CANADIAN HOUSEHOLD FURNITURE RETAILING

A Survey of Recent Trends
in Style and Merchandising
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CANADIAN HOUSEHOLD FURNITURE RETAILING

RECENT TRENDS IN STYLE AND MERCHANDISING

Introduction

The lack of adequate information concerning the Canadian market for furniture has long been one of the major sales problems for this country's retailers and manufacturers alike. By contrast, a great deal of data about sales conditions and trends in the United States is routinely available in the various trade journals serving the industry in North America.

Because of this the Department of Industry, Trade and Commerce decided to sponsor a survey of Canadian retailers, both to obtain adequate information for the current period, which would at the same time be comparable with that published United States data, and to evaluate a method which might be utilized by the furniture industry itself in continuing to gather such information on a regular basis in the future. The aim of the survey was to examine recent trends and the current position regarding areas such as style, finish and price preferences, the response to design co-ordinated lines, the extent of franchising and its effect, the impact of imported furniture and similar matters. No forecast of style trends was made.

The Canadian Council of Furniture Manufacturers has co-operated with the Department in arranging both this retail survey and a comparable one of manufacturers. The value of this first attempt to analyze the Canadian retail market for furniture has depended on the degree of response of the dealers themselves—actually an almost unprecedented 96 per cent of those selected for interview replied—and on the accuracy of the replies given.

Survey Technique

It was decided that, at least for the first examination of the Canadian market, personal interviews would be more fruitful than the use of mailed questionnaires. An approximate total sample size was determined which would be adequate for breakdown by region and type of store as well as providing good overall Canadian representation. It was determined that a sample of 155-160 dealers would give very good coverage; recent American surveys, for a market fourteen times as large, and fully as diverse regionally, have been based on samples of 80–100 dealers. The total figure for the Canadian sample was broken down by regions approximately according to population; to minimize the possibility of bias, dealers were then selected on a random basis. Of the total 157 dealers selected, 150 granted interviews; their distribution is given in the following table.

	Total	Newfoundland	Maritimes	Quebec	Ontario	Prairies	B. C.
Dealers Selected	157	6	16	39	58	27	11
Dealers Replying	150	6	14	37	56	27	10

It was considered preferable to have the interviewing carried out by an organization experienced in this work rather than by Departmental personnel. A Canadian firm, International Surveys Limited, was retained for this purpose.

The questionnaire used for the interviews was designed to provide information comparable with that in surveys covering the United States market as well as items of specific interest to the Canadian industry. It was constructed in such a way that dealers were not asked to reveal actual sales figures or other confidential information. The period under review was 1968 and, for three-year trends, 1966-1968 inclusive. The contents were so planned that dealers would be asked to give no more than half an hour of their time to the interview. A copy of the questionnaire appears as Appendix I.

Interviews were held during the last two weeks in January, 1969. Following this, International Surveys Limited tabulated the data, delivering the report of some 400 pages to the Department and retaining the actual interview sheets in order to preserve confidentiality.

The tabulated data were analysed and the published report prepared within the Department.

I SUMMARY

The summary of findings set forth below relates to the figures for all Canada. These averages and the regional differences from them are discussed in detail in parts II to VI of the report.

The only style terms used in the report which may require clarification are "Contemporary" which refers to furniture of good, clean, well executed modern design, not obviously derived from traditional patterns and "Commercial Modern" which refers to lower quality furniture, of nondescript design and style, generally produced for the low-price market.

A Three Year Style Trend

The examination of the trend of sales for each style of case goods and upholstered furniture over the past three years revealed that Spanish had the best overall rate of increase, with Colonial second for both Case Goods and Upholstered. Third position for Case Goods was held by Commercial Modern and fourth by Contemporary. For Upholstered the order was reversed – Contemporary third and Commercial Modern Fourth.

B Best Selling Style

The picture is somewhat different with regard to the styles which are considered by dealers to be the best selling at present. For bedroom and dining room furniture Spanish, which had been at the top in the three year sales trend, had the greatest percentage of retailers placing it in first, second or third spot – 78 and 61 per cent respectively. But for occasional case goods and upholstered furniture Contemporary, which had a lower three-year rating, was reported to have the lead as the best selling style. For quick reference, the relative rating of all the styles and types of furniture is tabulated below; the styles are listed in descending order for bedroom furniture, as an additional guide.

BEST SELLING STYLE

(Percentage of Dealers Ranking in 1st, 2nd or 3rd Place)

	Bedroom	Dining Room	Occasional	Upholstered
Spanish	78	61	53	44
Contemporary	67	60	60	69
Colonial	52	49	42	52
Commercial Modern	44	35	42	38
Italian	25	19	28	19
French	24	46	43	44
English	2	2	4	2
None	6	14	18	21

C Fastest Growing Style

An attempt was made to determine if any other style might be replacing Spanish in popular favour, by asking dealers what style was growing fastest in sales. The startling find is that dealers claim overwhelmingly that no one style is growing faster than any other. Spanish still holds a good lead for bedroom furniture, Contemporary for upholstered.

FASTEST GROWING STYLE

(Leading Style Name and Percentage of Dealers Reporting It)

	Bedroom	Dining Room	Occasional	Upholstered
No One Style	65	79	87	62
Leading Specific Style	**Spanish**	**Spanish**	**Spanish**	**Contemporary**
	24	7	4	15

D Trend re Groupings of Furniture

Canadians still heavily favour standard suites of furniture, compared with assembling groupings to their own taste. The proportion of dealers indicating this for the different types of furniture is as follows:

Bedroom	85%
Dining Room	57%
Upholstered	81%

E Price Categories

For both bedroom and dining room furniture, half the retailers indicated that the highest dollar volume of sales comes from the medium priced lines. For upholstered furniture a more detailed analysis was made, based on individual styles. As an example, for Contemporary 61 per cent of dealers claimed the medium priced lines generated the bulk of their sales; for Spanish the figure was 69 per cent. The relative importance of these price groups is shown in the table below.

PRICE CATEGORY GENERATING HIGHEST DOLLAR VOLUME OF SALES

(Percentage of Dealers Indicating Each Category)

	Bedroom	Dining Room	Upholstered	
			Contemporary	Spanish
Low Price	38	24	36	10
Medium Price	51	48	61	69
High Price	11	28	3	21
Total	100	100	100	100

F Finishes

The finishes applied to case goods follow closely the traditionally accepted ones for the various styles reported on in the survey.

G Merchandising Trends

1. Retailers across Canada offer very full lines to their customers, both as to types of furniture and to styles. The only styles not carried almost universally are Italian (though carried by about 85 per cent of dealers), Commercial Modern by at least 75 per cent), and English (handled by only 48 per cent of dealers).
2. Dealers are almost exactly evenly split on the question as to whether or not there is a growing trend amongst customers towards assembling their own groups of furniture, by mixing styles, rather than purchasing matching sets.
3. At the same time, 70 per cent of the retailers claim that they find stocking a fully design co-ordinated line of the various kinds of furniture (bedroom, dining room, occasional and upholstered) gives a merchandising advantage.
4. Two-thirds of the dealers sell franchised lines and 80 per cent of these claim that it gives them a competitive advantage.
5. Imported furniture is sold by 40 per cent of Canadian dealers. Of these dealers more than half claim exclusivity to be the principal advantage from imports one quarter give price as the advantage. The proportion of their total sales represented by the imports arnges from one per cent for some dealers to over 50 per cent. One-fifth of the dealers handling imports indicate that they represent more than 10 per cent of total sales, slightly over two-fifths give 10 per cent of total sales as the proportion, the balance indicate that imports account for less than 10 per cent of their total. The United States is the major source of their import lines for over three-quarters of the dealers handling imported furniture; the North Carolina region is the principal supplier.

