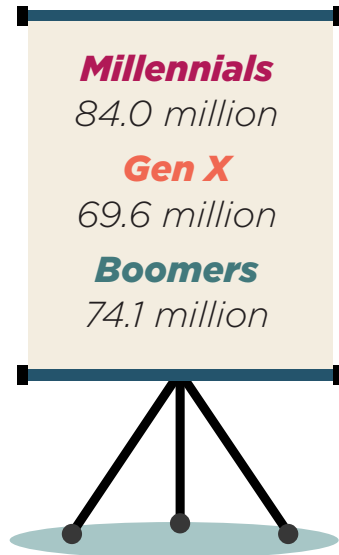


## Why Map the Millennial Buyer Journey?

**They're the largest generation ever**



**They've started buying mattresses: 24-39 years old**



**While they tend to spend less on each individual mattress purchase, they spend more money on sleep than older people**

- Replace mattress more often (**every 5.3 years vs. Boomers 10.7 years**)
- More likely to buy **bedding accessories** along with their mattress

**74%** of Millennials buy bedding accessories along with a new mattress vs. **54%** of Boomers

And they are significantly more likely to buy sleep technology (**49%** vs. **12%** Boomers)

**They need help shopping**

Half of **Millennial buyers** are very satisfied with their new mattress (49%) compared to 65% of **Boomers**

**20%** of Millennials return their new mattress vs. **6%** of Boomers

**7 in 10 Millennials** say they'd shop differently for a mattress next time vs. **4 in 10 Boomers**

## Reasons for the journey

**Life change** (e.g., new house, home improvement project, marriage/divorce)



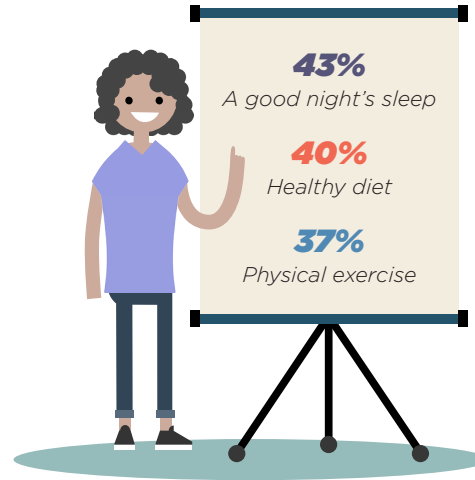
**Issues with their mattress** (e.g., too old, poor sleep, sagging)

**Desire for a different mattress** (e.g., size, technology)

### What do you need to know about them?

They view sleep as one of the top factors in their health and well-being, ahead of diet and exercise.

Which of the following factors do you believe are the **most important** for your **health and well-being**?



They are more likely to be **poor than excellent sleepers**. And they are **more sleep-deprived than Boomers**.

39% of **Millennials** feel they do not get enough sleep vs. 34% of **Boomers**

SOURCE: State of America's Sleep 2019, Better Sleep Council.

## What they know/don't know

### know about

**Size** of mattress they want

**Budget** they want to spend

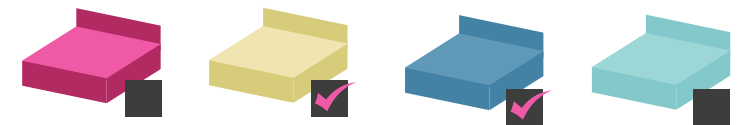
If they'll purchase online or at brick-and-mortar **location**

**Type** of mattress they want (e.g., spring, foam)

### don't know as much about

**Features** they want (e.g., motion isolation, adjustable support, temperature control)

Specific store or **retailer** they'll purchase from



## What they are feeling

**optimism** **joy**  
**anticipation**



### Insights and tips:

**Consistent advertising can help get you in their small consideration set**

**Connect to what's important to them:** Health benefits of a good night's sleep • Health benefits of a new mattress • Changing a mattress when moving into a new home • How a smart mattress or technology can help them get better sleep

