

BESPOKE SURVEYS

## Mattresses and Furniture Vol 24

1250+ Consumers Per Wave



## CHECK BREAKDOWN:

### FURNITURE TRENDS

Trends related to moving/buying a home improved a touch q/q but are off series highs. Intentions to renovate or remodel improved q/q and sits at series highs. Preferences to buy furniture online has grown over the history of our survey but has pulled back some sequentially in recent quarters.

### LUXURY FURNITURE DEMAND

According to respondents, interest in luxury furniture is net weaker than it typically would be at the moment – but among respondents with higher incomes, interest is net stronger than normal. Among respondents who say interest is stronger than normal – many flag that they either have more money now, that they like higher quality furniture, or that they recently moved and/or were needing to remodel. Respondents who said their interest is weaker than normal either can't afford it in general or don't buy luxury furniture in general, or they flagged things like inflation and the economy.

### FURNITURE BRANDS

With regard to furniture brands, Arhaus sticks out as a brand that had the most positive sentiment toward it among consumers who are familiar.

### MATTRESS PURCHASE ACTIVITY:

The share of respondents who purchased a mattress within the last three months improved q/q.

### MEMORY FOAM VS HYBRID

Memory foam and inner spring mattresses continue to hold the lead over hybrid mattresses. Over time, inner spring mattresses have lost share.

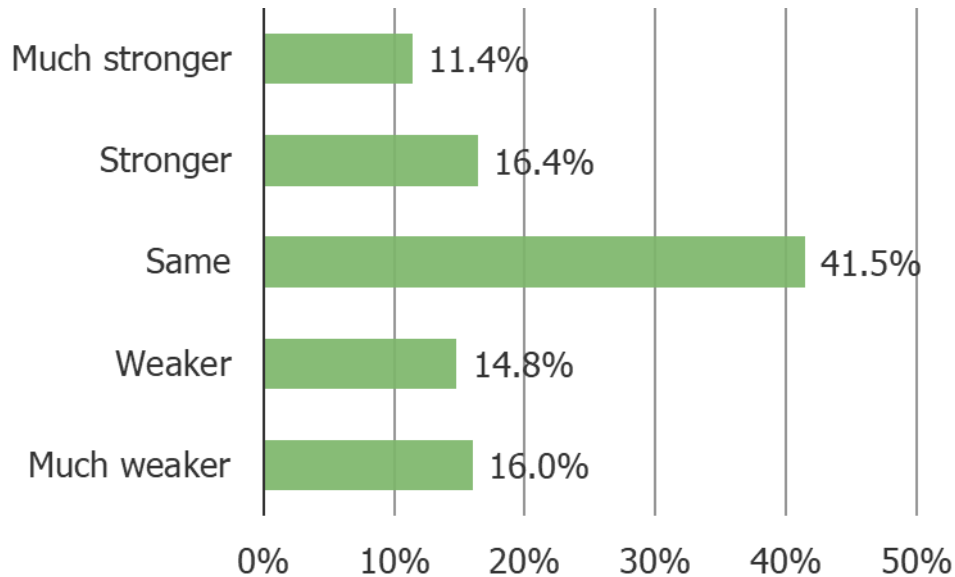
### ONLINE MATTRESSES

The share of respondents who have ever ordered an online mattress increased q/q and is tracking near series highs. Though online share gains have flattened somewhat in the last several quarters, sentiment toward online is positive and has improved markedly over the history of our survey.

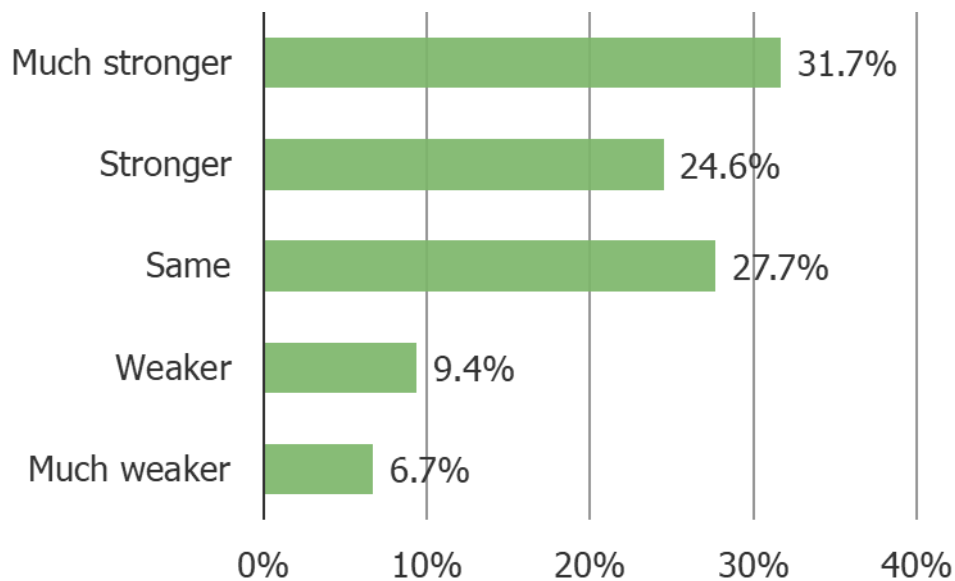
## NEW QUESTIONS THIS QUARTER

WOULD YOU SAY YOUR INTEREST IN BUYING LUXURY FURNITURE THIS YEAR IS STRONGER/WEAKER THAN WHAT IT TYPICALLY WOULD BE?

Posed to all respondents



Posed to respondents with household incomes of \$100k and above (N = 224)



RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **HIGHER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is higher than normal.

- Because we are in need of furniture because we gave alot away to our children
- Because all my furniture is old and I would like new furniture
- Because I am moving out soon
- Because I am willing to beautify my home
- Because I am working from home
- because i have a good fill about it
- because I have more money to spend on luxury furniture
- because I have waited for a sale and didn't want to attempt visiting a store during Covid.Now I really want a recliner.
- Because I like it
- Because I like it a lot more and the quality
- Because I look to see good furnitures
- Because I m determine to fix my house.
- Because i need it
- Because I need some!!
- Because I need them more
- Because I remodeled my home.
- Because I want to change the look in my home
- Because I want to decorate my own house
- Because I want to get new furniture for my home
- Because I want to make home nice
- because i wanta strong furniture which will take mmore time
- because im gonna settle into a more permanent living situation
- Because I'm interested in changing to something trendy
- Because I'm so ready to get everything together in my new home.
- Because income has increased
- Because is very relevant to me
- Because it has better wood and plástic
- Because it is better quality
- Because it is convenient for me
- Because it's a goal
- Because it's more beautiful
- because my life has changed
- Because new things
- Because of the fact that luxurious items seems to be on the increase as if lately
- Because quality important technology
- Because the better quality the better of I'll be
- Because the pricing are moderate relative to the quality.
- Because they're the best for my home
- Because variety is the spice of life
- Because we are expecting a new house
- Beauss I like it
- being ready to get things done
- best choice
- Better and lasts longer

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **HIGHER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is higher than normal.

better quality  
 better selection  
 Boredom with the look of the home after spending so much time at home  
 Cause of safeness and the number of people who have been trying to use  
 Chair  
 Cheaper than usual  
 comfortable  
 Cooler things coming out  
 Covid  
 Durability  
 Everything is good  
 Everything is good  
 Furniture getting older  
 Furniture needs to be new and clean  
 good quality  
 Has attractive design  
 High quality  
 I am looking to replace my bed  
 I am more interested in taking care of my home  
 I appreciate furniture better now  
 I feel as it is time for new good furniture  
 I feel like I'm way more interested in being stylish and having my house look good.  
 I have been looking and I like what I've seen  
 I have more room  
 I haven't been able to shop as I please so mu next furniture purchase has to be huge.  
 I in need of it  
 I just feel like I'm older and need new furniture  
 I just moved into a new home, so I want e befitting furniture.  
 I just want it to be different  
 I like it  
 I like them  
 I like to decorate  
 I love good and fashionable furniture  
 I love it so much and I love it so much  
 i love luxury furniture  
 I love the style and design of the products  
 I make more money now than last year.  
 I need something that would last  
 I need to  
 I really need new furniture > I had my furniture for awhile now .  
 I spend a lot more time at home dye to covid.  
 I think it will last longer than the normals. I really like something like that.  
 I want a luxuries furniture for house to add a new look and feel to my house.  
 I want better for myself.  
 I want it more now

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **HIGHER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is higher than normal.

- I want my home to look more stylish and modern
- I want my house to look more appealing
- I want something that is more durable
- I want that comfortable and southern home living furniture for my home
- I want to do more and get what I really want.
- I want to expand my horizon
- I want to have nice things before my time is up and I feel it's now or never
- I want to invest in higher quality products
- I want to make my home look more stylish
- I want to redecorate my home
- I want to refurbish my informal living room.
- i want to treat myself
- I will move to New hausa
- I won't to stuck it up most especially
- I'm finally about to have my own place so I gotta pimp it out.
- I'm getting excited to buy some furniture
- I'm kind of interested in new furniture that's on sale.
- I'm looking for a specific item
- I'm not really sure
- I'm anxious to buy for a new house
- I'm at home more.
- I'm looking to redecorate the place
- I'm more passionate now
- I'm now have a strong taste for luxury furniture
- I'm tired of my drab old furniture
- In a recent move, all luxury furniture came from the previous house. I now need new ones.
- In need of a new bed
- Increase salary
- Influx of money
- It a hood and quality
- It is something I need
- It is unique
- It is unique
- it lasts longer
- It lasts longer.
- It's amazing
- It's better for us
- It's interesting
- It's interesting
- It's new and different
- It's something I like
- It's basically the best in all area
- it's cool to me.
- it's easy

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **HIGHER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is higher than normal.

It's how I feel  
 It's just much more creative  
 its nice to have good furniture  
 Ive seen more options over time  
 I've waited a long time.  
 just because it is different  
 Just looking  
 Just want to fresh up my living room with more up to date furniture. A little change won't hurt nobody  
 Like a change  
 like nicer things  
 Like to keep the value  
 Living room furniture  
 More expensive  
 more income  
 More income.  
 More money  
 More money  
 More money in my pocket  
 MORE SALES  
 More time  
 My apartment complex has undergone 123,000,000 in renovations and it's just time!  
 my furniture is getting old and peeling  
 My thoughts  
 Need a new sofa!! Urgently!!  
 Need new one  
 need new stuff  
 Need something different  
 Need to replace bedroom set  
 need to replace current furniture  
 New  
 New empty house  
 Nicer home  
 Positive online review  
 Price  
 Price  
 Quality  
 Quality  
 Quality  
 Quality  
 Quality furniture  
 Quality good  
 Recent wedding  
 Reliable  
 Reliable service



RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **HIGHER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is higher than normal.

Reliably  
 Safety of my family  
 Search coronavirus we spend more time in the house  
 See alot of nice deals  
 Since remodeling I want more modern furniture  
 So it lasts a long time  
 So the material won't rip fast or break  
 So, that it last longer.  
 Some older items are looking their age  
 Something different  
 Spending more money  
 Style and longevity  
 That'll be as am now older and life s short  
 The are very attractive  
 The style  
 The world has advanced  
 there are a lot more deals on online stores  
 They are extremely good and perfect  
 They are great  
 They are more fashionable  
 They are nice  
 They are of good quality  
 They look good  
 They look nice  
 This is because I need for furnitures for my home as its increasing  
 Time to change it up.  
 Time to replace old living room set  
 Tired of the cheap stuff that doesn't look as good and breaks easier.  
 To do full renovation at home  
 To make my home more better  
 To make my house beautiful  
 To refresh my home  
 Very appealing and of a great deal  
 Very good quality  
 Very strong  
 Virus is under control  
 want a change and quality  
 Want something to last  
 Want to Change my house look  
 we are expecting a baby  
 We are in need of a leather chair.  
 We need a new chair  
 When I replace pieces I have learned that you usually get what you pay for. I mean good quality furniture usually lasts longer  
 and performs better than cheap furniture.  
 yes i like so mach it's rally good  
 Yes it is stronger because we're in 2022

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **LOWER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Not interested  
 8 % inflation  
 A conferrer  
 Afraid inflation will effect our budget.  
 Because I am not buying right now.  
 Because I been having to focus my money better and balance my money  
 Because I don't buy it at all  
 Because I don't buy luxury furniture  
 Because I worry about running out of money.  
 Because I'm not that movivated  
 Because I'm broker than n0rmal.  
 Because it just it  
 Because it seems it will be less price  
 Because it's too expensive and not at all worth the price.  
 Because of finances  
 Because of inflation  
 because of inflation  
 Because of inflation  
 Because of inflation, the prices are higher than previous.  
 because of the inflation rate  
 Because of the issues with rising cost and inflation  
 Because of the pandemic and job situation  
 because prices keep rising  
 because that furniture is way too expensive  
 because the economy is getting worse, and there is a delay in getting furniture  
 Broke  
 Budget  
 Can't afford  
 cannot afford luxury furniture  
 Cannot afford to buy it!  
 Can't afford  
 cant afford it  
 Can't afford it  
 Can't afford luxury  
 Can't afford the cost  
 Cheap stuff last just as long  
 cost  
 Cost  
 cost  
 Cost of living  
 Cost of products, value for price paid  
 cost too much  
 Covid  
 Covid pandemic

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS LOWER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Covid why else

do not have that type of money to spend

do not need

do not need any

do not need furniture

DO NOT NEED LUXURY FURNITURE

Do not purchase luxury furniture anyway. Not interested.

Do to the rise in prices of everyday needs

Doing poor financially

Don't feel like it

Don't need it right now

don't have a need for any furniture

Don't have money, inflation is too high right now

dont know why

Don't need luxury

Don't need luxury furniture

don't need luxury furniture. Need something comfortable

don't need sany furniture

Due to the economy, Covid and the cost of luxury

Due to the inflation and the gas prices, we are on a very strict budget at this time.dget

Due to the pandemic and the current energy crisis money is tight you have to pare back on your spending

Economic conditions

Economy

Economy

Economy

economy

Economy and the gasoline prices

Economy is bad and I'm hurting for money

Everything is more expensive right now, and my family is in a difficult financial situation.

expense

Expensive

expensive

Extra cash is a thing of the past in this economy.

Finances

financial challenges

Financial concerns

financial issues

Financial reasons. Plus, I can find great, beautiful quality of furniture at a fair price opposed to buying "luxury furniture" that costs a fortune only because we are paying for the NAME.

Financial struggles

Financially

Financially I am not ready

Happy with the furniture we currently own

Hat3 to shop and don't feel quite saf3 yet

have what want

Higher cost

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS LOWER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Higher prices combined with less income.

higher prices less options

I love it

I already have

I am Happy with my current furniture

I am looking for cost effective options more than luxury furniture because everything costs more today as inflation continues to drive prices upward.

i am old

I am satisfied with what bought.

I am saving up for more important purchases

I bought all the furniture I will need for a while when I moved to my apartment last year

I can't afford it

I cannot afford luxury furniture

I can't afford luxury furniture.

I do not have the funds.

I do not need any luxury furniture. I am pleased with what I have now.

I do not need it at this time

i do not need luxury furniture

I DO NOT NEED LUXURY FURNITURE

I don't have the money..

I don't know

I don't know it just is

I don't buy luxury

I don't buy luxury furniture.

I don't care about having expensive furniture.

I don't care for luxury

I don't have a need for new furniture

I don't have any money

I don't have as much money and everything is getting more expensive

i don't know

I don't know

I dont like luxury furniture

I don't need any

I don't need any new furniture right now

I don't need it

i don't need luxury anything

I don't need new furniture

I don't see why I would buy luxury furniture at this stage of my life. I am downsizing!

I don't think I can afford them.it safer to stop buying anything at this time

I don't. Need any

I find regular furniture to fit the theme I am working on for my home.

I have less money

I have less money

I have no interest I want to get things I can afford

I have no interest in buying luxury furniture.

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS **LOWER** THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

I have no money

I have no money

I have no money to buy any kind of furniture

I have other need that out weigh furniture

I have to get the finest of things

I like basic furniture. We have cats.

I mostly am watching the economy to not overpay or place myself in debt. Am looking at the stores.

I need furniture that is practical and well made

I need to buy what I can afford

I now live alone and have quality furniture to last for many years

I prefer comfort over luxury, and price.

I realize that luxury doesn't matter.

I would say the brand

I'd rather buy affordable furniture than luxury because I have a child and pets.

I'm not for sure

I'm not interested in buying new furniture have different goals to achieve

ldk

ldk

Im broke

I'm more interested in buying vintage items.

I'm not interested in luxury furniture

I'm not interested in Luxury furniture.

I'm older , I don't have the need for new furniture

I'm poor

Inflation

Inflation

Inflation

inflation

inflation

Inflation

Inflation

inflation

inflation

Inflation

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Inflation

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS LOWER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Inflation and costs  
 Inflation and gas  
 Inflation and I'm not sure of how our economy will be  
 Inflation and long delays in manufacturing  
 Inflation and want a simpler life now  
 Inflation has made everything expensive.  
 Inflation highest prices  
 Inflation is an all time high now.  
 Inflation is too high  
 inflation, money is tight  
 It is expensive  
 It is just me and my pets. We are not excited about luxury furniture. Comfort is more important.  
 It is the economy. Prices are so high I need to cut way back on my spending  
 It just is  
 it may not fit into my budget or income  
 It will be to expensive because the inflation  
 It's expensive  
 It's better quality  
 It's for my apartment  
 It's not cost effective, as I am getting older o realize that durability is more important than luxury  
 It's not my style  
 Its not really worth the money, the quality isnot any better then big box stores  
 It's so expensive now  
 Its weaker because I can't afford the expense of high end  
 Just need something to sit on. Nothing Fancy!!!!  
 Just not my thing  
 Lack of income  
 lack of supplys  
 Length it takes to get  
 Less funds available  
 Less income  
 less income  
 Less income  
 less income higher prices  
 Less money  
 Less money  
 Less money having to save for it  
 less money to spend  
 Less money to spend  
 Less product  
 Low finances  
 lower budget.  
 Luxury  
 Luxury furniture is too costly  
 money  
 Money

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS LOWER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Money  
 Money  
 Money  
 Money and pandemic fallout.  
 money is tight  
 Money problems  
 MORE EXPENSIVE  
 More important things to spend money on  
 My budget is tight right now  
 My budget is very tight.  
 My finances are severely limited at the moment.  
 Never buy luxury anything.  
 no funds on hand  
 no money  
 no money  
 No money  
 No money  
 No money  
 No money to spend on this  
 No money... Reduction of income  
 no need  
 No need  
 no need and too expensive  
 No need for it  
 No reason  
 no supplys  
 none  
 None  
 None  
 None  
 None  
 None  
 none dont need any  
 Not a good time to spend money.  
 Not arriving for months when ordered  
 not enough money  
 Not enough money  
 Not enough money this year  
 not interested in buying top of the line furniture  
 not interested in new furniture  
 not into luxury furniture  
 Not only do I have a need, if I did, it would be too costly.  
 Not really sure  
 not sure  
 Nothing

RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS LOWER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Nothing  
 Nothing  
 Nothing in particular  
 on a budget  
 only rich capitalist pigs have money for luxuries  
 Our budget is really tight because of inf. We don't have a lot of extra money  
 Pandemic  
 Price  
 Price  
 Price  
 Price  
 Price  
 price  
 Price  
 Price increases on many items...  
 Price is increased and it takes long time to have it  
 Price value  
 Prices  
 PRICES  
 prices  
 prices  
 Prices are high on necessities  
 prices are through the roof on everything  
 Prices are to high  
 prices are to high  
 prices going up  
 Prices have skyrocketed  
 Prices higher  
 Regular furniture would do  
 Reliable brand  
 Rising costs of goods  
 Rising inflation  
 Saving  
 The coronavirus pandemic has negative impact on my finances  
 The economy  
 The economy and inflation  
 The poor economy and uncertainty.  
 The prices  
 Their trying to save money  
 There are more important things that need to be taken care of and luxury furniture is not one of them.  
 they are not worth the money  
 they are too expensive.  
 too DAMN EXPENSIVE  
 too expensive  
 too expensive



RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS LOWER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is lower than normal.

