



E-commerce Advertising & Furniture Report 2024

Content

E-commerce

Internet Sales: The Pandemic	4 – 9
TV Advertising	10 – 13
Ad Impact	16 – 19
Consumers Mood: WRP	20 – 21
Online Purchases	22 – 27

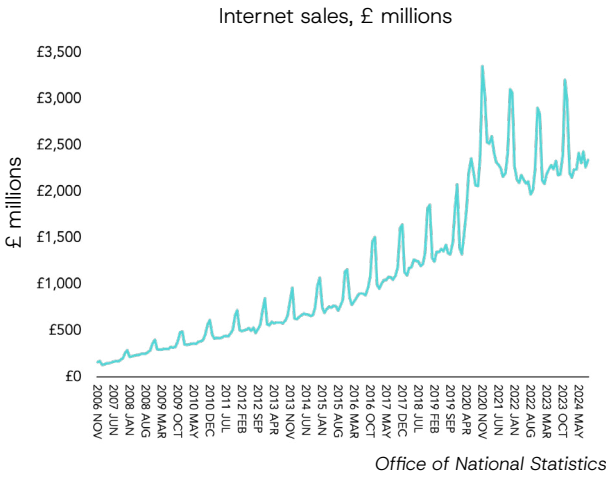
Furniture

The Evolution Of The UK Furniture And Home Improvement Market
The Influence Of Prime-Time And Weekend Peaks On Tv Advertising Engagement
Furniture & Home Improvement Industry
Monthly Trends
The Power Of 30 Seconds
The Link Between Consideration & Purchase Intent
DFS: Media Strategy
SCS: Media Strategy
Struggling Brands
How Consideration Drives Purchase Intent In The Market
Why Stimulating Web Visits Is Crucial For The Fittings Sector
Sustain Web Traffic For High Seat Ltd
Rebalancing High Seat Ltd.'S Media Plan
Quooker UK

Over the past few years, internet sales in the UK have continued on a steady ascent, showing consistent growth. The onset of the COVID-19 pandemic in Q2 2020 accelerated this trend even further, pushing more consumers to explore online purchasing options.

A side-by-side look at online sales both in absolute terms and as a percentage of total retail shows how much the composition of the market has changed, rather than the overall consumption level. While total spending remains relatively stable, a shift in consumer behaviour means that more of those sales are taking place online, and fewer are flowing through high-street or brick-and-mortar outlets. Ultimately, this points to the importance of embracing a flexible sales strategy: although traditional channels may still hold a larger share for now, the double-digit growth in online retail signals how quickly the balance could tilt further toward e-commerce in the future.

During this period, there was a remarkable 52% increase in internet sales compared with the previous

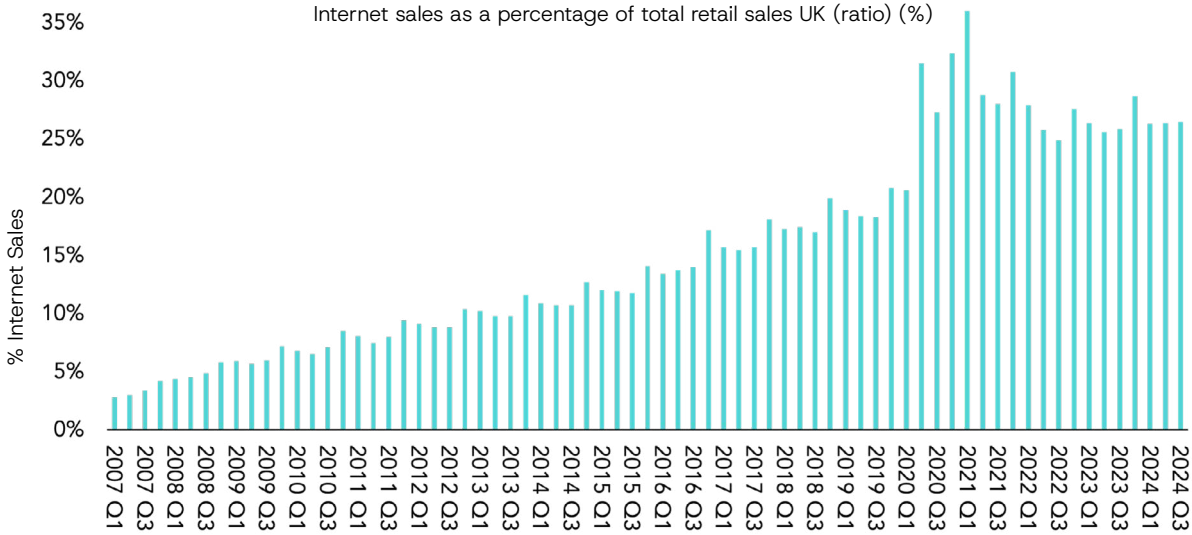


Office of National Statistics

quarter, reaching a peak of 72% when comparing Q1 2020 to Q1 2021.

Even after the pandemic subsided, the level of internet sales remained higher than the pre-pandemic levels of Q1 2020. By comparing Q1 2020 with Q1 2023, we can observe that the overall level of internet sales is up by 26%, maintaining stability up to the present day.

Interestingly, internet retail sales have mirrored this pattern, showing similar trends in growth. Additionally, there are noticeable seasonal elements, such as the significant Q4 sales, which consistently emerge as the highest sales period each year.



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UK Leads Global Growth in Internet Sales as a Percentage of Total Retail Sales

By investing in media now, brands can capitalise on these favourable conditions to establish a strong online presence, engage with a wider audience, and drive sales growth. The combination of high internet penetration, changing consumer behaviour, advanced infrastructure, retail innovation, and supportive government policies makes this an opportune time to launch or boost an online business.

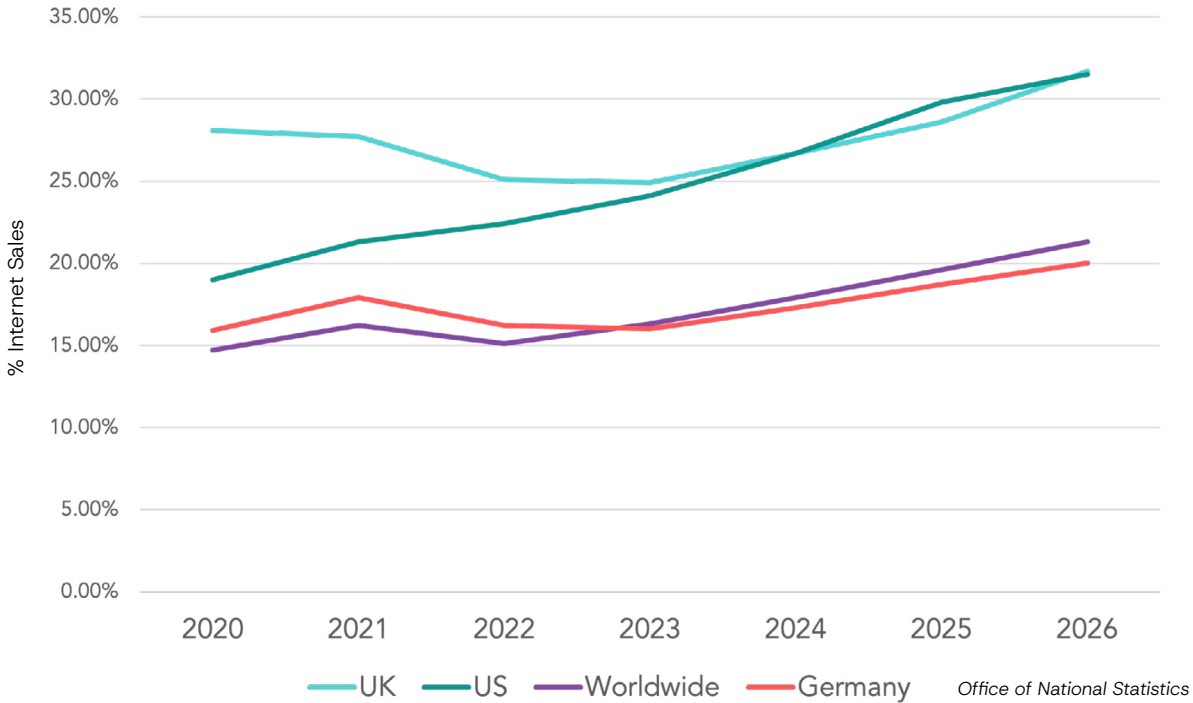
High Internet Penetration: With a large portion of the population having access to high-speed internet, brands can reach a broad audience online.

Consumer Behaviour Shift: The pandemic has accelerated the shift towards online shopping, and this trend shows no signs of reversing. Consumers are now more comfortable and familiar with making purchases online.

Advanced E-commerce Infrastructure: The UK's well-developed logistics and delivery systems ensure that online businesses can operate efficiently and meet customer expectations.

Retail Innovation: The adoption of new technologies and innovative practices by UK retailers has set a high standard for online shopping experiences, making it easier for new entrants to attract and retain customers.

Media Investments: Increased spending on digital marketing channels has proven effective in driving traffic and sales. Brands can use targeted advertising, social media engagement, and personalised marketing to capture the growing online market.



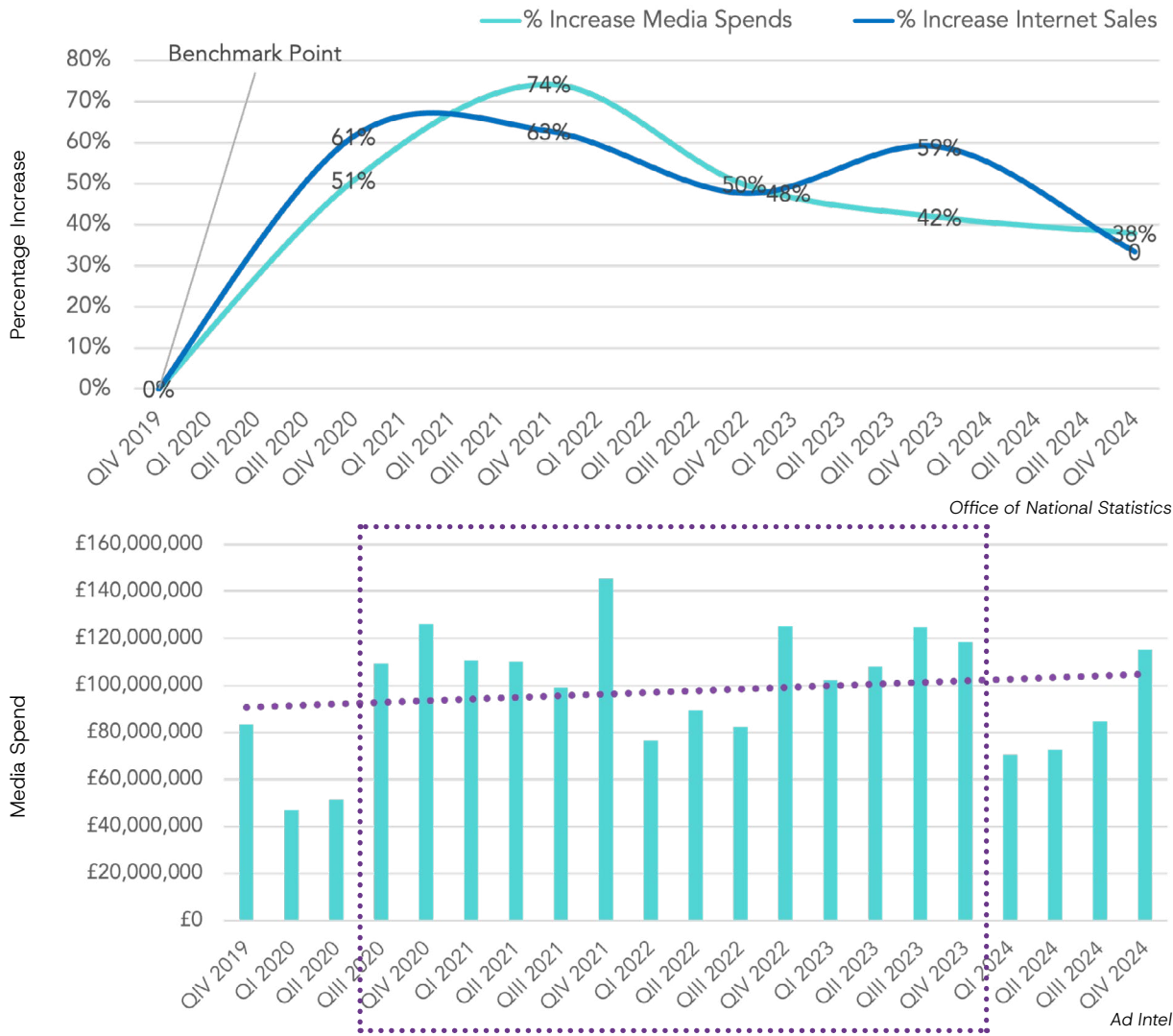
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What primarily drove the surge in online sales immediately after the onset of COVID?

The widespread restrictions and lockdowns imposed to curb the spread of the virus. These measures led to the closure of physical stores and limited people’s ability to shop in person, prompting a significant shift towards online shopping.

Consumers turned to online platforms to meet their needs, from groceries to entertainment, driving a substantial increase in online sales.

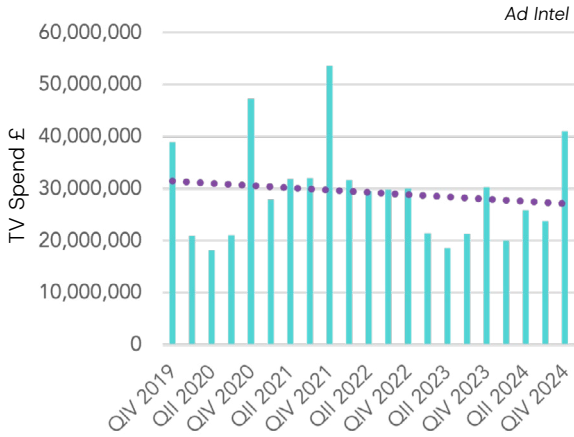
However, it’s crucial to emphasise the significant role of media channel investments by online brands. These brands capitalised on shifting consumer behaviour to enhance their marketing efforts and capture the expanding online market. (In the chart one we can note the close relationship between Increase in media Spends and Increase in Internet Sales).



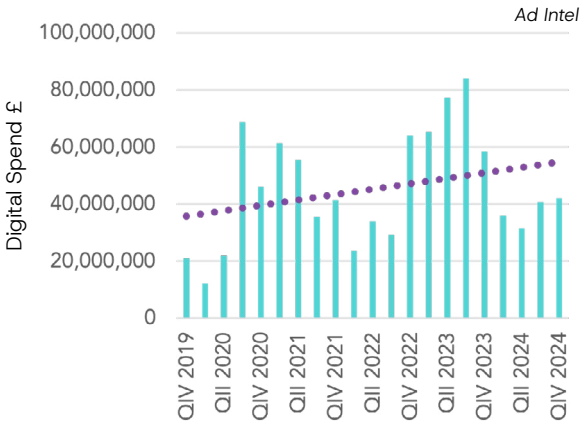
How did each media channel contribute to the surge in online sales?

In the wake of COVID, TV investments gave online sales a significant lift during the first two years. Although these investments tapered off, they remained steady, returning to pre-pandemic levels by 2024. Direct mail followed a similar trajectory, with substantial growth until Q4 2021 before gradually declining back to pre-pandemic levels.

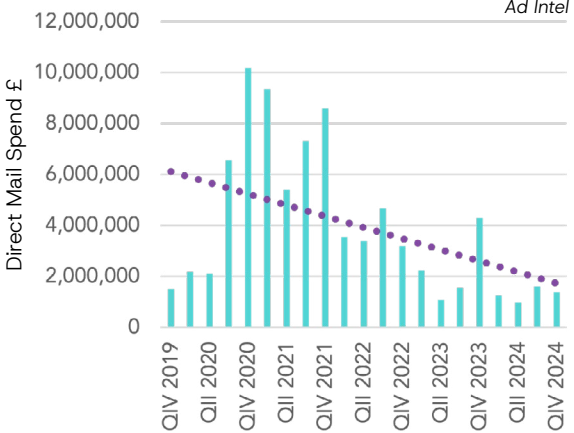
Meanwhile, Digital media saw a remarkable surge in investments, peaking in 2023. Despite a slight dip, digital media investments are still 30% higher than pre-pandemic levels, providing a sustained boost to online sales and positively impacting both the upper and lower parts of the marketing funnel.



TV investments provided a significant boost to online sales in the first two years following the onset of COVID-19. Although these investments slowed down over time, they remained relatively stable, returning to pre-pandemic levels by 2024.



