



soft landing
mattress recycling

MATTRESSES MATTER SUSTAINABILITY SURVEY

Consumer attitudes towards mattress
sustainability and recycling in Australia

June 2024



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Mattresses Matter Sustainability Survey

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BACKGROUND

The problem with end-of-life mattresses

According to the Australian Bedding Stewardship Council (ABSC), 1.8 million mattresses are disposed of each year in Australia, stretching from Darwin to the tip of Tasmania when laid end-to-end. 740,000 of these are sent to landfill, equating to approximately 22,000 tonnes of needless waste.

Each mattress can take up to 120 years to decompose, taking up enormous amounts of limited landfill space and contributing to environmental pollution. Meanwhile, the valuable resources contained within them – like steel and foam – are wasted.

Even in the best-case scenario where mattresses are recycled, many of the materials can't currently be recycled in Australia. For example, pocket springs greatly reduce the recovery of steel, and the recycling market for memory foam is limited. This leads to an additional 15,000 tonnes of mattress material being sent to landfill annually.

Due to the scale of the problem, mattresses were included in the **Minister's Product Stewardship Priority List** for 2023-2024, after first appearing on the list the year prior. The ACT has banned mattresses in landfill, and we are hopeful that other states may soon follow suit.

The key to breaking this cycle starts before consumers head to the checkout and ends when they dispose of their old mattress responsibly.



Key Takeaways

01

62% of Australian consumers say that sustainability is extremely or somewhat important to them when purchasing a new mattress.

02

93% of Australians are more likely to purchase from a retailer that recycles their old mattress – and over 4 in 5 are willing to pay for this service.

03

The vast majority of consumers are eager to recycle their end-of-life mattresses responsibly, but only **26%** have used a mattress recycling service in the past; **65%** would like to in the future.

04

Lack of recycling services, uncertainty of services available, and cost are the top three barriers to mattress recycling.

05

96% of Australian consumers say it's important that their local council provides a free mattress collection and recycling service through an Approved Recycler.

06

To improve rates of mattress recycling in Australia, we need to ensure consumers have the right information and the right support from both mattress retailers and local councils.

ABOUT THE SURVEY

Helping Australians realise that mattresses matter

The Mattresses Matter – Sustainability Survey, conducted by Soft Landing Mattress Recycling, received 1,016 responses from adult mattress consumers in Australia.

The survey consisted of ten multiple choice questions, analysing consumers' opinions and behaviours regarding the sustainability and recycling of mattresses. Respondents could choose to remain anonymous or enter their email for a copy of the results.

As Australia's largest mattress recycler, we launched this survey to raise awareness about the issue of end-of-life mattresses in landfills, educate consumers on the avenues available to them to recycle their old mattresses responsibly, and gather data to support our partnerships with mattress retailers and local councils.

The results will support our mission to collect and recycle all of Australia's old mattresses while creating jobs for people who need them most.

The goal?
To end mattresses
in landfill, for good.

N= 1,016 Survey Dates: 27 Feb 2024 - 29 April 2024 Confidence Level: 95% Margin of Error: 5% Respondents: Australian mattress consumers aged 20+

1.8 million
mattresses are
disposed of each
year in Australia.

AUSTRALIAN BEDDING STEWARDSHIP
COUNCIL (ABSC)



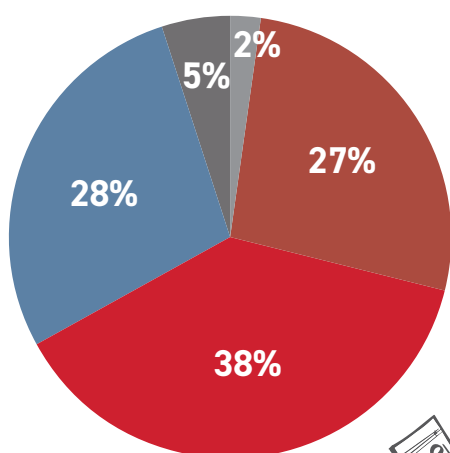
SURVEY REPORT

Australian consumers expect more from their mattresses than just comfort.

A mattress is no impulse purchase.

