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### Introduction

If furniture retail was ever a simple, straightforward business, those days are long gone. Today, galvanized and fragmented by the advent of online shopping, the sector is fiercely competitive, and every business, from the smallest independent shop to the biggest webstore, must take advantage of every tool at their disposal if they are to survive.

The good news is that there's still space in the industry for experimentation, invention, and the personal touch, and given the huge variation in approaches that prosper today, the sector could look very different in 50 years' time.

People will always need furniture, and they will always seek to make their homes more comfortable and attractive – but there remains a great many unknowns when it comes to their tastes, motivations, and prejudices around furniture shopping.

What are customers buying, and where? What drives and guides their shopping journey? What should retailers – both in-store and online – be doing better? And, crucially, how is consumer demand evolving? To help you find the answers to these questions we partnered with Furniture News for a representative survey of UK consumers in order to learn more about today's furniture buyers.

"Customers are now in control of when, where, and how they want to interact with a retailer. However, this behavioral shift can offer great opportunities for businesses that keep a pulse on customers' wants and needs. The main question is: What do customers want? We partnered with Furniture News to get that answer and understand the profile of the modern furniture shopper in order to help furniture businesses keep up with the latest trends."

Jostein Pedersen, VP Product - 3D Commerce, Chaos

We can never know for sure what the next challenge will look like, but we can better understand what shoppers want, and how they want to buy it.



### The challenge

Most traditional 'brick-and-mortar' furniture retailers have come to accept that they must embrace online selling to some degree, whether through building a simple website and social media presence, or bringing advanced technology in-store to catalyze sales. At the same time, many 'pure play' online retailers are coming to appreciate the benefits that come from having a physical shop presence alongside their e-commerce channels. The challenge facing such retailers is making sure they can deliver the best of both worlds, without sacrificing any existing strengths.

The good news is that consumers like to shop in many different ways. They may seek out the expertise of a local high street independent, or browse the big brands' offer on their local retail park. They may prefer to trawl charity shops and online marketplaces for a pre-loved bargain, or have Google point them in the direction of the website that best suits their needs.

The goal of this survey is to help you understand your customers better and identify their habits, preferences, and expectations. We hope these insights will enable you to set your own experiences against benchmarks with the ultimate goal of creating an engaging furniture shopping experience.

Beyond this, it's about making enough right decisions. They say the most dangerous phrase in business is, 'Why change it? We've always done it this way' – well, no more excuses. Based on the findings in this survey you'll be able to prioritize your future technology investments, allocate your marketing spend, and refine your offer.

Hopefully, some of these insights will give you the confidence to make (the right) changes in your business and cater to furniture shoppers' needs — today and tomorrow.









# What you'll find in this report

Furniture News commissioned market research consultancy Savanta to survey a sample of 1,000 UK adults from January 31 to February 2, 2024, covering a representative spread of age, gender, location, profession of chief earner and social grade.

It clarified that the term 'furniture' meant large items such as tables, beds, cabinets, sofas and mattresses, as well as smaller furnishings and interior products such as rugs, cushions and home accessories. For further survey demographics, see page 28.



What do today's furniture shoppers want? In an industry first, Furniture News, supported by leading 3D furniture product visualization platform Chaos Cylindo, presents a comprehensive report on how UK consumers shop for furniture – both in-store and online – and the changes they'd like to see.

In this report, we will attempt to answer the following questions, and more:



What kind of shopping experiences will younger generations be more receptive to?



Which technologies are more likely to prove beneficial, in-store and online?



How do men and women feel differently about furniture shopping?



Is there a future for brick-and-mortar stores or pureplay websites, and what kind of hybrid experience are shoppers looking for?



What approaches are persuading shoppers to buy – and putting them off?



Which product areas are set to see the highest demand, and at what prices?

### Key takeaways

Shoppers, like businesses, come in countless shapes and sizes, but there are patterns and trends to be found in their behavior, and the retailer who better understands these will be better placed to succeed than the one who does not.

In this report, you'll discover the research behind key furniture retail insights, including:

- **The furniture buyer's journey is omnichannel** Consumers enjoy furniture shopping through a mix of brick-and-mortar and online channels.
- Human assistance is a differentiator Shoppers appreciate the ability to touch and feel products, and the service they receive from well-trained staff.
- Online is all about having more options Consumers value the convenience of online shopping, and having more choices at their fingertips.
- Shoppers are used to online shopping Each generation is increasingly leaning towards online shopping or a hybrid journey that includes both store and website visits.
- Technology is the catalyst of engaging furniture shopping experiences
   Shoppers of every age want to see more innovative technology being employed in furniture retail, both online and in-store.

## How do consumers shop for furniture?

More than half (58%) of those surveyed were homeowners, and a quarter (25%) had paid off their mortgages. The vast majority of the remainder were people in rented accommodation (33%) or those living with parents/guardians (8%).

Out of the sample, 11% of the respondents had purchased furniture in the last month, 18% in the last three months, 19% in the last six months, 20% in the last year, 16% in the last two years, and 14% in the last five years. Of those sampled who had never bought any furniture (2%), nearly two-thirds (61%) said they planned to do so within the next year.

