

THE Better Sleep COUNCIL

Consumer Research

PREPARED FOR THE BETTER SLEEP COUNCIL JANUARY 2024

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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 the following topics:
  - Mattress replacement cycle and pricing
  - Shopping journey, including the role of brand



Prior Waves in Research Series

Methodology

- Survey conducted online in November 2023
- National sample
- 1,039 respondents
- Participants met the following qualifications:
  - US adults, 18+ years of age
  - Participate in the research, selection, and mattress purchase, with sole or shared involvement and responsibility
  - Not employed by a furniture, mattress, or bedding accessory manufacturer or major retailer, or in advertising, PR or market research

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

- Gen Z: 18-24 years old
- Millennials: 25-40 years old
- Gen X: 41-55 years old
- Boomers+: 56+ years old

Key Findings

Several trends have emerged since 2020.

- **More consumers** report recently (past two years) purchasing a mattress.
- **More consumers** say they sleep on a spring or hybrid mattress.
- Willingness to purchase a mattress online has **increased**, although more consumers still would purchase at a brick-and-mortar location.
- The perceived price of a quality mattress has **decreased**.
- Satisfaction with current mattress has **increased**.

- **The shopping journey typically is triggered by an uncomfortable or deteriorated mattress. Consumers still value feeling and trying a mattress before purchase, while fulfillment services continue to be the most common factor in purchasing from a particular retailer.**
  - Mattress deterioration, and health and comfort are the most common triggers for mattress replacement.
  - One-third of consumers who have purchased a mattress say that an advertisement was a reason they began shopping – typically a sale or special offer.
  - The majority of consumers still consider it very important to feel and try a mattress before buying it.
  - Consumers' top information sources are in-store visits and search engines.
  - Fulfillment services (e.g., free delivery, free pick-up of old mattress, easy returns, etc.) is the most common purchase driver for a particular retailer.

Key Findings

- **Most consumers are not brand-loyal when it comes to mattresses and do not consider themselves very knowledgeable about mattress brands.**
  - Two-thirds of consumers say their current mattress is a different brand than their previous mattress. The top drivers for switching brands are low price and better brand reputation. Brand reputation was also a top driver for keeping the same mattress.
  - Only one-quarter say they are highly knowledgeable about mattress brands.
  - Most consumers do research before purchasing a mattress – typically about pricing and customer reviews. Nearly four in 10 consumers who do research before purchasing a mattress seek out information on mattress brands.
  - Four in 10 consumers say that having a wide selection of mattress brands influences their decision to purchase from a particular retailer.

Key Tracking Indicators

Comparison of 2023, 2022, 2020 and 2016 findings



Moving the Needle

Consumers expectations for the mattress replacement cycle is similar to previous years. The perceived price of a quality mattress declined since 2016 (when values adjusted for inflation).

Perceived Price of Quality, Queen-size Mattress
(Adjusted for Inflation)

- 2023 Mean = $1192
- 2022 Mean = $1203*
- 2020 Mean = $1253*
- 2016 Mean = $1415*

Kept their Last Mattress

- 2023 Mean = 8.8 years
- 2022 Mean = 8.3 years
- 2020 Mean = 9.0 years
- 2016 Mean = 8.9 years

Expect to Keep a New Mattress

- 2023 Expected Mean = 9.6 years
- 2022 Expected Mean = 9.4 years
- 2020 Expected Mean = 9.5 years
- 2016 Expected Mean = 9.4 years

*Values presented in 2023 US dollars



Detailed Findings



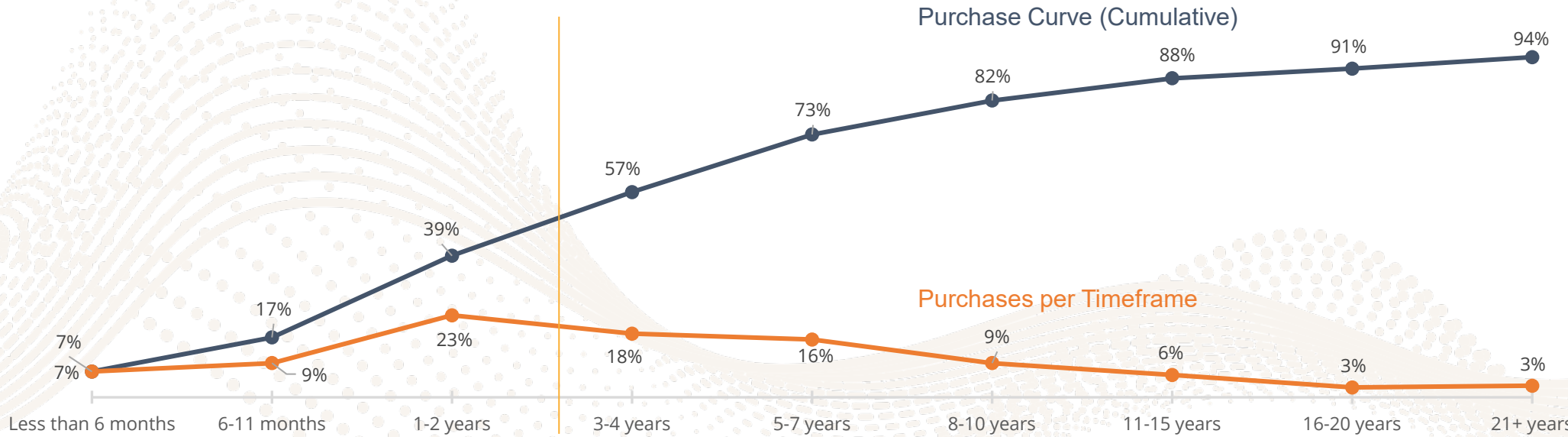
DETAILED FINDINGS

Current Experience with Mattress: mattress purchasing history and current mattress type

Mattress Purchasing History

Nearly six in 10 consumers last purchased a mattress within the past four years.
For most consumers (80%), the mattress they most recently purchased is the one they currently sleep on.

The number of consumers who purchased a mattress within the past two years has increased since 2020 (31% in 2020 vs. 39% in 2023).

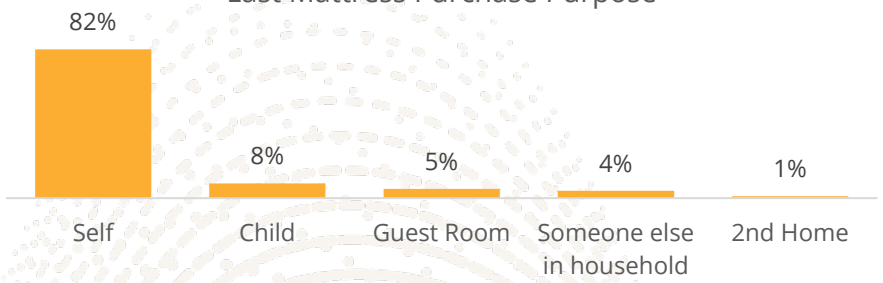


D1. How long ago did you last purchase a mattress either for yourself or for somebody else in your household? (N=1039, 6% not sure/have never purchased a mattress)

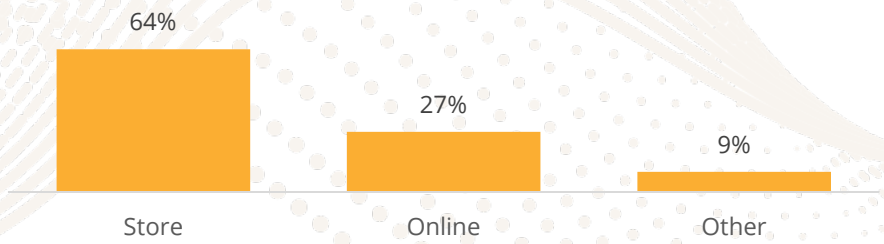
Mattress Purchasing History

More than eight in 10 consumers have purchased at least one mattress in the past 10 years. Most say their last mattress purchase was for themselves and two-thirds purchased their mattress at a store.

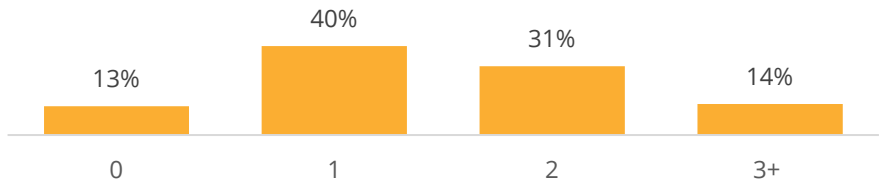
Last Mattress Purchase Purpose



Current Mattress Purchase Location



No. of Mattresses Purchased in Past 10 years



43% of consumers sleep on a mattress that had a warranty at the time of purchase.

Foundation Purchases When Current Mattress was Purchased:

- **40%** of consumers purchased a new boxspring/ foundation at the same time the mattress they currently sleep on was purchased
- **11%** purchased a new adjustable foundation
- **19%** put the mattress on top of an existing boxspring/ foundation/ base

D2. And was the mattress you last bought …? (N=1039)
D8a. From which of the following did you (or someone else) purchase your mattress, either by visiting their brick-and-mortar location, online or through other means (like mail order, catalog, phone? (N=1039)
F12. How many mattresses have you purchased in the past 10 years? (N=1039)

The Mattress Consumers Currently Sleep On

Size



California King: 6%

King: 23%

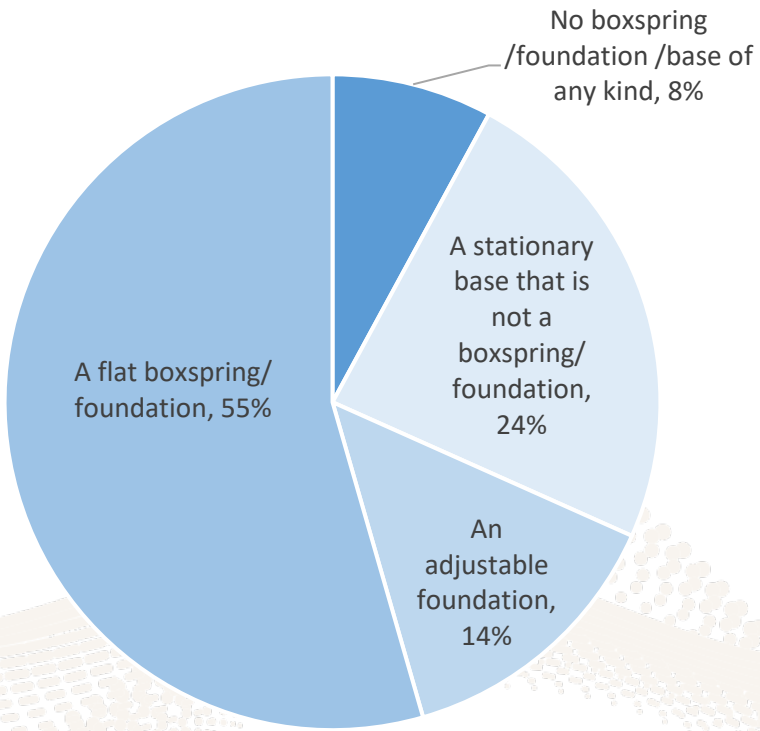
Queen: 50%

Full/Double: 14%

Twin: 7%

D6. What size is the mattress you sleep on? Is it…(N=1039)

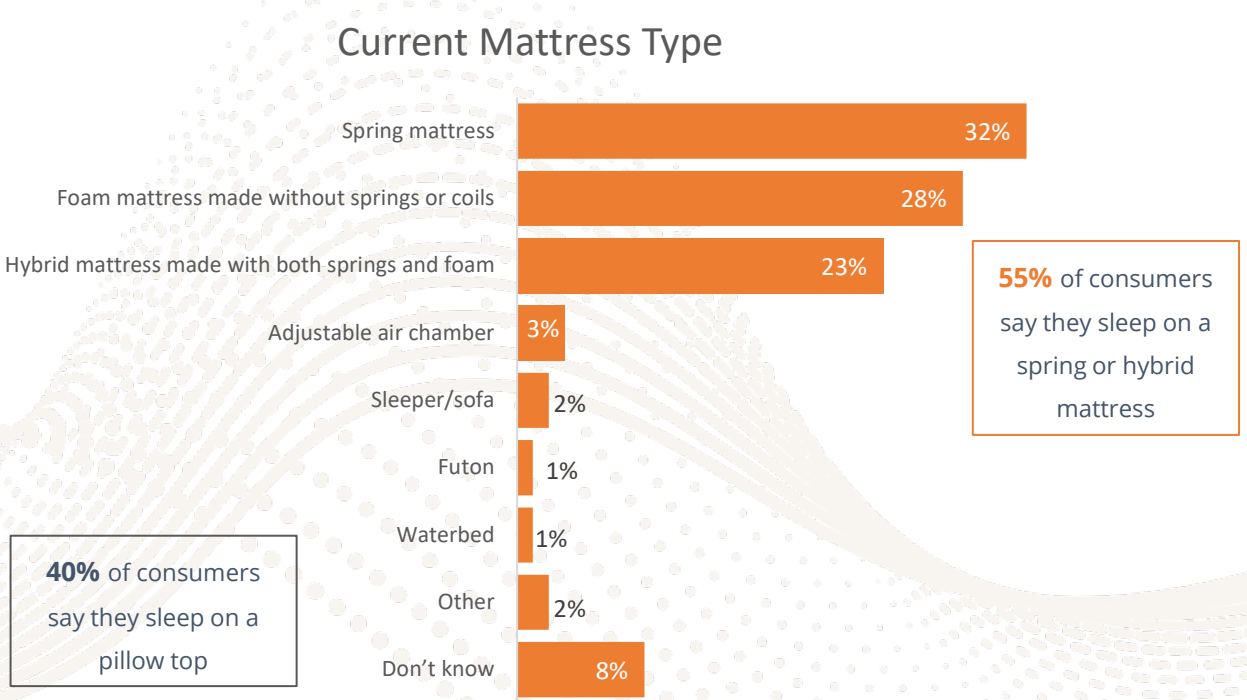
Foundation

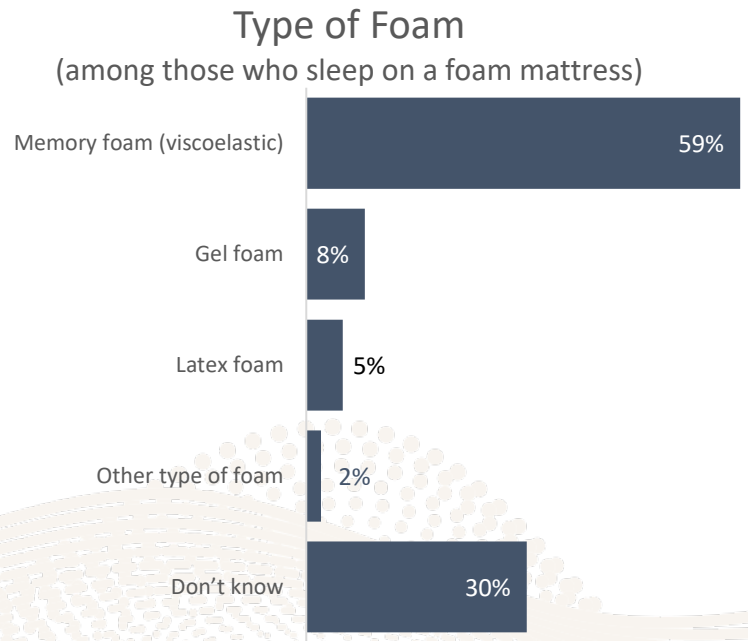


D5. Do you use your current mattress on top of…? (N=1039)

Current Mattress Type

More than half of consumers say they sleep on a spring or hybrid mattress. This level has increased since 2020 (42% in 2020 vs 55% in 2023).





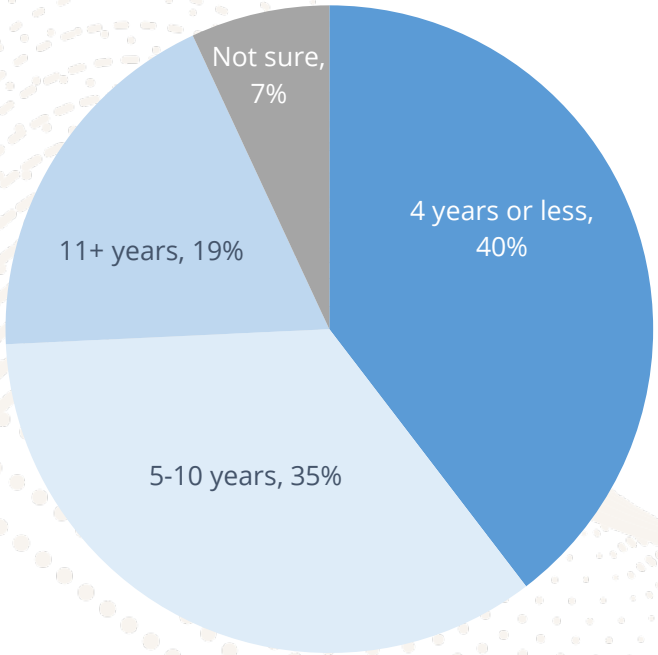
D4. What type of mattress do you sleep on? (Base: All qualified respondents; N=1039)
D4a. Is the mattress you sleep on a pillow top? (Base: All qualified respondents; N=1039)

D4b. Do you know which of the following types of foam your mattress is made from? Please select all that apply. (Base: Respondents that sleep on a foam mattress; N= 296)

The Mattress Consumers Currently Sleep On

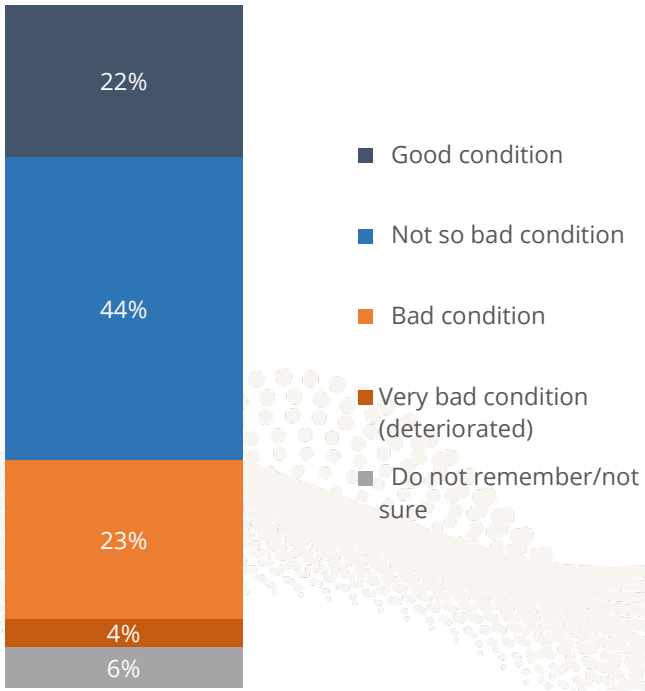
Four in 10 consumers report that the mattress they currently sleep on is less than five years old.
Consumers typically replaced their mattress when their previous mattress was in “not so bad” condition.

