Inside the Mind of Today’s Mattress Consumer

Quarterly Tracker: Q4 2021
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?

**Current Consumer Concerns**

<table>
<thead>
<tr>
<th>Concern</th>
<th>Rank</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public/personal health</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Economy/financial outlook</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Social/civil issues</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Politics/political climate</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

**Concern About Current Environment**

- Mindfulness of how/where I spend my money: 65% (W1) to 66% (W5)
- Concern about my/my family’s finances: 66% (W1) to 66% (W5)
- Concern about my/my family’s health and well-being: 68% (W1) to 68% (W5)

**Consumer Confidence**

- Q4

**Important to Make Home Useful and Comfortable**

- Q4

- Top 2: 81%

**Shopping/Purchasing In-Store**

- Q4

**Traveling/Patronizing a Public Establishment**

- Q4

**Going to a Doctor**

- Q4

**Shopping/Purchasing Online**

- Q4

**Consumer confidence in travel and going to public places (e.g., restaurants) is still low, but has gone up since last quarter.**

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

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
How Are People Sleeping?

**Importance of Sleep**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Previous Rank</th>
<th>Q4 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good night’s sleep</td>
<td>1</td>
<td>76%</td>
</tr>
<tr>
<td>Relationships with family/friends</td>
<td>2</td>
<td>73%</td>
</tr>
<tr>
<td>Stress management</td>
<td>3</td>
<td>68%</td>
</tr>
<tr>
<td>Regular medical checkups</td>
<td>4</td>
<td>66%</td>
</tr>
<tr>
<td>Mental health and self-care routines</td>
<td>5</td>
<td>63%</td>
</tr>
<tr>
<td>Balancing work schedule and personal/life obligations</td>
<td>5</td>
<td>63%</td>
</tr>
<tr>
<td>Healthy diet</td>
<td>6</td>
<td>60%</td>
</tr>
<tr>
<td>Physical exercise</td>
<td>6</td>
<td>60%</td>
</tr>
</tbody>
</table>

**How Do They Feel About Their Sleep?**

- Very Poor: 3%
- Poor: 10%
- OK: 26%
- Good: 33%
- Very Good: 28%

Top 2: 61%

- Top 2: 61%

**The Current Environment Is Affecting Sleep**

Top 3: 66%

- Economy/financial outlook: 30%
- Public/personal health: 19%
- Politics/political climate: 17%
- Social/civil issues: 8%

**In Their Own Words**

- “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.”

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What Are People Buying?

Top Home Purchases* Q4

<table>
<thead>
<tr>
<th>Purchased</th>
<th>Plan to Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bedroom Products</td>
<td>1</td>
</tr>
<tr>
<td>Electronics</td>
<td>2</td>
</tr>
<tr>
<td>Storage Furniture/ Organizers</td>
<td>3</td>
</tr>
<tr>
<td>Mattresses</td>
<td>8</td>
</tr>
</tbody>
</table>

Purchasing Behavior Trends: Online or In-Store

**Mattress**
- Q4 2020: 39% Online, 60% In-Store
- Q1 2021: 41% Online, 58% In-Store
- Q2 2021: 46% Online, 53% In-Store
- Q3 2021: 48% Online, 50% In-Store
- Q4 2021: 46% Online, 54% In-Store

**Bedroom Products/Sleep Accessories**
- Q4 2020: 37% Online, 62% In-Store
- Q1 2021: 48% Online, 51% In-Store
- Q2 2021: 47% Online, 53% In-Store
- Q3 2021: 46% Online, 54% In-Store
- Q4 2021: 49% Online, 50% In-Store

Purchases for Their Homes Q4

<table>
<thead>
<tr>
<th>Category</th>
<th>Purchased in Q4 2021</th>
<th>Plan to Purchase in Q4 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bedroom Products/Sleep accessories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Storage furniture and/or organizers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home appliances</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furniture</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoor power equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercise equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mattress or bed/bedframe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hot tub or sauna</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Bedroom Products/Sleep Accessories Q4

- Basic bedding: 76%
- Weighted blanket: 33%
- Blackout curtains: 29%
- Temperature-regulating bedding: 26%
- Sound machine: 21%
- Connected/electronic sleep product: 21%
- Other: 2%

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

Inside the Mind of Today's Mattress Consumer – Quarterly Tracker: Q4 2021
How Are People Buying and Shopping for Mattresses?

Online Behaviors

Prefer Purchasing Online

Shopping More Online

Attitudes Toward Retailers

Purchasing at New Retailers

Shopping More Locally

Shopping at New Retailers

Shopping at COVID-Compliant Retailers

Missing In-Store Shopping Experience

Other Attitudes/Behaviors

Spending More on Home

Attitudes Toward Brands

Purchasing New Brands

Shopping for New Brands

Buying Trusted Brands

Buying Brands That Align with My Values

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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

* Bedroom products/sleep accessories include items like pillows, white noise machines, weighted blankets, etc.
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
600 online surveys were completed December 2-16, 2021, with adults 18 years and older.

A sample size of 600 provides a 95% ±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).

* Three respondents purchased a bed/bedframe only (without a mattress).
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.
How Are People Buying and Shopping for Mattresses?

### Online Behaviors
- **Prefer Purchasing Online**
  - W1 = W2 = W3 = W4 = W5

- **Shopping More Online**
  - Q4 2020: 72%, Q1 2021: 75%, Q2 2021: 73%, Q3 2021: 73%, Q4 2021: 58%
  - W1 = W2 = W3 = W4 = W5

### Attitudes Toward Retailers
- **Purchasing at New Retailers**
  - Q4 2020: 59%, Q1 2021: 54%, Q2 2021: 58%, Q3 2021: 54%, Q4 2021: 60%
  - W1 = W2 = W3 = W4 = W5

- **Shopping at New Retailers**
  - W1 = W2 = W3 = W4 = W5

### Other Attitudes/Behaviors
- **Spending More on Home**
  - W1 = W2 = W3 = W4 = W5

- **Missing In-Store Shopping Experience**
  - Q4 2020: 62%, Q1 2021: 60%, Q2 2021: 52%, Q3 2021: 54%, Q4 2021: 58%
  - W1 = W2 = W3 = W4 = W5

### Attitudes Toward Brands
- **Purchasing New Brands**
  - W1 = W2 = W3 = W4 = W5

- **Shopping for New Brands**
  - Q4 2020: 56%, Q1 2021: 54%, Q2 2021: 57%, Q3 2021: 60%, Q4 2021: 63%
  - W1 = W2 = W3 = W4 = W5

- **Buying Trusted Brands**
  - Q4 2020: 55%, Q1 2021: 50%, Q2 2021: 61%, Q3 2021: 49%, Q4 2021: 63%
  - W1 = W2 = W3 = W4 = W5

- **Buying Brands That Align with My Values**
  - W1 = W2 = W3 = W4 = W5

### Online Behaviors
- **Shopping More Locally**
  - Q4 2020: 48%, Q1 2021: 45%, Q2 2021: 50%, Q3 2021: 47%, Q4 2021: 49%
  - W1 = W2 = W3 = W4 = W5

### Online Behaviors
- **Shopping More Online**
  - W1 = W2 = W3 = W4 = W5

### Online Behaviors
- **Shopping at COVID-Compliant Retailers**
  - Q4 2020: 44%, Q1 2021: 50%, Q2 2021: 60%, Q3 2021: 50%, Q4 2021: 58%
  - W1 = W2 = W3 = W4 = W5

*Up and down arrows indicate significance*

1/31/2022

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