68% had purchased a piece of furniture in the last year.

### The reason behind the most recent furniture purchase



Moving home/new home' was the most significant factor for more than a quarter (27%) of 18-34-year-olds, and for 21% of those aged 25-34.

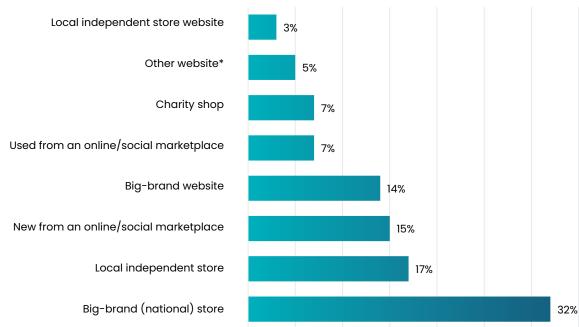


Nearly half (49%) of those aged 65+ cited 'replacing broken/outgrown furniture' as their principal reason.

### 44% of consumers concluded their shopping 'journey' with an online transaction, while 56% purchased from a physical store.

The survey defined 'furniture' as anything from big-ticket purchases to small accessories, so the price the respondents paid skewed towards the lower end: 62% paid less than £500; 13% paid £500-£999; 9% spent £1000-£1499; and 5% paid £1500-£1999. Only 10% spent more than £2000 (with just 2% spending more than £4000).

#### Source of most recent furniture purchase:





<sup>\*</sup> The respondents citing 'other website' as their source chiefly named those of major retailers/e-tailers

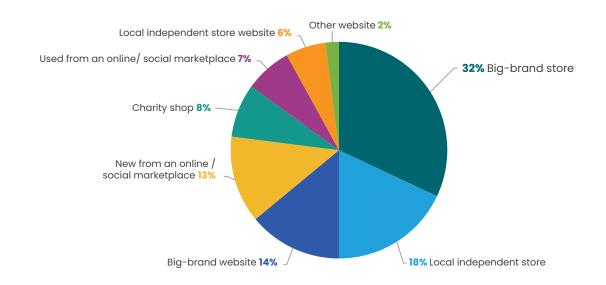
## Where are people planning to shop?

58% of consumers prefer buying furniture instore, compared to 42% who prefer online channels. Nearly two-thirds of men (61%) prefer to buy from a brick-and-mortar location, compared to 56% of women. Conversely, a greater proportion of women favor online transactions, with 45% opting for e-commerce channels in the first place, compared to 39% of men.

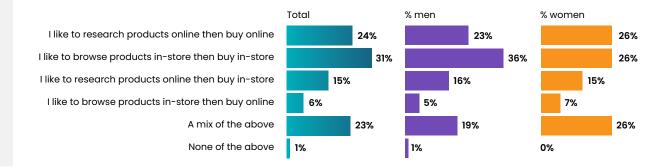
# More than two-thirds (68%) go online as part of the shopping process, with 30% preferring to make the purchase digitally.

The preference for a purely online shopping journey is most prevalent among those aged 18-24 (35%) and least common – but still present – for those aged 65+ (13%).

### Where do people prefer to shop for furniture?



People like to shop both offline and online, often choosing to use a combination of both before deciding on their purchase:



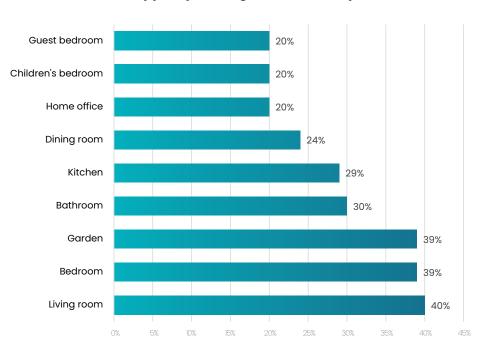
### A look into the future: Next furniture purchase

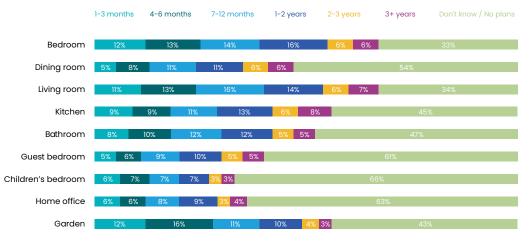
What parts of their homes are consumers planning to invest in next? Results show that the focus in the upcoming year will be on furnishing the living room (40%), bedroom (39%) and garden (39%), followed by the bathroom (30%), kitchen (29%), dining room (24%), children's bedroom (20%), guest bedroom (20%), and home office (20%).

Over the next three years, shoppers are prioritizing purchases for the bedroom (67%), living room (66%), garden (57%), and kitchen (56%).