Age of Mattress



D1/D3 How long ago did you last purchase a mattress for yourself/How long ago did you (or someone else) purchase the mattress you currently sleep on? (N=1039)

Condition of Previous Mattress

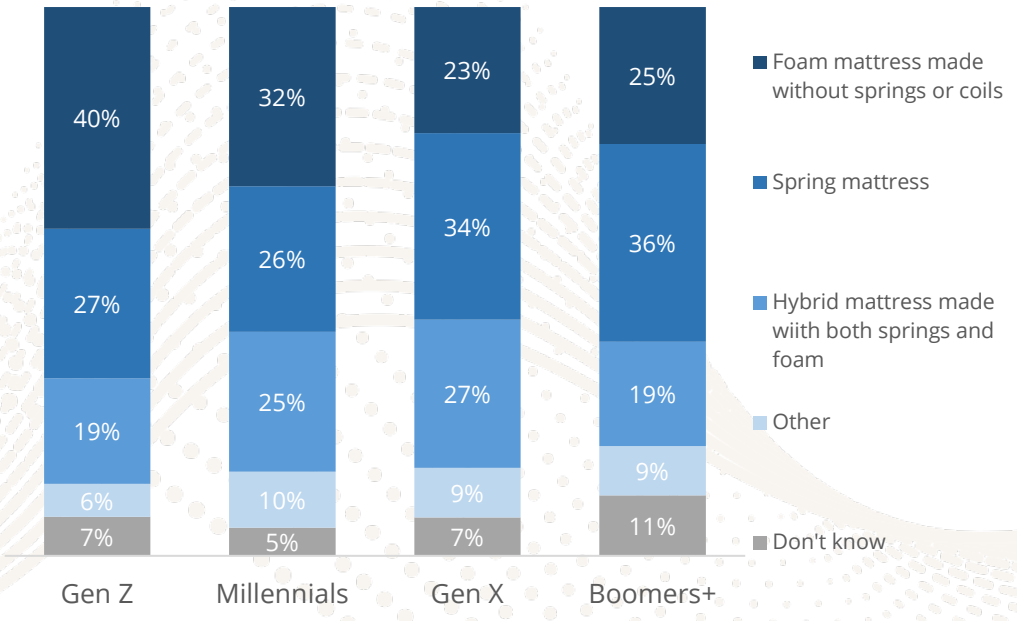


D17. In what condition was your previous mattress before you replaced it with the one you currently sleep on? (N=1039)

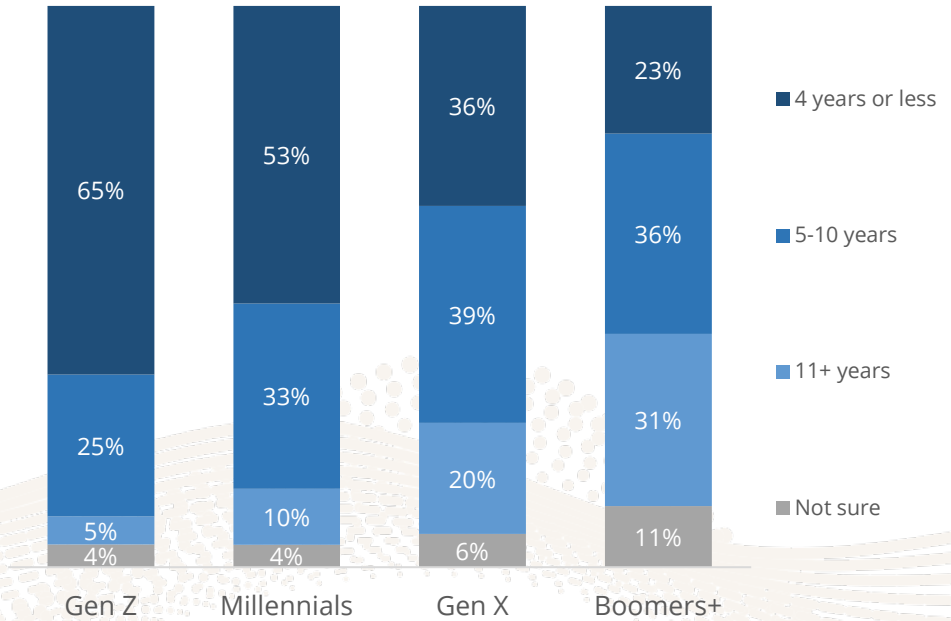
Generational Differences in Mattress Type and Age

Gen Z and Millennials are more likely than older generations to sleep on a foam mattress. The majority of Gen Z and Millennials sleep on a mattress that is less than 5 years old. There are no generational differences in the condition of the mattress before replacement.

Current Mattress Type



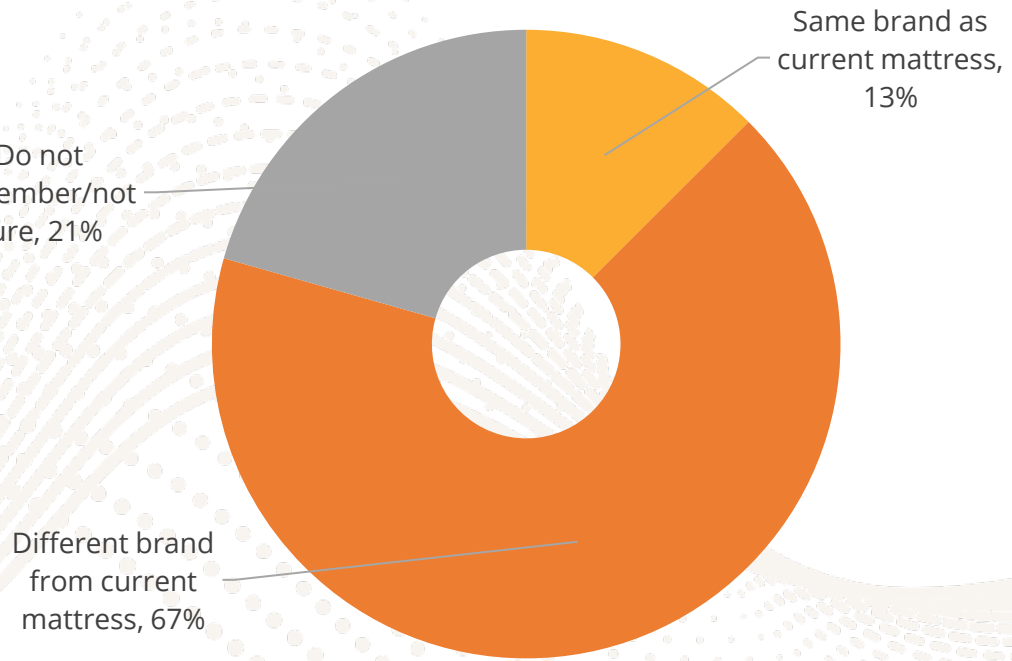
Current Mattress Age

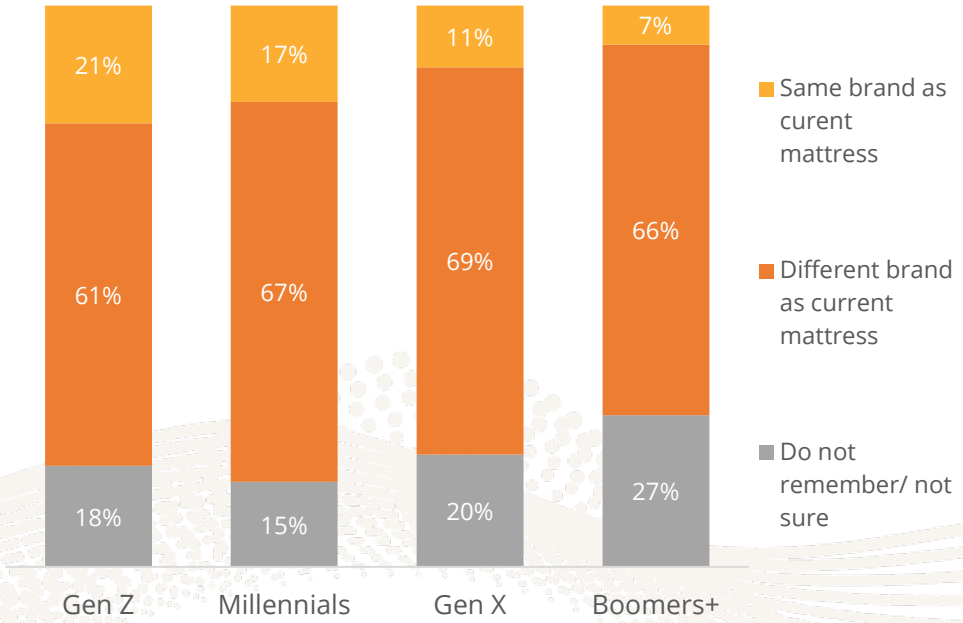


Two-thirds of consumers say their current mattress is a different brand than their previous mattress

Gen Z and Millennials are more likely than older generations to say their current mattress is the same brand as their previous mattress.

Brand of Previous Mattress vs. Current Mattress





D17a. Was your previous mattress or mattress set the same brand or a different brand from your current mattress? (N=1039)

Low price and better brand reputation are the top reason for purchasing a different brand

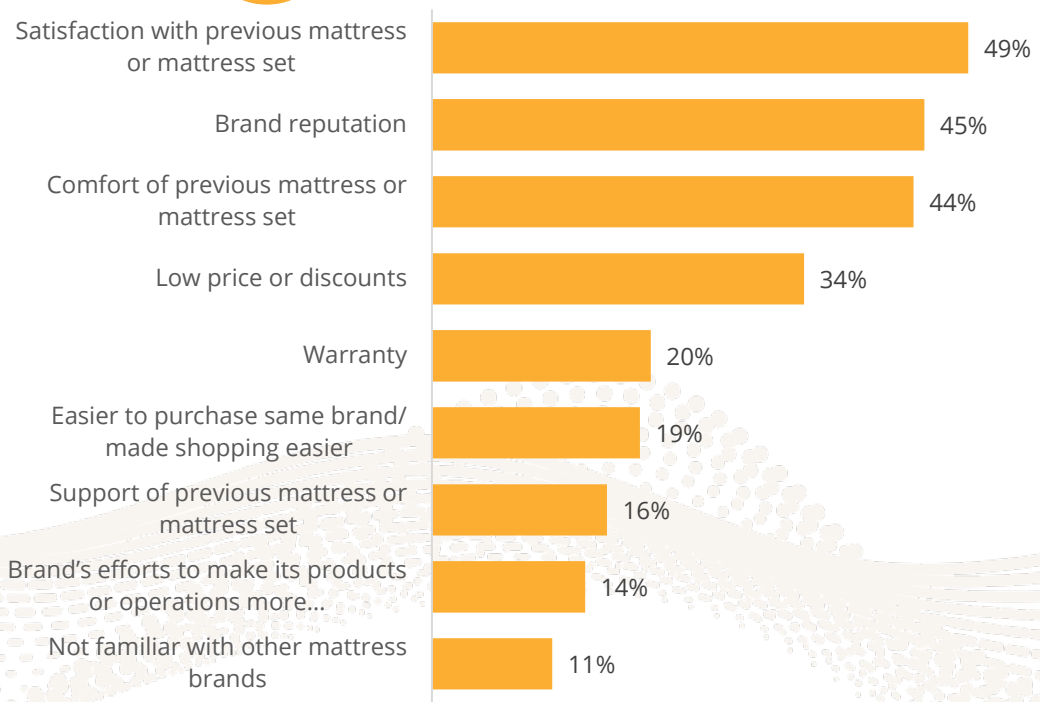
Reasons for purchasing the same brand are satisfaction with and comfort of previous mattress, as well as brand reputation

67% Reason for Purchasing Different Brand



D17c. Why did you get a different mattress brand? (N=655)

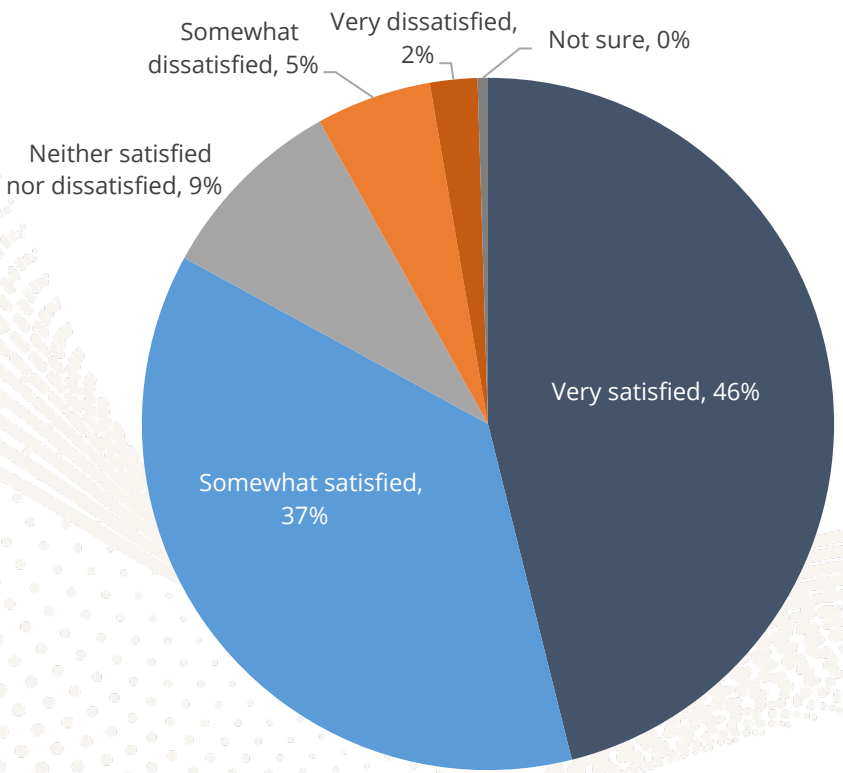
13% Reason for Purchasing Same Brand



D17b. Why did you get the same mattress brand? (N=130)

Satisfaction with Mattress

Eight in 10 consumers are satisfied with their current mattress. Mattress satisfaction has increased since 2020 (83% in 2023 vs. 76% in 2020).