Digital media experienced a substantial surge in investments, peaking in 2023. Despite a slight decrease in 2024, digital media investments remain 30% higher than pre-pandemic levels.



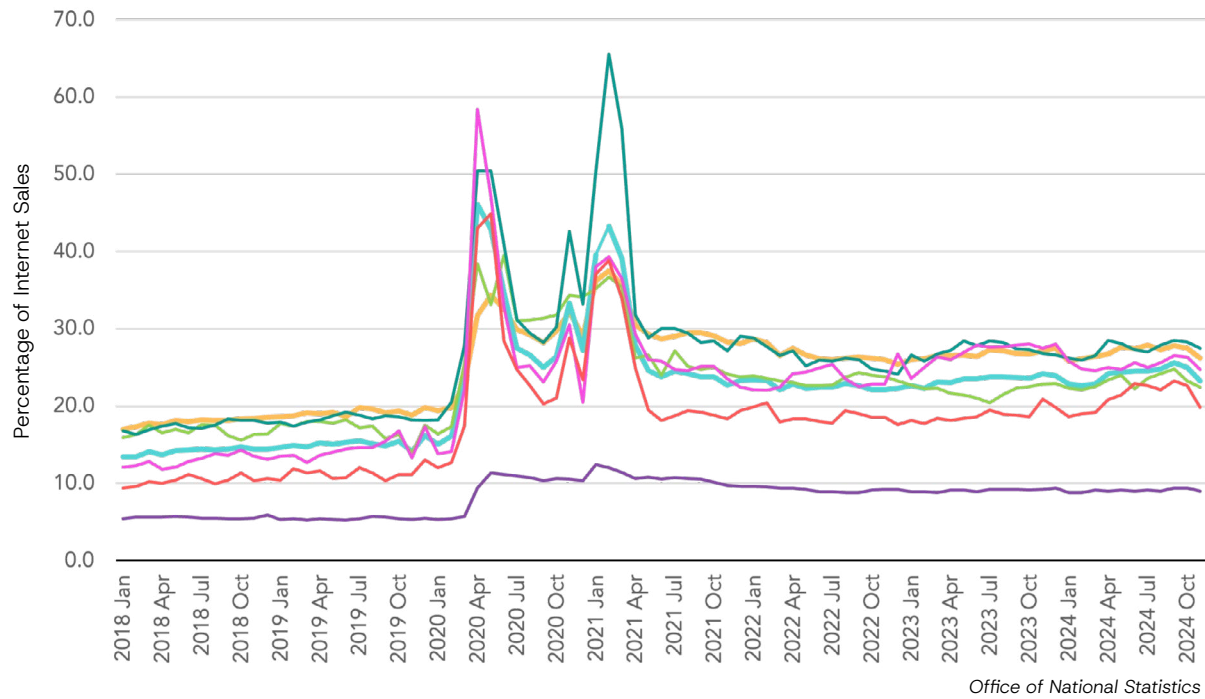
Direct mail saw massive growth in investments until Q4 2021, after which it gradually declined back to pre-pandemic levels.

The COVID pandemic significantly accelerated the shift towards online shopping, a trend that shows no signs of reversing and that represents a big opportunity.

The sustained increase in internet sales market share, even after the pandemic, can be attributed to several key factors:

- Permanent Shift in Consumer Behaviour
- Enhanced Online Shopping Experience
- Expanded Product Offerings
- Increased Digital Literacy
- Work-from-Home Culture

- All retailing excluding automotive fuel [Note 1]
- Predominantly food stores
- Total of predominantly non-food stores [Note 2]
- Non-specialised stores [Note 2]
- Textile, clothing and footwear stores [Note 2]
- Household goods stores [Note 2]
- Other stores [Note 2]



Targeted Advertising:

By using data analytics and consumer insights, brands can create highly targeted advertising campaigns. These campaigns can reach specific demographics, interests, and behaviours, ensuring that the right message reaches the right audience at the right time.

Performance-Based Media Planning:

This approach focuses on measurable outcomes, such as clicks, conversions, and sales. By investing in performance-based media, brands can optimize their marketing spend to achieve the highest return on investment (ROI). This includes pay-per-click (PPC) advertising, affiliate marketing, and programmatic advertising, which target specific audiences and track performance in real-time.

Multichannel Strategy:

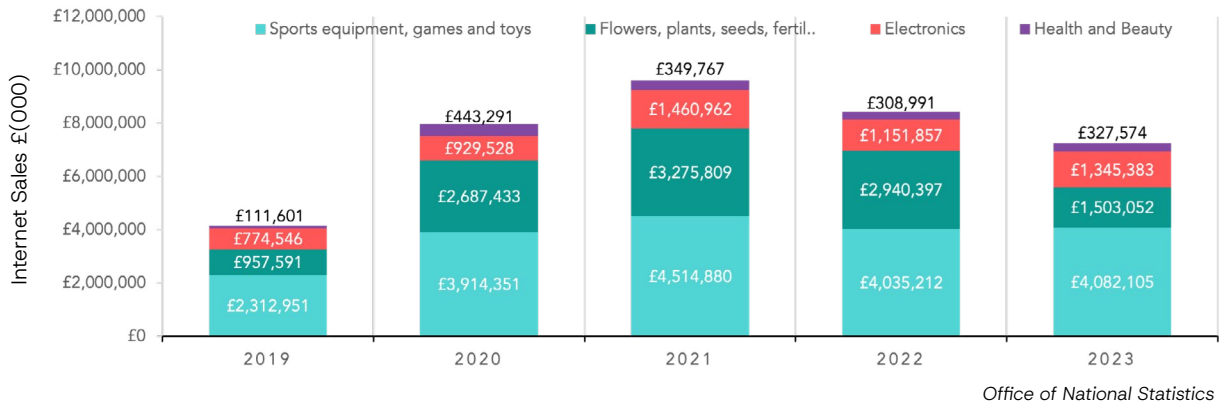
This approach can significantly benefit the e-commerce sector by maximizing reach, enhancing customer experience, and driving sales. For instance, television ads can create widespread brand awareness, while performance-based media like pay-per-click advertising ensures measurable outcomes such as clicks and conversions.

When examining the categories of e-commerce sales in the UK, Food emerges as the leader in terms of sales volume, followed by Clothing and Footwear, and then Household Goods Stores. However, when we shift our focus to the percentage increase (taking in account the inflation) in total sector sales between 2019 and 2023, the rankings change Food and Household Goods Stores take the 2nd and 3rd positions, respectively, while Clothing and Footwear show the lowest increase.

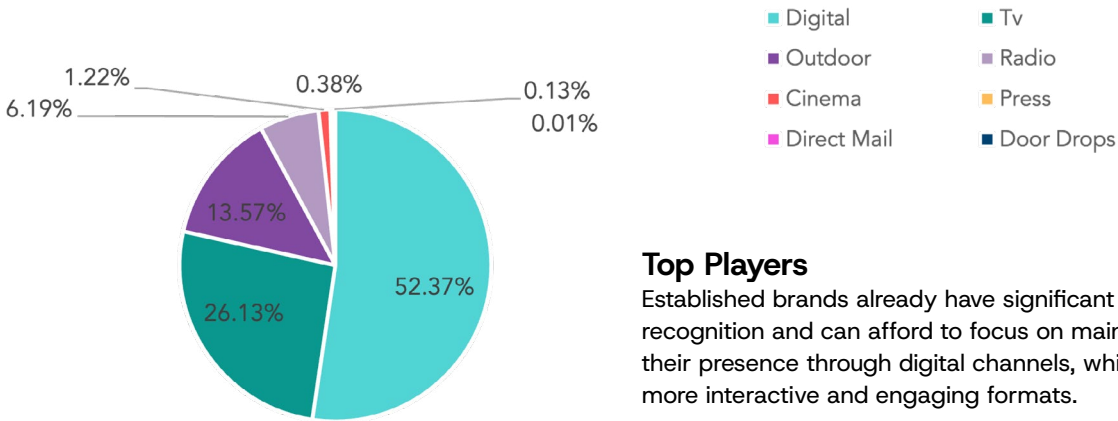
Among the Top 3 Sales Sectors, One Lags While a Smaller Sector Leads Growth

Economic Uncertainty and Inflation: The recent period of high inflation has made consumers more price-sensitive, leading to reduced spending on non-essential items like clothing and footwear. Economic uncertainty has also contributed to cautious consumer behaviour, with many prioritising essential goods over discretionary purchases.

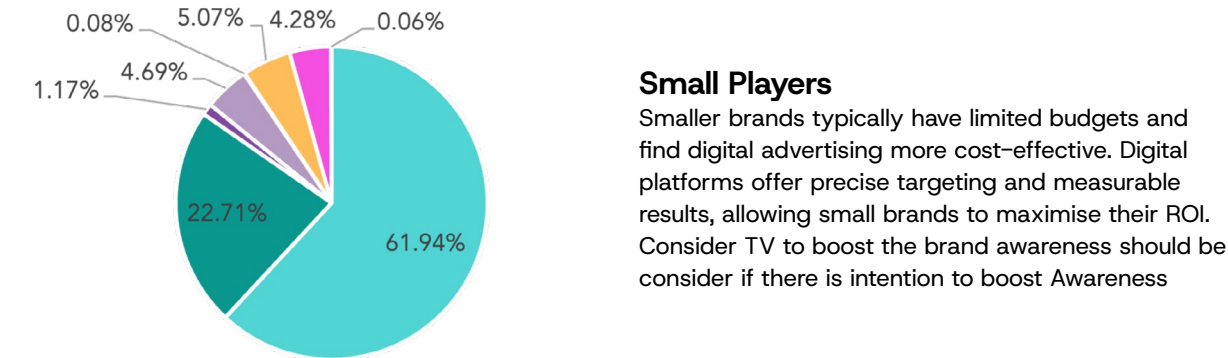
Interestingly, despite being the smallest sector in terms of sales volume, Health and Beauty is experiencing the most significant growth. When we adjust the sector volume for inflation, the growth is remarkable, with a 133% increase compared to the 2019 benchmark. This outstanding performance highlights the dynamic nature of the Health and Beauty sector in the UK e-commerce market.



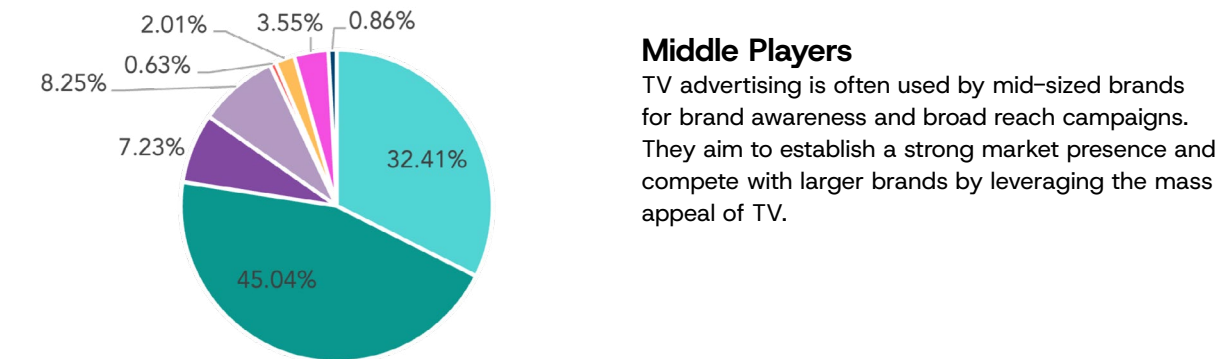
TV advertising is perceived as a premium medium that can enhance brand credibility and prestige. For mid-sized brands looking to establish themselves as serious players in the market, TV ads can provide a sense of legitimacy and trustworthiness



Top Players
Established brands already have significant brand recognition and can afford to focus on maintaining their presence through digital channels, which offer more interactive and engaging formats.



Small Players
Smaller brands typically have limited budgets and find digital advertising more cost-effective. Digital platforms offer precise targeting and measurable results, allowing small brands to maximise their ROI. Consider TV to boost the brand awareness should be consider if there is intention to boost Awareness



Middle Players
TV advertising is often used by mid-sized brands for brand awareness and broad reach campaigns. They aim to establish a strong market presence and compete with larger brands by leveraging the mass appeal of TV.

Daytime and Pre-Peak TV Ads: E-Commerce Brands Focused on Conversions with an Eye on Brand Awareness



Advertising during these times is generally more cost-effective compared to prime-time slots. E-commerce brands, especially those with moderate budgets, can achieve a higher frequency of ads and better reach without the high costs associated with peak times.

Coffee and Daytime Slots: These times are suitable for campaigns aimed at driving immediate online traffic and conversions. E-commerce brands can leverage the lower costs and higher engagement to achieve their performance marketing goals. Viewers during these times are often more relaxed and less distracted, leading to higher engagement and better ad recall. E-commerce brands can benefit from the increased attention and retention of their advertisements.

Pre-Peak Slots: Pre-peak advertising is effective for building brand awareness and creating a strong presence in the minds of consumers before they transition to their evening routines. Pre-peak slots offer a balance between cost and reach. They are less expensive than prime-time slots but still capture a significant audience, making them an attractive option for e-commerce brands looking to maximise their advertising spend.



E-commerce’s TV advertising strategy is performance-driven, targeting peak consumer activity periods like Black Friday, Cyber Monday, and Christmas.

This approach ensures that marketing efforts align with peak shopping seasons when consumers are most engaged and likely to make purchases, demonstrating a tactical shift from traditional brand-building to data-driven, **results-oriented campaigns tailored to capitalise on key retail opportunities.**

Early Year vs. Mid Year Slowdown
January–April Surge:

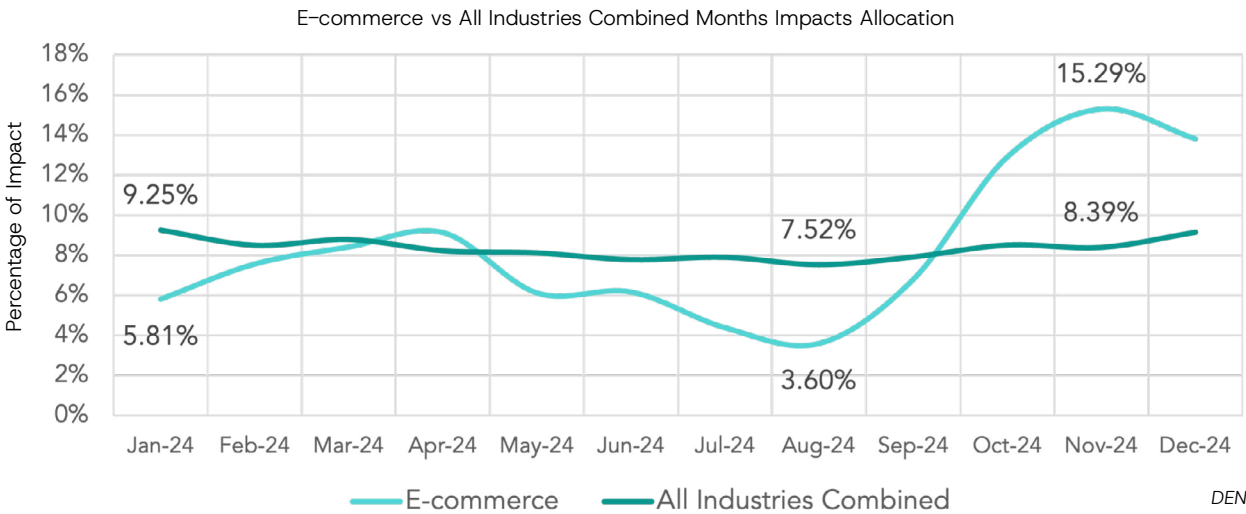
E-commerce brands ramp up quickly from a modest 5.81% in January to over 9% by April. This is somewhat higher than the combined average by spring, hinting that online retailers are keen to capture consumers emerging from the post-holiday lull, possibly with new product launches or end-of-season sales.

Summer Dip:

From May through August, E-commerce dips significantly—reaching its lowest point in July and August (4.39% and 3.60%, respectively). Meanwhile, other sectors remain more consistent, suggesting that E-commerce brands prefer to conserve resources when consumers’ attention typically shifts to holidays and outdoor activities, and online conversions may slow.

Year End Spike and the Black Friday/Cyber Monday Effect:
Once September arrives, E-commerce’s TV presence starts to climb again—peaking dramatically in October (12.90%) and November (15.29%), well above the single-digit share of other sectors. This jump coincides perfectly with the biggest online shopping events of the year: Black Friday and Cyber Monday.