H Suppliers

The number of furniture suppliers with whom any one retailer deals may vary from less than 5 to over 100. Some 30 per cent of retailers confine themselves to 11–20 suppliers and another 25 per cent deal with 21–40. Department stores, as a group, tend to have many more sources of supply – 50 per cent of them dealing with more than 40 suppliers.

II TRENDS–CASE GOODS

A Three-Year Style Trend–All Case Goods (Table 1 – page 41)

Retailers were questioned as to the "sales trend" over the *past three years* for the different styles of case goods in general. For the *immediately past year* the information on "best selling" and "fastest growing" style was requested on a more detailed basis by actual type of furniture–bedroom, dining room and occasional.

(i) Canadian Average

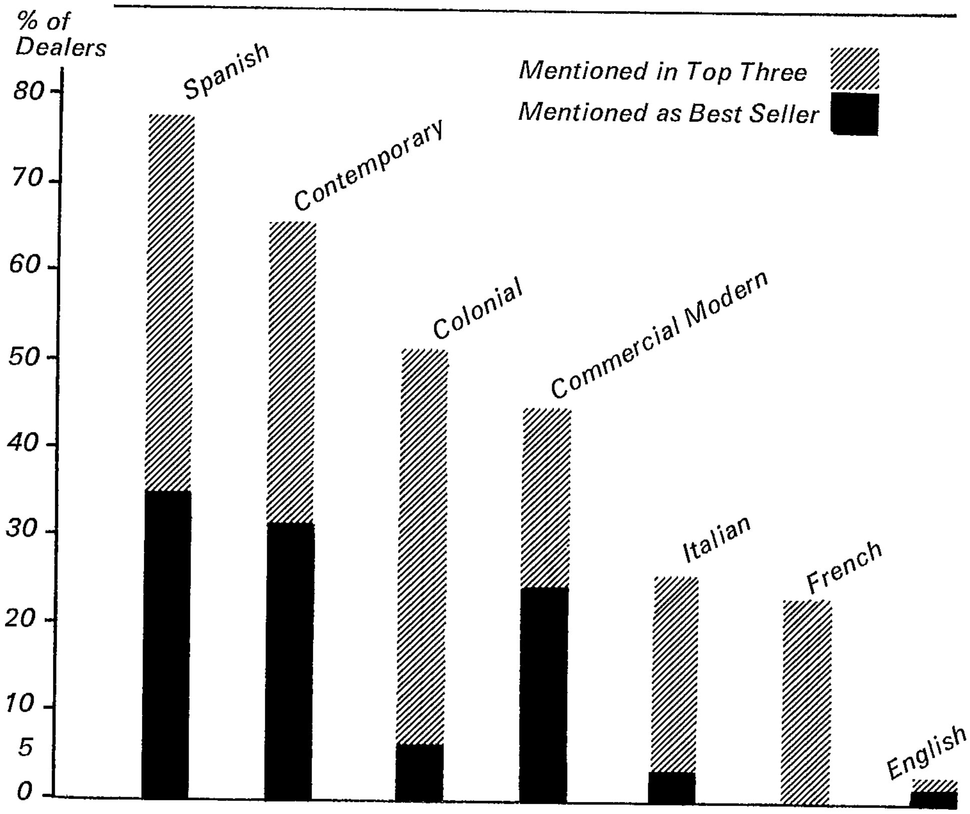
As might be expected, the style showing the strongest upward trend over the past three years was *Spanish*, with 77 per cent of the dealers throughout Canada claiming an increase in sales (almost a quarter of all dealers showed increases in excess of 25 per cent, 13 per cent indicating "no change" and only 10 per cent claiming an actual reduction in sales. In overall sales increase, *Colonial* was next, with half the dealers indicating an increase (mainly a moderate one), one-third "no change" and only one in six showing a reduced demand. Rather surprisingly, *Commercial Modern* showed a considerable overall increase, due to the fact that just over one-third of the dealers indicated increased sales of that style, 55 per cent indicated "no change" and barely 10 per cent a decline. *Contemporary* styling was weaker than might have been anticipated, with 38 per cent of the dealers showing an increase (mostly less than 10 per cent), one third reporting "no change" and 29 per cent claiming decreases (generally of greater magnitude than the reported increases); there was, on balance, only a very slight overall increase. The other three styles – *Italian, English* and *French* – all showed a trend over the past three years to decrease in popularity, though only to a limited degree. Of dealers carrying *Italian,* 33 per cent had increased sales (two-thirds being no more than 10 per cent), 39 per cent had "no change" and 28 per cent had decreases (though of greater average magnitude than the increases). Two-thirds of the dealers in *English* style case goods reported "no change", the balance were split between increases and decreases, the latter being of greater average magnitude. French style, the one showing the greatest decrease in popularity, had minor increases reported by 27 per cent of dealers, "no change" by 40 per cent and decreases (primarily in the five to 25 per cent range) by 33 per cent of the dealers.

(ii) Significant Differences from Canadian Average

Newfoundland was the only region in which Spanish did not lead the sales trend. There, possibly because of the effect of the relatively small sample, it ranked below both Contemporary and French. The strong increase in sales of Colonial was particularly marked in *Quebec* and *British Columbia;* Commercial Modern (perhaps reflecting income patterns) was very strong in the *Maritime Provinces* and the *Prairies.* In comparing the experience of furniture stores as such with department stores, the *department stores* showed a much greater increase in both ends of the spectrum – Contemporary and Commercial Modern – than did furniture stores. Canada's two *Metropolitan Communities (Montreal and Toronto)* reacted differently to other parts of their respective provinces and to each other. For example, though Spanish had a slightly stronger upward trend in Quebec than in Ontario, Montreal was less interested in it than was the rest of the province. In Ontario it was the metropolis that lead the trend to Spanish – and much more strongly than the other centres. In general Toronto reacted more favorably to all styles, with the exception of Colonial, than did the rest of Ontario; Montreal had a stronger favorable trend than the rest of Quebec for only three styles – Contemporary, Italian and Commercial Modern. Metropolitan Toronto showed a more favorable response than Montreal for all styles except Colonial and – unexpectedly – English.

B Bedroom Furniture

1. Best Selling Style—Past Year (Table 2 – page 31)



(i) Canadian Average

Bedroom Furniture sales for Canada as a whole during the past year (1968) showed Spanish style leading, with 34 per cent of the dealers giving it first place and 78 per cent listing it amongst their first three choices. *Contemporary* followed closely with 32 per cent allocating first place to it and 67 per cent listing it amongst the the top three. *Commercial Modern,* though holding top position with 23 per cent of the dealers had slightly less overall popularity than *Colonial.* That style lead in popularity with only a handful of stores but almost half of them rated it in the second or third spot. *French* and *Italian* styles showed some strength as second and third choices so that they appeared within the top three for 24 per cent of the dealers respectively. Almost no interest has been shown in *English* style bedroom furniture.

(ii) Significant Differences from Canadian Average

Newfoundland gave all the first mentions for best seller to Contemporary; Spanish received only third mention, and then by half the dealers. The *Maritime Provinces* reversed the national position and put Contemporary ahead of Spanish by a considerable margin. In *Quebec,* though Spanish was the top selling style, both Commercial Modern (with 19 per cent giving it first place, 62 per cent in the top three) and Colonial (11 per cent best seller, 59 per cent top three) outsold Contemporary. *Ontario* showed considerably more interest in Italian than the national average, as did the *Prairies.* The *Metropolitan Community of Montreal* followed the national picture fairly closely, except for some added emphasis on French style. *Metropolitan Toronto* downgraded Colonial, indicated considerable customer interest in Italian and French, bringing them to the same overall level as Commercial Modern.

2. Fastest Growing Style

(i) Canadian Average

As might be expected, sales of *Spanish* style bedroom furniture seem to be growing faster than any other. One quarter of the dealers said this, but – two-thirds of the 150 respondents claimed that no one style was growing faster than any others.

