

Inside the Mind of Today's Mattress Consumer

Quarterly Tracker: Q4 2020



REPORT OVERVIEW

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.

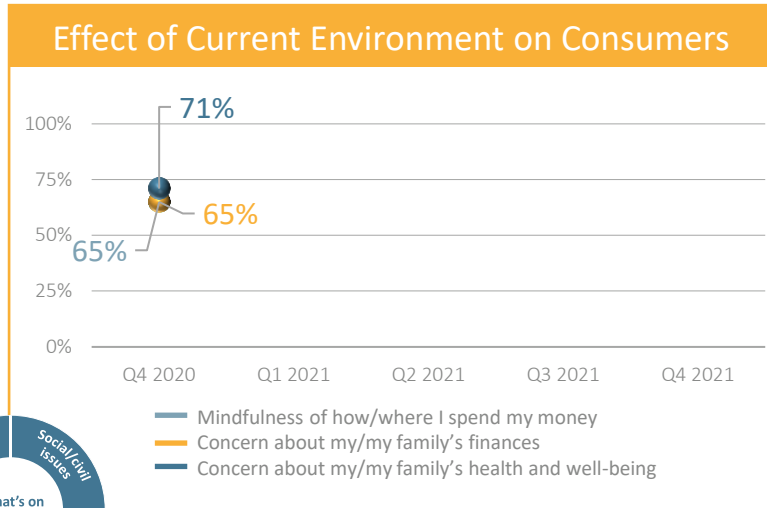
To give the industry insight into shifting consumer attitudes and behaviors in this environment, the Better Sleep Council has set about to conduct a quarterly national survey of mattress buyers. The initial study, conducted in late November, surveyed 500 people, all of whom had purchased a mattress in 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.

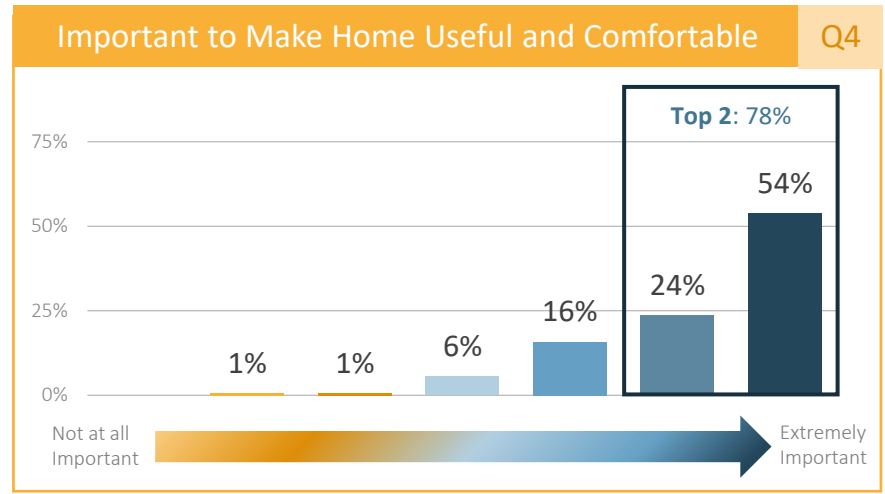
More details about what mattress shoppers are thinking, feeling and doing are captured on the next several slides.

How Are People Feeling About Their Lives?



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

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



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

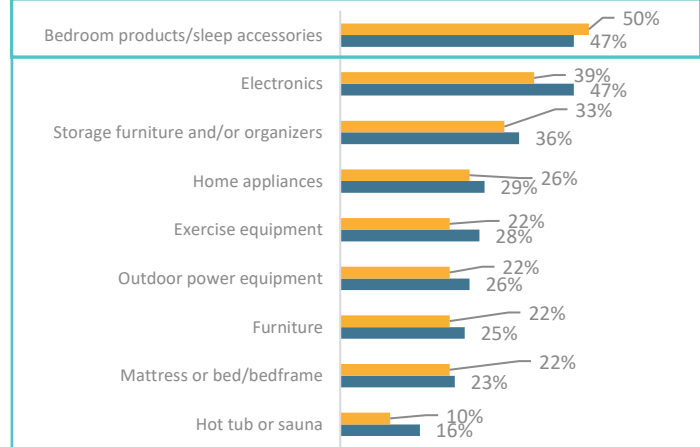
What Are People Buying?

