



Sustainability and the Mattress Experience

Consumers' and Retailers' Perspectives

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Background and Objectives

- Since 1996, the Better Sleep Council has conducted research to understand and track changes in consumer attitudes towards sleep and health, and their mattress purchasing decision-making.
- The overarching objective of the research has been to inform the communication strategy of the industry, to educate consumers about the health benefits of sleeping on a quality mattress and the importance of regular mattress replacement.
- The current research examines consumers' and retailers' understanding of and attitudes towards sustainability in relation to mattresses and other product categories.

Methodology

Retailers:

- Survey conducted online in July-August 2023
- 139 respondents
- Participants were recruited from lists provided by ISPA (e.g., ISPA members, Sleep Savvy subscribers, etc.) and met the following qualifications:
 - US residents, 18+ years of age
 - Currently employed in the mattress retail industry and employer sells mattresses

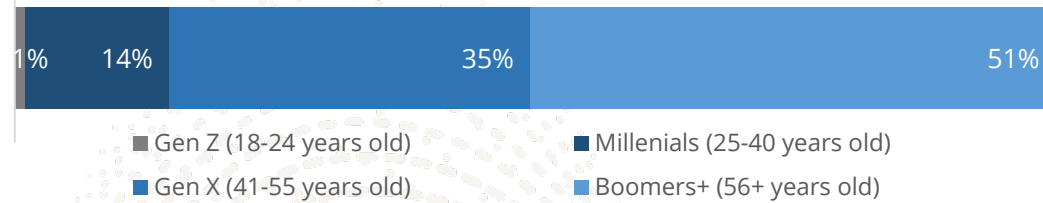
Consumers:

- Survey conducted online in July 2023
- National sample
- 1,006 respondents
- Participants met the following qualifications:
 - US residents, 18+ years of age
 - Participates in mattress purchase decisions
 - Not employed by a furniture, mattress, or bedding manufacturer/ distributor/ designer/ major retailer, or in market research, advertising, or public relations

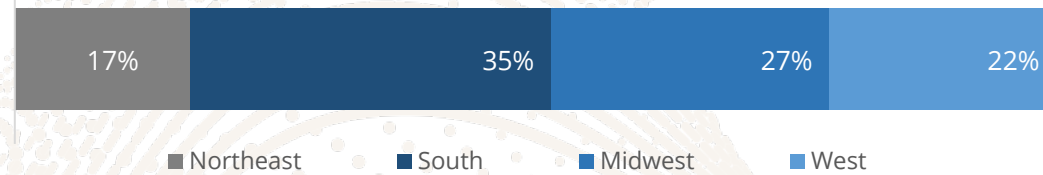
Sample Overview

RETAILERS

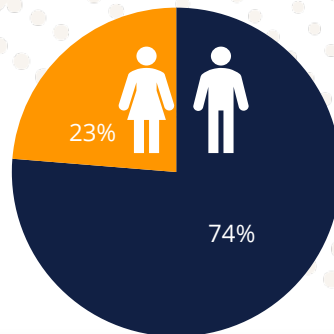
AGE



REGION

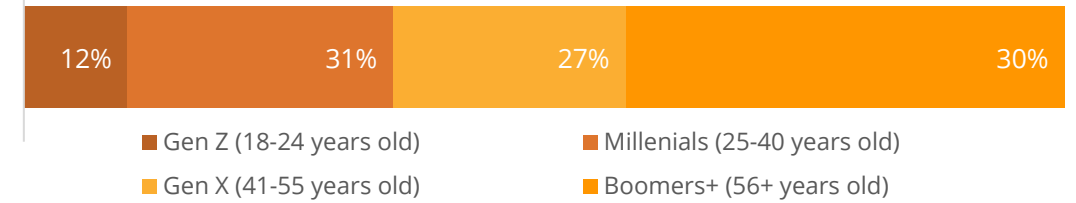


GENDER

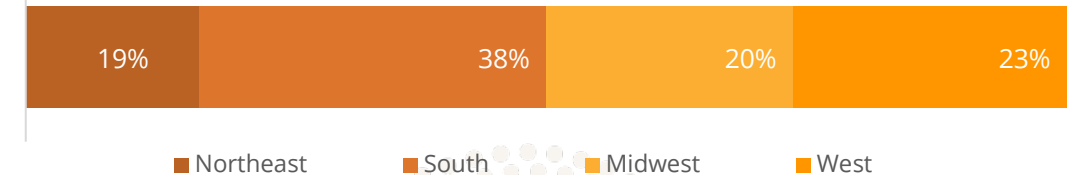


CONSUMERS

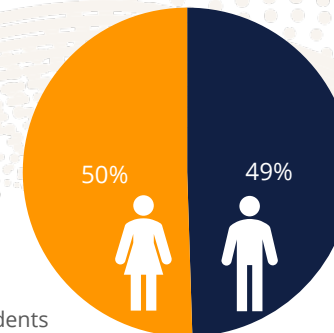
AGE



REGION



GENDER

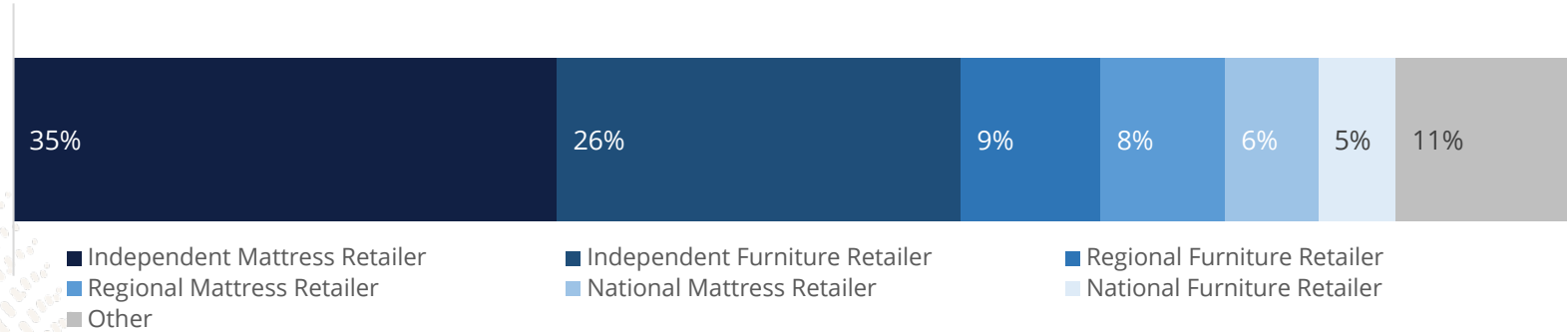


See Appendix for a more detailed demographic profile of retailer and consumer respondents

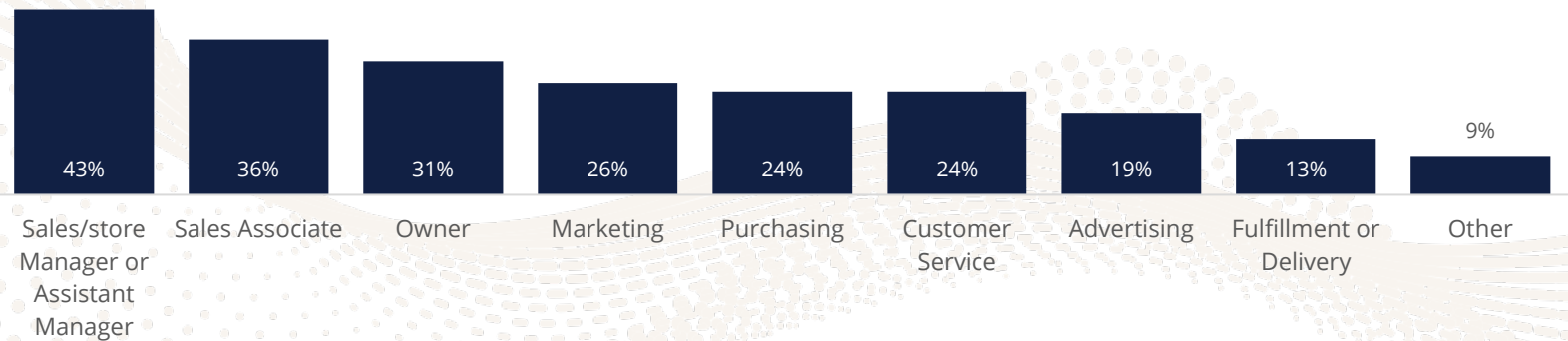
Sample Overview

RETAILER JOB CHARACTERISTICS

STORE TYPE



JOB RESPONSIBILITIES



See Appendix for a more detailed demographic profile of retailer and consumer respondents

Key Findings

- **Awareness of sustainability is widespread, but familiarity with and actions based on sustainability are more common among Gen Z and Millennials. Mattress retailers expect consumer demand for sustainability will increase.**
 - Nearly all consumers say they are aware of the concept of environmental sustainability, including 35% who are highly familiar with the concept.
 - Gen Z and Millennials are more likely than older generations to be highly familiar with environmental sustainability and to frequently choose or pay more for a product because a company uses environmentally sustainability practices or materials.
 - The majority of retailers surveyed believe consumer demand for mattresses made with environmentally sustainable practices and materials will increase in the next five years.
- **Half of consumers say that having mattresses made using sustainable materials would be a highly important factor in influencing their decision to buy from a particular retailer.**
 - One-third of consumers say that a company's use of sustainability practices or materials has a large influence on their decision to purchase a mattress or mattress set, comparable to other durable and/or large purchases, such as furniture or large appliances.
 - Two in 10 retailers surveyed say that the mattress being produced using environmentally sustainable practices or materials is highly important to a consumer's purchasing decision.

Key Findings

- **Durability is the sustainability characteristic that is most important to consumers when purchasing a mattress and is also the type of sustainability information that is most likely to be provided to them when mattress shopping.**
 - Nearly half of recent mattress purchasers report that information was provided to them about the mattress' durability, while one-quarter or fewer said that the store or retailer provided information about minimal or no harmful chemicals, labeled as responsibly sourced, or made from natural or recycled materials.
- **Retailers' offerings include sustainably-produced mattresses, but sustainability currently does not have a large influence on the selection of product offerings.**
 - Most retailers surveyed say that at least some of the mattresses their company offers are made with environmentally sustainable practices or materials
 - However, nearly half of retailers involved in mattress-selection decisions believe that sustainability has very little or no influence on their company's decision to sell a particular mattress. For those who say that sustainability has any influence, the top aspects that they look for are made from natural materials or a renewable resource and free from harmful chemicals or minimal chemical usage.

Key Findings

- **Most retailers surveyed report that their company actively promotes sustainability as a feature of their mattress products or services at least a little, although only 12% say they do this to a large extent.**
 - The top aspects promoted include free from harmful chemicals, made from natural materials or renewable resources, and is durable.
 - The most common methods of promotion are conversations between consumers and associates and certifications from independent organizations.
- **Consumers emphasize the importance of in-store materials and knowledgeable salespeople in informing them about sustainability while mattress shopping.**
 - When searching for a mattress, consumers are most likely to say that more informative in-store materials about sustainability would be helpful in improving how they are informed about this feature, followed by more knowledgeable sales associates.
 - However, recent mattress purchasers report that sustainability information was more likely to be provided on the brand or retailer website than through in-store materials or conversations with sales associates.

Key Findings

- **Retailers surveyed say that they tend to initiate conversations about sustainability on the infrequent occasions that the topic is mentioned in discussions with consumers. Most retailers do not feel highly knowledgeable about sustainability or highly prepared to talk to consumers about it.**
 - The majority of retailers surveyed say environmental sustainability is never or hardly ever mentioned in conversations with consumers; when the topic does come up, a majority of retailers say they are the initiators of those conversations.
 - Only one-quarter of retailers surveyed consider themselves to be extremely or very knowledgeable about environmental sustainability practices and materials related to mattresses.
 - The majority of retailers surveyed do not feel very or extremely prepared to talk to consumers about environmental sustainability regarding mattresses.
 - Retailers surveyed are most likely to say that educational materials provided by the mattress manufacturer would be helpful in improving their preparedness to talk with consumers about sustainability.
- **Consumers support mattress recycling, with the majority saying it is highly important to do so when a mattress reaches the end of its useful life.**
 - Opportunity exists to educate and bridge the knowledge gap among consumers, as fewer than 1 in 10 know that more than 75% of a mattress' materials can be recycled. Most believe that less than half of a mattress' materials are recyclable.



Detailed Findings



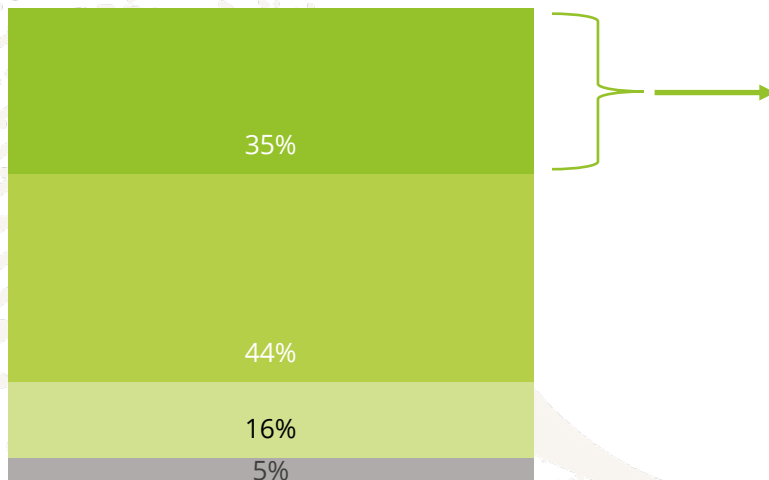
Sustainability Awareness, Attitudes & Practices

CONSUMER AND RETAILER PERSPECTIVES

One-third of US adults say they are highly familiar with the concept of sustainability; Gen Z and Millennial adults are more familiar than older adults with the concept

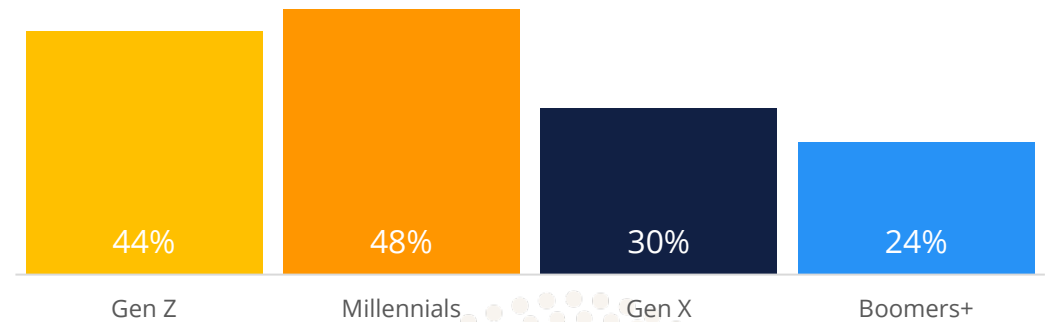
Half of mattress retailers surveyed say they are highly familiar with the concept of sustainability.

