

Inside the Mind of Today's Mattress Consumer

Quarterly Tracker: Q2 2021



REPORT OVERVIEW

A lot has changed since the Better Sleep Council launched its Inside the Mind of Today's Mattress Consumer tracking study back in 2020. As COVID-19 concerns and restrictions continue to relax, the Q2 2021 study found that people are showing signs of returning to some pre-pandemic attitudes and behaviors. At the same time, other lockdown behaviors appear to be sticking around for now.

For example, people are more willing to shop and buy in-person, although people say they're still more comfortable shopping online. Interest in buying trusted brands, buying brands that align with the shopper's values, and shopping local have all made a significant comeback for bedroom product consumers. They also are more willing to try new brands and new retailers than they were earlier this year.

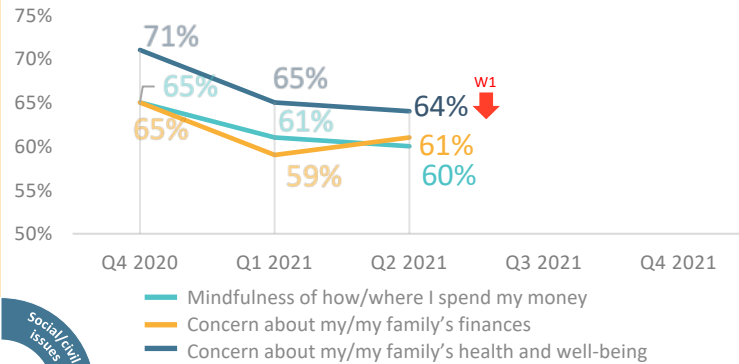
As expected, people's lockdown obsession with optimizing the function and comfort of their homes has leveled off. This may be due to the fact that they are spending less time at home as people return to in-person shopping, school, work, etc.

The easing of concerns and restrictions and the return to some pre-pandemic activities may have also resulted in people starting to sleep better. The number of people who report they are sleeping poorly declined from the previous study, with more people describing their sleep as "good." However, there's still a large minority of people who describe their sleep as "OK" or worse. So, it's not surprising that good sleep remains consumers' number one priority – although for the first time since tracking began, their relationships with other people assumed equal importance. And more people say they are focused on improving their overall sleep environment in this quarter, expanding a trend initially seen earlier.

Although people say they are less anxious or concerned about their families' health and well-being than they were earlier this year, health remains their top priority.

How Are People Feeling About Their Lives?

Concern About Current Environment



Current Consumer Concerns

Rank Q2

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 low, but has gone up since last quarter.

Consumer Confidence

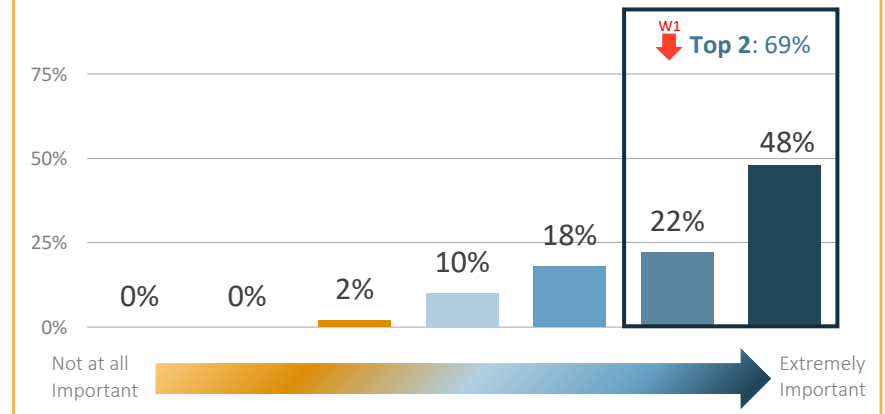
Q2



W1 (Q4 2020) W3 (Q2 2021)

