Inside the Mind of Today's Mattress Consumer

Quarterly Tracker: Q1 2021

THE Better
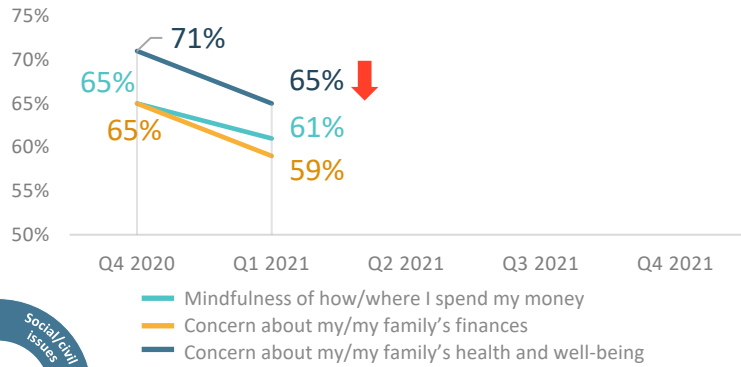Sleep
COUNCIL

marcus**thomas**

The first quarter of 2021 has seen some changes and some consistencies in how people are sleeping, how they're shopping and what they're buying for their homes. For example, this installment of the Better Sleep Council's quarterly tracker found:

- Respondents still say that a good night's sleep is more important than diet, exercise and even relationships when it comes to their health.

- Almost half of respondents still aren't getting a good night's sleep – many of those who are credit their mattress and sleep environment for the quality of their sleep.

- In Q1 2021, mattresses became a lower priority for people's purchases, falling from 5th most important to 8th – although the larger bedroom products category remains a priority for home product purchases.

- While online mattress shopping remains strong, people who are shopping for mattresses are starting to return to in-person shopping as they become more confident about going out to public spaces.

- Slightly more people are shopping locally, while interest in new retailers and new brands fell in the first quarter of the year.

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?

Concern Due to Current Environment

- 71%
- 65% ↓
- 65% → 61%
- 65% → 59%

X-axis: Q4 2020, Q1 2021, Q2 2021, Q3 2021, Q4 2021
Y-axis: 50%, 55%, 60%, 65%, 70%, 75%

Legend:
- 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

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

Current Consumer Concerns	Rank	Q1
Public/personal health	1	
Economy/financial outlook	2	
Social/civil issues	3	
Politics/political climate	4	

Consumer Confidence — Q1

- 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 low, but has gone up since last quarter.

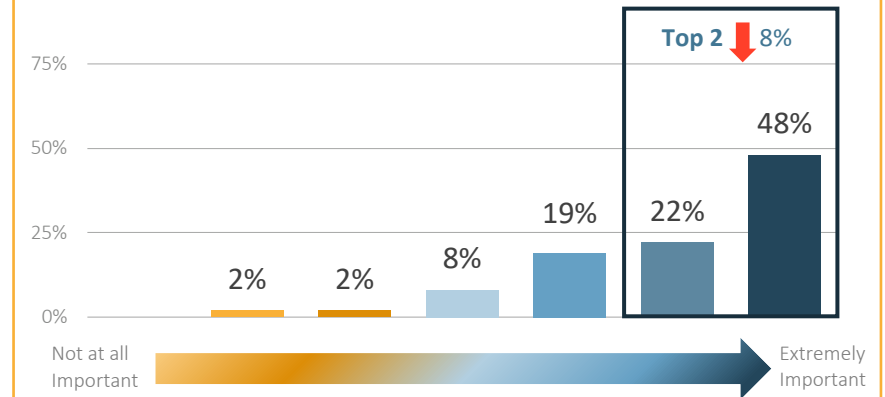> Consumers are still more comfortable shopping and purchasing online than shopping and purchasing in-store.

Important to Make Home Useful and Comfortable — Q1

Top 2 ↓ 8%

- 2%
- 2%
- 8%
- 19%
- 22%
- 48%

Not at all Important → Extremely Important

> Consumers are placing significantly less importance on making their home useful and comfortable than in the previous quarter.

