

BESPOKE SURVEYS

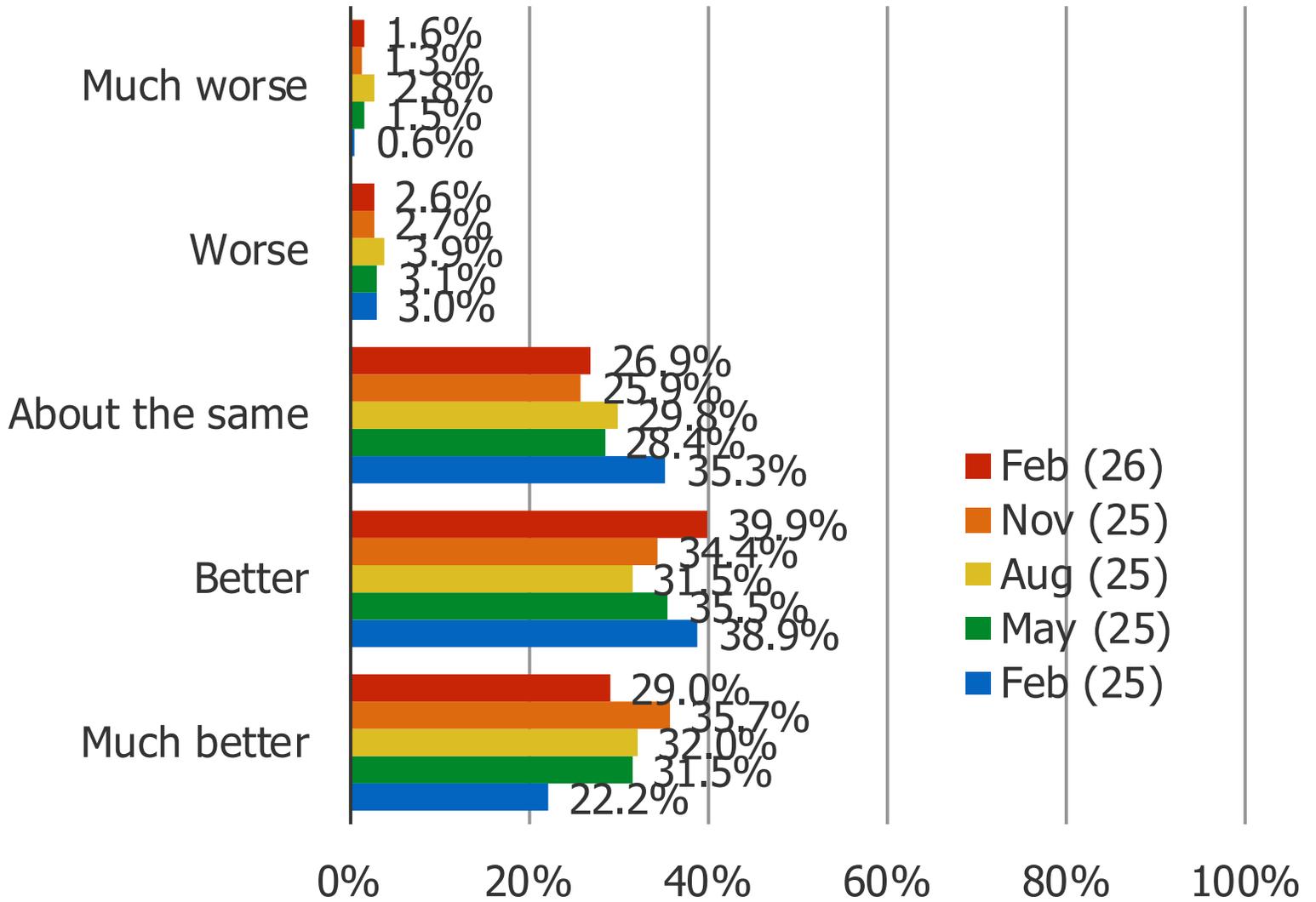
Furniture and Mattresses, Vol 39

1,000+ Respondents Per Quarter

RECENTLY ADDED QUESTIONS

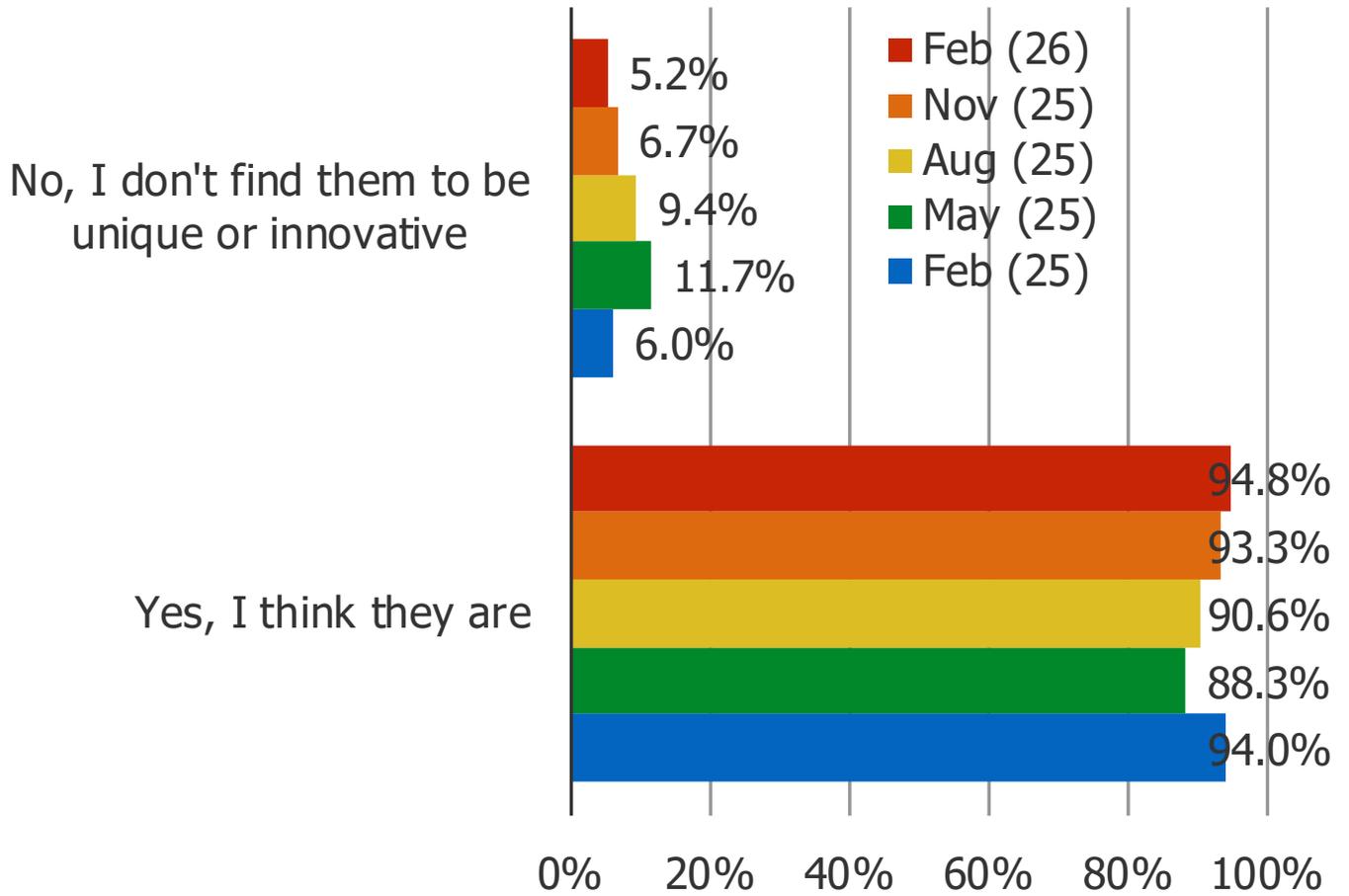
HOW DO YOU FIND RH'S NEWEST COLLECTIONS COMPARE TO THE PRIOR ONES?

Posed to all respondents who have browsed RH's furniture collections in the past 12 months (N = 193).



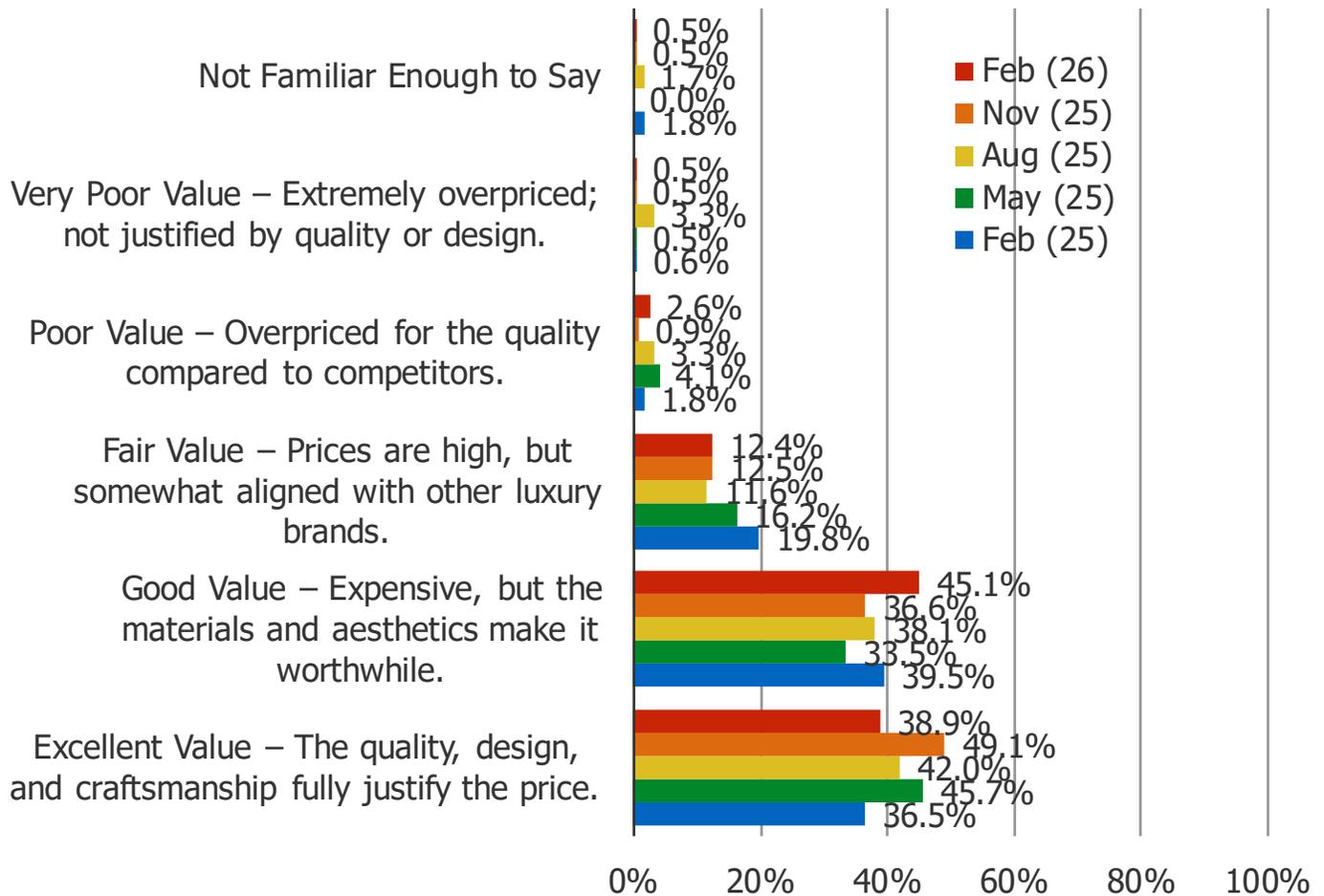
DO YOU FIND RH'S DESIGNS TO BE UNIQUE AND INNOVATIVE IN THE LUXURY FURNITURE MARKET?

Posed to all respondents who have browsed RH's furniture collections in the past 12 months (N = 193).



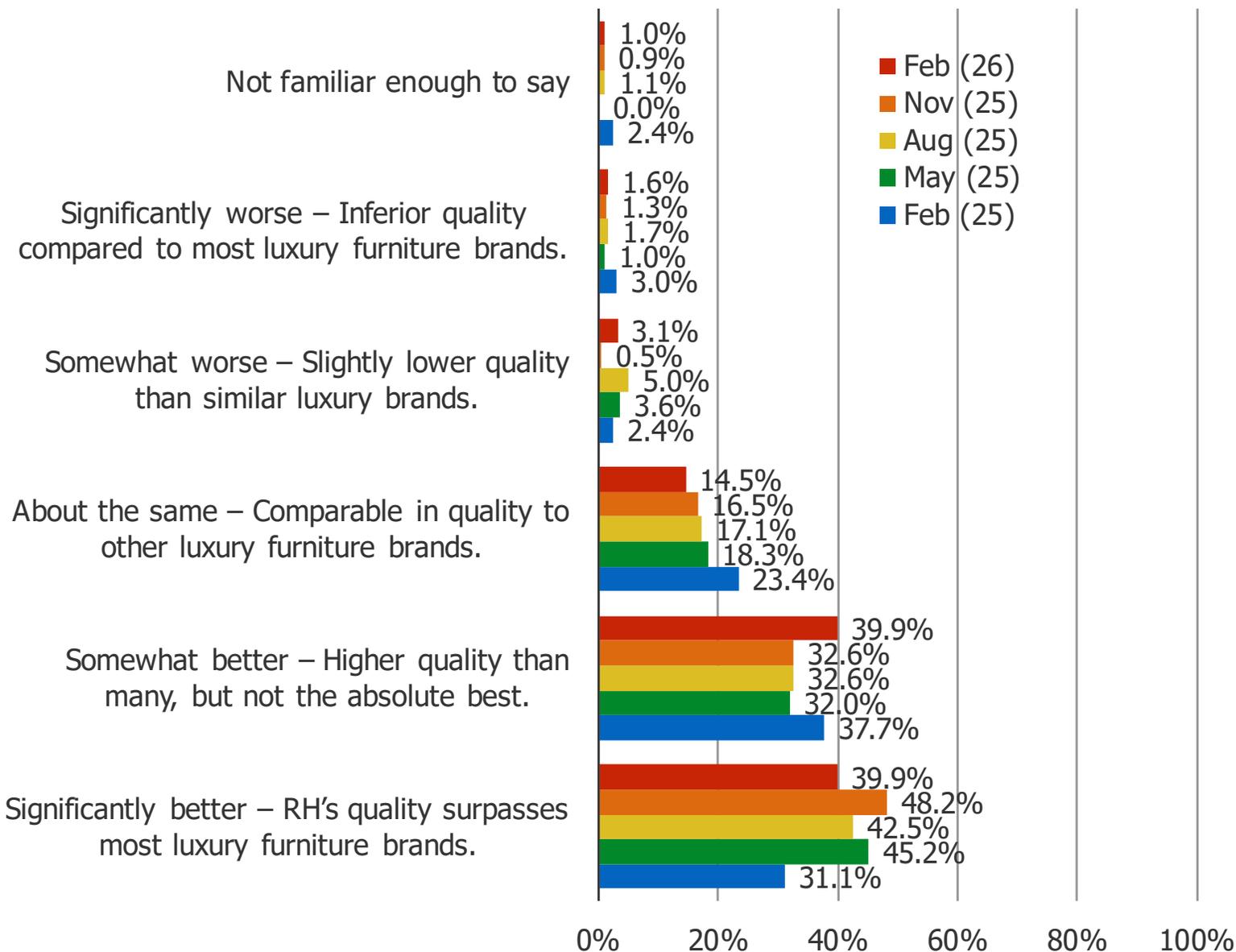
DO YOU FEEL RH'S PRODUCTS OFFER GOOD VALUE FOR THEIR PRICE POINT IN THE LUXURY MARKET?

Posed to all respondents who have browsed RH's furniture collections in the past 12 months (N = 193).



HOW WOULD YOU RATE THE QUALITY OF RH'S FURNITURE COMPARED TO OTHER LUXURY BRANDS?

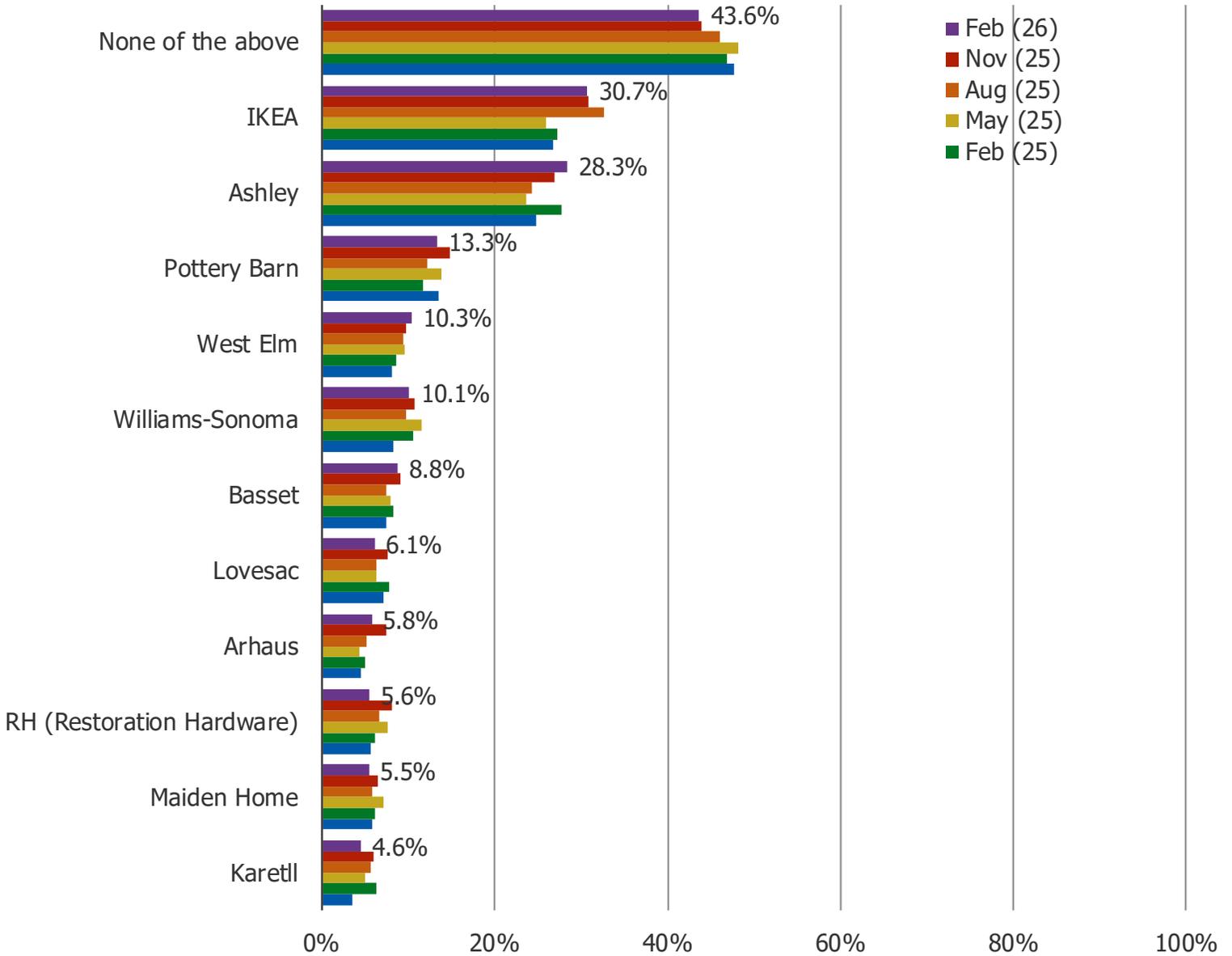
Posed to all respondents who have browsed RH's furniture collections in the past 12 months (N = 193).



