

KEY TAKEAWAYS:

MOVING TRENDS HAVE
WORSENEED SEQUENTIALLY
OVERALL, BUT RH
CUSTOMERS ARE MORE
LIKELY TO BE CURRENTLY
LOOKING FOR FURNITURE.

CONSUMERS HAVE SHOWN
AN INCREASING PREFERENCE
FOR BUYING FURNITURE
ONLINE, ESPECIALLY RH
CUSTOMERS.

ASHLEY FURNITURE AND
WAYFAIR HAVE GAINED A
GOOD DEAL OF UNAIDED
MINDSHARE AND HAVE
INCREASED THEIR MARKET
SHARE POSITION OVER TIME.

CONSUMERS ARE
INCREASINGLY ASSOCIATING
RH WITH “UNIQUE” AND
“QUALITY” AND LESS WITH
“EXPENSIVE” OVER TIME.

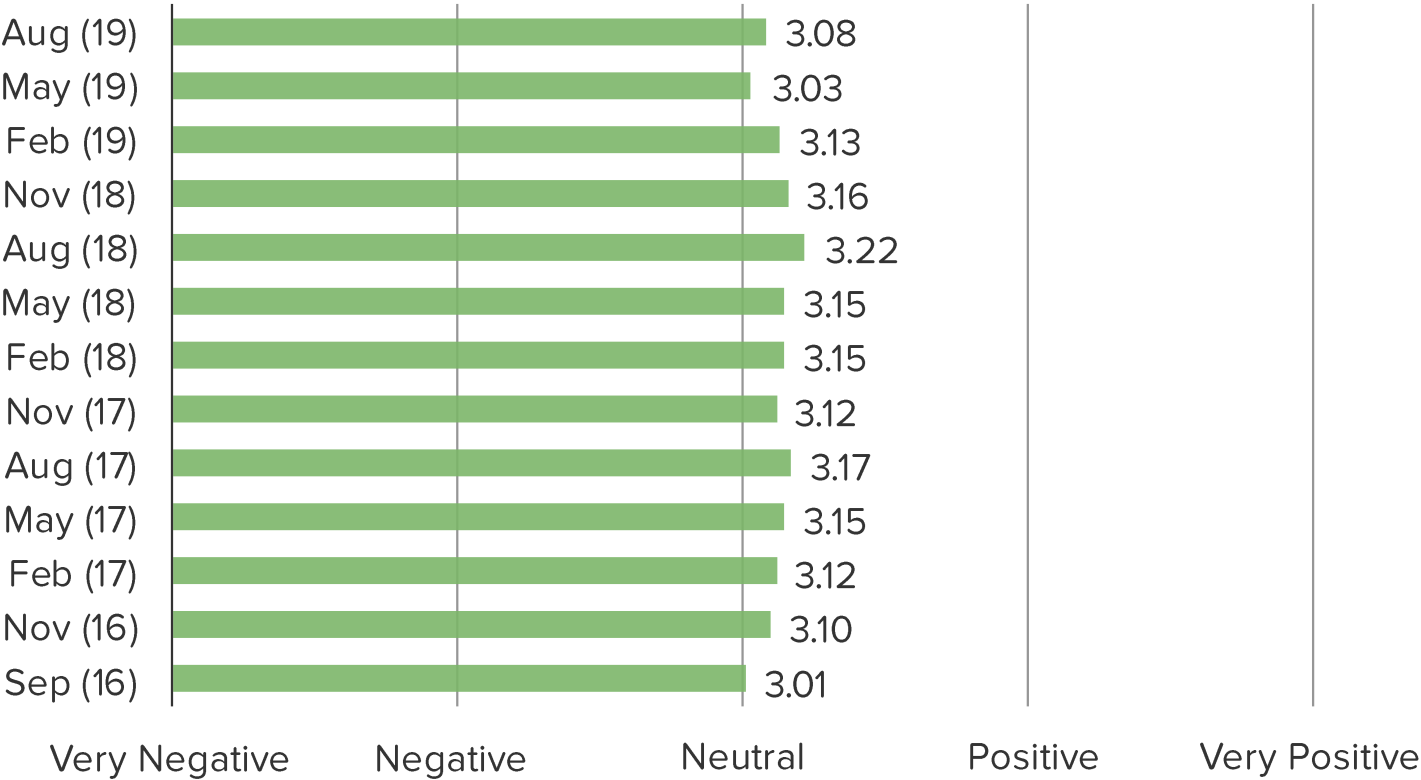
OVER TIME, CONSUMERS
WHO ARE AWARE OF RH ARE
INCREASINGLY LIKELY TO
INCLUDE IT IN FURNITURE
SEARCHES.

A DECLINING PERCENTAGE
OF RESPONDENTS WHO OWN
ITEMS FROM RH ARE GREY
CARD PROGRAM MEMBERS.

MACRO FACTORS

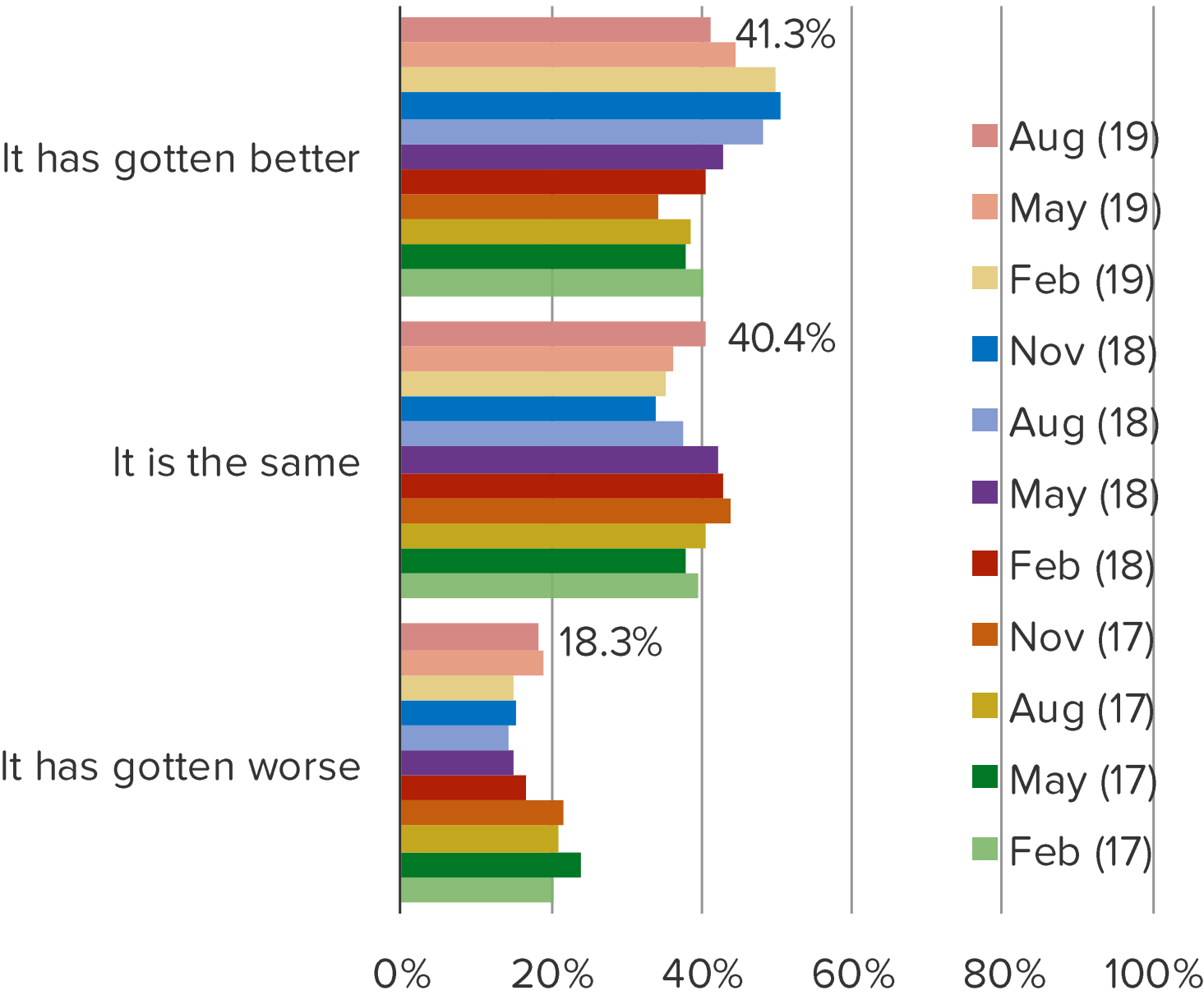
FEELINGS ABOUT CURRENT FINANCIAL SITUATION

Posed to all respondents



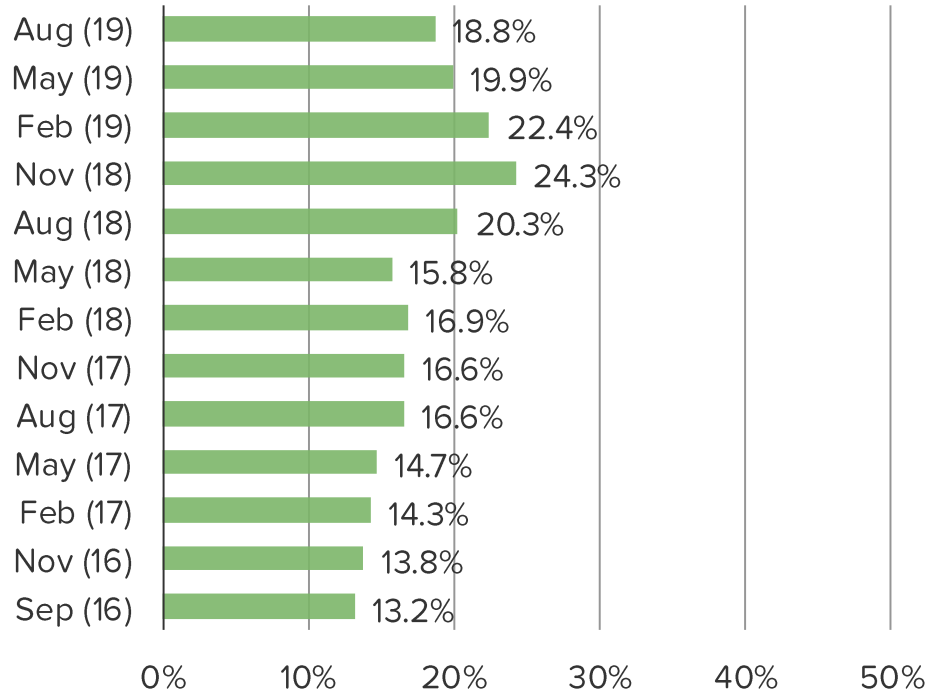
FINANCIAL SITUATION COMPARED TO LAST YEAR

RESPONDENTS WHO OWN ONE OR MORE ITEMS FROM RESTORATION HARDWARE
(COMBINING RESPONDENTS FROM FEBRUARY, MAY, AND AUGUST)

