IKEA Sleep Consumer Quantitative Study

Belgium Market Report

November 2024

IKEA

Contact

ESOMAR | member

Certified B Corporation

Caroline Holme, Executive Director, London
caroline.holme@globescan.com

Sylvie Scheer, Principal, Paris
sylvie.scheer@globescan.com

Esme Brewin, Manager, London
esme.brewin@globescan.com

November 2024

GlobeScan

Contents

GlobeScan

Introduction

This report provides consumer insights related to "Complete Sleep."

IKEA partnered with GlobeScan to conduct consumer research across 57 countries to generate data and insights for the FY25 commercial focus on "Complete Sleep."

The main aspects covered in the study are:

1. Light touch sleep insights

- Consumer insights to support communications and commercial activation of "Complete Sleep"
- Data, insights, and stories at global and country levels
- Unique, interesting, and fun material in line with IKEA's creative approach
- Sleep essentials – data and insights at a high level for PR purposes

2. Societal aspects and insights on vulnerable groups
(building on GlobeScan desk research into "sleep inequality")

- Understanding of sleep issues arising from demographic, social, and economic factors
- Headline data and insights related to sleep inequality among vulnerable groups
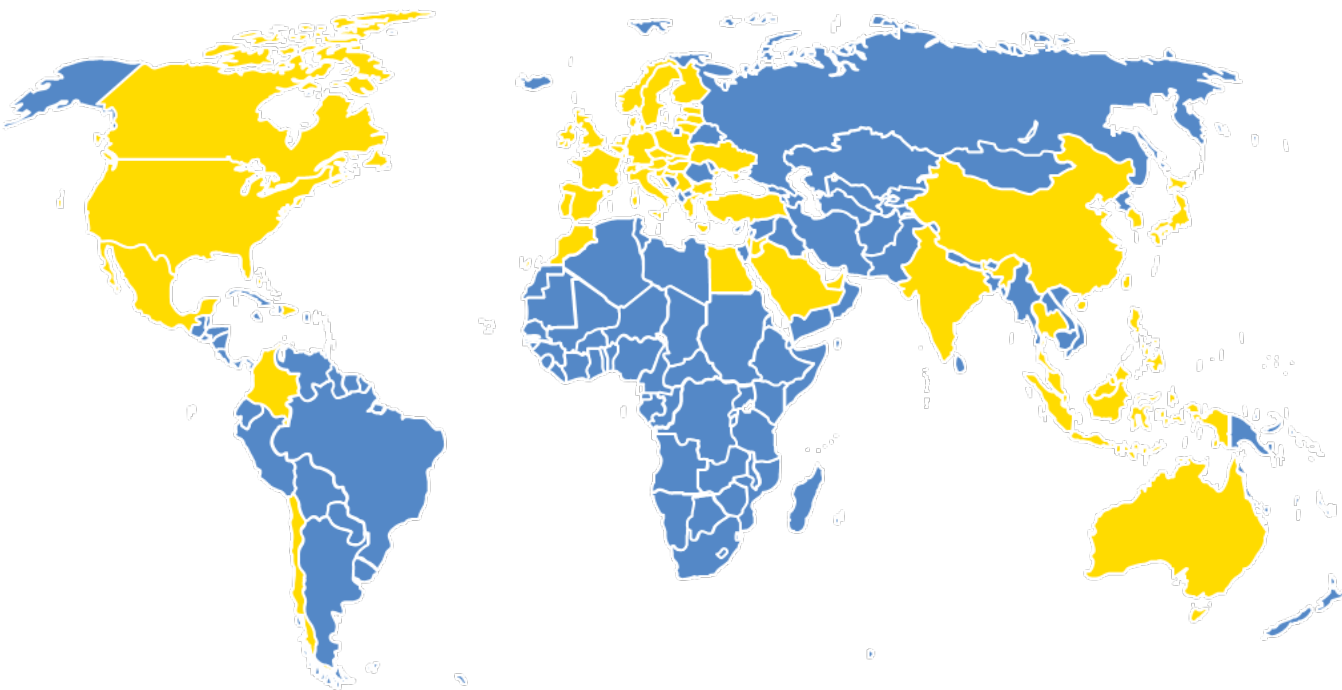- Material for the markets to use in their PR/advocacy throughout FY2025

GlobeScan

Methodology

The research was conducted online using national consumer research panels to recruit respondents in 57 markets.

Total global sample size is *n*=55,221. The sample size for each of the 57 markets is approximately *n*=1,000. All countries have been weighted equally in the global figures.

The samples were designed to be nationally representative as far as is realistically possible by gender, age, and regions using online panels. Exceptions include several countries* where a disproportionate number of consumers are highly educated due to patterns of online access. Note that there are fewer respondents aged 65+ in the Dominican Republic, Greece, Kuwait, Morocco, Serbia, Saudi Arabia, and Thailand. Regional quotas were not achieved in Ukraine, Jordan, and Qatar due to ongoing wars.

Due to rounding, numbers may not always add up to 100 percent. Fieldwork was conducted between 13th August 2024 and 20th September 2024.

*These countries include India, the Philippines, Chile, Mainland China, Colombia, Croatia, Czech Republic, Dominican Republic, Egypt, Jordan, Kuwait, Malaysia, Mexico, Morocco, Romania, Serbia, Thailand, Türkiye, and Ukraine.

Region	Countries
Americas	Canada, Chile, Colombia, Dominican Republic, Mexico, USA
APAC	Australia, Hong Kong SAR, India, Indonesia, Japan, Mainland China, Malaysia, Philippines, Singapore, South Korea, Taiwan, Thailand
Europe	Austria, Belgium, Bulgaria, Croatia, Czech Republic, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Spanish Islands, Switzerland, UK, Ukraine
Middle East	Israel, Jordan, Kuwait, Qatar, Saudi Arabia, Türkiye, UAE
Nordics	Denmark, Finland, Norway, Sweden
North Africa	Egypt, Morocco

A full breakdown of the regions, countries and sample size is provided in the Appendix.

GlobeScan

How to Use the Portal for IKEA Reports

Navigation of the Online Tool
- The dashboard for all 57 market reports and the global report will be accessible via a URL.
- Once the link has loaded, click on the folder drop-down labelled 'IKEA 2024' and click into the project portal.
- On the left hand side of the screen you will be able to navigate the reports by clicking on the chapters which will be exactly the same structure as the hard copies of the reports.
- Once clicking on a slide that has charts on it, please give it a few seconds to load the data.
- Clicking on the GlobeScan logo on the lower right-hand corner of the screen will advance it to the next slide.
- You can export the reports at anytime - in excel, ppt or pdf format.
- Please copy and paste this URL for a video demo on how to use the portal: https://globescaneuro.sharefile.eu/public/share/web-sfa346937f1364f0d93a4d4d259380f88

Examples of drop-downs to filter the data

Filtering the data
- IKEA teams will be able to filter the country reports using the filter tool (pictured above) which is located on slide 3 of the country report.
- The drop-downs cover a range of demographic, socio-economic, environmental and lifestyle factors.
- Selecting an option in each of these filters will automatically update the data for the entire report, providing each user with a way to cross-cut the analysis in a myriad of ways.
- Note that you must select both the market and regional breakdown filters in order to view the relevant regional data for the selected country.
- The total sample size on the bottom right of the pages throughout the dashoboard will automatically update with the filters - a good way to sense check how many filters are selected.

Filter Selection

Demographics

Market

Belgium

Regional Breakdown Charts*

Central Europe

Region

(All)

This filter refers to larger-scale regions e.g. APAC, North Africa. Both the market and regional breakdown filters must be selected before viewing the report.

Gender

(All)

Age

(All)

Household Income

(All)

Race - USA only

(All)

Parents

(All)

People with Disabilities

(All)

Marginalized Groups

(All)

Household Attributes

Size of Household

(All)

Who Lives in the Household

(All)

Type of Housing

(All)

Employment Situation

Shift Workers

(All)

Commuters

(All)

Employment Status

(All)

Neighbourhood attributes

Type of Neighbourhood

(All)

Sense of Community

(All)

Life satisfaction

Life satisfaction

(All)

Total sample size based on filter selections = 1,000

Globe Scan

Market Summary

Sleep Index, Global, Region and Market, Average out of 100, 2024
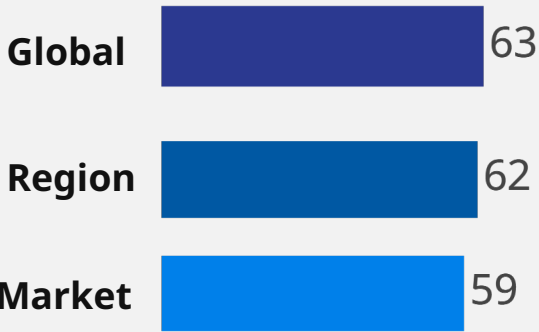
- Global: 63
- Region: 62
- Market: 59

Sleep Attitudes, %, 2024

34% are **Sleep Lovers**

33% are **Sleep Worriers**

8% are **Sleep Sceptics**

Levels of Satisfaction with Different Bedroom Items, %, 2024

Top Three
- Bedding: 84%
- Bed: 82%
- Mattress: 79%

Bottom Three
- Temperature: 8%
- Mattress: 9%
- Organisation/storage: 11%
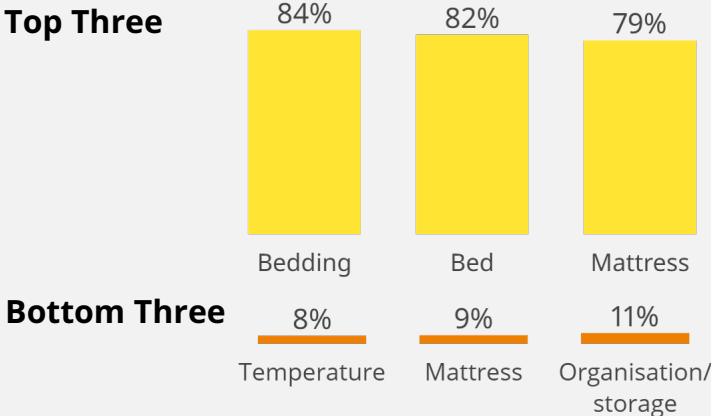
Bed and Wake-up Times, Mode, 2024

23:00 is the most common bedtime

7:00 is the most common wake-up time

Electronic Device Use in the Bedroom, %, 2024

- Phone: 57%
- Alarm clock: 40%
- TV: 23%
- Laptop/iPad: 18%
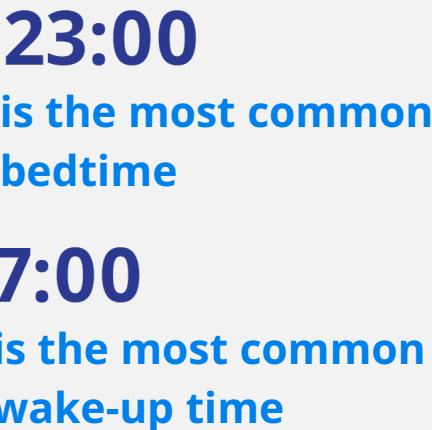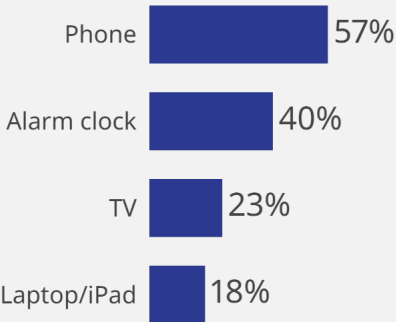
Barriers to Better Sleep, Top Three, %, 2024

- Feeling stressed: 18%
- Anxiety disorder: 16%
- Pain/Chronic pain: 12%

GlobeScan
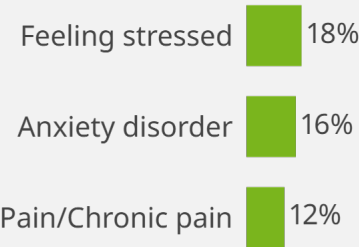
Section 1:

Overall Sleep Perceptions

GlobeScan

Sleep Experience

Self-rated Sleep Quality, %, 2024

Good (4+5): 33%

Satisfactory: 35%

Poor (1+2): 33%

Sleep Flow, %, 2024

Up to twice: 74%

More than twice: 26%

Drift-off Time, %, 2024

< 15 minutes: 33%

16–30 minutes: 32%

31-45 minutes + 46-60 minutes + More than 60 minutes: 35%

Wake-up State, %, 2024

Once or twice per week: 35%

Never: 20%

Three or four times per week + Five or six times per week + Every day: 44%

Q12. Thinking about the past few weeks, how would you rate your sleep quality? / Q22. On average, how long does it take you to fall asleep? / Q23. During your average sleep, how often do you wake up? / Q24. On an average week, how often do you wake up feeling tired?

