

Living and Dining Room Furniture - UK - March 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Our research confirms that people who rent their homes from private landlords move regularly and are in the market to buy their own furniture. So there is huge potential to sell furniture that is easier to move. And fewer homes will have enough space to accommodate dining furniture or multiple sofas.”

– Jane Westgarth, Senior Retail Analyst

This report looks at the following areas:

- Are people dining and entertaining at home?
- What is the pattern of house moving?
- What is the impact of smaller homes?

In 2014 the market for living and dining room furniture enjoyed sales growth to almost £6,000 million. This was the second year running which saw sales growth and is very encouraging for an industry which has been through tough times since the recession. The uplift was helped by higher levels of consumer confidence and a more buoyant housing market. We expect 2015 to continue in buoyant mode with living and dining room furniture sales moving ahead by a further 3% or so. This slowdown in growth is linked to a predicted cooling of the housing market from the highs of 2014. Competition will be intense as large, high profile retailers use their advertising clout to gain market share.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Living and Dining Room Furniture - UK - March 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definitions

Financial definitions

Abbreviations

Executive Summary

The market

Figure 1: Consumer spending on living and dining furniture, 2009-19

Figure 2: Consumer spending on living and dining furniture, by category, 2010-14 (est)

Length of time in current home

Figure 3: Length of time in current home, December 2014

Companies, brands and innovation

Figure 4: Living and dining furniture, market shares by major retailers, 2014 (est)

The consumer

Figure 5: Living and dining furniture purchased in the last three years, December 2014

Figure 6: Spend on sofas and chairs in the last three years, December 2014

Figure 7: Spend on dining tables and chairs in the last three years, December 2014

Figure 8: Factors important for the next purchase of a sofa or easy chair, December 2014

Figure 9: Has a dining table and/or dining chairs at home, December 2014

Figure 10: Factors important for the next purchase of a dining table, December 2014

Figure 11: The main ways in which respondents and other members of the household and visitors (eg friends) use the living room/lounge area, December 2014

What we think

Issues and Insights

Are people dining and entertaining at home?

The facts

The implications

What is the pattern of house moving?

The facts

The implications

What is the impact of smaller homes?

The facts

The implications

Trend Application

Trend: Make it Mine

Trend: Minimise Me

Trend: Mind Mapped

Internal Market Environment

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Living and Dining Room Furniture - UK - March 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key points

Who has a dining area?

Figure 12: Rooms people have in their homes, December 2014

Figure 13: Kitchens and eating arrangements, June 2014

Entertaining at home

Figure 14: Different forms of entertaining at home, August 2014

Using media and watching TV

TV dinners

Broader Market Environment

Key points

Households by tenure

Figure 15: Current housing situation, December 2014

Figure 16: Current housing situation, by age, December 2014

Figure 17: Length of time in current home, December 2014

Figure 18: Length of time in current home, by tenure, December 2014

Multi-generation homes

Figure 19: Households, by composition, 2001 and 2011

Demographic changes

Market Size and Forecast

Key points

Forecast for consumer spending

Figure 20: Consumer spending on living and dining furniture, 2009-19

Figure 21: Consumer spending on living and dining furniture, 2010-14

Market segmentation

Figure 22: Consumer spending on living and dining furniture, by category, 2014 (est)

Figure 23: Consumer spending on living and dining furniture, by category, 2010-14

Strengths and Weaknesses

Strengths

Weaknesses

Competitive Context

Key points

Figure 24: Consumer spend on living and dining furniture in context, 2009-2014

Figure 25: Consumer spend on living and dining furniture as a percentage of spend on furniture, 2010-2014

Who's Innovating?

