

BESPOKE SURVEYS

Mattresses and Furniture Vol 25

1,000+ Consumers Per Wave



CHECK BREAKDOWN:

FURNITURE TRENDS

The percentage of consumers who said they moved in the past six months dropped sequentially (continuing a recent trend). The percentage of consumers who plan to move in the next six months is unchanged q/q (down from series highs reached in 2021 and generally in-line with levels we were seeing in 2018 and onward). Self-reported furniture purchases are mostly unchanged relative to our data in May – which was a bit lower than pandemic peaks, but still above pre-pandemic activity.

LUXURY FURNITURE DEMAND

Consumer interest in luxury furniture has softened q/q, both among the broader consumer audience and among higher income respondents (\$100k+). “Inflation” is the top reason respondents mentioned when asked why their interest in luxury furniture is lower than normal at the moment. When asked which brand consumers would shop today if they needed furniture, lower cost brands like Ashley and Ikea gained ground while a more expensive brand like RH softened a bit relative to results in May of this year.

FURNITURE BRANDS

Consumers have been increasingly likely over time to say they prefer buying furniture online. While the data jumped higher during the pandemic, we have seen some sequential regression in recent quarters since the peak of online preference.

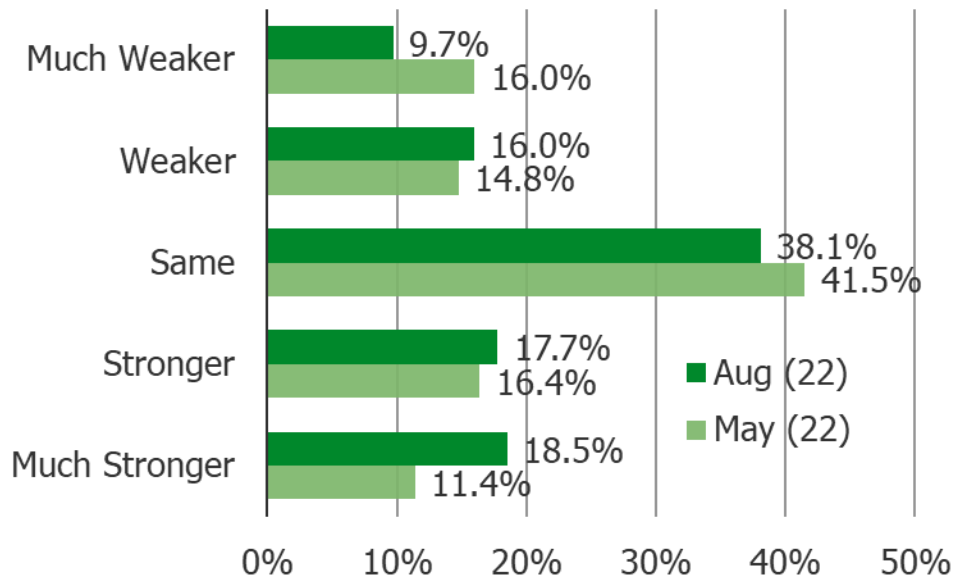
ONLINE MATTRESSES

Mattress purchase engagement and expectations are mostly in-line with prior waves. Consumers continue to shift in their preferences away from inner spring and toward memory foam and hybrid mattresses. The share of consumers who have purchased a mattress online has grown over time, though this metric has been flatter of late. Satisfaction with mattresses bought online (“bed in a box”) is positive and has held up over time. All told, consumer likelihood of buying a mattress online, if they needed one, has trended higher throughout our survey’s history but has regressed from pandemic highs.

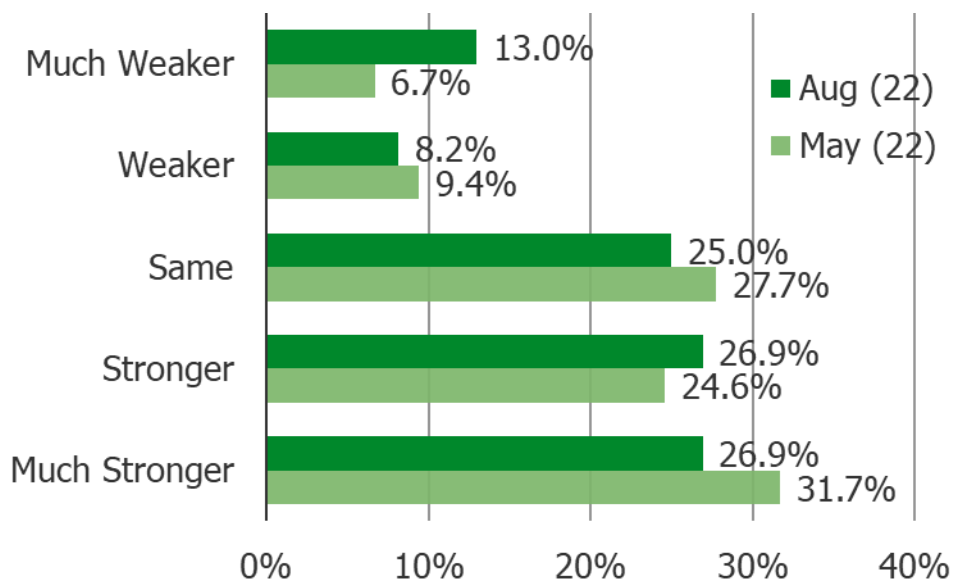
LUXURY FURNITURE DEMAND AND FURNITURE BRANDS

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)



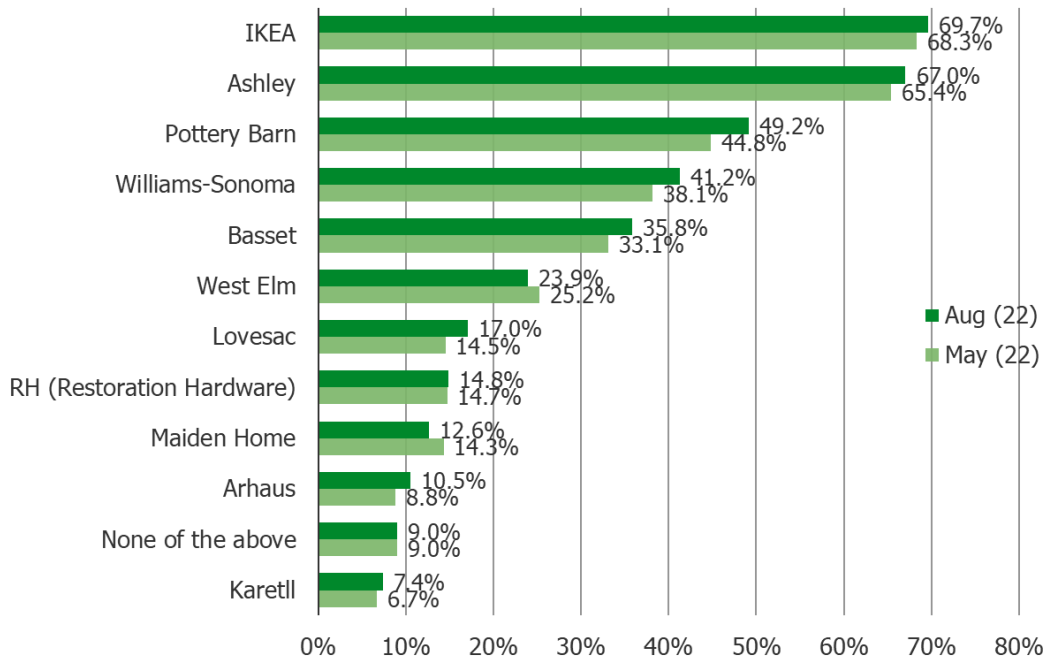
RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS WEAKER THAN NORMAL – WHY?

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

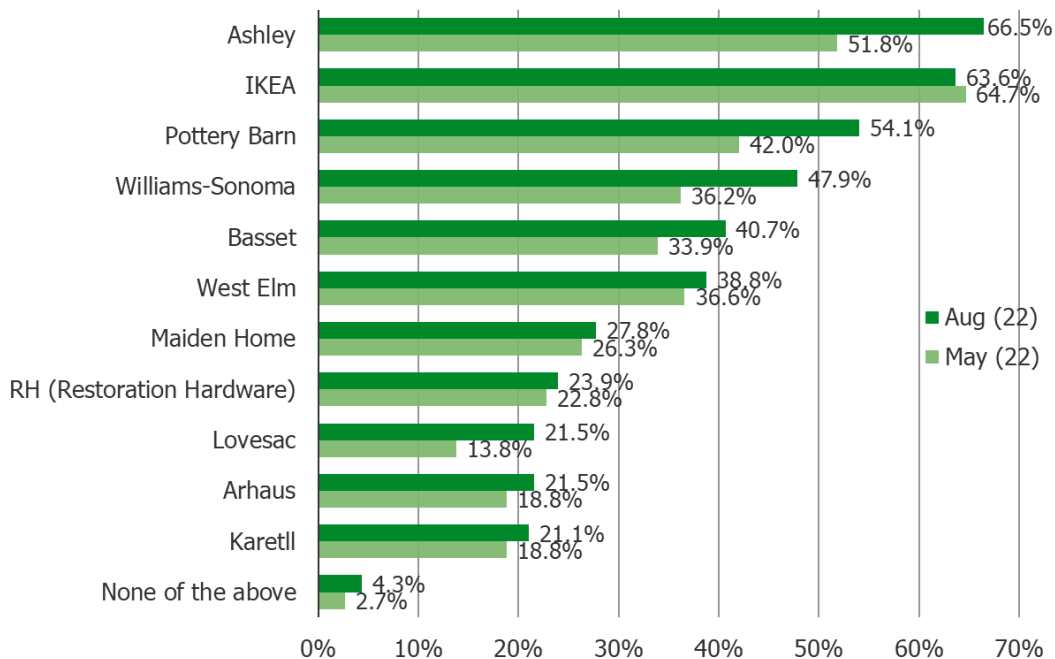


ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

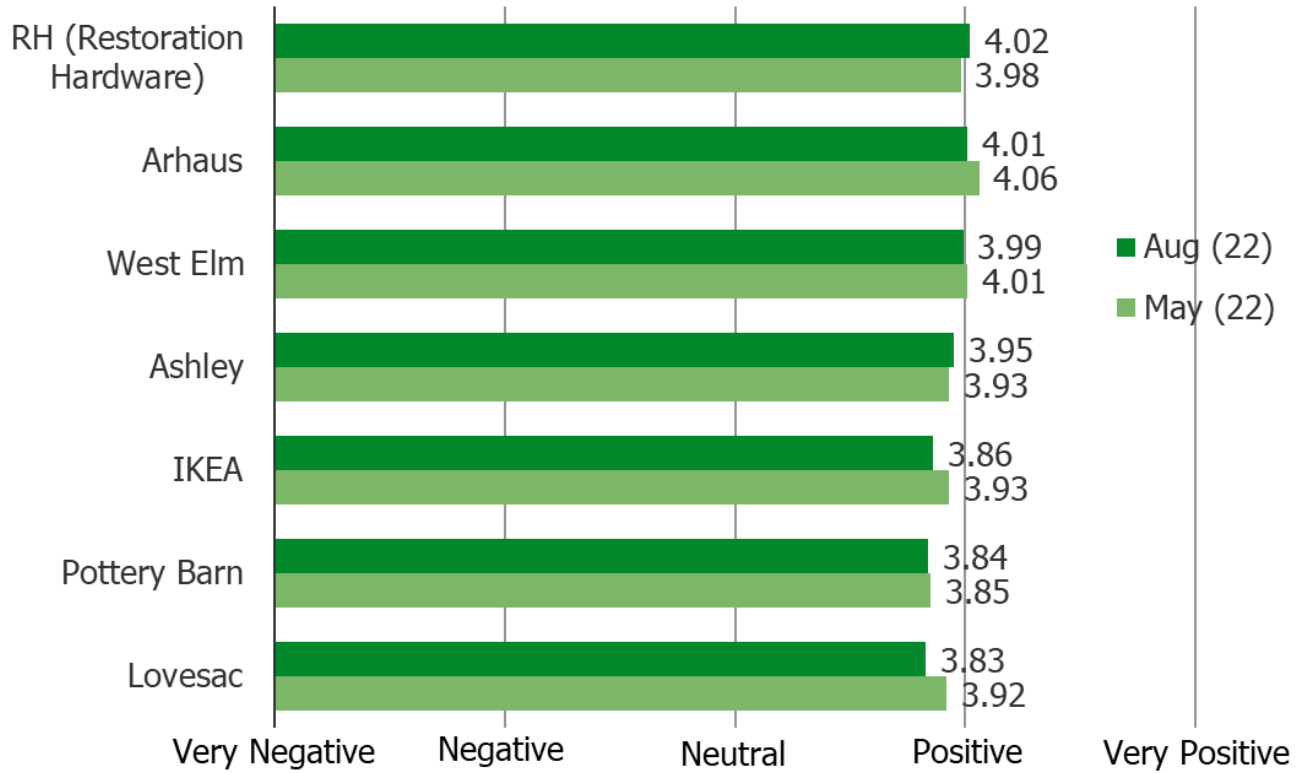


Posed to respondents with household incomes of \$100k and above (N = 224)



WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

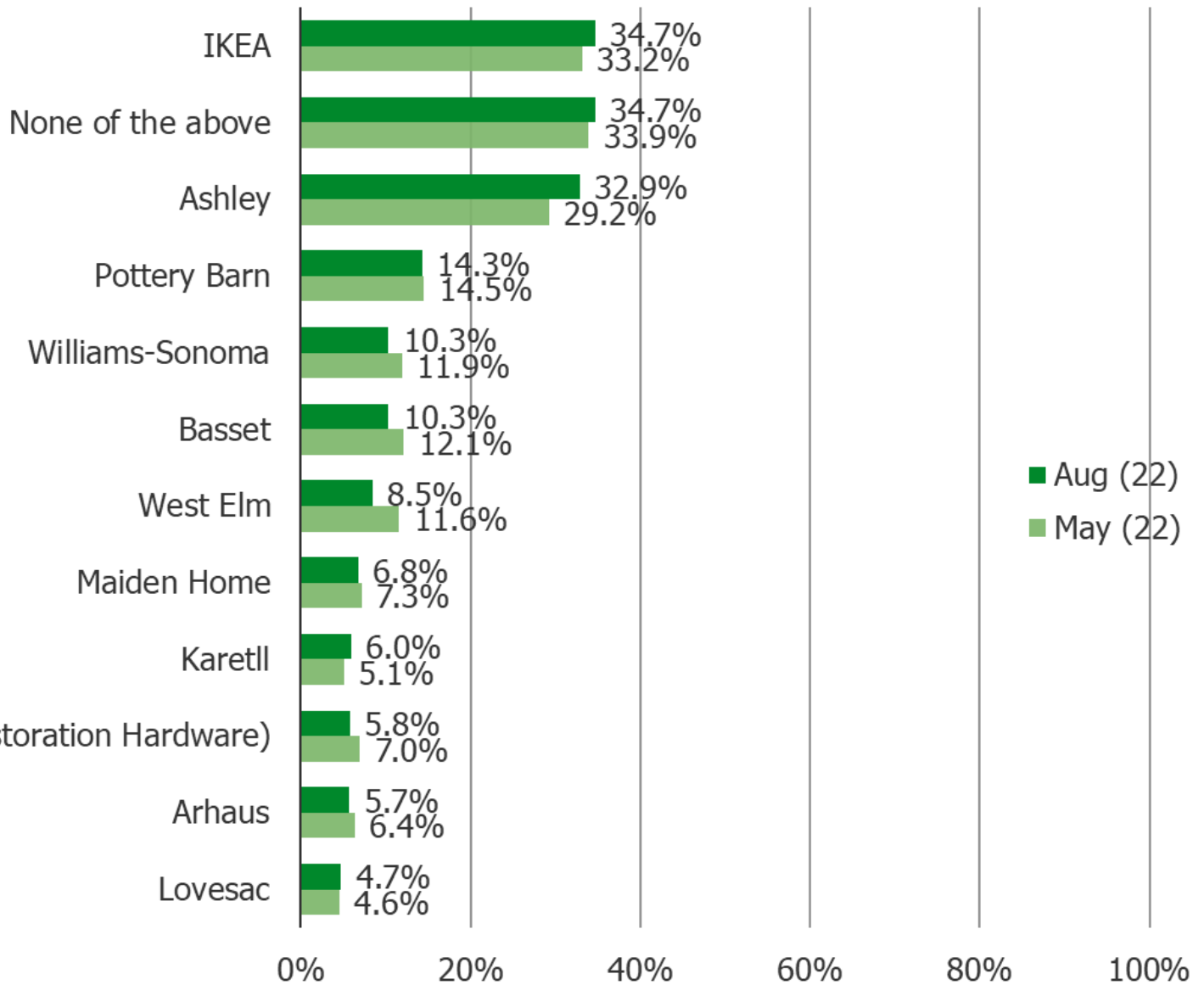
Posed to respondents who are familiar with each of the following.