### Journey length

31% **less than a week**

48% **1-4 weeks**

19% **1 month or more**

**What they're not thinking of enough compared to very satisfied buyers**

- ✓ Health benefits of sleep and mattress
- ✓ Warranty
- ✓ In-store displays

### What they want to learn about a mattress

**Qualities**  
(e.g., comfort, firmness, odorless, stainless, temperature control)

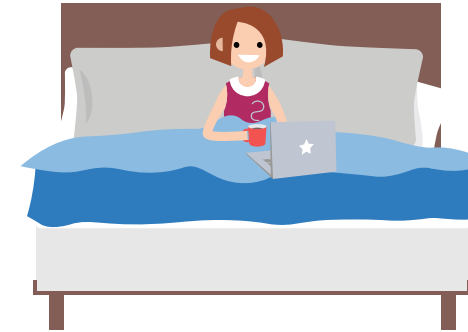
**Type** (e.g., spring, foam)



**# of mattresses considered:**

**65%** consider one or two mattresses

### Where they look for information



**Web search**

**Customer reviews and ratings**

**In-store displays**

**Mattress manufacturer website**

**Family and friends offline**

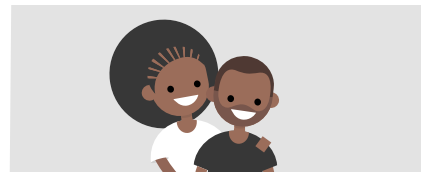
**Online-only retailer websites**

**Millennials use 3 touchpoints on average when exploring mattresses (very satisfied buyers use 4).**

Millennials are less likely to use in-store displays than very satisfied buyers.

### What they are feeling

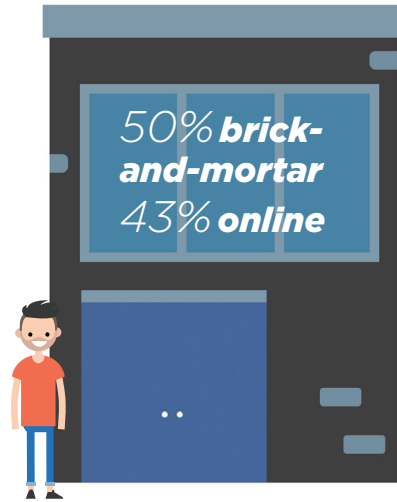
**optimism** **serenity/joy**  
**anticipation**



### Insights and tips:

Help shoppers develop a personalized want list when they shop • Amp up the in-store experience, personalize it and align it with digital to create an omnichannel experience for shoppers • Don't be surprised if they don't buy on their first visit - give them reasons to come back • Too many choices make it hard to choose - find ways to simplify their decisions • Tell a sustainability story if you have one

**Where they buy**



**What they buy with their mattress**

**7 in 10 Millennials buy bedding accessories along with a new mattress:**

- 34%** sheets
- 36%** pillows
- 23%** comforters or duvets
- 27%** mattress protectors
- 21%** mattress pads
- 20%** bed covers and decorative pillows
- 19%** mattress toppers
- 66%** mattress foundations



**Half of Millennials use sleep technology including tracking devices, such as:**

**Apple Watch®, Fitbit 28% sleep tracking app 23% mattress-connected sleep tracker 19%**

**What they are likely to base their selection on**

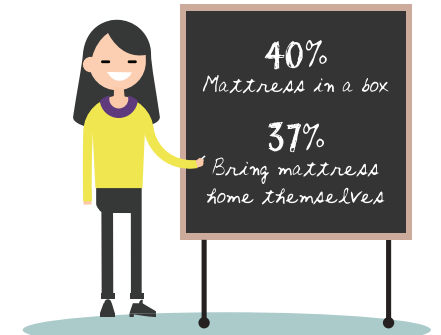
**Free delivery** **Size** **Sales, discounts, promotions**

**Qualities** (e.g., comfort, firmness, odorless, stainless, temperature control) **Price**

**What they are more likely to be interested in buying than others**

- ✓ 1. Pillow top
- ✓ 2. Foam mattress
- ✓ 3. King or California King mattress

**What their preferred delivery method is**



**Insights and tips:**

**Consider selling accessories or bundling mattress with accessories to increase the shopping basket**

**Again - make it personalized and simplify their choices**

**Make pickup or delivery easy and painless**

**What they are feeling**

**serenity** **trust**  
**anticipation**



# Millennial Buyer Journey

## PHASE 1. TRIGGER

### Reasons for the journey

**Life change** (e.g., new house, home improvement project, marriage/divorce)

**Issues with their mattress** (e.g., too old, poor sleep, sagging)

**What do you need to know about them?**  
They view sleep as one of the top factors in their health and well-being, ahead of diet and exercise.

