**Why Map the Millennial Buyer Journey?**

They're the largest generation ever

<table>
<thead>
<tr>
<th>Millennials</th>
<th>84.0 million</th>
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<tbody>
<tr>
<td>Gen X</td>
<td>69.6 million</td>
</tr>
<tr>
<td>Boomers</td>
<td>74.1 million</td>
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</tbody>
</table>

Millennials

84.0 million

Gen X

69.6 million

 Boomers

74.1 million

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

Millennial Buyer Journey: PHASE 1. TRIGGER

**Reasons for the journey**

**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.

**What they are feeling**
- optimism
- joy
- anticipation

**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

**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

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

**NOTE:** Results based on survey of 150 buyers who purchased a mattress in the past year (602 Millennials, 426 Gen Xers, 473 Boomers). Survey fielded November 2019.
Millennial Buyer Journey: PHASE 2. EXPLORATION/EVALUATION

**Journey length**

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

**What they are feeling**

- Optimism
- Serenity/joy
- Anticipation

**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)
- **Sales, discounts, promotions**
- **Price**
- **Size**

**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.

**# of mattresses considered:**

- **65%** consider one or two mattresses

**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

**NOTE:** Results based on survey of 150 buyers who purchased a mattress in the past year (602 Millennials, 426 Gen Xers, 473 Boomers). Survey fielded November 2019.
Millennial Buyer Journey: **PHASE 3. SELECTION/PURCHASE**

### Where they buy
- 50% brick-and-mortar
- 43% online

### 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

### What they are likely to base their selection on
- **Qualities** (e.g., comfort, firmness, odorless, stainless, temperature control)
- **Size**
- **Price**
- **Free delivery**
- **Sales, discounts, promotions**

### What they are feeling
- Serenity
- Trust
- Anticipation

### 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
- 40% Mattress in a box
- 37% Bring mattress home themselves

### 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.

**NOTE:** Results based on survey of 150 buyers who purchased a mattress in the past year (602 Millennials, 426 Gen Xers, 473 Boomers). Survey fielded November 2019.
Millennial Buyer Journey

PHASE 1. TRIGGER

Reasons for the journey
- Health
- Desire for a different mattress
- Retail sale/advertising

What they know/don’t know
- Knowledge of a new mattress
- Changing a mattress when moving into a new home
- How a smart mattress connects to what’s important to them:
  - Consistent advertising can help get you in their small consideration set

Insights and tips:
- Help shoppers develop a personalized want list when they shop: Amplify 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
- Don’t be afraid to personalize it and align it with digital to create an omnichannel experience for shoppers.

PHASE 2. EXPLORATION/EVALUATION

What they want to learn about a mattress
- Health benefits of sleep and mattress
- Warranty
- In-store displays

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.

Number of mattresses considered: 65% consider one or two mattresses

What they're not thinking of enough compared to very satisfied buyers
- Health benefits of sleep and mattress

What they buy with their mattresses
- Pillow top
- Foam mattress
- King or California King mattress

PHASE 3. SELECTION/PURCHASE

Where they buy
- Free delivery
- Size

What they are more likely to be interested in buying than others
- What they need to know about their mattresses

What they are feeling
- Optimism
- 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

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