



ORGANIC SECTOR REPORT

HOMWARE <SLEEP> 2021

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WELCOME

CRAIG BROADBENT
ORGANIC SEARCH DIRECTOR



From FTSE 250 organisations to independents, we've helped brands to climb for over 22 years. Our agility, experience and ability to look at the bigger picture has bred an approach that is tried and trusted by some of the UK's most loved brands, including NatWest, Halfords and LloydsPharmacy.

We exist to push the boundaries of search, and this spirit remains fundamental to our approach. We love helping brands realise their own personal ambitions, and regularly carry out industry research (like this report) to help brands digest and harness the overwhelming amount of data available to us. I hope this report helps to steer your own strategy.

Anyway, enough from me! Let's get into it...

TO SPEAK TO CRAIG: CAB@FUSIONUNLIMITED.CO.UK

WHAT YOU'LL DISCOVER

This report has been prepared by the technical SEO team at Fusion Unlimited, an award-winning performance marketing agency based in Leeds. Inside, you'll get a snapshot of your true competitors and discover which brands have the greater share of voice for key product groups in the sleep sector. You'll also gain an understanding of how the volume of the most relevant keyword in your sector has changed over the past year.

THE SOURCE OF LEARNINGS

The core data set used in this report has been generated through our very own share-of-voice software, Natural Edge™, born right here at Fusion HQ, which you can read more about on page 29. This data is truly unique!

IS THIS REPORT FOR ME?

If you're a manufacturer or retailer in the sleep industry and want to remain competitive, this is worth five minutes of your time, even simply to reassure yourself you're on the right track. What have you got to lose?

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THE MARKET AT A GLANCE



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8.1%

YOY OVERALL SEARCH
GROWTH FOR DOUBLE BEDS

7.9%

YOY OVERALL SEARCH
GROWTH FOR DOUBLE MATTRESS

* Google Trends Report 2021, based on H1 2021 vs. H1 2020.



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BRAND TABLE

TOP 20: OVERALL SHARE OF ORGANIC VOICE

Here are the Top 20 performing brands in the bed sector. This has been calculated by aggregating overall share of voice (SOV) for **1,000+** of the most relevant and highest volume keywords in the industry.

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1	ARGOS	16.1%	11	EBAY	1.4%
2	DREAMS	12.6%	-	MY BED FRAMES	1.4%
3	IKEA	10.4%	12	HAPPY BEDS	1.3%
4	DUNELM	10.2%	13	FRENCH BEDROOM COMPANY	1.2%
5	AMAZON	5.7%	14	TIME 4 SLEEP	1.1%
6	BENSONS FOR BEDS	3.2%	15	MATTRESSMAN	1.0%
7	WAYFAIR	3.1%	-	HABITAT	1.0%
8	MADE	2.7%	16	FURNITURE VILLAGE	0.9%
9	MATTRESS ONLINE	1.8%	-	THE RANGE	0.9%
10	DFS	1.7%	17	BEDSTAR	0.8%

Top 50 also including Sofology, Next, Eve Sleep, Casper, John Lewis and Get Laid

KEYWORD CATEGORIES

Using our proprietary software, Natural Edge, we've delved into the biggest keyword categories in the sleep sector to discover the overall winning brands for each key product group, as well as group winners for sleep in their own right. We've aggregated the SOV from hundreds of relevant category keywords to give a thorough and true reflection. Over the next few pages, we've listed the top performers in each group.