Important to Make Home Useful and Comfortable

Q2

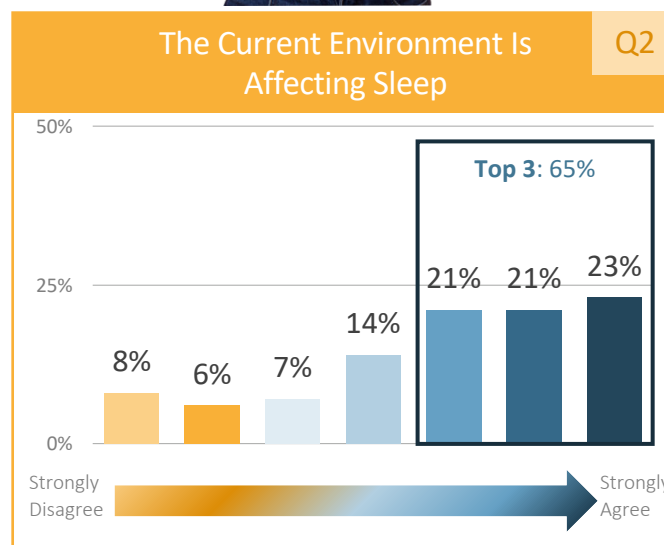
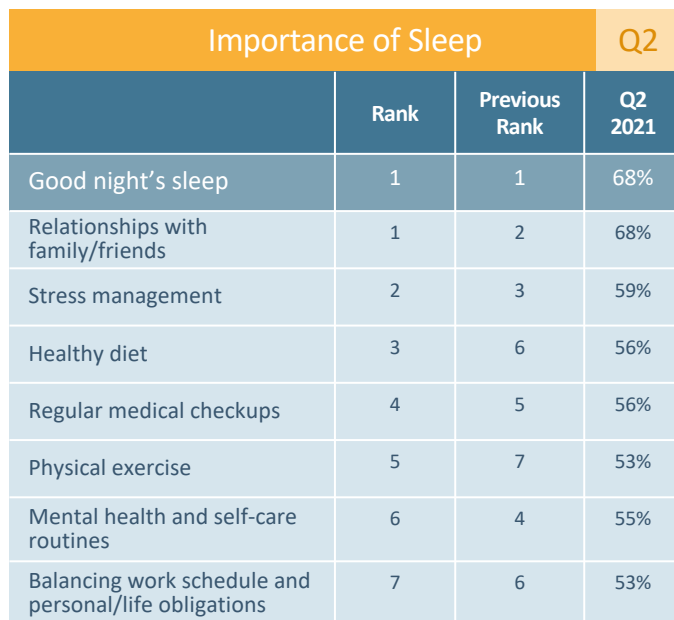


While consumer comfortability with shopping and purchasing in-store has increased, consumers are still slightly more comfortable shopping and purchasing online.