In recent years, these two e-commerce-driven promotions have extended their influence across entire weeks—or even the entire fourth quarter—leading online retailers to heavily invest in TV to grab shoppers’ attention in the lead-up to and during these high-intensity sales periods. Focused, Performance-Driven Strategy E-commerce companies tend to manage TV advertising more dynamically, aligning closely with key promotional windows that drive immediate sales. They’re often more ROI-focused, funnelling their budgets toward periods when consumers are primed to shop online. The trend remains strong through December, as E-commerce investment (13.80%) continues well above other sectors (9.14%). This aligns with the holiday shopping rush—another peak opportunity for online retailers.



RM Podcast

Available to listen on Spotify, Apple Music and YouTube

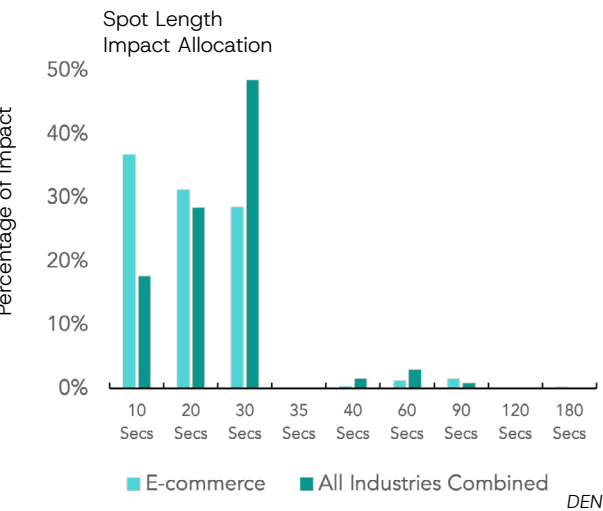
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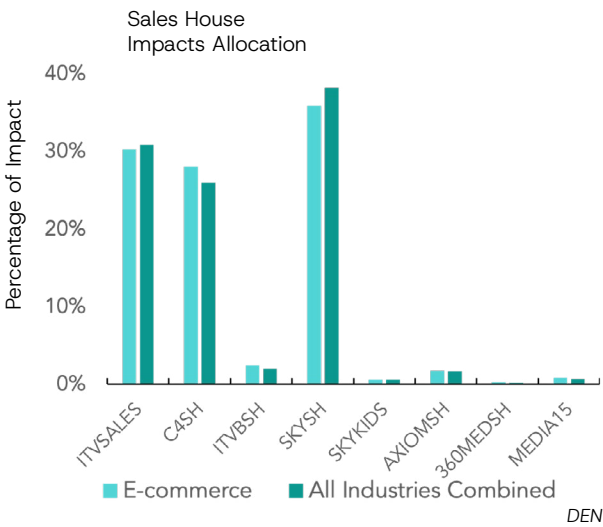
By investing in 10 second TV ads, e-commerce brands can effectively balance cost, reach, and impact, ensuring their messages resonate with modern consumers while maximising their advertising budgets.



E-commerce brands often use short video formats on digital platforms like social media and YouTube. Using 10-second TV ads ensures consistency across different channels and helps create a cohesive brand message.

Also are highly focused on performance marketing. Shorter ads allow for more precise measurement of ROI, as they can be directly linked to specific calls to action and conversion metrics.

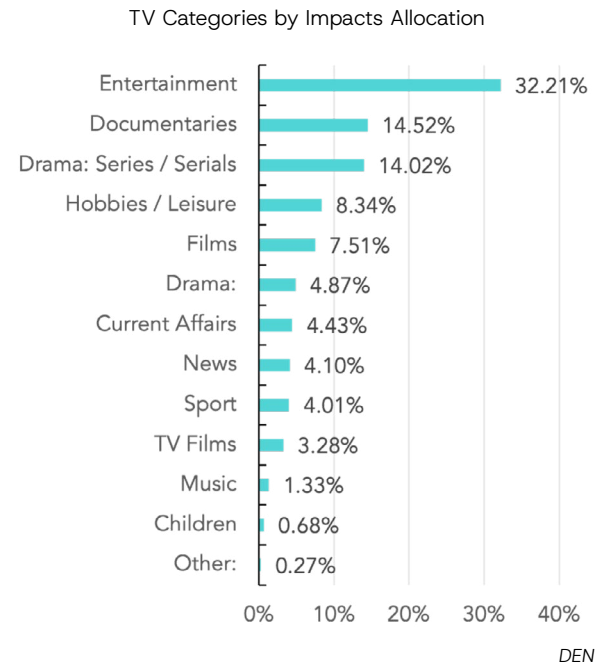
E-commerce sector’s shows a trend that aligns closely with other industries in terms of Sales house preferences. Specifically, e-commerce brands have downgraded their advertising impact on Sky by 2% while upgrading their investment in Channel 4.



Channel 4: With a strong presence in digital and on-demand content, Channel 4 offers seamless integration for cross-platform campaigns. E-commerce brands can leverage this to create cohesive advertising strategies that span TV and digital platforms2.

Sky: While Sky also has digital offerings, the integration may not be as seamless or effective for e-commerce brands focused on a younger, more digitally-engaged audience.

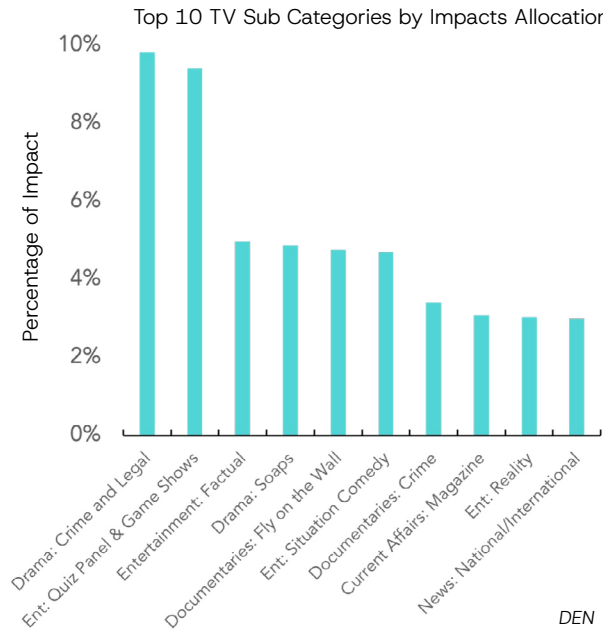
In the e-commerce sector, Entertainment, Documentaries, and Drama series have emerged as the top categories for impacts allocation. This strategic focus can be attributed to several key factors, with specific subcategories playing a crucial role:



Entertainment: Shows in this category often appeal to a wide demographic, including younger viewers who are more likely to shop online. This aligns well with the target market for many e-commerce brands. High viewership and engagement levels in entertainment shows translate to better ad performance. E-commerce brands can achieve higher reach and frequency, maximising their advertising investment. The diverse and engaged audience of entertainment shows, particularly quiz, panel, and game shows, factual entertainment, and sitcoms, translates to better ad performance and higher ROI for e-commerce brands.

Documentaries: Viewers of documentaries tend to be more informed and socially conscious. E-commerce brands can leverage this by aligning their ads with content that reflects their values and social responsibility, building a stronger connection with the audience. The authenticity and emotional resonance of documentaries lead to higher ad recall and trust. E-commerce brands can benefit from the positive association with meaningful and impactful content. The authenticity and emotional resonance of crime documentaries lead to higher ad recall and trust, providing a favourable ROI for e-commerce brands.

Drama Series: Drama series attract a diverse audience, including both younger and older viewers. This broad appeal allows e-commerce brands to reach different segments of their target market effectively. The immersive nature of drama series ensures that viewers are highly engaged, leading to better ad recall and effectiveness. E-commerce brands can capitalise on this by creating ads that complement the storytelling and emotional tone of the series. Advertising during drama series, especially crime and legal shows and soap operas, can be cost-effective while providing high engagement and ad recall. This ensures a better return on investment for e-commerce brands.

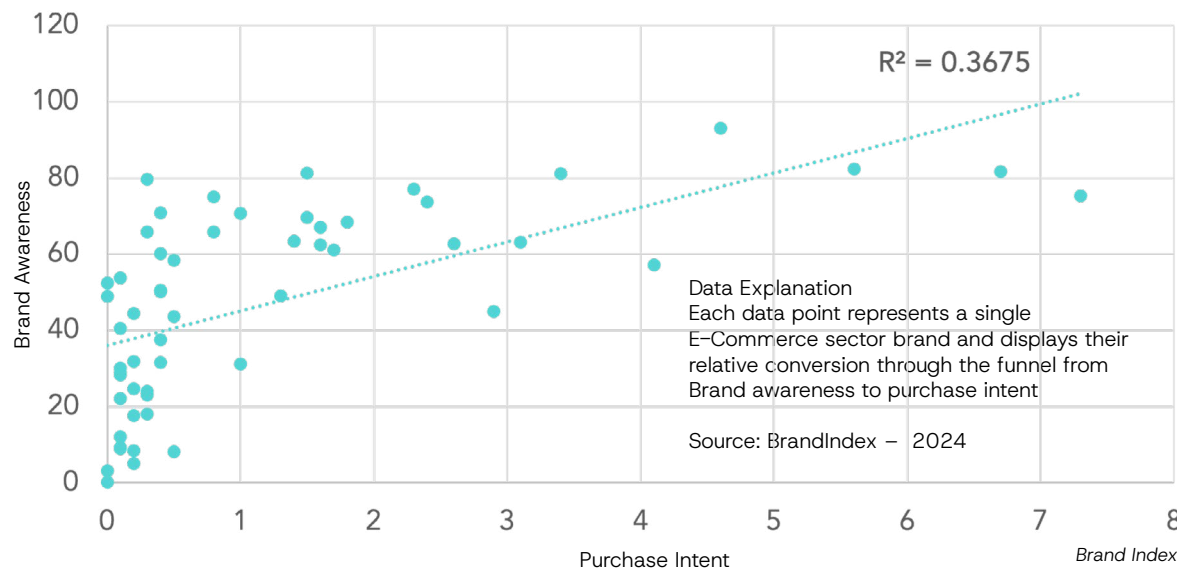


In the dynamic world of e-commerce, being “well known” doesn’t necessarily translate to sales performance.

To boost conversion, brands need to identify the program genres, times of day, and periods of the year that align with specific moods. Additionally, recognising the routine patterns of specific demographics, whether they are in good or bad mood, can significantly enhance ad effectiveness.

By targeting these segments at the right moments, brands can deliver more impactful ads that not only capture attention but also drive conversions.

A high level of brand awareness is not a guarantee that people will go on to buy from a brand. Therefore, it should not be the sole focus of marketing activities.



Analysing data from 52 e-commerce brands reveals a relatively weak correlation between top-of-funnel (brand awareness) and bottom-of-funnel (Purchase Intent) metrics within the sector. This insight challenges the common assumption that high brand awareness will automatically lead to increased purchase intent.

Brands should concentrate on creating memorable ads that resonate deeply with their target audience.

This involves understanding the nuances of consumer behaviour and preferences.

In essence, the key to successful e-commerce marketing lies in a strategic approach that goes beyond mere brand awareness. By focusing on the right timing, context, and emotional resonance, brands can create powerful advertising experiences that lead to tangible sales outcomes.

Creating memorable ads enhances Ad Awareness, while delivering them when the audience is in a positive mood can significantly boost purchase activity.

A strong correlation between Ad Awareness and Purchase Intent proves that keeping your ad top-of-mind is key to driving conversions and moving customers down the marketing funnel.

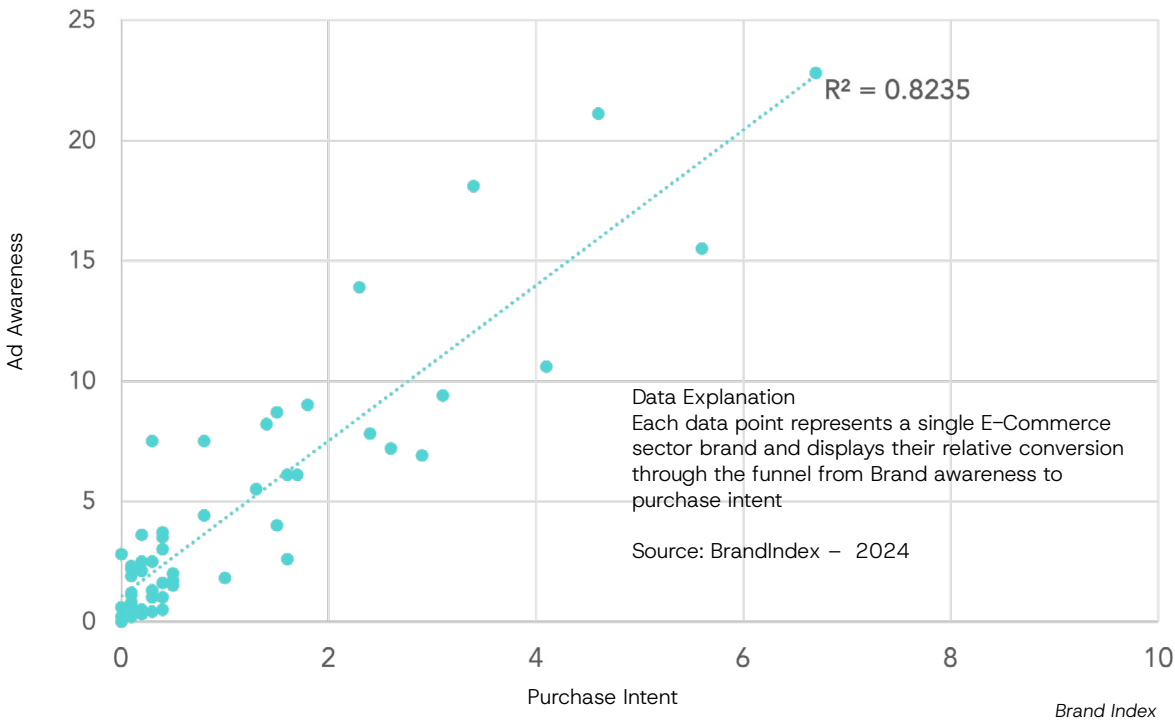
Ad recall does drive consideration and purchase intent

The same set of E-Commerce brands show a very strong correlation between awareness of advertising for each brand and their respective levels of purchase intent. This is especially important in a sector where purchase is more considered.

Therefore, brands should focus their attentions on delivering advertising activity which is memorable and

especially memorable during the moments of the day/ week/year when their mood and the linked intent to purchase really matters.

This focus on advertising recall, above brand recall, means that we can outsmart the competition by delivering more efficient and effective campaigns that translate to direct sales.



Mood is a key driver of advertising recall and has a close link with media

In the bustling world of advertising, one key element often stands out as a driver of success: mood. The connection between mood and ad recall is not just a theory but a proven fact. When consumers are in a good mood or feeling relaxed, their ability to remember advertisements significantly increases.

This intrinsic link between mood and ad effectiveness highlights the importance of understanding and leveraging emotional states in media planning.

By identifying the temporal spaces where positive moods prevail, advertisers can strategically target these segments.

Delivering ads at the right time, when consumers are most receptive, enhances the power of the message. This approach not only boosts ad recall but also facilitates smoother transitions through the lower stages of the marketing funnel, leading to higher conversion rates.

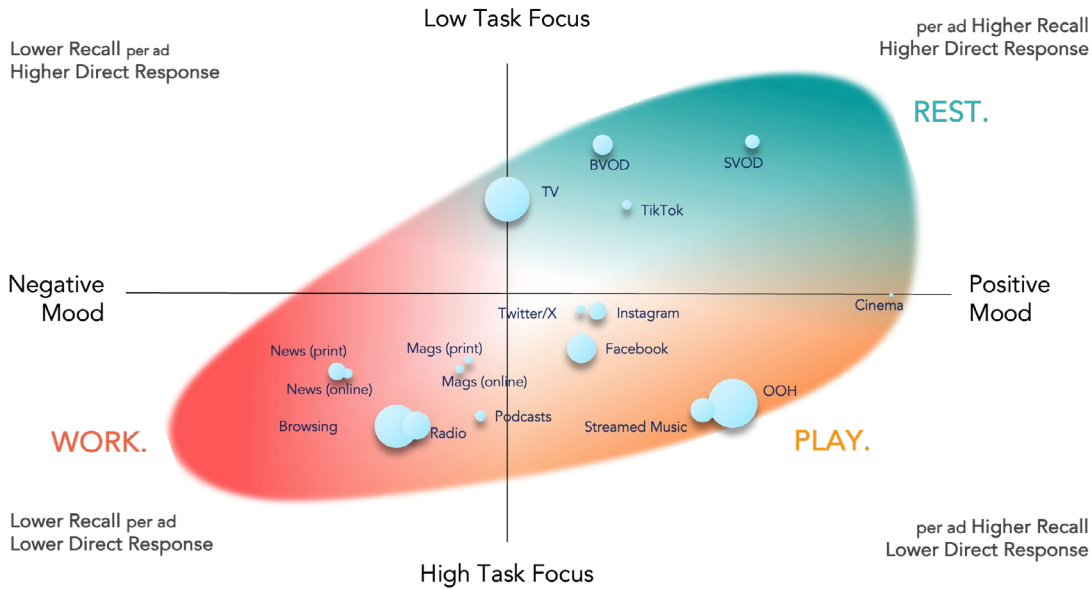


Through the use of All Response Media’s proprietary Work.Rest.Play. planning model, we can account for the mood and behavioural context in which media is consumed to efficiently maximise reach against the target audience at the times when advertising while be most effective.

