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"Some 13 million households bought furniture in the last twelve months and over half of these bought for the living room, while a similar number bought for bedrooms. They display a wide range of browsing and shopping habits, often gathering ideas online to shape their ideas and choices, then making store visits to judge quality, comfort and colours."

- Jane Westgarth, Senior Retail Analyst

This report looks at the following areas:

Even though journeys usually involve online browsing and purchasing, the role of the store remains an essential part of the experience for many categories of furniture, highlighting the importance for retailers to invest in their omni-channel shopping offer.

- Is online shopping making retail stores redundant?
- Are store chains resizing as a result of more shopping moving online?
- Retailers should act as personal curators, making it easier and faster to find what you want

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This report is part of a series of reports, produced to provide you with a more holistic view of this market



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Figure 17: Online share of sales of Furniture and furnishings, by value, 2017 (est)

#### How much spending is going online?

Store-based retailers are growing online sales

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# 1.3 million more households by 2022

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#### The housing market has plateaued

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#### Interest rate rises cool demand for consumer debt

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DFS broadens appeal with multi-branding strategy

# Retailers are committed to opening more stores

Retailers develop new shop formats

Omni-channel capabilities are widely available

Online links to an in-store assistant

The rise in social shopping

Visualising how things will look in the home

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IKEA is the largest furniture retailer in the UK

Growth of the category specialist

Many retailers are adding outlets

Online specialists grow

New breed of digital competitors emerging in the UK

## Launch Activity and Innovation

The Endless Aisle

Shopping close to home

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Fabb makes an in-store feature of design

In-store help with selection

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Figure 25: Bensons for Beds, Bed selection point of sale materials, 2017 In-store makeover at IKEA Wembley creates 'neighbourhoods' Figure 26: Example of IKEA roomset, 2017 DFS creates more in-store selling space Figure 27: DFS multi-branded site at Oxford, 2017 DFS encourages social interaction Figure 28: DFS, #MyDFS image, 2018 DFS creates moving images to inspire shoppers Help with visualising furniture in your own room IKEA store app bridges online and in-store experience Figure 29: IKEA Store app, 2018 John Lewis awards funding to digital start-up IdeaSpace embraces VR Made.com creates an in-store conversation for the online shopper Wayfair embraces digital innovation Comparisons sites create a different way to browse The Consumer – What You Need to Know 49% bought furniture in the last year Shoppers use a wide range of behaviours when choosing furniture Browsing online is ahead of in-store browsing 55% bought furniture online, 43% bought in-store Detailed information and clear online views are key for online purchasers Finding best deals influences 47% of in-store shoppers 63% say online browsing is essential when shopping for furniture In-store shopping remains a vital part of the journey for furniture **Furniture Purchased by Room** 49% bought furniture in the last year Figure 30: Furniture bought in the last twelve months, by room, December 2017 More than two thirds of under-35s bought furniture Figure 31: Furniture bought in the last twelve months, by age, December 2017 How important are private renters? Figure 32: Furniture bought in the last twelve months, by tenure, December 2017 The influence of house moves Figure 33: Furniture bought in the last twelve months, by length of time in current home, December 2017 34% bought furniture for just one room Figure 34: Furniture bought in the last twelve months, repertoire, December 2017 **Browsing for Furniture** Retailers' own websites are favoured over inspirational websites when gathering ideas VISIT: store.mintel.com **BUY THIS** CALL: EMEA +44 (0) 20 7606 4533 Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 **REPORT NOW** 

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Visiting shops is a key part of the selection process

Online visualisers used by 16% of 16-34s

Reaching out for advice and reassurance

28% looked at reviews online

Transition from helpline to sales force

Digital images are making the printed brochure redundant

Figure 35: Browsing for furniture, December 2017

Shoppers use a wide range of activities when browsing for furniture

Figure 36: Browsing for furniture, repertoire, December 2017

### **How Customers Browsed for Furniture**

45% of shoppers browsed in-store for their last furniture purchase

## Online shoppers of all ages favour computers for browsing

# Other ways of browsing online

Figure 37: How customers browsed for furniture, December 2017

# Under-35s more likely to use smartphone than tablets when browsing for furniture Figure 38: How customers browsed for furniture, December 2017

rigure 50. now customers browsed for furniture, becember 20

## 60% of shoppers just browsed using one channel

Figure 39: How customers browsed for furniture, repertoire, December 2017

#### **How Customers Bought Furniture**

#### More purchases made online than in-store

Figure 40: How customers bought furniture, December 2017

## **Factors Influencing Online Shopping for Furniture**

Detailed information and clear online views influence online shoppers Figure 41: Factors influencing online shopping for furniture, December 2017

# Wide repertoire of factors influences online shopping

Figure 42: Factors influencing online shopping for furniture, repertoire, December 2017

# **Factors Influencing In-store Shopping for Furniture**

#### Best deals sway 47% of in-store shoppers

## 29% mention inspiring room sets

Figure 43: Factors Influencing In-store Shopping for Furniture, December 2017

#### 45% of in-store shoppers mention more than one influential factor

Figure 44: Factors Influencing In-store Shopping for Furniture, repertoire, December 2017

#### **Attitudes Regarding Shopping for Furniture**

Subjective judgements are better made in-store

The personal touch matters

63% think that online browsing is essential

Clueing up for a store visit

Online shopping and returns

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Figure 45: Attitudes regarding shopping for furniture, December 2017

Preferences About In-store or Online Shopping for Furniture

Store visits preferred for judging comfort and quality

True colours

People prefer a store visit for measurements

In-store preferable for advice

Prefer online for browsing and paying

Enhance the impression of in-store choice Figure 46: Shopping preferences for furniture, December 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

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