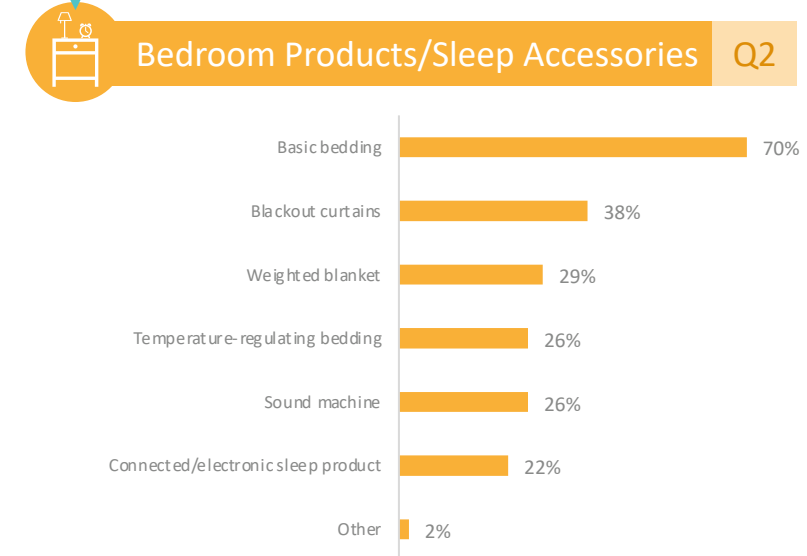
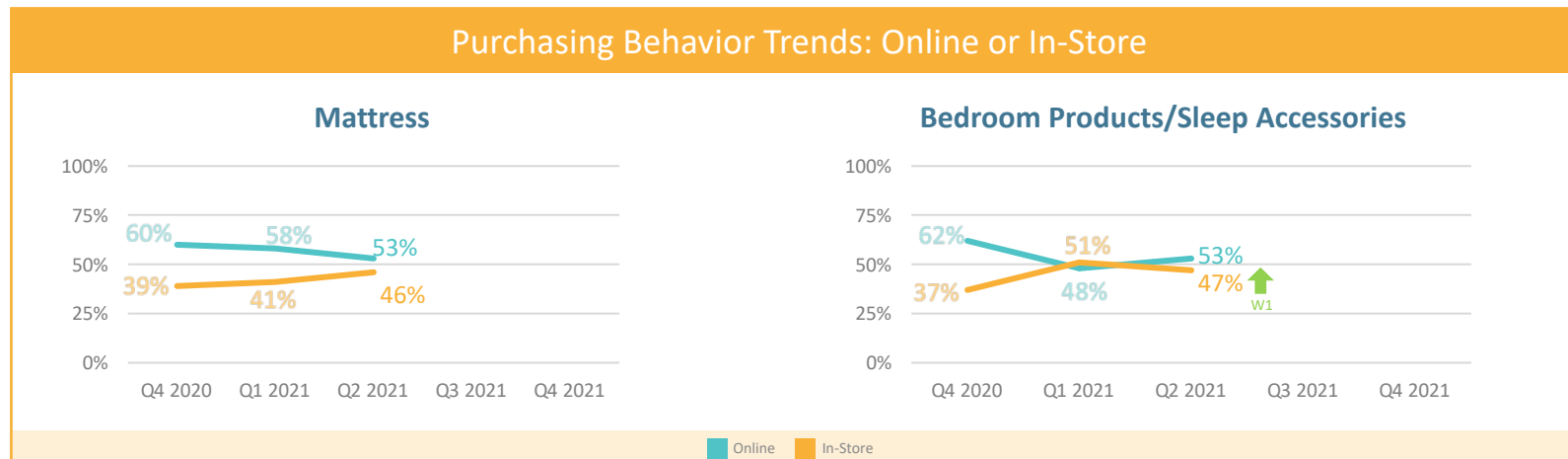
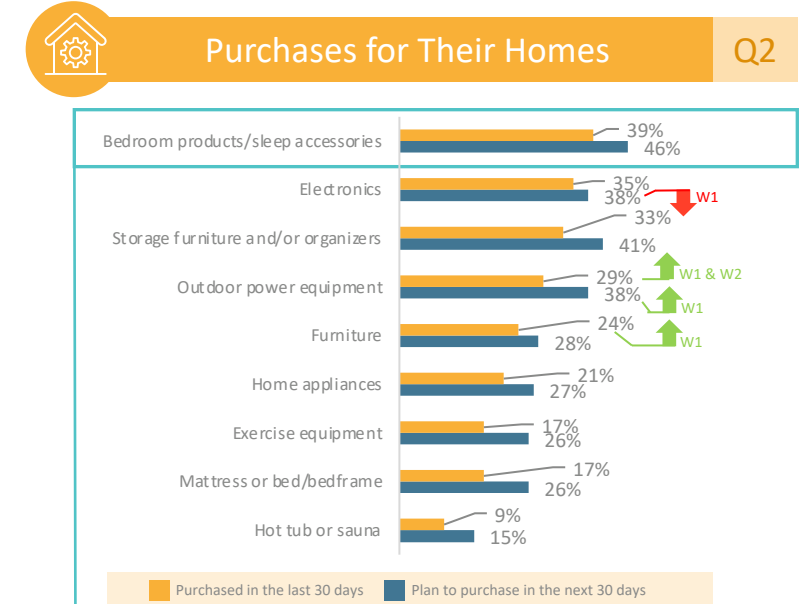
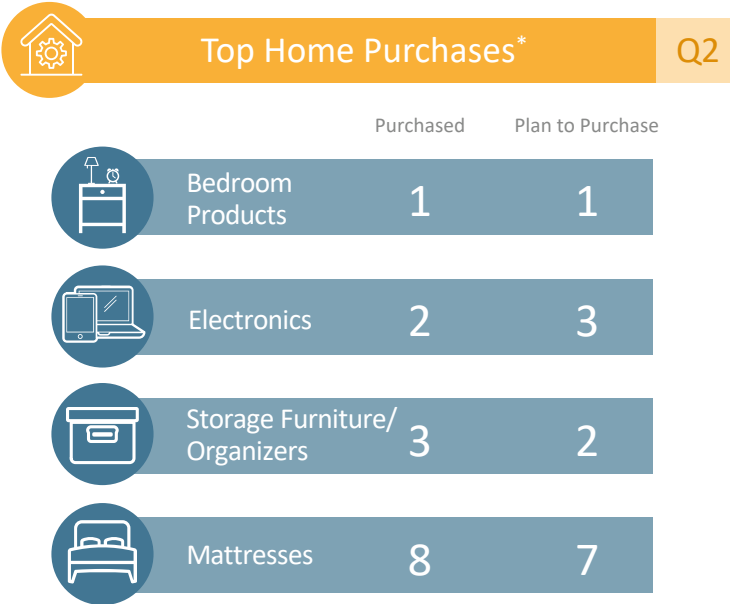


