

Inside the Mind of Today's Mattress Consumer

Quarterly Tracker: Q4 2021



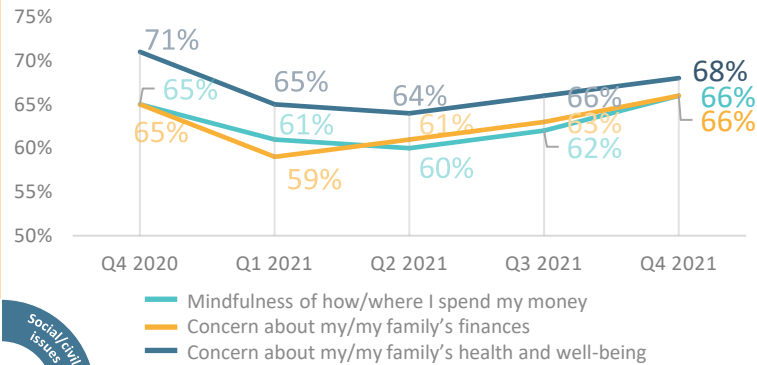
REPORT OVERVIEW

A new wave of the coronavirus seems to be creating major ripples in people's lives – affecting their concerns, behaviors and shopping habits, according to the Q4 2021 “Inside the Mind of Today's Mattress Consumer” survey by the Better Sleep Council. The research suggests that people are partially retreating into their homes – increasing their prioritization of optimizing them for comfort and efficiency. The study found that mattress purchase intent, specifically, is also rising as people continue to make getting a good night's sleep their number one health and wellness priority.

Preference for shopping and buying mattresses online rose in the fourth quarter, edging ahead of in-person mattress shopping, compared with the previous quarter. Despite recent increases in people's overall concerns and preferences for not going out, consumers remain significantly more confident about going to the doctor, shopping/purchasing in-store, and traveling/patronizing a public establishment than they were a year ago at this time.

How Are People Feeling About Their Lives?

Concern About Current Environment



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 low, but has gone up since last quarter.