### Which room are shoppers planning to furnish this year?





# What motivates furniture shoppers?

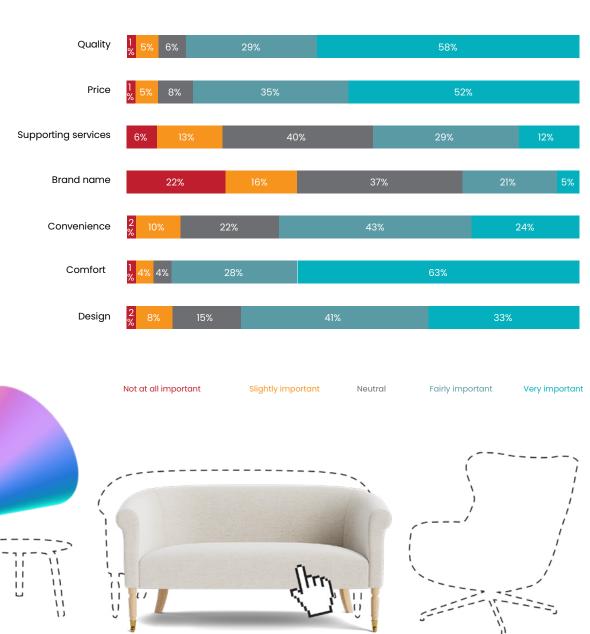
To dig deeper into consumers' motivations and beliefs, the survey revealed the most important qualities for furniture shoppers, including quality, price, supporting services, brand name, convenience, comfort, and design.

### Of greatest importance to shoppers was comfort (91%), followed by quality and price (both 87%).

Quality grows in importance for those aged 45-54 (89%), 55-64 (93%), and 65+ (94%).

Of the qualities surveyed, brand name was least important, at just 26%. Brand names resonate most strongly with those aged 35-44 (33%).

### What qualities are important to furniture shoppers?



# Furniture, trends, construction, and values

The survey asked respondents to say how much they agreed or disagreed with a range of statements to reveal their feelings around furniture, trends, construction, and their own values regarding matters such as sustainability and buying local.

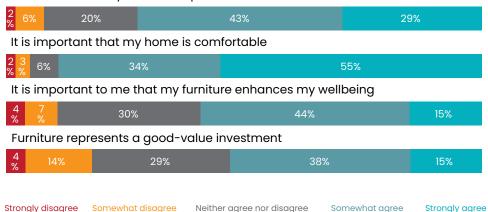
Consumers want a comfortable home, so it's no surprise that 72% of respondents say the furniture in their home is important to them.

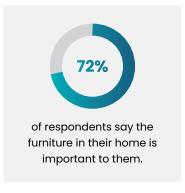
Consumers are looking for furniture that enhances their wellbeing and they perceive it as an investment.

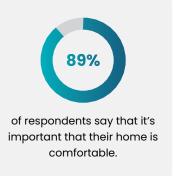
53% agree that furniture represents a good-value investment.

#### Furniture and the self

The furniture in my home is important to me











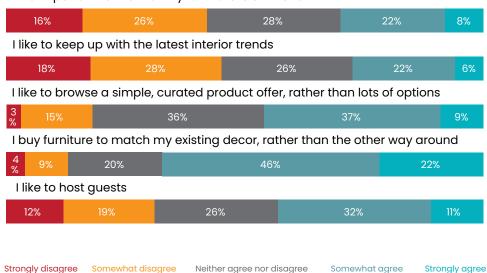
A significant portion of respondents expressed a penchant for hosting guests at home, indicating a growing interest in socializing and entertaining within personal spaces. This trend underscores the importance of investing in larger dining tables, sofas, guest accommodations, and outdoor furniture to accommodate such gatherings.

Additionally, a notable proportion of both men and women express an interest in staying abreast of interior design trends, particularly among younger demographics. However, this desire wanes with age, suggesting a shift in priorities towards more timeless or personal styles as individuals mature. Younger generations also exhibit a **preference for diverse** product offerings, indicating a desire for choice and customization in their interior design selections.



#### **Talking trends**

It is important to me that my furniture is on-trend





Nearly half (43%) of those surveyed expressed a fondness for hosting guests at home an important finding for those stocking larger dining tables and sofas, guest beds, bars and outdoor furniture.

Somewhat agree

Strongly agree



A quarter of men (25%) say they like to keep up with the latest interior trends, and 31% of women.



The desire to keep up with the latest interior trends decreases with age, peaking at 25-34 (45%) and falling to 14% for those aged 65+.



Younger generations also want a greater choice of products and options, with a quarter (25%) disagreeing with the statement 'I like to browse a simple, curated product offer, rather than lots of options', compared to just 14% of those aged 65+.

A prevailing sentiment among respondents is the emphasis on sustainable furniture, with more than half expressing the importance of ecofriendly manufacturing practices. This inclination is evident across various age groups, though slightly more pronounced among younger individuals, particularly those aged 25-34.

Interestingly, the significance of "Made in Britain" resonates most strongly with the older demographic, indicating a generational variance in consumer priorities.

Additionally, there is a widespread consensus on the value of durability, with an overwhelming majority across all age groups emphasizing the importance of furniture being 'built to last,' suggesting a universal preference for long-lasting and resilient products.