D11. How satisfied today are you with your current mattress? (N=1039)

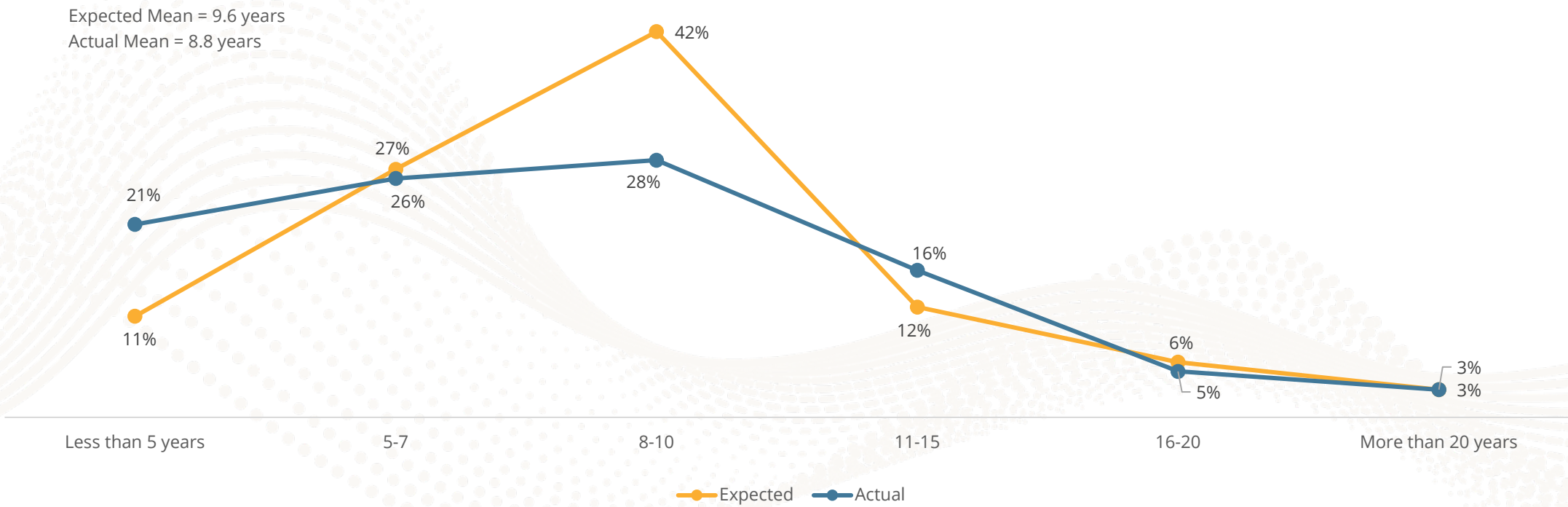


DETAILED FINDINGS

Mattress Replacement Cycle: expected and actual frequency of mattress replacement

Mattress Replacement Cycle

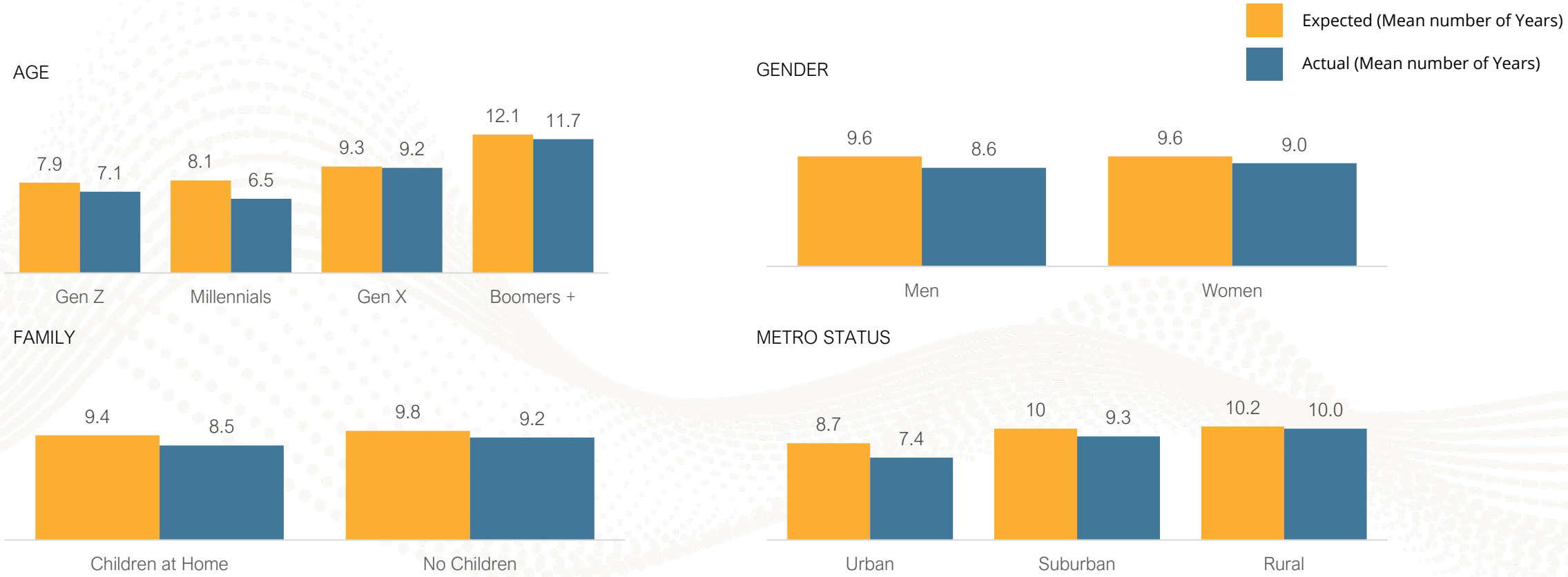
Consumers predominantly expect a mattress to last 8-10 years, yet nearly half report that they replaced their mattress within seven years.



Expected: C7. How many years would you expect to keep a new quality mattress? (N=1039, 13% not sure)
Actual: D16. How many years did you have your previous mattress before you replaced it with the one you currently sleep on? (N=1039, 29% not sure)

Replacement Cycle: Demographics

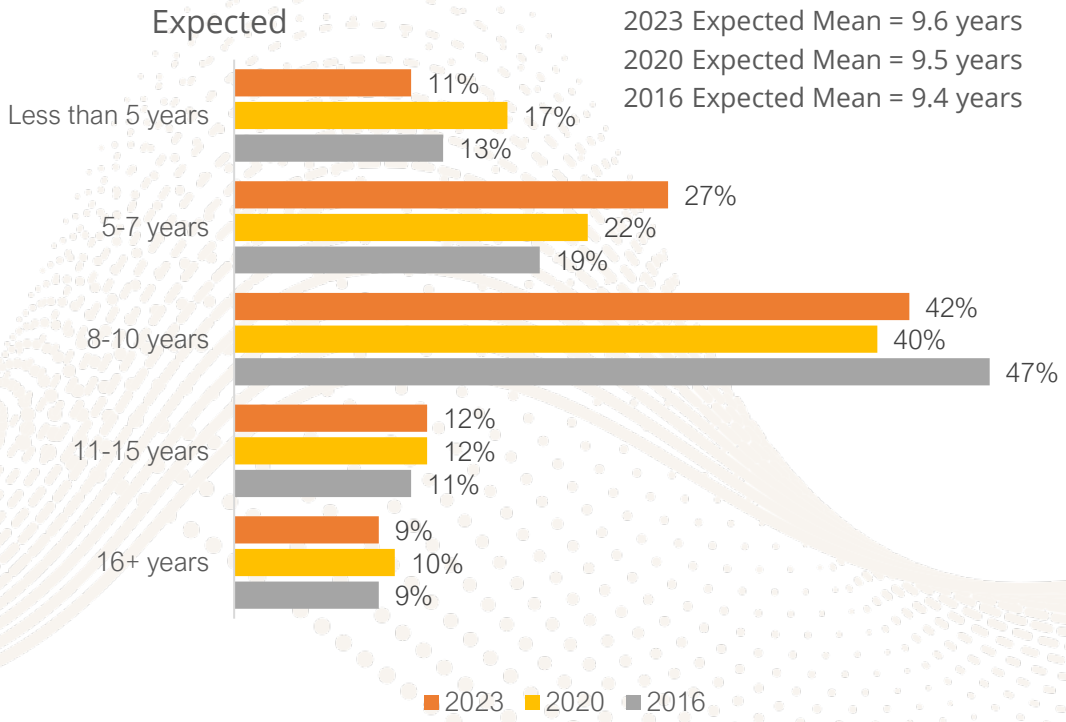
Expected and actual replacement cycles differs based on age and metro status

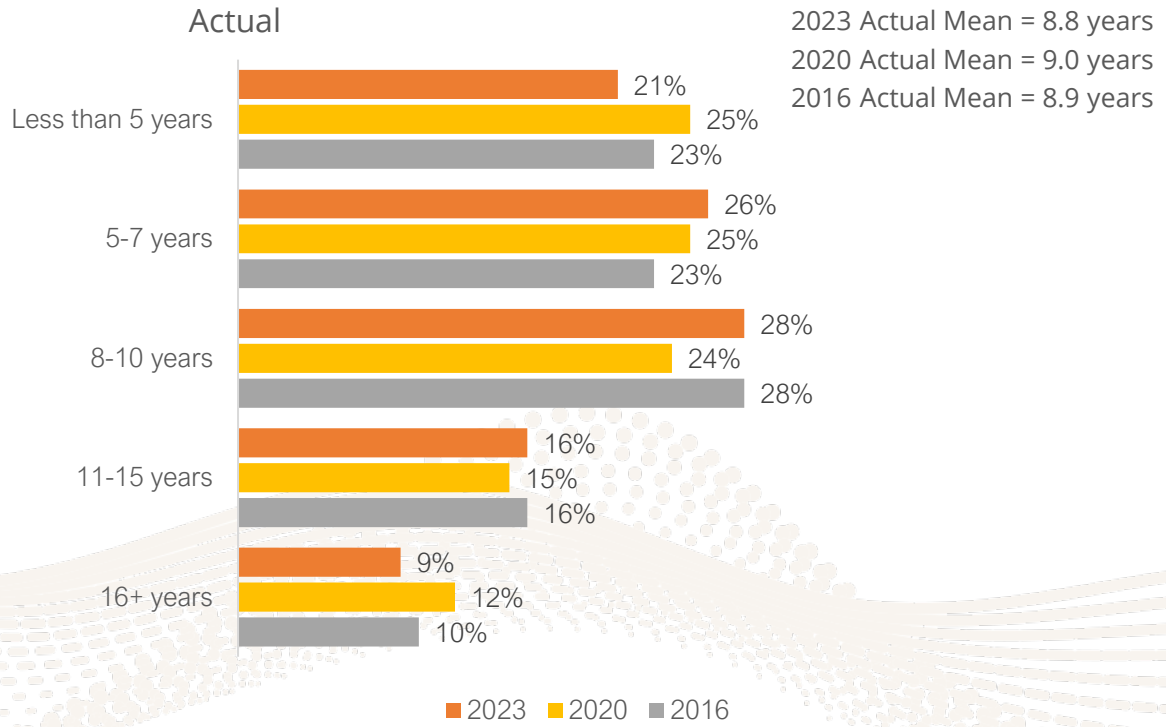


Expected: C7. How many years would you expect to keep a new quality mattress? (N=1039, 13% not sure)
Actual: D16. How many years did you have your previous mattress before you replaced it with the one you currently sleep on? (N=1039, 29% not sure)

Replacement Cycle: comparisons with 2020 & 2016

On average, expected and actual replacement cycles in 2023 are similar to those in 2020 and 2016. Since 2016, more consumers expect to keep their mattress less than 8 years (38% in 2023 vs. 32% in 2016).

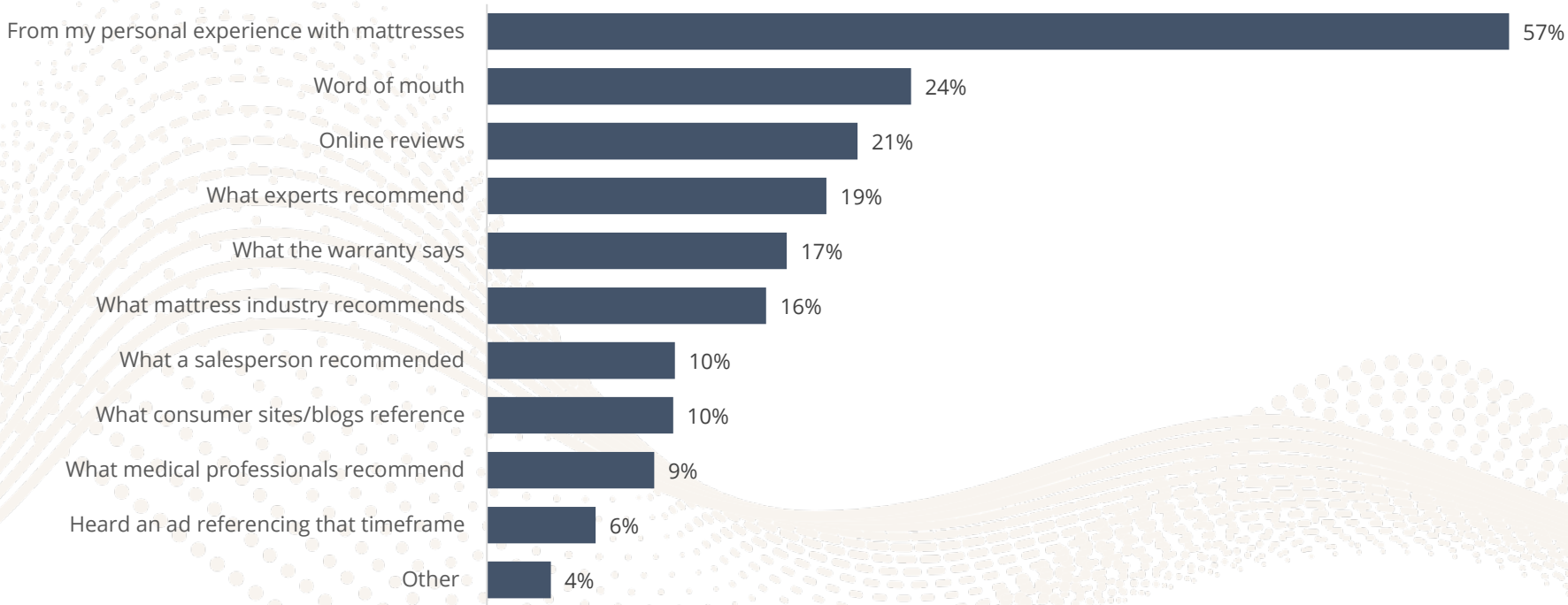




Expected: C7. How many years would you expect to keep a new quality mattress? (N=1039, 13% not sure)
Actual: D16. How many years did you have your previous mattress before you replaced it with the one you currently sleep on? (N=1039, 29% not sure)

Sources of Information for Replacement Frequency

Consumers are most likely to rely on their own experiences rather than outside sources for guidance on how frequently to replace a mattress.



C8. How did you form your opinion about how frequently a mattress should be replaced? (N=1039)

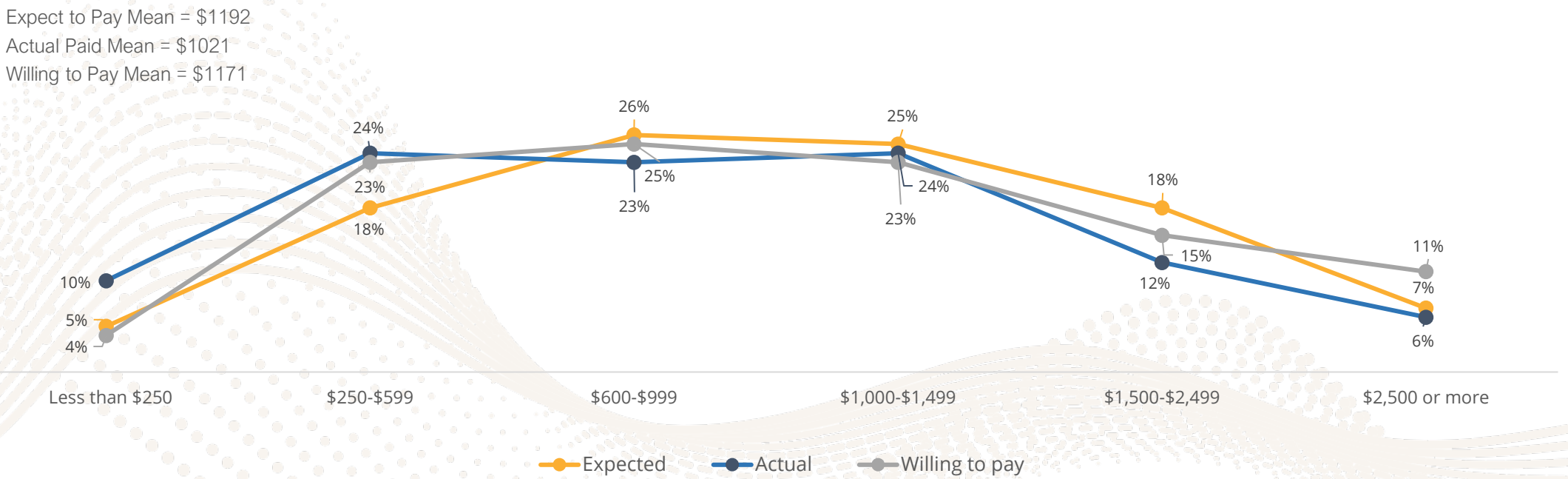


DETAILED FINDINGS

Mattress Pricing: expected pricing and actual spending

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

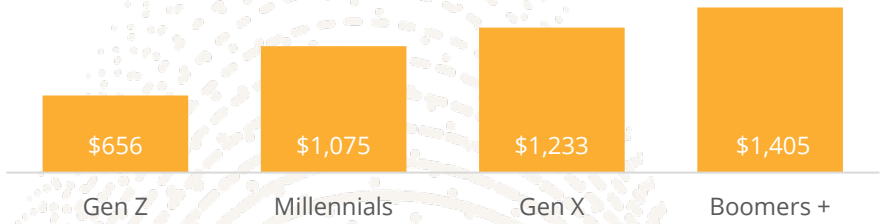


Expected: C9. In your opinion, how much does a new quality queen-size mattress or mattress set cost? (maximum value, N=1039)
Actual: D7. How much did your current mattress cost? (among consumers who sleep on a queen-size mattress, maximum value, N=523)
Willing to pay: D14a. If you were shopping for a 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 or set, N=386)

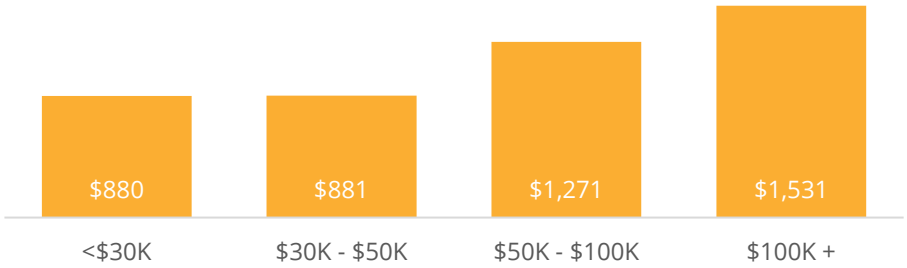
Average Price Willing to Pay: Demographics

The price consumers are willing to pay for a queen-size mattress set differs based on age, education level, income and metro status

