviting sanctuary-style bedroom that beckons them each evening to get their best night’s sleep.

Selling a full array of sleep accessories also boosts your average ticket, increases overall sales and brings people into your store more often because these other items have much shorter replacement cycles than mattresses. In fact, consumers replace their sheets and their pillows rather frequently, every 2.8 years, according to the BSC research.

Bedding Accessories Retailers

Retail stores where consumers typically buy bedding accessories



Where do you typically buy bedding accessories, as as mattress pads, protectors, sheets, pillows, comforters? (N=2000)

Other accessory replacement cycles aren't much longer—just over three years for mattress toppers (3.1 years), mattress protectors and bed covers/decorative pillows (all 3.2 years), and mattress pads and comforters/duvets (all 3.4 years).

Still, as the research shows, too many people go to bed each night without the accessories that retailers know provide real value to consumers—from protectors that help keep a mattress set clean and sanitary (and help maintain the warranty) to linens that can regulate temperatures and make a sleep environment more comfortable.

Virtually all consumers regularly use pillows and sheets and more than half use a mattress pad (52%) but only 25% of BSC survey respondents report using a mattress protector. Or, to look at it another way, many consumers never use mattress toppers (38%), mattress protectors (30%), mattress pads (26%), bed covers/decorative pillows (16%) and comforters/duvets (11%).

These survey results indicate that retailers could do a much more effective job explaining to consumers the value of purchasing a complete sleep ensemble at the same time they buy a new mattress or mattress set. Selecting appropriate accessories—from pillows to protectors to sheets to comforters/duvets—in conjunction maximizes the benefits of all pieces to provide the most comfortable night's sleep possible.

The purchase of a new mattress does prompt some consumers to buy new sleep accessories, too, but the numbers show how much room for growth exists for retailers. Of survey respondents who had purchased a mattress in the past

five years, 32% also bought pillows, 27% purchased mattress protectors, 24% sheets, 24% mattress pads, 17% bed covers/decorative pillows, 17% comforters/duvets and 15% mattress toppers. That means the bulk of mattress buyers are dressing their fresh, clean new beds in old, potentially worn-out pillows, linens, etc. Ick! Worse, some of the old accessories they are putting on their beds actually could interfere with the benefits of their new mattress. Think of a lumpy mattress pad that ruins the feel of a smooth-top foam construction or a too lofty pillow that throws off body alignment.

And this finding should be particularly distressing to retailers who specialize in mattresses but offer a full array of sleep products: When consumers do purchase new accessories, they often do so from a retailer other than the one that sold them the mattress. As one respondent said, "I don't typically buy items for my bed at the same time as my mattress purchase. I like to shop for bed accessories at T.J. Maxx, Ross or Macy's." Another explained, "We would usually buy the mattress protector at the store but look for bedding and pillows elsewhere. We would probably buy the accessories online or at a local shop like Target, Bed Bath & Beyond or Kohl's."

Specifically, 40% of consumers say they "typically" go to a department store for sleep accessories. Other favorite outlets: discount stores (39%), specialty bedding stores (29%), online retailers (24%), local retailers (19%), mattress specialty stores (12%), and furniture stores and warehouse clubs (both 11%). (Respondents could choose more than one response. *Sleep Savvy* typically refers to retailer type in

Bedding Accessories Bought with Mattress Purchase

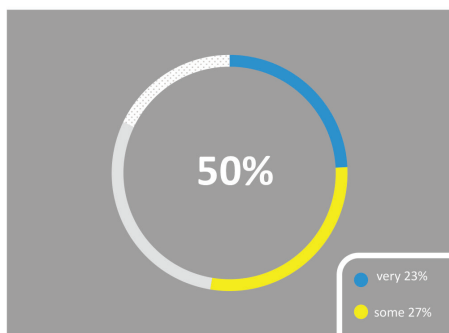
Bedding accessories bought with the last mattress purchase



When you last bought a mattress, what accessories did you purchase with your mattress? (among consumers who bought a mattress in the last 5 years, N=1100)

Interest in Buying Accessories at Mattress Store

One in two respondents is interested in buying mattress accessories at the same place as the mattress