	N =
IKEA	691
Ashley	665
Pottery Barn	488
West Elm	237
Lovesac	169
RH (Restoration Hardware)	147
Arhaus	104

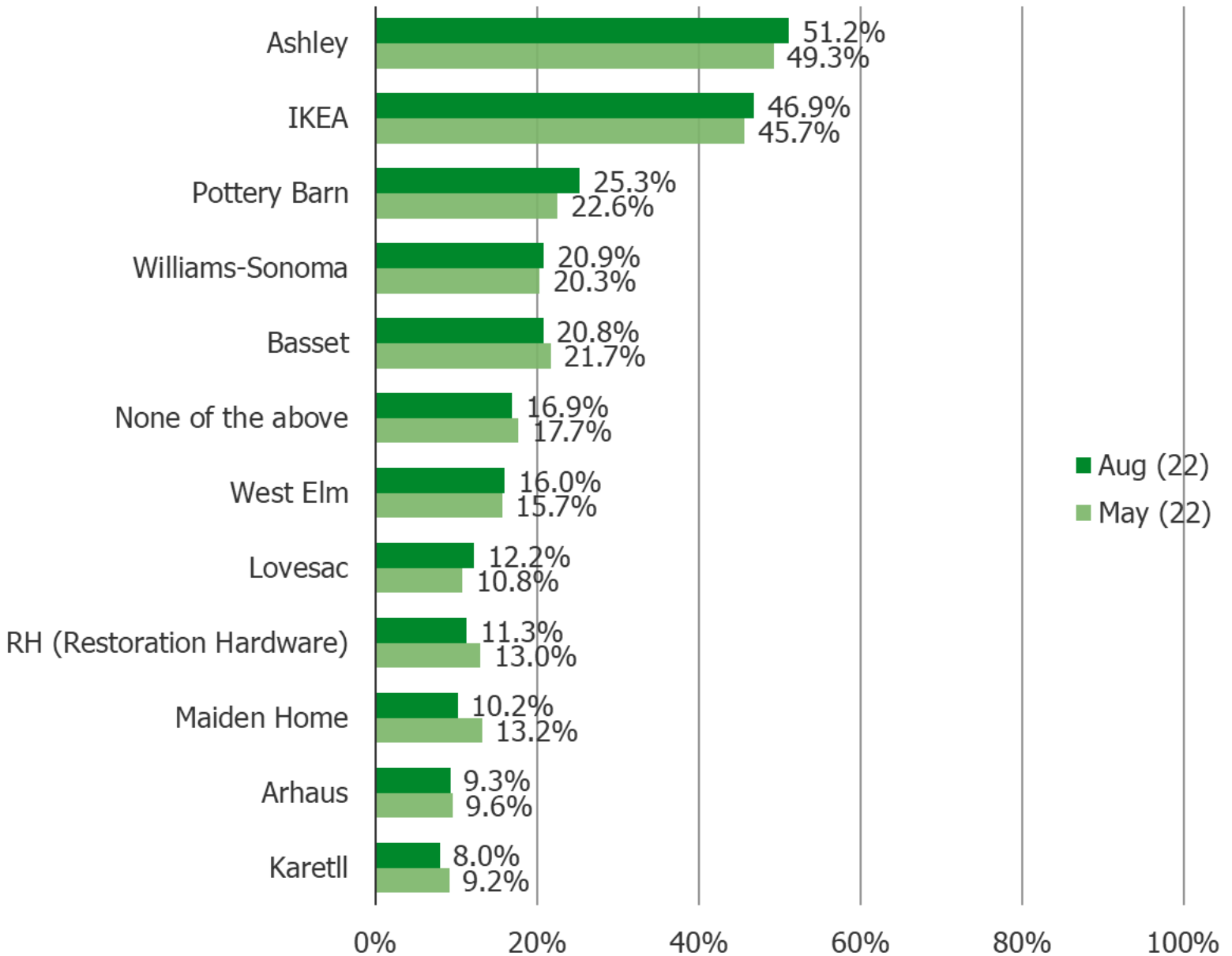
DO YOU OWN FURNITURE OR FURNISHINGS FROM ANY OF THE FOLLOWING BRANDS? (SELECT ALL THAT APPLY)

Posed to all respondents.



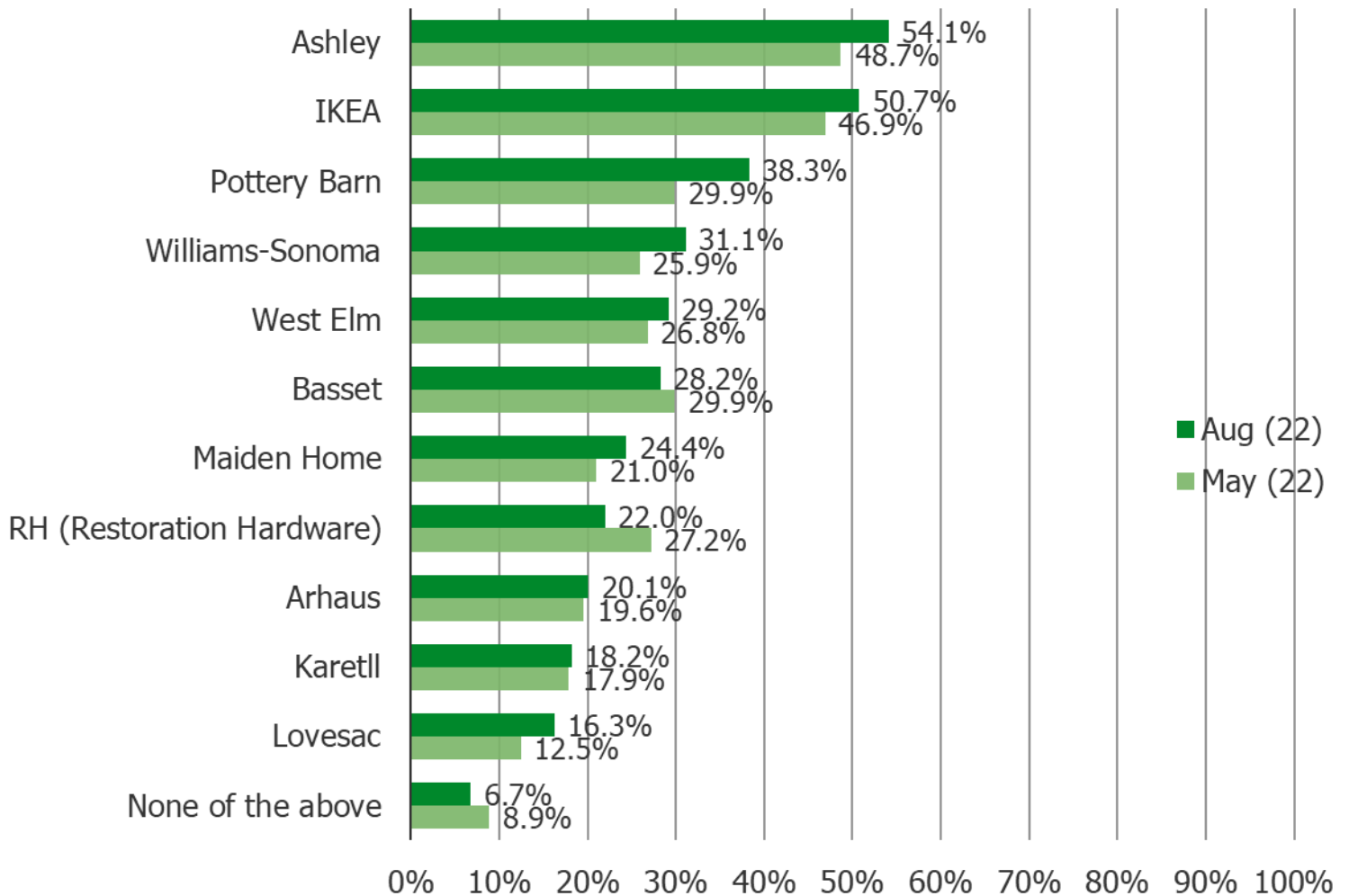
IF YOU WERE SHOPPING FOR FURNITURE TODAY, WOULD YOU INCLUDE ANY OF THE FOLLOWING IN YOUR SHOPPING PROCESS? (SELECT ALL THAT APPLY)

Posed to all respondents.



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

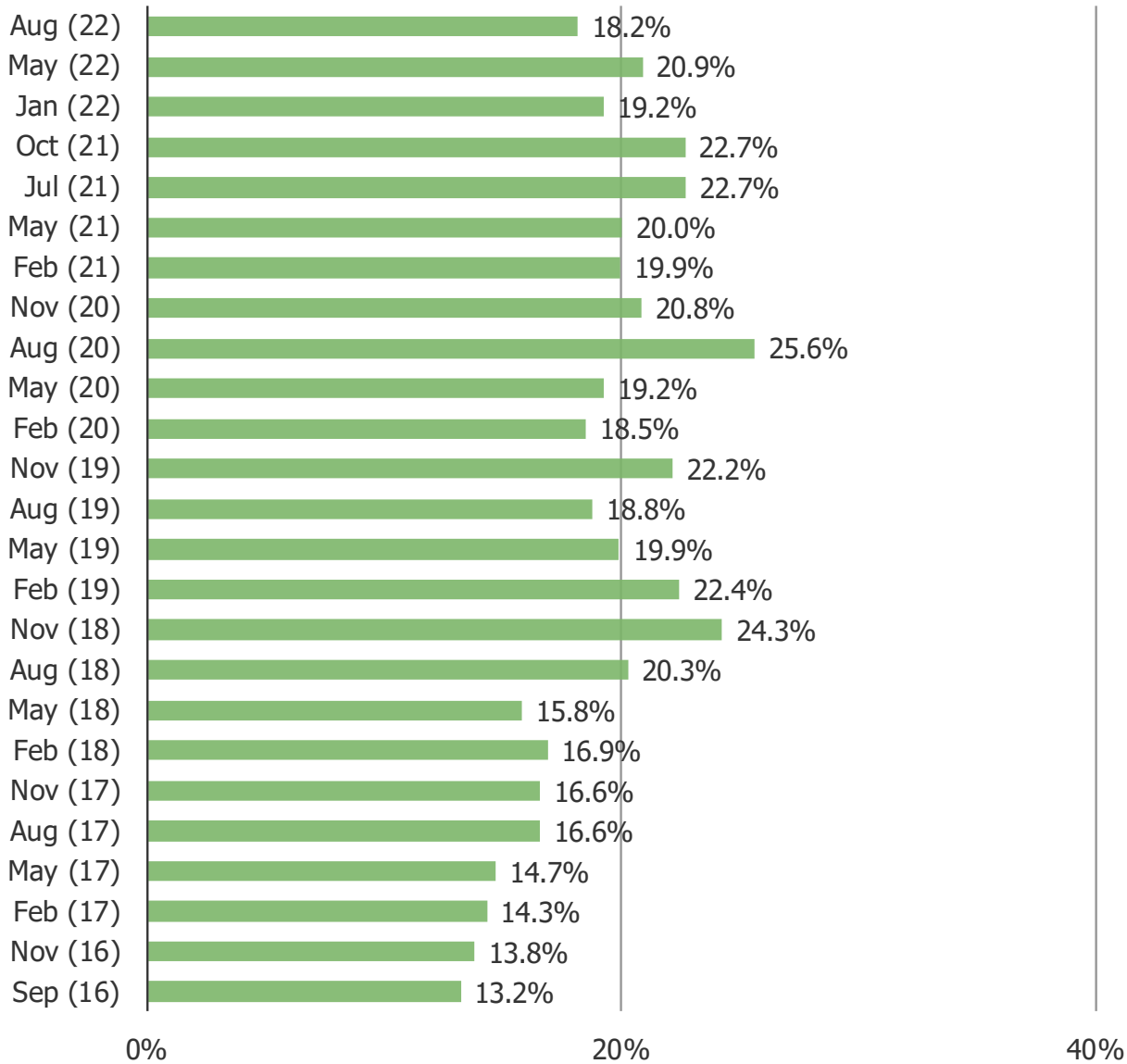
Posed to respondents with household incomes of \$100k and above (N = 209)



FURNITURE PURCHASING TRENDS

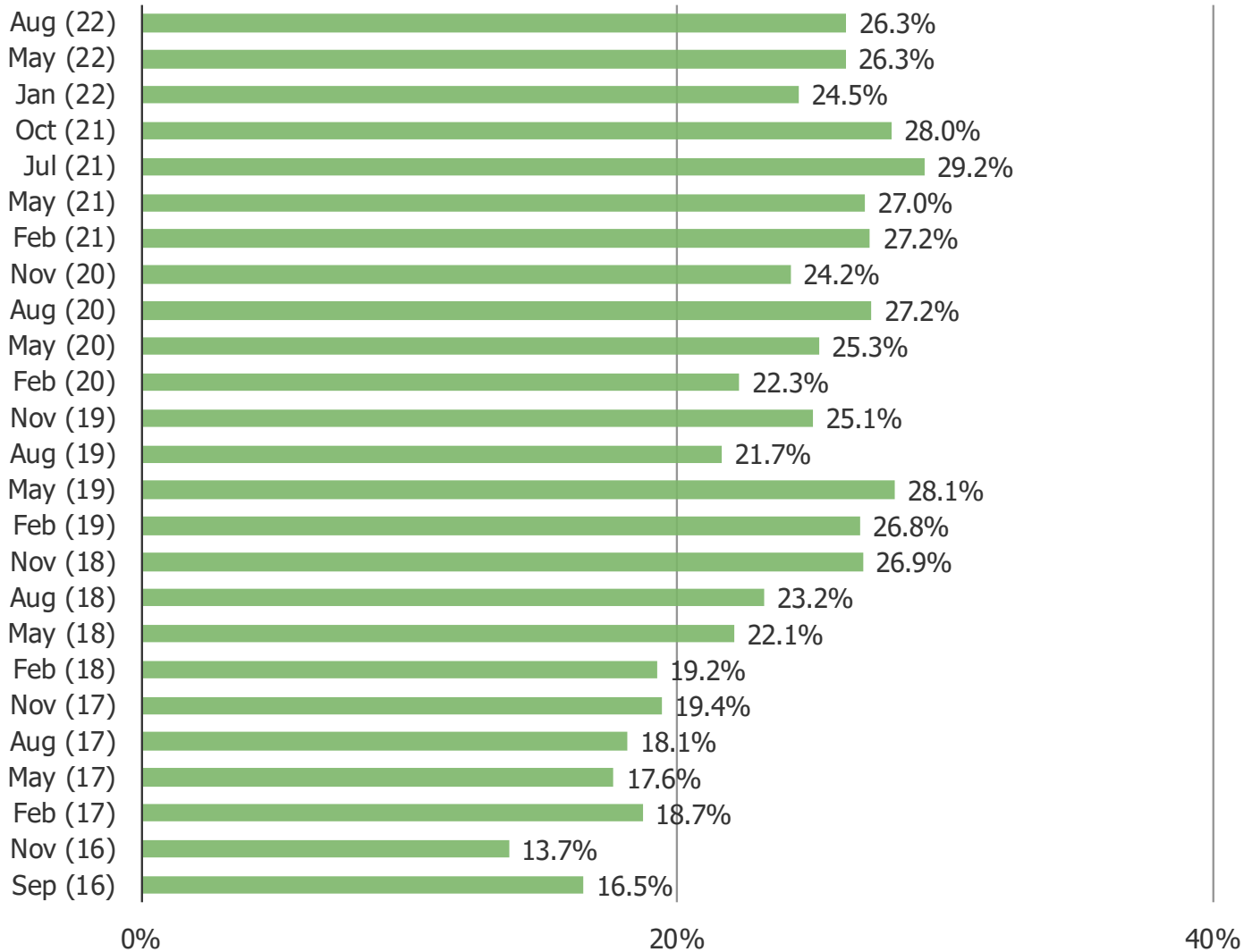
HAVE YOU MOVED IN THE PAST SIX MONTHS?

Posed to all respondents



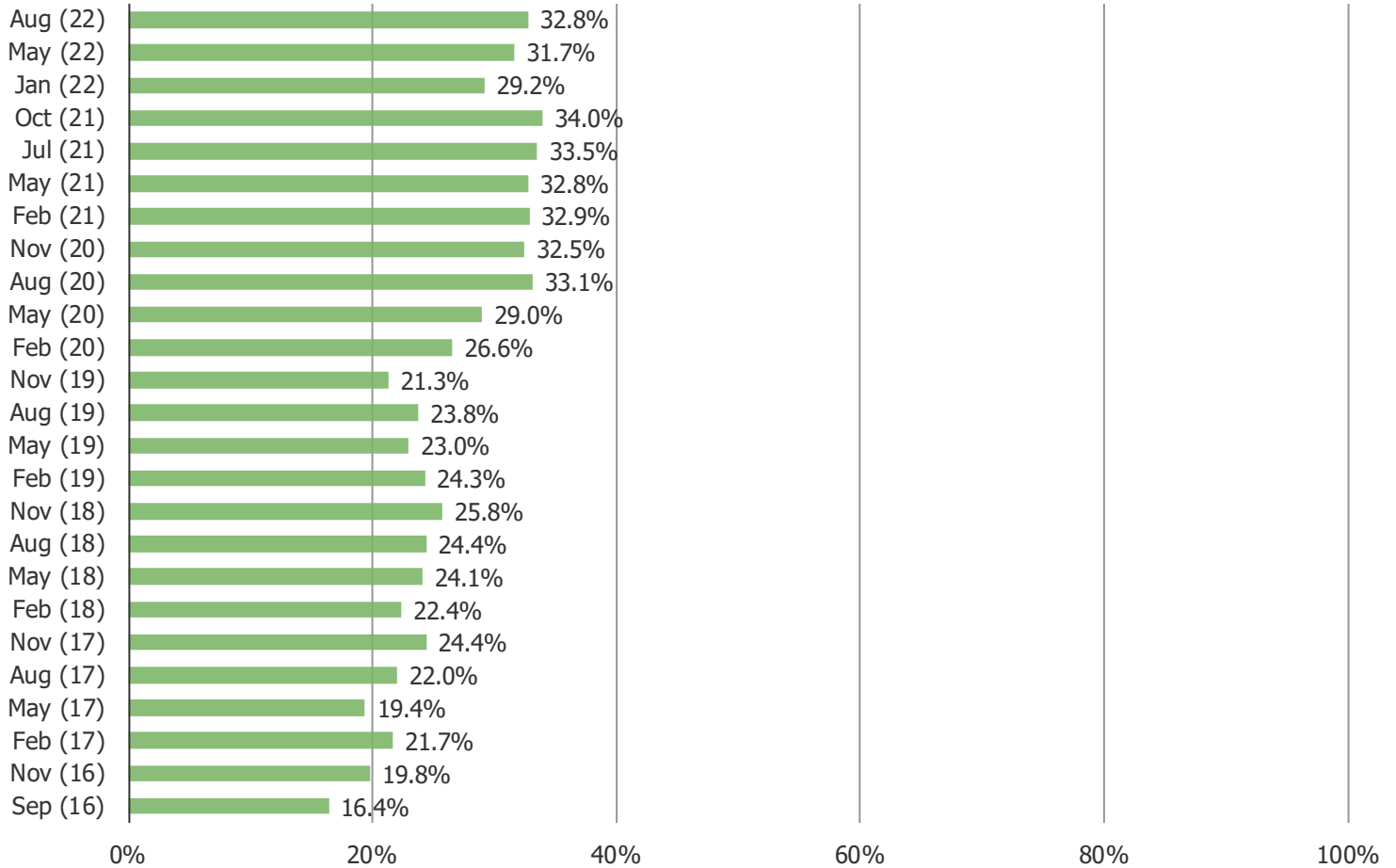
DO YOU PLAN TO MOVE IN THE NEXT SIX MONTHS?

