

Colonial study finds a growing mattress purchase gap

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HIGH POINT — More than one-third of the consumers who researched or shopped for a mattress in the past year did not buy, a new study reveals.

The study, conducted for display and branding specialist Colonial LLC, based here, found that the mattress shoppers are worried about spending too much money on a new bed, not liking their new bed once they get it home, and buying the wrong product.

"This worry and skepticism is driving the purchase gap," said Mark Hobson, Colonial's president.

The study found that 36.2% of consumers who researched or shopped for a new mattress in the past 12 months did not buy anywhere.

Hobson called that a "shocking statistic," and Britt Beemer, the chairman of Americas Research Group, which conducted the study, said the mattress purchase gap is rising.

"That number is up more than six fold, compared to when we first asked consumers that question some years ago," Beemer said. "We have never seen the same degree of concern over finding the right mattress product for their needs as we saw in this study."

ARG interviewed 1,000 qualified consumers who had researched, shopped, or purchased a new mattress in the prior 12 months. More than 516 hours of phone interviews were conducted in the New York, Atlanta, Chicago, Houston and Los Angeles markets, Beemer said.

Hobson commissioned the study to investigate the shopping habits and motivations of today's mattress consumer, to understand what is behind recent store traffic declines and to determine what, if anything, can be done to reverse the trend and increase sales.

The study found that consumers are generally confused by the many choices of mattress types, saying that the beds look the same and fearing their purchase won't hold up in their home.

Hobson said that "a surprisingly high number" of consumers (18.9%) said they were not happy with a prior mattress purchase, noting that it became less comfortable over time, developed body impressions, or no longer gave them



Mark Hobson

the support they expected. Some said it didn't feel the same as the floor model, he said.

Those concerns drove 44.6% to do mattress research rather than browse their local retailer or visit a store where they had bought before, the study found.

Of those doing research, 42.4% went online, with the majority going first to a retailer or manufacturer website, looking mainly for product construction information and where to shop, the study said.

Eleven percent of the consumers said they searched online for the "best mattress," and 9.2% said they visited mattress review sites. When there, they looked first at positive reviews and then at the negative reviews, if they found any. More than 20% said that they normally go online to research all products, the study found.

While only 4.7% of those consumers doing research online said they had planned to buy online, another 20.9% decided to buy online after researching and shopping, according to the study.

Overall, 31.1% of consumers say they are generally shopping less in stores these days and more online. Yet only 32.1% are even aware that there are mattress companies that sell only beds online, the study said.

"Those two facts together indicate that the current store traffic declines will continue unless brick-and-mortar retailers and traditional brands find ways to push back soon," Hobson said. "But the fact that 36.2% who researched or shopped but did not buy anywhere suggests a huge traffic and sales opportunity remains."

He said key survey findings show support for brick-and-mortar mattress retailers, including:

- **75%** of all consumers say they still want to buy their mattress at a retail mattress store.
- **73%** of consumers say they must lie on a bed before buying, despite the assurance of online return guarantees.
- **55.4%** did not do any research and instead chose to go straight to their local mattress retailer, prompted by a good prior experience with both the store and their salesperson. Those consumers indicated that store service and strong guarantees create the confidence they need to buy in-store.

The study found that most consumers did not realize that the online-only mattress brands generally offered limited product choices, and many consumers said they want more than just one or two mattress options.

The study found that only 13% of consumers realized that most beds sold online are vacuum-packed and delivered in a box. It also found that 80.5% of consumers "did not realize that online review sites are often affiliated with and then paid money by the manufacturers, whose products they review," Beemer said.

"The study tells us that traditional mattress retailers and manufacturers need to do more than just elevate the customer experience," Hobson said. "They need to eliminate their customers' concerns and reduce the risk and worry of making a mattress buying mistake. That will help get them back into retail stores to buy.

"By targeting the discomfort so many feel when mattress shopping, ensuring competitive service and satisfaction guarantees, and aggressively marketing 'in store' advantages, consumers will see more reasons to shop and purchase at their preferred retailer again."

In addition, Hobson continued, "only when shopping in store does the opportunity for step up, add on, accessory and referral sales truly present itself."

"This research is perhaps the most exciting of all the studies we have done in the mattress category," added Beemer. "It not only identifies what is impacting retail traffic today, but also provides Colonial with the knowledge needed to help its clients address the most significant and negative trend that many retailers have faced in a generation."