How interested would you be in buying bedding accessories — such as mattress pads, protectors, sheets, pillows, comforters — at the same place as mattress? (N=2000)



"We would usually buy the mattress protector at the store but look for bedding and pillows elsewhere. We would probably buy the accessories online or at a local shop like Target, Bed Bath and Beyond or Kohl's. I do like to be able to look at different options before buying so Kohl's is always a great place to be able to see it in person." - Erin

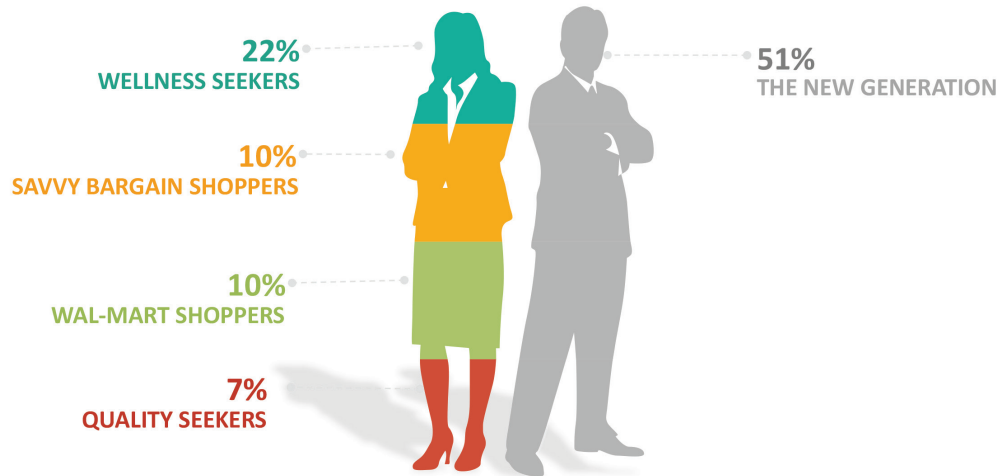
slightly different ways than the survey does.)

That said, half of consumers are open to the idea of buying their accessories from the same retailer that sells

them a mattress (23% very interested; 27% somewhat interested). Looking to boost your sales and better serve your customers? We'll say it again: Here's your opportunity.

Consumer Segment

We have identified five segments of consumers in their relationship to sleep products



There is no one ‘consumer’

Of course, “consumers” is not a monolithic group. To help the mattress industry better understand today’s consumers, Fluent Research identified from the research sample five key consumer segments, specifically linked to their mattress purchasing attitudes and behaviors.

1. Wellness Seekers (22%)

If you specialize in high-end bedding or are a traditional retailer, this group is a prime target for you. Described by Fluent also as “Tennis Moms,” these consumers have good incomes (most earning more than \$50,000 a year), are older and are focused on health. They understand the importance of eating well, exercising regularly and getting a good night’s sleep. Importantly for retailers, these consumers are most likely to value a mattress for its comfort, support and sleep/health benefits—and are willing to pay for those benefits. Of all consumers, those in this group pegged the price of a mattress set highest, at \$1,100. When Wellness Seekers go to shop for a new bed, they are most likely to visit traditional brick-and-mortar stores.