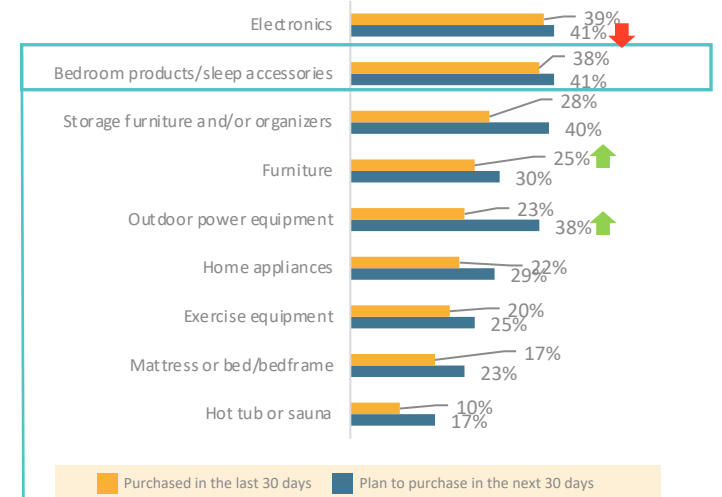Q1 label refers to responses received during the first quarter of 2021.

↓↑ Up and down arrows indicate significance

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How Are People Sleeping?

How Do They Feel About Their Sleep? — Q1

45% are not sleeping well

- Very Poor: 3%
- Poor: 14%
- OK: 28%
- Good: 33%
- Very Good: 22%

Importance of Sleep — Q1

	Rank	Previous Rank	Q1 2021
Good night's sleep	1	1	66%
Relationships with family/friends	2	2	63%
Stress management	3	3	59%
Mental health and self-care	4	5	56%
Regular medical checkups	5	6	54%
Healthy diet	6	4	53%
Balancing work schedule and personal life/obligations	6	6	52%
Physical exercise	7	7	52%

Economy/financial outlook

Public/personal health

Politics/political climate

Social/civil issues

The Current Environment Is Affecting Sleep — Q1

Top 3: 65%

- 6%
- 6%
- 7%
- 15%
- 22%
- 19%
- 24%

Strongly Disagree → Strongly Agree

In Their Own Words — Q1

"Because of my comfortable sheets and mattress."

"I've been taking sleeping pills which help a ton, but I'd be happier if I didn't have to use them."

"The best sleep I get is when I reduce screen time and have a bedtime routine. A new mattress is a godsend."

"I need a new mattress, my bedroom needs cleaned. It stresses me because I don't know where to start."

"Stress, worrying about work and Covid."

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What Are People Buying?

Top Home Purchases* — Q1

	Purchased	Plan to Purchase
Electronics (Moved up from #2 in Q4)	1	1
Bedroom Products	2	1
Storage Furniture/ Organizers	3	2
Mattresses (Moved down from #5 in Q4)	8	7

Purchases for Their Homes — Q1

Category	Purchased in the last 30 days	Plan to purchase in the next 30 days
Electronics	39%	41%
Bedroom products/sleep accessories	38%	41%
Storage furniture and/or organizers	28%	40%
Furniture	25%	30%
Outdoor power equipment	23%	38%
Home appliances	22%	29%
Exercise equipment	20%	25%
Mattress or bed/bedframe	17%	23%
Hot tub or sauna	10%	17%

Purchased in the last 30 days · Plan to purchase in the next 30 days
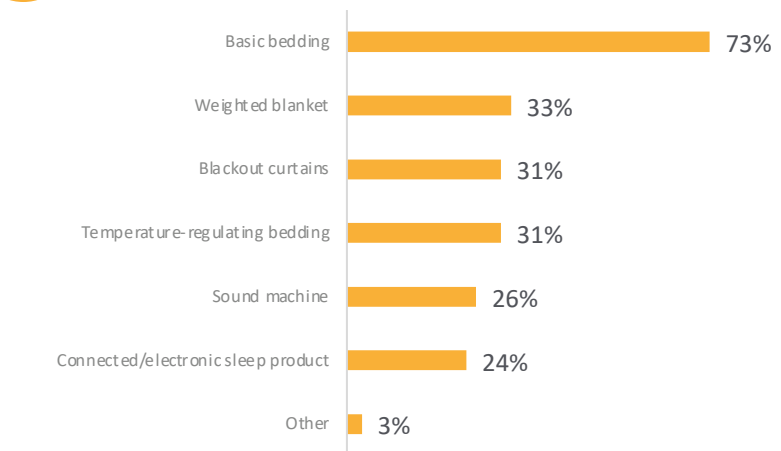
Purchasing Behavior Trends: Online or In-Store