There is a proven intrinsic link between mood and ad effectiveness.

Ad recall amongst consumers is higher when they are in a good mood or feeling relaxed.

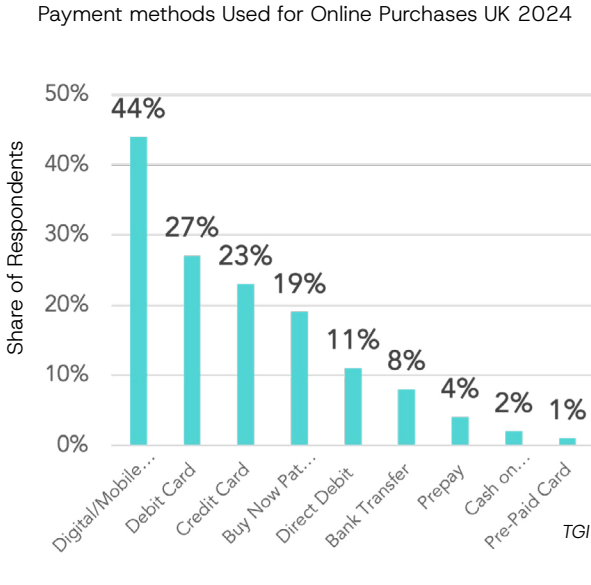
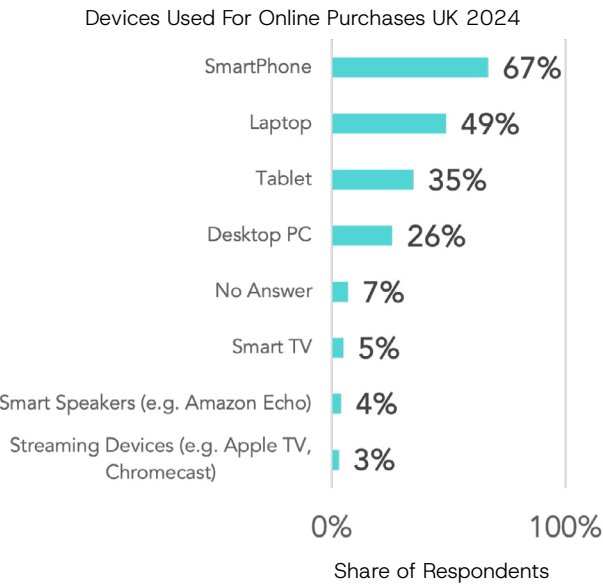
Find Out More



ARM WRP



In 2024, the landscape of online purchases in the UK is dominated by smartphones, followed by laptops, tablets. When it comes to payment methods, digital/mobile wallets lead the way, followed by debit cards, credit cards, buy now pay later options.



Targeted Ad Placement Based on Device Usage

Smartphones: Since smartphones are the most used device for online purchases, TV ads can include QR codes or short URLs that viewers can easily scan or type into their phones. This encourages immediate interaction and drives traffic to the e-commerce site.

Laptops and Tablets: Ads can highlight features that are best experienced on larger screens, such as detailed product images, videos, and interactive content. Encouraging viewers to visit the website on their laptops or tablets can enhance their shopping experience.

Smart TVs and Streaming Devices: Interactive TV ads can be used to engage viewers directly. For example, ads can include prompts to use their remote to learn more about a product or receive a discount code. This can drive immediate engagement and conversions.

Incorporating Payment Method Preferences in Ads

Digital/Mobile Wallets: TV ads can emphasise the convenience and security of using digital wallets for purchases. Highlighting partnerships with popular wallet providers like Apple Pay, Google Wallet, and PayPal can build trust and encourage usage.

Debit and Credit Cards: Ads can promote special offers, such as cashback or reward points, for using debit or credit cards. This can incentivise viewers to choose these payment methods.

Buy Now Pay Later (BNPL): Highlighting flexible payment options like BNPL in TV ads can attract budget-conscious consumers. Ads can showcase how easy it is to split payments over time without interest, making high-ticket items more accessible.



Groceries Stand Out for Online Shopping Heavy users! Solid Participation in Fashion for Moderate users and restricts online purchases to a few or occasional needs possibly electronics for Light users

Heavies are integrating e-commerce into almost every aspect of their shopping—groceries, furniture, health & beauty, etc. They look like the “all-in” segment.

Lights mostly dabble in online shopping and remain strongly oriented toward offline channels.

Moderates are comfortable buying certain categories online (specially fashion) but haven’t fully shifted routine purchases (like groceries) into e-commerce.

Marketing & Strategy Angle:

Heavy Users: Prioritise loyalty programs, personalised recommendations, and seamless cross category experiences (they’re likely to try new categories and brands if offered well).

Light Users: Start with incentives and awareness campaigns—show them that buying online can be simple, secure, and often cheaper or more convenient.

Moderate Users: Highlight how easy and beneficial it is to add new categories (especially groceries or everyday essentials) to their existing online habits.

TGI

Online Shopping Categories	Frequency of Online Shopping		
	Heavy User	Moderate User	Light User
Fashion	139	124	73
Electronics	153	83	93
DIY equipment	151	99	76
Furniture	196	92	41
Groceries	191	101	62
Health & Beauty Products	154	111	70

Moderate User

Savvy Browsers prefer to do research, compare items, and read reviews before buying. They’re not quite “heavy,” but they’re more comfortable than light users—especially on mid ticket categories (e.g., electronics accessories, clothing).

Cautious Clickers among moderate users often need reassurance—perhaps they shop online moderately for select categories (e.g., fashion deals, electronics) but still weigh risks carefully before each purchase.

Light User

Cautious Clickers often remain light users because they have trust or security concerns, or they feel less comfortable with the online process. They buy infrequently and likely stick to lower risk categories or big ticket items very occasionally (e.g., a one off electronics purchase).

Light users in general are the hardest group to convert to heavier online spending. They need a strong push toward perceived safety, ease, or cost advantage.

Heavy User

Impulse Buyers are driving a lot of heavy online shopping volume—spontaneously purchasing categories like Groceries, Furniture and even, health and beauty (as we saw earlier that heavy users buy across a wide range, including high frequency categories).

Bargain Hunters will also appear among heavy users, which aligns with the idea that once people trust e-commerce, they look for deals across multiple categories (groceries, Fashion, furniture, etc.).

TGI

User Habits	Frequency of Online Shopping		
	Heavy User	Moderate User	Light User
Savvy Browsers	89	113	105
Impulse Buyers	168	98	57
Unassuming Shoppers	85	74	78
Bargain Hunters	135	100	66
Cautious Clickers	62	111	150

Detailed Audience Insights: Understanding Generational Segments, Shopping Frequency, and Behavioural Habits for a More Effective Media Strategy

By merging generational data, frequency of online shopping habits, and category preferences, a vivid picture emerges of how different consumer groups approach e-commerce.

These cross sections of demographics, behaviours, and categories reveal exactly where, how, and why each segment engages online. By identifying who is

most likely to embrace impulse deals versus thorough comparison shopping—and linking that knowledge to generational tendencies—brands can refine their media approaches to match each group’s preferences, trust levels, and shopping triggers.

TGI

Generations	Frequency of Online Shopping		
	Heavy User	Moderate User	Light User
Pre-War - before 1946	64	122	159
Baby Boomers - 1946 - 1964	82	116	145
Generation X - 1965 - 1980	108	110	104
Xennials - 1977 - 1983	140	93	68
Millennials - 1981 - 1996	132	80	59
Generation Z - 1997 onwards	76	87	74

Connecting Generational Usage to Shopping Habits

Xennials & Millennials:

Heavy e-commerce frequency, strong overlap with behaviours like Impulse Buying (flash sales, impulse Furniture and Grocery) or Bargain Hunting (coupon codes, loyalty points). They’re also comfortable adopting routine online purchases like groceries and big items.

Gen X:

More evenly distributed—some heavy, some moderate, some light. They have the means and tech familiarity, but not everyone is fully converted to daily e-commerce. Many are Savvy Browsers, ensuring they get quality and deals before buying. Many Gen Xers buy Fashion, Health & Beauty, and occasionally Groceries, but not as routinely as younger heavy user groups.

Baby Boomers & Pre-War:

Heavily skewed toward light or moderate usage. They stick to fewer categories—maybe Gifts, special Electronics, or occasional convenience purchases but remain less comfortable with everyday or impulse-driven purchases. These groups often lean toward being Cautious Clickers (concerned about security, returns, etc.) or Unassuming occasional shoppers.

Gen Z:

Though very digital in social media use, the data suggests purchasing power or established e-commerce habits aren’t as high—yet. It could also mean many transactions happen indirectly (parents’ accounts, gift cards, etc.) or revolve around smaller items (which might not register strongly in the statistics database).





Raffaele Vitolo
Senior Business Data Analyst

“In 2025, the UK e-commerce market stands at a pivotal crossroads: media investment is no longer optional—it’s essential for breaking through fierce competition, driving real-time consumer action, and converting awareness into tangible sales. A data-driven, multi-channel strategy that embraces TV’s interactive capabilities, mobile-first engagement, and personalised messaging will ultimately separate the thriving brands from those left behind.”

The UK e-commerce sector is one of the most advanced and lucrative markets for investment in 2025, outperforming other nations in online retail penetration, digital payment adoption, and infrastructure. With the industry at a pivotal moment, media investment is no longer just an option—it is a necessity for growth, awareness, and ultimately, sales. The digital marketplace is more competitive than ever, and brands that fail to adapt their advertising strategies to shifting consumer behaviour risk being left behind. As consumers engage across multiple platforms—TV, digital, social, and mobile—having a data-driven, multi-channel strategy is the key to standing out and driving measurable results.

One of the biggest misconceptions in e-commerce is that brand awareness alone guarantees conversions. In reality, simply being well-known is not enough to drive sales. Brands must focus on ad recall, emotional impact, and timing, ensuring their message reaches consumers at the moments they are most receptive to buying. A strong correlation between ad recall and purchase intent highlights the need for campaigns that do more than just capture attention—they must actively move consumers down the funnel towards action.

TV remains a powerful force, not just for mass awareness and credibility but as a springboard for digital engagement. The most successful e-commerce brands understand that TV is no longer a one way communication channel—it is a tool that can seamlessly integrate with shoppable ads, QR codes, and interactive elements, bridging the gap between

inspiration and immediate action. At the same time, mobile-first experiences have reshaped consumer expectations. With smartphones and digital wallets dominating online purchases, ads that enable frictionless transactions—such as one-click checkout, buy now pay later (BNPL) options, and personalised recommendations—will be the most effective. Visibility is no longer enough; the focus must be on driving real time action.

Another defining factor for e-commerce success in 2025 is understanding consumer segments. Heavy users are deeply embedded in e-commerce, responding well to loyalty programmes, exclusive deals, and convenience-driven messaging. Moderate users need extra encouragement to expand their online shopping habits, while light users require trust building efforts before they convert into frequent buyers. A one-size-fits-all approach no longer works brands must craft tailored advertising strategies that align with shopping frequency, user behaviour, and generational tendencies.

This is what makes 2025 the ideal time for e-commerce brands to invest in media. The industry is evolving rapidly, and brands that strategically align their TV, digital, and performance marketing efforts will gain a decisive edge. With ARM’s expertise in data driven media planning, consumer insights, and cross platform execution, brands can outsmart competitors, maximise ROI, and create campaigns that go beyond awareness to drive tangible business growth.

Delivering better business outcomes for the UK & EU’s best e-commerce brands



 **BROOKS**
Jim Miles,
Director of Marketing EMEA,
Brooks Running

"ARM is and has been acting as a key enabler in our phases of our e-comm and in-store growth at Brooks. We are thoroughly enjoying working with their extremely talented team, turning targets into reality."

YUMOVE

Freddie's
Flowers


BELLA & DUKE

 **BROOKS**

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The Pet Wellness Experts

PURE

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ANIMALS

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JUSTEAB

 MISTER SPEX

HAPPY DOG

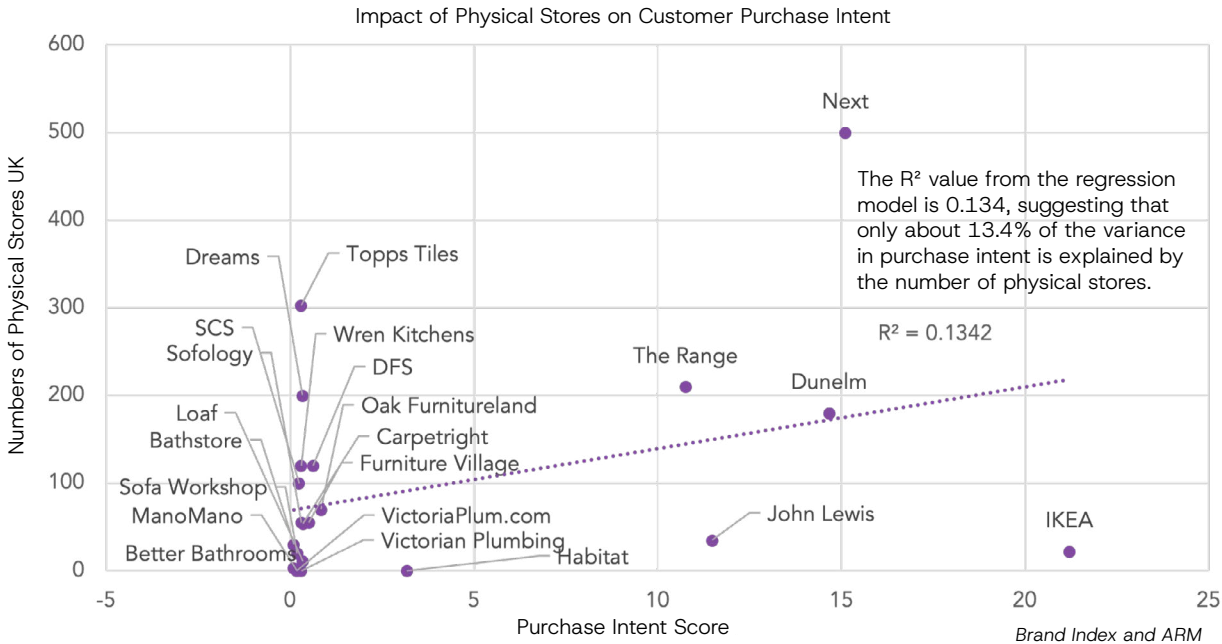
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Furniture Report

The Evolution of the UK Furniture and Home Improvement Market: The Power of Integrating In-Store and Online Experiences

For decades, furniture and home improvement retail success was deeply tied to physical store presence the logic being simple: more stores meant more visibility, higher foot traffic, and ultimately, more sales. However, consumer behaviour has shifted dramatically in the last five years. Today, people no longer rely solely on in-store visits; they research products online, compare prices, read reviews, and expect a seamless transition between digital browsing and the physical showroom experience before making a purchase. This transformation has made one thing clear: **having a large number of stores alone does not guarantee higher sales, consideration, or purchase intent.**



More Stores ≠ More Demand: The Truth Behind UK Furniture and Home Improvement

The data challenges the traditional belief that a larger store network guarantees higher purchase intent or consideration. Dreams (200 stores), DFS (128 stores), SCS (98 stores) struggle despite their physical presence, showing low purchase intent (0.3, 0.6, and 0.2, respectively) despite heavy media investments in 2024 (£30M, £22M, and £15.5M). Their reliance on showrooms and TV advertising has failed to translate into strong consumer engagement.

In contrast, IKEA (22 stores) and Next (500 stores) excel by integrating strong digital experiences with their retail presence. IKEA dominates with a purchase intent of 21.2 and consideration of 53.5, thanks to efficient media spending and an omnichannel approach. Next, with 50% of its sales online, proves that store count matters only when supported by digital convenience and seamless customer journeys.