Top Home Purchases* Q4

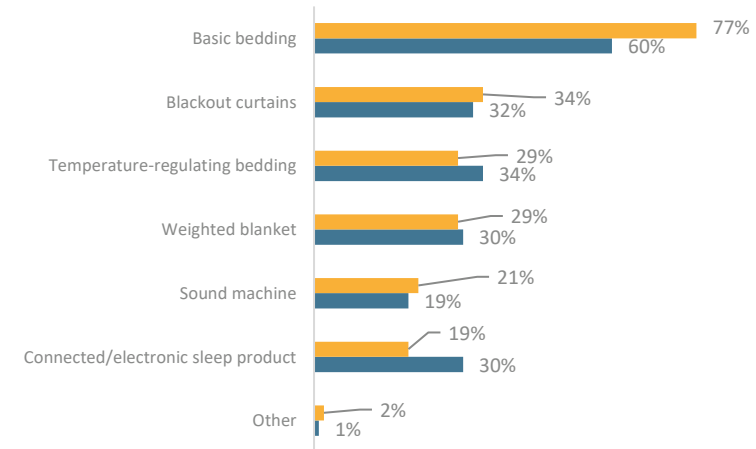
	Purchased	Plan to Purchase
Bedroom Products	1	2
Electronics	2	1
Storage Furniture/Organizers	3	3
Mattresses	5	8



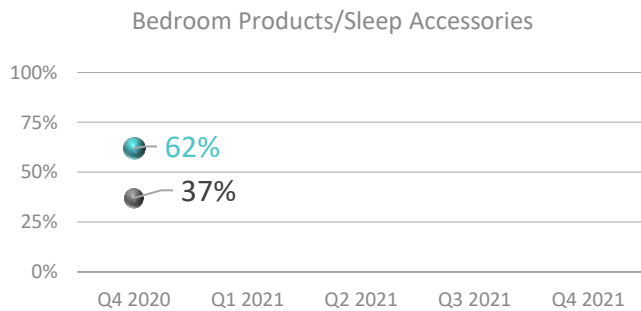
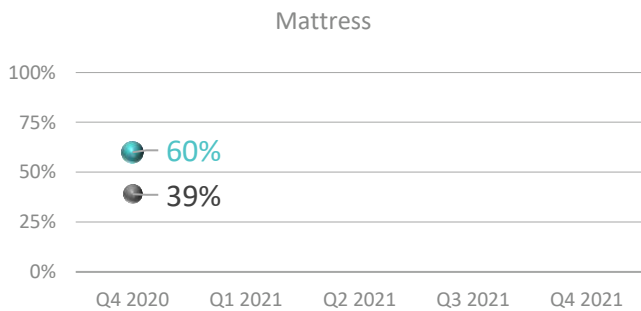
Purchases for Their Homes Q4



Bedroom Products/Sleep Accessories Q4



Purchasing Behavior Trends: Online or In-Store



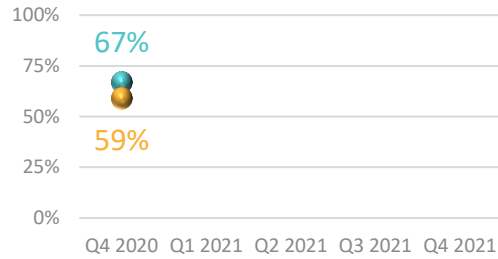
■ Online ■ In-Store

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

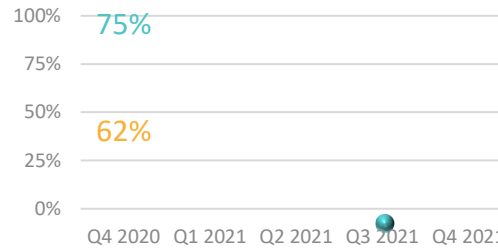
How Are People Buying and Shopping for Mattresses?