Prior to this survey, how familiar were you with the concept of environmental sustainability?



- Never heard of before this survey
- Somewhat familiar
- Just know the name
- Extremely/Very Familiar

Familiarity with the Concept of Sustainability
% Extremely/Very Familiar



50%

of mattress retailers surveyed consider themselves extremely/very familiar with the concept of environmental sustainability

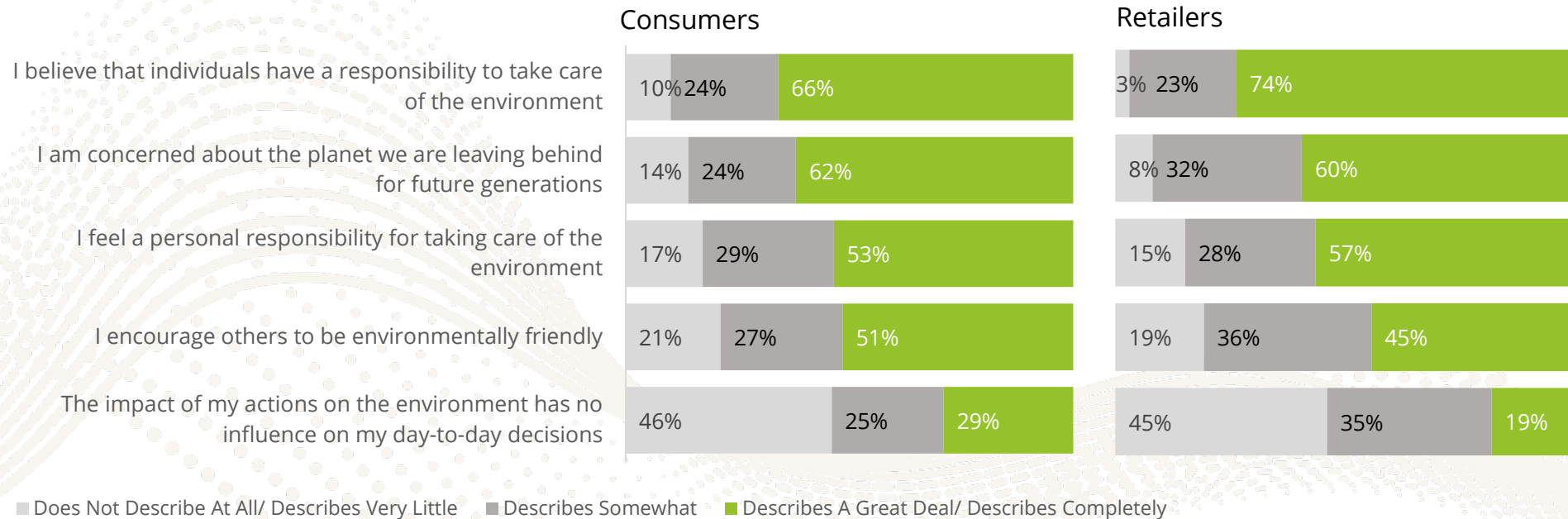
C-Q45. Prior to this survey, how familiar were you with the concept of sustainability? (Base: All Qualified Respondents; N=1006)

R-Q38. Prior to this survey, how familiar were you with the concept of environmental sustainability? (Base: All Qualified Respondents; N=139)

Consumers are concerned about the future of the planet and believe individuals—including themselves—have a responsibility to take care of the environment

Retailers' perspectives are similar to those of consumers.

To what extent does each of the following describe you?

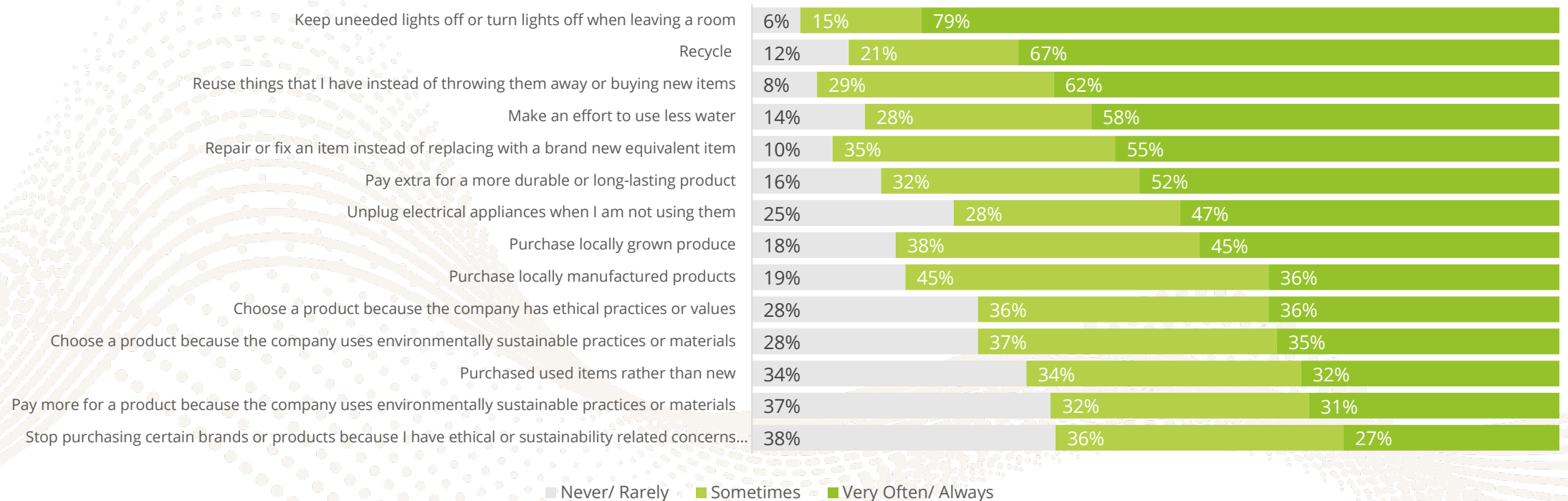


C-Q20. To what extent does each of the following describe you? (Base: All Qualified Respondents; N=1006)

R-Q30. To what extent does each of the following describe you? (Base: All Qualified Respondents; N=139)

The most common sustainability practices consumers engage in daily are keeping unneeded lights off, recycling, and reusing items instead of discarding or purchasing new items

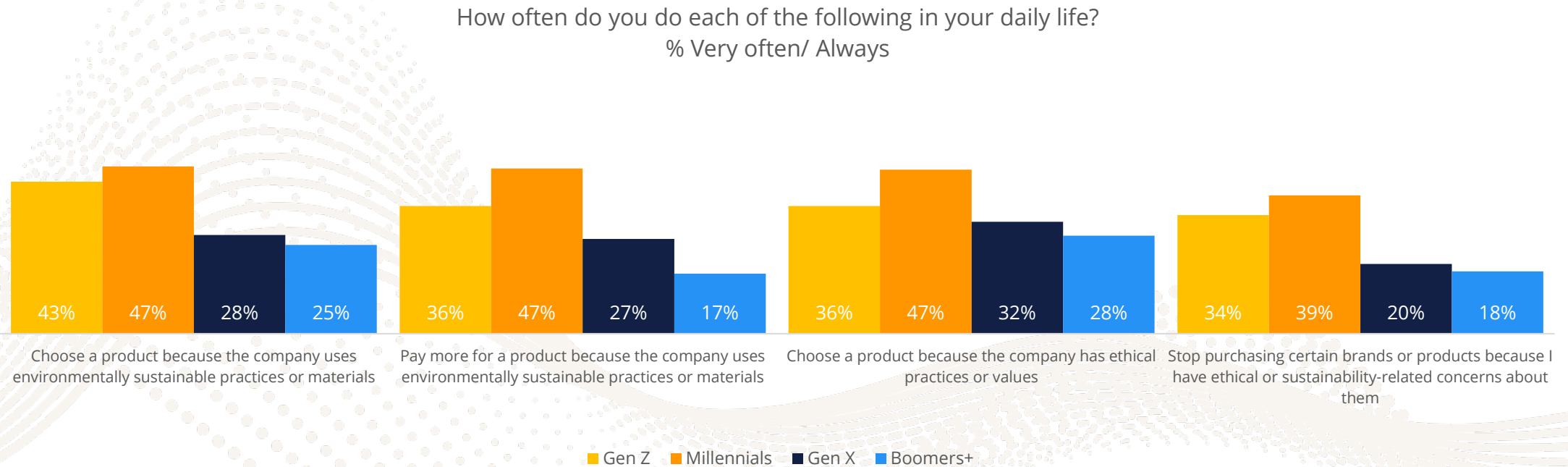
How often do you do each of the following in your daily life?



C-Q25. How often do you do each of the following in your daily life? (Base: All Qualified Respondents; N=1006)

Gen Z and Millennials are more likely to choose a product due to a company's use of environmentally sustainable practices or materials

Younger generations tend to engage more frequently in several sustainability practices than do Gen X and Boomers

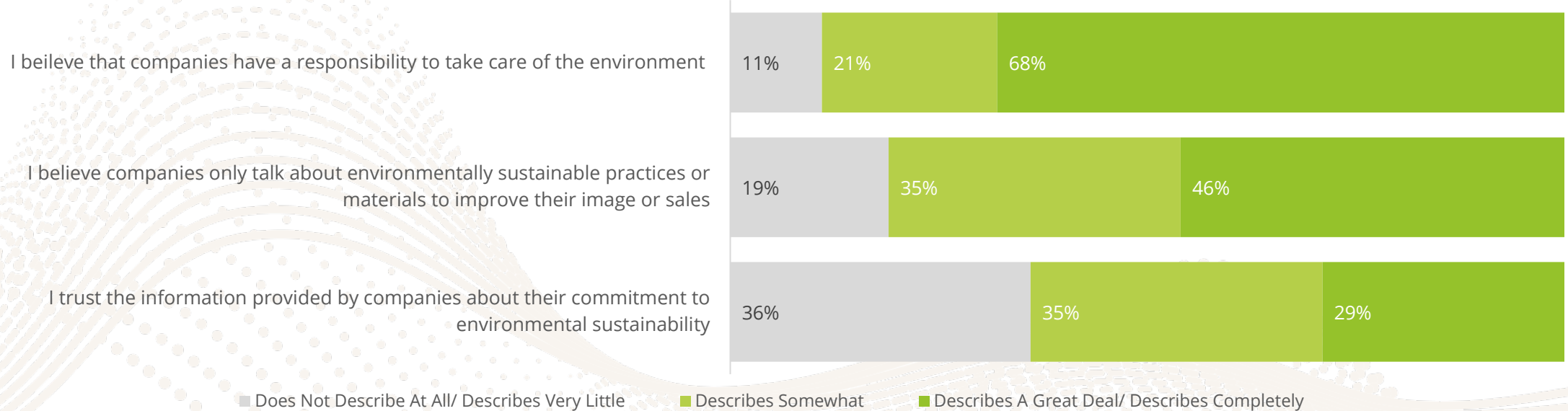


C-Q25. How often do you do each of the following in your daily life? (Base: All Qualified Respondents; N=1006)

Nearly 7 in 10 consumers believe companies have a responsibility to take care of the environment, whereas only 3 in 10 consider the information provided by companies about their commitment to environmental sustainability to be trustworthy

Boomers are less likely than others to believe that companies only talk about sustainability to improve their image and less likely to trust the information provided by companies about their commitment to sustainability

To what extent does each of the following describe you?

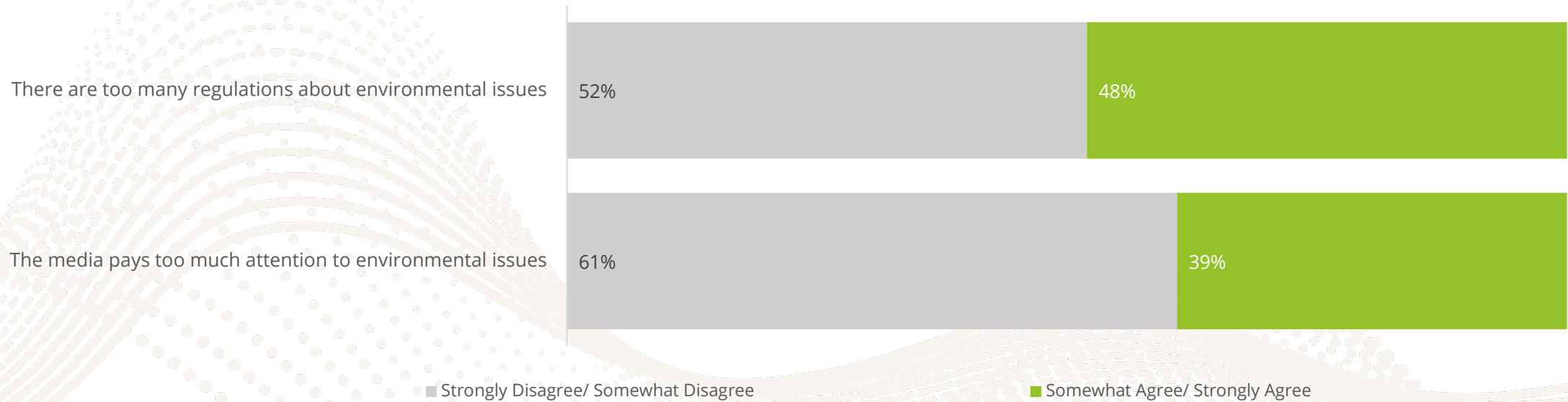


C-Q20. Next, we'd like to ask you a few questions about your views. To what extent does each of the following describe you? (Base: All Qualified Respondents; N=1006)

The majority of consumers do not believe media coverage on environmental issues is excessive; however nearly half believe there are too many regulations about environmental issues

Millennials are the most likely to say the media pays too much attention to environmental issues and that there are too many government regulations about environmental issues