Posed to all respondents



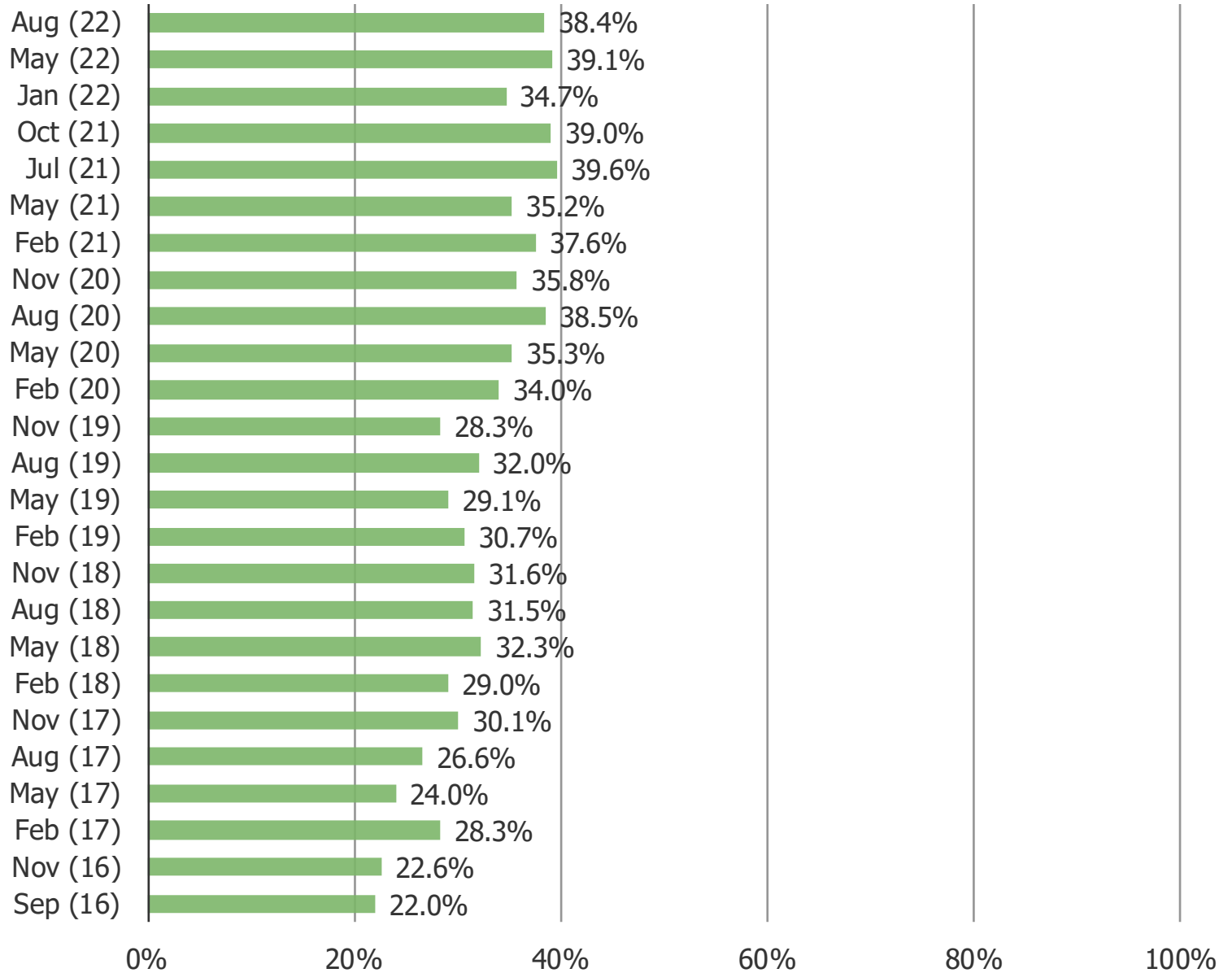
HAVE YOU RENOVATED OR REMODELED YOUR HOME IN THE PAST SIX MONTHS?

Posed to all respondents



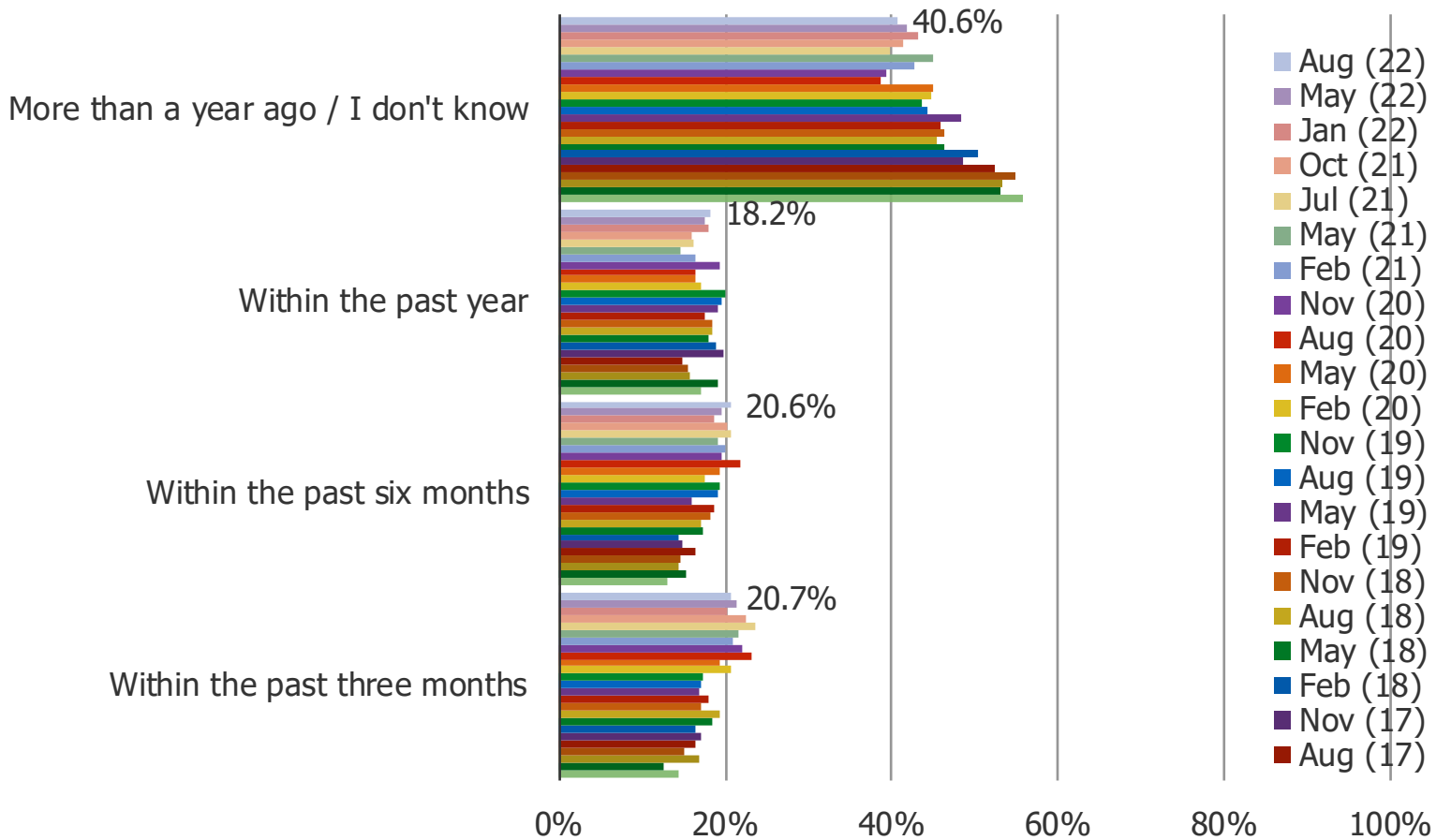
DO YOU PLAN TO RENOVATE OR REMODEL YOUR HOME IN THE NEXT FEW MONTHS?

Posed to all respondents



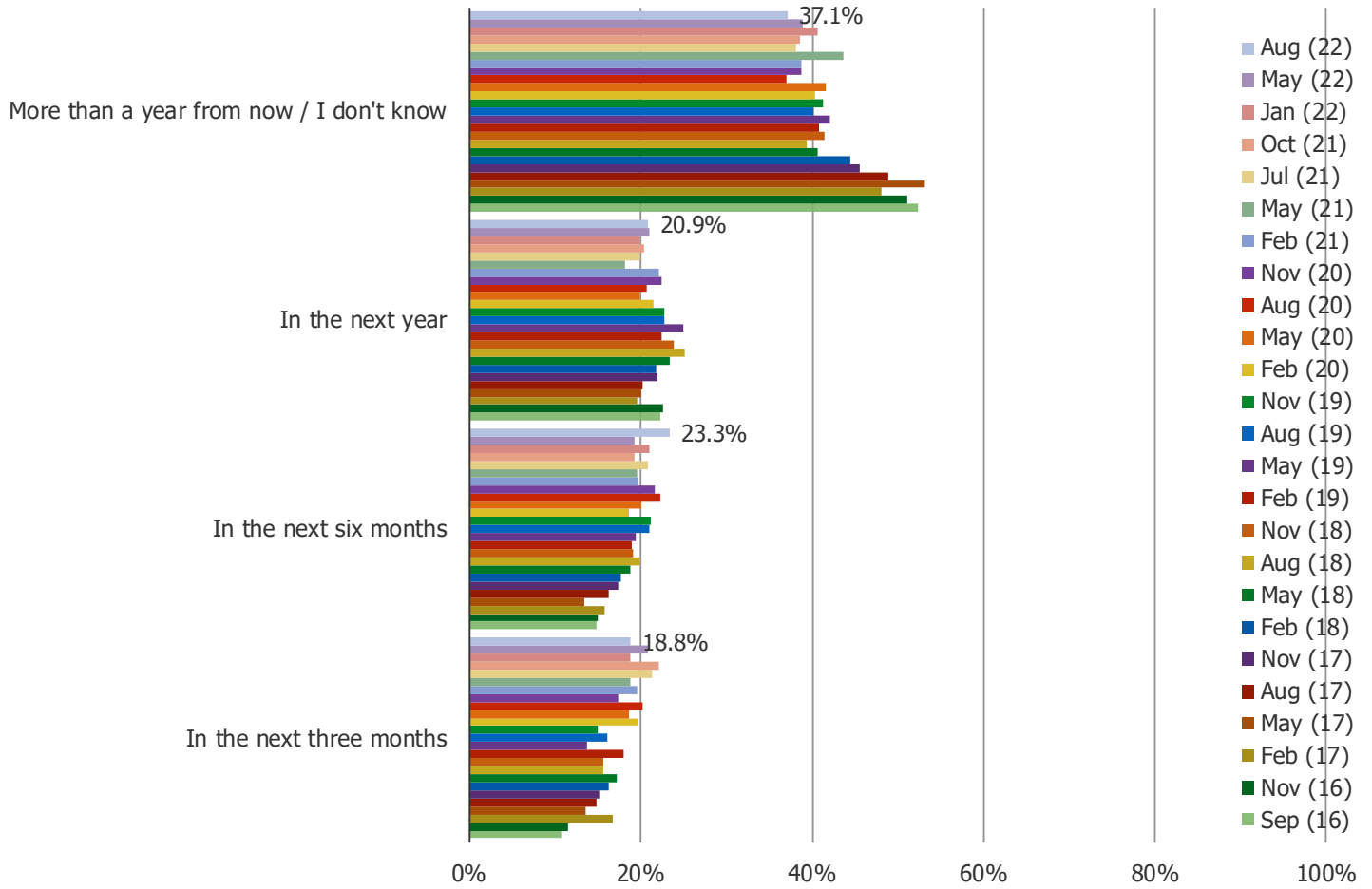
WHEN IS THE LAST TIME YOU PURCHASED FURNITURE FOR YOUR HOME?

Posed to all respondents



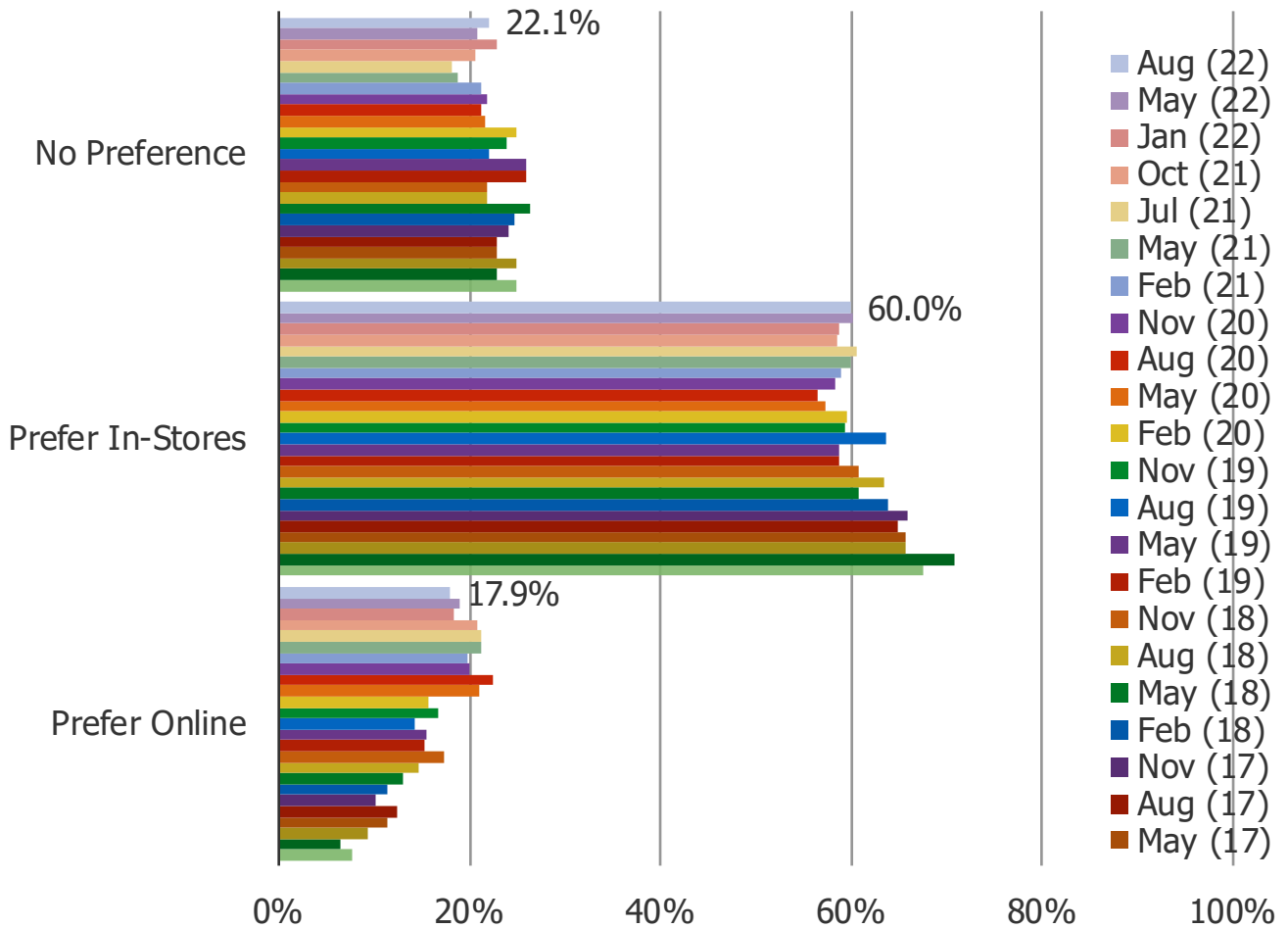
WHEN DO YOU EXPECT TO BUY FURNITURE FOR YOUR HOME NEXT?

