

COMPETITION MAP OF MATTRESS BRANDS IN CHINA

AUGUST. 2020

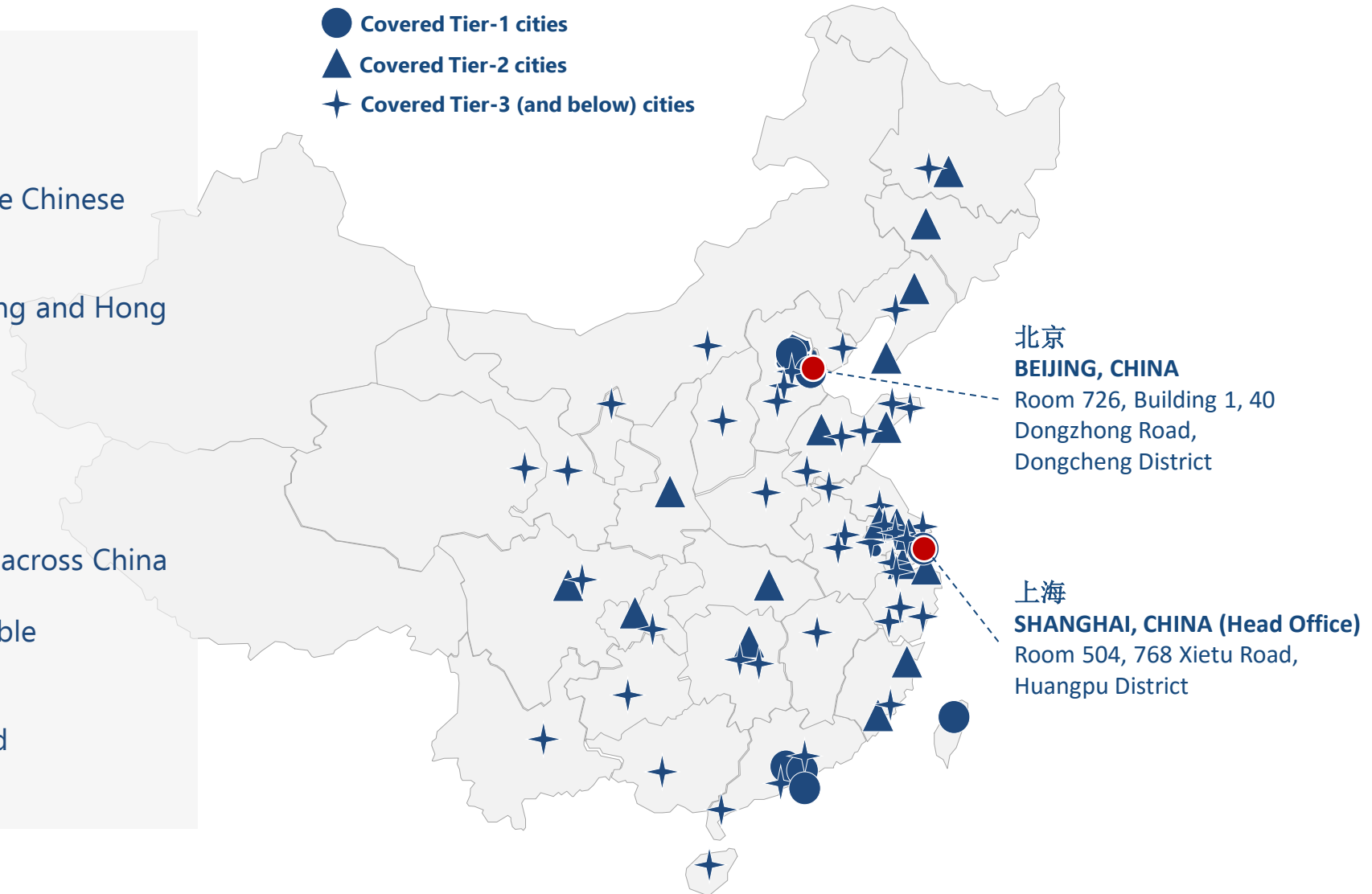
HONG KONG | BEIJING | SHANGHAI
www.daxueconsulting.com

Who we are

Your Market Research Company in China

We are **daxue consulting**:

- A market research firm specializing on the Chinese market since 2010
- With 3 offices in China: in Shanghai, Beijing and Hong Kong
- Employing 40+ full-time consultants
- Full, complete, national coverage
- Efficient and reliable fieldwork execution across China
- Using our expertise to draw precise, reliable recommendations
- With key accounts from around the world



The strengths of Daxue Consulting

6 crucial competitive advantages



1. Localized & Creative 创造和本土

- ✓ Our team has an international background, leveraging the best of both worlds
- ✓ **Teams are tailor-made** depending on the projects
- ✓ **One client = one dedicated team**

3. We manage from A to Z 内部

- ✓ daxue consulting **does not outsource its services**. We manage our own assistants and use directly technological tools.
- ✓ We have a **deep understanding on the fieldwork** and the context within which data was collected.

5. Innovative 创新

- ✓ **Constantly on the look** for new research tools and methodologies
- ✓ Our goal is to **combine traditional methodologies** with the latest **tech tools**

2. Responsive & Flexible 负责和灵活

- ✓ At all levels at daxue consulting, daxue is creating an environment where **freedom and responsibility** go together.
- ✓ **daxue consulting** has a commitment to **answer emails within a day**. We are result-oriented and do not count our time to accomplish our tasks.
- ✓ **Regular reports** with our clients in order to make sure we reach the goal expected from our clients.

4. Actionable recommendations 可行建议

- ✓ We **care about results** and design our research in order to be operational.
- ✓ We are **driven by metrics** such as customer acquisition costs, business plan KPIs, P&L optimization.

6. Professional 专业

- ✓ **Our methodologies are rigorous and serious**, taking information from the best practice in the world of consulting and research.
- ✓ **Demanding on the results, detail-oriented, respectful towards our commitments.**

Our services

Experienced in answering to a wide variety of strategic business questions



MARKET GAP
IDENTIFICATION
市场缺口



MARKET RESEARCH
市场调研



REGULATORY
FRAMEWORK
管理框架



BUSINESS PLAN
商业计划



MARKET POTENTIAL
ASSESSMENT
市场潜力评估



GO-TO-MARKET
STRATEGY
市场进入



MARKET ENTRY
市场准入



CUSTOMER JOURNEY
消费者旅程



COMPETITOR
BENCHMARKING
竞争者对标



MARKET SIZING
市场规模



VALUE PROPOSITION
& USP DEFINITION
价值主张和销售主张



PARTNERSHIP
SCREENING
合作伙伴筛选



PRODUCT TESTING
AND LOCALIZATION
产品测试和本地化



DIGITAL STRATEGY
数字战略



OMNI-CHANNEL
STRATEGY
全渠道策略

350+ clients with 600+ projects for the past 7 years

Examples of references



A recognized expertise on the Chinese market

Regularly featured and quoted in global publications

Daxue latest quotations in recent publications

The New York Times

TECHINASIA

france
bleu

LE TEMPS

SBS NEWS

ASIA WEEKLY

FT FINANCIAL
TIMES

英文中国新闻
The China Post

REUTERS

GLOBAL
TIMES

SBS NEWS

theguardian

y net
news.com

Le Monde

THE WALL STREET JOURNAL

LesEchos.fr

THOUGHTFUL
CHINA

CHINA
ECONOMIC REVIEW

SWI

LE TEMPS

TechNode

CONDÉ NAST

TECHINASIA

FRENCHWEB.FR
la magazine de l'innovation

LE FIGARO

CHINADAILY
中国日报

THE WALL STREET JOURNAL

ESSEC
BUSINESS SCHOOL

The New York Times

Guanghua School of Management
Peking University

Forbes

jns
org | news service

TECH.CO

Voci Globali

JDN
JOURNAL DU NET

L'OBS

Wine News
THE WINE MARKET'S MOST CITED IN 2015

france
bleu

gbtimes
Global Market's Local Source

South China
Morning Post

TECH
INSIDER

IT NEWS AFRICA
AFRICA'S TECHNOLOGY NEWS LEADER

THE JORDAN TIMES

Jing Daily

World
Trademark
Review

FINANCIAL REVIEW

ASIA WEEKLY

Contrepoints
le nivellement par le haut

The Street

Chef
d'Entreprise

CCI FRANCE CHINE
中国法国工商会

ISRAEL HAYOM
THIS IS WHAT AN ARAB

CHANNEL NEWSASIA

algemeiner

華美銀行
EAST WEST BANK

EAST WEST BANK

BOF

Los Angeles Times

StartupBRICS
L'Actu Tech & Startup des Emergents

EL PAÍS



CONTENT OUTLINE

1. The largest mattress market in the world 08
2. Market competition pattern 12
3. How advertisements adapt to Chinese consumers 34
4. Materials and technology behind mattresses 46
5. Key findings 52

1

The largest mattress market in the world

SKYLER

China's mattress market is gradually entering maturity

High-class:

Large international brands

Middle-class:

Domestic well-known brands

Low-class:

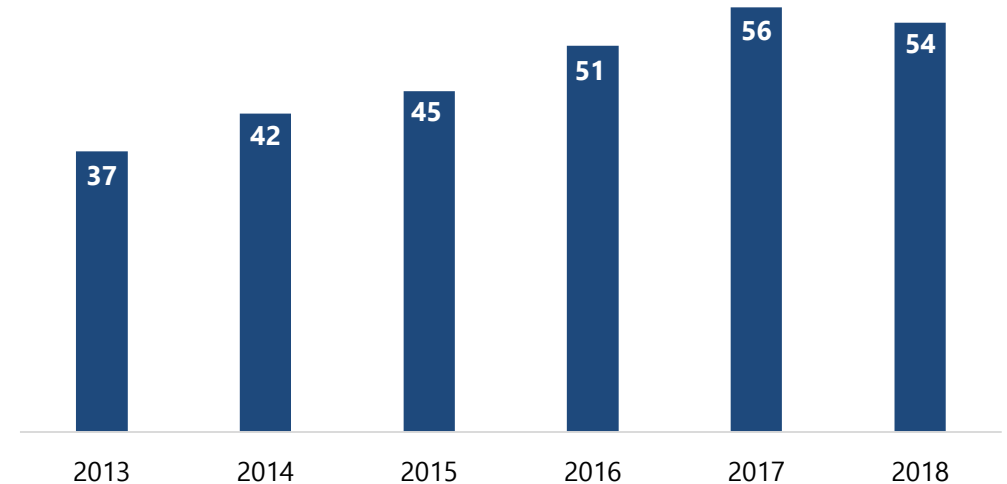
Local brands and general mattress manufacturer

- Chinese consumers generally perceive imported mattresses as premium, hence many foreign mattress brands are pitched to the high end market. Thus, the high-class competitors are represented by big international brands.
- The leading middle-class competitors are mostly domestic brands. The low-class competitors consist of generic brands from local mattress manufacturers.

- Consumption has increased fourteen-fold since 2002, now the mattress market in China is gradually entering maturity.
- With the CAGR of 17.77% over the last decade, China's mattress market surpassed that of the United States in 2015, becoming the largest in the world.