### Health

**Desire for a different mattress** (e.g., size, technology)

**Retail sale/advertising**



Which of the following factors do you believe are the **most important** for your health and well-being?

They are more likely to be **poor than excellent sleepers**. And they are **more sleep-deprived than Boomers**.

39% of **Millennials** feel they do not get enough sleep vs. 34% of **Boomers**

SOURCE: State of America's Sleep 2019, Better Sleep Council.

### What they know/don't know

#### know about

**Size** of mattress they want

**Budget** they want to spend

If they'll purchase online or at brick-and-mortar **location**

**Type** of mattress they want (e.g., spring, foam)

#### don't know as much about

**Features** they want (e.g., motion isolation, adjustable support, temperature control)

Specific store or **retailer** they'll purchase from

### What they are feeling

**optimism** **joy**  
**anticipation**



### Insights and tips:

**Consistent advertising can help get you in their small consideration set**

**Connect to what's important to them:** Health benefits of a good night's sleep • Health benefits of a new mattress • Changing a mattress when moving into a new home • How a smart mattress or technology can help them get better sleep

## PHASE 2. EXPLORATION/EVALUATION

### Journey length

31% **less than a week**  
48% **1-4 weeks**  
19% **1 month or more**

### What they want to learn about a mattress

**Qualities** (e.g., comfort, firmness, odorless, stainless, temperature control)

**Type** (e.g., spring, foam)

**Sales, discounts, promotions**

**Size**  
**Price**

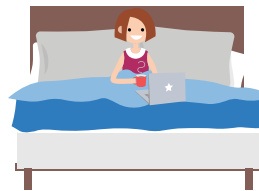


### What they're not thinking of enough compared to very satisfied buyers

- ✓ Health benefits of sleep and mattress
- ✓ Warranty
- ✓ In-store displays

### Where they look for information

- Web search
- Customer reviews and ratings
- In-store displays
- Mattress manufacturer website
- Family and friends offline
- Online-only retailer website



**# of mattresses considered:**  
65% consider one or two mattresses

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Millennials are less likely to use in-store displays than very satisfied buyers.

### What they are feeling

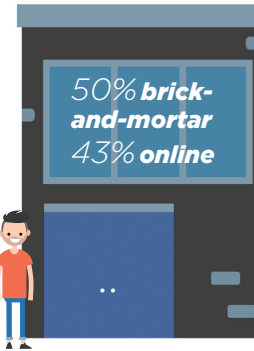
**anticipation**  
**optimism** **serenity/joy**

### Insights and tips:

Help shoppers develop a personalized want list when they shop • Amp up the in-store experience, personalize it and align it with digital to create an omnichannel experience for shoppers • Don't be surprised if they don't buy on their first visit - give them reasons to come back • Too many choices make it hard to choose - find ways to simplify their decisions • Tell a sustainability story if you have one

## PHASE 3. SELECTION/PURCHASE

### Where they buy



### What they are more likely to be interested in buying than others

- ✓ Pillow top
- ✓ Foam mattress
- ✓ King or California King mattress

### What they are likely to base their selection on

- Free delivery
- Size
- Qualities (e.g., comfort, firmness, odorless, stainless, temperature control)
- Price
- Sales, discounts, promotions

### What they buy with their mattress

7 in 10 Millennials use bedding accessories along with a new mattress:

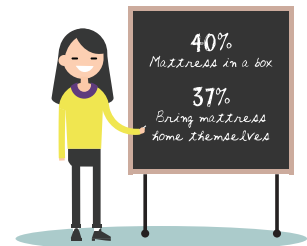
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Half of Millennials buy sleep technology including tracking devices, such as:

- Apple Watch\*, Fitbit 28% **sleep tracking app** 23%
- mattress-connected sleep tracker 19%

### What their preferred delivery method is



### What they are feeling

**anticipation**  
**trust** **serenity**

### Insights and tips:

- Use cross-selling and bundling to increase the shopping basket
- Again - make it personalized and simplify their choices
- Make pickup or delivery easy and painless