Posed to all respondents



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

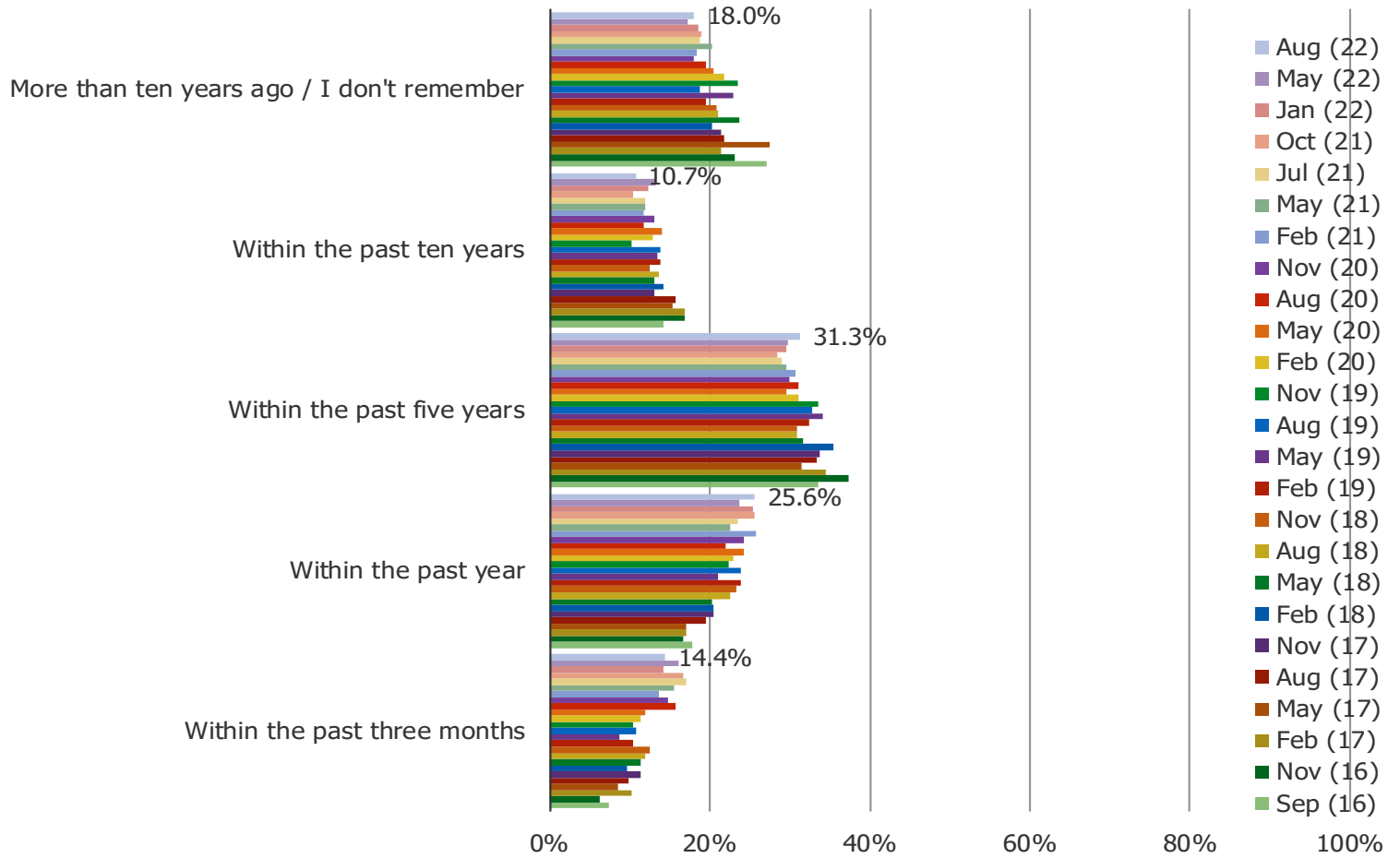
Posed to all respondents



MATTRESSES PURCHASE ACTIVITY

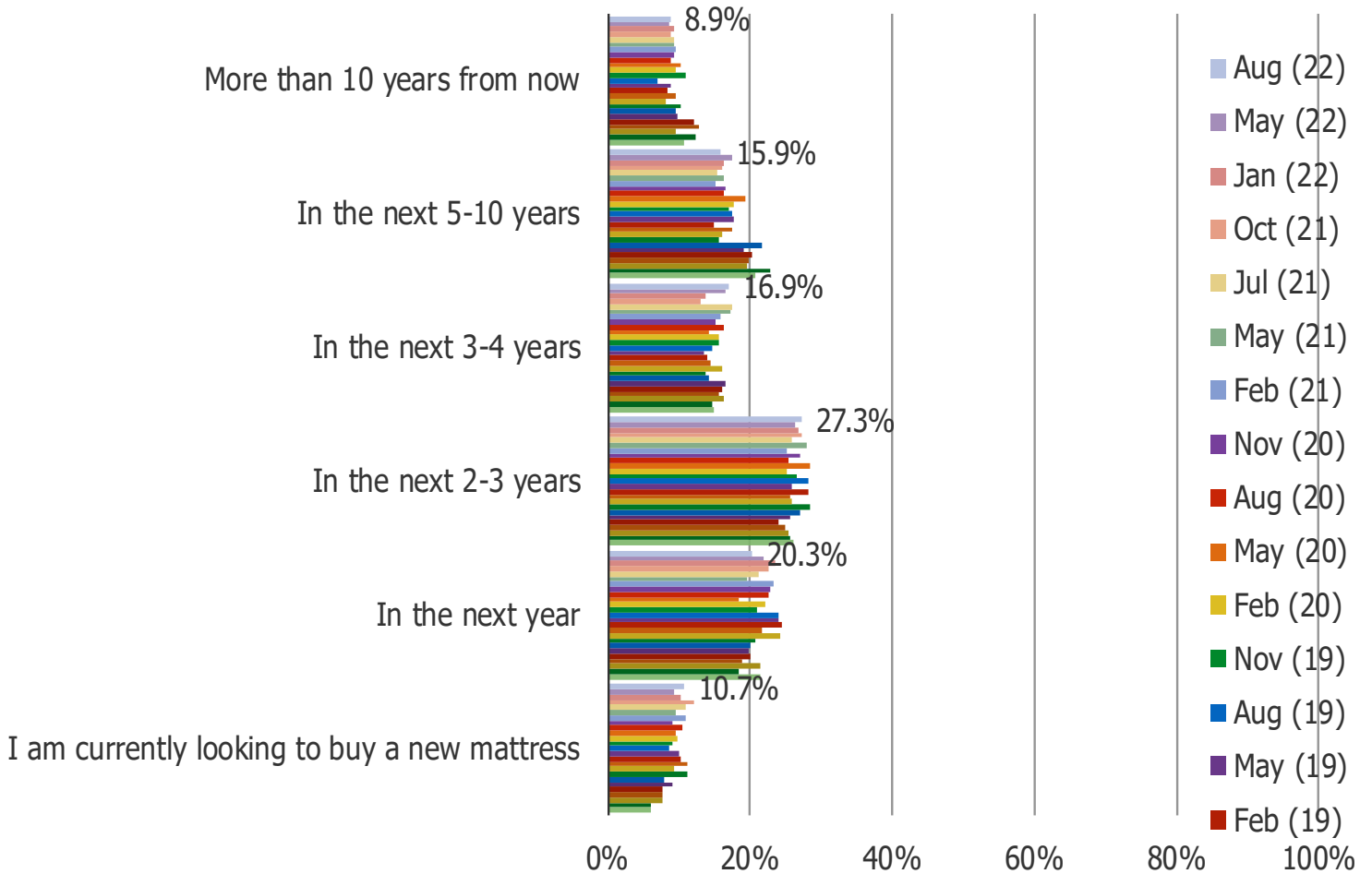
LAST TIME PURCHASED A MATTRESS

Posed to all respondents



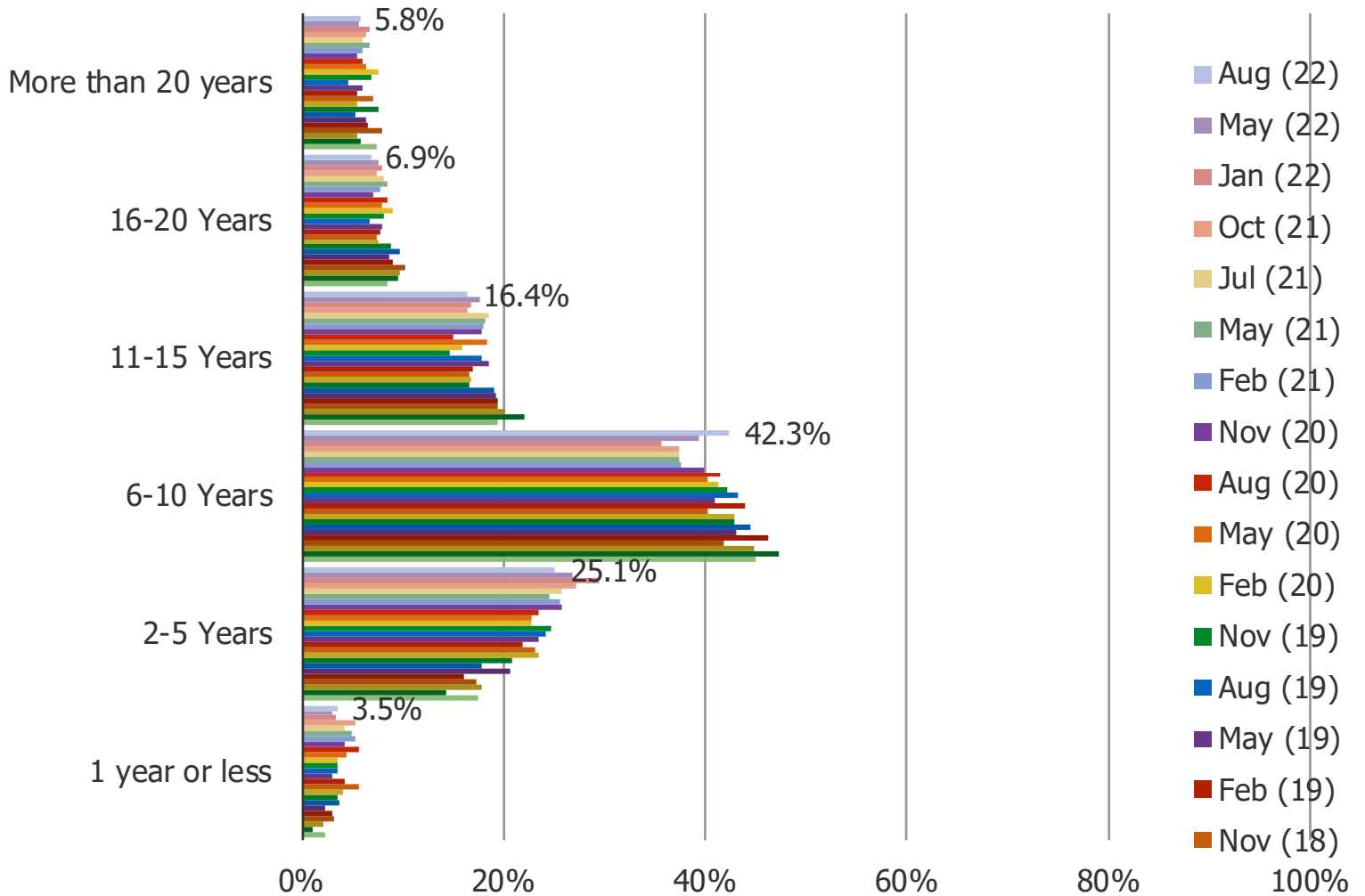
WHEN DO YOU EXPECT TO GET A NEW MATTRESS?

Posed to all respondents



HOW LONG DO YOU BELIEVE MATTRESSES SHOULD LAST?