10 years warranty



#### **Values**

It is important to me that my furniture is made in Britain



Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree



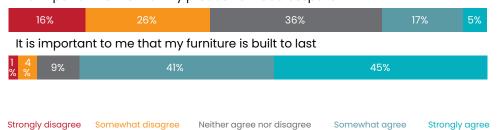
More than half (55%) of people say it is important to them that their furniture is made sustainably. This preference is expressed across the board, and only weighted somewhat towards the younger generations, resonating most with those aged 25-34 (60% agree) and least with those aged 45-54 (50% agree).



'Made in Britain' is most important with those aged 65+, with 48% agreeing that it was an important characteristic. Only 25% of those aged 18-24 agree.

#### Construction

It is important to me that my product is made bespoke





A total of 86% of respondents agree that being 'built to last' is an important characteristic. This number is even higher for those aged 45-54 (88%), 55-64 (91%), and 65+ (92%).

## Are consumers ready to pay more?

While consumers may express a tendency towards certain values, such as sustainability or bespoke construction, are they willing to pay more for furniture with these qualities? If so, how much more?

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Whereas those aged 65+ are willing to pay +11% more for furniture that is sustainably made, those aged 25-34 say they will pay +21% more.

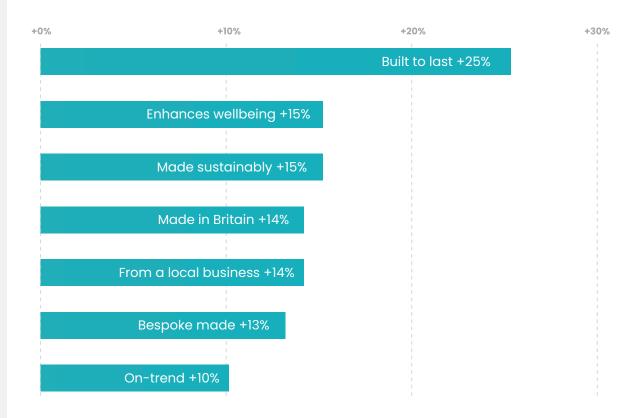
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Women are willing to pay +27% more for furniture that is built to last – men, only +23%.

**ॐ** 

Respondents aged 25-34 are willing to pay +23% more for furniture that enhances their wellbeing.

### How much more will people pay based on their values?



## How do shoppers discover new furniture?



60% say they find new furniture on the shop floor (and 71% of those aged 65+).



While only 5% of those aged 65+ discover new furniture through social media content, this proportion rises to 43% of 25-34-year-olds. However, the betterestablished online advertising channels, such as search engines and social media, are beginning to lose favor among the youngest consumers.



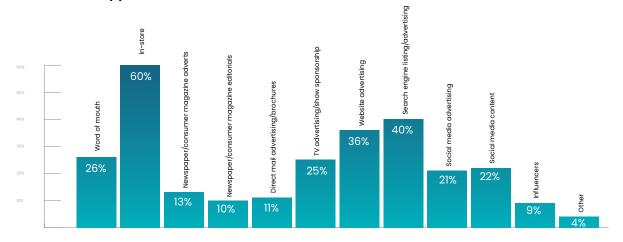
The biggest discrepancy in use between men and women also occurs for social media content – 18% compared to 26%.



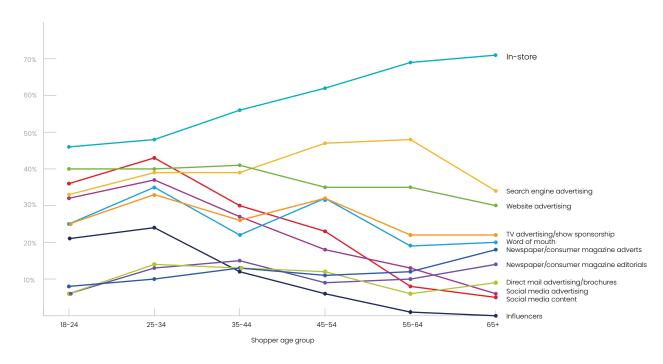
The number of shoppers citing 'influencers' decreases with age, dropping sharply after the 25-34 age bracket (24%).



### Where do shoppers discover new furniture?



### How different age groups discover new furniture



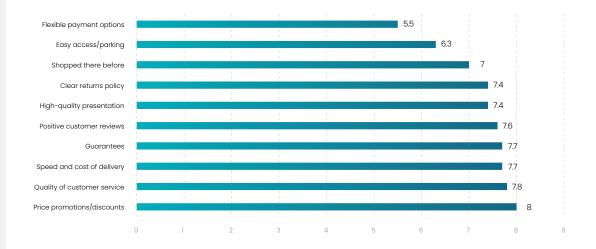
# Why do shoppers choose to buy furniture in-store?

Why do shoppers choose to purchase in a store rather than online? Those surveyed responded: the ability to touch and feel products (76%); expert, in-person advice from sales/support staff (39%); peace of mind, in case of possible returns/issues (32%); that they weren't confident in making the right selection online (27%); that they wanted to support local business (26%); that they disliked or were uncomfortable shopping online (8%); and none of the above (5%).