They're expensive items that are built to stand the test of time, with the average mattress lasting 7-10 years. So how often are Australian consumers purchasing a new mattress? In our survey:

- 2% say less than 5 years
- 27% say every 5-10 years
- 38% say every 10-15 years
- 28% say more than 15 years



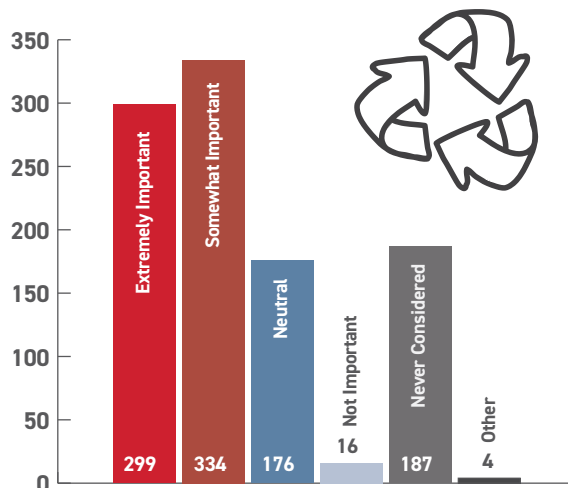
- LESS THAN 5 YEARS
- 5-10 YEARS
- 10-15 YEARS
- MORE THAN 10-15 YEARS
- NOT SURE



Considering how infrequently consumers purchase a new mattress and how much thought goes into the decision when they do, manufacturers and retailers must evolve to meet the increasing demand for mattresses that aren't just comfy – but sustainable, too.

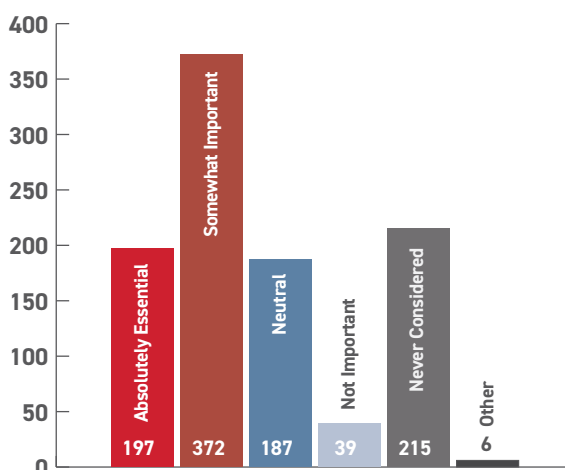
When it is time to purchase a new mattress, there's a lot to consider; consumers aren't in a rush to pick up just any mattress from the store. They're shopping around, doing their research to find the best deal to suit their individual needs, and increasingly, they're thinking about sustainability.

62% of Australian consumers say that sustainability is extremely or somewhat important to them when purchasing a new mattress.



This expectation goes beyond the mattress being made with sustainably sourced materials; over half of Australian consumers are also thinking about the mattresses' end-of-life, saying they want the mattress components to be recyclable.

Over half of Australian consumers (56%) say it's absolutely essential or somewhat important that their new mattress is made with recyclable materials.



SURVEY REPORT

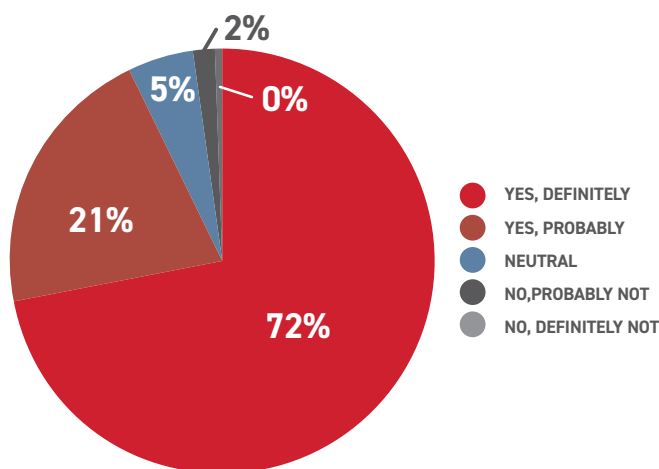
Australians are more likely to purchase from a retailer that recycles their old mattress – and they're willing to pay for it.



Mattresses are difficult items to dispose of; they're heavy, bulky pieces of furniture that take up room and are prone to mould, bacteria and dust mites. Understandably, mattress owners tend to want them out of the way as quickly as possible.

Progressive mattress retailers across Australia partner with us to solve this problem for consumers through our mattress collection and recycling service. But does the availability of this service impact where customers choose to shop for their new mattress?

93% of Australian consumers say yes: they would be more likely to purchase from a retailer that offers mattress collection and recycling of their old mattress.