Please indicate how much you agree or disagree with the following statements

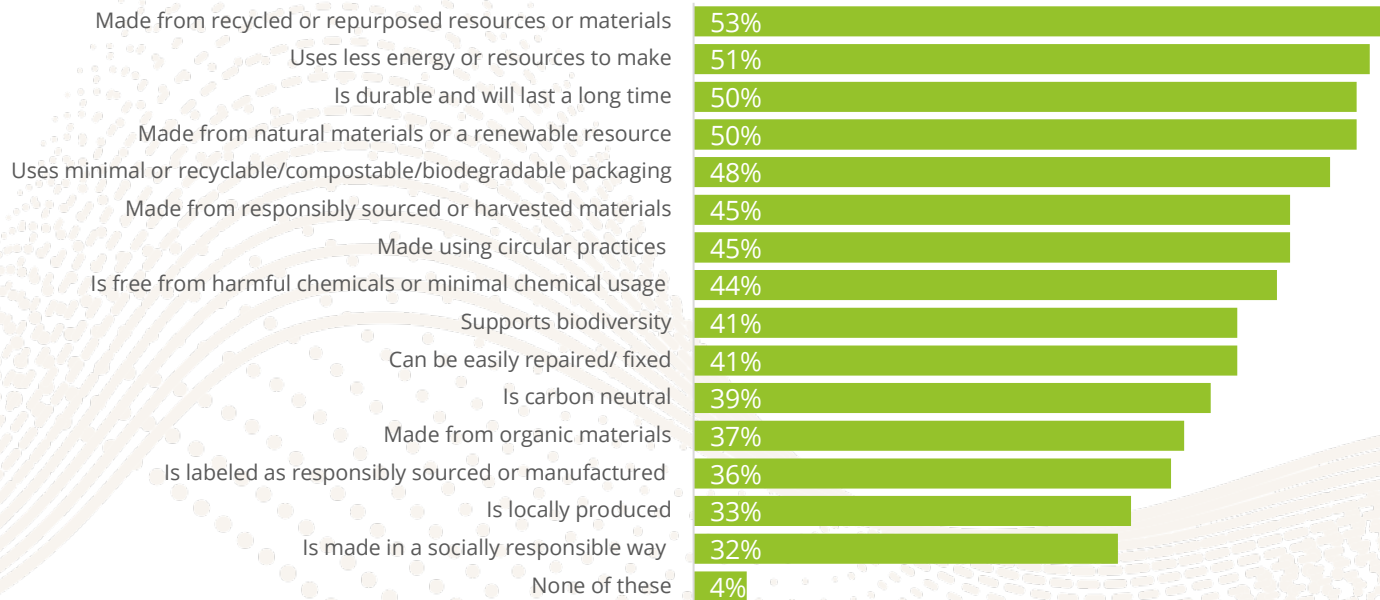


C-Q40. Please indicate how much you agree or disagree with each of the following statements. (Base: All Qualified Respondents; N=1006)

Both consumers and retailers are most likely to say a product is sustainable if it is made from recycled or repurposed resources or materials

Durability is among the top characteristics of sustainability among consumers, but not retailers. "Free from harmful chemicals" is among the top characteristics among retailers, but not consumers.

Which of the following, if any, do you think makes a product "sustainable"?



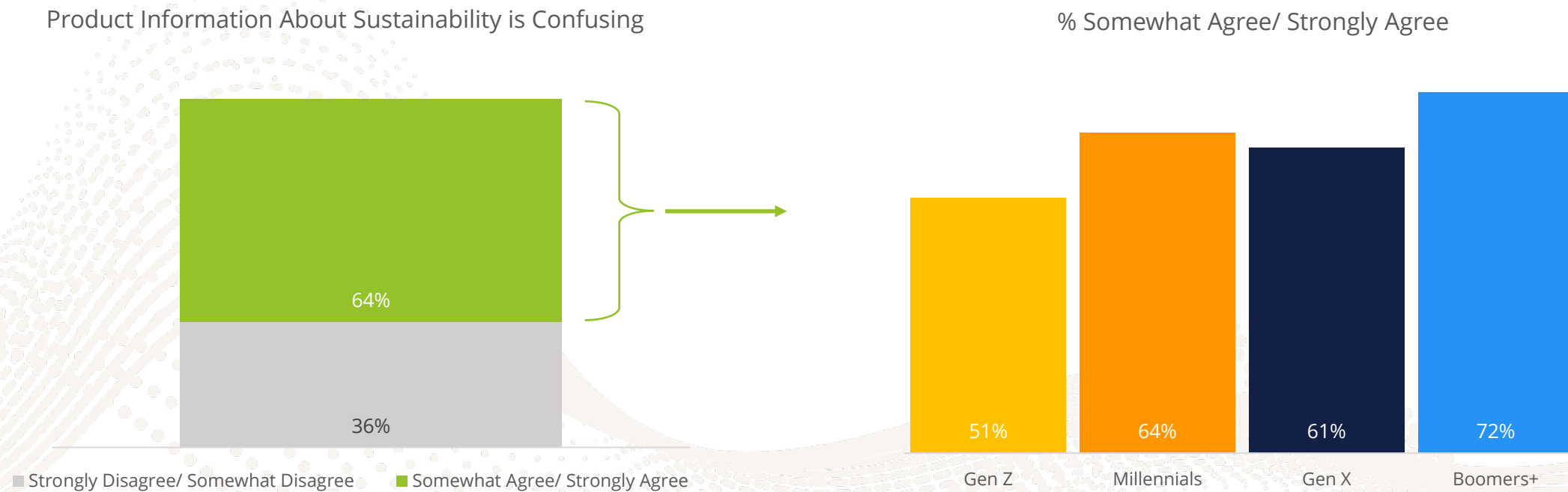
Retailers' perspective (top 5 characteristics)

- Made from recycled or repurposed materials (75%)
- Made from natural materials or a renewable resource (74%)
- Is free from harmful chemicals or minimal chemical usage (62%)
- Made from responsibly sourced or harvested materials (59%)
- Uses less energy or resources to make (58%)

C-Q30. Which of the following, if any, do you think makes a product "sustainable"? (Base: All Qualified Respondents; N=1006)

R-Q32. Which of the following, if any, do you think makes a product "sustainable"? (Base: All Qualified Respondents; N=139)

The majority of consumers believe product information about sustainability is confusing, with Gen Z finding it the least confusing and Boomers+ finding it the most confusing.



C-Q40. Please indicate how much you agree or disagree with each of the following statements. (Base: All Qualified Respondents; N=1006)

Nearly half of consumers believe doing their own research is the most helpful in determining if a product is environmentally sustainable

Consumers are least likely to consider advertising from the brand or retailer to be most helpful in determining a product's sustainability.

Which of the following sources do you consider most helpful in determining whether a product is made using environmentally sustainable practices or materials?



C-Q32. Which of the following sources do you consider most helpful in determining whether a product is made using environmentally sustainable practices or materials? Please select all that apply. (Base: All Qualified Respondents; N=1006)

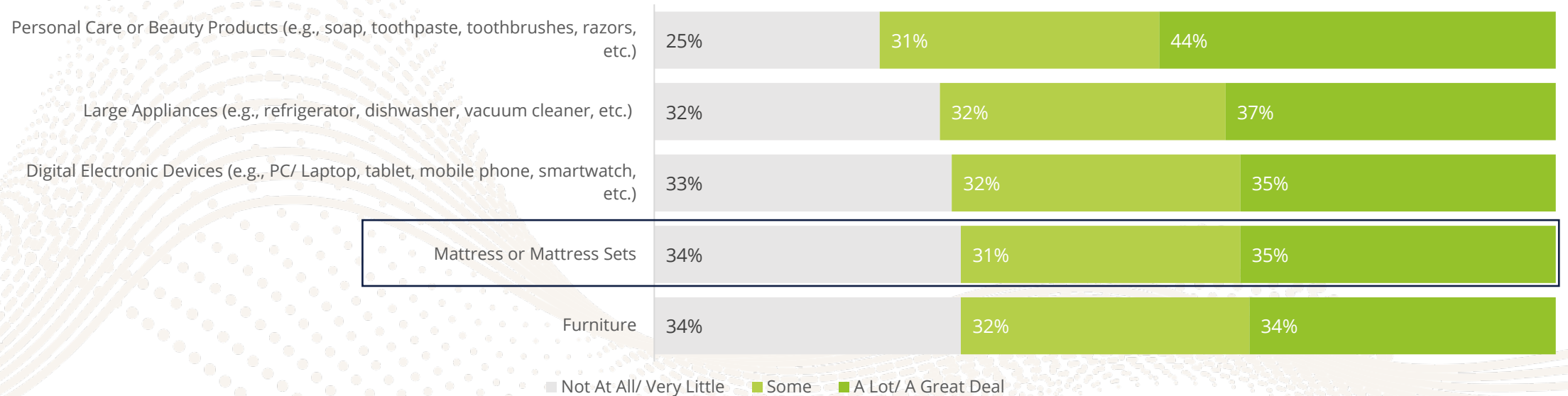


Sustainability and Purchase Decisions for Mattresses

CONSUMER PERSPECTIVES

Product category plays a role in the extent that a company’s use of environmentally sustainable practices or materials influences consumers’ purchase decisions, with sustainability having a larger impact on personal care or beauty product purchases than for more durable products, including mattresses

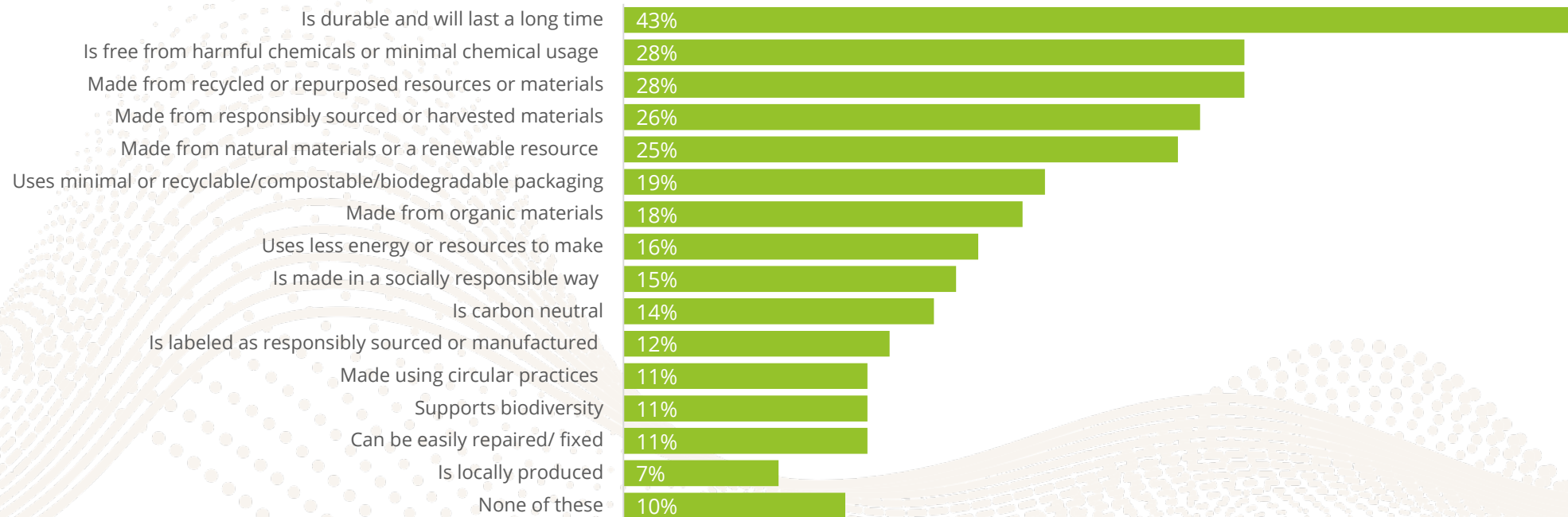
To what extent does a company’s use of environmentally sustainable practices or materials influence your decision to purchase each of the following?



C-Q50. To what extent does a company’s use of environmentally sustainable practices or materials influence your decision to purchase each of the following? (Base: All Qualified Respondents; N=1006)

Consumers prioritize durability more than other sustainability characteristics when considering purchasing a mattress or mattress set

Which of these are important characteristics when you consider purchasing a mattress or mattress set?



C-Q55. Which of these are important characteristics when you consider purchasing a product in the following categories? Please select all that apply. (Base: All Qualified Respondents; N=1006)

Durability is the most important sustainability characteristic for mattresses, furniture, appliances and digital devices

Sustainability characteristics of most importance for personal care products are natural, organic, responsibly sourced materials.

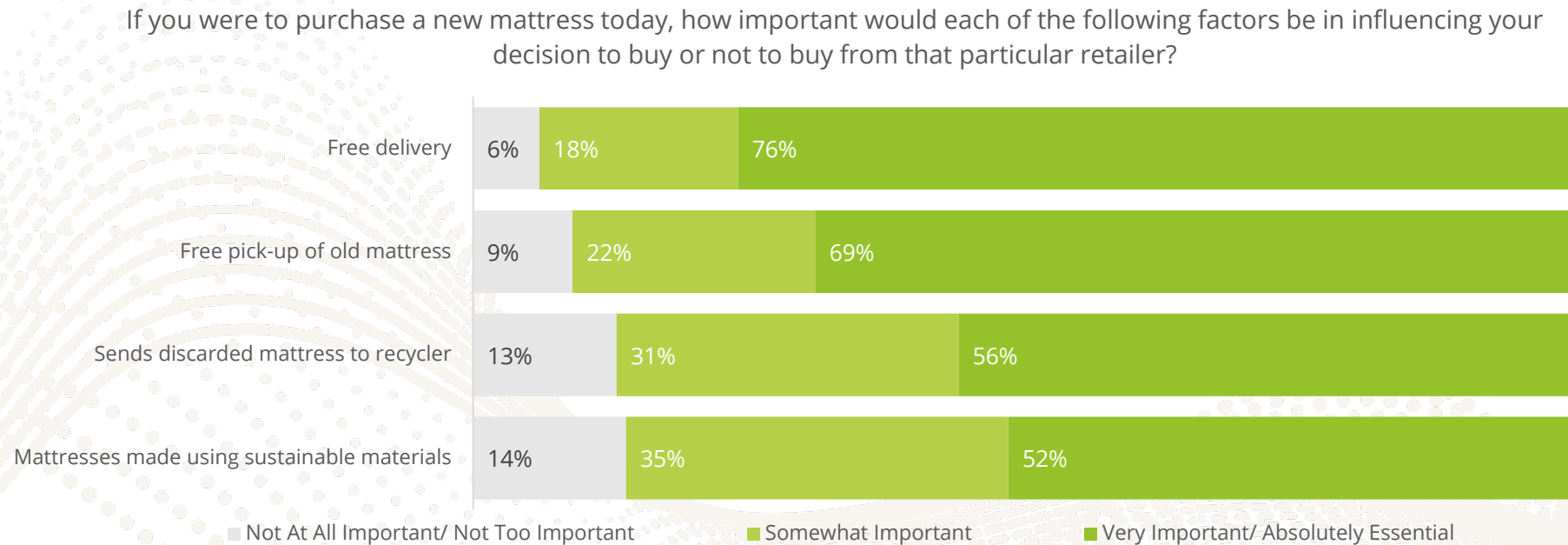
Top 5 Most Important Characteristics by Product Type

Mattress or Mattress Sets	Furniture	Digital Electronic Devices (e.g., PC/laptop, tablet, mobile device, etc.)	Large Appliances (e.g., refrigerator, dishwasher, etc.)	Personal Care or Beauty Products (e.g., soap, toothpaste, razors, etc.)
Is durable and will last a long time (43%)	Is durable and will last a long time (44%)	Is durable and will last a long time (45%)	Is durable and will last a long time (46%)	Made from natural materials or a renewable resource (37%)
Is free from harmful chemicals or minimal chemical usage (28%)	Made from recycled or repurposed resources or materials (32%)	Can be easily repaired/fixed (34%)	Can be easily repaired/fixed (36%)	Is free from harmful chemicals or minimal chemical usage (36%)
Made from recycled or repurposed resources or materials (28%)	Made from responsibly sourced or harvested materials (32%)	Made from recycled or repurposed resources or materials (29%)	Uses less energy or resources to make (29%)	Made from organic materials (31%)
Made from responsibly sourced or harvested materials (26%)	Made from natural materials or a renewable resource (26%)	Uses less energy or resources to make (26%)	Made from recycled or repurposed resources or materials (29%)	Made from responsibly sourced or harvested materials (28%)
Made from natural materials or a renewable resource (25%)	Can be easily repaired/fixed (25%)	Uses minimal or recyclable/compostable/ biodegradable packaging (21%)	Is free from harmful chemicals or minimal chemical usage (22%)	Made from recycled or repurposed resources or materials (22%)

C-Q55. Which of these are important characteristics when you consider purchasing a product in the following categories? Please select all that apply. (Base: All Qualified Respondents; N=1006)

Half of consumers say that having mattresses made using sustainable materials would be a highly important factor in influencing their decision to buy from a particular retailer

Consumers consider free delivery and free pick-up of old mattresses to be the most influential factors in deciding whether to purchase from a particular retailer.