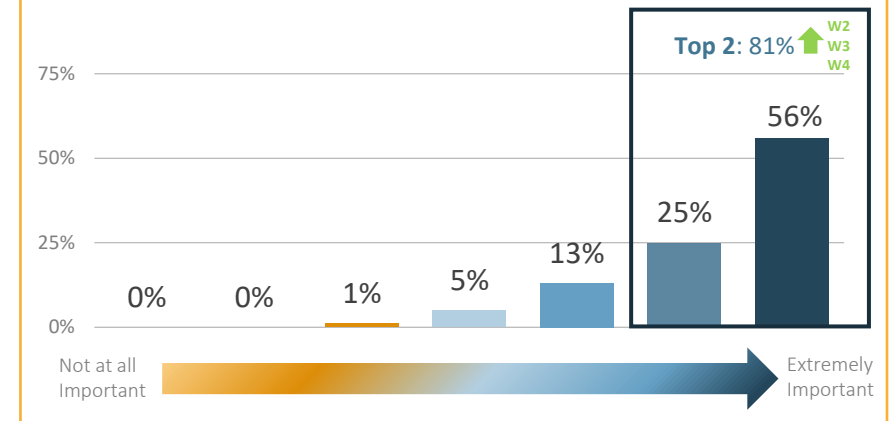
Consumer Confidence

Q4



Important to Make Home Useful and Comfortable

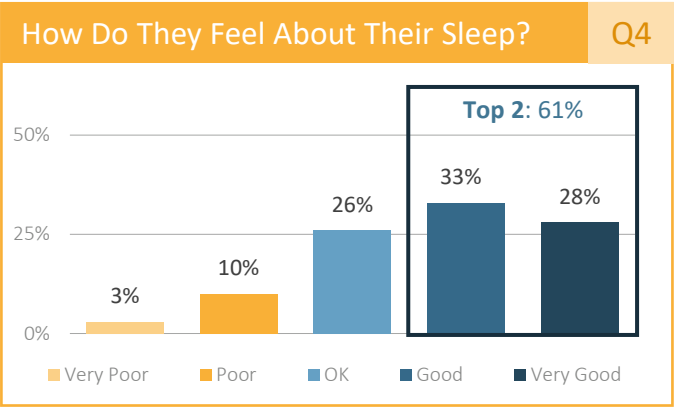
Q4



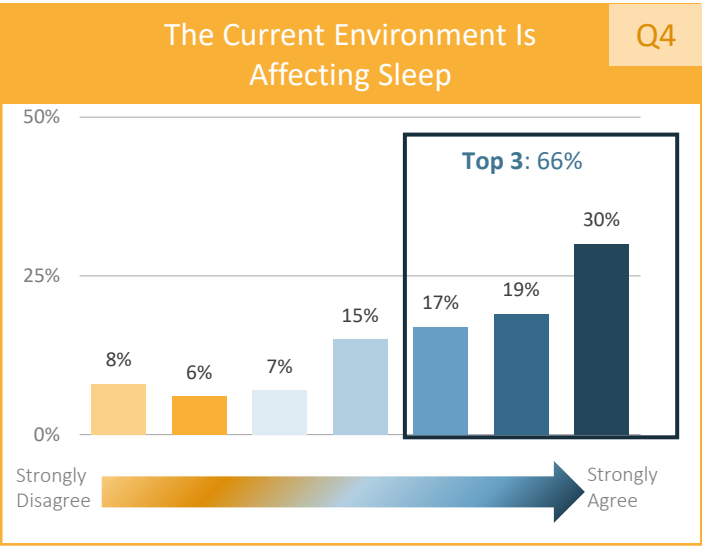
Consumer comfort with shopping and purchasing in-store has increased since last quarter, but consumers are still slightly more comfortable shopping and purchasing online.

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

How Are People Sleeping?



Importance of Sleep			Q4
	Rank	Previous Rank	Q4 2021
Good night's sleep	1	1	76%
Relationships with family/friends	2	2	73%
Stress management	3	3	68%
Regular medical checkups	4	7	66%
Mental health and self-care routines	5	4	63%
Balancing work schedule and personal/life obligations	5	8	63%
Healthy diet	6	5	60%
Physical exercise	6	6	60%



“Sleep better since changing our mattress.”

“My sleep is good only because I got a good mattress that helps my back and pains.”

“It takes at least four hours for me to go to sleep. It’s just hard for me to get comfortable in bed due to my mattress.”





“We have a comfortable bed, and we sleep in a quiet situation. The temperature is cool, so we are buying an electric blanket. The sleep is good.”

“Racing thoughts and uncomfortable mattress.”



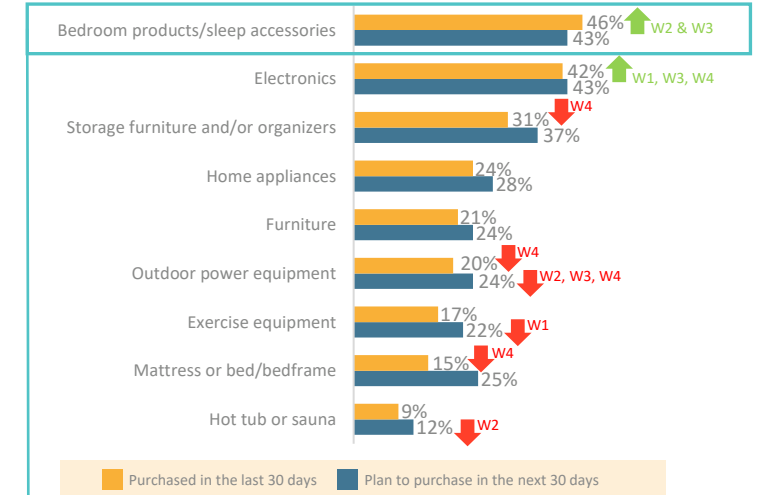
What Are People Buying?