Mattress

	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Online	60%	58%			
In-Store	39%	41%			

Bedroom Products/Sleep Accessories

	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Online	62%	48%			
In-Store	37%	51%			

Online · In-Store

Bedroom Products/Sleep Accessories — Q1

Basic bedding	73%
Weighted blanket	33%
Blackout curtains	31%
Temperature-regulating bedding	31%
Sound machine	26%
Connected/electronic sleep product	24%
Other	3%

Q1 label refers to responses received during the first quarter of 2021.
Inside the Mind of Today's Mattress Consumer – Quarterly Tracker: Q1 2021

*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.

Up and down arrows indicate significance

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How Are People Buying and Shopping for Mattresses?

Online Behaviors

Prefer Purchasing Online
- 67% / 61% (Mattress)
- 59% / 54% (Bedroom Products/Sleep Accessories)

Shopping More Online
- 75% / 73% (Mattress)
- 62% / 59% (Bedroom Products/Sleep Accessories)
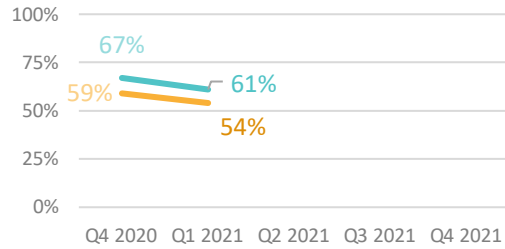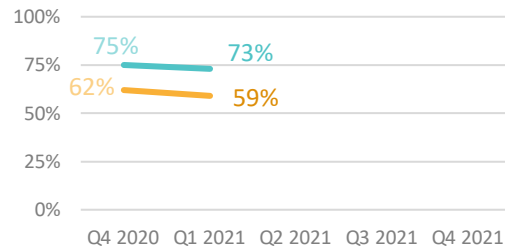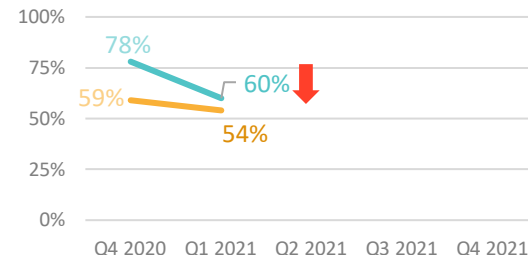
Attitudes Toward Retailers

Purchasing at New Retailers
- 78% / 60% (Mattress)
- 59% / 54% (Bedroom Products/Sleep Accessories)

Shopping at New Retailers
- 70% / 59% (Mattress)
- 46% / 48% (Bedroom Products/Sleep Accessories)

Shopping More Locally
- 63% / 65% (Mattress)
- 48% / 45% (Bedroom Products/Sleep Accessories)
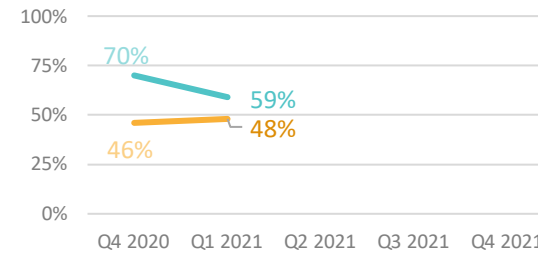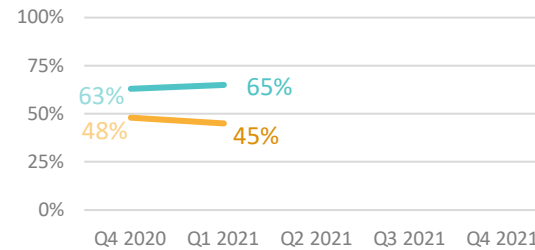
Shopping at COVID-Compliant Retailers
- 72% / 60% (Mattress)
- 62% / 55% (Bedroom Products/Sleep Accessories)
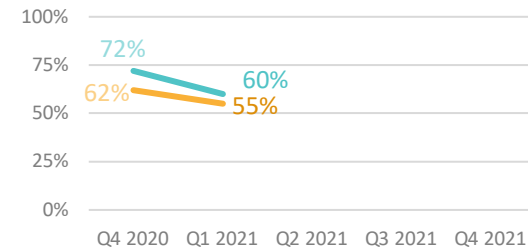
Other Attitudes/Behaviors