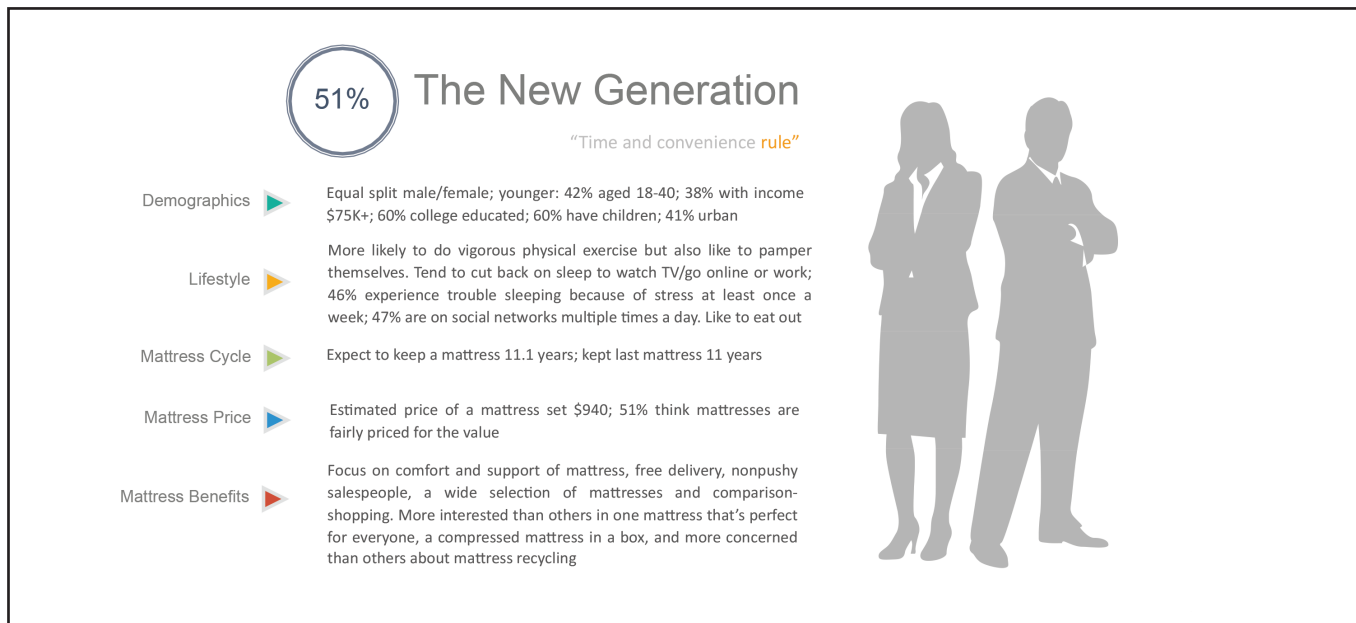
2. Quality Seekers (7%)

This millennial group is the smallest cohort identified among survey respondents but it can be an appealing one for certain retailers because of their penchant for higher end bedding products and interest in e-commerce. Quality Seekers, Fluent says, “appreciate quality and expect to pay

for it.” Like the Wellness Seekers, they have good incomes, as well as high education levels. Among all the groups, Quality Seekers are least concerned about price, sales and free delivery. They estimate the price of a quality mattress set at \$1,080. Quality Seekers are looking for a mattress that provides comfort and support, and expect good customer service. Quality Seekers are more likely than other groups to shop online and “like the idea of a mattress in a box,” Fluent writes in a report accompanying the research results.

3. The New Generation (51%)

This largest consumer group is, in many ways, also the most intriguing. Fluent describes the New Generation as “millennials who are too young and busy to have solidified their attitudes toward mattresses,” giving mattress retailers an opportunity to shape their beliefs and habits. New Generation consumers spend more time on social media and, not surprisingly, “are pushing the online front,” valuing attractive, user-friendly websites and online chat support, Fluent says. In an interesting contradiction, these consumers are more interested in shopping online than members of other groups but also want to support local retailers. When they shop in-store, they want “nonpushy” RSAs. Regardless of where they shop, they like free delivery, are interested in boxed mattresses and support mattress recycling. These consumers estimate the price of a mattress set at \$940 and the majority think mattresses are fairly priced in terms of value.



4. Wal-Mart Shoppers (10%)

Wal-Mart Shoppers and a similar group that Fluent calls Savvy Bargain Shoppers (which together represent one in five consumers) present opportunities for retailers who offer a good selection of promotionally priced and mid-priced products. Wal-Mart Shoppers, it's no surprise, are "no-frills" consumers. When they are in the market for a mattress, they focus primarily on price and are most likely to see their bedrooms as simply a place to sleep. Wal-Mart Shoppers estimate the price of a new mattress at \$900 (the lowest of any group) and expect to keep a mattress 11.2

years (longer than any other group). This group is least interested in the health benefits that mattresses provide. Wal-Mart Shoppers tend to be middle-age, live primarily in suburban and rural areas, and have lower incomes.