DOUBLE BED

SINGLE BED

DOUBLE MATTRESS

SINGLE MATTRESS

SOFA BED

OTTOMAN

KING MATTRESS

MEMORY FOAM

KING BED

DIVAN



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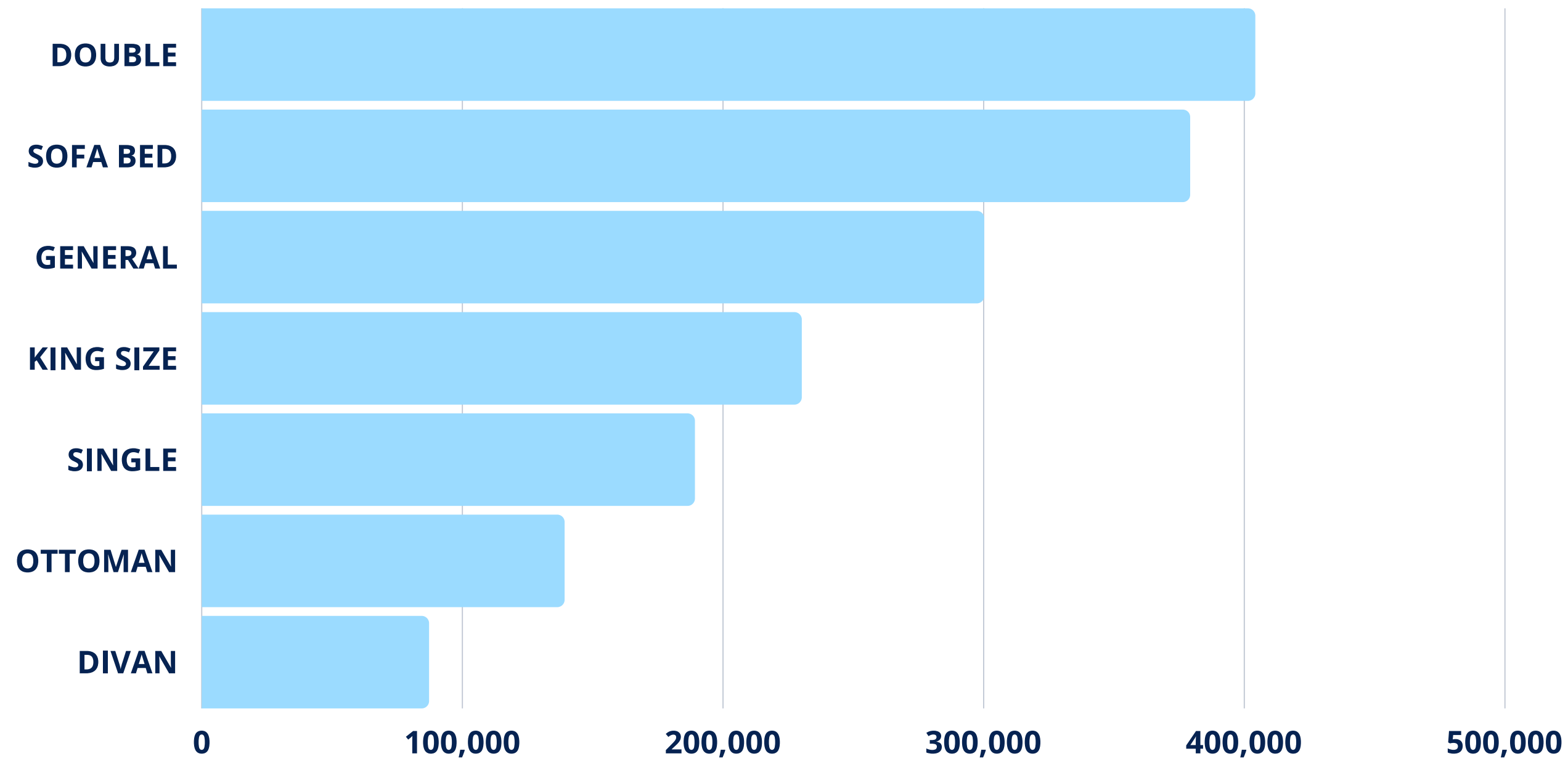
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BEDS CATEGORY MARKET SIZE

