

Inside the Mind of Today's Mattress Consumer

**Quarterly Tracker: Q3 2021**



## REPORT OVERVIEW

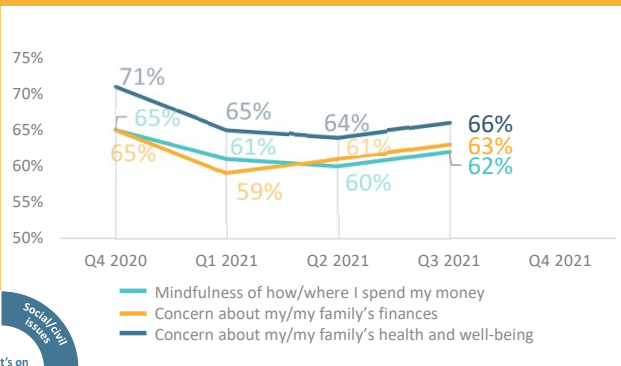
Americans are facing a major COVID-19 resurgence – we’re seeing it in number of cases, in people’s news feeds and in consumers’ concerns and behaviors. According to the Better Sleep Council’s Q3 2021 Consumer Tracker, people are reverting back toward some attitudes and behaviors exhibited earlier in the pandemic. This comes after seeing some relaxation of COVID-19 concerns and shopping behaviors earlier in 2021. In these third-quarter results, consumers are showing resurgent concerns about COVID-19 and the overall environment they live in. Confidence in travel and in brick-and-mortar shopping and purchasing has declined in this quarter, as opposed to the previous quarter, and preference for online shopping and purchasing remains strong.

Not surprisingly then, many people – almost two-thirds of those surveyed, said the current environment is affecting their sleep. Interestingly, more people are reporting their sleep as “good” and “very good” – perhaps reflecting the impact of strong mattress purchasing over the past 18 months and the fact that sleep remains their most important health priority.

People are cocooning again, spending much more attention and dollars on optimizing their homes for work, education and living. Bedroom product/sleep accessories purchases are still No. 1 actual and planned purchases, and purchase intent for mattresses rose slightly. This suggests demand will continue. Brick-and-mortar purchase of mattresses surpassed online purchases for the first time since the BSC tracker began monitoring people’s shopping behaviors in 2020. All of this suggests that sleep will remain a high priority for consumers, and that demand for mattresses is unlikely to dip significantly. It also suggests retailers and manufacturers with effective digital and eCommerce programs will compete more effectively than others.

# How Are People Feeling About Their Lives?

## Concern About Current Environment



## Current Consumer Concerns

Rank Q3

Concern	Rank	Q3
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, and has gone down this quarter as opposed to the previous.

## Consumer Confidence

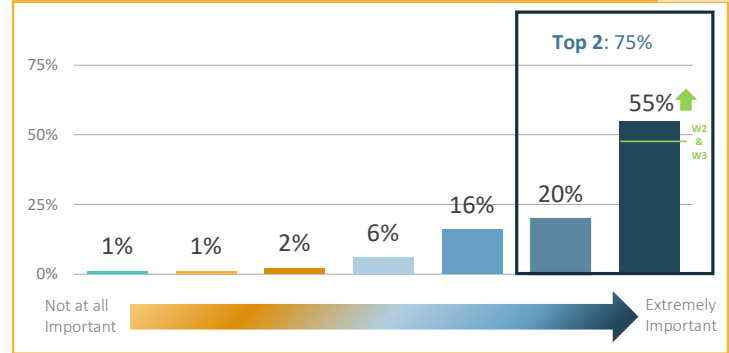
Q3



W1 (Q4 2020) W4 (Q3 2021)

## Important to Make Home Useful and Comfortable

Q3



Consumer comfort with shopping and purchasing in-store has decreased since last quarter, and consumers are still slightly more comfortable shopping and purchasing online.