Top Home Purchases* Q4

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

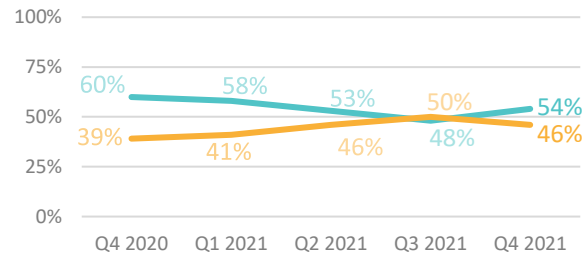


Purchases for Their Homes Q4

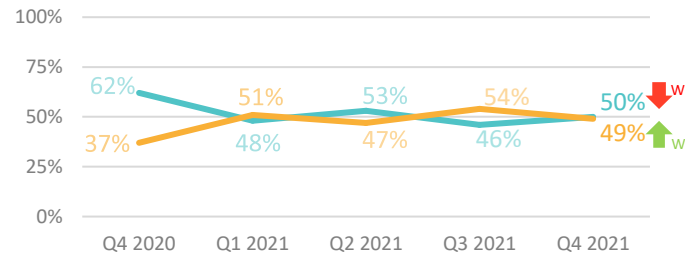


Purchasing Behavior Trends: Online or In-Store

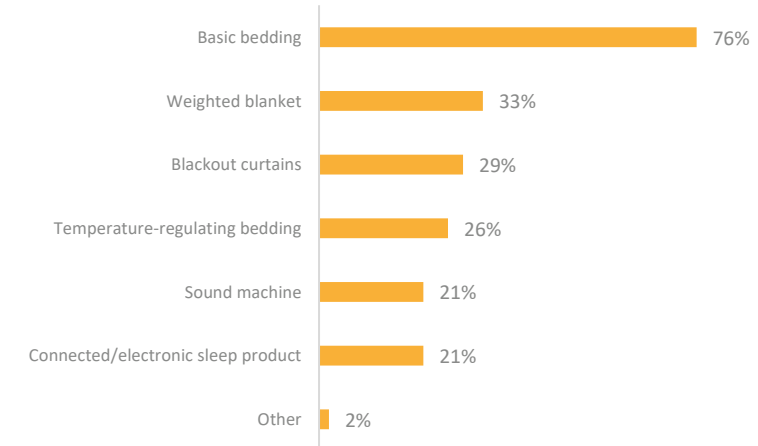
Mattress



Bedroom Products/Sleep Accessories



Bedroom Products/Sleep Accessories Q4

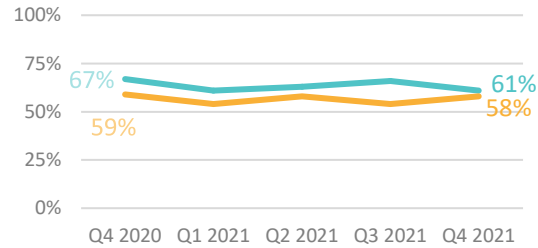


Up and down arrows indicate significance

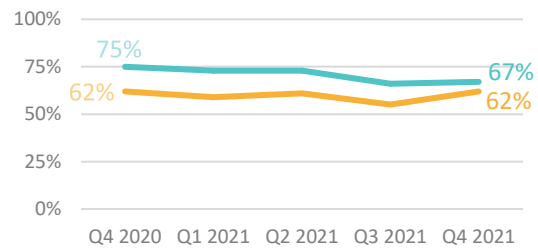
How Are People Buying and Shopping for Mattresses?