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TOTAL SEARCH VOLUME



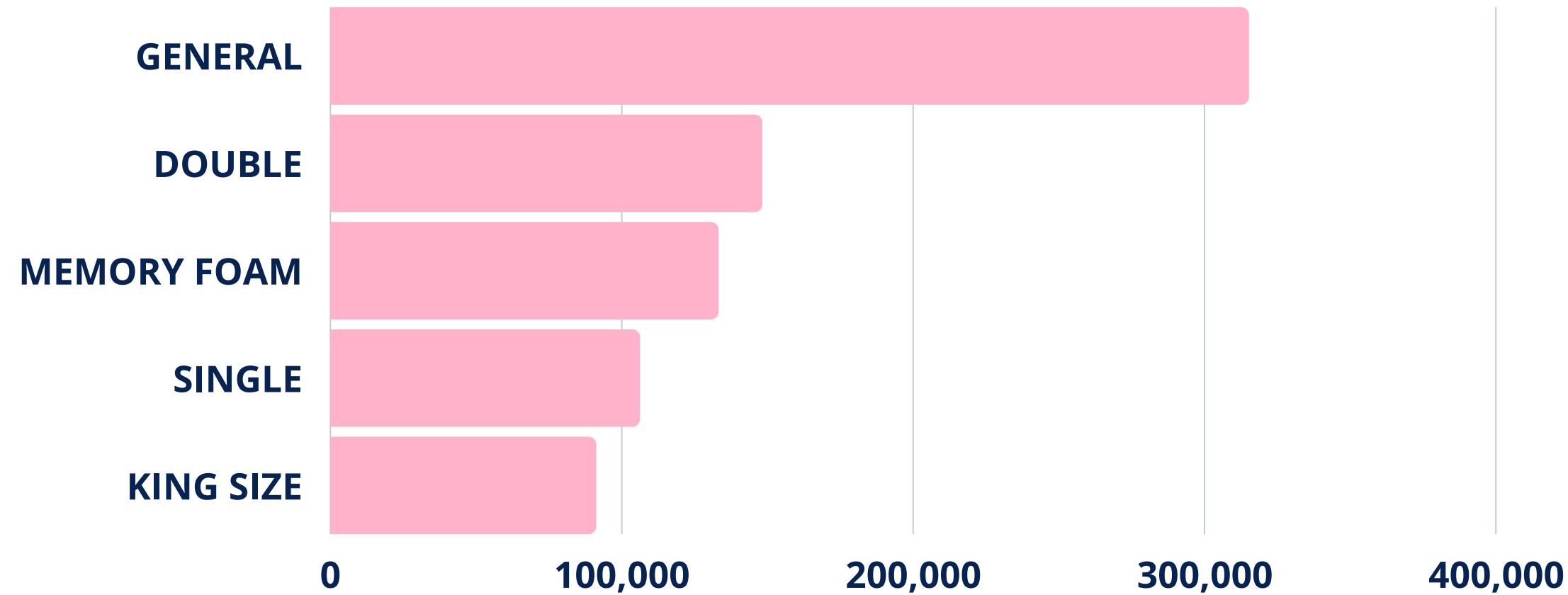
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MATTRESS CATEGORY MARKET SIZE

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TOTAL SEARCH VOLUME



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BEDS

◀ PRODUCT CATEGORIES ▶



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ALL BEDS

AT THE HEAD OF THE BED

Kicking off the leaderboard for generic 'bed' terms sees overall brand leader, Argos, in pole position with 15.2% of market share.

With only three leading retailers achieving double figures of % share there is plenty of opportunity for competing brands to steal market share.

1	ARGOS	15.2%
2	IKEA	11.0%
3	DREAMS	10.9%
4	DUNELM	10.5%
5	AMAZON	4.7%
6	WAYFAIR	3.6%
7	BENSONS FOR BEDS	3.5%
8	MADE	2.6%
9	MY BED FRAMES	2.2%
10	FRENCH BEDROOM COMPANY	2.1%
11	DFS	1.7%
12	HAPPY BEDS	1.7%
13	TIME 4 SLEEP	1.5%
-	BEDSTAR	1.5%
14	FURNITURE VILLAGE	1.2%

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DOUBLE BED

DOUBLE UP

A continued win for leading retailer, Argos, with 21% SOV (Share of Voice) for all keywords relating to 'Double Bed' - an important category which has the largest search volume opportunity of all bed and mattress related keywords with only 400,000 MSV.

