



MICROSOFT ADVERTISING INSIGHTS

# Sleep well: mattress search trends and purchasing behavior

Microsoft Advertising. Intelligent connections.



# Agenda



1 Landscape



2 Mattress consumer decision journey



3 Health & Wellness trends



4 Query trends

## HIGHLIGHTS

# Mattress searches have outpaced original predictions, as users connect restful sleep with growing health concerns

1

Mattress searches, on average, are up nearly 80% year over year, grossly exceeding initial 2019 estimates

2

Health-focused sleep accessories are key revenue drivers within the sleep industry

3

Nearly 70% of mattress shoppers also visited Health & Wellness domains, especially those pertaining to conditions & diseases

4

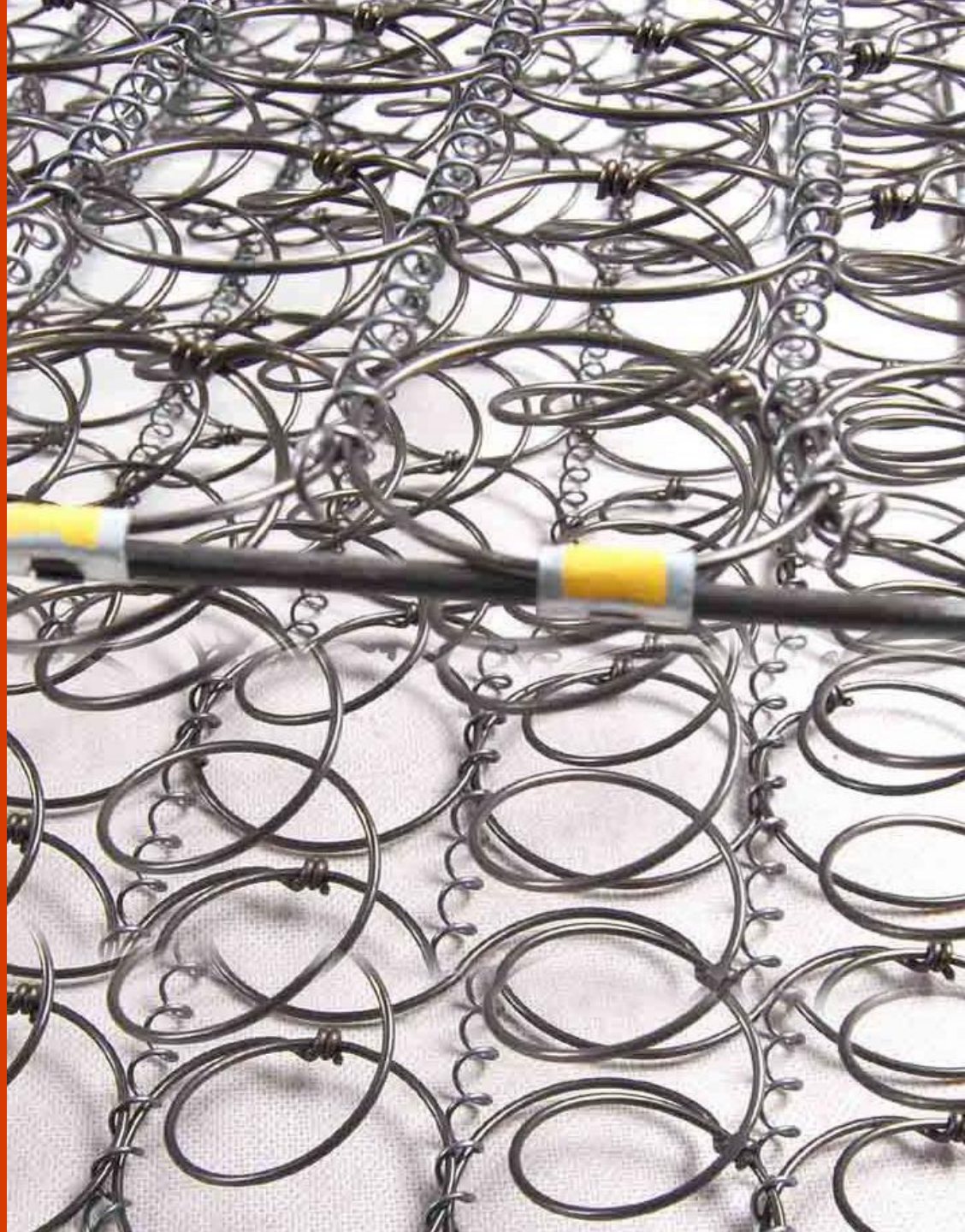
Users shopping for a mattress are 2.6x more likely to research sleep disorders

5

Average monthly searches surged in 2021 across queries concerning side sleep, back pain, and completing a mattress purchase online