GlobeScan

Sleep Time

Average Sleep Time Per Night, %, 2024

8 or more hours: 24%

7 hours: 36%

4 hours and less: 5%

5 hours: 10%
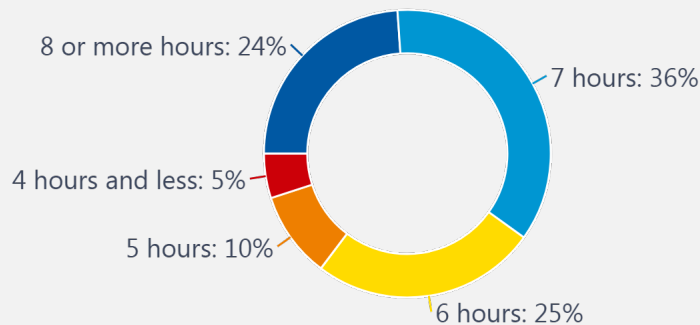
6 hours: 25%

40% sleep 6 hours or less per night

Desired Sleep Time, in Hours and Minutes, 2024

Ideally, people would like to sleep

7 hours and 60 minutes

per night

Perceptions on Whether They Are Getting Enough Sleep, %, 2024

Yes: 48%

Don't know: 7%

No: 44%
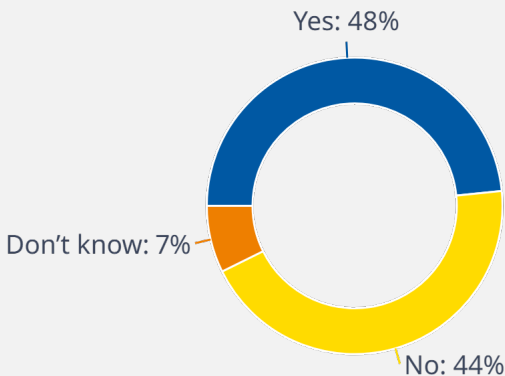
48% think this is enough sleep

Gap Between Actual and Desired Sleep Time, in Hours and Minutes, 2024

How many hours do you sleep daily?
6 hours and 38 minutes

How many hours per night would you like to sleep?
7 hours and 60 minutes

1 hour and 21 minute gap
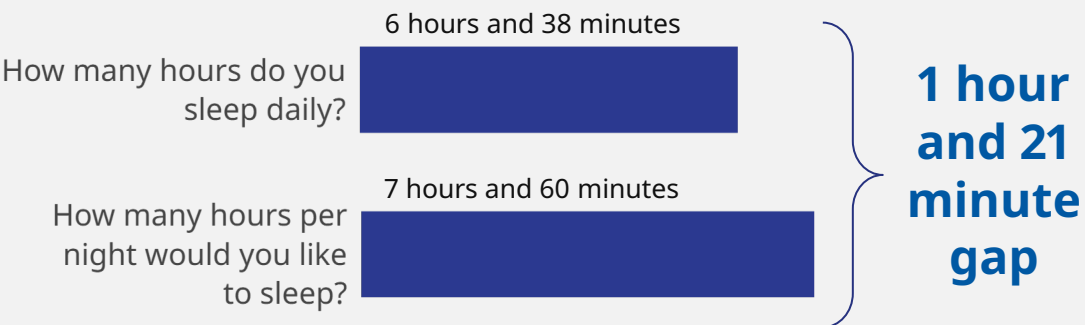
Q17. On an average week, how many hours do you sleep daily?

Q18. Do you think that is enough sleep? *Please note that Q18 was not asked in Estonia. This chart will show as blank when filtered for this market.*

Q21. Ideally, how many hours per night would you like to sleep?

GlobeScan

Barriers to Good Sleep

Barriers to Good Sleep, Top 20 Codes, Open Ended, %, 2024

Barrier	%
Feeling stressed	18%
Anxiety disorder	16%
Pain/Chronic pain	12%
Thinking/Overthinking	8%
Noise/Snoring/Air alarm	6%
Insomnia/Sleep disorder	6%
Medical conditions/diseases	6%
Work stress	5%
Always sleep deprived	5%
Children/Baby	5%
Sleep latency	4%
Temperature/Heat	3%
Depression/Sadness/Loneliness	2%
Shift work	2%
Financial problems/Poverty	2%
Sleep environment	2%
Phone/Video games/TV	2%
Frequent urination	2%
Relationship issues	2%
Sleep apnea	2%

"I have to pee a few times a night and then have hard time falling asleep again."

"Waking up to pee and then have trouble falling back asleep. Currently sleeping on a bad mattress in the living room due to renovations in the house. Kids and cats and mosquitoes wake me up."

"The temperature is too high in the room where I sleep; the noise that I can still hear despite my earplugs; difficult digestion because of the acidic foods that I ate."

"Noise from Brussels airport."

Q13. What is preventing you from getting better sleep?

GlobeScan

Enablers of Good Sleep

Enablers of Good Sleep, Top 20 Codes, Open Ended, %, 2024

Code	%
Regular bed/Wake up times	12%
Calmness/Relaxation	9%
Comfortable bed/bedding	7%
Undisturbed sleep	7%
Reduce noise	7%
Being stress free	6%
Medication	6%
Exercise	5%
Amount of light	4%
Tiredness	4%
Eat well/Good diet	3%
Temperature	3%
Fresh air	3%
Healthy lifestyle	2%
Peace of mind/Clear conscience	2%
Reading	2%
Listening to music or audio	2%
Low disturbance	2%
Daily activities	1%
Watching TV	1%
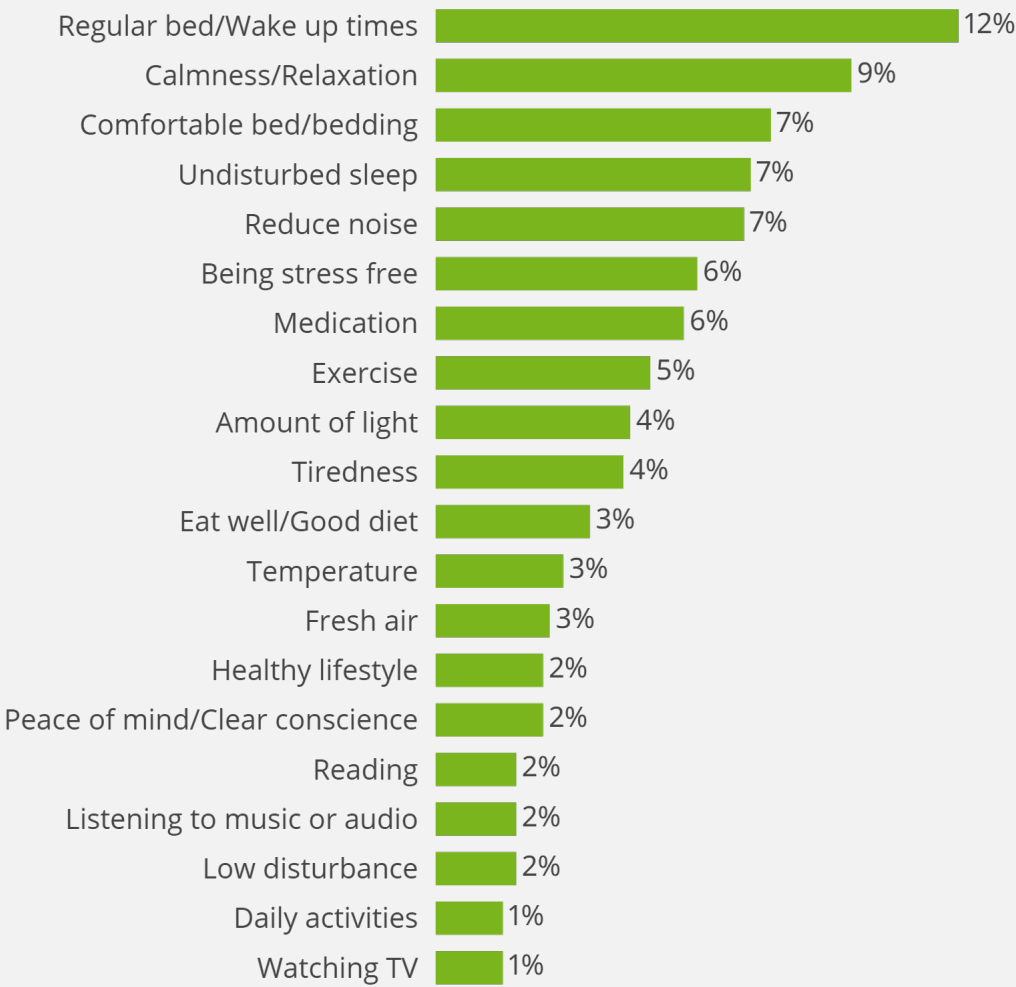
"I always go to bed quite late so that I am tired enough and I also drink a glass of wine, which helps me sleep well. I also do gymnastics during the day and go for walks often."

"No coffee after 5 o'clock; don't eat much after 6 o'clock; go to sleep 10 o'clock; get up at 6 o'clock."

"Go to bed at a regular time; light meal and no alcohol; coffee in the evening; dark and cool room. Positive thoughts for the next day."

"Unfortunately, a mixture of sleeping pills and anti-anxiety drugs."

Q14. What helps you get satisfactory sleep?
Q15. What helps you get good sleep?

GlobeScan

Section 2:

The Sleep Index

Methodology: The Sleep Index

The Sleep Index has been created using response data from different questions. It comprises **5 dimensions**: Sleep quality, Sleep time, Drift-off time, Sleep flow and Wake-up state.
The sum of the mean scores of the sub-indices build that index. The higher the index score, the higher quality of sleep. The indices range from 0 to 100 and sub-indices from 0 to 20.

The Sleep Index

Sleep Quality	Sleep Time	Drift-off Time	Sleep Flow	Wake-up State

Q12. Thinking about the past few weeks, how would you rate your sleep quality ?

Mean score:
5-pts scale from 1. "Very poor" to 5. "Very good".

Q17. On an average week, how many hours do you sleep daily?

Mean score (flipped scale):
5-pts scale from 1. "8 or more hours" to 5. "4 hours or less".

Q22. On average, how long does it take you to fall asleep?

Mean score (flipped scale):
5-pts scale from 1. "< 15 minutes" to 5. "More than 60 minutes".

Q23. During your average sleep, how often do you wake up?

Mean score (flipped scale):
5-pts scale from 1. "Never" to 5. "Four times or more".

Q24. On an average week, how often do you wake up feeling tired?

Mean score (flipped scale):
5-pts scale from 1 "Never" to 5 "Every day".

GlobeScan

The Sleep Index: Global and Market Total

Sleep Index, Global and Market, Average out of 100, 2024

Global Sleep Index Score: **63**

Market Sleep Index Score: **59**

Sleep Index Sub Indices, Market, Average out of 20, 2024

Sleep Quality	Sleep Time	Drift-off Time	Sleep Flow	Wake-up State
10	**13**	**13**	**11**	**12**

Scale for sub-indices:

0-4 / 20	5-9 / 20	10-14 / 20	15-20 / 20
Very low rating	Low rating	Good rating	Very good rating

Q12. Thinking about the past few weeks, how would you rate your sleep quality? / Q22. On average, how long does it take you to fall asleep? / Q23. During your average sleep, how often do you wake up? / Q24. On an average week, how often do you wake up feeling tired? / Q17. On an average week, how many hours do you sleep daily?

GlobeScan

The Sleep Index: Market vs Region Summary Table

Sleep Index and Sub-Indices, Global, Region and Market, 2024

	Global	Region	Market
Sleep Index Score *Average out of 100*	63	62	59
Sleep Quality	11	11	10
Sleep Time	13	13	13
Drift-off Time	14	14	13
Sleep Flow	12	12	11
Wake-up State	12	12	12

All sub-indices are an average out of 20

Q12. Thinking about the past few weeks, how would you rate your sleep quality? / Q22. On average, how long does it take you to fall asleep? / Q23. During your average sleep, how often do you wake up? / Q24. On an average week, how often do you wake up feeling tired? / Q17. On an average week, how many hours do you sleep daily?

GlobeScan

The Sleep Index: Vulnerable Groups

Sleep Index, by Vulnerable Group, Average, 2024

Group	Score
Market Sleep Index Score	59
Ethnic minorities	52
Women with young children	54
LGBTQ+ minorities	58
People with disabilities	52
Financially insecure	48
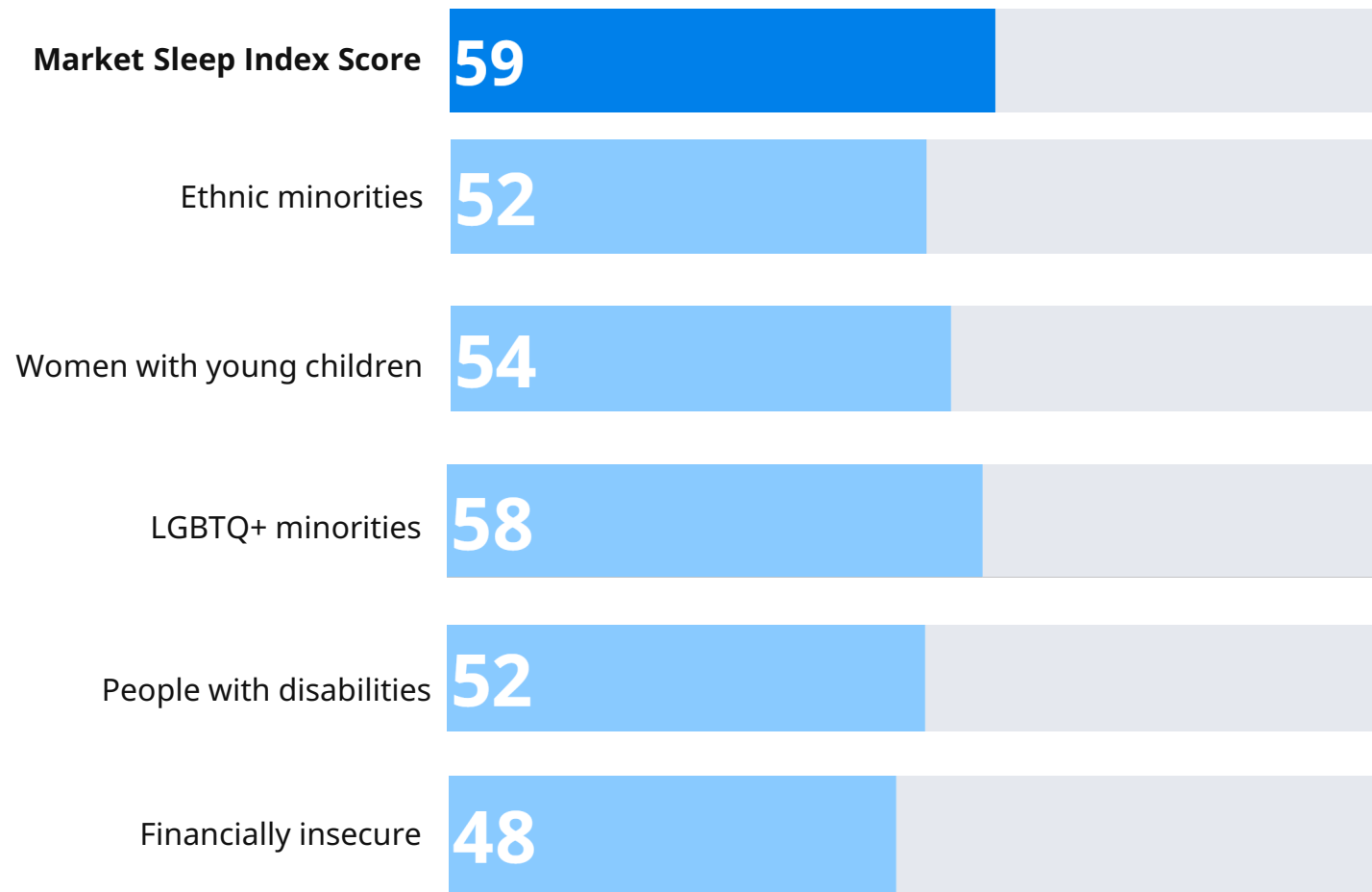
Sleep Index, by Gender, Average, 2024

Gender	Score
Female	54
Male	64

Q12. Thinking about the past few weeks, how would you rate your sleep quality? / Q22. On average, how long does it take you to fall asleep? / Q23. During your average sleep, how often do you wake up? / Q24. On an average week, how often do you wake up feeling tired? / Q17. On an average week, how many hours do you sleep daily?