Spending More on Home
- 71% / 65% (Mattress)
- 68% / 61% (Bedroom Products/Sleep Accessories)
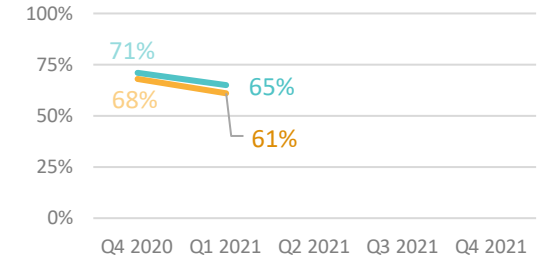
Missing In-Store Shopping Experience
- 67% / 63% (Mattress)
- 48% / 46% (Bedroom Products/Sleep Accessories)
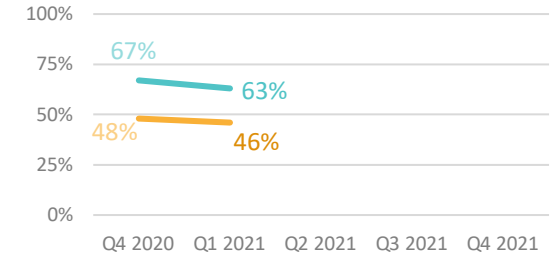
Attitudes Toward Brands

Purchasing New Brands
- 75% / 73% (Mattress)
- 64% / 55% (Bedroom Products/Sleep Accessories)

Shopping for New Brands
- 80% / 69% (Mattress)
- 56% / 54% (Bedroom Products/Sleep Accessories)
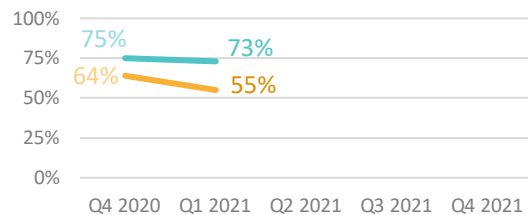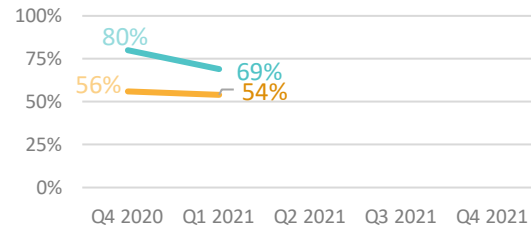
Buying Trusted Brands
- 71% / 70% (Mattress)
- 55% / 50% (Bedroom Products/Sleep Accessories)
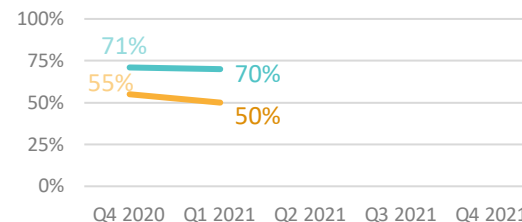
Buying Brands That Align with My Values
- 68% / 66% (Mattress)
- 54% / 47% (Bedroom Products/Sleep Accessories)
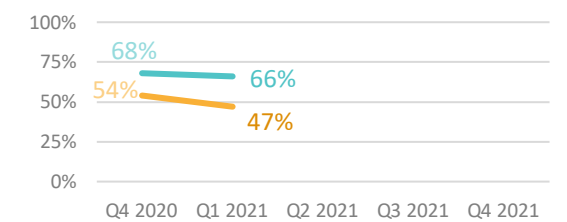
— Mattress   — Bedroom Products/Sleep Accessories*

Appendix

W1 = Q4 2020 wave one
W2 = Q1 2021 wave two

- 500 online surveys were completed March 18-25, 2021, with adults 18 years and older.

  > A sample size of 500 provides a 95% ±4.38% margin of error.

- Screening criteria ensured respondents had purchased at least one home optimization product in the last month.