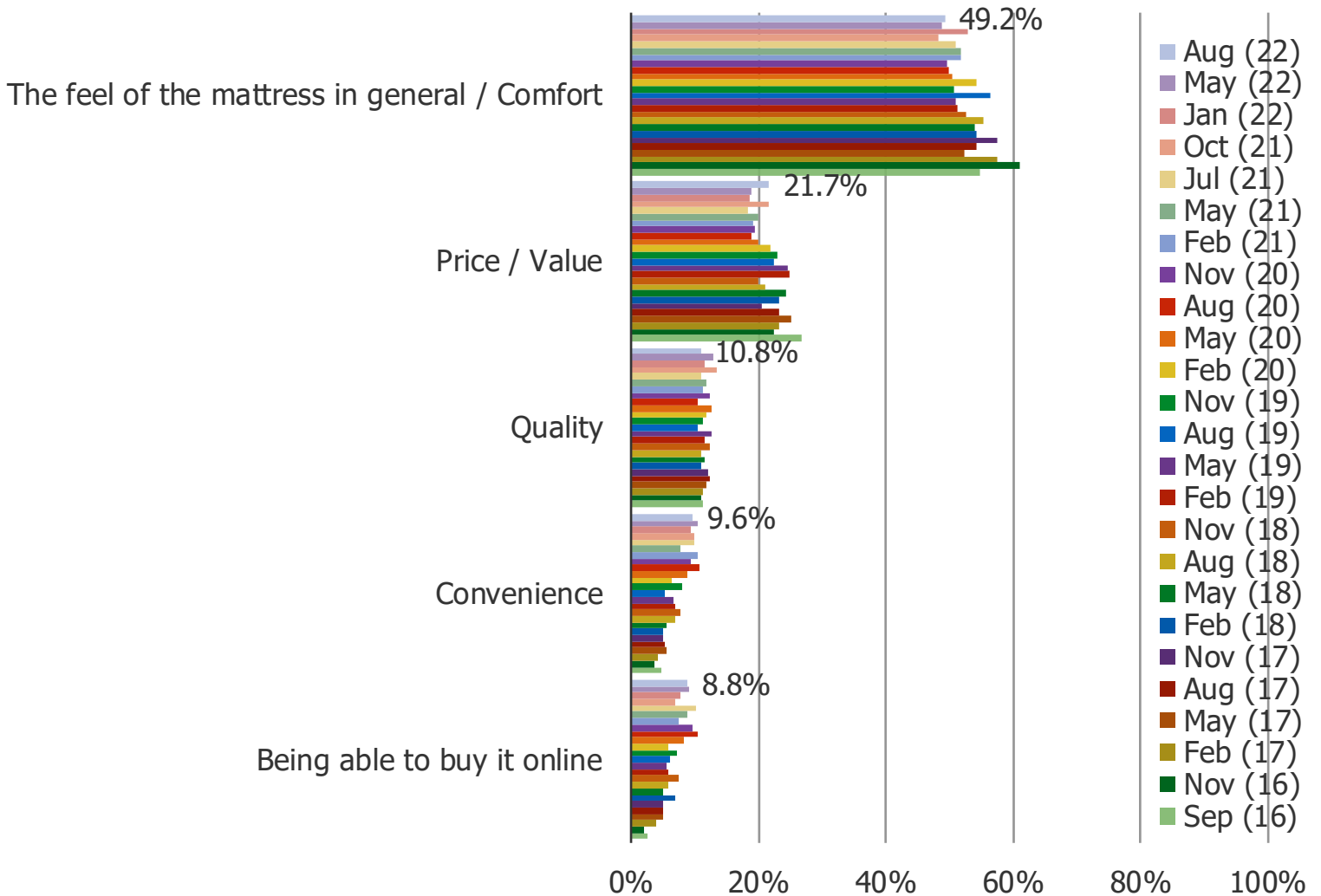
Posed to all respondents



CATALYSTS / DECISION DRIVERS

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

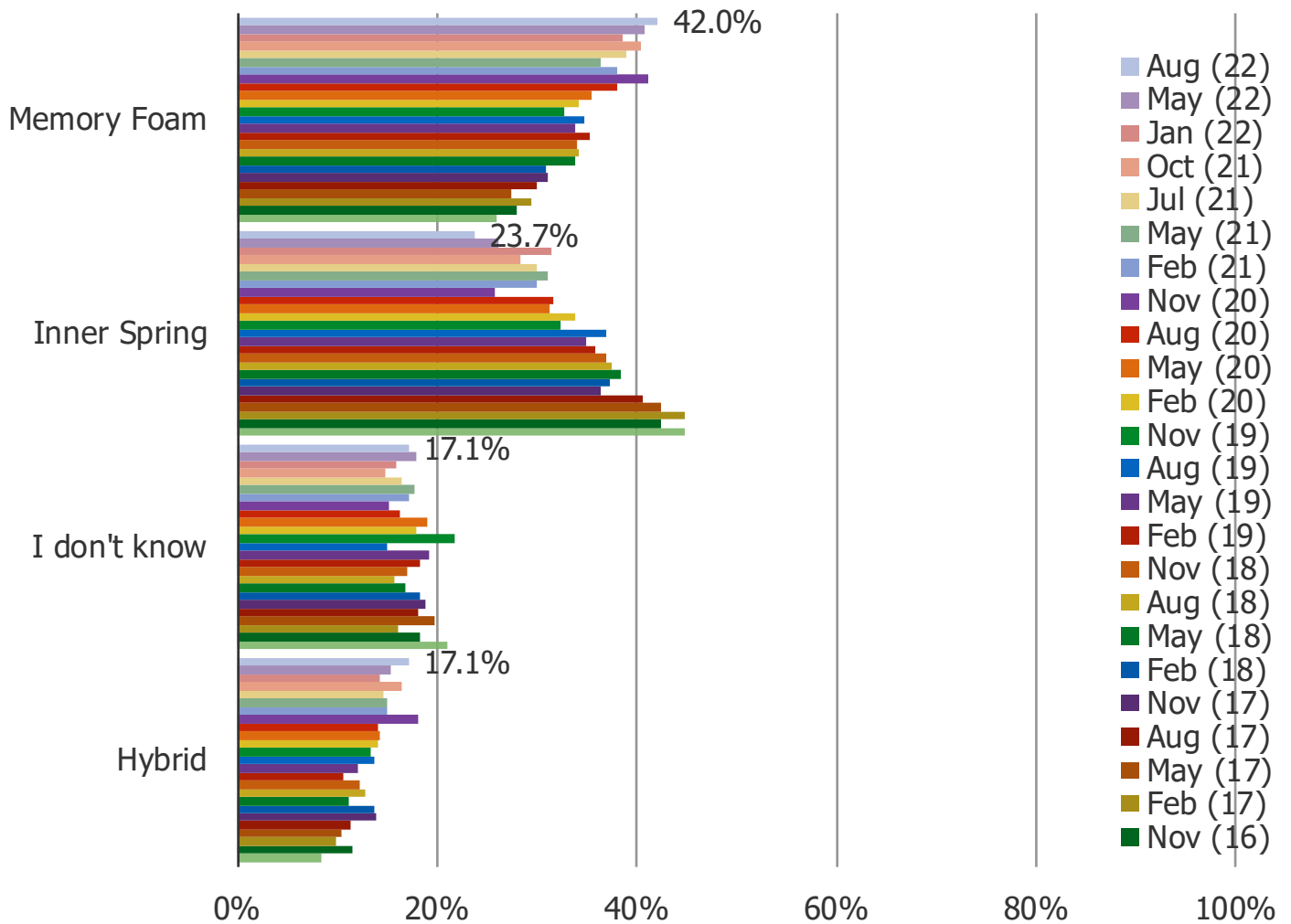
Posed to all respondents



MEMORY FOAM VS. INNER SPRING

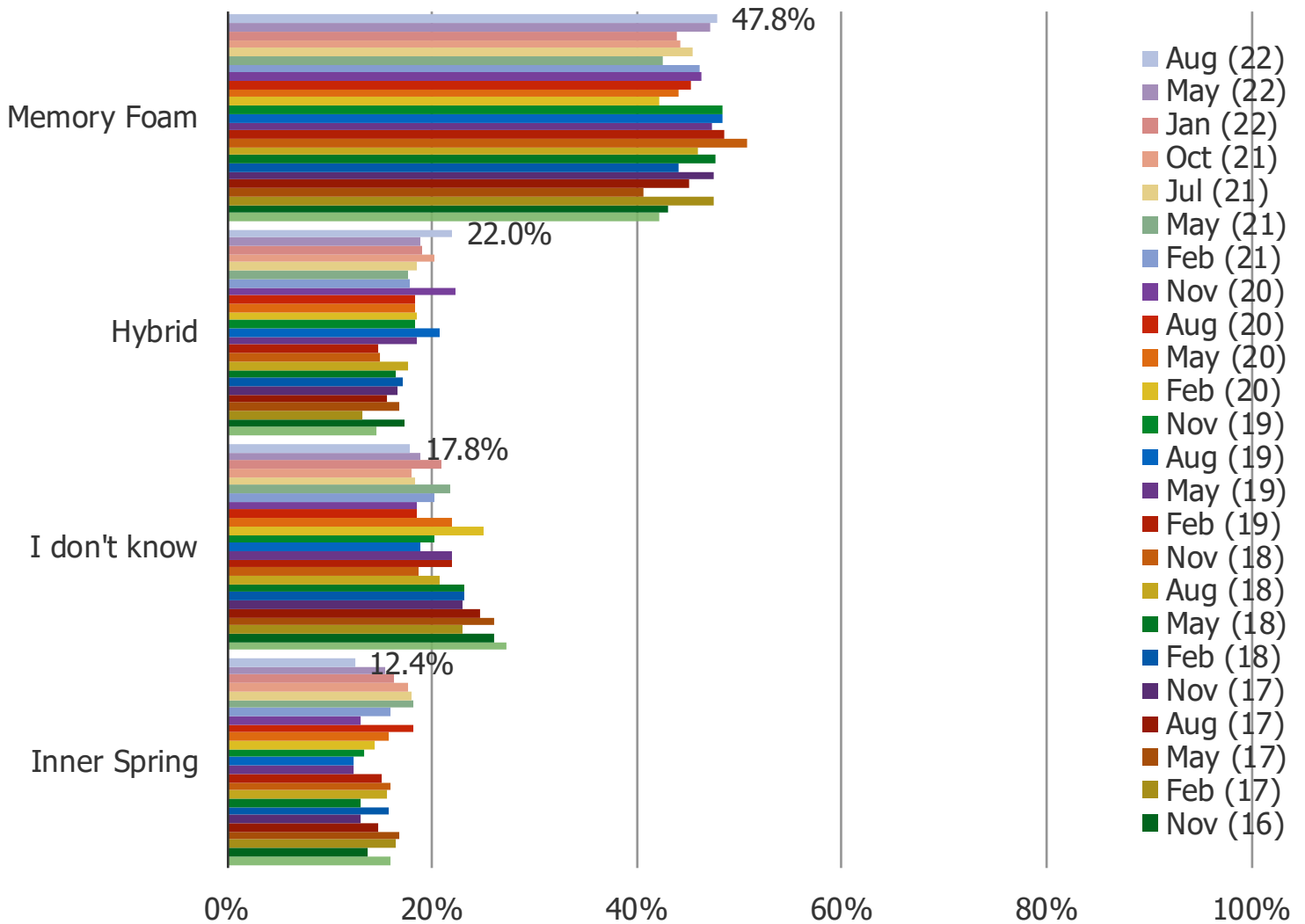
WHICH BEST DESCRIBES THE TYPE OF MATTRESS THAT YOU CURRENTLY SLEEP ON?

Posed to all respondents



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

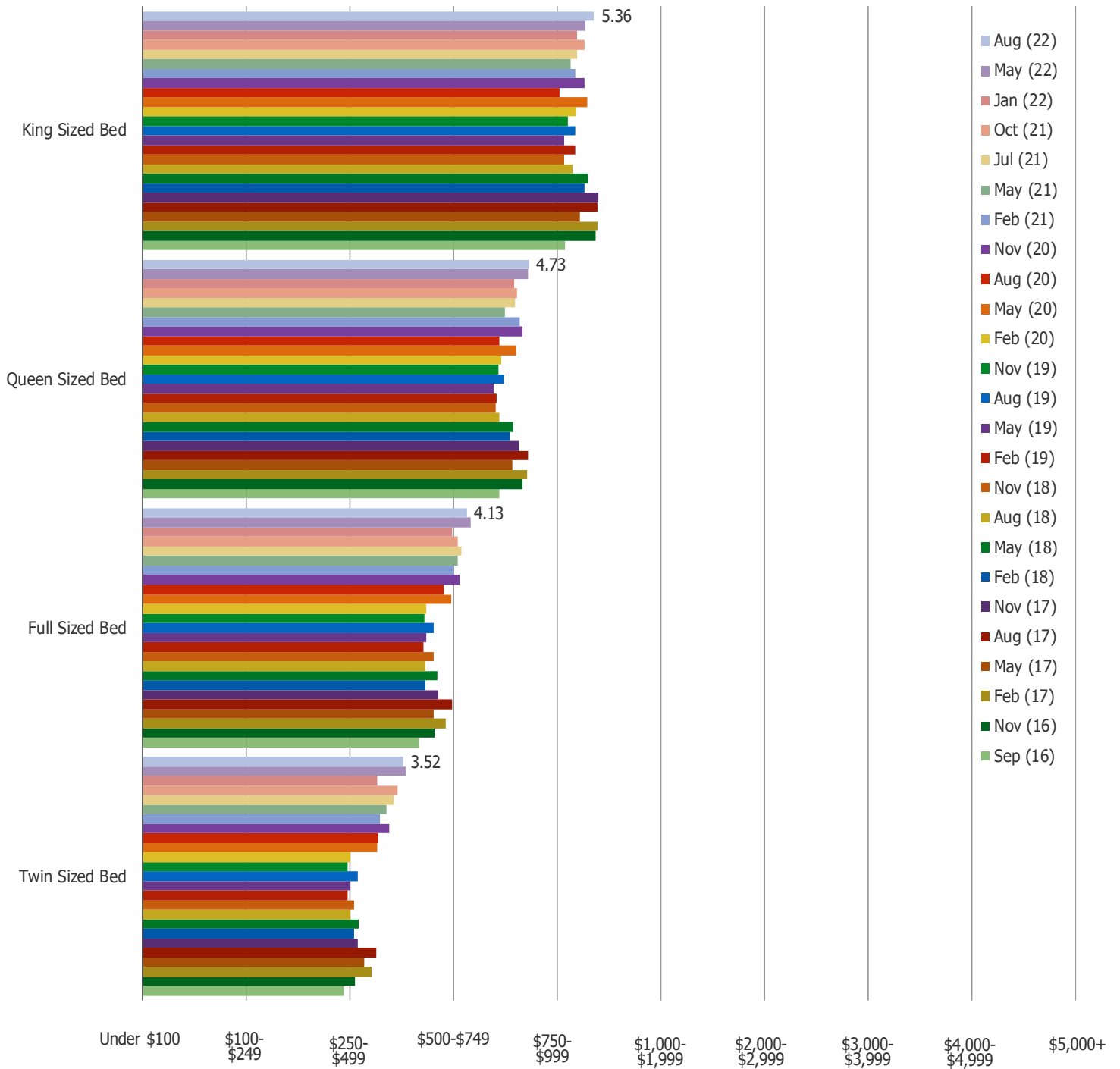
Posed to all respondents



PRICE EXPECTATIONS

EXPECTATIONS FOR SPENDING ON MATTRESSES BY SIZE

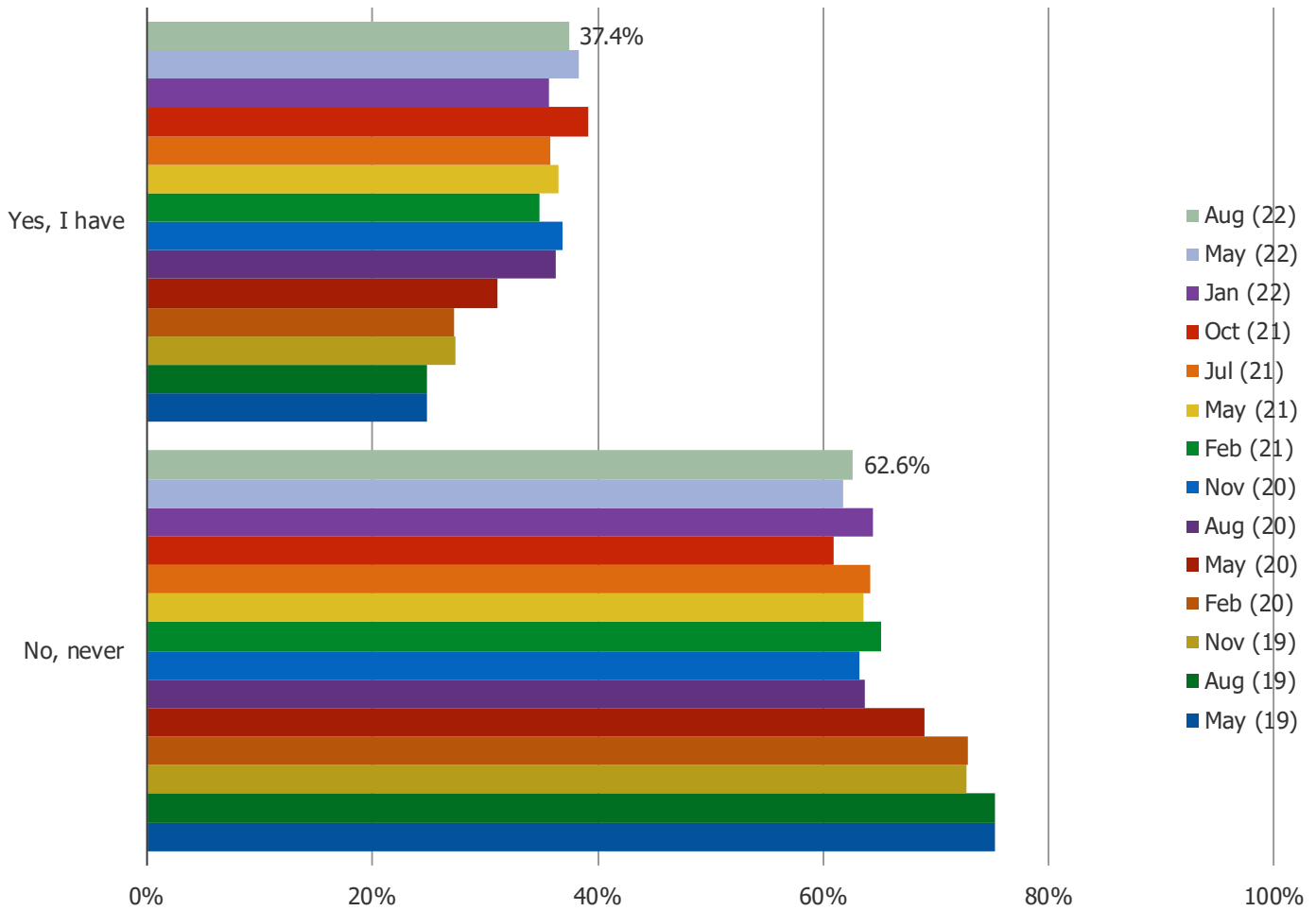
Posed to all respondents



IN-STORE VS. ONLINE

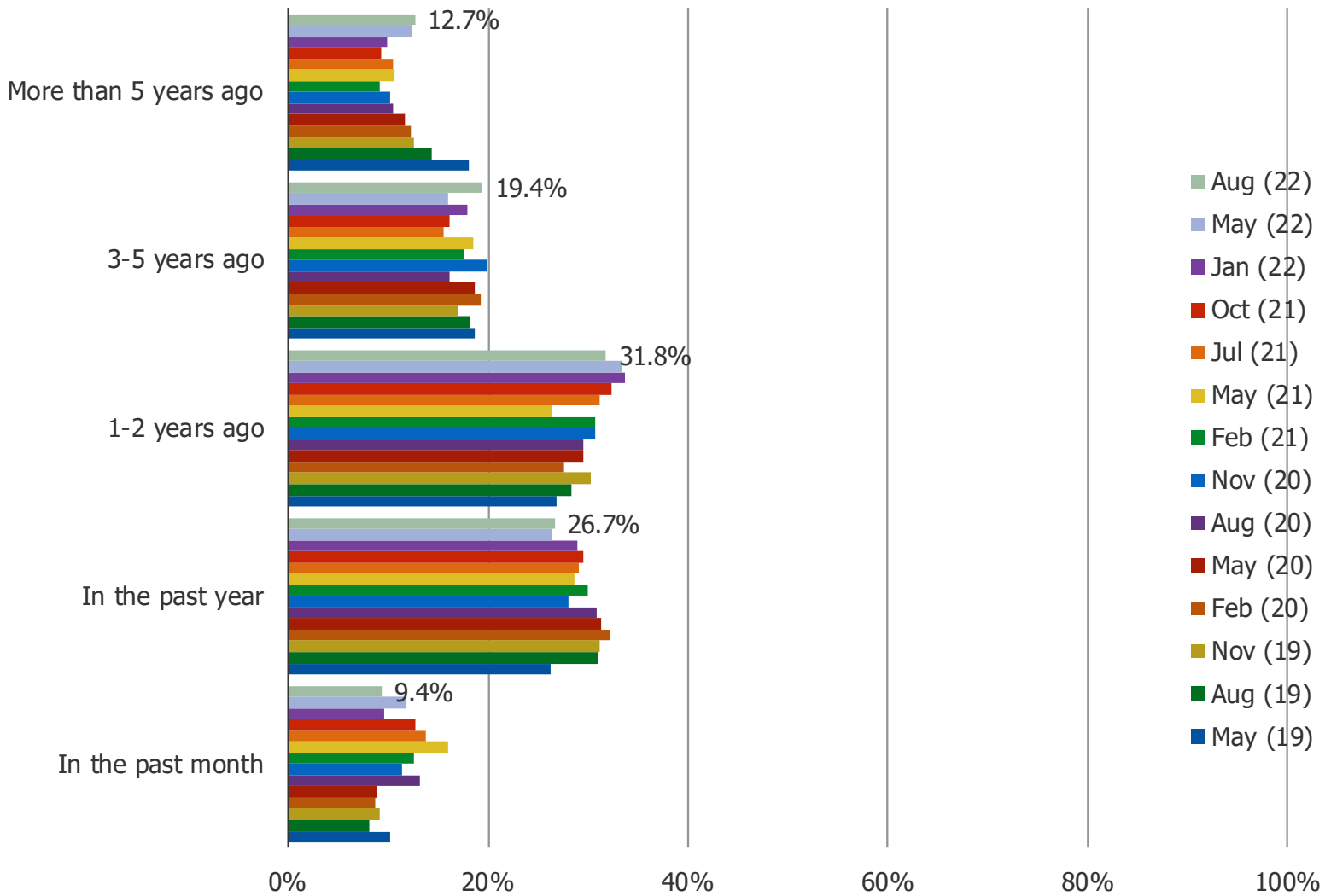
HAVE YOU EVER ORDERED A MATTRESS ONLINE? (IE. A BED-IN-A-BOX MATTRESS)

Posed to all respondents



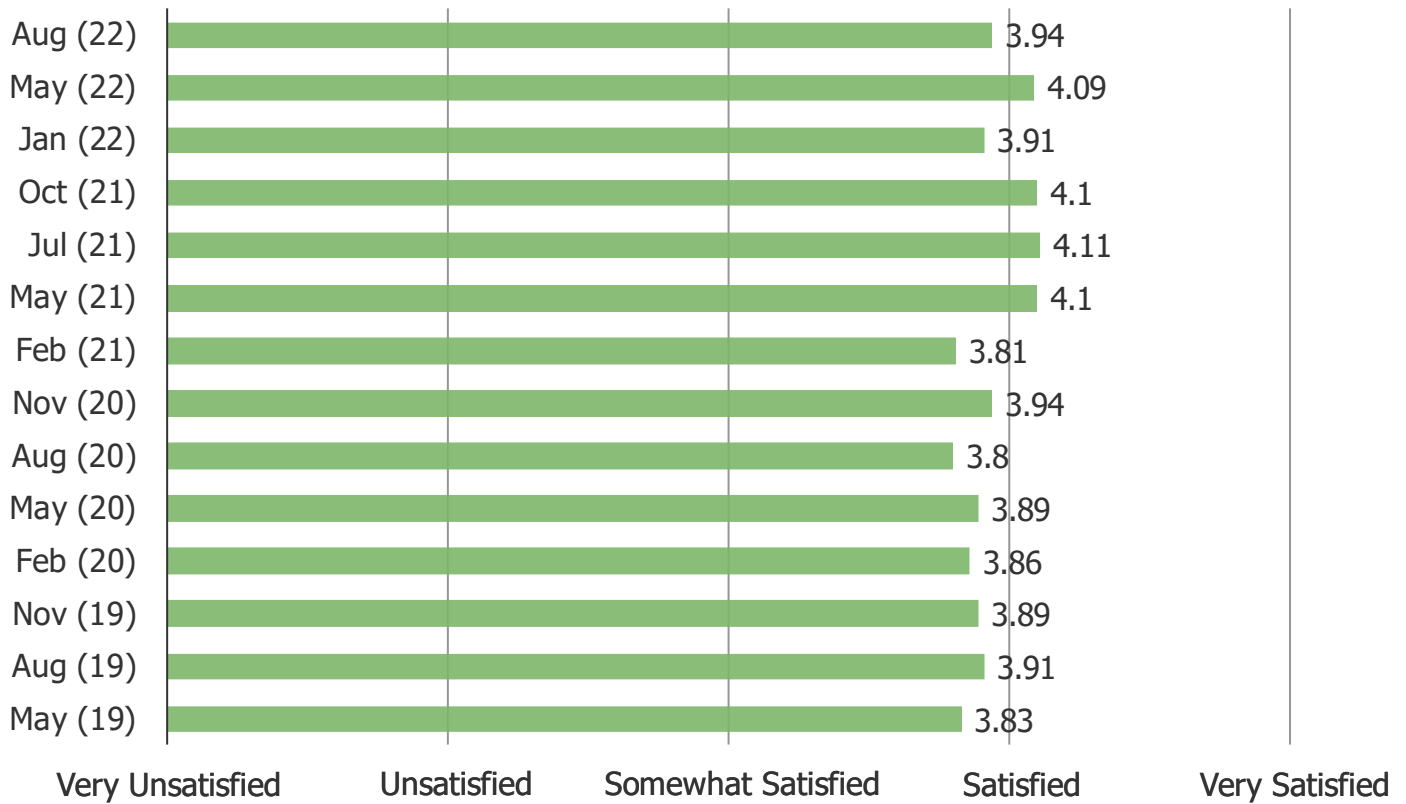
WHEN DID YOU MAKE YOUR MOST RECENT BED-IN-A-BOX ONLINE MATTRESS PURCHASE?