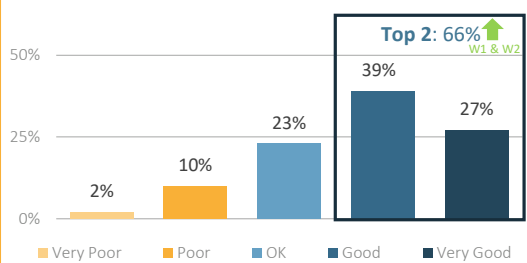
Consumers are placing significantly more importance on making their home useful and comfortable than in the previous two waves.

# How Are People Sleeping?

"My bed and mattress are very comfortable. I get a great night of sleep mostly because of my bed."

"Having the right accessories really helps – cooling pillow, sound spa, good mattress, etc."

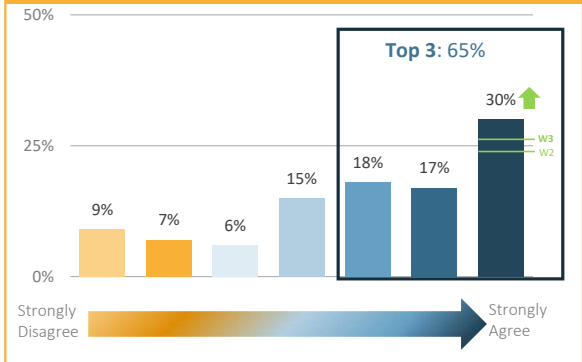
## How Do They Feel About Their Sleep? Q3



## Importance of Sleep Q3

	Rank	Previous Rank	Q3 2021
Good night's sleep	1	1	70%
Relationships with family/friends	2	1	67%
Stress management	3	2	66%
Mental health and self-care routines	4	6	64%
Healthy diet	5	3	59%
Physical exercise	6	5	59%
Regular medical checkups	7	4	60%
Balancing work schedule and personal/life obligations	8	7	58%

## The Current Environment Is Affecting Sleep Q3



## In Their Own Words Q3



"It's hot most nights, and the mattress makes my back hurt more than it already did."

"I generally get at least 8 hours of sleep every night. I purchased a new mattress last year and I sleep like a baby on it."

"I have problems with my back. I need a good mattress."



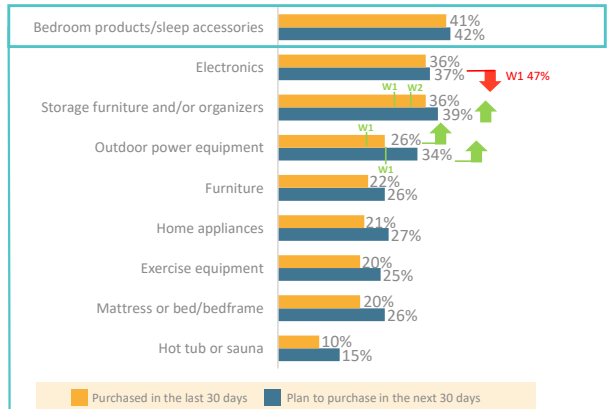
# What Are People Buying?