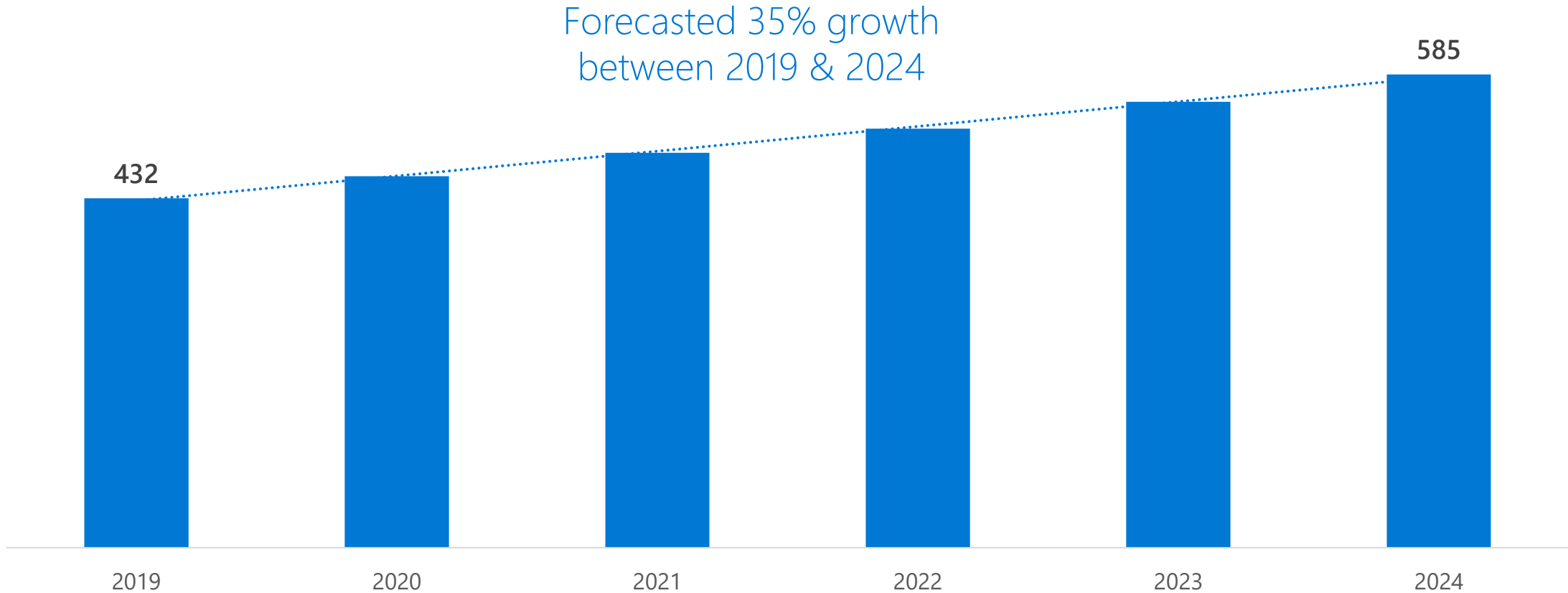


# Landscape



# In 2019, the worldwide (WW) sleep market anticipated 35% growth by 2024

Sleep economy WW size from 2019 to 2024 (billion U.S. dollars)<sup>1</sup>



# COVID-19 disrupted the marketplace, significantly shifting year over year (YoY) search volume

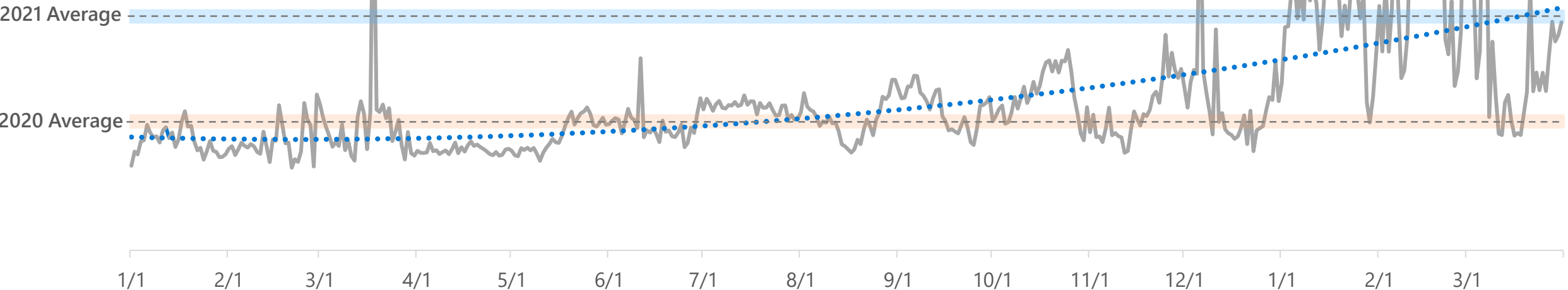
Indexed mattress searches by day



2/20/2021, 100

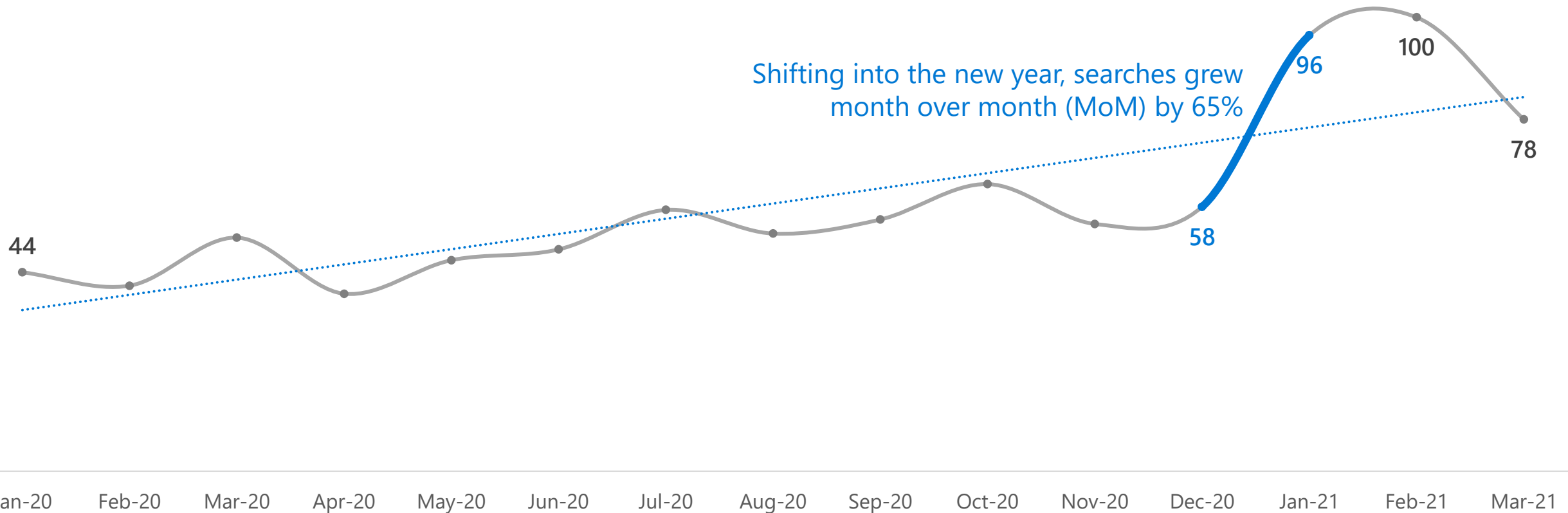
3/18/2020, 82

12/6/2020, 77



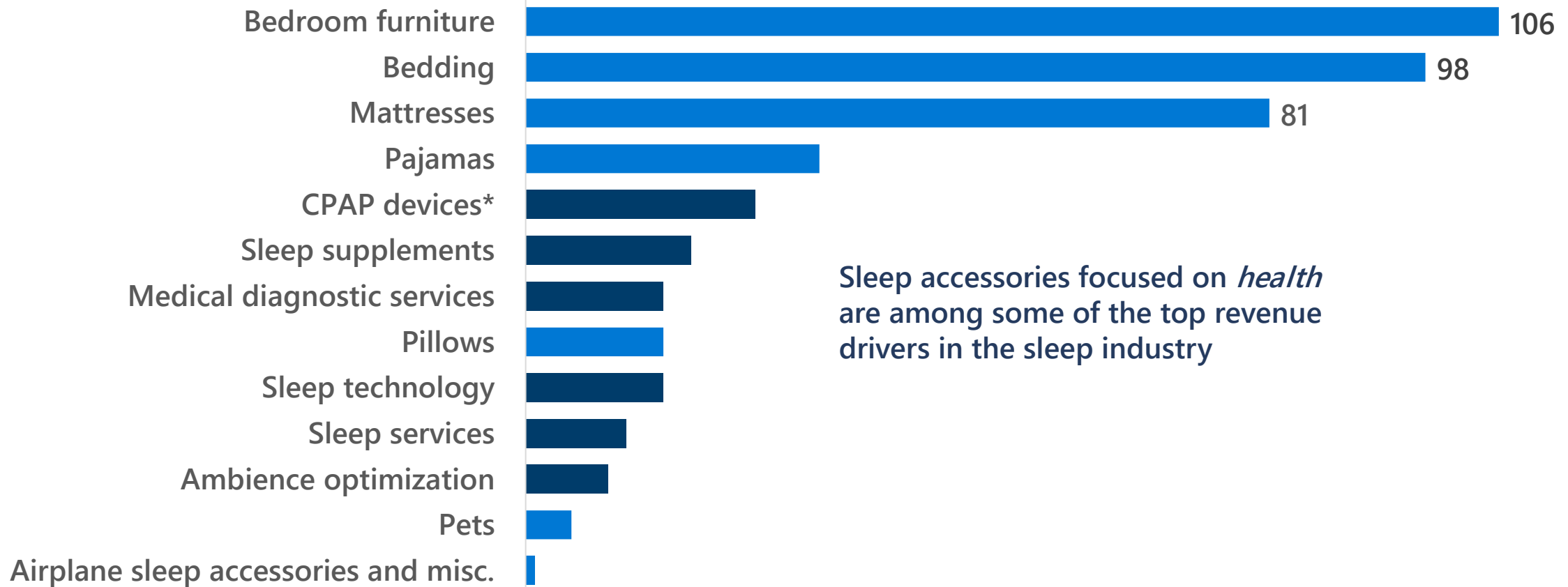
# As a result, 2021 mattress searches are up nearly 80% YoY on average

Indexed mattress searches by month



# Mattresses and sleep accessories were top drivers for the sleep economy

Sleep economy WW size in 2019, by product category (billion U.S. dollars)<sup>1</sup>



Sleep accessories focused on *health* are among some of the top revenue drivers in the sleep industry

Source: Note(s): Worldwide; 2019, Source(s): Casper; Frost & Sullivan; Statista  
\*CPAP: continuous positive airway pressure