Online Behaviors

Prefer Purchasing Online

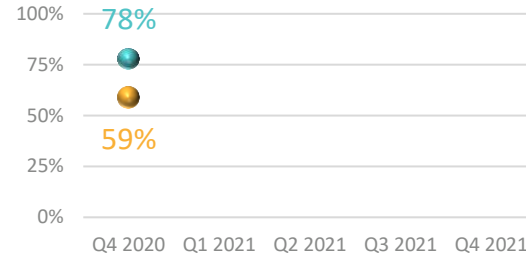


Shopping More Online

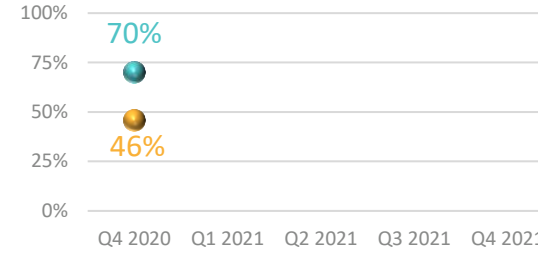


Attitudes Toward Retailers

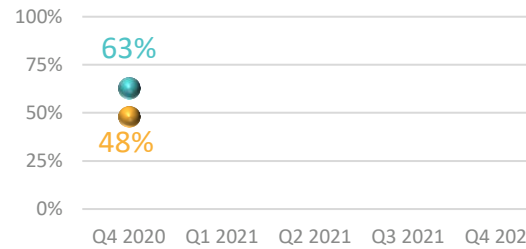
Purchasing at New Retailers



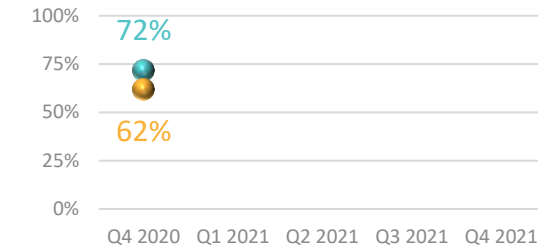
Shopping at New Retailers



Shopping More Locally

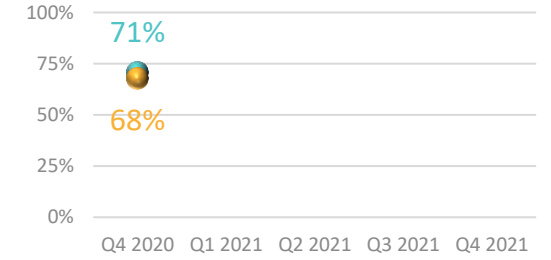


Shopping at COVID-Compliant Retailers

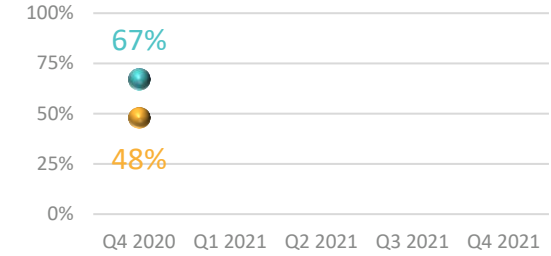


Other Attitudes/Behaviors

Spending More on Home



Missing In-Store Shopping Experience

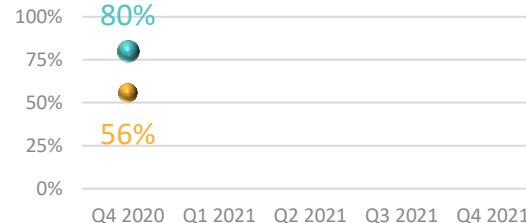


Attitudes Toward Brands

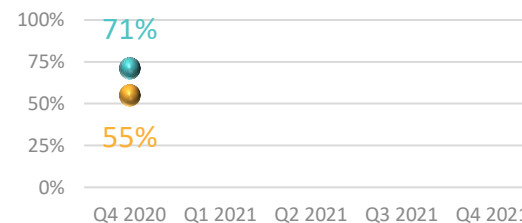
Purchasing New Brands



Shopping for New Brands



Buying Trusted Brands



Buying Brands that Align with My Values



— Mattress — Bedroom Products/Sleep Accessories*

Appendix



Methodology

- 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% \pm 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)

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

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

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

	Total	Reported Sleep Quality*		
		Poor (A)	OK (B)	Good (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?

S1. Have you purchased any of the following? Select all that apply.

- 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

Purchased a Mattress	All	Reported Sleep Quality*		
		Poor (A)	OK (B)	Good (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?

