

Comfort Times

by ISPF

Emergence of online business

Should the Mattress industry change its contours? How?



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Really?

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popping the pill



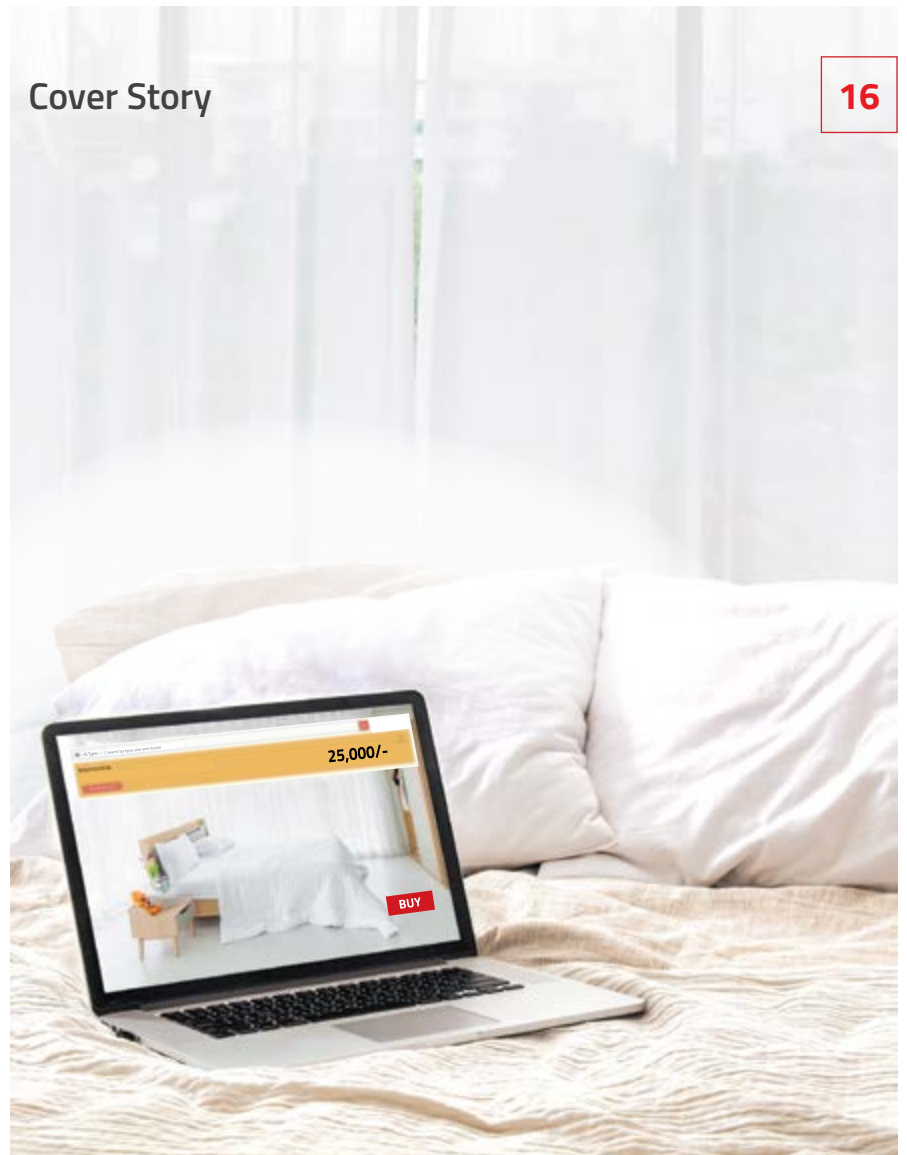
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How online is changing the value chain of mattress industry?

E-commerce has upended most industries – affecting not just revenues and market shares but customer habits and expectations too. Is it an alarm for mattress players to sharpen their strengths or a siren to pin their tents elsewhere? Or is it a sound that hints of a strong chorus in the making?

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FROM THE EDITOR



We shall overcome! Coronavirus or rather Covid-19 has taken hold globally. The influenza-like viral infection is disrupting everything in its wake. Countries are in a state of lockdown; tourism has come to a halt, the aviation sector is bleeding, and so on. In a matter of just a month or two, the virus that emerged out of Wuhan province in China has halted the economic march across the globe. This could be pretty unnerving and unsettling. But as late US President John F Kennedy used to say; in the Chinese language, the word "crisis" is composed of two characters, one representing danger and the other, opportunity.

Similarly, while many sectors are losing money, some will gain prominence and profits too. Like, digital and online shopping. Indians seemed to have embraced online shopping over the past couple of years. The best instance is how huge online shopping festivals have become. The Diwali, Independence and Republic Day sales are breaking new records year after year. With a boost in digital wallets and online payments, add to it the availability of broadband Internet everywhere, the digital sphere is only going to go bigger.

So, what does this online expansion have to do with the mattress industry? Well, pretty much if you care. The growth of online space could be a significant opportunity for the mattress industry. Not only, it can be a vibrant medium for revenue growth in terms of sales, but also, it can be an excellent medium to build a brand. There are many great

examples of how mattress companies have leveraged the power of Internet to spread and grow their business. In this issue, you will find quite many instances of such success stories. Also, you will find a detailed analysis of the strategy that most companies have adopted to be successful in the online space; it could be the building block for your strategy.

Interestingly, there is a new concept that is taking shape in the hospitality space. It's called sleepcation, a short and snappy vacation to sleep and relax. Find out more about the novelty in this issue, and how it could have an impact on your business.

Finally, there was something to cheer for the mattress industry in the Union Budget presented by the honourable finance minister Mrs. Nirmala Sitharaman. There was a hike in import duties for a list of products, including furniture and mattresses. This is the second hike in a matter of three years. The idea behind the increment is to promote domestic manufacturing. The move could be an added incentive for the industry to expand its manufacturing units. The move will benefit local players over foreign ones. You can know more about that topic in this issue.

In the end, these are challenging times for the country as a whole, and the industry in particular. Through resilience, innovation and dollops of work, we can overcome these challenges. Covid-19 might disrupt our lives for sometimes; it will not dissuade us from our journey to the top.



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SERVICE

INNOVATION

CONSUMER
EXPERIENCE

VISION

- To promote the sleep products industry by enhancing consumer awareness on quality sleep, while setting benchmarks for its products and services.
- To represent the industry with a commitment to the society and the environment.

Hyderabadis sleep around five hours on weekdays

A survey titled - 'In Search of Better Sleep 2020' by Centuary Mattresses and Wavemaker finds that the average hours of sleep of the Hyderabad city has dropped significantly to 5.08 hours on weekdays and 6.88 hours on weekends as compared to 7.88 hours and 8.13 hours respectively a year ago. After raising from the bed in the morning, at least 41 percent of Hyderabadis feel that they are restless throughout the day. About 26 percent of Hyderabadis said that their sleeping time is being reduced due to continuously working on laptops and smartphones even after going to bed and around 51 percent of Hyderabadis witnessed that they were suffering with back pain due to their irregular sleeping hours and also the un-scientifically designed surface of the mattress.

The survey was done across various Indian cities including Hyderabad and Visakhapatnam and nine other cities, to understand attitudes, perceptions, and behaviours around sleep and other issues. The survey found that it is not only the duration but the quality of the sleep and various factors leading to distractions have been a major concern growing year on year. Overall, the survey found that collectively average hours of sleep have come down in most of the cities.

In 2018 people slept 7.66 hours on weekend and 7.48 hours on weekdays which has come down to 6.85 hour on weekends and 6.76 hour on weekdays.



Flo to set up offline stores

Flo Mattress which launched four years back as an online speciality sleep products company is planning to hit brick and mortar model. An expansion into pillows, blankets, bed-sheets and mattress protectors are also on the cards while its off-line stores are pitched as Experience Stores.

With this move, which is said to be in early planning stage, it is now clear how online players are thinking of complementing their web stores with physical fee-and-touch outlets that are crucial in consumer purchase decision making process.

Flo launched a differentiated online experience through its packaging, a US-style 10-year warranty and a whopping 100 nights of free trial to its customers. Flo also takes pride in its obsession to quality. It is known to have spent considerable field and lab time to test over 100 combinations of foams to pick the perfect one for their mattresses. Flo sells two mattress variants. The Ortho which is medically tested and shuns memory, is designed for those over 60 years of age or anyone with back issues needing extra back support. The other, Ergo, is more of a comfort variant sporting a layer of pressure-relieving memory foam.

Flo's mattresses come with a Cashmere fabric cover that draws the heat away from the body. Flo followed the neo, millennial friendly D2C model that American mattress companies adopted. The used the power of Internet to reach out to its customers directly. It manufactured its mattresses in India using a variety of foam.



Trends pushing mattress industry

The year 2020 is quite a milestone for almost everyone and it certainly is for the mattress industry. If you want to find out what are those crucial factors that will drive this market this year.

Here are the crucial 3 to watch out for in this crucial year.

1. Online market is maturing. With online players ensuring they have a physical presence, they are signaling that their model is here to stay. The online revenue is likely to cross th Rs 300 crore mark in 2019-20.

2. Indian mattress market was once dominated by the unorganized sector. Now, slowly and steadily the organized sector is eating into the former's share.

3. Sleep is now a health factor. Sleeping on a good mattress is a priority now. Indians have started to invest seriously in their sleeping comfort. Sleep is also becoming eco-conscious pushing up the demand for eco-friendly material.



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Layla Sleep Launches New Hybrid Mattress

Layla Sleep, a direct-to-consumer bedding brand taking a customer-forward approach to product design, has launched a new innovation in the sleep world several years in the making: **the flippable Layla Hybrid Mattress**. Taking careful consideration throughout the design and testing process, the Layla Hybrid is largely a direct result of consumer feedback as a unique solution to common sleep ailments.

"We've been continuing to evolve our collection of sleep products after the launch of our first mattress in 2016 through a combination of innovative technology and simply listening to our customers," said Akrum Sheikh, Co-Founder of Layla Sleep. "We've been asking consumers what they're looking for that they feel they don't already have in a mattress, and the biggest takeaway is that people aren't waking up feeling rejuvenated or rested, so when they finally do sleep on a product that can do that for them, it's life-changing," he continued.

Made in the USA, the Layla Hybrid combines Infinity Edge coils with copper-infused memory foam for a winning combination of plush firmness and pocketed coils.

Latex mattress market set for phenomenal growth

Global latex mattress market is expected to rise to an estimated value of USD 19.50 billion by 2026, registering a healthy CAGR in the forecast period of 2019-2026. Databridge Market Research said that global latex mattress market can grow into the most important market in the world that has played an important role in making progressive impacts on the global economy. The study is derived from primary and secondary statistical data and consists of qualitative and numerical analysis.

Global Orthopedic mattress market is buoyant The global orthopedic mattress market is expected to grow at a CAGR of over 2 percent during the period 2019-2025. The global orthopedic mattress market is in the nascent growth stage; however, it is expected to grow exponentially during the forecast period. A sound sleep is recognized as an essential factor for good health and body, thereby increasing efficiency and the quality of life. As people are becoming health conscious, the increased awareness of good sleep and sleeping postures is likely to drive the demand for the high-quality orthopedic bed mattress. The growing demand for eco-friendly orthopedic mattresses is another key trend witnessed in the market. They are made of non-toxic materials,



including organic cotton, organic wool, and organic latex. As the disposal of mattresses has emerged a major environmental hazard across the globe, the demand for biodegradable and sustainability materials is gaining traction. Manufacturers are increasingly shifting to the materials that are easy to dispose of.

The growing awareness of proper sleep postures and back and spine-related disorders is expected to develop opportunities for manufacturers across the world. Moreover, the increasing number of ortho surgical procedures is also influencing product demand. Developed countries such as North America and Europe are witnessing a rapid adoption due to the growing number of back disorders and high acceptance of innovative beds.

Casper's IPO lists, loses Unicorn status

Casper Sleep Inc., the startup that popularized the bed-in-a-box trend, saw its shares rise more than 20 percent in their trading debut in Feb 2020, after underwriters priced its initial public offering at \$12, the lower end of a reduced range.

With that the company's valuation is less than half the \$1 billion needed for it to be a true unicorn, the Silicon Valley term for a company valued at that level. The New York-based company sold 8.4 million shares to raise \$101 million. Just hours before the pricing, it cut the range to \$12 to \$13 a share, from a prior range of \$17 to \$19 a share. As per reports, with 39 million shares

outstanding, the \$12 per share pricing values the company at about \$468 million, below the \$741 million implied by the previous price range and well below the \$1.1 billion it garnered in its last private funding round in 2019. Casper is trading on the New York Stock Exchange under the ticker symbol "CSPR." The company had to persuade investors that it is not like the other loss-making IPOs of 2019, such as Uber UBER, -4.01 percent Lyft LYFT, -4.69 percent and WeWork, the office-sharing company that saw its IPO plan collapse after its filing revealed shaky underlying financials. Casper CSPR, -0.21 percent which was founded in 2014 with a foam

mattress as its only product, addressed that challenge in an IPO prospectus that framed its business as the third cog in the global wellness trend, alongside nutrition and fitness. Its stated mission is no less elevated than "to awaken the potential of a well-rested world" and be part of a "sleep economy" worth about \$432 billion worldwide and \$79 billion in the U.S. alone. Those figures come courtesy of an analysis conducted by Frost & Sullivan, which Casper commissioned in 2019. Proceeds of the deal are to be used to repay debt, fund growth and for general corporate purposes, according to a filing document.

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Increase in import duty could be the boost for mattress industry

The Indian mattress industry has seen significant shifts over the period of last few years. The Indian brands growing day-by-day need good support from Government policies. Let us take a look.

Recently, the union minister of finance, Mrs. Nirmala Sitharaman tabled the Budget in the parliament. The finance minister announced various steps and measures designed to boost the domestic economy. One of the bigger objectives of the union budget was to spur economic growth by providing a fillip to domestic manufacturing. Make in India has been one of PM Narendra Modi's pet projects, and he has continuously encouraged companies to set up manufacturing plants domestically. The cabinet ministry is also aligned with the ethos and works to provide as much impetus to the domestic manufacturing as it can.

The latest budgetary outlay as presented by finance minister Sitharaman seems to align with that objective. She announced a slew of

measures to promote manufacturing in India, especially the raising of customs duty on a range of products.

In the current budget, the government increased customs duty on several products, including toys, footwear and furniture items, intending to promote 'Make in India' and boost domestic manufacturing. On furniture goods such as seats, mattress support, articles of bedding, lamps and lighting fittings, the import duty has been increased to 25 percent from the current 20 percent.

"Labour-intensive sectors in MSME are critical for employment generation. Cheap and low-quality imports are an impediment to their growth," stated finance minister Sitharaman in her speech while presenting the annual budget. She added that special attention

had been taken to put measured restraint on import of those items which are being produced by MSMEs with better quality. "Keeping in view the need of this sector, customs duty is being raised on items like footwear and furniture," she added.

Providing the boost

Prior to the budgetary announcements, the Commerce and Industry Ministry had asked the Finance Ministry to rationalise basic customs or import duty on over 300 items from different sectors.

This was not the first time that import duty was increased for the bedding industry. Just two years back in 2018, the government had increased the import duty on mattresses from 10 percent to 20 percent. The latest hike builds over the earlier increase.

The rise in import duty will have an impact on foreign players like IKEA who import mattresses from overseas and do not have a significant presence in terms of manufacturing footprint. Over the past couple of years, the imported market segment has been growing at a healthy rate and the increase in prices could be a spoiler.

With the expansion of the real estate sector, leading to a rise in construction of both residential and commercial spaces, this has led to an expansion of the mattress industry. New homes require new cots and cots require mattresses. Among various sizes available, king size mattresses are the most preferred one, comfort and support are the critical factor for their dominance in the market.

The positive shift in the bedding market can be attributed to the rising affluence of the Indian middle class. The consumers' perspective is no more limited to just practical aspects when it comes to mattress; they are now demanding comfort and additional functionality. Over the years, mattresses are no longer considered as just consumer durables; they are deemed as an indicator of the quality of life.

One of the indicators of this shift is the rise in the demand for customised and luxury mattresses. For instance,

This rise in import duty will impact the foreign players like Ikea who are importing mattresses from overseas and yet to have a significant presence in terms of manufacturing footprint. Over the past couple of years, the imported segment has been growing at a healthy rate.

there is significant demand for high-end luxury mattresses that are stuffed with horse hairs or cashmere wool. Yet, the major players in the luxury space are foreign brands.

With the price of these imported mattresses set to rise because of the increase in customs duty, the consumers will now look at other options that are available locally. And the good part is that there are plenty of available options, right from memory gel mattress to medical mattress.

Grappling with the unorganised sector


The mattress industry in India has undergone enormous shifts in the past couple of years. Accounting for more than 11,000 crore, it is projected to reach 14,000 crore by 2021 with a CAGR of 9 percent. The growth of the industry has been boosted by the expansion of the online retail industry that has aided the industry to grow at a healthy rate. This is a sterling achievement, because the industry has gone a significant shift over the last few years from a largely unbranded market to a branded one. The branded market comprising large, mid-size and smaller manufacturers constitutes around 34 percent of the market, with about 20-25 players spread across the geographies.

The branded mattress market is expected to grow at a CAGR of 13 percent over the next five years to constitute 37.5 percent of the market by 2022. According to experts, implementation of GST has aided the growth of the industry as it helped to close the gap between the unbranded players and the branded ones, thereby leading to an increase in opportunity for the branded companies.

The organised industry has over the years invested heavily in growing their business, investing in manufacturing, building a retail presence, and so on. The latest move by the union government will aid the industry again, as there will now be a significant gap between imported mattresses and Indian ones. This move could have two significant implications:

- 1. Increase in domestic manufacturing:** Companies across the board will be encouraged to set up a manufacturing base in India because the Indian market is growing at a healthy rate. Since mattress manufacturing is a labour-intensive business, there is a natural alignment with Indian conditions.
- 2. Indian manufacturers venturing into luxury segment:** Indian branded companies are still functioning in the sub-luxury space. Since the luxury mattresses will now be costlier (and will stay so in the years to come), there is a business opportunity for local brands to capture a pie of the luxury segment.