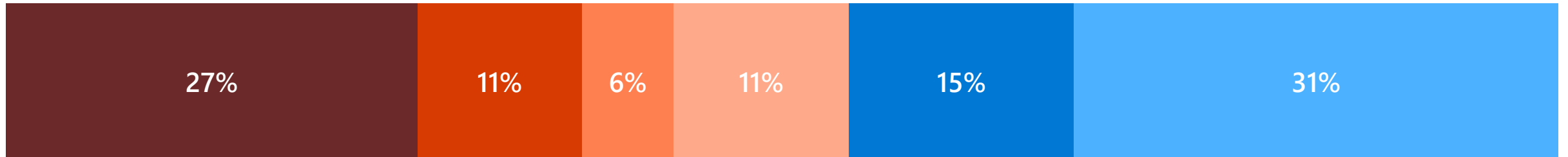
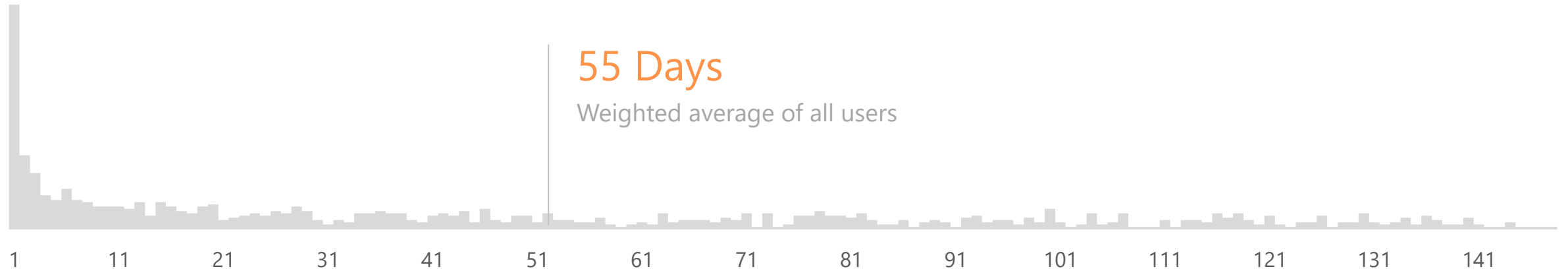
# Mattress consumer decision journey



46% of shoppers took longer than 30 days to complete their journey, with 31% of shoppers exceeding 2 months