Source: Qianzhan (前瞻产业研究院, a Chinese consulting firm)

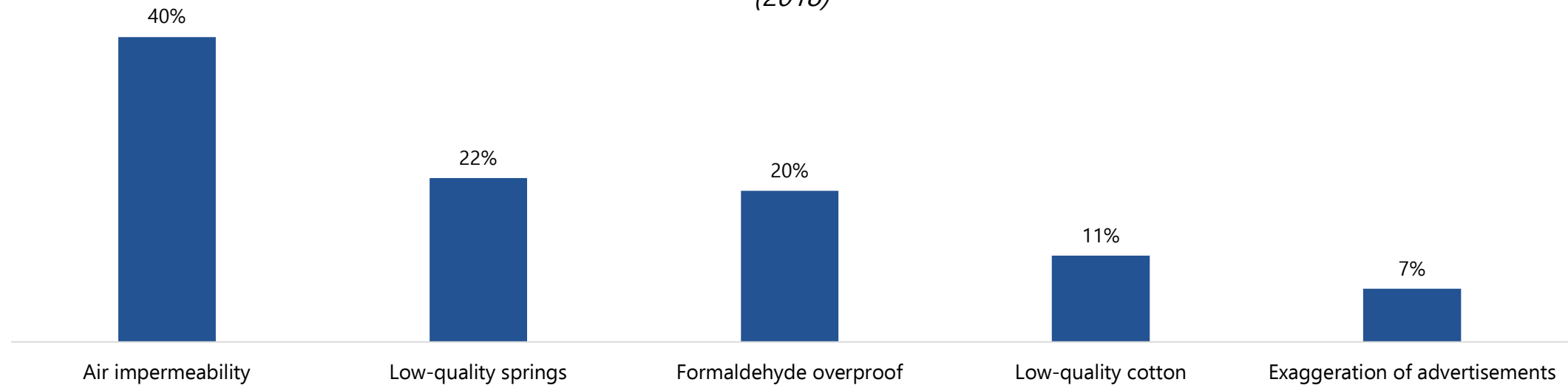
Annual consumption of mattresses in China
(billion RMB)



What do Chinese consumers look for in a mattress (1/2)

- The improvement of living standards has prompted people to have specific requirements for their sleeping environment, mattress quality and appearance. The emergence of mattress production technology can meet the needs of a variety of people.
- When purchasing mattresses, consumers mainly focus on the material and sustainability. In China, sustainability is not only an environmental issue, but there is a perception that it has less pollutants.
- Chinese people typically prefer a hard bed, so they tend to choose hard mattresses, in contrast to western countries which prefer softer.

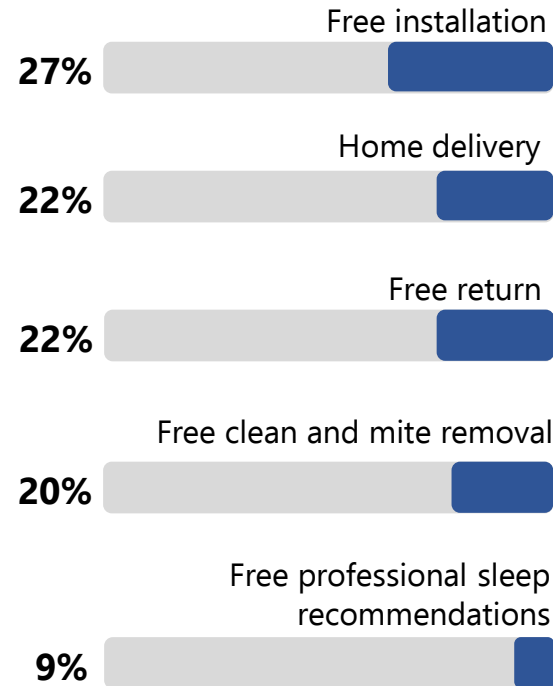
Key factors that prevent consumers from purchasing mattresses
(2018)



Source: WenjunTech (A competitive Big data Marketing company in China)

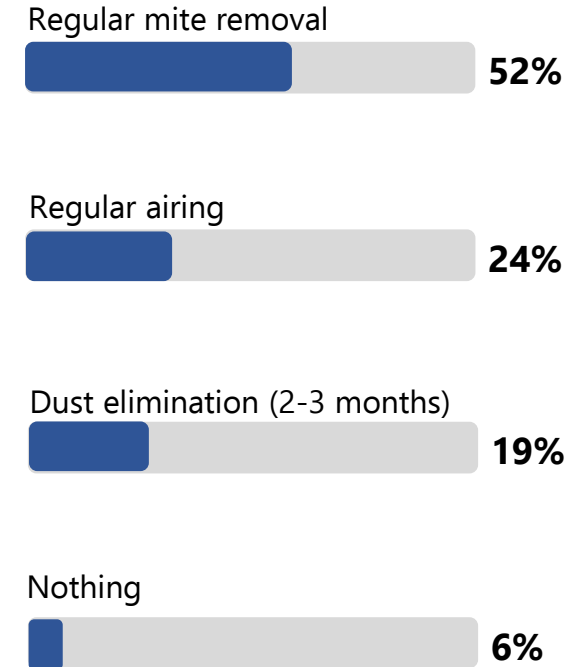
What do Chinese consumers look for in a mattress (2/2)

Consumers' favorite additional services (2018)



Source: WenjunTech (A competitive Big data Marketing company in China)

Consumers' mattress cleaning methods (2018)



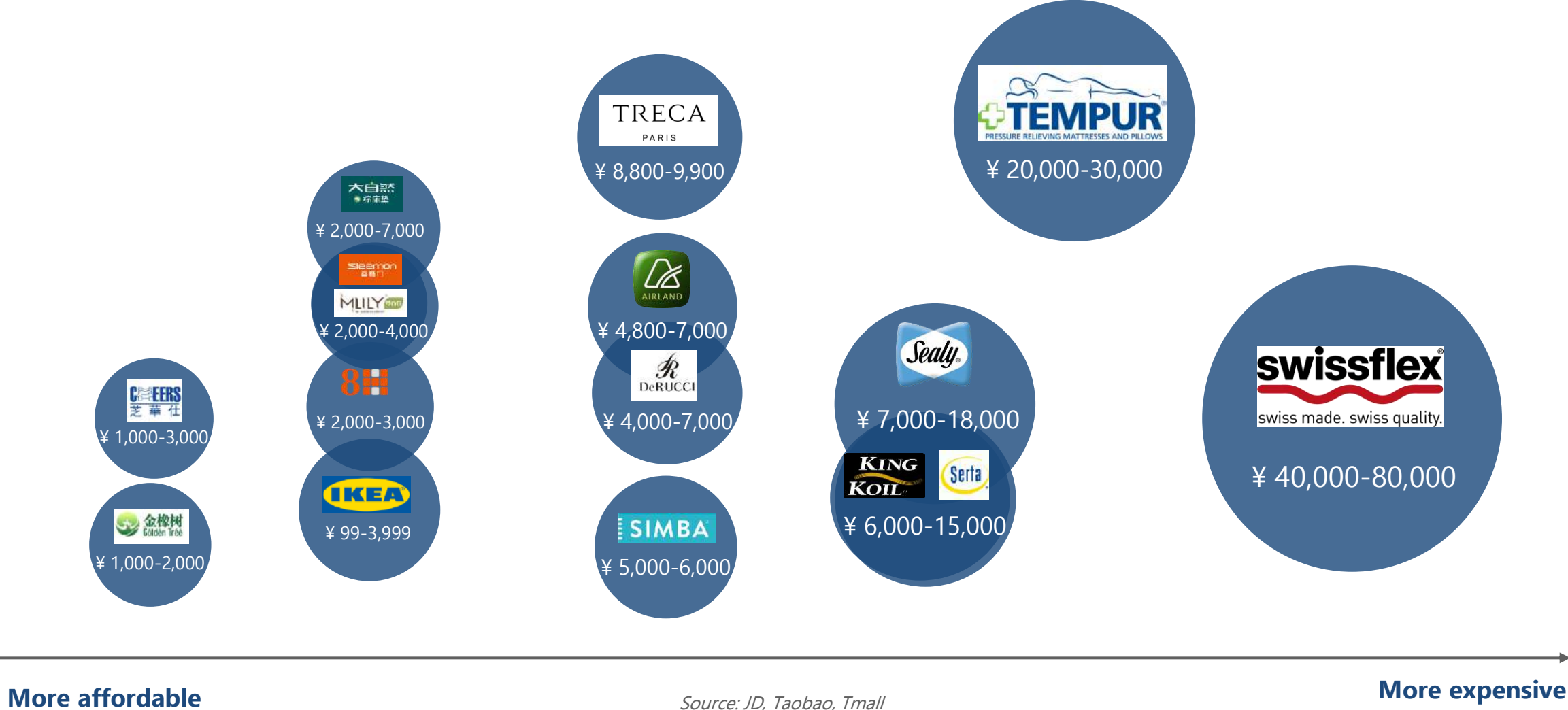
- After sale services are important for many Chinese mattress consumers. These include delivery, installation, returns, cleaning and removing mites.
- Digging deeper, more than half of Chinese consumers value regular mite removal. However, the process is too complicated to do it themselves. Regular cleaning services would be a powerful selling point in China's mattress market.

2

Market competition pattern



Competition mapping by the unit price of mattress

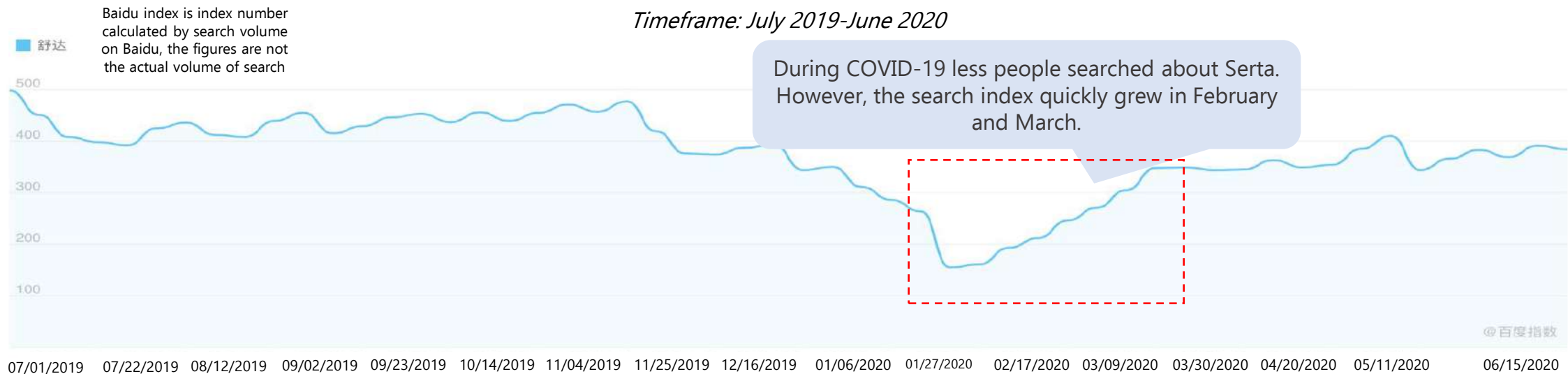


Source: JD, Taobao, Tmall

Serta (舒达): search trends on Baidu

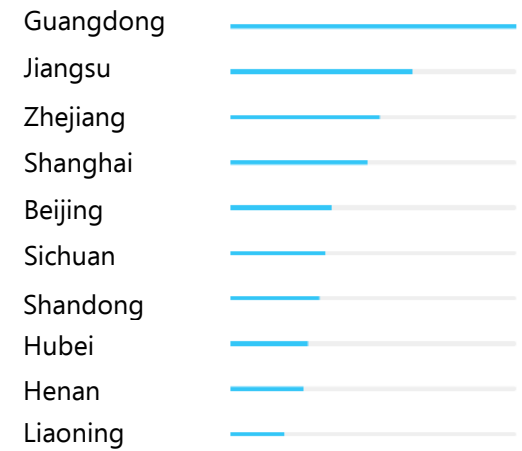
Baidu index: Search trends of Serta (舒达)