1	ARGOS	21.0%
2	DUNELM	13.8%
3	DREAMS	12.2%
4	IKEA	8.8%
5	AMAZON	5.1%
6	BENSONS FOR BEDS	3.6%
7	MY BED FRAMES	3.1%
8	FRENCH BEDROOM COMPANY	2.2%
-	HABITAT	2.2%
9	MATTRESSMAN	1.8%
10	BEDSTAR	1.7%
-	WAYFAIR	1.7%
11	MADE	1.5%
12	TIME 4 SLEEP	1.4%
-	HAPPY BEDS	1.4%

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SOFA BED

PLAYER CHANGE

For this hybrid category we see the emergence of Scandi-giant, IKEA, taking first position in SOV with 25%.

SOFA SO GOOD

This category also sees the arrival of sofa retailers DFS, Sofology and M Sofas

1	IKEA	25.0%
2	ARGOS	16.6%
3	DFS	11.4%
4	MADE	7.5%
5	WAYFAIR	5.8%
6	SOFOLOGY	5.7%
7	AMAZON	4.4%
8	HABITAT	3.9%
9	DUNELM	3.8%
10	THE RANGE	2.2%
11	EBAY	1.9%
12	FURNITURE VILLAGE	1.5%
13	DREAMS	1.2%
14	FUTON COMPANY	1.0%
15	MSOFAS	0.4%

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GENERAL BEDS

WHAT DREAMS ARE MADE OF

Dreams' 12.7% SOV gap ahead of Bensons for Beds is the greatest winning lead we see in any category.

THREE IN A BED

Whilst most categories see a more segmented split in SOV at the top, the General Beds category also has a three way tie in third position with Furniture Village, Wayfair and French Bedroom Company all vying for a podium spot at 6.8%.

1	DREAMS	24.1%
2	BENSONS FOR BEDS	11.4%
3	FURNITURE VILLAGE	6.8%
-	WAYFAIR	6.8%
-	FRENCH BEDROOM COMPANY	6.8%
4	DUNELM	6.2%
5	MY BED FRAMES	5.5%
6	MADE	4.4%
7	ARGOS	3.9%
8	TIME 4 SLEEP	2.7%
9	NEXT	2.0%
10	BED FACTORY DIRECT	1.8%
11	THE OAK BED STORE	1.6%
12	BEDS	1.4%
13	IKEA	1.3%

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KING BED

KINGDOM CONQUERED

Dunelm are knocked off the top spot by Dreams, who lead with a 12% market lead, finishing ahead of retail giants Argos, Made and Bensons for Beds.

1	DREAMS	26.8%
2	DUNELM	14.8%
3	ARGOS	7.0%
4	MADE	6.5%
5	BENSONS FOR BEDS	5.2%
6	TIME 4 SLEEP	4.1%
7	MY BED FRAMES	3.7%
8	CASPER	3.6%
9	FRENCH BEDROOM COMPANY	2.3%
-	BEDSTAR	2.3%
10	HAPPY BEDS	2.2%
11	NEXT	1.8%
-	MATTRESSMAN	1.8%
12	AMAZON	1.6%
13	FURNITURE VILLAGE	1.5%

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SINGLE BED

A SINGLE WINNER

We see the closest competition for first position with only a 1.9% difference between IKEA and Argos.

NEW TO MARKET

New to the single market is brand Noa and Nani in joint 10th position alongside Wayfair and Mattressman.

1	IKEA	22.0%
2	ARGOS	20.1%
3	AMAZON	9.2%
4	DUNELM	9.0%
5	DREAMS	8.1%
6	MY BED FRAMES	2.7%
7	BENSONS FOR BEDS	2.0%
8	HAPPY BEDS	1.9%
9	FRENCH BEDROOM COMPANY	1.8%
10	NOA AND NANI	1.6%
-	WAYFAIR	1.6%
-	MATTRESSMAN	1.6%
11	TIME 4 SLEEP	1.3%
12	EBAY	1.0%
-	BED STAR	1.0%

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OTTOMAN BED

DUNELM AT THE HELM

It's the first category win for Dunelm, who win the market with a huge 27.3% market share. However, with Dreams and Argos also in double figures it's tough work for smaller specialists to gain visibility.