## Top Home Purchases\* Q3

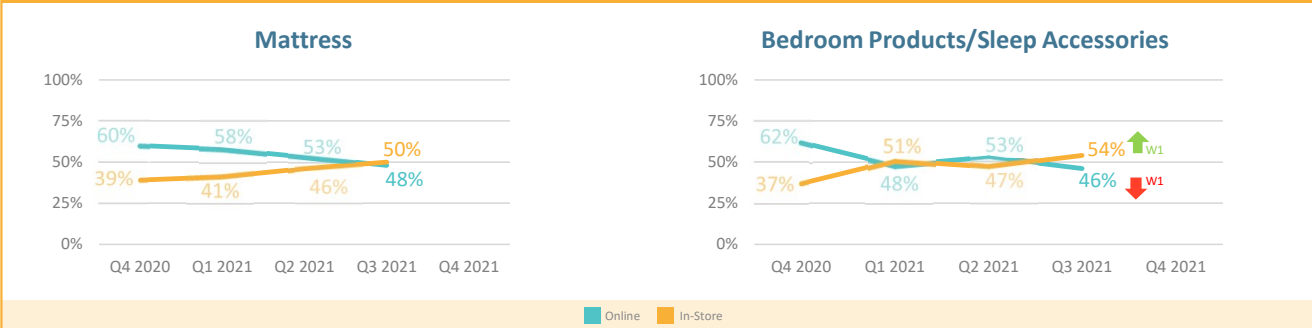
	Purchased	Plan to Purchase
Bedroom Products	1	1
Electronics	2	3
Storage Furniture/Organizers	2	2
Mattresses	8	6



## Purchases for Their Homes Q3



## Purchasing Behavior Trends: Online or In-Store

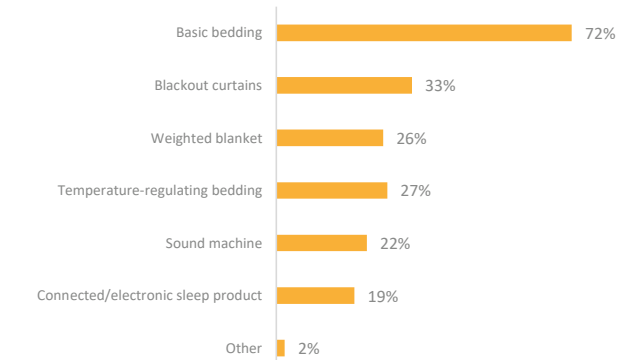


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\*A home optimization purchase encompasses one of the following products: mattress and/or bed/bedframe, furniture, home appliance, electronics, bedroom products/sleep accessories, exercise equipment, outdoor power equipment and/or garden supplies,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

## Bedroom Products/Sleep Accessories Q3

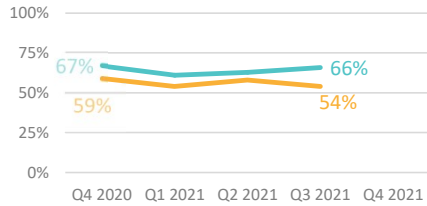


Up and down arrows indicate significance

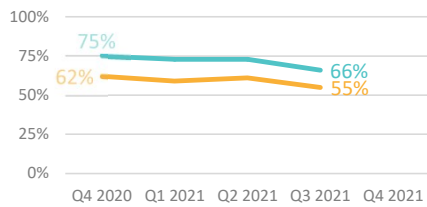
# How Are People Buying and Shopping for Mattresses?