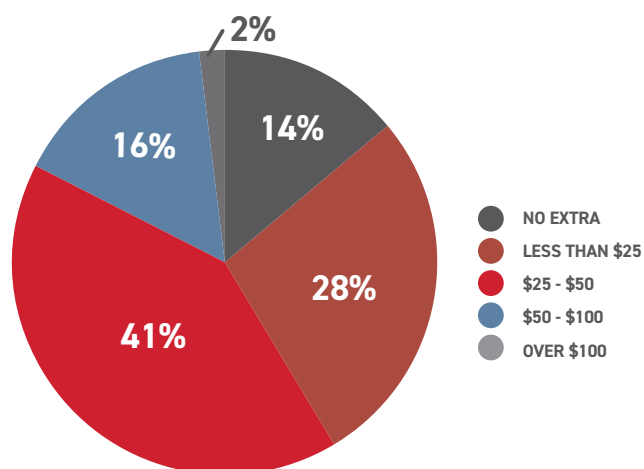


72% of Australian consumers say they would definitely be more likely to purchase from a retailer that offers mattress collection and recycling of their old mattress, while 21% say yes, probably. Only 2% of consumers say this service would not influence their purchasing decision.

Interestingly, while 56% of consumers say that price is a top three influencing factor when purchasing a new mattress, over three quarters (86%) are willing to pay extra if a mattress collection and recycling service is included.

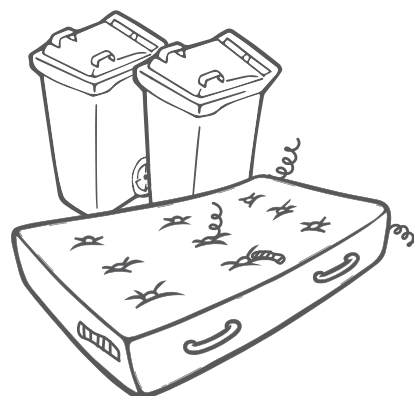
- 28% will pay up to \$25
- 41% will pay \$25-\$50
- 16% will pay \$50-\$100
- 2% will pay over \$100

86% of Australian consumers say they are willing to pay extra if a mattress collection and recycling service is included.



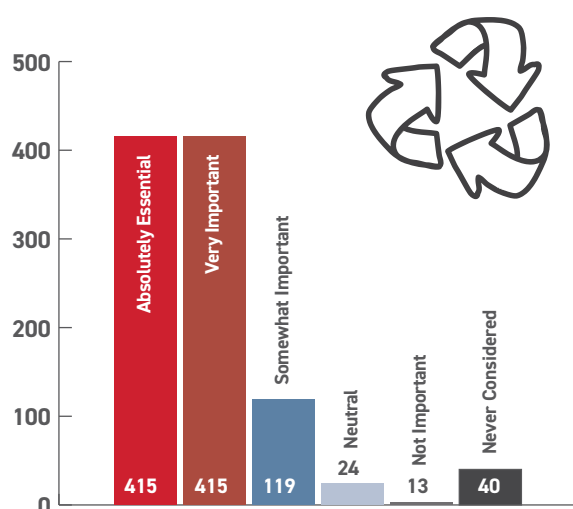
SURVEY REPORT

Consumers are eager to recycle their end-of-life mattresses responsibly, but uptake of mattress recycling services remains low.



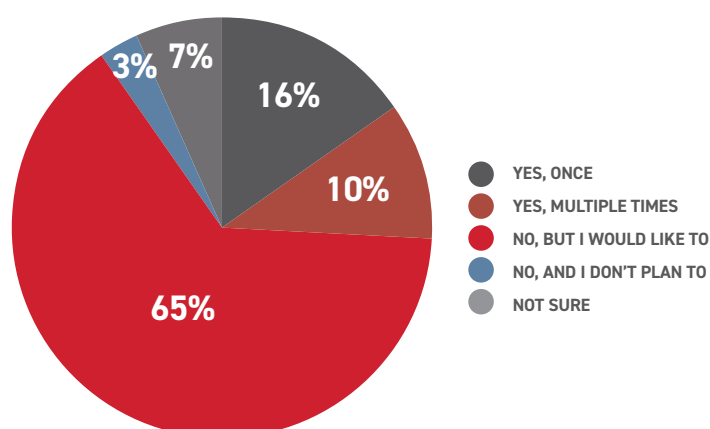
When the time finally comes to dispose of an old mattress, Australians are eager to do the right thing and recycle it responsibly. Less than 1% of consumers say it's not important to them, and only 4% have never considered it.