Nearly all (90%) of those aged 65+ said 'the ability to touch and feel products' was important to them, compared to just 55% of 18-24-year-olds.

## To what extent do the characteristics of the brick-and-mortar shopping experience influence people's decision to buy furniture in-store?

Ranking each on a scale of 1-10 (10 being the highest)

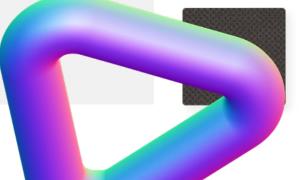




What shoppers perceive as being the chief strengths of physical retail is a close-run thing, but there are some discrepancies in how men and women feel about the subject – men only ranked positive customer reviews a 7.2/10, whereas women ranked them 7.9/10.

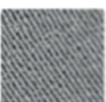


Although flexible payment options ranked as the least important factor, they were significant for those aged 25-34 (ranked 7/10) and the age groups 18-24 (6.7/10), and 35-44 (6.6/10).











# How can technology transform the in-store experience?

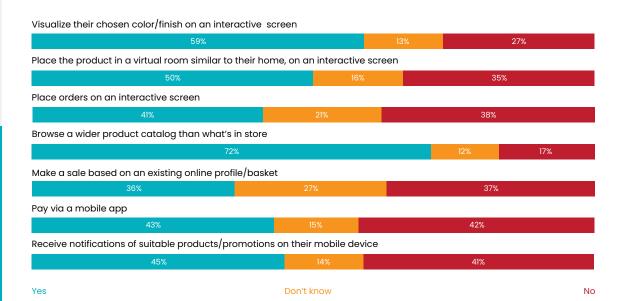
New technology offers brick-and-mortar retailers with new ways to meet demand.

"As the digital and in-store experiences blur, retailers will have to use digital technology to extend their storefronts. Whether that's through adopting endless aisle technology, installing digital kiosks, or equipping their sales team with tablets so they can help customers configure the product they want to buy, using the power of digital technology in-store will be crucial moving forward."

Jostein Pedersen
VP product - 3D commerce, Chaos

#### What do shoppers want to be able to do in-store?

Ranking each on a scale of 1-10 (10 being the highest)





72% of respondents would like the ability to browse a wider product catalog than what's in-store.



At least two-thirds of those younger than 55 said they would like to visualize their chosen color/finish on an interactive screen.



The desire to pay through a mobile app is most marked among 18-24-year-olds (71%).

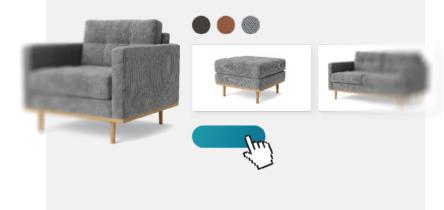


# Why do shoppers choose to buy furniture online?

The devices people favor when shopping online are: a mobile/smartphone (46%); laptop (25%); tablet (14%); desktop computer (13%); and smartwatch (1%).

The mobile/smartphone is the online shopping platform of choice for every age group apart from those aged 65+, two-fifths (39%) of which said they preferred to use a laptop.

Given that 4% of 18-24-year-olds responded 'smartwatch', it is clear that having a responsive online presence that is fit for emerging devices is increasingly important.



## Which features of online shopping are most likely to influence people's choice to buy from the internet, rather than in a physical store?

Respondents were asked to mark all that applied





Having the ability to compare products and prices with other sellers is a factor for nearly half (47%) of those aged 18-24.



Across all age groups, having the ability to compare products and prices is more important to women (44%) than men (36%).



44% of women choose online shopping because they want more choice than what's available in stores, compared to 35% of men.

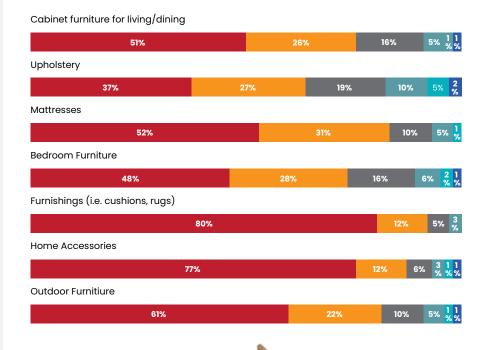


# What types of furniture are shoppers comfortable buying online?

With the emergence of the bed-in-a-box and modular upholstery, the industry has seen consumers embrace types of furniture online that the industry might never have thought possible a decade ago, with intensive marketing, generous returns policies, and compact packaging going some way to make up for shoppers' need to 'touch and feel' products in person.

Shoppers are more willing to buy upholstery at higher price levels than any other type of furniture, followed by bedroom and dining furniture. The dropoff in willingness to buy mattresses at higher price levels online is pronounced.