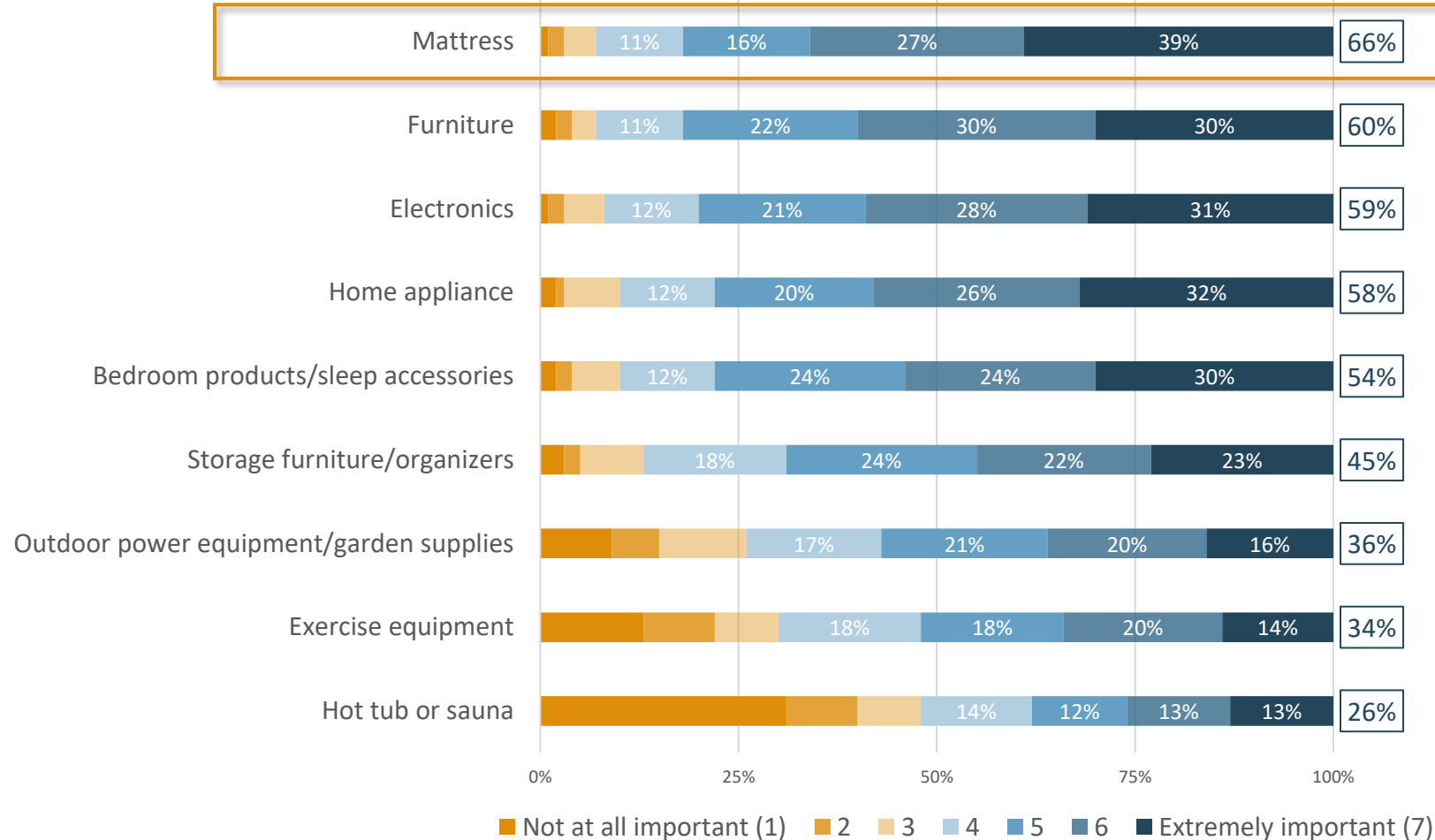
Q1. Which of the following were part of your *shopping* experience before your recent mattress purchase? Select all that apply



Q10. Thinking about making your home more useful and comfortable for your needs, how important to you are the following?