Too expensive

Too expensive

too expensive

Too expensive

Too expensive

Too expensive

Too expensive

Too expensive

Too expensive

Too expensive specially now with the inflation

too expensive.

Trying to save more money these days

Uhm no reason

unemployed

Unemployed

Very Expensive

We are moving into the house I own and we want to remodel the structuring of the house before we decide on furniture.

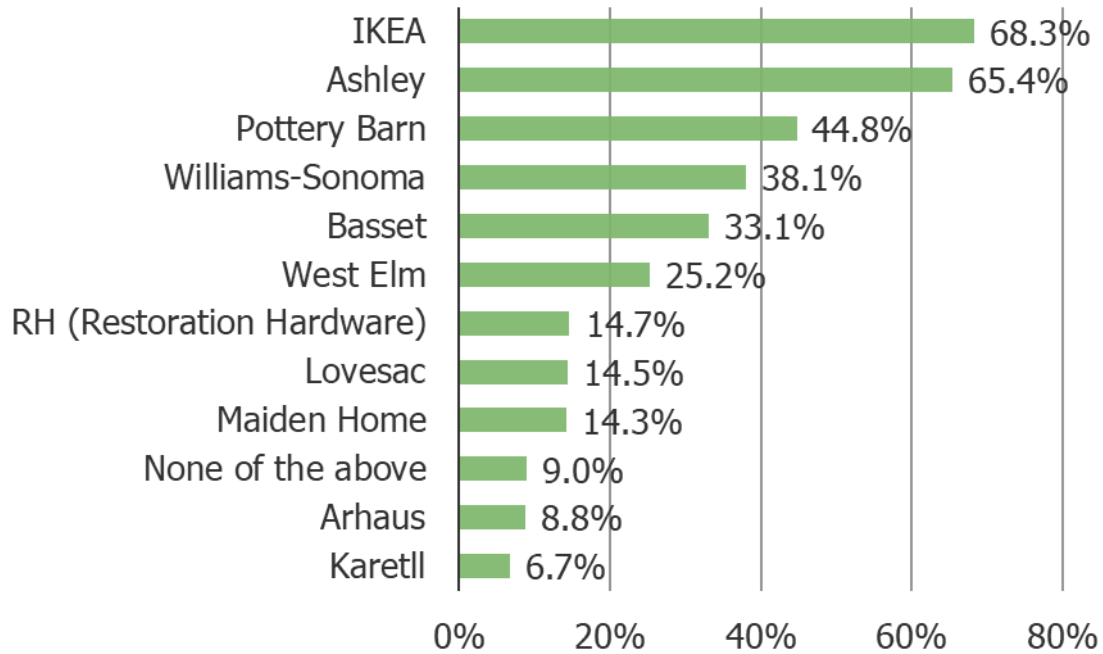
We don't need to buy any

We have all of the furniture we need right now. Does not need to be replaced.

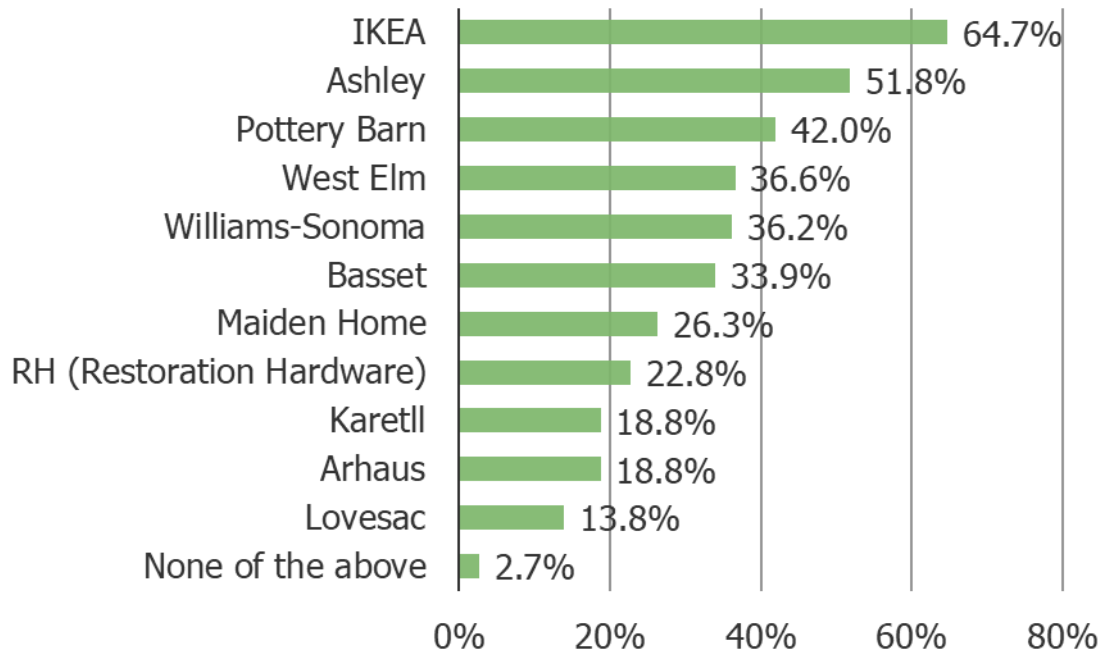
Well my interest in buying a luxury furniture this year weaker than normal because they don't have any good furniture and prices are higher

ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

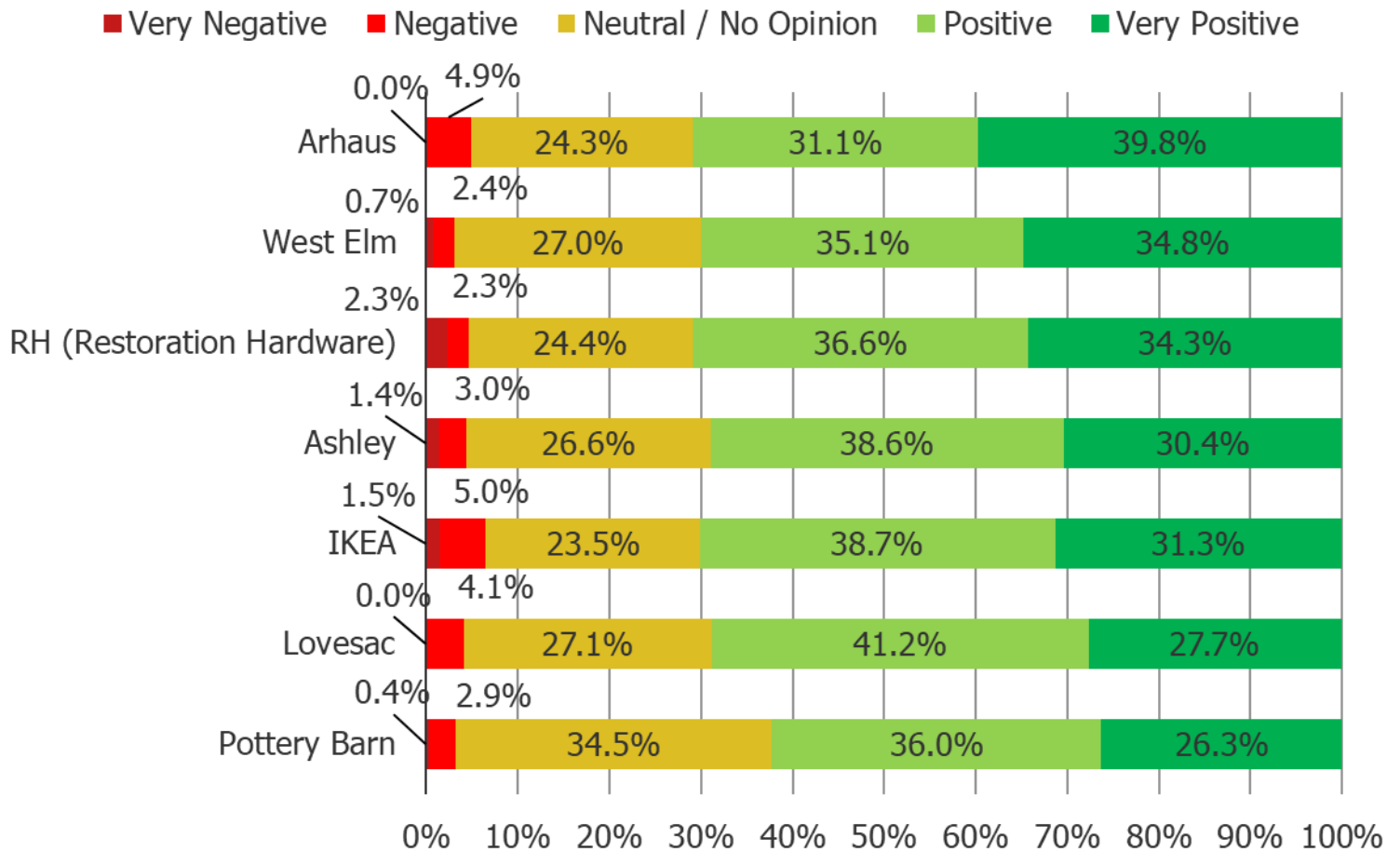


Posed to respondents with household incomes of \$100k and above (N = 224)



WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

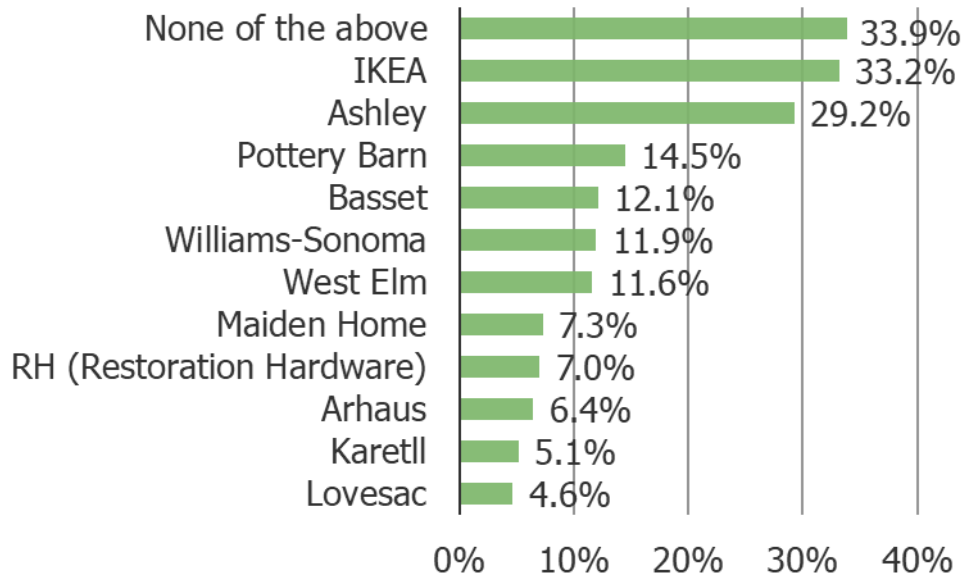
Posed to respondents who are familiar with each of the following.



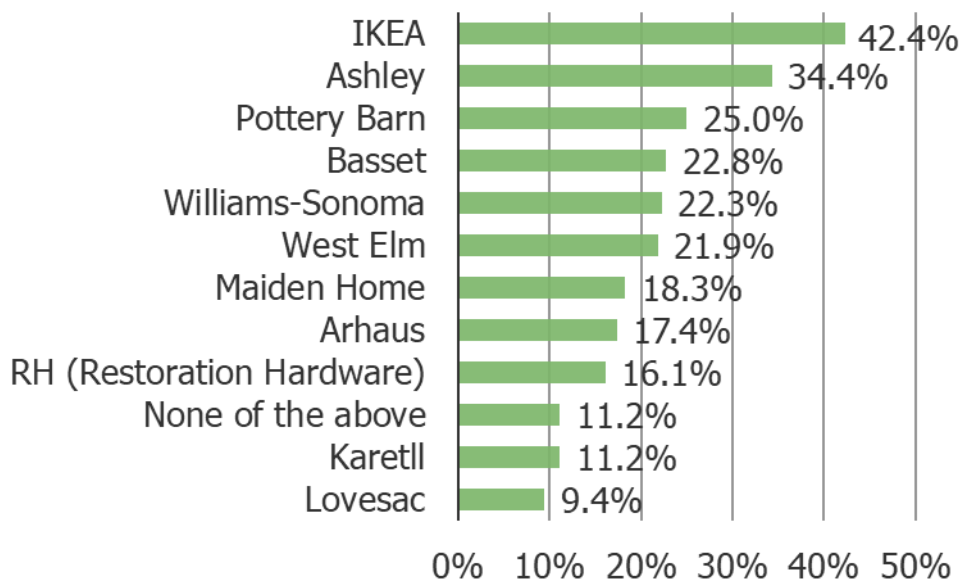
	N =
Pottery Barn	525
Lovesac	170
IKEA	801
Ashley	767
RH (Restoration Hardware)	172
West Elm	296
Arhaus	103

DO YOU OWN FURNITURE OR FURNISHINGS FROM ANY OF THE FOLLOWING BRANDS? (SELECT ALL THAT APPLY)

Posed to all respondents.

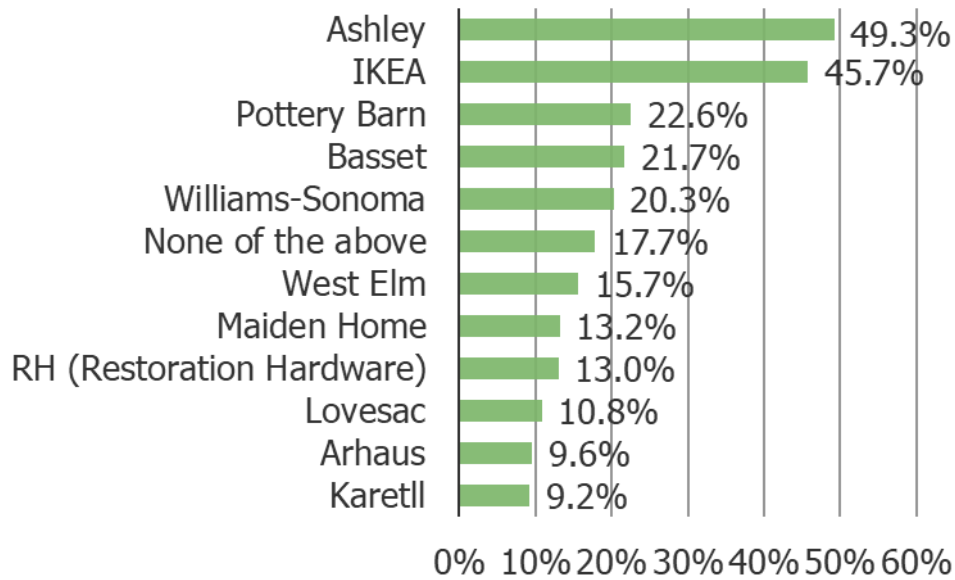


Posed to respondents with household incomes of \$100k and above (N = 224)

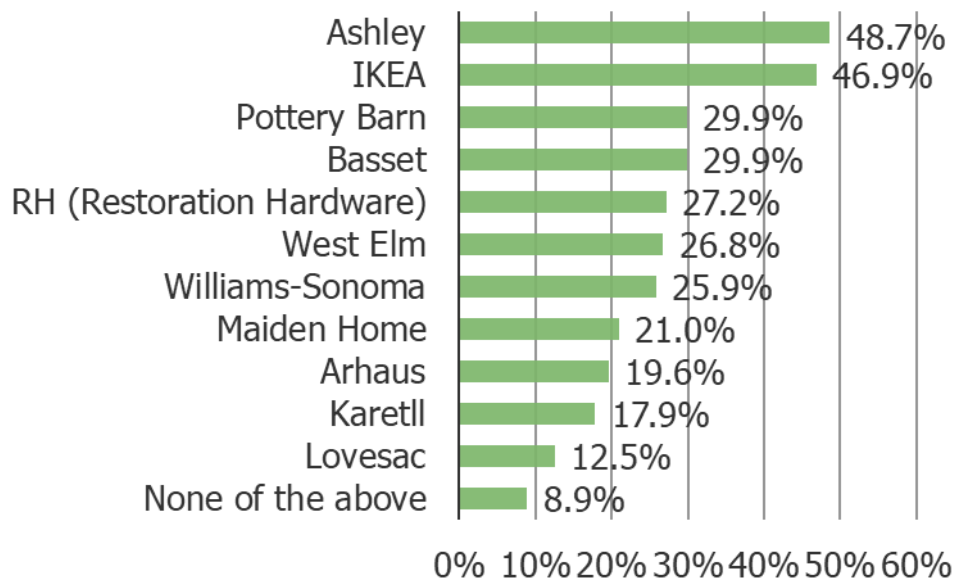


IF YOU WERE SHOPPING FOR FURNITURE TODAY, WOULD YOU INCLUDE ANY OF THE FOLLOWING IN YOUR SHOPPING PROCESS? (SELECT ALL THAT APPLY)

Posed to all respondents.