Either way, the market will expand, and job opportunities will increase. According to media reports, Trade Promotion Council of India (TPCI) Chairman Mohit Singla said the hike in duty on furniture is a "great move" by the government which will provide impetus to domestic manufacturers to augment 'Swadeshi' products. "This move will allow Indian furniture products to find space in the global retail shelf and also meet the burgeoning domestic demand by leveraging its potential," he said.

Let's hope that the prediction comes true. 



Consumer facing and fact based messaging is critical to empower the consumer and build confidence

Upgrade To A Better Sleep

A perspective on transforming the Indian mattress industry from unorganised to organised segment

The comfort & bedding industry in India is at a tipping point - and what the players choose to do next will go a long way in determining how well and how fast the category evolves over the next decade or so.

Being a largely unorganised industry (to quote a recent survey conducted by the ISPF through a market research agency, 63% of the mattresses sold in the country still come from the unorganised sector); the opportunity presented to the organised sector through the implementation of GST is huge. Add to that the explosion in the health & wellness industry; coupled with growing awareness levels & studies on the role of sleep in an individual's well being, and it doesn't take long to realise that the category is ripe for transformation to a

well-structured, regulated, and largely organised sector.

While e-commerce or online sales share in the overall category sales is still at a nascent stage with less than 5% contribution, the number of 'digitally influenced' customers are much higher i.e. approx. 45%; which means that brands now have easy access to passing relevant product and sleep information to the end consumers directly. This is also an area through which organised brands can stand out from the local clutter, and also counter balance retailer influence.

The entry of large format retailers such as IKEA & Ashley Furniture with heavy marketing spends is bound to create a growing awareness for the category, and the domestic industry

should be ready to capitalise on this opportunity. The recent growth in the hospitality industry has also been a growth driver and so has the evolution of 'sharing economy' with many furniture rental companies popping up across the country.

Of course, there will be barriers - the least of all presented by the lack of standardisation in product sizes & materials; which works in favour of the hyper-local player. Add to that the relatively inadequate product differentiation and sales counselling offered to the consumer at the retail touch points; and it shouldn't come as a wonder why such a huge chunk of the industry continues to be unorganised. Hardly any player has invested in cultivating a deeper domain knowledge on consumer sleep preferences,

purchase behaviour, scientific facts, etc. and to equip the retailer and their salesmen with adequate tools to come across as 'sleep experts' to the end consumer.

On the operations end, the other main barrier preventing the category from taking off is the complexity of logistics involved - in warehousing, transportation, last mile deliveries (particularly in larger cities), disposal of old mattresses, etc. to name a few.

Having understood the category growth drivers and also barriers, the following roadmap may be useful for the organised industry players to distance themselves from the local players and also drive market expansion:

1. Retail Upgradation:

- Upskilling of RSAs (retail sales associates) – make them sleep experts
- Point of Sale Merchandising & Branding with consumer facing

In developed countries, the industry is highly regulated for chemical compliance, flame retardancy, textile certifications, use of natural materials, and other parameters

- messages
 - Experiential Store Design & Ambience
 - Digital interfaces at in-store level to facilitate consumer education, product selection, availability information, etc.
- #### 2. Insightful Marketing Campaigns
- highlighting the importance of sleep and the role of a good branded factory-made mattress in facilitating better sleep (a good example is the Tempur 'Sleep is Power' campaign)

3. Consumer Centric Approach:

- Exciting consumer promo offers – as opposed to conventional gifts
 - Upgraded Service – through last mile deliveries, installation and mattress care support, simplified product return/replacement solutions, etc.
 - Holistic sleep solution offerings with complete range of bed bases, accessories & other bedroom products
 - CRM as a tool for engagement, customer satisfaction surveys & reviews, brand connect, replacement sales
- #### 4. Technology Upgradation & Product Regulation
- this may be a radical but important step in the upgradation of the Indian mattress industry to ban certain materials such as filled/LD foam/EPE/etc. This would be in line with most developed countries where the industry is highly regulated for chemical compliance, flame retardancy, textile certifications, use of natural materials, and other such parameters



The long term benefits accrued by the organised segment and the industry at large by adopting these ideas will be immense. Retail upgradation & consumer facing promotion strategies will lead to expansion of consumer base and building goodwill/trust; while product/process regulation will result in not only raising the entry barrier for local players but also elevate the industry to be at par with global standards – thereby opening the door for newer markets around the globe. [CT](#)



Mr. **UTTAM MALANI**, Executive Director, Centuary Fiber Plates Pvt Ltd.

Use of natural materials such as coir & other fibers improves product performance as well as the sustainability quotient

How online is changing the value chain of mattress industry?

E-commerce has upended most industries – affecting not just revenues and market shares but customer habits and expectations too. Is it an alarm for mattress players to sharpen their strengths or a siren to pin their tents elsewhere? Or is it a sound that hints of a strong chorus in the making?



The world has condensed on a thumb now. From cabs to hair-dressers to food to plumbers to instant money or the latest season of Tiger King – everything about customer patience, and the willingness to wait, has changed. We want everything NOW!, thanks to the 'A for App' world we have got used to.

But almost each of this new business disruption can be traced back to some inconspicuous technology that was bubbling noiselessly on a lab or desk somewhere – away from the earshot of a traditional offline giant.

For mattress companies, this harmless-looking, irrelevant-sounding technology seed of disruption was born not in a computer code but in a machine shop. Yes, the Roll Back Machine. A new way of rolling and shipping mattresses that led some digital natives to believe that even they can enter this high-scale and heavy-capital business by breaking the barriers of inception. They could now shrink-wrap a mattress just as a street-food guy could wrap a lovely Taco – at staggeringly-cheaper freight costs, at an unbelievably-fast delivery time and with a new twist to how people buy and put down mattresses.

How Global Online Companies are Influencing the Mattress Industry?

If we look at the international landscape first, the roll kept growing to new lengths. From pioneers like Casper to strong contenders like Purple, this market suddenly started creating its own niche. And before the traditional behemoths could blink their surprised eyes, this niche had started affecting customers of the erstwhile world. Online players may have arrived slowly, but they changed the rules of the game a lot, beyond recognition.



Professor Len Sherman, Adjunct Professor of Business Management, Columbia Business School gives a quick class on understanding what made the online disruptors tick so well. *"When Casper launched in 2014, their decision to enter the mattress/sleep*

The usage of online is helping the industry to boom and is also creating education and awareness about the organised sector, leaving positive effects on the overall mattress economy

category was actually extremely well-grounded (unlike Uber, Doordash, WeWork, Oyo, Katerra, Brandless and countless other Softbank investments) who really are/were in inherently low-profit businesses. His assessment adds how gross margins for incumbents in the mattress business were exceptionally high – over 50 percent. "Customer satisfaction was abysmal. Also, Mattress compression technology enabled a fundamentally new business model. There was very little competition at first (Bed-In-A-Box and Tuft & Needle were small and relatively unknown at Casper's launch)."

What Indian Companies can learn from these players?

The soft dents of online models can be seen in new creases forming all around. The Indian mattress industry is slated to touch Rs. 14,000 crore by 2021 and Rs. 300 crore has been projected as the size of online mattress market here. A slew of names have made their mark in this short window of online storm – Wakefit, Sleepyhead, SleepyCat, Amazon, Flipkart, Sunday, Springtek, and Pepperfry – they are well-known names –or in some cases, new habits-by now.

Nishit Garg, Vice-President, Books, General Merchandise, Home and Furniture, Flipkart gives a closer view of what makes online platforms what they are today. *"Mattresses have many variants and size combinations available in the market, making it difficult for consumers to identify products with specific features that meet their requirements. Flipkart, as a homegrown e-commerce marketplace, offers consumers access to a vast selection*

of quality and affordable products along with affordable payment constructs such as No Cost EMI, Debit Card EMI etc. easing the purchasing journey for consumers."

He elaborates that as a consumer focused brand, Flipkart's endeavour is to offer the best e-commerce experience to ensure optimum consumer satisfaction. *"Using filters on the platform, consumers can identify the features that they are looking for in a mattress."* The company also offers a 100 nights' free trial to customers, which goes a long way in assuaging any concerns related to quality.

"This is complemented by detailed buying-guides and ratings and reviews, enabling consumers to make an informed choice from a multitude of options such as foam, spring, coir, orthopaedic or latex. We also offer an impressive post-purchase experience in the form of free delivery and installation, making the entire purchase experience seamless." He adds.



As Nipun Gupta from Springfit Mattress shares, for many, selling sleep products online has brought a boom and Springfit, as a technologically advanced company, is using its full potential to explore the online market and address unorganised market issues. *"Market places such as Amazon, Flipkart, Paytm Mall are the ones leading the show with online selling. This has led to many new start-ups and businesses to focus on online selling, enabling businesses like ours to flourish."*



Similarly, Balachandar S., CEO, Repose Mattress Pvt. Ltd. avers that the online shift is helping the industry to deepen its penetration and address unorganised market issues. He notes that the biggest challenge for this industry has been the area of low consumer involvement. *"In such a scenario, an online business also brings focus to this category. Many more consumers are paying more attention to the mattress they want. Overall, the noise levels made in online and offline space are*



good for the category. Online business is not a threat for offline business but a challenge which is a good thing for the overall category of mattresses."



Kabir Siddiq, Founder and CEO, SleepyCat evaluates the impact to be a mixed one (but leaning on the positive side). *"The usage of online is helping the industry to boom and is also creating education and awareness about the organised sector, leaving positive effects on the overall mattress economy. That said, it is also taking away business from traditional players and unorganised players. For customers, it is a shift with benefits – pricing, stay-at-home convenience and no risks."*



The recent noise made by the online industry can only be good in terms of further raising awareness levels for the category at large, opines Purushottam Malani, Chairman & Managing Director, Centuary Mattresses as well.

Looks like it is hard to ignore the online onslaught anymore. In fact, as time passed, these new players have certainly made the industry desirable, fun and better. What led to this new world? What makes an online name different from a traditional one? Discounts, ease, assembling-simplicity or style – or all of the above, as Professor Sherman gave a whiff of? Let's pick the

layers one by one.

How online disruption is helping the mattress industry on - Manufacturing?

The ease of assembly that came due to the advent of memory foam and compression technology is remarkable. Memory foam was now amenable to be rolled easily and sent for fast and easy shipping. On the customer side, it was easy to receive this box that was lighter and portable enough to be carried around the corners, furniture and doorframes of a house – without the need of extra labour or handymen.



Assessing the role of c o m p r e s s i o n technology, in particular, Mr. Tushaar Gautam, Director of Sheela Foam Ltd notes that it is a boon for online players to ship the mattress to consumers in all parts of the country. *"Advanced roll packing machines can compress anything from all-foam mattresses to advanced hybrid beds. Certainly, more product needs can be met as it substantially reduces the SKU space per-transit. It also catalyses the consumer preference level by its sheer convenience level of easy transportation of the product. Moreover, the offline retail touch points can be scaled up through Canopy activities for mattresses. It also supports the pre-purchase concept."*

One cannot discount the aspect of having strong control over manufacturing or sourcing from a good player - to be sustainable in this market.

One cannot discount the aspect of having strong control over manufacturing or sourcing from a good player - to be sustainable in this market.

Tushaar Gautam, Director at Sheela Foam Ltd reasons well that procurement and supplier relationship management are essential in order to meet the price and quality requirements. *"As consumers lean towards personalised products, the manufacturer has to rely on the response-agility and flexibility of its supply chain to maintain its competitive edge. With the automation of an increasing number of supply chain processes, the collaboration between the manufacturer and supplier is becoming all the more essential."* He opines that strong, direct-sourcing relationships help control supply chain risks. Using next-generation SCM and WMS tools, procurement teams now benefit from real-time visibility on their suppliers' activities and from greater control over the purchasing process. *"Having control of manufacturing (in comparison to even sourcing) helps in quick delivery as well as the delivery quality to the consumer. Importantly, the post-sales services can be controlled even better and have been proven to enhance the consumer satisfaction level."*

As to the raw material and sourcing impact of online market, Kabir Siddiq, Founder and CEO, SleepyCat unravels that simplification has been a welcome consequence of the change. *"Because of the online mattress industry, the choices have become simplified - so that helps us to concentrate on fewer raw material varieties and types of foam. There is a heavily-concentrated demand for only one kind of compressible memory foam."*

To add to that - Technology's role is



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growing in every possible direction. *"We send the suppliers bookings through online avenues and get the material sourced now. We have our own technology team, and we are also developing some software (order management software and inventory management) to bolster procurement in a smarter way across all supply chains."* He shares.

How online disruption is helping the mattress industry on Logistics?

As a Cloudtail manager from Amazon reveals, it was not so easy to ship bulky items without damage or delay earlier. But players like Amazon have cracked the operations part well – how to do fast and safe deliveries and meet customer expectations without letting items gather dust in warehouses – that's a big step forward. Now the company is also encouraging sellers who can deliver to custom pin-codes in shorter spans of time – The encouragement comes in the form of priority on the search pages. The idea is to accelerate speed and elevate post-sales service with the localised edge. These efforts, as the manager reflects, have really helped to take customer satisfaction many notches up. New strides like brand registry and private-label brands are going to show more impact next.



Chaitanya Ramalengowda, Co-founder & Director, Wakefit.co

shines some more light on what is that online players do differently that parks them in a different mind-space for customers. *"The mattress market was highly under-optimized when Wakefit.co entered the market four years back. A majority of Indians bought mattresses from local, unorganised players, due to the high cost attached with good quality mattresses. Innovation and research in the industry was also found wanting, with respect to understanding Indian consumers' needs and requirements."*

He points that the customer service in the industry was poor, as people selling the mattress rarely had knowledge about the product and the science of sleep. *"New-age sleep solutions players like ours have been able*

It is not just the start-ups that are bringing in revolutionary technology game-changers to the industry. Even well-known names in the industry have started embracing cloud and automation to redefine their offerings and customer experiences. With ERP, they are changing data's power. With CRM, they are delighting customers with real-time outcomes. With inventory management, they are accelerating and simplifying product movements. With new billing systems, they are paying their suppliers well and fast. With SCM, they are able to refurbish stock the minute it crosses a threshold of deficit. With HR and factory tools, they are changing the way they look at products, machines and human assets – so yes, mattress industry is witnessing a big flip thanks to a lot of technology-driven changes.

to disrupt the market by improving quality through R&D, cost efficiency through a Direct-to-Consumer (D2C) business model and robust and intuitive customer experience teams. We are seeing a huge shift in people's buying patterns due to these disruptions."

How online disruption is helping the mattress industry on Customer Experience – Choice, Delivery and Retail?

It is not just the delivery attraction or the online ease that worked in favour of online players who got successful. Candid introspection by traditional incumbents will tell that customers were already exhausted and disappointed with existing experiences. Questionable sales tactics, charging high mark-ups for inferior products and selling the same mattress under different names at different stores – all this was not skipped by the sharp eye of the customer. Now choice is what all these annoyed customers needed. And that's what online platforms provided them. They did not necessarily wean away offline customers through a lot

of hard work. They just gave a nudge to already-dissatisfied users to make a shift to a simpler world.

In the post-digital world, speed and convenience are not luxury features but staple have-to-be-s of any business. Online players injected this spirit of convenience in the industry by using the bed-in-a-box and smart logistics-play, and deftly so.

To add to that, customers can now compare different options sitting at home, swiping left and right in their pyjamas. They also get to enjoy some really tempting 'trial and return' convenience that was absent in the offline space. All that, with no hidden or extra strings attached for the customer. The return policies are as convenient and frictionless as buying the mattress at the click of a button. Given the well-cushioned pockets of start-ups, most returned mattresses can be dumped or donated – so the idea is to induce trials rather than discourage them.



In her studies on ecommerce and online selling as well as buying behaviour, Dr. Renuka Kamath, Professor of Marketing, at SPJIMR,

Mumbai found that online players face a major handicap – predominantly that of real-time consumer experience and that of building consumer trust. *"Online selling with its absence of touch, feel and sleep experience, has to ensure a way around, by giving easy return policies, and having experience stores in their main markets."*

As per a 2017 KPMG Report on Consumer Attitudes and Expectations, the reasons that consumers shop online instead of at stores are multiple. But the ability to shop anytime (58 percent), to compare prices (54 percent), to save time (40 percent), not having to go to shops (39 percent), not having to locate hard to find items (20 percent) and the convenience of everything in one stop-shop (27 percent) are major factors spurring people to choose online modes. In fact, people love to avoid check-out lines (11 percent) and



“Some of the brands are totally selling and distributing products through online portals but not all have proven to be successful. The competition in online selling is equivalent to retail. The fact is that the online selling of mattresses has increased significantly and at this pace it may leave the retail market behind. As in online world, the marketers can influence the potential customers. Unfortunately, many of the online sellers use unethical approach to convert sales by using false advertisement. Some of these matters need to be addressed critically.”

*Nipun Gupta,
Executive Director, Springfit Mattress*

crowds (15 percent) too. The negative experiences of being in a shop turned out to be more prominent for densely populated markets – crowd avoidance boils down as a major switch factor for markets like India, China and Singapore. Apart from that, access to products that are not available locally – that adds up as a crucial nudge for most customers to go online.

Then there is the pricing angle to reckon, which has been a pet peeve for many customers. Before the advent of e-commerce brands, a lot of the market areas were notorious for charging high mark-ups for products. Retail margins were sometimes too heavy for the end user to bear. In fact, some estimates tell that at one point leading global names like Serta Simmons Holdings and Tempur-Pedic had margins as heavy as 50 percent. But the likes of Casper found a way to roll foam in a box and chop away the role of expensive dealers and retail overheads. The KPMG Report also unearthed that better prices emerged as a top reason for most customers (46 percent). There were also a considerable number who preferred online for its free shipping (29 percent) factor.

Nishit Garg, Vice-President, Books, General Merchandise, Home and Furniture, Flipkart reasons that as the mattress manufacturing process is mechanised and has very compressed

manufacturing lead times, Flipkart helps mattress manufacturers to operate in a made-to-order construct, which helps reduce their working capital overload. *“This enables them to pass on additional savings to the customers online.”*

Consider how the online shifts have redefined style and engagement areas for customers as well. Purple and not grey – that’s how the shift is becoming visible. Customers have been introduced to a fresh, fun, engaging, star-dusty, fuzzy and bespoke way of mattress-buying. Players like Tuft & Needle, Leesa, Nectar Sleep, and Lull have given a facelift to the word mattress – it is no more a boring and heavy-ticket item; but something that customers look forward to browsing, selecting and rolling out. Mattress-shopping is now suddenly a cool affair. Sleep is now not a once-in-eight-years purchase but a lifestyle category, thanks to the fresh marketing twist that online players have brought in.

