Inside the Mind of Today's Mattress Consumer

Quarterly Tracker: Q4 2020

There's no argument that 2020 was a crazy year. Uncertainty, turmoil and change hit virtually everyone and all sectors of the economy, including the bedding products industry. Unlike other sectors of the economy, mattress sales and revenue were strong in 2020, but how companies did business and how consumers thought about, shopped and bought bedding products underwent significant transformation.
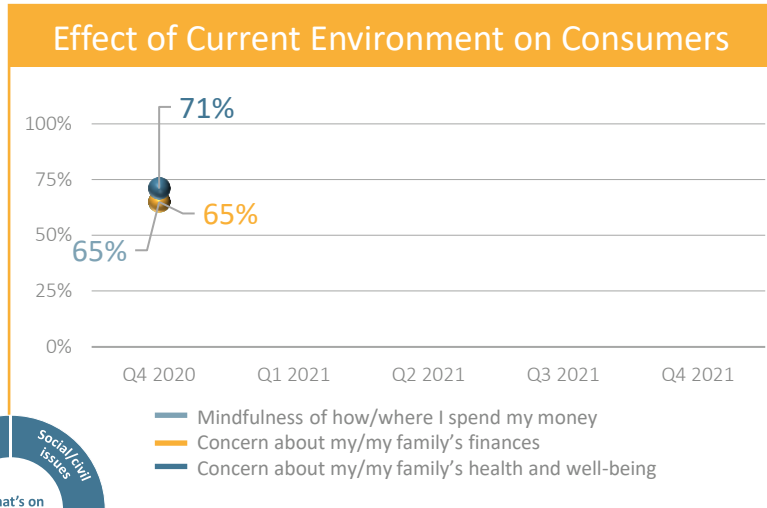
To give the industry insight into shifting consumer attitudes and behaviors in this environment, the Better Sleep Council has set about to conduct a quarterly national survey of mattress buyers. The initial study, conducted in late November, surveyed 500 people, all of whom had purchased a mattress in the last month or planned to do so within 30 days.

The study uncovered several interesting facts about mattress shoppers' mindsets and actions, and about how they're adapting to the current environment. For example:

- Mattress buyers say a good night's sleep is even more important than diet and exercise when it comes to their health.

- With home being the place where people have to live, work and attend school, consumers are spending money on all kinds of things to optimize their homes – and the broad category of bedding products is their top purchase, while mattresses rank fifth.

- Not surprisingly, people are buying mattresses online more frequently, but they miss the in-store shopping experience.

- With so much of their lives being affected by change, people are reacting by searching for and shopping new brands and retailers.
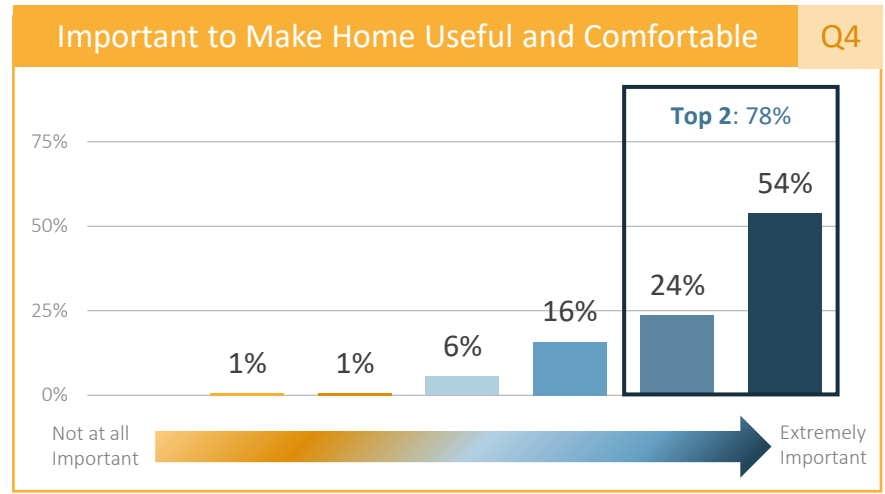
More details about what mattress shoppers are thinking, feeling and doing are captured on the next several slides.
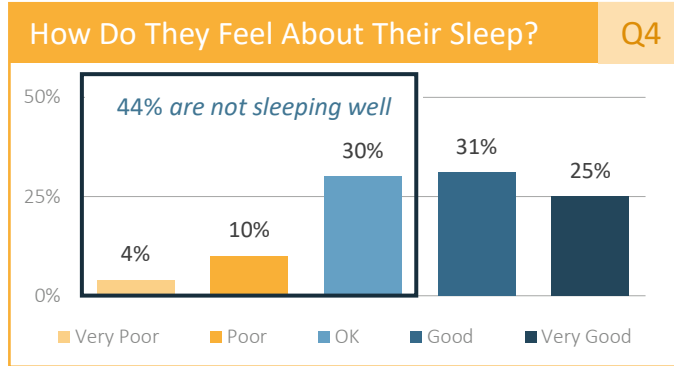
How Are People Feeling About Their Lives?