Timeframe: July 2019-June 2020



Regional distribution of 'Serta' searches

Time frame: July 2019 – June 2020



Gender split

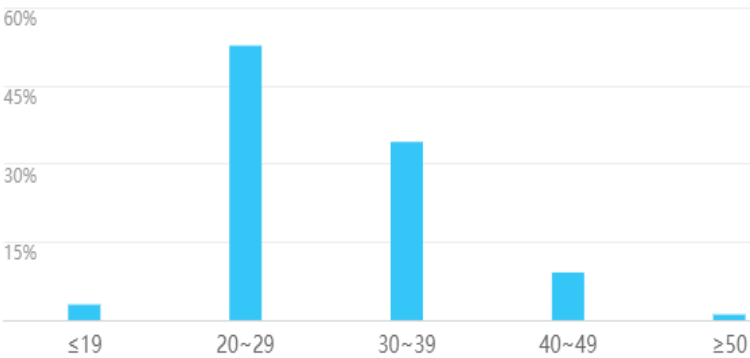


57.54%



42.46%

Age distribution



Source: Baidu index

搜索指数
高 中 低

Serta: Neither too hard nor too soft



“整体来说很不错，上边的花纹很高级，睡上边软硬适中，家里人特别满意

The mattress is overall pretty good. Its pattern looks classy, and the firmness is moderate. We are very satisfied.



“柔软又有足够支撑，睡得很舒服，早上起来不再腰疼，基本上没闻到什么气味

The mattress is soft and can offer enough support to my body. My waist didn't hurt any more when I got up in the morning. There was also basically no odors.

“软硬适中，独立弹簧抗干扰能力强，性价比高。很不错的购物体验

The mattress is moderately firm and its spring has a good performance of anti-jamming. It's worth the price. Overall, it was a nice shopping experience.



Positive comments on Serta's mattress focus on good design, sleeping quality and good value for money.

“针对这个牌子几千大洋买回来的床垫质量真的一般，整体功能中间部分还可以，四周边是真的软塌，收到货之后特意去实体店在看了一下，同样款式相比真不是一个质量

The mattress costs me thousand RMB and its quality is bad. The mattress' surrounding areas are too soft to support me. Once I got the mattress, I visited physical stores and found they have different mattresses for the same brand.



“真的是一点都不舒服，不知道为啥会卖那么贵！开始想的是因为刚睡不习惯，但是睡了一段时间后还是每天腰酸背痛的。

I don't know why the mattress is so expensive, it is so uncomfortable. I was wondering if it's because I wasn't used to sleeping on it. But after I use it for a while, I still have backaches everyday.

“味儿挺大的，得多放几天才能用

It is so stinky that needs to take a few day before using.

Negative comments are mainly about the poor quality such as springs collapsing and odors.



Sealy (丝涟): search trends on Baidu

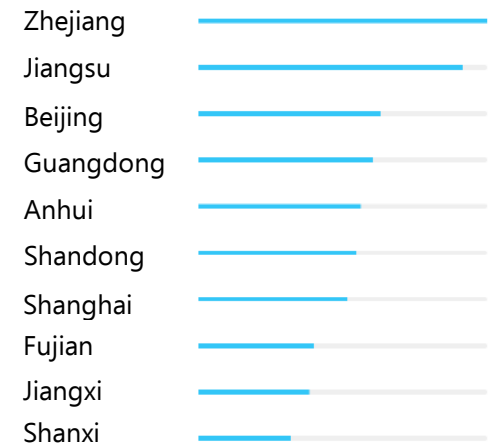
Baidu index: Search trends of Sealy (丝涟)

Timeframe: July 2019-June 2020



Regional distribution of 'Sealy' searches

Time frame: July 2019 – June 2020



Gender split



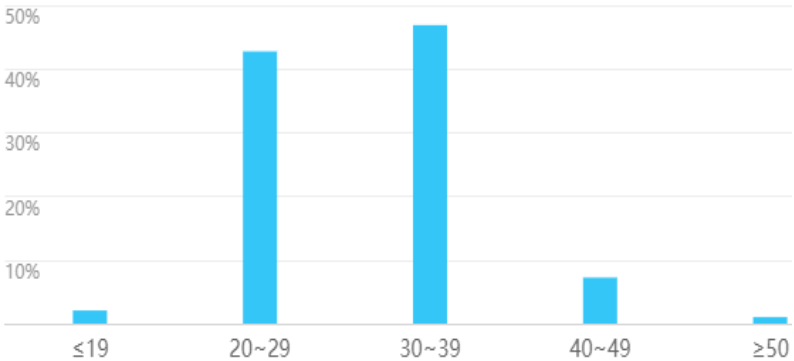
52.76%



47.27%

Source: Baidu index

Age distribution

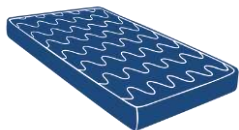
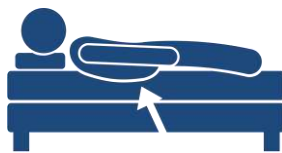


Sealy: Fine workmanship but strong odors



“丝涟不愧是大品牌。做工精细服务到位，床垫软硬适中特别适合老人和小孩睡。

Sealy is a big brand with a fine craftsmanship and considerable service. The moderate firmness of the mattress suitable for the old and young



“床垫的质量非常好，承托性和包裹性都很强，睡起来腰不觉得累，很舒服。做工也非常精致。

The mattress has good quality, good support. The mattress was so comfortable that my waist feels so good when I am sleeping.

“还不错，丝涟内部没有胶水粘连，比较环保

Not bad, there was no glue inside the mattress, which is environment friendly



Chinese consumers like the design, craftsmanship, service and high quality of Sealy. They also appreciate that the mattresses are eco-friendly.



“不敢相信是国际大品牌的产品，质感很low，侧面可以摸到弹簧。味道非常大。对丝涟比较失望。

I cannot believe the mattress is from an international brand. The texture is terrible, and you even can touch its springs from the side. The smell is so strong! I feel disappointed with Sealy.



“等了一个月的床垫，感觉不是太理想，味道重

Waited for one month to receive it, it was disappointing since the mattress had a strong smell.

“很差，床垫弹簧睡了一晚塌陷了，品质不过关，摸起来很粗糙，连弹簧都塌陷了。有一股工业药水味道。

It was terrible, mattress springs have collapsed after a night. The mattress has a poor quality and rough texture. It smells like industrial liquids.

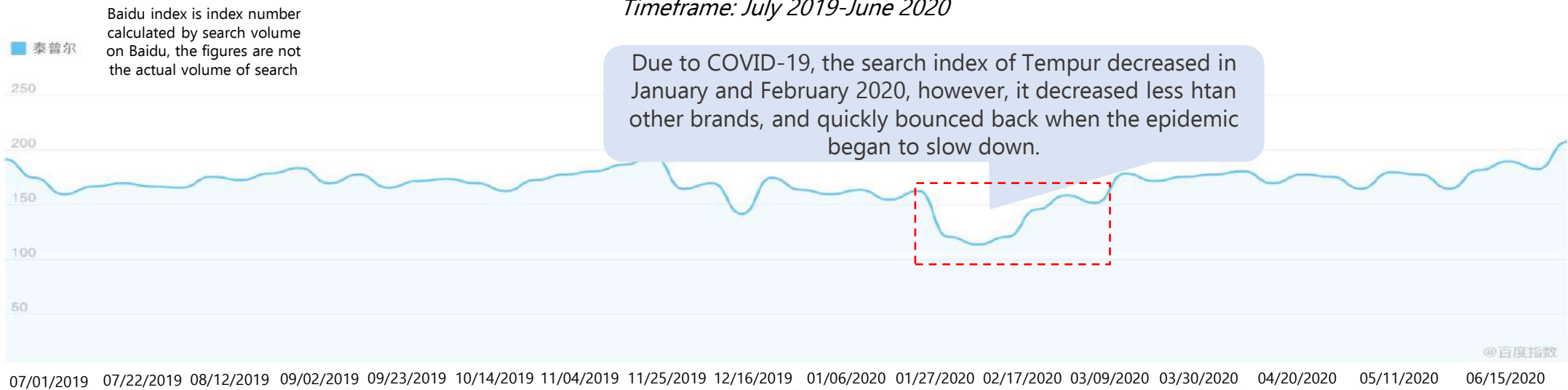
Negative comments about Sealy mattresses mainly focus on strong odors and springs collapsed.



Tempur (泰普尔): search trends on Baidu

Baidu index: Search trends of Tempur (泰普尔)

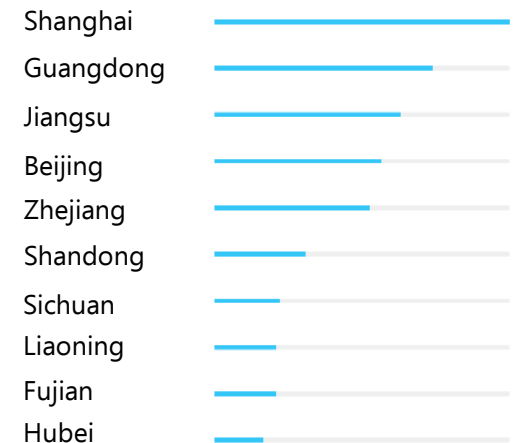
Timeframe: July 2019-June 2020



Regional distribution of 'Tempur' searches



Time frame: July 2019 – June 2020



Gender split



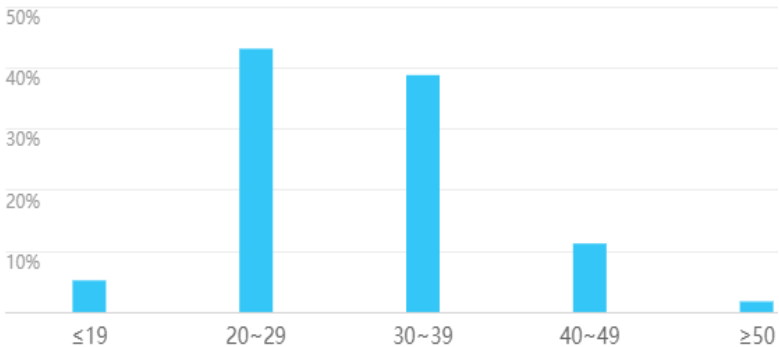
62.93%



37.07%

Source: Baidu index

Age distribution



Tempur: Focusing on comfort



床垫特别白，特别软，而且晚上睡觉的时候特别暖和

The mattress is particularly white, soft and warm at night



打开第一晚还不适应，第二晚睡的就很舒服，太空棉的舒适度很棒，慢弹感觉之后每晚都很舒服。

It wasn't suitable for the first night, then it became very comfortable to sleep from the second night. The space cotton is very comfortable.

床垫软硬适中，睡上去和身体贴合的很棒，宝宝睡上面，我怎么动，都不会打扰他睡觉了

The mattress is moderately soft. It fits well with my body. No matter how I move on the bed, I won't disturb my baby who sleeps beside me.