Online Behaviors

Prefer Purchasing Online

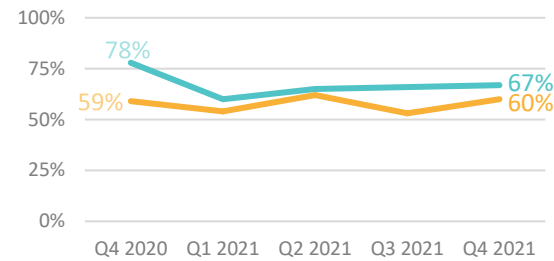


Shopping More Online

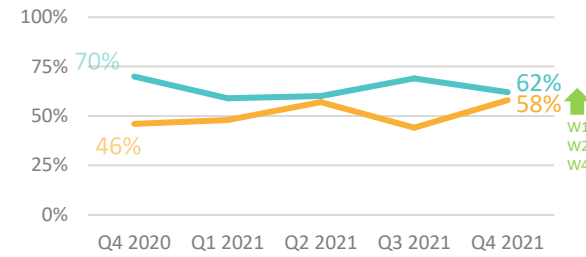


Attitudes Toward Retailers

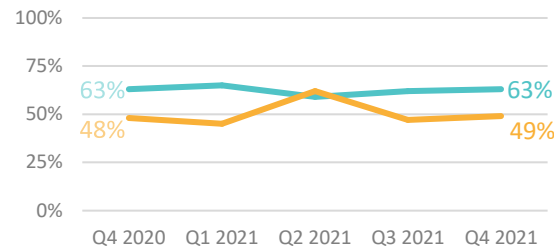
Purchasing at New Retailers



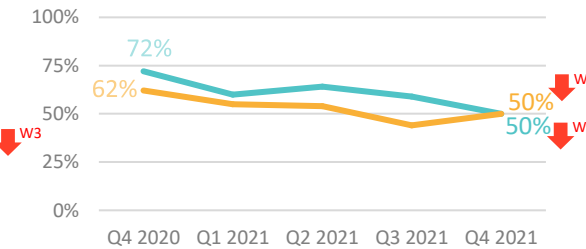
Shopping at New Retailers



Shopping More Locally

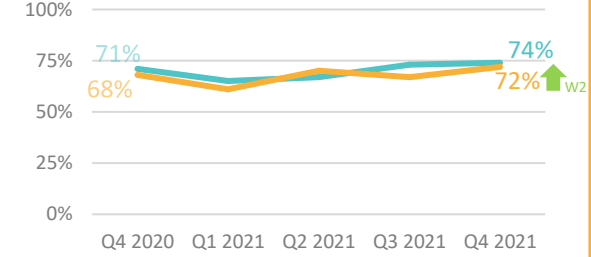


Shopping at COVID-Compliant Retailers

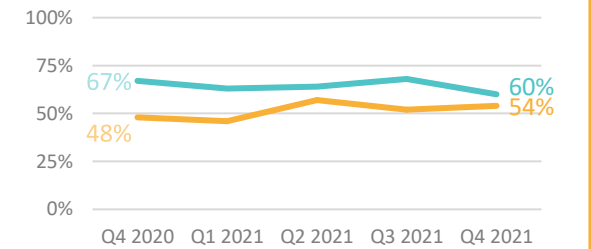


Other Attitudes/Behaviors

Spending More on Home

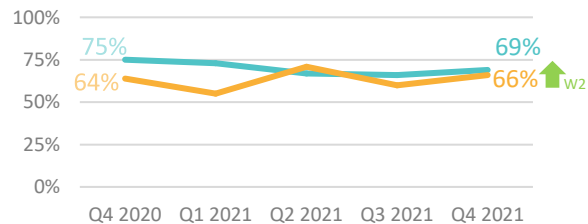


Missing In-Store Shopping Experience

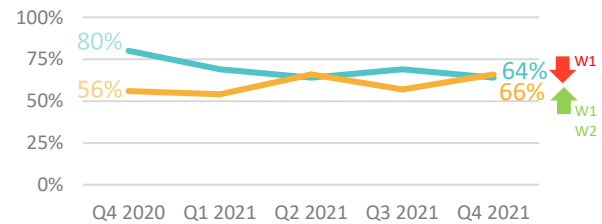


Attitudes Toward Brands

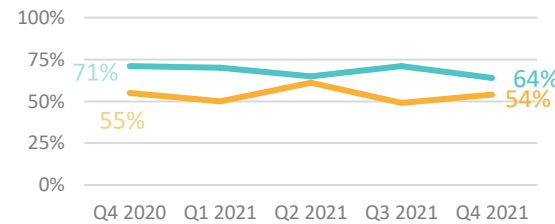
Purchasing New Brands



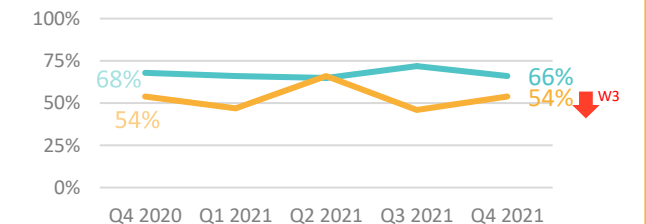
Shopping for New Brands



Buying Trusted Brands



Buying Brands That Align with My Values



— Mattress — Bedroom Products/Sleep Accessories*

Q4 label refers to responses received during the fourth quarter of 2021.