AGE



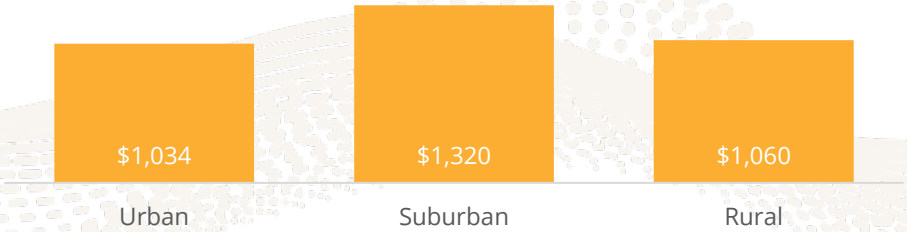
INCOME



EDUCATION



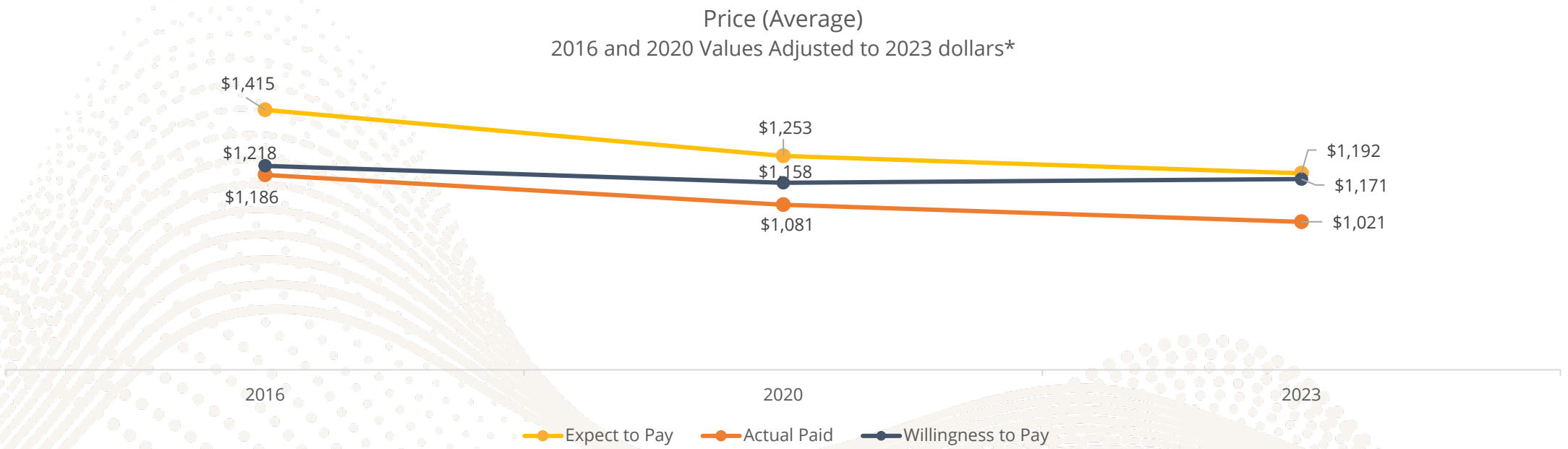
METRO STATUS



Willing to pay: D14a. 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=386)

Expectations and Actual Spending: Comparisons to 2016 and 2020 (Adjusted for Inflation)

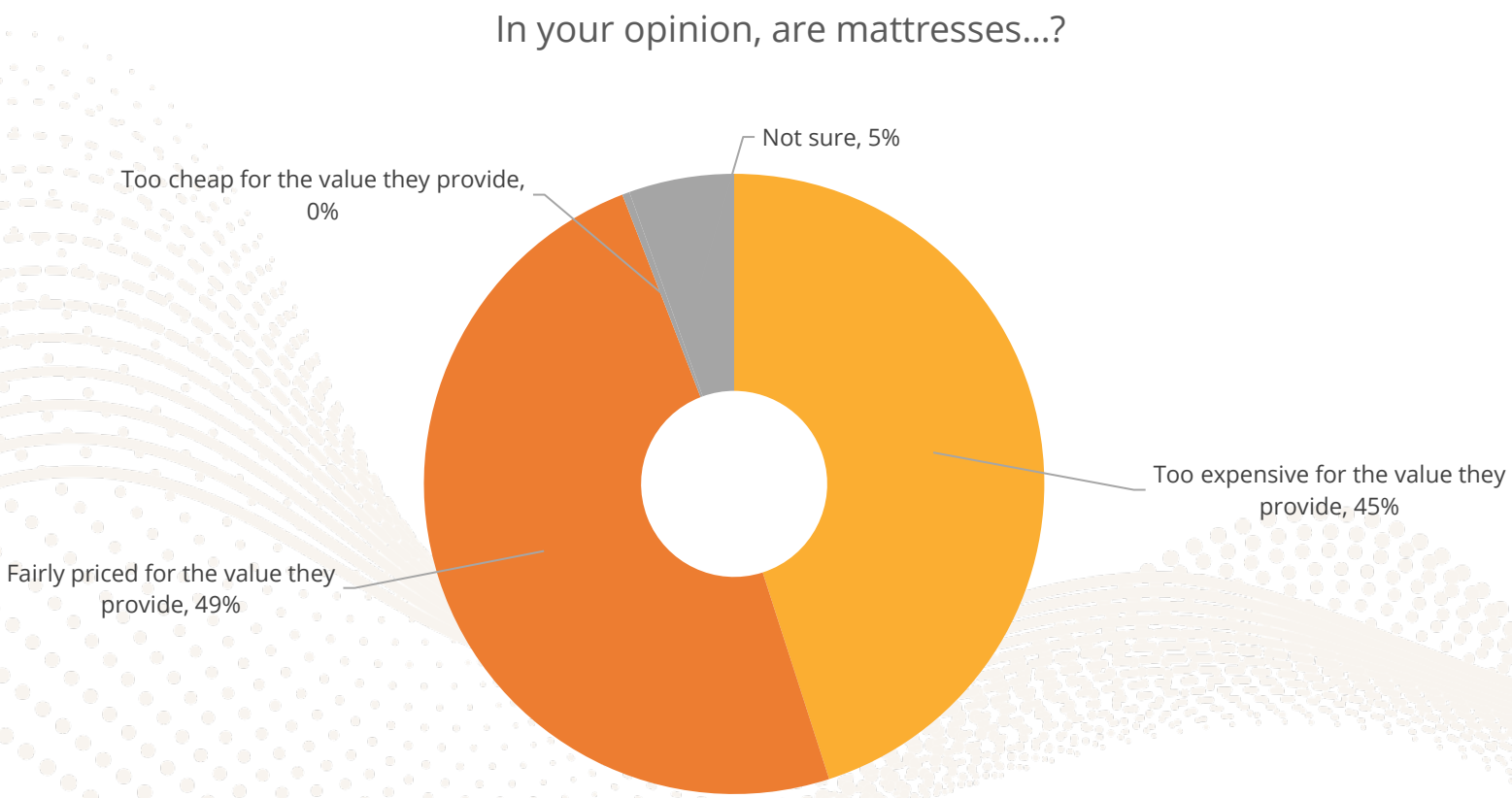
When dollar values are adjusted for inflation, price expected to pay, willingness to pay and actual spend have declined since 2016.



*Source: Bureau of Labor Statistics Inflation Calculator (www.bls.gov/data/inflation_calculator.htm)

Expected: C9. In your opinion, how much does a new quality queen-size mattress or mattress set cost? (maximum value) (Unadjusted price: August 2016=$1,110; August 2020=$1,061)
Actual: D7. How much did your current mattress cost? (among consumers who sleep on a queen-size mattress, maximum value) (Unadjusted price: August 2016=$930; August 2020=$915)
Willing to pay: D14a. 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 or set) (Unadjusted price: August 2016=$955; August 2020=$980)

Half of consumers believe that mattresses are fairly priced, although more than four in 10 believe they are too expensive.



C10. In your opinion, are mattresses…? (N=1039)



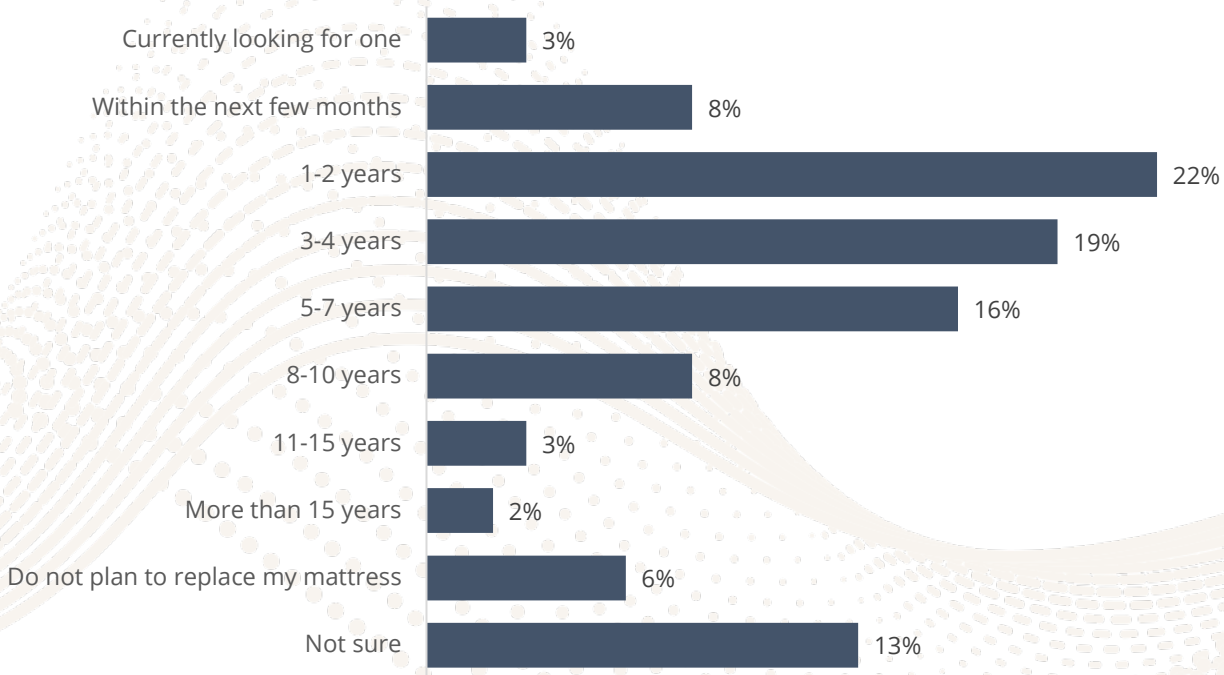
DETAILED FINDINGS

Triggers to Mattress Replacement: plans and reasons to buy a new mattress

Plans to Buy a New Mattress

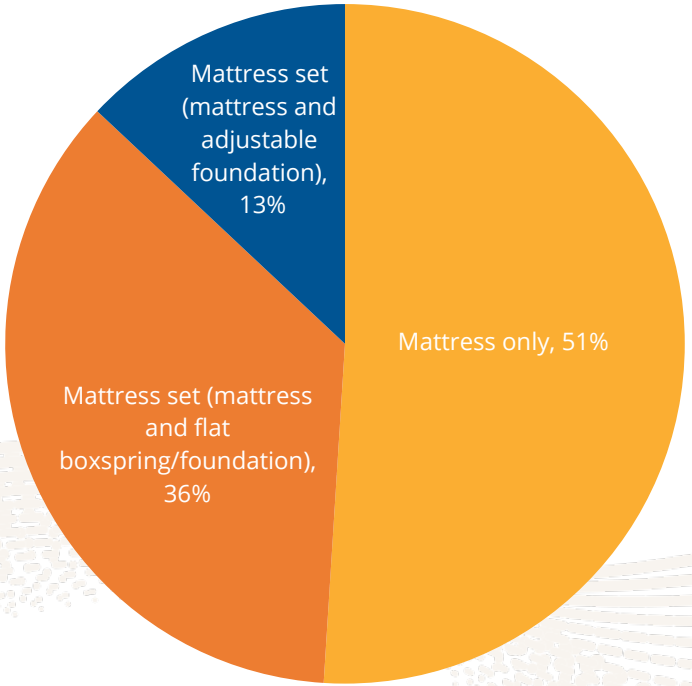
81% of respondents plan to replace their mattress, 33% plan to do so within the next two years.

Replacement Timeframe



D13. When do you plan to buy a new mattress or mattress set to replace the one you sleep on now? (N=1039)

Mattress Only vs. Mattress Set



D13a. Do you plan to buy a mattress only or a mattress set when you decide to replace the mattress you currently sleep on? (N=843)

Plans to Buy a New Mattress

More than 8 in 10 respondents who plan to replace their mattress would buy a King or Queen size and, on average, are willing to spend about $1300 for a mattress or mattress set.

Mattress Size



King/California King: 40%



Queen: 46%



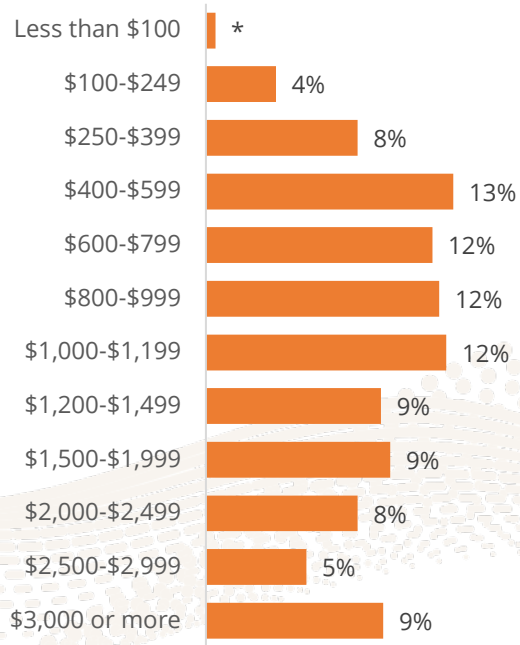
Full/Double: 10%



Twin: 4%

D14. If you were shopping for a new mattress or mattress set for yourself today, what size would you buy? (N=843)

Budget



Mean = $1297

D14a. What is the maximum amount you would be willing to pay for that mattress? (N=843)

Plans to Buy: Mattress Only

Mattress Size

King/California King: 38%

Queen: 46%

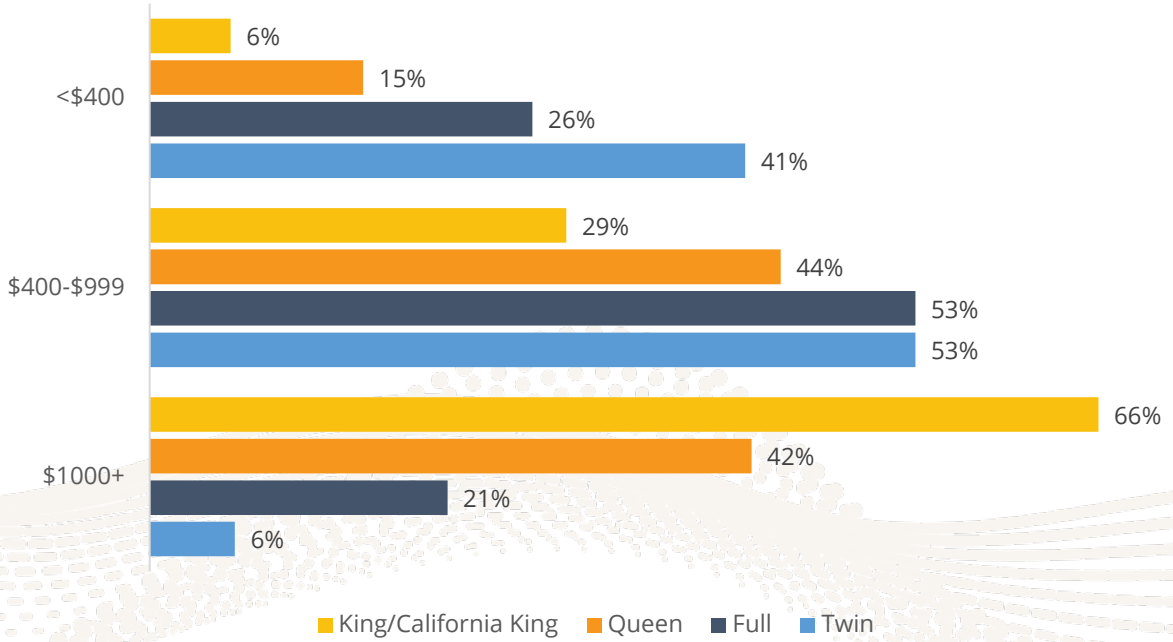
Full/Double: 10%

Twin: 5%

D14. If you were shopping for a new mattress or mattress set for yourself today, what size would you buy? (N=325)

Budget

King Mean = $1541; Queen Mean = $1012; Full Mean = $643; Twin Mean = $499



D14a. What is the maximum amount you would be willing to pay for that mattress? (N=325)

