RAB Instant Background - Mattresses/Futons/Bedding

Consumer Insights

Who Buys

Profiling adults 18+ who purchased any type of mattress and box springs in the past year, along with those consumers who bought a bed frame and headboard, and shoppers who bought any bedding/linen items (blankets, pillows, sheets, etc.):

	Bought mattreess/box spring in last 12 months	Bought bed frame/headboard in last 12 months	Bought bedding in last 12 months (blankets/sheets, pillows/pillow cases, etc.)
Male	45.2%	46.3%	49.4%
Female	54.8%	53.7%	50.6%
18-24	11.1%	14.2%	21.5%
25-34	22.8%	29.1%	16.1%
35-44	17.8%	20.4%	14.6%
45-54	19.7%	16.1%	17.8%
55-64	16.2%	11.9%	15.1%
65+	12.4%	8.3%	15.0%
Household Income: \$100K+	40.5%	44.3%	37.7%
Household Income: \$75,000-\$99,999	15.2%	14.9%	8.9%
Household Income: \$60,000-\$74,999	10.8%	10.4%	8.4%
Household Income: \$50,000-\$59,999	5.6%	5.7%	5.4%
Household Income: \$40,000-\$49,999	6.4%	6.6%	4.7%
Household Income: \$30,000-\$39,999	7.4%	6.5%	10.7%
Household Income: \$20,000-\$29,999	7.0%	5.0%	9.7%
Household Income: Under \$20,000	7.2%	6.7%	14.5%
Race: White	77.9%	72.2%	74.0%
Race: Black/African American	12.1%	12.5%	12.8%
Race: Other Race/Multiple Classifications	10.0%	15.4%	13.1%
Hispanic, Latino or Spanish Origin	9.4%	13.2%	21.8%
Census Region: North East	15.6%	19.2%	18.0%
Census Region: South	41.9%	37.9%	48.3%
Census Region: Midwest	21.2%	18.1%	16.0%
Census Region: West	21.3%	24.9%	17.6%
Single	28.4%	31.6%	37.9%
Married	55.6%	54.2%	42.3%
Divorced/Separated/Widowed	16.0%	14.3%	19.8%
Total Radio Weekly Dayparts Cume:	90.1%	88.6%	86.9%

six months. Millennials made, on average, nearly four major purchases in the past year, while Gen X and baby boomers combined averaged just 2.8 major purchases during that time.

(Source: IBISWorld, 2020)

Monday - Sunday 24- Hour

(Source: GfK MRI Doublebase, 2020)

(Source: Sleep Savvy Magazine, 2020) While Millennials tend to spend less on each individual mattress purchase, they spend more money on sleep than older people.

An early 2020 poll found consumer spending is up as millennials made more major purchases in the last year and are most likely to make another major purchase in the next

Products and services segmentation for bed & mattress stores: Queen-sized mattresses, 41.4%; king-sized mattresses, 17.8%; full-sized mattresses, 18%; twin-sized mattresses,

The major market segmentation for bed & mattress stores: Consumers under the age of 35, 24.6%; consumers ages 36-51, 32.3%; consumers ages 52+, 43.1%.

What They Buy

(Source: IBISWorld, 2020)

(Source: GoodBed.com, 2020)

chamber, 6%; waterbed, 4%; futon, 4%; other, 2%.

(Source: Better Sleep Council, 2020)

(Source: IBISWorld, 2020)

(Source: Sleep Products, 2020)

(Source: Better Sleep Council, 2020)

(Source: SurveyGizmo, 2020)

(Source: Better Sleep Council, 2020)

4.1%; Illinois, 3.9%; Georgia, 3.6%; Ohio, 3.3%.

(Source: Furniture Today, 2020)

(Source: J.D. Power, 2020)

(Source: Better Sleep Council, 2020)

(Source: Bureau of Labor Statistics, 2020)

months, 13%; 3-6 months, 2%; >6 months, 1%.