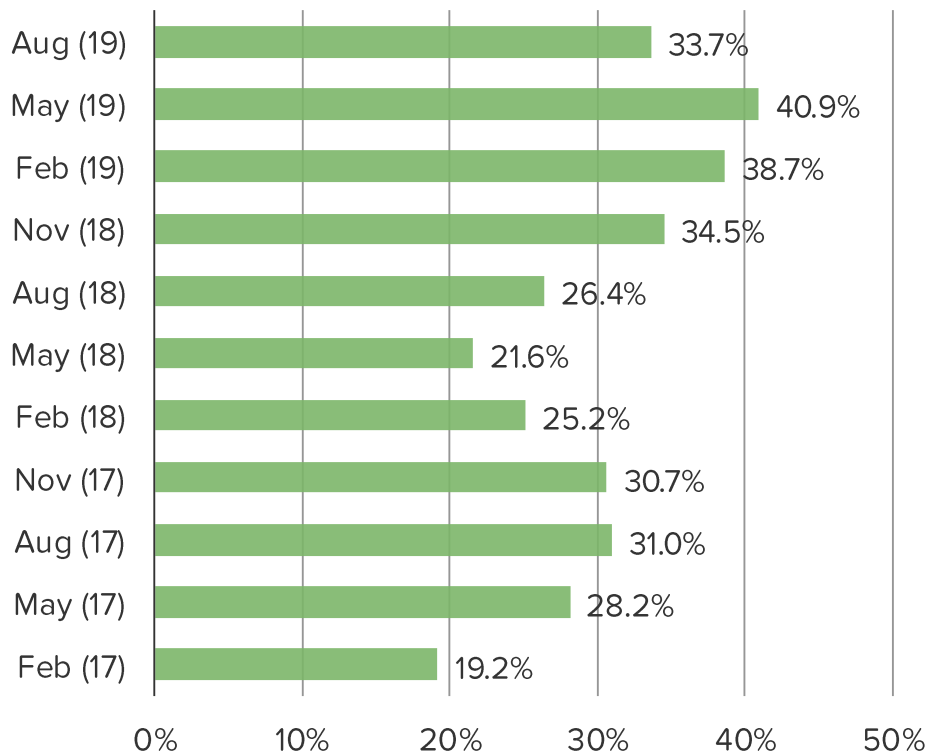


HAS MOVED IN THE PAST SIX MONTHS

Posed to all respondents

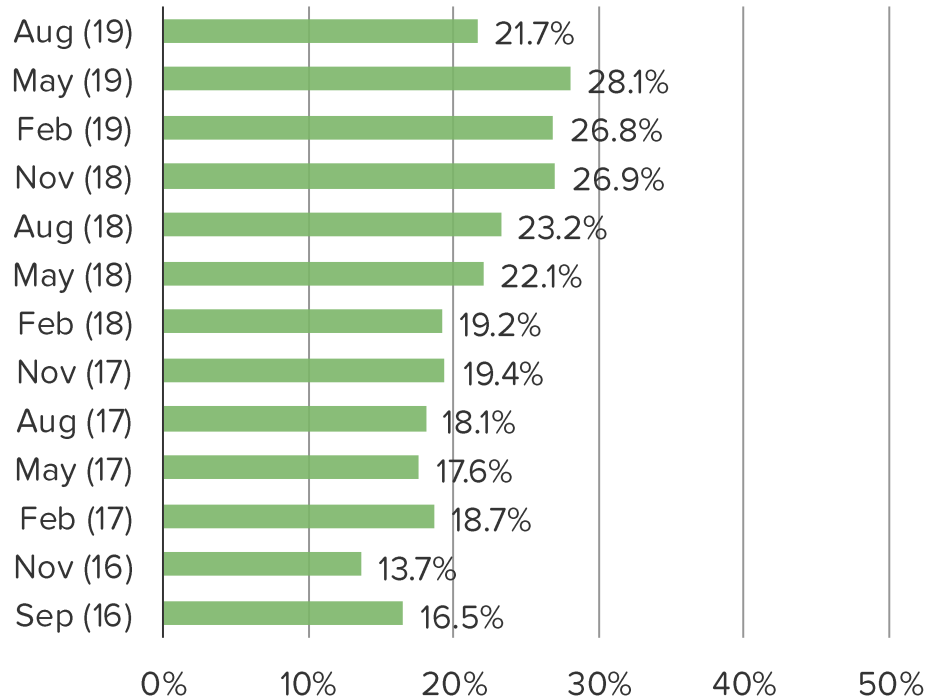


RESPONDENTS WHO OWN ONE OR MORE ITEMS FROM RESTORATION HARDWARE (THE CHART BELOW IS A THREE QUARTER MOVING AVERAGE)

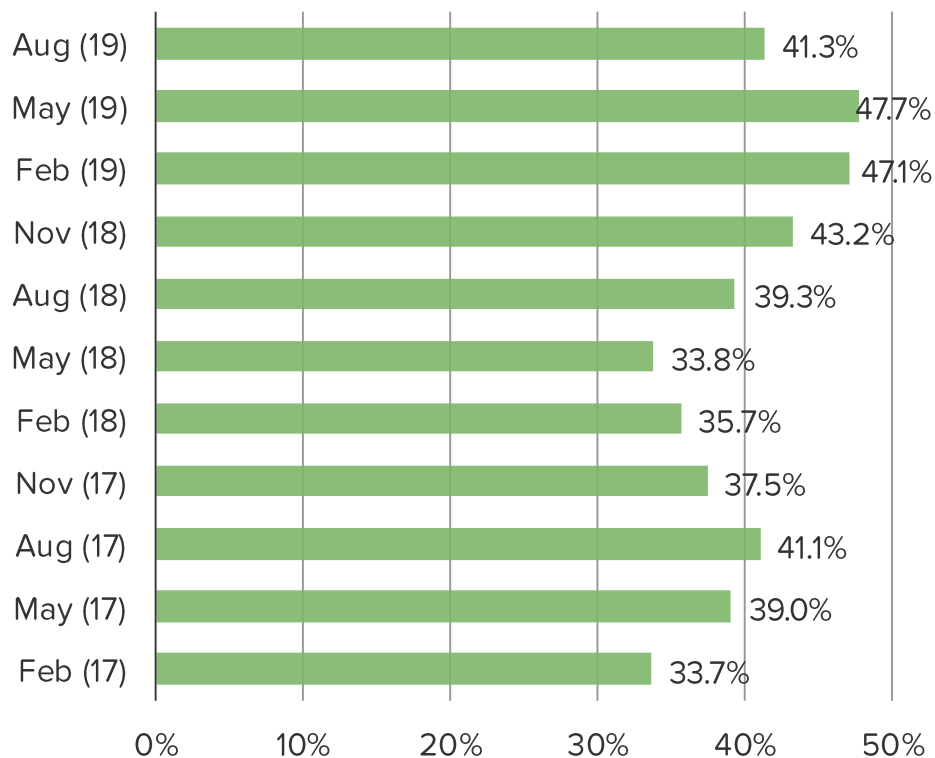


PLANS TO MOVE IN NEXT FEW MONTHS

Posed to all respondents

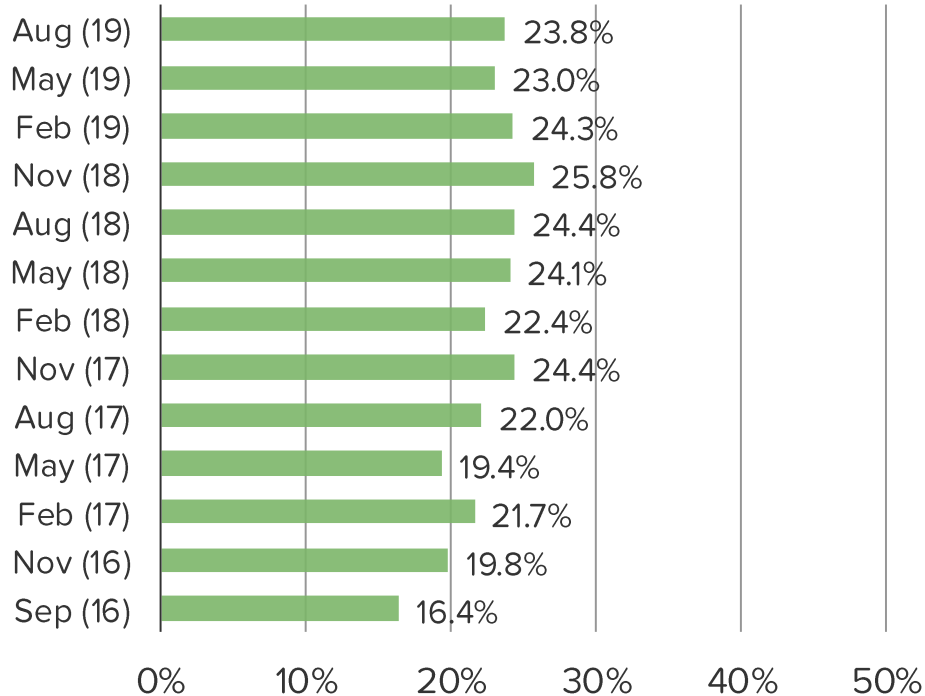


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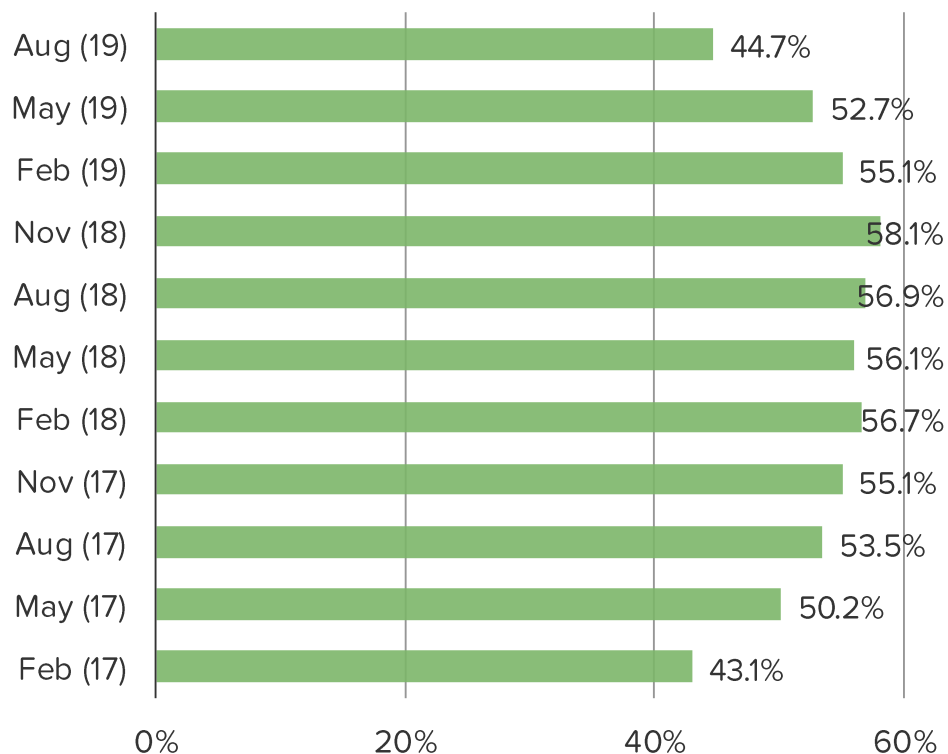


RENOVATED OR REMODELED HOME IN PAST SIX MONTHS

Posed to all respondents

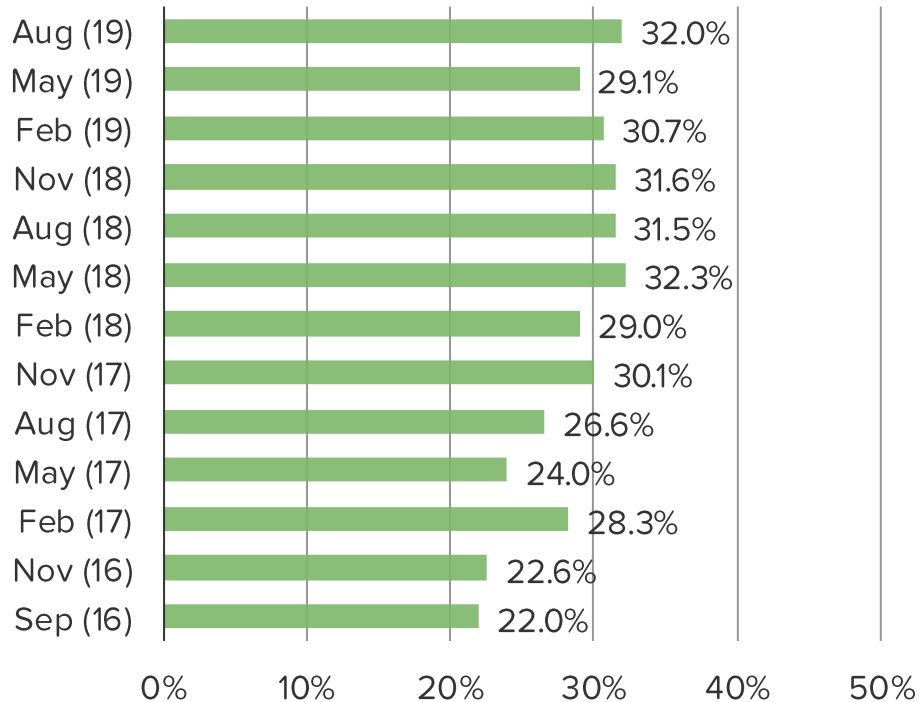


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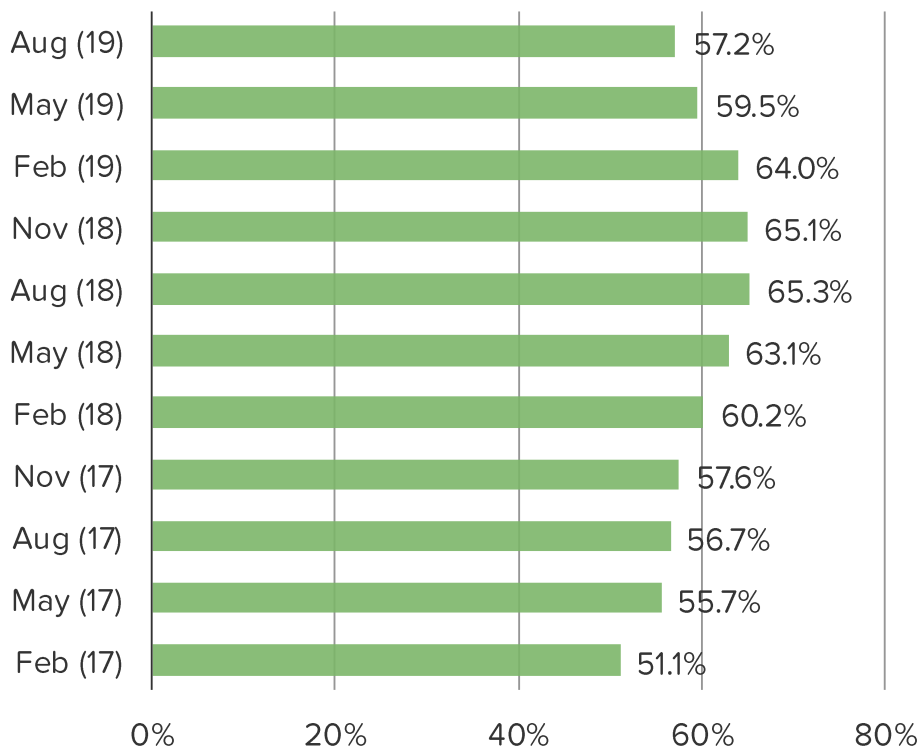