The TV Titans: Staying True to the Classics

For brands like DFS, IKEA, Dreams, and Wren Living, television remains the undisputed battleground. They invest heavily in TV advertising, believing in its emotional impact and broad reach. These brands understand that for large-scale purchases like furniture, a strong brand presence on the big screen helps build trust and recognition. DFS, for example, pours the majority of its budget into TV, reinforcing its dominance in the sofa market. IKEA, known for its iconic campaigns, balances its TV presence with significant outdoor and radio investments, ensuring it remains a household name.

The Digital Disruptors: Betting on the Online Consumer

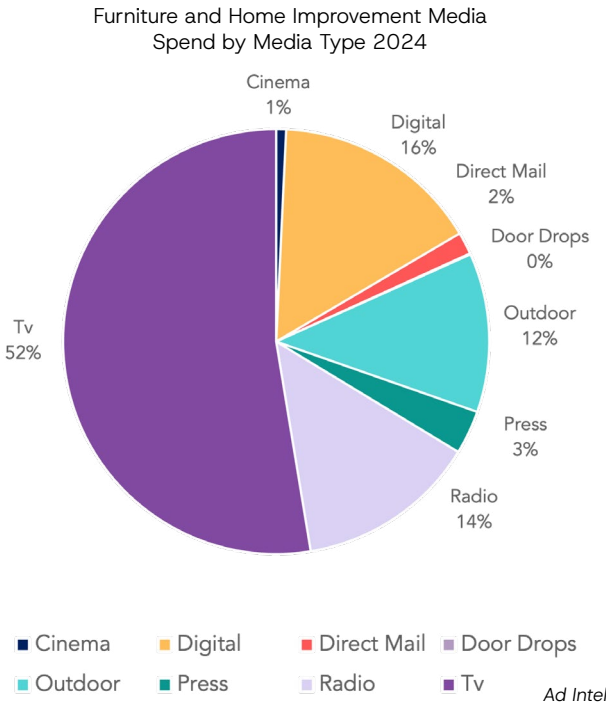
On the other side of the spectrum, brands like Dreams, Oak Furnitureland, and Topps Tiles are aggressively pushing into digital advertising. Dreams leads the way, dedicating a significant portion of its budget to digital channels, signalling a shift toward engaging consumers where they spend most of their time—online. Oak Furnitureland follows suit, recognizing that a strong digital presence can drive direct engagement and conversions. Meanwhile, Topps Tiles takes an extreme approach, skipping traditional advertising altogether and focusing almost exclusively on digital, suggesting a hyper-targeted, e-commerce-driven strategy.

The Silent Strategists: Unconventional Approaches

Some brands choose alternative advertising paths, using outdoor, radio, and print media to supplement their strategy. Wren Living and Dunelm, for instance, invest heavily in radio, ensuring their message reaches consumers during daily commutes. Habitat Group and Loaf, on the other hand, lean into outdoor and press advertising, targeting those who prefer an offline shopping experience. Loaf’s presence in outdoor advertising is particularly striking, suggesting a focus on brand visibility in high-traffic areas rather than mass media.

The Traditionalists vs. The Innovators: Who Will Win?

As the advertising landscape evolves, the battle between traditional and digital-first brands intensifies. Some, like DFS and IKEA, stick to tried-and-true methods, ensuring they remain top-of-mind through TV and outdoor ads. Others, like Dreams and Oak Furnitureland, are pioneering a new path, recognising that consumer habits are shifting toward online engagement. What this data reveals is not just how brands are spending their money, but where the industry is headed. The future belongs to those who strike the right balance between emotional storytelling, targeted digital engagement, and real-world brand presence. The question is: who will adapt and who will be left behind?



The Influence of Prime-Time and Weekend Peaks on TV Advertising Engagement in the UK Furniture & Home Improvement Sector

The rhythm of TV advertising in the UK furniture and home improvement sector follows a clear pattern, shaped by consumer habits and key industry trends. Prime-time slots reign supreme, with early and late evenings emerging as the most influential periods for media impact. As people unwind after work, their engagement peaks, making these hours a golden window for advertisers.

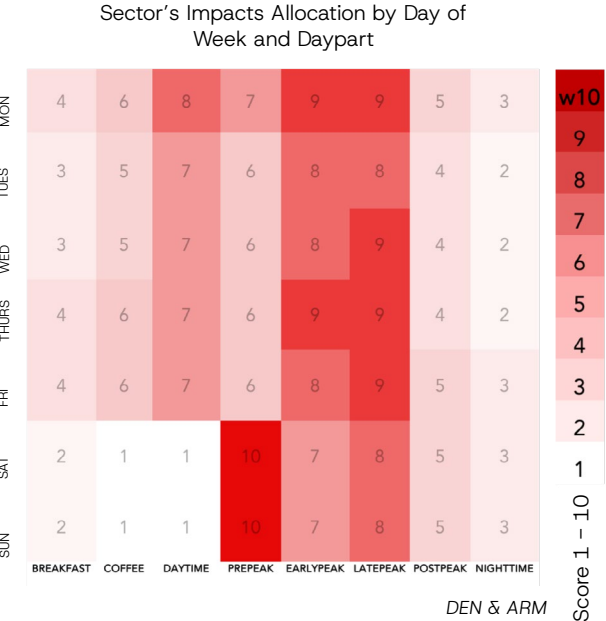
Weekends bring a shift in behaviour, with a surge in media consumption during the afternoon. As consumers focus on home improvement, shopping, and leisure activities, prepeak and late peak slots.

A Smart Strategy for Small and Medium Brands: Leveraging Coffee & Daytime Advertising for Higher Conversions

In the competitive furniture and fittings sector, prime-time advertising is often dominated by large brands with significant budgets, making it difficult for small and medium-sized businesses (SMBs) to stand out. However, a strategic shift in media investment can offer a powerful solution: Direct Response Media (DRM) in Coffee (9 AM – 10 AM) and Daytime (10 AM – 3 PM) slots.

Unlike prime-time, where viewers are passively watching TV, Coffee and Daytime audiences are often in active decision-making mode—whether they are browsing online, researching home improvements, or planning their next purchase. This makes these time slots a hidden goldmine for brands aiming to drive immediate response rather than just awareness.

For SMBs, investing in these slots presents a **cost-effective and highly targeted approach**, allowing them to:



Reach high-intent consumers who are actively considering furniture and home upgrades.

Drive direct engagement and conversions with promotions, financing offers, and interactive calls to action (e.g., "Call now for a free consultation" or "Limited-time discount for daytime viewers").

Stand out from competitors by tapping into a market segment that many larger brands overlook in Favor of expensive prime-time slots.

This strategy is particularly effective for brands looking to maximise their media budget while ensuring that their messaging reaches consumers when they are most likely to act. Instead of competing for attention in crowded evening slots, SMBs can carve out their own space during the day—where the right message at the right time can turn interest into sales.

Furniture & Home Improvement Industry: A Year in Advertising Impact Allocation

In the ever-evolving landscape of consumer behaviour within the Furniture and Home Improvement sector, the role of television advertising remains pivotal. The data presented illustrates a strategic allocation of advertising impacts across various sales houses throughout 2024, revealing critical trends that align with consumer spending behaviours and industry cycles.

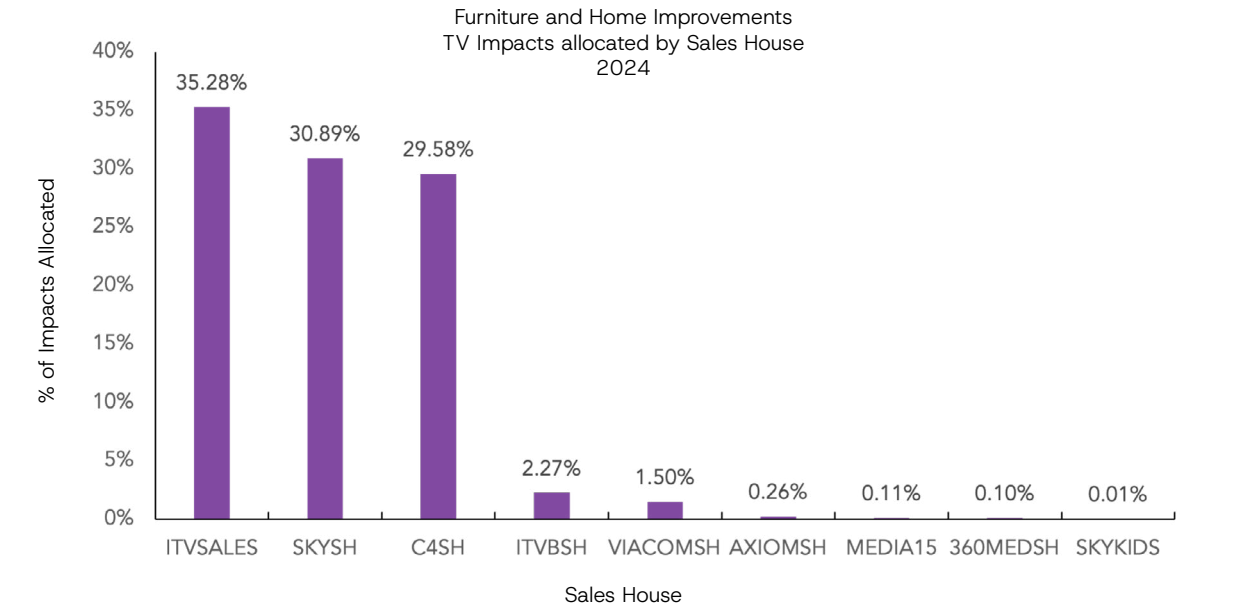
Key Sales House Performance: The Market Leaders

ITVSALES Leads the Charge (35.28%)
With 4.7 million total impacts allocated, ITVSALES emerges as the dominant player, securing over one-third (35.28%) of all impacts. This significant allocation suggests that major home improvement brands and retailers prioritize mass reach and broad consumer engagement, leveraging ITV's strong viewership.

SKYSH Captures Strong Market Share (30.89%)
SKYSH follows closely with 4.1 million total impacts (30.89%). This network is known for engaging affluent homeowners and decision-makers, a key demographic for big-ticket furniture and renovation purchases.

C4SH Shows Consistency (29.58%)
Channel 4 Sales House (C4SH) secures 3.9 million impacts (29.58%), reflecting a diverse and engaged audience that includes both budget-conscious and high-spending consumers in the home improvement space.

Smaller Players and Niche Strategies
While ITVBSH, VIACOMSH, and AXIOMSH play minor roles, their targeted approaches suggest a focus on specialised home improvement brands, direct-response campaigns, and experimental formats.



Monthly Trends: The Consumer Journey

Analysing the monthly impact allocation reveals a clear seasonal pattern that aligns with consumer behaviour in the Furniture and Home Improvement industry.

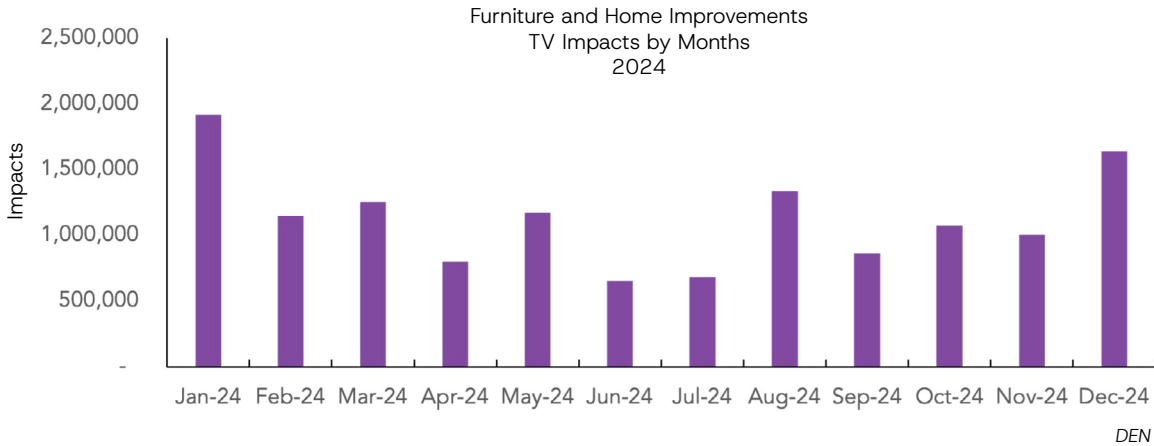
January (1.9M Impacts) – The New Year Reset
The year kicks off with the highest impact allocation, driven by New Year resolutions and home refresh projects. Retailers capitalise on post-holiday spending as consumers look to revamp their living spaces.

Spring Surge: March to May (~1.1M per month)
Homeowners start executing renovation plans as warmer weather arrives, leading to steady advertising investments. March and May see notable peaks, aligning with spring home improvement trends.

Summer Lull: June & July (~600-700K Impacts)
Warmer months witness a drop in advertising impacts, correlating with holiday seasons when consumers focus on travel rather than home investments.

August Rebound (1.4M Impacts) – The Pre-Fall Prep
August marks the start of a resurgence, with a massive increase in impacts. This aligns with consumers returning from holidays and preparing for autumn home makeovers.

Peak Season: October to December (~1.6M in December)
The final quarter sees a dramatic rise in advertising impacts. December (1.6M impacts) is the highest of the year, driven by holiday season sales, Black Friday promotions, and pre-New Year home refurbishments.



Insights for the Furniture & Home Improvement Sector

Aligning with Consumer Mindsets: The peaks in January, August, and December suggest key windows where brands should focus their advertising efforts.

Seasonal Strategies Matter: Spring and late-year periods are high-impact opportunities, while summer sees reduced engagement.

Leveraging Network Strengths: ITV and SKY dominate, but niche networks offer specialised targeting for premium or budget-conscious consumers.

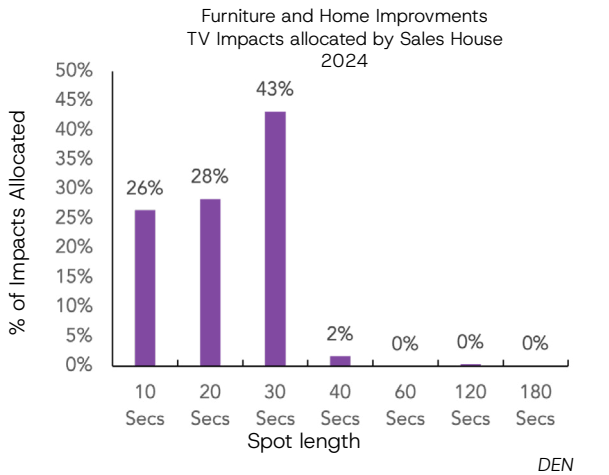
The Power of 30 Seconds: The Consumer Story Behind Furniture & Home Improvement Ad Lengths

The Science of Time: Capturing Consumer Attention in Home Improvement

In the world of Furniture & Home Improvement, advertising is about inspiration, practicality, and persuasion. Brands in this sector are not just selling a sofa or a new kitchen remodel—they are selling a vision of home, comfort, and transformation. The length of a TV spot plays a crucial role in delivering **Looking at the impact distribution of different ad lengths in 2024, a clear trend emerges:**

30-second ads dominate, making up 43.18% of all impacts—by far the most popular choice. **20-second and 10-second spots** follow closely, at 28.37% and 26.42%, respectively. **Longer ad formats (40 seconds and above) are almost non-existent**, representing less than 2% of total impacts.

“But why do consumers—and by extension, advertisers—gravitate toward shorter, punchier formats?”



Why is 30 Seconds the “Sweet Spot”?

Balanced Storytelling & Efficiency
Long enough to showcase a product, inspire, and include a call-to-action without losing attention.
Ideal for Home Improvement Buyers
Allows brands to introduce concepts, highlight benefits, and guide viewers to showrooms or websites.
Matches Viewer Behavior
Busy homeowners prefer concise, visually engaging ads over long, drawn-out commercials.

In short, 30 seconds is the perfect blend of impact, engagement, and persuasion for the Furniture & Home Improvement sector.

Why Are Longer Ads (60+ Seconds) Rarely Used?

High Costs, Lower ROI
Longer ads are expensive, and brands prefer multiple short ads spread across different days for better impact.
Shorter Attention Spans
Home improvement ads don’t require deep storytelling; clean visuals, product transformations, and a quick CTA work best.
Multi-Platform Strategy
Instead of a single long ad, brands use a mix of 30-second TV ads, 10-second reminders, and social media campaigns for sustained engagement.

What About 10 & 20-Second Ads?