(Source: Better Sleep Council, 2020)

(Source: Better Sleep Council, 2020)

(Source: Home Furnishings Business, 2020)

(Source: J.D. Power, 2020)

(Source: J.D. Power, 2020)

Business Information

same three-month period in 2018.

Why They Buy

away, 22%.

(Source: Home Furnishings Business, 2020)

How They Buy

Simmons/Beautyrest, Casper and Sealy were other brands that scored highest.

Simmons/Beautyrest and Ashley Sleep were other brands that scored the highest.

Shoppers who want to shop in-store are willing to travel up to 20 to 40 minutes to do so

(Source: IBISWorld, 2020)

(Source: Sleep Products, 2020)

17.2%, other mattresses, foundations and bedding, 5.6%.

(Source: GoodBed.com, 2020)

The most common materials used in the support layer of mattresses include innerspring, regular foam, air, latex or water.

Millennial consumers replace mattress more often than Baby Boomers (every 5.3 years vs. Boomers 10.7 years)

The most common materials used in the comfort layer of mattresses include memory foam, regular foam, gel, latex, or natural fibers.

23%; mattress pads, 21%; bed covers and decorative pillows, 20%. (Source: Sleep Products, 2020)

Traditional innerspring mattresses support the body with springs and are the least costly kind of mattress. Due to their value and perceived lesser quality, innerspring mattresses lost popularity during the period as more consumers were able to afford premium, higher-end alternatives. (Source: IBISWorld, 2020)

Specialty mattresses that support the body with memory foam or other polyurethane or latex materials have increasingly penetrated the mainstream mattress retail segment.

Different kinds of mattress consumers purchased in 2020: foam mattress made without springs or coils, 48%; spring mattress, 25%; sleeper/sofa, 11%; air/adjustable air

7 in 10 Millennials buy bedding accessories along with a new mattress: ,mattress foundations, 66%; pillows, 36%; sheets, 34%; mattress protectors, 27%; comforters or duvets,

When They Buy

Each year, the Better Sleep Council sponsors "Better Sleep Month" in May.

Where consumers purchased mattresses online in 2020: Department store, 31%; site that only sells mattresses, 22%; Amazon, 19%; big box store, 14%; furniture store, 8%; other e-tailer, 6%.

13%.

Where They Buy

(Source: SurveyGizmo, 2020) 54% of shoppers purchased their mattress online, while 46% shopped in-store.

How far consumers are willing to travel to buy furniture, according to an October 2020 poll: Less than 5 miles, 5%; 5-9 miles, 13%; 10-24 miles, 39%; 25-49 miles, 28%; 50 miles+,

Where consumers purchased mattresses in-store in 2020: Mattress specialist, 43%; department stores, 21%; furniture stores, 15%; big box stores, 15%; other, 6%.

(Source: Home Furnishings Business, 2020)

The top three bedding retailers in the U.S., based on 2019 sales (totals in millions): 1. Mattress Firm, \$2,800; 2. Sleep Number, \$1,400; 3. Ashley HomeStore, \$900.

Business concentration of bed & mattresses stores across the U.S. in 2020: California, 9.7%; Texas, 8.3%; Florida, 7.8%, New York, 6.5%; North Carolina, 4.2%; Pennsylvania,

(Source: J.D. Power, 2020) Tempur-Pedic ranks highest in customer satisfaction among retail mattresses with a score of 881. Sleep Number (870) ranks second and Serta (845) ranks third. Sealy,

Among online mattress retailers, Purple ranks highest in customer satisfaction, with a score of 875. Sleep Number (859) ranks second and Ashley Sleep (857) ranks third.

Consumers participate in these activities PRIOR to purchasing a new mattress: looking at online retailers/websites, 56%; Google searches, 54%; searching for and reading online reviews, 51%; asking friends/family for recommendations, 44%; visiting a brick-and-mortar mattress retailer, 41%; visiting a brick-and-mortar retailer/department store that also sells mattresses, 39%; social media, 39%; reviewing miscellaneous online resources, 28%; looking through miscellaneous books/magazines/pamphlets, 19%. (Source: Better Sleep Council, 2020)

How long consumers typically shop before making a large furniture purchase, according to an October 2020 poll: < 1 week, 26%; 1-2 weeks, 31%; 2 weeks-1 month, 27%; 1-3

About 61% of shoppers who purchase mattresses/bedding online do so because of COVID-19 concerns; other reasons include a better price, it's easier and fast/free shipping.