1	DUNELM	27.3%
2	DREAMS	16.8%
3	ARGOS	13.5%
4	TIME 4 SLEEP	7.3%
5	BEDSTAR	6.2%
4	IKEA	5.1%
5	BENSONS FOR BEDS	3.6%
6	AMAZON	2.5%
7	NEXT	2.2%
8	HAPPY BEDS	1.9%
-	FURNITURE 123	1.9%
9	BED FACTORY DIRECT	1.8%
10	BED WORLD	1.7%
11	WAYFAIR	1.4%
-	THE OAK BED STORE	1.4%

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DIVAN

AN OLD LEADER

Argos are back on form and winning the Divan category with a 9.2% market lead.

THE SMALLEST NICHE

This product category was by far the smallest when it came to search volumes with less than 100,000 MSV. It also provided an opportunity for speciality retailers such as Divan Base Direct and Best Divans to secure a rightful place on the leaderboard.

1	ARGOS	27.3%
2	DREAMS	18.1%
3	WAYFAIR	9.7%
4	BENSONS FOR BEDS	8.4%
5	AMAZON	5.3%
6	IKEA	3.6%
7	DUNELM	3.5%
8	BED FACTORY DIRECT	3.3%
9	BEST DIVANS	2.7%
10	BED WORLD	2.6%
11	DIVAN BASE DIRECT	2.3%
12	BEDS	1.7%
-	FURNITURE VILLAGE	1.7%
13	EBAY	1.4%
14	MATTRESS NEXT DAY	0.8%

MATTRESSES

◀ PRODUCT CATEGORIES ▶



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ALL MATTRESSES

DREAMING BIG

Mattress giant, Dreams, soars to the top spot with a 16.3% market share ahead of overall Sleep category winner, Argos.

MATTRESS MAESTROS

A review of the mattress category sees the prominence of mattress specialist retailers Eve Sleep, Dormeo and Silent Night.

1	DREAMS	16.3%
2	ARGOS	13.3%
3	DUNELM	11.7%
4	MATTRESS ONLINE	8.5%
5	AMAZON	5.9%
6	IKEA	4.5%
7	EVE SLEEP	3.0%
8	DORMEO	2.7%
9	WAYFAIR	2.0%
10	BENSONS FOR BEDS	1.9%
11	SILENT NIGHT	1.8%
-	MATTRESS NEXT DAY	1.8%
12	EBAY	1.5%
13	MATTRESSMAN	1.2%
14	HAPPY BEDS	1.1%

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GENERAL MATTRESSES

TOP AND TAIL

Report frequenters, Dreams, continue to reign supreme topping the General Mattresses category with a 17.7% market share.

At the bottom of the league table are Mattress specialists but frequent guests, Mattressman and Dormeo.

1	DREAMS	17.7%
2	MATTRESS ONLINE	11.5%
3	EVE SLEEP	9.3%
4	DUNELM	8.9%
5	ARGOS	4.0%
6	SILENT NIGHT	3.3%
7	IKEA	2.8%
8	HAPPY BEDS	2.3%
9	MATTRESS NEXT DAY	2.1%
10	BENSONS FOR BEDS	1.4%
-	FRENCH BEDROOM COMPANY	1.4%
11	AMAZON	0.6%
-	MY BED FRAMES	0.6%
12	DORMEO	0.5%
-	MATTRESSMAN	0.5%

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DOUBLE MATTRESS

TRIPLE THREAT

Market domination continues with double figure market share from Argos, Dreams and Dunelm respectively.

BIG BRAND PERFORMANCE

Despite featuring infrequently, the double mattress category features a host of prominent retailers including John Lewis and eBay.

1	ARGOS	22.1%
2	DREAMS	17.5%
3	DUNELM	10.5%
4	AMAZON	9.5%
5	MATTRESS ONLINE	7.6%
6	BENSONS FOR BEDS	3.7%
7	EBAY	3.1%
8	IKEA	2.8%
-	WAYFAIR	2.8%
9	MATTRESSMAN	2.7%
10	MATTRESS NEXT DAY	2.4%
11	MY BED FRAMES	1.4%
12	DORMEO	1.2%
-	JOHN LEWIS	1.2%
13	HAPPY BEDS	1.0%

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MEMORY FOAM

NEW CHALLENGER

Memory Foam Warehouse secure 11th position in their specialist category, in their only table placing of this report. It's not quantity...