C-Q150. If you were to purchase a new mattress today, how important would each of the following factors be in influencing your decision to buy or not to buy from that particular retailer? (Base: All Qualified Respondents; N=1006)

Consumers are most likely to say that more informative in-store materials would be helpful in improving how they are informed about sustainability while mattress shopping

In your opinion, which of the following would help improve the information provided about sustainability when searching for a mattress?



C-Q107. In your opinion, which of the following would help improve the information provided about sustainability when searching for a mattress? (Base: Respondents who have ever purchased a mattress; N=947)



Sustainability and the Recent Mattress Purchase Experience

CONSUMER PERSPECTIVES

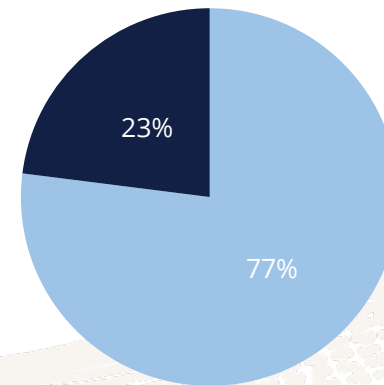
Three out of four consumers who bought a mattress within the past two years bought a replacement mattress, most commonly from a furniture store

Among those who purchased in past 2 years...

37%

of consumers report that they purchased a mattress within the past 2 years.

Was the last mattress you bought a replacement?



■ Yes ■ No

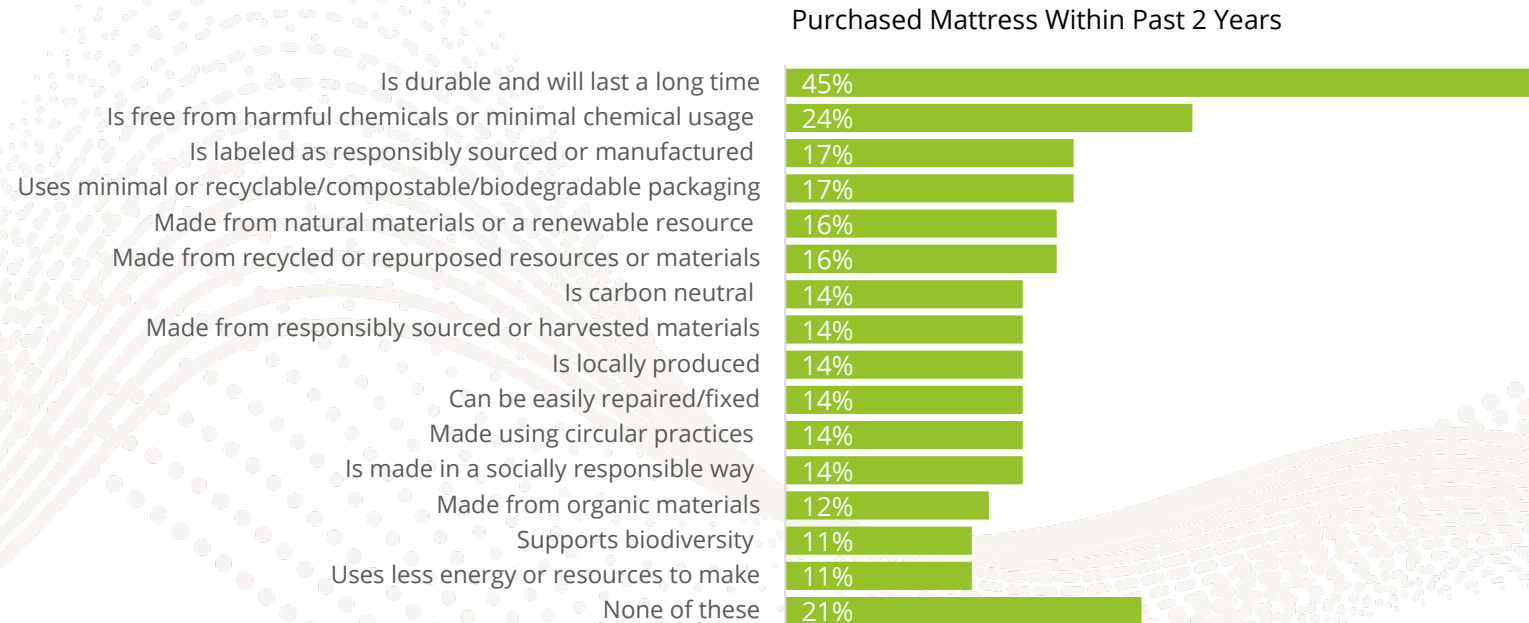
C-Q95. How long ago did you last purchase a mattress either for yourself or for somebody else in your household? (Base: All Qualified Respondents; N=1006)

C-Q97. Was the last mattress you bought a replacement? (Base: Respondents who have purchased a mattress in the last 2 years; N=377)

C-Q100. Thinking about the last mattress you purchased, from which of the following did you purchase the mattress? (Base: Respondents who have purchased a mattress in the last 2 years; N=377)

Eight in 10 recent mattress purchasers report that sustainability information was provided by the store or retailer, most commonly durability, followed by being free from harmful chemicals

Thinking about the last mattress you purchased, which of the following information about sustainability was provided by the store or retailer?



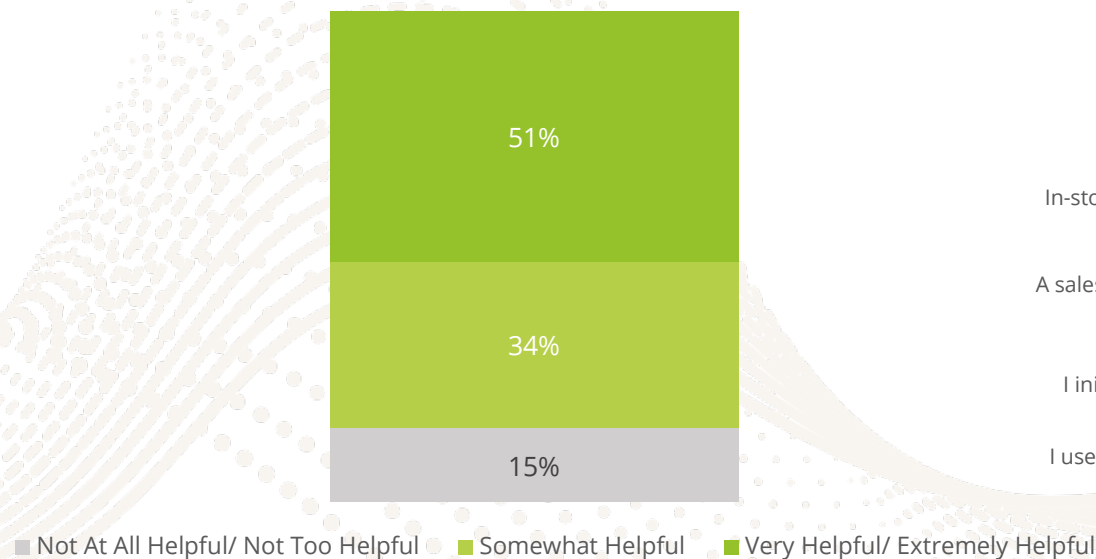
Those who purchased a mattress more than two years ago are nearly twice as likely to say that the retailer did **not** provide any of these types of sustainability information (38% vs 21% of those who purchased within past two years)

C-Q102. Thinking about the last mattress you purchased, which of the following information about sustainability was provided by the store or retailer? (Base: Respondents who have purchased a mattress in past 2 years; N=377)

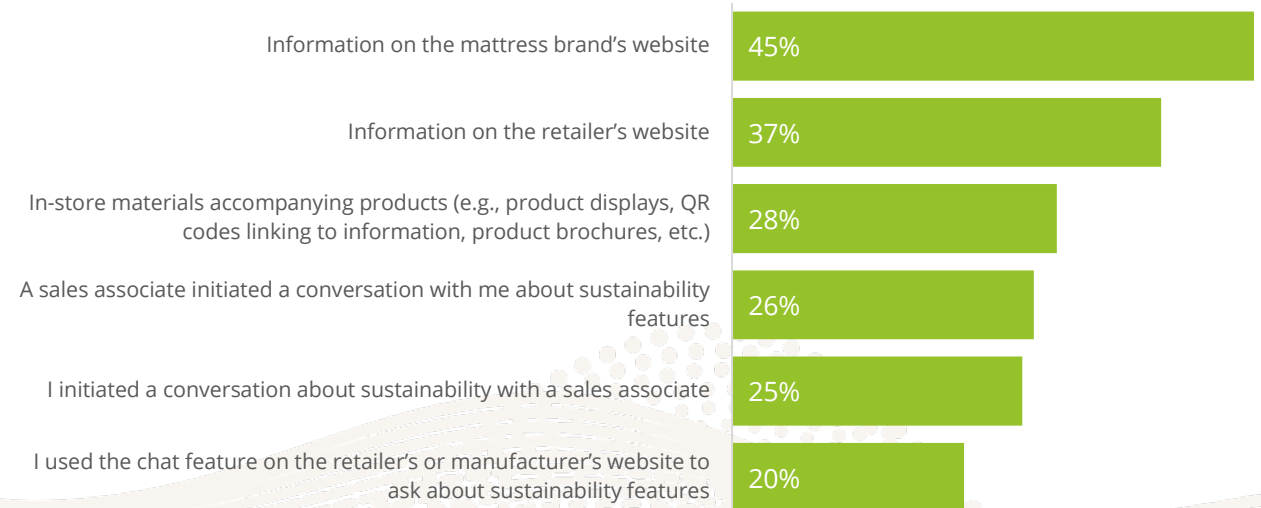
Half of recent mattress purchasers say the information about sustainability provided by the store or retailer was very or extremely helpful in their purchase decision

Nearly half of consumers were provided sustainability information through the mattress brand's website

How helpful in your purchase decision was the information about sustainability provided by the store or retailer?



How did the retailer provide information about sustainability?



C-Q104. How helpful in your purchase decision was the information about sustainability provided by the store or retailer? (Base: Information provided about sustainability & purchased mattress in past two years; N=296)

C-Q105. How did the retailer provide information about sustainability? Please select all that apply. (Base: Information provided about sustainability & purchased mattress in past two years; N=296)



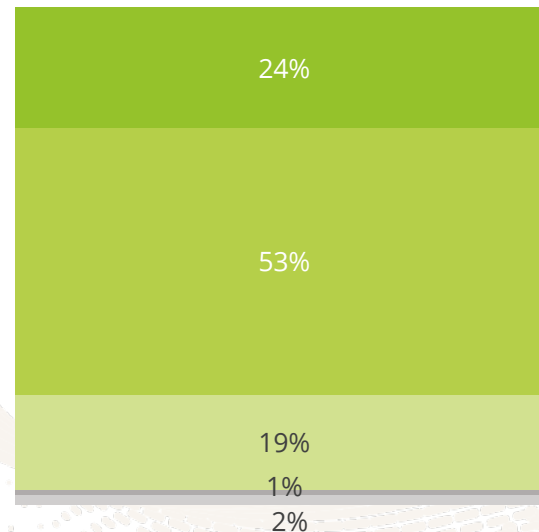
Sustainability and the Retail Perspective

RETAILER PERSPECTIVES

Nearly all retailers surveyed say their company offers mattresses made with environmentally sustainable practices or materials, including one-quarter who say most or all of their mattresses are sustainably-made

How many different mattresses (i.e., SKUs) that your company offers are made with environmentally sustainable practices or materials?

- Most/ All
- Some
- Very few
- None
- Not Sure



77%

of retailers' companies offer some or more mattresses made with environmentally sustainable practices or materials

R-Q60. How many different mattresses (i.e., SKUs) that your company offers are made with environmentally sustainable practices or materials? Your best estimate is fine. (Base: All Qualified Respondents; N=139)

The majority of retailers surveyed are involved in decision-making about which mattress products are sold by their company

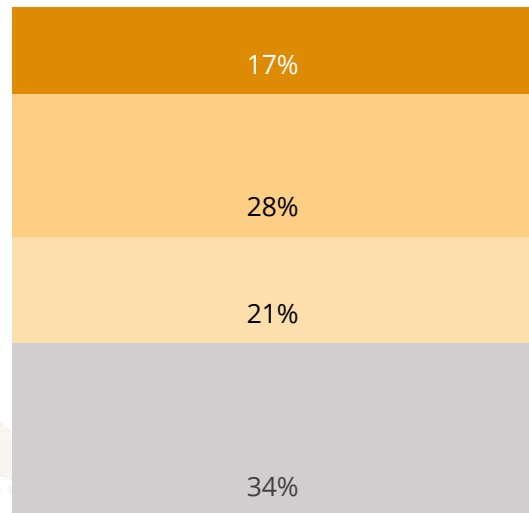
What is your involvement in decisions about which mattress products are sold by your company?