PLANS TO RENOVATE OR REMODEL IN NEXT FEW MONTHS

Posed to all respondents



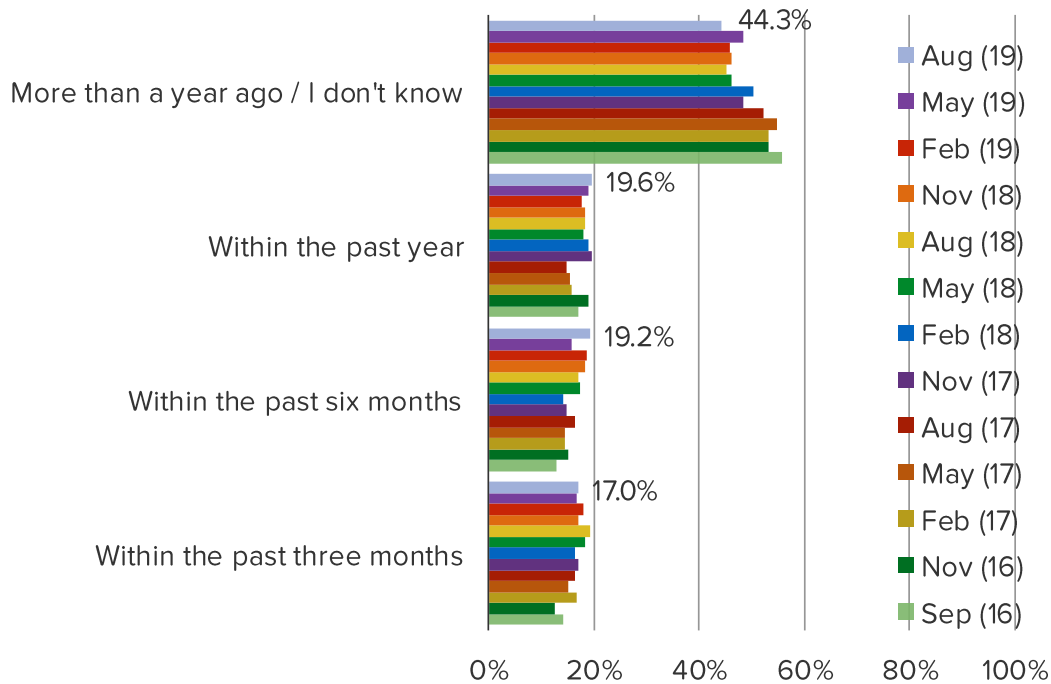
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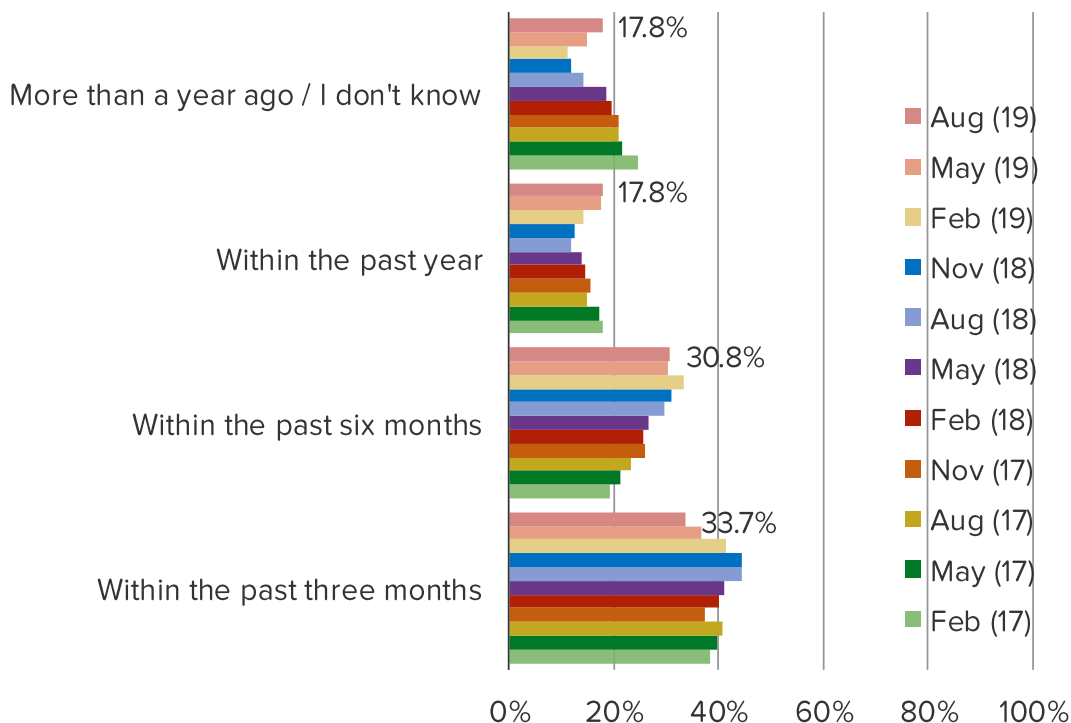
FURNITURE PURCHASES

LAST TIME PURCHASING FURNITURE FOR HOME

Posed to all respondents

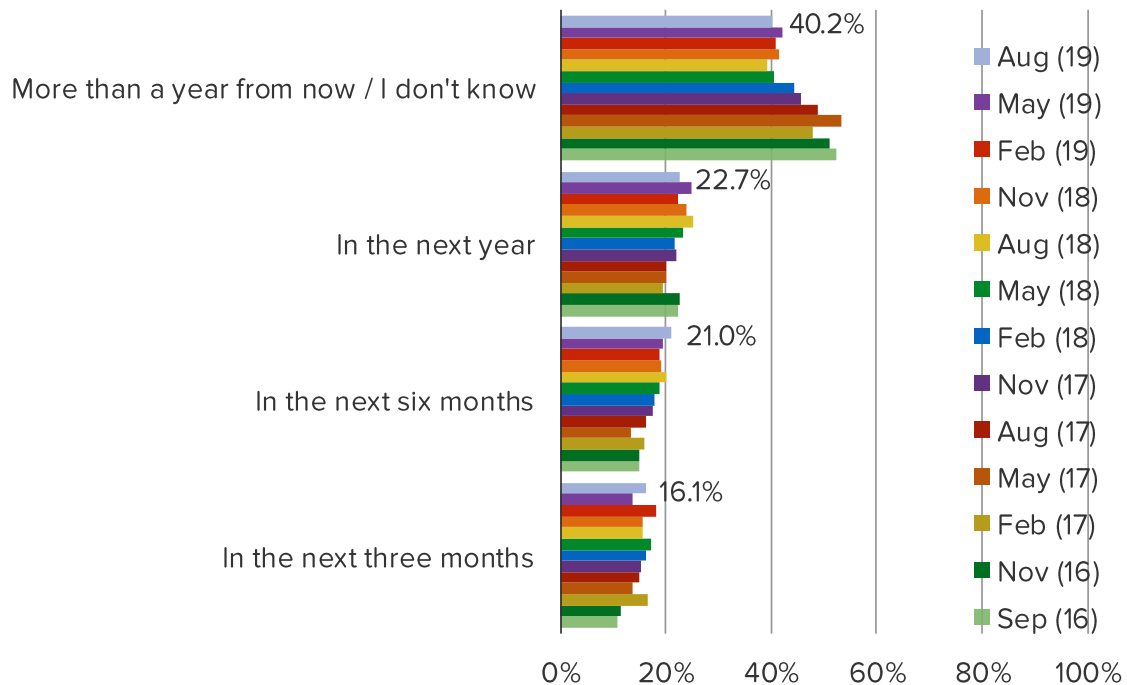


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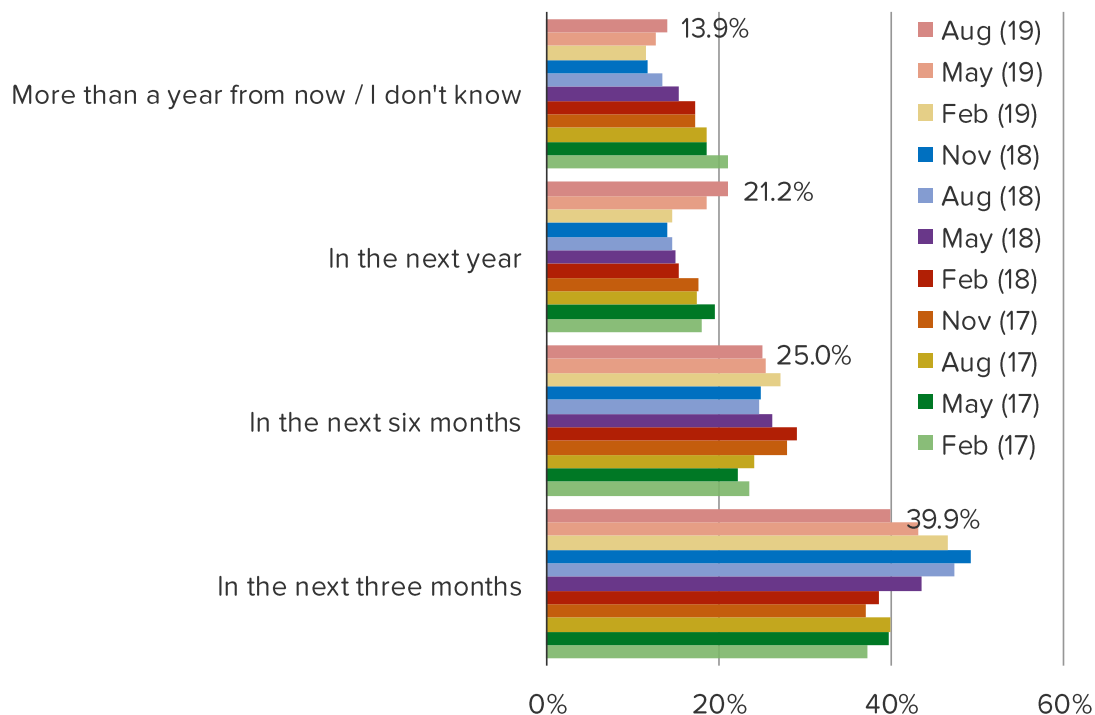


WHEN THEY EXPECT TO BUY FURNITURE FOR THEIR HOME

Posed to all respondents

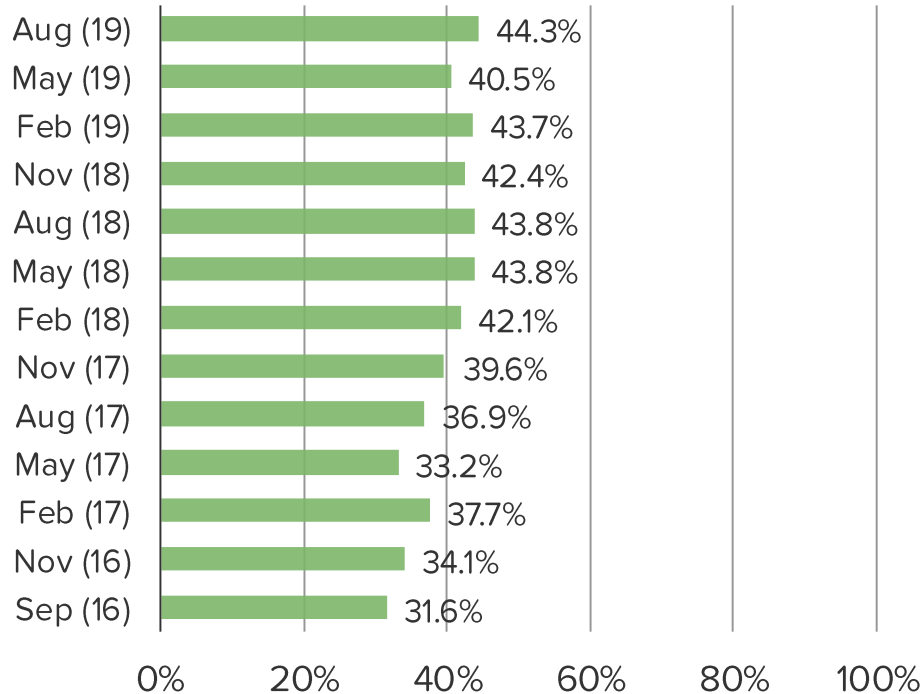


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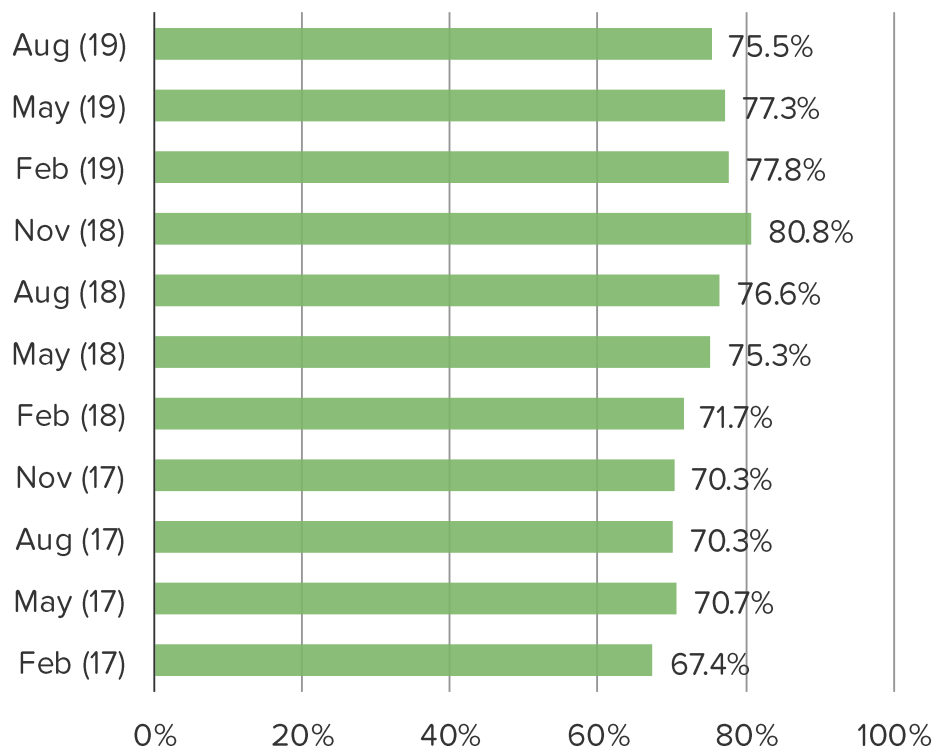


ARE YOU CURRENTLY IN THE PROCESS OF LOOKING TO BUY FURNITURE?