Recall Casper’s Labor-day boat rides, or chatbots like Insomnibot 3000 who entertain people who cannot sleep or late night snap-hacks to show you are at a party while you may be just tossing and turning in bed or Leesa’s Dream Gallery in New York that showcases work by homeless people – marketing by online brands could not get more creative and intimate than that!

Most online players may be focusing on speed and variety but there are some who are etching distinct niches to stand out of the clutter. Like Loom & Leaf that is packaging itself as a luxury name. Purple leveraged the hyper-elastic technology to create a new mattress structure and Tuft&Needle had Apple-inspired software developers-turned-founders setting a new product experience.

As Chaitanya Ramalenggowda, Co-founder & Director, Wakefit.co captures, *“We operate with a sharp focus on improving the quality of sleep of Indian consumers. This philosophy is part of our training modules and is ingrained in each employee. Each team within the company is obsessed over customer needs and pain points, identifies root-causes and behavioral trends and works towards making consumers’ lives better every day.”*

We are quickly catching up on – how to interact with customers, real-time monitoring of any issues of delivery and customer experience. All modes of communication – chat-systems, WhatsApp and calls converge and add to our CRM to add to the overall efficiency.” As Kabir Siddiq, Founder and CEO, SleepyCat lets on.

What Online Players Struggle With Too?

Yes, the shift made noise. Yes, it challenged existing players. But soon

the dust settles and separates true men from the boys.

The market could not have been at a more interesting turning point than where it is now. On one hand, a traditional biggie like Mattress Firm has filed for bankruptcy, and on the other hand Casper, an online leader, saw a damp IPO recently. Who is losing the sizzle then? This side or that side?

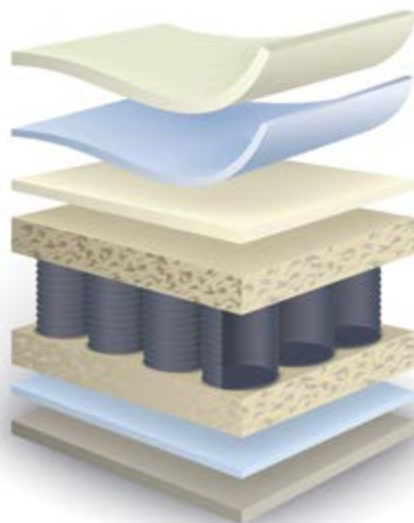
Professor Len Sherman, Adjunct Professor of Business Management, Columbia Business School has a poignant and contrarian view worth mulling over here. *"I've been frankly surprised and dismayed by the harshness of criticism surrounding Casper's IPO."*

He argues how someone had to step up to spur market acceptance and Casper was uniquely willing to do so. *"T&N, Purple and other fast followers were able to draft behind Casper's pioneering category building investments. Casper has built industry leading, positive brand awareness, the largest branded store network, a deep bench of product design talent, the broadest product line and the biggest international presence. Casper adopted an inherently ambitious and expensive strategy, but a logically-sound approach to achieve market leadership that probably got a bit over its skis given the unexpected intensity of competition."*

In his reckoning, the business is already profitable for some players and can yield a sizeable opportunity for Casper if it executes its next development stage well. Casper's biggest flaw relative to these other Unicorns is their choice and need to go public in an extremely hostile environment!

"Casper went through a frenetic expansion phase over the past few years (product/physical retail/international scope) and may well have to rein in some of their activities (e.g. I've never been a big fan of their early international forays). But they have built an exceptionally strong brand, are well managed and poised to penetrate and large and profitable (unlike Uber) TAM –Total Available Market."

The bottom line, as he sees it, is that



Consider how the online shifts have redefined style and engagement areas for customers as well. Most online players may be focusing on speed and variety but there are some who are etching distinct niches to stand out of the clutter.

the mattress industry was overdue for disruption; based on high costs, poor customer service and severe inertia levels by market-leading incumbents. *"Whether Casper ultimately succeeds remains to be seen (most first-movers die). Under any circumstances, Casper has done a valuable service in waking up a sleepy industry!"*

What both online and brick-and-mortar players should remember?

The very line between online and offline is blurring now as Ankur Bisen, Senior Vice President of the Retail & Consumer Products division at Technopak contends. *"Some players like Pepperyfry*

or Urban Ladder may have started online or some like Ikea may have explored it as an alternative channel but the online vs. offline debate is quite old now. Now there is enough wisdom to realise that an amalgamation of the two worlds is inevitable."

He reminds us how the total size of the market is still below three percent of the retail basket so online penetration has to be viewed from a very different lens. The question is not about who outstrips who – an online player or an offline one – but who expands the market and who deepens the overall penetration.

KPMG Report still showed 23 percent customers who would rather visit a shop than go online – why? For the shopping experience – now that's a silver lining for offline players to focus on. Can they accentuate and enrich the shop experience and catch up to the fun, speed and effortlessness that online rivals offer?

Yes, there are still people who prefer to touch a product (56 percent) or who are concerned that the products will turn out different (55 percent), or who feel the delivery time is too long in online service (34 percent). For 25 percent customers, high shipping costs are a turn-off too.

But what is more interesting is the segment who still feels that a product is too valuable to be brought online (24 percent). Now this is exactly where the traditional players can go hybrid or go deeper into their footholds to carve loyalty in spite of all the online disruption. In fact, this is a wake-up call for online players as well. Because for 14 percent customers, the return process is still a complicated one. Plus, the security of online systems is questionable too (13 percent).

With over 170 bed-in-a-box companies now and most having similar formulations, time is arriving fast for online players as well to get serious about creating differentiation that goes beyond discounts and shipping. This can become tricky for most companies



There is a pricing angle in the business that has been a pet peeve for many customers. The retail margins were too heavy for the end users many times. Now Industry has found a way to chop away the role of expensive dealers and retail overheads

as they do not own a manufacturing process or even intellectual property asset. Just outspending rivals on discounts or marketing will not make the cut in the long run. Another serious concern is the high level of customer acquisition cost as a percentage of revenue that most online players have exhibited – be it Casper or Eve. This money is not an investment but a steroid as the product lifecycle is long in a mattress industry. So repeat purchase or cross-sell or up-sell value of this cost is not too attractive.

The opportunity to disrupt and create new psychological anchors has not been realised well, in the opinion of Dharmendra Rai, a brand-marketing expert and Invisible Selling Trainer. The challengers have not handled some particular areas smartly and strongly enough. *“Like emphasis on the science in a simple memorable way. Sleep experts like Arianna Huffington & Walker (Why We Sleep author) could have been used as brand ambassadors for events, videos et al. Doctors were not used as partners. Rent-a-mattress schemes were not popularised well. Mattresses were not made cool with stylish designs & colours. People were not motivated to visit a showroom for experiential stuff.”*

Both Sides of The Bed Matter – Time to go Hybrid

If we look at the online slice of the overall pie; brutal shakeouts have occurred, and

will continue, in several sectors. This includes online mattresses, where there WON'T be 175 cheap Casper knockoffs in the years ahead, reasons Professor Len Sherman, Adjunct Professor of Business Management, Columbia Business School.

“The defining question isn't whether Casper can survive, it's how many of the cheap knockoffs will survive. The answer is VERY few!”

Online or offline, the aspect of experience and support never goes out of fashion or significance. KPMG shows that when consumers were questioned on the attributes that drive loyalty, the leading response (by 65 percent of respondents) is this – ‘excellent customer support’.

As the Amazon manager shares when asked for any advice for traditional players – *“If a customer pays Rs. 25,000 thousand for a product, s/he will not wait for 15 to 20 days to get it home. The customer hygiene factor is evolving into a converged pack of speed, quality and service. Shipping to the last corner of the country may not be feasible financially with high costs and low profits, so a local delivery system works splendidly here.”*

Note how two traditional brands like Dreams and Warren Evans had to suffer this online threat in a hard way but eventually adapted with their own

stripped-down stores and diversification in bed-in-a-box market.

Adaptation can happen, and will have to happen for all kinds of players – whether they are online or physical stores.

“People like to trust their instincts when it comes to buying new mattress. They like to see the comfort, compare with other brands and bargain to the last penny and the online market does not give such leverage, therefore, the retail market will always have an upper hand in sales compared to online avenues. But like I said - it all depends upon your approach towards the niche customer.” Nipun Gupta from Springfit Mattress adds.

So what is the way ahead? Think Omni. Think Customer-Obsession

Dr. Renuka Kamath, Professor of Marketing, at SPJIMR, Mumbai believes that a major step for the industry would be moving towards an omni-channel way of selling, by partnering with a few offline retailers to stock for display and in-shop trial.

“Webrooming is here to stay, which means consumers will go online, look for options and then, most likely, buy in a showroom - where there is a physical sense of the products as well as room for them to bargain their way to a good deal. Omni-channel is still very nascent in India and will take time to build, however this is one way



the mattress industry can leapfrog and make others emulate them. The delivery and transportation costs, which are high for the industry, can be tackled by effective omni-channel strategies."

Mr. Tushaar Gautam, Director of Sheela Foam Ltd explains how omnichannel options are considered by a few retailers. "Omnichannel means delivering a seamless experience. The major benefit that comes from offering customers an omnichannel experience is the fact that it empowers users to personalise their own buying experience. The consumer today is looking forward to the experience. While the consumer, certainly, gets impressed by the latest technologies of online; they do want to experience the products physically before making the purchase. This is one of the main reasons e-retail like Snapdeal and Flipkart have initiated to set up their offline stores in different cities. And mattress being purely an experiential and personalised preference product, we definitely want the consumer to experience the product before making the purchase.

Chaitanya Ramalengegowda, Co-founder & Director, Wakefit.co stresses that mattresses form a unique category. Ask him how we can move towards a unique online experience for the customer and he spills some fresh beans. *"It is a high-involvement purchase and is driven by the people's experience of using the mattress. Experts say that one*

cannot gauge the comfort and usability of a mattress by just touching and feeling it for a couple of minutes. A person must try the mattress for at least 14 days before they can decide on its overall experience." He cites how a 100 day trial-period, offered by Wakefit.co, helps in giving the assurance to a customer that they can try the product in the comfort of their homes and return it if it doesn't suit them.

There is one more advantage that online players have, he adds - especially the ones with their own manufacturing capabilities. *"They have the privilege of constantly hearing from the customer in the form of feedback. As a Direct-to-Consumer brand, it is feasible for companies like Wakefit.co to constantly innovate and make the products better and more suitable to consumers' needs."*

Product differentiation and translating the differentiation to the consumer, is key, affirms Dr. Renuka Kamath, Professor of Marketing, at SPJIMR, Mumbai. *"Brands need to highlight their key features and customise the product offering. This can't be done without the partnership with different departments, especially production, logistics and supply chain, internally. If omni-channel way of doing business is adopted, then IT support will be indispensable for implementation. It will have far-reaching gains."*

She adds that these players will

also have to look outwards as much as they would have to strengthen inwards. *"They will have to look at distributors and retailers differently if they want to move towards an omni-channel experience to the consumers. Trade margins will have to be re-looked to ensure the 'push' the brands require - both offline and online."*

As Kabir Siddiq, Founder and CEO, SleepyCat augurs, *"On the product side, a lot of innovation is expected to happen in the next five years. It will always become easier to get a mattress online but the physical aspect will stay. It might move the other way - online platforms will help to create a brand and reach out to the customer and then move them to the stores."*

As we can gather, new strategies and efforts are needed for both new and old players if they wish to stay relevant for the customer. Online and offline may have been two separate single beds in the industry room. But as consumer expectations evolve and intensify, we may be able to see a new and better double bed where the best of both worlds converge. The customer, can then, bounce on this bed. Like a happy child who is excited to go to sleep. Isn't that what mattress makers ultimately want! **CT**

KEY TAKE-AWAYS

Webrooming is here to stay, which means consumers will go online, look for options and then, most likely, buy in a showroom - where there is a physical sense of the products as well as room for them to bargain their way to a good deal. Omni-channel is still very nascent in India and will take time to build, however this is one way the mattress industry can leapfrog and make others emulate them. The delivery and transportation costs, which are high for the industry, can be tackled by effective omni-channel strategies."



Strange bed-fellows, really?

Handshakes and hugs of all stripes are happening in the sleep industry – if deals and developments from all corners of the landscape are any hints. Here's what is driving them and what will keep them going

"A horse never runs so fast as when he has other horses to catch up and outpace."
– Ovid

In business there are no friends and no enemies, only other horses that one runs against. There are no blinkers, only advantages that can be leveraged or handled with timeliness and smart moves. Strategic gurus of the past decades may have espoused it strongly, but this formula may not hold true in the age of the new post-digital Industrial Revolution.

In the current race of business, horses can come together to play a relay race or make a faster horse-cart. Today, it is not only ok, but also advisable to ink collaborations with partners and seemingly-far-off players. It is time to look elsewhere with an open mind and with longer hands to find strengths that

may not be one's strong suit. A big roster of capabilities, experts and market edge-points are strewn outside one's own perimeter of action – why not extend one's arm and gain from combining two different strengths in a new way? It can deliver an unprecedented synergy – or who knows, even symbiosis.

Who says an interior designer, or a luxury hotel or a doctor or an IoT app or a voice-assistant start-up or a competitor parked in another country are not relevant for a mattress company? In fact, people and advantages from different industries are now aligning with a new beauty and force for the sleep industry.

Collaborations are good, they are healthy, chimes in Dr. Renuka Kamath, Professor of Marketing, at SPJIMR, Mumbai. *"They promote an eco-system that is mostly win-win for every player. In*

fact, I would define it differently. I would say brands should actively look out for partners in the industry and beyond, to build a network that gives consumers a neatly packaged offering for sleep management or sleep healthy routine."



It isn't unknown, she explains. "A few other industries do it as a practice and it has worked well for them. The range of industries is simply amazing - from the most unlikely to those that are obvious."

"Back home again, a home-grown and a well-established company which has products in the construction space, has tied up with interior decorators, contractors, consultants, painters and electricians to build a strong impenetrable network that has worked extremely well in immensely growing their business." She illustrates the synergy effect of two different industries.

A wave is, thus, afloat in the mattress industry – redefining existing pigeon-holes and comfort-zones. It is showing its dance on all kinds of shores – three in particular – technology-inspired moves, hybrid-strategic shake-outs and geographical tie-ups.

Technology

The mattress industry is getting ahead of the curve by introducing new features and propositions that accentuate the novelty and utility factor of a sleep product. Players from both sides - technology areas and mattress manufacturing forte- have realised the power of a tech-augmented offering.

This is how and why ReST Performance joined hands with sleep technology start-up BedJet for adding temperature-control technology. What spurred this move, as company executives from ReST have shared, is easy compatibility. BedJet's technology is able to pair with the ReST Bed functionality, for monitoring sleeper's movement and adjustments to enhance the user's comfort level in real-time.

Another good example in this genre of handshakes is that of Casio and Sleep

Different brands around the world are adopting new features and technologies offering a good value proposition for the business which adds a value in manufacturing of mattresses. The companies are collaborating for better technological feature development

Number. Projector innovator Casio America Inc. teamed up with Sleep Number to create an elevated shopping experience for consumers. They aim to ensure the perfect mattress for the best night's sleep. The journey starts at a Sleep Number retailer, where a customer gets an exclusive IndividualFit 3D Imaging Demonstration to try out a bed, while watching a digital map that displays pressure points of the body. This large-screen visual happens through Casio's LampFree projection technology. So, now Sleep Number customers fall asleep faster, experience more deep sleep with fewer disturbances and experience greater relief from back pain than those with traditional mattresses, as a company release explained.

As Joe Gillio, Senior Director Strategic Planning and Marketing of Casio's Business Projector Division stated - "Our relationship with Sleep Number is mutually beneficial, as both brands aim to provide high-quality products that have been developed through technology and innovation. Our LampFree projectors are both eco-friendly and durable, giving Sleep Number 20,000 hours of run time in their stores without having to change a lamp and offering an uninterrupted in-store shopping experience."

Recently, Sleep products supplier Soft-Tex International merged with Reactex Technology Group LLC and

acquired all of its intellectual property, patents and pending patents. The thermodynamics behind Reactex are somewhat similar to phase-change material, the company said. Merging the two companies will facilitate product development and innovation, as well as add new production and engineering jobs, Soft-Tex said. With the merger, Soft-Tex takes full control of dedicated Reactex research and development and production facilities currently in Waterford at Soft-Tex headquarters.

"The acquisition of Reactex is a true differentiator for Soft-Tex and its customers," said Jeff Chilton, Soft-Tex CEO. "We are not just a leading supplier of bedding and memory foam products anymore; we're now an innovation company. Our focus has been developing transformative comfort-based technologies. Now we have a technology, resources and know-how to bring it to our current customer base and commercialise many retail sectors."

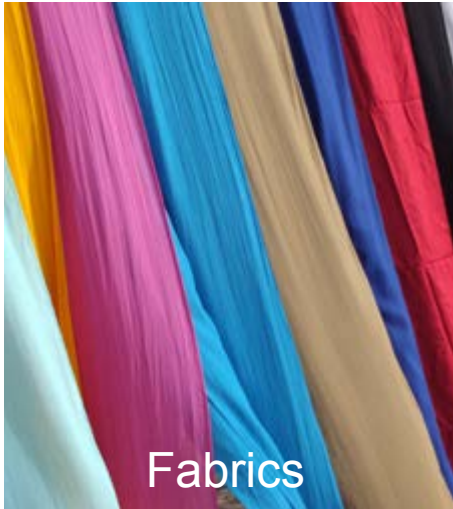
Similarly, Swedish luxury bedmaker Duxiana is injecting its high-end mattresses with Alexa-like voice assistants that will be living inside the mattress. This module will open the floodgates for collaborations with many smart-home-products. Tasks like setting alarms, checking the weather or having top news headlines read aloud would be now done with the voice inside the mattress once these technologies clasp tightly enough.

As per a company's release, the DUX Smart Module is Amazon Alexa-compatible and through the system, users can have access to their home's IoT components that are synced with Amazon Alexa, can play music, and can create unique ambience value for their environment.