Consumers are satisfied with the comfort of Tempur's mattresses and are impressed at how little the mattress moves when turning over.

味道很大，睡了两晚，头痛。从压缩袋取出床垫，发现一侧是明显发黄的。贪图便宜果然没好质量啊

The mattress is stinky. I slept on it for two nights and it made me have a headache. When I took out the mattress from the compression bag, one side of the mattress has yellowed. I wanted a cheap mattress and unfortunately I got what I paid for.

床垫到了还没有试，体验非常差的一点是，物流告诉我他们只收了80块钱，不能帮我搬运，我是电梯楼都不能帮忙搬，我自己搬上去的，体验非常差非常差

The mattress hasn't been tried yet. The logistics company told me that they only charged 80 yuan and couldn't deliver it to my room. I had to do it by myself and it was a very bad experience.

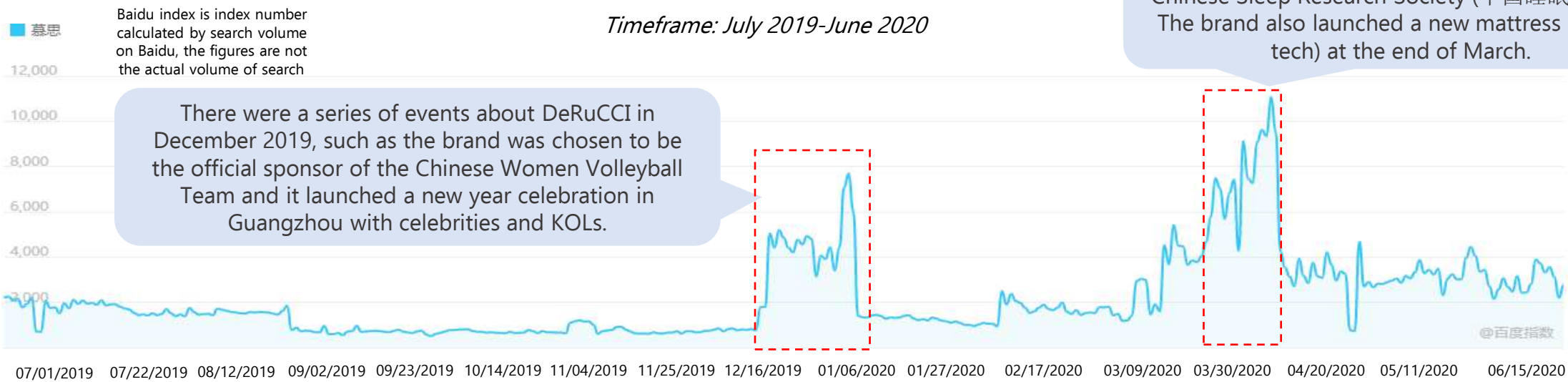


Consumers' negative comments on Tempur mattresses are mainly the weird odors, cleanliness and bad delivery service.

DeRuCCI (慕思): search trends on Baidu

Baidu index: DeRuCCI (慕思)

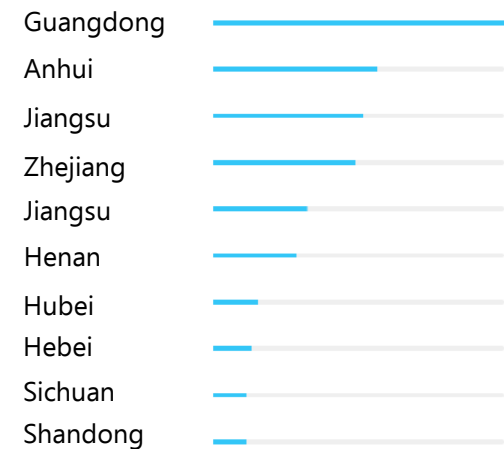
Timeframe: July 2019-June 2020



Regional distribution of 'DeRuCCI' searches



Time frame: July 2019 – June 2020



Gender split



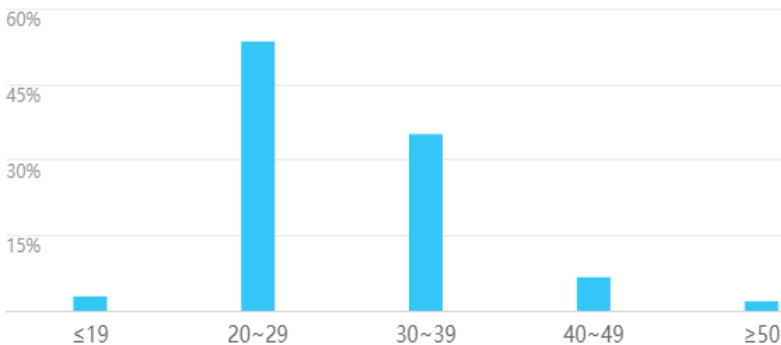
55.42%



44.58%

Source: Baidu index

Age distribution



DeRuCCI: High recognition among Chinese consumers



“前前后后也买过好几个慕斯的床垫和床了，对慕斯产品的质量还是很有信心的，最长的产品用了快10年了，依然跟刚买回来时差不多。感觉这款床垫整体高大上，没有气味，也没有闷热的感觉，整体感觉很棒。

I am a DerRUCCI's loyal customer and feel confident about DerRUCCI's quality. The longest product has been used for nearly 10 years, which is still the same as when I just bought it. I feel the mattress looks classy and there is no odor or the feeling of mustiness.

“很精致的席梦思床垫。上面面料柔软很好，弹簧支托也很有力量，对中老年来讲很适合，单边翻动对另一边影响较小。很好的床垫

It's a very delicate mattress with soft texture and supportive springs which are suitable for old people. When I turned over on one side, it has little effect on the other side.

“认准慕思家床垫，双层独立弹簧，睡觉相互不影响。舒适，没有味道

Believe the mattresses of DerRUCCI! They have double independent springs and 2 people won't affect each other when they sleep. It is comfortable without any odor.



Consumers' recognition of DeRUCCI is very high, and most of them are regular customers. They think that DeRUCCI mattresses are clean and odorless



“越睡越腰疼，咨询客服得不到有效回答，很伤心。很怀疑这到底是不是真的.....要么就处理掉换一个床垫，脊柱要紧。

I had a backache after sleeping on DerRUCCI's mattress, and customer service could not help me. I feel very bad. For my spine, I decide to switch mattresses.

“每天都睡得腰酸背疼，太差劲，像掉到坑里。和实体店压根没办法比较，对不起这个品牌，

I sleep with a backache every day. The mattress sucks, I feel like falling into a pit when I sleep on it. It's inferior to physical stores' quality.



“太软睡得腰疼，大件退货不容易，勉强收下。

The mattress is too soft which makes my waist hurt. It's not convenient to refund.

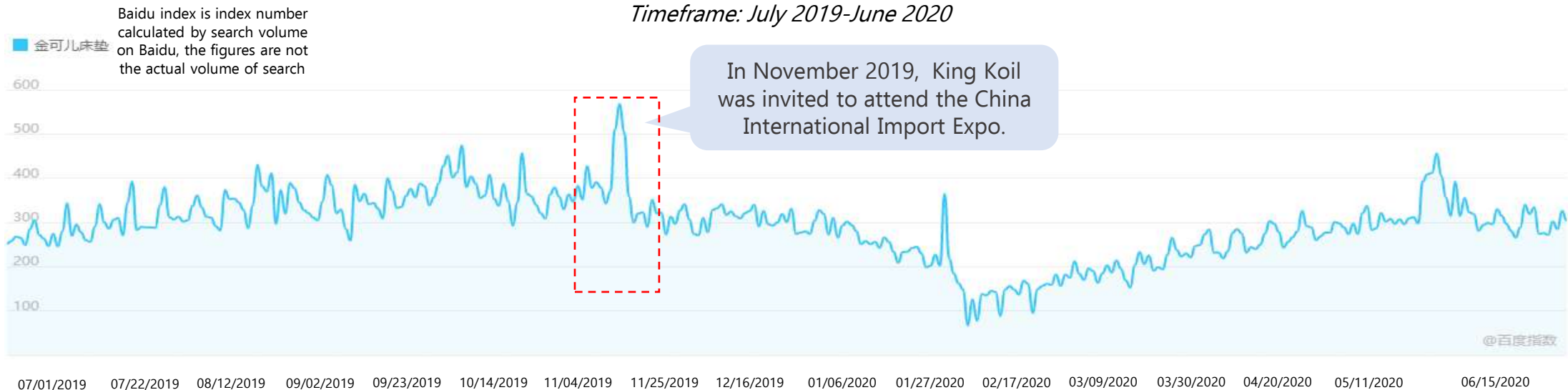
Consumers are mainly dissatisfied DeRUCCI with the softness of its mattress. They think it's too soft and gives them backaches.



King Koil (金可儿): search trends on Baidu

Baidu index: King Koil (金可儿)

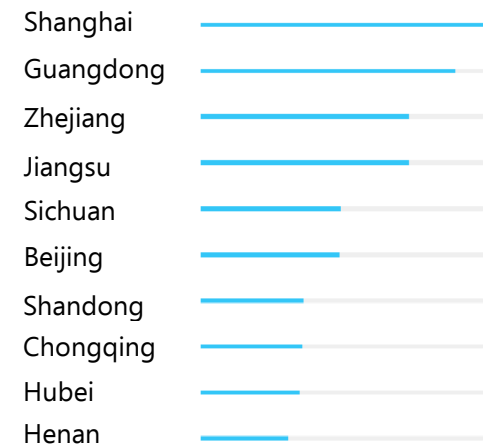
Timeframe: July 2019-June 2020



Regional distribution of 'King Koil' searches



Time frame: July 2019 – June 2020



Gender split



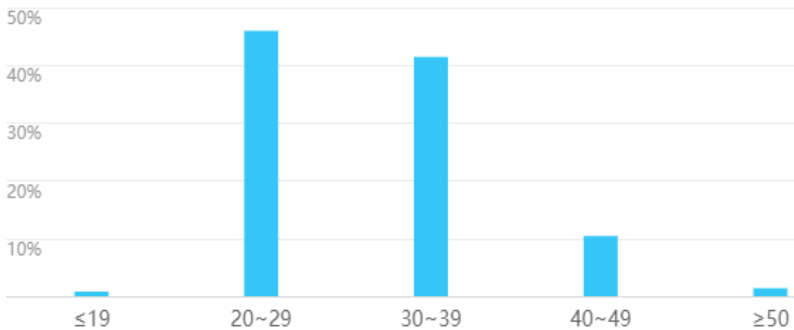
56.86%



43.14%

Source: Baidu index

Age distribution



King Koil: Spine protection won the favor of consumers



“床垫看似很软，睡在上面很硬实，很舒服，同床人翻身也互不影响，非常好！
The mattress seems very soft, I feel comfortable to sleep on it. It won't affect people on the other side when I turn over, it's wonderful!

“床垫果然名不虚传啊，说硬但是躺上去软软的，说软又感觉的到下面硬实的床面，反正特别棒，希望能用的长久
King Koil is equal to its reputation. The mattress looks hard, however, it is actual soft when I lie on it. It's great and I hope it is durable.

“床垫是护脊床垫，相对比较硬，给家里的老人睡正合适
It's a spinal care mattress which is relatively hard, it's suitable for elderly to use at home.