Plans to Buy: Mattress Set

Mattress Size

King/California King: 41%

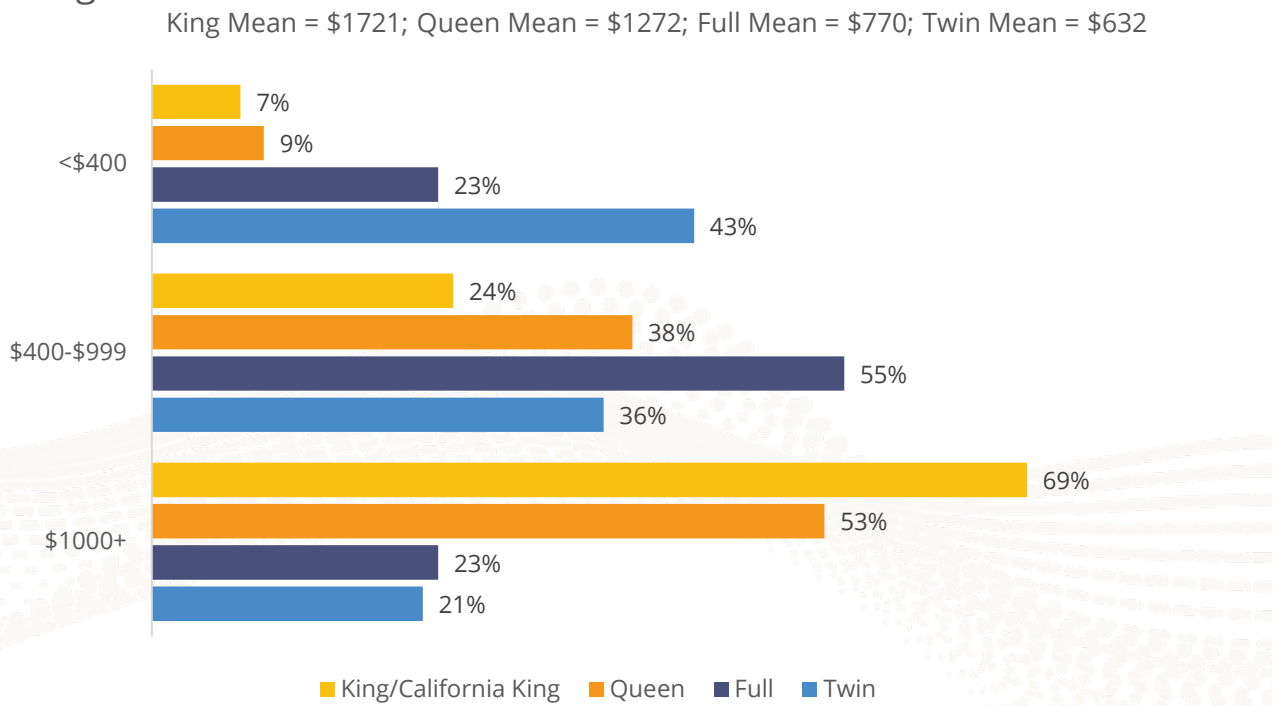
Queen: 46%

Full/Double: 10%

Twin: 3%

D14. If you were shopping for a new mattress or mattress set for yourself today, what size would you buy? (N=518)

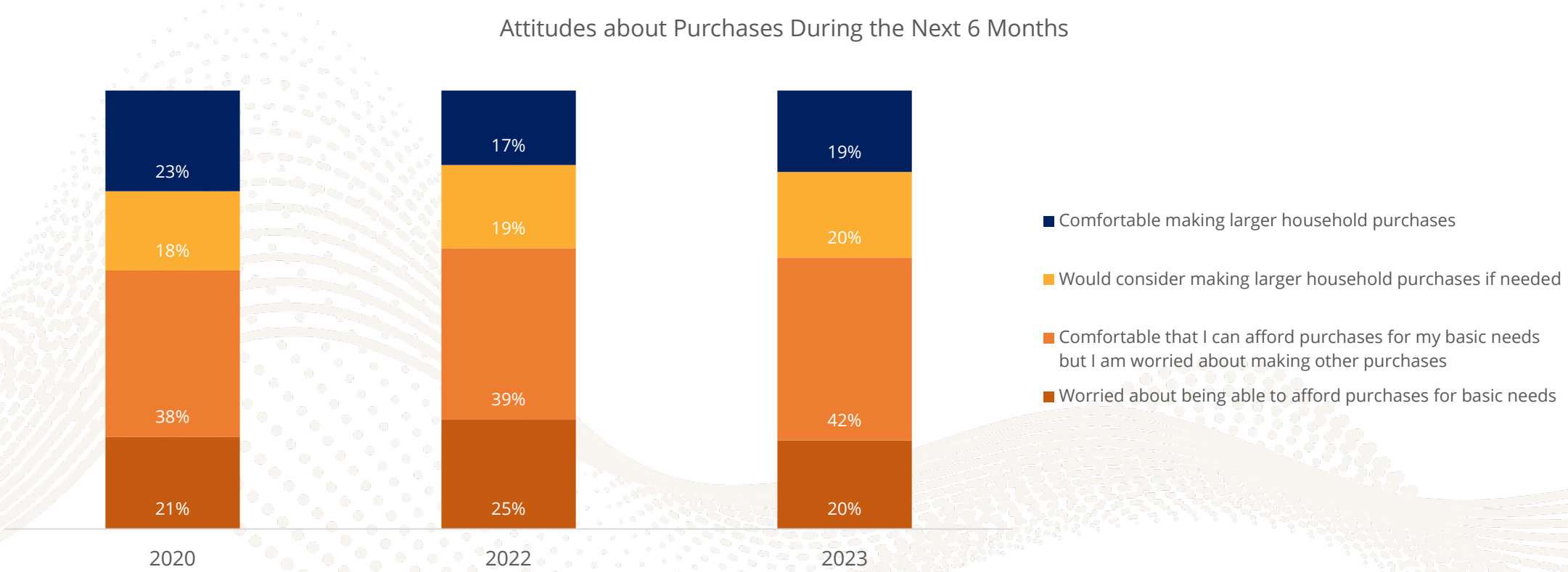
Budget



D14a. What is the maximum amount you would be willing to pay for that mattress? (N=518)

Consumer Sentiment for Larger Household Purchases

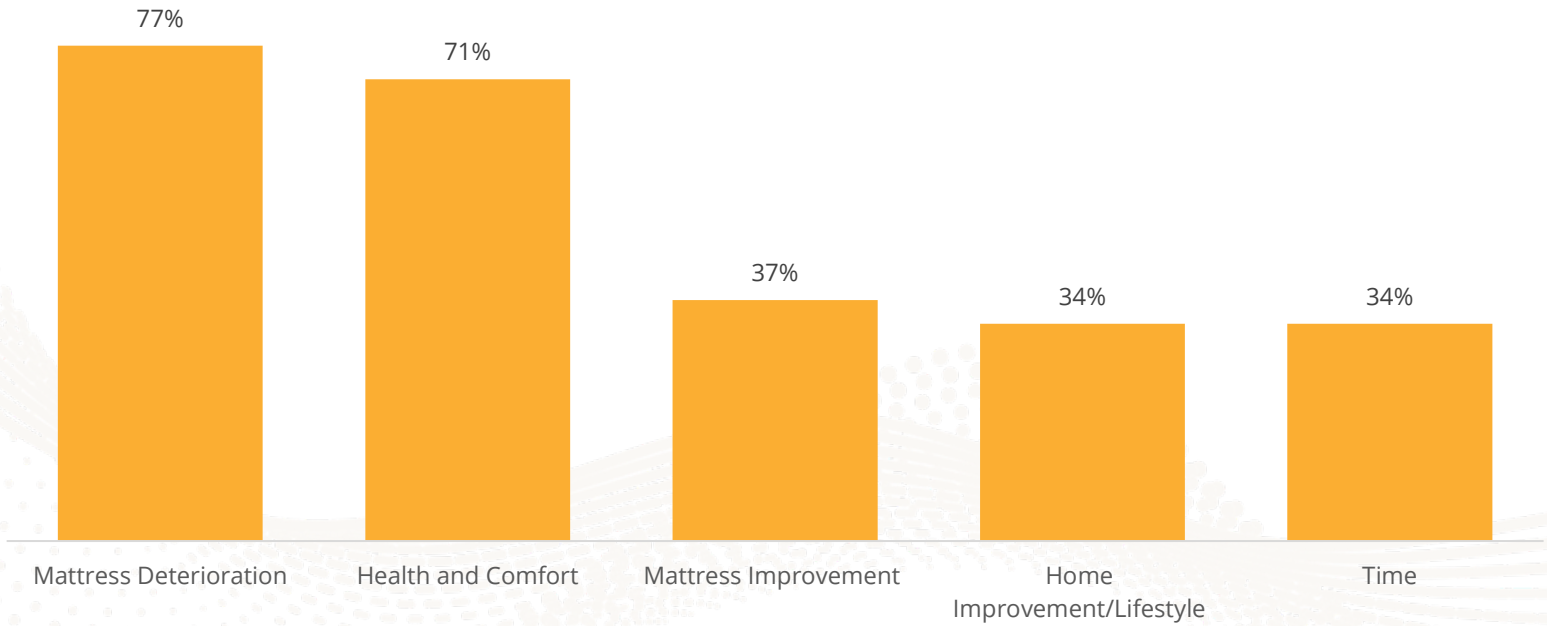
About two in 10 consumers feel comfortable making larger household purchase. Consumers are slightly less worried about being able to afford basic needs than in 2022.



H4. Which of the following best describes your attitudes about purchases during the next 6 months? (N=1039)

Triggers to Mattress Replacement by Category

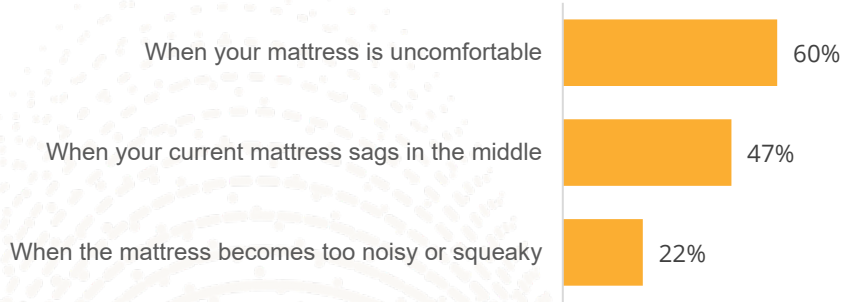
- Mattress deterioration and health and comfort are the most common triggers for mattress replacement.
- Home improvement/lifestyle is more likely to be cited as a trigger by those whose current mattress is 4 years old or less than those whose mattress is 5 years or older (37% vs. 28%).



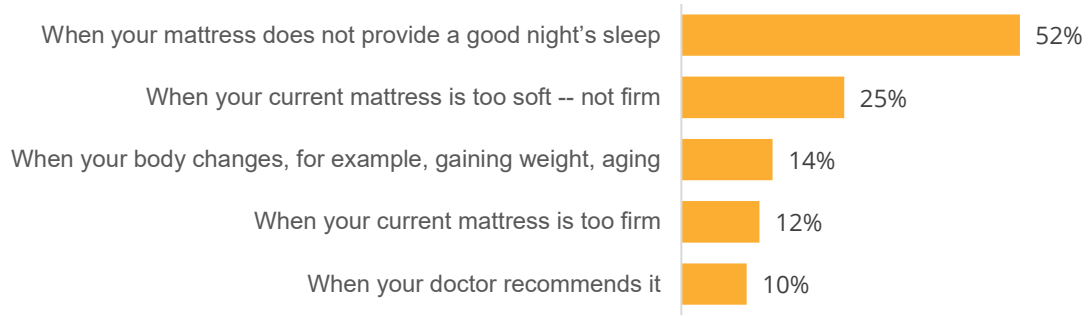
D15. Which of the following factors would influence your decision to purchase a new mattress? Please select all that apply. (N=843)

Triggers to Mattress Replacement

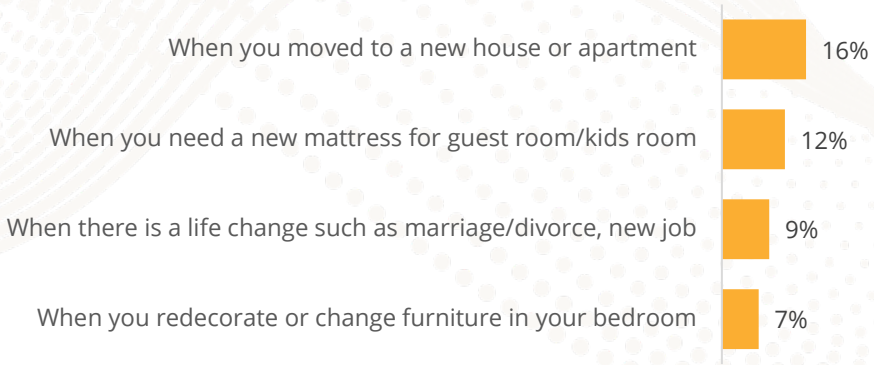
Mattress Deterioration



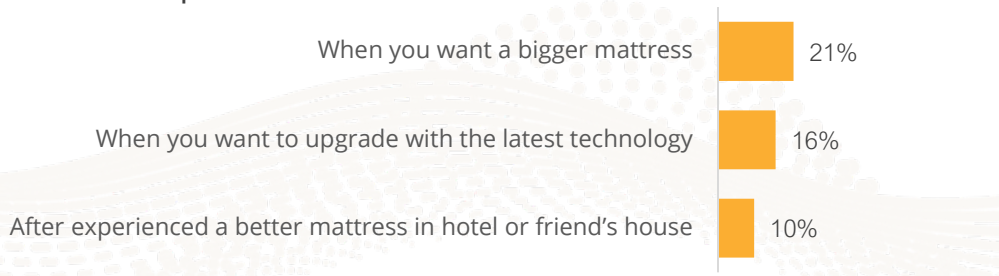
Health and Comfort



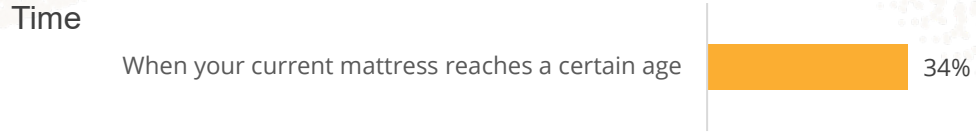
Home Improvement/ Lifestyle



Mattress Improvement



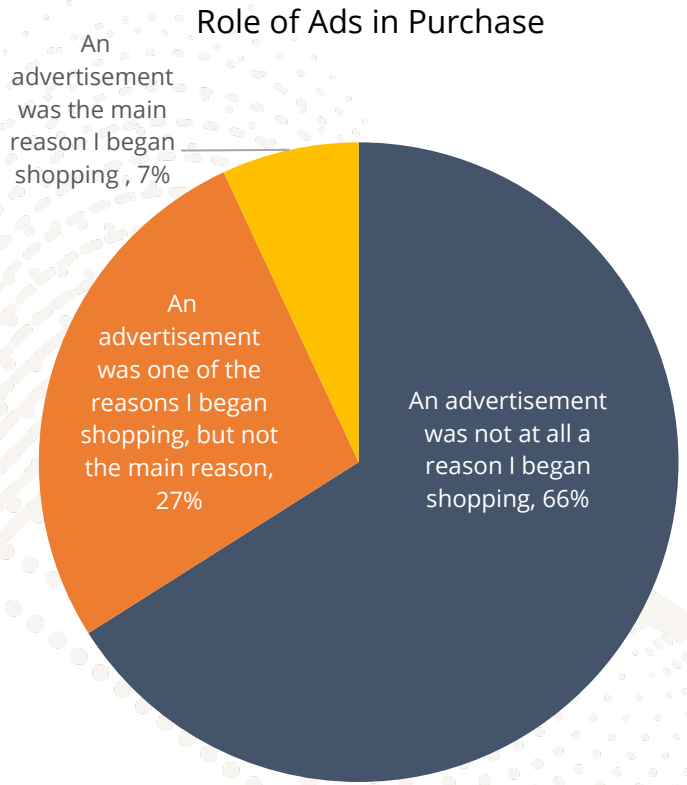
Time



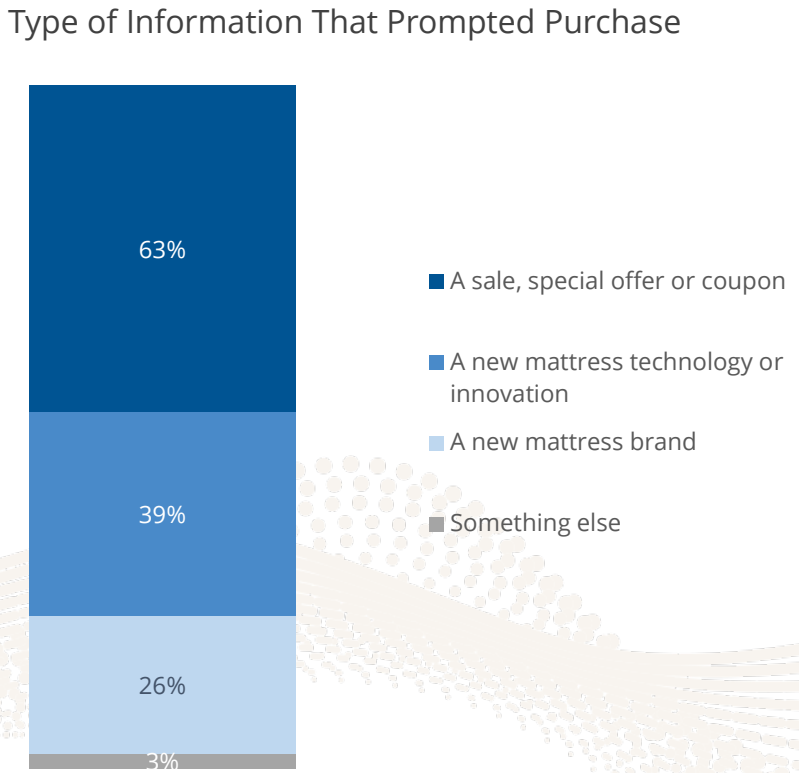
D15. Which of the following factors would influence your decision to purchase a new mattress? Please select all that apply. (N=843)