Effect of Current Environment on Consumers

71%
65%
65%

- Mindfulness of how/where I spend my money
- Concern about my/my family's finances
- Concern about my/my family's health and well-being

(Chart: Q4 2020, Q1 2021, Q2 2021, Q3 2021, Q4 2021)

What's on Their Minds
- Politics/political climate
- Social/civil issues
- Public/personal health
- Economy/financial outlook

Current Consumer Concerns

Current Consumer Concerns	Rank	Q4
Public/personal health	1	
Economy/financial outlook	2	
Social/civil issues	3	
Politics/political climate	4	

Consumer Confidence — Q4

Shopping/Purchasing Online

Going to a Doctor

Shopping/Purchasing In-Store

Traveling/Patronizing a Public Establishment

Consumer confidence in travel and going to public places (e.g., restaurants) is still quite low.

Important to Make Home Useful and Comfortable — Q4

Top 2: 78%

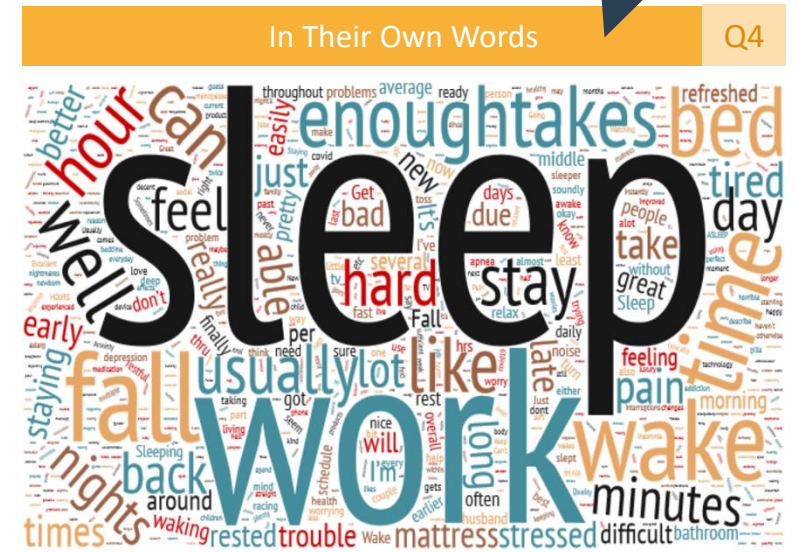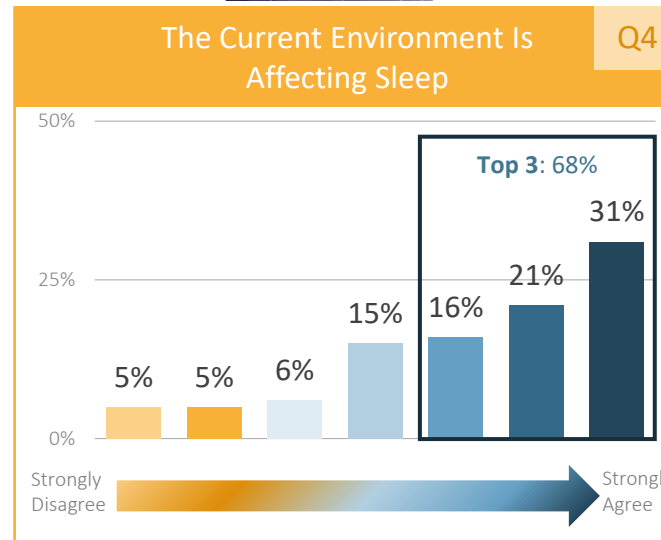1%   1%   6%   16%   24%   54%

Not at all Important → Extremely Important

Consumers are more comfortable shopping and purchasing online than shopping and purchasing in-store.