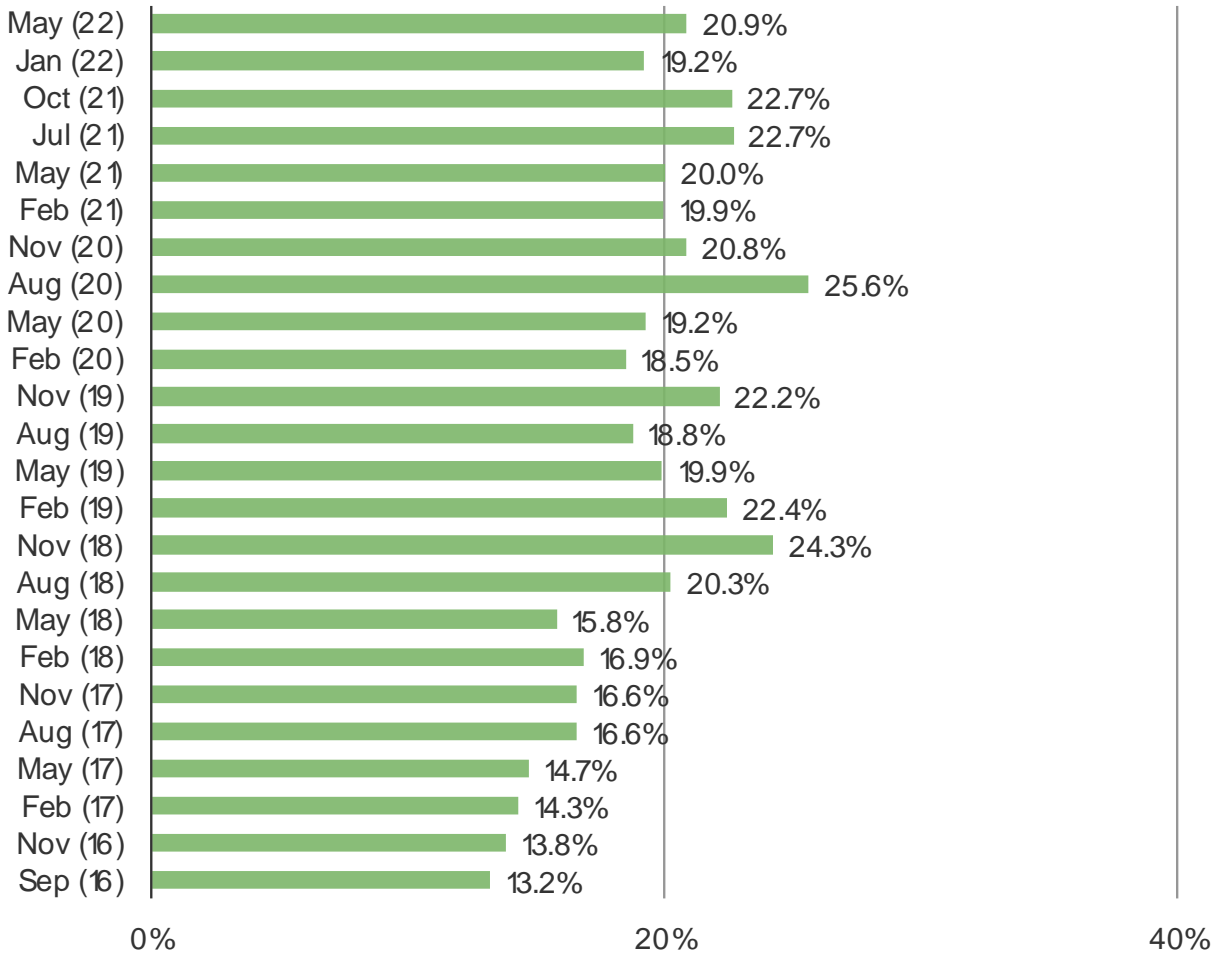
Posed to respondents with household incomes of \$100k and above (N = 224)



## FURNITURE PURCHASING TRENDS

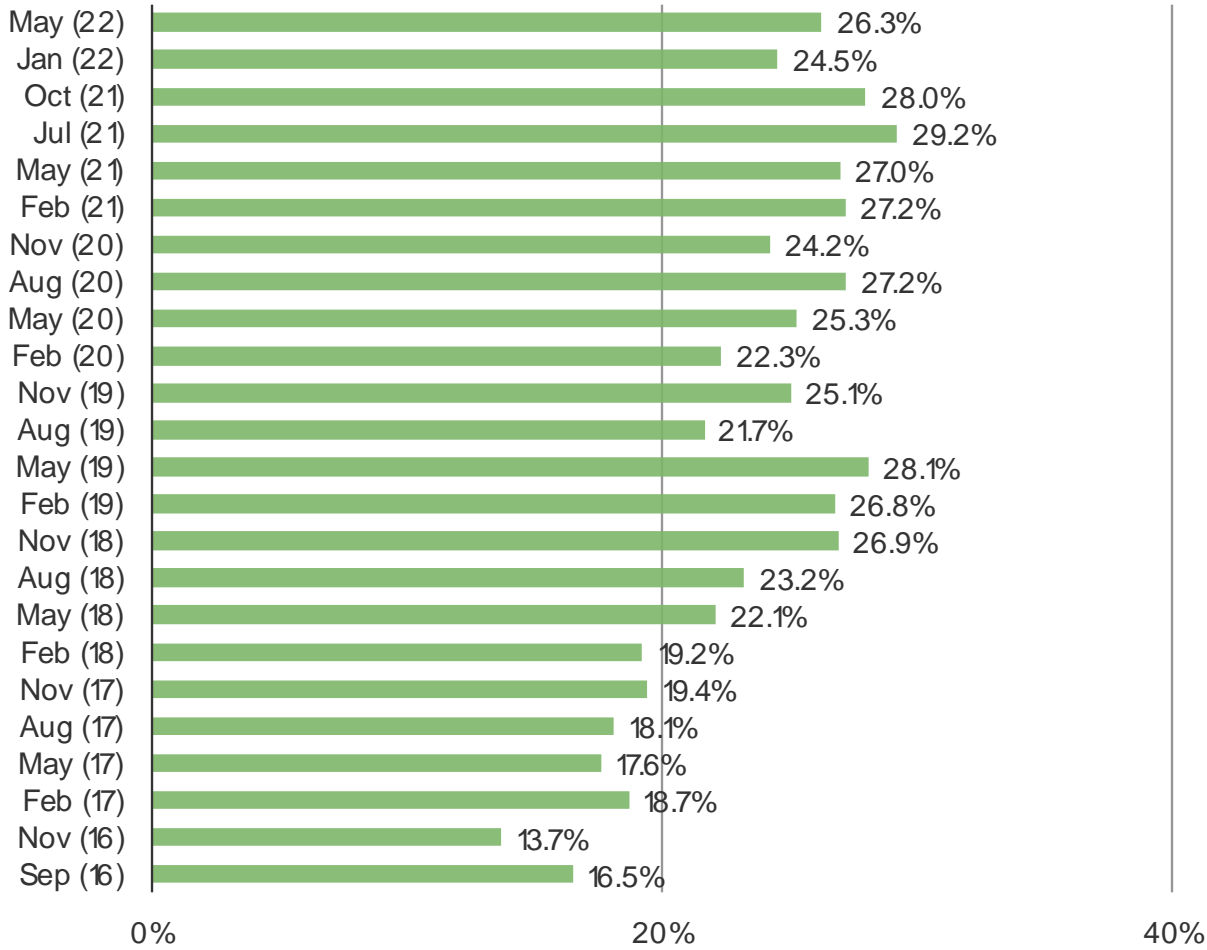
HAVE YOU MOVED IN THE PAST SIX MONTHS?

Posed to all respondents



DO YOU PLAN TO MOVE IN THE NEXT SIX MONTHS?

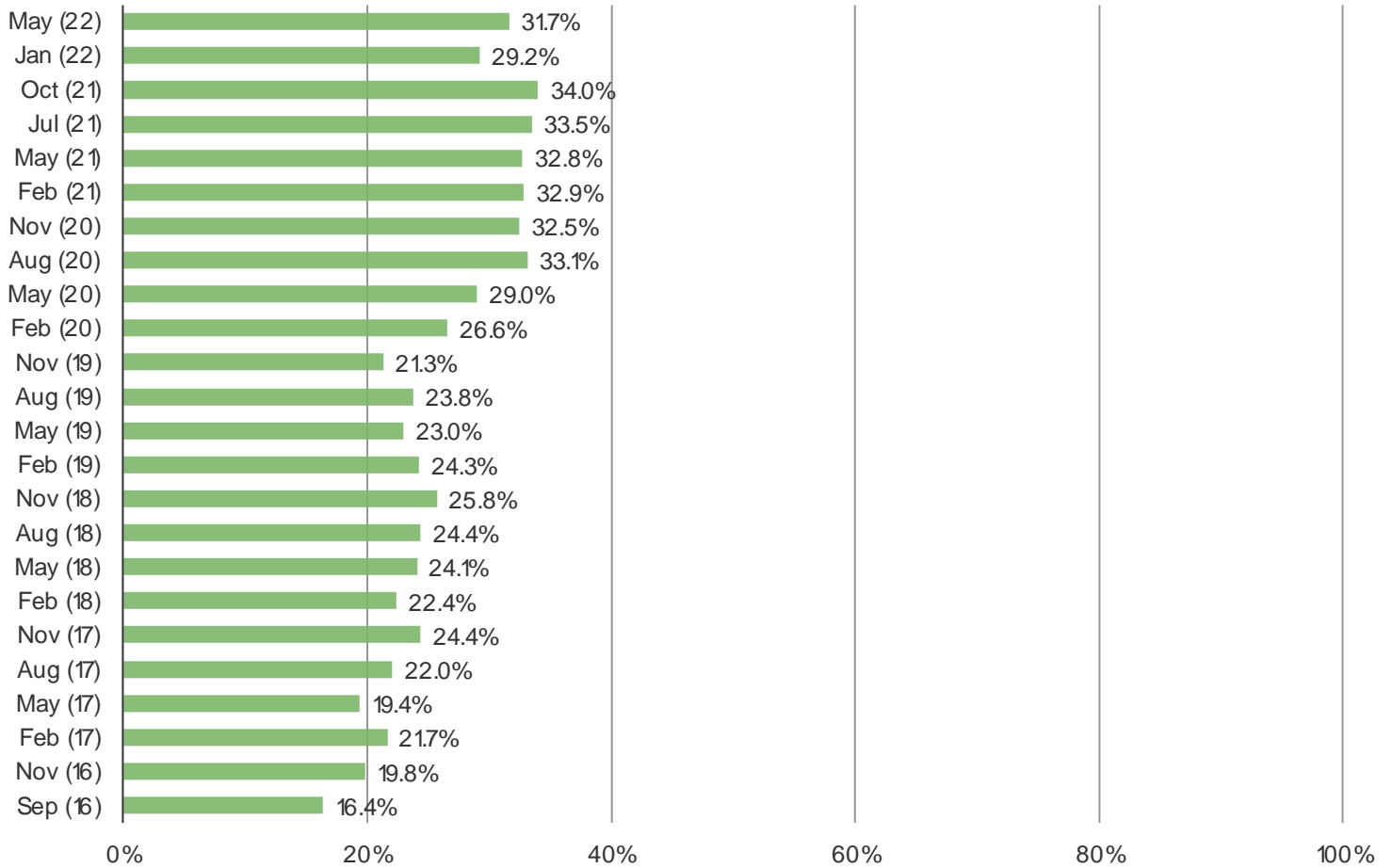
Posed to all respondents





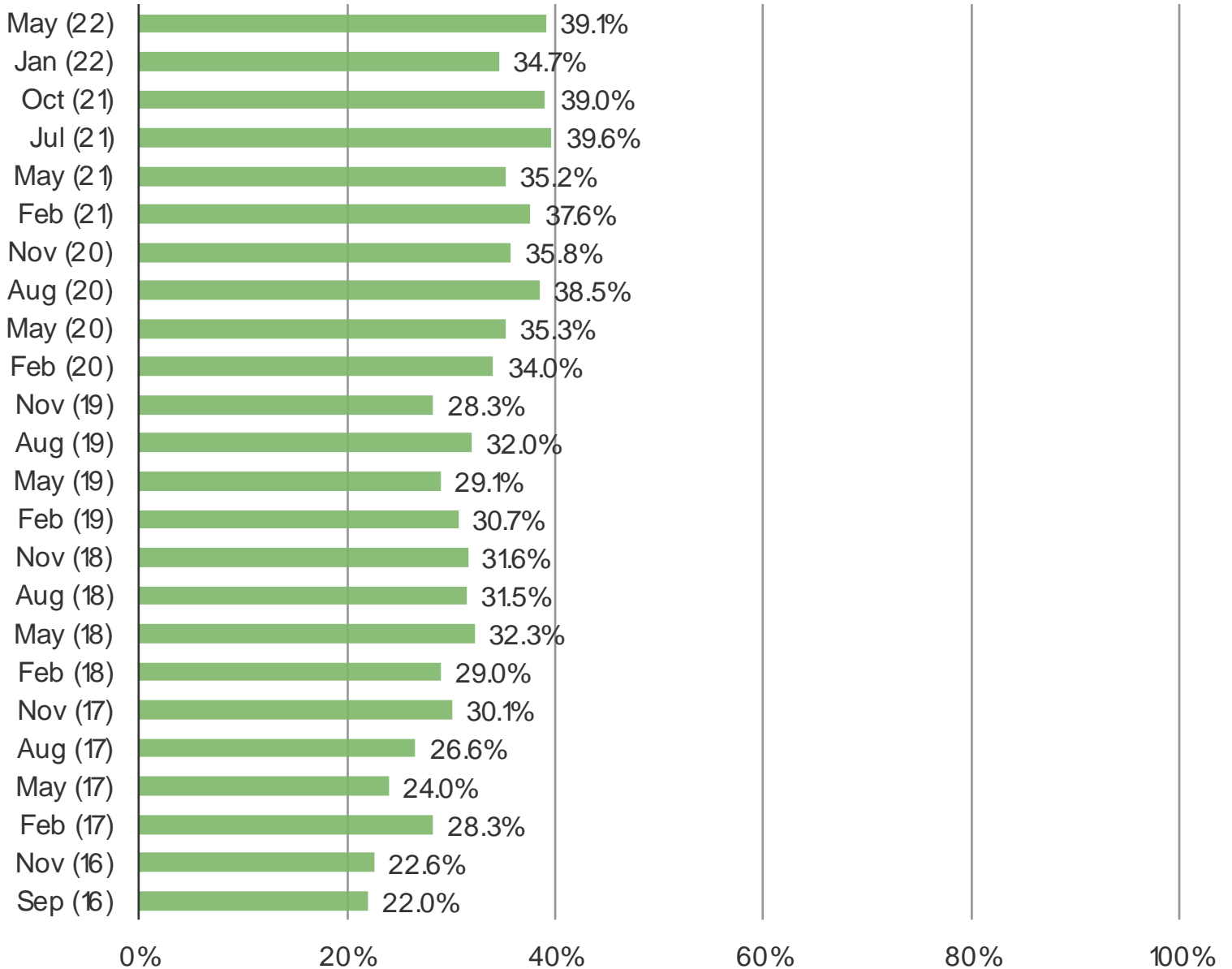
HAVE YOU RENOVATED OR REMODELED YOUR HOME IN THE PAST SIX MONTHS?

Posed to all respondents



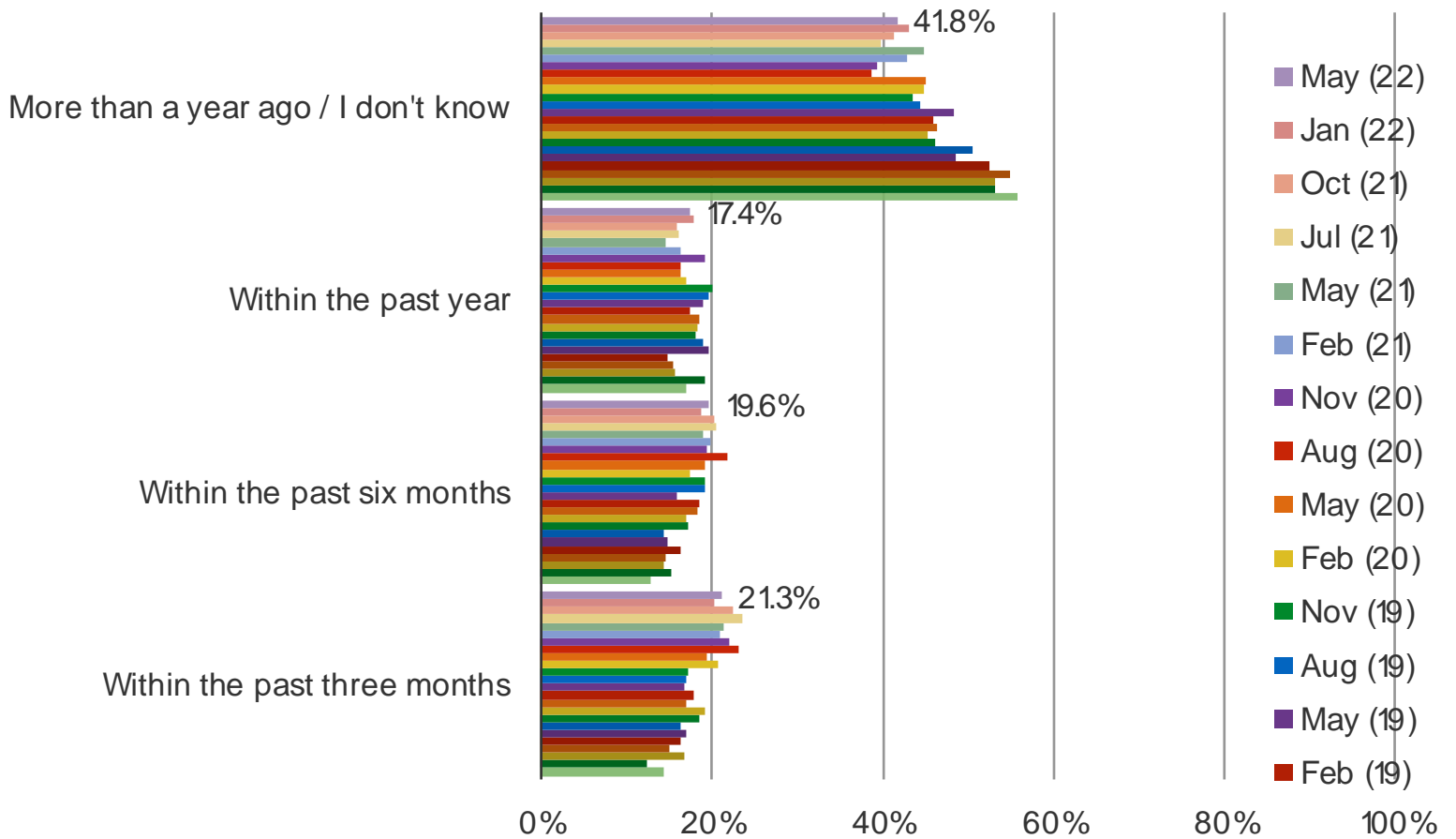
DO YOU PLAN TO RENOVATE OR REMODEL YOUR HOME IN THE NEXT FEW MONTHS?

Posed to all respondents



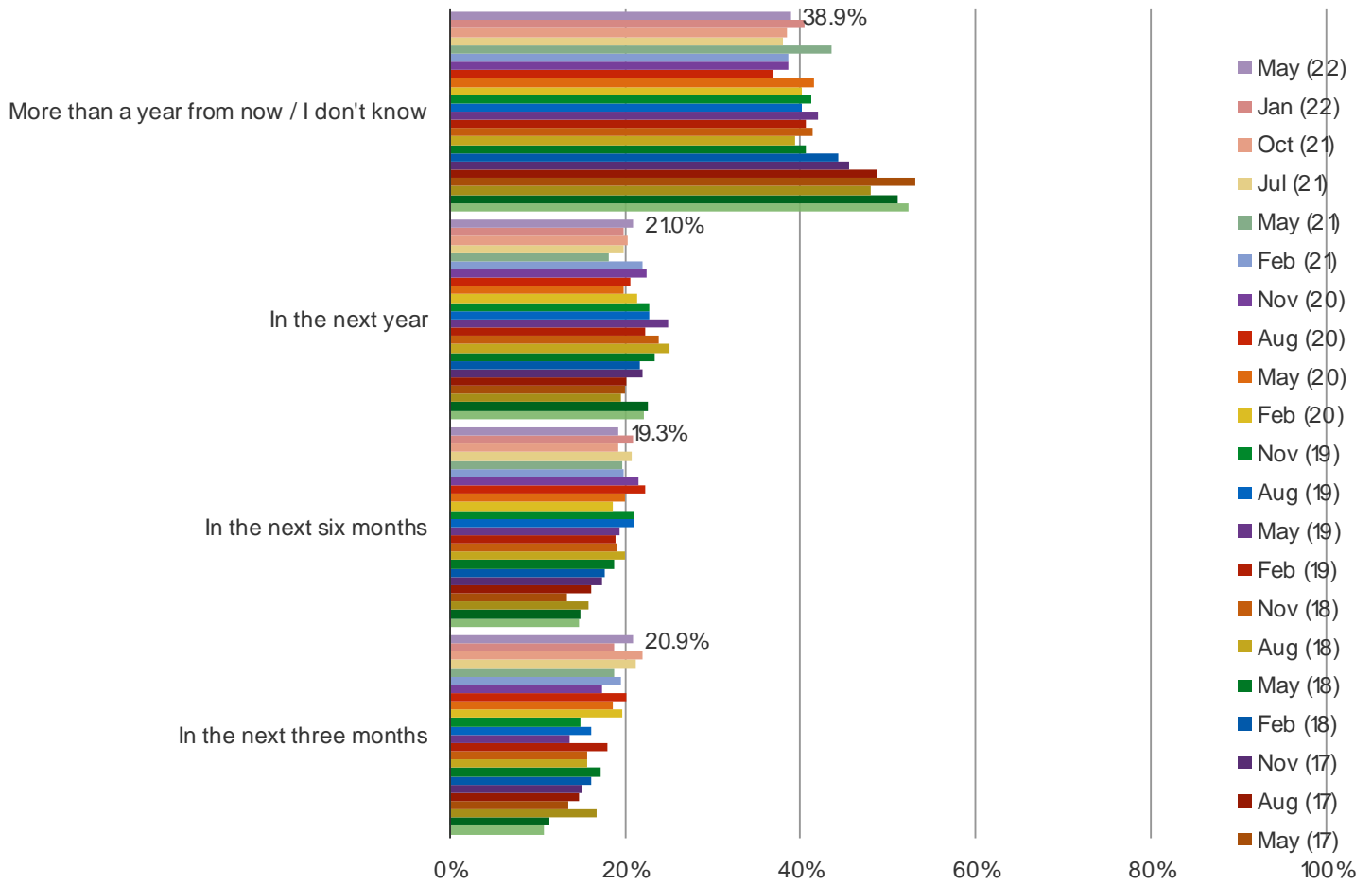
WHEN IS THE LAST TIME YOU PURCHASED FURNITURE FOR YOUR HOME?