Posed to all respondents

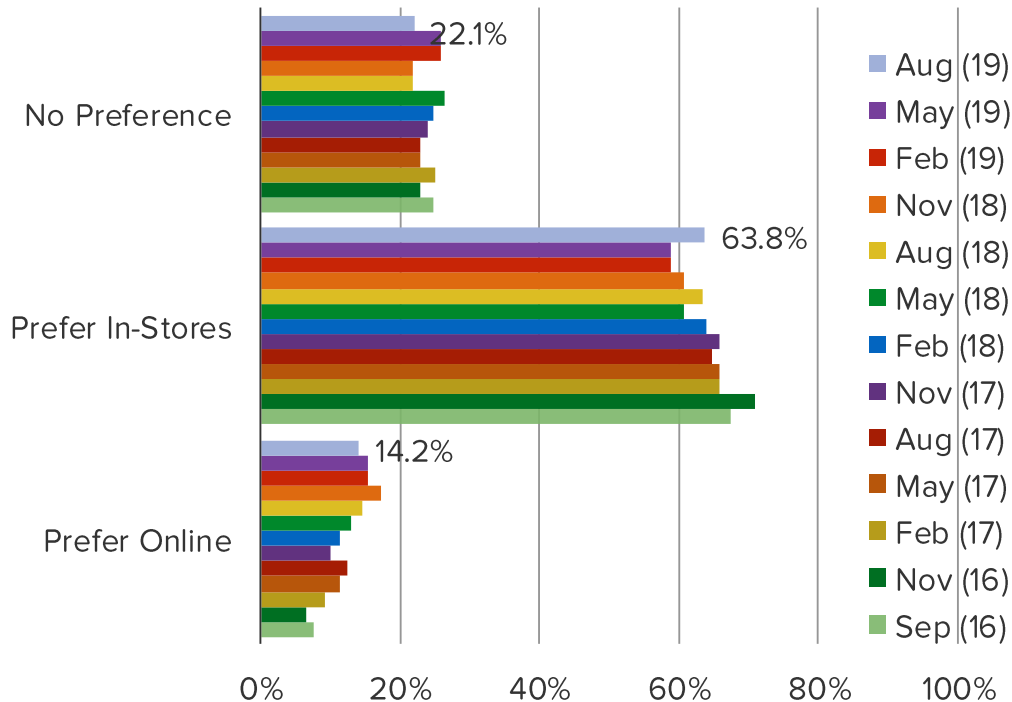


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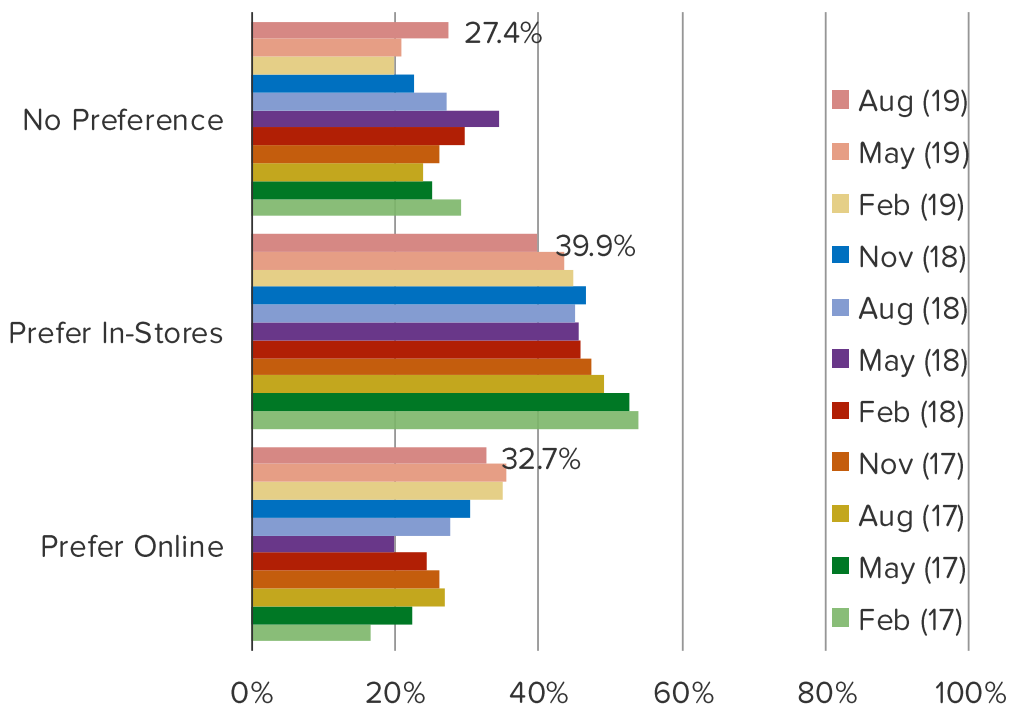


WHERE DO YOU PREFER TO BUY FURNITURE?

Posed to all respondents



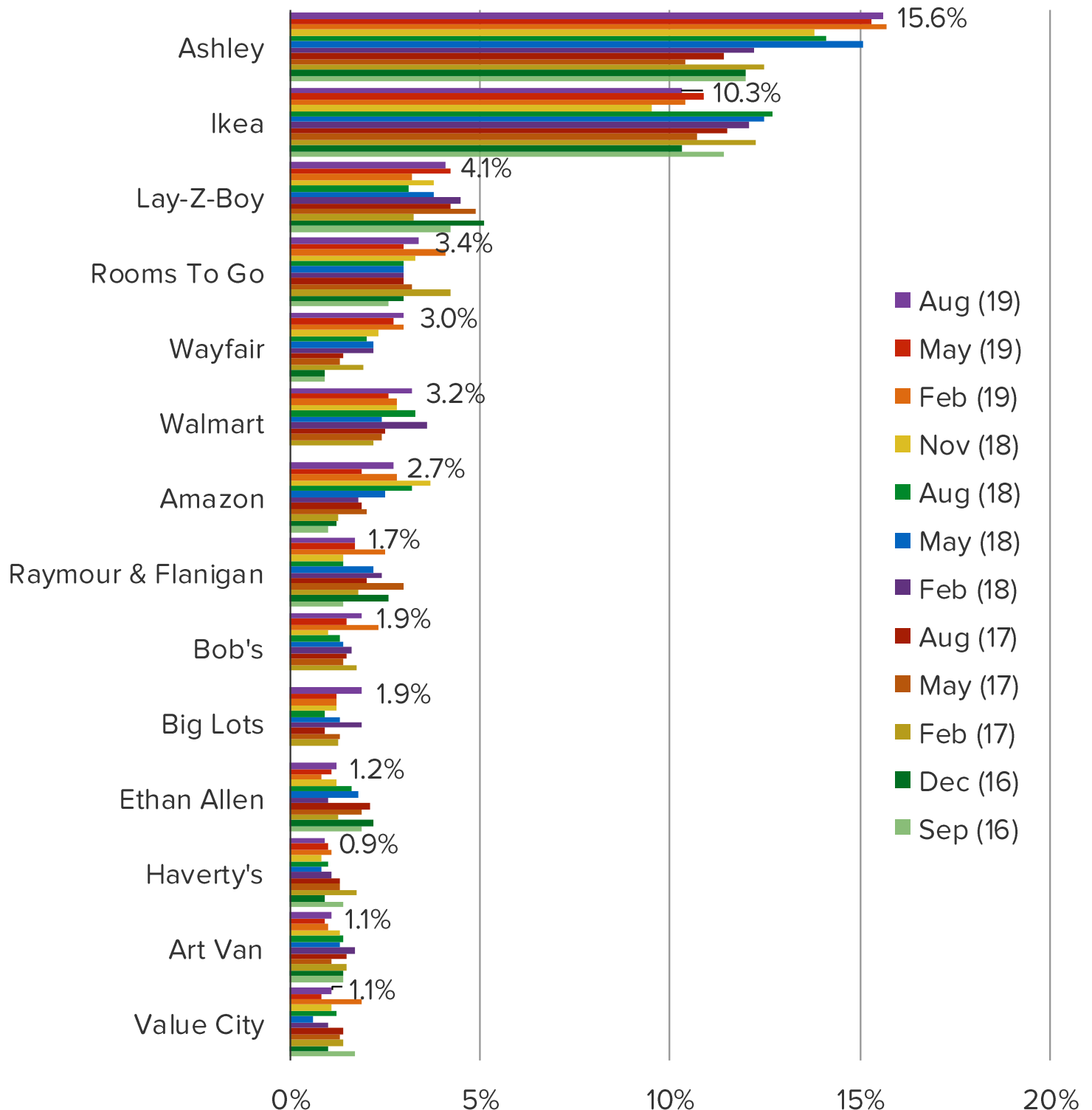
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BRANDS

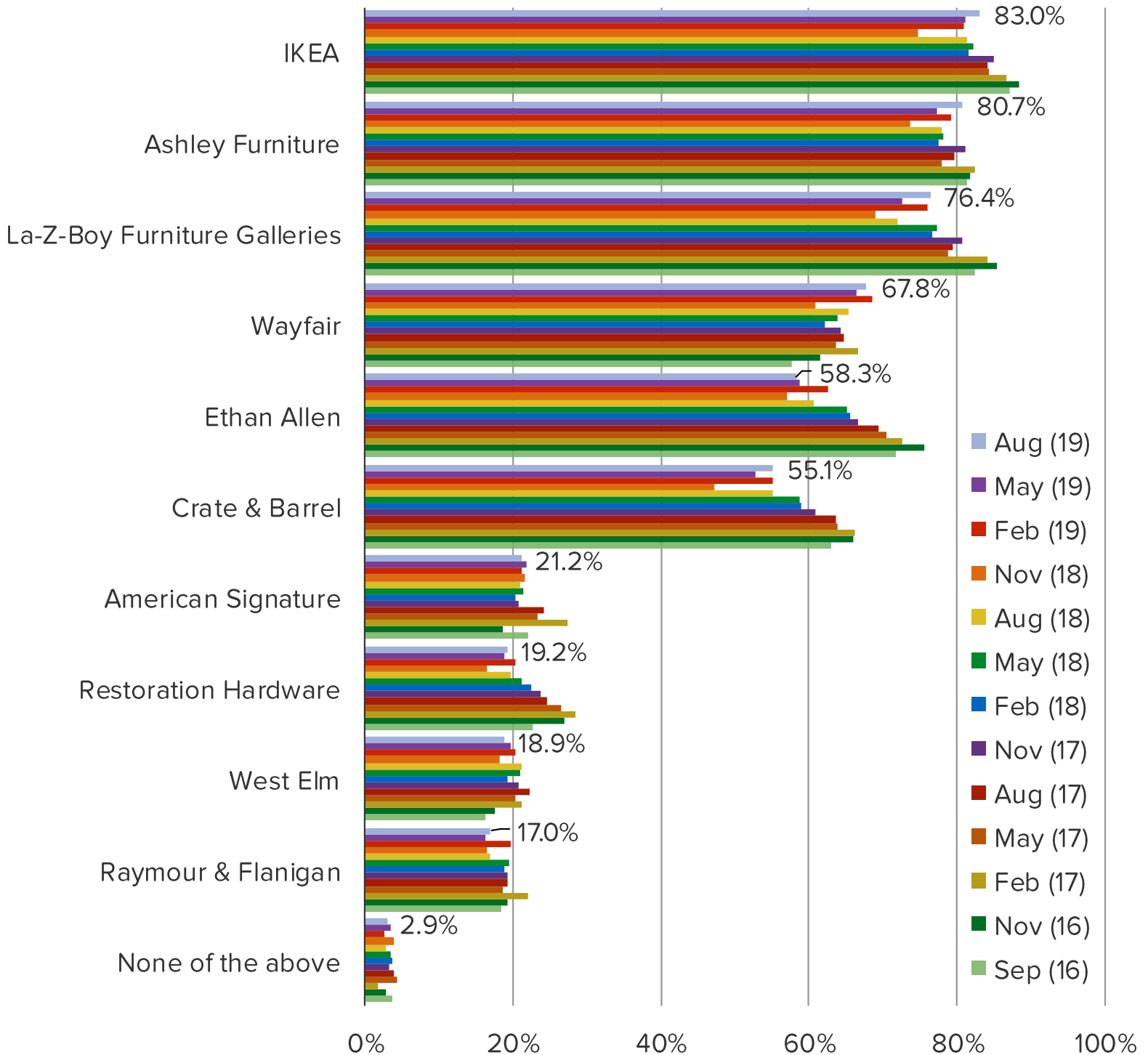
FAVORITE FURNITURE BRAND (FILL-IN QUESTION)