(ii) Significant Differences from Canadian Average

No regional or other grouping of dealers upset the national pattern completely. However, the strength of the surge to Spanish ranged from *Newfoundland's* 17 per cent (83 per cent claiming no fastest growing style) to *Quebec's* 36 per cent. In the *Metropolitan Communities of Montreal and Toronto,* although 28 per cent of the dealers showed Spanish and the fastest growing style, there was a healthy 12 per cent who claimed that Contemporary was growing faster than any other.

3. Trend re Groupings

(i) Canadian Average

Standard suites (bed or headboard, chest and dresser) still account for most sales of bedroom furniture according to 85 per cent of Canadian dealers. Open stock held the lead with 10 per cent and new groupings with five per cent.

(ii) Significant Differences from Canadian Average

The Canadian pattern held generally across the country, although *department stores* claimed greater importance for open stock – 19 per cent showed it in first place compared with 69 per cent for standard suites. This reflected particularly the experience of department stores in the *Maritime Provinces* and *Quebec* and to a lesser degree those in *British Columbia* and *Ontario.*

4. Price Categories

(i) Canadian Average

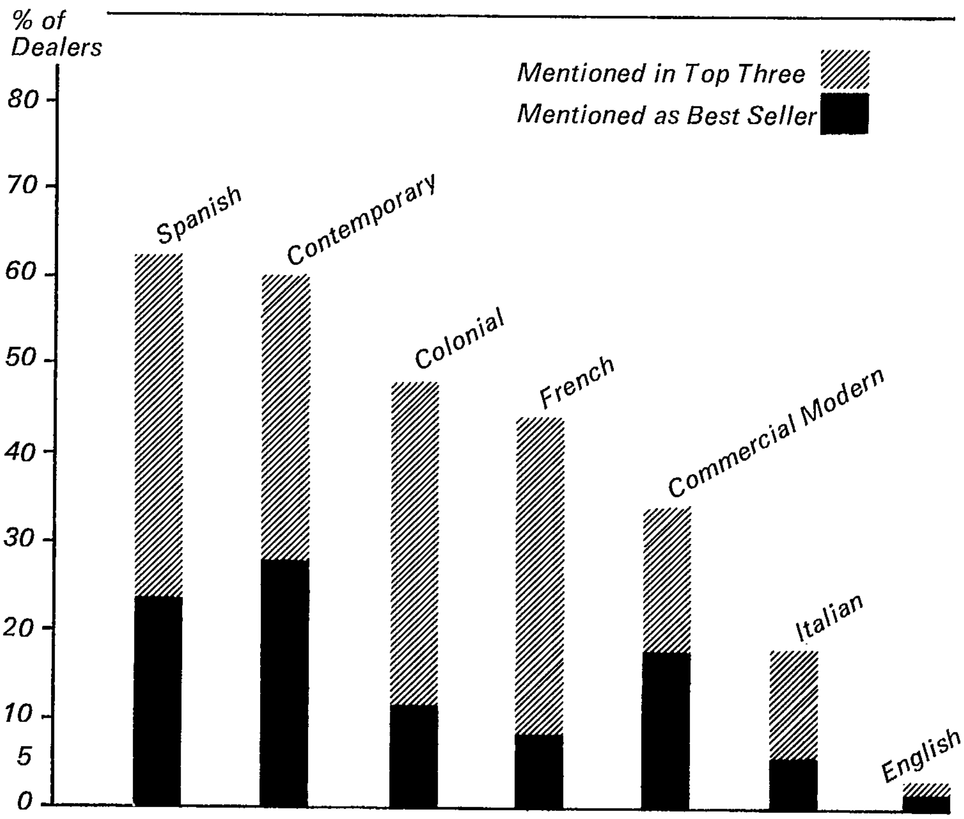
For 38 per cent of Canadian dealers the highest dollar volume of sales was provided by "under $300" suites. For 51 per cent of them the medium priced "$300 to $499" suites provided the bulk of the sales. For only 11 per cent were the high priced "$500 and Over" items the major bedroom furniture sellers.

(ii) Significant Differences from Canadian Average

There were wide variations from the national averages on sales by price categories. *Newfoundland* had by far the greatest proportion of dealers – 83 per cent – selling in the low price "under $300" category. (This would indicate that the best-selling "Contemporary" style mentioned earlier was more probably "Commercial Modern".) The *Maritime Provinces* were close to the national position, with only a slight increase in the "$300 to $499" grouping at the expense of the high-priced lines. In *Quebec* the emphasis on low-priced and medium-priced bedroom furniture was almost identical, each with 43 per cent of the dealers. *Ontario* and the *Prairies* were both very close to the average for Canada; the former having just slightly more dealers claiming that the "$500 and Over" category provided the highest dollar sales volume. *British Columbia* claimed a very small proportion of sales in the low-priced category – only 10 per cent of the dealers compared with the Canadian average of 38 per cent; the differences went to increase the proportion of medium-priced furniture. *Department Stores,* on average, claimed a slightly up-grading from the medium to the high-priced category (15 per cent compared with the overall Canadian average of 11 per cent). *Metropolitan Montreal and Toronto,* as might be expected, both had in excess of 25 per cent of the dealers list the $500 and Over" category as providing the highest dollar volume of sales. Montreal still had half the dealers claim the medium-priced lines as most important; in Toronto, by contrast, all those not listing the high-priced lines claimed the bulk of their sales were in the low-priced category.

C Dining Room Furniture (Table 3 – page 32)

1. Best Selling Style – Past Year



(i) Canadian Average

The demand for specific styles in dining room furniture is not quite as pronounced as in the field of bedroom furniture. It is especially interesting that, at the listing of third-best seller, 14 per cent of the dealers claimed that *no one style* had a commanding appeal. First mention was given to *Contemporary* by 27 per cent of the dealers, to *Spanish* by 24 per cent (bedroom furniture was 32 per cent and 34 per cent respectively), then to *Commercial Modern* by 19 per cent (bedroom had been 23 per cent). Including the top three mentions, the pattern did follow in general that for bedroom furniture with 61 per cent of the dealers including *Spanish,* 60 per cent *Contemporary, Colonial* showing strongly at 49 per cent because of the second and third mentions and *Commercial Modern* at 35 per cent. *French*, with great emphasis in the second and third mentions, was rated in the top three by 46 per cent of the dealers. This shows, perhaps, a greater desire for formality in the furnishing of dining rooms than bedrooms.

(ii) Significant Differences from Canadian Average

As with bedroom furniture, so for dining room, every *Newfoundland* dealer interviewed listed Contemporary as the best-selling style; Spanish had third mention from half the dealers. For the *Maritimes*, Contemporary, Colonial and French were all mentioned by 57 per cent of the dealers as being in the top three; only one third included Spanish that high up the list of popularity. In *Quebec*, 30 per cent of the dealers gave first place to Spanish and 73 per cent (the highest proportion in all Canada) placed it within the top three. Colonial, consistently popular, was placed in the top three by 61 per cent of the dealers (again the highest proportion in Canada) Commercial Modern was listed within the first three choices by 49 per cent of the dealers. *Ontario* was almost exactly on the national average; the minor exceptions were Commercial Modern (slightly less popular than the average) and Italian (rather more popular). The *Prairies'* main variation was that Colonial was considerably less popular than the average for Canada. In *British Columbia* first mention was given to Contemporary by 40 per cent of the dealers and 90 per cent listed it in the top three. Commercial Modern had minimal popularity, only 10 per cent listing it within the first three choices. The most interesting phenomenon in the *Metropolitan Communities* is the high proportion of stores claiming "no one style" as being a best seller – even on their first choice 11 per cent of *Montreal* dealers stated this, by the third choice 29 per cent of those in *Toronto* indicated it.

2. Fastest Growing Style

(i) Canadian Average

For dining-room furniture, 79 per cent of the dealers in Canada indicated that *no one style* had sales growing faster than any other. Even *Spanish* was given fastest growing rating by only seven per cent of the dealers.