How Are People Sleeping?

How Do They Feel About Their Sleep? Q4

44% are not sleeping well

- Very Poor: 4%
- Poor: 10%
- OK: 30%
- Good: 31%
- Very Good: 25%

Importance of Sleep Q4

	Rank	Previous Rank	Q4 2020
Good night's sleep	1	-	75%
Relationships with family/friends	2	-	70%
Stress management	3	-	66%
Healthy diet	4	-	62%
Mental health and self-care	5	-	62%
Regular medical checkups	6	-	60%
Balancing work schedule and personal life/obligations	6	-	60%
Physical exercise	7	-	58%

Economy/financial outlook

Public/personal health

Politics/political climate

Social/civil issues

The Current Environment Is Affecting Sleep Q4

Top 3: 68%

- 5%
- 5%
- 6%
- 15%
- 16%
- 21%
- 31%

Strongly Disagree → Strongly Agree

In Their Own Words Q4

"I love our bed! It is perfect for us."

"I am tired due to not much sleep … the COVID-19 problem."

"Before I got my new mattress it was bad but now it's decent."

"I don't get nearly enough sleep, and living in Florida, the room and mattress temperatures are always too warm."

"I have a lot of stress due to our current living situation and financial worries, which affects my sleep tremendously."
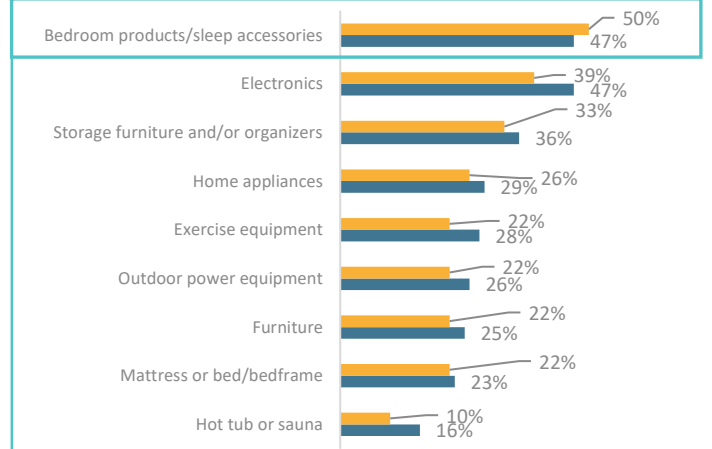
Q4 label refers to responses received during the fourth quarter of 2020.

What Are People Buying?

Top Home Purchases* — Q4

	Purchased	Plan to Purchase
Bedroom Products	1	2
Electronics	2	1
Storage Furniture/Organizers	3	3
Mattresses	5	8

Purchasing Behavior Trends: Online or In-Store

Mattress
- Online: 60%
- In-Store: 39%

(Q4 2020, Q1 2021, Q2 2021, Q3 2021, Q4 2021)

Bedroom Products/Sleep Accessories
- Online: 62%
- In-Store: 37%

(Q4 2020, Q1 2021, Q2 2021, Q3 2021, Q4 2021)
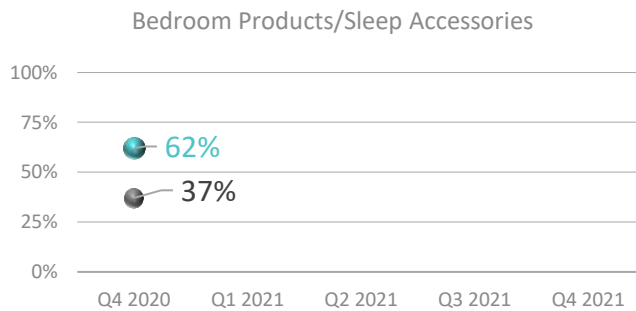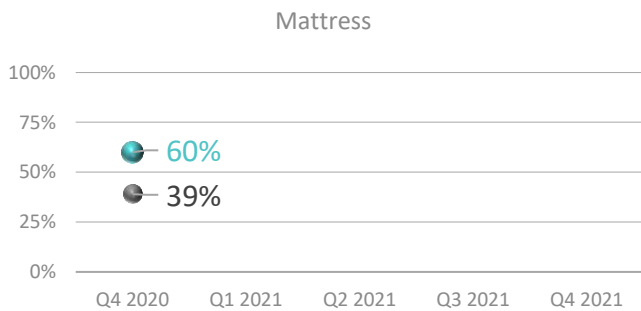
■ Online ■ In-Store