## Online Behaviors

### Prefer Purchasing Online

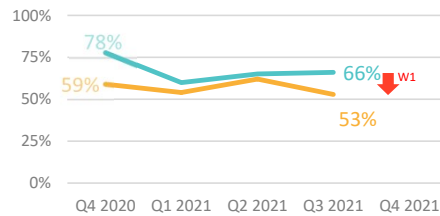


### Shopping More Online than In-Store

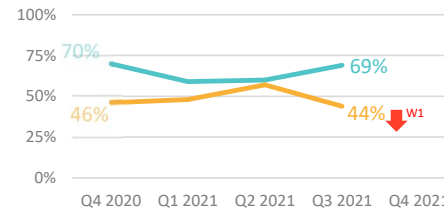


## Attitudes Toward Retailers

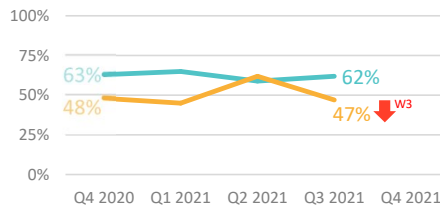
### Purchasing at New Retailers



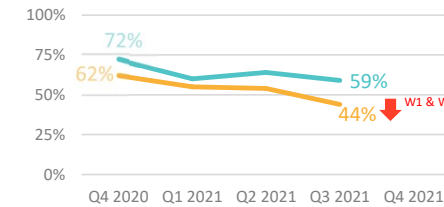
### Shopping at New Retailers



### Shopping More Locally

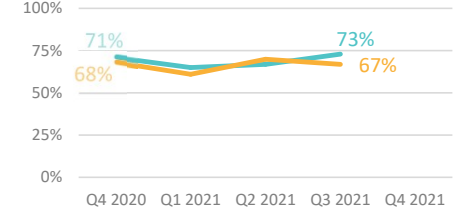


### Shopping at COVID-Compliant Retailers

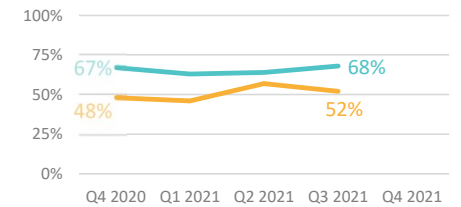


## Other Attitudes/Behaviors

### Spending More on Home

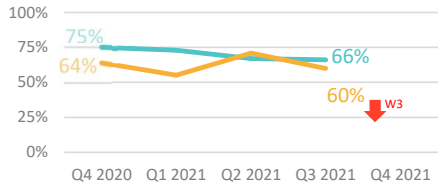


### Missing In-Store Shopping Experience

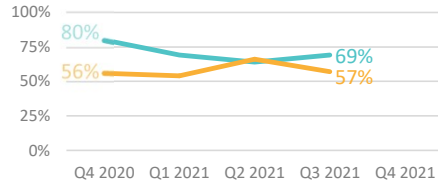


## Attitudes Toward Brands

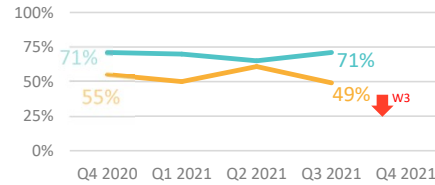
### Purchasing New Brands



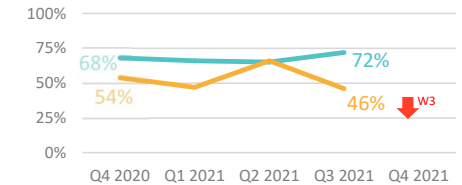
### Shopping for New Brands



### Buying Trusted Brands



### Buying Brands That Align with My Values



— Mattress — Bedroom Products/Sleep Accessories\*

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

Up and down arrows indicate significance

# Appendix

## Methodology (Q3 2021)

- 600 online surveys were completed September 1-11, 2021, with adults 18 years and older.
  - > A sample size of 600 provides a 95%  $\pm 4.001\%$  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), Q2 2021 (W3) and Q3 2021 (W4), 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.
  - > 367 (61%) purchased a mattress or bed/bedframe and bedroom products/sleep accessories.
    - 119 respondents had purchased a mattress or bed/bedframe.\*
    - 248 purchased bedroom products/sleep accessories.
  - > 233 (39%) 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 Q3 2021 (W4).
  - > “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 Q3 2021 (W4).



## Survey Questions

### SCREENER

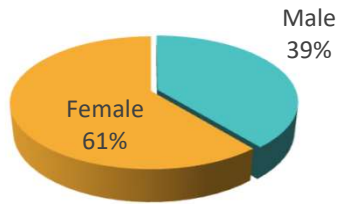
- S1. Have you purchased any of the following? Select all that apply.
- S2. What kind of mattress did you purchase?
- S3. You mentioned that you have purchased bedroom products/sleep accessories (e.g., **not** mattresses; items like pillows, white noise machine, weighted blanket, etc.). What item(s)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