232 users – under a day

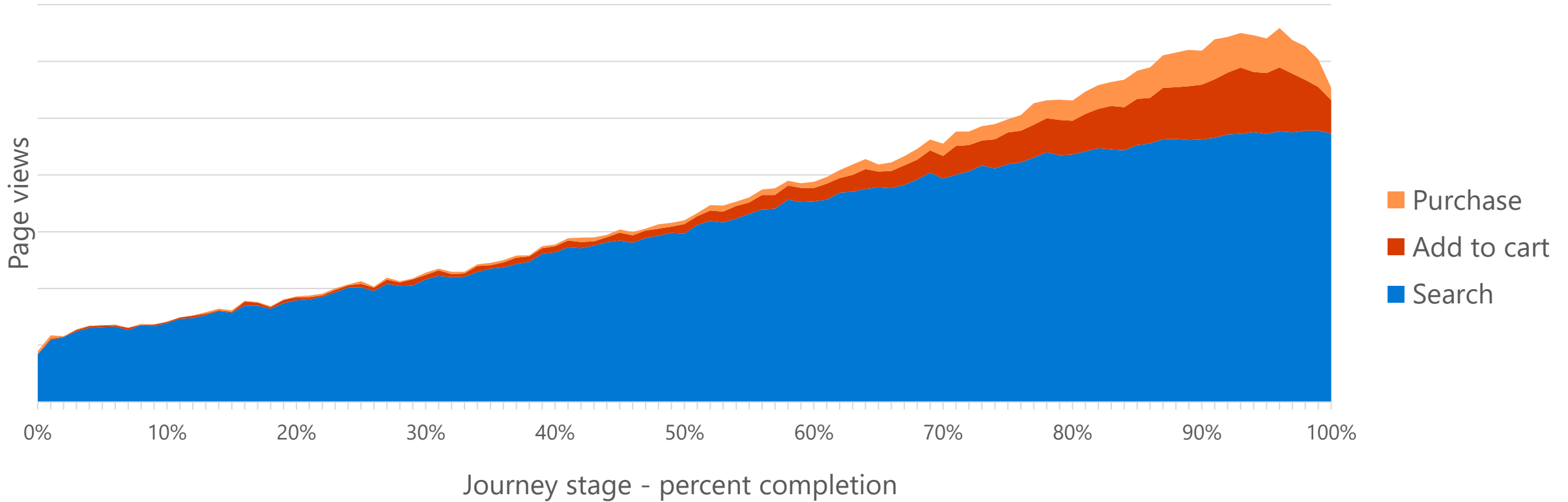


■ 0-1 Day ■ 2-7 Days ■ 8-14 Days ■ 15-30 Days ■ 31-60 Days ■ 61+ Days

# Search played an integral role as activity steadily increased throughout the consumer journey

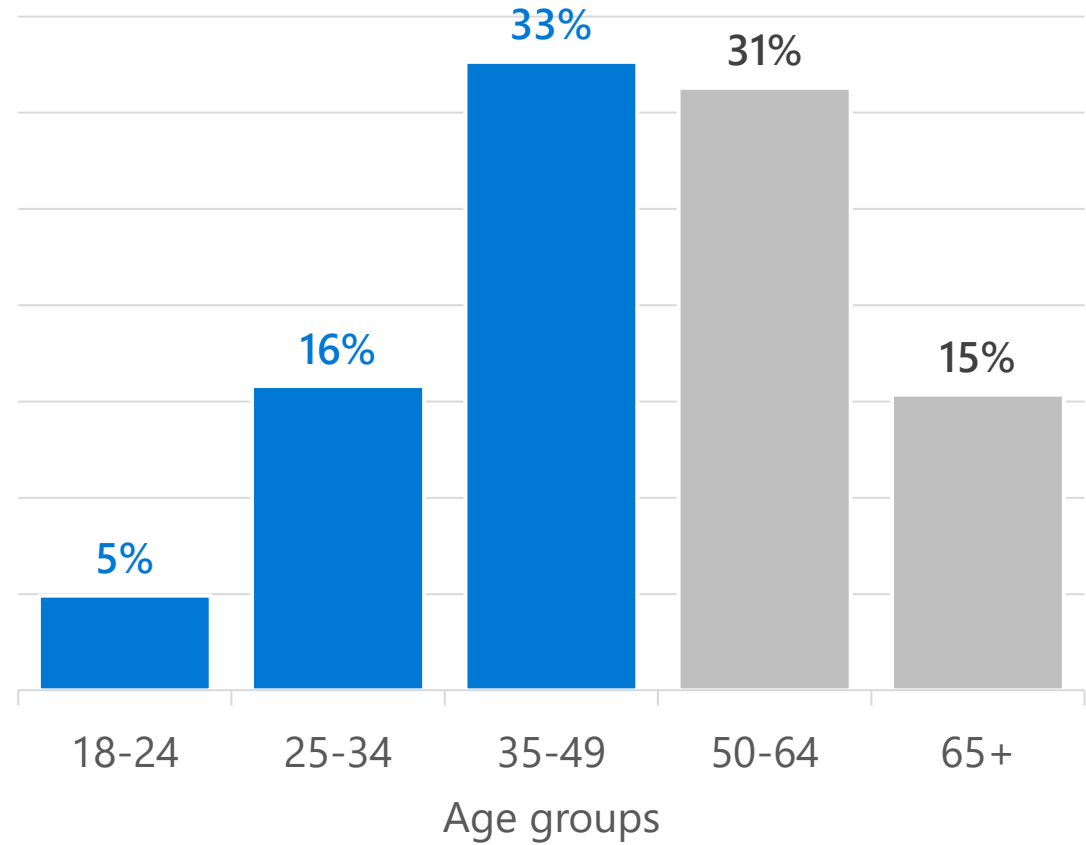


User activity by percent of journey



**70%** of the mattress shoppers were **female** and **54%** were **under the age of 49**

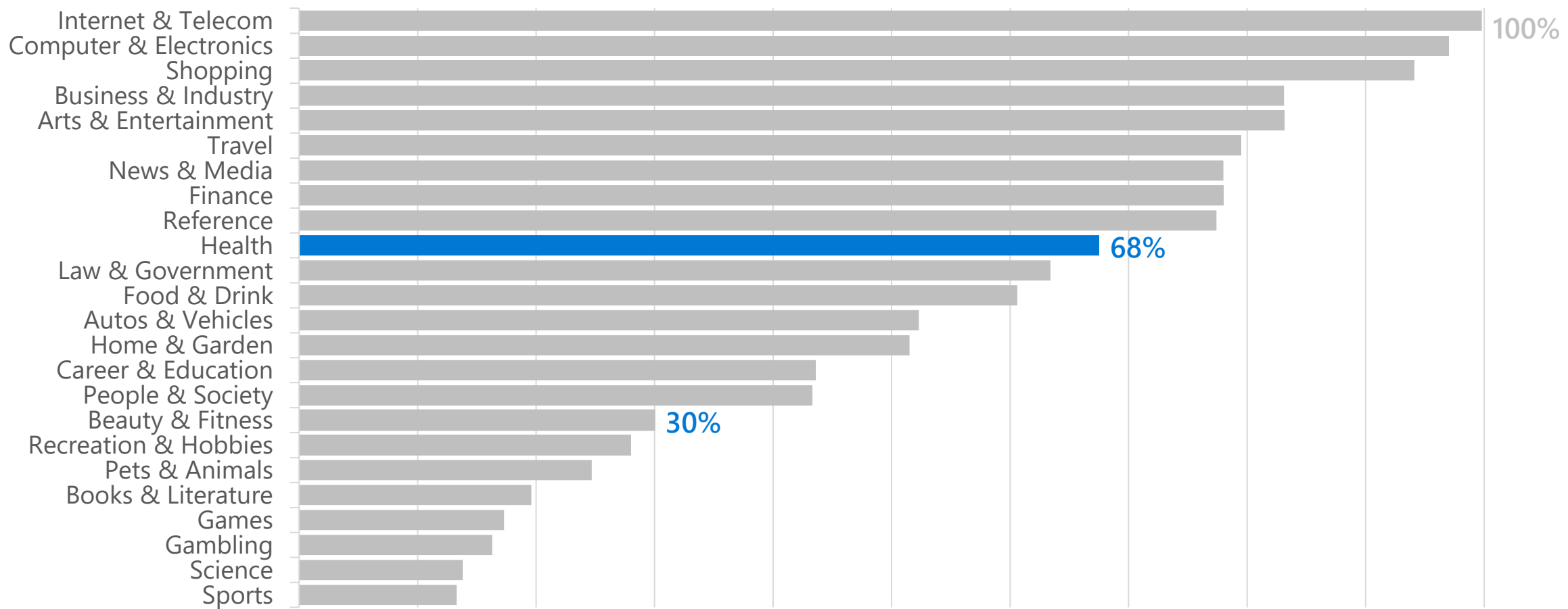
Percent distribution of mattress shoppers