GlobeScan

The Sleep Index: by Demographics

Sleep Index, by Demographics, Average, 2024

Gender

Female	54
Male	64
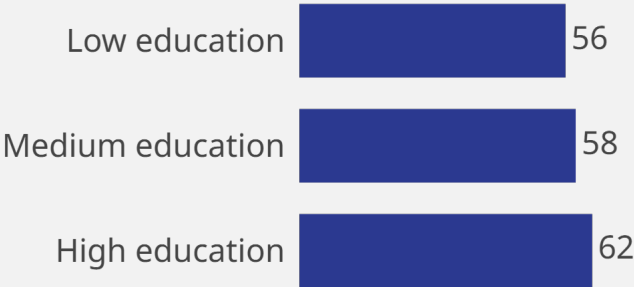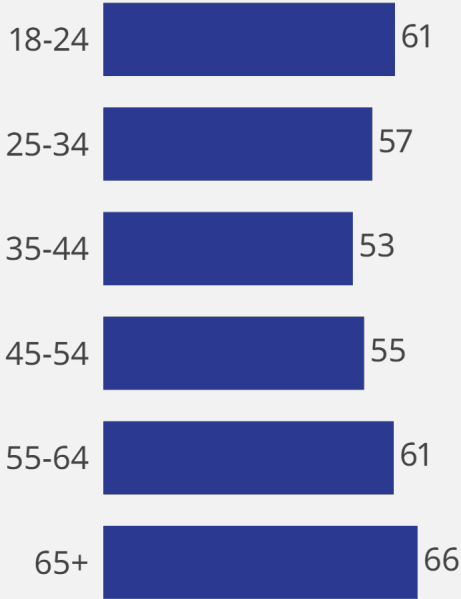
Income Levels

Low Income	54
Middle Income	60
High Income	62

Formal Education

Low education	56
Medium education	58
High education	62

Age

18-24	61
25-34	57
35-44	53
45-54	55
55-64	61
65+	66

Q12. Thinking about the past few weeks, how would you rate your sleep quality? / Q22. On average, how long does it take you to fall asleep? / Q23. During your average sleep, how often do you wake up? / Q24. On an average week, how often do you wake up feeling tired? / Q17. On an average week, how many hours do you sleep daily?

GlobeScan

Section 3:

Bedtime Rituals

GlobeScan

Bed and Wake-up Times

Bed Time vs Wake-up Time, Mode, 2024

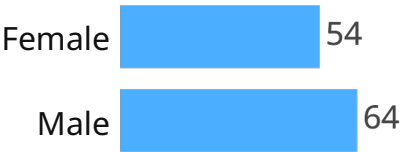**The most common time people go to bed is**

23:00

The most common time people wake up is

7:00

Amount of Time Spent in Bed Per Night, Market and Global Average, in Hours, 2024

Market 7.9 hours
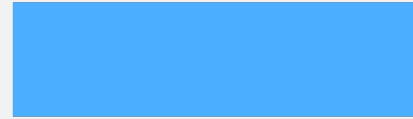
Global 8.0 hours

Q19/Q20. What time do you normally go to bed / wake up?

Notes: 00:00 refers to midnight on the 24-hour clock; Those with a negative difference (in hours) between Q19 (Bedtime) and Q20 (Wake-up time) were excluded from this question's sample.

GlobeScan

Bedtime Routines

Last Three Routines before Sleep, Open-ended, %, 2024

Q30. Can you describe the last three things you do before you go to sleep?

Wake-up Routines

First Three Routines When Waking up, Open-ended, %, 2024

Take medicine • Change clothes • Read • Get fresh air • Relax • Wash body • Open windows • Drink coffee • Check weight • Housework • Sit down • Check phone • Turn on light • Stay in bed • Work • Take care of children • Wash face • Check weather • Drink water • Eye drops • Turn on audio • Feed children • Turn off alarm • Vitamins & supplements • Open curtains • Think • Internet browsing • Go for a walk • Meditation • Watch TV • Go to the bathroom • Study • Walk dog • Go back to sleep • Open door • Water plants • Wake up / yawn • Check emails/messages • Pet care • Turn on computer • Smoke • Check the time • Lunch • Stretch • Wake up children • Drink (other than water) • Check the news • Drink tea • Take a bath • Brush teeth • Listen to music • Shave • Breakfast • Go to work • Glasses / contact lenses • Plan the day • Exercise • Make bed • Get out of bed • Shower • Haircare • Skincare • Social media • General hygiene • Interact with partner • Play games • Pray / religious rituals • Yoga • Put on make up • Health check e.g. blood pressure

Q30B. Can you describe the first three things you do when you wake up in the morning?

GlobeScan

Bedtime and Wake-up Routines

Last Three Routines Before Sleep, Verbatims, 2024

"Take my sleeping pill."

"I'm going out for quarter of an hour to get some air."

"Letting dogs outside for a while."

"I turn off my phone, read my book, then turn off the light."

"Drink some water, read a chapter of a book and pray."

"Brushing teeth, checking cell phone, getting everything ready for tomorrow."

"Drink a glass of water and go to the toilet and let the dog outside for a while."

First Three Routines When Waking up, Verbatims, 2024

"Pull up the roller shutter."

"My first job is to turn on my laptop."

"Take my glasses then I go to the bathroom. Then I make myself a coffee."

"Taking the dogs outside."

"I sit on the bed and then I sit in an armchair."

"Turn on the radio and listen to the news."

"I'm going to take a shower first, then put on face cream and deodorant. Then I'm going downstairs and have breakfast."

Q30. Can you describe the last three things you do before you go to sleep / Can you describe the first three things you do when you wake up in the morning?

GlobeScan

Napping Habits

Frequency of Naps, All Who Take Naps, %, 2024

Infrequent nappers: 40%

Frequent nappers: 17%

Never nap: 43%
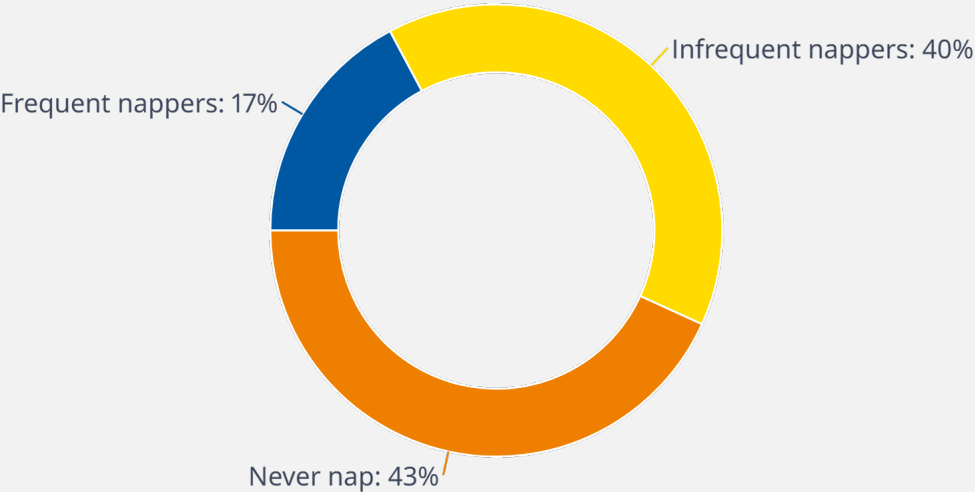
57% **Sometimes take naps**

Nap Duration, All Who Take Naps, %, 2024

- Under 10 minutes: 3%
- 10–15 minutes: 13%
- 15–30 minutes: 34%
- 30 minutes to 1 hour: 36%
- More than 1 hour: 14%
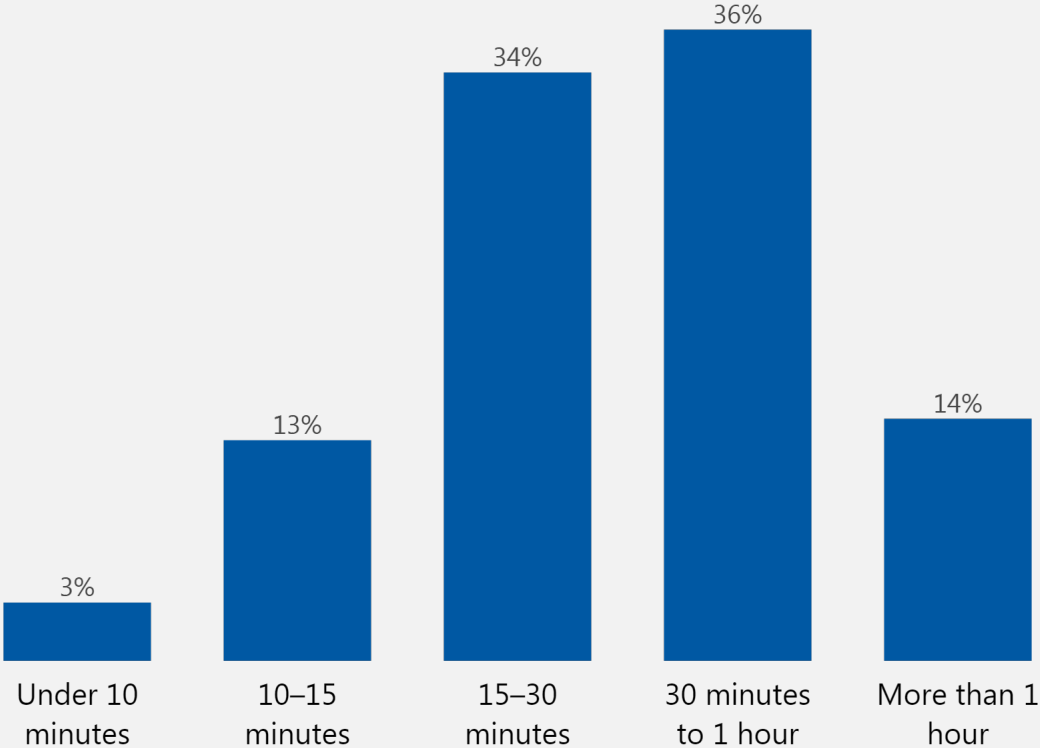
34 minutes
is the average duration of a nap

Q27. How often do you take naps during the day?

Q28. How long is your normal nap? (Subsample: among those who take naps, n=568)

GlobeScan

Section 4:

Sleep Habits

Globe
Scan

Sleep Partners

Frequency of Sleeping Alone, %, 2024

- Always: 45%
- Sometimes: 10%
- Rarely: 20%
- Never: 25%
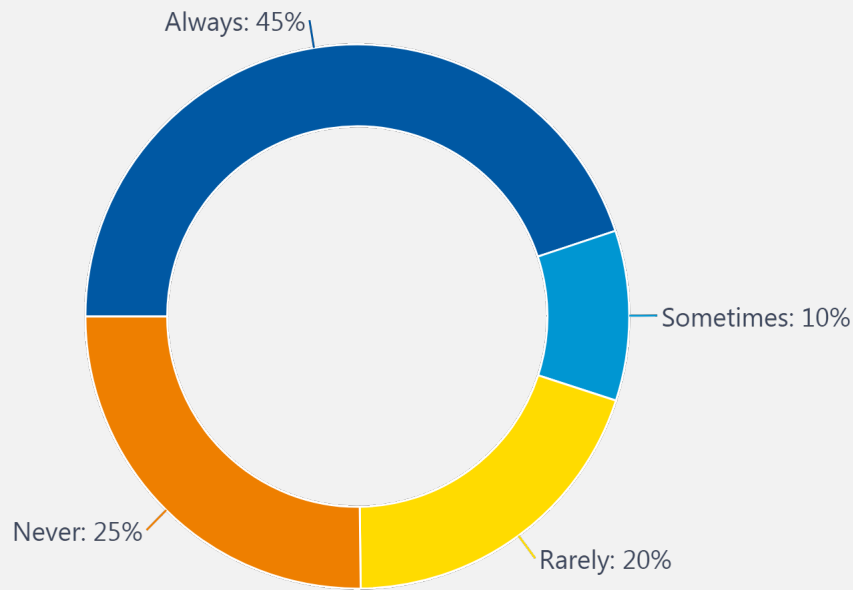
45% **rarely or never sleep alone**

Number of People Sharing a Bed, %, 2024

- 1 - I sleep alone: 48%
- 2: 49%
- 3 people or more: 3%
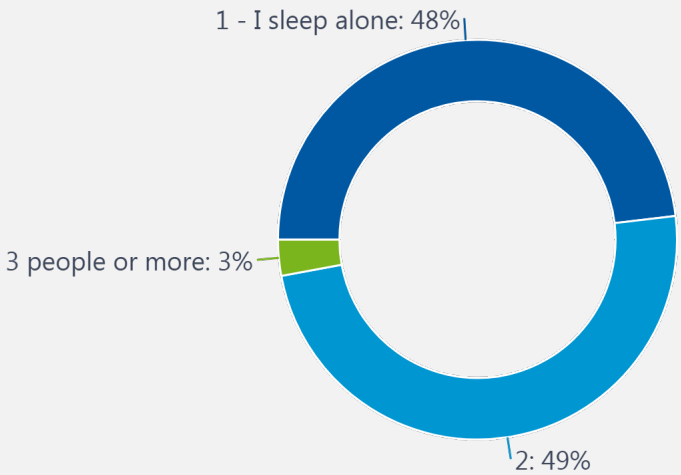
Usual Sleeping Partners, %, 2024

Partner	Child/children	Sibling(s)	Parent(s)	Pet(s)	Roommate(s)
93%	5%	1%	1%	1%	1%
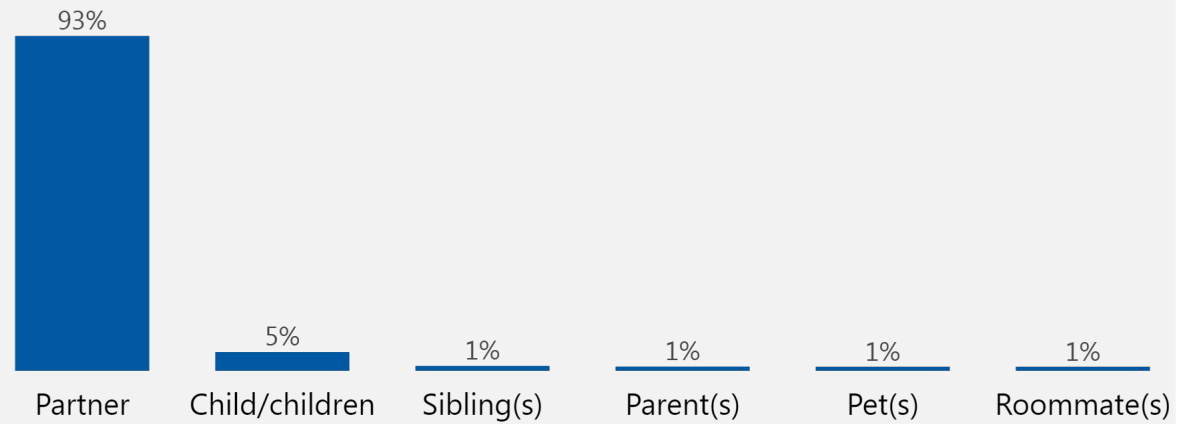
Q33. How often do you sleep alone in the bed you usually sleep in? / Q34. How many people, including yourself, typically sleep in the bed you usually sleep in?