5. Savvy Bargain Shoppers (10%)

"These are your aging Soccer Moms. Demographically, they are quite similar to the Wal-Mart Shoppers, but are more likely to be married and a little older," Fluent writes. When shopping for a mattress, these consumers focus on price, sales and an easy return process. Unlike their Wal-



Mart Shopper counterparts, Savvy Bargain Shoppers are more likely to comparison shop to make sure they are finding the best mattress at the lowest price and expect a new mattress to cost \$960. Notably, more than other groups, this one believes mattresses, in general, are too expensive.

Use this information to target members of at least one of these groups, but don't be limited by their preconceived

ideas. For instance, some of these groups are going to be more intrigued by promotions or sales than others. Once you get members of even those groups into your store or onto your e-commerce site, you can use the opportunity to also pitch the health and wellness benefits of the latest sleep products or to explain the concept of a sleep ensemble. Your business will improve, and they'll sleep better.

SURVEY METHODOLOGY

The 2016 consumer study from the Better Sleep Council, the consumer-education arm of the International Sleep Products Association, uses a combination of quantitative and qualitative methodologies. It was carried out by New York-based Fluent Research and included three phases:

PHASE 1: An online "bulletin board" conducted in December 2015 that included input from 35 consumers recruited from regions across the country. The bulletin board moderator was able to ask questions of the group, as well as of individuals, and the respondents in the group could reply to each other, in addition to the moderator. Respondents posted photos and videos of their bedrooms and sleep sets.

PHASE 2: Shopping ethnographies with 10 consumers who were in the market to purchase a new mattress. Each respondent visited three retailers and documented their experiences using photos and videos, answering survey questions and participating in an open-ended discussion. A few of these shoppers ended up purchasing a mattress as a result of the experience.

PHASE 3: The final phase was an online survey of 2,000 consumers nationwide. The sample was representative of the overall U.S. population of adults (ages 18+) but was screened to include consumers who participate in decision-making when it comes to mattress purchases.



Industry efforts to shift consumer attitudes pay off

THE LATEST CONSUMER RESEARCH FROM THE Better Sleep Council is part of a long-term effort begun in 1996 to track and better understand consumers' attitudes about sleep, their mattresses and mattress shopping. The idea was that, armed with information from periodic quantitative and qualitative studies, the mattress industry could more finely tune its strategies and messaging to better educate consumers about the vital role the mattress plays in health and wellness, the importance of a quality mattress to a good night's sleep and the need to regularly replace a mattress.

So it is exciting that one of the key takeaways from the 2016 research is that the mattress industry has had real, measurable success in its consumer-education efforts over the past 20 years. (Pat yourself on the back!)

Perhaps most significantly, industry efforts led by the BSC, as well as individual campaigns by mattress makers, retailers and the health community to increase awareness among consumers about the sleep-health-mattress connection, have pushed the mattress replacement cycle below 10 years after being stuck stubbornly above that marker for decades.

According to the 2016 research, consumers now expect a mattress to last, on average, for 9.4 years. That's down from the 10.9 years cited by consumers in 2007, the last time such research was conducted. The actual mattress replacement cycle also is compressing. In 2007, consumers reported holding onto their last mattress 10.3 years before replacing it with their current sleep set. Today, that time frame is down to a median of 8.9 years.

With each round of the qualitative and quantitative research, key questions are repeated to allow for comparisons over time and additional information is sought to account for new bedding products and technologies, shopping channels and product research options. For instance, the most recent study included many new questions about topics such as adjustable bases, accessories and social media. We hope you'll use the latest results to fine-tune your own marketing messages and consumer-education efforts. ○



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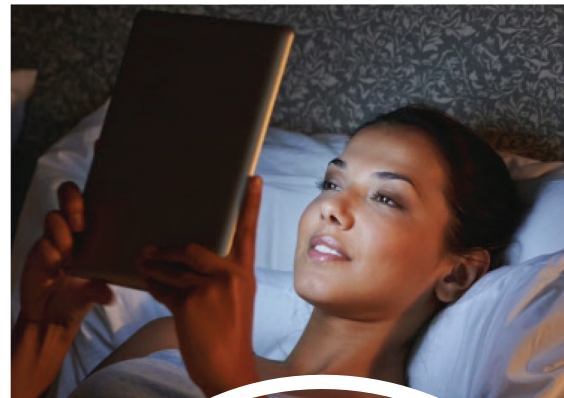


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