King Koil mattresses' positive comments mainly said that its combination of soft and hard surfaces can protect the spine.



“回来住了半个月才发现不好睡，床和销售员描述的不一样 太软 正反面全都睡过了 每天起来腰酸背痛的。这个床垫千万不要买 得了病下半辈子就废了 奉劝各位 购买前慎重。
I have used the mattress for half a month and I feel uncomfortable. The mattress is not the same as the salesman's description. Every time I wake up in the morning, my back feels sore. Please be careful before you buy it.



“属于偏软的 对腰椎的支撑还是不够 第2天起来腰部会有点沉甸甸的
The mattress is too soft to support my lumbar vertebra, and my waist is a little uncomfortable in the morning.

“味道还挺大的！这一点不如舒达 新的买来几乎没啥味道！
The mattress is so stinky. It is inferior than Serta which does not have any odor.

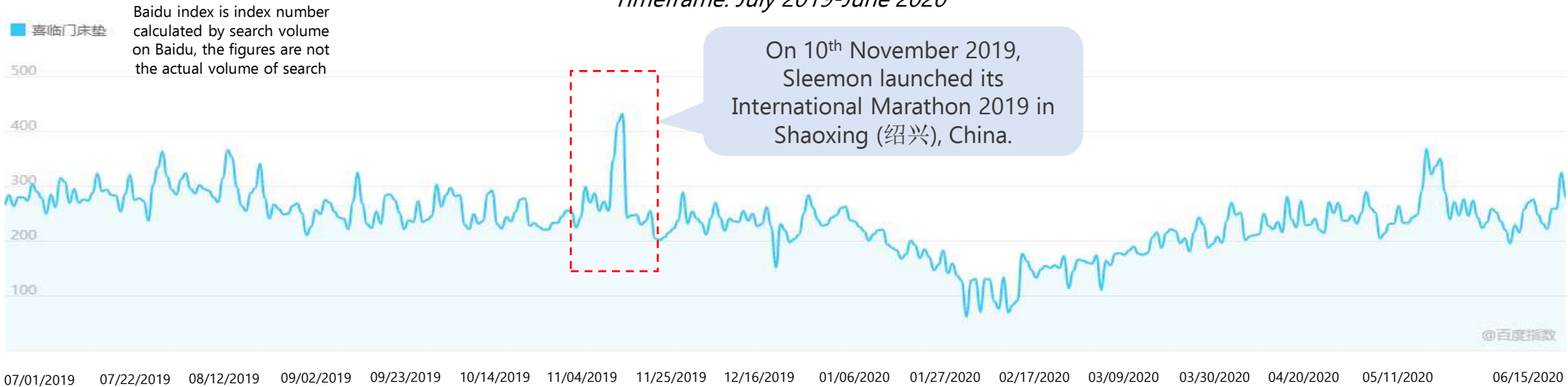
King Koil mattresses' negative comments are about being too soft and a bad odor.



Sleemon (喜临门): search trends on Baidu

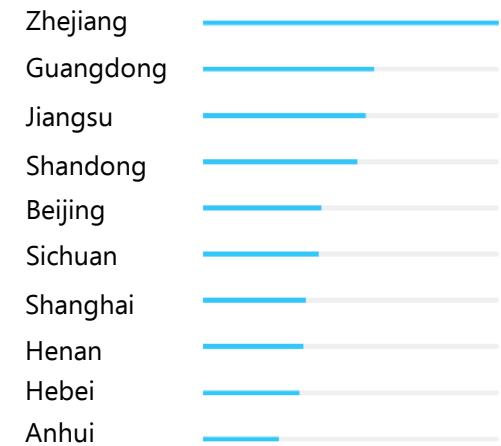
Baidu index: Search trends of Sleemon (喜临门)

Timeframe: July 2019-June 2020



Regional distribution of 'Sleemon' searches

Time frame: July 2019 – June 2020



Gender split

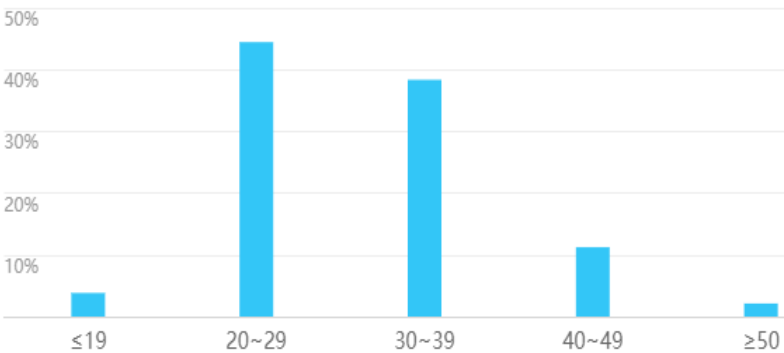


45.7%



54.3%

Age distribution



Source: Baidu index



Sleemon: Caters to Chinese preference for a hard bed



床垫刚收到时有点气味，放了一个星期就没有了，买床垫就要买品牌的，便宜的不敢要，我家宝宝还小，品牌的放心，床垫躺着很舒服，很满意。

The mattress was a little stinky when it arrived, however the odor is gone after a week. It is comfortable. I prefer big brand that is safe to use, since my baby is young.

很舒服。软硬适中。感觉是硬板床上垫了厚厚的垫子，既能感觉到床板的硬，又能感觉到躺上去的舒服舒适，没有了之前弹簧床垫的弹性和腰部不受力的感觉。

The mattress is comfortable with moderate firmness. I feel like there is a thick cushion on a hard board, which can not only feel the hardness of the bed board, but also feel the comfort of lying on it. It is supportive.

整体簧床垫比独立袋装簧垫子要硬一些，正是自己想要的效果。不错，值得信赖。

The whole spring mattress is harder than the independent spring mattress. This is exactly what I want! The brand is trustworthy.

Consumers trust the quality of Sleemon mattresses, and they are satisfied with spring mattresses.

和乳胶不知道沾不沾边，坐在上面，和布艺沙发是一样的感觉，感觉和一大块海绵一样

I feel like it is a huge sponge, sitting on the mattress is like sitting on the cloth sofa. I was wondering if it is real latex.

床垫的味道很刺鼻，特别浓烈，放房间里面，下班回家连客厅都满满的异味

The smell of the mattress is very pungent. Even the living room is smelly when I back home.

只管卖不管售后，一品牌商，床是坏的，床垫变了形

The mattress was deformed, but customer services did not give me any response

Consumers' negative reviews of Sleemon mattresses focused on after-sales service and pungent smell.

MLILY (梦百合): search trends on Baidu

Baidu index: Search trends of MLILY (梦百合)

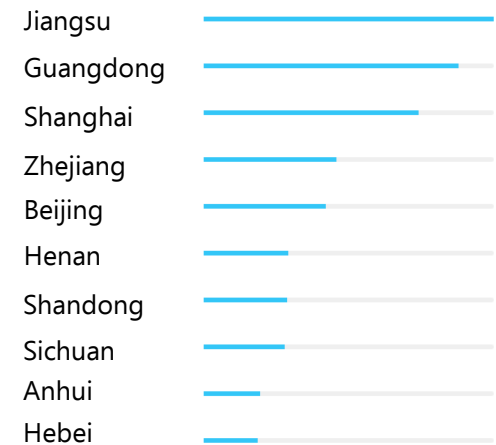
Timeframe: July 2019-June 2020



Regional distribution of 'MLILY' searches



Time frame: July 2019 – June 2020



Gender split



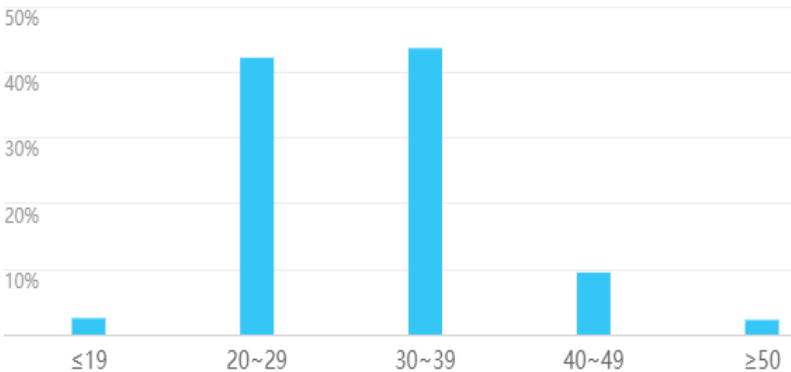
65.89%



34.11%

Source: Baidu index

Age distribution



MLILY: Good elasticity and strong support



“虽然薄薄的，但是非常软，躺上去超级超级舒服，之前没睡梦百合床垫的时候睡眠质量比较差，半夜总是醒，睡了梦百合以后真的是差别超大。腰部的贴合度很高，睡觉一点也不会觉得累。

The mattress is thin, but it's very soft. It's super comfortable to lie down. I haven't woken up in the middle of the night since I slept on this mattress. I don't feel tired at all after I sleep on it.

“睡起来很软，但是不会觉得没有支撑力，所以睡觉起来也不会浑身酸痛，在家躺着也很有酒店那种很爽的感觉

The mattress is very soft and it doesn't feel unsupportive. Thus, I don't feel sore when I sleep. I feel like sleeping at a hotel.

弹性真的好。而且睡起来支撑力很足，我喜欢睡硬床垫，一直觉得软垫子不解乏，但是这个床垫我睡了三天后觉得真的没有不解乏的状态，而且睡起来人真的很轻松。

The mattress is elastic and supportive. I like sleeping on hard mattresses, since I always feel that soft mattresses are not able to recover from fatigue. MLILY mattress makes me relaxed after sleeping.

MLILY mattress's praise is mainly due to its relatively strong support, firmness and good fit on the waist.



“手感一摸有些失落，感觉就是海绵而已，没有那种记忆棉的慢回弹的感觉

I felt disappointed when I touch the mattress, it's just sponge. There is no the feeling of memory cotton.

“解压缩后感觉外套跟里面的海绵配合不太好，有点铺不平

After decompressing, I feel that the bed cover doesn't fit well with the sponge mattress inside. It's a bit uneven



“实际产品跟宣传上的完全不同，没有一点慢回弹的效果。感觉跟普通海绵无异。

The actual product is totally different from the advertising without any slow rebound effect. It feels like an ordinary sponge.

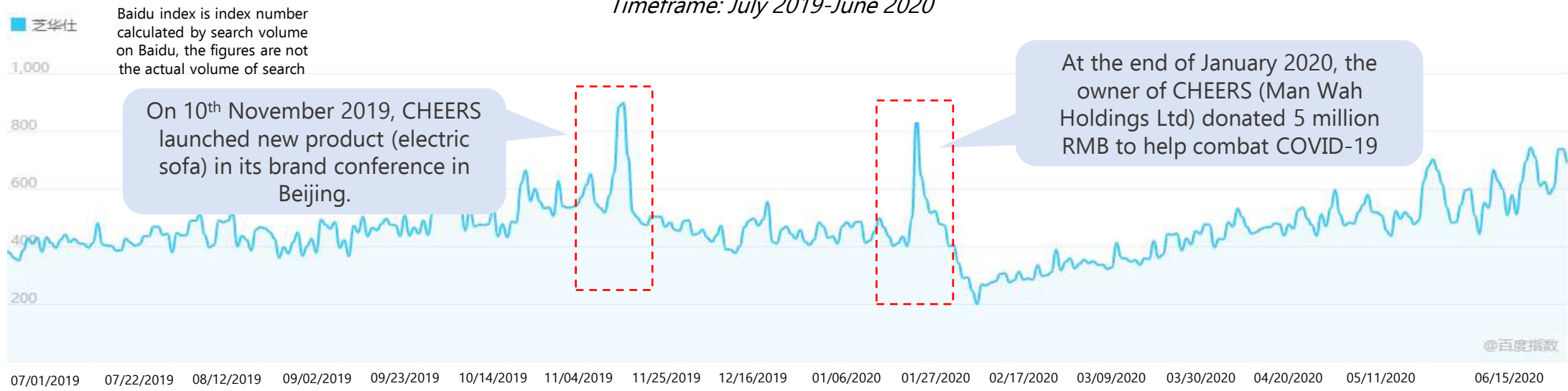
Consumers who are dissatisfied with MLILY mattresses mainly question whether the materials are really memory foam.