Explaining the new connection between home automation and sleep, Dhaval Doshi, founder and CEO, Smarthome NX argues that sleeping, per se, is a very interesting area of innovation for the healthcare industry. "Therefore, while it is easy for you to track your sleep cycles with Smart trackers and Smart watches, there is little done to relate



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that data back to your sleeping positions and sleeping movements. In order to complete this full circle, the era of IoT-based mattresses is not far."

He distills his wide expertise across the industry and shares that he has seen prototypes by Indian companies working on sensors that can help the team understand sleeping patterns in a better way by using IoT sensors that can relay back a person's sleeping posture to an app. *"In addition, you can even automate your lighting by pressure sensors that will trigger the lights when you get up from your bed to use the washroom."*

But, perhaps, the best amalgamation of strengths is happening in the direction of sustainable sleep products. Covestro is working on developing chemical recycling technologies. It is part of the Europe-wide research project 'PUReSmart' (nine companies and academic institutions from six countries) working on creating a complete circular product lifecycle. The idea is to turn polyurethane foam into a truly sustainable material. It intends to accomplish a complete circular economy with polyurethane foams and especially post-consumer mattresses. The challenge and plan is to execute a short-term scale-up from laboratory to semi-industrial level. It would be focusing on making chemical recycling an efficient industrial process. Recently, Recticel and Covestro announced they are collaborating on breakthrough solutions to make mattresses more sustainable, including the research of raw material technologies – from mattress production to end-of-life and beyond.

If we look at Zero Waste Scotland, Scotland's circular economy experts, it is interesting to note a new project with the National Bed Federation (NBF). The two entities will work together on a three-year research project to increase mattress recycling and encourage more sustainable design.

Expertise can be tapped in non-IT areas as well to create better patient experiences. Consider how the orthopaedic range of mattresses from

"The industry needs to move towards higher value addition & product benefits. Collaborations with leading labs/suppliers across the world would help in things such as global quality certifications & benchmarking; increase of natural/renewable content in products etc."

Duroflex has developed at its sleep lab along with the renowned orthopaedists from National Health Academy over a course of 8 month's testing.

Mathew Chandy, Managing Director, Duroflex Pvt. Ltd. had explained during this launch that with back problems being a rising issue among consumers, the company wanted to offer a mattress that gives the best support to the spine. *"Duroflex range of mattresses is scientifically engineered in collaboration with senior orthopaedic experts to bring you the most advanced orthopaedic mattress available in the market today."*

Hybrid and Strategic

Collaborations are also happening between entities that were not exactly buddies so far.

Dr. Renuka Kamath, Professor of Marketing, at SPJIMR, Mumbai illustrates - A tractor manufacturing company has moved on from 'selling tractors' to 'crop management', where they help farmers to not just buy or hire the right tractors for their farms but also to guide them towards appropriate farm implements, fertilisers, and to advise on crop cycles. They aim to become the one-stop-shop for farmers.

Another good case-in-point is that

of an international pharmaceutical company operating in the renal space, which has the very famous customer activity cycle management, where they map out the customer's journey from diagnosis till kidney transplant. It has partnered with pharma companies of all allied diseases that the patient is likely to get - telemedicine outfits, mobile health provider and also with transport companies that supply the renal bags for dialysis.

This is indeed what is happening in this industry too. Take the online challenger Purple, for example. The e-commerce retailer has now expanded (after first joining hands in 2017) its distribution relationship with Mattress Firm, touching more mattress stores and launching new models with the brick-and-mortar player. The new models with hyper-elastic polymer technology were first piloted in these offline stores before being put on online shelves. It is a blended-channel approach that some other players have also started considering now.

Like an Amazon senior executive shared for this story – two-way collaborations between offline on-ground staff and online teams help in creating a better FoS (Feet on the Street) strength. *"On one hand, it helps sellers to catch up to the latest trends; and on the other hand, training deepens knowledge on what is selling, what product is working, what exchange scheme will be better and what is helping/interrupting local delivery times. Avenues like Cloudtail strengthen many local players and cut years of time in building a brand."*

Flipkart is finding new friends in the furniture space to create new strengths and customer outcomes as it moves forth. The furniture industry is forging unique partnerships to offer a differentiated experience to consumers, tells Nishit Garg, Vice-President, Books, General Merchandise, Home and Furniture, Flipkart. *"This becomes essential in the wake of changing consumers' preference, rising incomes and aspirations and the need for quality services. Flipkart, for instance, has partnered with Homelane to showcase its*



wide furniture range at five of its stores in top metros such as Chennai, Hyderabad etc. This enables consumers to create a virtual representation of a house using Flipkart Furniture through Homelane's 3D visualisation tool, creating a differentiated experience. Another example is vertical furniture player Urban Ladder which sells its products on our platform. This is primarily driven by Flipkart's horizontal presence across furniture categories, attracting vertical players on our platform."

Manufacturer Serta Simmons Bedding came with its own direct-to-consumer mattress brand 'Tomorrow Sleep' in 2017. It depended heavily on Mattress Firm, specially after the split between Mattress Firm and its earlier major supplier Tempur Sealy. But after Mattress Firm headed towards bankruptcy filing and store-closures at scale, it had to look for someone that could help in cushioning this unexpected blow. That's where it found online mattress company Tuft & Needle. A merger has been announced in the news and could create a new competitive advantage for both the companies once they come together.

Then there is California-based manufacturer Diamond Mattress that chose to find a partner in furniture retailer Bob Mills on a five-bed program

Collaboration between industry related companies can provide a better opportunity for innovation by bringing different types of experiences expertise into the business. It can provide new friends and new strengths opening new avenues for the industry to grow.

for its nine stores in Oklahoma and Texas. The president of Diamond Mattress Shaun Pennington said in a media report: "We're thrilled to have Bob Mills as a partner. Our two companies have synergies that come from having a family-owned business. Bob Mills cares about quality the way Diamond cares about quality. Together we have built a line-up of luxury beds that fit every type of sleeper."

Strategic reasons have also brought hoteliers and mattress-makers close.

Hotel maven Barry Sternlicht thought that bedding is a crucial part of guest experience. Starwood's emphasis on perfect beds and Westin's 'Heavens Bed with Simmons' initiatives have ensured that hotels find custom-made, luxury- products and high-end-marketing strengths when they create bespoke comfort with bedding players.

Geographic

Sometimes it makes sense to choose a well-anchored player for exploring a new segment and geography. Like how Kurl-on started scouting for new partners in South East Asia and China for a foray into international markets. Sudhakar Pai, chairman and managing director of Kurl-on shared at the announcement that - "We have acquired international bedding brand Spring Air. The acquisition will strengthen Kurl-on's presence in the premium bedding segment, besides enabling us to penetrate the fast-growing demand in the hospitality sector." The acquisition entailed Spring Air's operations across India, Bangladesh, Sri Lanka and Pakistan. And as the company explained, Spring Air would continue to manufacture its bedding products from its two manufacturing centres. The deal will lead it to complementing Kurl-on's existing ten manufacturing facilities.

Also look at how Sheela Foam went

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KEY TAKE-AWAYS

The current \$1.2 billion eHealth sector in India is projected to grow at approximately 68 percent CAGR. It can turn into a \$16 billion opportunity by FY-25.

Drivers: Increasing consumer receptiveness towards eHealth models and rising provider/supplier willingness to partner with eHealth platforms

on acquisition mode for a majority stake in Spanish company Interplasp SL to cement an expansion in Europe. The acquisition would give Sheela Foam a presence in Europe, the world's largest polyurethane foam market, the company said. Interplasp, has a strong presence in Spain and Portugal. It has a manufacturing facility in Yecla, in Spain, with a capacity to produce 22,000 tons of polyurethane foam and markets some of its foam to Morocco as well as some European and North African countries. The acquisition could lead to reduction in raw material pricing for all Sheela Foam Group Companies in India, Australia and Spain. Earlier, Sheela Foam Limited had acquired a Company in Australia, Joyce Foam Private Limited. It is a win-win situation. The technology that was existing in Spain (Variable Pressure Foaming-VPF) has been stated to be most advanced but also common with the one used in Joyce, Australia. Sheela Foam/Joyce help Interplasp to stabilise this technology.

This is where one can also pick the formula of successful collaborations. Sheela Foam follows the principle of not disturbing the existing structure of the overseas company. All operations - Production, Sales, and Finance and HR are handled by the continuing teams of the overseas company. Integration

happens with a robust IT system and regular interactions.

This expansion spree works from the other side too. New Jersey-based Bedding Industries of America chose its expansion into India through Repose Mattress of Coimbatore, India, as a licensee.

As the CEO Stuart Carlitz shared then, *"We are excited to join forces with Repose Mattress, a well-established manufacturer in India, to extend the reach of Bedding Industries of America. Repose is well-versed in its market and customer needs, obsessed with quality, and committed to operating in an ethical manner. We see a great partnership ahead with Repose."*

Balachandar.S, CEO, Repose Mattress Pvt. Ltd. shares how collaboration with an international player has helped the company's strategic strengths. "We have already tied up with one of the leading brands of America - BIA (Bedding Industries of India). This gives us an edge and allows us to cater to a different segment of people who might be predisposed towards international brands. The more players in this business, the merrier, especially international brands. Our consumers get a chance to check out the latest from across the globe.

More to come

The examples can go on and on – and in stranger realms. Start-up pioneer in India Wakefit is campaigning for the 'Right to Work Naps' and has partnered with Rentomojo and Cloudnine hospitals to collaborate for employee wellness.

US mattress major Serta Simmons Bedding LLC has inked a collaboration with-hip hop musician and producer DJ Clark Kent for using its comfort technology for limited-edition sneaker. Listen to what DJ Clark Kent said. *"It's not often a mattress company wants to create a shoe, but I was up for the challenge. Before this project, I had never thought to put mattress material in a shoe, but it makes sense to bring the comfort and cooling of the iComfort mattress to the sneaker community."*

The shoe uses Serta UltraCold System technology used in its mattresses that contains carbon fiber designed to absorb excess heat. It has Max Cold Fabric, made from high-performance and a foam insole that is designed to mimic the feeling of an iComfort mattress.

Sleep automation and smart technologies could be strong and ripe frontiers ahead as collaborations gather more steam. Dhaval Doshi, founder and

CEO, Smarthome NX opines that as far as real commercial applications are concerned, Sleep Number is a fantastic end-to-end solution that is a Smart bed in itself laden with sensors and an advanced app that lets you even modify the bed itself in real-time based on your sleeping habits and posture.

"Sleepwell in India is also using IoT to recommend mattresses by using sensors that can track the body of the person when he walks in to the showroom. This makes it a personalised buying experience for the customer and makes it easy for him to make a choice for the right mattress."

In the future, he would love to see fitness trackers working closely with data from mattresses as well as user data to suggest the right kind of postures for sleeping and more such information.

"In addition, I can't wait for all these solutions to be voice-enabled; so imagine when you say "Alexa, I am going to sleep", your bed gets warm, your AC turns on at a specific temperature, your security alarm gets armed and your lights turn off - all with a single voice command. As system integrators, Smarthome NX strives to build such solutions for his clients - given the right technology, we can do wonders for our clients."

Nipun Gupta, Executive Director, Springfit Mattress points out that many global players want to enter Indian Market, In fact, many of them are already collaborating with local mattress manufacturers.

"It's too soon to say if Indian customer is or is not ready to pay premium prices for an international brand name, knowing that the mattress is made in India. But such collaborations will increase the standards of mattress manufacturing. Imagine having the ability to influence and make changes in the standard of living for your customer with breakthrough branding-initiatives! The mattress industry will adapt with best manufacturing practices, with an enhanced ability to educate society and to provide world standard certifications on materials. Such business collaborations will enhance the industry with better

Opinion

Collaborations are due on the product level as well.

As an OEM player from Indonesia lets on - Mattresses are fast evolving from being a commodity item to being looked at as a carefully-crafted work of art. The modern - more discerning - customer is taking extra care when exploring the different attributes of mattresses to find the one most suited to his needs. Naturally, it is the ticking that is first seen and felt by a customer, which makes it an influential aspect of any mattress's purchase. That first look at a mattress can trigger the potential customer in the right way. Therefore, a lot of decisions are made at the manufacturer's level before even being displayed to the end consumer.

He illustrates how using the right technique can elevate the product for an end customer who knows what fabric and experience s/he wants. "Look at 'Woven versus Knitted' Ticking. Knitted fabrics feel smoother as a customer runs his or her fingers across the fabric. They feel softer to the touch with that first tentative push of the mattress as the customer tests the firmness. That makes knitted fabrics the predominant choice of mattress manufacturers but that doesn't mean it is the only choice. Different brands distinguish themselves by using a variety of types of ticking. For example, entry-level mattresses often opt for printed

woven fabrics, and as the MRP gets higher, jacquard-woven ticking with various backings can be used as well. There are also many high-end delicate woven fabrics that can be used on premium mattresses. There is also a sort of hybrid fabric that tries to get the best of both knit and woven ticking. The fabric is smoother, softer and more stretchable than woven as well as being stronger and more durable than a knit. Knitted ticking is typically considered the highest end of the mattress fabric's spectrum. However, knit ticking requires a high level of maintenance - from the production stage right up to the end consumer use as, otherwise, the mattress will lose that fresh look - causing customer dissatisfaction."

This is where collaborators can jump in and fill the blanks that fabric quality of a mattress faces right now in many segments.

He shares that ticking is to mattress as the skin is to our body. It has the ability to make a bold statement about the mattress, which is why a lot of time and energy is invested into selecting the perfect ticking to complement a mattress. Luckily, ticking suppliers are ready with R&D and continuously innovating design concepts to support mattress manufacturers.


Source: Jacquard Fabrics / Textile, India / Thailand

communication and data sharing within organisations. Local manufacturers will get the benefit of increased operational efficiencies and better-educated, more professional employees."

But the best outcome, as he captures well, is that in the end, this will affect the end user. *"All these processes mentioned above will eventually save time and cut down manufacturing cost. Customers will get a better quality at lower prices and enhanced customer services*

with streamlined systems and processes to serve them better."

This is just the first lap of the race. More and more batons would be passed on ahead. Hospitals, artists, athletes, start-ups, environmentalists, hotels, colleges, engineers, architects - you never know where a mattress-player can find or deliver value next.

A collaboration with Netflix, a mountaineer or a milkman? Who knows! 

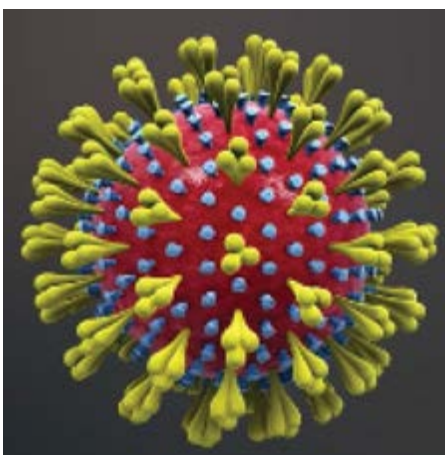
Here's how the Indian mattress industry is coping with COVID-19

Coronavirus epidemic has completely shaken up the global economy. From the aviation sector to the banking sector, nothing has escaped from the impact. Here's a look at how the mattress industry is coping up with epidemic and what all steps it can take to mitigate the impact.

In all the bizarre stories that cropped up over Coronavirus or Covid-19 — from drinking cow's urine to performing Yoga asanas — one stood out. Arihant, a mattress company, based out of Mumbai, claimed to have come out with a way to beat Covid-19 pandemic. It had launched an "anti-coronavirus mattress," priced at Rs. 15000. The mattress was also stated to be anti-fungal and anti-allergic. To promote the same, Arihant placed adverts in Bombay Samachar. Almost, immediately, the backlash started against the company. The mattress maker was relentlessly trolled over Twitter for its fallacious, complaints were raised. Finally, the police in Maharashtra also filed an FIR against the owners of the company for making such claims.

The lesson is simple and straightforward. Coronavirus pandemic is a serious affair; it should be treated with all the seriousness it deserves. People are worried, and a bit paranoid, anything that tries to capitalize on those fears will not resonate well with the public at large.

Raghav Menon, Executive Vice President (Mattress Division), Sobha Limited, states the same unequivocally. "The advertisement on the coronavirus-resistant mattress was not merely false marketing, but also it breached an ethical code. Trying to take advantage of such a situation is totally uncalled for. And, even Indian Sleep Products Federation (ISPF) would not stand by on something like this. I can understand aspects like anti-allergenic, anti-bacterial, Aloe-treated, neem-treated, etc. but claiming it to be



coronavirus-resistant is wrong and in bad taste," he stated.

The coronavirus epidemic could not have come at a worse time for the world at large and India in particular. After a relatively subdued period, the economy finally seemed to be looking up. Experts were hoping that the year 2020 will bring new cheer to the economic scenario, the markets were looking up, and the inflation was at a record low. And then out of the blue, the Covid-19 emanated from Wuhan and took the world by storm. From Hong Kong to Honduras, from Delhi to Denver, the spread of the virus was quick and lethal. A couple of lakhs of people are infected, and thousands are dead. As a result of the spread, various governments across the globe have forcefully imposed a state of shutdown to curtail the spread of the virus. The lockdown has brought the economy to a grinding halt.

So, what will be the impact of this coronavirus-imposed shutdown on the mattress industry?

The damage could run deep. The mattress industry had been waiting for good times almost throughout the year of 2019. "The crisis has impacted us bad. We were hoping to make up the revenues in this final quarter of fiscal year 19-20. The last year was pretty challenging, and we were hoping for a breakthrough in 2020. But now, those hopes have been undone. I am fearful that the overall mattress industry could compress by 5 to 10 percent in value if things don't improve soon," said Menon.

The impacts are already visible, especially on the retail side, where the customers seem to have all but disappeared. Purshottam Malani, CMD, Century India, talks about the same, "We have seen a sharp drop in footfalls in the showroom, almost 60-70 percent drop in the business in the past few days. There's hardly any movement of goods in the wake of the virus outbreak."

Concurs Deepak Mehta, MD, Sweet Dreams, Ahmedabad. "There has been a significant fall in customer uptake in the last 3-4 days. The slowdown could be impactful till March-end or even in April," he stated.