Q35. Who do you usually share the bed you sleep in with? (among those who typically share their bed, n=519)

GlobeScan

Sleep Positions

Predominant Sleeping Positions / Predominant Sleep Positions for Couples, All Who Share a Bed With Their Partner, %, 2024

Sleeping Positions

12% sleep on their back

14% sleep on their stomach

23% sleep on their side with legs stretched out

50% sleep on their side with legs tucked up
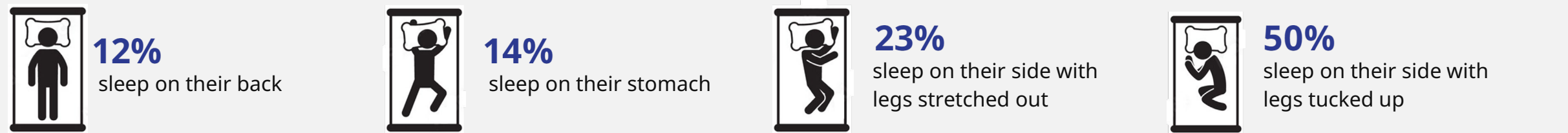
Sleeping Positions with Partners

6% sleep face to face

43% sleep back to back

13% sleep cuddling

38% sleep in no particular pattern

Q36. What is your predominant body position when you sleep?

Q37. If you share your bed with a partner, how do you usually sleep? (subsample: those who share a bed with their partner, n=484)

GlobeScan

Bed Behaviours

Sleep Behaviour: Bed Space Occupancy, %, 2024

I tend to take over the whole bed: 25%

I try to occupy as little as possible to avoid disturbances: 14%

About a half: 62%
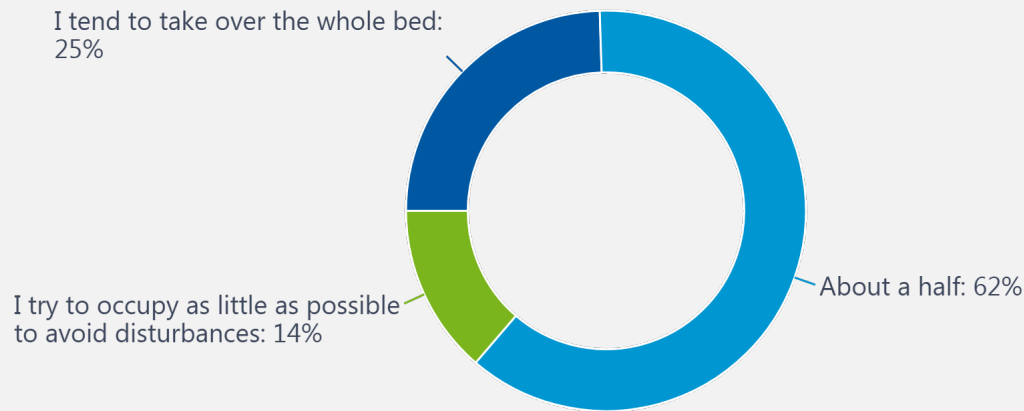
Sleep Behaviour: Movement in Sleep, %, 2024

I move around a lot: 35%

I mostly stay on one side of the bed: 23%

I move around sometimes: 42%
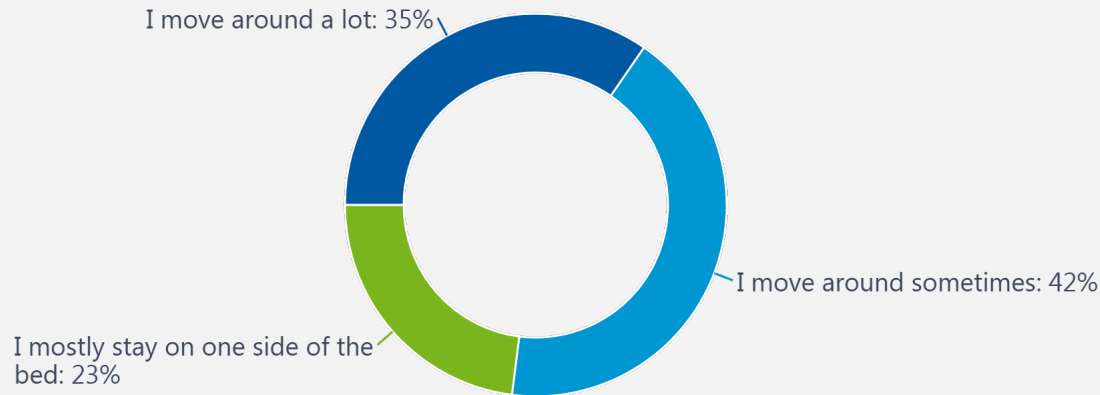
12% are **Bed Hoggers**
Those that tend to take over the whole bed and move around a lot.

27% are **Bed Companions**
Those that take over half the bed and move around sometimes.

5% are **Bed Minimalists**
Those that try to occupy as little as possible to avoid disturbances and mostly stay on one side of the bed.

Q38. How much of the bed space do you normally occupy?
Q39. How much do you normally move around in your sleep?

GlobeScan

Good Dreams vs Bad Dreams

Frequency of Having Good Dreams vs Bad Dreams / Nightmares, %, 2024

■ Every day ■ A few times a week ■ A few times a month ■ A few times a year ■ Never

Regularly have good / bad dreams

Good dreams
| 9% | 21% | 30% | 24% | 17% |

30%

Bad dreams / nightmares
| 2% | 13% | 20% | 36% | 29% |

15%

Q29. How often do you have good dreams or bad dreams / nightmares?

GlobeScan
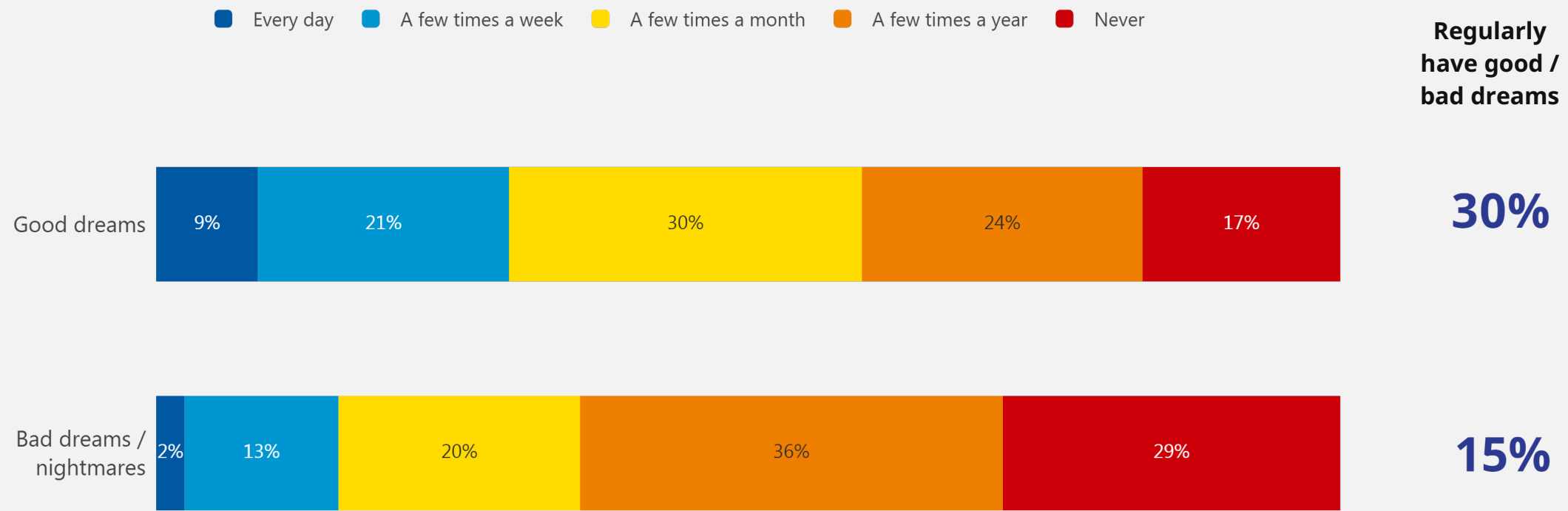
Nightmares

Frequency of Having Bad Dreams / Nightmares Regularly (Every Day / A Few Times a Week), by Demographics and Vulnerable Groups, %, 2024

Gender

- Female: 20%
- Male: 10%

Vulnerable Groups

- Ethnic minorities: 39%
- Financially insecure: 22%
- LGBTQ+ minorities: 23%
- People with disabilities: 25%
- Women with young children: 17%

Income Levels

- Low income: 20%
- Middle income: 14%
- High income: 16%

Formal Education

- Low education: 15%
- Medium education: 15%
- High education: 16%

Age

- 18-24: 19%
- 25-34: 17%
- 35-44: 19%
- 45-54: 19%
- 55-64: 11%
- 65+: 10%

Q29. How often do you have good dreams or bad dreams/nightmares?

GlobeScan

Use of Electronic Devices in the Bedroom

Electronic Device Use in the Bedroom, %, 2024

	Total	Female	Male	18-24	25-34	35-44	45-54	55-64	65+	Low income	Middle income	High income
Phone	57%	65%	49%	84%	83%	65%	67%	36%	29%	63%	54%	60%
TV	23%	24%	23%	23%	27%	28%	26%	25%	14%	24%	20%	28%
Laptop/iPad	18%	21%	15%	52%	32%	16%	12%	7%	6%	22%	14%	21%
Alarm clock	40%	32%	47%	21%	19%	26%	39%	58%	59%	29%	44%	44%

Gender | **Age** | **Income**

Q42. Which of the following devices do you use in your bedroom / where you usually sleep?

GlobeScan

Use of Sleep Aids for Better Sleep

Frequency of Using Sleep Medication for Better Sleep, %, 2024

81% — **Never** use medications for better sleep

19% — **Regularly** use medications for better sleep

8% Use medication **every day**
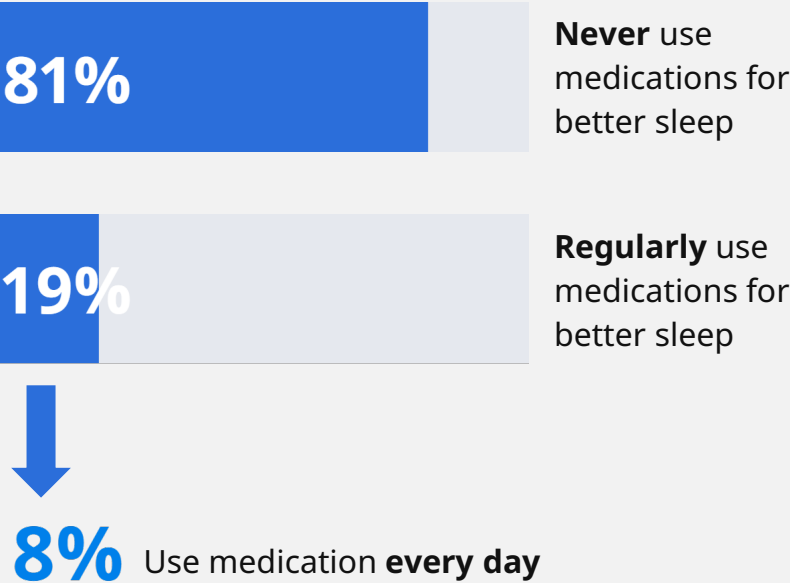
Use of Other Sleep Aids for Better Sleep, Open Ended, %, 2024

■ Medical aids   ■ Tech/device aids   ■ Temperature control   ■ Other aids

Category	%
Black-out curtains / blinds	23%
Book	13%
Music/podcasts/audiobooks	10%
Earplugs	10%
Dietary supplements or soothing drink	8%
Specialty mattress/pillow	8%
Air conditioning/fan	7%
Sleep mask	7%
Aromatherapy	4%
Bedding with cooling or heating features	4%
White noise	3%
Alcoholic drink	3%
Wellness/meditation apps	3%
Sleep tracking devices/apps	3%
Portable heater	2%
Other	3%
None of these	44%

Q25. On an average week, how often do you take sleep medications to get a better sleep?
Q26. Is there anything else you use to get a better sleep?