Role of Ads in Purchase

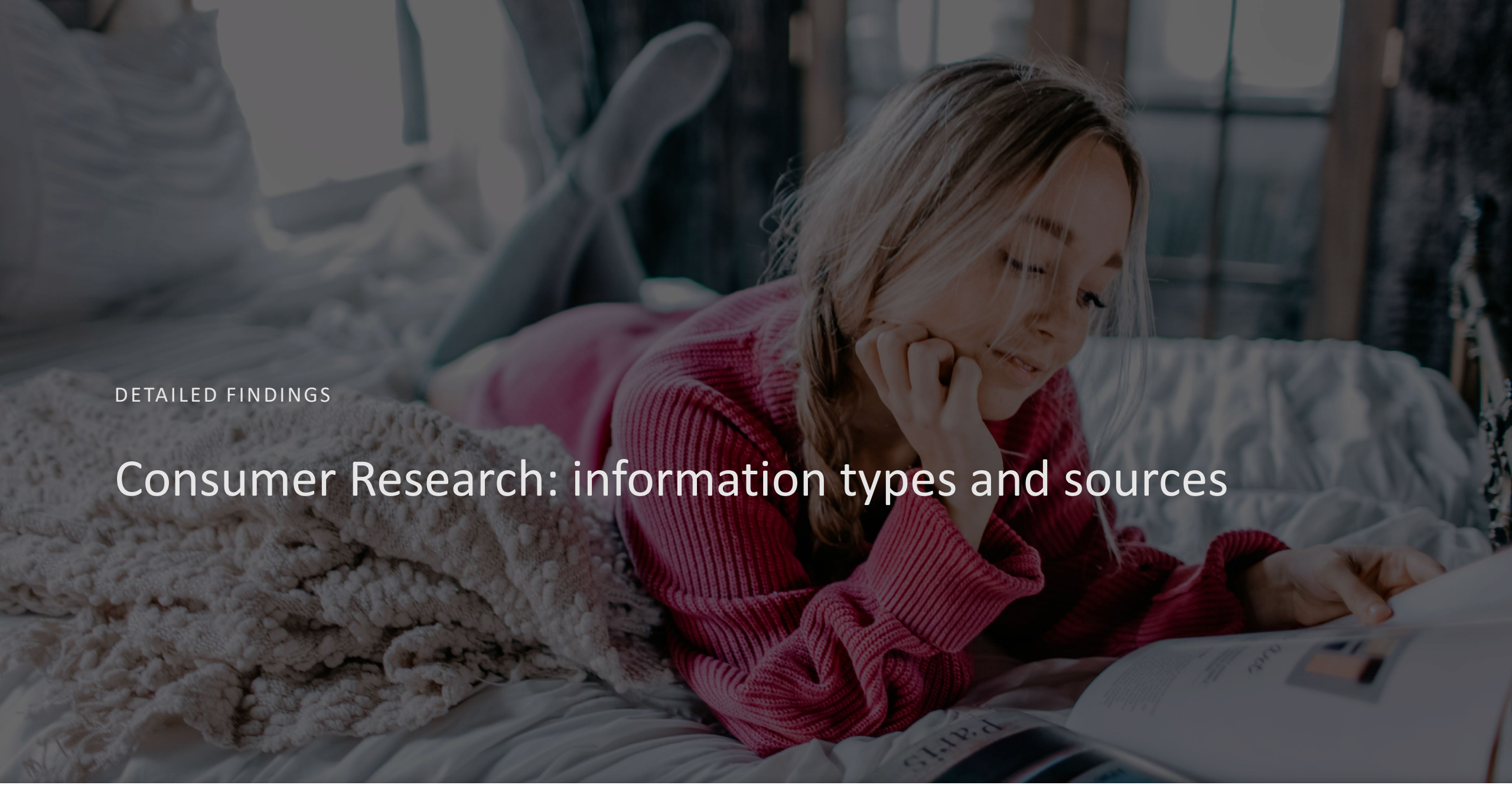
One-third of consumers who have purchased a mattress say that an advertisement was a reason they began shopping – typically a sale or special offer.



D3a. Which of the following best describes the role that seeing or hearing an advertisement had in prompting you to begin shopping for a new mattress? (N=980)



D3b. What information in the advertisement prompted you to begin shopping for a new mattress? Was it information about…? (N=333)

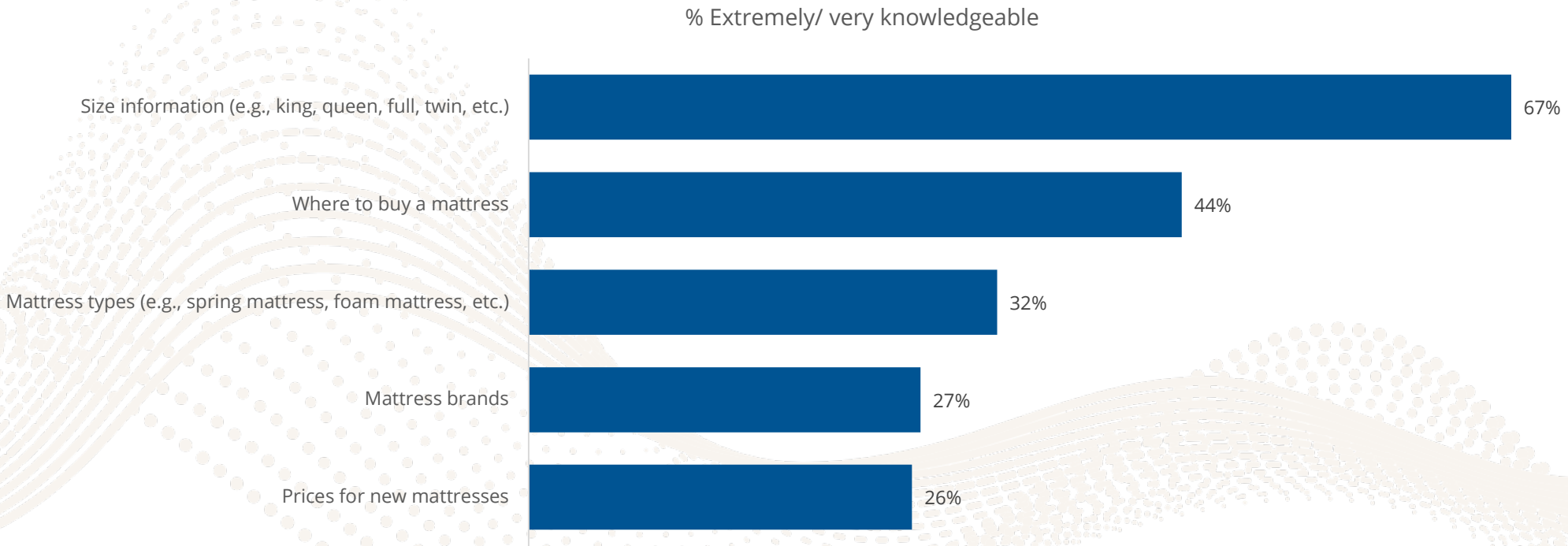


DETAILED FINDINGS

Consumer Research: information types and sources

Knowledge about Mattress Shopping Journey

While most consumers feel highly knowledgeable about mattress sizes, only one-quarter say they are highly knowledgeable about mattress brands.

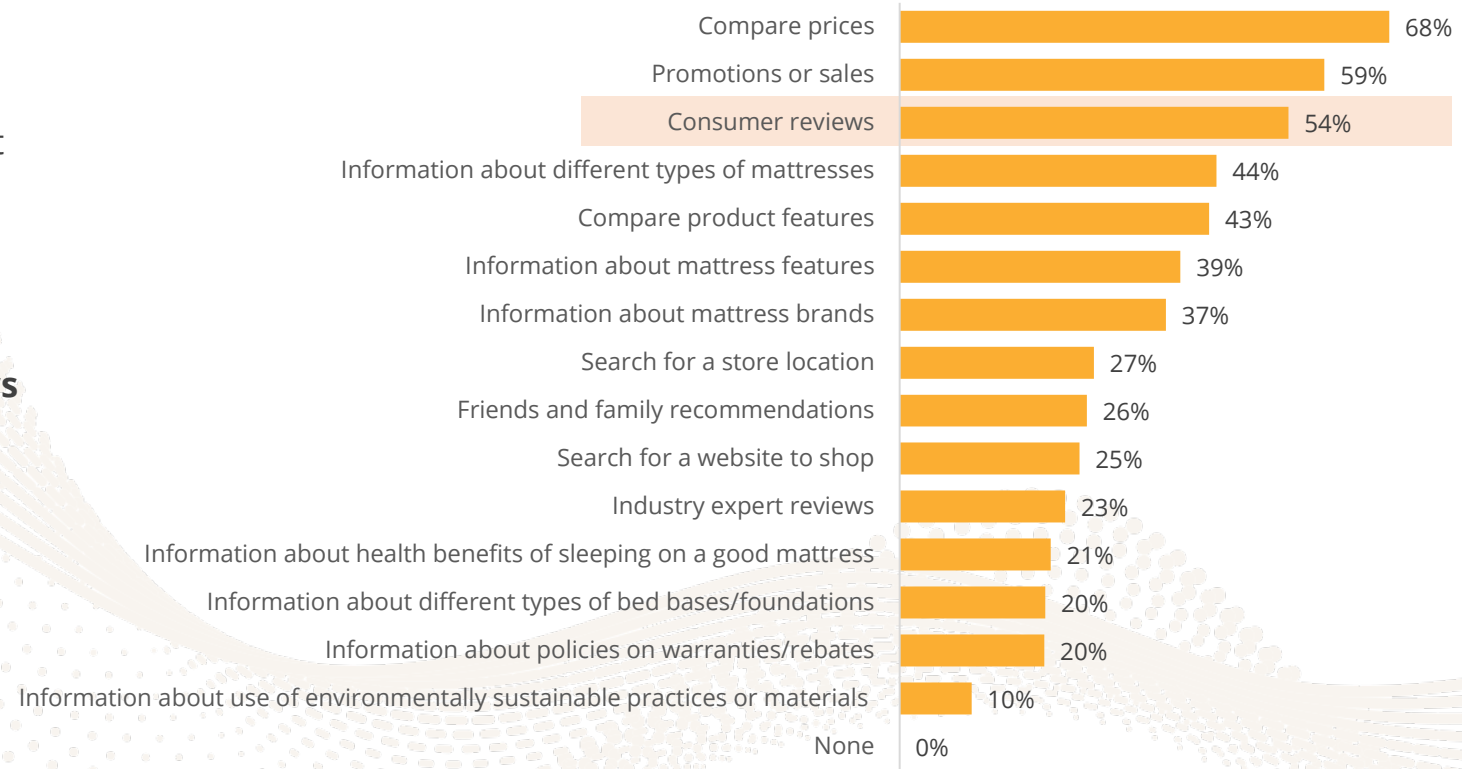


F9. How knowledgeable do you feel about each of the following: not at all knowledgeable, not too knowledgeable, somewhat knowledgeable, very knowledgeable, extremely knowledgeable ?(N=1039)

Information Sought

82% of respondents say that they first do research before purchasing a mattress.

After comparing prices and seeking promotions or sales, **consumer reviews** are the most common type of information sought by consumers.



F2. When you want to purchase a mattress, do you first do research before making the purchase? (N=1039)
F3. When you do research before purchasing a mattress, what type of information do you seek? Please select all that apply. (N=848)

Information Sources

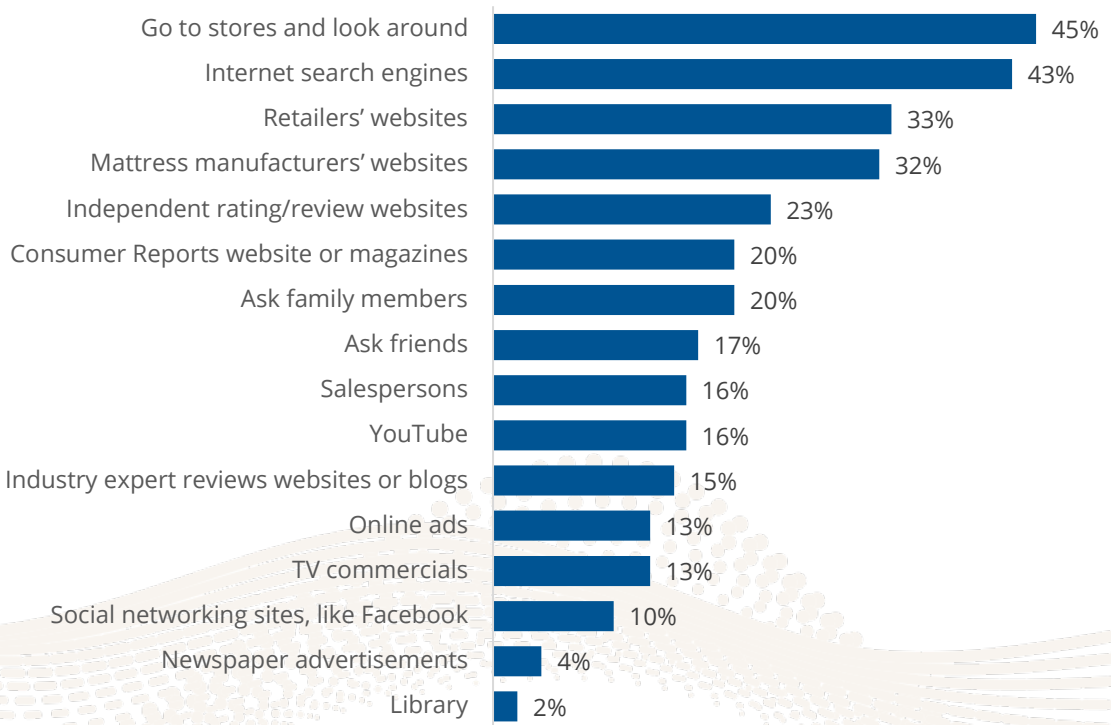
Consumers are as likely to find needed information from online search engines as to in-store visits.

The majority of consumers (67%) make up their minds about purchasing a mattress within two weeks

- A day or two 15%
- A few days to a week 27%
- 1-2 weeks 25%
- 3-4 weeks 15%
- 1 month or more 10%

Since 2020, use of several sources **has increased** including:

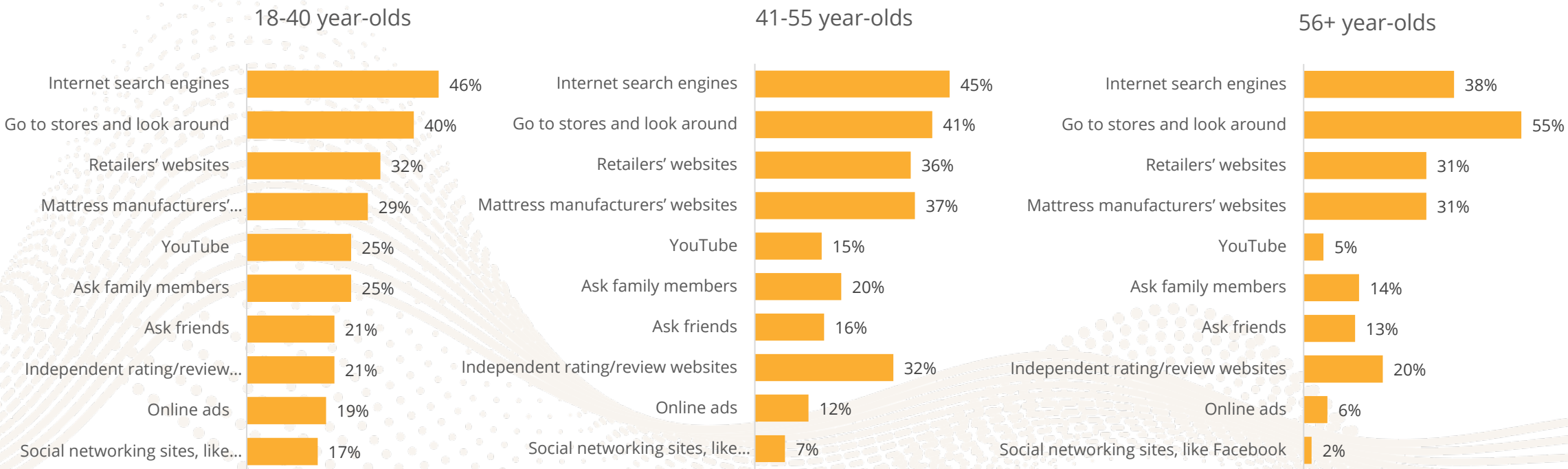
- Going to stores (36% in 2020 vs. 45% in 2023)
- Internet search engines (34% vs. 43%)
- Retailer's websites (25% vs. 33%)
- Mattress manufacturer's websites (23% vs. 32%)



F8. How much time do you spend researching and shopping for a mattress before making a purchase? (N=1039; 8% Not sure)
F4. When you want to purchase a mattress, where do you usually find the information you need? Please select all that apply. (N=1039; 3% said None)

Information sources vary by age

Younger consumers are most likely to find the information they need through internet searches, while older consumers tend to find information by going to stores.