Important to Optimize home

Top 2 Box

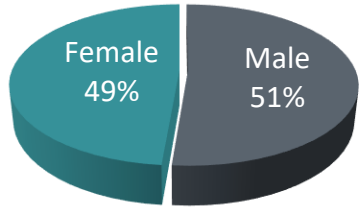


Mattresses have the highest importance with respondents when asked about optimizing their homes.

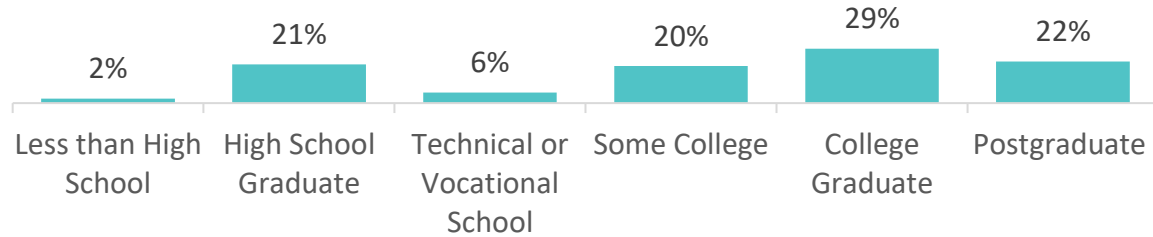
- About 8% specifically mentioned something about stress, worry, anxiety and/or COVID-19
 - Of those, about 13% (n=5) mentioned COVID-19
 - > *“It’s better than in the far past. Stressed due to the COVID-19 situation.”*
 - About 18% (n=7) referred to pandemic but didn’t specifically mention COVID-19
 - > *“ 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



Education



46%
No children living at home



44%
Children (<18) living at home

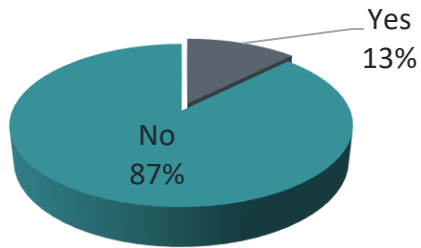


11%
Adult children (18+) living at home

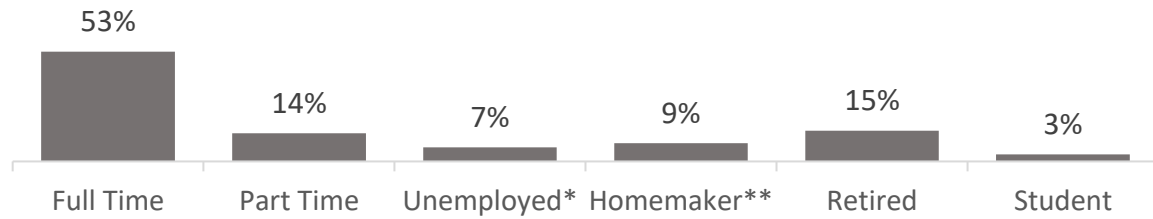


7%
Other adult (18+) family members living at home

Hispanic/Latino



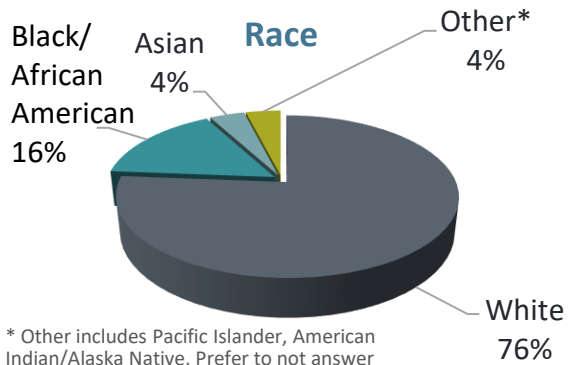
Employment



* Currently unemployed, looking for work

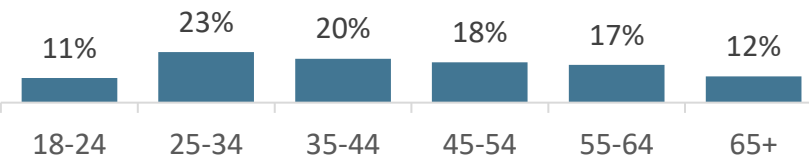
** Homemaker (not currently working outside the home, not looking for work)

Race



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

Age



Marital Status