Posed to respondents who have ordered a mattress online



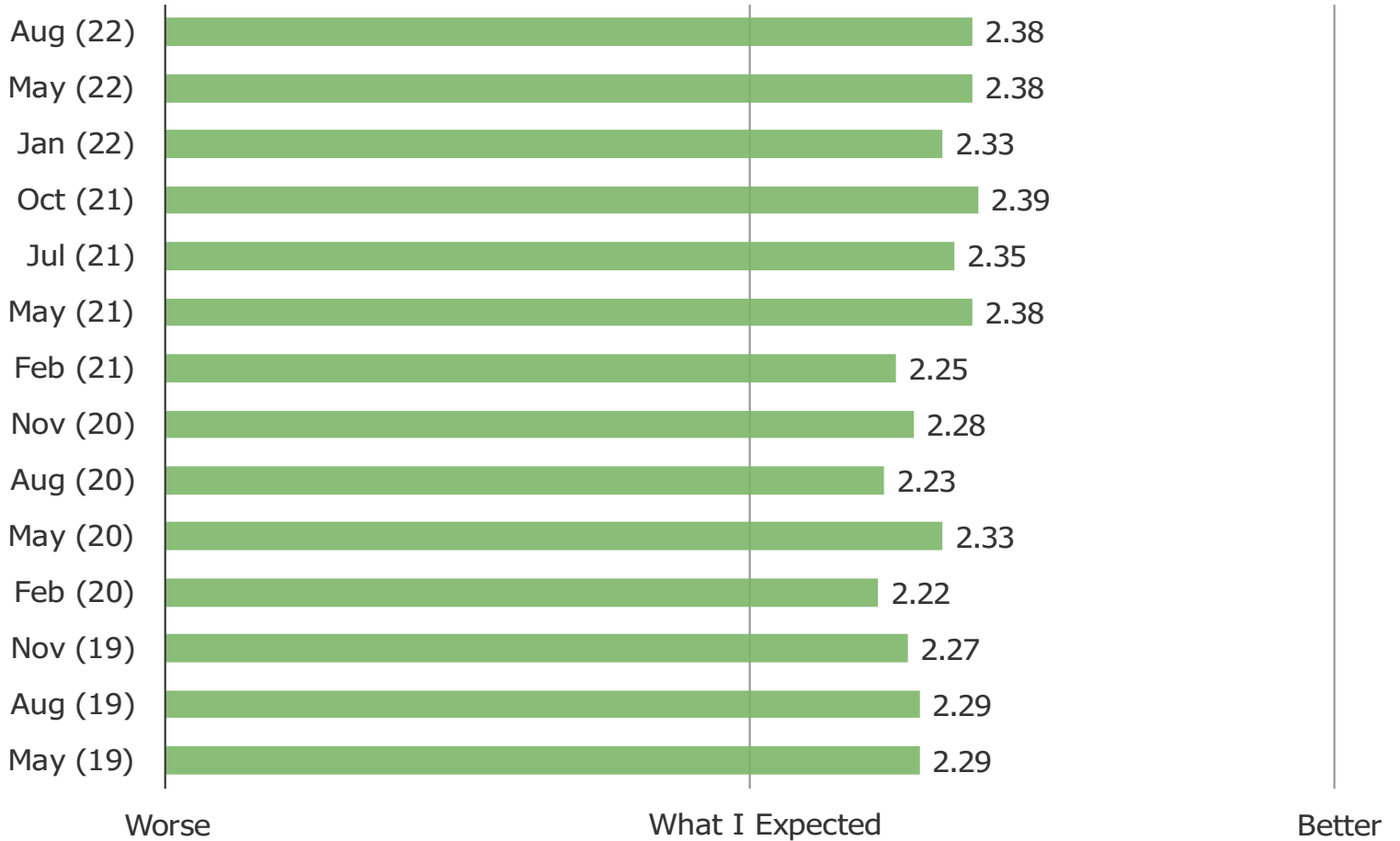
HOW SATISFIED ARE YOU WITH YOUR BED-IN-A-BOX MATTRESS?

Posed to respondents who have ordered a mattress online



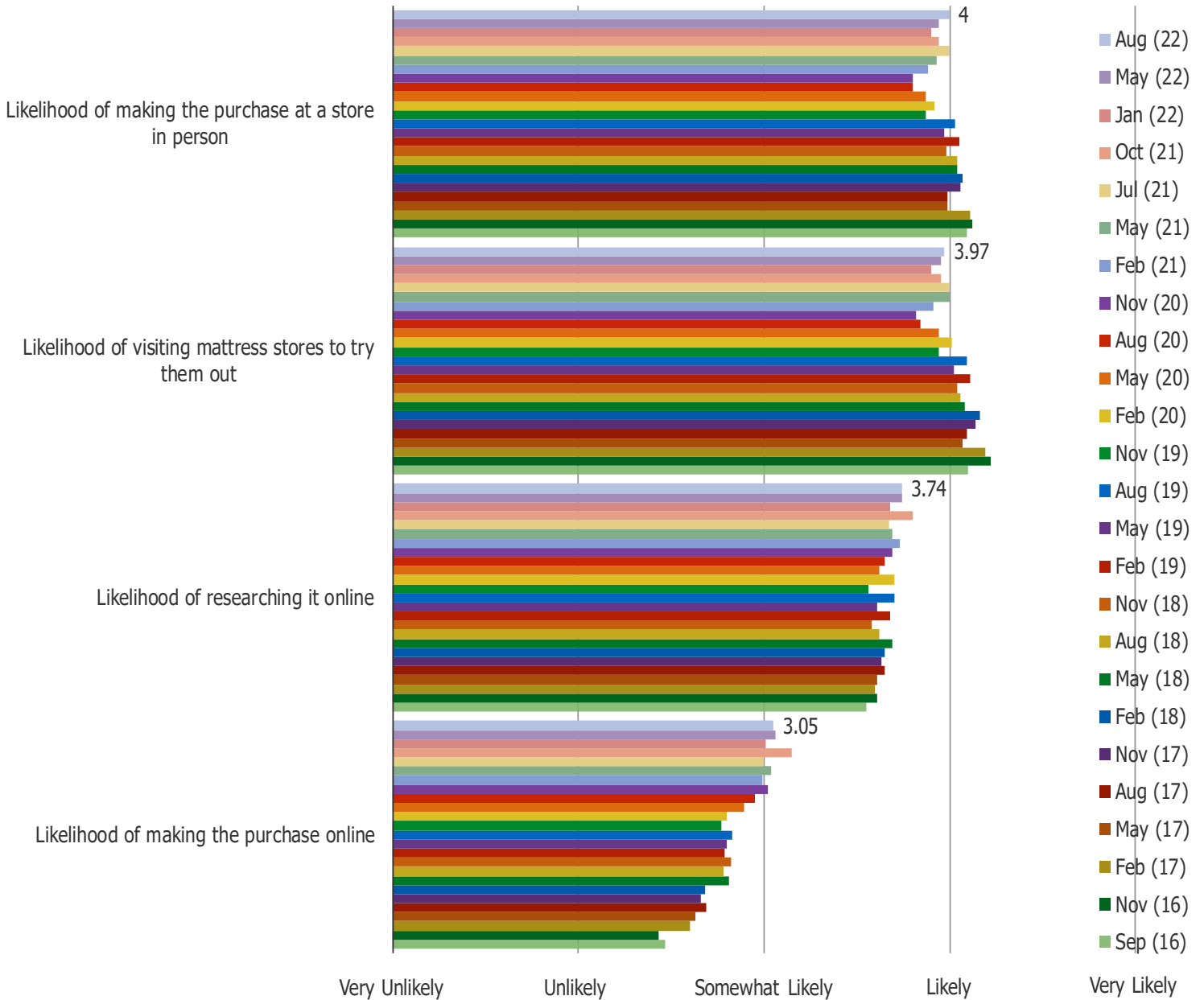
HOW IS THE MATTRESS HOLDING UP OVER TIME COMPARED TO YOUR EXPECTATIONS?

Posed to respondents who have ordered a mattress online



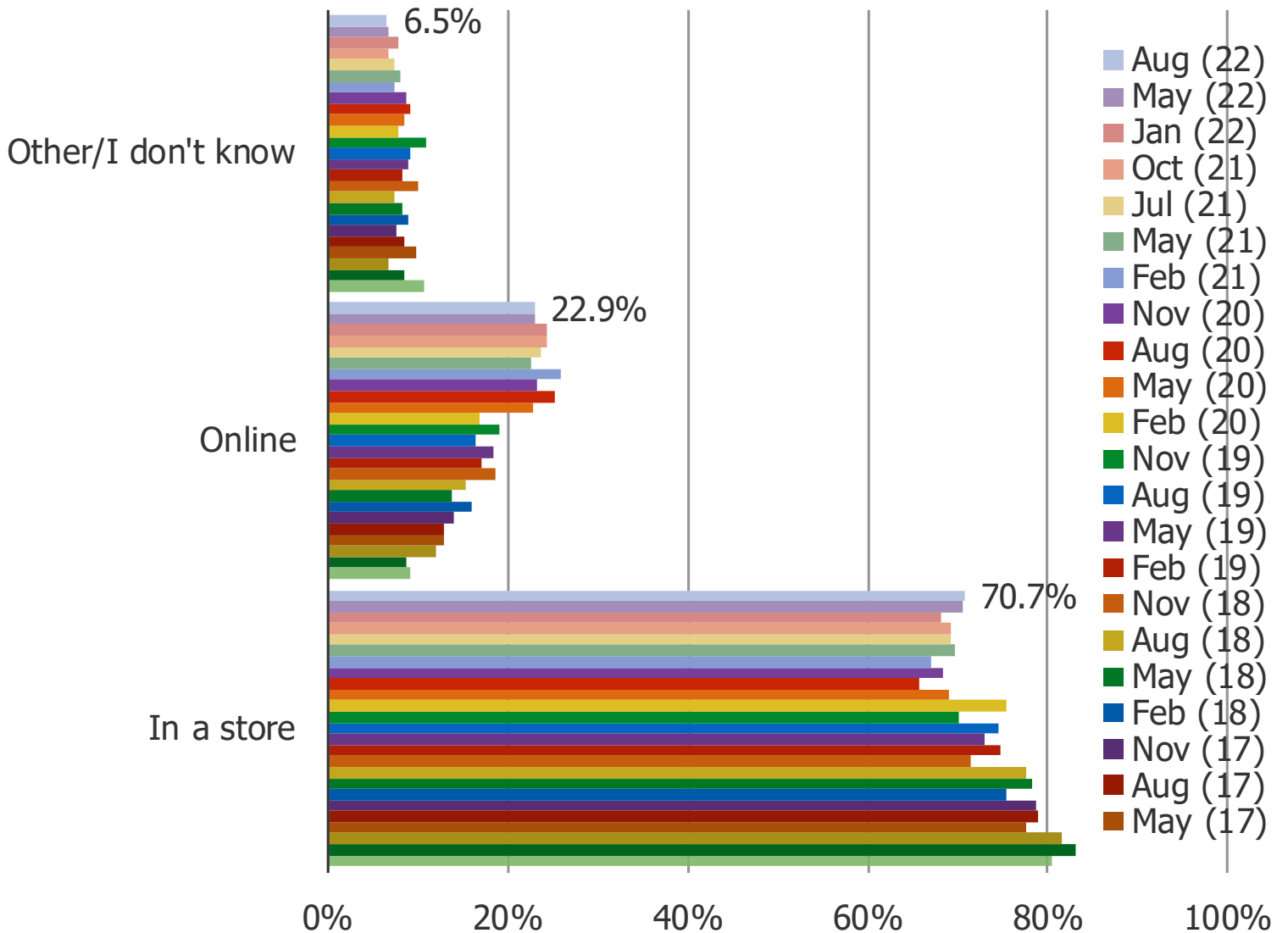
IF YOU NEEDED TO BUY A MATTRESS, HOW LIKELY WOULD YOU BE TO...

Posed to all respondents



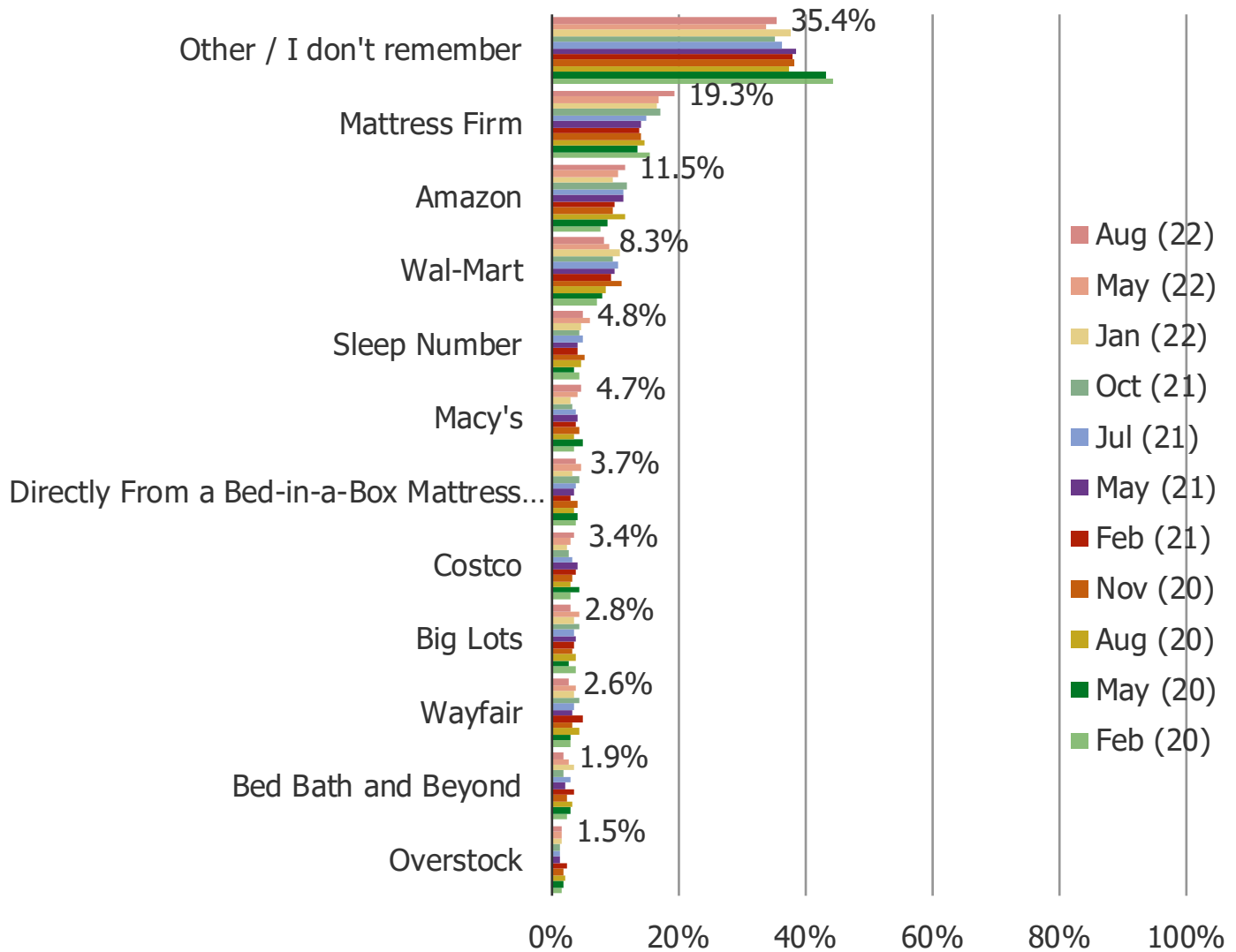
HOW DID YOU PURCHASE THE MOST RECENT MATTRESS THAT YOU BOUGHT?

Posed to all respondents



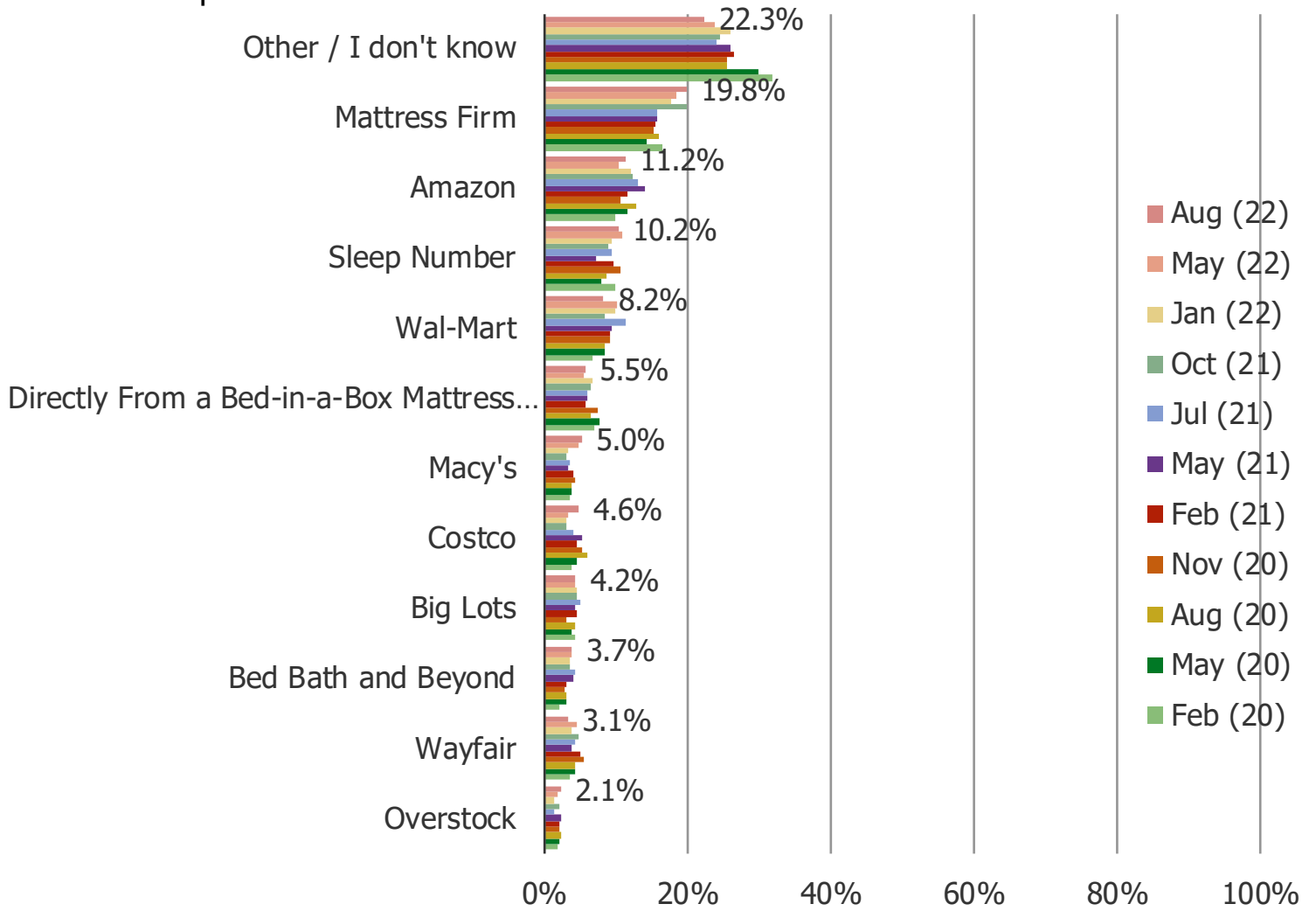
FROM WHICH STORE/WEBSITE DID YOU MAKE YOUR MOST RECENT MATTRESS PURCHASE?