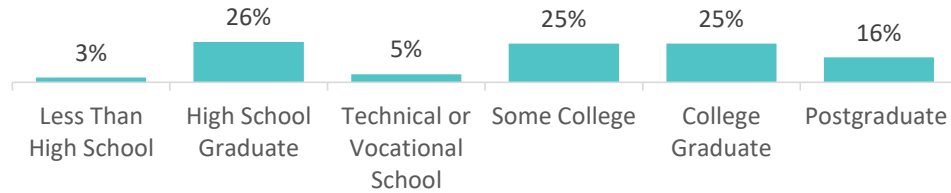
- Q1. Which of the following were part of your *shopping* experience before your recent [PIPE IN S1] purchase? Select all that apply.\*
  - [If respondent purchased a mattress AND selected “Google searches” in Q1] Q1A. You said that Google searches were part of your shopping experience before your recent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



**41%**  
Children (< 18) living at home

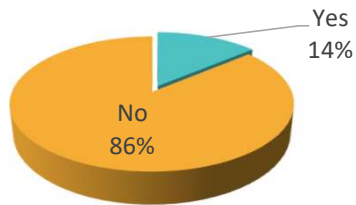


**12%**  
Adult children (18+) living at home

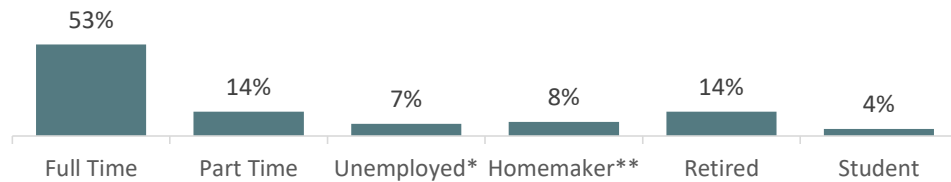


**7%**  
Other adult (18+) family members living at home

## Hispanic/Latino



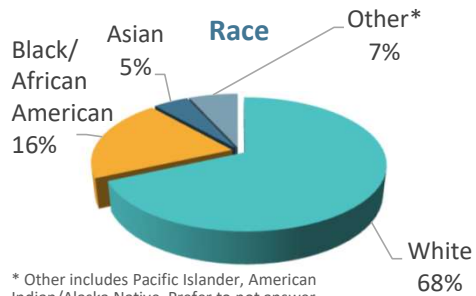
## Employment



\* Currently unemployed, looking for work

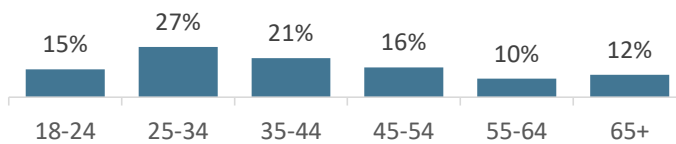
\*\* Homemaker (not currently working outside the home, not looking for work)

## Race

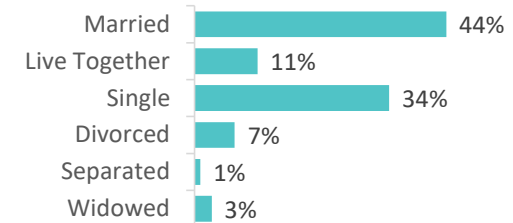


\* Other includes Pacific Islander, American Indian/Alaska Native, Prefer to not answer

## Age



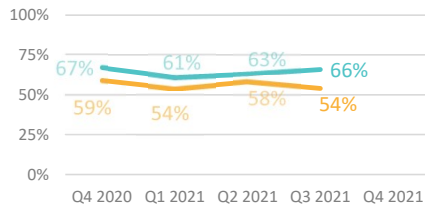
## Marital Status



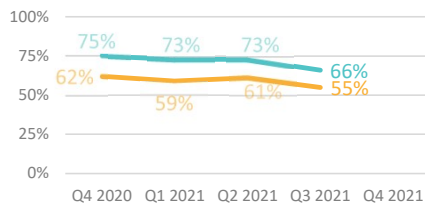
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## Online Behaviors