Mattresses and Furniture

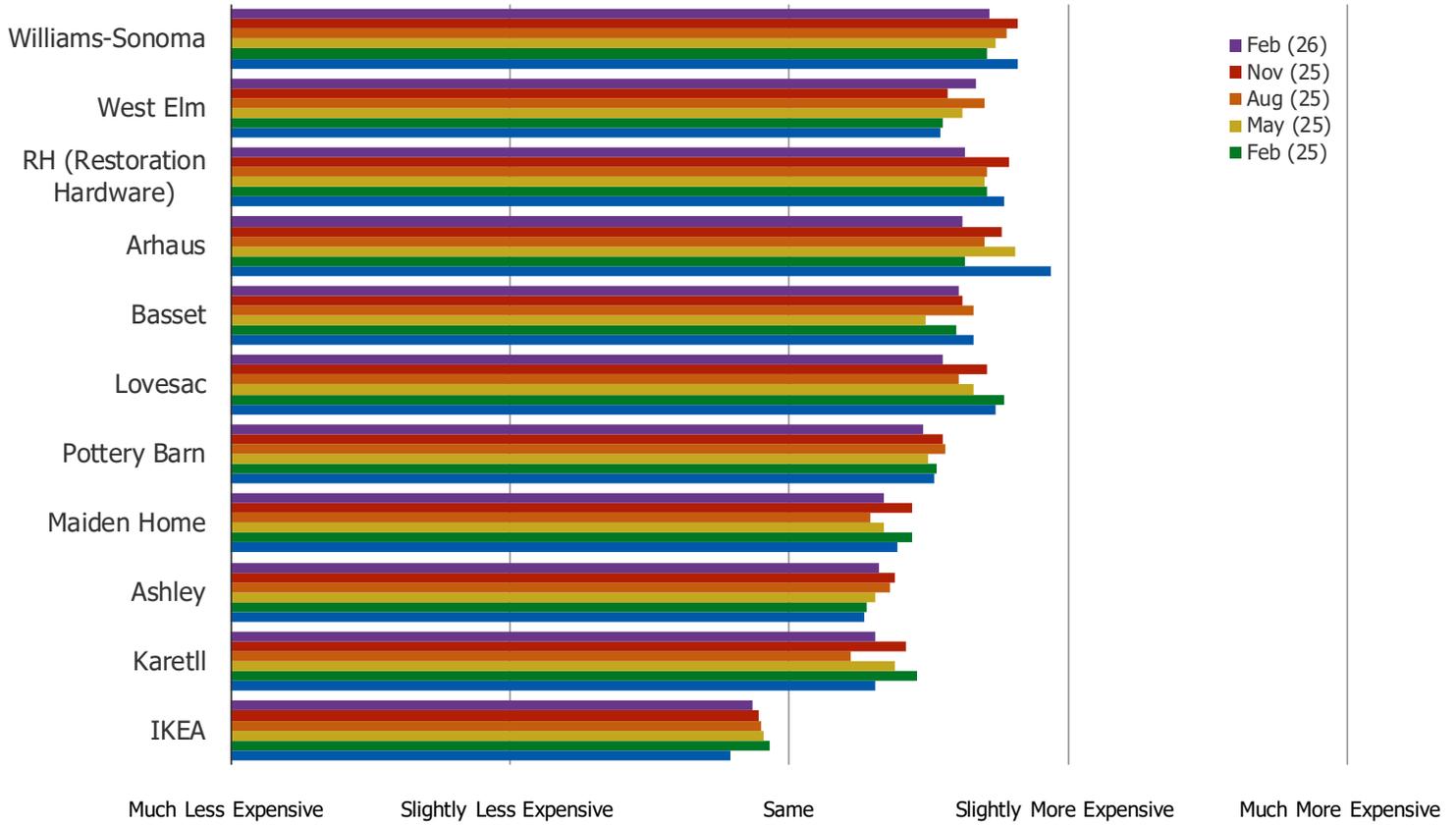
HAVE YOU BROWSED FURNITURE FROM ANY OF THE FOLLOWING IN THE PAST YEAR? SELECT ALL THAT APPLY

Posed to all respondents.



HOW DO YOU VIEW FURNITURE PRICING FROM THE FOLLOWING RELATIVE TO THEIR COMPETITORS?

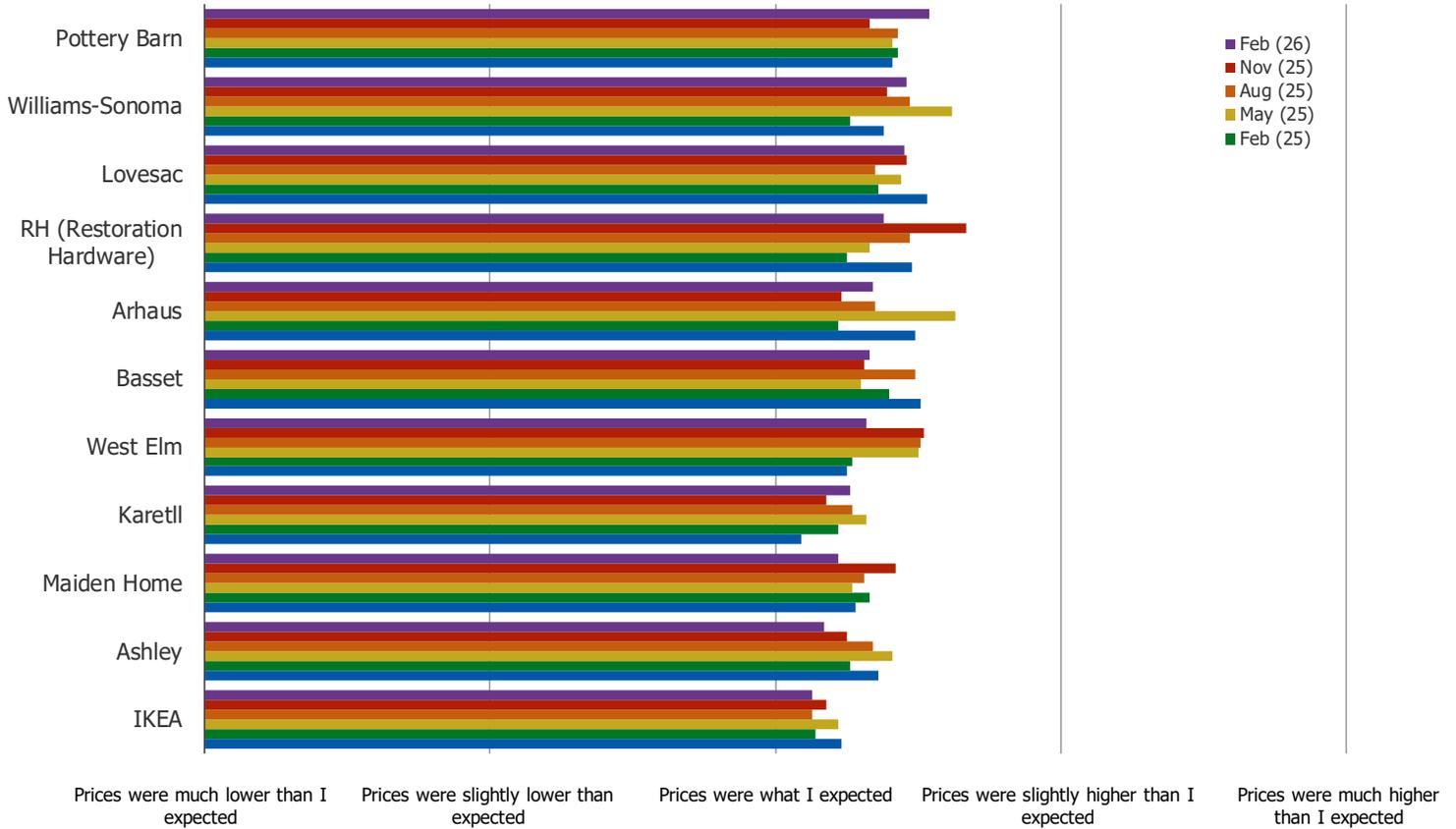
Posed to respondents who are familiar with each of the following.



	N=
RH (Restoration Hardware)	131
Arhaus	87
Maiden Home	93
Pottery Barn	410
Basset	289
IKEA	644
Ashley	620
Karettl	55
Williams-Sonoma	340
West Elm	211
Lovesac	183

HAVE YOU NOTICED CHANGES IN PRICING WHEN YOU LAST VISITED THE FOLLOWING?

Posed to respondents who have browsed furniture from the below in the past year.

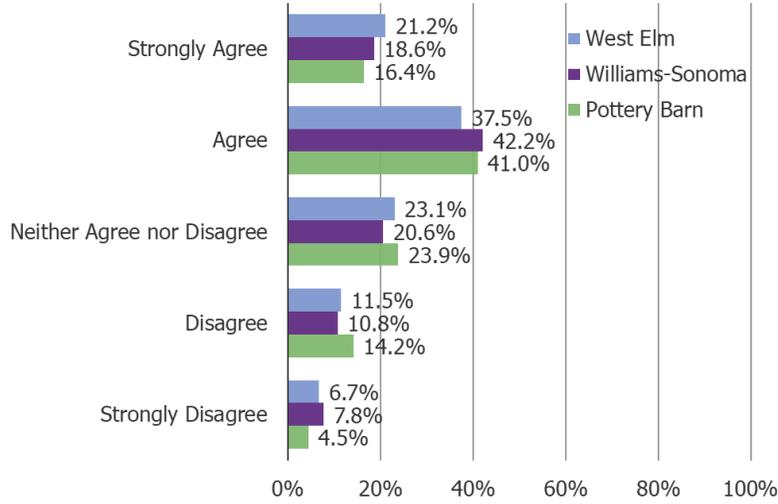


	N=
RH (Restoration Hardware)	56
Arhaus	58
Maiden Home	55
Pottery Barn	134
Basset	89
IKEA	310
Ashley	286
Karettl	46
Williams-Sonoma	102
West Elm	104
Lovesac	62

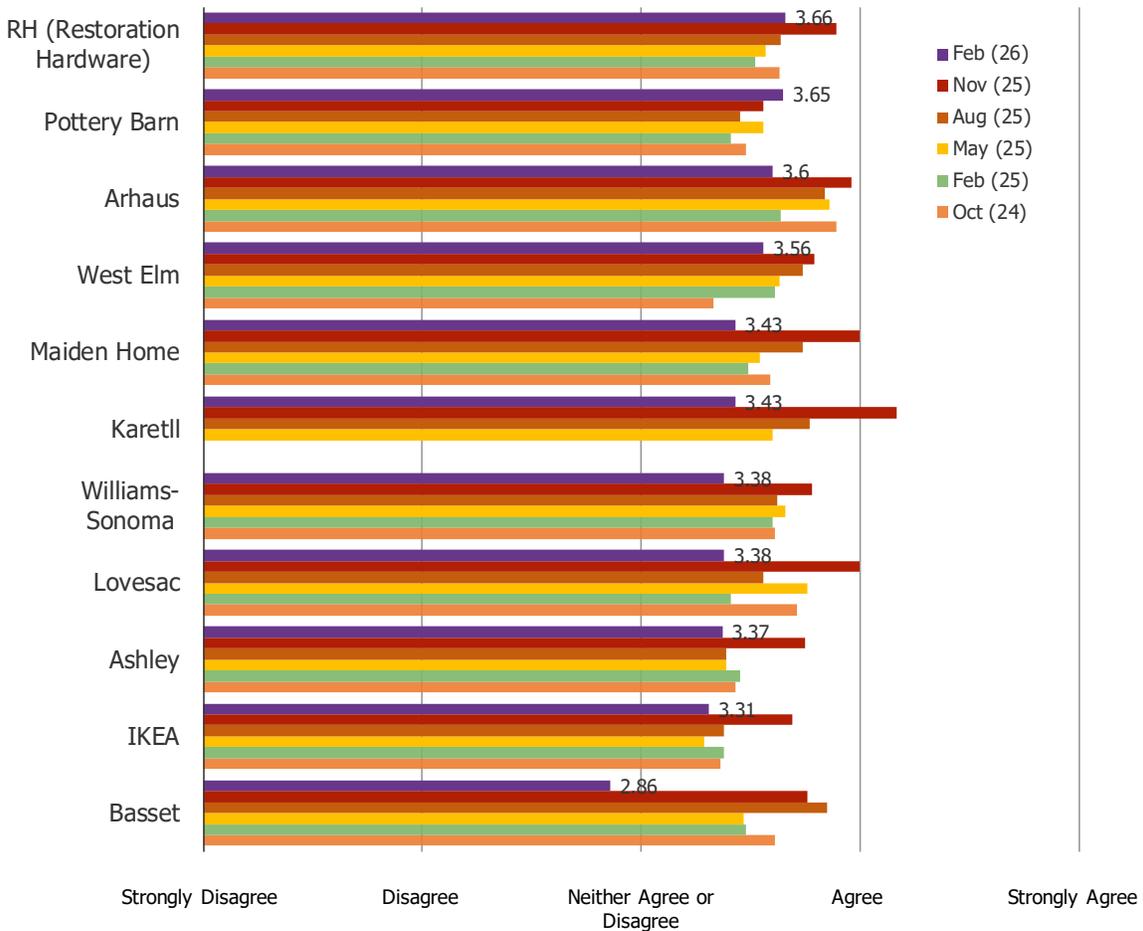
Mattresses and Furniture

PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING FOR EACH BRAND YOU HAVE BROWSED IN THE PAST YEAR..."THE PRICING GAPS BETWEEN THIS BRAND AND COMPETITORS HAVE GOTTEN TOO HIGH"

Posed to respondents who have browsed furniture from the below in the past year.



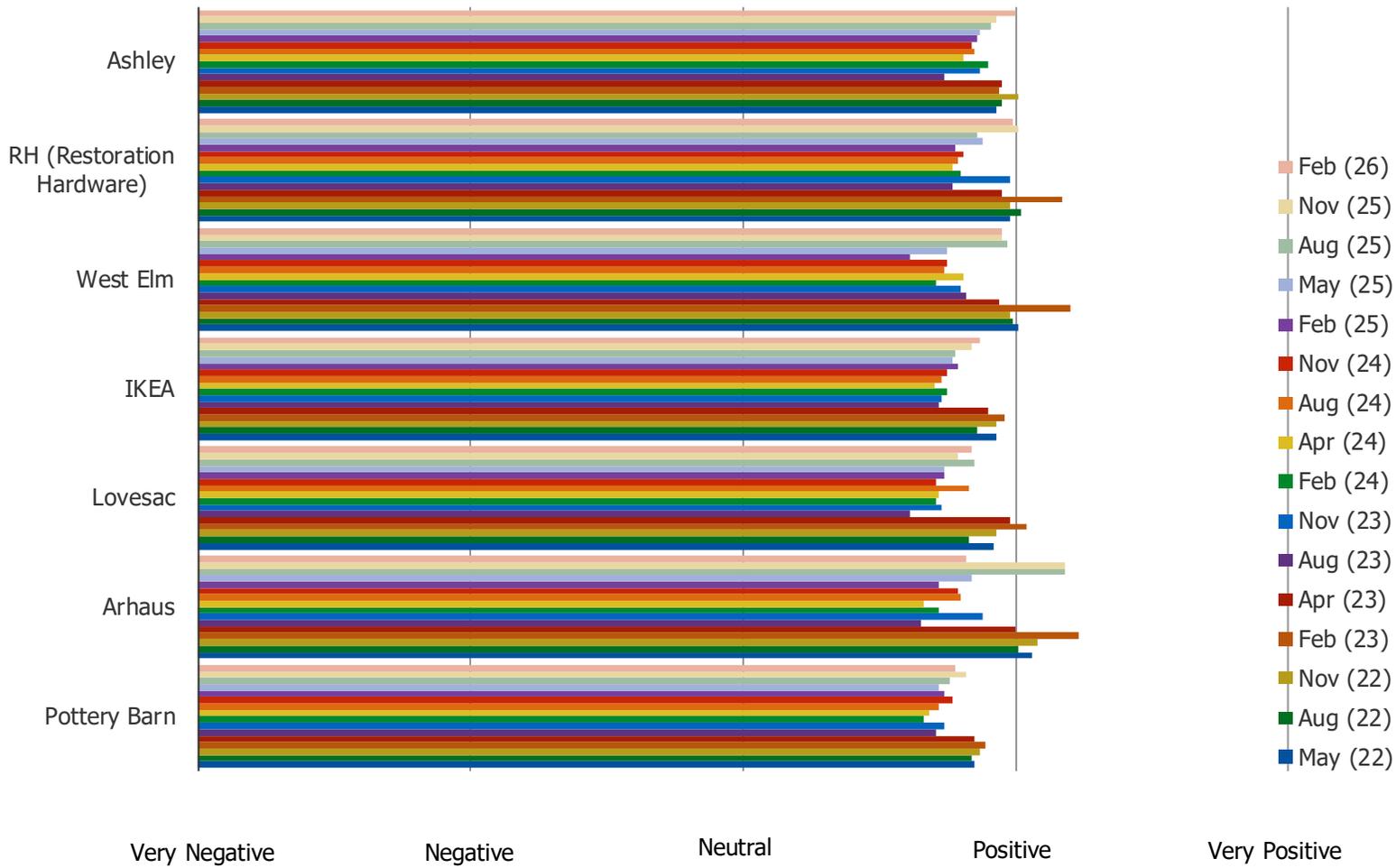
Weighted Average (With History)



LUXURY FURNITURE DEMAND AND FURNITURE BRANDS

WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

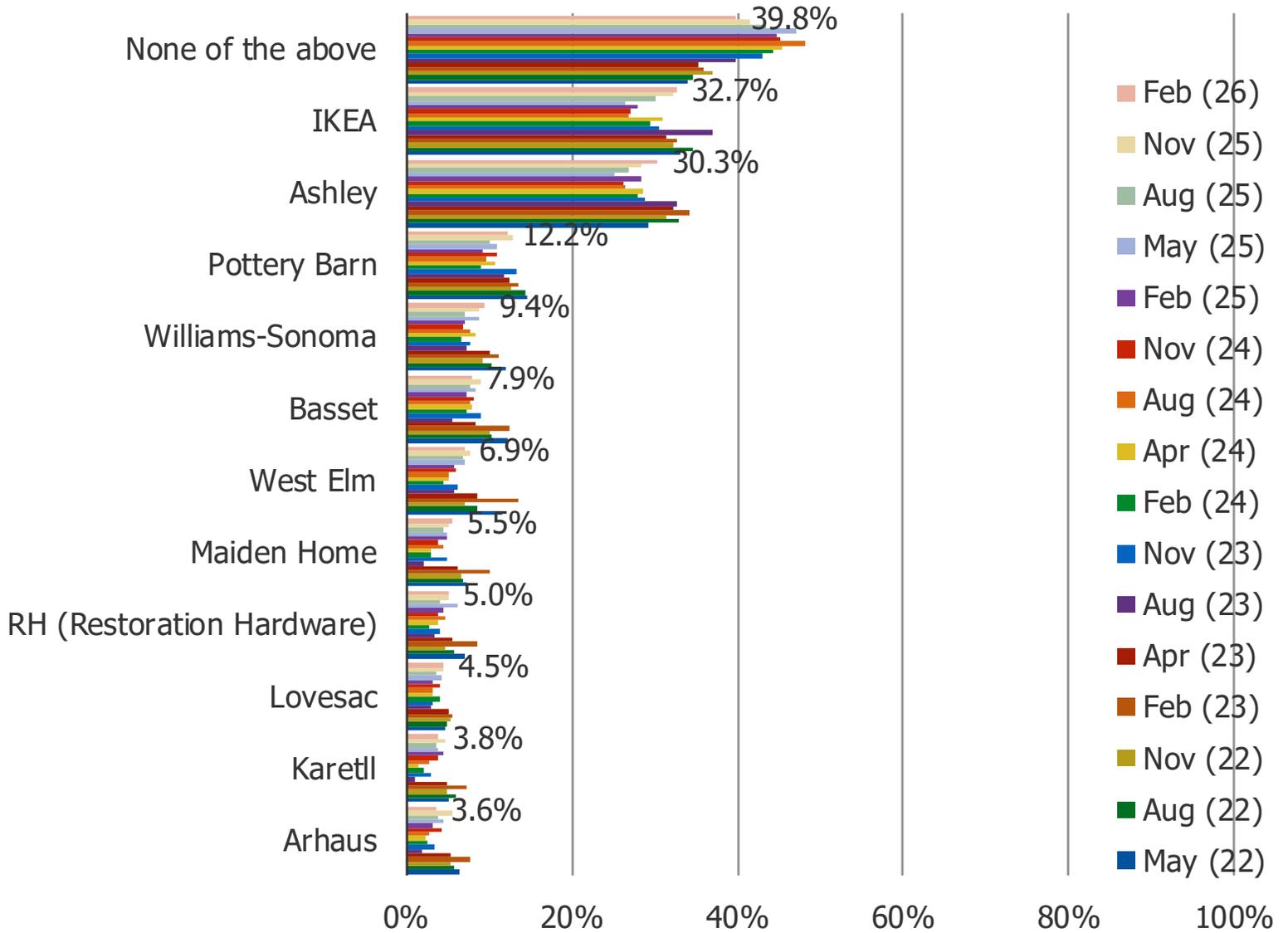
Posed to respondents who are familiar with each of the following.



Mattresses and Furniture

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

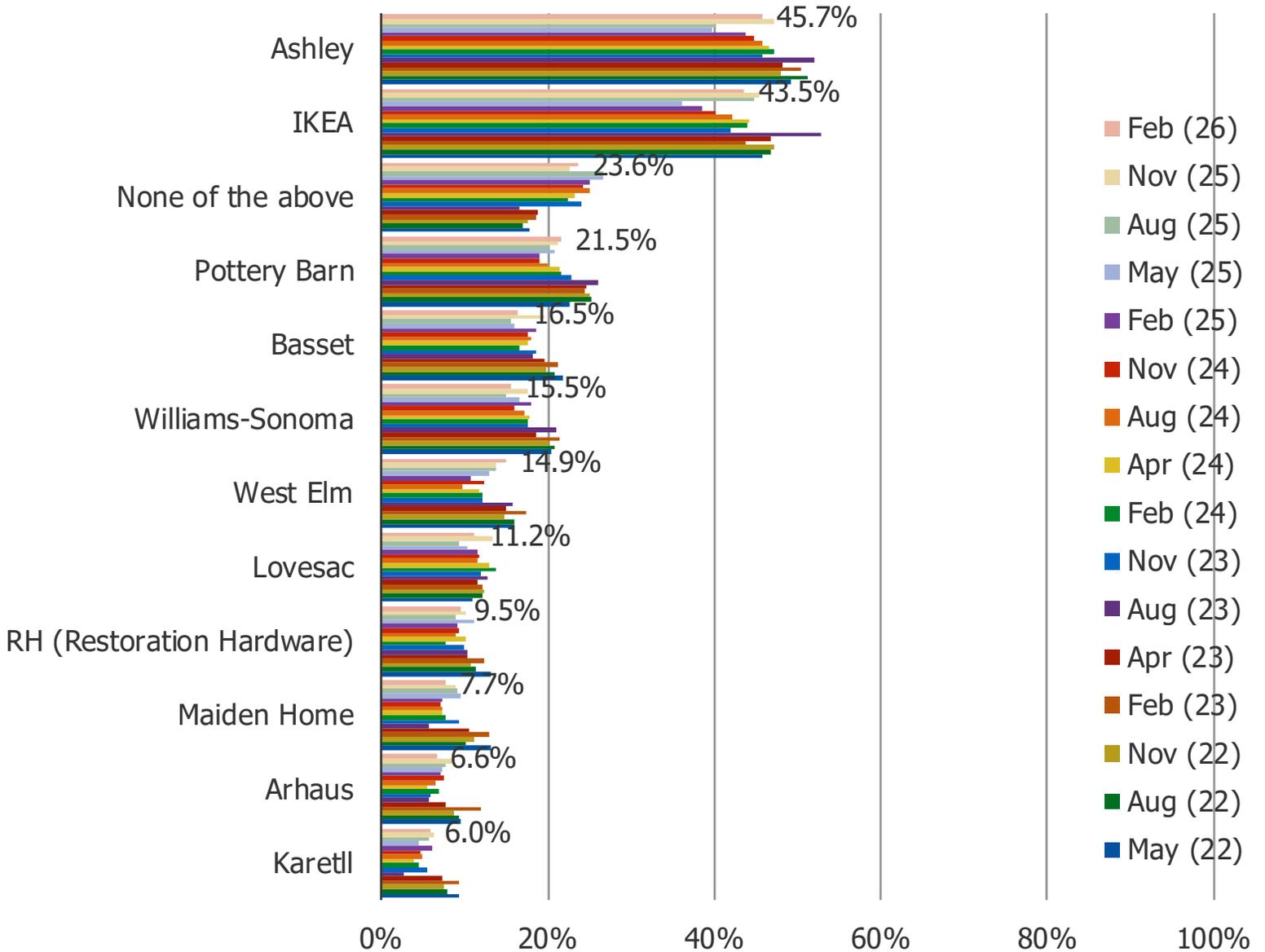
Posed to all respondents.