■ I am the sole decision maker

■ I am one of the key decision makers

■ I have influence or participate in the decision-making process

■ I do not participate in decision making



66%

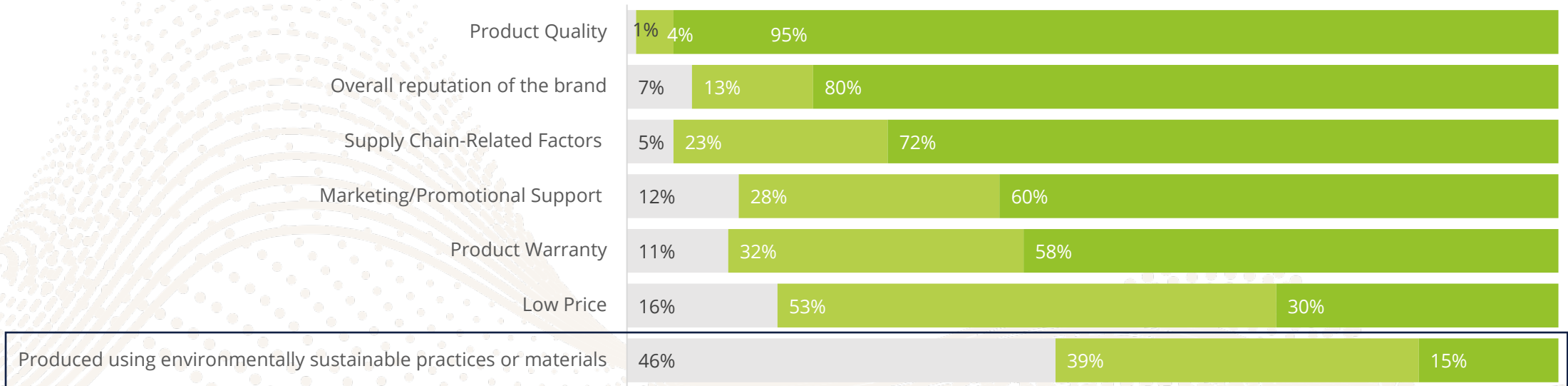
of retailers are involved in the decision-making process

R-Q125. What is your involvement in decisions about which mattress products are sold by your company? (Base: All Qualified Respondents; N=139)

Nearly half of retailers surveyed involved in decisions about the selection of mattress products say that environmental sustainability has very little or no influence on their company's decision to sell a particular mattress

Product quality and the overall reputation of the brand have the largest influence.

To what extent does each of the following factors influence your company's decision to sell a particular mattress?



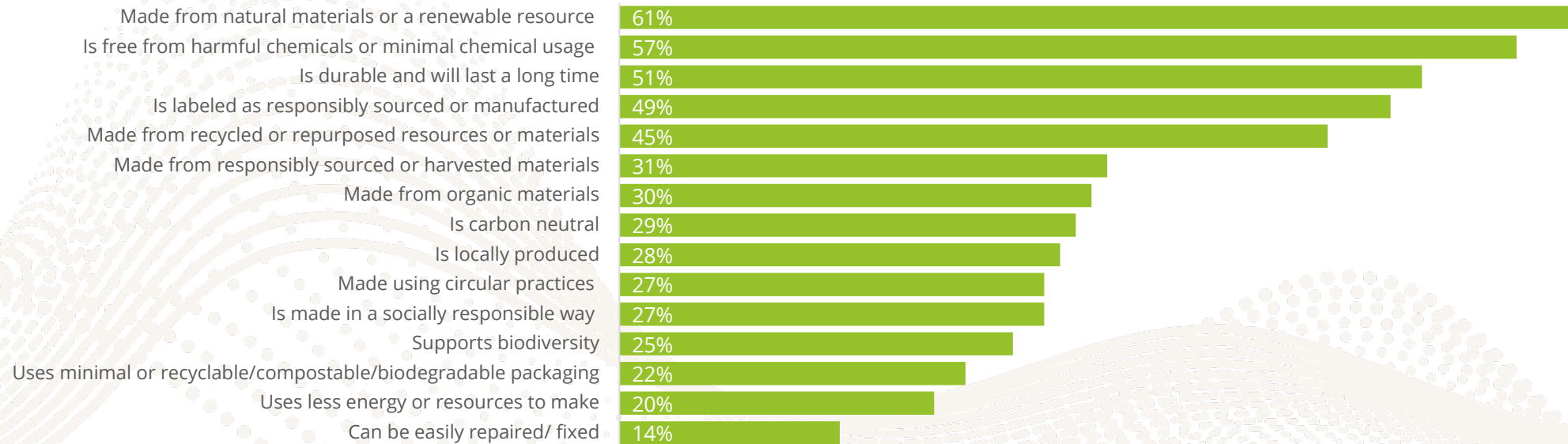
90% of retailers involved in selection decisions say that environmental sustainability has at least a little influence

■ Not At All/ Very little ■ Some ■ A Lot/ A Great Deal

R-Q130. To what extent does each of the following factors influence your company's decision to sell a particular mattress? (Base: Involved in Decision-Making; N=92)

When assessing the sustainability of a mattress, retailers most frequently check if the mattress is made from natural materials or a renewable resource, is free from harmful chemicals, and is durable

When evaluating whether a mattress is produced using environmentally sustainable practices or materials, what information do you look for?

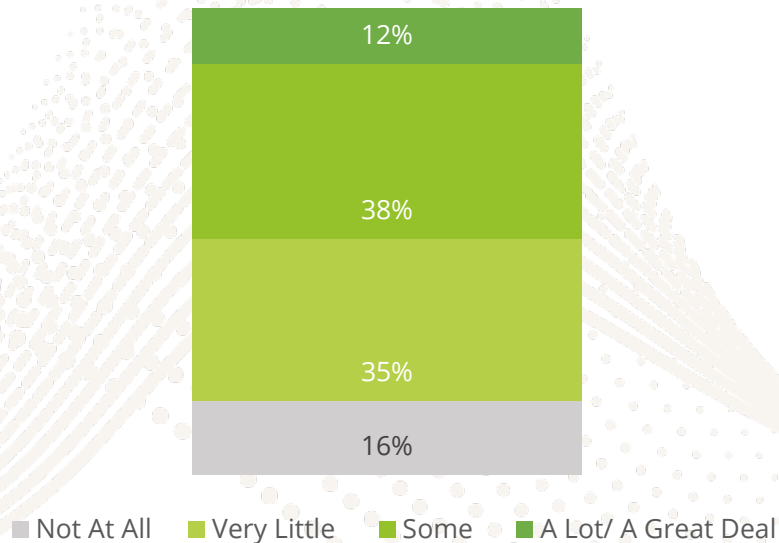


R-Q135. When evaluating whether a mattress is produced using environmentally sustainable practices or materials, what information do you look for? Please select all that apply. (Base: Environmentally Sustainable Practices or Materials Has Influence; N=83)

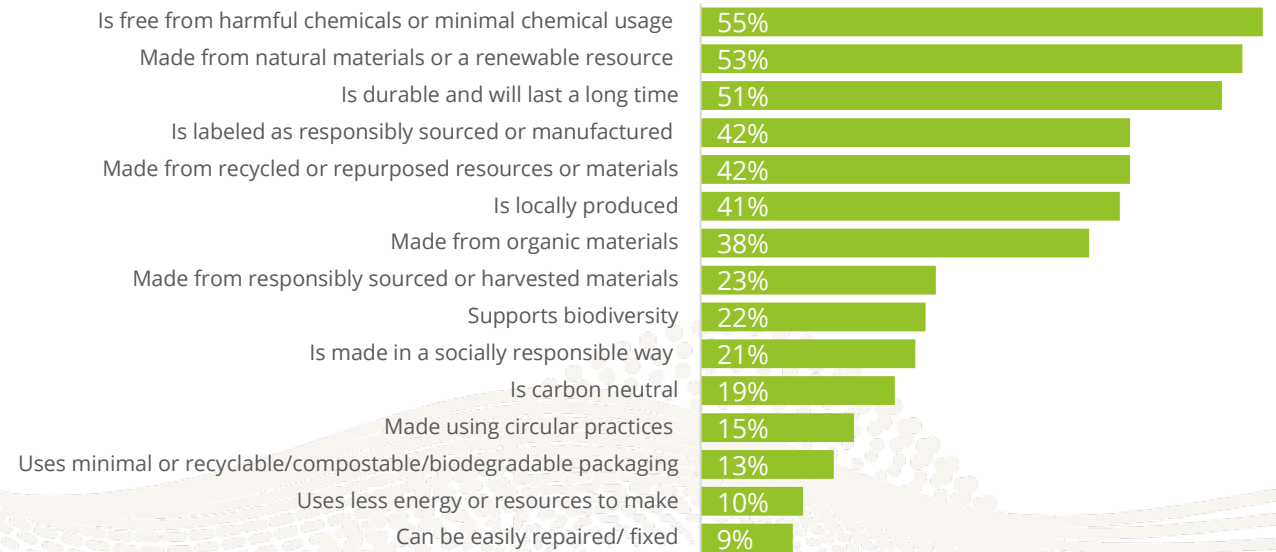
Most retailers surveyed say they actively promote environmental sustainability as a feature or benefit of their mattress products or services at least a little, including 12% who promote sustainability to a large extent

Sustainability features most commonly highlighted are free or minimal harmful chemicals, derived from natural materials, and durability

To what extent does your company actively promote environmental sustainability as a feature and/or benefit of any of your mattress products or services?



Which of the following, if any, does your company promote as environmentally sustainable features of any of its mattress product options?



R-Q95. To what extent does your company actively promote environmental sustainability as a feature and/or benefit of any of your mattress products or services? (Base: All Qualified Respondents' N=139)

R-Q100. Which of the following, if any, does your company promote as environmentally sustainable features of any of its mattress product options? (Select all that apply) (Base: Promotes Environmental Sustainability as a Feature; N=117)

The majority of retailers surveyed whose company promotes sustainability as a feature say their company promotes sustainability features to consumers through conversation and certifications from independent organizations

As previously noted, only 32% of consumers say that certifications from independent organizations would be among the most helpful sources in determining whether a product is sustainable

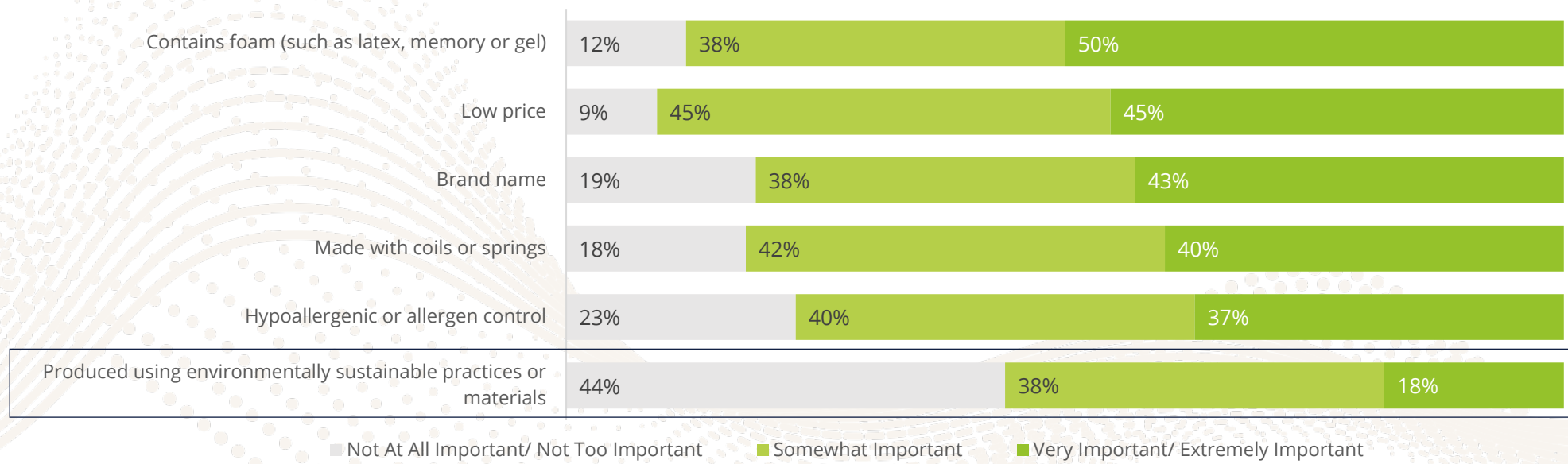
Which of the following does your company use to promote sustainability features to consumers?



R-Q105. Which of the following does your company use to promote sustainability features to consumers? Please select all that apply. (Base: Promotes Environmental Sustainability as a Feature; N=117)

Two in 10 retailers surveyed say that the mattress being produced using environmentally sustainable practices or materials is highly important to a consumer’s purchasing decision—much fewer than believe that foam construction, low price or brand name have an important influence

In your experience, how important is each of the following characteristics in influencing a consumer’s decision to purchase a particular mattress?

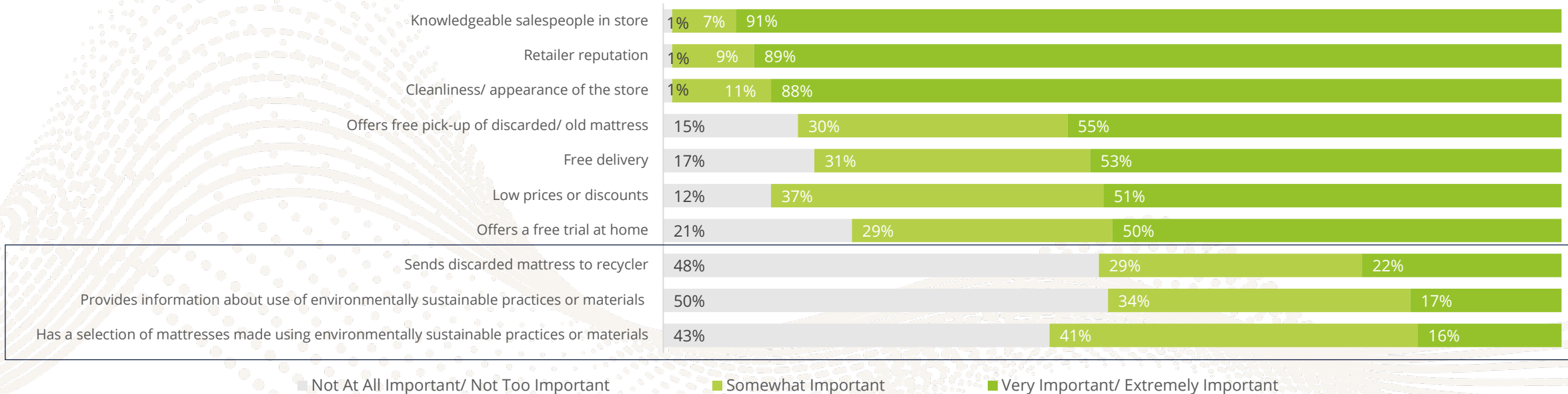


R-Q45. In your experience, how important is each of the following characteristics in influencing a consumer’s decision to purchase a particular mattress? (Base: All Qualified Respondents; N=139)

Retailers consider knowledgeable salespeople in store, retailer reputation, and store appearance to be the most influential in a consumer's decision to purchase from a particular retailer

Few retailers believe that sustainability is a highly important characteristic influencing consumers' decision to purchase from a particular retailer

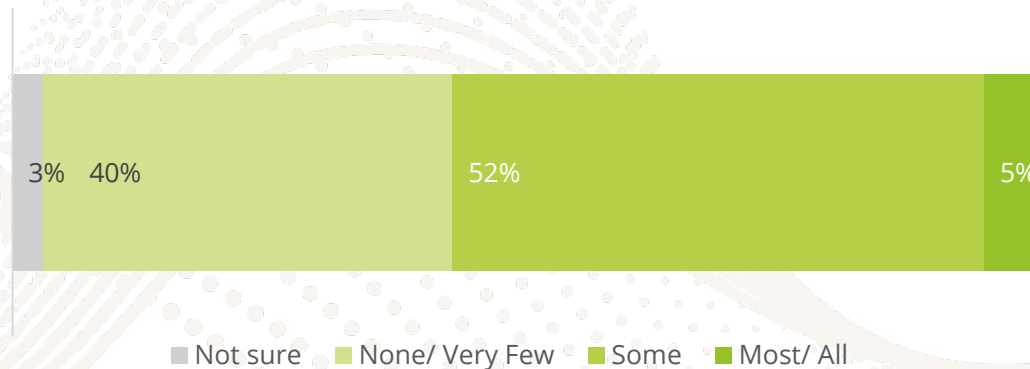
In your experience, how important is each of the following characteristics in influencing a consumer's decision to purchase a mattress from a particular retailer?