Posed to all respondents



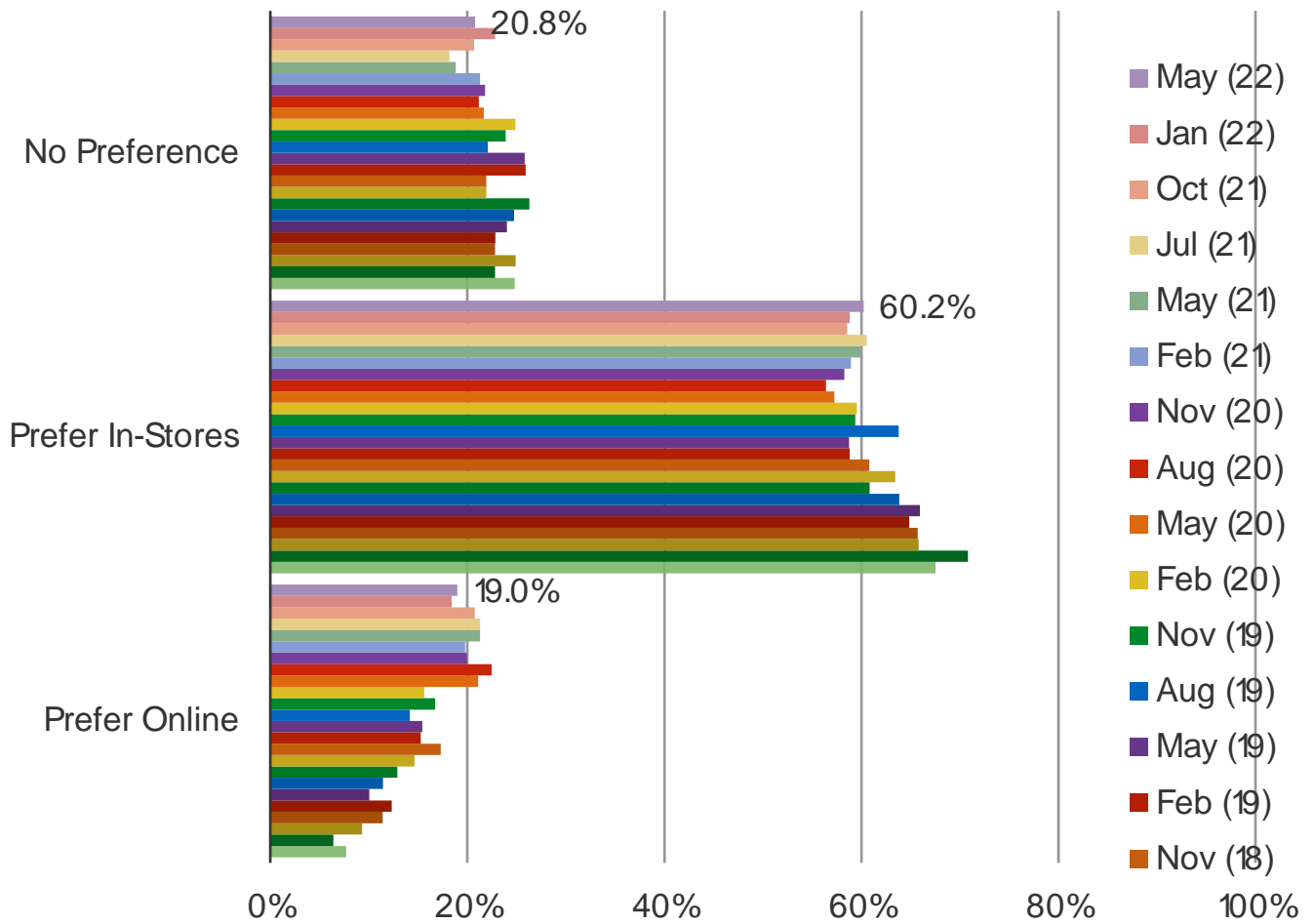
WHEN DO YOU EXPECT TO BUY FURNITURE FOR YOUR HOME NEXT?

Posed to all respondents



DO YOU PREFER TO BUY FURNITURE IN-STORES OR ONLINE?

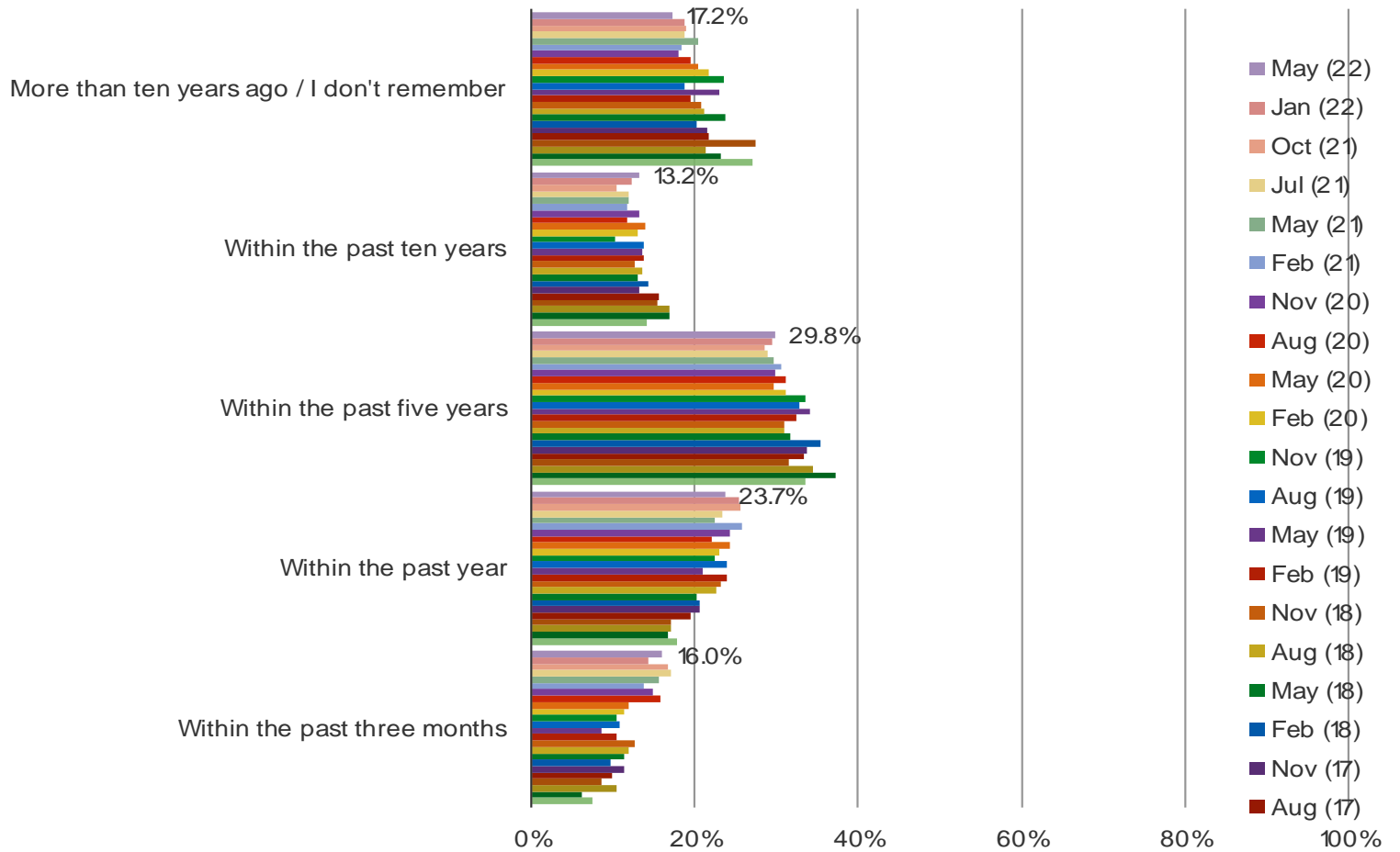
Posed to all respondents



## MATTRESSES PURCHASE ACTIVITY

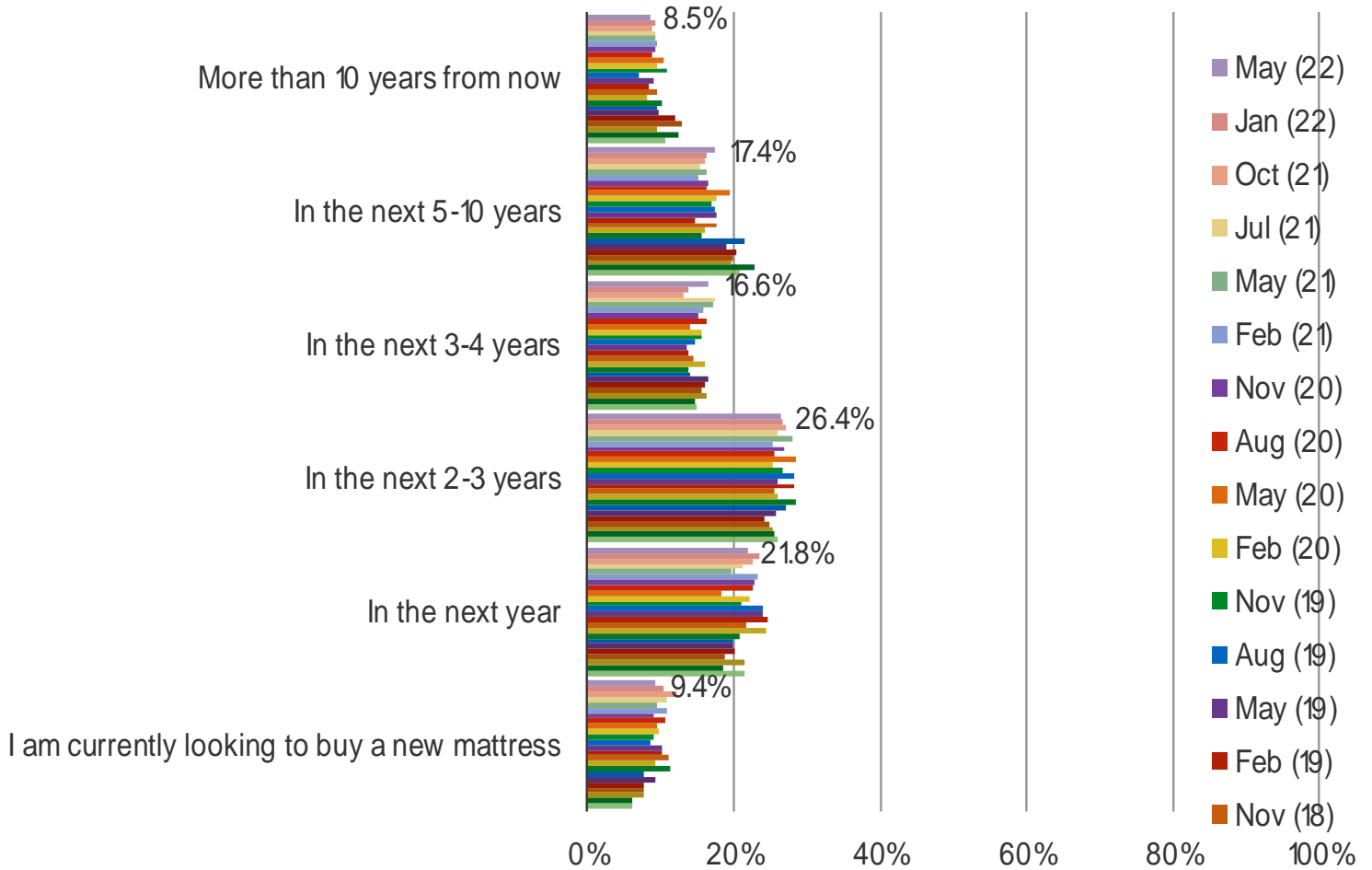
LAST TIME PURCHASED A MATTRESS

Posed to all respondents



WHEN DO YOU EXPECT TO GET A NEW MATTRESS?

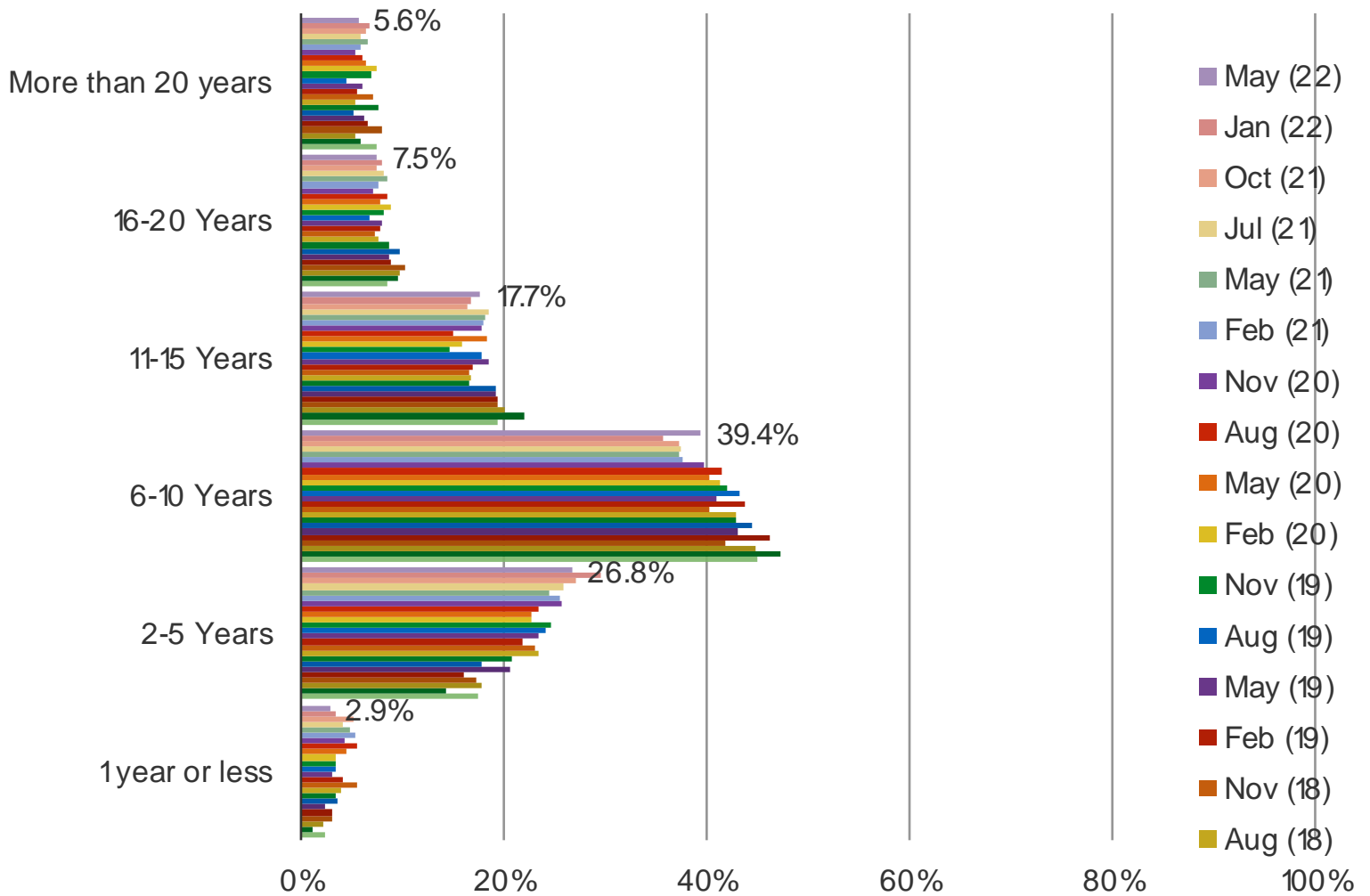
Posed to all respondents





HOW LONG DO YOU BELIEVE MATTRESSES SHOULD LAST?

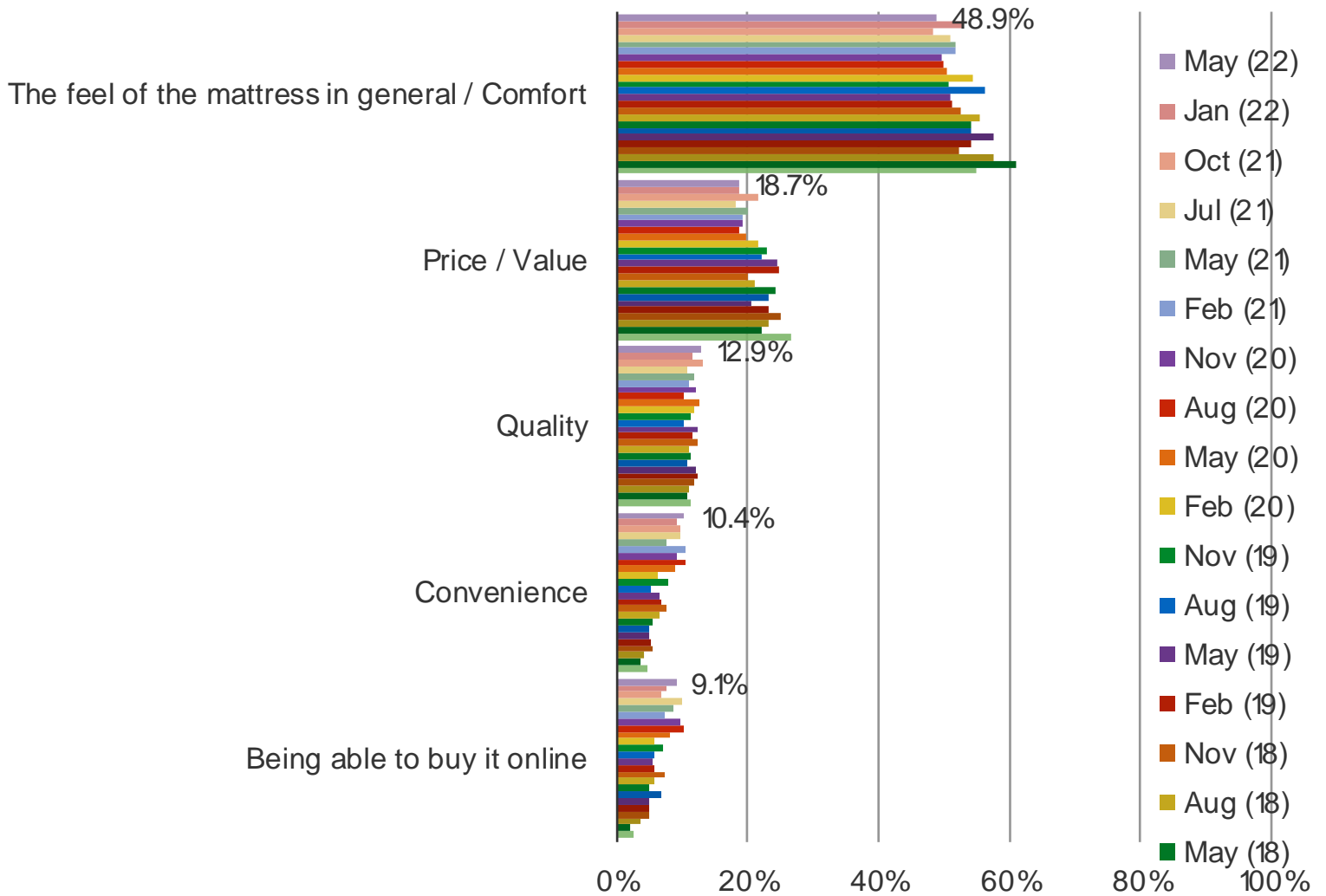
Posed to all respondents



## CATALYSTS / DECISION DRIVERS

WHICH OF THE FOLLOWING WOULD MATTER MOST TO YOU IF YOU WERE SHOPPING FOR A MATTRESS?