  > In Q4 2020 (W1), those who *planned* to purchase were included in the sample. In Q1 2021 (W2), those who *only* planned to purchase were eliminated.

- 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.

  > 273 (55%) purchased mattress or bed/bedframe and bedroom products/sleep accessories.

    – 83 respondents had purchased a mattress or bed/bedframe.*

    – 190 purchased bedroom products/sleep accessories.

  > 227 (45%) purchased home optimization products that were *not* a mattress or bed/bedframe or bedroom products/sleep accessories.

- In Q1 2021 (W2), wording was changed for the first question.

  > "Looked at online retailers/websites (e.g., Amazon)" was broken out into "Looked at online-only e-tailers/websites (e.g., Amazon, Overstock.com, eBay, etc.)" and "Looked at retailers' websites."

  > "Looked through miscellaneous books/magazines/pamphlets" was changed to "Reviewed printed literature (e.g., books, magazines) including mailed advertisements."

- In Q1 2021 (W2), Q1A and Q1B were added to the survey.

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?

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.*
  - [If respondent purchased a mattress AND selected "Google searches" in Q1] Q1A. You said that Google searches were part of your shopping experience before your recent mattress purchase. Which of the following best describe how you were using Google searches? Select all that apply.**
  - [If respondent purchased a mattress AND selected "retailers' websites" in Q1] Q1B. You said that looking at retailers' websites was part of your shopping experience before your recent mattress purchase. Which of the following best describe how you were using retailers' websites? 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-Q8 not asked in Q1 2021 (W2).*

- 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.

*Wording changed in Q1 2021 (W2)
**Added in Q1 2021 (W2)

Q13. Have you experienced any of the following in the last 30 days? Select all that apply.

- Similar to Q4 2020 (W1), those who report they are sleeping poorly are more likely to say they have an uncomfortable sleeping environment.

	Total	Reported Sleep Quality*		
		Poor	**OK**	**Good**
		(A)	(B)	(C)
Sample Size	500	84	140	276
Total Mentions	1,414	357	392	665
Body pain/discomfort	45%	74% BC	49% C	34%
TV/electronics (staying up to watch TV, playing games, etc.)	40%	44%	42%	38%
Stress/depression/anxiety	41%	69% BC	43% C	32%
Insomnia	36%	70% BC	34%	27%
Others disturbing your sleep (children, pet, spouse, etc.)	26%	31%	26%	24%
Uncomfortable sleeping environment (bedding, temperature, lighting, etc.)	24%	39% BC	21%	21%
Not enough time to sleep (working, household chores, etc.)	25%	38% C	26%	20%
Uncomfortable mattress	17%	36% BC	14%	13%
Nightmares/night terrors	19%	24%	17%	19%
None of these	9%	0%	8%	13%

* 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?

- Over half (57%) of respondents who report they are sleeping well have purchased a mattress in the last 90 days.

    - Half (50%) of respondents who report they are sleeping OK have purchased a mattress in the last 90 days.

    - Less than one-third (33%) of respondents who report they are sleeping poorly have purchased a mattress in the last 90 days.

- Similar to Q4 2020 (W1), 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.

Purchased a Mattress	All	Reported Sleep Quality*		
		Poor	OK	Good
		(A)	(B)	(C)
Sample Size	500	84	140	276
Purchased in the last 30 days	17%	12%	9%	22% AB
Purchased in the last 31-60 days	18%	7%	21% A	20% A
Purchased in the last 61-90 days	16%	14%	20%	15%
Have not purchased in the last 90 days	49%	67% BC	50%	43%

* 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?

Q1. Which of the following were part of your *shopping* experience before your recent mattress purchase? Select all that apply.