The lockdown will have far-reaching impacts. Take the case of Mumbai, which is the financial capital of India and under a state of lockdown. "The scenario is pretty grim in Mumbai. There is hardly any movement of goods. Retail shops are shuttered. There are limitations, even in the movement of staff. The volume of sales has dropped drastically below 50 percent of normal," says Anshuman Dash, Senior Marketing Executive, Nilkamal.

Most of the companies have in accordance with the guidelines, have also asked their staff to stay away from the office and operate from home. Take the case of Respose Mattress in Coimbatore that is changing its functioning. *"We are concerned about the scenario. And have stopped the night-shift to curtail production. Also, we have asked all are the non-essential staff like sales and marketing to stay at home and work from there. The situation is dire, and we are trying the best,"* said Ramnath Bhatt, CEO, Respose Mattress.

The story is much the same for Cord on Foam Products in Tamilnadu. *"We have reduced the working hours for the staff, and have stopped the night-shift altogether. With the demand turning into a trickle, we are now working with our existing inventory,"* said Hari Rajan, MD, Coir On Foam Products.

But just like every dark cloud has a silver lining, so too is the case with the mattress industry. While the actual sales from the retail establishments might be impacted, the online channel could bring some cheer. Many experts believe that with people confined to their homes for an extended period of days, they will be looking at ways and means to make their stay comfortable. Of the many things that could come up for an upgrade is a mattress. And this could be an opportunity for the industry.

Ankit Garg, Founder, CEO, Wakefit, believes that online sales could take some pressure off. *"We have seen a spike in online orders. While there is some hindrance in the movement of the goods, yet the free delivery option is an added attraction. Interestingly, many customers are opting for delivery in April to be on a safer side,"* he said.

The mattress players need to use this lull strategically. They need to enhance their marketing and advertising footprint and promote the connection between proper sleep and mattress. Secondly, they need to emphasize the fact that the online channels are still available for customers looking to order a new set of the mattress. While making any false claims is a strict no-no, the messaging

Many experts believe that with people confined to their homes for an extended period of days, they will be looking at ways and means to make their stay comfortable. Of the many things that could come up for an upgrade is a mattress. And this could be an opportunity

could be a creative nudge towards better rest and its connection to better sleep.

Also, this would be an excellent time for mattress industry players to ramp up their efforts in the digital space. While many players already have an online shop, it would do well if they were to use innovation to create new engagements with the customers. For instance, a web-series that features experts on how to live well within the confines of the home, etc. Also, in terms of the products, new innovative launches like the bed-in-a-box could be a nice move to attract new customers. Through all, it is imperative to reassure the customers about the best business practices that are being undertaken to ensure that the products that reach the customer's home are neat, clean and virus-free. A specific strategy should be built around how to ensure that the products and the people who deliver them are prim-prom.

Take the case of Duroflex in Bengaluru that has taken extra efforts towards hygiene and cleanliness and is now seeing the results. *"In some posh areas like Indira Nagar in Bengaluru, there is a spurt in sales where the showrooms are clean and sanitized. All the show room staff is equipped with masks and sanitizer. All the beds displayed are sanitized for the benefit of consumers. Many consumers have appreciated this move and have also*

preferred to buy because of guaranteed protection given to the mattress," said Shrijit Nair, Marketing Manager, Duroflex.

Besides, there is also the human story that needs to be kept in view. Given the fact that Covid-19 has severely impaired the economic functions, there is a high human cost that is associated with it. Due to a lockdown, a whole host of individuals will be impacted, whose livelihoods are directly dependent on the business. There are employees, permanent and on contract, people in the supply-chain, the staff at the offices, and so on. With the lockdown in place, these individuals will be worried about the impact on their incomes. It is at these moments that companies can show compassion and humanity. By assuring the community that the stall will not impact their earnings, it would help alleviate the concerns that must be troubling these individuals.

Take the case of Casper Sleep Inc. in the US. The mattress company announced the temporary closure of its retail stores in the US. But while making the announcements, the company also emphasized that the retail store employees will be paid for all the scheduled hours during the closure. *"Our top priority is to do the right thing for the health and safety of our employees and customers. This is an unprecedented time, and we have elected to close our Casper Sleep Shops following the guidance of public health authorities. We're committed to the safety of our community,"* said Philip Krim, Chief Executive Officer, Casper.

Finally, everyone is hopeful that with time, the disruption brought by Covid-19 would be a thing of the past. Based on positive inputs of the government, the economy will surely see resurgence after hitting rock bottom. The crisis is time-bound, and will surely pass away. *"I expect a big bounce-back once the Covid-19 effect dies down. In a matter of months, our economy will be back with a bang, and so will the industry. My advice to the retailers would be to shore up their inventories for the good times,"* states Menon.

Tough times don't last, tough companies do.



Mr. Purushottam Malani, Chairman & Managing Director, Centuary Fiber Plates Pvt. Ltd.

The mountain-top view – Great! but there's a lot of walk before that

Along with well-stitched maps and strategic footwork. Let's see what makes Centuary the top-crust player of the mattress industry today – right products, right timing, or both?

Years of wisdom and first-hand industry acumen seep through **Purushottam Malani**, Chairman & Managing Director, Centuary Fiber Plates Pvt. Ltd, and effortlessly, whenever he sits down to share anything about the mattress industry. After all, he has ascended a lot of rocks and found a lot of tricky, but friendly, wedges on the uphill path to being a top industry name. In this chat, he looks across the valley of the future and lets us on what he sees as defining turns ahead – components, new segments, manufacturing capacity, and more. Step up.

Q After such an interesting and challenging (and almost-entrepreneurial) journey from the inception till now, what do you think is the next tipping point in terms of strategy for Centuary ahead? Where do you see the next strategic X-factor emerging and how are you planning to set the direction henceforth?

We are working on some key areas ahead. These would be crucial points that will drive our strategic momentum with the right velocity and direction. We are focusing on Retail upliftment and Salesman Training. Consumer focus is a salient area too that is a part of this radar we are now looking into.

Q What is the role of a strong manufacturing capacity in your market strength?

This area plays a significant role and we keep deepening our strengths here. We continue to add capacities to support our growth planning. We also invest in retooling and automation for better quality & production efficiencies.

Q Do you feel that manufacturing is a major strategic factor in this industry?

All I can say, as per my observation and experience, is that none of the manufacturers make all the components of a mattress product. This is a crucial part for any industry player. We are the only ones that do it in-house. We have strongly upgraded our manufacturing capacity in that context.

Q How significant is Cenflex, the PU foam part of business to your current leadership advantage?

We are proud of its journey and direction. Cenflex has quietly occupied a space somewhere towards the top of the demand pyramid with a high quality product at an affordable price. It has helped our retailers and channel partners stand out from the cluttered market.

Q What makes you stay a pioneer in so many areas - some of the first quality certifications, foray into baby and luxury segments and tapping demand from ancillary segments like schools?

Continuous improvement & innovation is part of our organisational DNA. We have always challenged ourselves to be a step ahead of the curve whether it is in our high-end machinery; our innovative product offering; or our brand and market positioning. This thirst for being the best and being creative keeps us excited – whether it is in terms of product portfolio or new industry strengths.

Q While it can be an innovation tick-box of the highest gravity, it can also be difficult to bring in something radical in the market? How do you approach any new segment that you introduce in the industry?

We spend a lot of effort in educating our partners and equipping them with proper facilities. Display is a significant part for any new segment. Fabric choice is also an important element. We want people to learn to differentiate between different types. It does not suffice to just usher in something new, it is also vital to ensure that people are equipped to

embrace it without any friction or gaps.

Q What was the strategy and outcome of offering accessories as a strong addition in the mattress market?

It has helped deepen our retail penetration and also reach many more consumers. Since the average lifecycle of a sleep accessory is typically 1 or 2 years (as opposed to 11 years for a mattress); accessories help us stay engaged with our consumer base; and continue to keep the brand relevant and top-of-mind for the customer. Moreover, it allows the retailer to increase their ticket value and margins.

Q Any plans of venturing into new segments like old-age demographic or athletes after your foray into segments like children-products?

We, at Centuary, have categorised our target consumers into 5 distinct demographics; and will be working towards maintaining our product leadership across these segments.

Q Tell us something about your observations of the Southern market in India? How different, attractive and challenging it is?

The southern market is more organised & structured than some of the other geographies; with slightly larger format retailers/outlets; and a greater awareness for the product and sleep domain. It also exudes a somewhat higher degree of standardisation. Having said that, these markets are

The southern market is more organised & structured than some of the other geographies; with slightly larger format retailers/outlets; and a greater awareness for the product and sleep domain. The biggest change is the range of offerings that the customer has now

most saturated with regional players and 'commoditisation' of mattresses.

Q What should industry players watch out for when converting any unorganised geographical segments into organised ones - what you can share from your experiences?

The one major pitfall to avoid, which can have long lasting repercussions is - playing with the quality of materials or the product. Downgrading quality standards - to control costs and, hence, be more price-competitive against the unorganised segment - is a myopic approach. Such an attitude can often lead to long-term erosion of goodwill

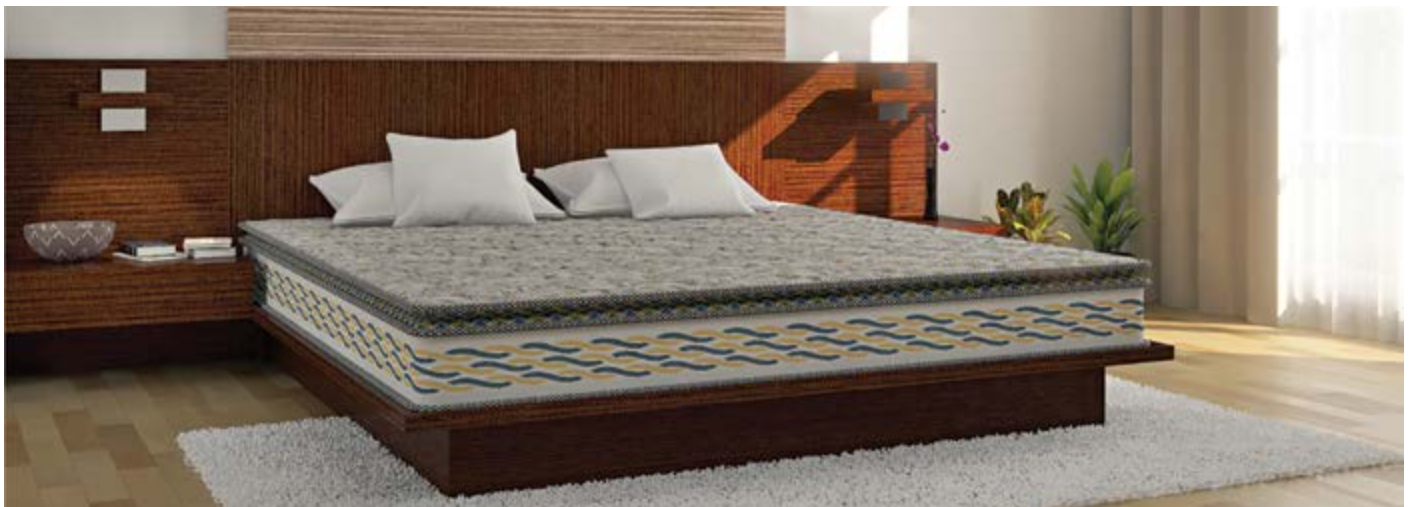
and trust. It can undo years of hard work put in by industry pioneers in educating the consumers on investing in better mattresses. This must be avoided.

Q You have spent so many years and seen so many twists and turns in this space. What is the biggest strategic shift that the industry has undergone or is going through - in your reckoning?

To my mind, the biggest change is the range of offerings that the customer has now. Today, there are so many choices given by every manufacturer. Earlier, this was limited to a few combinations of foam and coir. Now, a mattress has a lot of components - six on average. The combinations that come out of these components are also huge. This rise in the number of components is also a challenge for manufacturers.

Q What is on your dashboard next? Any new strategic plans for the future?

For the last 20-25 years, we have seen a CAGR (Compounded Annual Growth Rate) of 15-16 per cent. From the next year, we are shifting gears to 20 per cent. It is the right time for established players like us to take advantage of the industry momentum and potential. We are adding capacities in Bhubaneswar and Hyderabad (we intend to raise capacities up to 50 per cent). We aim to get to a level of over 2000 mattresses every day. We will also continue to bring new innovations and cater to new segments in consistent and radical ways. **CT**





To go into bed-in-a-box market or not?

The mattress-in-a-box is a concept which has been introduced into the market in recent days. Let us take a look at the pros and cons of this concept and will it work well for industry or not?

A look at what aspects should mattress companies consider before getting headlong into the trending Mattress-in-a-box concept. Pros and cons of this concept. While it is an excellent idea for the millennial and budget buyers, does it work well for the manufacturers?

When the consumer is scouting for a sleeping mattress, he or she is spoilt for choices, in many parts of the world. Yet, while the range of choice isn't baffling, but the access to experience the quality and fitness to one's taste is.

Mattress companies have long learnt that consumers are extra cautious to the extent of being religious about their sleeping mattress. Actually, we come across several shades of consumer behaviour. However, there are two prominent ones to take note of. One, the consumer who does extensive research, jumps from store to store, surfs from website to website, compares, asks friends, and finally takes a decision, not after considerable labour. The second variety of consumers gets numbed out because of the enormity of the task.

The act of scouting and picking the right mattress is a horror to these consumers.

Some mattress companies sought to solve the problem in innovative ways. However, it was left to the neo-entrepreneurs, the digital natives to come up with an innovative solution—the bed-in-a-box concept.

Just imagine this: You are shopping for a mattress, you look around on the web, sometimes you hop into a nearby store, but go back home and order the mattress online, and it arrives on your doorstep compressed to fit inside a box the size of a teapoy in your home. It's all online, a store visit probably but not to buy. Nobody ran after you with a sale pitch. In one swift stroke, the act of choosing and shipping was simplified.

The bed-in-a-box was invented by a machinist from Johnson City, Tennessee, in the US in 2007, much to the popular belief that it was the mattress company Casper which introduced the concept. Bill Bradley, founder and CEO of Bed-in-a-Box, built a machine that could compress and roll foam mattresses to a size small enough to fit in a shipping box. He trademarked the name and ran with it. However, Bradley's *bedinabox.com* failed to create any flutter in the market. The mattress industry continued to be dominated by long-established players like 1-800-Mattress and Mattress Firm. Not until 2014, when Casper discovered the virtues of compression technique and started offering bed-in-a-box concept on its purely online stores did the market wake up to the innovation in mattress buying.

More companies backed with the movement with investments, like Tuft & Needle latched on to the idea giving online buying a new lease of life that drew the attention of the shoppers who began to wonder seriously: why shouldn't my next mattress be from an online store?

What works?

Purchase innovation: From the consumer point of view, bed-in-a-box concept has changed many things on the ground. The idea of ordering a mattress

Recent surveys have shown that the longer people try out a mattress before buying it, the more likely they are to be satisfied with their purchase. However, a bed-in-a-box concept prevents this opportunity

online, the same way you make a purchase of a smaller household item, is a novelty, and definitely has contributed to the strong growth in the past years. The process is easy with many bed-in-a-box players offering free shipping, and relaxed trial periods—usually two months or 100 days—and convenient return policies.

Comparison shopping eliminated: Ease for the consumer to walk in and buy a mattress without worrying about all those comparisons between other options is what makes bed-in-a-box concept stand out. From a manufacturer's point of view, it is simple to make a sale, as compared to carrying unnecessary inventory and related overheads just in the name of choice.

The grey areas

Consumers have long believed that to experience the mattress in a store before buying is key to informed buying. Recent surveys have shown that the longer people try out a mattress before buying it, the more likely they will be satisfied with their purchase. However, a bed-in-a-box concept prevents this opportunity. Though many companies today offer an in-store experience complementing online purchase; yet the consumer's niggling doubts may not be completely answered. It may click with the millennial, but a 30 plus population may not be latched on to it.

Trials and returns increase when compared to an in-store purchase. Since there's a long trial and return period

associated with online shopping these days, it throws up some unintended complex issues. From an accounting perspective, the retailer cannot book it as sales until the period is over and has to handle the transportation and return back process in case of returns. These are additional overheads.

Shipping when a mattress is purchased is often free, adding to the cost to the retailer. But for additional fee companies can now offer white-glove deliveries, similar to the services offered by a traditional retailer. On the flip side, the price of the mattress is fixed and there is no haggling.

A bed-in-a-box mattress is usually a foam one, which is compressed and rolled and/or folded for shipping. Most manufacturers recommend unboxing a new mattress within a month or two after it's delivered. If the consumer is setting it up them self, then they have to follow the steps outlined by the manufacturer. The process itself is quite involved. Again, age matters a lot here. Millennials may enjoy the process of unboxing, laying it out and wait for the mattress to regain its original shape and form. Whereas others may do not want anything to do with it. The built-in DIY factor of the concept may become the biggest hurdle.

The most significant issue people have often cited is that the materials in new mattresses can give off an odour, some of which is caused by the breakdown of volatile organic compounds (VOCs) in the foam. More research is needed to determine whether or not there are any chronic health risks from long-term exposure to VOCs in mattresses, expert caution. The odour should dissipate in the air within a few hours or, at most, a few days. So until then, the new mattress is not fit to sleep in. You may want to wait until the odour goes away to sleep on your new mattress. And the obvious big questions: Is the odour harmful to children?

Other questions

How long do boxed mattresses last? A well-designed boxed mattress is said to last as long as a traditional



regular mattress. Some bed-in-a-box mattresses come with a 10-year warranty—though the mattress industry suggests that the mattresses be replaced after eight years. Also, many mattress manufacturers claim to have their design independently tested with leading third-party testing facility for durability and other criteria, which gives consumers a lot of confidence that it will be a good investment.

Will boxed mattress become hot at night? A question that is understandable since bed-in-a-box is mostly made of foam. However, experts point out that a well-designed boxed foam mattress will be as fresh as the equivalent traditional foam mattress. The first boxed mattresses that came out were mostly made of memory foam, which is notorious for making hot sleepers feel even warmer than usual at night.