Posed to all respondents



AIDED AWARENESS

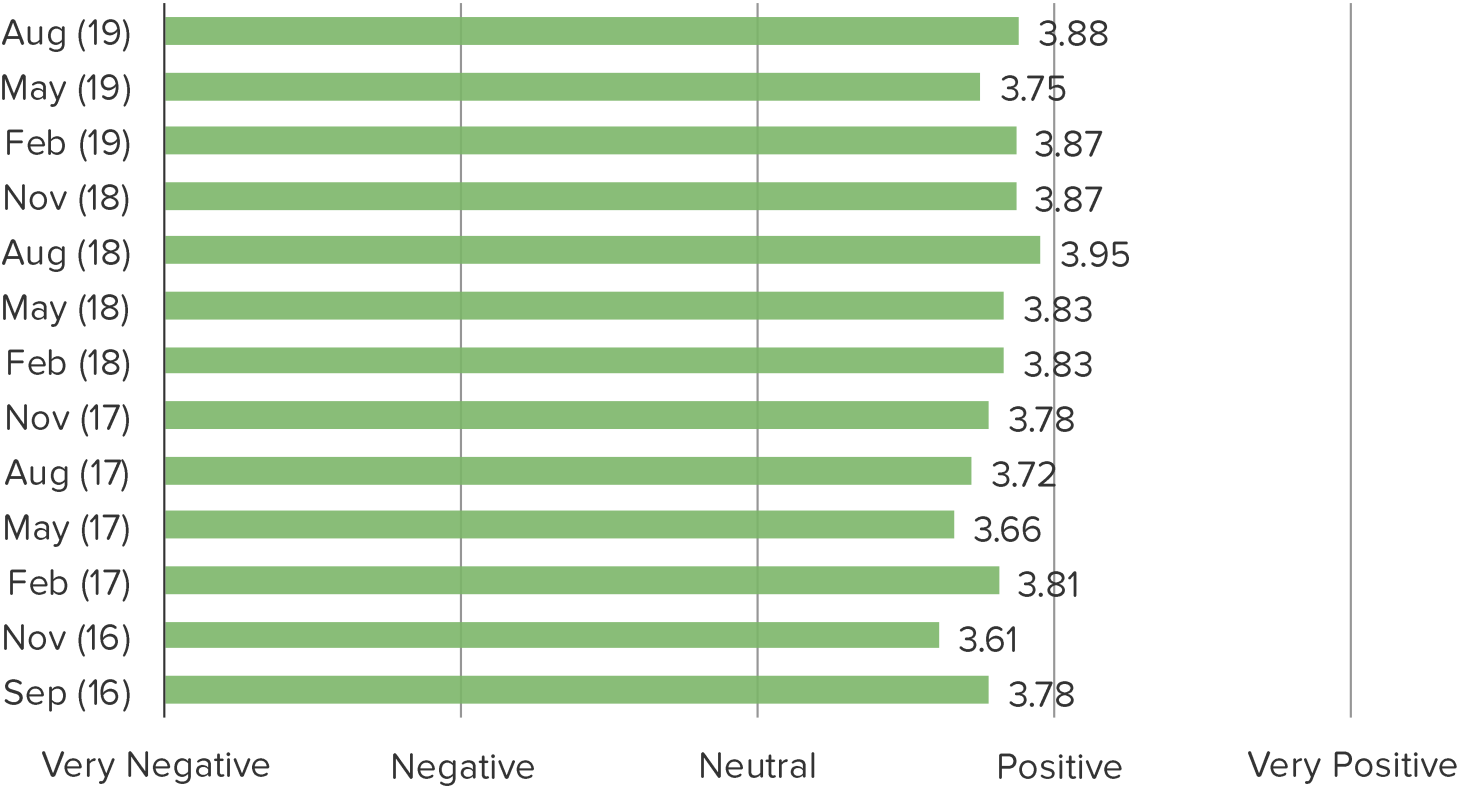
Posed to all respondents



RESTORATION HARDWARE

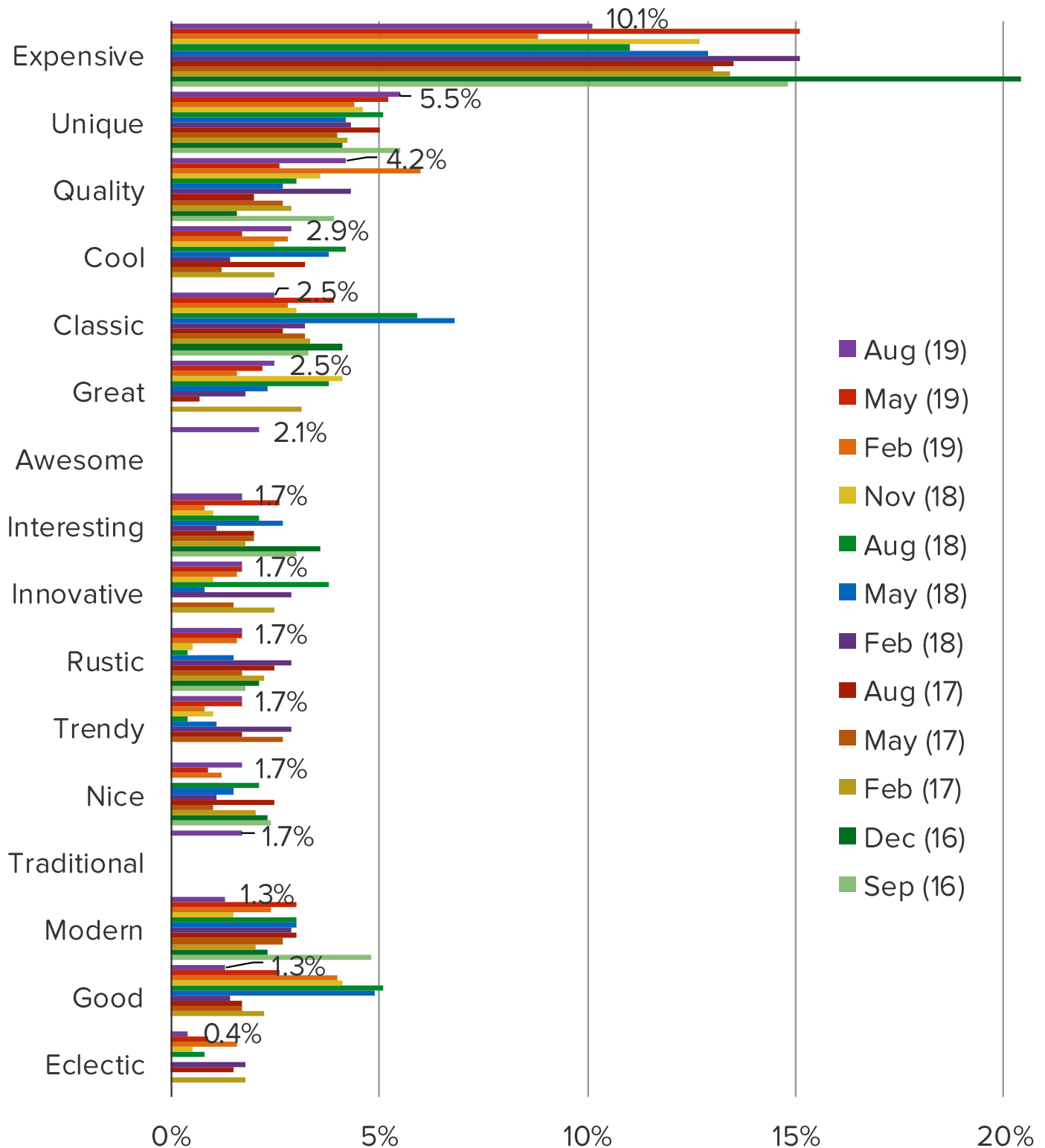
OPINION OF RESTORATION HARDWARE

Posed to all respondents who are aware of Restoration Hardware



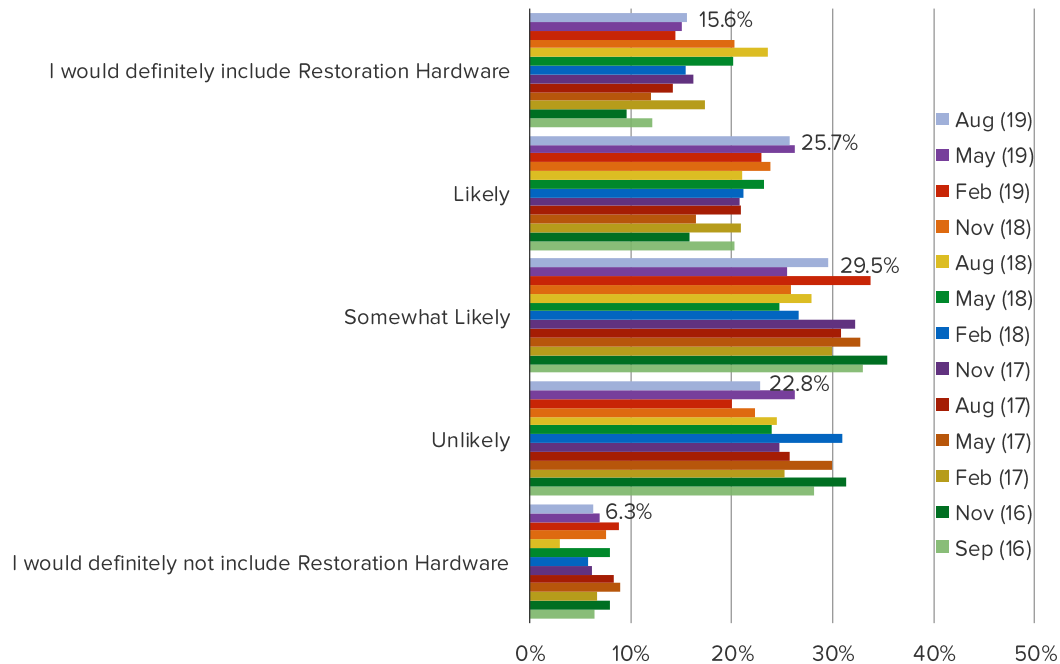
ONE WORD TO DESCRIBE RESTORATION HARDWARE (FILL-IN QUESTION)

Posed to all respondents who are aware of Restoration Hardware

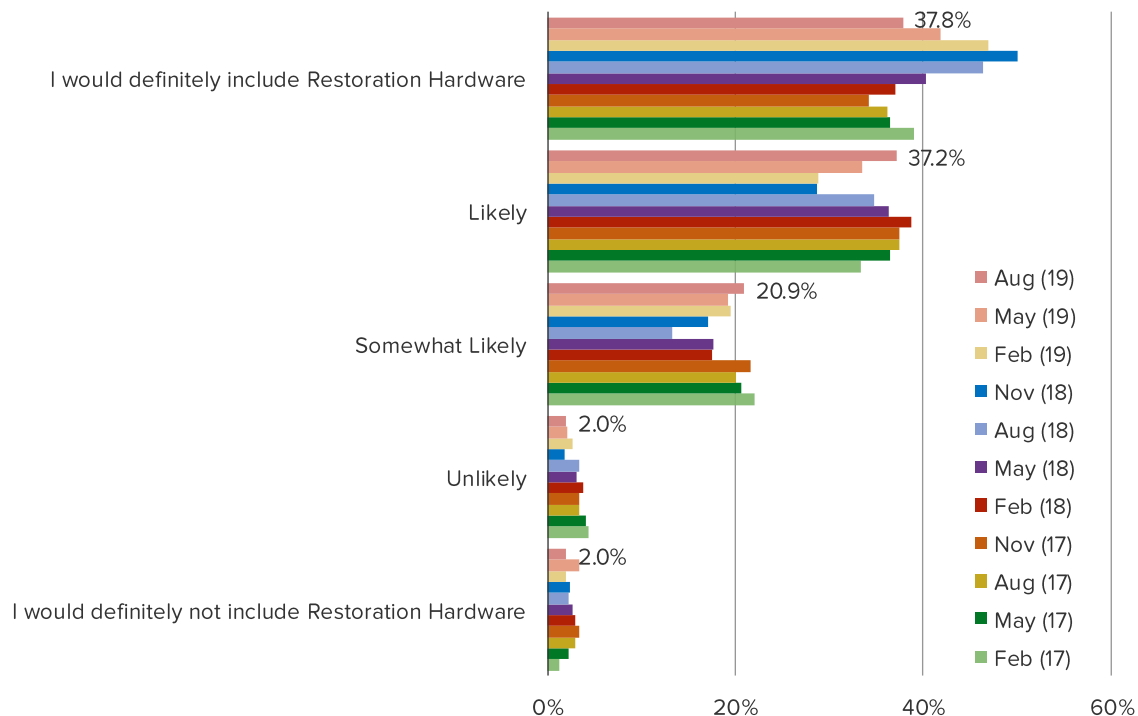


IF YOU WERE BUYING FURNITURE TODAY, HOW LIKELY WOULD YOU BE TO INCLUDE RESTORATION HARDWARE IN YOUR SEARCH?