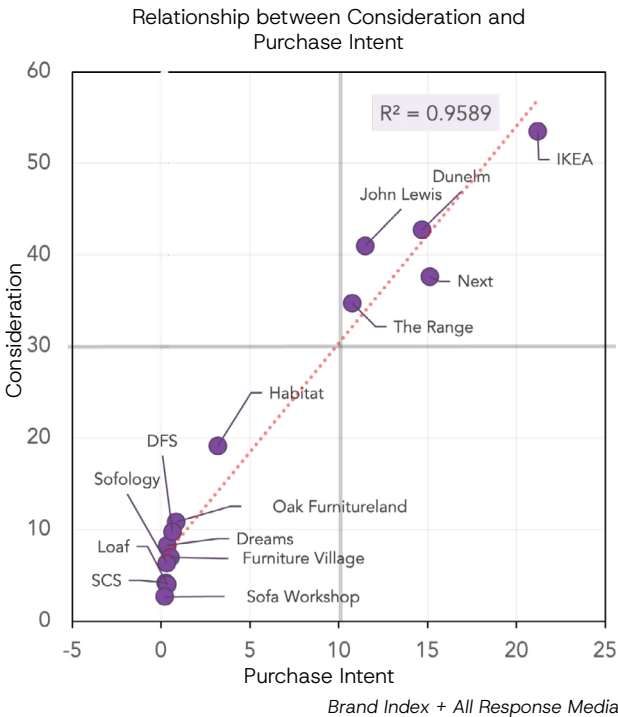
Great for Promotions & Seasonal Offers
Quick, attention-grabbing ads for flash sales and limited-time deals.
Brand Awareness Reinforcement
Shorter ads are used to repeat key messages and keep brands top of mind through frequency stacking.

Bottom line: Short, high-impact ads deliver better results than long, costly commercials.

The Link Between Consideration & Purchase Intent: Winning and Struggling Brands in the Furniture Sector

What’s Driving These Trends?

- Marketing Spend Efficiency:**
Brands like IKEA, John Lewis, and Dunelm efficiently allocate budgets across TV, digital, and outdoor, ensuring high engagement.
- Media Strategy Impact:**
TV and outdoor ads appear to be the most effective in increasing brand consideration, while radio and direct mail show weaker results in driving purchase intent.
- Consumer Trust & Brand Loyalty:**
Established brands like IKEA and John Lewis thrive due to strong reputations, while smaller or newer brands struggle to convert interest into action.



The high correlation ($R^2 = 0.9589$) between Consideration and Purchase Intent suggests a fundamental truth in advertising: brands that successfully capture consumer consideration have a much higher likelihood of converting interest into purchases.

Top Performers:

- IKEA and John Lewis lead with strong consumer trust and brand recall, driving high purchase intent.
- The Range, Dunelm, and Next also perform well, indicating effective marketing strategies that successfully convert brand recognition into purchase interest.

Underperformers:

- SCS and Sofology struggle with low consideration (4.2 and 6.3, respectively) and purchase intent (0.2 and 0.3) despite heavy spending on radio and TV.
- Loaf and Dreams also see low purchase intent (0.3) despite their investments in media, suggesting weak brand differentiation or lack of strong consumer loyalty.

Habitat, with a moderate consideration (19.1) but low purchase intent (3.2), seems to have an awareness problem in converting interest into sales.

Furniture Village and Oak Furnitureland, despite moderate investments in TV and digital advertising, show weak purchase intent (0.5 and 0.8), indicating difficulties in translating brand awareness into sales.

DFS, despite a significant total ad spend (£22.4M) and high TV investment (£17.4M), struggles with low purchase intent (0.6), suggesting inefficiencies in its current media mix.

DFS’s current media strategy is failing to drive brand engagement and conversion, as evidenced by its low consideration (9.8) and purchase intent (0.6).

Despite heavy TV spending (£17.4M), the brand is not successfully capturing consumer interest or influencing purchase behaviour. One of the key issues is that web visits do not correlate with media investment, suggesting DFS may be reaching the wrong audience or failing to provide a compelling call-to-action (CTA).

DFS: Heavy TV Investment but Failing to Drive Consideration

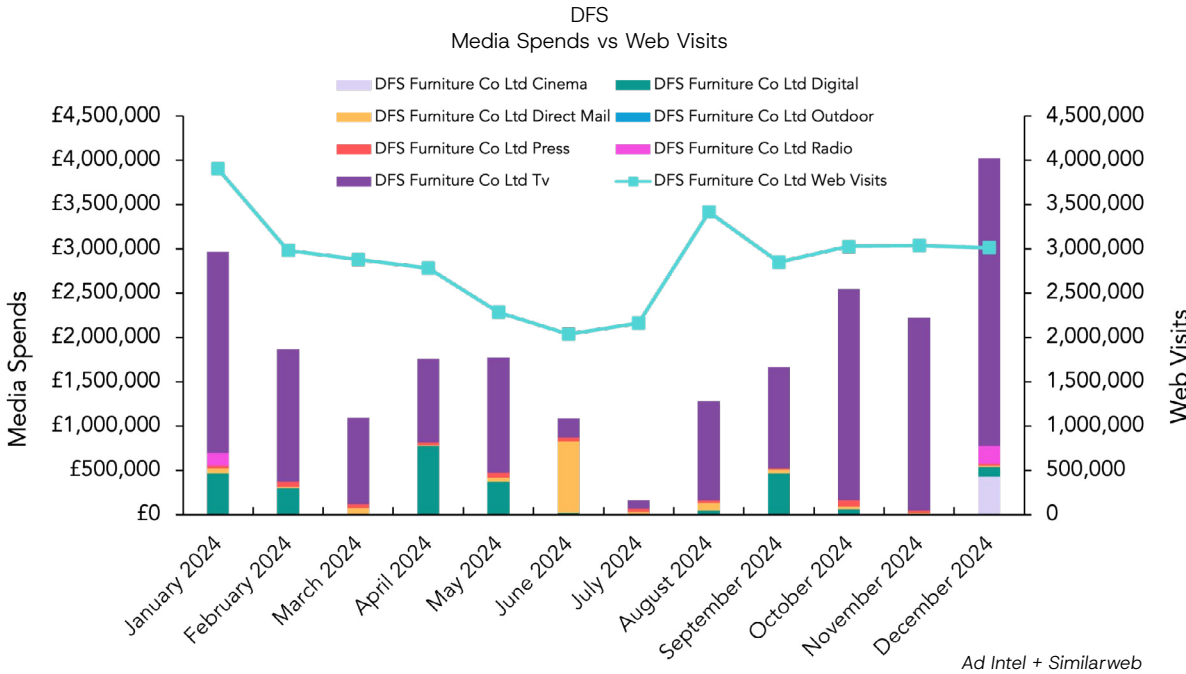
- Total Spend: £22.4M
- Top Channels: TV (£17.4M), Digital (£2.6M), Direct Mail (£1.2M), Press (£443K), Radio (£337K)
- Consideration: 9.8 (Relatively low given its high budget)
- Purchase Intent: 0.6 (Very weak conversion)

The Issue:

- DFS heavily relies on TV (£17.4M), but Consideration (9.8) and Purchase Intent (0.6) remain extremely low. This suggests that its TV messaging is not resonating strongly with consumers.
- Minimal investment in Outdoor (£0), Press (£443K), and Radio (£337K) means DFS is missing key reinforcement channels that could increase engagement and purchase confidence.

Despite a substantial Digital investment (£2.6M), it appears ineffective in improving conversion, possibly due to poor targeting or messaging.

Lesson Learned: DFS must diversify its media mix by investing in Outdoor and refining Digital strategies to create stronger brand engagement. Without multi-touchpoint reinforcement, its TV-heavy strategy will continue to underperform.



DFS's Media Plan is Failing to Reach its Most Important Audience

- 1. The 25-34 and 35-44 age groups, which make up over 42% of DFS's audience, are significantly underrepresented.**

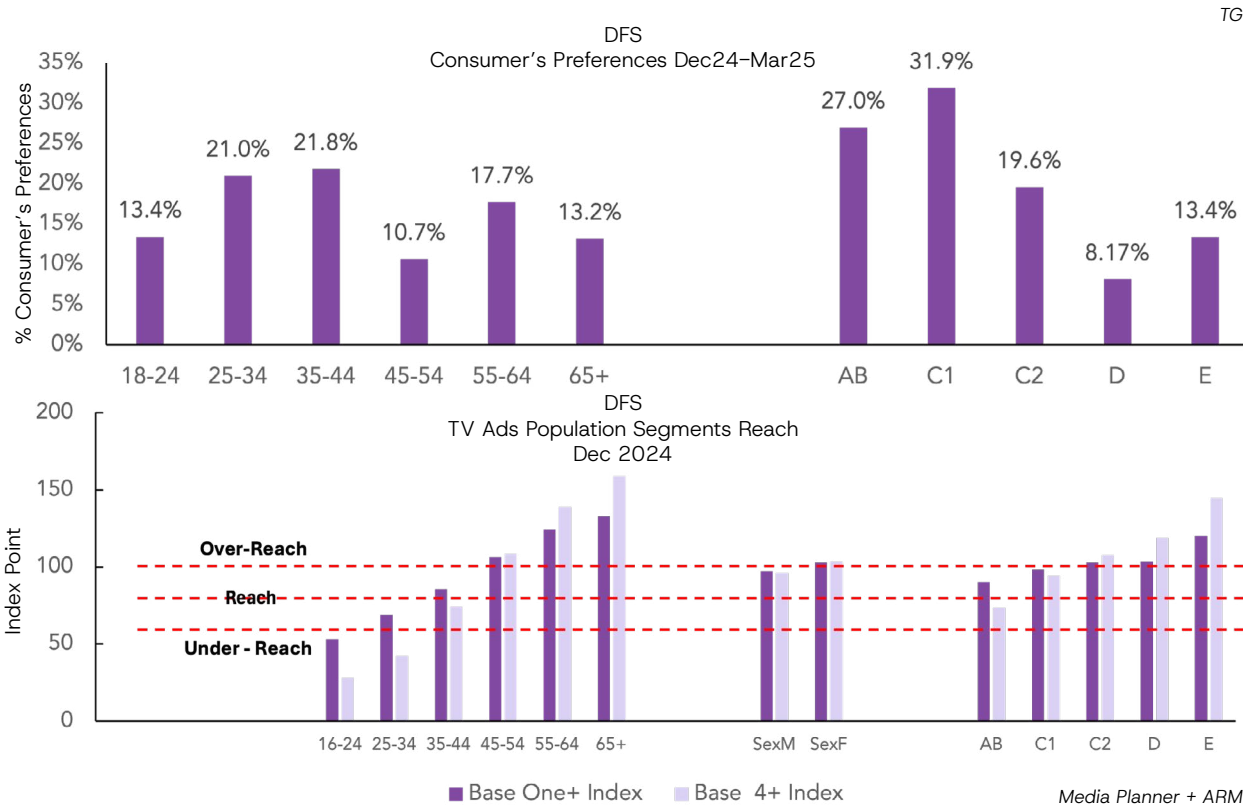
The 25-34 age group has almost zero reach.
The 35-44 age group is below expectations.
DFS's core consumers are NOT being exposed to ads effectively.
- 3. Social Grades AB & C1 are not effectively reached**

AB (27%) is below expected exposure.
C1 (31.9%) is on target but could be optimized.
D & E are overexposed, meaning the campaign might be focusing too much on lower-income audiences.

“ DFS's media plan is currently misaligned with its target audience. The most important DFS consumers (25-44, AB) are being underexposed. Older and lower-income audiences are overrepresented in reach. ”

2. Older Audiences (55+) are Overexposed

65+ is 127.70 index (too high).
55-64 is 108.30 index.
This suggests DFS ads are airing in time slots or platforms that cater to an older audience.
This is wasted spending if the goal is to reach younger buyers.



SCS: A Media Strategy in Need of Optimisation

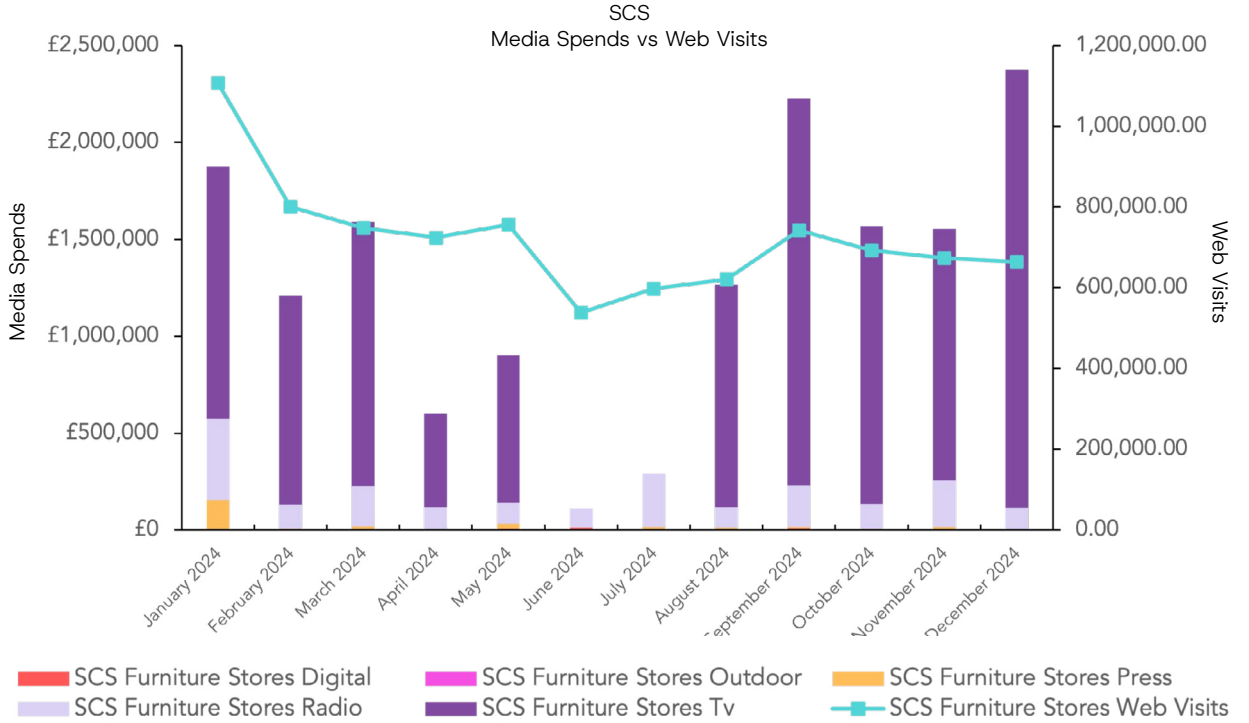
How Reducing Over-Reliance on TV & Radio and Strengthening Digital, Outdoor, and Creative Execution Can Drive Better Results

Why SCS is Struggling with Consideration, Purchase Intent and Web Visits – Summary

- Over-Reliance on TV & Radio** – With 98% of the budget allocated to TV (£13.1M) and Radio (£2.1M), SCS lacks the supporting digital and outdoor presence needed to drive engagement and conversions. Competitors who integrate Outdoor and Digital strategies see significantly better performance.

Weak Call-to-Action (CTA) & Messaging – SCS's TV ads lack emotional engagement and differentiation, failing to motivate consumers to act. Without a compelling CTA, brand awareness doesn't translate into web traffic or in-store visits, leaving purchase intent critically low.
- Creative Ads Lack Impact** – While SCS ads mention the brand frequently (4.5) and have clear messaging (4.3), they fail to stand out emotionally (3.5) and lack distinctive audio (3.2). The ads are forgettable, missing key elements that drive brand recall and differentiation, which reduces their effectiveness in building consideration and purchase intent.

Media Spend Does Not Correlate with Web Visits – Despite high spending on TV and Radio, web visits remain inconsistent and do not show spikes aligned with media investments. This means that SCS's ads are not driving online engagement, likely due to:



Ad Intel + Similarweb

SCS TV Ad Analysis: Why Its Creative Strategy Is Failing to Drive Consideration & Purchase Intent

The Creative Problem: Ads That Fail to Stand Out:

Despite scoring well in brand name frequency (4.5) and offer clarity (4.5), SCS’s TV ads lack distinctiveness and emotional connection—two critical elements that drive consumer action.

- Use of Talent (3.5) & Emotional Impact (3.5): The ad fails to use engaging personalities or compelling narratives that resonate with consumers.
- Use of Distinctive Audio (3.2): The brand does not have a memorable sonic identity, making its ads less recognisable over time.
- Memorability (3.8): Without a strong hook or creative differentiator, the ad is easily forgotten—a major reason why purchase intent remains nearly non-existent.