Mattresses and Furniture

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

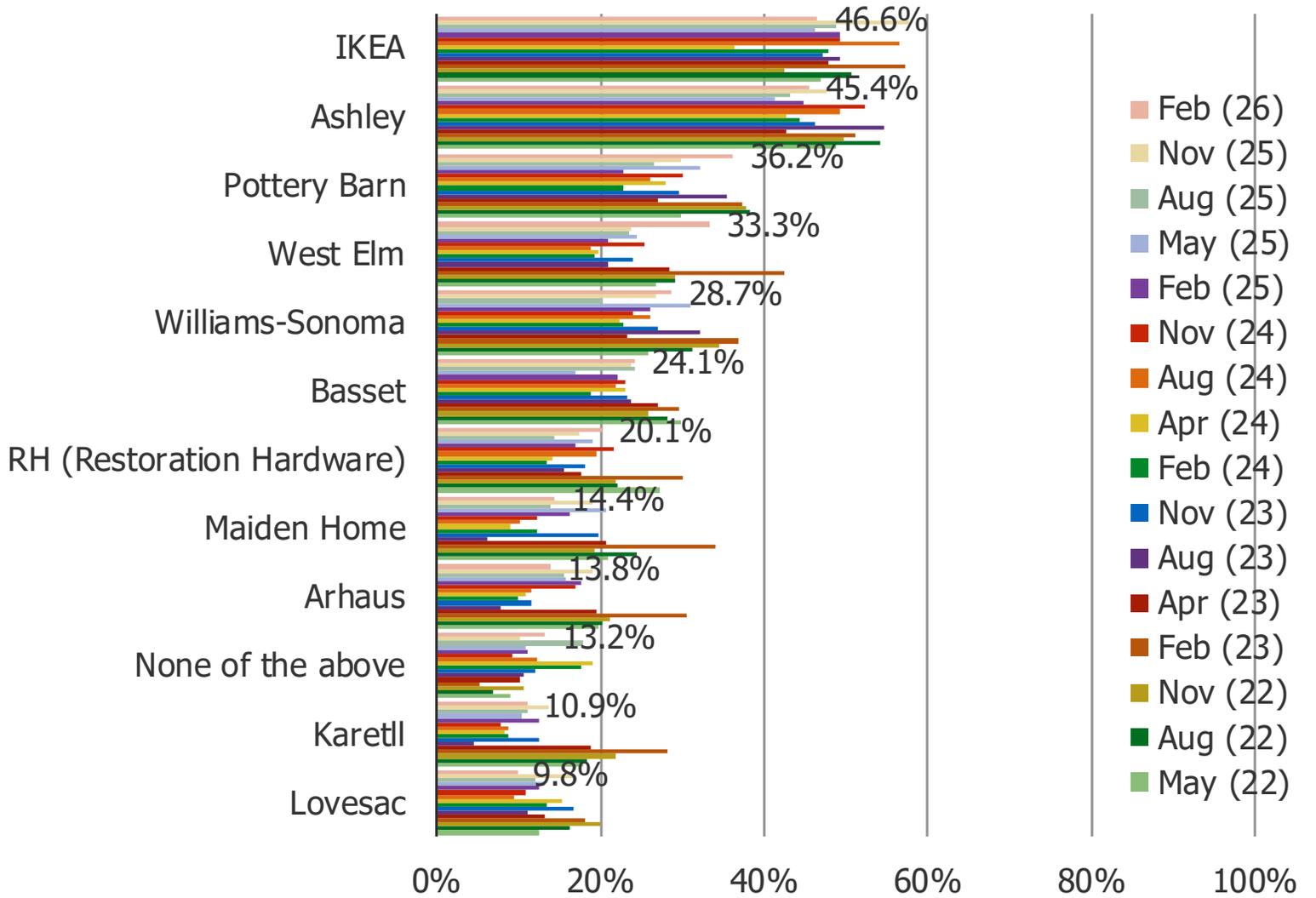
Posed to all respondents.



Mattresses and Furniture

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

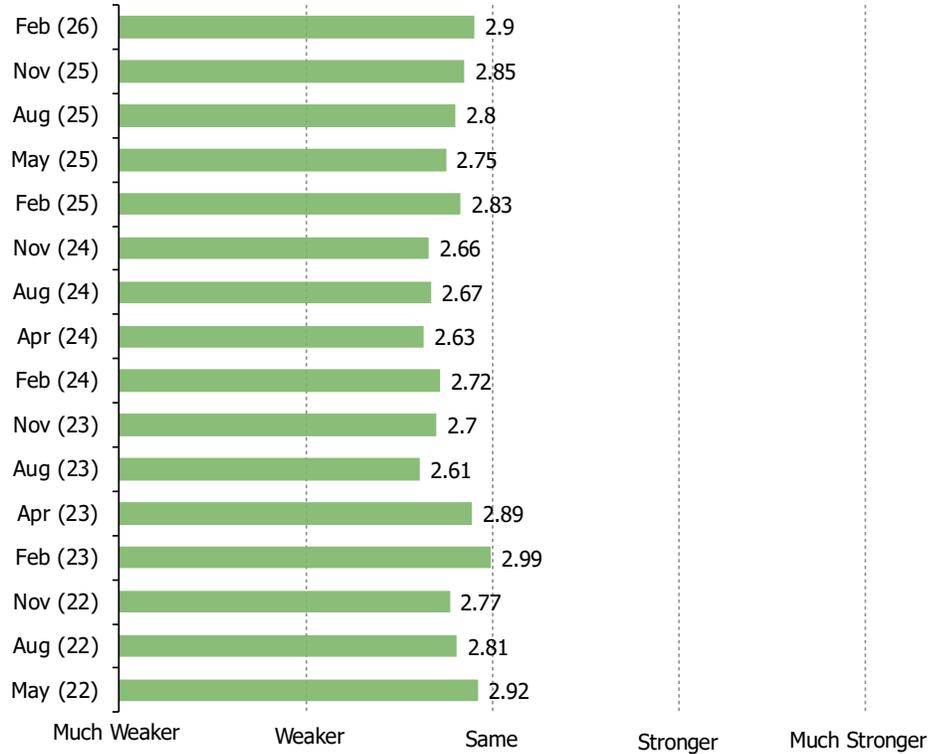
Posed to respondents with household incomes of \$100k and above (N = 174)



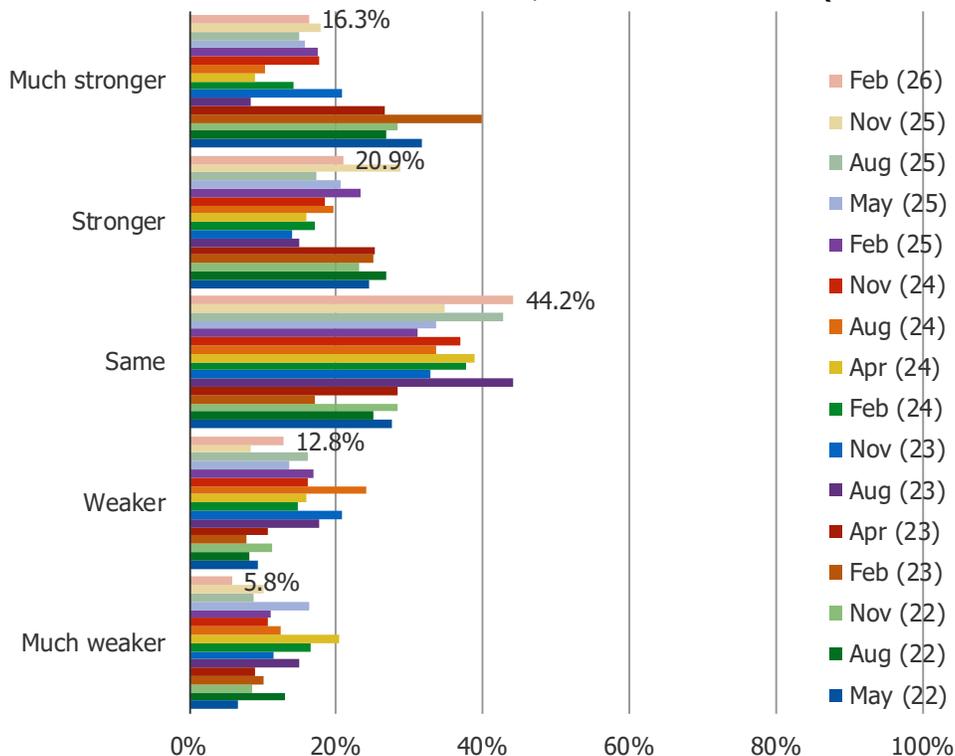
Mattresses and Furniture

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 = 172)



WHY IS YOUR INTEREST IN BUYING LUXURY FURNITURE THIS YEAR STRONGER THAN NORMAL?

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

Quarter	Better Quality & Durability	Aesthetics / Style / Nicer Things	Need to Replace Old Furniture	More Disposable Income	Moving / New Home	Redecorating / Upgrading
2022Q2	12.05%	15.96%	6.19%	6.51%	2.61%	1.95%
2022Q3	13.33%	17.50%	8.33%	7.92%	1.67%	3.33%
2022Q4	14.41%	17.12%	8.56%	5.86%	1.80%	4.05%
2023Q1	14.48%	17.93%	7.93%	7.24%	5.17%	3.10%
2023Q2	16.95%	13.56%	8.05%	4.66%	4.24%	4.24%
2023Q3	16.67%	12.67%	7.33%	7.33%	2.67%	4.00%
2023Q4	14.58%	11.98%	7.81%	3.65%	2.60%	5.73%
2024Q1	16.67%	14.58%	10.42%	3.12%	5.21%	3.12%
2024Q2	18.90%	14.02%	10.37%	4.88%	6.10%	3.66%
2024Q3	20.99%	12.15%	8.84%	4.97%	2.76%	3.31%
2024Q4	13.33%	11.52%	12.73%	7.27%	6.06%	3.03%
2025Q1	16.41%	11.79%	9.74%	5.13%	3.59%	2.05%
2025Q2	19.61%	13.73%	8.82%	6.37%	3.43%	2.94%
2025Q3	17.91%	10.45%	8.96%	6.47%	5.47%	1.99%
2025Q4	14.57%	10.93%	6.88%	6.88%	3.64%	3.64%
2026Q1	14.29%	10.39%	9.09%	5.63%	3.90%	4.33%
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R-Squared	0.092	0.009	0.069	0	0.008	0.058
P-Value	0.253	0.726	0.324	0.982	0.737	0.368
Trend	Up	Down	Up	Down	Up	Up

Part 1: Why is interest in buying luxury furniture STRONGER than normal?

Key Takeaways:

- **Quality is the #1 Driver:** When consumers feel *more* inclined to buy luxury furniture, the primary reason is a desire for **Better Quality & Durability** (15.9%). They view luxury as an investment in longevity rather than just a status symbol.
- **Aesthetics & Replacement:** The next biggest drivers are wanting nicer looking aesthetics (14.1%) and the physical need to replace old/broken furniture (8.7%).
- **Lack of Changing Trends:** There are almost no statistically significant shifts in *why* people are buying. The reasons have remained highly consistent from 2022 to early 2026.

*Data on this page analyzed via LLM.

WHY IS YOUR INTEREST IN BUYING LUXURY FURNITURE THIS YEAR WEAKER THAN NORMAL?

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

Quarter	Lack of Income / Can't Afford	Too Expensive / High Prices	Inflation / Economy / Cost of Living	Don't Need It / No Space / Pets & Kids	Not Interested in Luxury	Not Worth It / Practical
2022Q2	22.99%	15.22%	24.18%	6.27%	3.58%	2.09%
2022Q3	23.55%	15.41%	24.13%	6.69%	5.23%	3.20%
2022Q4	24.26%	17.75%	22.49%	7.99%	2.96%	2.37%
2023Q1	25.60%	15.70%	20.82%	7.85%	4.78%	2.05%
2023Q2	25.34%	17.47%	21.23%	8.90%	2.74%	1.71%
2023Q3	23.26%	19.79%	18.45%	9.09%	2.67%	3.21%
2023Q4	22.55%	19.36%	20.16%	9.55%	3.45%	1.59%
2024Q1	23.46%	18.77%	16.42%	8.21%	5.28%	2.35%
2024Q2	24.19%	22.31%	15.59%	11.02%	2.69%	2.15%
2024Q3	24.86%	17.88%	15.36%	13.41%	2.23%	3.07%
2024Q4	23.03%	20.79%	16.29%	10.96%	4.21%	3.09%
2025Q1	24.55%	23.47%	18.41%	9.39%	3.61%	3.25%
2025Q2	23.10%	23.71%	14.59%	11.55%	1.82%	2.43%
2025Q3	25.25%	24.24%	12.12%	10.77%	2.36%	2.02%
2025Q4	25.49%	24.18%	14.05%	13.40%	1.96%	2.29%
2026Q1	27.04%	23.70%	11.11%	14.81%	2.22%	3.33%
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R-Squared	0.002	0.377	0.57	0.319	0.033	0.139
P-Value	0.856	0.011	0.001	0.023	0.501	0.155
Trend	Up	UP	DOWN	UP	Down	Up

Part 2: Why is interest in buying luxury furniture WEAKER than normal?

Key Takeaways:

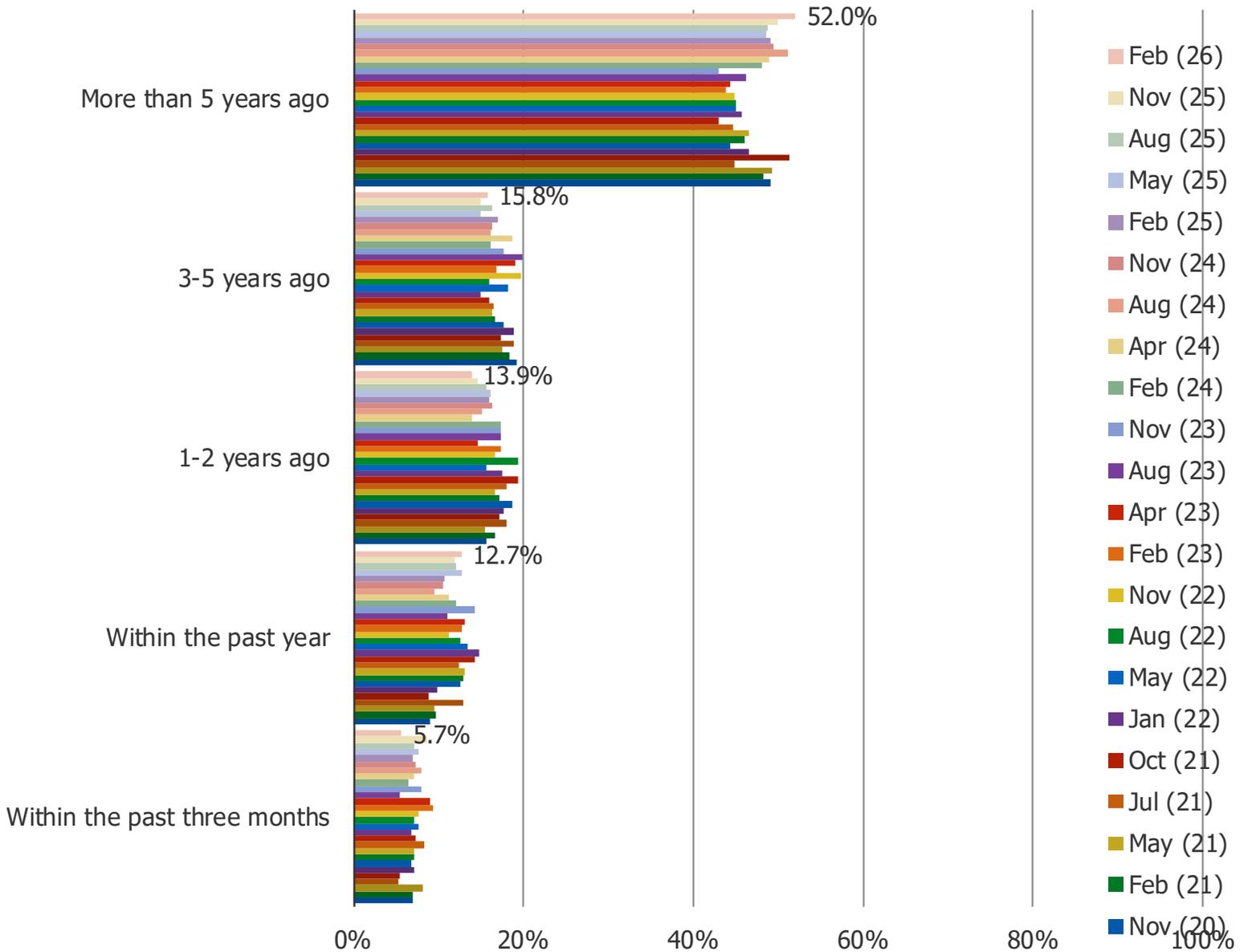
- **The Squeeze:** Over 60% of all negative responses explicitly mention that consumers do not have the money, the prices are too high, or the economy/inflation is holding them back.
- **Shifting Blame (Statistically Significant):** There is a mathematically significant shift happening in how consumers talk about their lack of purchasing power. Mentions of macro "Inflation / Economy" are dropping rapidly ($p = 0.001$), while direct complaints that items are "Too Expensive" are rising ($p = 0.011$). Consumers are pivoting from blaming the general economy to pointing directly at high price tags.
- **Diminishing Need (Statistically Significant):** There is a significant upward trend ($p = 0.023$) in consumers simply stating they "Don't Need" luxury furniture right now, indicating a pullback in discretionary lifestyle upgrading.

*Data on this page analyzed via LLM.

FURNITURE PURCHASING TRENDS

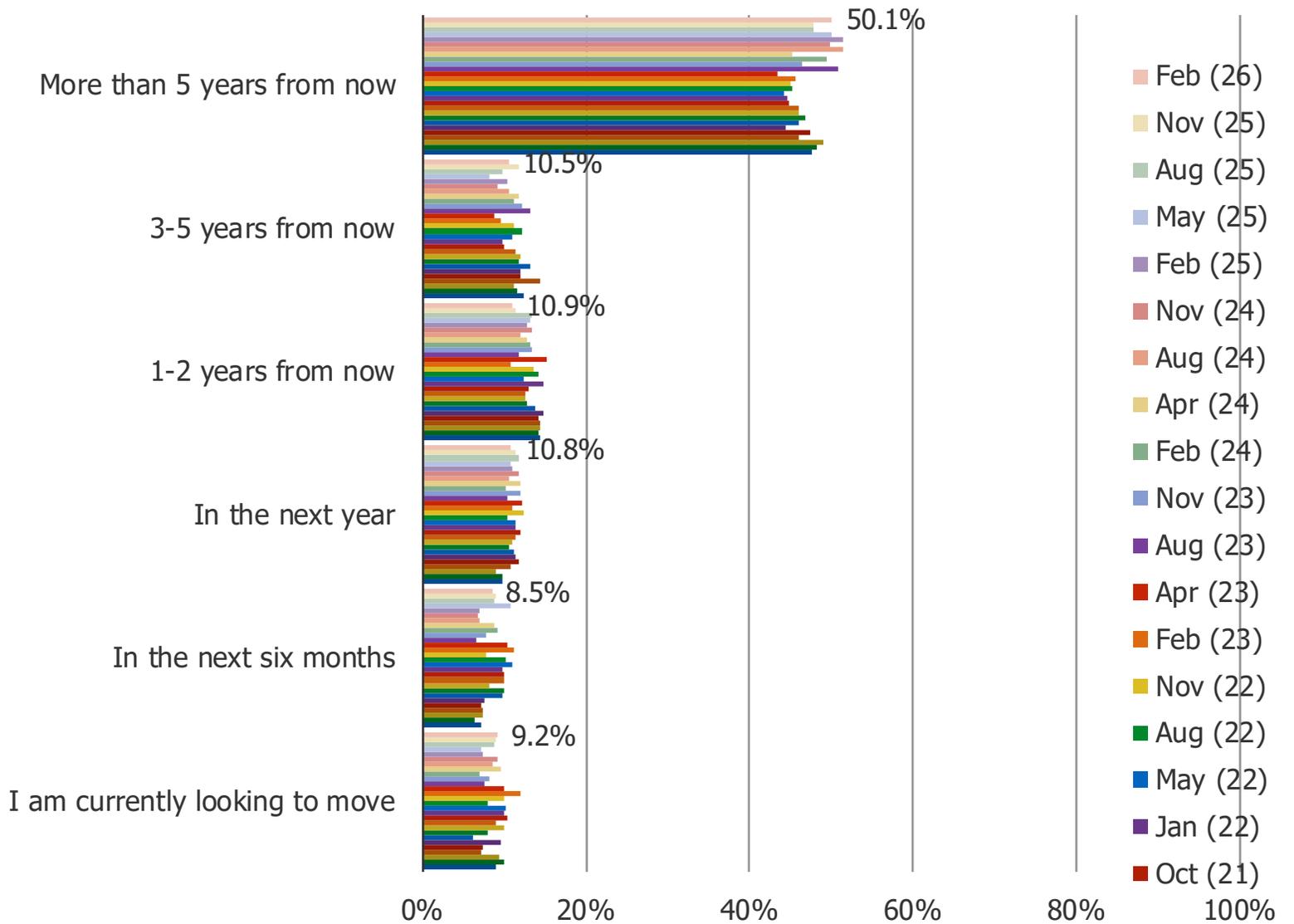
WHEN IS THE LAST TIME YOU MOVED?