Posed to all respondents who are aware of Restoration Hardware

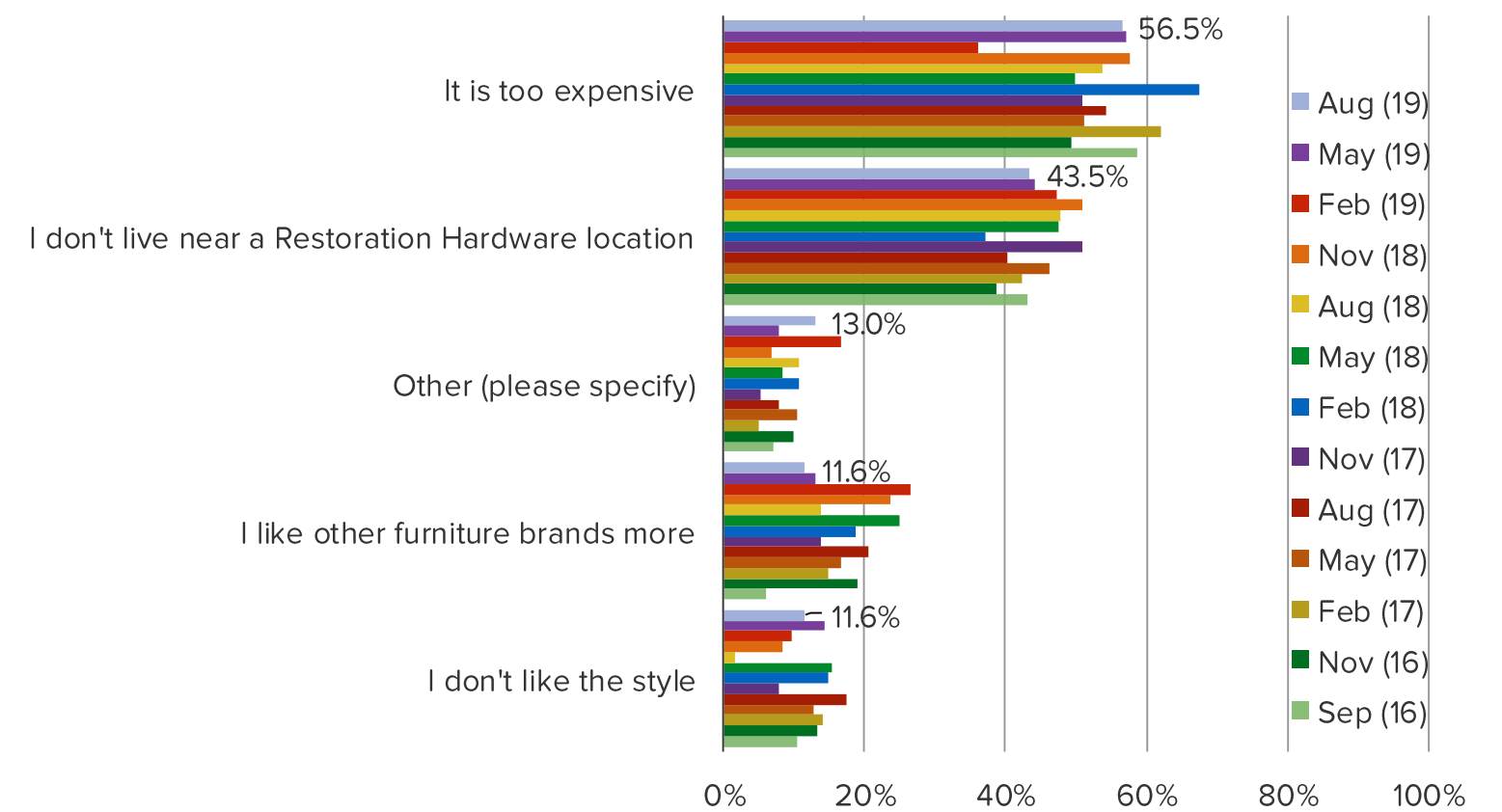


RESPONDENTS WHO OWN ONE OR MORE ITEMS FROM RESTORATION HARDWARE (THE CHART BELOW IS A THREE QUARTER MOVING AVERAGE)



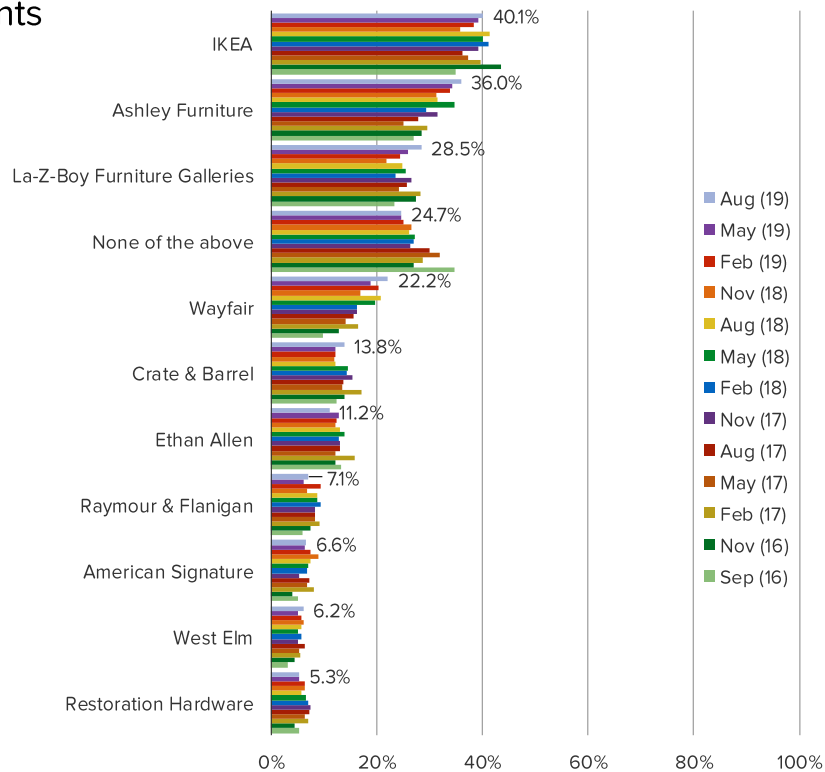
WHY WOULD YOU NOT INCLUDE RESTORATION HARDWARE?

Posed to all respondents who are aware of Restoration Hardware but would not include Restoration Hardware in their furniture search

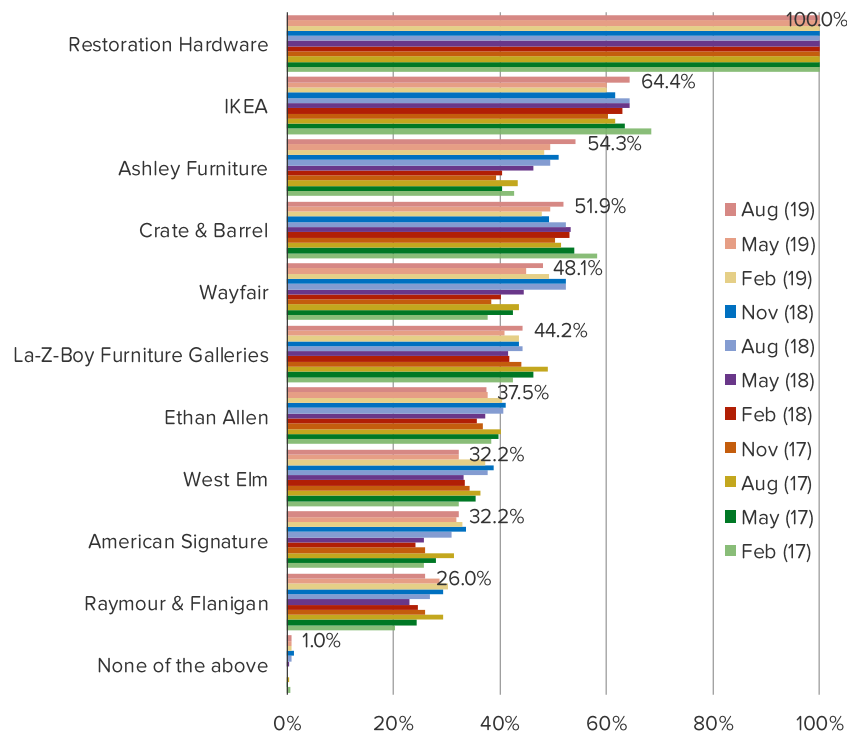


WHICH OF THE FOLLOWING DO YOU OWN FURNITURE FROM?

Posed to all respondents

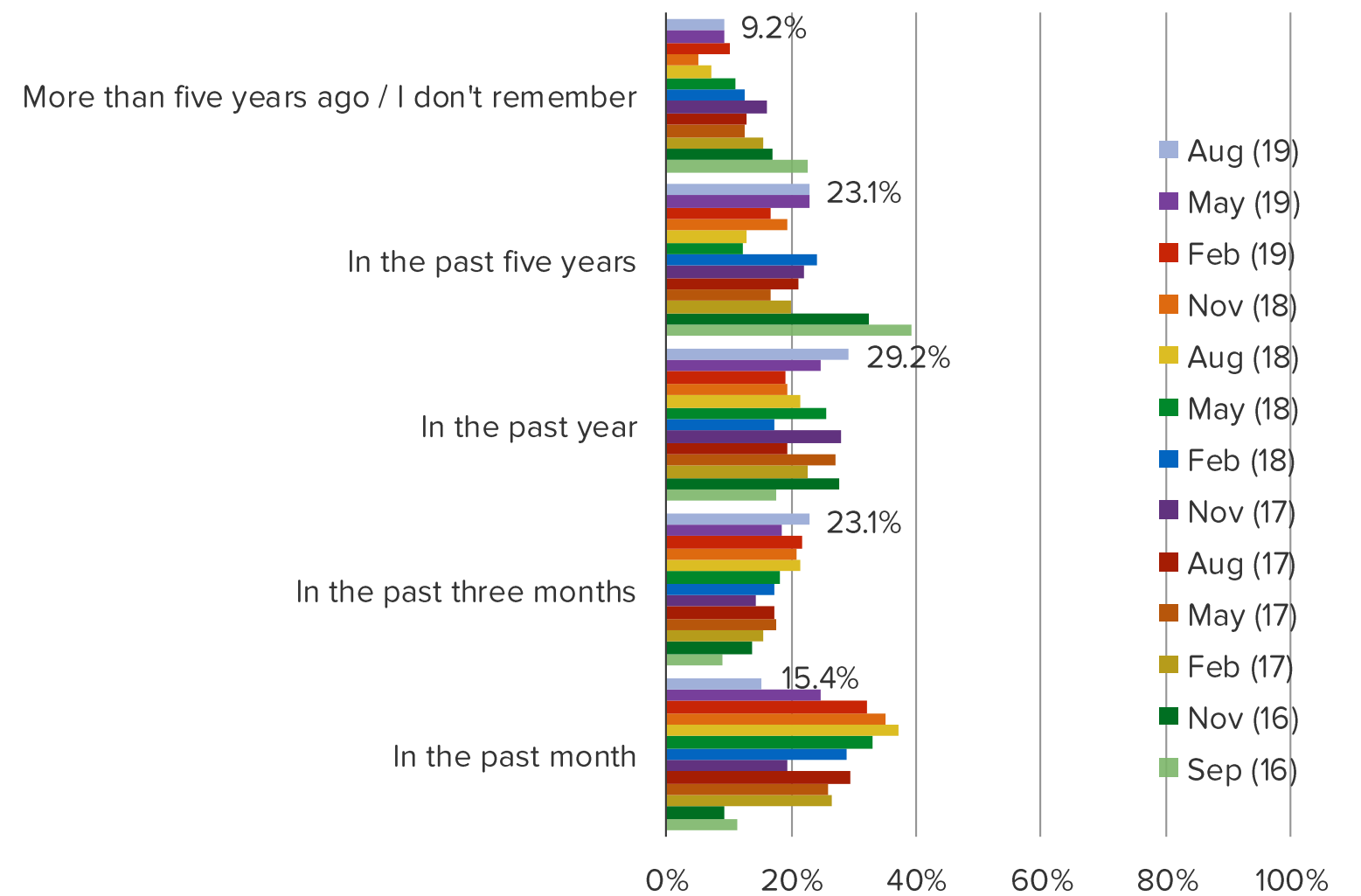


RESPONDENTS WHO OWN ONE OR MORE ITEMS FROM RESTORATION HARDWARE (THE CHART BELOW IS A THREE QUARTER MOVING AVERAGE)