R-Q50. In your experience, how important is each of the following characteristics in influencing a consumer's decision to purchase a mattress from a particular retailer? (Base: All Qualified Respondents; N=139)

More than half of retailers surveyed say at least some of their customers are interested in purchasing sustainable mattresses, although seven in 10 say very few or none of their customers are knowledgeable about sustainability practices and materials related to mattresses

How many of your customers are interested in purchasing mattresses made using environmentally sustainable practices or materials?



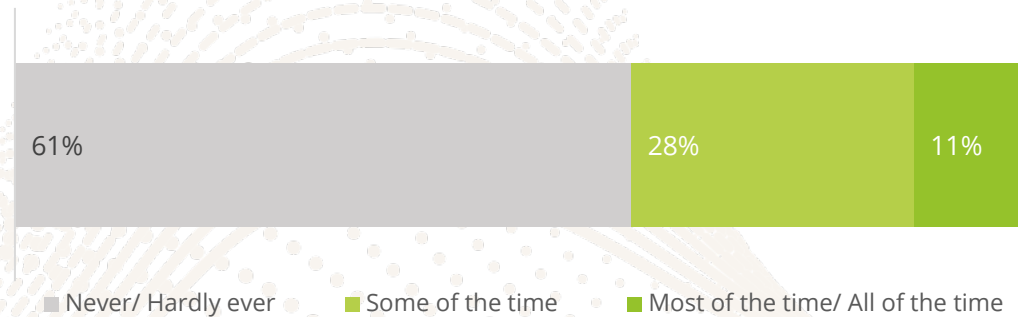
How many of your customers are knowledgeable about environmental sustainability practices and materials related to mattresses?



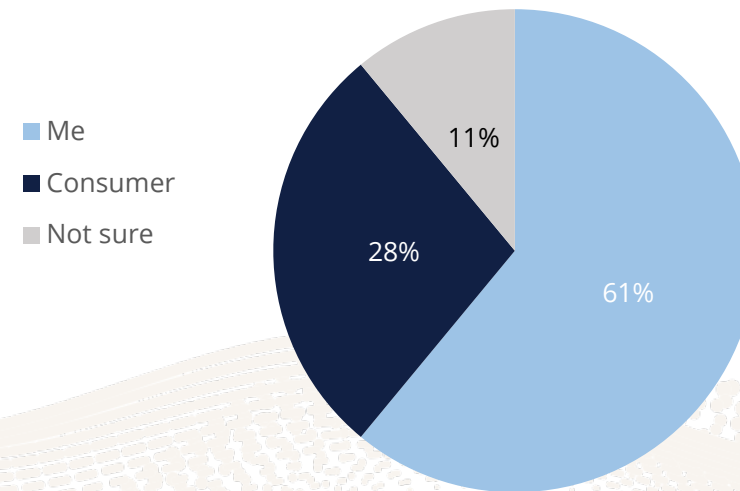
R-Q65. How many of your customers are interested in purchasing mattresses made using environmentally sustainable practices or materials? Your best estimate is fine. (Base: Have any customer interaction; N=136)
R-Q70. How many of your customers are knowledgeable about environmental sustainability practices and materials related to mattresses? (Base: Have any customer interaction; N=136)

The majority of retailers surveyed say environmental sustainability is never or hardly ever mentioned in conversations with consumers; when the topic does come up, a majority of retailers say they are the initiators of conversations about sustainability

Thinking about your interactions with consumers shopping for mattresses during the past year, how often was environmental sustainability mentioned by either you or the consumer?



When environmental sustainability was mentioned in interactions with consumers shopping for mattresses, who usually initiated this topic?

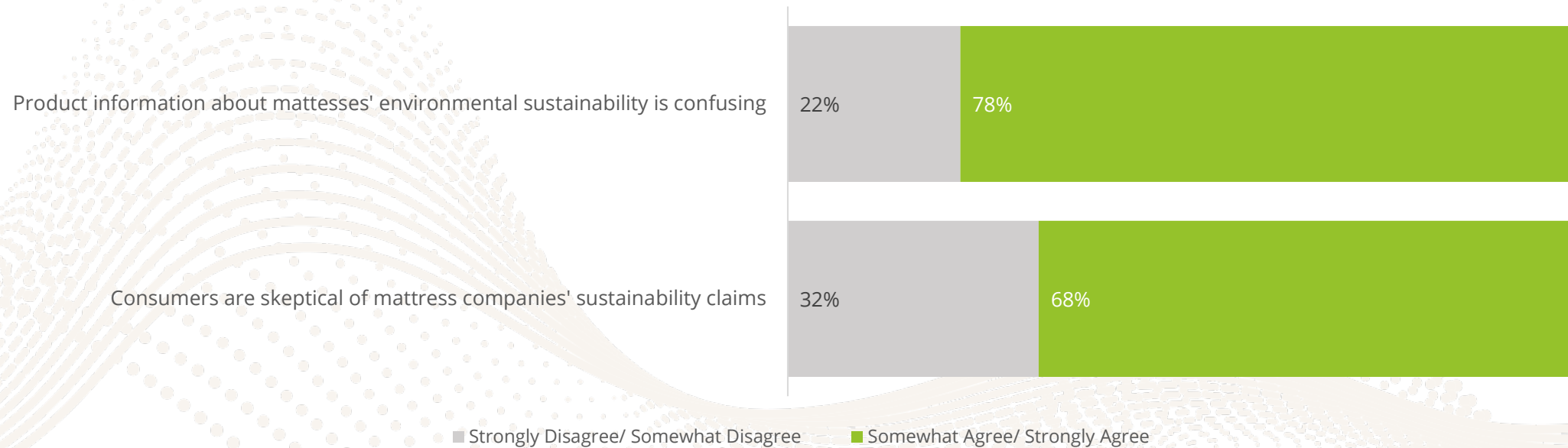


R-Q75. Thinking about your interactions with consumers shopping for mattresses during the past year, how often was environmental sustainability mentioned by either you or the consumer? Base: Have any customer interaction; N=136

R-Q80. When environmental sustainability was mentioned in interactions with consumers shopping for mattresses, who usually initiated this topic? (Base: Sustainability ever mentioned; N=123)

Nearly eight in 10 retailers surveyed find product information about mattress' environmental sustainability to be confusing, and nearly seven in 10 believe that consumers are skeptical of the sustainability claims made by mattress companies

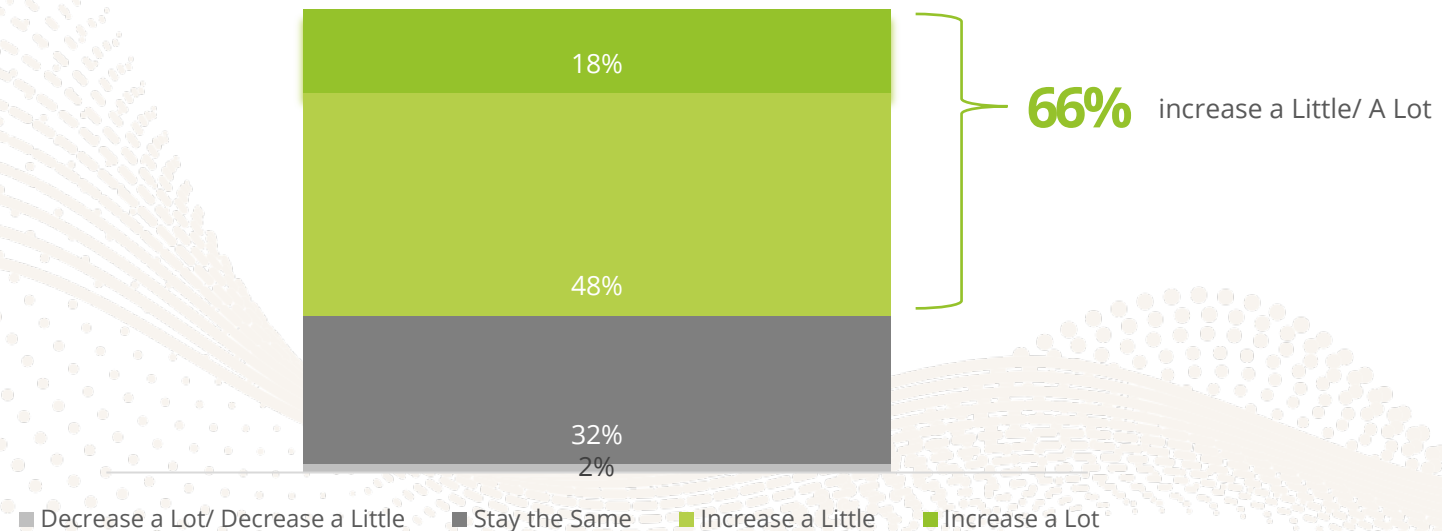
How much you agree or disagree with the following statements?



R-Q55. How much you agree or disagree with the following statements? (Base: All Qualified Respondents; N=139)

The majority of retailers surveyed believe consumer demand for mattresses made with environmentally sustainable practices and materials will increase in the next five years

During the next five years, do you think consumer demand for mattresses made with environmentally sustainable practices or materials will decrease or increase?

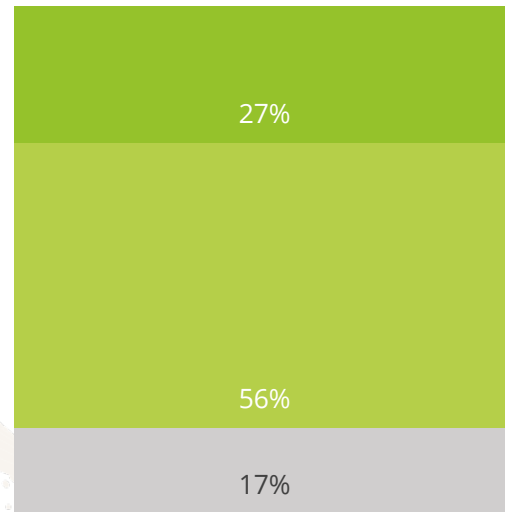


R-Q120. During the next five years, do you think consumer demand for mattresses made with environmentally sustainable practices or materials will decrease or increase? (Base: All Qualified Respondents; N=139)

One-quarter of retailers surveyed consider themselves to be extremely or very knowledgeable about environmental sustainability practices and materials related to mattresses

Overall, how knowledgeable are you about environmental sustainability practices and materials related to mattresses?

- Very knowledgeable/ Extremely knowledgeable
- Somewhat knowledgeable
- Not at all knowledgeable/ Not too knowledgeable



83% of retailers consider themselves to be at least somewhat knowledgeable

91% of retailers believe that having knowledgeable salespeople in store is extremely/very important in influencing a consumer's purchase decision

43% of consumers say sales associates who are knowledgeable about sustainability would improve the information provided about sustainability while mattress shopping

R-Q40. Overall, how knowledgeable are you about environmental sustainability practices and materials related to mattresses? (Base: All Qualified Respondents; N=139)

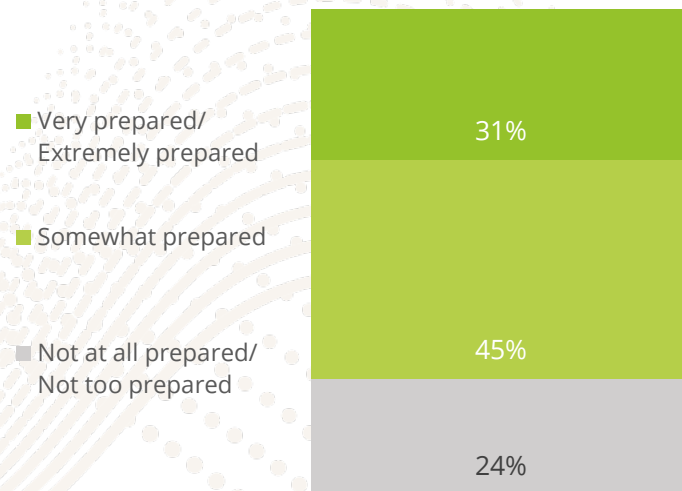
R-Q50. In your experience, how important is each of the following characteristics in influencing a consumer's decision to purchase a mattress from a particular retailer? (Base: All Qualified Respondents; N=139)

C-Q107. In your opinion, which of the following would help improve the information provided about sustainability while shopping for a mattress? (Base: Ever purchased a mattress; N=947)

The majority of retailers surveyed do not feel very or extremely prepared to talk to consumers about environmental sustainability regarding mattresses

Retailers surveyed are most likely to believe educational materials provided by the mattress manufacturer would be helpful in improving their preparedness to talk with consumers about sustainability

How prepared do you feel to talk with consumers about environmental sustainability regarding mattresses?



Which of the following would help you feel more prepared to talk with consumers about environmental sustainability?