Posed to all respondents



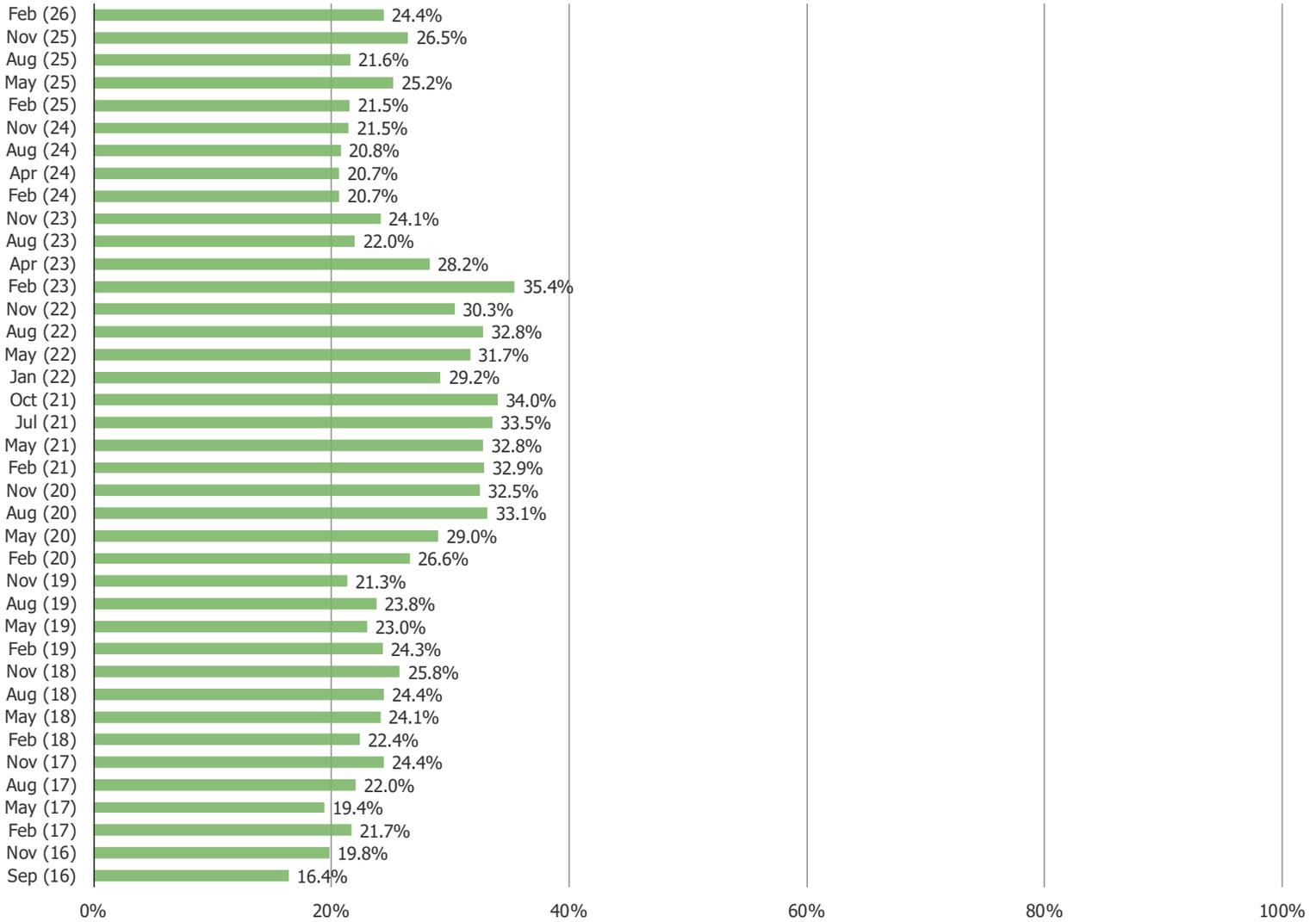
WHEN DO YOU EXPECT TO MOVE AGAIN?

Posed to all respondents



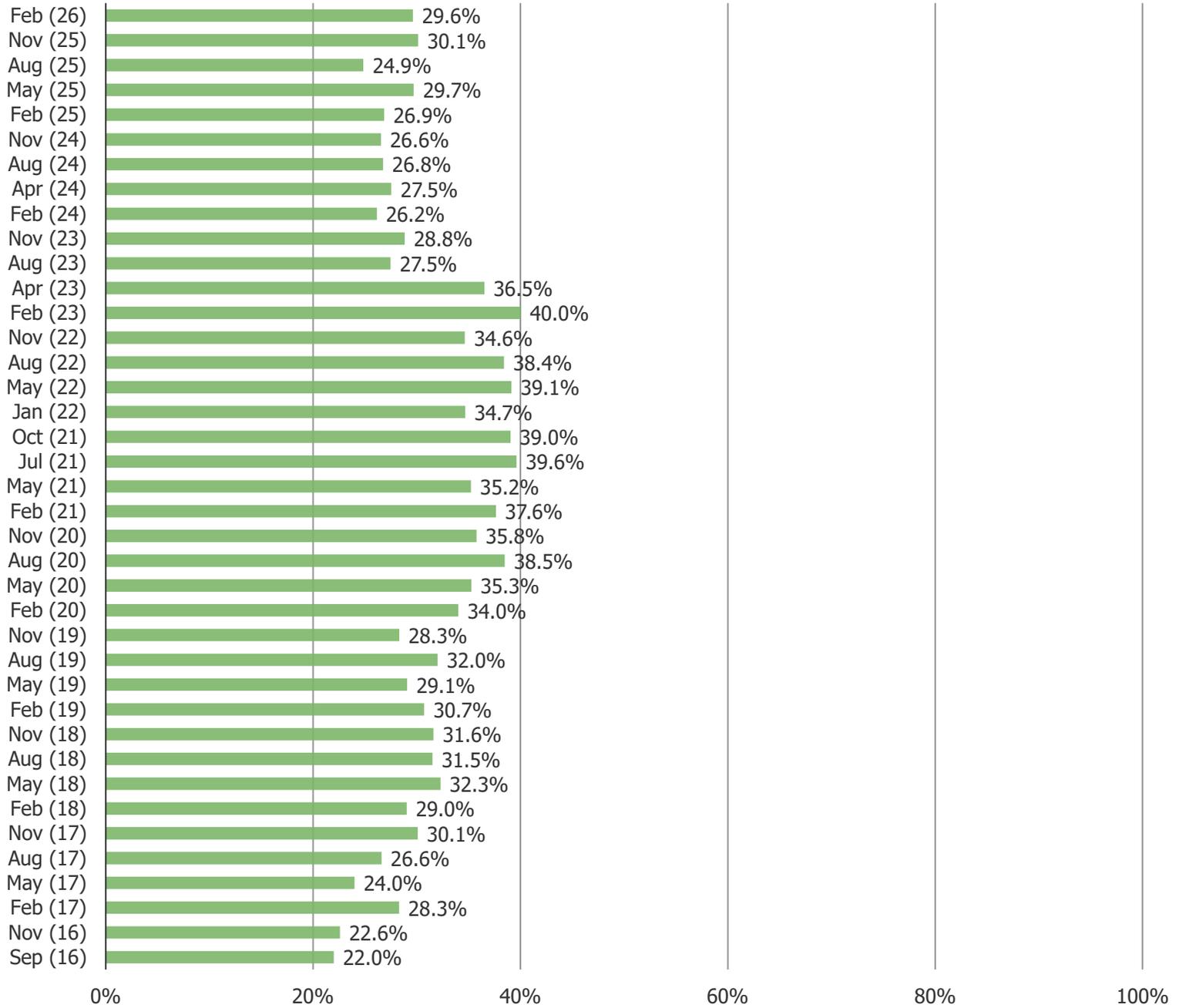
HAVE YOU RENOVATED OR REMODELED YOUR HOME IN THE PAST SIX MONTHS?

Posed to all respondents



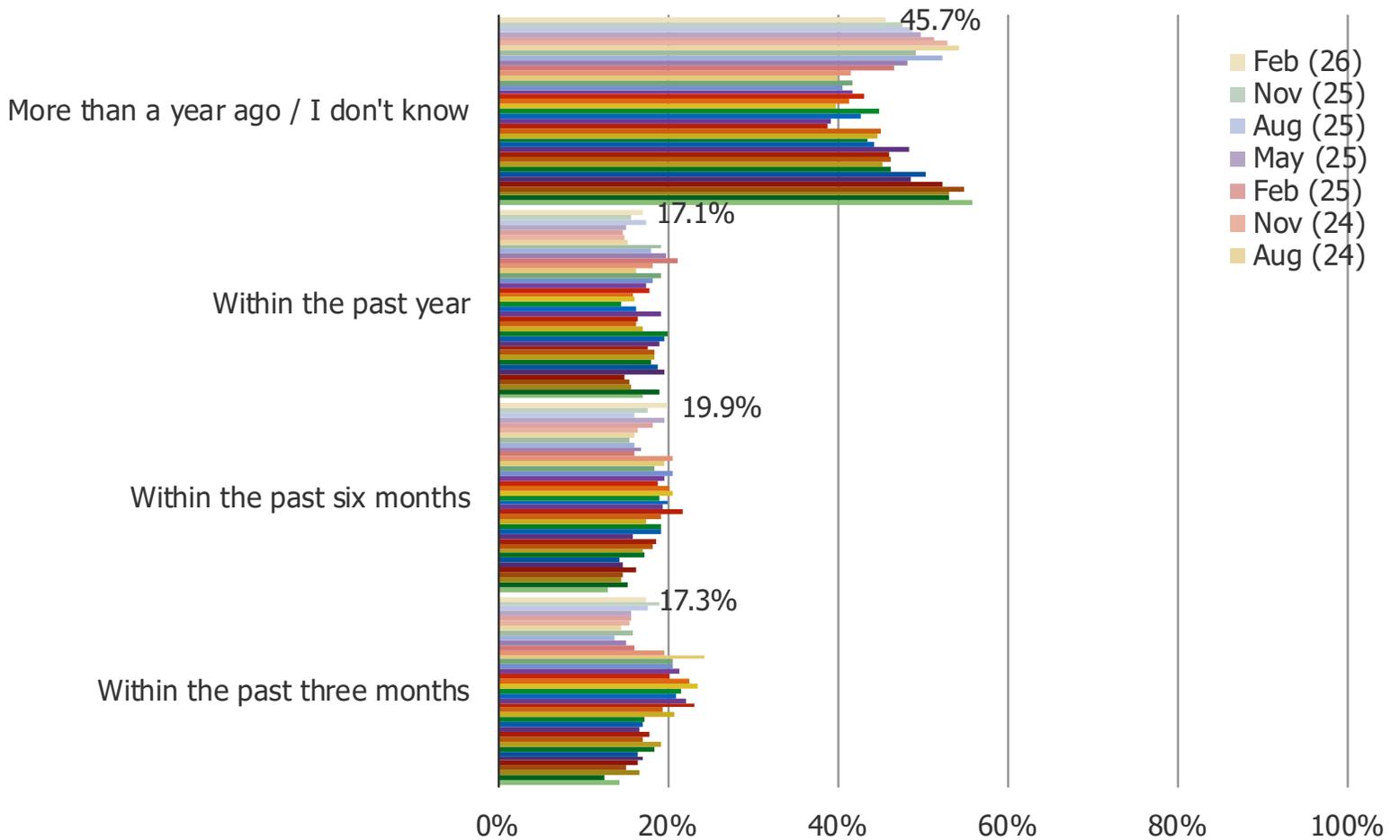
DO YOU PLAN TO RENOVATE OR REMODEL YOUR HOME IN THE NEXT FEW MONTHS?

Posed to all respondents



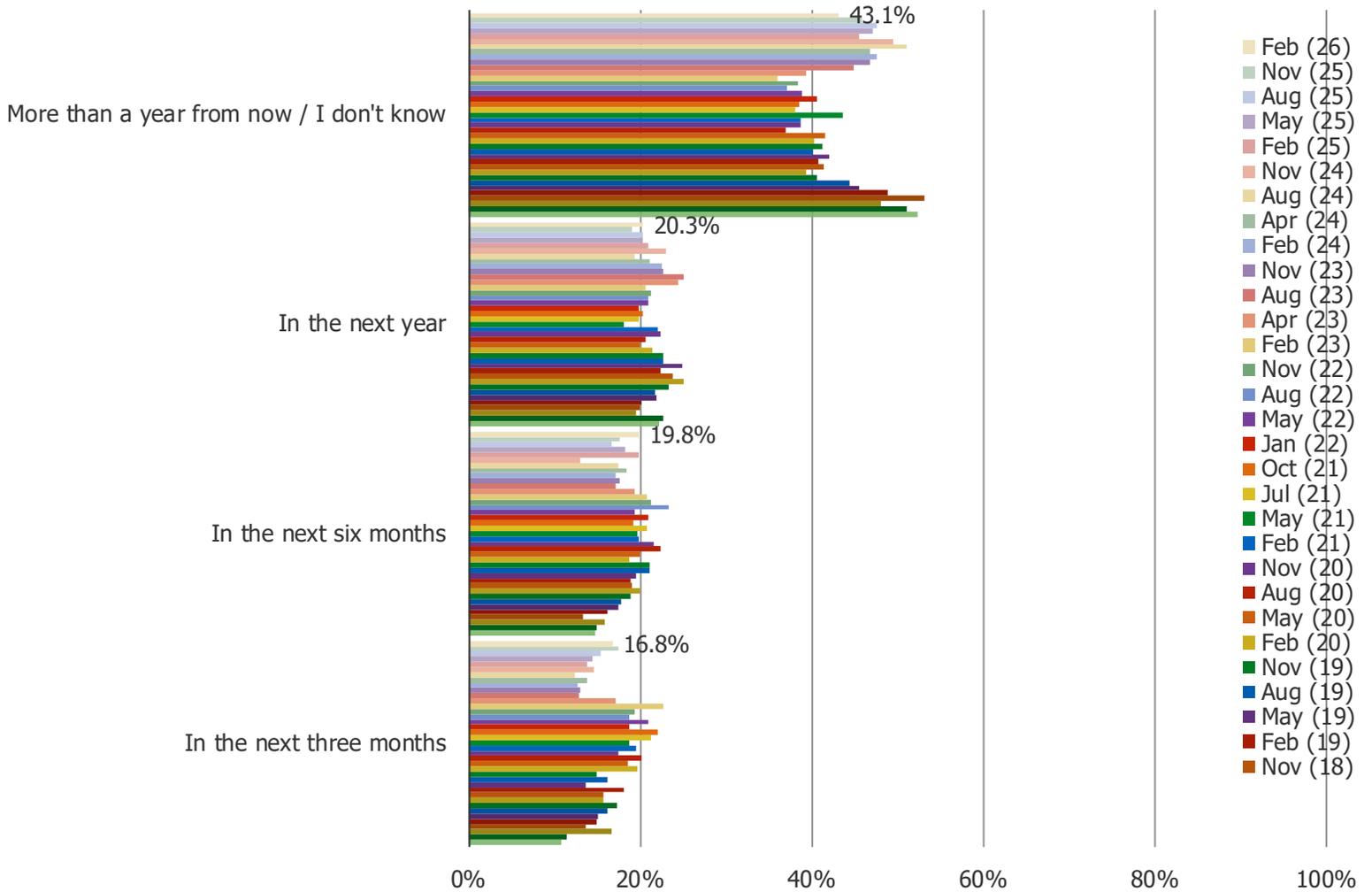
WHEN IS THE LAST TIME YOU PURCHASED FURNITURE FOR YOUR HOME?

Posed to all respondents



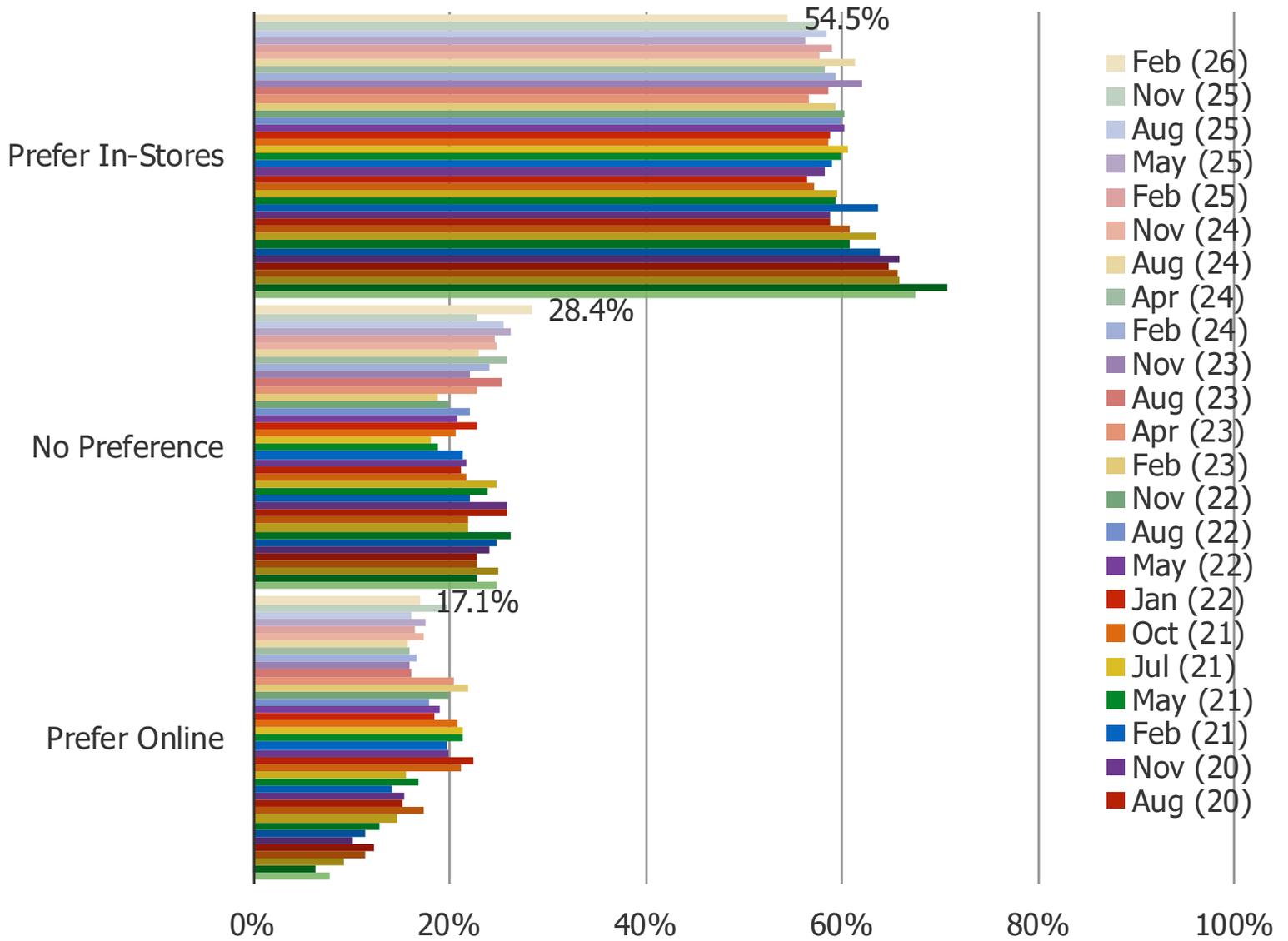
WHEN DO YOU EXPECT TO BUY FURNITURE FOR YOUR HOME NEXT?