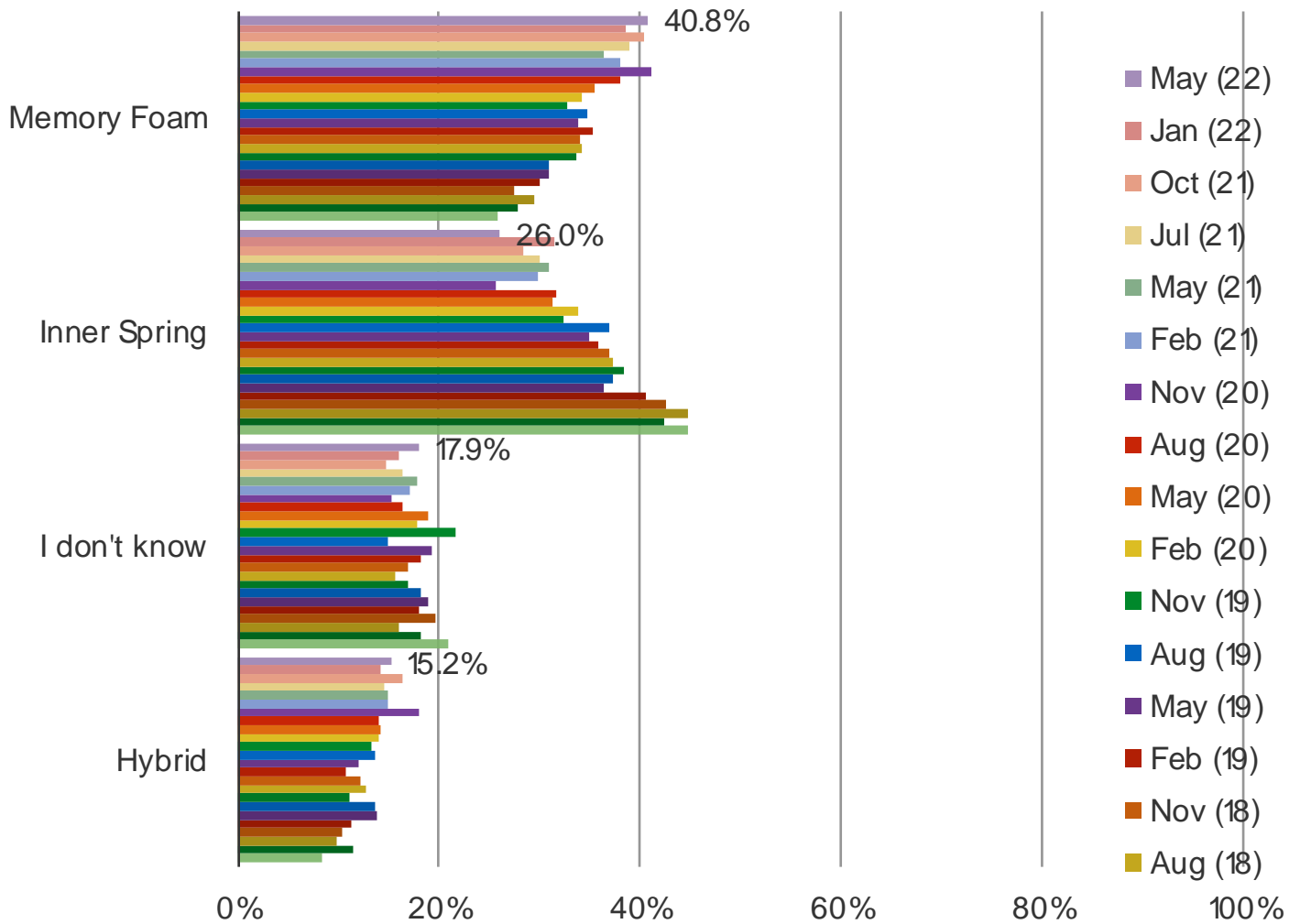
Posed to all respondents



## MEMORY FOAM VS. INNER SPRING

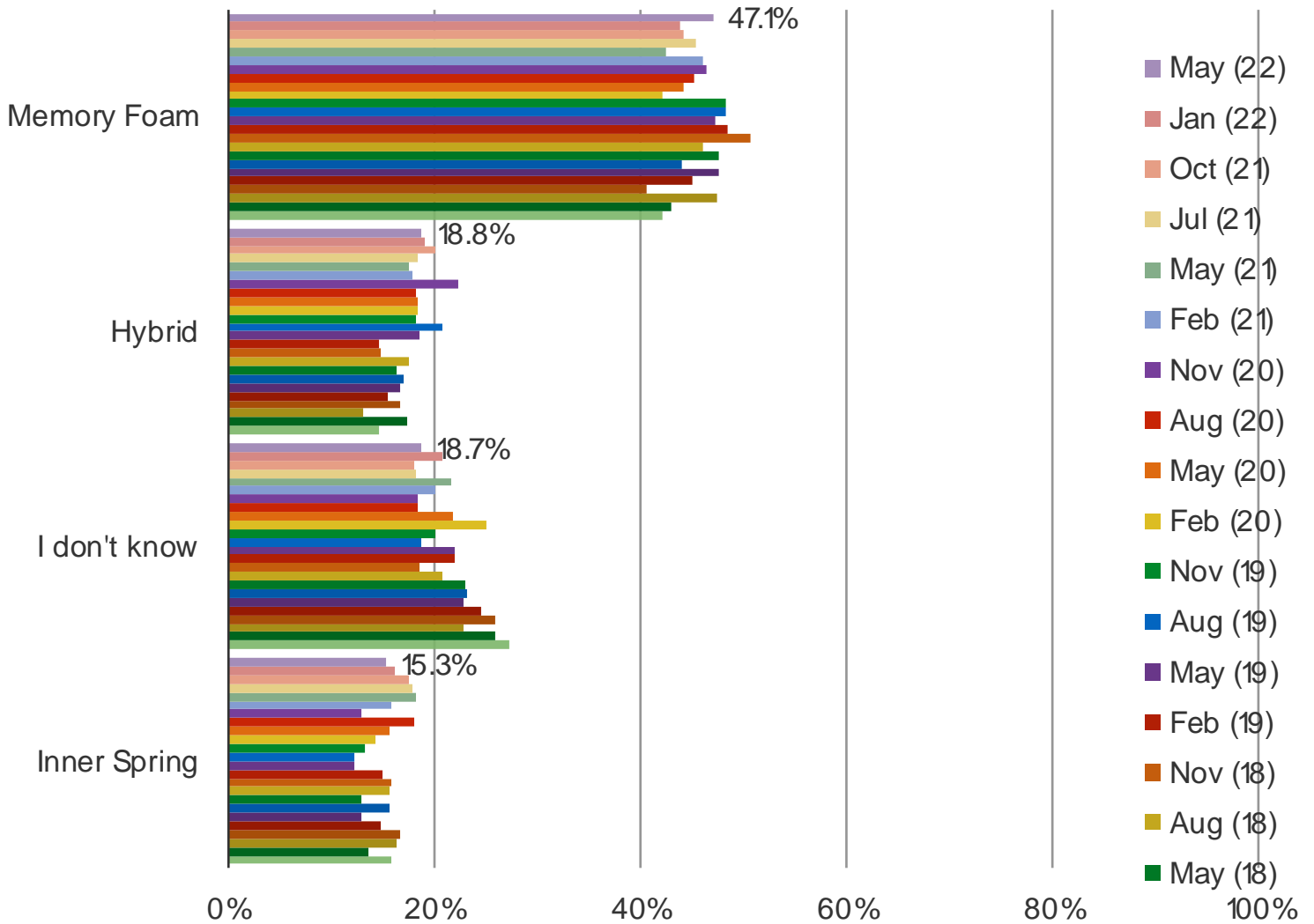
WHICH BEST DESCRIBES THE TYPE OF MATTRESS THAT YOU CURRENTLY SLEEP ON?

Posed to all respondents



IF YOU WERE BUYING A MATTRESS TODAY, WHICH WOULD YOU BE MOST LIKELY TO PURCHASE?

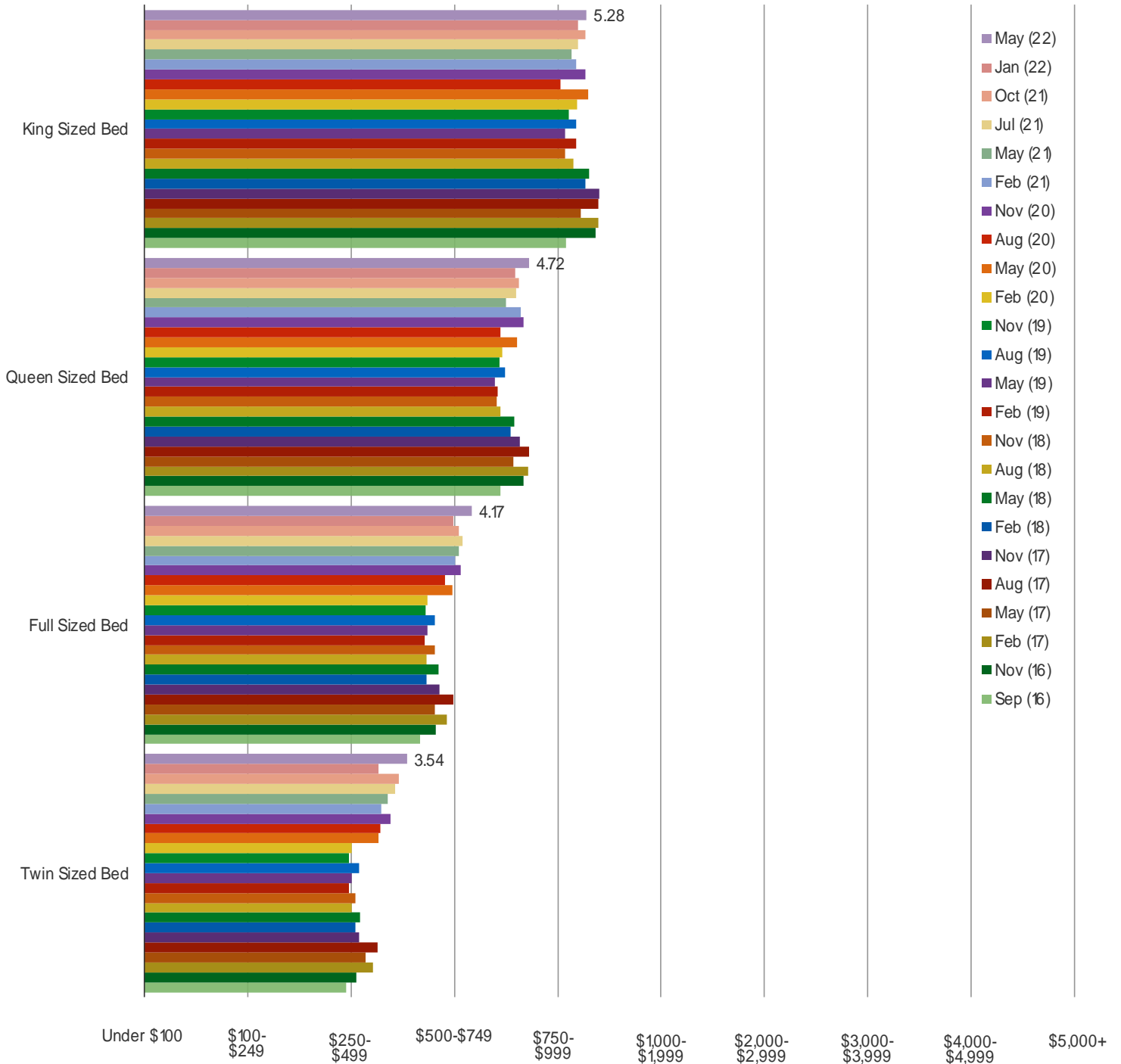
Posed to all respondents



## PRICE EXPECTATIONS

EXPECTATIONS FOR SPENDING ON MATTRESSES BY SIZE

Posed to all respondents

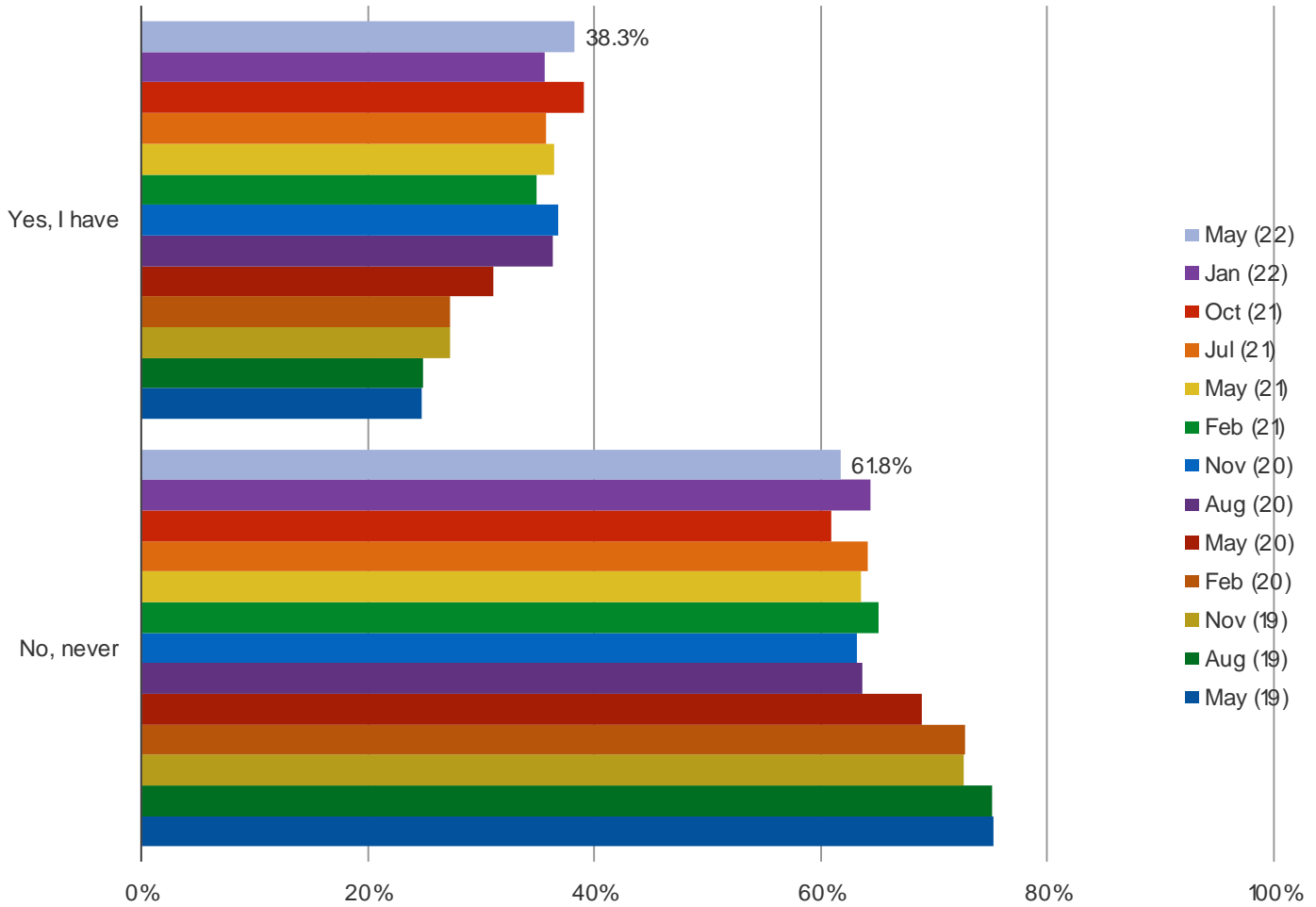




## IN-STORE VS. ONLINE

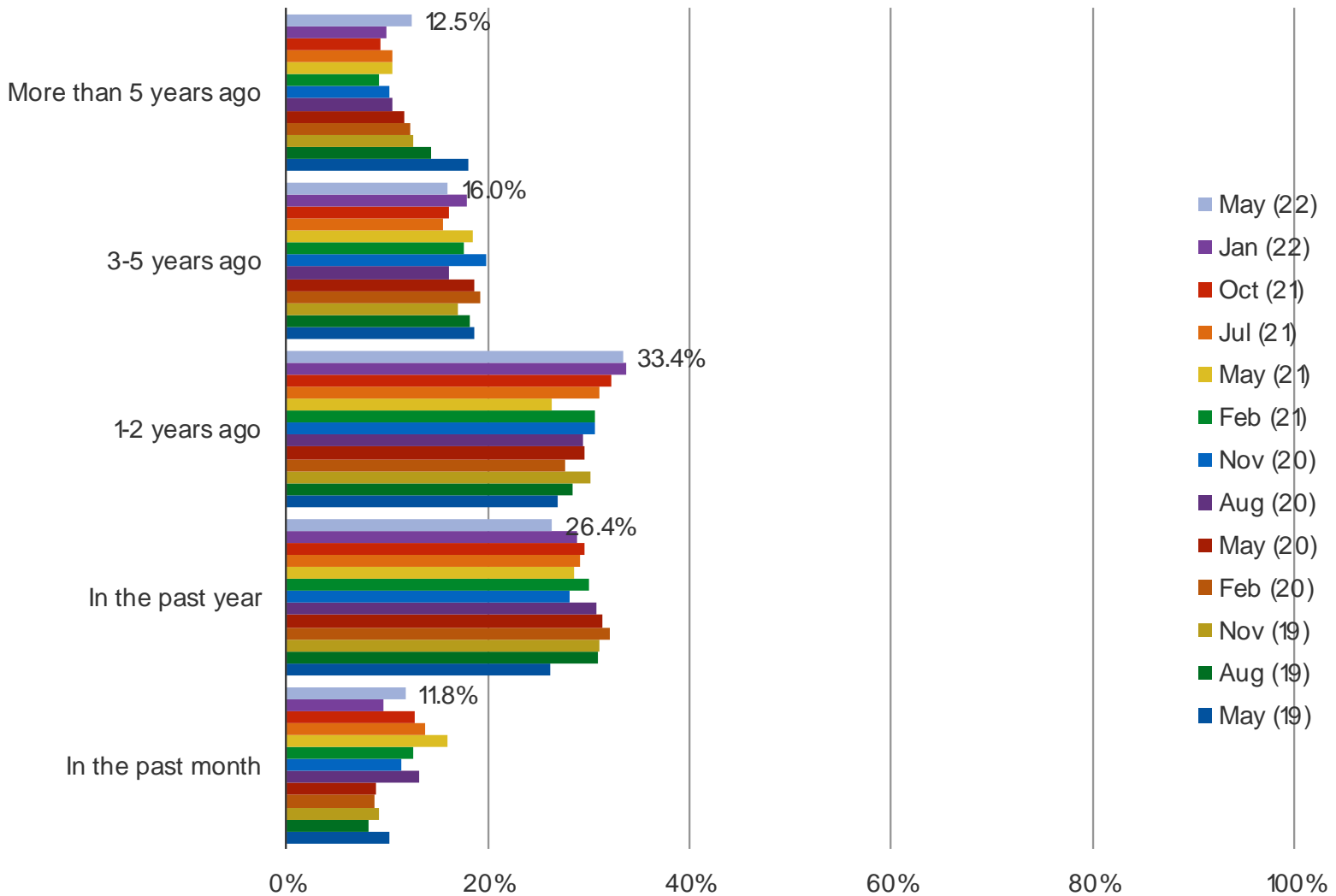
HAVE YOU EVER ORDERED A MATTRESS ONLINE? (IE. A BED-IN-A-BOX MATTRESS)