How many retailers consumers typically shop before making a furniture purchase: 1, 21%; 2, 31%; 3, 30%; 4, 9%; 5, 2%; more than 5, 6%. (Source: Home Furnishings Business, 2020)

20.38%; ecommerce, 19.53%; shopping by appointment, 17.03%; virtual shopping via text/phone, 15.10%.

Furniture continues to be a top category of major purchases, increasing from 22% in 2017 to 26% in 2019.

Nearly seven in 10 Americans (69%) say they plan to make a large purchase in the next six months, up 10% from two years ago.

In 2019, the U.S. average expenditure on mattresses and springs amounted to \$93.3 per consumer unit.

What motivates consumers to make a furniture purchase, according to an October 2020 poll: Quality of product, 32.08%; reputation of the manufacturer or brand, 21.89%; price of product, 17.36%; design of product, 16.23%; reputation of the retailer, 7.92%; service provided by the manufacturer or retailer, 4.53%. (Source: Home Furnishings Business, 2020)

Changes that were most important to consumers shopping for furniture since COVID-19 pandemic restrictions: Mandatory masks for all personnel, 31.84%; frequent sanitizing,

When shopping for new mattresses, consumers say comfort is a significantly higher priority than price, according to J.D. Power's 2020 Mattress Satisfaction Report.

What Millennials believe are the most important factors for health and well-being: 43%, a good night's sleep; 40%, healthy diet; 37%, physical exercise.

Reasons consumers gave for not shopping in-store in 2020: COVID-19 concerns, 61%; better price online, 41%; lack of time to shop in person, 23%; mattress store is too far

(Source: Sleep Products, 2020) When shopping for new mattresses, consumers say comfort is a significantly higher priority than price.

Total unit shipments of mattresses, as well as stationary and motion foundations, from U.S. producers and imports rose 2.2% in the fourth quarter of 2019, compared with the

(Source: Bedding Market Quarterly, 2020) Most consumers prefer to have their mattress delivered to their house, and close to two-thirds prefer to receive their mattress folded, rolled or compressed (boxed).

Revenue for bed & mattress stores in the U.S. is expected to be \$14.2 billion in 2020. (Source: IBISWorld, 2020)

(Source: Better Sleep Council, 2020)

(Source: Nielsen Audio, 2020)

(Source: GfK MRI Doublebase, 2020)

Why Radio

etc., in the previous year.

for your particular needs.

www.sleepproducts.org

BEDTimes:

(Source: GoodBed.com, 2020)

every week.

(Source: Better Sleep Council, 2021)

(Source: Sleep Savvy Magazine, 2020)

(Source: Sleep Savvy Magazine, 2020)

Each week, radio reaches 87.1% of persons ages 18+, and 59.1% of these consumers on a daily basis. In all, more than 221 million Americans ages 18-and-older listen to radio

Consumers are shopping both online and in-store for mattresses and looking at an average of three to four different channels on their shopping journey.

The weekly reach of radio includes 90.1% of consumers 18+ who purchased any mattress/box spring sets in the last year, along with 88.6% of those who bought a bed frame/headboard. Also reached each week by radio are 86.9% of those shoppers who purchased any type of bedding products such as blankets, sheets, pillows, comforters,

Miscellaneous Industry Facts or Category Trivia Mattresses have softer comfort layers on top, along with firmer support layers below. The combination of comfort and support materials determine whether a mattress is right

Relevant Links International Sleep Products Association:

Furniture/Today: www.furnituretoday.com

Home Furnishings Business: www.furniturecore.com

www.bedtimesmagazine.com

Sleep Savvy:

(Source: RAB, 2020)

www.sleepsavvymagazine.com