Luckily, these days, most companies use different layers of foam to create channels that will keep consumers cool. Because foam mattresses tend to become a little warmer than traditional inner-spring mattresses, the many bed-in-box mattress are designed with two key features to promote a cooler sleep

There are few questions raised in the concept of Mattress-in-a-box. Technically the answers are to be found for the better performance of the business. Also customer needs awareness on the concept and its worthiness

environment. The top layer of foam is usually a new generation — and more expensive — of very breathable foam that helps air circulate and keep consumer cool, and the fabric cover usually sports an 'adaptive' treatment (similar to athletic clothing) that helps improve moisture evaporation, which is said to help the sleeper.

So, is getting into boxed mattress worth it? For the consumer, it is a good idea to try one out (at a friend's or a

store) before making the purchase. But even without testing one first, if one is on a budget and does not want to deal with salespeople at a mattress showroom and does not have any super-specific support needs, then it's worth a try. Since most of the bed-in-a-box companies have generous trial periods, at worst, the consumer will end up getting a refund and getting a traditional mattress, but at best, and will have a hassle-free experience that costs thousands of rupees less than buying an inner-spring mattress.

The advantages listed above from a consumer perspective are precisely the reasons a manufacturer should think twice about this concept. The trial periods are longer. Only budget buyers will be more inclined to buy off the web. The retailer should invest in a physical store and a web store to make the buying experience complementary. And most importantly, does bed-in-a-box fit the manufacturer's long term design goals. One last thing. The promise of native digital buying has not exactly turned into a great business. It is an innovation which has fared well but has not disrupted the traditional market in a manner that it was expected too. [CT](#)

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Mr. Balachandar.S, CEO, Repose Mattress Pvt. Ltd.

Waking up and staying fresh, is a lot of hard work

Mr. Balachandar.S, CEO, Repose Mattress Pvt. Ltd.

shares his thoughts on why betting on fresh ideas and geographical expansion is adding springs of new growth and market strengths for Repose

Q Can you share something about the journey of Repose so far? Anything exciting about the next tipping points that mark your strategy ahead?

The first thing we focussed on is getting our brand positioning correct and so the core team spent a significant amount of time on this exercise. Finally, we arrived at something all of us were happy with and also found it to be distinctive from other brands in the category. We took on the platform of 'Fresh Ideas' which we felt was relevant to this era because ideas shape the world. The creative expression of this was 'Wake up to Fresh Ideas'.

In alignment with this thinking, we launched a few innovative products such as 'secret locker in a mattress' and 'memory foam music pillow' which were the first-of-its-kind offerings in India. We continue to think on these lines and are always hungry to come up with newer products and delight the consumers. This constant hunger and search for surprising our consumers is what we feel will create that love between us and our consumers.

Q How important have distinct geography expansions like Western India, been for the

direction of the company?

After having been around in South for over 5 years and after being reckoned as one of the brands in the consumers' consideration set, we decided to spread our wings into Western India. The first thing we did was set up a factory in Chakan before going to the market. We did this only because we wanted to instill confidence in our channel partners that we are dead-serious about this business and wanted to be seen as one of the major players in the coming future. We are sure of doing well here because the market is largely non-standard sizes and we are able to give fantastic service by delivering the mattress in the shortest possible time.

We are currently present in Maharashtra, Madhya Pradesh, Goa, Gujarat, Odisha and planning to start soon in Chattisgarh, Uttar Pradesh and Rajasthan. More and more people sleeping on a Repose mattress makes us happier.

Q Any specific segments like hospitality or spinal-health that turned into a focus area? Why?

Yes, we have different segments that we focus on. One of the segments is hospitality because people are more

aware these days thanks to Internet, travel and media. A key factor that makes a stay comfortable for the guest in a hotel is the quality of sleep. Hence the quality of mattress plays an important role. So we understand that and have a dedicated team focusing on the hospitality segment. As you know very well, these days' people lead a very sedentary lifestyle, especially in cities and bigger towns which causes a huge problem - backaches. So we have a huge range of products with a combination of spring, memory foam and latex to take care of their backs and give them the required rest to take on a demanding day ahead of them.

Q What has been the impetus for new concepts like Sleep Stations?

The idea of Repose Sleep Station is two-fold. One is to give consumers an international experience of buying a mattress. Here, you can lay down on a mattress and check the comfort you like. Otherwise, in most places, you have mattresses stacked like books in a very cramped area where one can't lie down on a mattress and check it out.

The other reason is to showcase entire range of our mattresses which we otherwise can't in a multi-brand environment. **CT**



weary Westerners or the Europeans, there are scores of Indians who are taking sleepcations or planning out their next one.

Sleepcation: How the hotels can milk it

Generally, the world over travelling is a seasonal affair. Besides the corporate lot that travel for meetings or conferences; the general population commutes on holidays, and vacations. The time frames are largely set. For instance, the families in India will travel during the summer vacations when the schools are closed, or they would explore during the longer break towards the end of the year. Generally, these time-frames are termed as the “*peak season*” for travel in India.

The hospitality industry has been grappling for long with the seasonal travel phenomenon. They have a short time-window during the peak season to earn money, and for the rest of the year they function on less-than-full capacity. The hotel industry has taken various measures to even out their earnings during the off-season, by promoting corporate travel, offering impressive discounts and deals during lean periods, etc.

Yet, despite all these efforts, the variability between room-bookings during season and off-season has not really diminished.

Sleepcation can be a good opportunity for the hospitality industry to generate revenues in the non-peak season. Since there is no set pattern or timeframe for sleepcation, it isn't seasonal and can be promoted throughout the year, without any hindrance of time and frequency. Also, unlike traditional vacations that an individual will take once or at twice a year, sleepcation is something that can be undertaken numerous times through the year. Given the harried nature of corporate life, individuals can be enticed to de-stress by taking multiple sleepcations. In fact, sleepcation can be a great part of the work-life balance movement that seeks to balance work life with personal enjoyment.

The hospitality industry should

SLEEPICATION

Here's how sleeping can be good for the business

There's a new term that has been added to our lexicon, it is called as sleepcation. Not part of the Oxford Dictionary yet, but largely it can be defined as an escape to a resort or perhaps a quiet local hotel to just sleep and rest. So instead of travelling, commuting and exploring, all the vacationers do is eat, sleep and relax. Mostly, sleepcation are for those over-worked corporate souls that are burning both ends of the candle through the week, missing out on sleep. On the holidays, they could just check-in to a beautiful resort and then catch up on the winks they missed. No wonder sleepcation is especially popular with the blue-collared lot.

Mind you, sleepcation is not

something to be taken lightly. It is serious business, with the working professionals, who after putting their five days and endless hours in corporate work, book rooms at high-end hotels and just head out to sleep, relax and unwind. By the way, these sleepy retreats are not your regular business hotels or resorts; these are luxurious places that pamper your body and soul, getting it charged up for the coming week. They are called sleep retreats.

Sleepcation as a concept has emerged fairly recently in the past few years and has grown in strength. The barometer of success can be gauged from the fact that tour operators are now offering sleep packages to travelers. Sleepcation is not just exclusive to the

latch on to this trend and work towards making it even bigger and grander. Using their marketing and advertising prowess, they need to promote sleepcations at their properties. They should work towards making the stay comfortable for the guest, as much as possible. And they should communicate the benefits of healthy sleeping and its connections with overall health to prospective customers.

As the trend of sleepcations becomes stronger, it will help the hotel industry deal with the seasonality of the bookings. During the peak season, they could tone down the sleepcation promotion. And once the off-season starts, go all gears on it.

The play for the mattress industry

So how big is the sleepcation industry? Well, there are no direct answers to it. But the fact is that it is a rapidly growing space, evident from all the sleep retreats that are popping up across the world. Sleepcation or sleep retreats are considered a part of the wellness industry that is worth \$4.2 trillion annually.

With the evolution and expansion of the sleepcation, the mattress industry has a lot to gain. Considering that at the very core of sleepcation is phenomenon of sleep and the mattresses are the very instrument that promote sleeping and wellness.

Sleep retreats or hotels that wish to promote sleepcations are extra conscious about the mattress in their rooms. Since, there is an undeniable connection between mattress and quality of sleep, hotel management cannot risk comprising on the quality of the mattress anymore. If they wish to charge a premium for providing comfort, the hotels need to also invest in high-quality infrastructure, especially the mattress.

There's ample evidence that lot many hotels are already conscious of this aspect, and have started to invest in high-grade comfortable mattresses, to ensure that their guests are completely at ease.

Some sleepcation destinations

Four Seasons Resort in **Bali** has you lie back in a hammock. At the same time, a Buddhist nun will tell you stories from Buddha's life or Jumbo Stay Hotel at **Stockholm**, Sweden, where you sleep in an actual plane that has been converted into a hotel. And if that is not exotic enough, you have travel to the Manta Resort, located on the Pemba Island in **Tanzania**. It has an underwater room glued to the ocean floor some 800 feet below the shore.

There is a retreat in Bath, Somerset, **UK**, that is renowned with sleepcationers. The specialty of the retreat is a renowned Clinical Hypnotherapist Fiona Lamb who will run guided meditation and hypnotherapy sessions, which aim to create fundamental shifts at an unconscious level to bring about long-lasting changes to your sleep habits. In addition, there's a plentitude of sessions if you willing to move out of your bed, like sound therapy, equine-assisted therapy and Qi Gong, yoga sessions and forest walks too, all with an aim to help you sleep better.

On the domestic front, there is a charming hamlet in Himachal Pradesh called **Nako**, which is renowned for its striking silence.

Rishikesh, though now a bit crowded, still has its charm in the flowing Ganges and the hills as the backdrop.

Gangtok is another beautiful locale nestled in the Himalayas; it offers various retreats that can be an excellent choice for a sleepcation. If you want to be closer to the sea and sleep to the lullaby of the sea, **Ganapatiphule** in Maharashtra is a great location. Far from the madding crowds and very alluring for the body and mind.

If you feel the urge to sleep in the wild, India has one of the most abundant bio-diversity in the world. There are over 50 tiger reserves in India, the last home of the Royal Bengal Tiger. Any sanctuary closer to your home can be a pleasant retreat. Meanwhile, if you wish to sleep amongst the roaring lions, the Sinh Sadan lodge in Sassan Gir in **Gujarat** can be a great location. But you will have to book the place much in advance.

Meanwhile on the international front, there is this Tiger and Lion Lodge at Port Lympne in the **UK**, which has a lodge right inside the tiger enclosure. So, you can sleep and wake, watching a tiger at your glass window. *"Sleep within a whisker of tigers,"* says the advert.

The mattress industry could latch on to this opportunity and actively promote the idea of sleepcation and its connection to comfortable mattress. Players could tie up with hotels and create sleeping suites, that will be the epitome of luxury. The industry should also play aloud the connection between sleep and the quality of mattress, thereby coaxing the hotels to invest and upgrade frequently.

With the hotels spending more on mattresses, industry will grow and become bigger. Also, there can be an additional gain. Since most of the sleepcationers are likely to be domestic populace, they could be prospective customers for these very mattresses. Once, they are satisfied at the hotel,

they would be inclined to buy them for their home.

This could be a win-win for the mattress industry in every way.

In the end, with the rise in lifestyle diseases like diabetes and hypertension, everyone needs a break to rejuvenate. Especially, if that break entails spending time in a luxurious bed and catching up on much-needed winks that they have been sacrificed at the altar of work. Next time, when you see a long holiday on your corporate calendar or want to burn a few of your PLs that might get lapsed anyways, head down to a sleep retreat and snore away to glory. **CT**



The summer mattress – What a cool idea!

Mattresses made for specific needs have a way of creating a strong niche. How strong is this when it comes to dealing with Mercury?

Ever heard of that King with a Summer Palace? Ever been to that Viceroy's summer abode that you, now, call a hill station? Isn't it fascinating that having a summer option was the mark of such luxury and distinction back then?

Wait! Has history changed its pattern at all? Not when we look around in the mattress market. It took some time, but even here we now have what we call the 'summer mattress'. It may not be a luxury but it is a distinct segment for sure.

These are mattresses that have been specially designed to relieve their users of the heat, discomfort, perspiration and posture problems that come with the hot months. Their usefulness can be ascertained in the sleepless nights that people in tropical regions suffer on account of the heat that compounds in the summer season when they sleep on a conventional mattress.

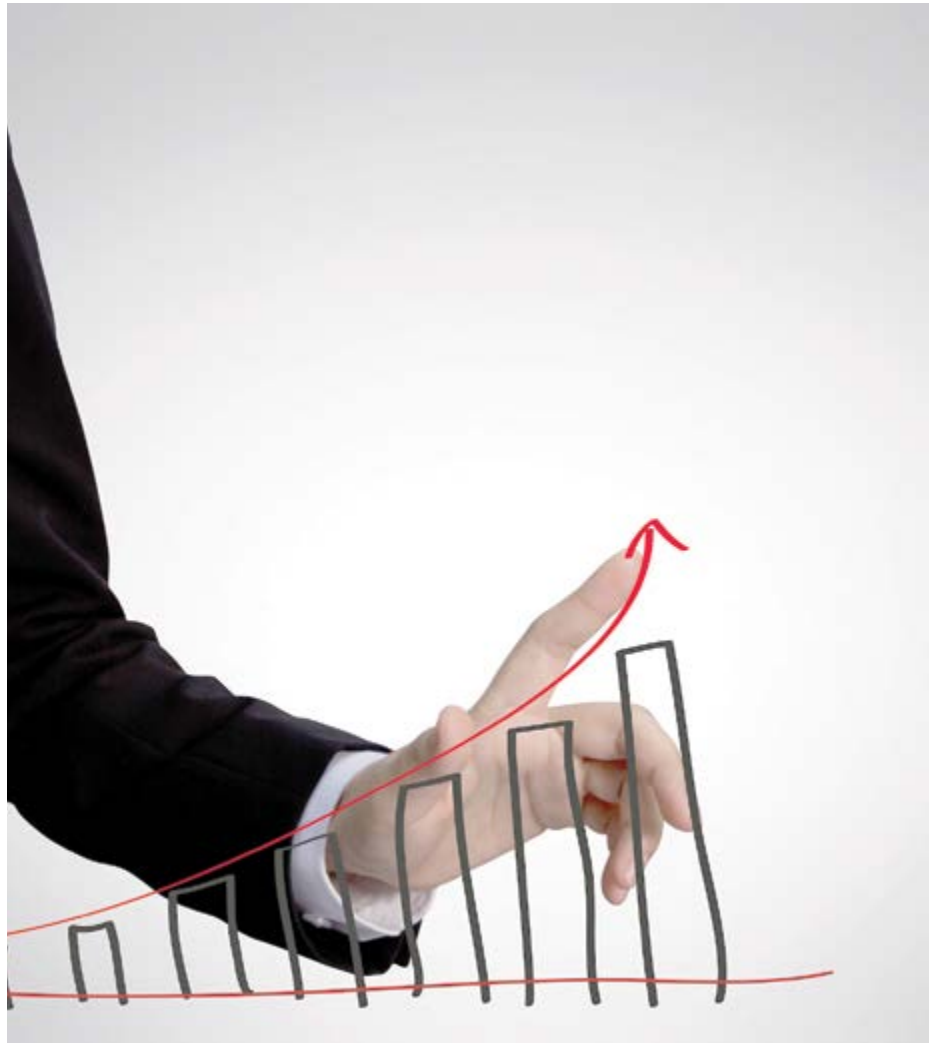
Both the level of appetite and the

pace of innovation in this realm has picked up in the recent past. Cooling is quickly moving from a nice-to-have label to a compelling proposition for any mattress. Specially for markets where temperature-control is a salient concern. In a report for 2018-2022, Technavio also noted that there has been a considerable decline in the use of heat-emitting memory foam in Europe region's market that is supposed to grow at a Compounded Annual Growth Rate (CAGR) of three percent. It highlighted that existing market players were investing in cooling gels and fabrics in latex mattresses.

After all, cool temperature is an important aspect for a good night's sleep, as shared by 79 percent users. This is quite significant when you see other reasons that came close – like 92 percent people want a comfortable mattress, and 73 percent count a dark room as an important sleep experience element (As per the Bedroom Poll by the National Sleep Foundation). At the same time, 92 percent rated comfortable mattress, 91 percent rated comfortable sheets and 85 percent rated bedding as important factors for a good sleep experience. That was the case a few years back but nothing much has changed. In the 2020 'Sleep in America' poll, the foundation noted that among those people who feel sleepy, 55 percent attribute it to 'not sleeping well enough' and 44 percent blame it on 'not having enough time'.

As per some estimates by GrandView Research (which reckoned the global mattress market at \$27.5 billion in 2018 and growing at 6.7 percent between 2019 and 2025), Innerspring occupied the largest share as a product segment in 2018. It stood at 32.5 percent and was seen driven by need for comfortable sleeping surfaces. The report also noted growth of specialty mattress such as airbed, waterbed mattresses.

Believe it or not, customers may not have been worried about what's under the hood, but now everything – environment concerns, health issues and tough weather conditions – are making them more aware and



Traditional Innerspring is forecast to grow at 4.1 per cent and reach the size of about \$31 billion while the overall mattress market worldwide will grow by \$14.4 billion at a CAGR of 5.1 per cent (ReportLinker Estimates, Post-Covid analysis 2020)

demanding of the right 'inside'. This is why a 'cooling mattress' is emerging as a segment in itself.

How do they work?

Every cooling mattress has its formula for dissipating heat. Some do away with the memory foam completely for the in-built ventilation of inner spring technology. Some use proprietary hybrids of foam and other materials. Some inject copper and titanium infusions to digress the heat away for the sleeper. Some rely on the innerspring to conduct the air flow in a natural way.

The US Memory foam mattress market has been projected to reach \$8 billion by 2023 (Research and Markets) If we look at India, Research and Markets saw that the overall mattress market grew at a CAGR of 11 per cent in the last five years, with Coir mattress dominating the space but now being overtaken by PU foam (where interestingly rigid PU has more market share than flexible PU)

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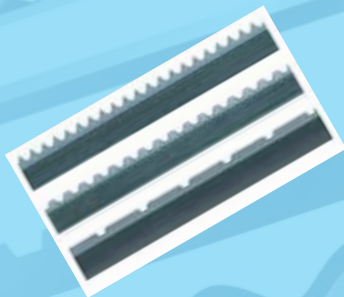
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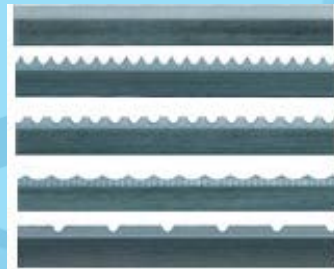


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The Indian mattress market is projected to touch Rs. 14,000 crore by 2021

Some use grids. Some employ special gels. Some use cell design and hyper-elastic construction tweaks. These means ensure that hot air does not gather on the surface. Classic memory foam has been notorious for trapping heat but its new twists with gel and other infusions are trying to break that cliché. The idea is to minimize the heat-retentive materials and accelerate ventilation and cooling through the right guidance of airflow.