Posed to all respondents



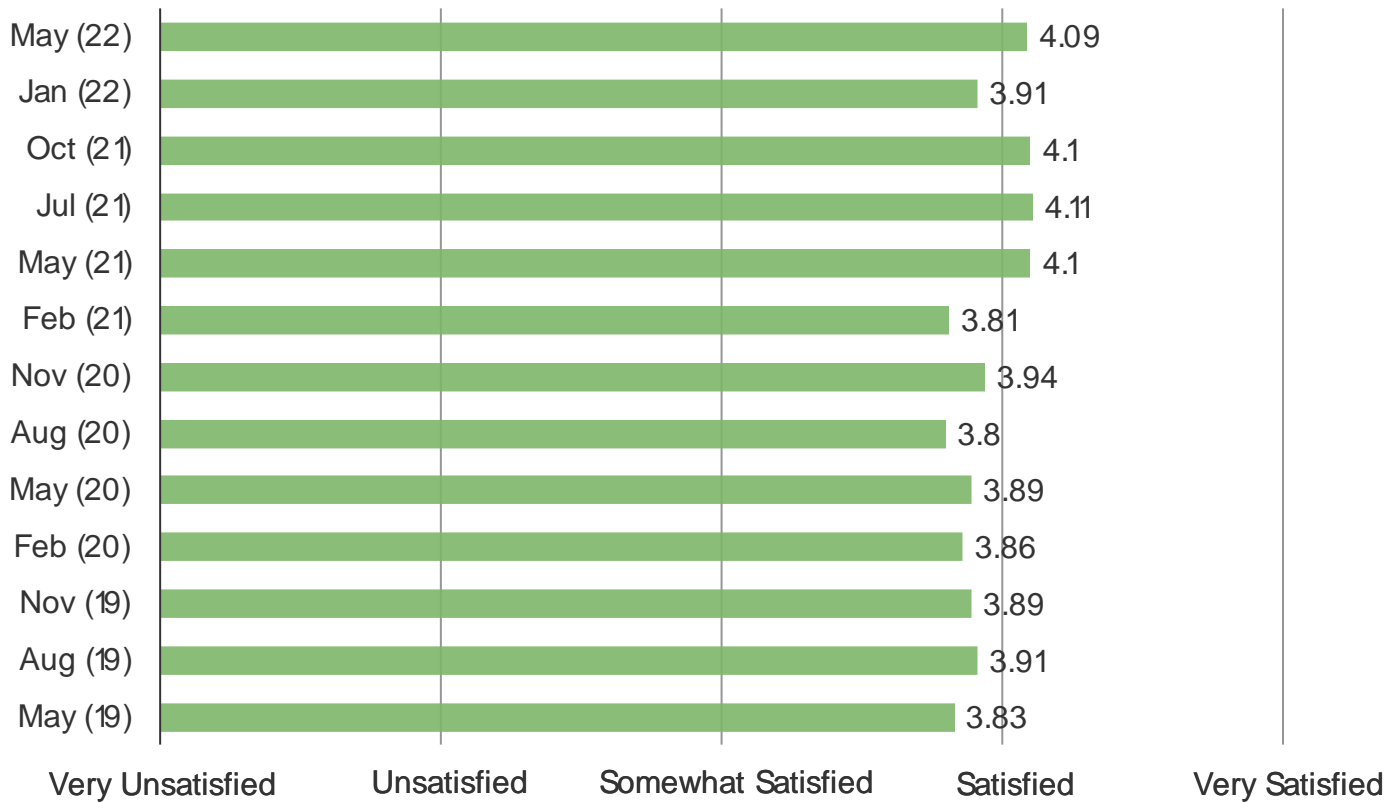
WHEN DID YOU MAKE YOUR MOST RECENT BED-IN-A-BOX ONLINE MATTRESS PURCHASE?

Posed to respondents who have ordered a mattress online



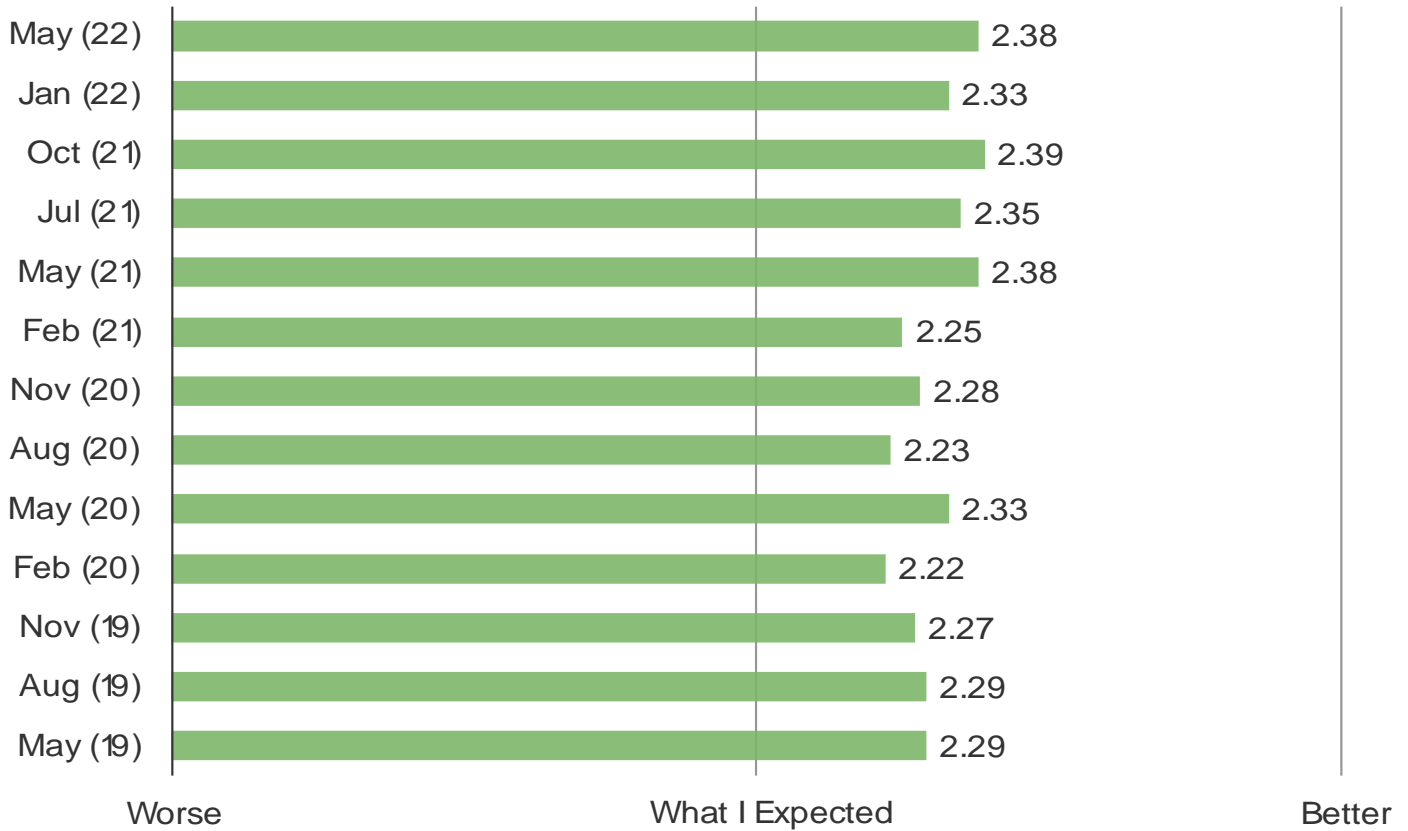
HOW SATISFIED ARE YOU WITH YOUR BED-IN-A-BOX MATTRESS?

Posed to respondents who have ordered a mattress online



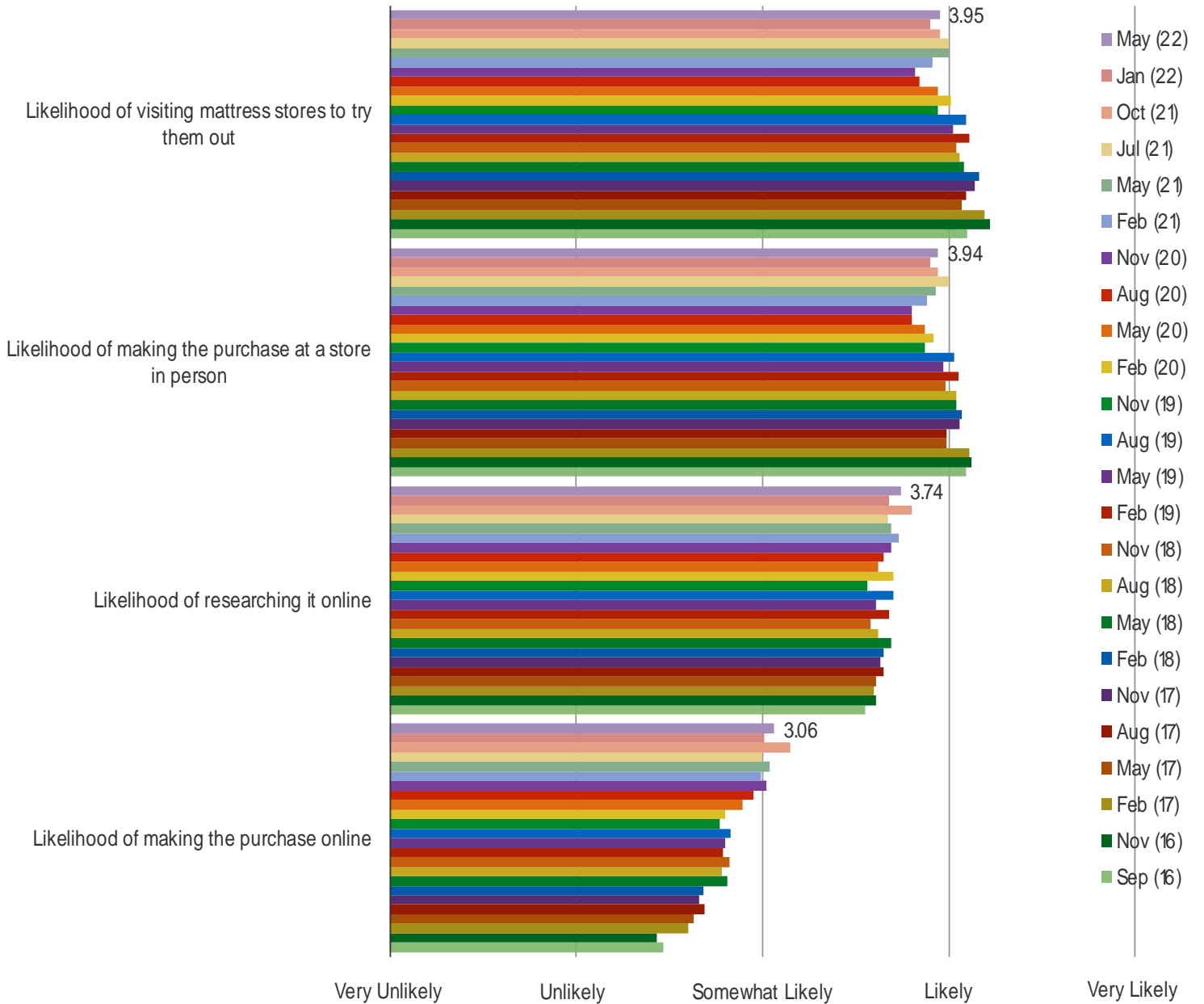
HOW IS THE MATTRESS HOLDING UP OVER TIME COMPARED TO YOUR EXPECTATIONS?

Posed to respondents who have ordered a mattress online



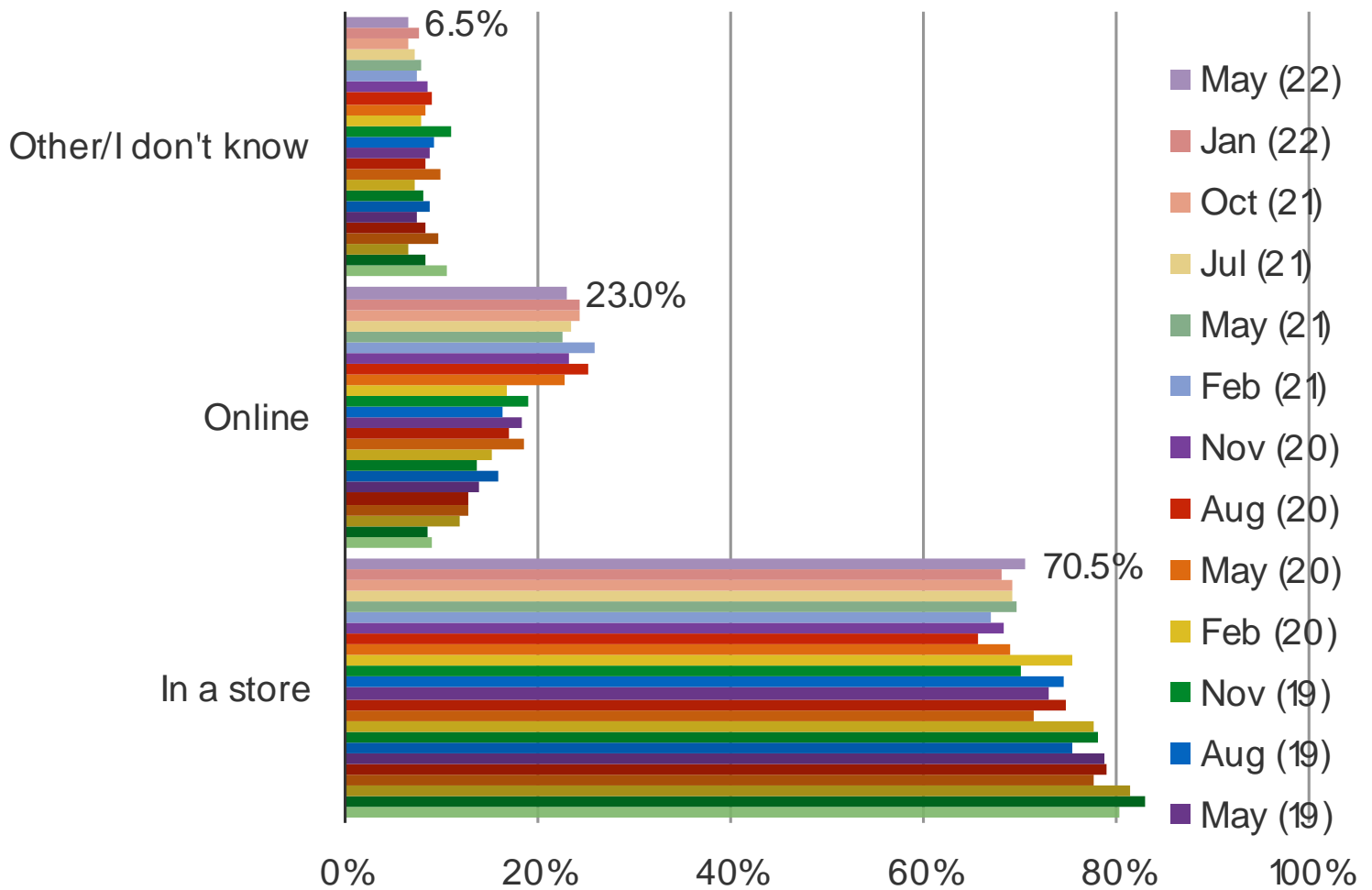
IF YOU NEEDED TO BUY A MATTRESS, HOW LIKELY WOULD YOU BE TO...

Posed to all respondents



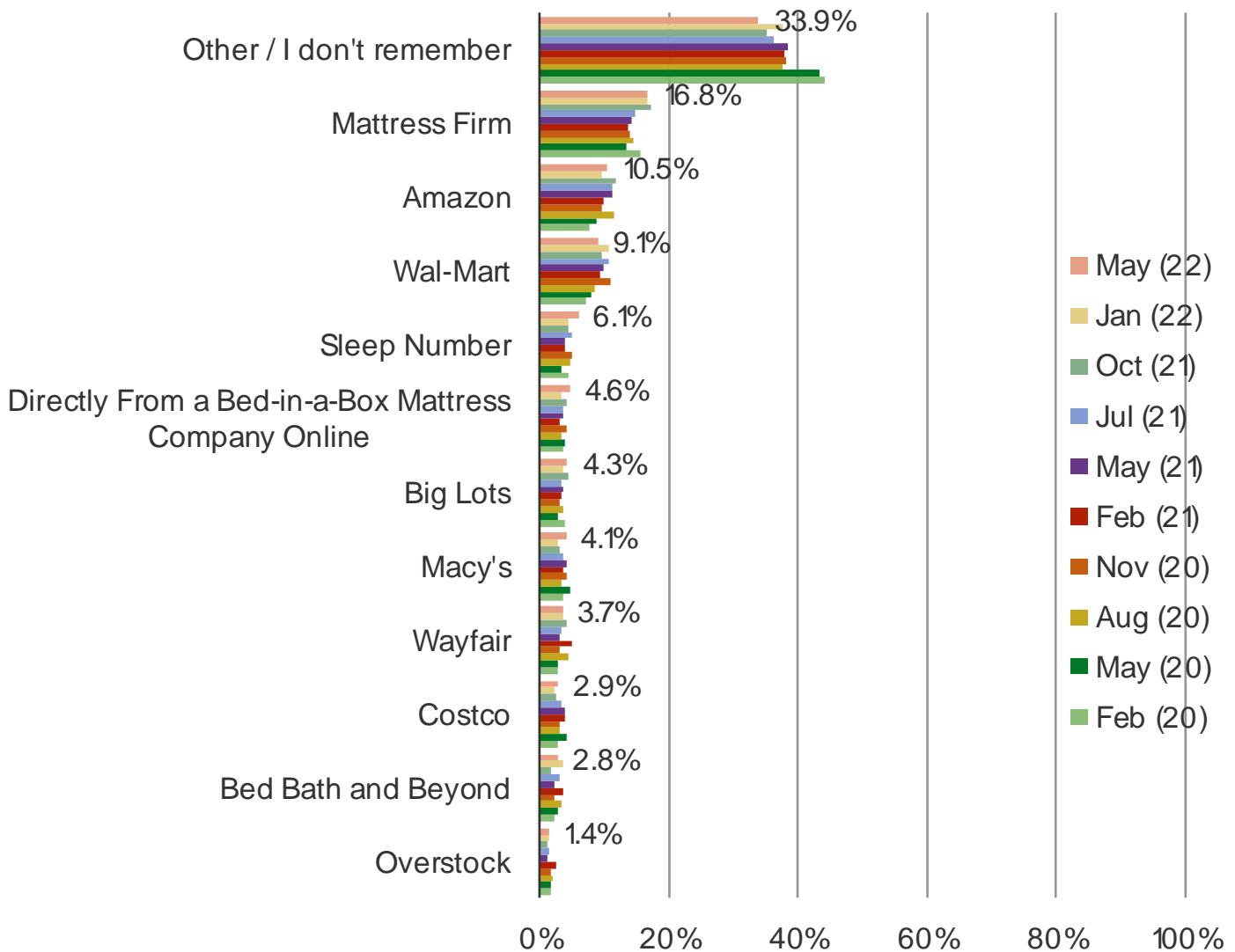
HOW DID YOU PURCHASE THE MOST RECENT MATTRESS THAT YOU BOUGHT?