Shopping Experience of Recent Mattress Purchasers
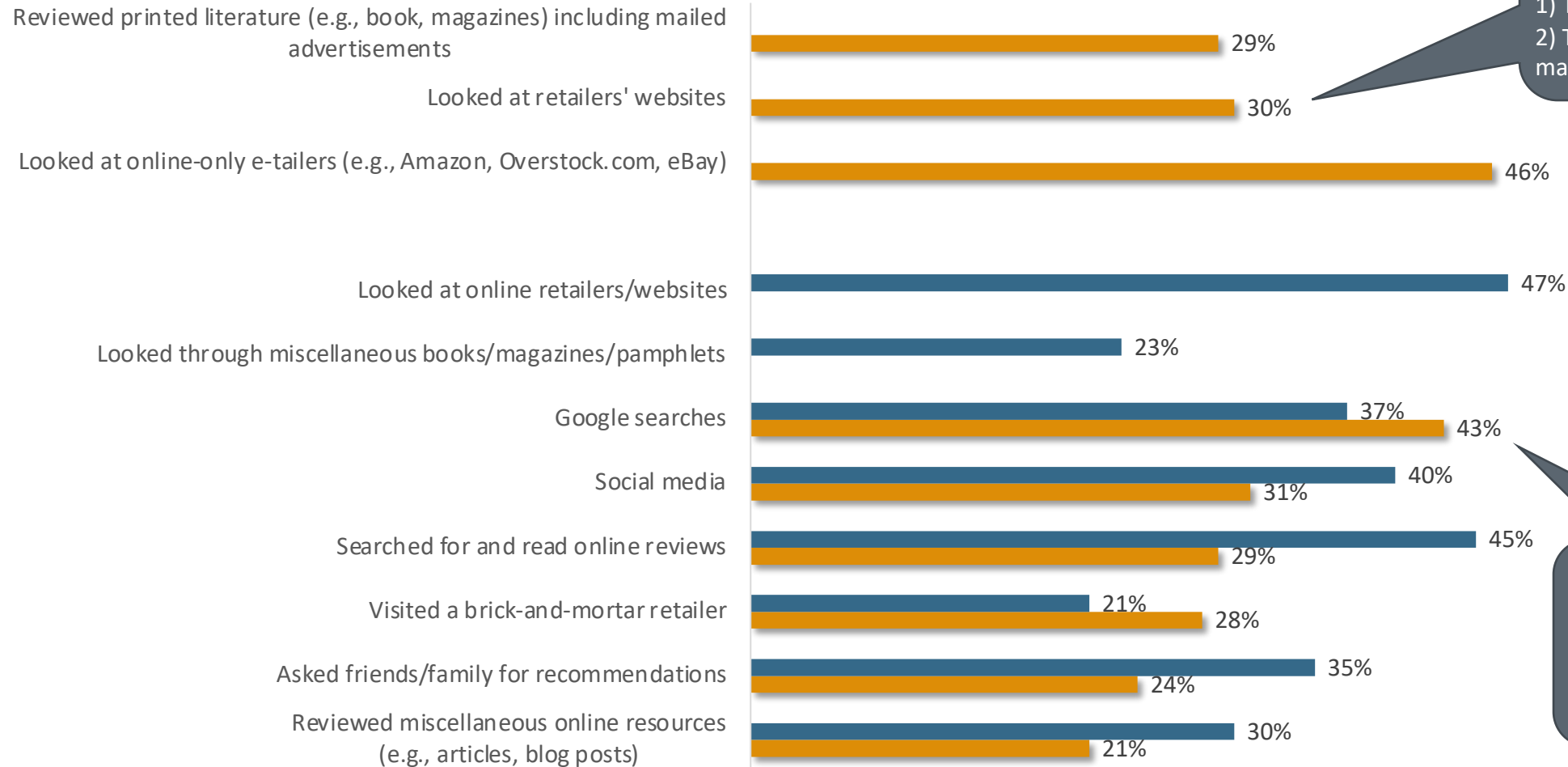
Follow-up question Q1B [added in Q1 2021 (W2)] n=25 *
Top 2 retailers' website uses:
1) To find brands
2) To find information about mattress materials