33

GlobeScan

Section 5:

Beds and Bedrooms

GlobeScan

Beds and Bedrooms

Type of Room for Sleeping, %, 2024

Room	%
Bedroom	93%
Living room	5%
Guest room	1%
Child's room	0%
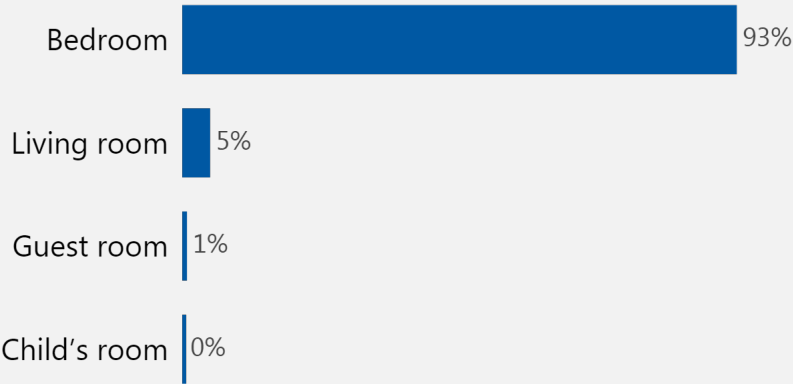
Type of Bed People Sleep In, %, 2024

Bed type	%
Queen-sized bed	55%
King-sized bed	24%
Single bed	13%
Sofa	2%
Sofa bed	1%
Bunk bed	1%
Mattress on the floor	1%
Air mattress	0%
Other (different bed size dimensions)	4%

Q31. Where do you usually sleep in your home/place of residence?
Q40. What type of bed do you sleep in?

35

GlobeScan
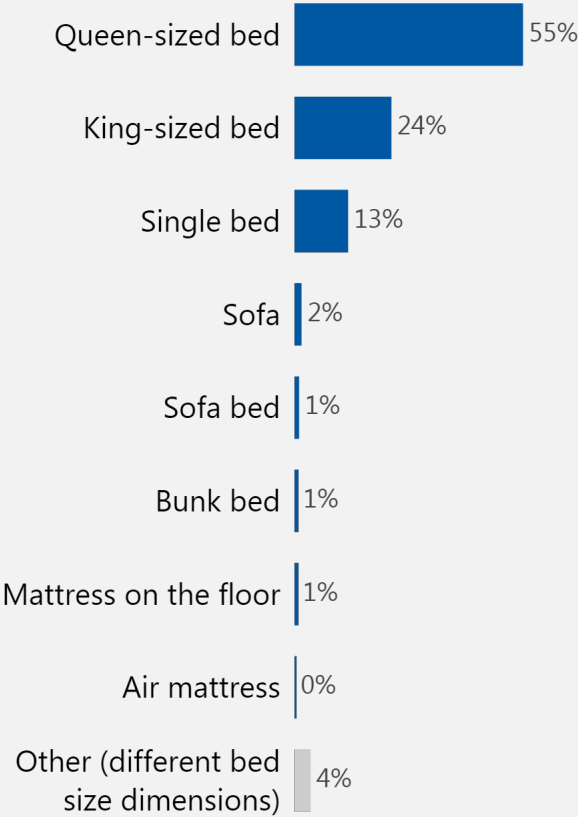
Satisfaction with Different Bedroom Items

Levels of Satisfaction with Bedroom Items, %, 2024

Legend:
- Completely satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Completely dissatisfied
- Not applicable

Item	Completely satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Completely dissatisfied	Not applicable	Completely/ Somewhat Satisfied (4+5)	Completely/ Somewhat Dissatisfied (4+5)
Bedding	43%	41%	11%	4%	1%		84%	5%
Bed	42%	40%	10%	5%	3%		82%	7%
Mattress	40%	39%	11%	6%	3%		79%	9%
Pillows	36%	42%	13%	7%	2%		78%	8%
Sleepwear	41%	37%	10%	3%	1%	9%	78%	3%
Air quality	36%	42%	15%	5%	2%		78%	7%
Curtains/shades	41%	35%	12%	6%	2%	3%	76%	8%
Temperature	32%	42%	17%	7%	1%		74%	8%
Organisation/storage	37%	36%	14%	7%	4%	2%	73%	11%

Q41. How satisfied are you with each of the following?

GlobeScan

Impact of Room Organisation / Money on Improving Sleep Quality

Extent to Which People Think Room Organisation Impacts Their Sleep Quality, %, 2024

Strongly agree: 22%
Somewhat agree: 37%
Strongly disagree: 5%
Somewhat disagree: 8%
Neither agree nor disagree: 28%
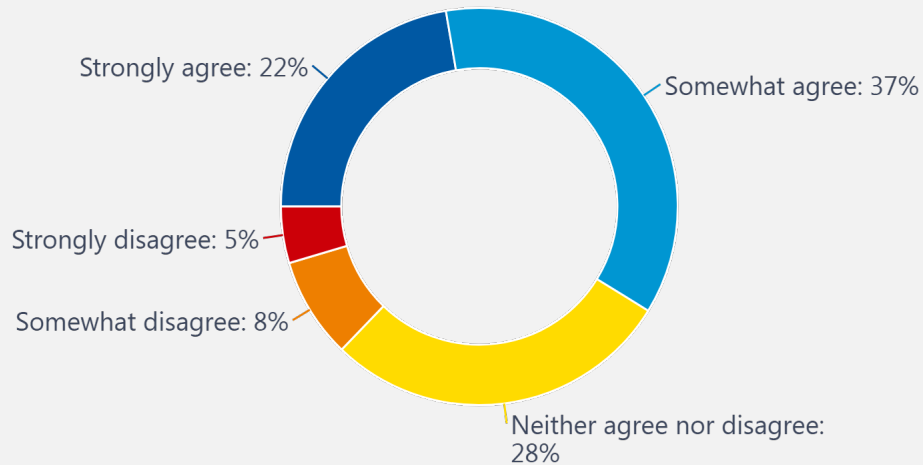
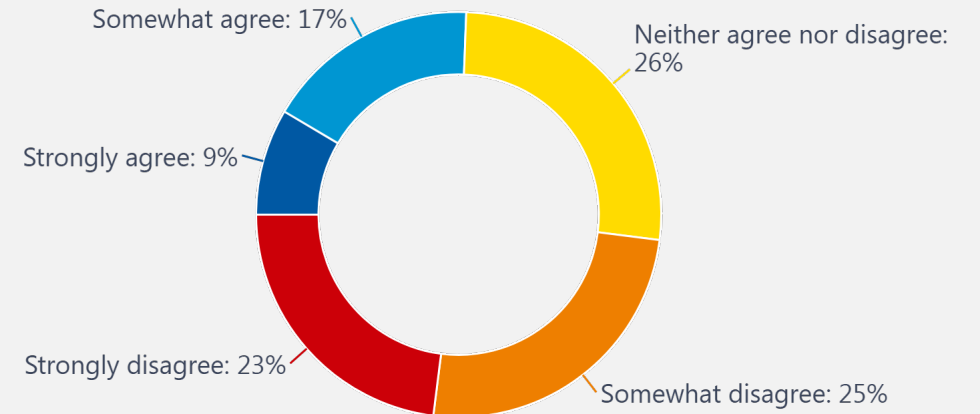**Extent to Which People Need Money to Improve Their Sleep Quality, %, 2024**

Somewhat agree: 17%
Neither agree nor disagree: 26%
Strongly agree: 9%
Strongly disagree: 23%
Somewhat disagree: 25%

Q44. To what extent do you agree or disagree with each of the following? Q44_1 – I sleep better in a room with no clutter / Q44_6 – I need more money to improve my sleep quality

GlobeScan

Methodology: Estimation of the Number of Children Conceived a Bed from IKEA

Variables used:

ESTIMATED number of years since the purchase of IKEA beds / mattresses

**Q46. Approximately how many years ago did you buy your IKEA bed/mattress?**
1. Bought current IKEA bed/mattress approximately [INSERT] years ago
2. Bought previous IKEA bed/mattress approximately [INSERT] years ago

Number of children aged under 19 years old

D9. How many children do you have in the following age groups, if any?
- Only select an answer for the age groups relevant to you: 0-1 years; 2-3 years; 4-6 years; 7-9 years; 10-12 years; 13-15 years; 16-18 years;
- Then, select the number of children per age group: 1; 2; 3; 4+
- Or: All my children are adults (aged 19 or over); No children; I prefer not to say

% Purchased an IKEA bed (either previous bed or current bed)
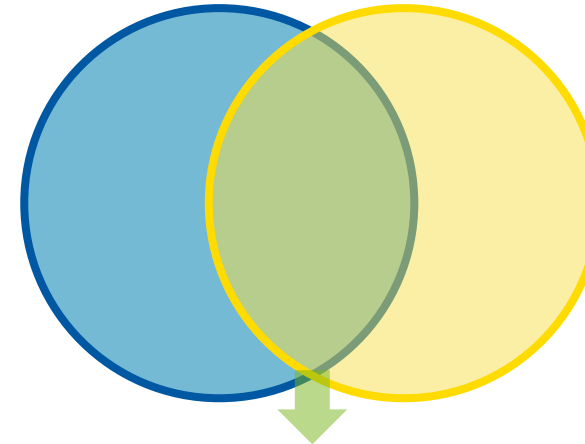
% Has children younger than 19 years old

% Children conceived in a bed from IKEA
If number of years bought IKEA bed/mattress equal or > than the children's age

Interpretation of the results:

Number of children conceived in a bed from IKEA is an estimate, based on these assumptions:
- If a respondent has children younger than 19;
- And this respondent also owns/owned an IKEA bed (either previous bed or current bed)
- And the number of years since the purchase is equal or older than their children's age;

We conclude that their child/children may have been conceived in an IKEA bed.

GlobeScan

Number of Children Conceived in a Bed from IKEA

Number of Children Conceived in a Bed or Mattress from IKEA, Global, Region and Market, %, 2024

Global 6%
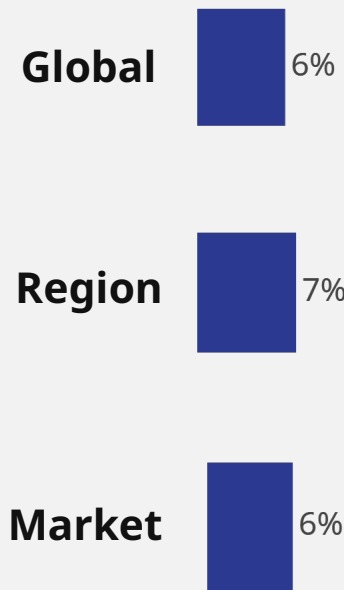
Region 7%

Market 6%

Please consider the following when interpreting the data:
- The data presented in this slide is based on the online population in each market.
- The purchase of IKEA furniture, such as beds and mattresses, may be overstated in some regions/countries.

D9. How many children do you have in the following age groups, if any?
Q45. Thinking of where you sleep, have you ever owned a bed / mattress from the retailer IKEA?

GlobeScan

Section 6:

Sleep Attitudes

GlobeScan

Sleep Lovers

34% identify as **Sleep Lovers**

Those who agree that they prefer sleep over a social activity and that sleep is one of the best joys of life.

Extent to Which People Prefer a Good Sleep Over a Social Activity, %, 2024

Somewhat agree: 33%

Strongly agree: 16%

Strongly disagree: 4%

Somewhat disagree: 11%

Neither agree nor disagree: 36%

Extent to Which People Think Sleep Is One of the Best Joys of Life, %, 2024

Somewhat agree: 42%

Strongly agree: 15%

Strongly disagree: 3%

Somewhat disagree: 8%

Neither agree nor disagree: 33%

Q44. To what extent do you agree or disagree with each of the following? Q44_4 – I prefer a good sleep over a social activity / Q44_3 – Sleep is one of the best joys in life

GlobeScan
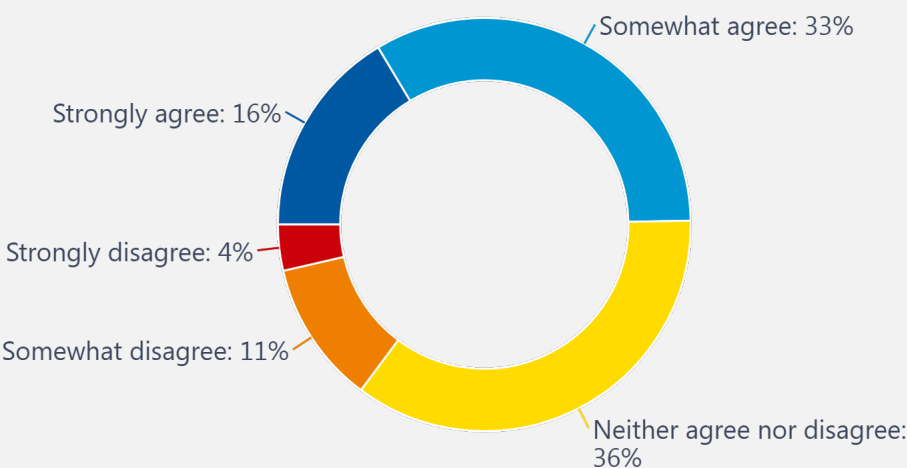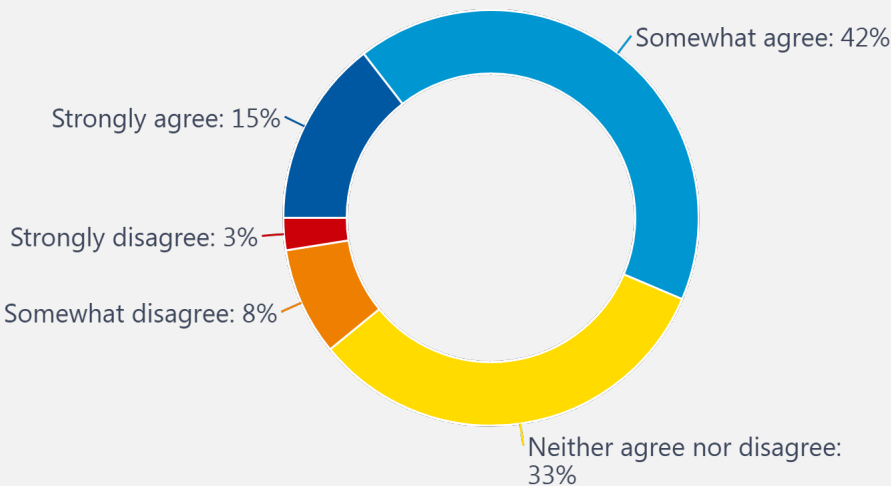
Sleep Lovers by Demographics