BIG SIX

With six retailers securing a +7% SOV in the Memory Foam category we have a new record in this competitive marketplace.

1	DUNELM	20.6%
2	ARGOS	11.4%
-	IKEA	11.4%
3	DREAMS	10.6%
4	AMAZON	7.5%
5	DORMEO	7.4%
6	NEXT	3.5%
7	MATTRESS ONLINE	3.1%
8	HAPPY BEDS	2.9%
9	EBAY	2.7%
10	EVE SLEEP	2.6%
11	MEMORY FOAM WAREHOUSE	2.4%
12	WAYFAIR	2.0%
13	MATTRESS NEXT DAY	0.5%
14	BEDS	0.4%

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SINGLE MATTRESS

BUNKING UP

More of the big multiline retailers feature in this product category than in any other, with Argos, Dreams, Dunelm, Amazon, Ikea, Wayfair and eBay usurping some of the specialist brands we've seen feature more heavily throughout this report.

1	ARGOS	26.6%
2	DREAMS	15.8%
3	DUNELM	12.1%
4	AMAZON	11.6%
5	IKEA	7.5%
6	WAYFAIR	3.6%
7	EBAY	2.6%
8	MATTRESS ONLINE	2.4%
9	SILENT NIGHT	2.3%
10	HAPPY BEDS	1.9%
11	MATTRESS MAN	1.5%
12	FRENCH BEDROOM COMPANY	1.2%
13	MY BED FRAMES	1.0%
14	BENSONS FOR BEDS	0.8%
15	DORMEO	0.5%

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KING MATTRESS

SLEEPING GIANT

Dreams rounds off their status as Mattress champions with 23.4% market share and a 9.2% lead on Argos for presence in the SERPs for 'king mattress' related keywords.

1	DREAMS	23.4%
2	ARGOS	14.2%
3	DUNELM	12.5%
4	MATTRESS ONLINE	10.2%
5	AMAZON	5.4%
6	BENSONS FOR BEDS	4.7%
7	MATTRESS NEXT DAY	4.0%
8	SILENT NIGHT	3.0%
9	JOHN LEWIS	2.4%
-	WAYFAIR	2.4%
10	MATTRESSMAN	2.1%
11	EBAY	1.5%
-	DORMEO	1.5%
-	TIME 4 SLEEP	1.5%
12	FRENCH BEDROOM COMPANY	1.4%

KEYWORD OPPORTUNITIES

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HIDDEN GEMS

Next up, we're looking at keywords.

We've reviewed each of the **1,000+ keywords** used to calculate the brand SOV rankings in the last section to see which have seen the biggest changes in the past 12 months.

We've analysed the year-on-year volumes of each to identify the winners and losers, based on surges and drops in their monthly search volumes.

*monthly data gathered through ahrefs



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KEYWORD WINNERS

WE RATE RATTAN

With a 100% increase in monthly search volume for 'Rattan Bed Frame' and 50% increase for 'Rattan Bed' it's clear the boho chic design trend that has taken over Pinterest feeds isn't going anywhere.

SPACE SAVERS

With us all spending more time at home - clever storage solutions is a must and this trend hasn't escaped our bed hunt either.

KEYWORD	% CHANGE	NEW VOLUME P/M
ALASKAN KING BED	+133%	2100
RATTAN BED FRAME	+100%	2400
BRASS BED FRAME	+100%	800
FOLD UP BEDS	+78%	1600
FRENCH STYLE BEDS	+71%	1200
DOUBLE LOFT BED	+69%	2700
JAPANESE BEDS	+60%	800
FOLD UP BED	+55%	6200
RATTAN BED	+50%	4800
SOFA BED WITH STORAGE	+44%	5600
CHESTERFIELD SOFA BED	+40%	2800
OAK BED	+38%	2200
BED WITH STORAGE	+36%	6400
RATTAN DAY BED	+29%	2700
CLICK CLACK SOFA BED	+20%	5900
BED IN A BOX	+18%	5800

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KEYWORD LOSERS

CRUSHING DEFEAT

The news is in and crushed velvet has had its day with searches for various crushed velvet terms all seeing huge decreases YoY.