W1 = Q4 2020 • W2 = Q1 2021 • W3 = Q2 2021 • W4 = Q3 2021 • W5 = Q4 2021

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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

Key:

W1 = Q4 2020 wave one
W2 = Q1 2021 wave two
W3 = Q2 2021 wave three
W4 = Q3 2021 wave four
W5 = Q4 2021 wave five

Methodology (Q4 2021)

- 600 online surveys were completed December 2-16, 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), Q3 2021 (W4), and Q4 2021 (W5) 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.
 - > 316 (53%) purchased a mattress or bed/bedframe and bedroom products/sleep accessories.
 - 90 respondents had purchased a mattress or bed/bedframe.*
 - 226 purchased bedroom products/sleep accessories.
 - > 284 (47%) 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 Q4 2021 (W5).
 - > “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 Q4 2021 (W5).

Survey Questions

SCREENER

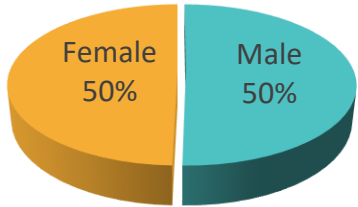
- S1. Have you purchased any of the following? Select all that apply.
- S2. What kind of mattress did you purchase?
- S3. You mentioned that you have purchased bedroom products/sleep accessories (e.g., **not** mattresses; items like pillows, white noise machine, weighted blanket, etc.). What item(s)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

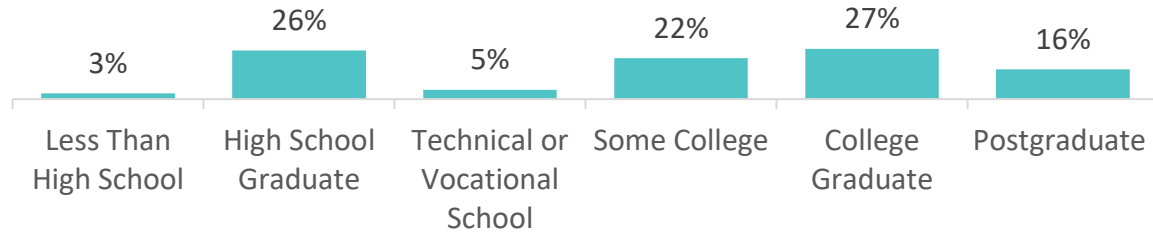
- Q1. Which of the following were part of your *shopping* experience before your recent [PIPE IN S1] purchase? Select all that apply.*
 - [If respondent purchased a mattress AND selected “Google searches” in Q1] Q1A. You said that Google searches were part of your shopping experience before your recent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