Extent to Which People Prefer a Good Sleep over a Social Activity, Strongly/Somewhat Agree (Codes 4+5), by Demographics, %, 2024
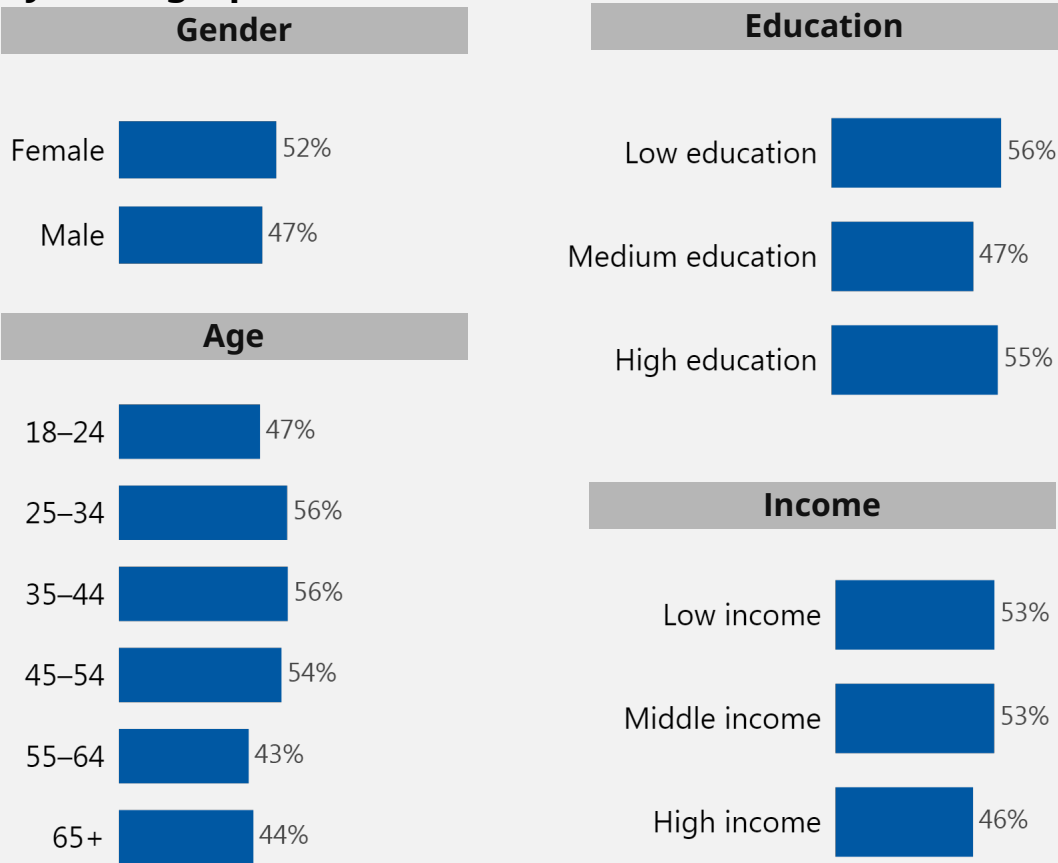
Extent to Which People Think Sleep Is One of the Best Joys of Life, Strongly/Somewhat Agree (Codes 4+5), by Demographics, %, 2024

Gender (left panel)
- Female 52%
- Male 47%

Age (left panel)
- 18–24 47%
- 25–34 56%
- 35–44 56%
- 45–54 54%
- 55–64 43%
- 65+ 44%

Education (left panel)
- Low education 56%
- Medium education 47%
- High education 55%

Income (left panel)
- Low income 53%
- Middle income 53%
- High income 46%

Gender (right panel)
- Female 57%
- Male 55%

Age (right panel)
- 18–24 60%
- 25–34 67%
- 35–44 56%
- 45–54 57%
- 55–64 50%
- 65+ 51%

Education (right panel)
- Low education 56%
- Medium education 54%
- High education 61%

Income (right panel)
- Low income 55%
- Middle income 54%
- High income 60%

Q44. To what extent do you agree or disagree with each of the following? Q44_4 – I prefer a good sleep over a social activity / Q44_3 – Sleep is one of the best joys in life

GlobeScan

Sleep Worriers

33% identify as **Sleep Worriers**
Those who agree that people should sleep for at least 7 hours daily and who worry about the amount of sleep they get.

Extent to Which People Think We Should Sleep for At Least 7 Hours Daily, %, 2024

Strongly agree: 38%

Somewhat agree: 44%

Neither agree nor disagree: 13%

Somewhat disagree: 4%

Strongly disagree: 1%

Extent to Which People Worry about the Amount of Sleep They Get, %, 2024

Somewhat agree: 28%

Neither agree nor disagree: 31%

Somewhat disagree: 19%

Strongly disagree: 12%

Strongly agree: 10%

Q44. To what extent do you agree or disagree with each of the following? Q44_5 – We should sleep for at least 7 hours daily / Q44_8 – I often worry about the amount of sleep I get
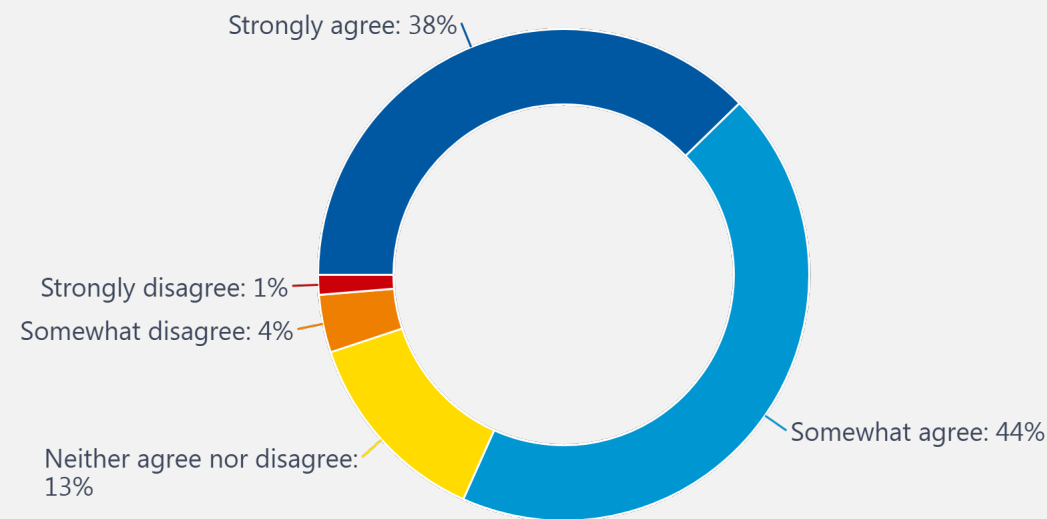
GlobeScan
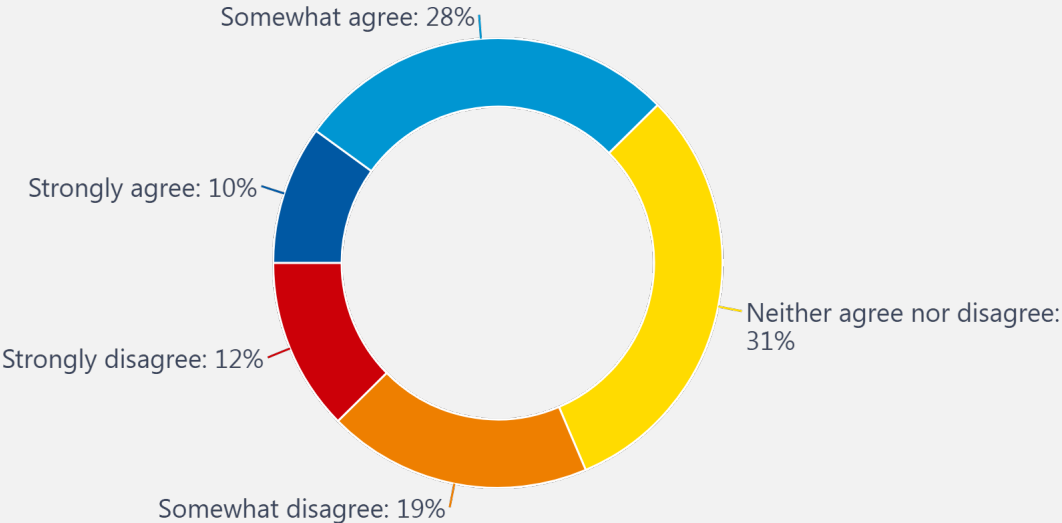
Sleep Worriers by Demographics

Extent to Which People Think We Should Sleep for At Least 7 Hours Daily, Strongly/Somewhat Agree (Codes 4+5), By Demographics, %, 2024
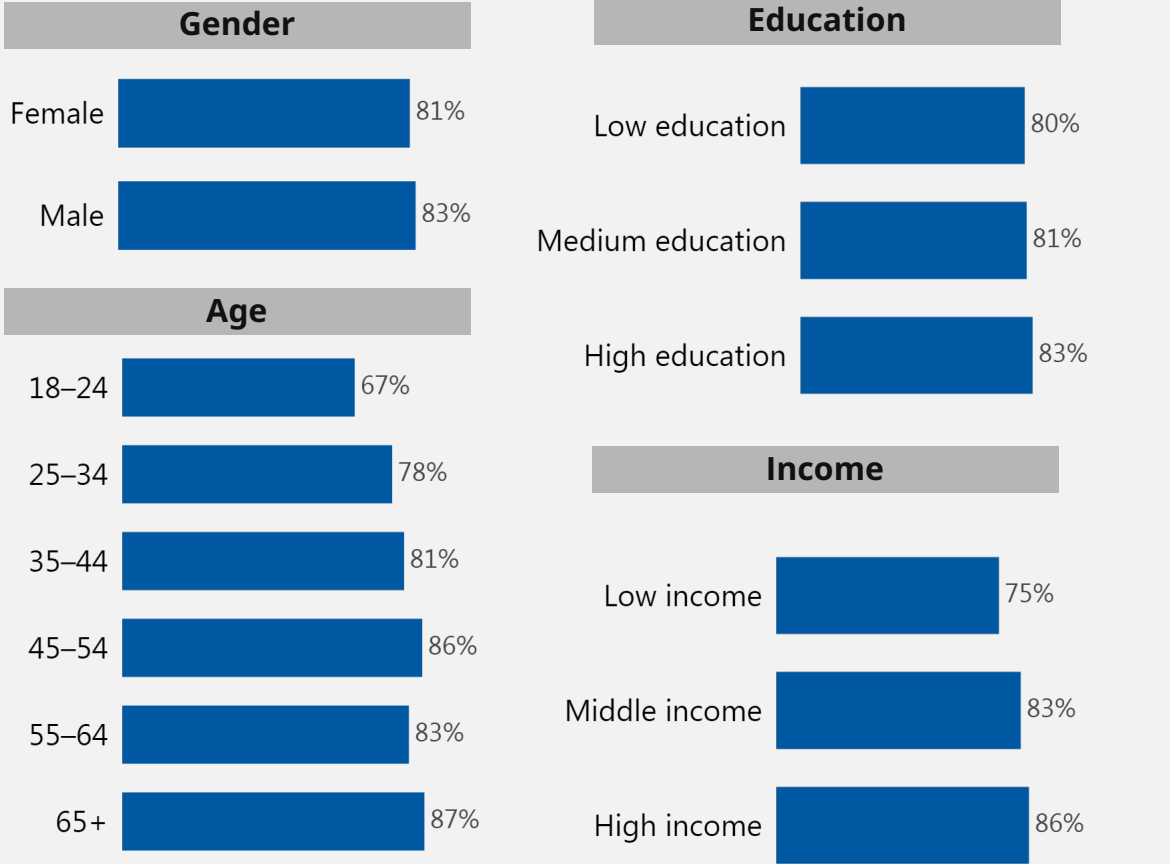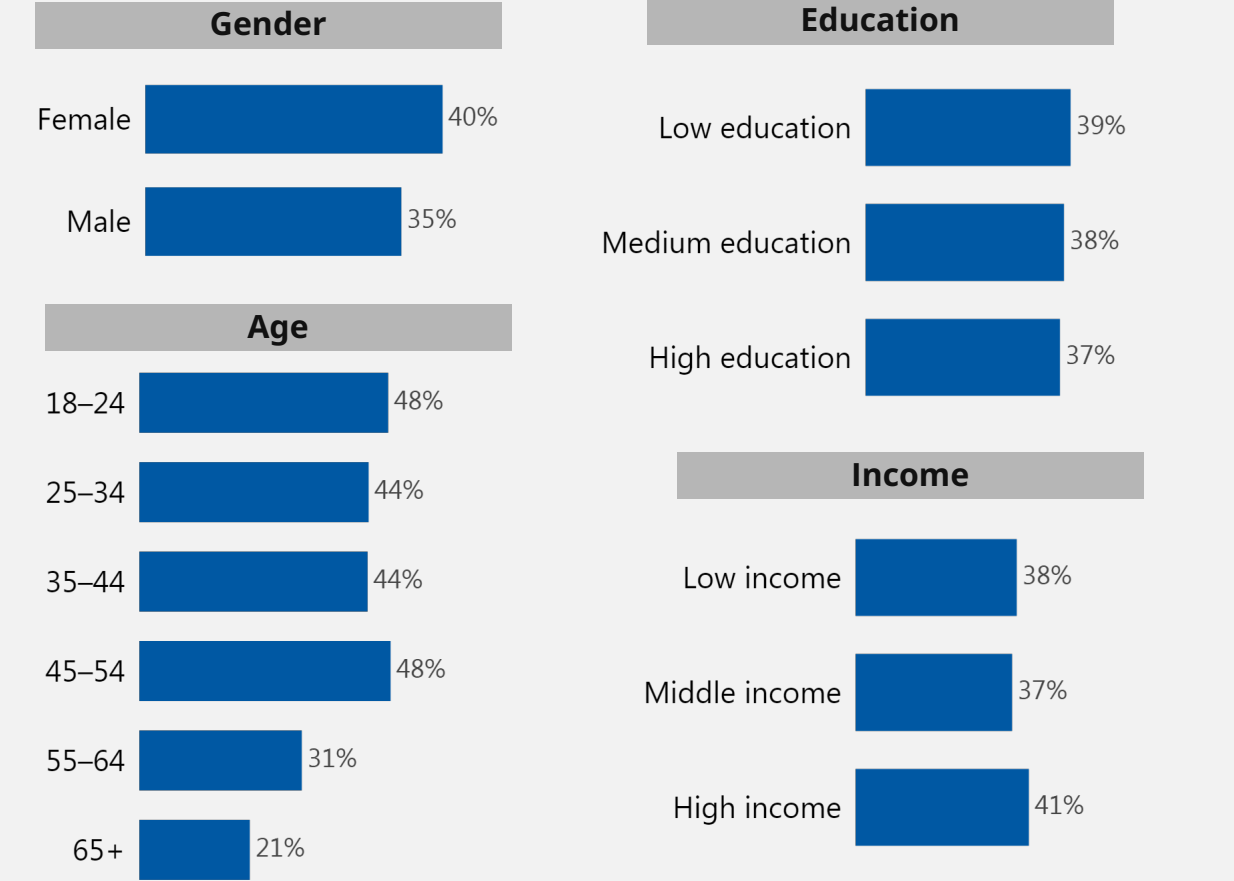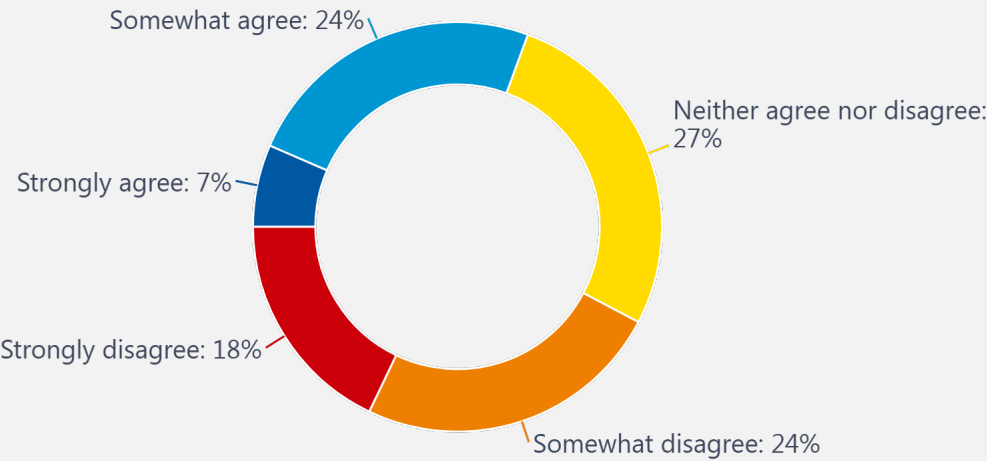
Extent to Which People Worry about the Amount of Sleep They Get, Strongly/Somewhat Agree (Codes 4+5), By Demographics, %, 2024