Posed to all respondents



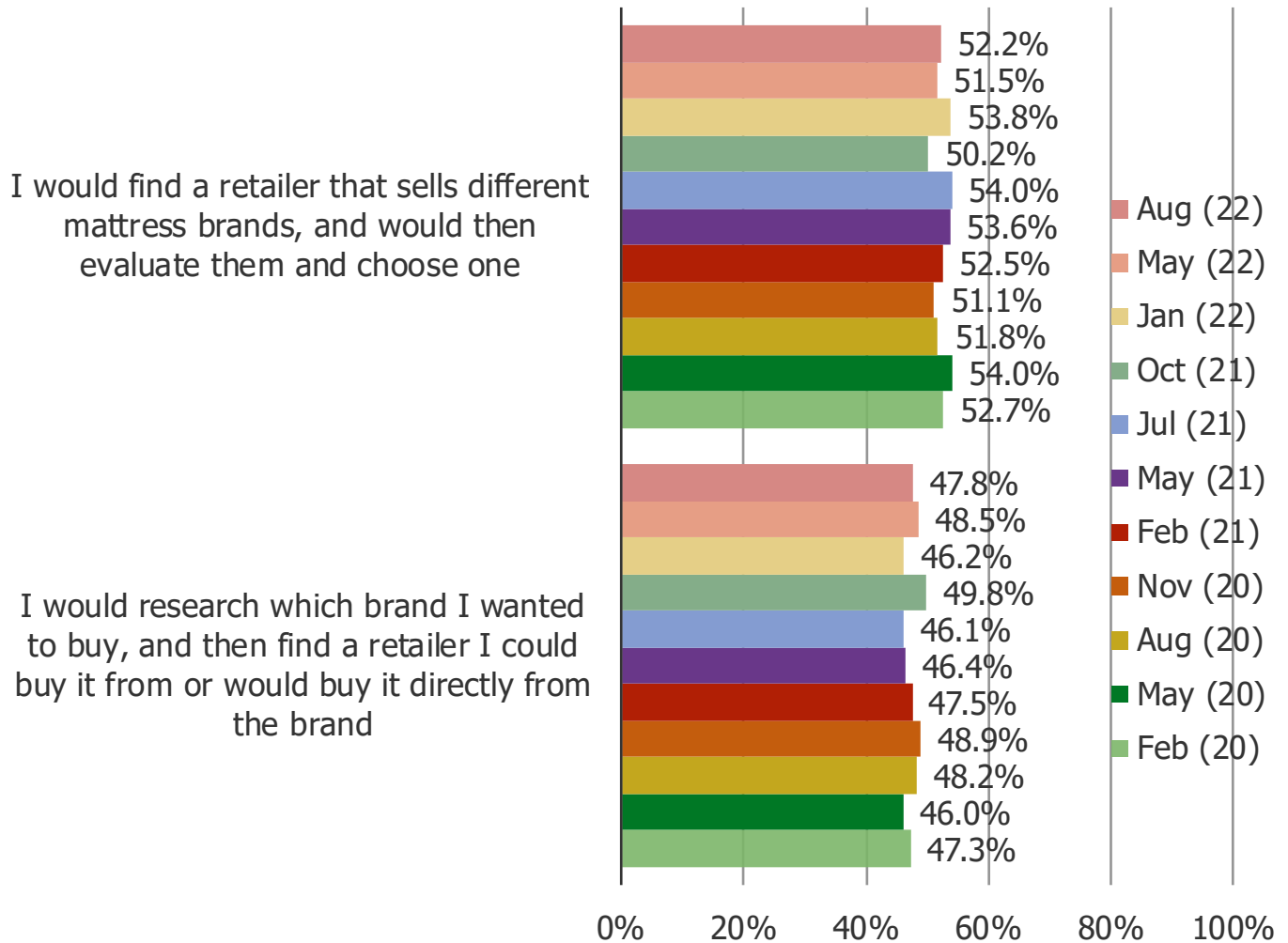
IF YOU HAD TO BUY A MATTRESS TODAY, WHERE WOULD YOU BE MOST LIKELY TO BUY THEM FROM?

Posed to all respondents



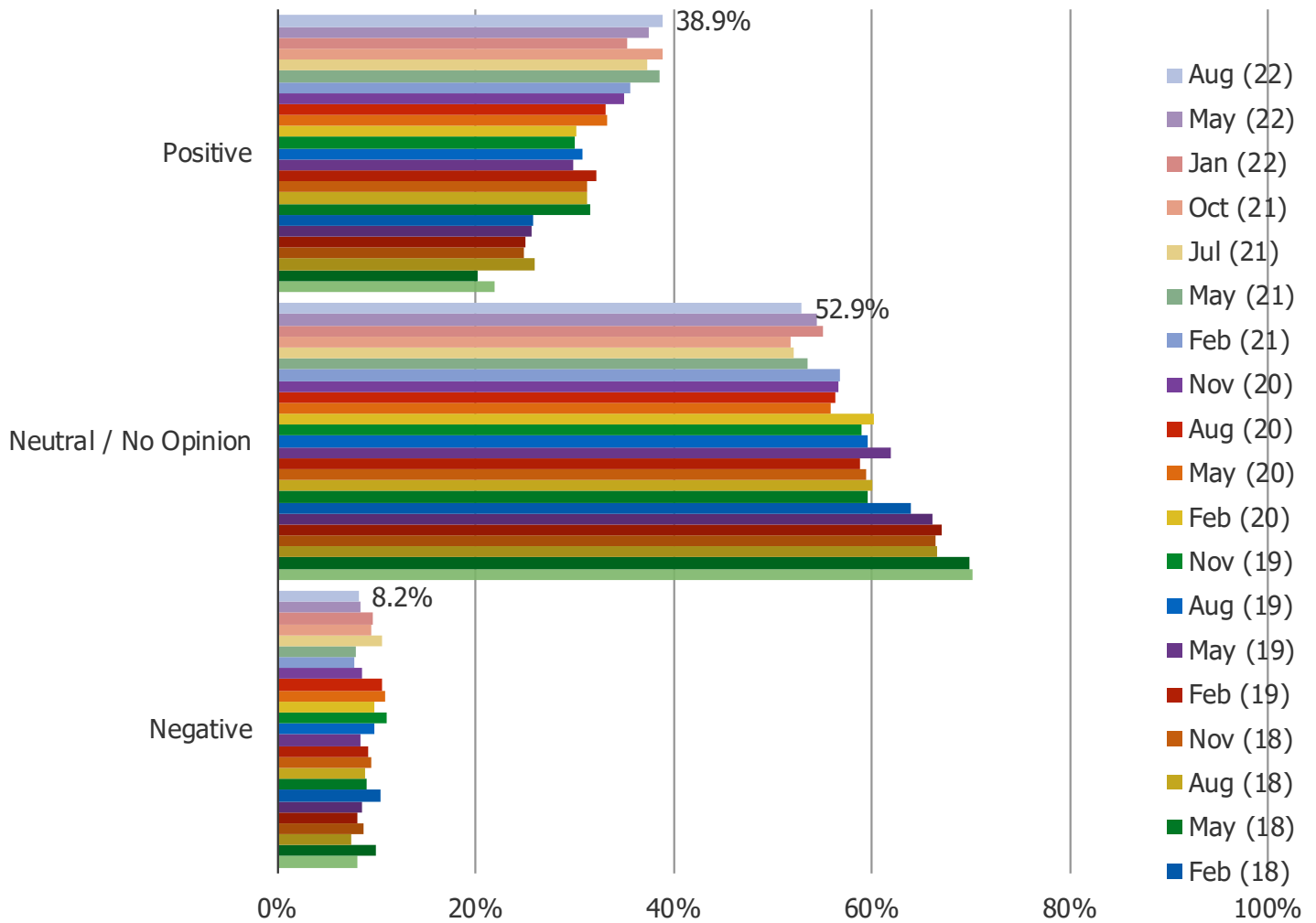
IF YOU NEEDED TO BUY A MATTRESS TODAY, HOW WOULD YOU BEGIN YOUR SEARCH?

Posed to all respondents



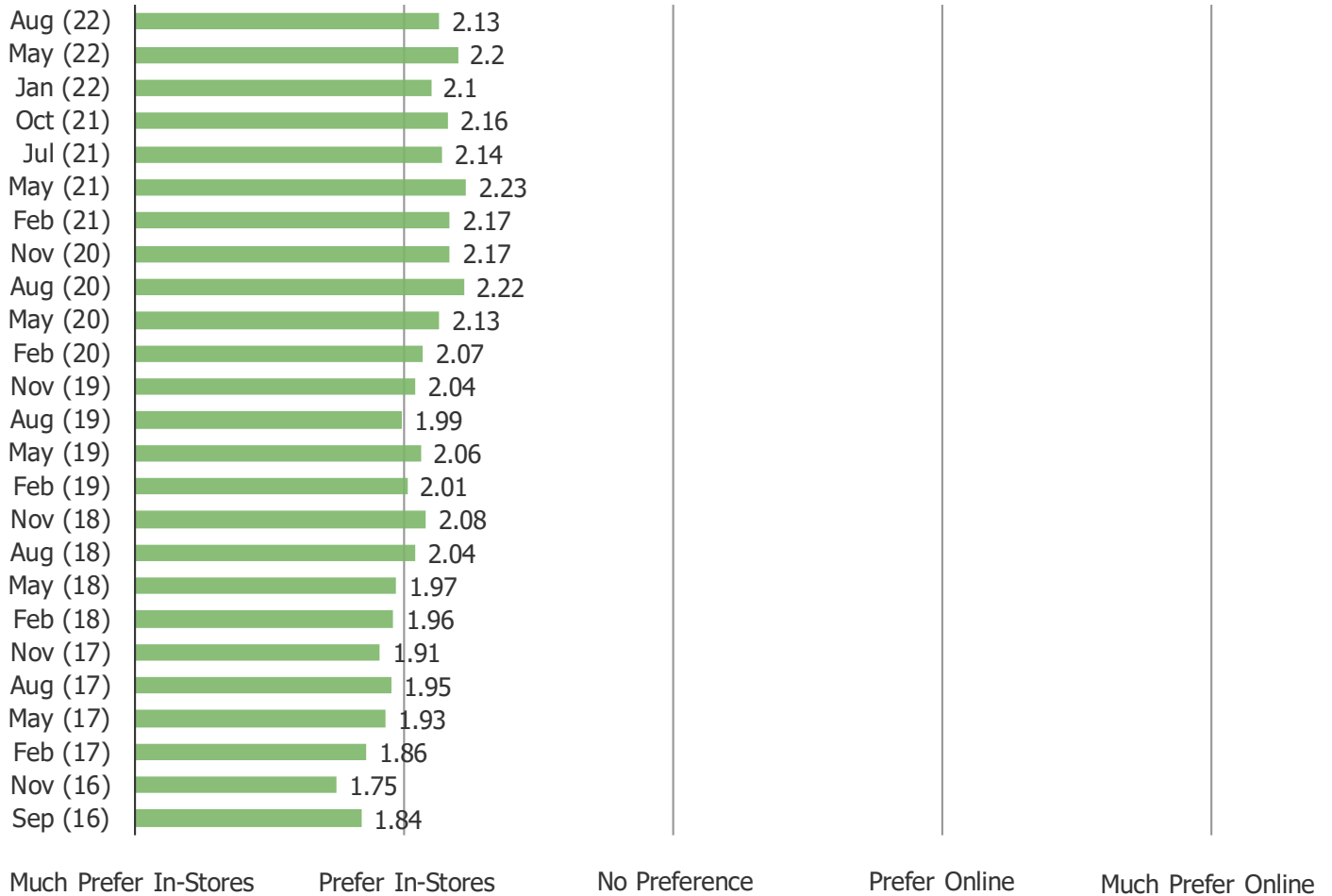
OPINION OF BED IN A BOX MATTRESS PROVIDERS WHO SHIP MATTRESSES TO CUSTOMERS IN A VACUUM SEALED BOX

Posed to all respondents



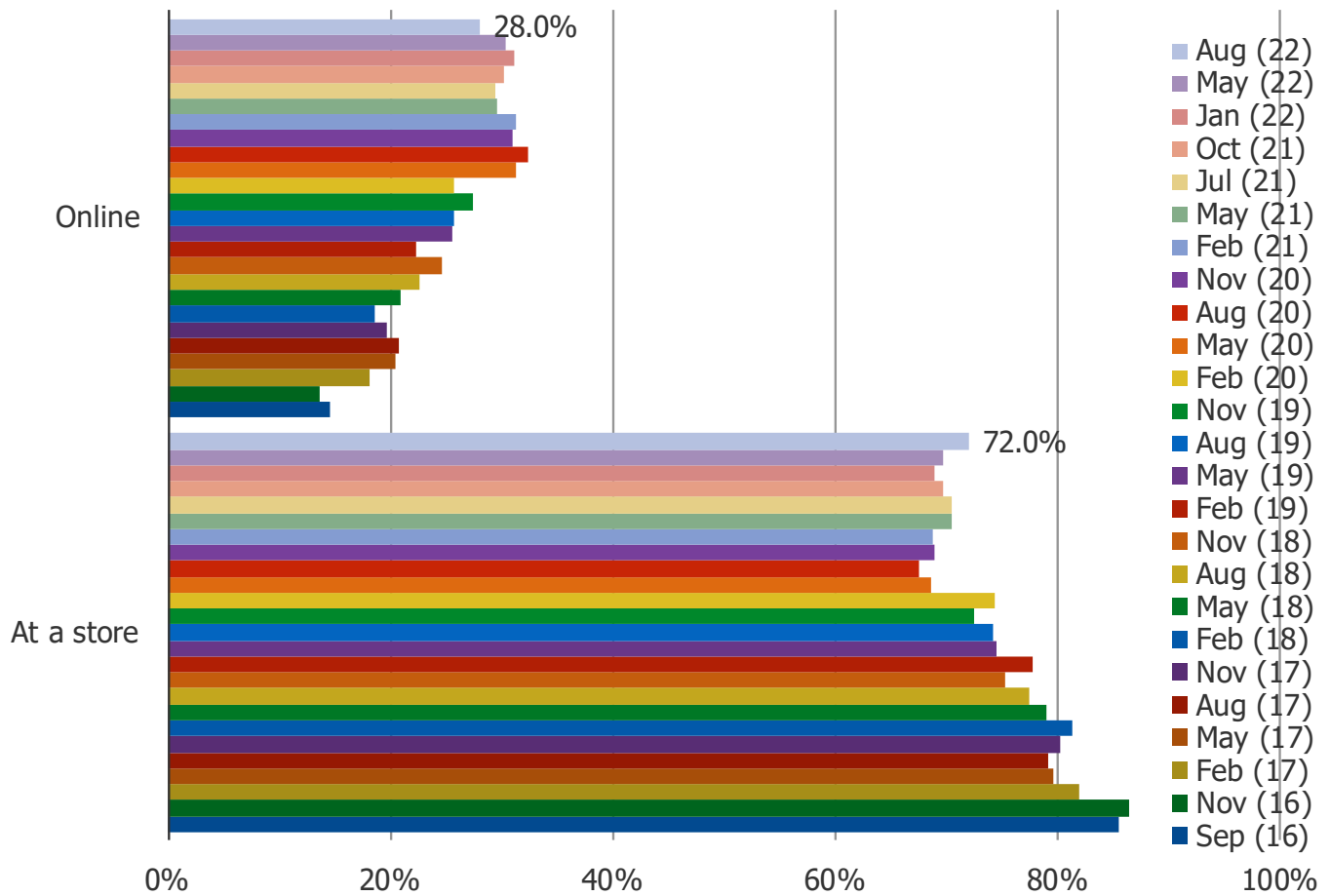
PREFERRED METHOD FOR MATTRESS SHOPPING

Posed to all respondents



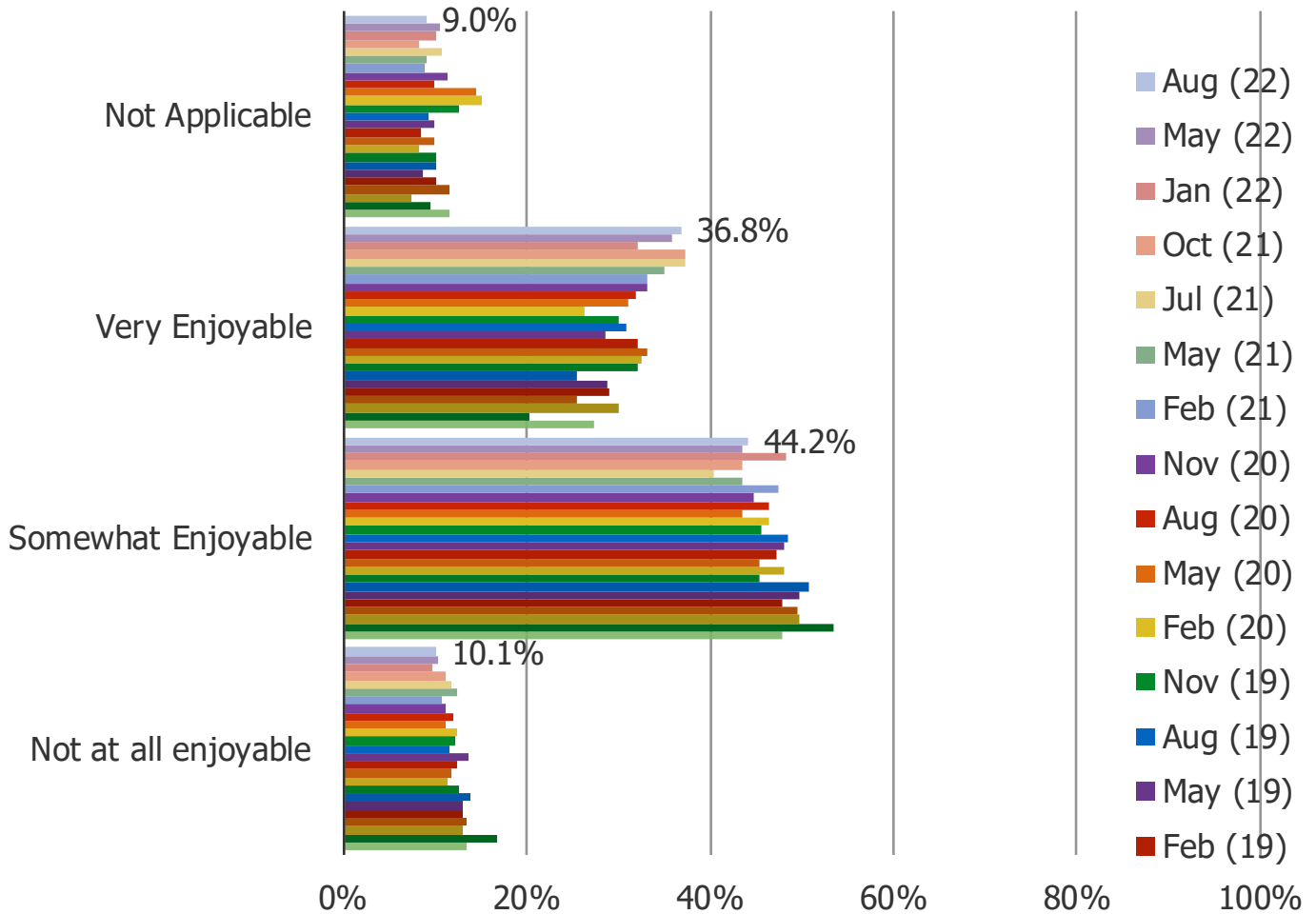
WHEN IT IS TIME TO GET A NEW MATTRESS, DO YOU THINK YOU WILL BUY IT AT A STORE OR ONLINE?