### How much are shoppers willing to pay for furniture online?



Up to £500

£500 - £999

£1000 - £1499

£1500 - £1999 £2000 - £2499

£2500+

# What features make shoppers more likely to buy furniture online?

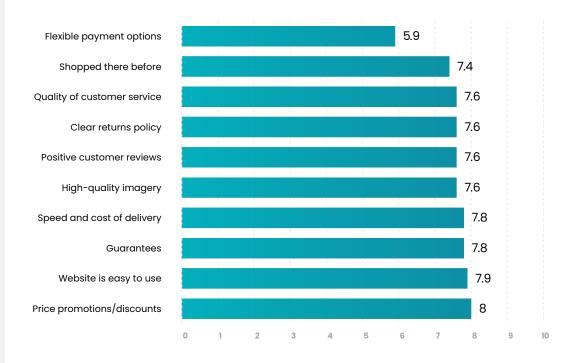
When considering purchasing furniture online, shoppers are heavily influenced by various factors within the digital shopping experience. Price promotions and discounts emerge as the most compelling incentive, followed closely by an easy-to-navigate website and reliable guarantees.

The speed and affordability of delivery, alongside high-quality imagery and positive customer reviews, also significantly impact purchasing decisions. Notably, younger adults aged 25-34 are particularly incentivized by these factors, indicating a generational trend in online shopping preferences.



### What features of the digital shopping experience make shoppers more likely to buy furniture online?

Ranked on a scale of 1-10 (10 being the highest)





Those aged 25–34 are particularly incentivized by these factors.



Website ease of use is more important to women (8.1/10), compared to men (7.6/10).



High-quality imagery is especially important to those aged 25-34 (8.2/10), 35-44 (7.9/10), and 45-54 (7.8/10).

# High-quality imagery is the backbone of online furniture shopping

Results from the survey confirm that highquality imagery is important to consumers when shopping for furniture online.

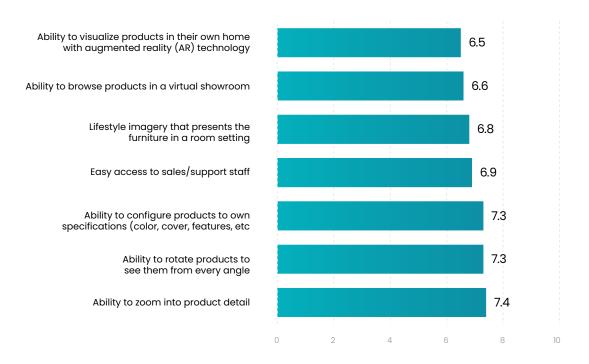
More than a quarter (26%) said that better, more interactive product visuals would encourage them to spend; 16% said they would be encouraged to spend more; and 19% said they would be encouraged to make a repeat purchase.

Nearly a third (30%) of those aged 25-34 said better visuals would prompt them to spend more than they might have otherwise.



### What is the appetite for more engaging online shopping experiences, supported by new technologies and functions?

Ranked on a scale of demand from 1-10 (10 being the highest)





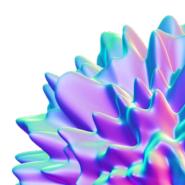
The ability to rotate products to see them from every angle is especially important to consumers aged 25-34 (7.9/10) and 34-44 (7.7/10).



Consumers younger than 55 rate lifestyle imagery higher than 7.0/10 and this number goes up to 7.5/10 for consumers aged 25-34.



Visualizing furniture with AR technology is especially interesting for consumers aged 25-34 (7.2/10) and 35-44 (7.0/10).



"In the world of commerce, the mantra 'show more to sell more' holds true. 3D visualization tools are rapidly becoming the industry standard, a status we'll likely see cemented in 2024 and beyond. By adopting 3D product visualization technology, furniture companies aren't just keeping up with the times – they are actively redefining the future of furniture e-commerce, making their business more agile, customer-centric, and economically efficient."

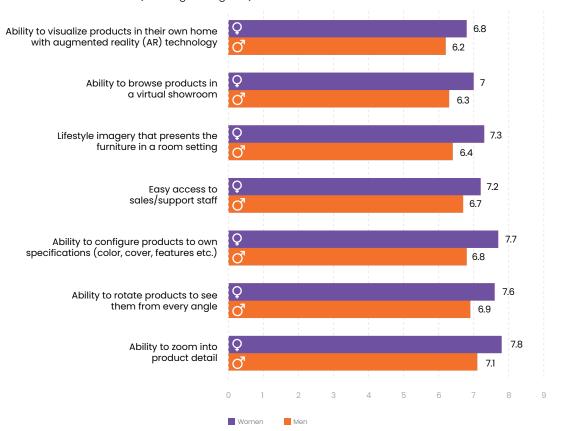
#### **Jostein Pedersen**

VP product - 3D commerce, Chaos



### How online features drive men and women's appetite to buy online

Ranked on a scale of 1-10 (10 being the highest)





Zoom functionality, and the ability to rotate and configure images, are the clear winners – and there is a marked difference in how receptive men and women are to these features.



On average, men said these features would make them 6.6/10 more likely to buy, and women 7.3/10.



The appetite for augmented reality (AR) technology and the ability to visualize items of furniture in one's own home using a tablet or smartphone – clearly exists and it's more prevalent for women (6.8/10) compared to men (6.2/10).