(ii) Significant Differences from Canadian Average

The general lack of a single fastest growing style was reported throughout the country. In Quebec 11 per cent claimed Colonial dining room furniture to be the fastest growing. *Ontario* alone gave any special emphasis to Italian, with seven per cent of its dealers. A full 30 per cent of *British Columbia* stores claimed Spanish to be the fastest growing – probably the same dealers who gave this rating to Spanish for bedroom furniture.

3. Trend re Groupings

With regard to groupings of dining-room furniture, dealers were asked specifically if the demand for tables and chairs *without matching case goods* was increasing.

(i) Canadian Average

When questioned about bedroom furniture, five-sixths of the dealers indicated that "standard suites" accounted for most of their sales. For dining-room furniture this "standard suite" proportion was down substantially; 43 per cent of the dealers in Canada showed a trend towards purchase of tables and chairs alone, *without matching case goods.*

(ii) Significant Differences from Canadian Average

The trend away from standard suites was most marked in *Quebec* where 61 per cent claimed a move away from them. In both the *Maritimes* and *Ontario* only 35 per cent showed such a trend.

4. Price Categories

(i) Canadian Average

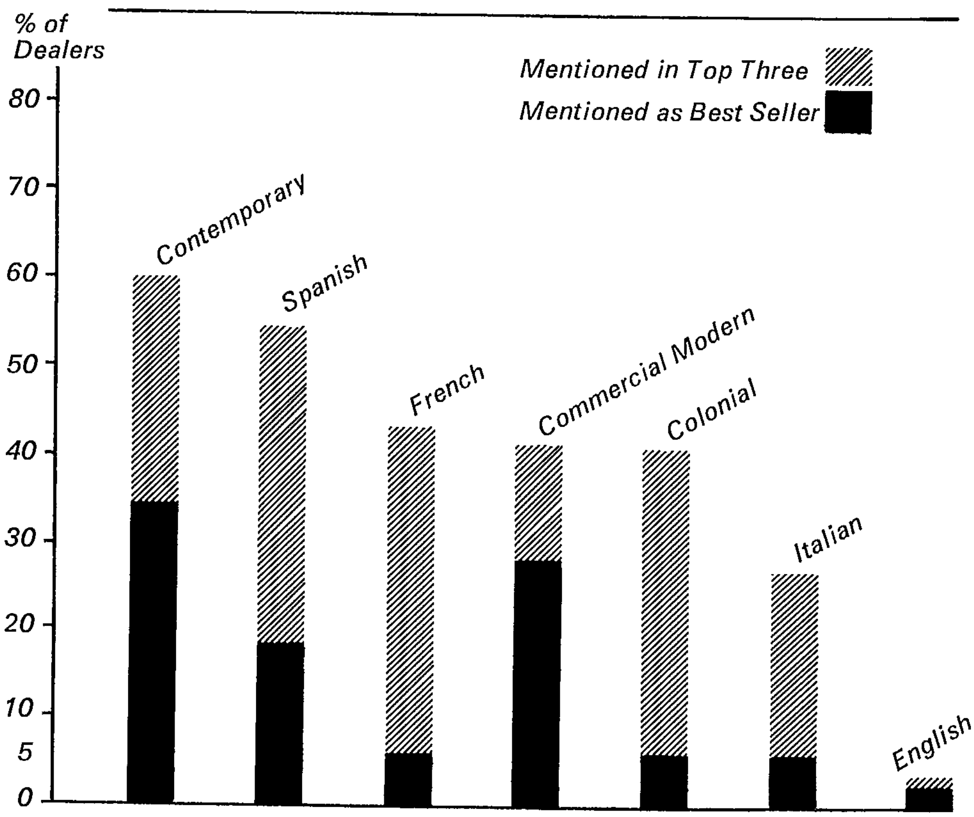
For 24 per cent of dealers the low-priced "Under $400" category provided the highest dollar volume of dining room furniture sales; for 48 per cent the medium-priced "$400 to $599" category was the most important and for a full 28 per cent the high-priced "$600 and Over" group provided the bulk of their dollar sales. (In bedroom furniture the proportions had been 38, 51 and 11 per cent respectively.)

(ii) Significant Differences from Canadian Average

The *Maritimes, Ontario, Prairies* and *British Columbia* all reported a very small proportion of "low-priced" furniture – only 10 per cent to 15 per cent of the dealers; in *Quebec* 53 per cent of the dealers derived their biggest volume sales from this category. The *Metropolitan Communities,* especially *Toronto,* had a considerably larger of sales in the high priced "$600 and Over" than the national average.

D Occasional Furniture

1. Best Selling Style—Past Year (Table 4— page 33)



(i) Canadian Average

On the basis of first choices only as to best selling style of occasional furniture, *Contemporary* led with 34 per cent of the dealers listing it. *Commercial Modern* was next with 26 per cent. However, on the basis of considering the top three best sellers, *all styles* (with the exception of *Italian* and *English* which had 28 per cent and four per cent respectively) lay in the range from 42 per cent to 60 per cent of the dealers. And by the third choice 18 per cent of dealers said "*none*" was outstandingly popular. It is obvious that for occasional furniture no one or two styles have the commanding lead over others that was found in bedroom furniture.

(ii) Significant Differences from Canadian Average

In the *Maritimes,* otherwise following the national pattern, only, 21 per cent of the dealers included Spanish in the top three. Quebec, as for other kinds of furniture, gave a relatively low rating to Contemporary (35 per cent compared with 60 per cent for all Canada) and an above average rating to Colonial. Commercial Modern was also well above the average popularity (57 per cent compared with the overall rating of 42 per cent). Conversely, *Ontario* dealers put Contemporary well ahead of the Canadian average and Commercial Modern well below. The major difference on the *Prairies* is the very low rating given to Colonial—only 14 per cent of the dealers included it in the top three choices. *Department Stores* across the country also indicated a lower than average preference for Colonial. French style was rated above average in popularity by them. In *Metropolitan Toronto* not a single dealer included Colonial style occasional furniture in the top three choices for popularity.

2. Fastest Growing Style

As might have been anticipated from the inconclusive pattern revealed by the question on "best selling" styles, *no one style* has been indicated as developing sales more quickly than any other. Considering all the dealers across the country, 87 per cent indicated this. The proportion varied from 70 per cent in British Columbia through 79 per cent in Ontario and 97 per cent in Quebec to 100 per cent in Newfoundland.