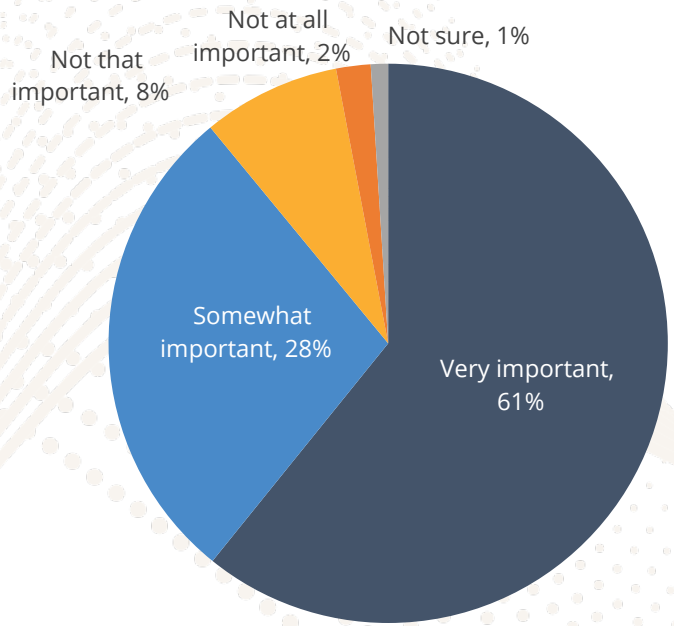


F4. When you want to purchase a mattress, where do you usually find the information you need? Please select all that apply. (N=1039; 3% said None)

Brick & Mortar Research

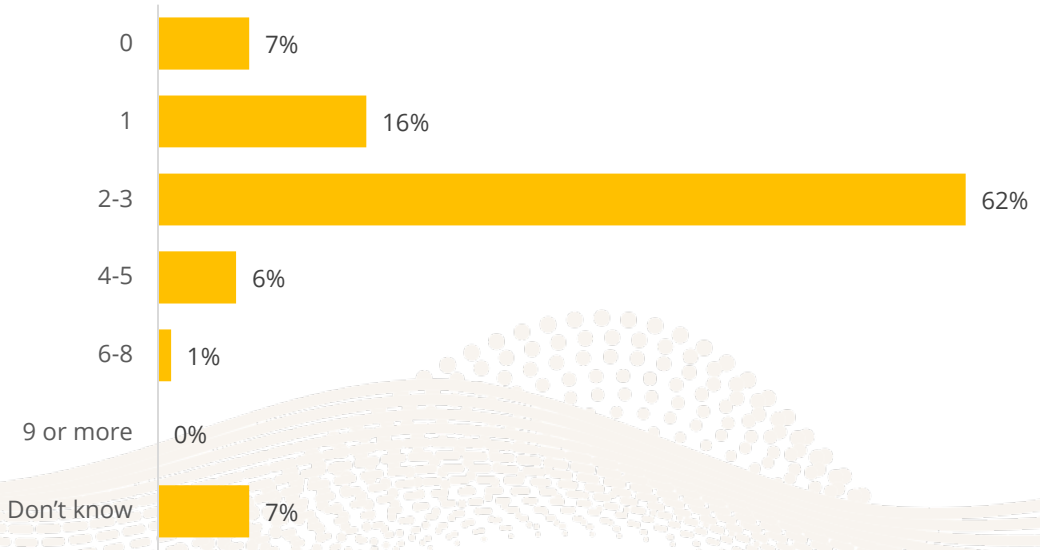
9 in 10 respondents said it is important to feel and try a mattress; the majority expected to visit 2-3 stores to do this.

Importance of feeling and trying a mattress



F7. How important is it to you to see, feel and try a mattress before buying it? (N=1039)

Number of stores



F6. When you want to buy a mattress, how many brick-and-mortar stores would you expect to visit before you make your selection? (N=1039)

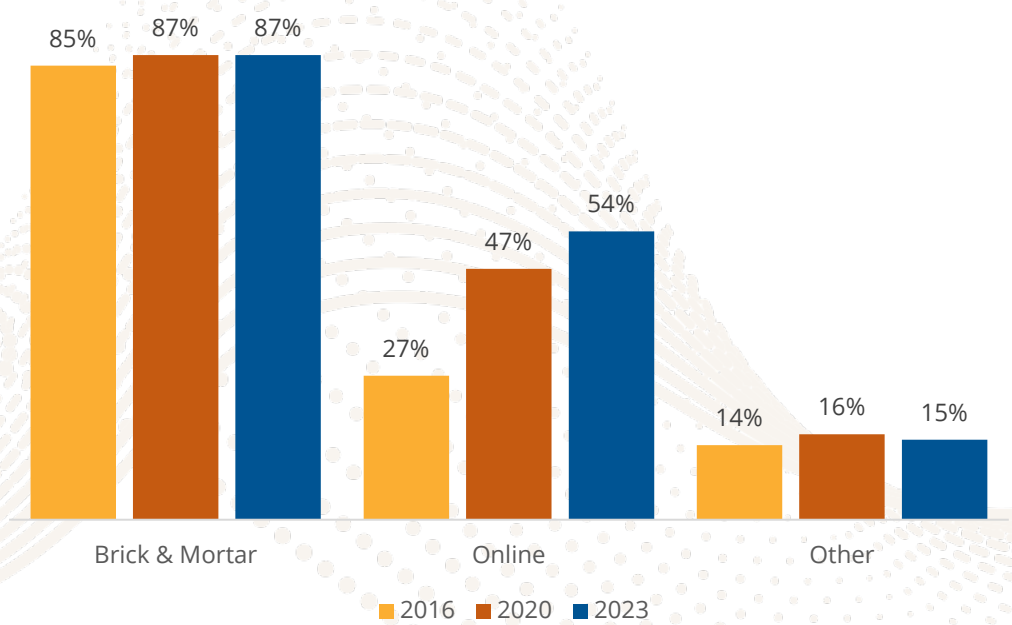


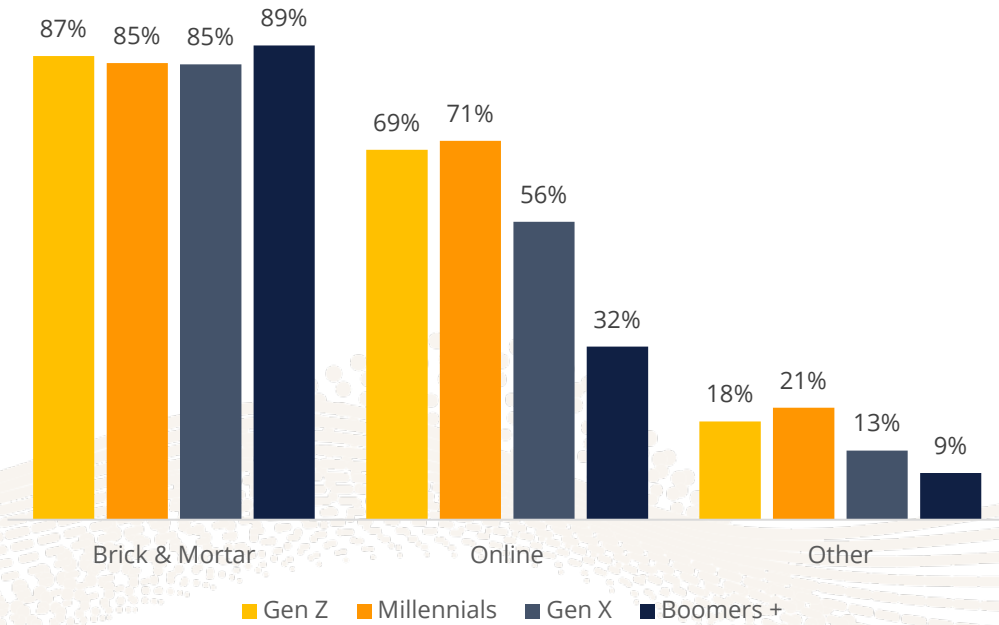
DETAILED FINDINGS

Purchase Experience

Brick & Mortar is still the preferred purchase location; however, most Gen Z and Millennial consumers would also purchase online.

Preference for purchasing online has continued to increase since 2020.



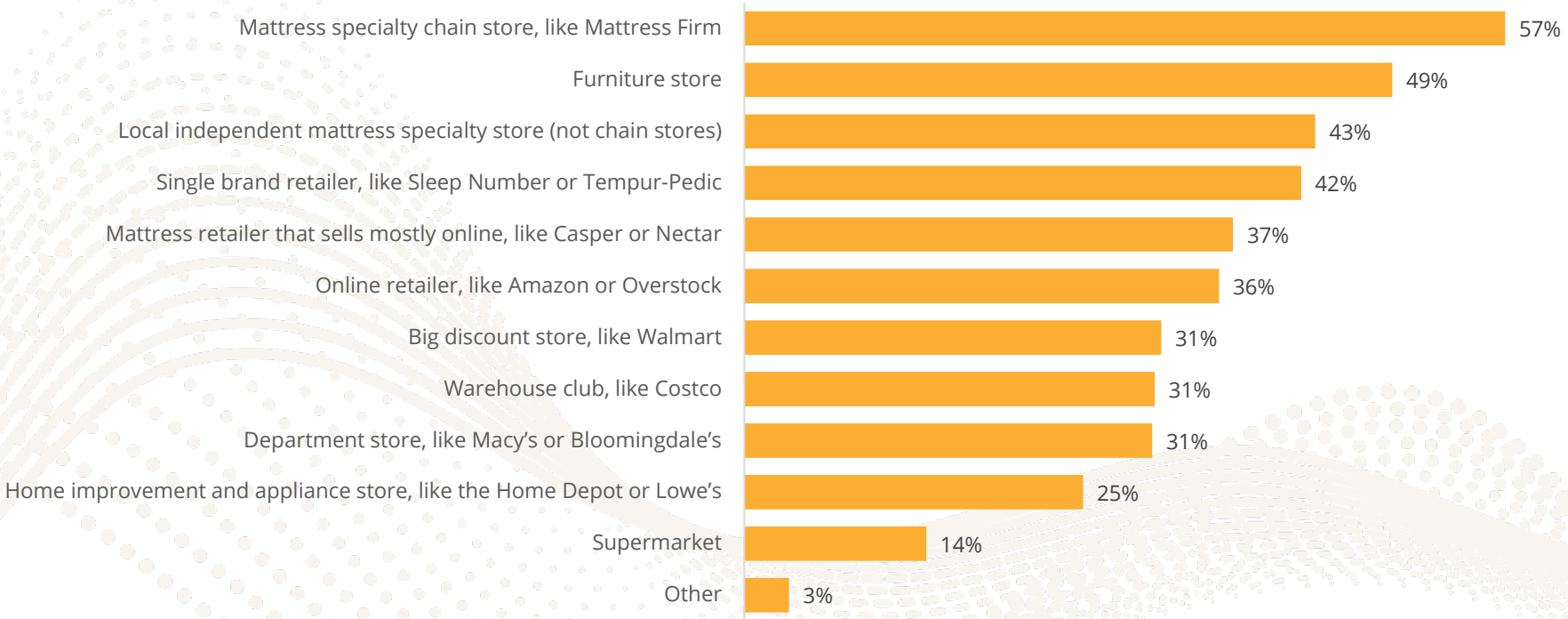


F10. If you were purchasing a new mattress today, from which of the following would you purchase your mattress, either by visiting their brick-and-mortar location, online or through other means? Please select all that apply. (N=1039)

Overall Retailer Type Preferences

Mattress specialty chain stores and furniture stores lead consumers' preferences for type of retailer.

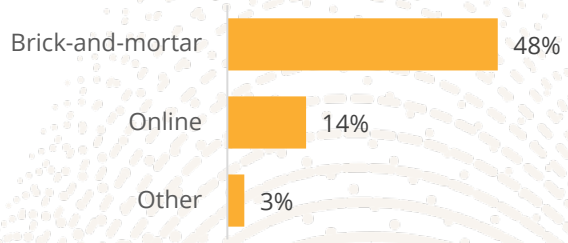
Since 2020, department stores have declined from among the top location preferences to least preferred locations (40% in 2020 vs. 31% in 2023).



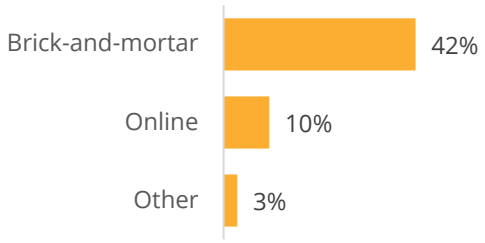
F10. If you were purchasing a new mattress today, from which of the following would you purchase your mattress, either by visiting their brick-and-mortar location, online or through other means? Please select all that apply. (N=1039)

Brick-and-Mortar vs. Online Preferences among Retailer Types

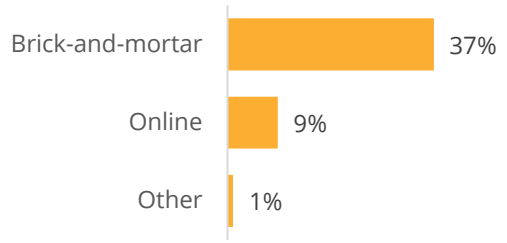
57% Mattress Specialty Chain



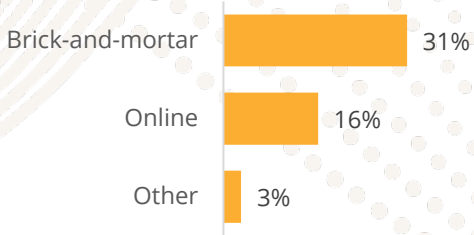
49% Furniture Store



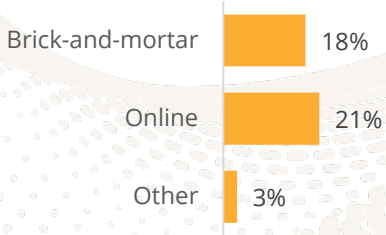
43% Local Independent Mattress Specialty Store



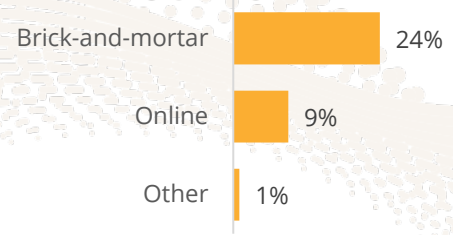
42% Single Brand Retailers



37% Mattress Retailers selling mostly online

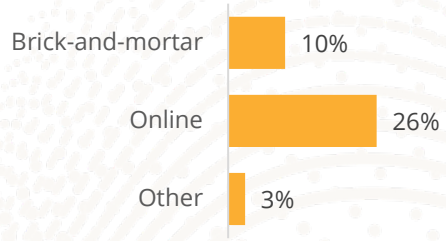


31% Department Store

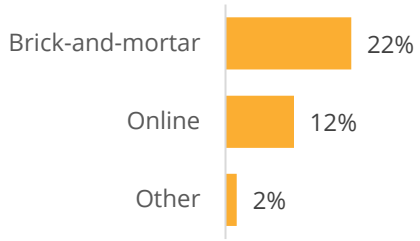


Brick-and-Mortar vs. Online Preferences among Retailer Types

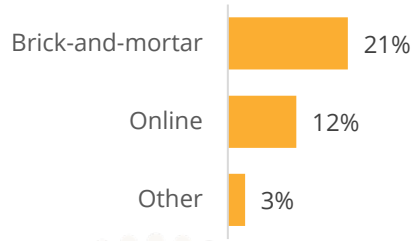
36% Online Retailers



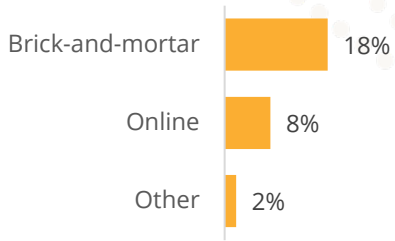
31% Warehouse Clubs



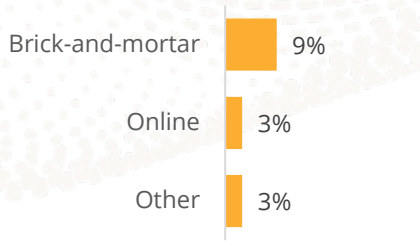
31% Big Discount Stores



25% Home Improvement and Appliance Stores



14% Supermarket

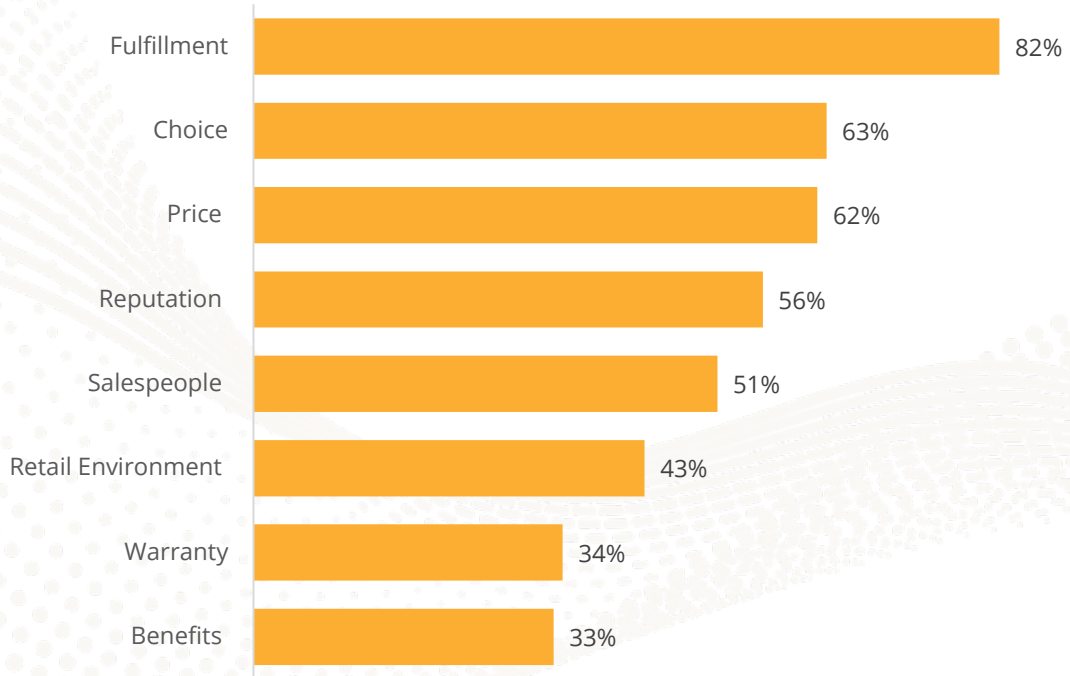


Purchase Drivers

- Nearly 30 features and characteristics were examined as potential influences on consumers' mattress purchase decisions:
  - **Price**: low prices or discounts, financing available
  - **Choice**: wide selection of mattress options, being able to comparison shop
  - **Reputation**: retailer reputation, well-known mattress brand, wide selection of mattress brands, want to support local retail businesses
  - **Benefits**: shares information about mattress construction and features, shares information about sleep/health benefits of mattresses, shares information about use of environmentally sustainable practices or materials
  - **Fulfillment**: free delivery, free pick-up of discarded/old mattress, easy returns, sends discarded mattress to recycler, offer of a free trial at home, "white glove" delivery, delivers compressed in a box, can avoid going to the store, online chat support, offers appointment-only shopping
  - **Warranty**: long-term warranty
  - **Retail environment**: cleanliness/appearance of store, displays mattresses the way they would look in the bedroom, attractive website design
  - **Salespeople**: non-pushy salespeople in store, knowledgeable salespeople in store