Purchases for Their Homes — Q4

Category	Purchased	Plan
Bedroom products/sleep accessories	50%	47%
Electronics	39%	47%
Storage furniture and/or organizers	33%	36%
Home appliances	29%	26%
Exercise equipment	22%	28%
Outdoor power equipment	22%	26%
Furniture	22%	25%
Mattress or bed/bedframe	22%	23%
Hot tub or sauna	10%	16%

Bedroom Products/Sleep Accessories — Q4

Category	Purchased in the last 30 days	Plan to purchase in the next 30 days
Basic bedding	77%	60%
Blackout curtains	34%	32%
Temperature-regulating bedding	29%	34%
Weighted blanket	29%	30%
Sound machine	21%	19%
Connected/electronic sleep product	19%	30%
Other	2%	1%

■ Purchased in the last 30 days ■ Plan to purchase in the next 30 days

Q4 label refers to responses received during the fourth quarter of 2020.

*A home optimization purchase encompasses one of the following products: mattress and/or bed/bedframe, furniture, home appliance, electronics, bedroom products/sleep accessories, exercise equipment, outdoor power equipment and/or garden supplies, storage furniture and/or organizers, hot tub or sauna.

The Better Sleep Council   marcusthomas

How Are People Buying and Shopping for Mattresses?

Online Behaviors

Prefer Purchasing Online

67%
59%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021

Shopping More Online

75%
62%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021
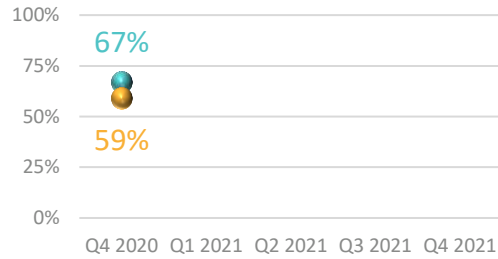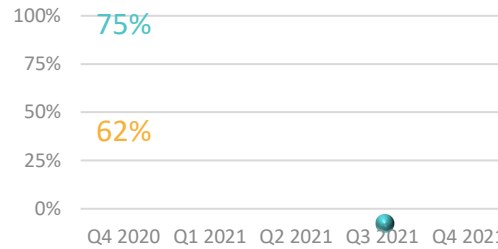
Attitudes Toward Retailers

Purchasing at New Retailers

78%
59%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021

Shopping at New Retailers

70%
46%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021

Shopping More Locally

63%
48%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021
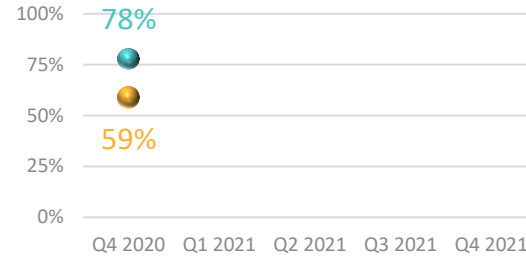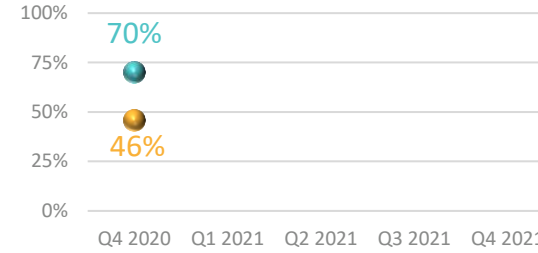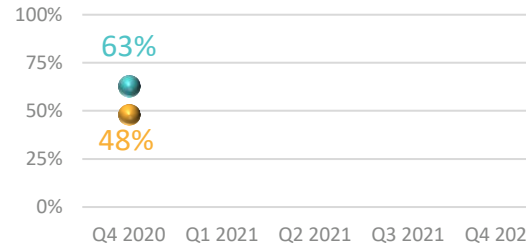
Shopping at COVID-Compliant Retailers

72%
62%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021
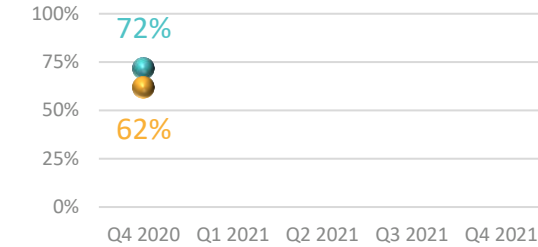
Other Attitudes/Behaviors