III Trends—Upholstered Furniture

1. Three-Year Style Trend (Table 5-page 34)

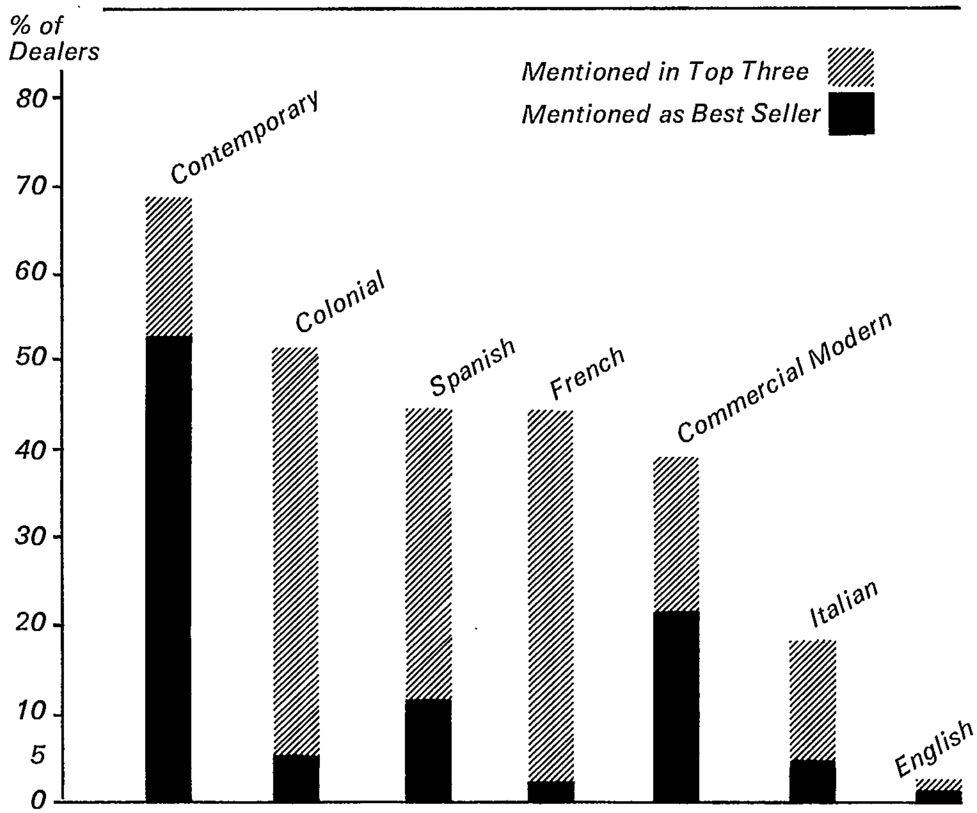
(i) Canadian Average

The style trend in upholstered furniture over the past three years is very like that for case goods. Spanish had the strongest upward trend; 71 per cent of the dealers indicated an increase, 19 per cent "no change" and only 10 per cent a decreasing sales trend. As with wooden bedroom furniture, *Colonial* style upholstered showed the second strongest growth trend over the past three years; this was the net result of half the dealers indicating increases, mostly in the under 25 per cent range, one-third showing "no change" and the balance a moderate decreasing trend. *Contemporary* style upholstered was the next, and showed a much stronger upward trend than case goods of the same style; the pattern of dealer response was very like that for Colonial style. *Commercial Modern* showed a considerable overall increase, the responses being almost identical with those for case goods, i.e. one-third of the dealers indicating increased sales of the style, 56 per cent "no change" and 10 per cent modest decreases. *Italian* had, on balance, a slight upward trend. *English* and *French* styles in upholstered had a mild downward trend.

(ii) Significant Differences from Canadian Average

Newfoundland dealers indicated a much stronger upward trend for Contemporary than for any other style, even Spanish. The *Maritimes,* while following the national pattern generally, seemed to show the strongest overall upward sales trend in upholstered furniture of any region in Canada. It showed, too, particularly strong increases in Commercial Modern and Italian. *Quebec* dealers indicated a strong interest in Colonial, with almost 65 per cent of them showing increases, 25 per cent "no change". For Contemporary, contrary to the experience in other regions, they showed almost no growth trend over the past three-year period. One-quarter of the dealers showed "no change", the others were evenly split between increases and decreases. *Ontario's* pattern was very close to the Canadian average except in Colonial style for which the growth trend was considerably less than the average. The *Prairie Region* showed an even lower growth trend for Colonial, the second highest in Canada for Commercial Modern; Contemporary also had an upward trend greater than the national average. In *British Columbia* Colonial showed a very strong upward trend, Commercial Modern one much less than the average. Most of the British Columbia stores carrying Italian style upholstered furniture registered a decrease in its popularity over the past three years.

2. Best Selling Style-Past Year (Table 6-page 35)



(i) Canadian Average

Contemporary as might be expected, had the most dealers claiming it as the style leading in popularity. It was the first choice of 52 per cent of the dealers and was included within the top three by 69 per cent. *Commercial Modern* though next in order of first choices (22 per cent of the retailers) was mentioned in the top three by only 38 per cent. *Colonial* and *French* styles, with considerable popularity as second and third mentions, were ahead of it in overall popularity 52 per cent and 44 per cent respectively. *Spanish* was also listed within the top three by 44 per cent of the dealers, spread relatively evenly over the three mentions. *Italian* had an overall rating of 19 per cent, *English* two per cent. On the first choice for best-selling style only two per cent of the dealers answered *"none"*; by the third choice this proportion had risen to 21 per cent.

(ii) Significant Differences from Canadian Average

Every *Newfoundland* dealer gave first choice to Contemporary. The *Maritimes,* with 72 per cent of the dealers giving it first choice and 94 per cent putting it in the top two, indicated overwhelming popularity for Contemporary. In *Quebec,* Commercial Modern with 30 per cent and Spanish with 24 per cent of the dealers led in first choices. Spanish, with continuing strength on second and third choices, led in overall popularity, being mentioned by 64 per cent of the dealers. Colonial, very strong in second and third choices, was second overall with a 59 per cent mention. Contemporary, which had led in the national average, had an overall rating of only 43 per cent, giving it fourth rank in the province. *Ontario* and the *Prairies* were very close to the average for Canada, being fractionally stronger in Contemporary, slightly lower in Spanish. Ontario also rated Commercial Modern less popular than the national average; the Prairies gave a much lower rating to Colonial. In *British Columbia* Spanish style unpholstered furniture was well below the national average in popularity; Colonial was well above. *Department stores* generally placed Spanish and Colonial very low in popularity compared with the national average; they placed French (55 per cent listing it in the top three) and Commercial Modern (at 48 per cent) a good ten points above the average. *Metropolitan Montreal and Toronto* dealers placed Spanish well above the Canadian average – 64 per cent listed it in the top three compared with 44 per cent for all Canada. Contemporary at 56 per cent was thirteen points below the average. One of the highest ratings for any style anywhere in Canada, was given to French style upholstered in Toronto – 86 per cent of the dealers put it in the top three; the overall national average for this style was 44 per cent.

3. Fastest Growing Style

(i) Canadian Average

As with other kinds of furniture, the proportion of retailers indicating that *no one style* of upholstered furniture is growing in popularity faster than any other is very high – 62 per cent. (Wooden bedroom, dining-room and occasional were 65, 79 and 87 per cent respectively.) The only significant exceptions were *Contemporary* – 15 per cent of the dealers and *Spanish* – 12 per cent.

(ii) Significant Differences from Canadian Average

The emphasis given to the growing popularity of specific styles did range as high as 29 per cent for Spanish in the *Maritimes* and 30 per cent for Contemporary in *British Columbia.*

4. Trend re Groupings and Individual Pieces

(i) Canadian Average

With regard to single sofas as compared with today's standard 2-piece suite, 19 per cent of the retailers claimed that the single sofa was gaining in favour. (Expressed the other way, 81 per cent of dealers still consider that standard suites are the big seller in unpholstered furniture. For bedroom furniture the standard suite figure was 85 per cent, for dining room only 57 per cent.)

As for other kinds of upholstered pieces which have had considerable publicity, especially in the United States, Canadian dealers indicated the following: *Love Seats* – 33 per cent showed sales gains; *Convertible Sofas* – 51 per cent had gains; *Reclining Chairs* – 67 per cent said there had been gains. In addition there were some 11 per cent of the dealers who indicated that other unspecified pieces were also gaining in popularity.

(ii) Significant Differences from Canadian Average

Insofar as single sofas versus standard suites are concerned, only the *Maritimes* region, with 29 per cent of the dealers indicating gains for single sofas, is significantly different from the Canadian average of 19 per cent.

Newfoundland indicated above average interest in both love seats and reclining chairs. *Maritime* dealers showed above-average sales gains for all the non-standard items; the 93 per cent rating given for convertible sofas was by far the highest in Canada. *Quebec* had less-than-average gains for both seats and reclining chairs. The only item significantly different in *Ontario* was convertible sofas for which 41 per cent of the dealers showed a gain compared with the national average of 51 per cent. This was attributable specifically to the influence of *Metropolitan Toronto* which at 29 per cent was far below the country wide figure. *Metropolitan Montreal* likewise indicated a less favourable response to convertible sofas than the rest of Quebec. Both these Metropolitan Communities had, in fact, a below-average response to all the "other" unpholstered items considered, with the exception of single sofa sales in Montreal.