WHEN THEY MOST RECENTLY PURCHASED ITEMS FROM RESTORATION HARDWARE

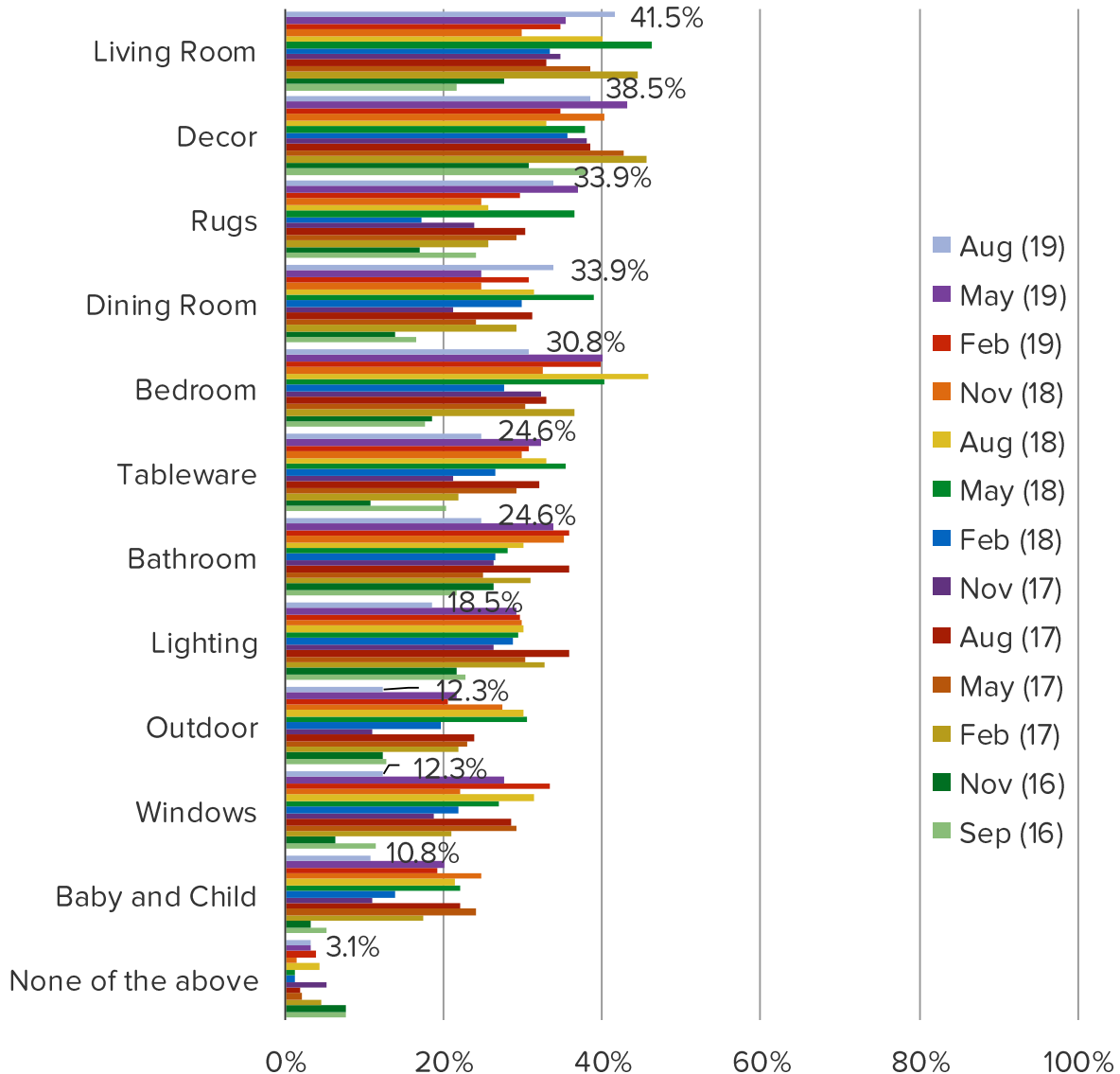
Posed to respondents who own item(s) from Restoration Hardware. Please note the n for this question ranges from 65-120 respondents, so survey error range may be higher for the chart below.



N = 65 in Aug (19)

THINKING ABOUT YOUR MOST RECENT PURCHASE FROM RESTORATION HARDWARE, WHAT DID YOU BUY?

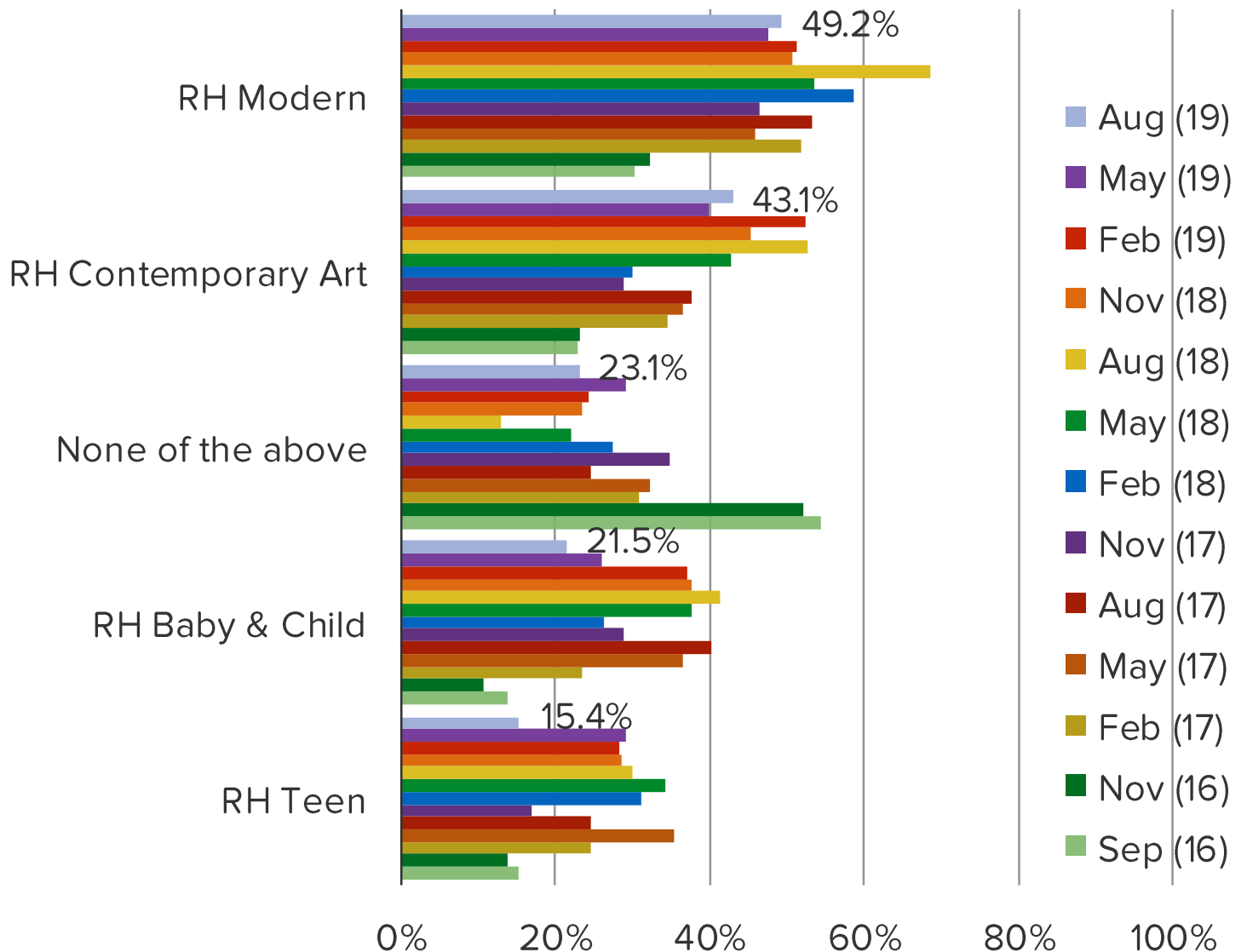
Posed to respondents who own item(s) from Restoration Hardware



N = 65 in Aug (19)

HAVE THEY EVER PURCHASED ITEMS FROM ANY OF THE FOLLOWING DEPARTMENTS WITHIN RESTORATION HARDWARE?

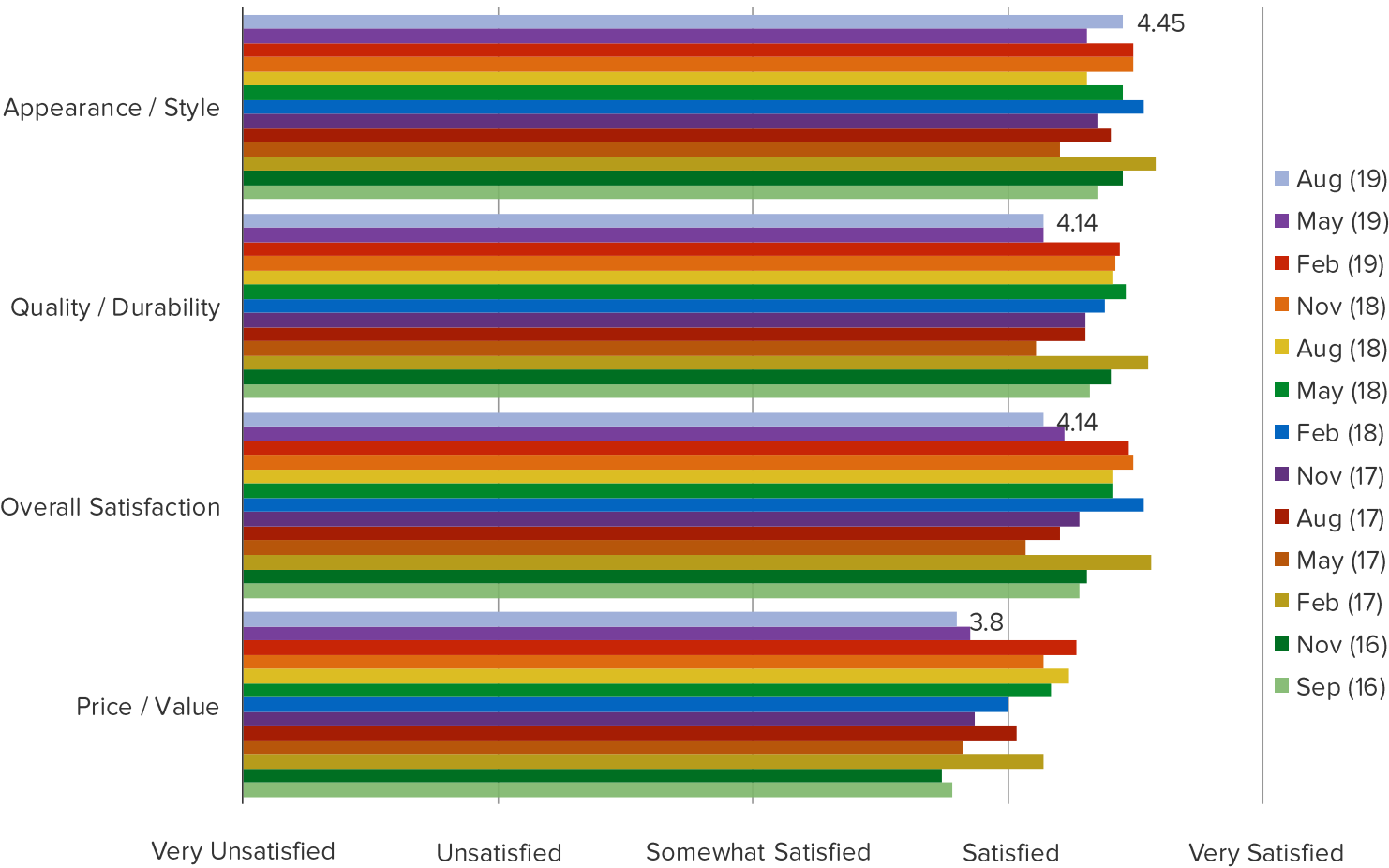
Posed to respondents who own item(s) from Restoration Hardware



N = 65 in Aug (19)

SATISFACTION WITH THE RESTORATION HARDWARE ITEMS THAT THEY OWN

Posed to respondents who own item(s) from Restoration Hardware

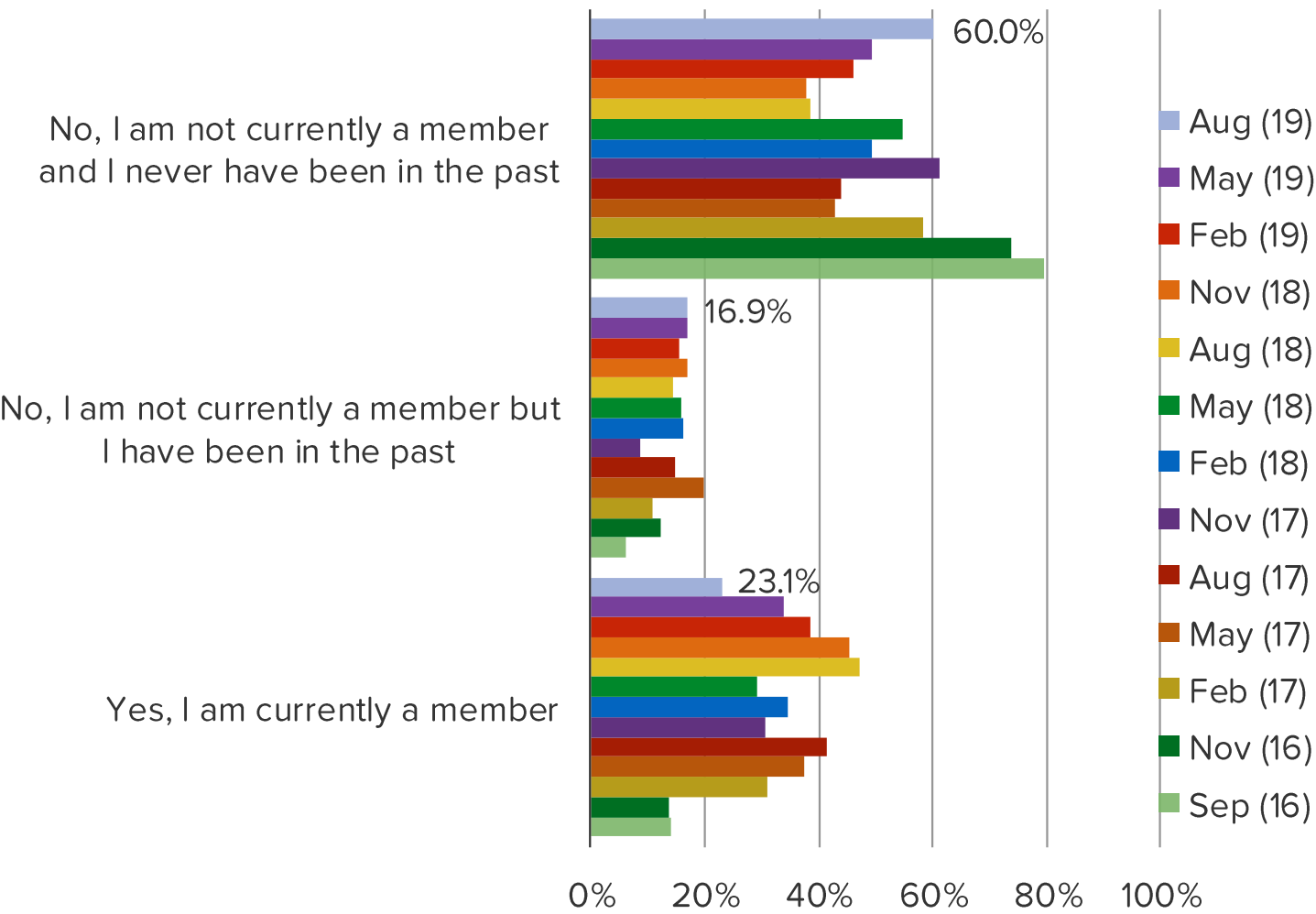


N = 65 in Aug (19)