Posed to all respondents



FROM WHICH STORE/WEBSITE DID YOU MAKE YOUR MOST RECENT MATTRESS PURCHASE?

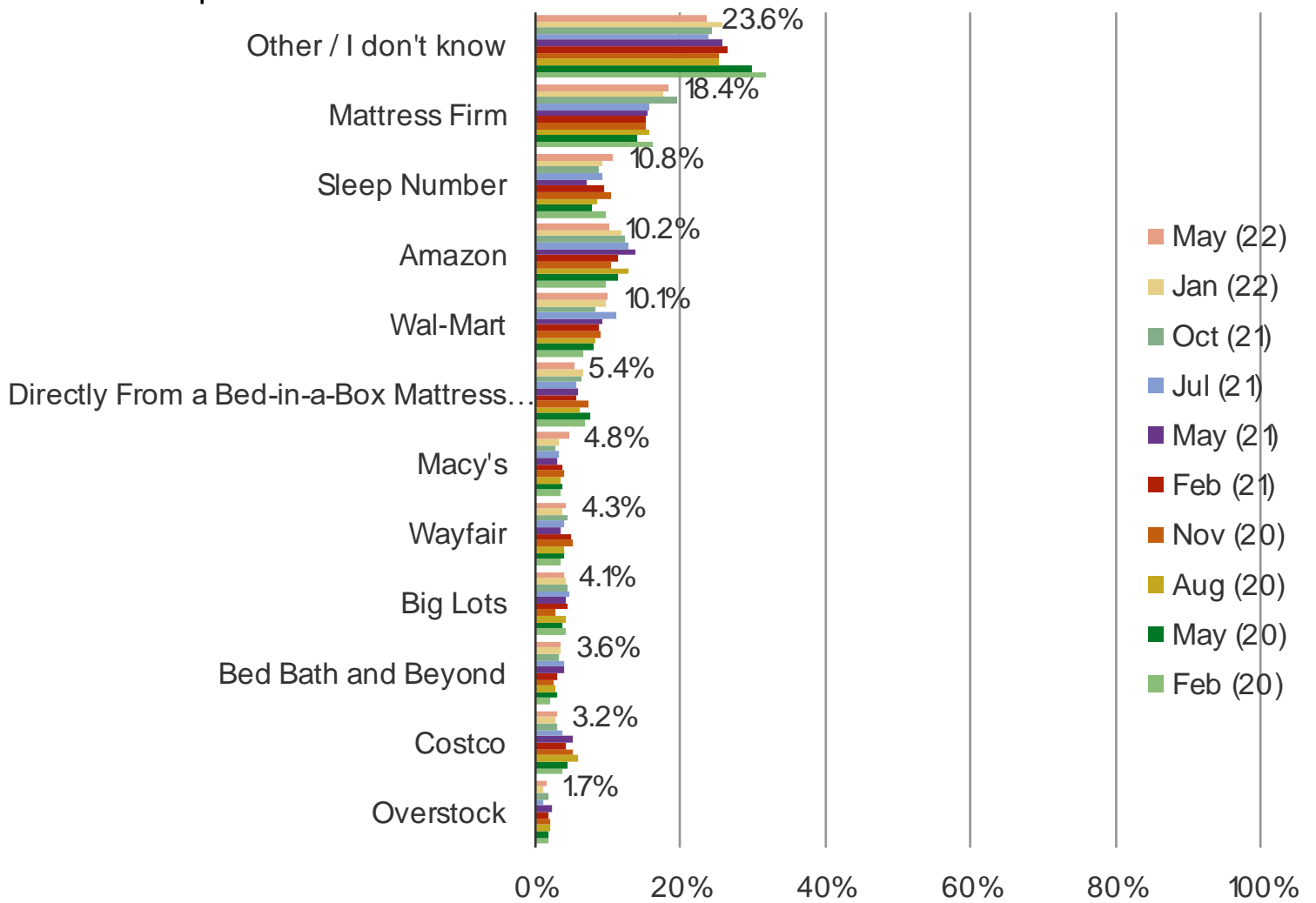
Posed to all respondents





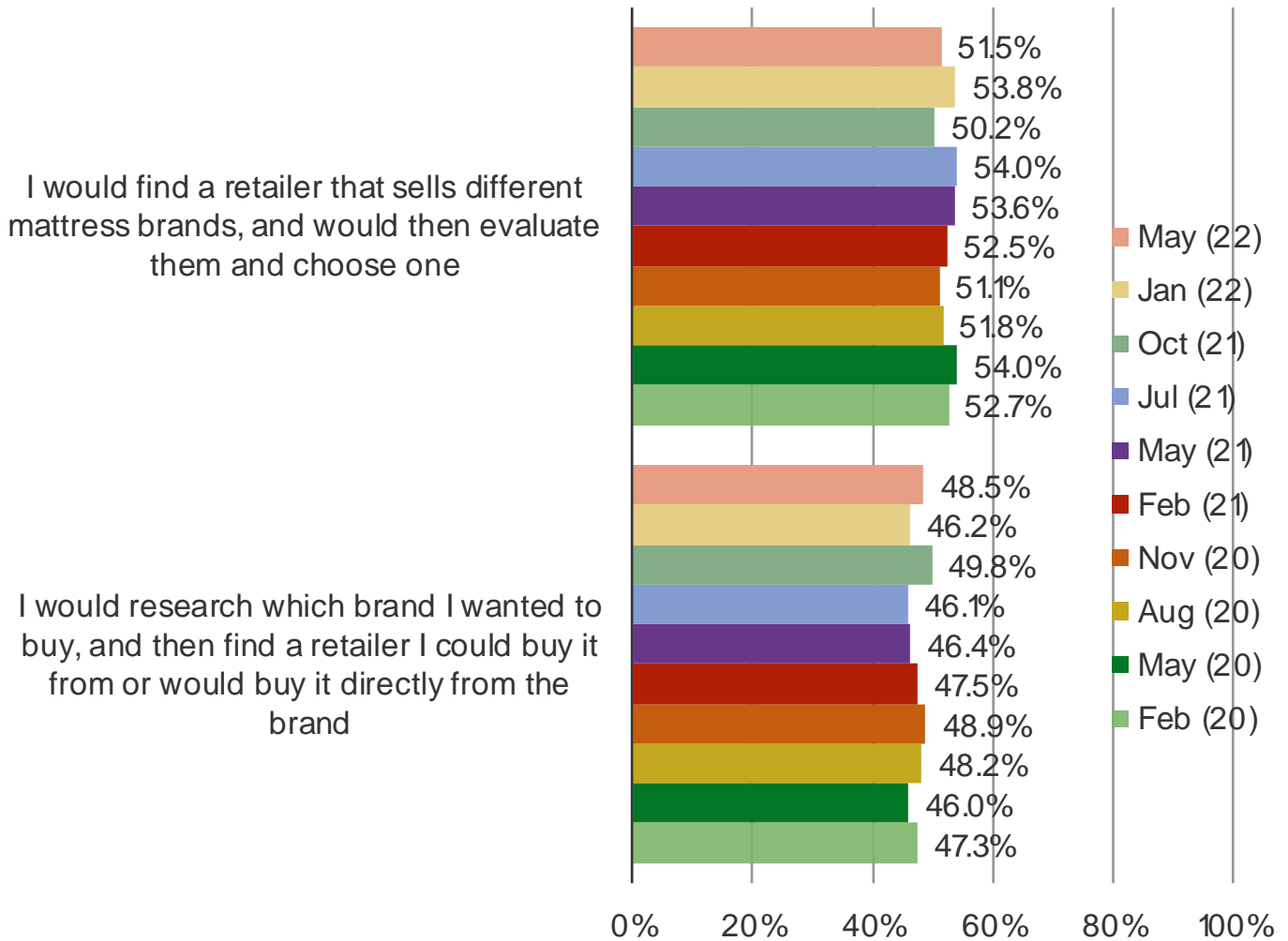
IF YOU HAD TO BUY A MATTRESS TODAY, WHERE WOULD YOU BE MOST LIKELY TO BUY THEM FROM?

Posed to all respondents



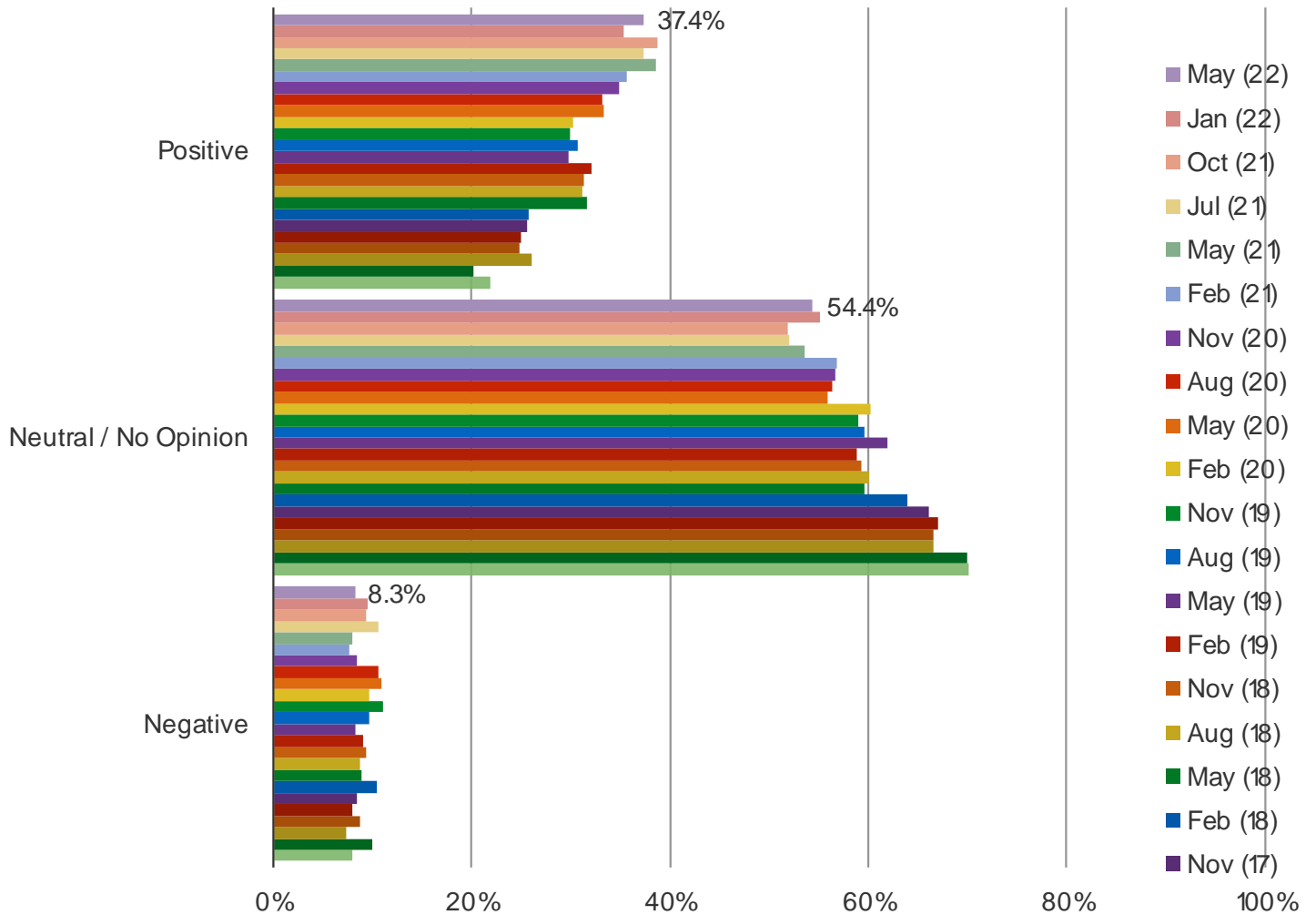
IF YOU NEEDED TO BUY A MATTRESS TODAY, HOW WOULD YOU BEGIN YOUR SEARCH?

Posed to all respondents



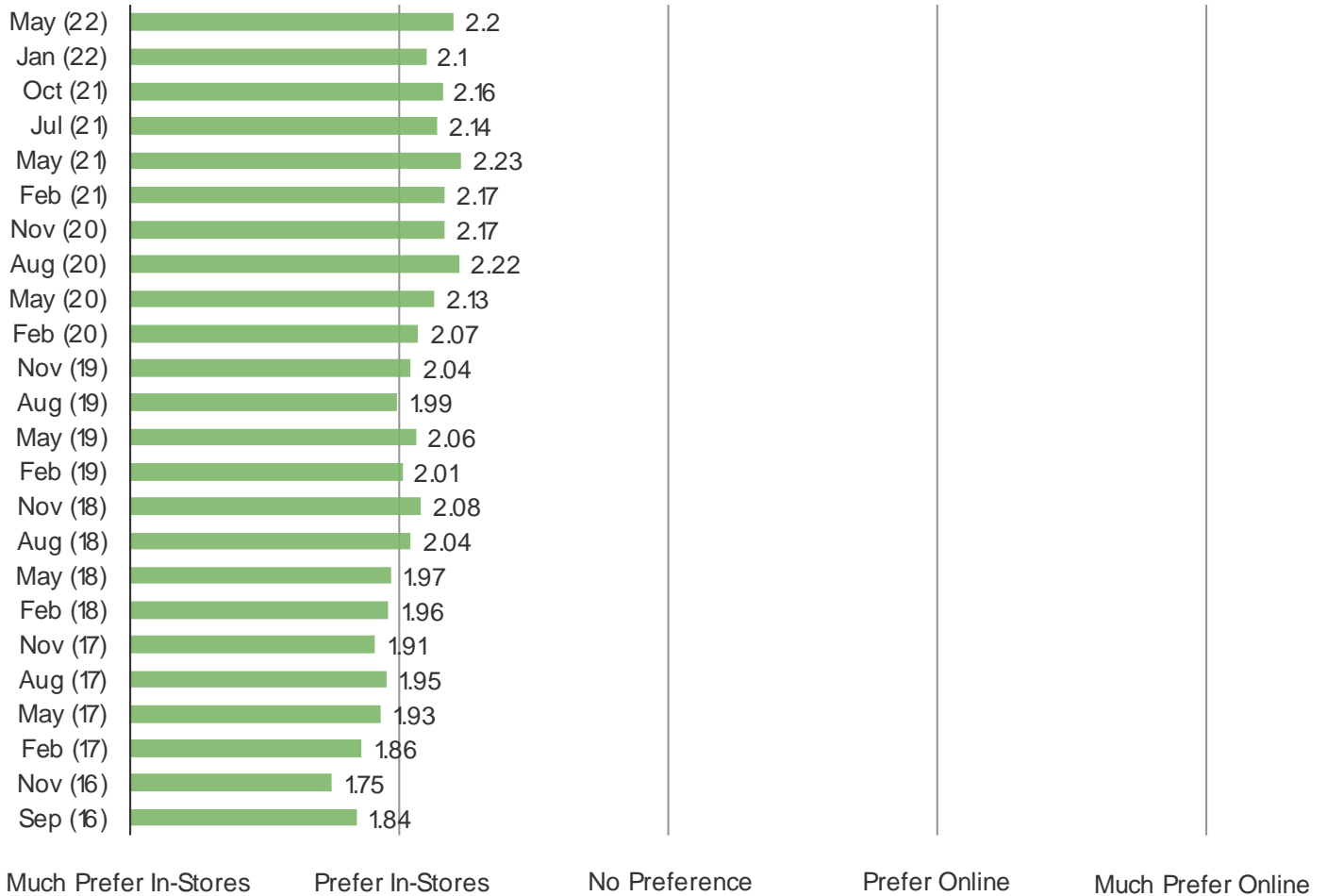
OPINION OF BED IN A BOX MATTRESS PROVIDERS WHO SHIP MATTRESSES TO CUSTOMERS IN A VACUUM SEALED BOX