CHEERS (芝华仕): search trends on Baidu

Baidu index: Search trends of CHEERS (芝华仕)

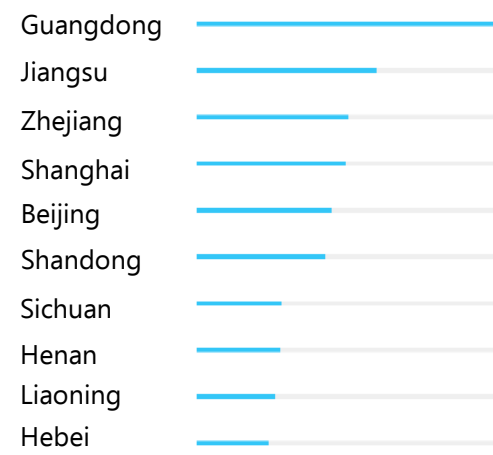
Timeframe: July 2019-June 2020



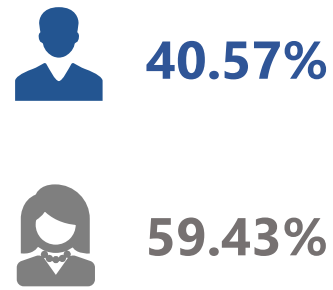
Regional distribution of 'CHEERS' searches



Time frame: July 2019 – June 2020

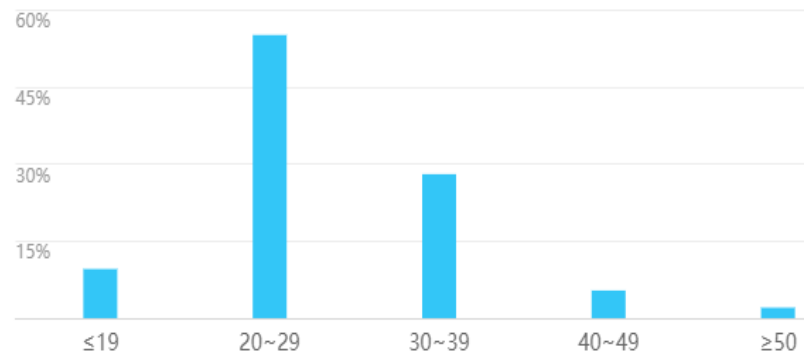


Gender split



Source: Baidu index

Age distribution



CHEERS: Good value for money but strong smells



“这款床垫躺上去很舒服，质量超好，芝华仕大品牌值得相信，以后还会回购哒

This mattress is very comfortable to lie on. Its quality is excellent. I believe big brands and will have buy its mattress again in the future.

“垫子比较厚，弹性还不错，震动效果蛮好的！

The mattress was thick and elastic. The mattress has plenty of bounce!



“床垫真的很舒服很柔软有支撑性，性价比超高

The mattress is comfortable, supportive and it is worth the price.

Consumers believe that CHEERS is trustworthy and the mattress comfort is relatively good for the price.



“味道非常大，买了好多活性炭，买了台大电扇24小时吹，半个月了还是一样

The mattress is stinky, so I bought a lot of activated carbon and a large electric fan to blow it for 24 hours. But it's still the same after half a month.

“一起在芝华士买了几万的东西，后悔的不得了。有些地方的皮还是坏的，东西一般般，态度也不好

I spent tens of thousands RMB on Cheers, and I regret it. The mattress is damaged. It is not as good as I expected, and sales people's attitudes are terrible.

“因为家里有甲醛过敏的人，收到后就先用家里的仪器测试甲醛，是国标的三倍

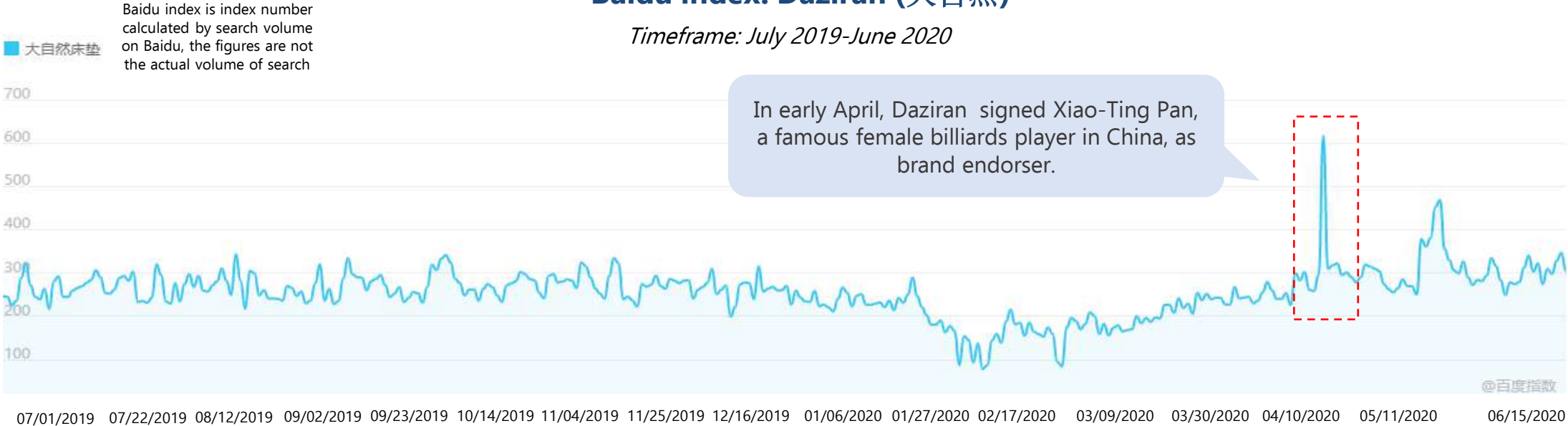
Because my family members are allergic to formaldehyde, so I tested formaldehyde at first. To my surprise, it is three times the national standard.

Consumers' negative comments about CHEERS mattress mainly focus on strong smell and excessive formaldehyde.

Daziran (大自然): search trends on Baidu

Baidu index: Daziran (大自然)

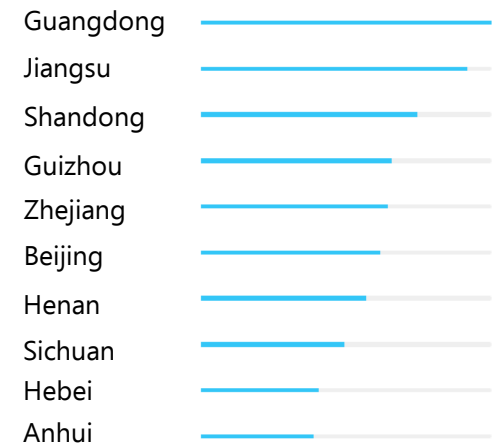
Timeframe: July 2019-June 2020



Regional distribution of 'Daziran' searches



Time frame: July 2019 – June 2020



Gender split



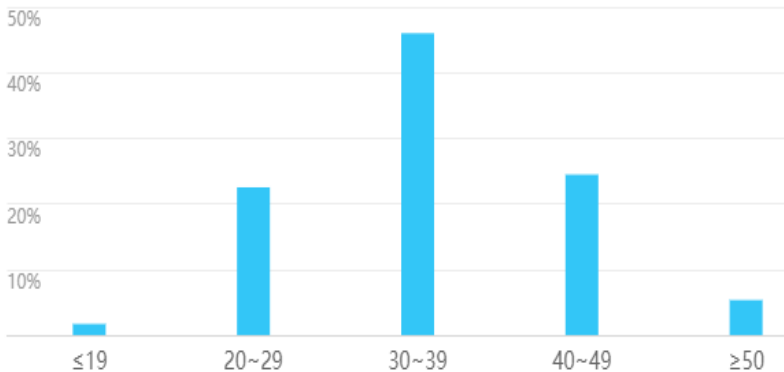
48.43%



51.57%

Source: Baidu index

Age distribution



Daziran: Eco-friendly materials and good workmanship



“床单实质是偏硬的，表层的床垫套很舒服，不会令人硬的不舒服，很适合自己。腰部和颈椎不舒服，特意买偏硬的棕垫，睡起来症状有改善。

The cover of the mattress is comfortable. My waist and cervical vertebra are not comfortable, so I bought coir mat specially. My sleep quality has been noticeably improved.

“非常满意的，做工细，质量好，用材料讲究

The mattress has good workmanship, good quality and exquisite materials. Love it!

“床垫睡起来很舒服，有乳胶的清香，做工很细致，还有拉链可以打开看棕垫，是全棕垫，满意

The mattress is very comfortable to sleep on. It has the fragrance of latex. The workmanship is very meticulous. It's a coir mattress. I am satisfied.



Positive comments on Daziran's mattress focus on its unique craftsmanship and good quality of hard palm mattresses.



“打过来床垫外套多处脱线，放了很久味道依然非常大，拉开散味，拉链竟然又出问题了，这质量真不怎么样！

The mattress cover is off-line at many places, and it smells bad. When it's opened, the zipper was broken. The quality is not good!

“有味，收到货就都拆开放味了，家里有孩子，不放心又买测试剂测试，结果还是甲醛超标。

The mattress is smelly. I have a child, so I tested formaldehyde concentration. The result showed that formaldehyde exceeded the standard.

“味道非常大，现在经过几个月了，如果房门是关的，经过几个小时后再开门，味道扑面而来。

The smell of the mattress is very strong. If the bedroom's door is closed after a while, when I open it, the odor will blow on my face.