GREY CARD PROGRAM

RESTORATION HARDWARE GREY CARD PROGRAM MEMBERS

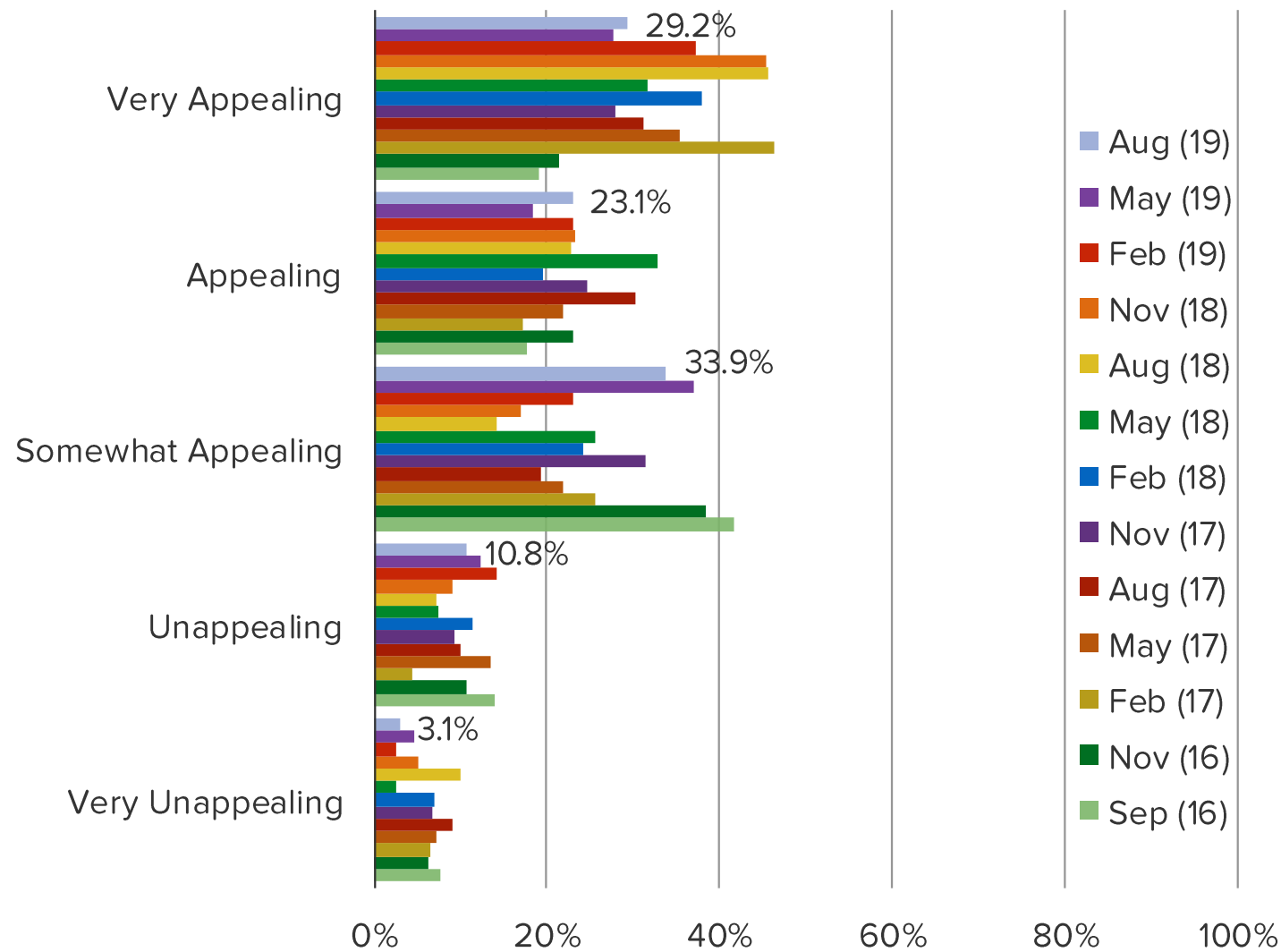
Posed to respondents who own item(s) from Restoration Hardware



N = 65 in Aug (19)

DO YOU FIND THE GREY CARD PROGRAM TO BE APPEALING? (RESPONDENTS WERE SHOWN A GRAPHIC FROM THE RH WEBSITE EXPLAINING THE PROGRAM)

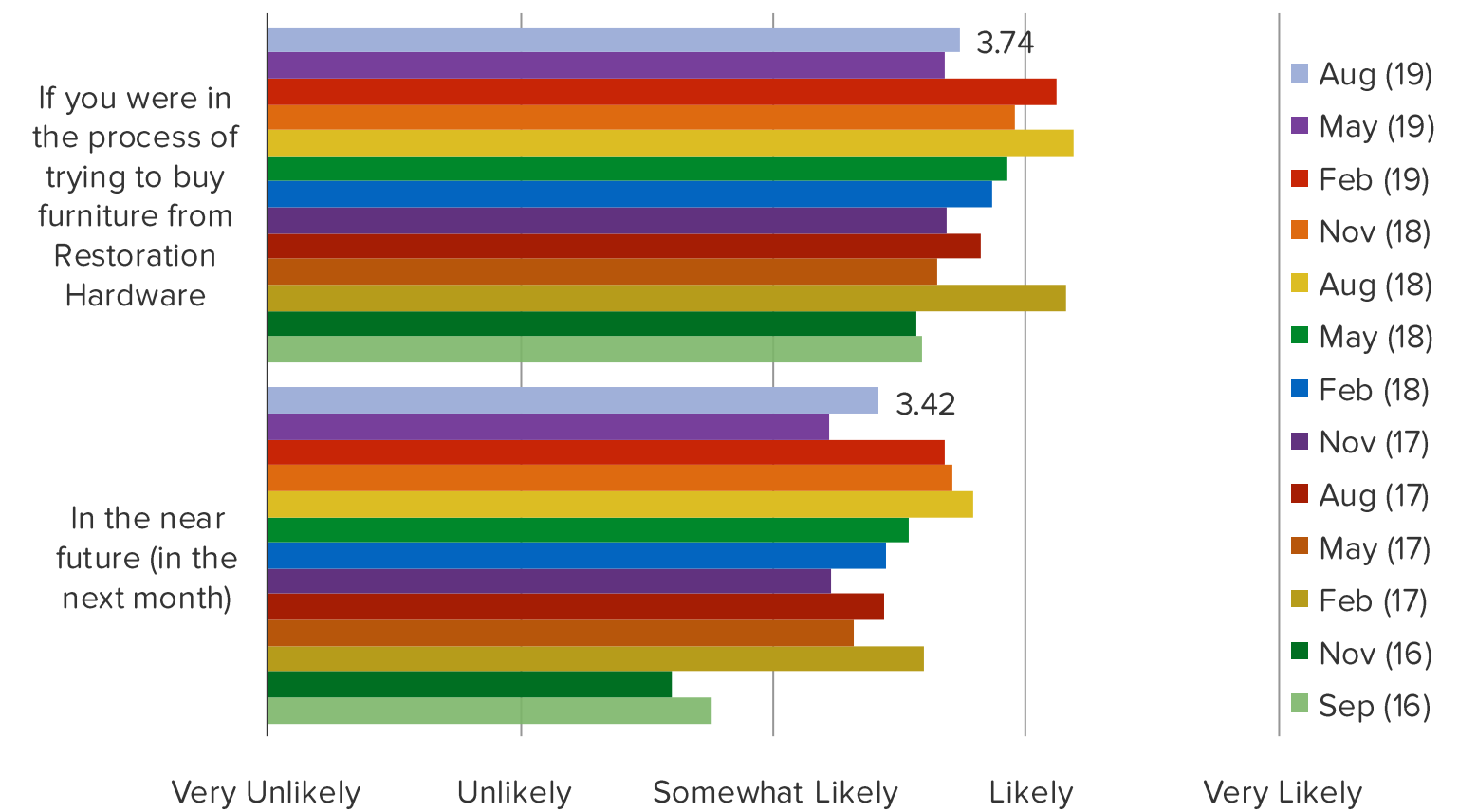
Posed to respondents who own item(s) from Restoration Hardware



N = 65 in Aug (19)

LIKELIHOOD OF SIGNING UP FOR THE PROGRAM IN THE FUTURE

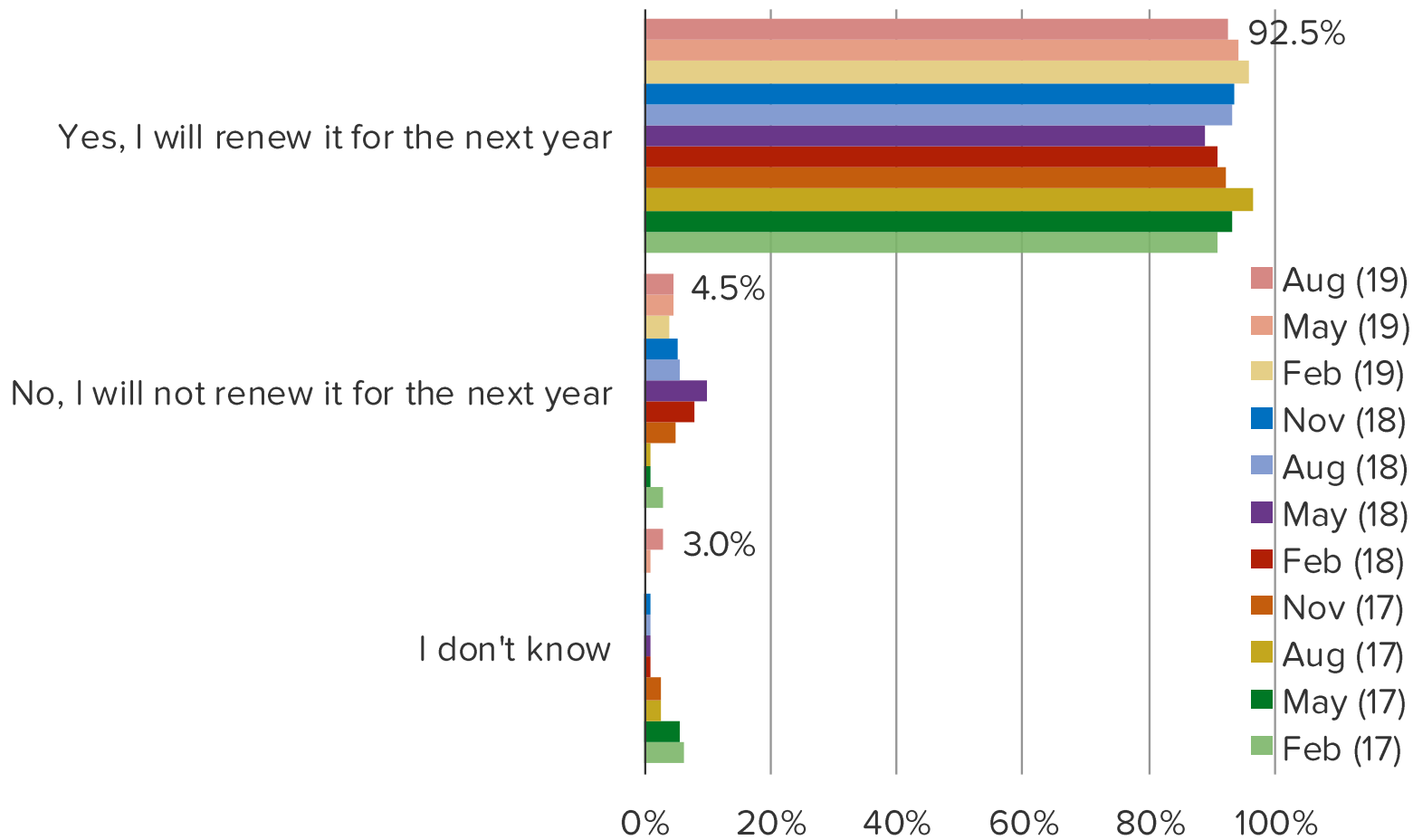
Posed to respondents who own item(s) from Restoration Hardware



N = 65 in Aug (19)

LIKELIHOOD OF RENEWING GREY CARD SUBSCRIPTION

Posed to respondents who are members of RH’s Grey Card Program



N = 67 Across The Past Three Survey Volumes