Posed to all respondents



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

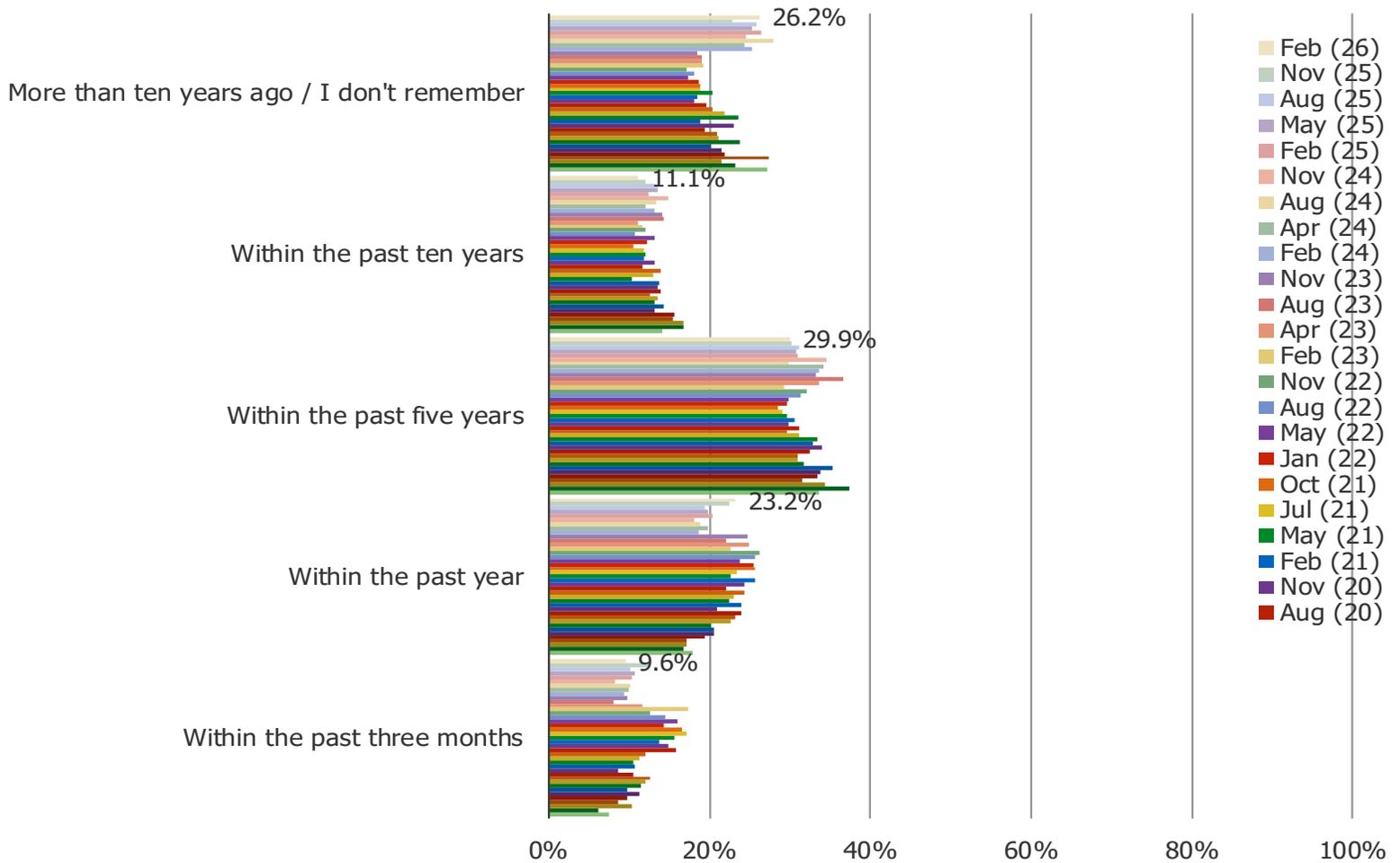
Posed to all respondents



MATTRESSES PURCHASE ACTIVITY

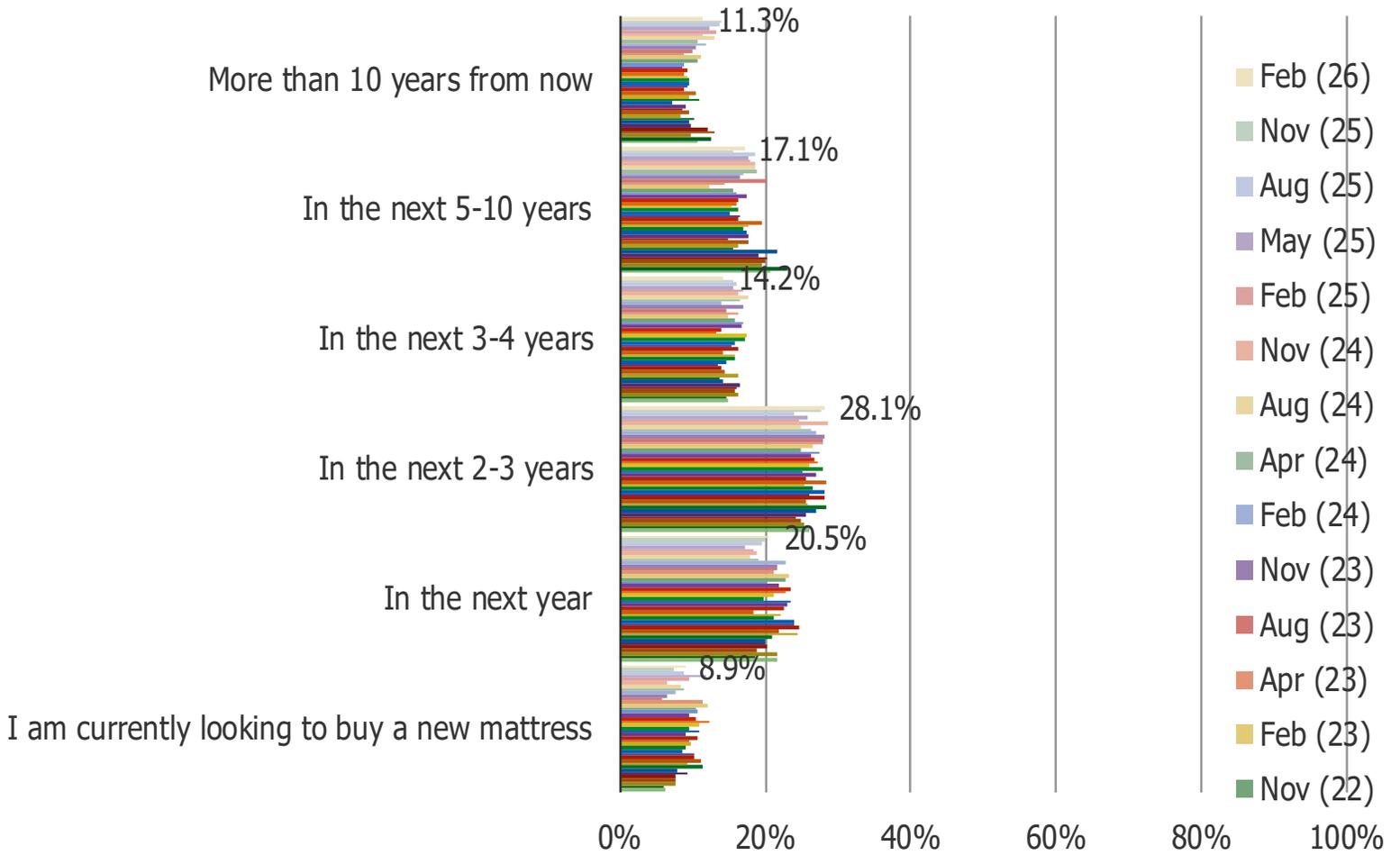
LAST TIME PURCHASED A MATTRESS

Posed to all respondents



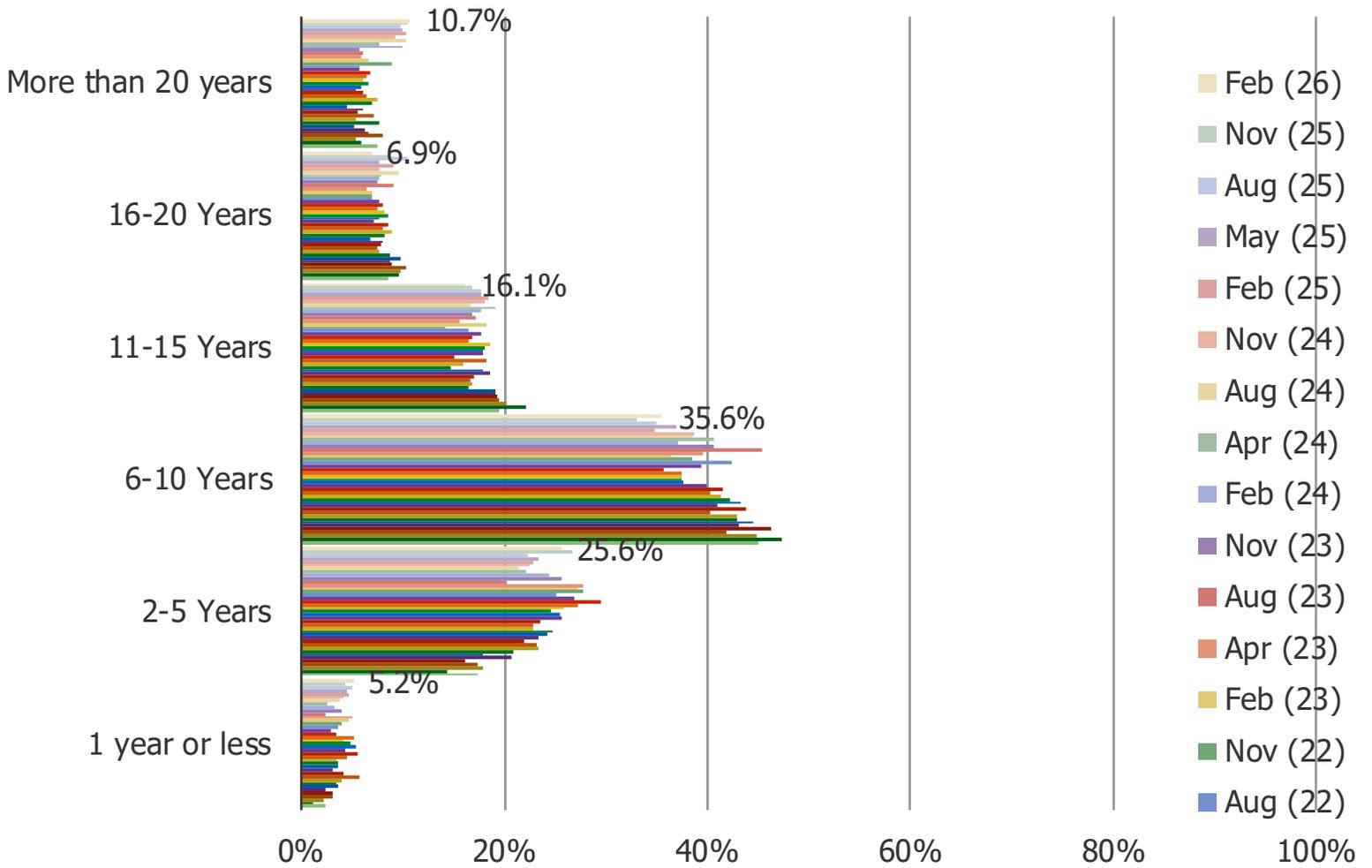
WHEN DO YOU EXPECT TO GET A NEW MATTRESS?

Posed to all respondents



HOW LONG DO YOU BELIEVE MATTRESSES SHOULD LAST?

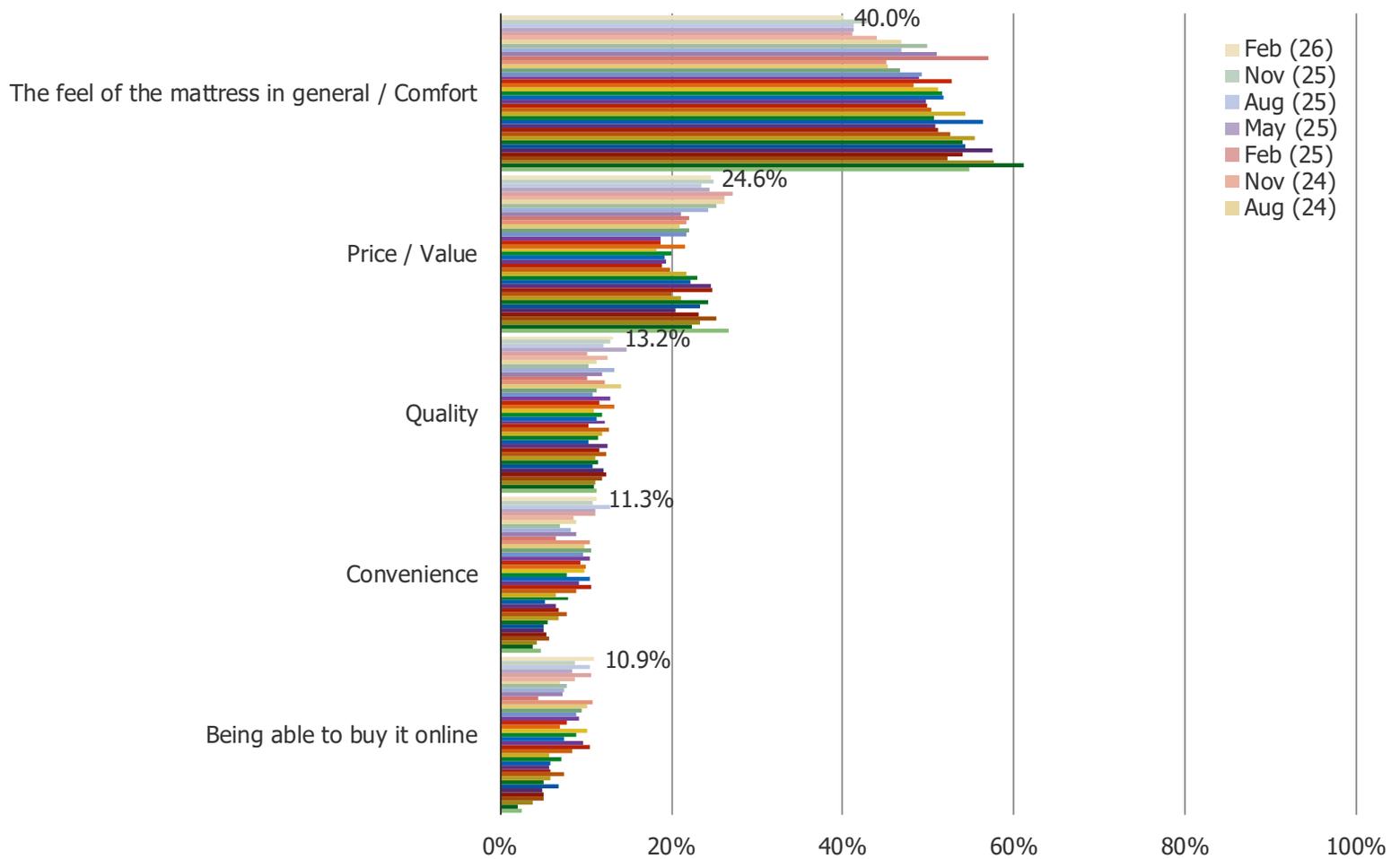
Posed to all respondents



CATALYSTS / DECISION DRIVERS

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

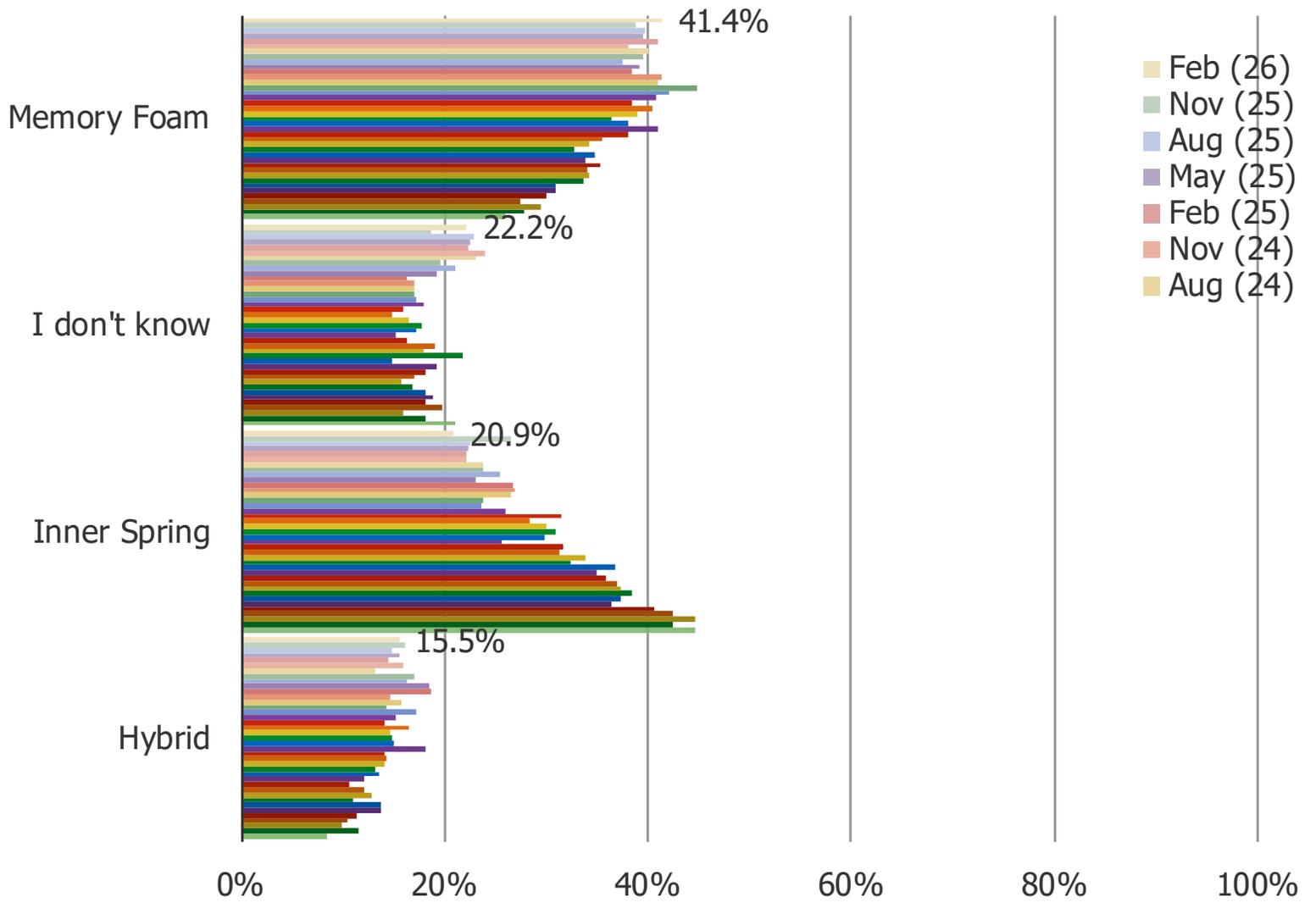
Posed to all respondents



MEMORY FOAM VS. INNER SPRING

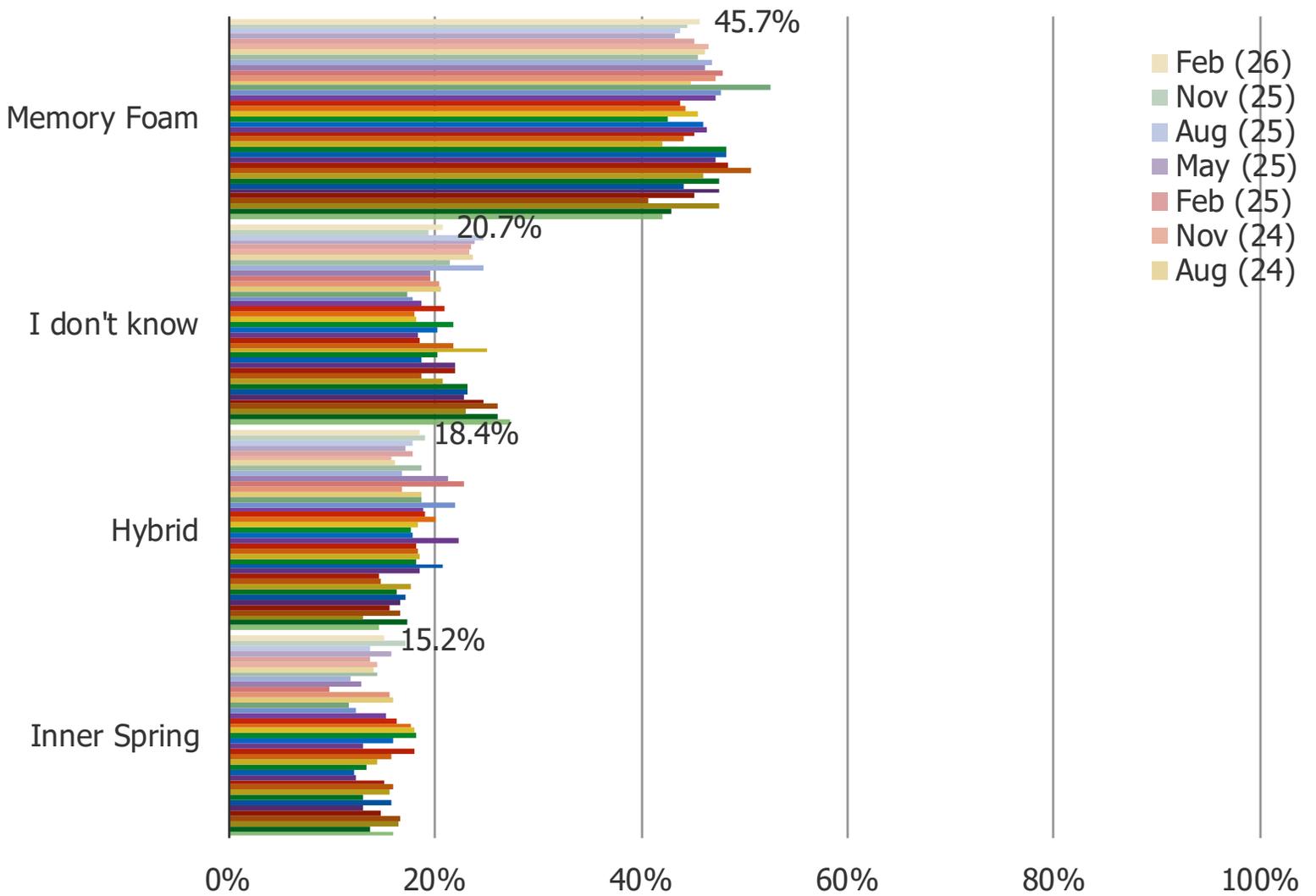
WHICH BEST DESCRIBES THE TYPE OF MATTRESS THAT YOU CURRENTLY SLEEP ON?