This is done in some broad ways and every brand has its own design or innovation twist to these approaches:

- Convection
- Conduction
- Material type and additives put in foam
- Minerals – Charcoal, Titanium, Copper, Graphite etc.
- Silicon grids
- Open-celled foams that use air as an insulating agent
- Contour cuts and convolutions that form air channels
- Pinholes and perforations
- Pocketed coils and micro-coils
- Gel – as foam, pad, bead or swivel
- PCM or Phase Change Material that works as a clever thermostat

How to pick the right cooling mattress?

With a slew of options and brands adding to the summer clutter, it can

be overwhelming to decide on what summer mattress works best for you. Do not sleep sweaty. Just remember some key parameters that make the hunt easy for you.

- Go for the right mix of design and support along with cooling capabilities
- Pick the level of firmness that works well for your sleeping position
- Choose materials that are naturally cooling instead of too many layers and complicated structures
- The mattress should also feel dry and soft while it keeps the heat away
- Gel may suck the heat away from the user but it should not interfere with the desired sinking-level and pressure points
- The material's breathability and softness should be kept into consideration
- Have a complete sleep package for your cooling needs – pillows, sheets and blankets. Just throwing in a cooling mattress would not serve your end purpose. You will have to invest smartly in whatever else you would need – like cooling covers, cooling sheets, cooling gadgets etc.
- Investing in a mattress would not be helpful if it only cools to the touch and does not deliver on all-night cooling
- Ask the right people if the mattress is great but if it might be a high-maintenance purchase?

Parallel Developments

The global cooling fabrics market will touch \$4.35 billion by 2025 (at a CAGR of 10.3 per cent between 2019 and 2025). China and India are major markets due to increased adoption: Zion Market Research The Organic bedding market is worth \$1.1 billion by 2025. This shows an increasing demand for high-end bedding products driven by luxurious lifestyles of consumers and growing awareness of sleep health. (Grand View Research)

In a paper, Jose I Priego Quesada and the team found that PCMs mattresses resulted in a lower increase in skin temperature after one was lying on it for 20 minutes. It was seen that PCMs in mattresses improved the heat dissipation of the human body, but did not alter thermal comfort and thermal perception.

Avoid all the branding noise around 'cooling' and avail as many comparisons, trials and product explanations as you can before picking the coolest bed for your next summer season. It would be quite a prudent investment if you choose a mattress that works perfectly for your body, budget and the thermometer together.

Yes. 'Cooling mattresses' are in vogue. Not just because there are people demanding them but because now it is possible to combine posture, health and cooling in one bed. Even the kings of the yore may not have found that enviable balance in their palaces. Or maybe they did and our industry's brains still have to discover them. One thing is for sure. The temperature is only going to go up when it comes to innovation and demand – for the 'cooling mattress'. That's the first thing, after all, that you would put in your summer palace, won't you? **CT**



Mr. Nipun Gupta, Executive Director, Springfit Mattress

The secret of the bounce!

Springfit Mattress is a brand that seems to be covering all corners of the industry with fresh bounce and imagination. **Mr. Nipun Gupta, Executive Director, Springfit Mattress** shares how easy or how hard is it to achieve and maintain this momentum and industry niche as a young player

Q Tell us something about your journey so far.

I and my brother Nitin started this journey around 12 years ago - with the guidance of our father Mr. Mukesh Gupta, who has over 40 years of experience in mattress manufacturing. There have been many highlights over a period of a decade. Springfit was born in 2009. It invested and imported pocket coil making machine and the assembler the very next year. By the time 2012 arrived, we inaugurated a Specialty Foam manufacturing unit in Meerut. In 2016 we inaugurated our state-of-the-art Coimbatore factory and in 2020 we set up manufacturing in Vadodara. In 2018, we were awarded as the best supplier in the Hospitality sector by Hotelier India. We have also been awarded the 'Most Innovative Brand' by MSME, Govt. of India.

Q What were the highlights and what new tipping points are worth noting?

Springfit brought innovations the 1st time in India, introducing "Z" Box mattress in a box in 2013. It also collaborated with Bollywood's superstars like Vidya Balan & Farhan Akhtar. We signed Bipasha Basu & Karan Singh Grover as Brand Ambassadors. We launched I-Sleep mattress collection, the most premium

mattress collection made for society's bureaucrats. Recently, we introduced IO-Sleep Mattress- India's First Smart Mattress.

As far as the tipping point and brand strategy go, we are more focused on adopting innovations which I believe are, at a much faster pace than the ones happening years ago. Anticipating important innovations ahead of the competition significantly helps in increasing growth. Using AI-forecasting tools to predict the business marketing strategies is more effective than any one alone at predicting the tipping point for new opportunities and expansions.

Q How easy was it to make your mark as a relatively-new player? What went into changing the perception of spring mattresses?

Many believe that Springfit is a manufacturer of Spring Mattresses, but the fact is that Springfit specialises not just in Spring mattresses but also in foam, rebond, pocket coil and smart mattresses. We started our operations with Bonnell Mattresses and now we are leaps ahead of most of the existing brands in terms of product-development, infusing technology in a mattress and making premium mattresses.

A Spring mattress - also known as Bonnell spring mattress - plays an important part in the mattress industry. They are easy to manufacture and easy to sell as they come into an economic price point. We saw there is a huge gap in the mattress industry when it comes to premium mattresses, either there were economical options available or the crazy expensive imported mattresses around. We started experimenting on manufacturing premium mattresses and placed our product strategically in the market.

Q What has been the impetus for interventions like #Letsgivesleep?

We had this idea from one of our co-workers. One day we were casually discussing about day-to-day activity in our head office and came to know that one of our co-worker's teenager saw a beggar who was shivering in cold and had just a sheet underneath him. The teenager took a radical step and without asking her parents, dragged an extra cotton mattress from the guest room and took it outside and gave it away. Instantly, we felt so connected with the story. The #Letsgivesleep initiative was solely aimed at providing mattresses to the homeless and needy. It melts our hearts to see small kids and senior citizens on the streets without care. **CT**



Check your mattress before popping the pill

So, what is common between Amazon CEO & the wealthiest person on earth Jeff Bezos, Microsoft founder Bill Gates, Apple CEO Tim Cook, and Tibetan leader Dalai Lama. Besides the fact that they are immensely successful at what they do, there is another linkage that is common to them. They are avid sleepers and are known to sleep for at least seven hours daily.

The importance of sleep in our lives cannot be overstated.

Close to a third of our lives on this planet is spent sleeping. The reason is that our body requires sleep to function correctly. Just like we need a healthy diet and exercise for our well-being. Sleep is crucial for the functioning of the body. And yet, even though sleep is one of our basic daily needs, more than 60 percent of adults say their sleep needs are not being adequately met during the week.

Over the past couple of centuries or

so, with the advent of modernism and Industrial Revolution, human society has undergone tremendous change. The Circadian rhythm that dictated the functioning of our body has been broken. Today, people are working till late, sleeping irregularly, and so on. Researchers have found that in studies where test subjects were only allowed for four hours of sleep per night for three weeks, the impact on their health was monumental. Blood tests revealed cardiovascular stress, adverse metabolic changes, lowered immune function, and inflammatory markers.

In short, getting enough sleep is essential for helping a person maintain optimal health and well-being.

Dr Yatin Patel, Founder & Medical Director, SnoozeClinic.com, is unequivocal on his assessment when it comes to the importance of sleep. "Results of brain imaging (positron emission tomography, or PET) studies during sleep deprivation have revealed that sleep

deprivation decreases brain activation. More critical is that activation is most decreased in specific brain areas—those mediating the ability to maintain alertness and vigilance and those mediating higher-order mental operations such as situational awareness, adaptability, mental agility, judgment, initiative, anticipation, and planning. These qualities are crucial for organizational effectiveness," he states.

Sleep deprivation can cause a feeling of irritability among the subjects. "You will experience more emotional problems, including depression or anxiety. You will have reduced ability to deal with stress. You will have impaired self-assessment and regulation. You will forget important information. You will show poor judgment, poor concentration, and an inability to make decisions. Overall, intellectual performance will decrease; critical thinking will plummet. You will increase your risk of obesity, heart disease, and even diabetes," he adds.

Sleep deprivation can also have a

detrimental impact on the immune system. At the University of Chicago, sleep researcher Eve van Cauter gave flu vaccine to subjects who had slept only four hours per night for the previous six nights. Their immune systems produced only half the normal number of antibodies in response. Their heart rates and blood pressure were elevated. They developed insulin resistance, and the secretion of leptin, a hormone that inhibits appetite, was reduced, making the individual more apt to gain weight.

“Most leaders approach sleep with a take-it-or-leave-it attitude, but sleep is not optional. The human body requires sleep in order to survive and operate at maximum efficiency. While the amount of sleep one requires varies somewhat from individual to individual, the average person requires between seven and eight hours of quality sleep each day. It is a statistical reality that death from all causes is lowest among adults who get the required number of sleep hours per night. The death rate is significantly higher among those who sleep less than seven hours.”

Sleep disorders are conditions that result in changes in the way that one sleeps. A sleep disorder can affect your overall health, safety and quality of life. Sleep deprivation can affect your ability to drive safely and increase your risk of other health problems.

Dr. Basant Kamwal, Consultant Physician and Critical Care, HCG Hospital, makes a distinction about the types of sleeping ailments.

“Sleep insufficiency is a term doctors use when a person doesn't get enough sleep. Sleep insufficiency is different from insomnia, which is when a person has trouble falling or staying asleep. In both cases, the person might sleep less than they should and have trouble staying alert during the day. But in general, people with sleep insufficiency would be able to sleep if they had the chance. Usually, there are things outside their control, keeping them from getting restful sleep,” he stated.

While the importance of sleep is well known, and the impact of the lack of it too, yet sleep is still a little bit of mystery.

Over the past four decades, sleep disorders have garnered much attention both from the layman and the medical fraternity. Approximately 80 types of sleep disorders have been classified.

Because of the deep connection sleep has with the functioning of the brain, and given the fact that mind is immensely complex, there is still a grey area in the field of sleep research, namely why we sleep.

The research in the sphere of sleep has been fairly recent. It started in earnest in the 1920s, when a couple of books were published talking about the wakefulness and circadian rhythms. Henri Pieron, in his book, *Le probleme physiologique du sommeil*, drew connections between sleep and psychological studies. In many ways, his book is seen as the beginning of the modern sleep discovery movement. By the 1950s, Dr Nathaniel Kleitman and his student, Dr Eugene Aserinsky, had made the astonishing discovery of rapid eye movement (REM) during sleep.

In the 1970s, the Stanford University Sleep Research Center came into being, built upon Aserinsky's work on REM sleep by describing the “cyclical” nature of sleep in 1955.

Over the past four decades, sleep disorders have garnered much attention both from the layman and the medical fraternity. Approximately 80 types of sleep disorders have been classified. But then sleep disorders are not merely a health issue; they are big business as well, especially when it comes to sleeping aids like over the counter (OTC) sleeping pills.


According to GlobalData, the global sleeping disorders market is worth

over \$1.5bn and is expected to reach over \$1.7bn by 2023. Despite this growth, primary research conducted by GlobalData shows that the sleep disorders market needs drugs with better safety profiles and fewer side effects.

Yet, there have been numerous concerns raised about the detrimental impact of sleeping aids on the health of the individual. The biggest issue is that it is very addictive, and people tend to form a habit of the same. Is there an alternative to sleeping aids?

According to Dr Patel, the alternative is indeed there. *“Insomnia is a symptom, not a diagnosis. We need to first find out the cause of the insomnia and treat that cause. Is it undiagnosed depression? Poor sleep habits? Stress? Overwork? Sedentary life? Or is it obstructive sleep apnea, a disease in which a person's throat repeatedly shuts off during sleep. A cool, quiet, dark, comfortable bedroom is necessary for a refreshing sleep. The mattress' firmness must be individualized for each individual. In our sleep laboratory, we use Sleep Number bed where the hardness can be adjusted based on the person's preference. The newer models of the Sleep Number beds now also include temperature adjustment, which allows both bed partners to adjust firmness and temperature to the individual preference,”* he states.

Indeed, before latching on to sleeping aids, it always makes sense to make subtle changes in our lifestyle and habits. Right from avoiding caffeine, cigarette, and alcohol to undertaking exercise, there are plenty of things that can be done for inducing sleep. One aspect that is often overlooked is the condition of the mattress. A mattress plays a significant role in the sleep quality of the individual. Hence it should be the first thing to look into once; there is a problem with sleeping.

“We should make a concerted effort to realign our circadian clocks, follow a pattern or a rhythm, rather than depending on external aids for sleeping. We should begin a process of reform. This will go much longer,” said Dr Kamwal. 



Sleeping for comfort, sleeping for life

There's precious little we can do about sleep. It is an involuntary function; we can't force our bodies to have a good sleep. While there is a list of things that could enable good sleep, there's no guarantee to it

There's an Irish adage that states that "a good laugh and long sleep are the two best cures for anything." While laughing is something we can voluntarily work upon, namely, indulge in humour or humorous activities, there's precious little we can do about sleep. It is an involuntary function; we can't force our bodies to have a good sleep. While there is a list of things that could enable good sleep, there's no guarantee to it.

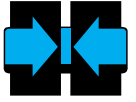
Little wonder, people across the globe are floundering in the dark when it comes to sleep.

So, what could enable a good sleep? If experts are to be believed, the answer lies within the bedsheets. A right mattress can go a very long way

in allowing a night of good sleep. Have you noticed how comfortable sleep is in a deluxe hotel room? The secret lies in the mattress that lays hidden under the white-sheets. Good hotels are known to invest heavily in good mattresses, to ensure that the guests have a peaceful and refreshing sleep.

Sadly, investing in a mattress is the last thing in our minds when it comes to designing a home. We'd readily spend lakhs in redoing the walls, or cupboards and so on. But not pay attention to a thing that we spend one-third of our life on. People would not bother researching on the topic, on which mattress to buy, etc. even though it is so straight-forward and simple.

The good news is that people are



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now waking up to the idea of investing time and money in a mattress and putting their time and effort into the subject.

Vaibhav Mhasilkar, Interior Designer at Shree Sidhakala Design, is witnessing this shift first-hand. People are actively looking at ways and means to make life comfortable, and the mattress is popping up more and more into the conversations.

"To be honest. Choosing the appropriate mattress is a difficult task, especially so in India, where cost is the uppermost concern. But yet, over the years, people are waking up to the benefits of getting a good mattress. As a designer, when I suggest an innovative solution, customers are ready to listen out and try. That is a welcome shift," he states.

One of the most common demands is to find "hotel-like" bedding.

"People want their bedrooms to be as elegant and pristine as five-star hotels. Within that wish, the bed often tops the list. So many of my clients have asked for their beds to feel like those soft cushy hotel beds. That is usually the starting point for any discussion."

Driving the demand

Corporate life can be pretty demanding. Hours after hours spent hunched over a desk. Chairs that provide little lumbar support, irregular eating patterns, lack of exercise, and so on. All these factors have an impact on health. The persistent backaches, the numbness in the body, etc. are the signs that all is not well.

In this scenario, good comfortable sleep is not a luxury, but more of a necessity. This is why people are paying attention to bedrooms like never before.

Jigna Saija, Architect & Interior Designer, Design Lines, is well attuned with this requirement. "Designing the bedroom is now almost at par with designing the living room. Earlier, bedroom design would be all about installing a Queen's or a King's bed in the centre of the room and encasing it with

Six things to consider before buying a Mattress

ROOM DESIGN: One of the overlooked aspects of buying a mattress is whether it will blend in the aesthetic. Thus, it is important to choose a mattress based on interior design; for instance, the size of the bed will be dictated by the overall size of the room.

FIRMNESS: To be fair, the choice of firmness is often a subjective aspect. Some prefer their beds to be firm with strong feedback, while others want it to be soft and receptive. More often than not, the firmness preference is based on two aspects, namely, the contours of the individual and the sleeping position. Typically, people on the heavy side prefer a firm mattress, while those on the leaner prefer a soft one. But then, it is subjective.

BRAND: Buying a mattress is an investment in health. Hence one should be sure of the quality of the product. While there are plenty of choices available in the marketplace, it is always advisable to invest money in a renowned brand. The reason for this simple, the cost of the mattress is light on the pocket, so when you

are spending as much, it is best to have the best company to deliver it. A branded company will be conscious of its reputation and would not cut corners while crafting its product.

SIZE: Nearly, every mattress available today can be slotted in one of the six standard sizes. Namely; Twin, Twin XL, Full/Double, Queen, and King. There are some customisations in terms of additional options like Full XL or Short Queen. Additionally, you can even have a hybrid bed, which includes two separate mattresses that can be pushed together or separated.

MATERIAL: It is vital for you as a buyer to know what you are investing in. Considering the full range of available choices, from memory foam to latex, it makes excellent sense to understand and evaluate the options in greater detail.

WARRANTY: One of the most critical buying factors is the warranty period. A right mattress will have a minimum of an 8-year full replacement or non-prorated warranty. Find a mattress that provides you with a decent warranty program.



Photo Courtesy Pexels, Andrea

other furniture. But now that ethos has changed. It is now about convenience and comfort," she states.

One of the other exciting trends is to reimagine the very nature of the bedroom as we know it. For instance, the centerpiece of the bedroom is the bed right? Now what if there was no bed in the room, say a mattress that is aesthetically placed on the floor. Saija talks about such trends while discussing the latest in decor. "A lot of our customers are demanding a vintage or retro theme to their bedroom, in such cases, we create a small platform with a comfy cushion, rather than crafting a full-fledged bed," she adds.