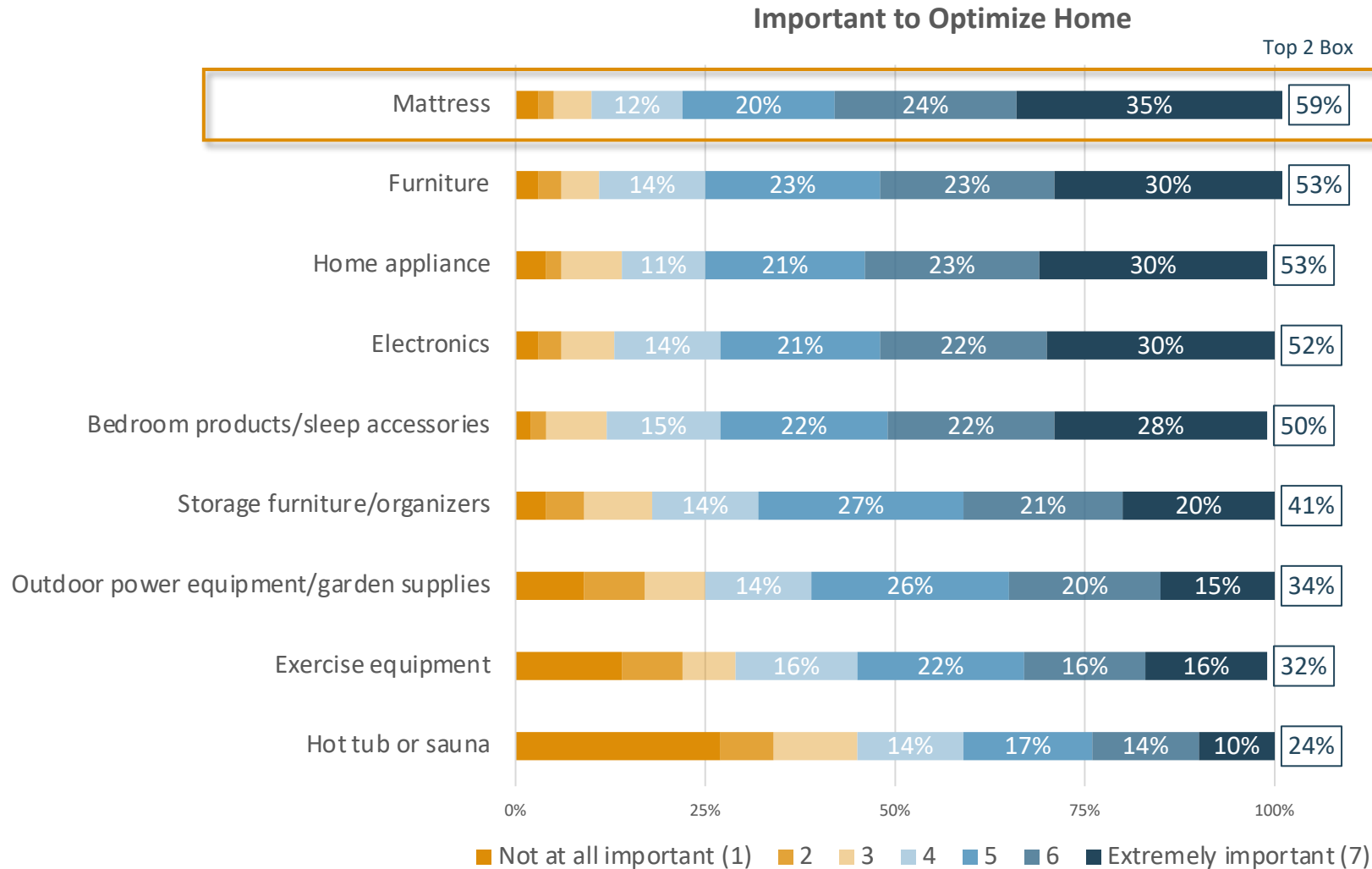| Category	Value
Reviewed printed literature (e.g., book, magazines) including mailed advertisements	29%
Looked at retailers' websites	30%
Looked at online-only e-tailers (e.g., Amazon, Overstock.com, eBay)	46%
Looked at online retailers/websites	47%
Looked through miscellaneous books/magazines/pamphlets	23%
Google searches	37% / 43%
Social media	40% / 31%
Searched for and read online reviews	45% / 29%
Visited a brick-and-mortar retailer	21% / 28%
Asked friends/family for recommendations	35% / 24%
Reviewed miscellaneous online resources (e.g., articles, blog posts)	30% / 21%

■ Wave 1 (n=92)
■ Wave 2 (n=83)

Follow-up question Q1A [added in Q1 2021 (W2)] n=34 *
Top 2 Google search uses:
1) To find information about mattress materials
2) To find brands

4/26/21 Inside the Mind of Today's Mattress Consumer – Quarterly Tracker: Q1 2021 *Warning: extremely small sample size. 12