Posed to all respondents



HOW ENJOYABLE DID YOU FIND THE MATTRESS BUYING PROCESS?

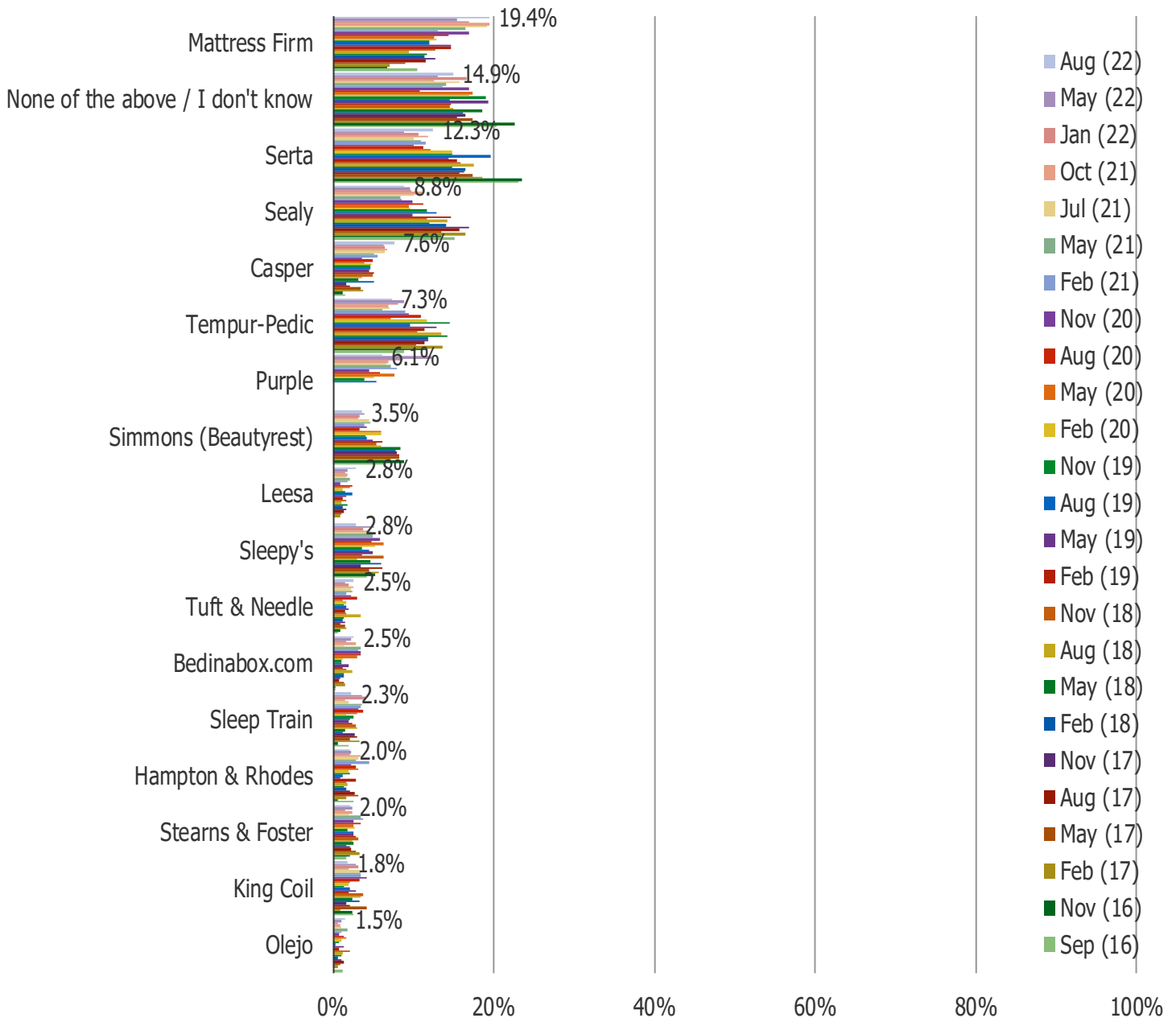
Posed to all respondents



COMPETITIVE DYNAMICS

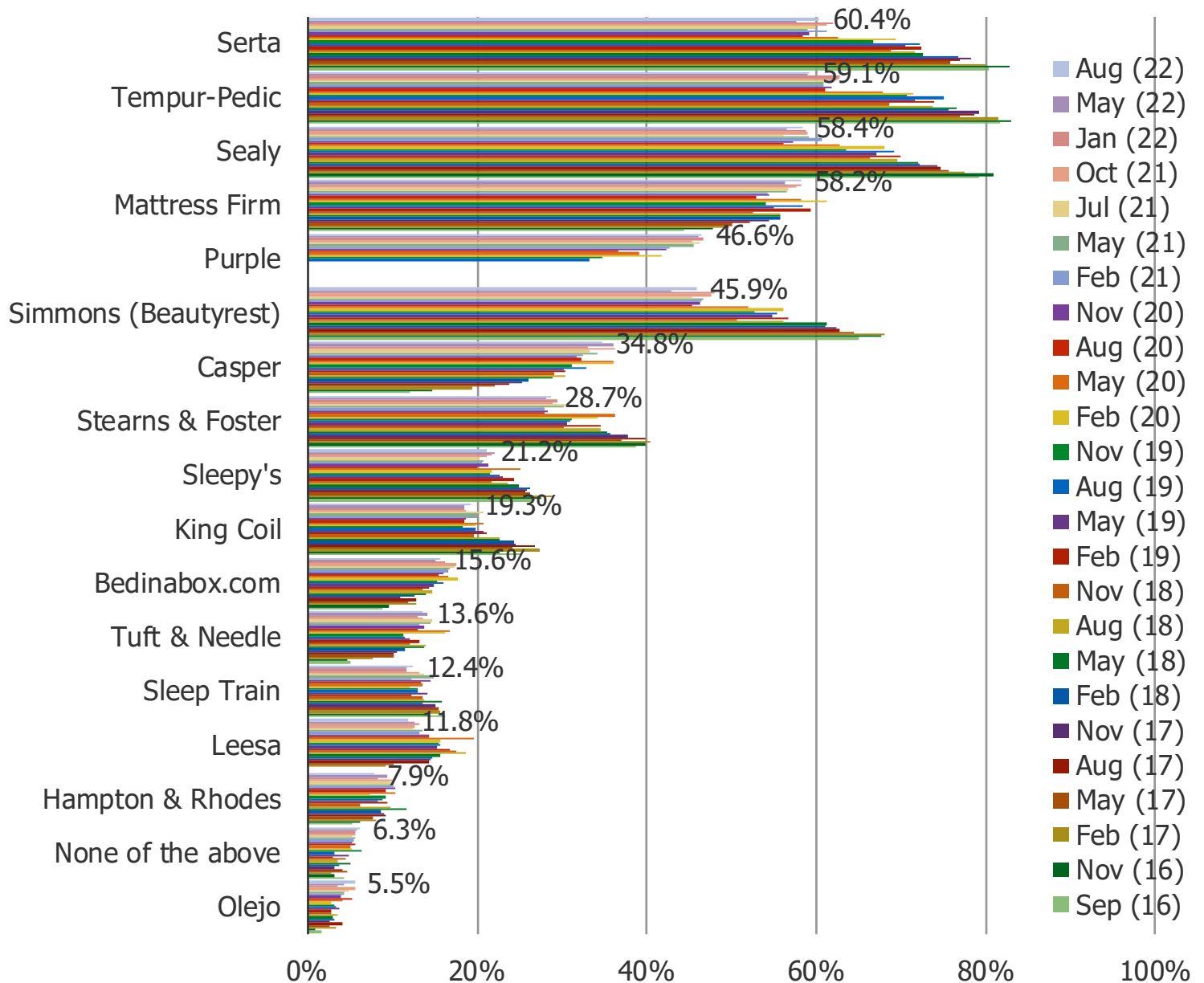
WHICH BRAND DID YOU PURCHASE?

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



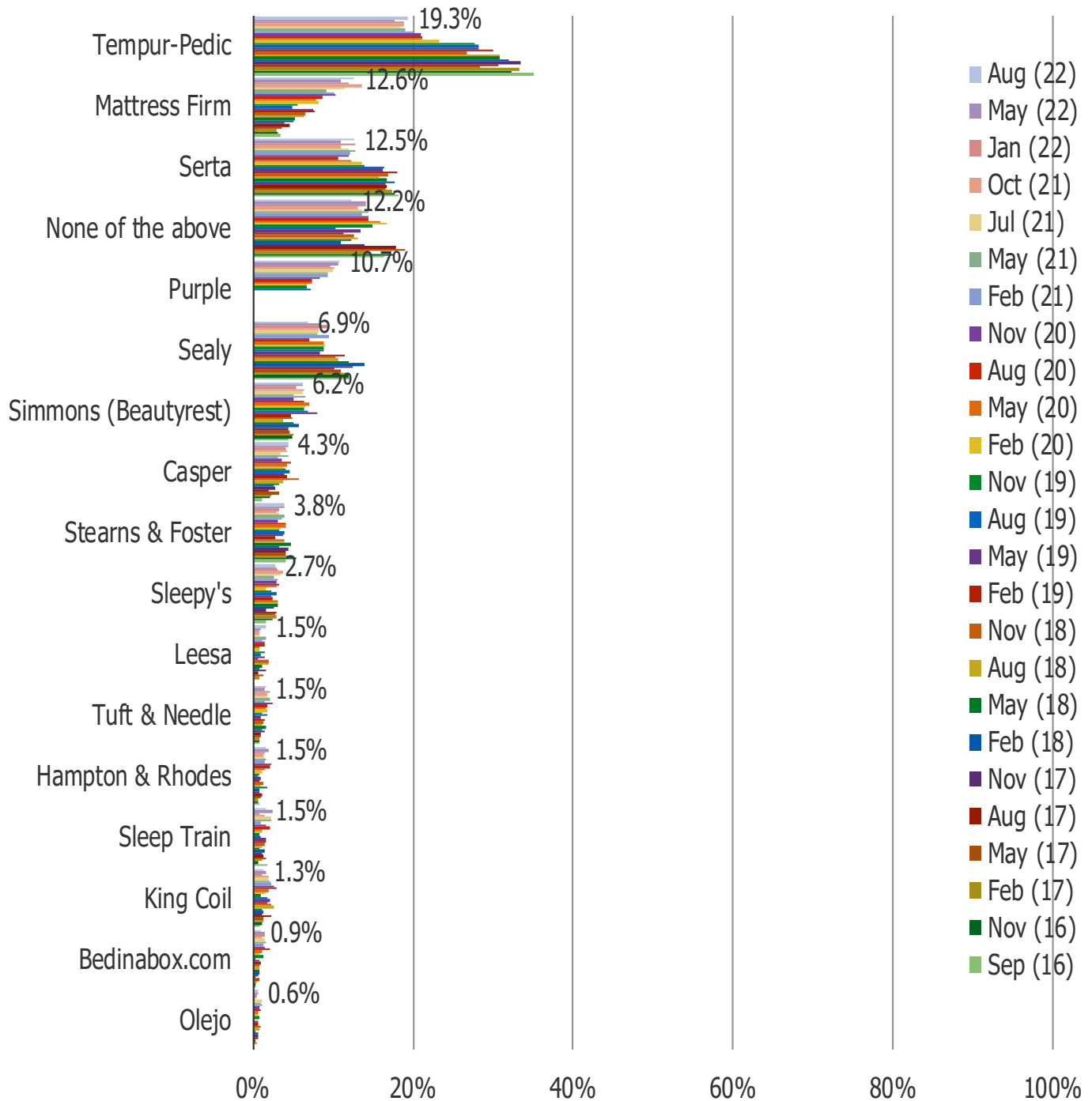
AWARENESS

Posed to all respondents



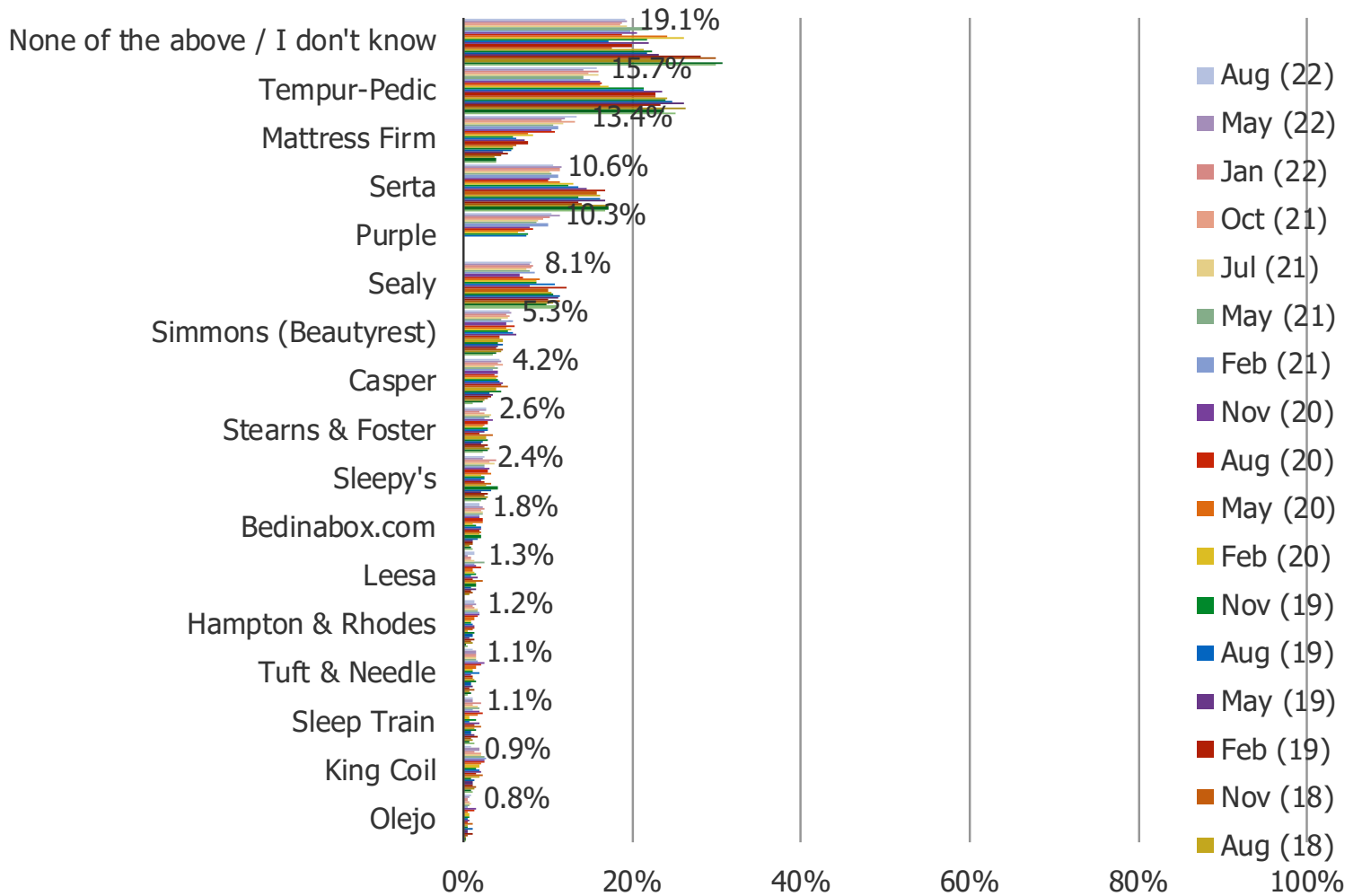
WHICH OF THE FOLLOWING MATTRESSES DO YOU THINK IS BEST?

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