Consumers are placing significantly less importance on making their home useful and comfortable than in the first wave.

"I have a great mattress and very few distractions."



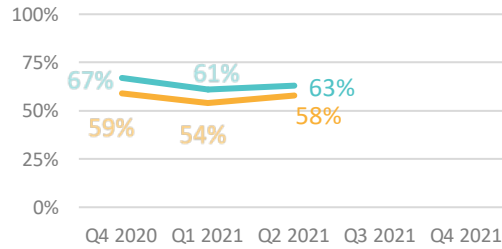
What Are People Buying?



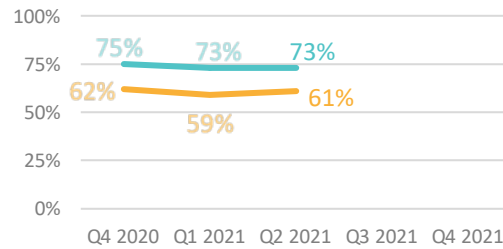
How Are People Buying and Shopping for Mattresses?

Online Behaviors

Prefer Purchasing Online

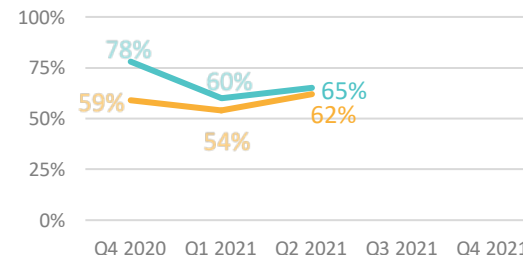


Shopping More Online

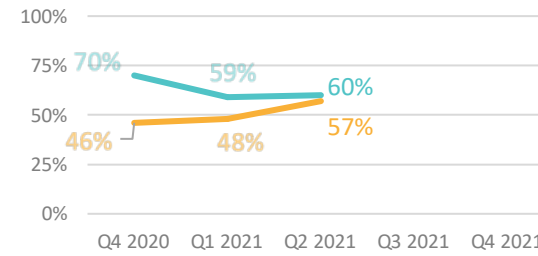


Attitudes Toward Retailers

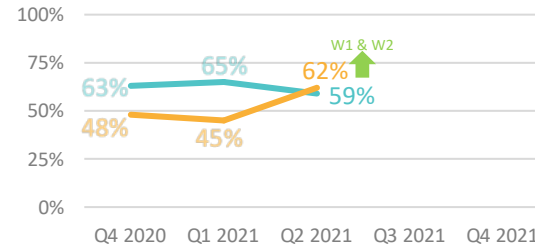
Purchasing at New Retailers



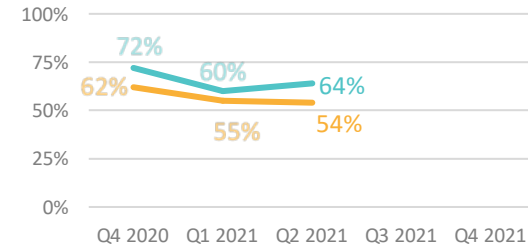
Shopping at New Retailers



Shopping More Locally

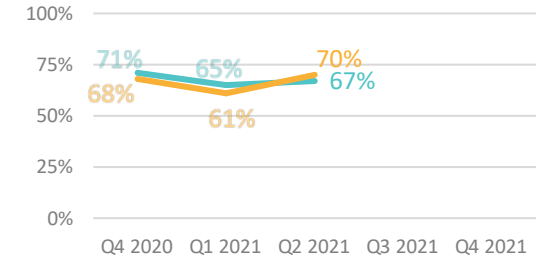


Shopping at COVID-Compliant Retailers

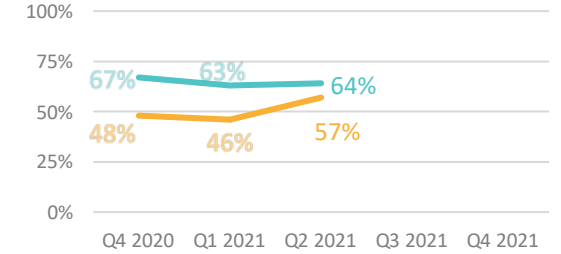


Other Attitudes/Behaviors

Spending More on Home

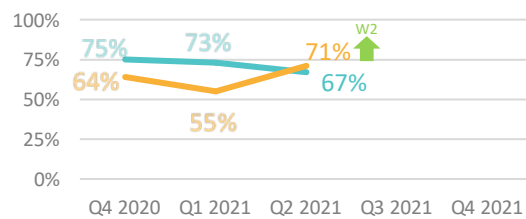


Missing In-Store Shopping Experience

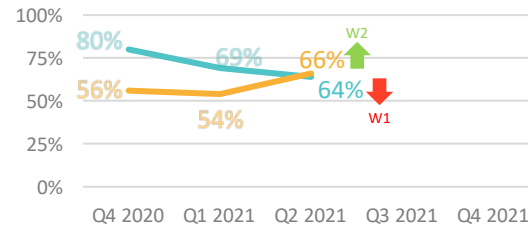


Attitudes Toward Brands

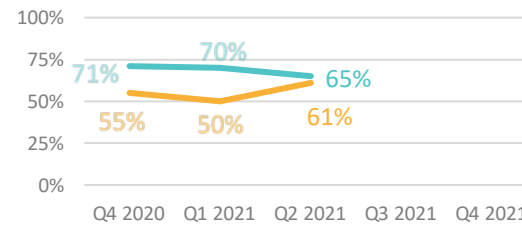
Purchasing New Brands



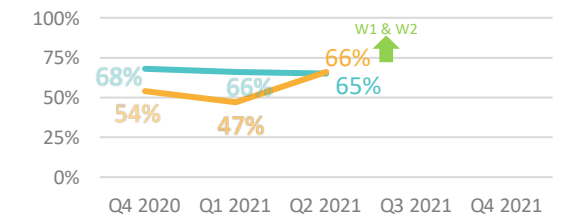
Shopping for New Brands



Buying Trusted Brands



Buying Brands That Align with My Values



— Mattress — Bedroom Products/Sleep Accessories*

Q2 label refers to responses received during the second quarter of 2021.

W1 = Q4 2020 • W2 = Q1 2021 • W3 = Q2 2021

Inside the Mind of Today's Mattress Consumer – Quarterly Tracker: Q2 2021

* Bedroom products/sleep accessories include items like pillows, white noise machines, weighted blankets, etc.

Up and down arrows indicate significance

Appendix

Methodology (Q2 2021)

- 500 online surveys were completed June 1-10, 2021, 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 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) and Q2 2021 (W3), 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.
 - > 277 (55%) purchased mattress or bed/bedframe and bedroom products/sleep accessories.
 - 83 respondents had purchased a mattress or bed/bedframe.*
 - 194 purchased bedroom products/sleep accessories.
 - > 223 (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. This remained for Q2 2021 (W3).
 - > “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. This remained for Q2 2021 (W3).