Key points

IKEA's furniture range with built-in chargers

Solar coffee table

Figure 26: The Current Table, February 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Living and Dining Room Furniture - UK - March 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Multi-purpose living room furniture
 Tongue-in-cheek advertising
 John Lewis embraces the virtual living room
 Oak Furniture Land expands into upholstery

Channels of Distribution

Key points

Market shares of living and dining furniture

Figure 27: Living and dining furniture, market shares, top 10, 2014 (est)

Category specialists

DFS buys up existing brands

General furniture retailers

Substantial non-specialists

Other retailers on the march

Shopping from home or on the move

Online furniture specialists

Figure 28: Online furniture specialists, 2015

Independents

Company Profiles

Corndell Furniture Co. Ltd

Figure 29: Corndell financial performance, 2011-12

JDP Furniture Group

Figure 30: JDP financial performance, 2013-14

Ekornes

Figure 31: Ekornes financial performance, 2012-13

Ercol

Figure 32: Ercol financial performance, 2012-13

Halo

Figure 33: Halo financial performance, 2013-14

Morris Furniture Group

Figure 34: H Morris & Co, financial performance, 2012-13

Sofa Brands International

Figure 35: Sofa Brands International, financial performance, 2012-13

La-Z-boy (Furnico)

Figure 36: Furnico, financial performance, 2013-14

Sherborne Upholstery

Figure 37: Sherborne Upholstery, financial performance, 2013-14

Westbridge Furniture Designs

Figure 38: Westbridge Furniture Designs, financial performance, 2012-13

BUY THIS
 REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Living and Dining Room Furniture - UK - March 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand Communication and Promotion

Key points

Advertising spend sees slight increase in 2014

Figure 39: Main media advertising expenditure on living/dining room furniture, 2010-14

October sees spike in advertising

Figure 40: Main media advertising expenditure on living/dining room furniture, by month, 2014

DFS dominates advertising spend

Figure 41: Main media advertising expenditure on living/dining room furniture, 2014

Figure 42: Main media advertising expenditure on living/dining room furniture, 2011-14

Television now the favoured media type

Figure 43: Main media advertising expenditure on living/dining room furniture, by media type, 2011-14

The Consumer – Living and Dining Furniture Purchases

Key points

Living and dining furniture purchases

Figure 44: Living and dining furniture purchased in the last three years, repertoire of types bought, December 2014

Purchases by length of time in current home

Figure 45: Living and dining furniture purchased in the last three years, by length of time in current home, December 2014

Figure 46: Living and dining furniture purchased in the last three years, all and sofas, by tenure, December 2014

Figure 47: Living and dining furniture purchased in the last three years, December 2014

Dining tables have family associations

Spend on sofas and chairs

Figure 48: Spend on sofas and chairs in the last three years, December 2014

Spend on dining tables and/or dining chairs

Figure 49: Spend on dining tables and chairs in the last three years, December 2014

The Consumer – Factors Important for the Next Purchase of a Sofa or Easy Chair

Key points

Factors important for the next purchase of a sofa or easy chair

Figure 50: Factors important for the next purchase of a sofa or easy chair, December 2014

The Consumer – Factors Important for the Next Purchase of a Dining Table

Key points

Who has dining rooms or dining areas?

Figure 51: Has a dining table and/or dining chairs at home, December 2014

Factors Important for the next purchase of a dining table

Figure 52: Factors important for the next purchase of a dining table, December 2014

The Consumer – How They Use the Living Room

Key points

How they use the living room

Figure 53: The main ways in which respondents and other members of the household and visitors (eg friends) use the living room/lounge area, December 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Living and Dining Room Furniture - UK - March 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Television as a key focus

Relaxing in the living room

Sitting together while occupied with separate things

Eating in the living room

How use of the living room varies by age

Figure 54: Top four selected ways in which respondents and other members of the household and visitors (eg friends) use the living room/lounge area, December 2014

Figure 55: Other selected ways in which respondents and other members of the household and visitors (eg friends) use the living room/lounge area, December 2014

Using the room as a play space

Working in the living room

The Consumer – CHAID Analysis

Methodology

How they use the lounge

Figure 56: Living and Dining Room Furniture – CHAID – Tree output, December 2014

Figure 57: Living Room and Dining Room Furniture – CHAID – Table output, December 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com