Spending More on Home

71%
68%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021
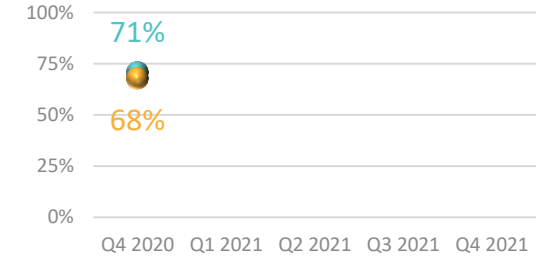
Missing In-Store Shopping Experience

67%
48%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021
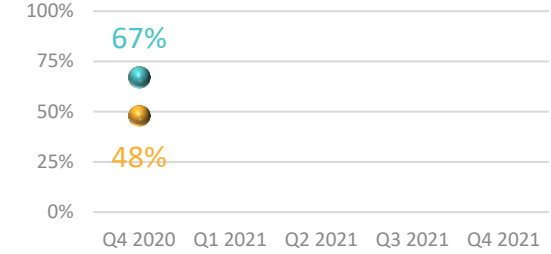
Attitudes Toward Brands

Purchasing New Brands

75%
64%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021

Shopping for New Brands

80%
56%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021

Buying Trusted Brands

71%
55%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021
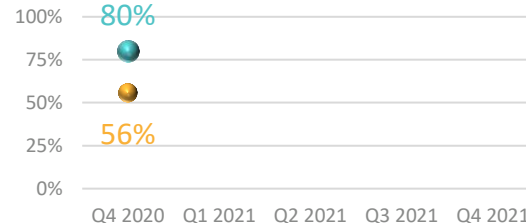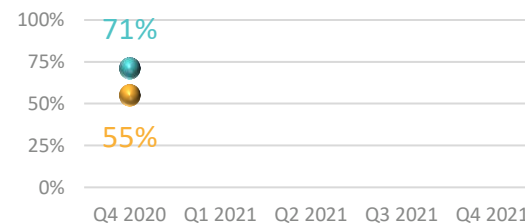
Buying Brands that Align with My Values

68%
54%

Q4 2020 · Q1 2021 · Q2 2021 · Q3 2021 · Q4 2021

— Mattress   — Bedroom Products/Sleep Accessories*

Appendix

- 500 online surveys were completed Nov. 20 through Dec. 1, 2020, with adults 18 years and older
  - A sample size of 500 provides a 95% ±4.38% margin of error

- Screening criteria ensured respondents had either purchased in the last month or were planning to purchase in the next month at least one home optimization product
  - Home optimization products/categories included: mattress or bed/bedframe, furniture, home appliance, electronics, bedroom products/sleep accessories, exercise equipment, outdoor power equipment and/or garden supplies, storage furniture and/or organizers, hot tub or sauna

- 423 (95%) respondents had purchased at least one home optimization product
  - 249 (59%) purchased a mattress or bed/bedframe and/or bedroom products/sleep accessories
    - 92 of the total sample purchased a mattress or bed/bedframe*
  - 174 (41%) purchased home optimization products that were *not* a mattress or bed/bedframe or bedroom products/sleep accessories

- 77 (15%) were *planning* to purchase a home optimization product in the next month (but had *not* purchased one in the last month)

* Two respondents purchased a bed/bedframe only (without a mattress).

Survey Questions

SCREENER

- S1. Have you purchased any of the following? Select all that apply.
- S2. What kind of mattress did you purchase?
- S3. You mentioned that you have purchased bedroom products/sleep accessories (e.g., **not** mattresses; items like pillows, white noise machine, weighted blanket, etc.). What item(s) did you purchase? Select all that apply.

- S4. Do you *plan to purchase* any of the following items below?
- S5. What kind of mattress do you plan to purchase?
- S6. You mentioned that you plan to purchase bedroom products/sleep accessories (**not** mattresses; items like pillows, white noise machine, weighted blanket, etc.) in the next month. What item(s) are you planning to purchase? Select all that apply.

QUESTIONNAIRE (These questions were asked of respondents who had purchased at least one product from S1 in the last 30 days.)