Posed to all respondents



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

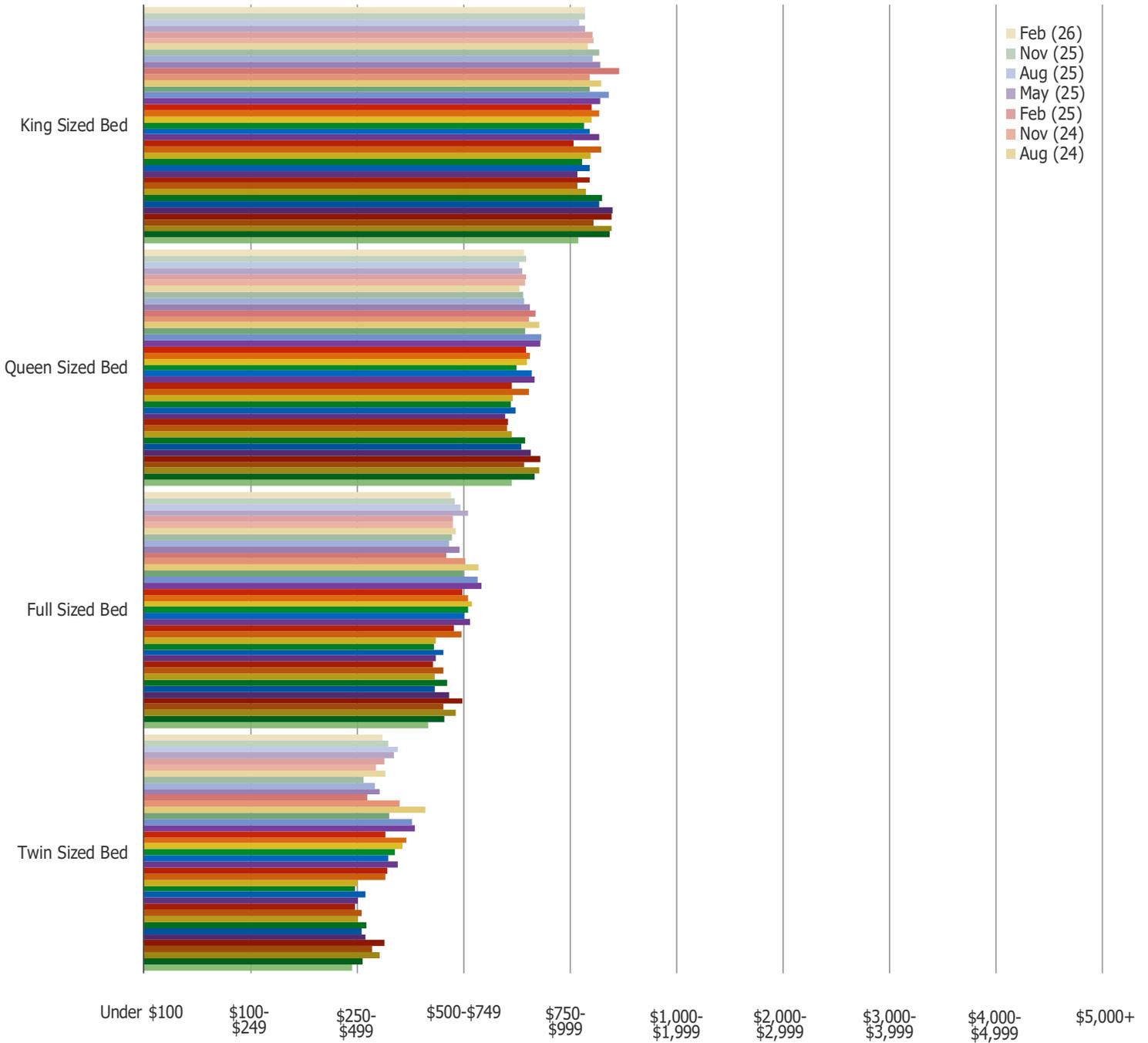
Posed to all respondents



PRICE EXPECTATIONS

EXPECTATIONS FOR SPENDING ON MATTRESSES BY SIZE

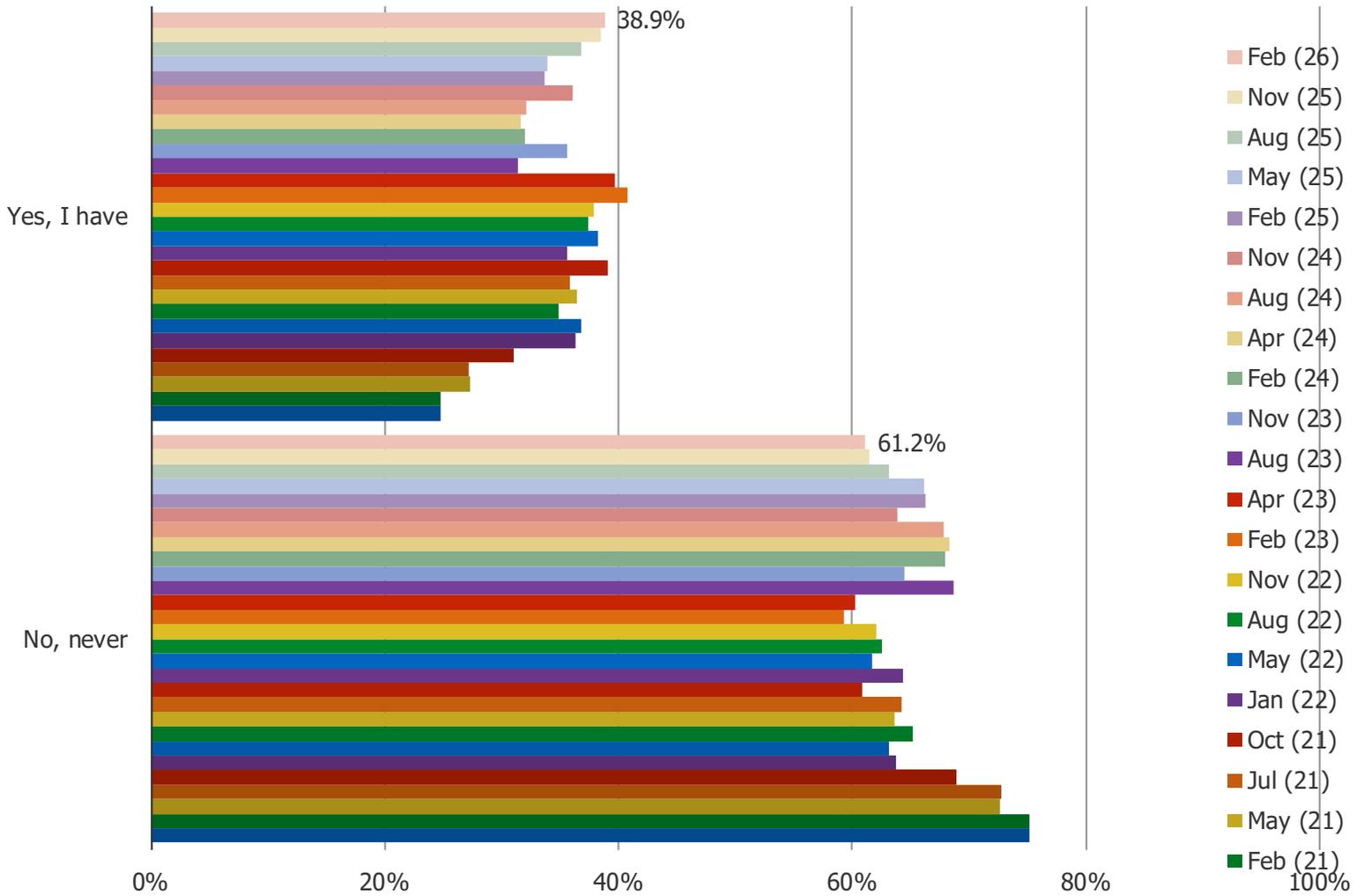
Posed to all respondents



IN-STORE VS. ONLINE

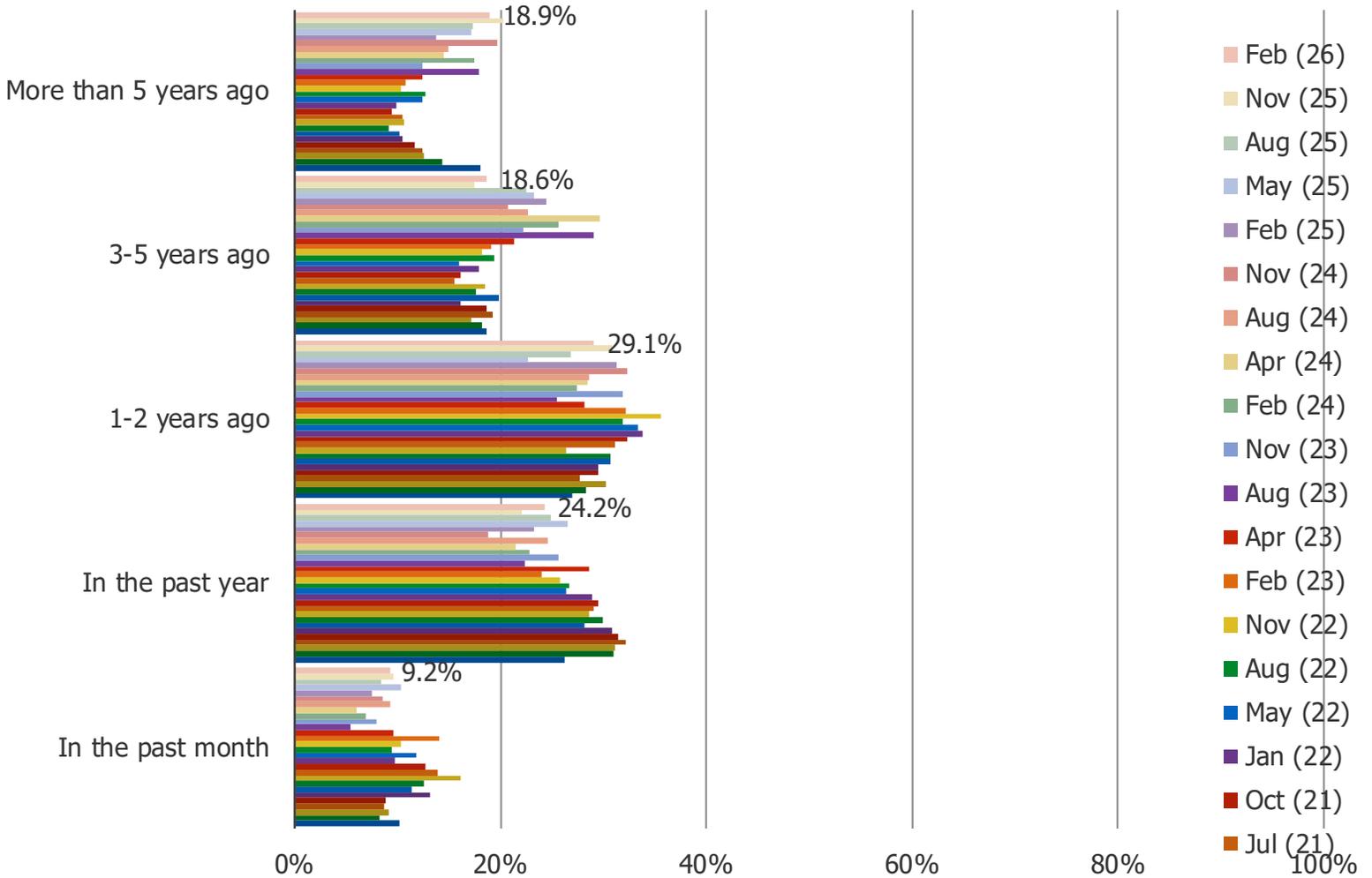
HAVE YOU EVER ORDERED A MATTRESS ONLINE? (IE. A BED-IN-A-BOX MATTRESS)

Posed to all respondents



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

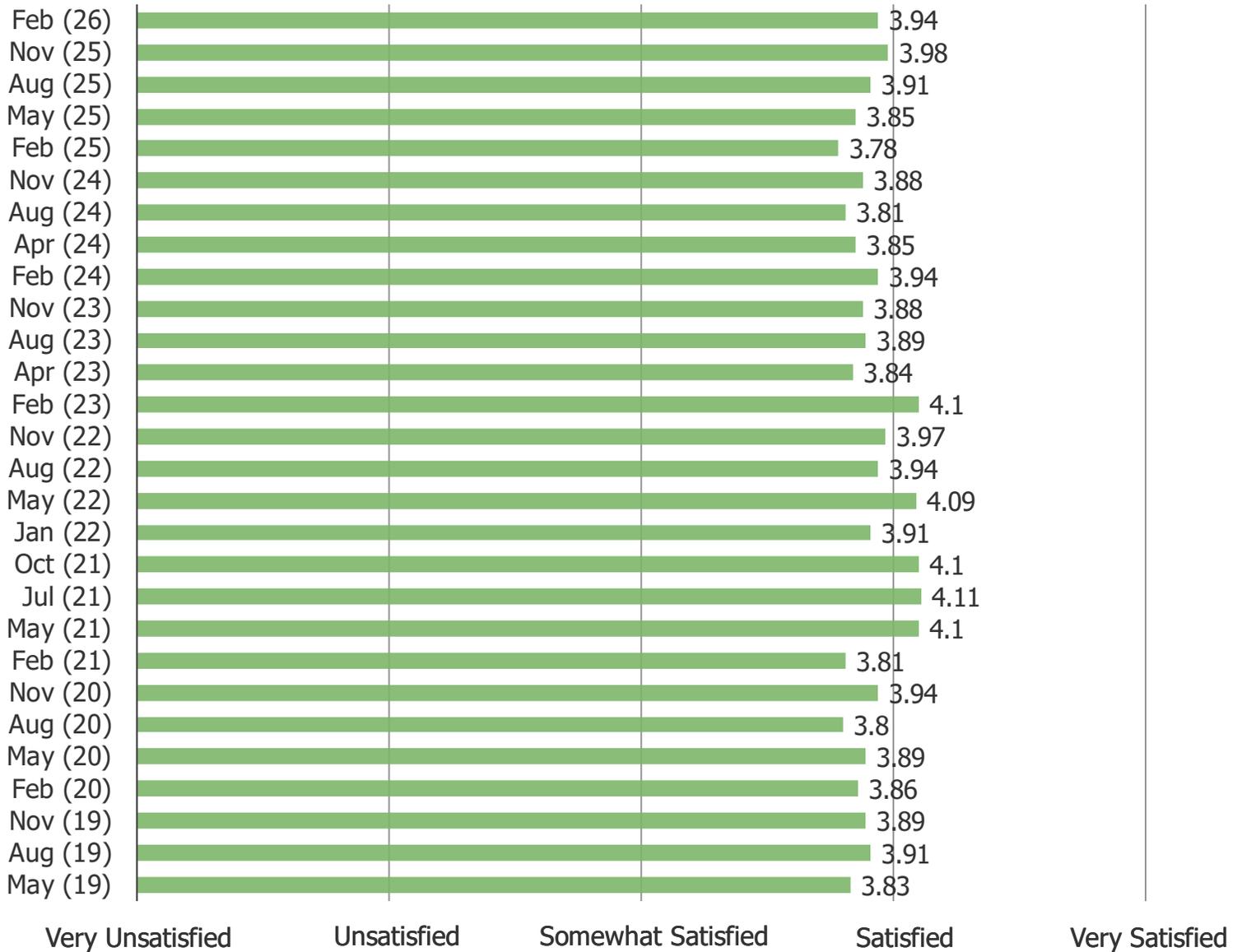
Posed to respondents who have ordered a mattress online



Mattresses and Furniture

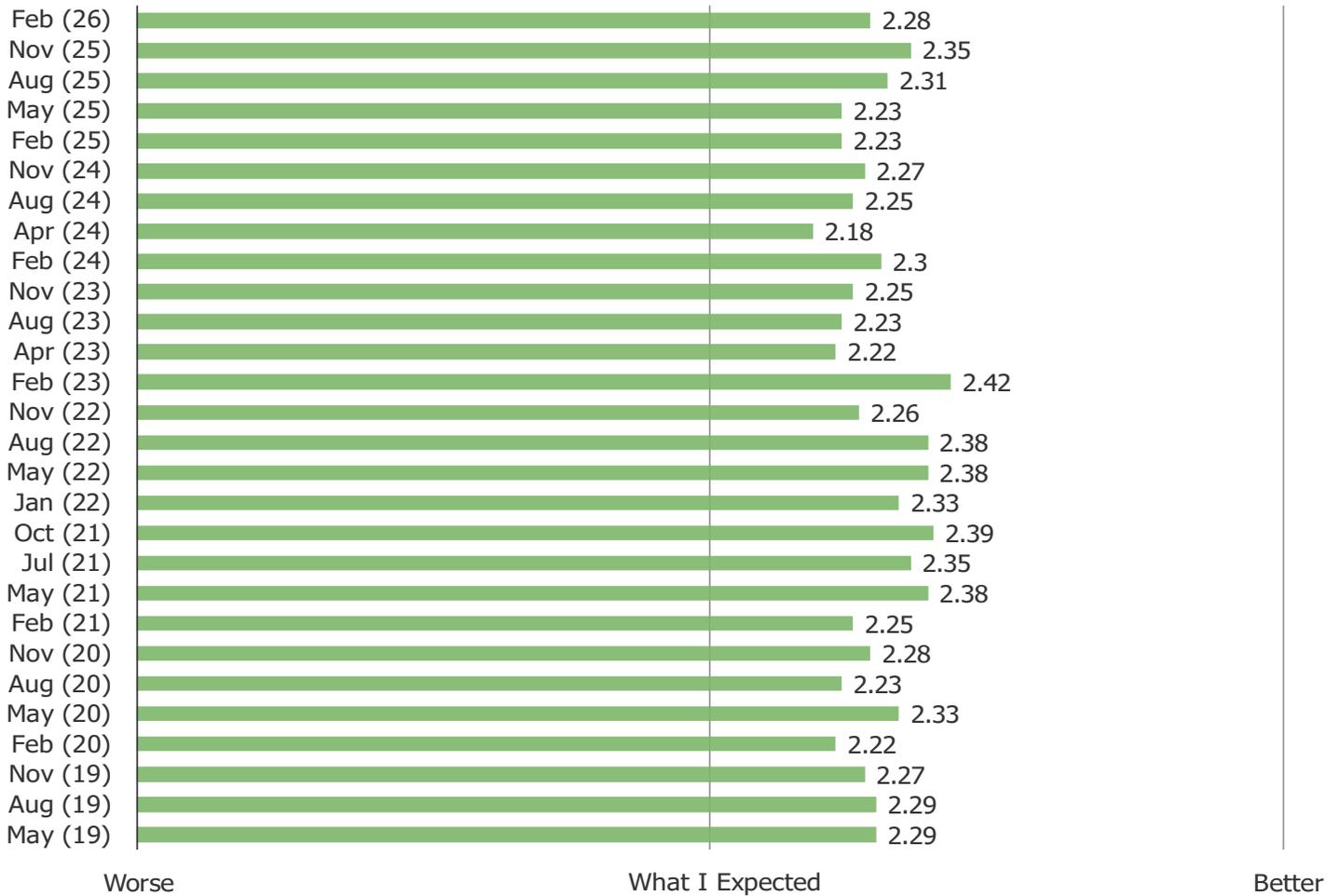
HOW SATISFIED ARE YOU WITH YOUR BED-IN-A-BOX MATTRESS?

Posed to respondents who have ordered a mattress online



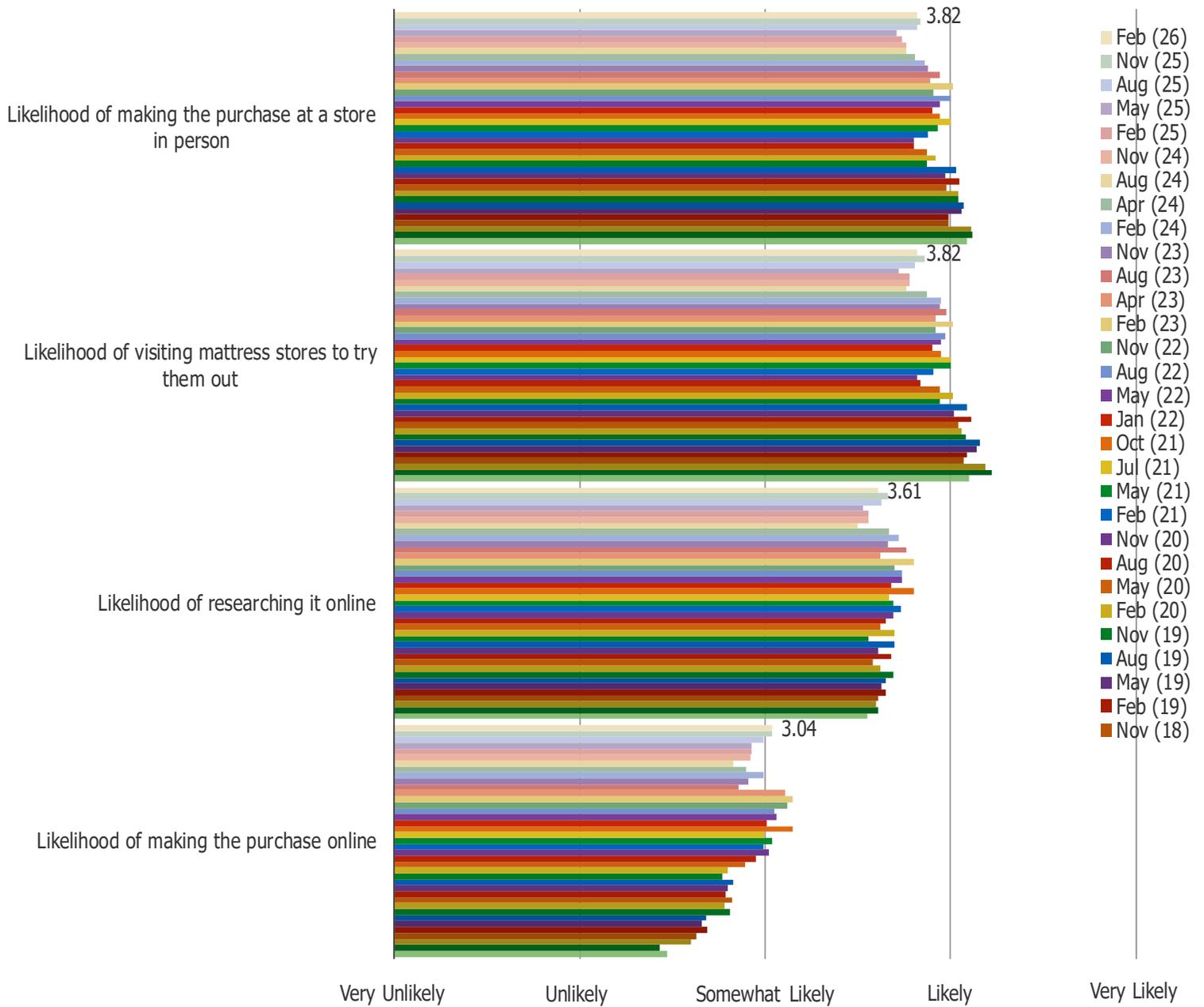
HOW IS THE MATTRESS HOLDING UP OVER TIME COMPARED TO YOUR EXPECTATIONS?