R-Q85. How prepared do you feel to talk with consumers about environmental sustainability regarding mattresses? (Base: Have any customer interaction; N=136)

R-Q90. Which of the following would help you feel more prepared to talk with consumers about environmental sustainability? Please select all that apply. (Base: Feels somewhat/ not too/ not at all prepared; N=94)



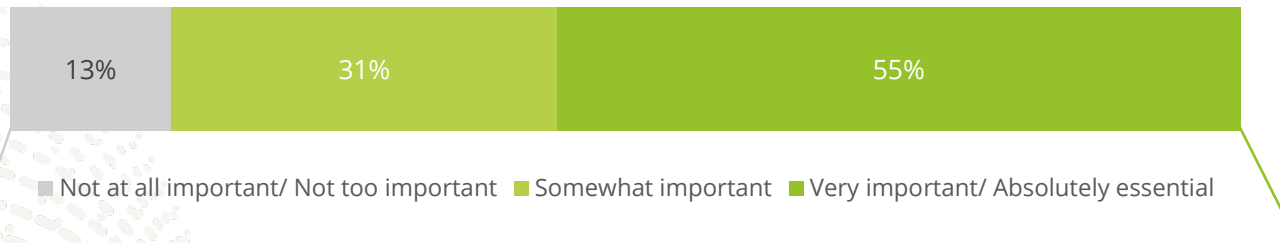
Mattress Recycling Views & Knowledge

CONSUMER PERSPECTIVES

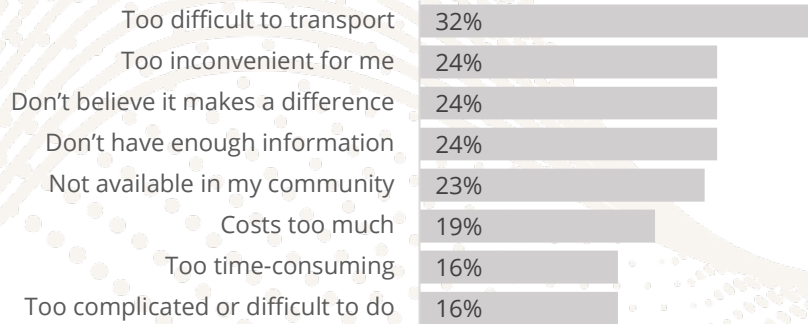
Over half of consumers believe it is very important or absolutely essential to recycle a mattress, with the top reason being to reduce landfill waste

The primary reason cited by those who do not consider it important is the difficulty of transportation

How important is recycling a mattress when it reaches the end of its useful life?



Why do you think it is not important to recycle a mattress?



Why do you think it is important to recycle a mattress?



C-Q65. How important is recycling a mattress when it reaches the end of its useful life? (Base: All Qualified Respondents; N=1006)

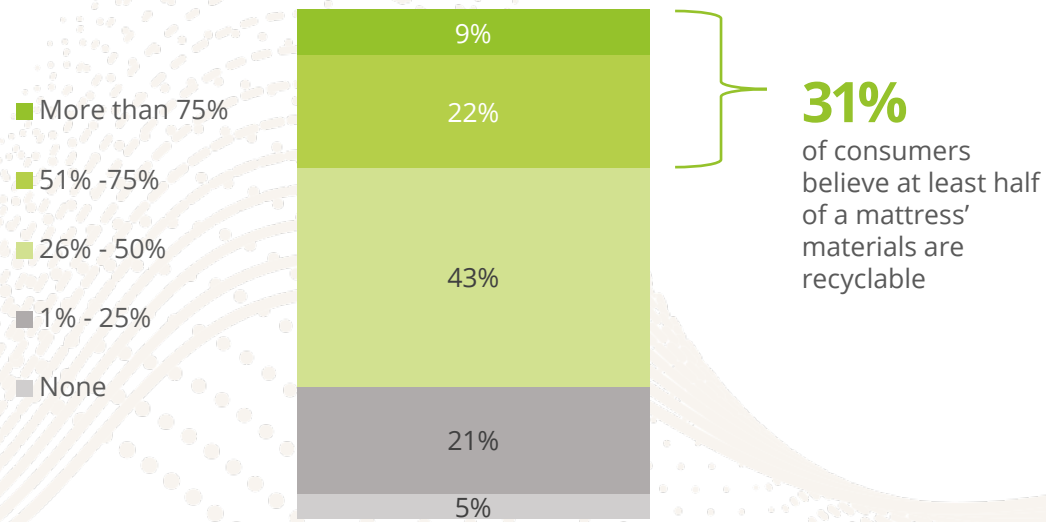
C-Q70. Why do you think it is important to recycle a mattress? Please select all that apply. (Base: Believes mattress recycling is very important/ absolutely essential; N=557)

C-Q75. Why do you think it is not important to recycle a mattress? Please select all that apply. (Base: Believes mattress recycling is not important; N=135)

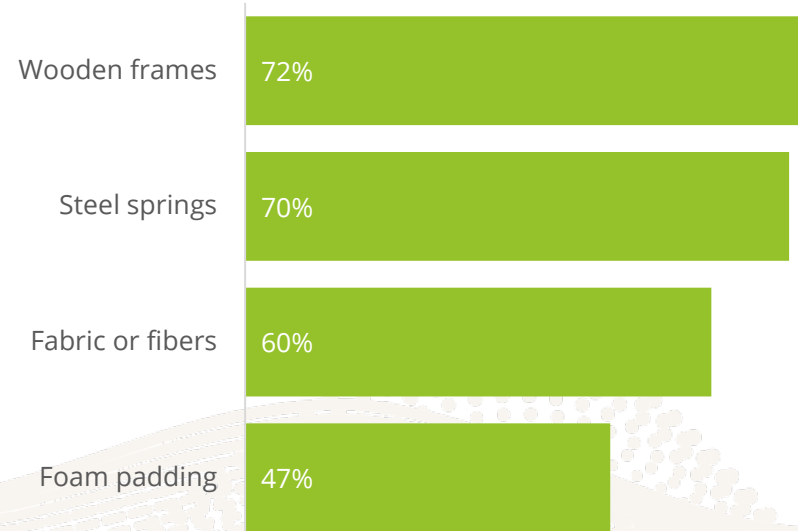
Nearly a third of consumers believe over half of a mattress' materials can be recycled, specifically wooden frames and steel springs

There is opportunity to educate and bridge the knowledge gap among consumers, as fewer than 1 in 10 know that more than 75% of a mattress' materials can be recycled.

How much of a mattress' materials do you think can be recycled to make new products?



To the best of your knowledge, which of the following components of a mattress do you think can be recycled?



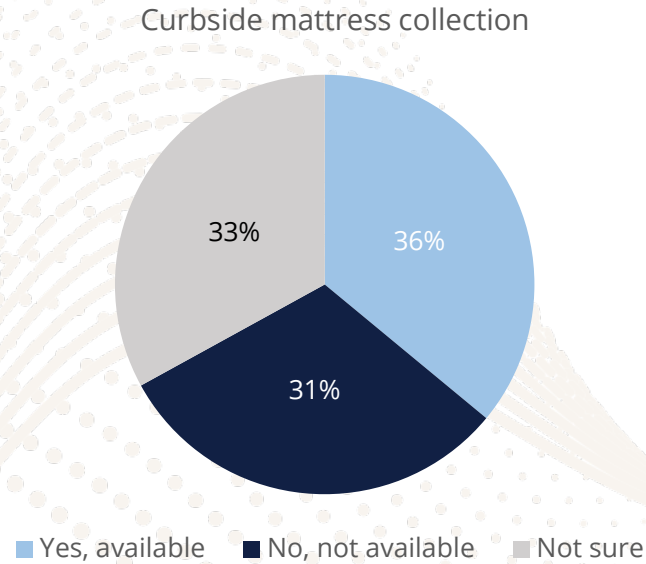
C-Q80. How much of a mattress' materials do you think can be recycled to make new products? Your best estimate is fine. (Base: All Qualified Respondents; N=1006)

C-Q85. To the best of your knowledge, which of the following components of a mattress do you think can be recycled? Select all that apply. (Base: Thinks at least some mattress materials can be recycled; N=958)

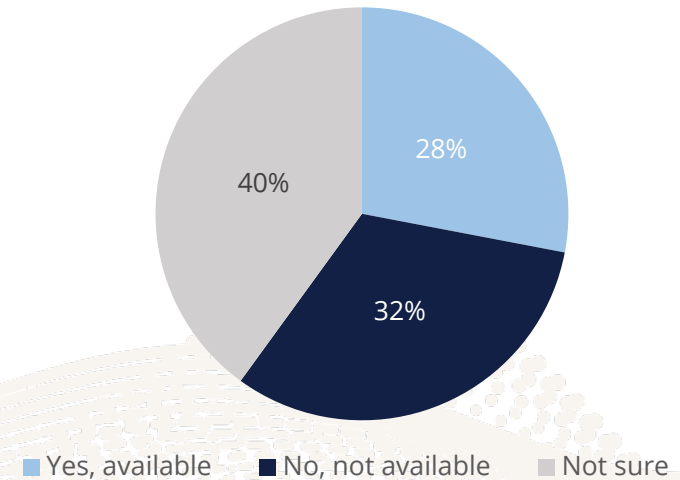
More consumers report that curbside mattress collection is available in their community (36%) than say that there are mattress collection events (28%)

However, four in 10 consumers are not sure if mattress collection events exist and one-third are uncertain if there is curbside mattress collection

Are any of the following available in your community?



Mattress collection events that you can bring a mattress to



C-Q90. Are any of the following available in your community? (Base: All Qualified Respondents; N=1006)

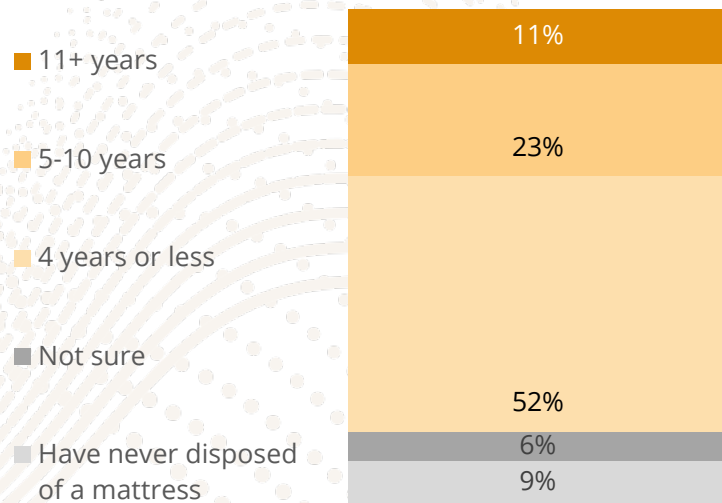


Mattress Disposal & Recycling Experience

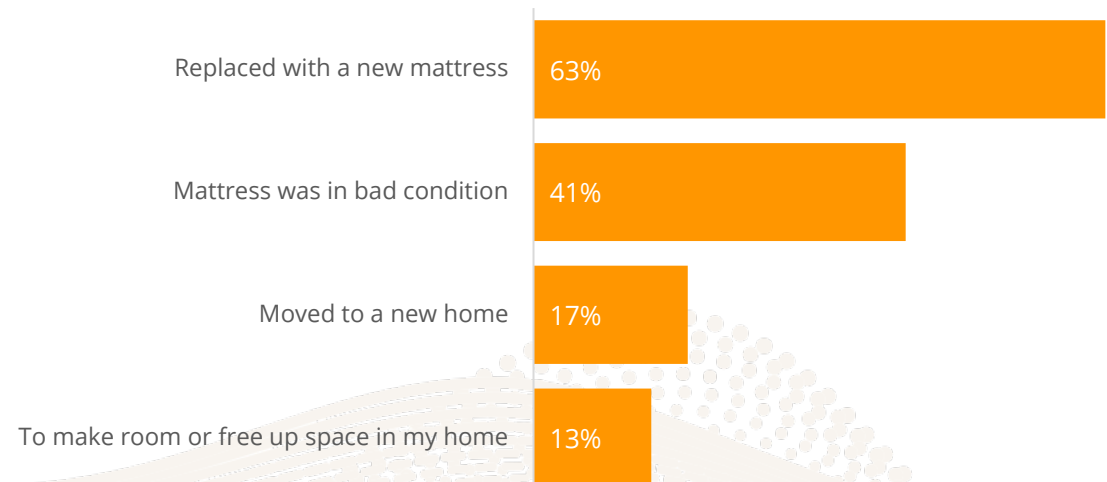
CONSUMER AND RETAILER PERSPECTIVES

Nearly half of consumers disposed of a mattress within the last four years, most frequently replacing it with a new mattress

How long ago did you last dispose of a mattress?



Thinking of the most recent time that you disposed of a mattress, why did you get rid of it?



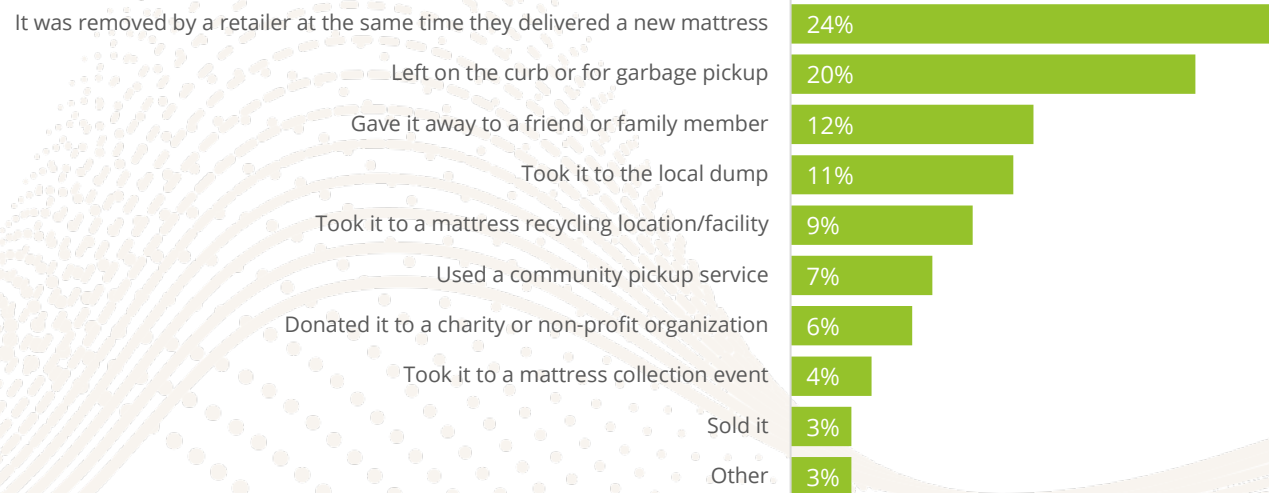
C-Q110. How long ago did you last dispose of a mattress? (Base: All Qualified Respondents; N=1006)

C-Q115. Thinking of the most recent time that you disposed of a mattress, why did you get rid of it? Please select all that apply. (Base: Have ever disposed of a mattress; N=856)

One in four consumers who have disposed of a mattress had it removed by a retailer during the delivery of a new mattress, the most common method for getting rid of it

Among these consumers, the majority (63%) were unsure if the retailer recycled their old mattress after removal

Thinking of the most recent time that you disposed of a mattress, how did you get rid of it?