- Q1. Which of the following were part of your *shopping* experience before your recent [PIPE IN S1] purchase? Select all that apply.
- Q2. Thinking about your *shopping* experience for your recent [PIPE IN S1] purchase, how much do you agree with the following statements? Please rate the following on a scale of 1 to 7, with 1 being strongly disagree and 7 being strongly agree.
- Q3. Where/how did you *purchase* your [PIPE IN S1]?
- Q4. Thinking about your recent [PIPE IN S1] purchase, how much do you agree with the following statements? Please rate the following on a scale of 1 to 7, with 1 being strongly disagree and 7 being strongly agree.
- Q5. to Q8. (Same as Q1. to Q4. but asked of respondents who did not purchase a home optimization product in the last 30 days but plan to in the next 30 days. [n=77]
- Q9. How important is it to you that you make your home more useful and comfortable for your needs?
- Q10. Thinking about making your home more useful and comfortable for your needs, how important to you are the following? Please rate the following on a scale of 1 to 7, with 1 being not at all important and 7 being extremely important.
- Q11. Thinking about your overall health and well-being, please rate the importance of the following factors on a scale from 1 to 7, with 1 being not at all important and 7 being extremely important.
- Q12. Thinking about your *current* sleep situation – how much you sleep, quality of sleep, how much time it takes to get to sleep, etc. – what best describes how well you are sleeping?
- Q13. Have you experienced any of the following **in the last 30 days**? Select all that apply.
- Q14. Thinking of your current sleep situation – how much you sleep, quality of sleep, how much time it takes to get to sleep, etc. – what **best** describes why you say your overall sleep has been [PIPE IN Q12]? Please be as specific as possible.
- Q15. How much do you agree that your sleep is affected by the current economic, social, health and political environment?
- Q16. Thinking about the *current* economic, social, health and political environment, how confident are you today with doing the following activities?
- Q17. Think about the current state of the world. Please rate how much the *current* economic, social, health and political environments are personally affecting *you* on each of the items listed below.
- Q18. Again, thinking about the current state of the world, please rank each of the following factors in order of which concerns you most, with 1 being the **most** concerning and 4 being the **least** concerning.

- Those who report they are sleeping poorly are more likely to say they have an uncomfortable sleeping environment.

		Reported Sleep Quality*		
		Poor	**OK**	**Good**
	Total	(A)	(B)	(C)
Sample Size	500	71	152	277
Total Mentions	1,528	322	501	705
Body pain/discomfort	51%	80% BC	61% C	38%
TV/electronics (staying up to watch TV, playing games, etc.)	47%	55%	41%	49%
Stress/depression/anxiety	46%	77% BC	55% C	34%
Insomnia	39%	80% BC	49% C	23%
Others disturbing your sleep (children, pet, spouse, etc.)	29%	35%	34% C	24%
Uncomfortable sleeping environment (bedding, temperature, lighting, etc.)	28%	42% BC	24%	27%
Not enough time to sleep (working, household chores, etc.)	22%	24%	24%	21%
Uncomfortable mattress	19%	31% C	24% C	13%
Nightmares/night terrors	18%	27% B	13%	18%
None of these	6%	1%	5%	8%

* Q12. Thinking about your *current* sleep situation – how much you sleep, quality of sleep, how much time it takes to get to sleep, etc. – what best describes how well you are sleeping?

- Almost two-thirds (62%) of respondents who report they are sleeping well have purchased a mattress in the last 90 days

  - About one-third (36%) of respondents who report they are sleeping OK have purchased a mattress in the last 90 days

  - Less than one-third (30%) of respondents who report they are sleeping poorly have purchased a mattress in the last 90 days

- Respondents who report they are sleeping well are more likely to have purchased a mattress in the last 90 days than those who report they are sleeping OK or poorly

| | | Reported Sleep Quality* | | |
Purchased a Mattress		Poor	OK	Good
	All	(A)	(B)	(C)
Sample Size	500	71	152	277
Purchased in the last 30 days	18%	8%	11%	25% AB
Purchased in the last 31-60 days	17%	7%	14%	21% A
Purchased in the last 61-90 days	14%	15%	11%	16%
Have not purchased in the last 90 days	50%	69% C	64% C	38%