### Prefer Purchasing Online

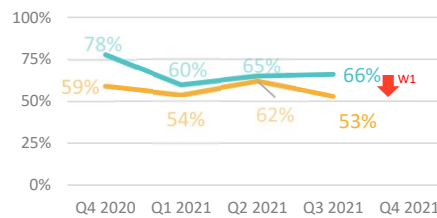


### Shopping More Online than In-Store

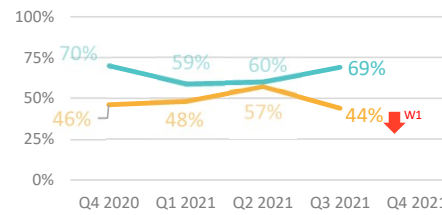


## Attitudes Toward Retailers

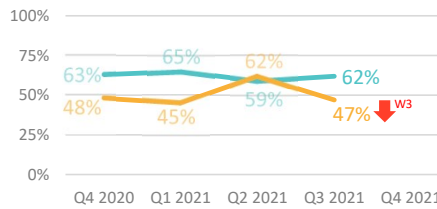
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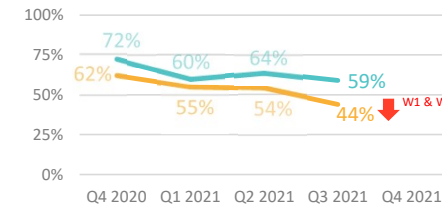
### Shopping at New Retailers



### Shopping More Locally

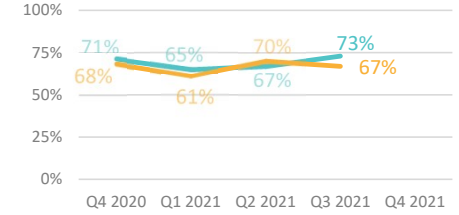


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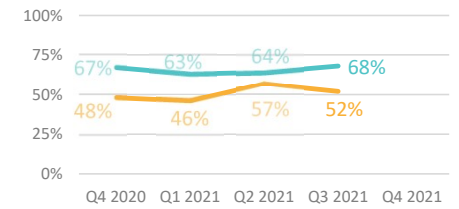


## Other Attitudes/Behaviors

### Spending More on Home

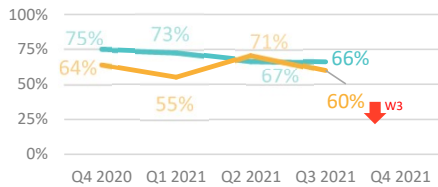


### Missing In-Store Shopping Experience

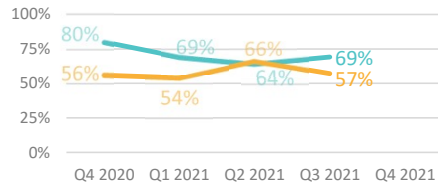


## Attitudes Toward Brands

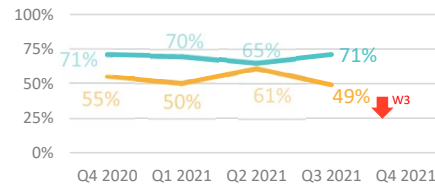
### Purchasing New Brands



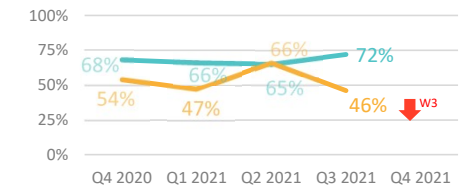
### Shopping for New Brands



### Buying Trusted Brands



### Buying Brands That Align with My Values



— Mattress — Bedroom Products/Sleep Accessories\*

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