52%

No children living at home



39%

Children (< 18) living at home



12%

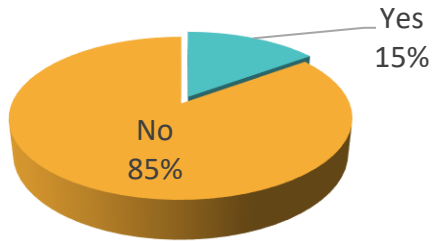
Adult children (18+) living at home



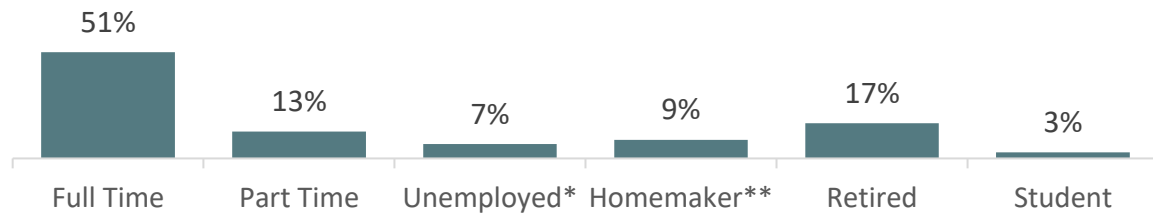
7%

Other adult (18+) family members living at home

Hispanic/Latino

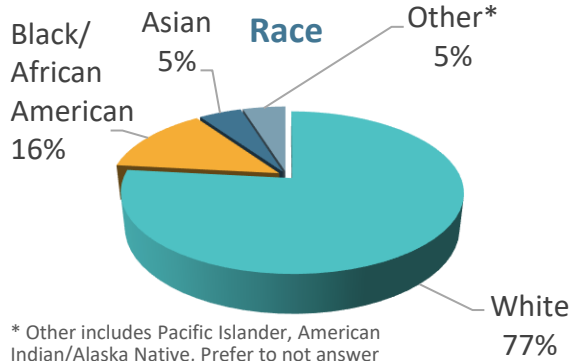


Employment



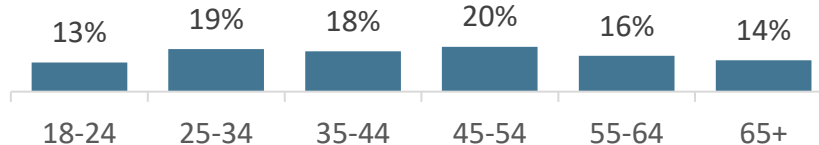
* Currently unemployed, looking for work

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

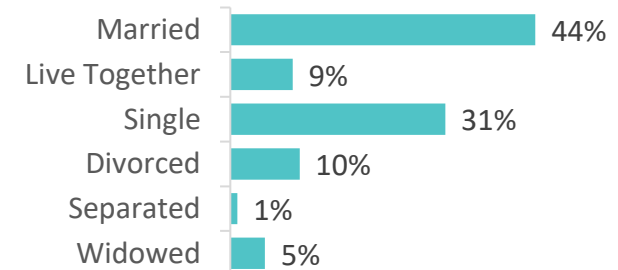


* Other includes Pacific Islander, American Indian/Alaska Native, Prefer to not answer

Age



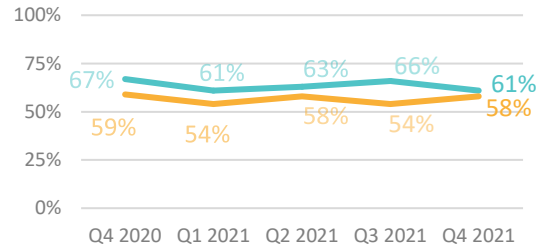
Marital Status



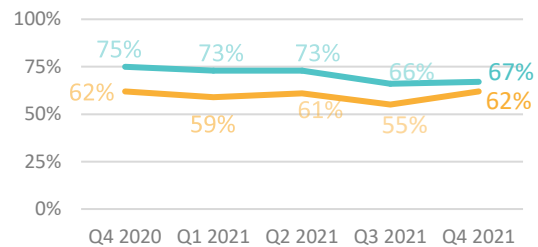
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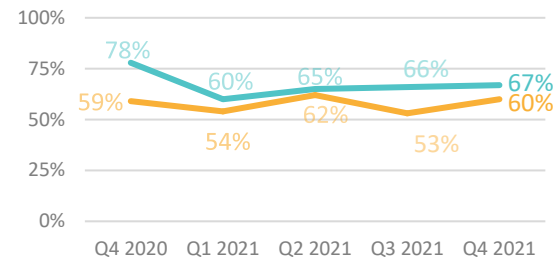