Posed to respondents who have ordered a mattress online



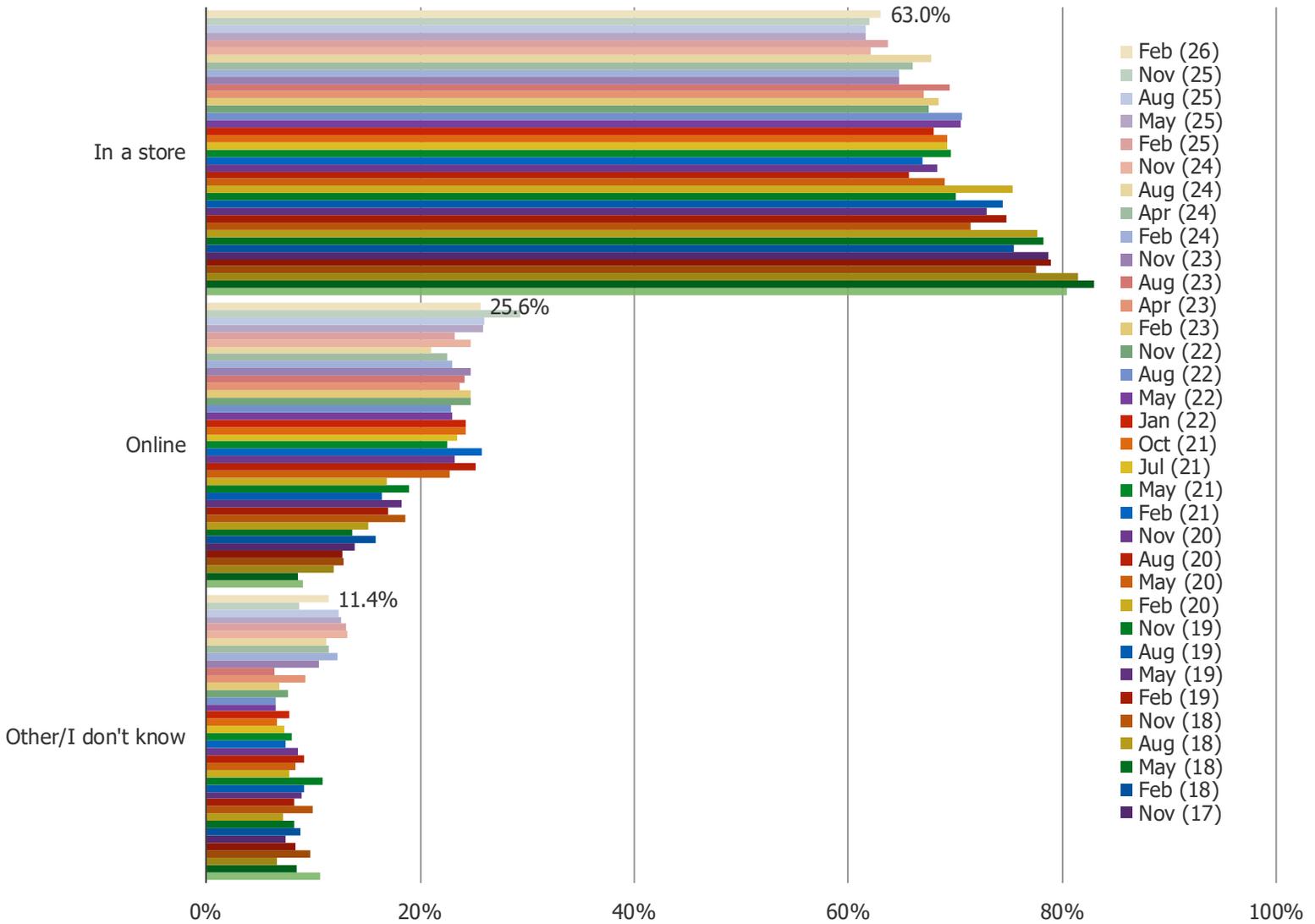
IF YOU NEEDED TO BUY A MATTRESS, HOW LIKELY WOULD YOU BE TO...

Posed to all respondents



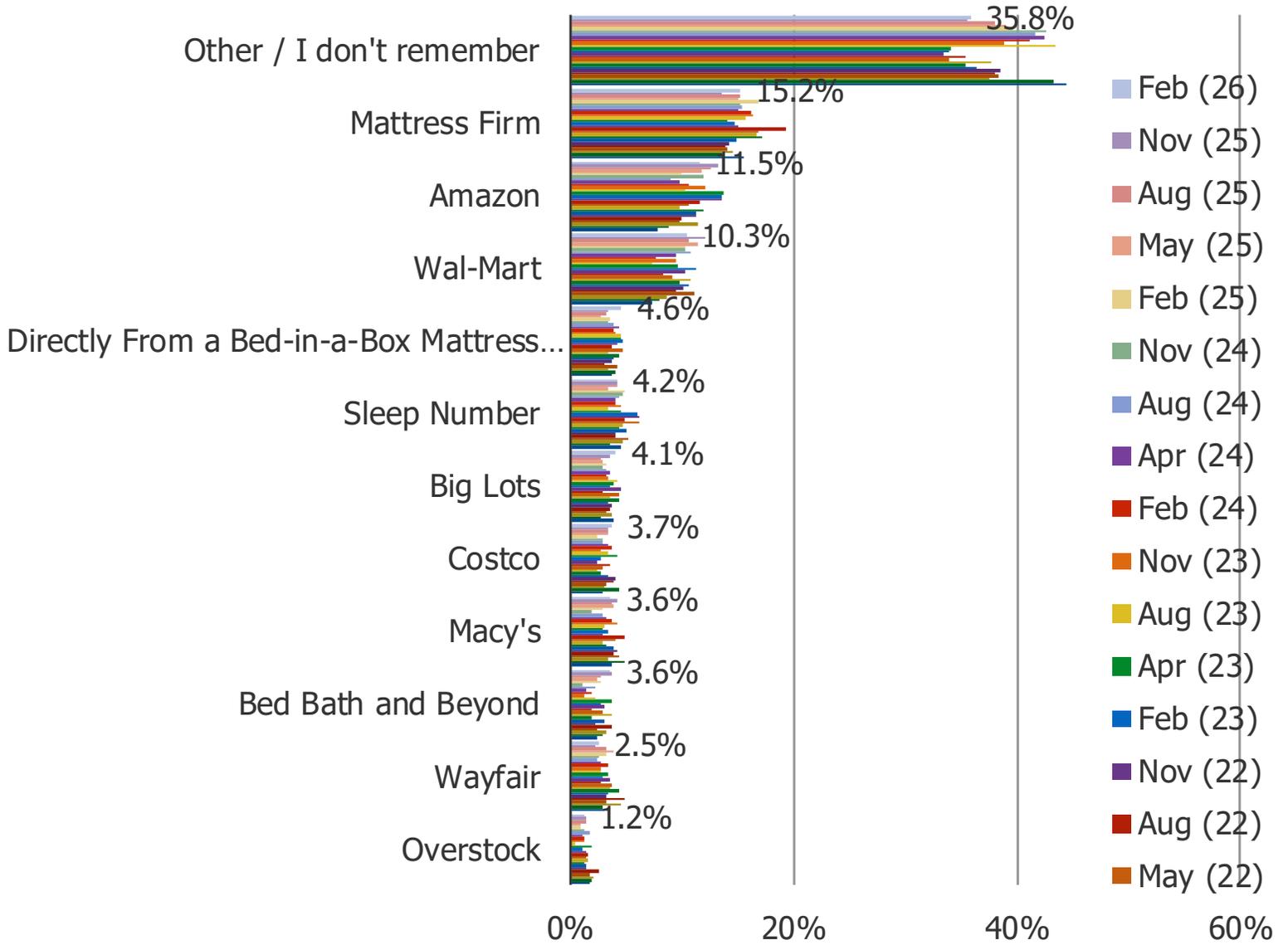
HOW DID YOU PURCHASE THE MOST RECENT MATTRESS THAT YOU BOUGHT?

Posed to all respondents



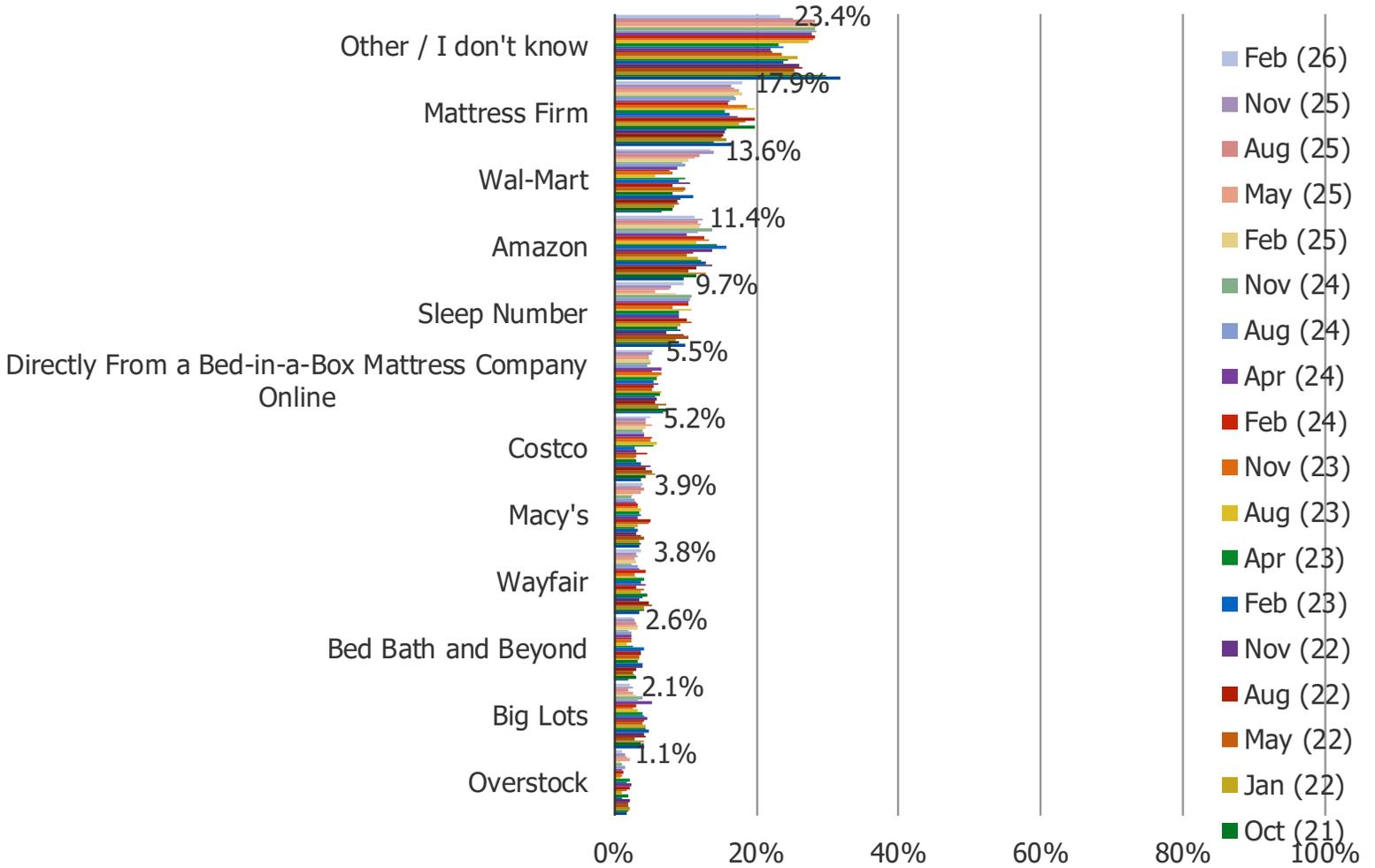
FROM WHICH STORE/WEBSITE DID YOU MAKE YOUR MOST RECENT MATTRESS PURCHASE?

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

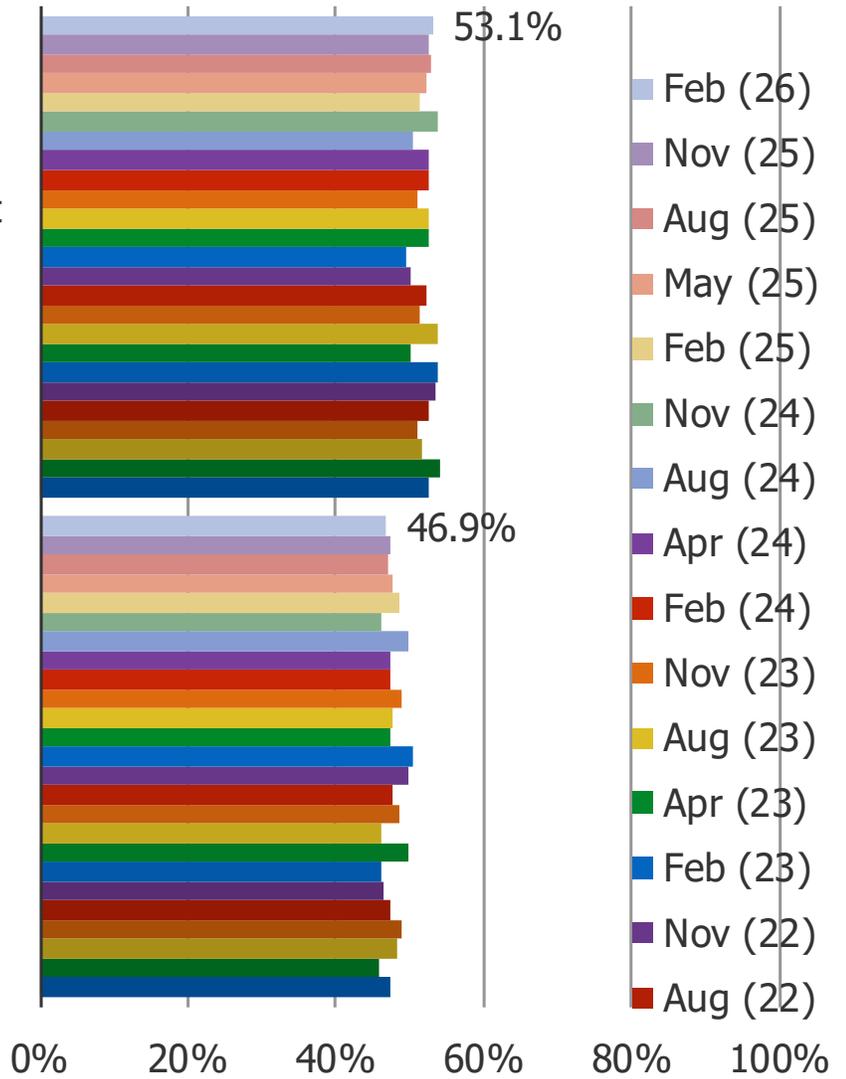


IF YOU NEEDED TO BUY A MATTRESS TODAY, HOW WOULD YOU BEGIN YOUR SEARCH?

Posed to all respondents

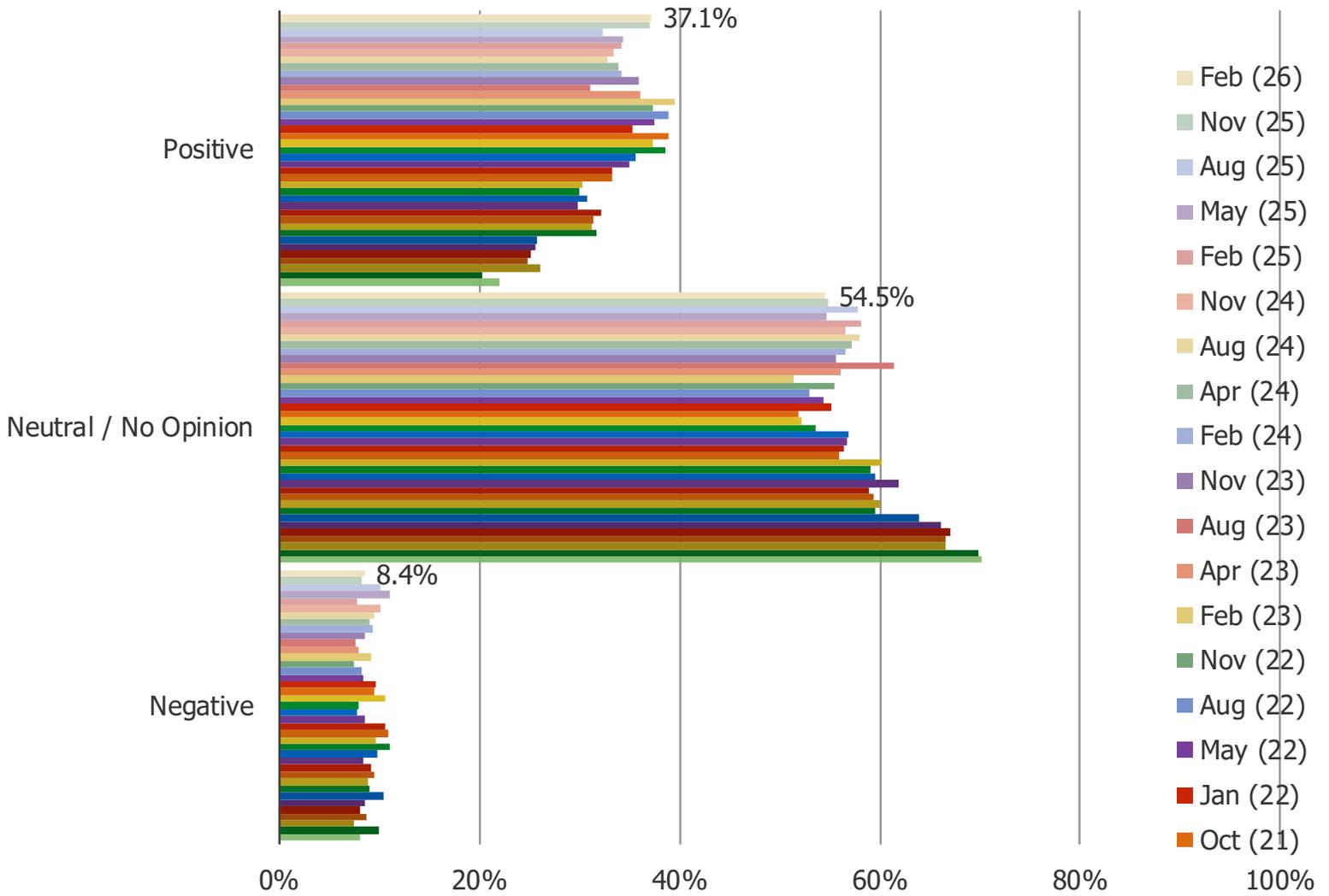
I would find a retailer that sells different mattress brands, and would then evaluate them and choose one

I would research which brand I wanted to buy, and then find a retailer I could buy it from or would buy it directly from the brand