Of course, while the bed on the floor looks supremely elegant. It needs to be set with beautiful bedding and layers of different hues and textures. Numerous pillows could also add to the charm of the bed. Mattress is no longer a utility product but it can be a part of the overall design theme. Before going out and buying a mattress here are a few pointers that are worth paying attention to:

- Don't forget the aesthetics. Before investing in a bed, decide on the other aspects, like wall colour, furnishings, etc.
- While typically, the mattress is hidden underneath the bedding, they too come in varied colours and contours, opt for one that is suitable.
- The size of the cot (and the mattress) is dependent on the shape and size of the individual and how many people are going to sleep on it.
- Accessories add the perfect finishing touch to bedroom designs. For example, soft furnishings add comfort, style and colour, whereas beautiful cashmere throws are luxurious and warm.

According to Saija, it is the corporate couples that are the most demanding customers when it comes to luxury and comfort. They are not overtly price-sensitive and are willing to spend a little more if they see value in the investment.

Buying the perfect match

Anyone who has purchased a bed would

Choosing the Type of Mattress

MEMORY FOAM: Made from polyfoam, Memory foam is renowned for the support it offers to the shoulder and hips.

GEL: Do you like your bed to be cool and welcoming, gel mattresses can be that. With smart gel on top of a foam mattress, it will be colder than all the other mattress.

INNERSPRING: Steel coils support a comfort layer of polyfoam. Side, back and people who sleep on the stomach are usually better placed on an innerspring mattress.

LATEX: Instead of foam, how about a fat layer of latex. Latex offers varying levels of firmness and plushness to accommodate different types of sleepers.

WATER: Do you like the wavy feeling, that rocking in the boat types, then water beds are for you. Immensely popular couple of decades ago, the mattresses seemed to have lost some charm these days.

BONDED: Do you like a firm sleeping surface, well, how about a hard mattress made of polyfoam? This one is as hard as it gets.

know that buying the right mattress is not an easy thing. Hours would need to be spent from visiting one retailer to another. On top of it, there are so many varieties and types that it can be pretty daunting. Yet, unlike buying the product online, customers still prefer the old touch and feel sort of retail experience. It can be pretty cumbersome.

The good thing is that the digital presence of most manufacturers is growing by a steady ratio. Not only selling mattresses, but companies are also encouraging the uptake by interesting marketing ploys like seamless returns, assured gifts, and so on.

"In addition to retail, there are new channels that engage the customer. Digital portals and social media sites are

high on the engagement aspect. They help in spreading awareness about the product category," says Mhasilkar.

In the end, the eight or so hours that you spend on the bed every night might just be the most crucial hours in your day. A comfortable night's sleep will rekindle your spirit and leave you refreshed and raring to go. In that manner, your bedroom is an extension to yourself and should reflect your personal tastes and design intricacies.

A comfortable and cushy mattress can add lustre to your bedroom and make your sleep more satisfied and cosy. Choose wisely from the plethora of available choices. And start leading a new life. As the Dalai Lama has said, "Sleep is the best meditation". **CT**



Positioning play for the mattress industry

Philip Kotler, known as the father of modern marketing, had created the famous quartet of 4Ps that has for long been considered the stepping stone for business success. The 4Ps stood for Product, Packaging, Price & Positioning. Of the 4Ps, positioning merited a special place. Kotler defined it as “the act of designing the company’s offering and image to occupy a distinctive place in the mind of the target market.” Thus, positioning was the manner in which a company’s product or services was differentiated from its competitors, even if the difference was in the customer’s mind.

To give an instance, Limca is a carbonated drink that has been marketed as refreshing lemonade that

is also “zero bacteria”. Now, the fact is that every carbonated beverage in the market is essentially “zero bacteria,” but by constantly harping over the point, Limca was able to position itself as a healthier option, when it was no different from others.

Similarly, a brand positioning strategy creates and nurtures brand associations in a customer’s mind, through constant messaging, to make them perceive a brand in a particular manner. A good brand positioning strategy can go a long way in establishing a brand as a success or a failure.

Yet, brand positioning can be complicated, and there are different manners to achieve it. To begin with, two main objectives need to be met:

Create a distinct brand identity (in relation to competition)

A brand’s actual position in the customer’s mind

A brand can be successful, only when these two objectives coincide.

Positioning is a journey

Harish Bijoor, Owner, Harish Bijoor Consults Inc. emphasises the dynamic nature of positioning, “Brand positioning is a dynamic concept. The important point to remember is that there is nothing called static brand positioning anymore. The market is completely digital and dynamic. In such an environment, the very basic of positioning theory is being questioned. Brand positioning is a concept that aims to position the brand in the minds of



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consumers. Anyone that attempts this must first know the minds of people. To that extent, it is a very qualitative research-driven concept. Once having understood the mind of consumers for the moment, one needs to establish the positioning concept. The keyword is dynamism."

The mattress industry in India is in urgent need of this dynamism. The industry is as of now differentiated in two distinct sectors; the organised and the unorganised. In the organised sector, we have branded players like Sleepwell, Kurlon, Duroflex, Nilkamal, Godrej Interio, and so on. Meanwhile, there is a significant market share of the unorganised sector as well. According to Euromonitor portal, the unorganised sector accounts for almost 40 percent of the mattress marketplace. The total market for mattresses in India was around 18.6 million units, with an estimated new demand for mattresses being close to 7 million units per year.

So how can the mattress brand stand out in the clutter? How can the branded companies combat the large unorganised sector?

Well, in the words of Michael E Porter of Harvard Business School, there are three types of positioning strategy:

- Cost leader
- Product differentiation
- Niche brand

According to Porter, to be successful firms must be superior in at least one of these positions and cannot be average - or dominant - in all three areas.

Steps to crafting positioning strategy

So, now that we know, how can brands apply brand positioning?

Sudish Balan, Chief Business Officer, Tonic Worldwide, has a rather innovative take. "Before we climb the steps to position, we need to define a brand strategy. Brand, while it seems like a concept, it needs to be treated like a person. A brand has its personality and nuances. Advertising & marketing are like clothes on that person. Hence, the primary point to start is to define what

Product, Packaging, Price & Positioning are the four pillars of the modern business. Any business needs to position itself in a manner in which a company's product or services are differentiated from its competitors

the brand is and what it stands for, is essential."

Once the identity has been defined clearly, here are the steps that can be followed to create a winning brand strategy.

1. Differentiating between brand strategy and brand positioning:

Brand positioning is a subset of brand strategy, which is all about defining the target audience, understanding their needs, communicating through the right channels. Whereas positioning is a creative extension to that strategy. It is an insightful manner in which messaging is shared with the consumer. Thus, brand strategy and positioning are not interchangeable but rather complementary to each other.

2. Determine your current brand positioning:

To create an effective brand positioning strategy, it is essential to evaluate, where you stand at the moment. How does the customer perceive you? What is the USP that the customer likes? It is like doing a SWOT analysis from a customer's point of view. Once you have plotted the positions, you will get additional insights on what the consumer is demanding these days and how they are reacting.

3. Construct a positioning map: Once you have analysed the strengths and weaknesses, it is time to broaden

the exercise and include competition. One of the best ways to do would be to create a positioning map, which entails segmentation. The plan could be divided into a quadrant, where the competitive brands would be plotted based on their messaging.

4. Communicate effectively: Now that the groundwork has been done, it is time to lay the tracks. Based on analysis and assessment, it is now time to create effective communication, be it text, multimedia or video. Aligned with the positioning strategy, this would be the stage where customer engagement is the maximum.

5. Evaluate and Calibrate: Hitting the bull's eye in the first attempt is a rarity. Remember, positioning is not a checklist but an ever-evolving process. Hence, a constant evaluation of the communication can help tweak and calibrate the positioning for higher impact.

The role of positioning cannot be overstated in the context of the Indian mattress industry. A market that is dominated by the unorganised sector that is synonymous with low cost, lower quality. In these times, it becomes all the more difficult for companies to convince the customer to shell out more. This is where positioning can play a significant role.

Looking at the broader picture

Brand expert Bijoor alludes to the same when he states that, "The organised sector needs to invest in the science of sleep. Sleep is an industry in itself. The importance of sleep is being recognised gradually in a sleep-deprived economy. Those that position themselves in the sleep industry as specialists will do well. A mattress is a sleep accoutrement. The science of sleep embedded in a mattress is a positioning stance in itself of value."

This was what Godrej Interio had done last year in the form of a campaign: Sleep@10. The crux of the campaign was to educate the user on the importance of sleep and how deprivation can lead to unintended consequences. As part of

the campaign, Godrej launched a mobile App, Sleep-o-meter, which encouraged users to share their sleep data. Over a period, close to 3.5 lakh Indians have taken sleep test using the Sleep-o-Meter to assess if they clock adequate hours of sleep or not, and adopt a healthy lifestyle. Also, the initiative resulted in 300+ articles across leading publications like *indiatimes.com*, *The Hindu*, *Times of India*, *Bangalore Mirror*, *Deccan Herald*, *Pune Mirror*, and many more. The company also benefitted from this positive social campaign, Godrej Interio mattress awareness increased by 100 percent (From 18 percent to 36 percent).

Balan from Tonic Media talks about the need to adapt message based on medium and audience, especially in the digital context. "Digital is now a crucial medium. With multiplicity of platforms, messaging needs to be customised based on the medium and the audience. For instance, a video posted on YouTube channel would be much different from a one posted on Instagram or Facebook. Customisation of the messaging is the key," he adds.

Going digital can be a great way to reach out to audiences and expand the business horizon. Over the years, the reach of the Internet has spread far and wide in India, and everyone is connected to the World Wide Web through their smart-phones. Thanks to communication apps like WhatsApp and Facebook, the reach has only widened. A great instance of how the Internet could be leveraged to build a brand can be seen from the campaign of Purple Mattress, a bedding company in the US.

Purple is partnering with a range of influencers that can help it reach people who run their home, thus moving its brand in the mindset of the users. The company has created a YouTube channel, wherein it posts its humorous videos built around the topic of the mattress. The channel is a roaring success; it has some 1.78 lakh subscribers. And its most popular video, "How to Use a Raw Egg to Determine if Your Mattress is Awful" has garnered 185 Million views. Purple Mattress has been on the digital

The importance of sleep is being recognised gradually in a sleep-deprived economy. Those that position themselves in the sleep industry as specialists will do well. Brand positioning strategy creates and nurtures brand

space of around three years, and it has generated over 1.5 billion views of its comedic video ads in three years. The company has partnered with influencers in interior design, the bridal space, and busy moms who create popular digital content – and employed a distinct tone compared with the videos that initially built its brand.

The Indian Sleep Product Federation too has embraced the digital medium. It has its digital portal, <https://ispf.co.in/> through which it connects to the community. ISPF now also has a social media presence on Facebook, where it spreads awareness about mattress related issues.

Humour sells

Light-hearted banter or humour can be an excellent tool for positioning. Take the case of the Sealy Mattress Film - 'Nino' (Mexico). The film very humorously depicts a kid, who seems to be enjoying himself on a bed by jumping continuously. But when the kid jumps on a bed with Sealy mattress, he immediately falls asleep. This commercial was very popular and even became a viral couple of years ago.

Another great instance of using humour effectively comes from Spain. Back in 2013, Spain was undergoing a financial meltdown. The financial sector was in turmoil, with the banks being bailed out by the European Union. During all the upheaval, Des's, a Spanish mattress manufacturer, launched a


new product in a challenging market. Economic difficulties meant that Spanish consumers were reluctant to make non-essential purchases. Understanding that people were worried about finances and not sleeping well at night, the company launched a new mattress which included a built-in safe.

Marketing communications emphasised the product's ability to deliver a good night's sleep through comfort and the removal of worry. The campaign used video, ads, and converted retail stores to look like banks. The marketing ploy was successful, and the campaign was covered throughout the media for its empathic sympathy.

"To get the positioning right, brands need to invest in their marketing efforts continuously. There needs to be an empirical approach to brand positioning. The brand needs to keep its focus all the different aspects related to the product, from placement to packaging. Sadly, Indian companies don't pay much attention to these finer aspects, and hence lose out on an opportunity to build a robust brand," adds Balan.

To underscore the success of packaging, take the case of the UK-based mattress company Eve sleep. The company wished to create an award-winning calling card, a cult brand with an aspirational and desirable product range, and a design, striking and stylish enough to be worth talking about.

The mattress category was typically about getting a lovely, cosy night's sleep. The brand broke category rules with a core palette of bright sunshine colours, crisp, simple graphics, playful copy, redesigned packaging and content that is all about being wide awake, in addition to a new name, Eve, to cover all the events that are worth waking up for. Eve sold 63,000 mattresses in 2 years with an average monthly sales growth rate of 25 percent in year two.

In the end, when it comes to positioning, the devil often lies in the detail. An excellent positioning pitch can immensely help a brand to build its market share and become a leader. 

ISPF supported India Mattresstech and Upholstery Supplies Expo in Bangalore



*Mr. Remy Tack, CEO, Global Textile Alliance USA
Director, Global Textile Alliance India at ISPF Stall, IMT 2020,
Bangalore.*



*Mr. Ankit Garg, Co-founder and CEO, Wakefit Innovations Pvt Ltd,
at ISPF Stall, IMT 2020, Bangalore.*

The show had big presence with over seven thousand visitors and 130+ exhibits from various countries like Germany, Turkey, Sri Lanka and China.

India Mattresstech and Upholstery Supplies Expo was held in Bangalore with new pavilions featuring mattress and upholstery production technology, machinery & supplies at Bangalore International Exhibition Center (BIEC) in February this year.

In its 5th edition, the show featured 5,000+ sqm. of space, played host over 7,000 visitors, 130+ exhibitors with international representation from Turkey, Germany, Sri Lanka and China. The exhibition focussed on mattress production machinery and supplies, mattress finishing machinery and supplies, production tools and equipment, upholstery production technology, machinery and supplies, bed systems, new materials, trade associations, business services and media.

The 4-day show attracted buyers from across India, the neighbouring countries (Nepal, Sri Lanka, Bangladesh & Bhutan), Middle-East, Africa and the South East Asian countries. The event was well appreciated.

The expo was organized by NuernbergMesse India Pvt Ltd., in co-operation with Unitech Expo and supported by Indian Sleep Products Federation (ISPF).



ISPF Stall, Mattresstech Expo 2020, Bangalore.

Some trivia to sleep over

The sleeping mattress has some interesting history. While we hear of phrases such as bed of roses and bed of nails, the mattress is where every tired soul would retire to after a hectic day either hunting, escaping the mammoth or striking a boardroom deal. We bring you a compilation of trivia from around web, related to bed. These tell the story of beds and mattress from ancient days to modern ones.

1. Though the Egyptian Pharaohs used a raised pallet as bed, the Romans built the first luxury beds. The early luxury bed – usually stuffed with reeds, hay, wool, or feathers, and covered in luxurious fabrics. Romans are also credited with creating the first waterbed. The sleeper would recline in a cradle of warm water until drowsy, then be lifted onto an adjacent cradle with a mattress, where they would be rocked to sleep.

2. In 2011, archaeologists discovered a bed dating back 77,000 years ago in South Africa. When archeologists looked under a microscope at the 77,000 year old remains they found cape laurel tree leaves (*Cryptocarya woodii*). This was probably chosen because it had a better chance at protecting early humans from mosquitoes and other pests as it has several chemical compounds in it that can kill insects.

3. “The beds in India are very light,” wrote the Moroccan traveller and scholar Ibn Battuta in 1350. “A single man can carry one and every traveller should have his own bed, which his slave carries about on his head. The bed consists of four conical legs, on which four staves are laid; between they plait a sort of ribbon of silk or cotton. When you lie on it you need nothing else to render the bed sufficiently elastic.”

4. Mattresses used to rest on ropes in the 18th century. That’s where the saying “Sleep tight, don’t let the bed bugs bite” came from. People would have to tighten the ropes every so often so that the mattress wouldn’t sag. In 17th Century England beds were made with wood frames, rope or leather supports, and bags of straw as mattresses.



5. Folding beds were first invented by the Ancient Greeks. There are actually pottery remains from that time depicting folding beds. However, Beds that fold up into a wall are sometimes called Murphy beds after their inventor William Lawrence Murphy. He invented this in the year 1900 and patented the idea in 1908. Murphy is said to have invented his singular bed design to help woo a woman in his one room apartment without inviting social stigma.

6. The word mattress derives from the Arabic matrah which means "something thrown down" or "place where something is thrown down" and hence "mat, cushion". During the Crusades Europeans adopted the Arabic method of sleeping on cushions on the floor, and the word materas eventually descended into Middle English through the Romance languages. The oldest known mattress dates to around 77,000 years ago.



Photo by: Hans Ollermann

7. Mattresses can also be made from bladders of some fluid, notably water or air. These date to antiquity – goatskin bladders filled with water were used in Persia at least as early as 3600 BCE – and gained increased popularity in the 20th century with improved manufacturing.

8. The Charpoy is the traditional sleeping surface in the Indian Sub-continent. Like many other furniture styles originating in Indian antiquity, the region and date of origin for this type of bed is not fully known. What is believed is that while it is undoubtedly ancient, the Charpoy is likely not the first daybed, as daybeds were known to be popular in ancient Mesopotamian and Greek cultures as well as in Egypt as far back as the 1st Dynasty (3100-2907 BC). While it is possible, though not provable, that the design of such beds may have entered India with Alexander in the 4th century BC, it is just as likely that the design evolved in the region on its own.



Photo by: R-E-AL (talk | contribs | Gallery) (German Wikipedia)

9. While the concept of a waterbed has been around since ancient times, it was revived in Scotland in the 19th century by Neil Arnott. As a doctor, Arnott believed the waterbed mattress could help prevent invalid patients from developing pressure sores and ulcers. Arnott deliberately never patented his idea so that doctors around the country and the world could use the waterbed mattress design to help their patients. However, only a few were ever made or used. The modern waterbed only came to market in 1971, and hit its peak popularity in 1987.

10. A Messy Bed May Be Healthier

You'r mom always told you that you better make your bed, and a tidy mattress does indeed make a room look better – however one Kingston University study found that an unmade bed might be a little healthier.

The idea is that when you make your bed and cover the mattress with the comforter, sweat and moisture is trapped within creating the ideal environment for dust mites. Leaving sheets exposed to the air and sunlight dries out the environment which can help kill off mites.



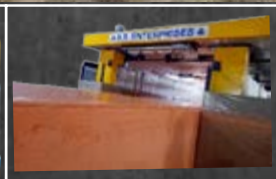
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