Purchase Drivers

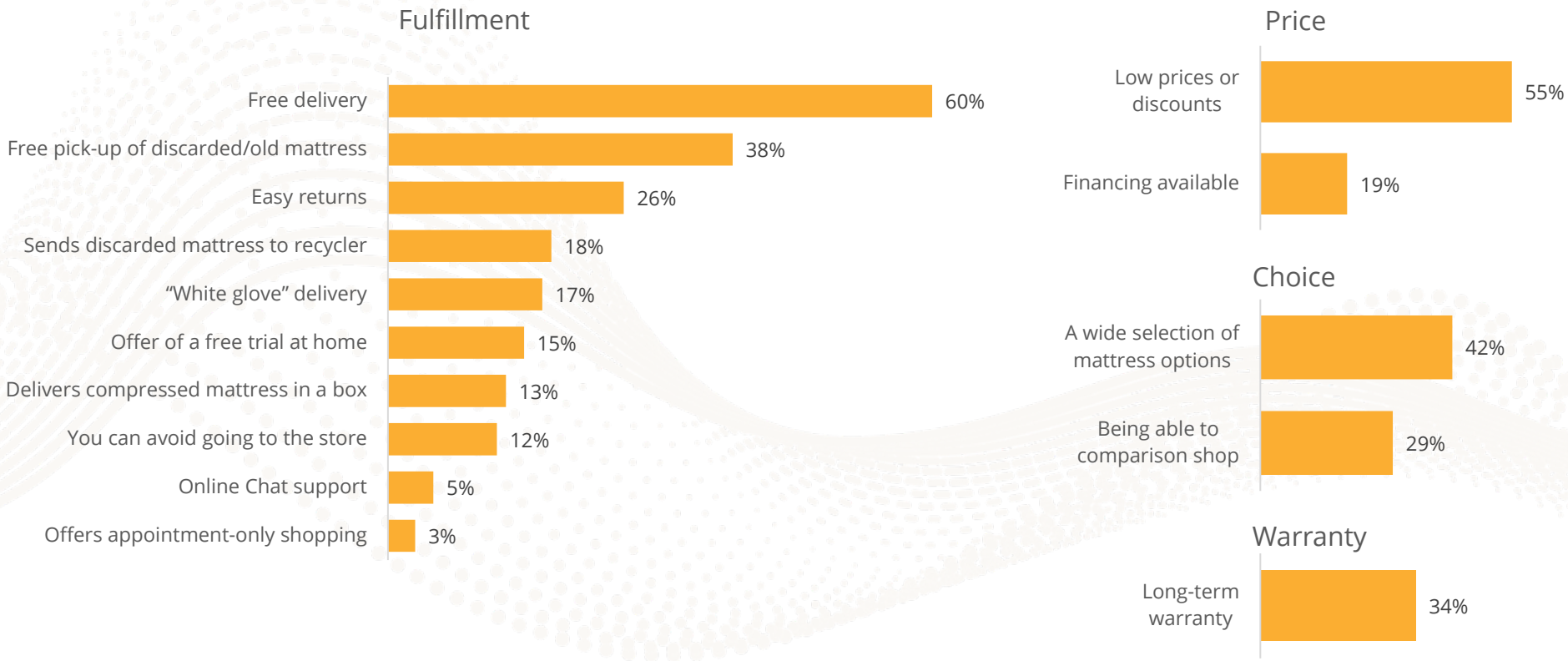
Customer service is the leading factor influencing the decision to purchase from a particular retailer.



F11. When you shop for a mattress, which of the following factors influence your decision to buy or not to buy from that particular retailer? Please select all that apply. (N=1039)

Purchase Drivers

Free delivery and low prices are the most common individual factors influencing purchase from a particular retailer.



F11. When you shop for a mattress, which of the following factors influence your decision to buy or not to buy from that particular retailer? Please select all that apply. (N=1039)

Purchase Drivers

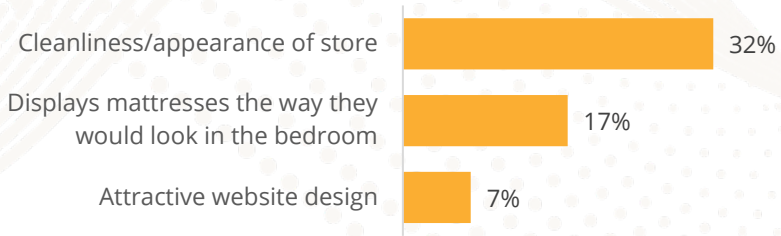
Salespeople



Reputation



Retail Environment



Benefits

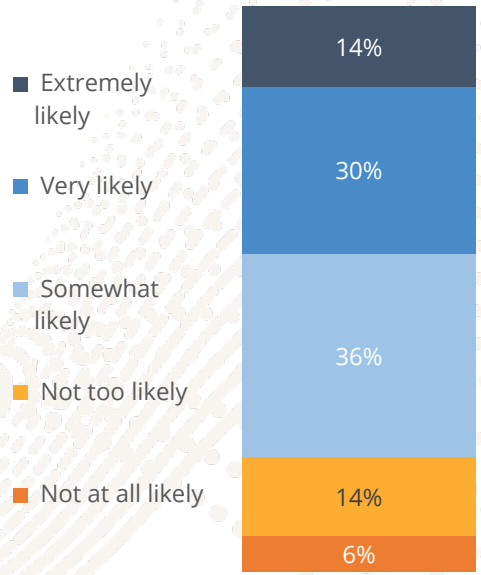


F11. When you shop for a mattress, which of the following factors influence your decision to buy or not to buy from that particular retailer? Please select all that apply. (N=1039)

Fewer than half of consumers say they are highly likely to purchase the same brand as their current mattress

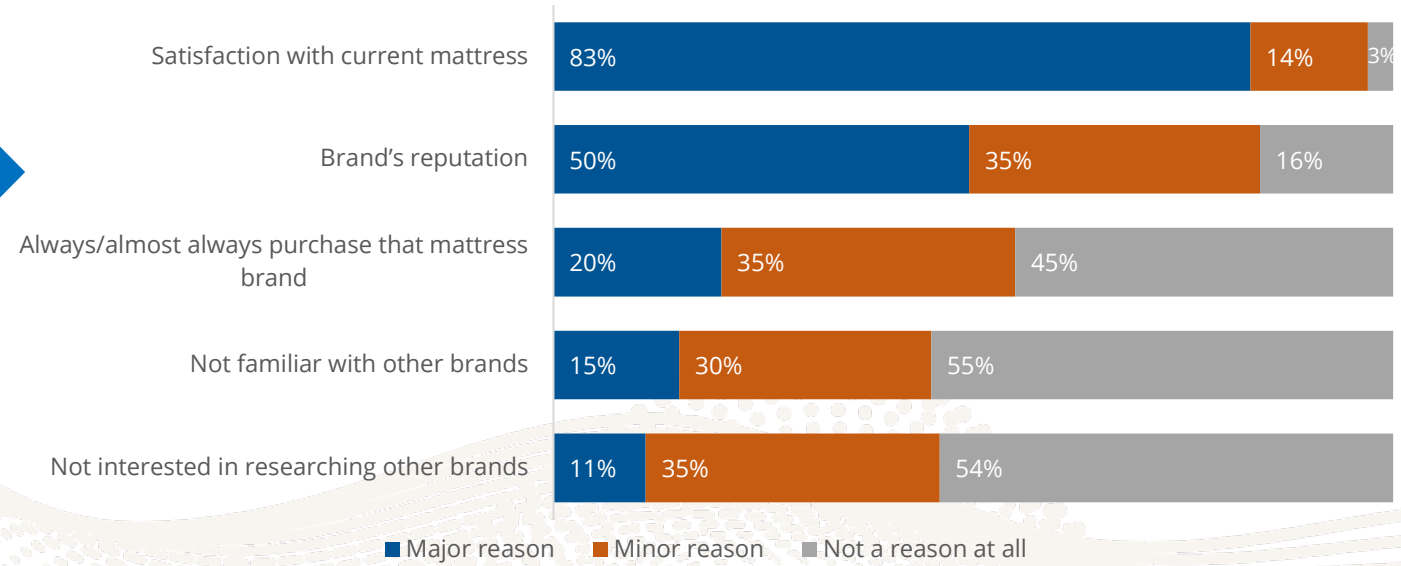
Top reasons for purchasing the same brand are satisfaction with the current mattress and the brand's reputation

Likelihood to Purchase Same Brand as Current Mattress



44% of consumers who plan to purchase a mattress are **extremely/ very likely to purchase the same brand**

Reasons for Planning to Purchase Same Brand

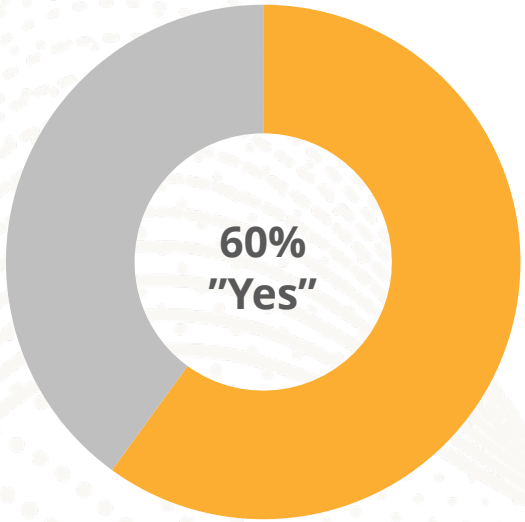


D14b. If you were shopping for a new mattress today, how likely would you be to purchase the same mattress brand as your current mattress? (Plan to buy a mattress; N=843)

D14c. To what extent is each of the following a reason why you are likely to purchase the same brand as your current mattress? (Extremely/ very likely to purchase same brand; N=369)

Customer Service Interactions

Spoke to Salesperson

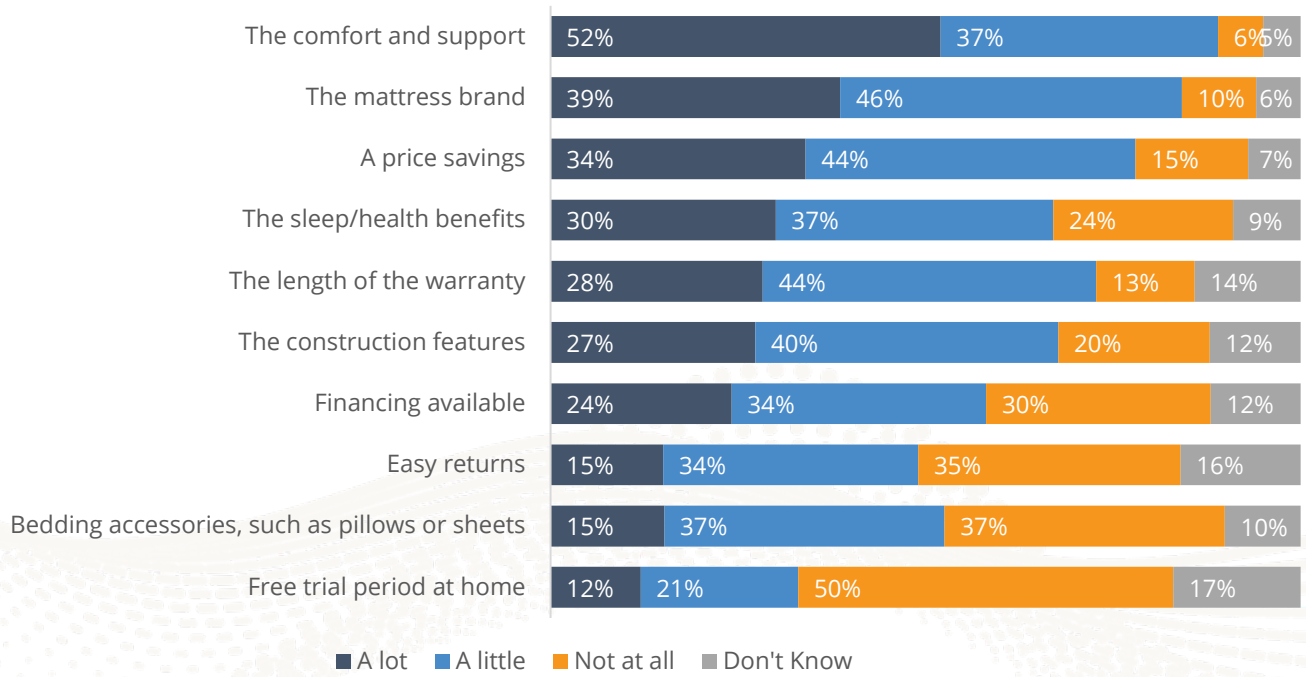


Older consumers are the most likely to have spoken to a salesperson or customer service representative:

- 70% of Boomers+
- 64% of Gen X
- 50% of Millennials
- 46% of Gen Z

F12b. When you last shopped for a mattress, did you talk to a salesperson or customer service representative? (N=1039; 3% never shopped)

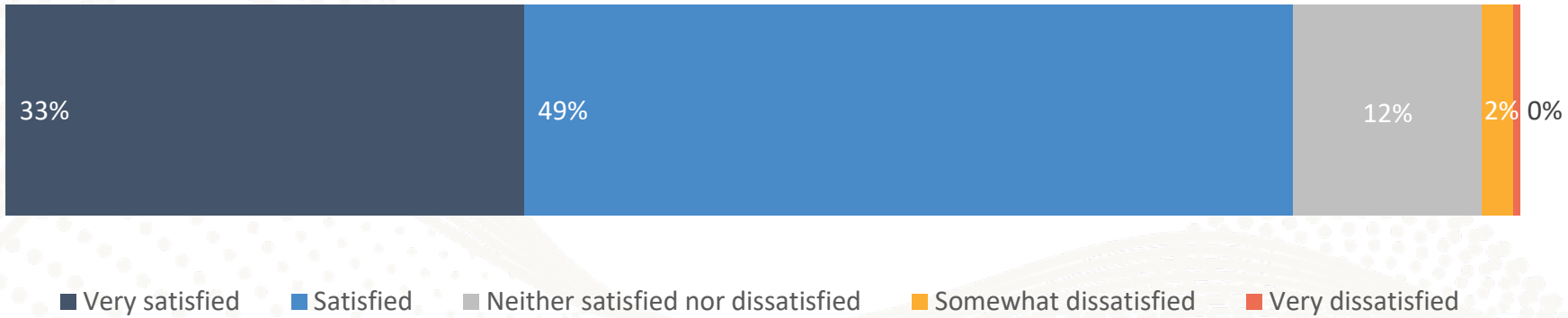
Extent Salesperson Discussed Topic



F14. When you last shopped for a mattress, how much did the salesperson talk about the following to sell you a mattress? (N=620)

Shopping Satisfaction

8 in 10 respondents were satisfied with their most recent shopping experience



F15. How satisfied were you with your retail experience when you last shopped for a mattress? (N=1012, 4% not sure)

Shopping Enjoyment and Knowledge Among Recent Purchasers

74% of consumers who recently purchased a mattress **enjoyed the shopping experience** a lot or a little.

- This is slightly less than the levels of enjoyment for those who recently purchased other furniture (81%) or bedding (79%).

77% of consumers who recently purchased a mattress **felt knowledgeable (very or somewhat) about shopping** for a mattress.

- This is slightly less than the levels of enjoyment for those who recently purchased other furniture (84%) or bedding (88%)

B1. For each item, please indicate how much you enjoyed shopping for it. If you have not purchased such an item within the past 2 years, please indicate that. (Purchased mattress in past two years; N=527)

B2. How knowledgeable did you feel shopping for each of the items that you purchased within the past 2 years? (Purchased mattress in past two years; N=527)



APPENDIX

Demographic Profile

Demographic Profile

	Total N=1039
Age	
18-40 years	41%
41-55 years	27%
56+ years	32%
Gender	
Male	51%
Female	49%
Region	
Northeast	18%
South	38%
Midwest	21%
West	23%
Urbanicity	
Urban	33%
Suburban	49%
Rural	18%

	Total N=1039
Hispanic Ethnicity	
Yes	15%
No	85%
Race	
White	71%
Black or African American	13%
Asian	5%
Other	11%
Marital Status	
Married/Living together	48%
Single	34%
Divorced/Separated/Widowed	18%
Children <18 years in Household	
Yes	56%
No	44%

Demographic Profile

	Total N=1039
Education	
Less than college degree	51%
College or more	49%
Household Income	
Less than $30,000	25%
$30,000 - $49,999	20%
$50,000 - $99,999	32%
$100,000 or more	23%
Mattress Research/Purchase Decision-Making Responsibilities	
I am solely responsible	59%
I am primarily responsible	18%
I participate in decision-making	23%
Employment Status	
Employed	57%
Not employed	43%