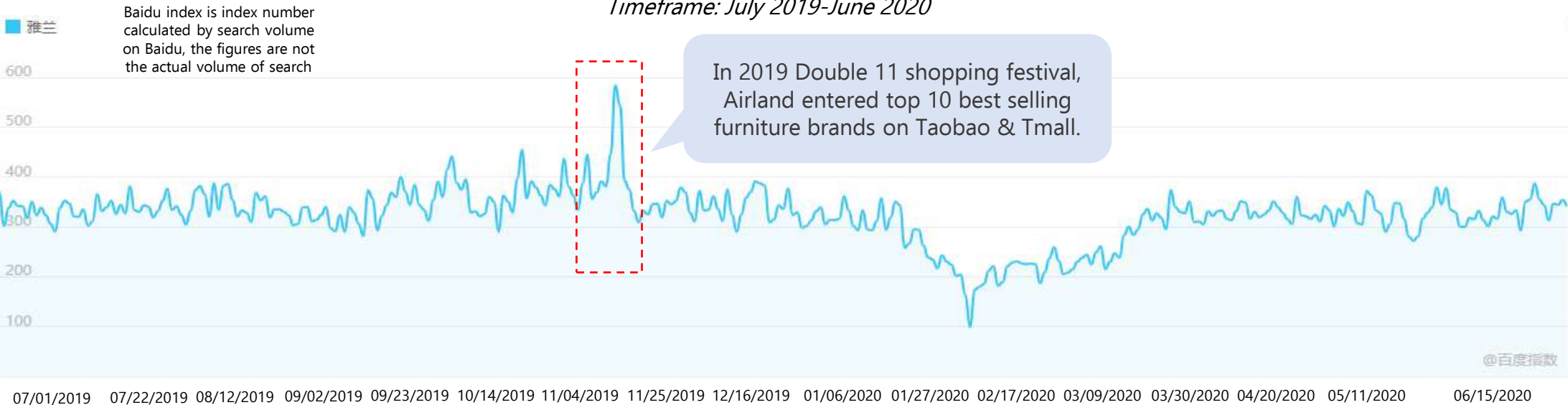


Negative comments on Daziran's mattress are mainly about its low quality, strong smells and excessive formaldehyde

Airland (雅兰): search trends on Baidu

Baidu index: Airland (雅兰)

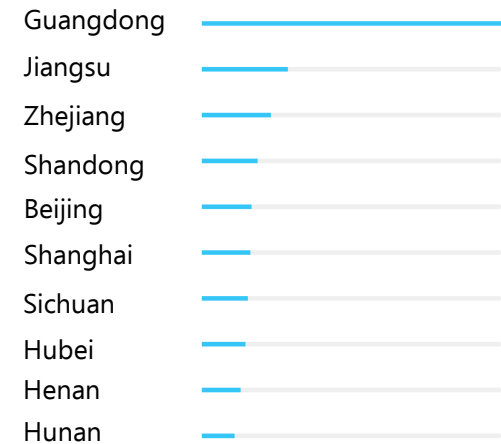
Timeframe: July 2019-June 2020



Regional distribution of 'Airland' searches



Time frame: July 2019 – June 2020



Gender split



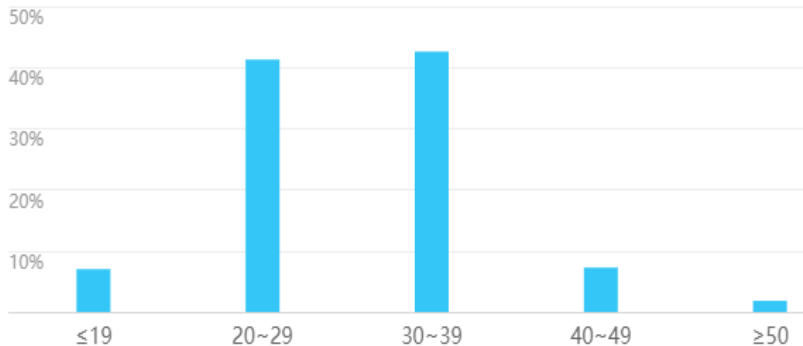
55.18%



44.82%

Source: Baidu index

Age distribution



Airland: No smells and no noise, but easy to deform



床垫挺好的，原本害怕会有味道实际上没什么异味这点让人很满意

The mattress is very good. I was afraid that it would smell bad.
Actually, it has no smell. This is very satisfying

感觉很好，尤其双人床如有一人翻身不受影响，没有声音，不象以前的那个床垫翻身有声音，睡觉蛮舒服的，而且新床垫还没有气味。这是我想象中的效果

I feel very good. Especially if one person on the bed turns over, there is no noise. It's quite comfortable to sleep on, and the mattress has no smell.
This is what I expected.

睡软那面，刚刚好，舒服没有异味。

Sleep on the soft side of the mattress is good for me. It's comfortable and has no smell.



Positive comments say the mattress has zero smells, zero noise, and is very comfortable.



床垫质量超级差，睡一个晚上就变形 而且变形的非常可怕！睡在中间两边就翘起来，睡在左边，右边就翘起来，从来没有见过这么差点床垫！

The quality of mattress is extremely poor. It was deformed after one night's sleep! When I sleep in the middle of the mattress, two sides rose.

弹簧偏软，边上一坐咯吱响，正面，面料不错，背面有色差，对于大件退货，非常麻烦

The spring is very soft, and the mattress creaks when sitting on it. Good fabrics on the front, but color difference on the back. It is so complex to return such a huge mattress.

质量非常差，还没有用就大面积塌陷了，找找售后维修还需要自费花几百块邮费寄给他，不然不会管

Poor quality, the mattress collapsed in a large area before I used it. I had to pay hundreds of RMB to after-sales service for repairing.



Negative comments focus on the mattress being misshaped and poor service quality.

3

How advertisements adapt to Chinese consumers



Serta: Resonating with consumers by “counting sheep”



Key messages



How to deliver messages

- “So comfortable, you will never count sheep to fall asleep again.”



By using cartoon sheep and a tagline to present in the video.

- Serta’s mattress is popular globally



Taglines on posters saying Serta’s sales are leading globally.

- Serta’s mattress is good value for money



The comparison made with five star hotels, which indicates consumers can enjoy a high-end mattress at an affordable price.



TV commercials



Content & Differentiation

- Serta filmed different cartoon commercials to show how sheep are out of work after people buy Serta’s mattresses. Implying Serta is so comfortable, people fall asleep quickly and there is no need to ‘count sheep’.
- Serta applied counting sheep in its Chinese advertisements as they did in the USA, but Chinese people don’t have the habit of counting sheep. It means the brand conveyed the same message by the Chinese language instead of localizing the message to China’s market.



Target audience



Serta targets consumers who have difficulty in falling asleep due to uncomfortableness of mattress.



Poster



Poster

Sealy: Building high-end image by showing high tech and standard



Key messages



How to deliver messages

- **"Support your back appropriately."**



Shows a diagram of how Sealy's mattress could sense the weight of the human body and effectively support the spine in the most comfortable position during sleep.

- **"Five-star hotels' mattress standard"**



Using taglines and a luxury sense in pictures to show that Sealy provides mattress for five-star hotels



Content & Differentiation

- Sealy wants to tell consumers that Sealy's mattresses apply "Posturepedic Technology" which can provide supports to where people need it most.
- Sealy build a high-end image by telling audience that their products are used in five star hotels in taglines.



Target audience



Sealy targets people who have sleep problems due to less supportive of mattresses



Airland: Focusing on long history and natural materials



Key messages

- **"Pursing good quality of life" by using Airland's mattress.**



Highlighting the long history brand with well-known reputation of quality in taglines.

- **Advocating the balance between life and nature.**



Applying plants and light color associating with nature in background.



How to deliver messages



Content & Differentiation

- Airland is a brand from Hongkong where people pay more attention to sincerity and reputation of brands. Thus, Airland's advertising repeats words like "quality" and emphasizes the long history of the brand.
- Airland continues to conducting company's value, "eternal harmony with nature". That is why all the advertisements are around nature.



Target audience



Airland attracts consumers, especially elder consumers, who prefer old brands, since they may feel like old brands provide better qualities and credibility.



TV Commercials



Poster



Poster

Tempur: Leveraging NASA to build a reliable and professional image



Key messages

Tempur is certified by NASA (The National Aeronautics and Space Administration) for applying pressure absorbing materials



How to deliver messages

Introducing its high-tech materials and features in taglines

Tempur claims that NASA applies their products for astronauts.



Content & Differentiation

- People believe that NASA must use the best products for astronauts. Thus, claiming Tempur's continued research on NASA's inventions which took nearly ten years and millions of US dollars to apply space technology into Tempur's materials, Sealy's quality was guaranteed indirectly.
- Since NASA's authority is beyond doubt, Tempur utilizes NASA's well-known reputation to differentiate from the market



Target audience



Tempur targets consumers who want to improve sleep quality by sleeping on mattresses that can perfectly fit their body



Poster



Poster



Poster

Sleemon: Highlighting its leading position in the mattress market



Key messages

- **Sleemon is the industry leader supported by the Chinese government.**
- **Sleemon is able to perfectly fit body**
- **Mattress is fit for a family**



How to deliver messages

'CCTV National brand plan' tagline

Ads show diagrams of how the mattress distributes body weight

Shows family moments, such as couples sleep together, and parents play with children on beds



Content & Differentiation

- Sleemon's posters say they are leading brands in the category and supported by the Chinese government. It indirectly tells people Sleemon's quality is guaranteed.
- Sleemon is family-oriented as well, it thinks that a mattress holds different feelings, such as love with mates and joy with children. These feelings formed a completed family. By creating an illusion of a harmonious family life in TV commercials, Sleemon builds an amiable home brand image in public.



Target audience



Sleemon targets consumers who want to buy a reputational and quality-guaranteed mattress. Besides, Sleemon is intentionally targeting family in term of TV commercials



KingKoil: Showing production process to earn trust



Key messages



How to deliver messages

- Kingkoil's craftsmanship is very exquisite.
- Kingkoil provides consumers with a good sleep quality and protection of spines.

Publicizing manufacturing process

Highlighting experts' authentication on posters



Content & Differentiation

- Kingkoil published its production process in workshops to show how elaborate the mattress manufacturing process is. The goal is to tell audience that Kingkoil pays a great attention to its craftsmanship.
- Kingkoil emphasizes that it is an experienced brand with a century of history and qualifications from experts



Target audience



Kingkoil's target audience are people who are detail-oriented and highly demanding when it comes to spend money on mattresses.



TV Commercials



TV Commercials



Poster

DeRUCCI: Targeting high-income consumers



Key messages

DeRUCCI provides a high-end customized mattress that promotes high quality sleep



Making advertising style feel like a luxury brand with dark color and deep symphony.

Taglines on posters to show the brand can offer customized mattresses.



How to deliver messages



Content & Differentiation

- DeRUCCI highlighted its customized service to market high-income consumers in China.
- DeRUCCI doesn't introduce material and technology they applied in mattresses. Instead, DeRUCCI tries to use passionate speech to make the brand elegant. This advertising style is distinctive comparing to other brands, and is more similar to luxury brands.



Target audience



DeRUCCI targets middle-class or upper-class consumers who prefer high-end brands



TV Commercials



TV Commercials



Poster

MLILY: Good mattress can easily relieve physical and mental pressure



Key messages

Mattress helps relieve physical and mental pressure



Repeating taglines of "Zero pressure" in videos several times.

Showing how people can sleep very well in different positions on Mlily's mattresses.



How to deliver messages



Content & Differentiation

- MLILY shows they understand that people from all backgrounds suffer from stress, and they continue to bear pressure on their beds. Thus, MLILY spreads the concept of "zero pressure sleep", meaning MLILY's mattress can relieve physical and mental pressure. Consumers can sleep mentally and physically free on MLILY's mattress, no matter how they sleep.
- Projecting advertisings on CCTV programs to increase brand's credibility



Target audience



MLILY targets people suffering high pressure in the society from all kinds of class, especially office workers.



Cheer: Couples can have a harmonious relationship by using its mattresses



Key messages

Mattress helps build harmonious relationships

The mattress has shockproof technology



How to deliver messages

Using 2 different family scenes, one with Cheer's mattress and another without it, to show Cheer's mattress can help couples avoid arguments.