25%

of consumers who did not give away, donate or sell their mattress paid an additional fee to dispose of it

32%

of consumers who had their mattress removed by a retailer report that the retailer recycled the mattress

Among consumers who took their mattress to a mattress recycling facility, local dump, or mattress collection event:

- 74% traveled 10 miles or less
 - Including 43% who traveled 5 miles or less
- 21% traveled over 10 miles

C-Q120. Thinking of the most recent time that you disposed of a mattress, how did you get rid of it? (Base: Have ever disposed of a mattress; N=856)

C-Q125. Did you pay extra or an additional fee for disposing of the mattress this way? (Base: Disposal was not through giving away, donating, or selling; N=675)

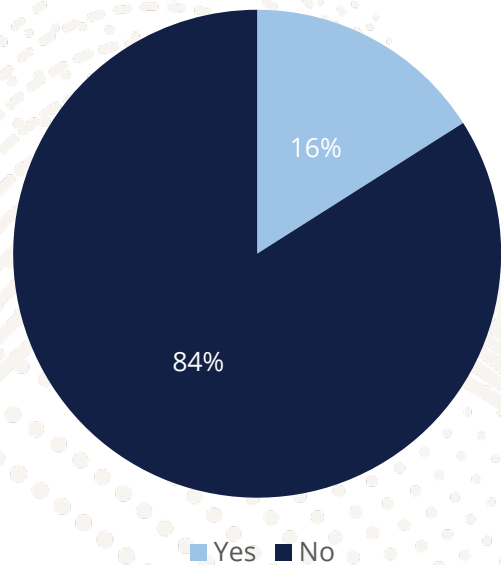
C-130. To the best of your knowledge, did the retailer who removed your old mattress recycle it? (Base: Mattress removed by retailer; N=207)

C-135. How far did you travel to take your mattress to the mattress recycling facility/ local dump/ mattress collection event? (Base: Took mattress to mattress recycling facility/ local dump/ mattress collection event; N=207)

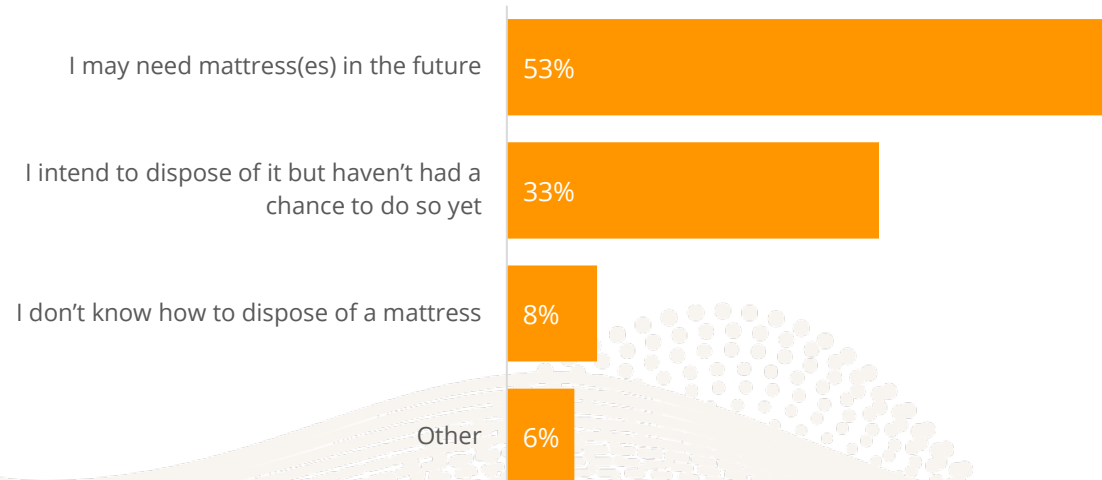
Fewer than two in 10 consumers are currently storing a mattress that is not in use

Among these consumers, more than half are doing so in anticipation of potential future use

Are you currently storing any mattresses that are not in use?



Which of the following best describes why you have decided to store the mattress(es) instead of disposing of them?

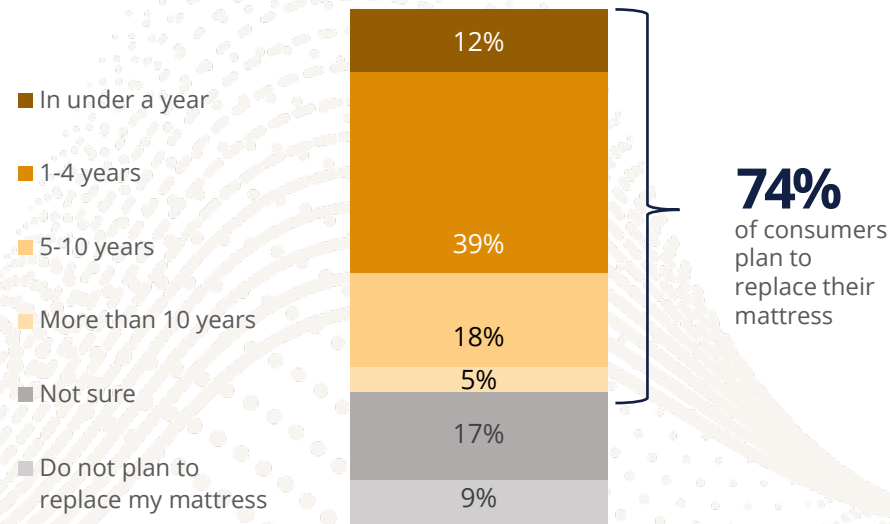


C-Q140. Are you currently storing any mattresses that are not in use? (Base: All Qualified Respondents; N=1006)

C-Q145. Which of the following best describes why you have decided to store the mattress(es) instead of disposing of them? (Base: Currently storing mattress(es) that are not in use; N=165)

Three-fourths of consumers plan to replace their mattress at some point, with most planning to utilize a retailer pick-up service to remove their current mattress when their new mattress is delivered

When do you plan to buy a new mattress or mattress set to replace the one you sleep on now?



When you buy a new mattress or mattress set, what do you think you will do with the one you sleep on now?

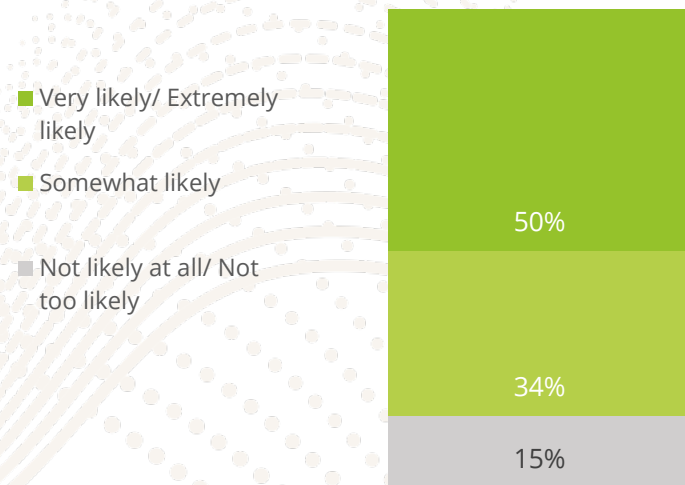


C-Q155. When do you plan to buy a new mattress or mattress set to replace the one you sleep on now? (Base: All Qualified Respondents; N=1006)
 C-Q160. When you buy a new mattress or mattress set, what do you think you will do with the one you sleep on now? (Base: Plan to replace; N=745)

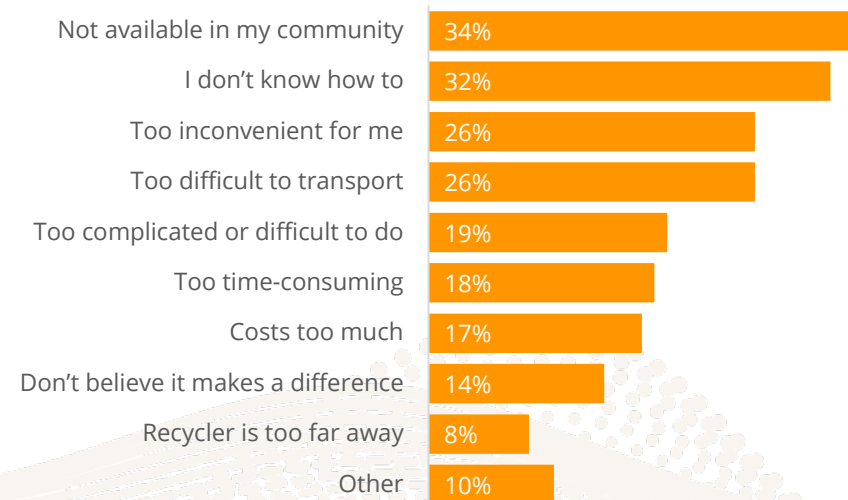
Half of consumers say they are highly likely to have their mattress recycled next time they dispose of one

Among consumers who are unlikely to recycle their mattress, top reasons include the absence of mattress recycling services in their communities and a lack of awareness about mattress recycling methods

How likely are you to have your mattress recycled the next time you dispose or get rid of a mattress?



Why are you not likely to have your mattress recycled the next time you dispose or get rid of a mattress?



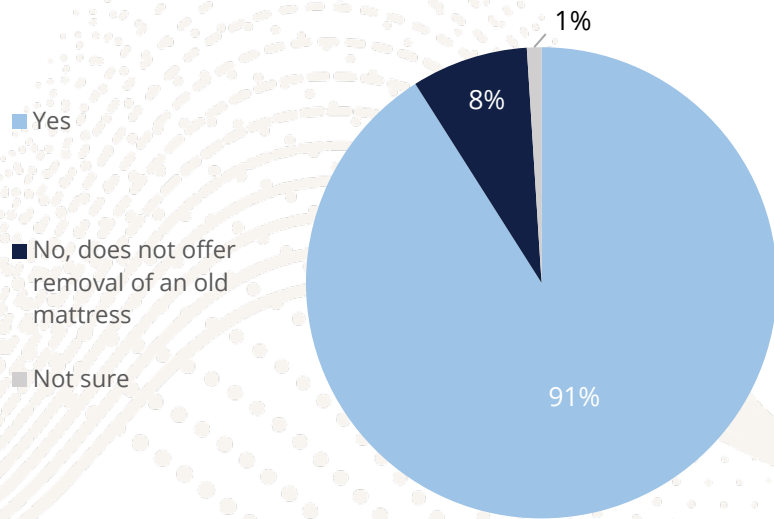
C-Q165. How likely are you to have your mattress recycled the next time you dispose or get rid of a mattress?(Base: All Qualified Respondents; N=1006)

C-Q160. Why are you not likely to have your mattress recycled the next time you dispose or get rid of a mattress? (Base: Unlikely to recycle mattress; N=155)

Nine in 10 retailers surveyed say their companies offer old mattress removal when delivering a new mattress

Among retailers whose companies offer removal of old mattresses, more than four in 10 say they take the mattress to a recycling facility and a similar number say they take it to a local dump

Does your company offer to remove an old mattress when delivering a new mattress?



How does your company dispose of the old mattresses that are removed?



R-Q110. Does your company offer to remove an old mattress when delivering a new mattress? (Base: All Qualified Respondents; N=139)

R-Q115. How does your company dispose of the old mattresses that are removed? Please select all that apply. (Base: Offers removal of old mattress; N=127)



Appendix

DEMOGRAPHIC PROFILES OF RESPONDENTS

Demographic Profile: Consumers

	Total N=1006
AGE	
18-40 years	43%
41-55 years	27%
56+ years	30%
GENDER	
Male	49%
Female	50%
REGION	
Northeast	19%
South	38%
Midwest	20%
West	23%
URBANICITY	
Urban	41%
Suburban	43%
Rural	15%

	Total N=1006
HISPANIC ETHNICITY	
Yes	20%
No	79%
RACE	
White	63%
Black or African American	20%
Asian	6%
Other	11%
MARITAL STATUS	
Married/Living together	48%
Single	37%
Divorced/Separated/Widowed	15%
CHILDREN <18 YEARS IN HOUSEHOLD	
Yes	57%
No	43%

Demographic Profile: Consumers

	Total N=1006		Total N=1006
EDUCATION		RESIDENCE TYPE	
Less than college degree	54%	Apartment	22%
College or more	46%	One family house	69%
HOUSEHOLD INCOME		Manufactured or mobile home	6%
Less than \$30,000	26%	Other	3%
\$30,000 - \$49,999	30%		
\$50,000 - \$99,999	18%		
\$100,000 or more	25%		
MATTRESS RESEARCH/PURCHASE DECISION-MAKING RESPONSIBILITIES			
I am solely responsible	62%		
I am primarily responsible	16%		
I participate in decision-making	22%		
EMPLOYMENT STATUS			
Employed	59%		
Not employed	41%		

Demographic Profile: Retailers

	Total N=139		Total N=139
AGE		EDUCATION	
18-40 years	14%	Less than college degree	42%
41-55 years	35%	College or more	58%
56+ years	51%	HOUSEHOLD INCOME	
GENDER		Less than \$30,000	0%
Male	74%	\$30,000 - \$49,999	4%
Female	23%	\$50,000 - \$99,999	33%
REGION		\$100,000 or more	53%
Northeast	17%	RACE	
South	35%	White	85%
Midwest	27%	Black or African American	2%
West	22%	Asian	3%
EMPLOYMENT STATUS		Other	10%
Employed full-time	86%	CUSTOMER INTERACTION	
Employed part-time	2%	Not at all/ Very little	7%
Self-employed	12%	Some	15%
		A lot/ A great deal	78%

Demographic Profile: Retailers

	Total N=139		Total N=139
PLACE OF EMPLOYMENT		MATTRESS SALES DONE ONLINE	
Independent mattress retailer	35%	None	27%
Independent furniture retailer	26%	A few	37%
Regional furniture retailer	9%	Some	27%
Regional mattress retailer	8%	Most/ All	9%
National mattress retailer	6%	BRICK-AND-MORTAR RETAIL LOCATIONS	
National furniture retailer	5%	1-5 stores	53%
Online-only retailer	4%	6-20 stores	19%
Department store	4%	21-50 stores	8%
Other	3%	Over 50 stores	20%
JOB RESPONSIBILITIES		PRODUCTS SOLD	
Sales/store manager or assistant manager	43%	Mattresses	100%
Sales associate	36%	Pillows (non-decorative)	93%
Owner	31%	Mattress toppers	48%
Marketing	26%	Mattress pads or mattress protectors	91%
Purchasing	24%	Bed Sheets	79%
Customer Service	24%	Adjustable mattress bases	99%
Advertising	19%	Other bed accessories	55%
Fulfillment or delivery	13%		
Other	9%		