# Nearly 70% of mattress shoppers visited **health-related domains**, stressing the correlation between health and rest



Percent of mattress shoppers that visited other site categories





# Health & Wellness trends

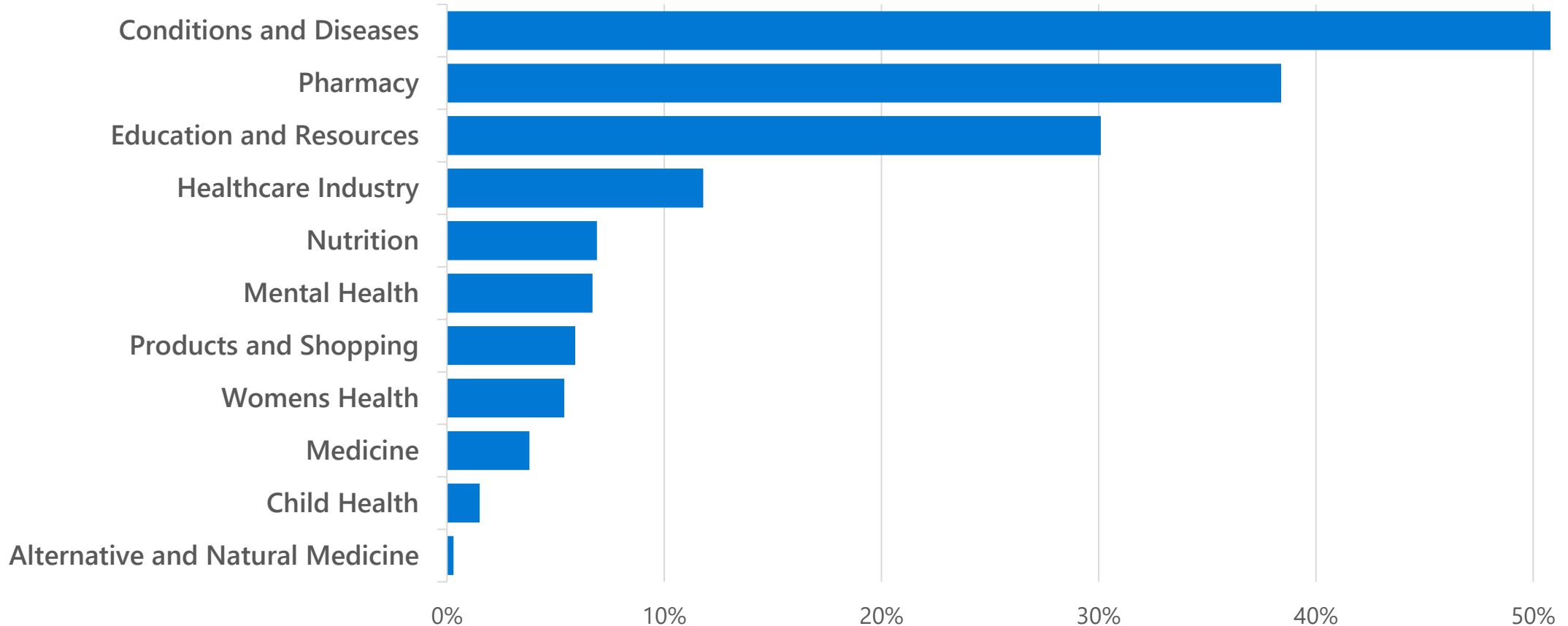
*for those shopping for a mattress*