5. Price Categories

The examination of price categories for bedroom and dining room furniture was conducted on an over-all basis, without reference to style. For upholstered furniture it was decided to determine the possible inter-relationship of price and style. It was anticipated from the outset that styles in upholstered, particularly two-piece suites, would not be quite as readily identified as those in wooden household furniture. The results of this part of the survey tend to confirm this view.

(i) Canadian Average

Of the dealers carrying *Commercial Modern,* 70 per cent stated that the low price category "under $300" provided the highest dollar volume of sales from that style; 29 per cent claimed medium price ("$300 to $499") Commercial Modern was the heaviest seller. This indicates a rather high price level if the latter suites were indeed Commercial Modern. On the other hand, 36 per cent of the dealers indicated that the biggest selling *Contemporary* styles were in the low price bracket. It is highly likely that a fair portion of the low priced "Contemporary" would be more properly classified as "Commercial Modern". Allowance being made for this possibility, the 61 per cent of dealers claiming medium priced Contemporary to be the big seller would be increased proportionately. The only other style having a seemingly anomalous sales pattern is *English.* Low-priced English was claimed to be the best seller by 26 per cent of dealers carrying the style; medium-priced by 58 per cent and high priced ($500 and Over) by 16 per cent. It is conceivable that a certain proportion of the low priced "English" is cheaper versions of the Lawson and other upholstered styles of English derivation. For the other styles – *Spanish, Colonial, French* and *Italian* – low-priced adaptations were claimed to provide the highest volume of sales by between six per cent (French) and 13 per cent (Colonial) of the dealers. The medium price range was listed as the best seller by 69 per cent (Spanish) to 80 per cent (Italian). High-priced versions of these styles provided the greatest sales volumes for only 13 per cent (Italian) to 21 per cent (Spanish and French) of the dealers.

(ii) Significant Differences from Canadian Average

In the *Maritimes* 37 per cent of the retailers claimed medium-priced Commercial Modern to be the best selling category, a proportion which seems high. However, the same phenomenon being observed in the *Prairies* as well, it is possible that transportation costs may push some of the prices above the arbitrary "Under $300" which was used to define the "low-priced" category. In *Quebec* the concentration on medium-priced Spanish was greater than anywhere else in Canada; 86 per cent of the dealers claimed it to be the best seller – other price categories were practically excluded. For Colonial style there was rather more than the national emphasis on the cheaper versions. The *Prairies* tended to give somewhat greater emphasis to the high-priced Colonial, French, and Italian styles than did the national average. This may be the same sort of reflection of transportation costs mentioned above for Commercial Modern.

IV Finishes–Case Goods

The relative important of various finishes, as applied to the seven basic styles of case goods, was included in the study to determine whether or not the commonly accepted finishes for these styles are still meeting with customer approval. Unlike the situation relating to popularity of styles as such, there are in Canada few significant regional differences in the relative importance of finishes.

1. Contemporary Style

Walnut led overwhelmingly as the most popular finish on Contemporary case goods – 78 per cent of the dealers listed it as their first choice, and it was included in the top three by 88 per cent. *Fruitwood* was the next in popularity; 27 per cent listed it for second place, 39 per cent in the top three. Maple, rather unexpectedly, was included in the top three by 22 per cent of dealers, mostly as the third choice. So great was the stress on Walnut as the finish for Contemporary style furniture, however, that for the second choice one-third of the dealers recorded *"None"*.

2. Spanish Style

The dark, frequently distressed finish used for Spanish had to be listed as *Other* in answering the questionnaire, thus 40 per cent of the first choices were given to that category. *Walnut,* which in its darker tones is frequently applied to Spanish, received 29 per cent of the dealers' first choices. *Fruitwood* gained 15 per cent of first choices. In consequence of the heavy stress on Walnut and on Other for first choice, for their second choice over half the dealers replied *"None"*.

3. Colonial Style

As Walnut was for Contemporary, so *Maple* with 80 per cent of the first choices was acclaimed as *the* finish for Colonial style furniture. Second choices of 10 per cent of the dealers for *Fruitwood* and of 13 per cent for Antique Paint indicated a fair amount of interest in these other finishes, particularly the use of *Antique Paint* which some manufacturers have been emphasizing recently. Maple is, however, certainly predominant and for their second choice half the dealers replied *"None"*.

4. French Style

The most popular finish for French style furniture is *Fruitwood,* which received almost 85 per cent of the first choice votes. However, for the second choice only 30 per cent of the dealers stated "None", an indication that some other finishes also command customer favour. Although Fruitwood was listed by over 90 per cent of dealers in the top three choices, *Walnut,* because of heavy emphasis in their second choices, was listed by 55 per cent. *Antique Paint* was given a place in the top three by 18 per cent of dealers.

5. English Style

Walnut is the most popular finish for English style furniture, with one-third of the dealers who handle the style listing that finish as their first choice. Half show it in the top three. However, even on first choice one-quarter of the dealers listed *"None"* as being dominant. One third of the dealers listed *Other* as amongst the top three choices of finish; this would undoubtedly include Oak. There is not, therefore, any one finish which really predominates where English Style is concerned; it is also likely that the term "English" itself is not clearly defined in the minds of dealers and the public.

6. Italian Style

Walnut and *Fruitwood* were claimed to be the outstandingly popular finishes for Italian style furniture – *Walnut* being included in the first two choices by 77 per cent of dealers and *Fruitwood* by 51 per cent of them. About the same relative proportions had also been held by these two on dealers first choices. About 38 per cent of the dealers listed *"None"* on their second choice.

7. Commercial Modern

For furniture designated as Commercial Modern in style, *Walnut* is the leading finish; 76 per cent of the dealers showed it for their first choice and 88 per cent included it in the top three. *Fruitwood* with interest shown evenly in first, second and third choices, was the next in popularity. It was included in the top three by 21 per cent of the dealers. *Maple* was third, with 16 per cent of the dealers including it. Second and third choices for actual finishes were fairly thinly represented because half the dealers had *"None"* as their second choice and three quarters of them *"None"* as their third.

V Merchandising Trends

A Breadth of Line

Retailers in Canada offer very full lines of furniture to their customers. For example, of the 150 participating in the survey, every one carried bedroom, occasional and upholstered lines; only three (one each in the Maritimes, Quebec and Ontario) did not carry dining room furniture as well. As to styles, practically every dealer offers Contemporary, Spanish, Colonial and French, both in case goods and upholstered furniture. Italian, Commercial Modern and English styles are not carried as universally. Details are set out below.

1. Contemporary Style

Fully 96 per cent of the dealers carry Contemporary case goods and upholstered furniture. Most of the exceptions are in Quebec, especially in Metropolitan Montreal.

2. Spanish Style

Spanish style case goods are available from 95 per cent of the furniture retailers in Canada, upholstered from 91 per cent. Newfoundland showed the smallest proportion of dealers carrying Spanish.

3. Colonial Style

Both case goods and upholstered items, in Colonial style, are offered by 95 per cent of the dealers. Their availability is spread evenly across the country.

4. French Style

French style furniture is quite readily obtainable in Canada, with 93 per cent of the dealers interviewed indicating that they carry this particular style. Only 85 per cent of Maritime dealers handle it. In Ontario the proportion is 98 per cent.

5. English Style

English style, introducted in the last two years or so as an alternative to Spanish, has not caught on yet with either customers or dealers. Of dealers actually handling it, only two or three per cent list it amongst their top three best sellers; and barely 48 per cent of the dealers in the survey stated that they even handle this style, in either case goods or upholstered versions. The proportion ranged from 70 per cent in British Columbia to nil in Newfoundland. The best representation for English style was in Metropolitan Toronto.