ARM Reels Ad Score (SCS Winter Sales 2024)	
Criteria	SCS TV Ad
Clarity of Brand Assets	4.2
Frequency of Brand Name	4.5
Use of Talent	3.5
Clear Voiceover (VO)	4
Clarity of Proposition	4.3
Use of Distinctive Audio	3.2
Offer	4.5
Call to Action (CTA)	4
Memorability	3.8
Emotional Impact	3.5

ARM

Call to Action (CTA) & Brand Assets Aren’t Driving Action:

- While the CTA score (4.0) is decent, it lacks urgency or strong motivation for consumers to take the next step.
- Brand Assets (4.2) and Clarity of Proposition (4.3) are not enough—consumers recognise the brand, but they aren’t given a compelling reason to engage further.

What SCS Needs to Do:

- Revamp its creative approach to focus on emotional storytelling rather than just promotions.
- Develop a stronger sonic identity with distinctive, memorable audio elements.
- Introduce urgency in the CTA by emphasising limited-time offers or exclusive in-store experiences.

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Struggling Brands: The Low Consideration & Purchase Intent Group

Loaf: Niche Brand Struggling to Gain Traction

Total Spend: £3.7M
Top Channels: Direct Mail (£780K), Outdoor (£1M), Press (£736K), Cinema (£134K)
Consideration: 0.3 (Low)
Purchase Intent: 4.0 (Among the lowest)

The Issue: Loaf has a highly targeted advertising strategy, focusing heavily on Direct Mail and Press, but its low Consideration score (0.3) suggests it lacks widespread brand awareness.

Minimal investment in TV (£658K) and Digital (£395K) limits visibility in high-impact channels, making it difficult for Loaf to be a top-of-mind choice for consumers.

Outdoor (£1M) investment could have been a strong driver, but without supporting TV or Digital campaigns, visibility is restricted.

Lesson Learned: Loaf needs to amplify its presence by incorporating TV and Digital into its media mix. While Press and Direct Mail support targeted engagement, broader channels are critical to driving Consideration and Purchase Intent.

Oak Furnitureland: Balanced Investment, But Struggling to Convert

Total Spend: £19.5M
Top Channels: TV (£9.1M), Radio (£6.4M), Digital (£3.9M)
Consideration: 10.8 (Moderate but needs improvement)
Purchase Intent: 0.8 (Weak conversion rate)

The Issue: Oak Furnitureland has a balanced media investment, but low Purchase Intent (0.8) compared to Consideration (10.8) suggests a weak transition from awareness to action.

TV (£9.1M) and Radio (£6.4M) investment create strong reach, but lack of Outdoor and Press presence means the brand is missing key reinforcement opportunities.

Digital (£3.9M) spend is substantial but may not be optimised effectively, as engagement remains weak.

Lesson Learned: Oak Furnitureland must refine its media mix by increasing Outdoor and Press investment to reinforce brand awareness and drive conversion. Additionally, reassessing Digital targeting strategies could help increase Purchase Intent.

SCS: A High-Spend Brand with Low Impact

Total Spend: £15.5M
Top Channels: TV (£13.1M), Radio (£2.1M), Press (£258K), Outdoor (£1.8K)
Consideration: 0.2 (Lowest in the category)
Purchase Intent: 4.2 (Among the lowest)

The Issue: Despite massive investment in TV (£13.1M), SCS fails to generate consumer engagement. Its Consideration score (0.2) suggests that the audience does not strongly associate SCS with their purchase decisions.

Minimal investment in Digital (£34K), Press (£258K),

and Outdoor (£1.8K) means SCS is overly reliant on TV, limiting its ability to build a long-term connection with consumers.

Radio (£2.1M) investment suggests an attempt to reinforce messaging, but without an integrated strategy with Digital or Outdoor, the brand is missing key engagement opportunities.

Lesson Learned: SCS needs to diversify its media mix and increase brand presence across Digital, Outdoor, and Press to reinforce TV messaging and enhance Consideration and Purchase Intent. Without these adjustments, TV alone will continue to yield poor results.

DFS: Heavy TV Investment but Failing to Drive Consideration

Total Spend: £22.4M
Top Channels: TV (£17.4M), Digital (£2.6M), Direct Mail (£1.2M), Press (£443K), Radio (£337K)
Consideration: 9.8 (Relatively low given its high budget)
Purchase Intent: 0.6 (Very weak conversion)

The Issue: DFS heavily relies on TV (£17.4M), but Consideration (9.8) and Purchase Intent (0.6) remain extremely low. This suggests that its TV messaging is not resonating strongly with consumers.

Minimal investment in Outdoor (£0), Press (£443K), and Radio (£337K) means DFS is missing key reinforcement channels that could increase engagement and purchase confidence.

Despite a substantial Digital investment (£2.6M), it appears ineffective in improving conversion, possibly due to poor targeting or messaging.

Lesson Learned: DFS must diversify its media mix by investing in Outdoor and refining Digital strategies to create stronger brand engagement. Without multi-touchpoint reinforcement, its TV-heavy strategy will continue to underperform.

Furniture Village: Moderate Spend, Weak Engagement & Conversion

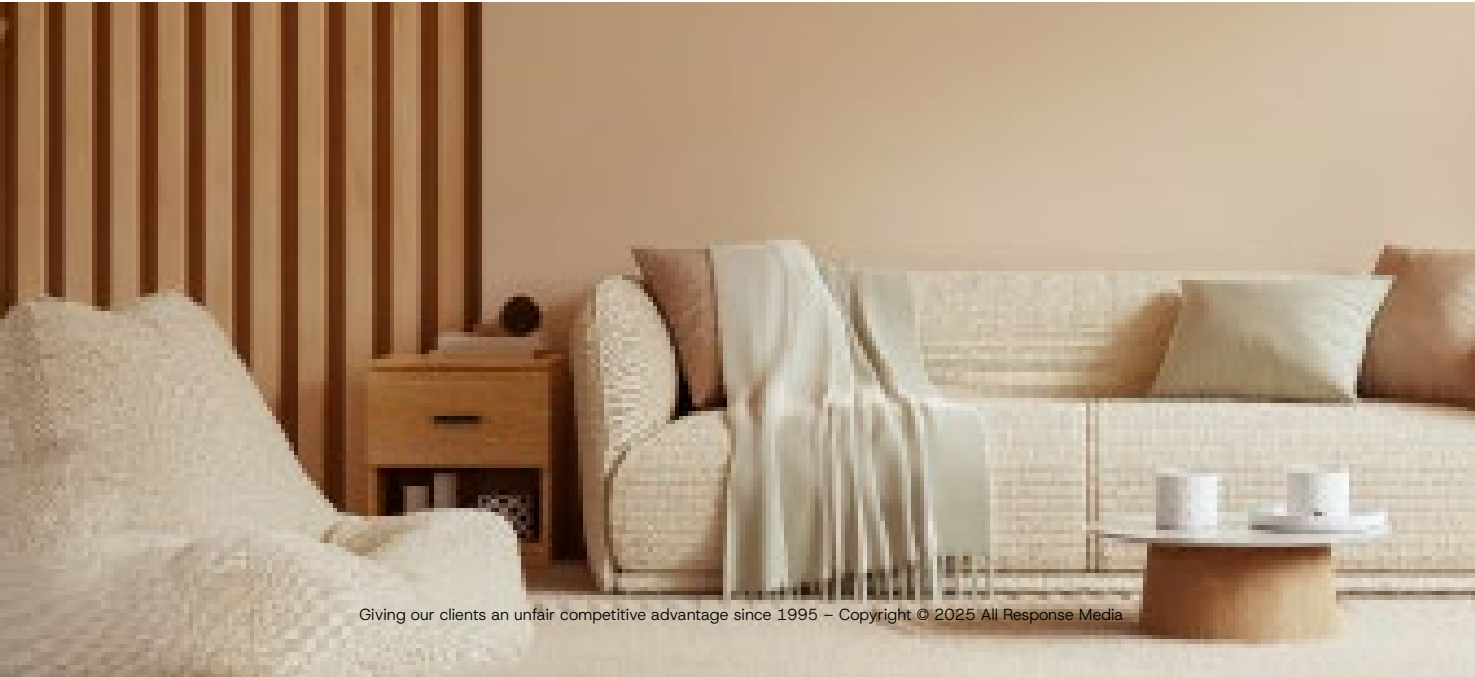
Total Spend: £14.5M
Top Channels: TV (£11.2M), Digital (£1.3M), Direct Mail (£795K), Radio (£1M)
Consideration: 7.0 (Low)
Purchase Intent: 0.5 (Among the lowest conversion rates)

The Issue: Despite investing heavily in TV (£11.2M), Furniture Village struggles to build consumer engagement, as reflected in its low Consideration (7.0) and Purchase Intent (0.5).

Very low Outdoor (£8.7K) and Press (£39K) investment limits brand reinforcement, making it harder to stay top-of-mind for consumers.

Direct Mail (£795K) and Digital (£1.3M) investments seem to be underperforming, possibly due to weak targeting or an ineffective call-to-action.

Lesson Learned: Furniture Village must increase Outdoor and Press investment to create a stronger visual presence, complementing its TV campaigns. Additionally, refining Digital targeting strategies could significantly boost engagement and purchase conversion.



Bridging the Gap: How Consideration Drives Purchase Intent in the Market

A strong correlation ($R^2 = 0.7114$) between Consideration and Purchase Intent highlights a key insight in advertising: brands that effectively capture consumer interest are far more likely to convert that interest into actual purchases. Understanding the right media mix and engagement strategies is crucial for maximizing this potential.

Sector Weight & Performance Differences

The furniture sector generally has higher consideration and purchase intent scores compared to the fitting sector (bathrooms, kitchens, and tiling). This is largely due to the higher emotional engagement, brand loyalty, and in-store experience associated with furniture shopping. Consumers typically invest more time in researching and comparing furniture brands, leading to higher overall scores for consideration and purchase intent.

Conversely, the fitting sector (bathrooms, kitchens, tiling, and plumbing) often sees lower scores because:

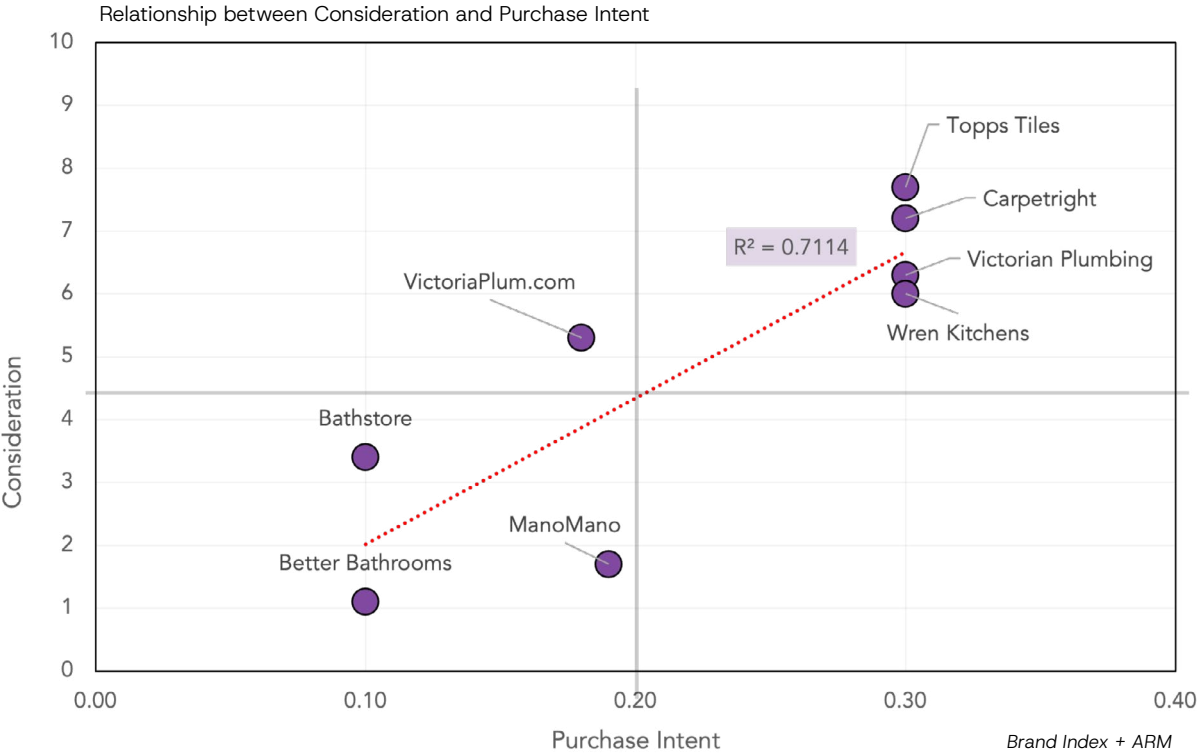
Purchases are often functionality-driven rather than emotionally driven.

Brand loyalty is weaker, as consumers focus on pricing and availability over long-term relationships

The purchase cycle is often led by contractors and trade professionals, reducing direct consumer-brand engagement.

Marketing spend in this sector is generally lower than in furniture, limiting brand exposure.

Despite the sector-wide differences, both industries can still be divided into top performers and underperformers based on relative performance within their own category.



Why Stimulating Web Visits is Crucial for the Fittings Sector

Unlike the furniture sector, which benefits from showroom experiences and emotional purchasing, the fitting sector (bathrooms, kitchens, tiling, plumbing) is more functional and research-driven. Consumers spend more time comparing products online, checking specifications, reading reviews, and looking for installation options before making a decision.

How Web Visits Drive Awareness, Consideration, and Purchase Intent

Awareness – More web visits indicate higher brand visibility, meaning customers are actively engaging with the brand.

Consideration – Consumers researching brands online signal strong interest. The higher the web visits, the greater the opportunity to nurture leads through remarketing and targeted ads.

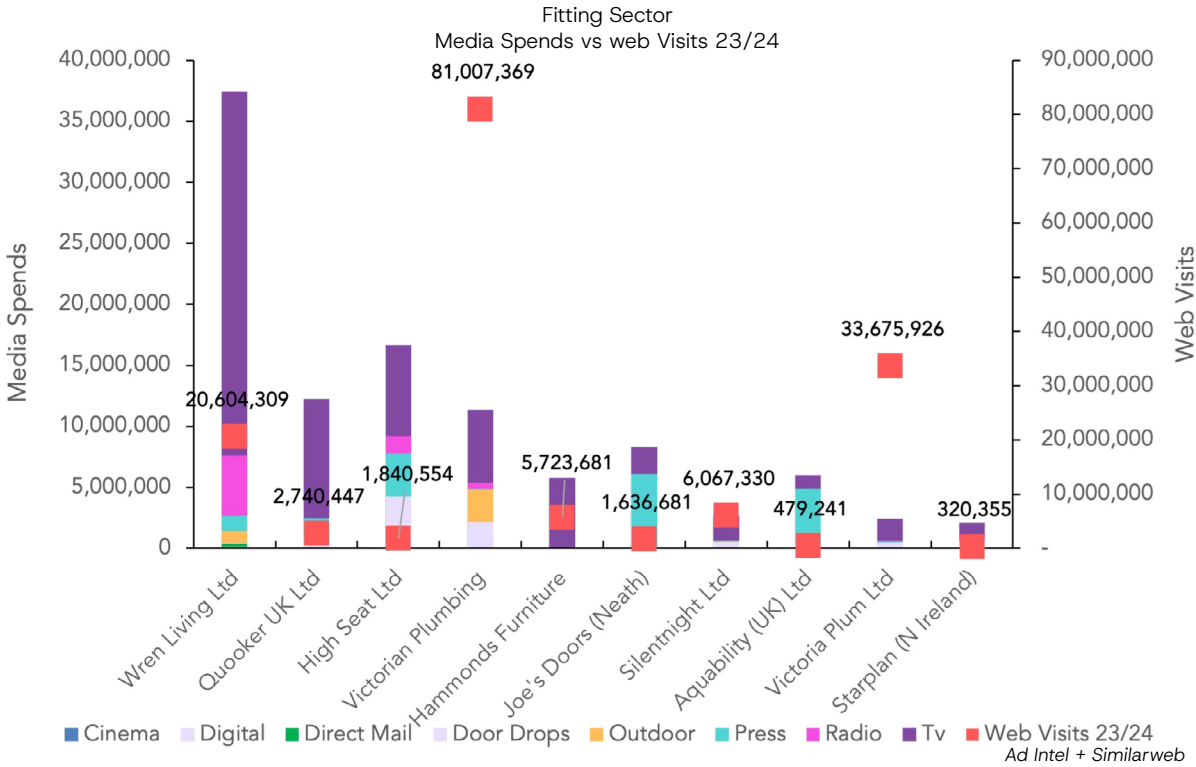
Purchase Intent – More website traffic means more opportunities to convert visitors into buyers, through product comparisons, online promotions, and checkout optimisations.

The Winning Formula for the Fitting Sector

Strong Digital Presence → Victorian Plumbing’s success proves that digital investment directly boosts web visits.