* Q12. Thinking about your *current* sleep situation – how much you sleep, quality of sleep, how much time it takes to get to sleep, etc. – what best describes how well you are sleeping?
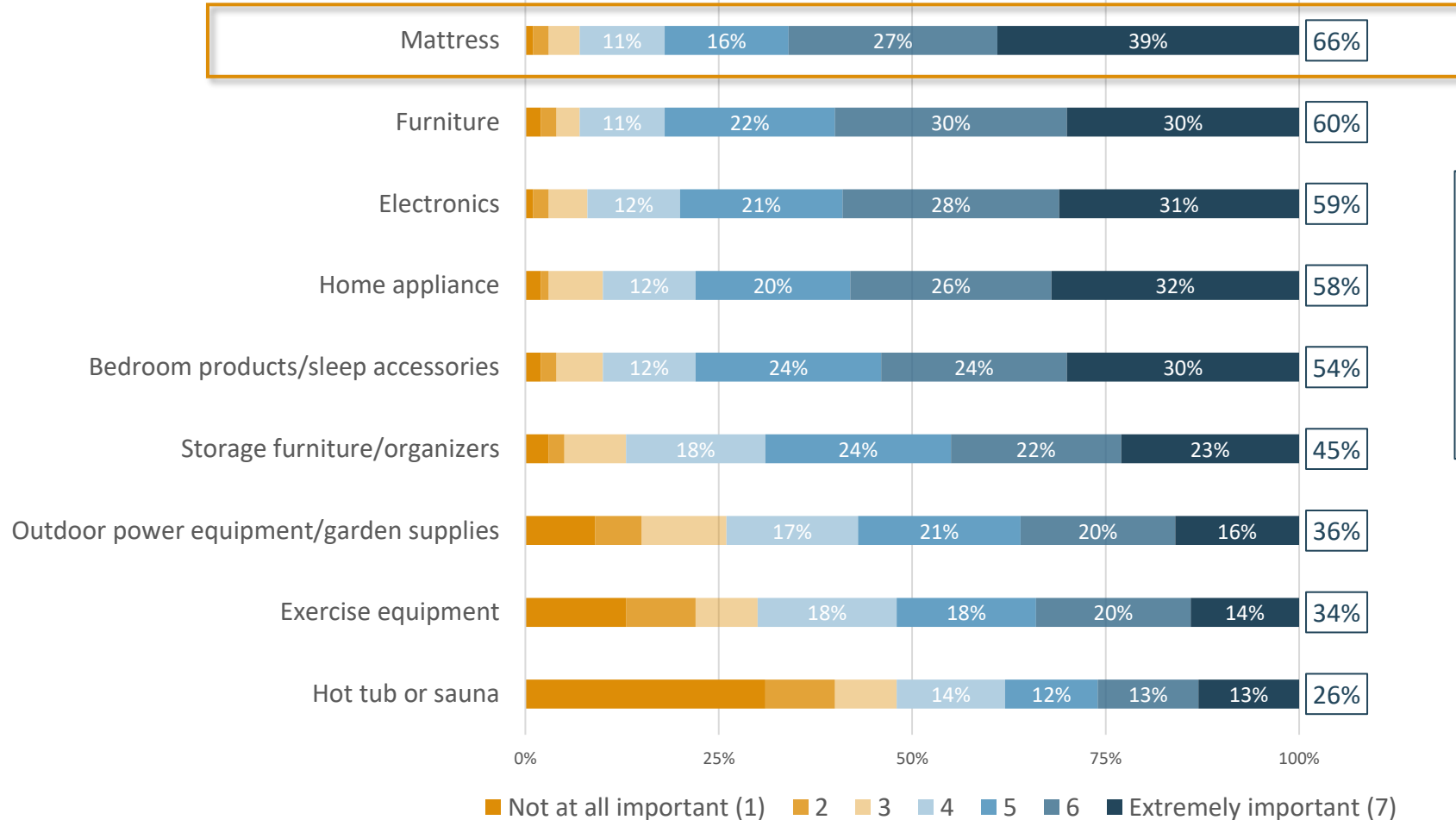
Shopping Experience of Recent Mattress Purchasers

Category	Percentage
Looked at online retailers/websites	47%
Searched for and read online reivews	45%
Social media	40%
Google searches	37%
Asked friends/family for recommendations	35%
Reviewed miscellaneous online resources (e.g., articles, blog posts)	30%
Looked through miscellaneous books/magazines/pamphlets	23%
Visited a brick-and-mortar retailer	21%

(n=92)