Important to Optimize Home

Top 2 Box

Category	4	5	6	7	Top 2 Box
Mattress	12%	20%	24%	35%	59%
Furniture	14%	23%	23%	30%	53%
Home appliance	11%	21%	23%	30%	53%
Electronics	14%	21%	22%	30%	52%
Bedroom products/sleep accessories	15%	22%	22%	28%	50%
Storage furniture/organizers	14%	27%	21%	20%	41%
Outdoor power equipment/garden supplies	14%	26%	20%	15%	34%
Exercise equipment	16%	22%	16%	16%	32%
Hot tub or sauna	14%	17%	14%	10%	24%

0% 25% 50% 75% 100%

Legend: ■ Not at all important (1) ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ Extremely important (7)

Mattresses still have the highest importance with respondents when asked about optimizing their homes.
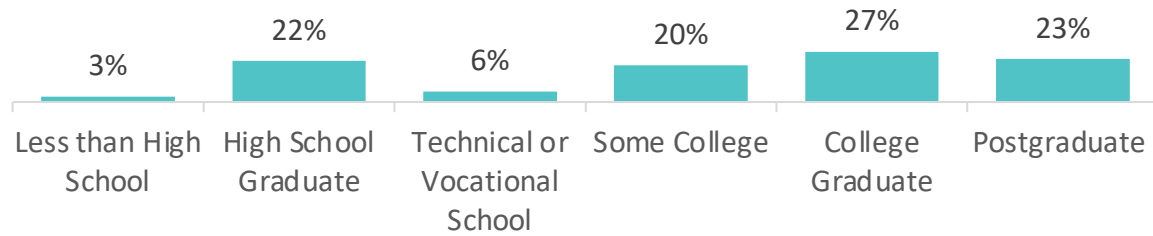
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- The top three themes of why people are not sleeping well …

  - Insomnia (e.g., waking up a lot, trouble falling/staying asleep)
    - *"I just have so much trouble falling asleep and staying asleep."*
    - *"I currently don't sleep well. I suffer from insomnia."*
    - *"Diagnosed insomniac."*

  - Health problems (e.g., pain, sleep apnea)
    - *"My pillows may be causing my neck and back pain the last few weeks."*
    - *"I have problems getting comfortable because of shoulder pain."*
    - *"I have sleep apnea and wake up two or three times a night."*

  - Stress (e.g., anxiety, COVID-19, mind racing)
    - *"Stress, worrying about work and COVID."*
    - *"I cannot shut off my brain sometimes."*
    - *"Stress, kids and anxiety."*

RESPONDENT PROFILE

Gender
Female 51%
Male 49%

Education
- Less than High School: 3%
- High School Graduate: 22%
- Technical or Vocational School: 6%
- Some College: 20%
- College Graduate: 27%
- Postgraduate: 23%

Hispanic/Latino
Yes 14%
No 86%

Employment
- Full Time: 50%
- Part Time: 13%
- Unemployed*: 5%
- Homemaker**: 10%
- Retired: 18%
- Student: 5%

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

Race
- Black/African American: 16%
- Asian: 5%
- Other*: 4%
- White: 75%

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

Age
- 18-24: 14%
- 25-34: 20%
- 35-44: 21%
- 45-54: 15%
- 55-64: 17%
- 65+: 14%

Marital Status
- Married: 52%
- Live Together: 7%
- Single: 26%
- Divorced: 9%
- Separated: 3%
- Widowed: 3%

48% No children living at home

40% Children (< 18) living at home
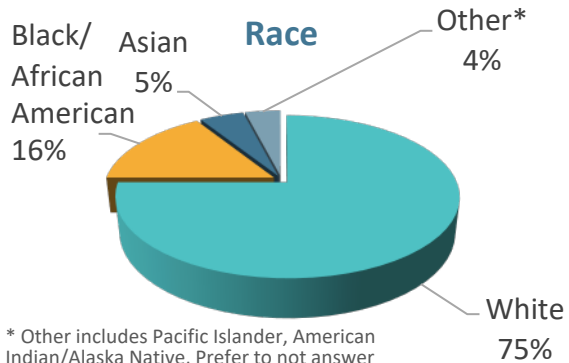
13% Adult children (18+) living at home

8% Other adult (18+) family members living at home