# What are consumers' biggest online furniture shopping frustrations?

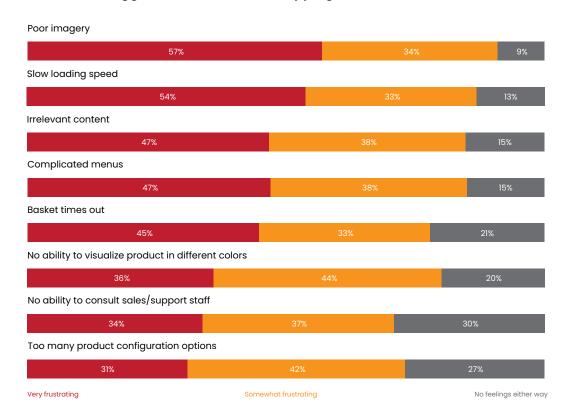
There are several weaknesses that shoppers often experience while shopping online, which can make them less likely to choose, or transact via, a digital channel – but which do they find the most frustrating?

Poor imagery, having no ability to visualize products in different colors, low loading speed, irrelevant content, and complicated menus are just some of the challenges consumers are facing when shopping for furniture online.

Most (91%) people said encountering 'poor imagery' frustrated them, and this frustration was most pronounced among 18-24-year-olds (96%).



### Consumers' biggest online furniture shopping frustrations





Poor imagery is frustrating to 93% of women and 90% of men.



Having no ability to visualize products in different colors when shopping for furniture online frustrates four in five people (80%) to some degree. This is especially the case for those aged 45-54 (87%).



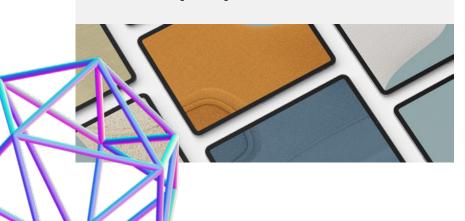
When asked how many color variations they would like to have available when making a selection, the respondents returned an average of 6.4.

# Comparing the in-store and online furniture shopping experiences

The survey found that nearly half (44%) of all shoppers take a multichannel approach to furniture shopping, visiting a combination of stores and websites to find the right items for their home.

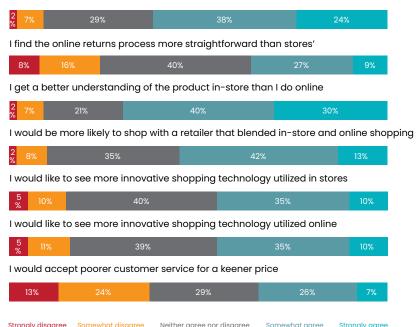
The ability to touch and feel a piece of furniture, see it in person, and the knowledge imparted by store staff and PoS resources, means 70% of people say they develop a better understanding of the product in-store than they do online.

The appetite for multichannel shopping is most marked in the 25-34 (63% in favor) and 35-44 (61%) brackets.



### How do furniture shoppers feel about each channel?

I receive better customer service in-store than online





Nearly half (45%) of those aged 65+ strongly agree that they get a better understanding of the product in-store than they do online.



Nearly half (45%) of shoppers would like to see more innovative technology utilized in stores, with more than half (52%) of those aged 18-24 in agreement, and 55% of those aged 35-44.



The appetite for more innovative shopping technology being available online is clearest in the 25-34 (56%) and 35-44 (55%) brackets.



More than half agree that they would be more likely to shop with a retailer that blended instore and online shopping – a multichannel, or 'omnichannel' shopping experience.

## What puts furniture customers off?

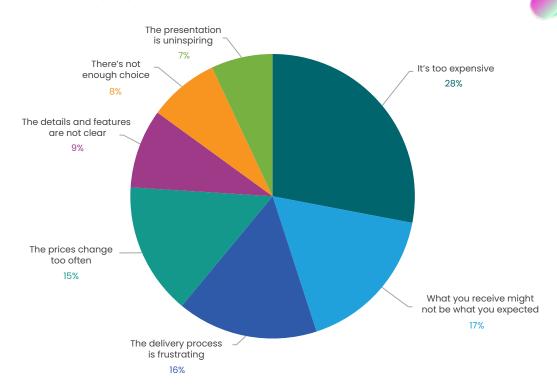
While high prices might be the biggest bugbear for more than a quarter (28%) of shoppers, there is also clear demand for greater clarity and transparency, of both product and prices, including an indication that fluctuating prices (which are commonplace in today's promotion heavy marketplace), can put shoppers off.

Another big frustration for 17% of consumers is the fear that what they receive might not be what they expected.

Regarding services that would make consumers more likely to buy furniture, the practicalities around delivery and disposal rank even higher in their estimation than matters of pricing and longevity.