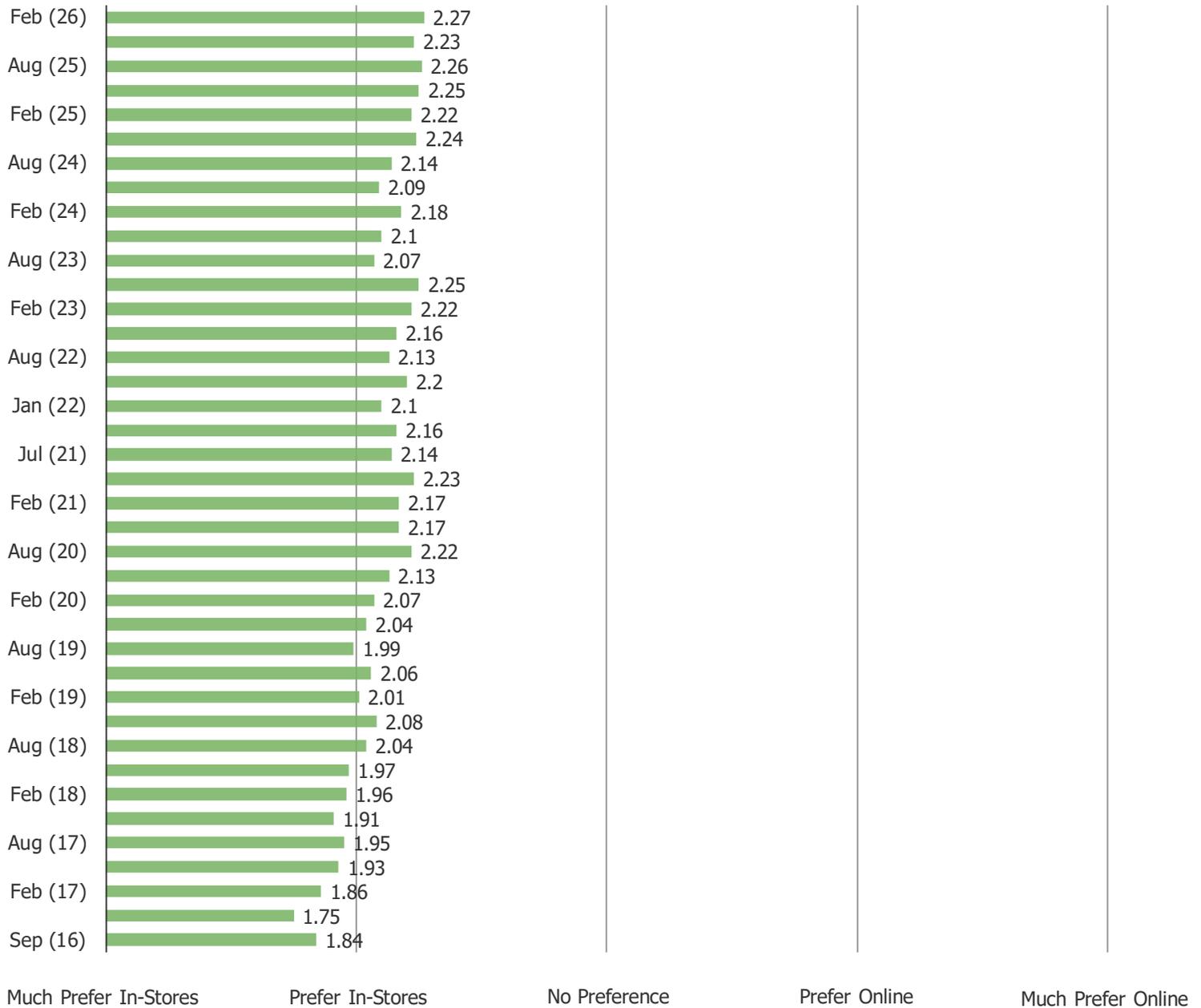
OPINION OF BED IN A BOX MATTRESS PROVIDERS WHO SHIP MATTRESSES TO CUSTOMERS IN A VACUUM SEALED BOX

Posed to all respondents



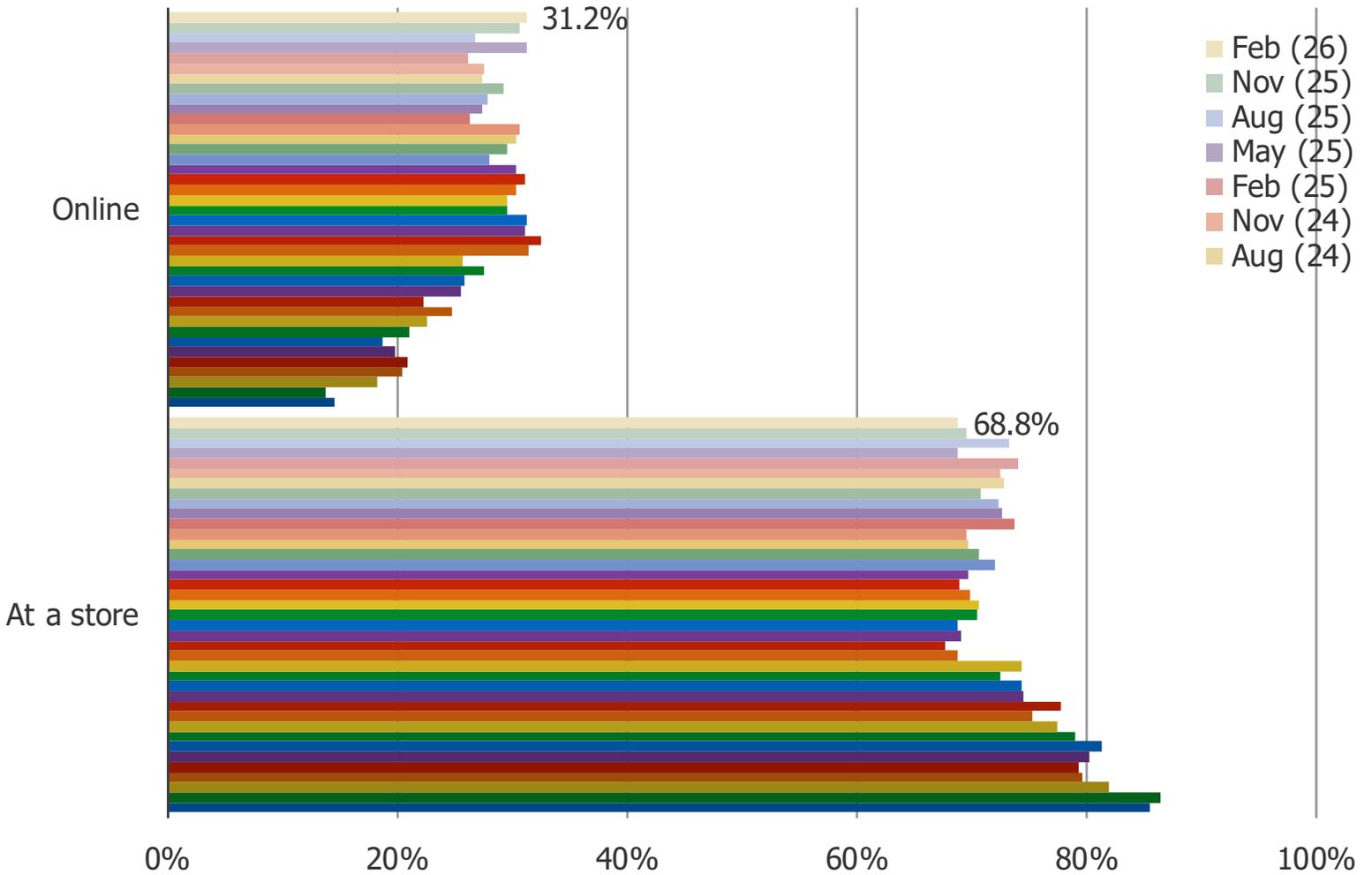
PREFERRED METHOD FOR MATTRESS SHOPPING

Posed to all respondents



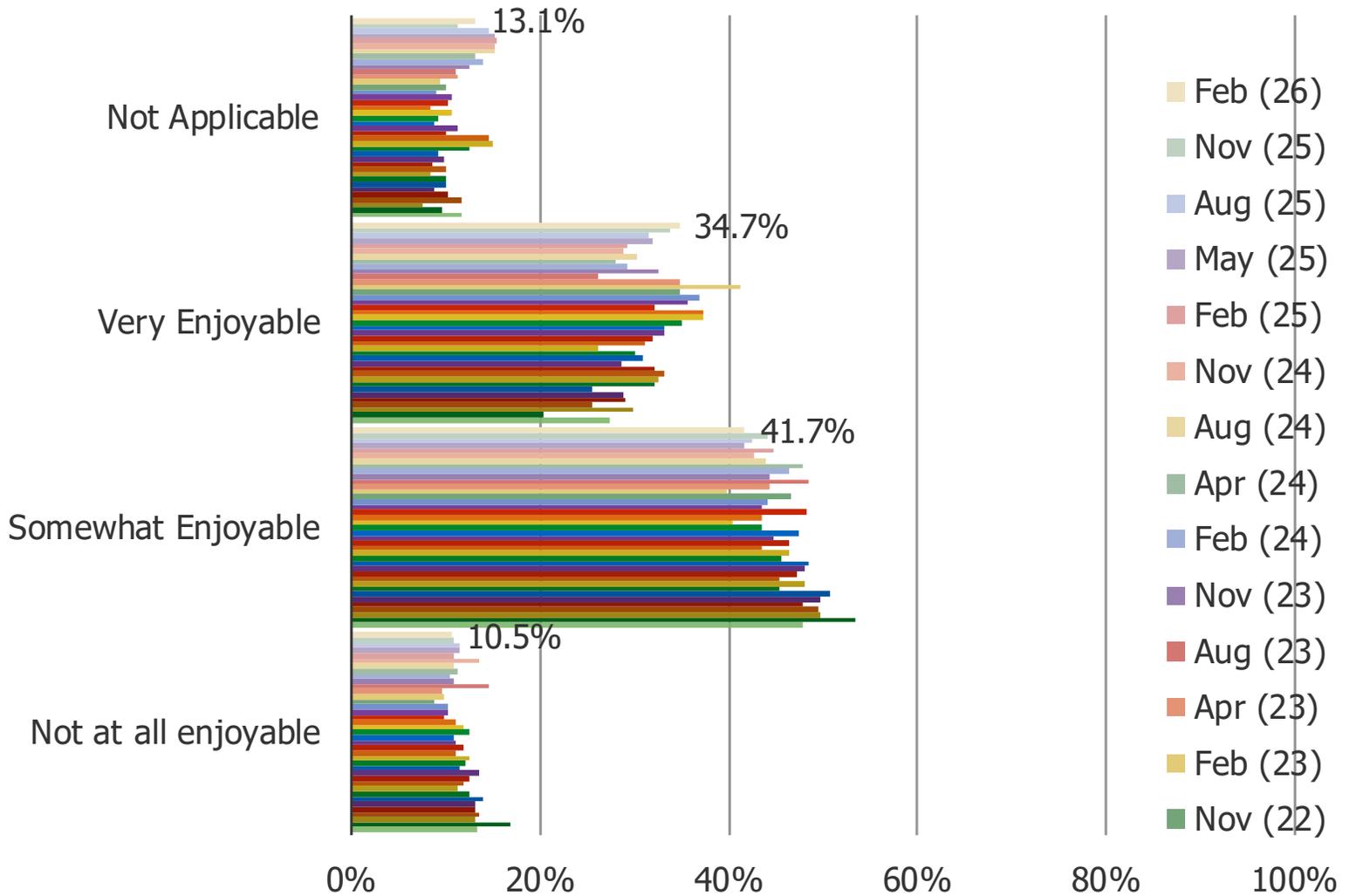
WHEN IT IS TIME TO GET A NEW MATTRESS, DO YOU THINK YOU WILL BUY IT AT A STORE OR ONLINE?

Posed to all respondents



HOW ENJOYABLE DID YOU FIND THE MATTRESS BUYING PROCESS?

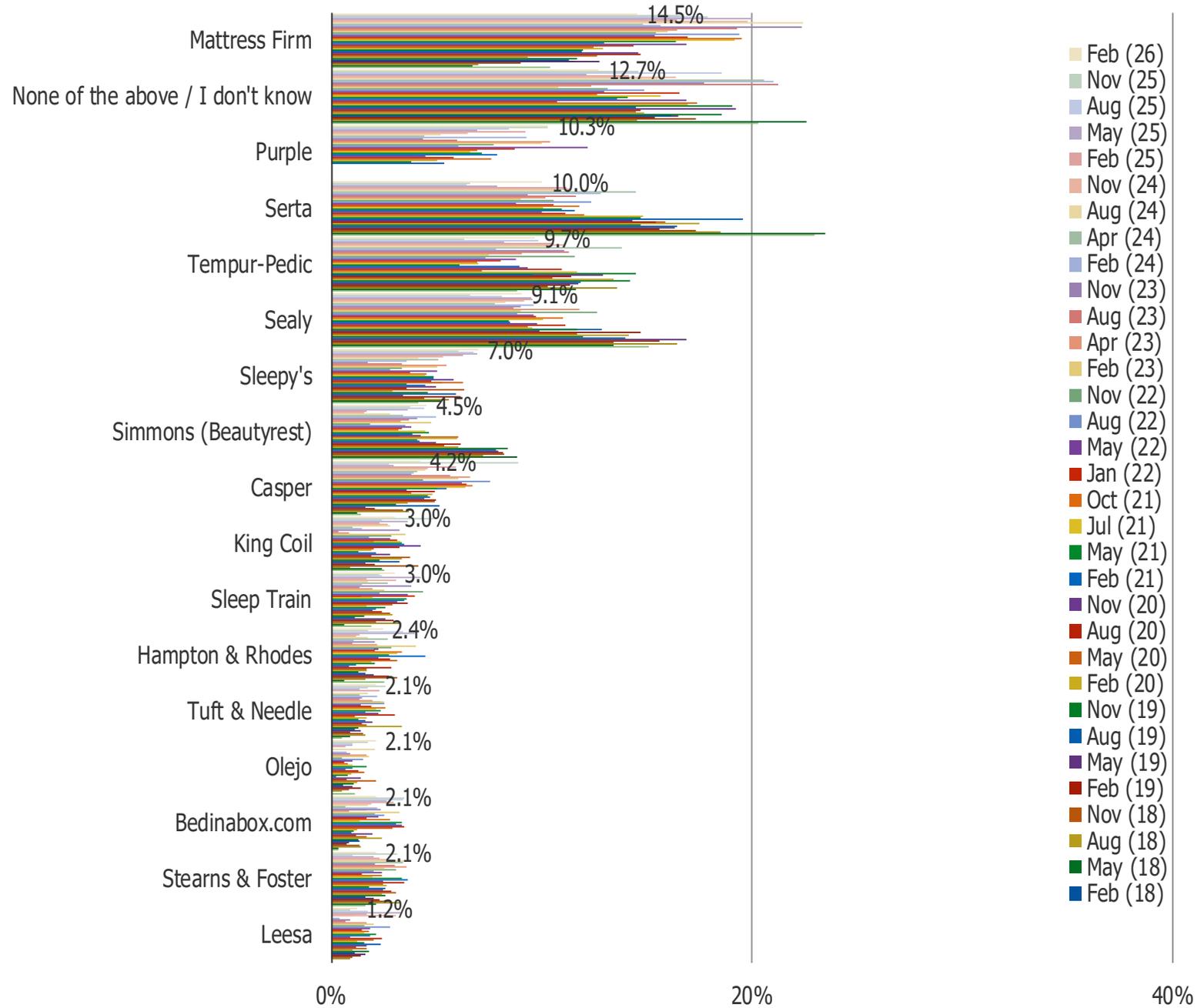
Posed to all respondents



COMPETITIVE DYNAMICS

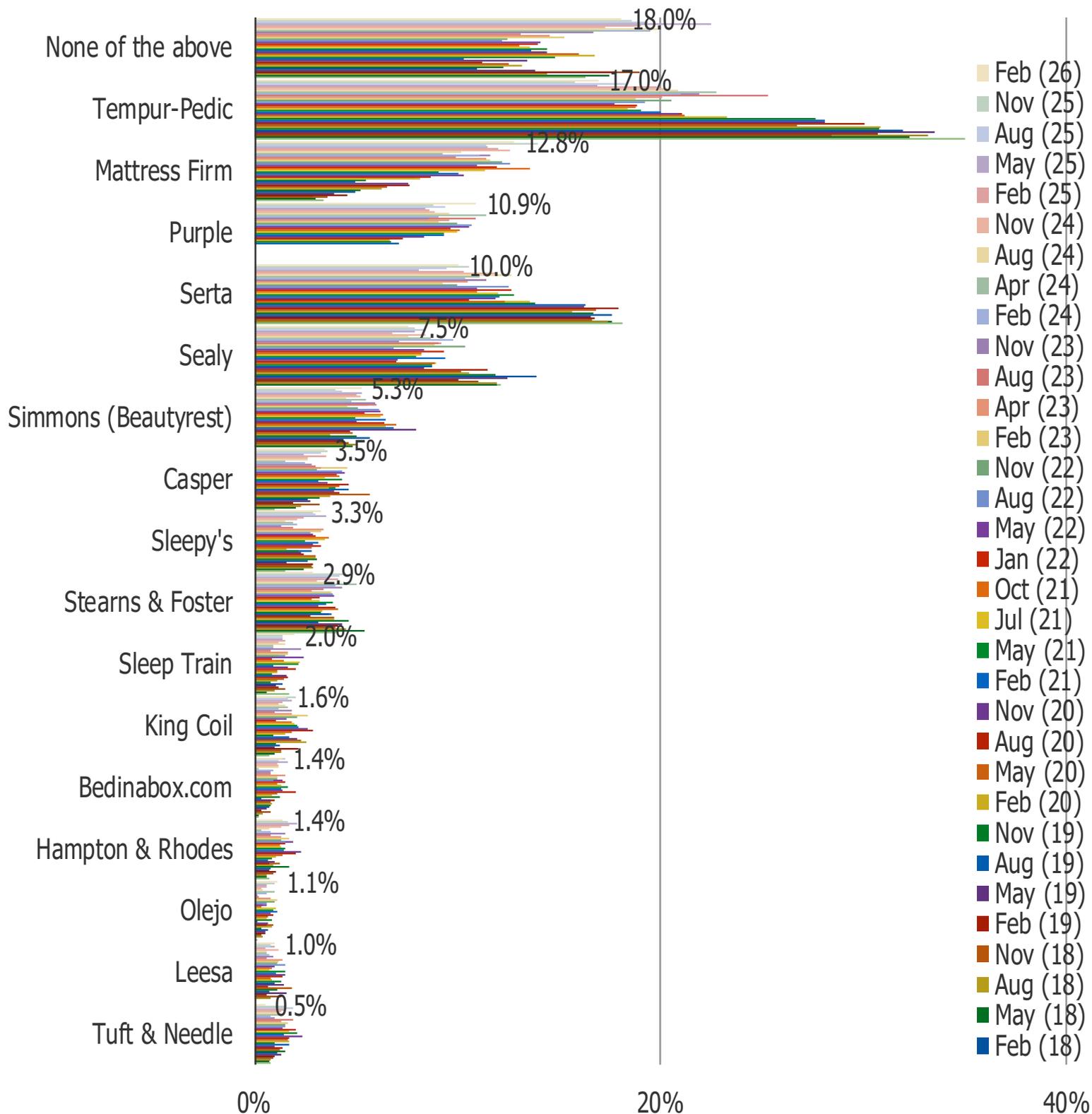
WHICH BRAND DID YOU PURCHASE?

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



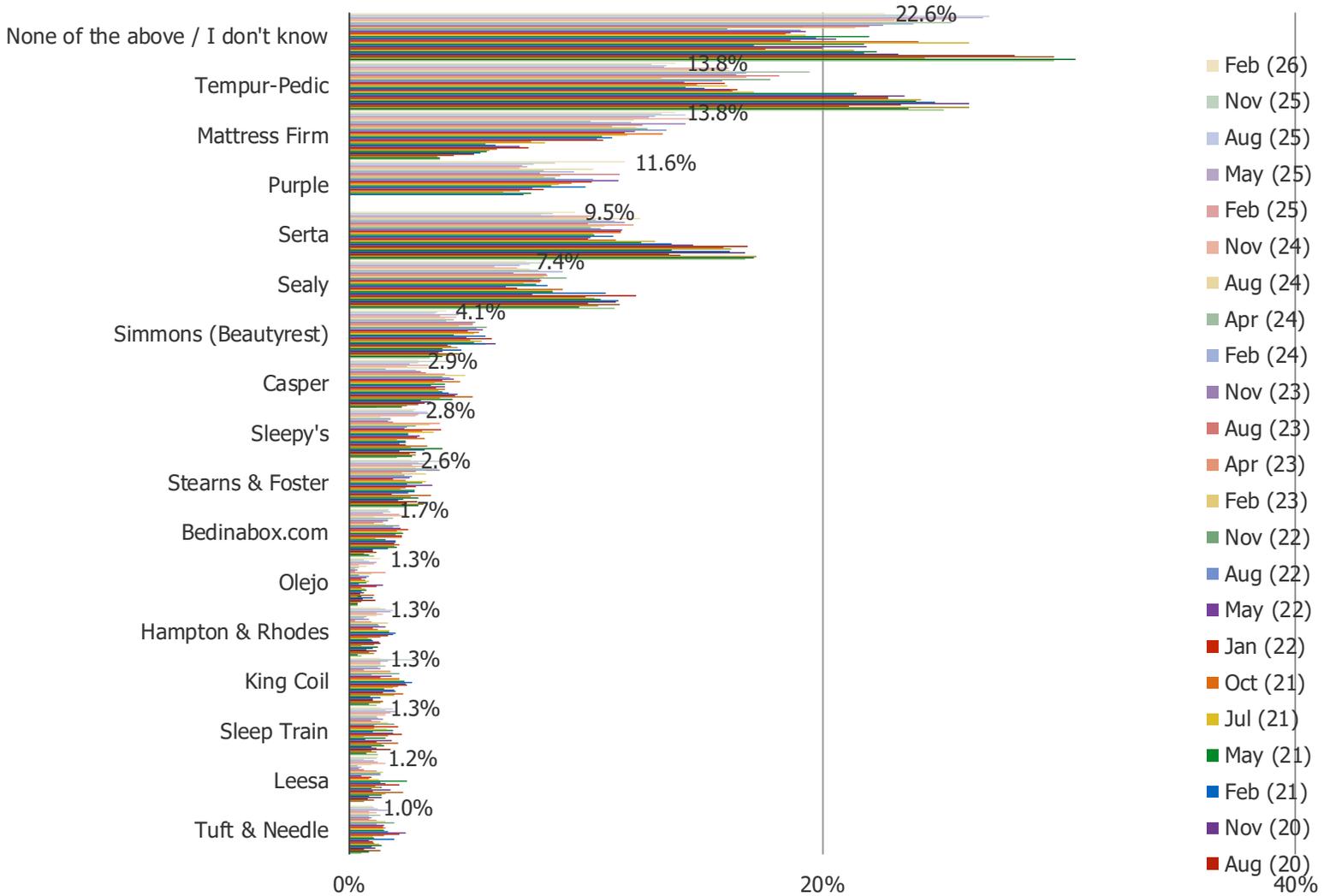
WHICH OF THE FOLLOWING MATTRESSES DO YOU THINK IS BEST?

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