The vast majority of consumers (93%) say that it is absolutely essential, very important or somewhat important to them that their old mattress is recycled responsibly.



Given these positive consumer attitudes towards mattress recycling in Australia, it's surprising then, that the use of mattress recycling services remains low.

While only one-quarter (26%) of consumers say they've used a mattress recycling service at least once, including through a mattress retailer or their local council, almost two-thirds (65%) say that they haven't used a recycling service before, but would like to.



These numbers beg the question:

If most Australians want to recycle their end-of-life mattresses responsibly, why aren't more consumers accessing recycling services?

SURVEY REPORT

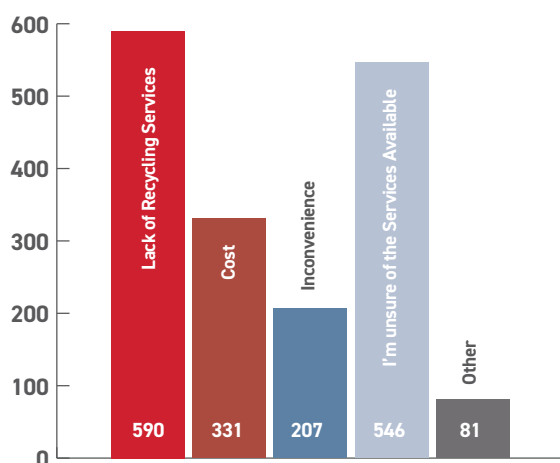
Lack of recycling services, uncertainty of services available, and cost are the top 3 barriers to mattress recycling.

Consumers aren't always sure how to dispose of their mattress responsibly.

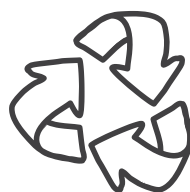
This can lead to illegal dumping, which is a persistent problem in Australia. The old mattresses are discarded on suburban streets or in bushlands, polluting our waterways and ecosystems. Alternatively, consumers take their mattresses straight to landfill.

So, what do Australian consumers cite as the top barriers to mattress recycling?

- 58% say lack of recycling services
- 54% say they're unsure of the services available
- 33% say it's the cost
- 20% say it's inconvenient



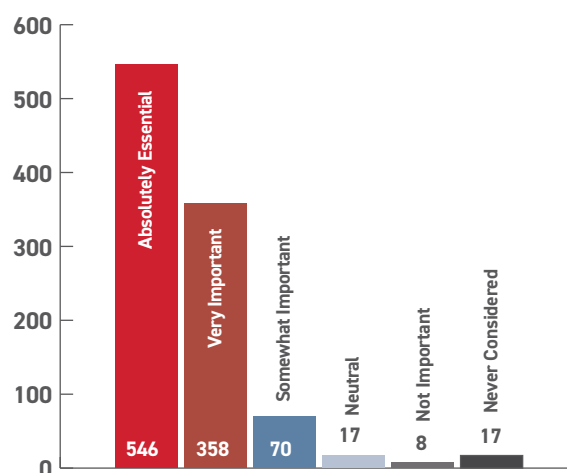
8% of consumers cite other reasons, with common responses including difficulty transporting the mattress, long waits for council pickups, large distances to recycling sites in rural and regional council areas, and a lack of trust that they're actually being recycled.



While progressive local councils work with us, and other ABSC Approved Recyclers, to collect and recycle residents' mattresses for free, many others do not offer this service. Australians want this to change.

96% of Australian consumers say it's important that their local council provides a free mattress collection and recycling service through an Approved Recycler.

- 54% say it's absolutely essential
- 35% say it's very important
- 7% say it's somewhat important
- 2% say they've never considered it



Offering a free collection and recycling service to residents in metro areas and viable regional and rural areas may help to reduce a large percentage of the mattresses that are dumped or landfilled each year.

Australians are saying they'll use the service if it's available – so why not give them the chance?