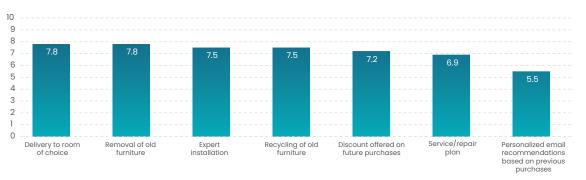


### What don't people like about the way furniture is sold?



### Which services/features would make consumers more likely to buy furniture?

Rank each by importance on a scale of 1-10 (10 being highest)



# The future of furniture shopping

"One thing is clear from this research – the appetite for emerging technologies is high. Customers expect an engaging furniture shopping experience from start to finish – whether online or in-store, regardless of the channel or device they are using. The adoption of technologies, such as 3D product visualization and Al-generated lifestyle content, will help furniture businesses redefine the buyer journey, setting up new standards, not just for the furniture industry but for business in general."

#### Jostein Pedersen

VP product - 3D commerce, Chaos



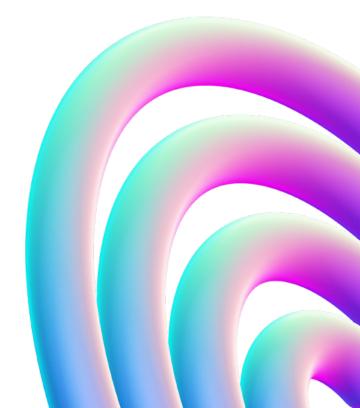
Where do people want to buy furniture? Although those in search of new products tend to favor physical stores, the results show a fairly even split between brick-and-mortar and online channels.

Shoppers appreciate the ability to touch and feel furniture in-store (unsurprising when comfort is the most important factor to them), and the service they receive from well-trained sales staff.

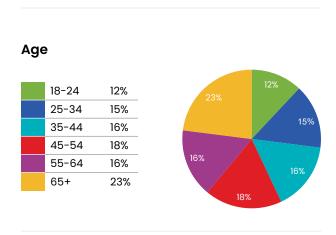
But they also value the convenience of online shopping, and having more choice at their fingertips – despite being frustrated by poor imagery and slow loading speeds. The results of the survey show that each generation is increasingly leaning towards online shopping, or a hybrid journey that includes both store and website visits.

That said, shoppers of every age want to see more innovative technology being employed in furniture retail, both online and in-store. They want interactive screens through which to browse more products and variations on the shop floor, and to be able to zoom into, rotate, and configure furniture online – all of which help to mitigate the limitations of each channel, expanding the offer's selection and clarity.

As more shoppers go 'multichannel,' they want to enjoy the best of both worlds in every interaction – and to see the back of any common flaws. Retail is changing, and it pays to explore each and every possibility to evolve alongside consumer demand, and better address shoppers' needs.

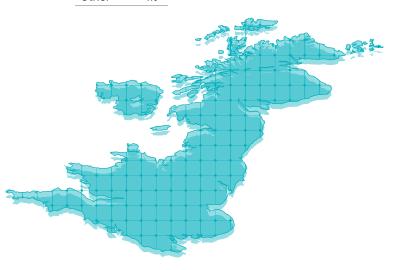


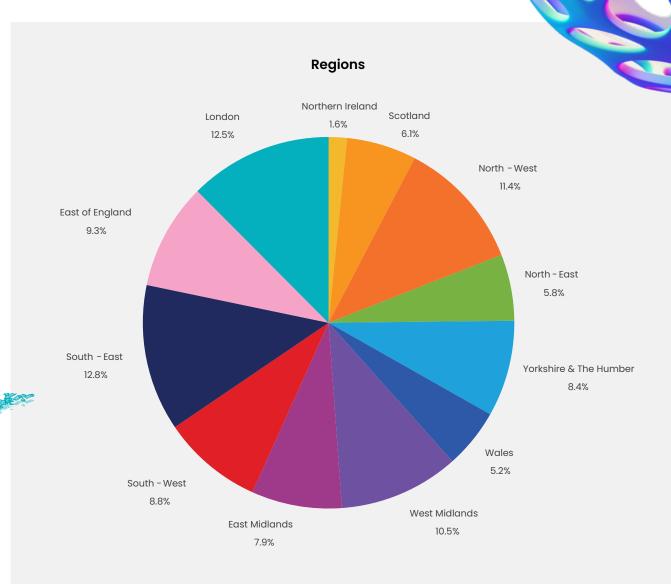
### **Survey demographics**



#### Gender

Male	49%
Female	50%
Other	<1%







### **About Chaos Cylindo**

A world leader in 3D visualization technology, Chaos is defining visualization by offering accessible tools, simplifying and accelerating workflows, and empowering visual storytelling for artists, architects, designers, and other creative professionals.

As a product of the Chaos portfolio, Cylindo is a 3D product visualization platform designed to support visual commerce. Hundreds of furniture companies partner with Chaos Cylindo to get superior product visuals across the entire furniture buyer journey. The platform goes beyond high-quality product visualization and gives furniture businesses versatile assets they can leverage across multiple touchpoints.

Cylindo is the catalyst that drives delightful shopping experiences, helping retailers and brands show more and sell more. Using the Cylindo Platform, companies have increased conversion rates by over 36% and average order value by 88% while reducing visualization costs by 58% on average.

For more information, visit chaos.com and chaos-cylindo.com.

Book a demo