Important to Optimize home

Top 2 Box

		Top 2 Box
Mattress	11% 16% 27% 39%	66%
Furniture	11% 22% 30% 30%	60%
Electronics	12% 21% 28% 31%	59%
Home appliance	12% 20% 26% 32%	58%
Bedroom products/sleep accessories	12% 24% 24% 30%	54%
Storage furniture/organizers	18% 24% 22% 23%	45%
Outdoor power equipment/garden supplies	17% 21% 20% 16%	36%
Exercise equipment	18% 18% 20% 14%	34%
Hot tub or sauna	14% 12% 13% 13%	26%

0%   25%   50%   75%   100%

■ Not at all important (1) ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ Extremely important (7)
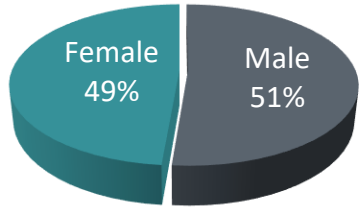
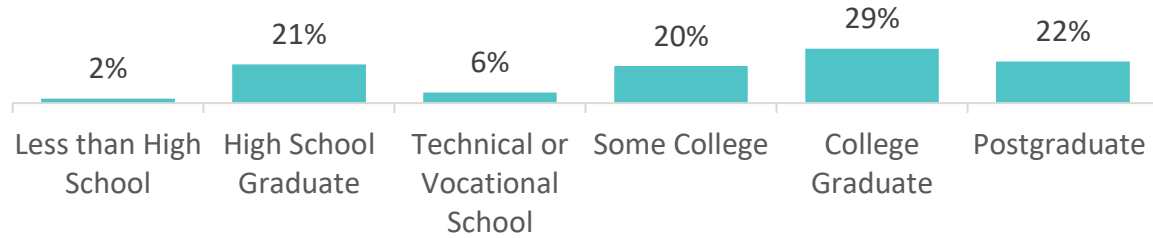Mattresses have the highest importance with respondents when asked about optimizing their homes.

- About 8% specifically mentioned something about stress, worry, anxiety and/or COVID-19

  - Of those, about 13% (n=5) mentioned COVID-19

    > *"It's better than in the far past. Stressed due to the COVID-19 situation."*

  - About 18% (n=7) referred to pandemic but didn't specifically mention COVID-19

    > *" Am stressed and depressed with having to spend so much time at home nowadays."*

    > *" Just worry a lot about getting sick."*

  - The remaining specifically mentioned anxiety, worry, etc.

    > *" I have a real hard time falling asleep because my mind races and I worry but when I finally do the slightest noise awakes me and I can't fall back asleep."*

    > *" The noise in the background along with worrying about things."*

    > *" I've been really stressed with work so it's a bit difficult for me to get sleep at the moment. I am really stressed out; I sometimes don't even sleep on my bed – I sleep on my couch."*

RESPONDENT PROFILE

Gender

- Female 49%
- Male 51%

Education

Less than High School	High School Graduate	Technical or Vocational School	Some College	College Graduate	Postgraduate
2%	21%	6%	20%	29%	22%

Hispanic/Latino

- Yes 13%
- No 87%

Employment

Full Time	Part Time	Unemployed*	Homemaker**	Retired	Student
53%	14%	7%	9%	15%	3%

** Currently unemployed, looking for work
** Homemaker (not currently working outside the home, not looking for work)

Race

- Black/African American 16%
- Asian 4%
- Other* 4%
- White 76%

* Other includes Pacific Islander, American Indian/Alaska Native, Prefer to not answer

Age

18-24	25-34	35-44	45-54	55-64	65+
11%	23%	20%	18%	17%	12%

Marital Status

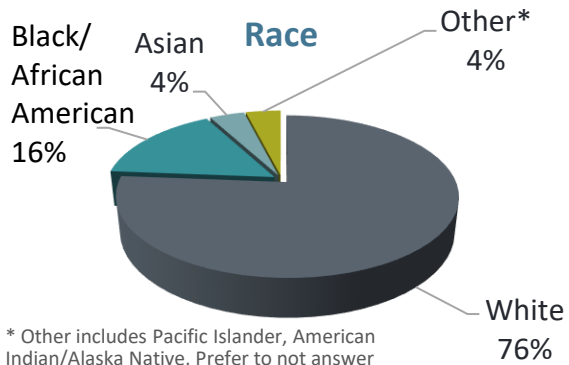| Married	52%
Live Together	11%
Single	26%
Divorced	7%
Separated	1%
Widowed	3%

46% No children living at home

44% Children (<18) living at home

11% Adult children (18+) living at home

7% Other adult (18+) family members living at home