6. Italian Style

Italian style has good representation in Canada. On an overall basis 87 per cent handle case goods versions and 84 per cent upholstered. The poorest representation is in Quebec where only 76 per cent carry case goods and 65 per cent handle upholstered Italian style.

7. Commercial Modern

One-quarter of the retailers claim that they do carry furniture classified as Commercial Modern. The examination of prices, however, indicated that additional furniture, especially from the Contemporary style category, should be classified as Commercial Modern. It is likely, therefore, than the proportion of dealers carrying Commercial Modern is considerably over 75 per cent. In the Maritimes 93 per cent of the dealers stated that they handle this style; in Ontario the figure was 68 per cent. In Newfoundland only 33 per cent of the dealers indicated that they carried Commercial Modern.

B Mix and Match

Dealers were asked whether there was a growing trend amongst customers towards assembling their own groups of furniture, mixing styles and finishes, rather than purchasing matched sets. The answer was very close to an even split-51 per cent of dealers claimed that there was such a trend, 48 per cent said "no", one per cent (actually two dealers) were unable to answer.

British Columbia and Ontario displayed the most traditional approach to furniture buying – only 40 per cent and 45 per cent respectively of the dealers in those provinces indicated an increase in the trend to "mix and match". In fact, Metropolitan Toronto was extremely conservative – just 14 per cent of the dealers answered "yes". Metropolitan Montreal, by contrast, had 56 per cent in the "yes" category. The Prairies showed the strongest trend towards "mix and match" with 63 per cent of the dealers answering "yes".

C Design Co-ordinated Lines

Although half the dealers claimed that there was a trend by customers to assemble their own groupings, 70 per cent also claimed that they found stocking a fully design co-ordinated line of bedroom, dining room, occasional and upholstered furniture to have a merchandising advantage.

This claim that design co-ordination is advantageous was general across the country, ranging from 56 per cent of the dealers in the Prairies, through 68-70 per cent in Newfoundland, Quebec and Ontario to 100 per cent of those in British Columbia.

Something of an anomaly exists in Metropolitan Toronto. There the examination of the "mix and match" situation showed a conservative 14 per cent of dealers finding a trend towards it. At the same time only 29 per cent have indicated that a merchandising advantage is derived from carrying design co-ordinated lines.

On an overall basis, dealers indicated that the advantage of design co-ordinated lines was about evenly split between larger initial sales and more customer repeats. In the Maritimes, however, larger initial sales were claimed to be, by far, the most important advantage; in British Columbia it was customer repeats.

D Franchising

Two-thirds of the dealers stated that they sell franchised lines of furniture. The only significant differences from this national average occurred in Newfoundland (only one-third handle franchised lines) and the Prairies (over three-quarters handle such lines).

Of the two thirds of the dealers who do handle franchised lines, 80 per cent claim that it gives them a competitive merchandising advantage. This percentage ranges regionally from 50 per cent in British Columbia to 80 per cent in Ontario, 91 per cent in Quebec and 100 per cent in Newfoundland. Department stores at 83 per cent found slightly more advantage in handling franchised lines than did other furniture stores. The Metropolitan Communities of Montreal and

Toronto claimed overwhelmingly that there are competitive advantages in handling franchised lines.

E Imports

Imported furniture is sold by 40 per cent of Canadian dealers. British Columbia and Quebec are the only regions varying significantly from this average. In British Columbia 60 per cent handle imports, in Quebec 27 per cent. There is substantial variation by type of store as well – 62 per cent of department stores reported that they sell imported furniture compared with only 35 per cent for the other furniture dealers. The proportion of department stores handling imported furniture rises to 83 per cent in Ontario and 100 per cent in the Prairies. In Metropolitan Montreal 44 per cent of all the dealers interviewed reported selling imported furniture; in Toronto the proportion was 71 per cent.

Well over half the dealers who sell imported furniture claimed that the principal advantage is exclusivity; a quarter gave price as the main advantage. Design or style and other various advantages were claimed by a quarter of the dealers. However, of the small percentage of Quebec dealers who do sell imports 60 per cent gave price as the advantage. Department stores weighted exclusivity and price almost equally as advantages and one-fifth of them stressed design or style.

Twelve per cent of the dealers handling imports did not give any indication of the percentage of sales which they represent. Of those who did, 10 per cent claimed that imports accounted for 25 to 35 per cent of sales; another 10 per cent that they accounted for 12 to 20 per cent of sales. The heaviest concentration was at the 10 per cent of total sales level – slightly over 40 per cent of dealers reporting the impact of imports indicated that they represented this proportion of sales. Almost 15 per cent said that approximately five per cent of their sales are derived from imports. For the remaining 25 per cent of who handle imported furniture, this item represents only one to two per cent of their total sales. In the Metropolitan Communities, almost 60 per cent of the dealers handling imports indicated that they represented 10 per cent of their sales; a quarter of them indicated proportions in excess of this, one dealer claiming that imports made up over half his sales.

The principal source of imports, as expected, is the United States. Only 20 per cent of the dealers handling imports indicated other sources – five per cent said that England was the major supplier, five per cent Scandinavia and 10 per cent "other". In almost all regions the United States is the major source of supply for 80 per cent of importing dealers. (The one exception is Quebec where only a relatively small proportion of dealers handle imports in any event. There the United States was the principal supplier for 60 per cent of such dealers.) By far the most important supplying region of the United States, again as expected, is the southeast, essentially North Carolina. The north and north-east regions of the United States shared about equal importance with North Carolina for Canadian dealers in Newfoundland, the Prairies and British Columbia.

VI Suppliers

The number of furniture suppliers with whom any given retailer deals may vary from less than five to over 100. The greatest concentration lies in the range of 11 to 20 suppliers; 30 per cent of the retailers purchase from that many. Another 25 per cent deal with 21 to 40 suppliers. This still leaves 14 per cent of the retailers who buy through 10 suppliers or less and 31 per cent who buy from more than 40 suppliers – in fact six per cent of the retailers deal with over 100 suppliers.

It is the department stores, by and large, who purchase from a considerable number of suppliers. In fact half of them are in the category of retailers having more than 40 sources of supply; another 20 per cent deal with 21 to 40 suppliers.

Appendix I

STUDY 4181

WOODEN AND UPHOLSTERED
HOUSEHOLD FURNITURE – DEALERS INTERNATIONAL SURVEYS LIMITED

QUESTIONNAIRE

Good Morning/Afternoon. I am Mrs._______of International Surveys Limited. We are currently conducting a study with retail dealers of wooden and upholstered household furniture. May I ask you a few questions on this subject please? The information you provide will appear only as statistics in conjunction with those of many other retail dealers.

The styles of furniture we are considering are classified under seven basic style-groups:

1. Contemporary
2. Spanish
3. Colonial
4. French
5. English
6. Italian
7. Commercial modern

HAND RESPONDENT CARD "A"

1. Please list, *in order of importance*, your three best selling styles, in dollars of sales, for each of the following types of furniture: (JUST TELL ME THE STYLES BY CODE NUMBER (EXAMPLE: ENGLISH IS 5)

STYLE IMPORTANCE	BEDROOM	CASE GOODS DINING ROOM	OCCASIONAL	UPHOLSTERED
First	11-______	14-_______	17-_______	20-_______
Second	12-______	15-_______	18-_______	21-_______
Third	13-______	16-_______	19-_______	22-_______

2. Is there any *one* style in each category that is growing faster, in dollars of sales, than any other? (CIRCLE "NONE" IF ALL ARE EVEN)

BEDROOM	23-(1)
DINING ROOM	(2)
OCCASIONAL	(3)
UPHOLSTERED	(4)
NONE	(12)

HAND RESPONDENT CARD "B"

3. For each o fthe furniture styles and types (Case Goods and Upholstered) please tell me *"By Letter of Trend Description"* what the sales trend has been over the *last three years.*