CONCLUSION

Ending mattresses in landfill, for good

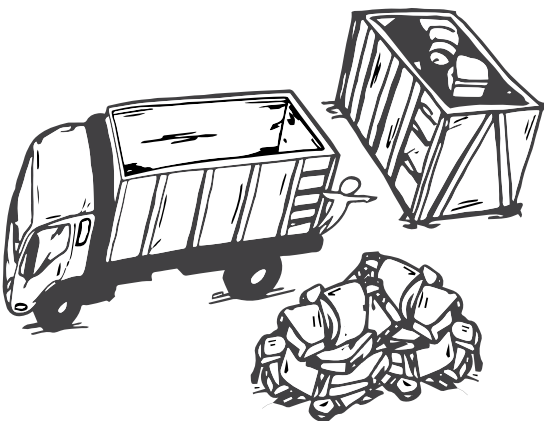
Australians care about protecting our planet and are increasingly interested in responsible recycling and the sustainability of their purchases. However, frustration arises when they're unable to find the information, services and support they need to commit to positive action.

To improve rates of mattress recycling in Australia, we need to ensure consumers have the right information and the right support from both mattress retailers and local councils.

By partnering with responsible, ASBC Approved Mattress Recyclers like Soft Landing, retailers and councils can make recycling end-of-life mattresses an easy option for consumers, reducing mattresses on our streets and in landfills.

Solving the mattress problem for good requires a whole-of-industry approach where mattresses are made with sustainable materials and designed to be recyclable. However, if we can raise awareness at the consumer level and support Australians to recycle responsibly, then we've won half the battle.

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What actions can you take?

CONSUMERS

1. Book a mattress collection through our online portal: softlanding.com.au/book
2. Ask your mattress retailer if they partner with us to recycle your old mattress; shop with a retailer that does provide this service.
3. Email your local council and ask if they partner with us to recycle residents' mattresses; if not, ask them to provide this service.

RETAILERS

1. Partner with us to collect and recycle consumers' old mattresses.
2. Stock mattresses that are made with recyclable materials.

COUNCILS

1. Partner with us to collect and recycle residents' old mattresses, and to recycle mattresses taken to local landfills.



SURVEY QUESTIONS

How often do you purchase a new mattress?

- Less than 5 years
- 5-10 years
- 10-15 years
- More than 15 years
- Not sure

What are the most important features you look for when purchasing a mattress? (select up to 3)

- Comfort & Support
- Durability
- Price
- Sustainability & Recyclability
- Brand
- Other

How important is sustainability to you when purchasing a mattress?

- Extremely important
- Somewhat important
- Neutral
- Not important
- Never considered

When purchasing a new mattress, how important is it to you that it's made with recyclable materials?

- Absolutely essential
- Somewhat important
- Neutral
- Not important
- Never considered

Would you be more likely to purchase from a retailer that offers mattress collection and recycling of your old mattress?

- Yes, definitely
- Yes, probably
- Neutral
- No, probably not
- No, definitely not

Would you be willing to pay extra for a mattress if the retailer included a mattress collection and recycling service of your old mattress? If so, how much?

- No extra
- Less than \$25
- \$25-50
- \$50-100
- Over \$100

Have you ever used a mattress recycling service before (including through your mattress retailer or local council)?

- Yes, once
- Yes, multiple times
- No, but I would like to
- No, and I don't plan to
- Not sure

How important is it to you that your old mattress is recycled responsibly?

- Absolutely essential
- Very important
- Somewhat important
- Neutral
- Not important
- Never considered

What are the biggest barriers to recycling your mattress? (select up to 3)

- Lack of recycling services
- Cost
- Inconvenience
- I'm unsure of the services available
- Other

How important is it to you that your local council provides a free mattress collection and recycling service through an Approved Recycler?

- Absolutely essential
- Very important
- Somewhat important
- Neutral
- Not important
- Never considered

REFERENCES

www.dcccew.gov.au/environment/protection/waste/product-stewardship/ministers-priority-list-23-24#mattresses
www.beddingstewardship.org.au/end-of-life-mattresses-are-a-growing-problem-not-only-in-australia-but-globally
<https://www.beddingstewardship.org.au/recycling/>



For every 23 mattresses that
we collect and recycle each day,
we create a job for someone
who really needs one.

Soft Landing is Australia's largest mattress recycler

We are a national social enterprise that collects and recycles mattresses and bed bases to keep waste out of landfill and create jobs for people experiencing barriers to work.

We're an Australian Bedding Stewardship Council (ABSC) Approved Recycler operating in NSW, VIC, WA and the ACT across five sites.

We work with progressive local councils and mattress retailers to recycle residents' mattresses, and we service Australians directly through our online mattress collection booking system.

Our revenue goes entirely to delivering our work. Through our manual deconstruction method, we're able to recover the highest percentage of mattress components (up to 75%) to recycle while maximising our social impact.



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