# Mattress shoppers researched **Conditions & Diseases** above all other Health & Wellness categories

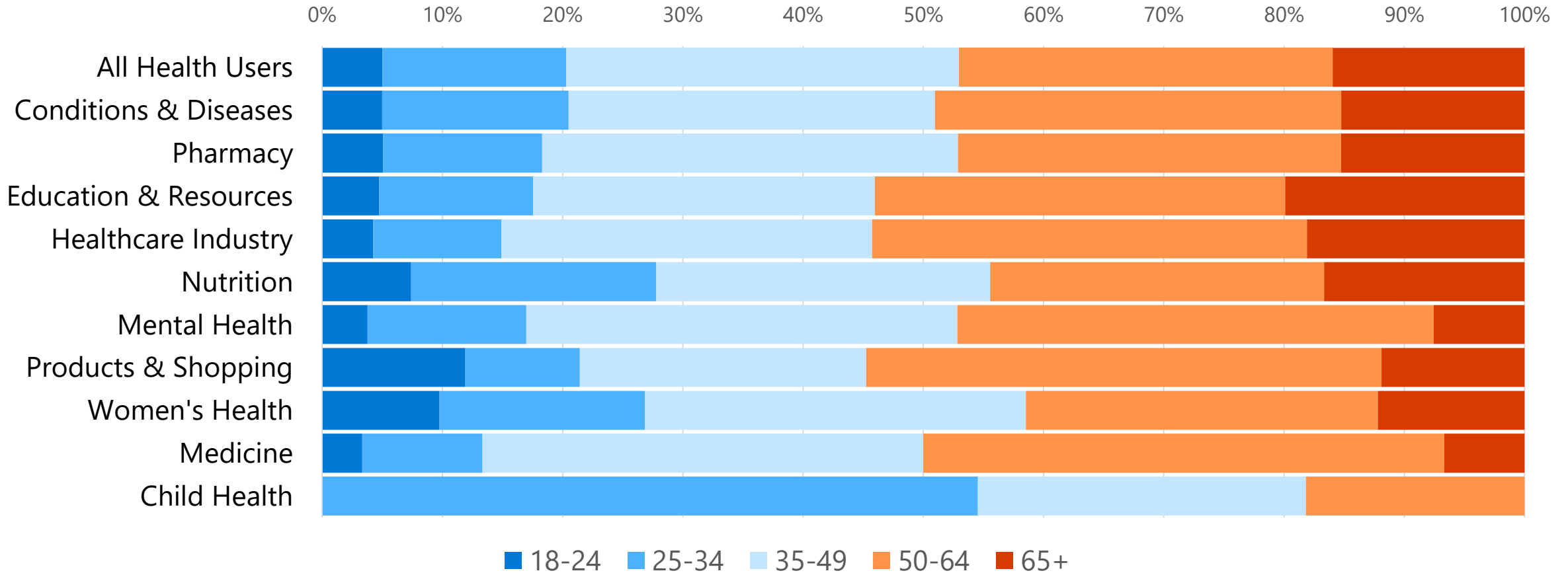


Percent of overall mattress shoppers by Health & Wellness category



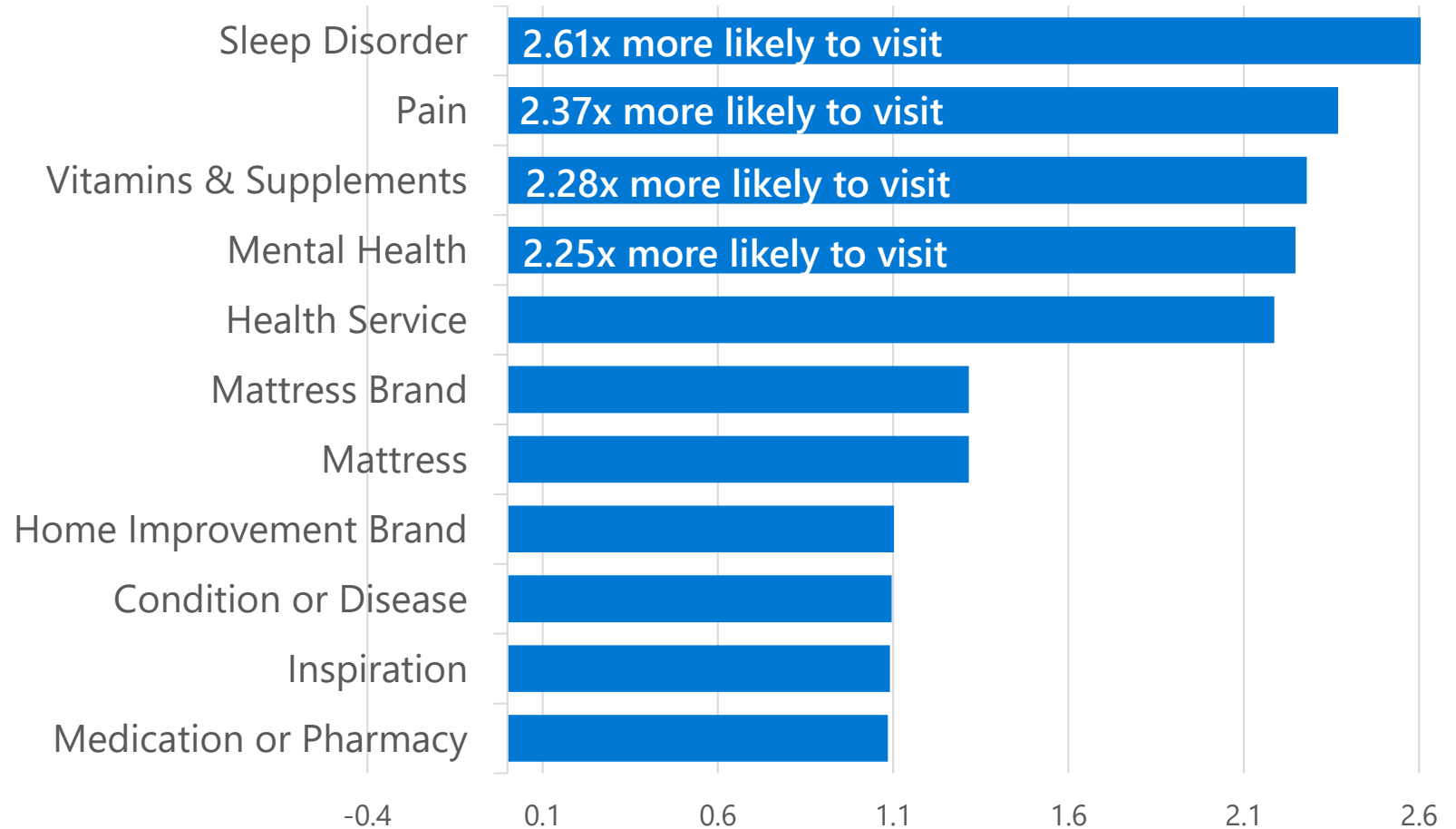
# Health & Wellness age groups align with overall mattress shopper audience