Posed to all respondents



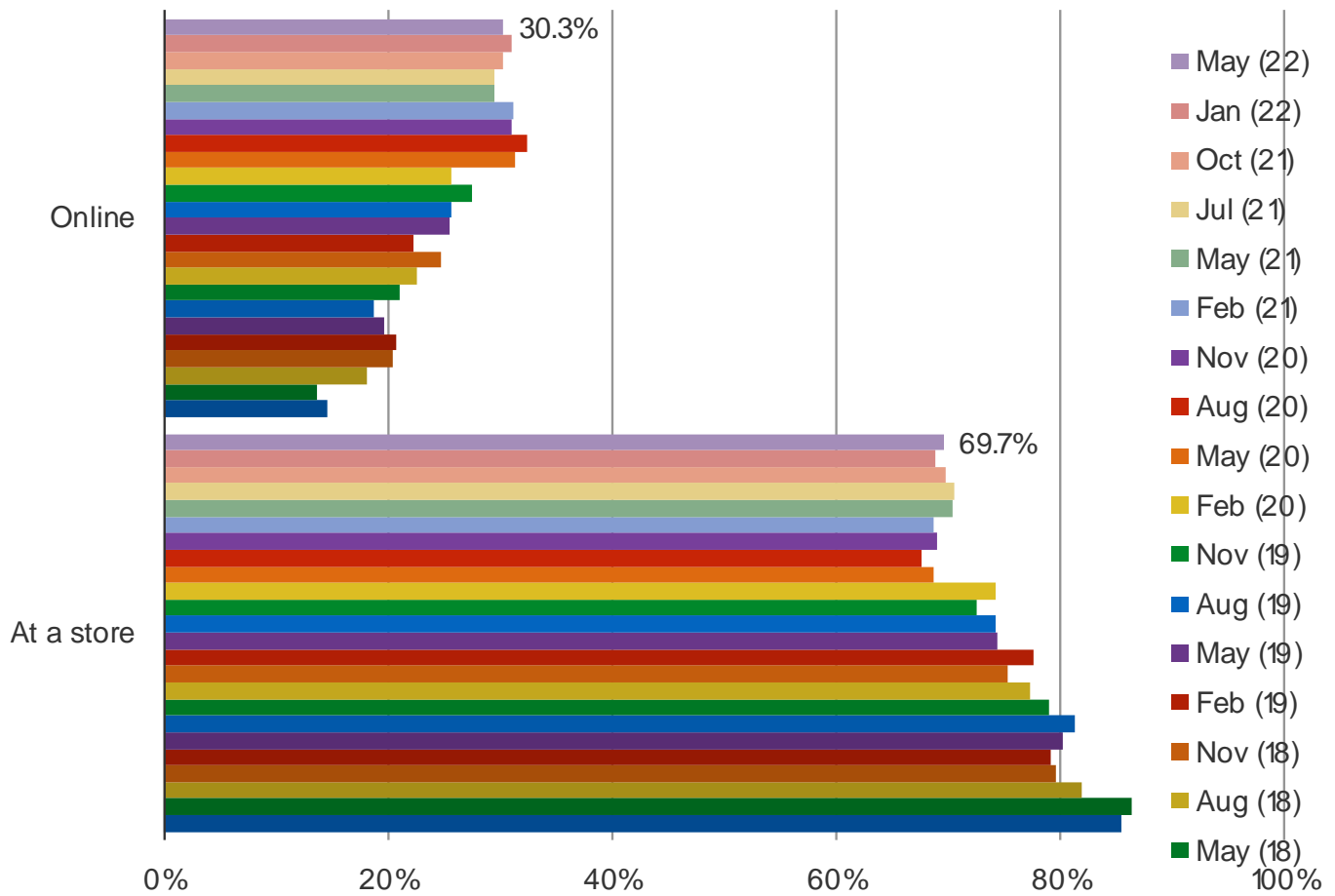
PREFERRED METHOD FOR MATTRESS SHOPPING

Posed to all respondents



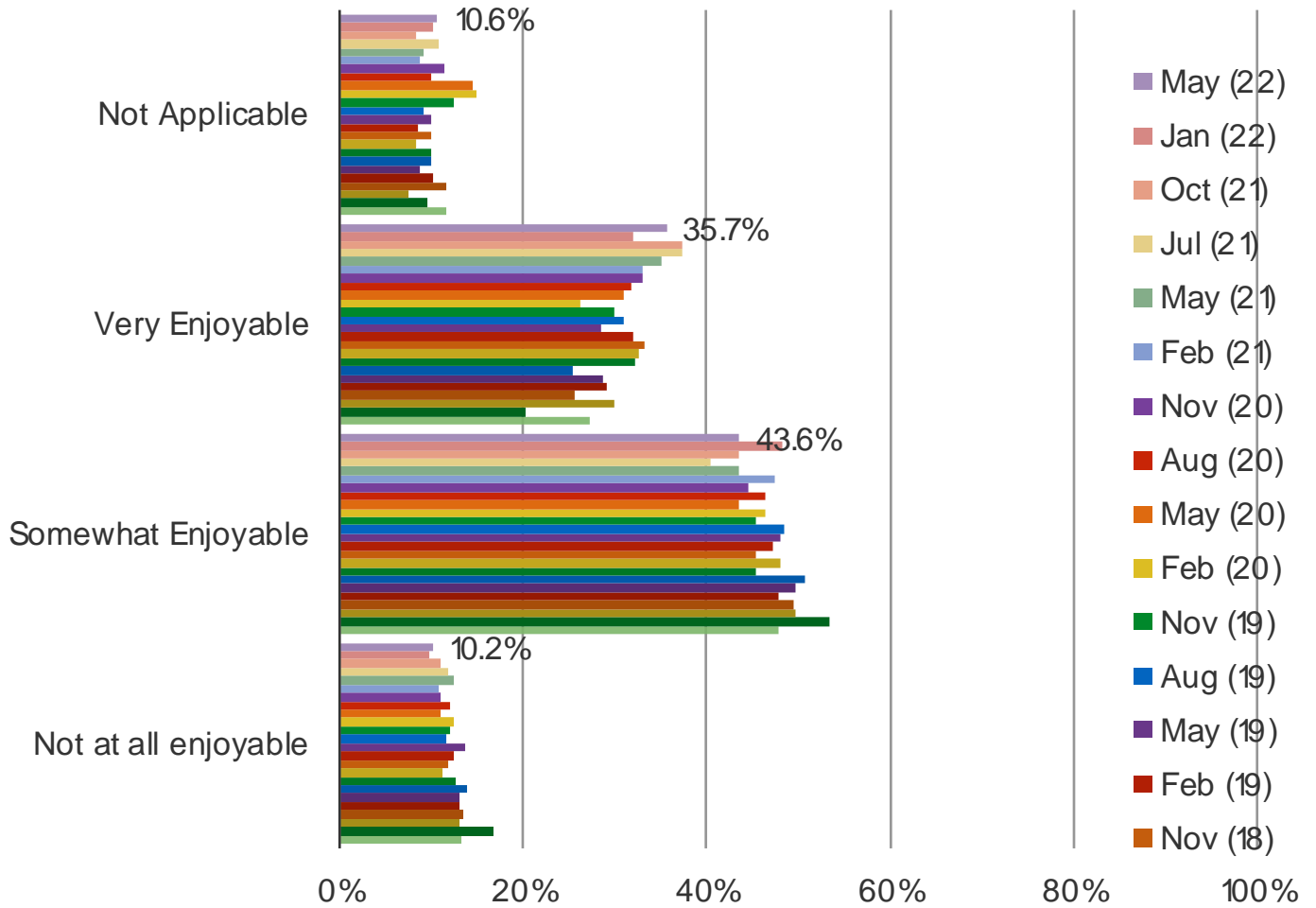
WHEN IT IS TIME TO GET A NEW MATTRESS, DO YOU THINK YOU WILL BUY IT AT A STORE OR ONLINE?

Posed to all respondents



HOW ENJOYABLE DID YOU FIND THE MATTRESS BUYING PROCESS?

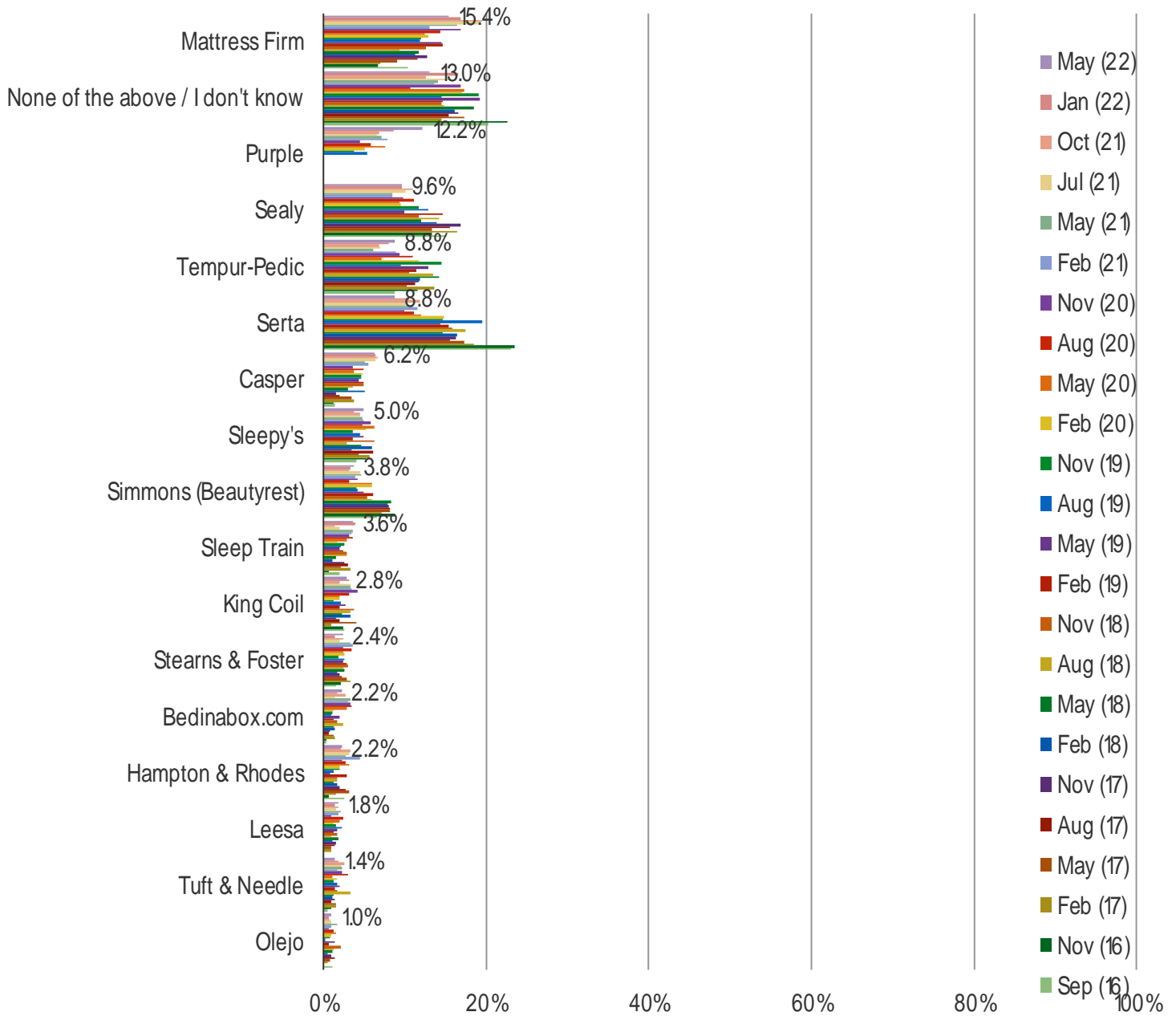
Posed to all respondents



## COMPETITIVE DYNAMICS

WHICH BRAND DID YOU PURCHASE?

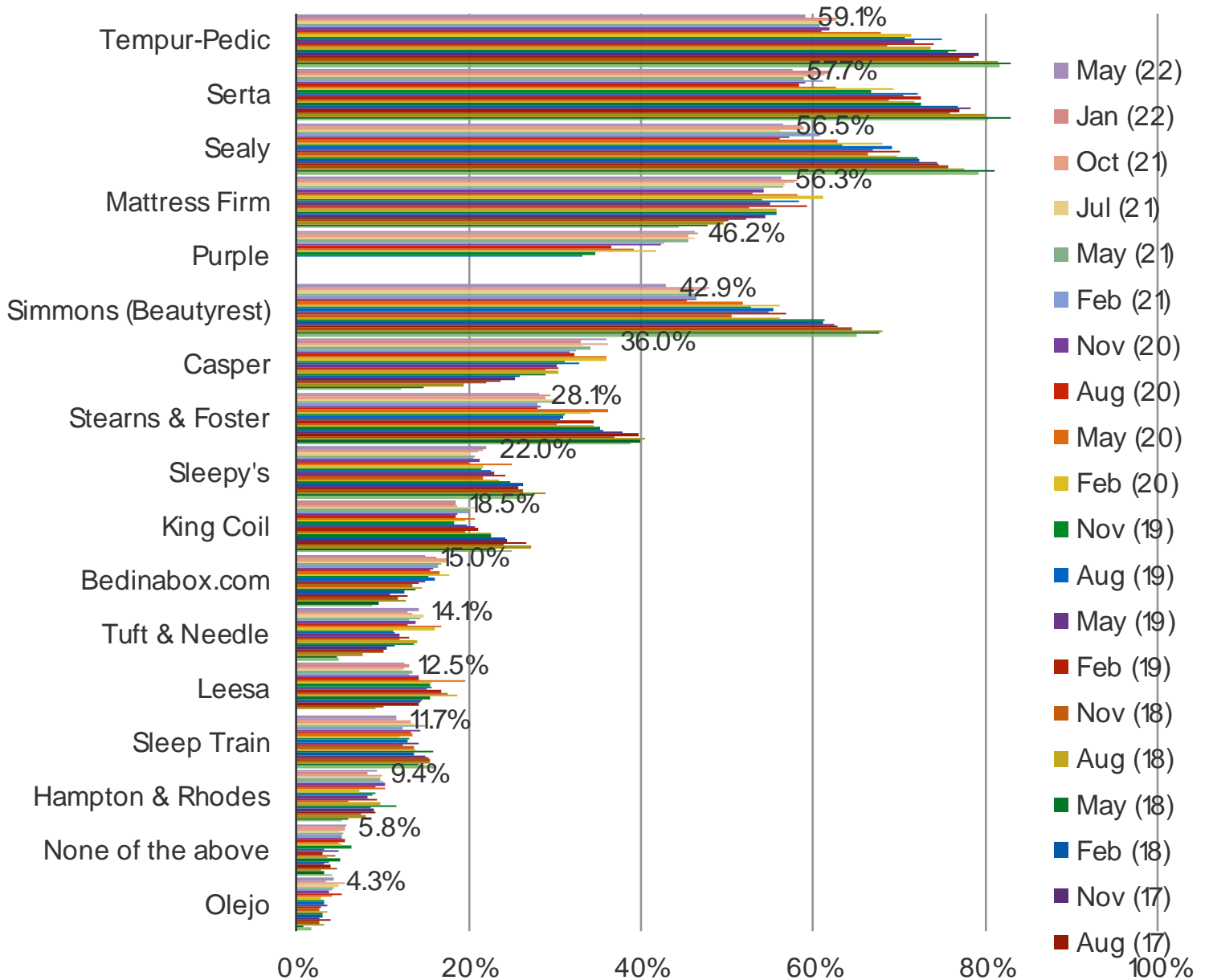
Posed to respondents who purchased a mattress in the past year.





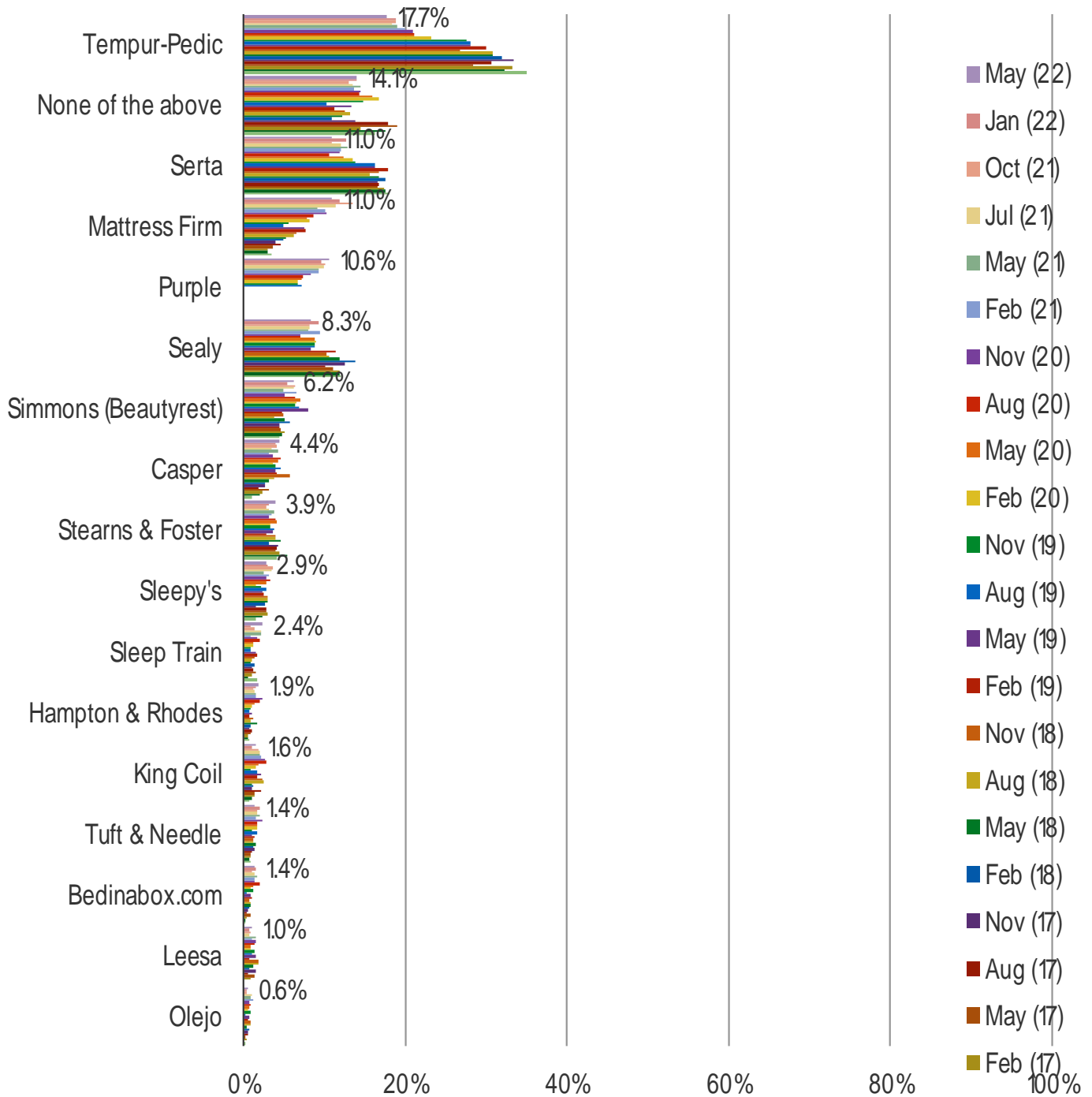
AWARENESS

Posed to all respondents



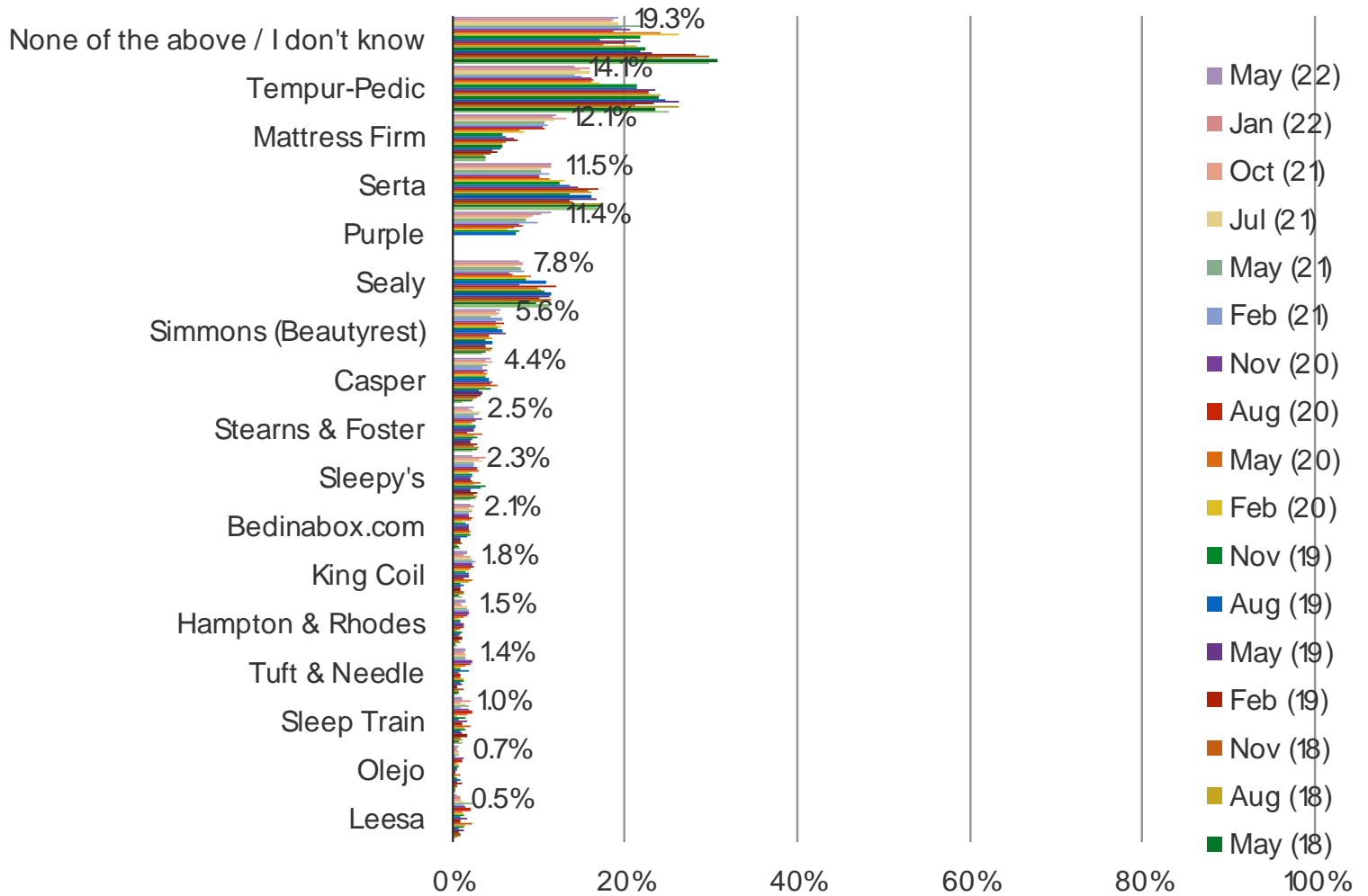
WHICH OF THE FOLLOWING MATTRESSES DO YOU THINK IS BEST?

Posed to all respondents



IF YOU WERE BUYING A MATTRESS TODAY, WHICH WOULD YOU BE MOST LIKELY TO BUY?

Posed to all respondents



FROM PREVIOUS PAGE, WHY DID YOU SELECT THAT BRAND?

Posed to all respondents