Gender

Female	81%
Male	83%

Age

18–24	67%
25–34	78%
35–44	81%
45–54	86%
55–64	83%
65+	87%

Education

Low education	80%
Medium education	81%
High education	83%

Income

Low income	75%
Middle income	83%
High income	86%

Gender

Female	40%
Male	35%

Age

18–24	48%
25–34	44%
35–44	44%
45–54	48%
55–64	31%
65+	21%

Education

Low education	39%
Medium education	38%
High education	37%

Income

Low income	38%
Middle income	37%
High income	41%

Q44. To what extent do you agree or disagree with each of the following? Q44_5 – We should sleep for at least 7 hours daily / Q44_8 – I often worry about the amount of sleep I get
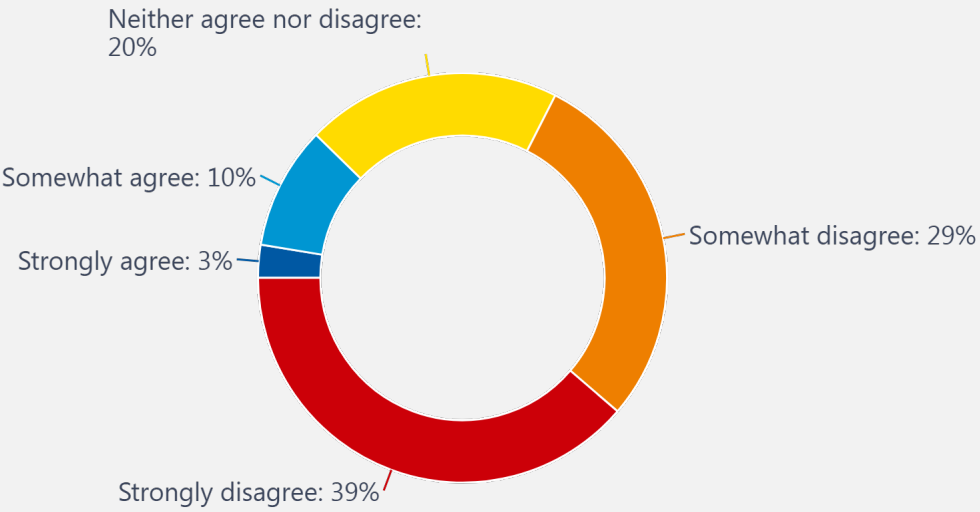
44

GlobeScan

Sleep Sceptics

8% identify as **Sleep Sceptics**
Those who agree that they think they have missed something important whenever they sleep too long and that sleep is a waste of time.

Extent to Which People Think They Have Missed Something Important Whenever They Sleep Too Long, %, 2024
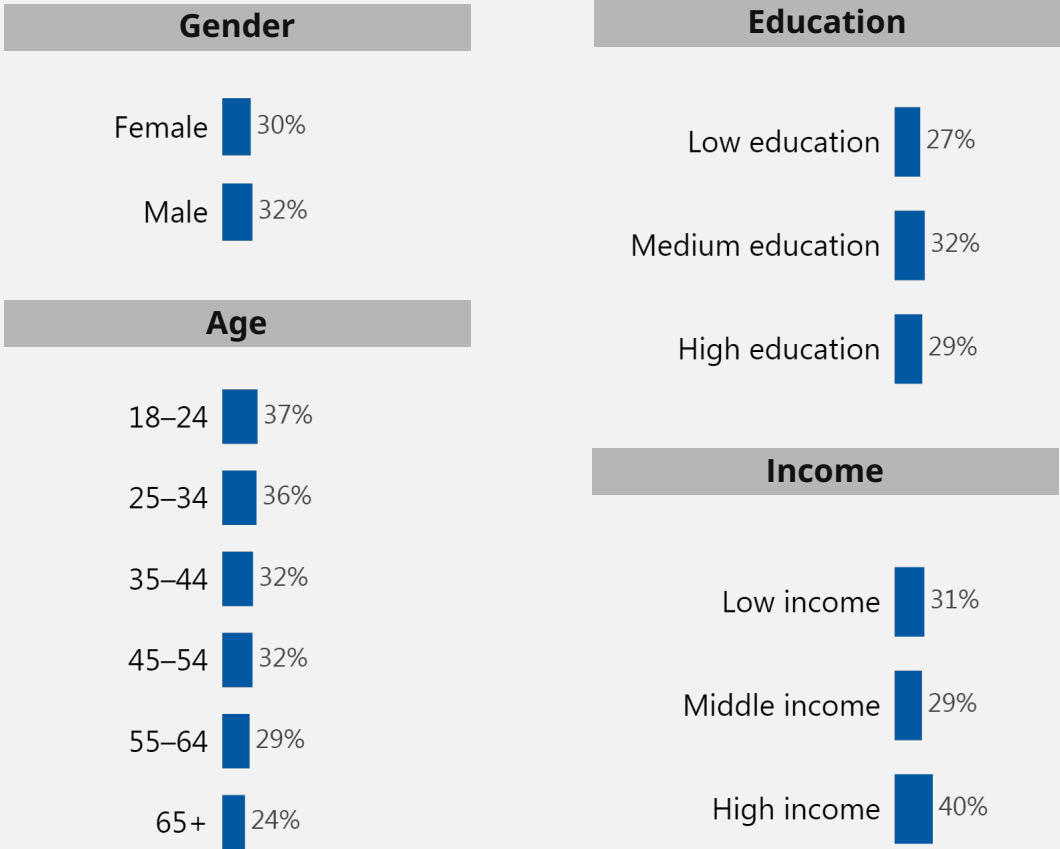
Somewhat agree: 24%

Neither agree nor disagree: 27%

Strongly agree: 7%

Strongly disagree: 18%

Somewhat disagree: 24%

Extent to Which People Think Sleeping Is a Waste of Time, %, 2024

Neither agree nor disagree: 20%

Somewhat agree: 10%

Strongly agree: 3%

Somewhat disagree: 29%

Strongly disagree: 39%

Q44. To what extent do you agree or disagree with each of the following? Q44_2 – Whenever I sleep too long, I feel that I've missed something important / Q44_7 – Sleeping is a waste of time
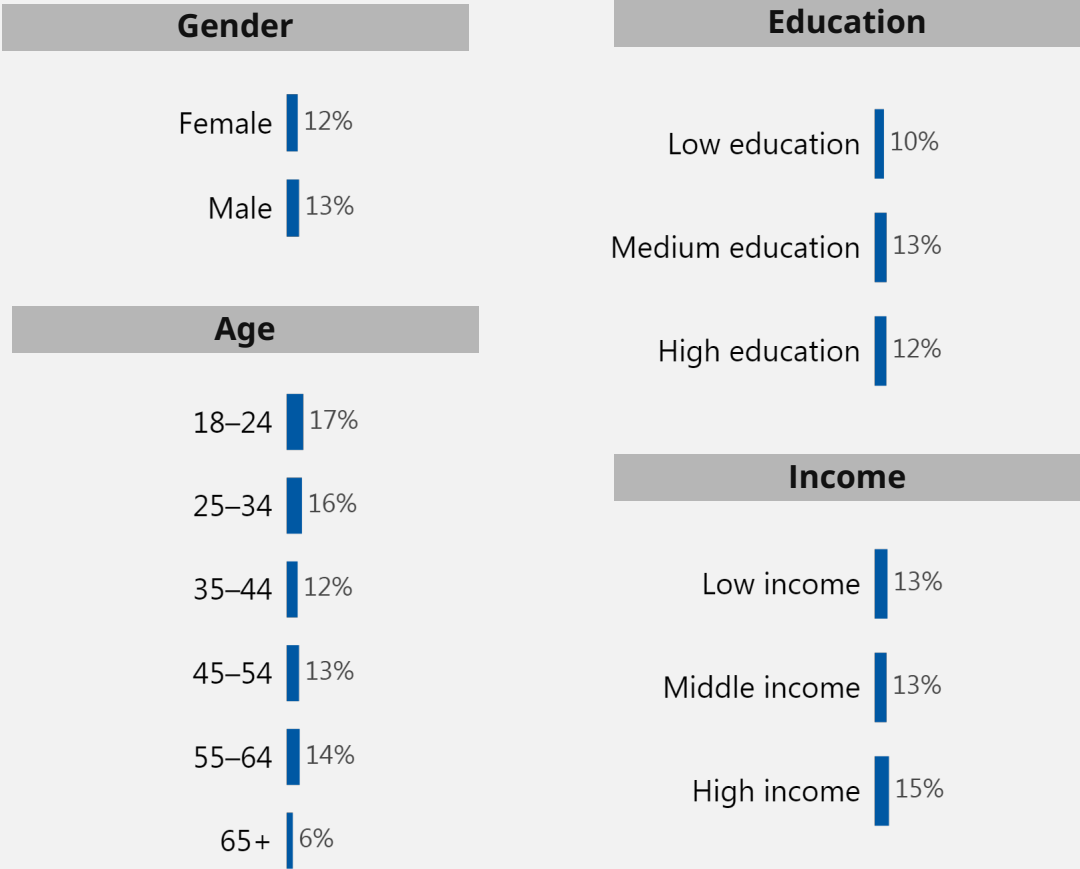
GlobeScan

Sleep Sceptics by Demographics

Extent to Which People Think They Have Missed Something Important Whenever They Sleep Too Long, Strongly/ Somewhat Agree (Codes 4+5), by Demographics %, 2024

Gender
- Female: 30%
- Male: 32%

Age
- 18–24: 37%
- 25–34: 36%
- 35–44: 32%
- 45–54: 32%
- 55–64: 29%
- 65+: 24%

Education
- Low education: 27%
- Medium education: 32%
- High education: 29%

Income
- Low income: 31%
- Middle income: 29%
- High income: 40%

Extent to Which People Think Sleeping Is a Waste of Time, Strongly/Somewhat Agree (Codes 4+5), by Demographics, %, 2024

Gender
- Female: 12%
- Male: 13%

Age
- 18–24: 17%
- 25–34: 16%
- 35–44: 12%
- 45–54: 13%
- 55–64: 14%
- 65+: 6%

Education
- Low education: 10%
- Medium education: 13%
- High education: 12%

Income
- Low income: 13%
- Middle income: 13%
- High income: 15%

Q44. To what extent do you agree or disagree with each of the following? Q44_2 – Whenever I sleep too long, I feel that I've missed something important / Q44_7 – Sleeping is a waste of time

GlobeScan

Section 7:

Sleep Factors

GlobeScan

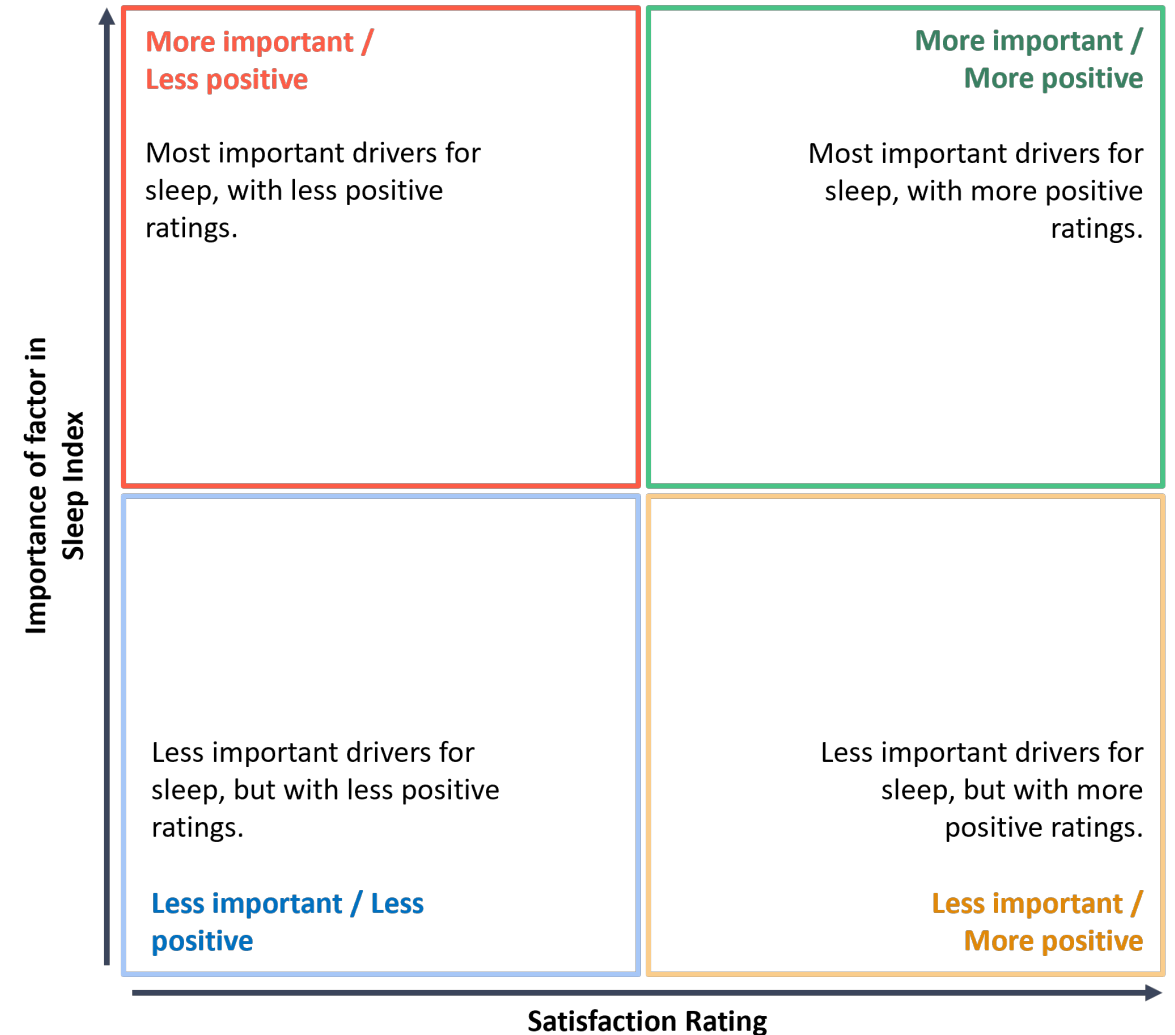# Sleep Factors: Explanation of Drivers Analysis

We analysed the data to identify the **key factors that influence people's sleep.**

Our analysis identified 27 factors that have the greatest impact on sleep index scores. These are displayed in the matrix on the next page.

The matrix on the following page plots these factors based on two dimensions: **current satisfaction level** (x-axis) and their **importance in affecting sleep** (y-axis).

While **all the factors on the matrix are important for sleep**, those in the top half (above the horizontal line) have the **most significant impact on sleep scores.**
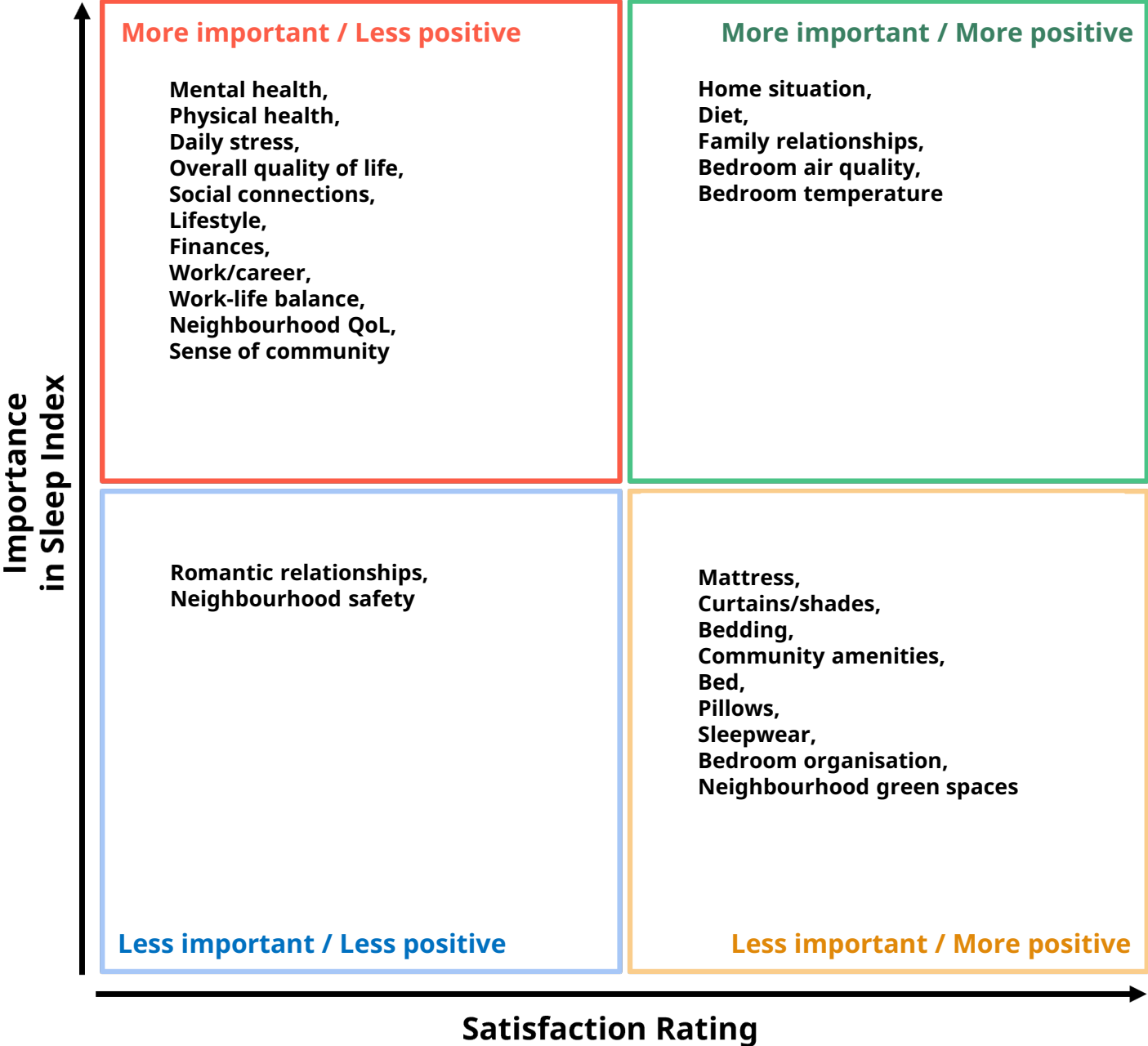
Factors on the right side of the matrix represent areas where people feel more positive, while those on the left show **areas where people feel less satisfied.** This indicates most room for improvement on the left.

More important / Less positive

Most important drivers for sleep, with less positive ratings.

More important / More positive

Most important drivers for sleep, with more positive ratings.

Less important / Less positive

Less important drivers for sleep, but with less positive ratings.

Less important / More positive

Less important drivers for sleep, but with more positive ratings.

Importance of factor in Sleep Index

Satisfaction Rating

Drivers Analysis

Key:

Bedroom
Bed
Mattress
Pillows
Curtains / shades
Bedding
Sleepwear
Bedroom air quality
Bedroom temperature
Bedroom organisation

Health
Physical health
Mental health

Lifestyle / Life Satisfaction
Overall quality of life
Lifestyle
Home situation
Diet
Finances
Daily stress

Neighbourhood
Neighbourhood safety
Neighbourhood green spaces
Community amenities
Sense of community
Neighbourhood QoL

Social Wellbeing / Relationships
Romantic relationships
Family relationships
Social connections

Work
Work / career
Work-life balance

Importance in Sleep Index (vertical axis)

Satisfaction Rating (horizontal axis)

More important / Less positive

Mental health,
Physical health,
Daily stress,
Overall quality of life,
Social connections,
Lifestyle,
Finances,
Work/career,
Work-life balance,
Neighbourhood QoL,
Sense of community

More important / More positive

Home situation,
Diet,
Family relationships,
Bedroom air quality,
Bedroom temperature

Less important / Less positive

Romantic relationships,
Neighbourhood safety

Less important / More positive

Mattress,
Curtains/shades,
Bedding,
Community amenities,
Bed,
Pillows,
Sleepwear,
Bedroom organisation,
Neighbourhood green spaces

49

GlobeScan

Appendix

Sample Breakdown by Region

Region		Countries	Sample size
Americas	North America	Canada	1,003
		USA	1,016
	Latin America	Chile	1,003
		Colombia	1,002
		Dominican Republic	301
		Mexico	1,005
APAC	APAC	Australia	1,002
		Mainland China	1,002
		Hong Kong SAR	1,001
		India	992
		Indonesia	1,002
		Japan	1,003
		Malaysia	1,008
		Philippines	1,002
		Singapore	992
		South Korea	1,003
		Taiwan	1,003
		Thailand	1,008
MENAT	Middle East	Israel	705
		Jordan	1,083
		Kuwait	1,002
		Qatar	704
		Saudi Arabia	1,007
		Türkiye	1,003
		UAE	1,002
	North Africa	Egypt	1,005
		Morocco	1,004

Region		Countries	Sample size
Europe	Central Europe	Austria	1,002
		Belgium	1,000
		Czech Republic	1,004
		Germany	1,003
		Ireland	999
		Netherlands	1,003
		Poland	1,000
		Switzerland	1,002
		UK	999
	Eastern Europe	Hungary	1,005
		Romania	1,002
		Serbia	1,001
		Slovakia	1,002
		Ukraine	1,001
	Nordics	Denmark	1,003
		Finland	1,001
		Norway	1,002
		Sweden	1,002
	Northern Europe	Estonia	1,004
		Latvia	1,004
		Lithuania	1,005
	Southern Europe	Bulgaria	1,001
		Croatia	1,004
		France	1,002
		Greece	1,001
		Italy	1,002
		Portugal	1,003
		Slovenia	1,000
		Spain	1,001
		Spanish Islands	300

GlobeScan

Sleep Factors: Questions and Labels

Topics	Labels in the matrix	Questions and attributes in the questionnaire
Bedroom	Bed	Q41_1. Your bed
	Mattress	Q41_2. Your mattress
	Pillows	Q41_3. Your pillows
	Curtains / shades	Q41_4. Curtains/shades
	Bedding	Q41_5. Your bedding
	Sleepwear	Q41_6. Your sleepwear
	Bedroom air quality	Q41_7. Air quality in your bedroom
	Bedroom temperature	Q41_8. Temperature in your bedroom
	Bedroom organisation	Q41_9. Organization / storage in your bedroom
Health	Physical health	Q47. How would rate your overall physical health? / Q7_3. Health condition
	Mental health	Q48. How would you rate your mental health?
Lifestyle / Life Satisfaction	Overall quality of life	Q7_1. Overall life satisfaction / Overall quality of life
	Lifestyle	Q7_6. Lifestyle
	Home situation	Q7_10. Home / living situation
	Diet	Q7_7. Quality and sufficiency of your diet
	Finances	Q7_8. Your financial situation
	Daily stress	Q8. How stressful is your average day?
Neighbourhood	Neighbourhood safety	Q10_1. Safety
	Neighbourhood green spaces	Q10_2. Availability of green places
	Community amenities	Q10_3. Availability of amenities like healthcare and education
	Sense of community	Q10_4. Sense of community
	Neighbourhood QoL	Q10_5. Overall quality of life
Social Wellbeing / Relationships	Romantic relationships	Q7_4. Romantic relationships
	Family relationships	Q7_9. Family relations
	Social connections	Q9. Lack social connections or feel disconnected from others
Work	Work / career	Q7_2. Work/career
	Work-life balance	Q7_5. Work-life balance

Questions and scales:

- **Q7. Please rate how satisfied you are in each of the following areas of your life** - 5-pts scale from 1. "Completely dissatisfied" to 5. "Completely satisfied".

- **Q8. How stressful is your average day**? - 5-pts scale from 1. "Not at all stressful" to 5. "Extremely stressful".

- **Q9. How often do you feel that you lack social connections or feel disconnected from others?** - 5-pts scale from 1. "Never" to 5. "Very often".

- **Q10. Thinking of where you live, how would you rate your neighbourhood on the following attributes?** - 5-pts scale from 1. "Very poor" to 5. "Very good".

- **Q41. How satisfied are you with each of the following?** - 5-pts scale from 1 "Completely dissatisfied" to 5 "Completely satisfied".

- **Q47. How would rate your overall physical health?** - 5-pts scale from 1. "Very poor" to 5. "Very good".

- **Q48. How would rate your mental health?** - 5-pts scale from 1. "Very poor" to 5. "Very good".

Definition of Vulnerable Groups

Vulnerable groups	Definitions	Source Question
Ethnic minorities	Respondents who identify as a minority ethnic group.	D11. Thinking about where you live, do you consider yourself to be part of any of the following? - Selected 1. A minority ethnic group
Financially insecure	Respondents who claim to be completely dissatisfied or somewhat dissatisfied with their financial situation.	Q7. Please rate how satisfied you are in each of the following areas of your life. - Selected 1. Completely dissatisfied or 2. Somewhat dissatisfied for code 8 'Your financial situation'.
LGBTQ+ minorities	Respondents who identify as a minoritised or marginalised group in terms of sexual orientation or gender identity.	D11. Thinking about where you live, do you consider yourself to be part of any of the following? - Selected 3. A minoritised or marginalised group in terms of sexual orientation or gender identity.
People with disabilities	Respondents who consider themselves to have a disability.	D14. Do you consider yourself to have a disability? - Selected 1. Yes
Women with young children	Women who have at least one child aged 0 to 6 years old.	D1. What is your gender? - Selected 1. Female D9. How many children do you have in the following age groups, if any? - Selected 1, or 2, or 3 or 4+ for the following age groups: 0-1 years / 2-3 years / 4-6 years