1. SHARP DECREASE (-25% or more)
2. SIZEABLE DECREASE (-10% to 24%)
3. MODERATE DECREASE (Less than -10%)
4. NO CHANGE
5. MODERATE INCREASE (Less than - 10%)
6. SIZEABLE INCREASE (10% to - 24%)
7. SHARP INCREASE (25% or more)

STYLES	CASE GOODS	UPHOLSTERED
1. Contemporary	24-____	31-____
2. Spanish	25-____	32-____
3. Colonial	26-____	33-____
4. French	27-____	34-____
5. English	28-____	35-____
6. Italian	29-____	36-____
7. Commercial Modem	30-____	37-____

HAND RESPONDENT CARD "C"

4. Would you please tell me by alphabetical symbol, the three finishes: (1) Fruitwood, (2) Walnut, (3) Maple, (4) Enamel, (5) Antique Paint, (6) Other in order of importance for each of the following styles of "Case Goods":

	FIRST	SECOND	THIRD
1. Contemporary	38- ______	39- ______	40- ______
2. Spanish	41- ______	42- ______	43- ______
3. Colonial	44- ______	45- ______	46- ______
4. French	47- ______	48- ______	49- ______
5. English	50- ______	51- ______	52- ______
6. Italian	53- ______	54- ______	55- ______
7. Commercial Modern	56- ______	57- ______	58- ______

5. In BEDROOM FURNITURE which of the following account for most of your sales: (CHECK ONE)

59- (1) Standard suites (bed or headboard, chest and dresser)

(2) New groupings consisting of ____________________
specify,

(3) Open stock

6. In DINING ROOM FURNITURE is the demand for tables and chairs without matching case goods increasing?

YES 61-(1)   NO (2)

7. In BEDROOM SUITES (bed, double dresser, chest) which of the following regular retail price groups provides your highest dollar volume of sales? (CHECK ONE)

UNDER $300 (5) $300 TO $499 (6) $500 & OVER (7)

8. In DINING ROOM GROUPS (table, 4 chairs, buffet or china cabinet) which of the following price groups provides your highest dollar volume of sales? (CHECK ONE)

UNDER $400 (9) $400 TO $599 (0) $600 OR OVER (11)

9. In UPHOLSTERED 2-PIECE SUITES which category in each style provides your highest dollar volume of sales?

		UNDER $300	$300 TO $499	$500 & OVER
1. Contemporary	62-	(1)	(2)	(3)
2. Spanish		(5)	(6)	(7)
3. Colonial		(9)	(0)	(11)
4. French	63-	(1)	(2)	(3)
5. English		(5)	(6)	(7)
6. Italian		(9)	(0)	(11)
7. Commercial Modern	64-	(1)	(2)	(3)

10. Please tell me if any of the following furniture pieces are showing sales gains:

65 (1) Single sofas (rather than 2-piece suites)
(2) Love seats
(3) Reclining chairs
(4) Convertible sofas

11. In all furniture types is there a growing trend among your customers to assemble their own groups mixing styles, finishes, etc. as against matched sets?

YES 66-(1) NO (2)

12. If you stock a fully design co-ordinated line of bedroom, dining room, occasional and upholstered furniture (such as colonial) have you found that it has a merchandising advantage?

YES (4) NO (5) -SKIP TO Q. 14

13. If so, has this advantage been in larger initial sales (7) or more customer repeats (8)?

14. How many wooden and upholstered household furniture suppliers do you have?

67-
68-

15a. Do you sell any franchised lines of furniture?

YES 69-(1) NO (2)–SKIP TO Q. 16

b. Does this give you a competitive merchandising advantage?

YES (4) NO (5)

16a.Do you sell any imported furniture?

YES 70-(1) NO (2) -SKIP TO BASIC DATA

b. Is the advantage due to (4) exclusivity, (5) price, (6) other?__________

c. What percentage of total sales does it account for?__________%
72- 73- 74-

d. Which country is the major supplier?______________
IF THE UNITED STATES:
Which oart of that country? ________________ 77-
78-
79-
80-

NAME OF RESPONDENT:______________________

NAME OF COMPANY ______________________

ADDRESS:______________ CITY___________TEL. NO.______

INTERVIEWER'S NO.: | | | |

INITIALS: ______

TABLE 1

SALES TREND – PAST THREE YEARS

Case Goods

Canada Total – % of Retailers Interviewed

	Contemporary	Spanish	Colonial	French	English	Italian	Commercial Modern
Sharp Decrease (-25% or More)	6	3	2	3	2	5	0+
Sizeable Decrease (-10% to -24%)	4	5	5	11	2	7	2
Moderate Decrease (Less Than -10%)	17	1	7	15	3	11	5
No Change	31	12	31	36	28	33	39
Moderate Increase (Less Than +10%)	22	20	22	17	6	19	13
Sizeable Increase (+10% to +24%)	10	29	14	4	1	6	7
Sharp Increase (+25% or More)	3	20	10	3	1	3	4
Style Not Carried	4	5	5	7	52	13	25
Unspecified	3	5	4	4	5	3	5
TOTAL	100	100	100	100	100	100	100

TABLE 2

BEST SELLING STYLE – BEDROOM FURNITURE

Canada Total

(% of Retailers Interviewed Mentioning)
(Style as First, Second or Third Choice)

		Mention		Total
	First	Second	Third	
Contemporary	32	22	13	67
Spanish	34	30	14	78
Colonial	6	19	27	52
French	0	9	15	24
English	1	–	1	2
Italian	3	10	12	25
Commercial Modern	23	9	12	44
None	1	1	6	6

TABLE 3

BEST SELLING STYLE – DINING ROOM FURNITURE

Canada Total

(% of Retailers Interviewed Mentioning)
(Style as First, Second or Third Choice)

	Mention			Total
	First	**Second**	**Third**	
Contemporary	27	17	16	60
Spanish	24	22	15	61
Colonial	12	16	21	49
French	9	20	17	46
English	1	–	1	2
Italian	4	9	6	19
Commercial Modern	19	8	8	35
None	2	6	14	14
Type Not Carried	2	2	2	2

TABLE 4

BEST SELLING STYLE – OCCASIONAL FURNITURE

Canada Total

(% of Retailers Interviewed Mentioning)
(Style as First, Second or Third Choice)

	Mention			Total
	First	Second	Third	
Contemporary	34	13	13	60
Spanish	19	19	15	53
Colonial	5	15	22	42
French	5	21	17	43
English	3	–	1	4
Italian	5	13	10	28
Commercial Modern	26	12	4	42
None	3	7	18	18

TABLE 5

SALES TREND – PAST THREE YEARS

Upholstered

Canada Total – % of Retailers Interviewed

	Contemporary	Spanish	Colonial	French	English	Italian	Commercial Modern
Sharp Decrease (-25% or More)	4	1	2	3	2	5	–
Sizeable Decrease (-10% to -24%)	5	4	5	10	2	7	2
Moderate Decrease (Less Than -10%)	10	4	6	17	3	11	5
No Change	31	16	31	35	25	25	40
Moderate Increase (Less Than +10%)	21	21	20	13	6	19	13
Sizeable Increase (+10% to +24%)	13	25	17	5	2	5	7
Sharp Increase (+25% or More)	8	16	9	6	1	5	4
Style Not Carried	4	4	5	7	53	16	24
Unspecified	4	9	5	4	6	7	5
TOTAL	100	100	100	100	100	100	100

TABLE 6

BEST SELLING STYLE – UPHOLSTERED FURNITURE

Canada Total

(% of Retailers Interviewed Mentioning)
(Style as First, Second or Third Choice)

		Mention		Total
	First	Second	Third	
Contemporary	52	11	6	69
Spanish	11	19	14	44
Colonial	5	25	22	52
French	2	21	21	44
English	1	–	1	2
Italian	5	6	8	19
Commercial Modern	22	9	7	38
None	2	9	21	21

[illegible]