GREY NO MORE

Grey had a huge moment in 2020 but search trends suggest we're not so fond of 50 shades of grey in our bedrooms anymore...

KEYWORD	% CHANGE	NEW VOLUME P/M
VELVET BED	-83%	1100
CRUSHED VELVET SLEIGH BED	-79%	300
CRUSHED VELVET BED	-78%	4100
PINK CRUSHED VELVET BED	-76%	200
LOW BED FRAMES	-64%	800
GREY BED	-57%	3100
CALIFORNIA KING BED	-48%	1400
GREY DOUBLE BED	-47%	2000
GREY BED FRAME	-46%	1400
PLATFORM BED	-45%	6000
MEMORY FOAM MATTRESS	-42%	35000
DESK BED	-36%	2500
BED WITH TV	-35%	4200
VELVET OTTOMAN BED	-29%	500
PINK BED	-27%	1100

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POWERED BY NATURAL EDGE

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THE SECRET BEHIND THE INSIGHT

This insight and results used in this report have been generated through Natural Edge™, our proprietary share-of-voice software.

Natural Edge™, developed here at Fusion Unlimited HQ, was built to help brands gain greater visibility in local search. Taking any keyword from any sector, Natural Edge™ scans and analyses local search results with a nationwide lens, enabling you to discover your position for any search term in any location in the UK and unlock the full potential of your online strategy.

It's already helped brands such as Halfords, Q-Park and Vertu Motors to shape their strategy. If you'd like to see what it could do for you, get in touch with the team for a complimentary audit.

natural edge

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THANK YOU

I hope you found these insights useful. I'd welcome you to get in touch if you have any questions around anything we've discussed throughout this report.

The Beds & Mattresses space is full of opportunity when it comes to keywords. But there's more to consider than just the low-hanging fruit we've mentioned in this report. The highly competitive terms are harder to acquire but worth the battle.

Do you want to find out a little bit more about your own performance? Get in touch and we will delve a little deeper to show exactly how you fared in more detail.

REQUEST YOUR FREE AUDIT TODAY

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FULL BRAND TABLE: TOP 50

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1	ARGOS	16.1%	-	HABITAT	1.0%	22	FURNITURE 123	0.3%
2	DREAMS	12.6%	16	FURNITURE VILLAGE	0.9%	-	CASPER	0.3%
3	IKEA	10.4%	-	THE RANGE	0.9%	-	NOA AND NANI	0.3%
4	DUNELM	10.2%	17	BEDSTAR	0.8%	-	JOHN LEWIS	0.3%
5	AMAZON	5.7%	18	SOFOLGY	0.7%	-	FUTON COMPANY	0.3%
6	BENSONS FOR BEDS	3.2%	-	NEXT	0.7%	23	BEDS	0.2%
7	WAYFAIR	3.1%	19	ROOM TO GROW	0.6%	-	TELLY BEDS	0.2%
8	MADE	2.7%	-	BED FACTORY DIRECT	0.6%	-	MEMORY FOAM WAREHOUSE	0.2%
9	MATTRESS ONLINE	1.8%	-	THE OAK BED STORE	0.6%	-	JOHN RYAN BY DESIGN	0.2%
10	DFS	1.7%	-	SILENT NIGHT	0.6%	-	BED GURU	0.2%
11	EBAY	1.4%	20	MATTRESS NEXT DAY	0.5%	24	ARCHERS SLEEP CENTRE	0.1%
-	MY BED FRAMES	1.4%	-	DORMEO	0.5%	-	BED KINGDOM	0.1%
12	HAPPY BEDS	1.3%	-	GET LAID BEDS	0.5%	-	M SOFAS	0.1%
13	FRENCH BEDROOM COMPANY	1.2%	21	CUCKOOLAND	0.4%	-	DIVAN BASE DIRECT	0.1%
14	TIME 4 SLEEP	1.1%	-	EVE SLEEP	0.4%	-	OVERSTOCK	0.1%
15	MATTRESSMAN	1.0%	-	TV BED	0.4%	-	OAK FURNITURE LAND	0.1%
							BEDTIME SUPERSTORES	0.1%

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