Percent distribution of mattress shoppers that visited Health & Wellness sites





# Mattress shoppers are likely to visit a domain related to:





# Query trends



# Average monthly searches surged across queries concerning 'side sleep', 'back pain', and 'buy online'



best mattress side sleeper

best mattress side sleepers back pain deals

buy mattress online

mattresses side sleep

best mattress side sleepers back pain

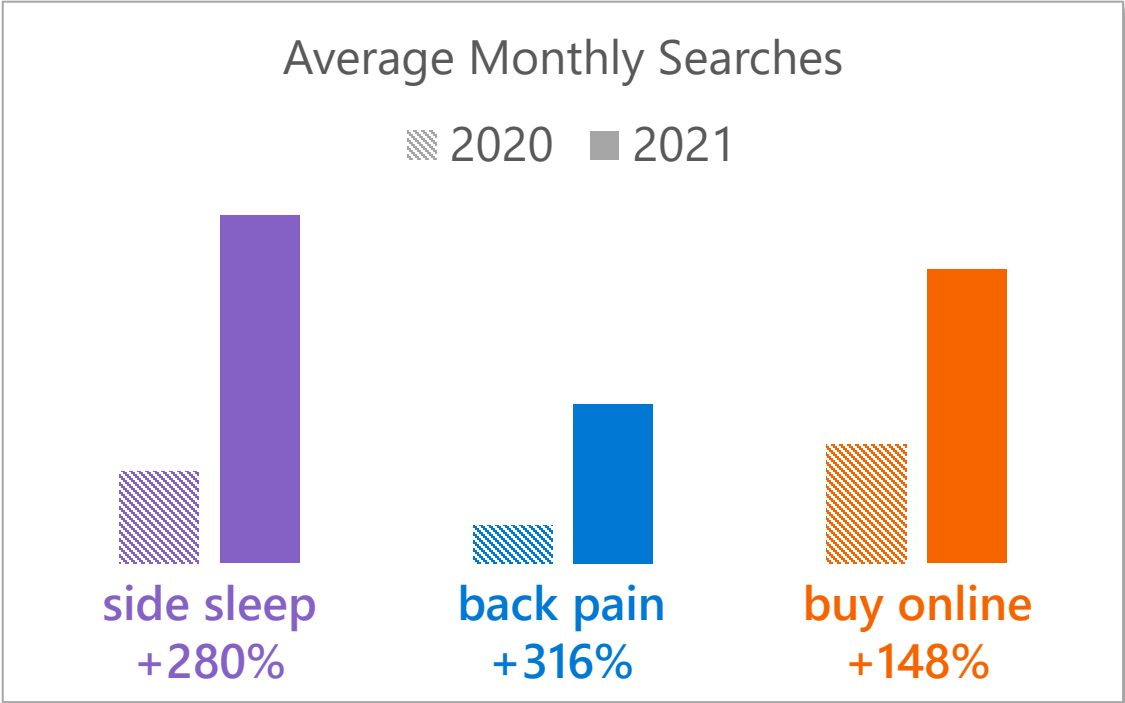
best mattresses side sleep

best type mattress side sleepers back pain

top mattress side sleepers

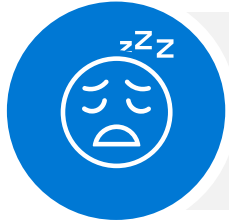
best mattress side sleepers

most recommended mattress back pain



Source: Microsoft internal data

# Notable searches across Health & Wellness categories:



## Sleep Disorders

- 'mattress for'
- 'sleep apnea'
- 'side sleepers'
- 'sleep aid'
- 'natural sleep'
- 'sleep study'
- 'sleeping pills'
- 'sleep solution'



## Pain

- 'back pain'
- 'chest pain'
- 'pain relief'
- 'shoulder pain'
- 'lower back'
- 'knee pain'
- 'hip pain'
- 'mattress for'



## Vitamins & Supplements

- 'vitamin c'
- 'vitamin d'
- 'side effects'
- 'supplements for'
- 'vitamin d3 for women'
- 'benefits of blood pressure'



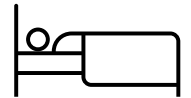
## Mental Health

- 'mental health'
- 'anxiety cause'
- 'anxiety attack'
- 'Reduces stress'
- 'positive emotions'
- 'lowering anxiety'
- 'breathing exercises'
- 'anxiety symptoms'

# Key takeaways



- COVID-19 disrupted the mattress online marketplace, significantly lifting search volume; 2021 mattress searches are up nearly 80% YoY on average



- Bedroom furniture and sleep accessories were top drivers for the sleep economy in 2019, prior to COVID-19
- In an internal survey, 70% of mattress shoppers were female and/or visited health related domains prior to searching for a new mattress
- Mattress shoppers are most likely to visit domains related to: sleep disorders, pain, vitamins, or mental health



- Average monthly searches surged across queries concerning 'side sleep', 'back pain', and 'buy online'

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