Content & Differentiation

Cheers believes that sleep quality is a factor in the quality of romantic relationships, a good mattress can create harmonious sleep. Through filming a sitcom ad, cheers proves how silent the mattress is, when people on the other side toss and turn. It helps couple avoid unnecessary arguments.



Target audience



Cheers has a strong inclination to target young couples with a comical yet relatable message.



TV Commercials



TV Commercials

Daziran: Natural materials ensure the health of consumers



Key messages

Daziran's mattress is natural and environmentally friendly.



How to deliver messages

Once people sleep on Daziran's mattress, the scene is changed into forests, making people feel like being in nature

Telling audience that their products are made by natural materials and explaining their origins.



Content & Differentiation

- Daziran's campaign was developed around nature. Just like its name, Daziran (which literally translates to 'Nature'), its materials are from natural and environmentally friendly sources. Nowadays, consumers pay more attention on protecting environment. Thus, propagandizing that mattresses' materials are environmentally friendly can get audience's favor.
- Although the style is similar to Airland, Daziran emphasizes the environmentally friendly materials they use, while Airland does not.



Target audience



Daziran targets people who care about environment protection and prefer natural and environmentally friendly products.



Unique selling points for each mattress brand



Serta

Serta's mattress provides a comfortable sleep experience that helps people **fall asleep quickly**



Sealy

Sealy's mattress is precisely supportive by applying **Posturepedic technology**



Airland

Airland attaches importance to mattress' quality for **54 years**



Tempur

Supported by **NASA's technology**, Tempur's mattress makes people feel weightless



Daziran

Daziran's materials **are natural, healthy and environmentally friendly**, since its mattress is made by palm fiber and natural latex.



Sleemon

Sleemon is devoted to providing **spinal protection** to consumers.



MLILY

MLILY is the first to put forward **zero pressure** concept in China. After 17 years' development, MLILY's mattress can relieve both physical and mental pressure for consumers.



Kingkoil

Kingkoil is known for its fine craftsmanship which is inherited for more than **100 years experience** of mattress.



DeRUCCI

DeRUCCI is able to provide a combination of support, comfort, body care, and luxury with the help of complete **ergonomic bedding system**.



Cheers

Cheers can build a relaxing and comfortable environment with the help of a **scientific intelligent sleep system**.

Materials and technologies behind mattresses



The main types of mattress materials in China

Latex mattresses that are porous and have high elasticity are highly sought after because of their ability to conform to the curves of the human body and improve sleep quality.

Main types of mattress materials in China



Spring mattress



Latex mattress



Sponge mattress



Palm mattress



3D mattress



**Other mattress
(memory cotton, etc.)**

The TOP 3 mattresses on Taobao & Tmall by materials (2020H1)

Types of mattress	Sales revenue (million RMB)	Features
Latex mattress	1,372.43	Good elasticity, good ventilation, forms to the curve of the human body, provides a full range of support, and the latex is sterilized and insect-resistant.
Coconut palm mattress	531.63	Palm fiber is woven with good flexibility and moderate hardness, but natural materials may have worms or mildew.
Spring mattress	509.16	Good elasticity, need to pay attention to maintenance, excessive stress can easily cause some places to collapse, and will also affect sleep for a long time.

Source: Taosj (淘数据)

Supporting technology and latex materials are widely used

e.g. Serta

Global advance technology to create comfortable sleep

核心技术 缔造舒适睡眠



- 1 | Continuous Support Innerspring**
Serta's continuous springs provide balanced and contoured support. Meanwhile, it increases the bearing capacity and reduces spring breakage caused by knots or sharp turns.
- 2 | Comfort Quilt**
The special surface structure of Serta's mattress can effectively disperse the body weight and reduce interruptions during sleep.
- 3 | Perimeter Edge**
This technology effectively reduces the sag caused by insufficient edge support of the mattress, greatly increases the surface area of the mattress, and brings a better quality and comfortable sleep.
- 4 | Materials**
Stainless steel spring, high resilience latex; gel memory foam and soothing sponge.

TOP selling SKUs of Serta



Serta/美国舒达梦享88经典款乳胶床垫1.8m弹簧床席梦思旗舰店官
总销量: 4624 | 评价: 918

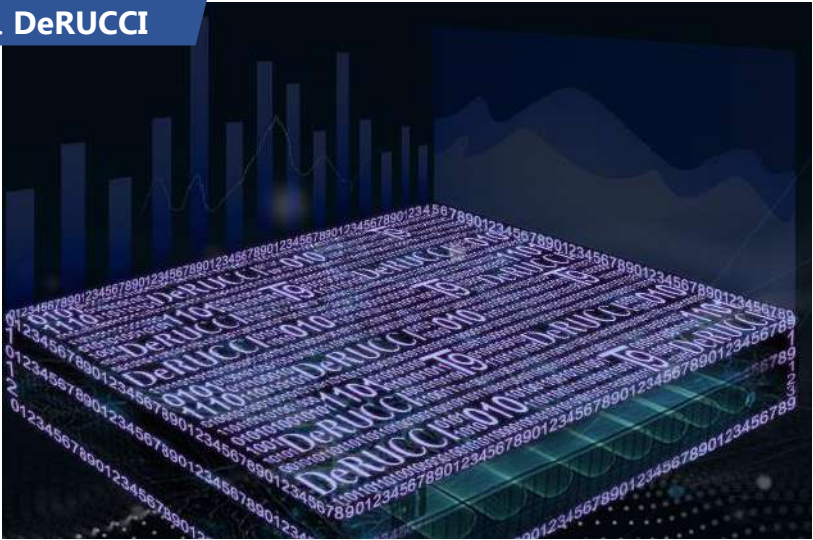
- The best selling latex mattress on **Tmall** comes with Comfort Quilt and Perimeter Edge technologies.
- The premium version of the classic Serta mattress in Tmall, and the price is moderate compared with other high-end Serta mattresses, hence consumers went for the mid-high price range.



- The best selling mattress on **JD.com**, which is an anti-mite latex mattress with "Perimeter Edge technology".
- Consumers' choices for mattresses favor the function of protecting the spine, and this mattress happens to be a spinal protection mattress with a promotion, which makes it the best selling one.

AI sleeping systems with 3 different materials

e.g. DeRUCCI



1 | DeRUCCI fourth generation sleeping system

- The built-in speakers of the fourth-generation system can be seamlessly connected with smart devices, and the non-interfering split design allows couples to have a relatively independent and exclusive space even on the same bed.
- The amount of negative ions released by the air purification system can reach 1200-5000 per cubic centimeter, which fully meets the natural environment standard and can be called an 'oxygen bar' in the bedroom.

2 | DeRUCCI sixth generation sleeping system (The latest version)

- The sixth-generation system can be connected with the T9 smart mattress through the smart sleep app to collect body data such as human height, weight, and sleeping habits.
- Taking consumers as the center, it automatically recognizes, adapts and adjusts the mattress softness to fit the body curve, which improves the length and quality of sleep.

3 | Materials Latex, spring, coconut palm.

TOP selling SKUs of DeRUCCI



¥4599.00

【官方抽检】慕思床垫 独立弹簧
席梦思泰国原液天然乳胶床垫
总销量: 38901 | 评价: 3656

- The best selling mattress on **Tmall**, which is a latex mattress with independent springs.
- Tmall users generally purchase this mattress during the new house decoration. Since this mattress has a low price in the overall mattress of DeRUCCI, and there still are multiple models to choose from, so it becomes the first choice for Tmall users.



慕思 (de RUCCI) 乳胶床垫3CM加厚静音独立袋装弹簧护脊软硬两用 臻享版 (立即发)

¥ 7299.00

已有2200+人评价

立即购买

- The best selling mattress on **JD.com**, which is the upgraded version of the best-selling mattress on Tmall, featuring smart springs.
- JD users normally choose this mattress to replace the previous mattress in their home, so they would choose an upgraded version..

Zero-pressure memory foam mattress pioneer in China

e.g. MLILY



1

Non-temperature sensitive zero-pressure memory foam technology

- Mlily's zero-pressure cotton technology has obtained patent certification in China, the United States, Denmark and Canada.
- Zero-pressure memory foam absorbs and disperses pressure and promotes deep sleep. Regardless of body shape and size, anyone can achieve a head-to-toe fit. Tossing and turning does not wake up a partner. Mlily's non-temperature sensitive zero pressure cotton technology can maintain a comfortable temperature any time of year.

2

Environmental protection raw materials

- The Mlily team constantly innovates and independently develops environmentally friendly materials.
- In order to ensure the quality of each product, they also developed machinery and equipment to accurately measure the proportion of raw materials, which greatly reduced the probability that mattresses do not meet the standards.

TOP selling SKUs of MLILY



MLILY酒店零压床垫记忆棉1.8m/儿童学生高低床软垫1.5米单人定
总销量: 2158 | 评价: 789

- The best selling memory foam mattress on **Tmall** has zero-pressure cotton technology.
- Since younger groups have higher and higher requirements for sleep quality, they would choose mattresses that are suitable for their dorms and have reasonable prices.



Mlily梦百合床垫 朗怡0压厚垫 独立弹簧静音记忆绵护脊床垫 两面可用 朗怡0压床垫

¥ 3939.00

已有100+人评价

立即购买

- The best selling silent memory foam mattress on **JD.com** has independent springs and zero-cotton technology.
- This mattress can be used for both front and back (soft & hard), and it has a 180-day trial sleep service, If consumers are not satisfied, they can return it for free, which meets the needs of most consumers.

Natural palm with a 3-layered structure

e.g. Daziran



1 | Mountain Palm Fiber Silk & Sisal Fiber Silk materials

- Through superb production technology, the palm fiber filaments are staggered to form a number of ventilation holes for all-dimensional and multi-dimensional ventilation. The growing environment of sisal is superior to mountain palm, so they are tougher and stronger.
- Therefore, by fully combining these two raw materials, Daziran has created a palm mattress that stands out from other brands.

2 | Scientific three-layer comfortable structure

- The comfort layer is made of delicate and comfortable fabrics.
- The slow-release layer morphs to the body shape.
- The support layer is made of unique plant fiber elastic material.

TOP selling SKU of Daziran



- Tmall** and **JD.com** have the same best-selling mattress which is the whole palm mattress. It uses the mountain palm fiber silk with three-layers but without springs which is suitable for consumers of all ages.
- For consumers who choose Daziran, its highlight is mountain palm fiber silk. Hence, during all the palm mattresses, they would take the most affordable and classic mattress to purchase. The price difference between the two platforms is because they have different preferential activities and incoming channels.



5

Key findings



Key takeaways

Mattresses with good sustainability and materials are favored by Chinese consumers

1

In China, sustainability is not only an environmental issue, but there is a perception that it has less pollutants. Materials are directly related to the quality of mattresses. Therefore, they are the first considerations when Chinese people buy mattresses.

Mattress and after-sale services are indivisible

2

In addition to the mattress itself, Chinese consumers prefer comprehensive after-sale services. Mattress brands can make a deep impression on consumers in a very short time with durable products paired with attentive services.

Mattress brands spend considerable amount on advertising their materials and tech

3

In order to build a reliable brand image, mattress brands in China are keen on showing their materials and technologies in TV commercials and posters. The unique selling points of these brands are mainly related to materials and technologies they use.

Having a good understanding of Chinese consumers is the key

4

Although there are many mattress brands have entered the Chinese market, there is still no an obvious leading brand. Therefore, if a brand can better cater to Chinese consumers' needs, it will have high loyalty consumer groups.

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