Shopping More Online

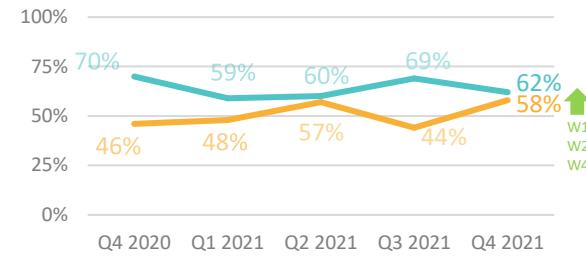


Attitudes Toward Retailers

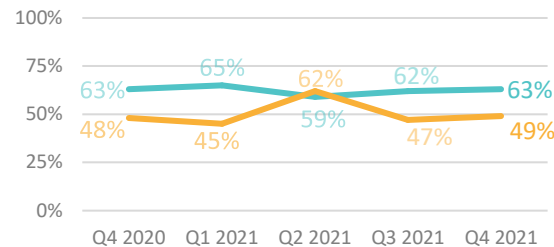
Purchasing at New Retailers



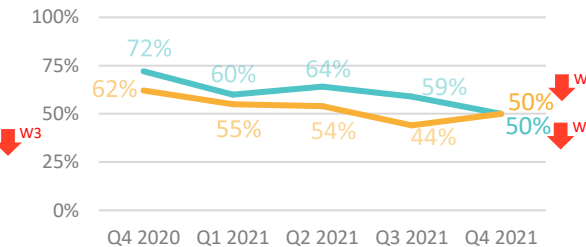
Shopping at New Retailers



Shopping More Locally

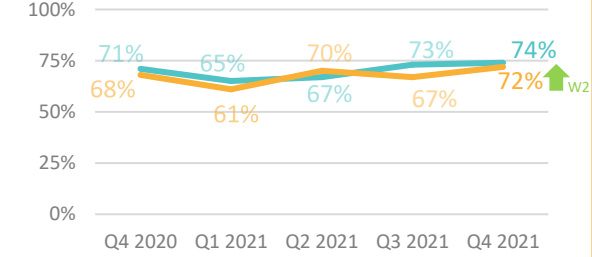


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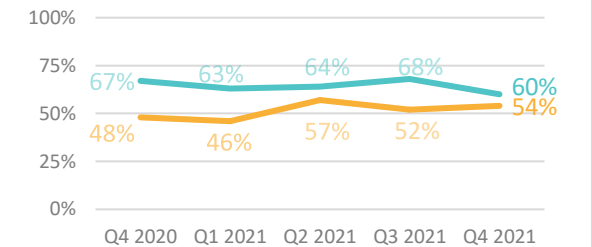


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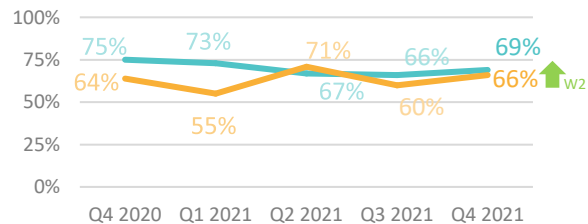


Missing In-Store Shopping Experience

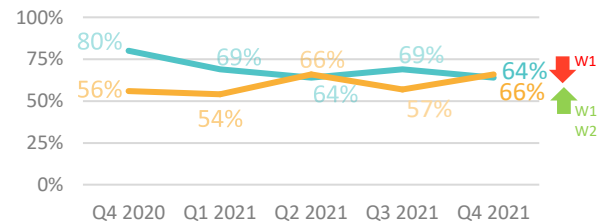


Attitudes Toward Brands

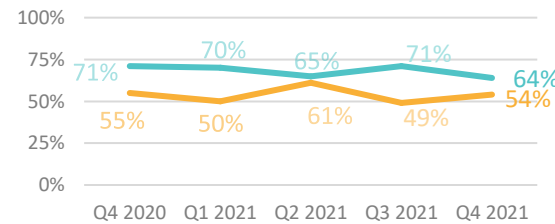
Purchasing New Brands



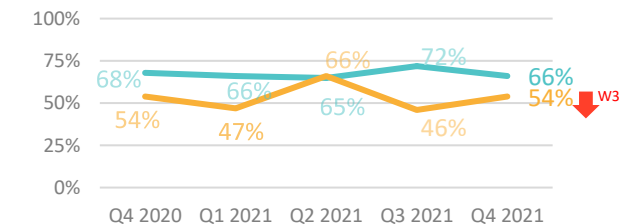
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