Survey Questions

SCREENER

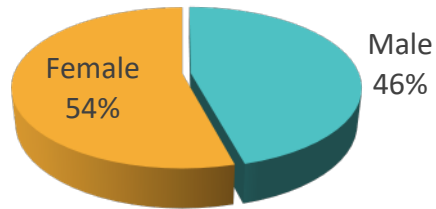
- S1. Have you purchased any of the following? Select all that apply.
- S2. What kind of mattress did you purchase?
- S3. You mentioned that you have purchased bedroom products/sleep accessories (e.g., **not** mattresses; items like pillows, white noise machine, weighted blanket, etc.). What item(s)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

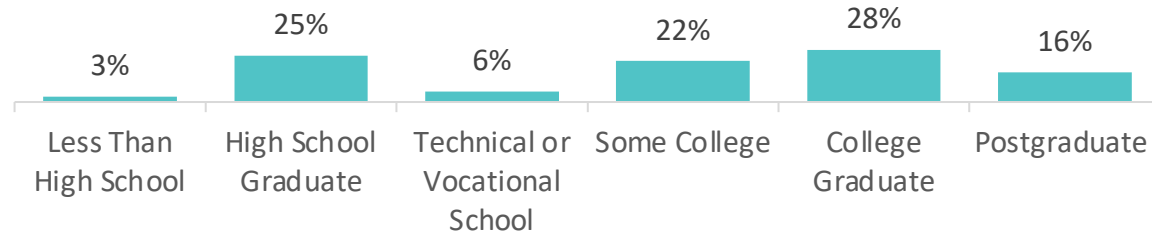
- Q1. Which of the following were part of your *shopping* experience before your recent [PIPE IN S1] purchase? Select all that apply.*
 - [If respondent purchased a mattress AND selected “Google searches” in Q1] Q1A. You said that Google searches were part of your shopping experience before your recent 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.

RESPONDENT PROFILE

Gender



Education



49%

No children living at home



40%

Children (< 18) living at home



13%

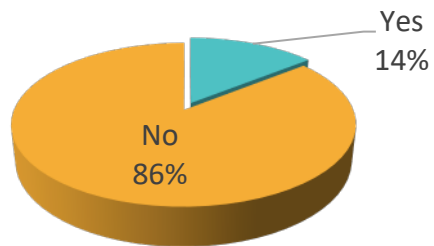
Adult children (18+) living at home



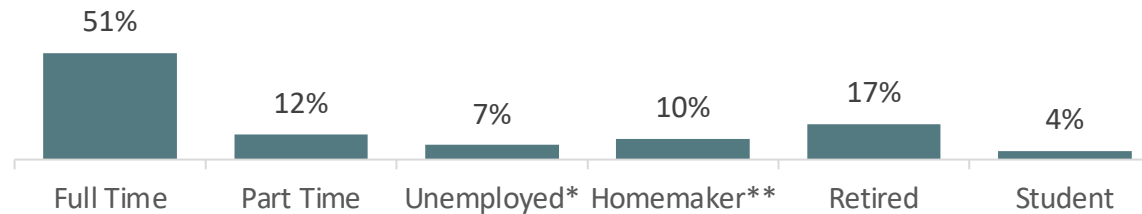
8%

Other adult (18+) family members living at home

Hispanic/Latino



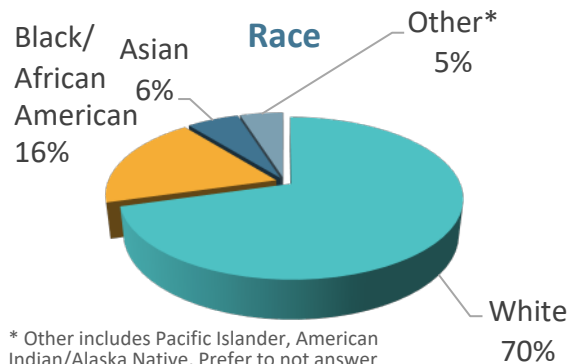
Employment



* Currently unemployed, looking for work

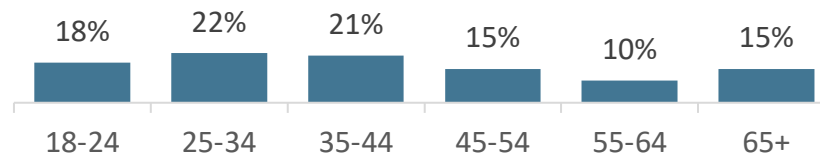
** Homemaker (not currently working outside the home, not looking for work)

Race



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

Age



Marital Status