Balanced Media Mix → Wren Living shows that TV, radio, and outdoor reinforcement enhance consideration.

Press Alone Doesn’t Work → Joe’s Doors and Equability’s heavy press spend with low web traffic proves that print media alone doesn’t drive engagement.



Bridging the Gap: Strengthening Digital Engagement to Sustain Web Traffic for High Seat Ltd

The decline in web visits since February 2024 can be attributed to an over-reliance on traditional media, insufficient digital reinforcement, and ineffective retargeting. While TV, press, and door drops generate awareness, the lack of strong digital integration means potential customers are not being nurtured beyond their initial interest. Without effective retargeting strategies and compelling calls to action, visitors may engage once but fail to convert or return.

Additionally, the current focus on older demographics, who are less active online, limits digital growth, while younger, digitally savvy consumers remain under-targeted. To reverse this trend, High Seat Ltd must strengthen its digital presence through search, programmatic retargeting, and mobile-friendly website enhancements, ensuring a seamless transition from offline awareness to online action.

Declining Web Visits – Why is this Happening?

A. Web Traffic Trend
Web visits peaked in February 2024, but since then, there has been a continuous decline.

B. Potential Causes of Decline

Insufficient Digital Support:

- The brand is heavily reliant on traditional media (TV, press, door drops).
- Digital spend is minimal (355K in total spend) and not reinforcing TV campaigns online.

Inefficient Retargeting Strategy:

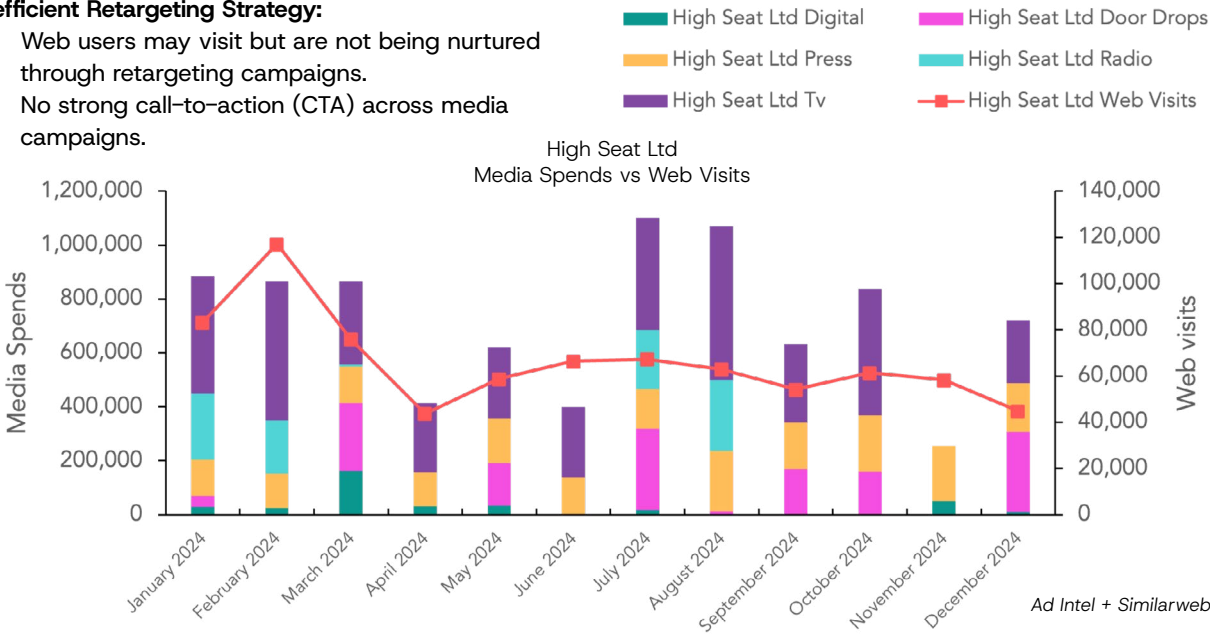
- Web users may visit but are not being nurtured through retargeting campaigns.
- No strong call-to-action (CTA) across media campaigns.

Over-Reliance on Older Demographics:

- Older customers (55-64, 65+) may not be heavy online shoppers.
- Younger demographics (25-44) are more digital-first but not effectively reached.

Solution:

- Enhance digital media efforts (Search + Programmatic Retargeting).
- Introduce strong promotional offers online (e.g., limited-time discounts, exclusive online deals).
- Improve website engagement via UX/UI changes (fast load speeds, mobile-friendly design).



Key Missed Opportunities: The 25-34 and 35-44 Segments

The 25-44 age group is not being effectively targeted despite its strong potential for furniture purchases.

A. Current Purchase Data for Lounge/Living Room Furniture

- 25-34: 16.2% of total purchases → Represents an active furniture-buying demographic.
- 35-44: 14.8% → A key demographic with potential to spend more over time.

Over-Reaching: The Risks of Over-Focusing on 55-64, 65+, and Segment E

High Seat Ltd is over-targeting older demographics (55-64 and 65+) and low-income groups (Segment E).

A. Over-Concentration on 55-64 and 65+

These segments dominate TV reach (134.7 & 180.1 index). However, younger high-spending customers (35-54) are not well-covered.

Problem:

- Misses the opportunity to acquire younger lifelong customers.
- Risk of stagnation—if the company relies too much on aging consumers, future revenue growth will slow down.
- Over-saturation of this audience leads to diminishing returns on TV spend.

B. Over-Exposure to Segment E (Low-Income Consumers)

Segment E represents only 9.23% of furniture purchases. However, TV Reach over-indexes heavily for low-income consumers (Index 164.6).

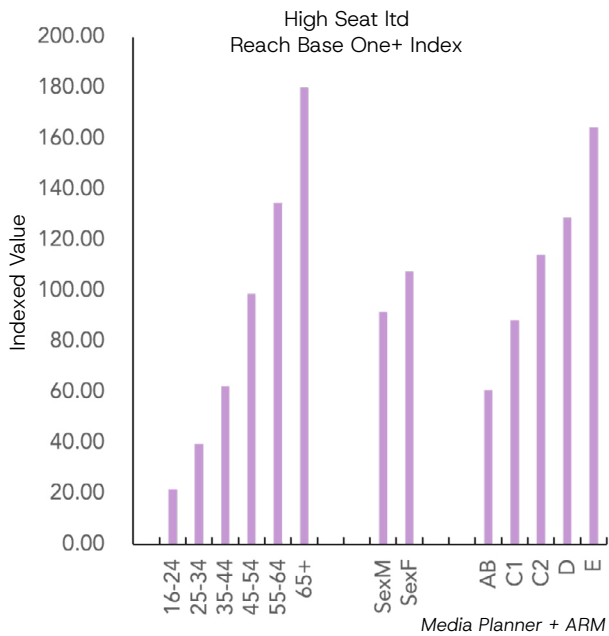
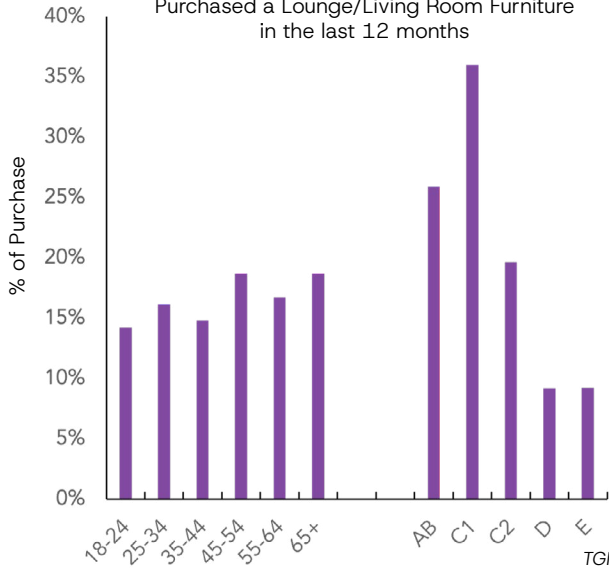
Inflation impact:

- Low-income consumers are more affected by inflation and reduced purchasing power.
- High Seat Ltd may be wasting budget on a segment that cannot afford premium furniture.

Opportunity:

The 25-44 group is highly engaged but under-targeted in media reach:

- TV Reach for 25-34 is only 39.6 (low).
- TV Reach for 35-44 is 62.3 (still weak).
- Digital strategies (search, retargeting, social media) are underutilised.



Rebalancing High Seat Ltd.'s Media Plan Without Losing Direct Response Efficiency

High Seat Ltd.'s current media plan is heavily weighted toward older demographics (55–64 and 65+) and lower-income consumers (Segment E), which creates long-term risks. While this approach generates immediate conversions through direct response tactics, it over-reaches certain segments while under-

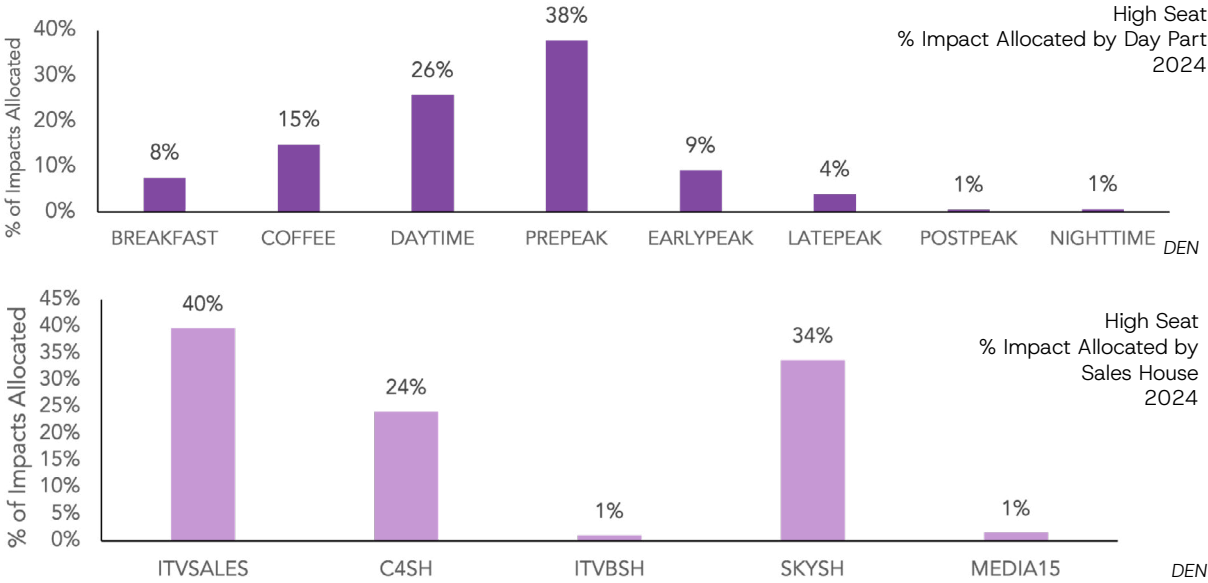
leveraging younger, high-value customers (25–44 AB/C1). This imbalance could result in diminishing returns over time, as younger demographics are not being nurtured into future loyal customers, and lower-income segments are less likely to sustain demand due to inflationary pressures.

Rebalancing Sales House and Day part Investment

Currently, ITVSALES dominates media investment, overexposing the brand to mass-market and lower-income viewers. While this ensures broad reach, it fails to maximise engagement among wealthier consumers (AB/C1), who are more likely to watch premium content on SkySH and C4SH. To optimise performance while maintaining direct response efficiency, the brand should reduce ITVSALES exposure and shift more investment into SkySH and C4SH, which attract a more affluent audience. Increasing SkySH's share would improve engagement with high-income AB/C1 viewers, while refining the allocation in C4SH would help capture younger, high-value consumers who consume both digital and linear content on Channel 4

rebalancing, as Pre-Peak and Daytime currently dominate spending, leading to overexposure among older and lower-income audiences. Meanwhile, Late Peak and Post Peak, which are more effective in reaching younger, affluent demographics, remain underutilised, and low-impact slots like Night-time still receive unnecessary budget. A more strategic approach would involve reducing Pre-Peak investment while keeping placements in the highest-converting slots for direct response. Some Daytime spend should be reallocated to later dayparts to engage a younger, more purchase-ready audience. Late Peak investment should increase to reach 25–44 AB/C1 consumers, who are more likely to make high-value furniture purchases, while Post Peak should also be strengthened to capture premium audiences during high-engagement entertainment and news content.

The daypart investment strategy also needs



Quooker UK: Critical Gaps in Media Strategy & Recommendations for Optimisation

Why Are Web Visits Declining Despite High TV & Press Spend?

Since January 2024, Quooker's web traffic has dropped without signs of recovery. This suggests that the current TV and Press strategy is not effectively driving online engagement. Here's why:

Lack of Digital Integration to Reinforce TV & Press Exposure

- TV & Press create consideration, but Quooker is not capitalising on that awareness to drive online action.
- No significant digital investment means consumers see ads but have no immediate digital follow-up, leading to low conversion rates.

Press Investment is Not Translating to Online Behavior

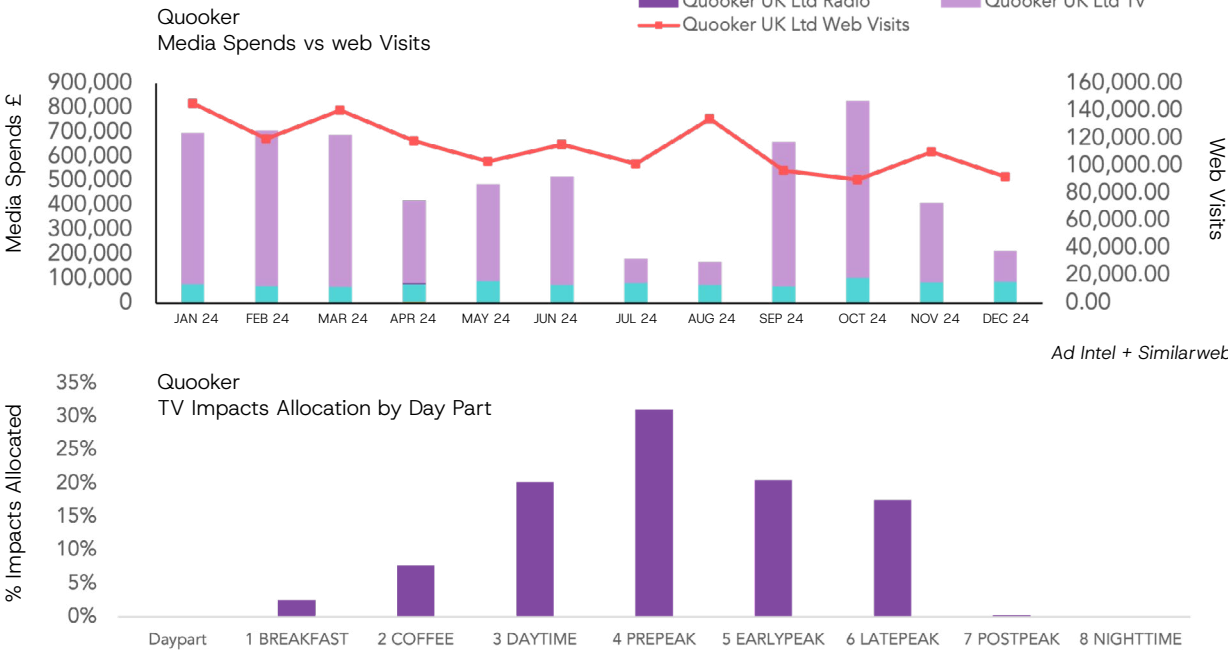
- £953K in press ads has little correlation with digital behaviour—press is good for credibility, but without a strong call-to-action (CTA) or digital reinforcement, it does not drive immediate consumer action.

TV & Press Alone Cannot Sustain Web Engagement Without Digital Support

- Consumers today expect seamless cross-channel engagement.
- Quooker is missing the opportunity to retarget TV & Press audiences with digital ads and Outdoor

TV Spot Allocation Not Driving Web Engagement

- Too much budget is allocated to Prepeak (31%) and Early Peak (20.5%), rather than Late Peak (17.5%) and Daytime (20.2%), which could deliver stronger engagement for the product category.



Quooker’s Missed Opportunity: Failing to Engage High-Value Buyers & Future Homeowners

Quooker is missing crucial target audiences due to significant gaps in its media strategy, particularly in its approach to demographic segmentation and media channel allocation. The brand’s current focus

leans heavily toward older consumers, particularly those aged 55+, while underinvesting in younger, high-intent audiences who are actively making home improvement decisions.

The 25–34 and 35–44 age groups together account for 23% of all water filtration system purchases in the last 12 months, yet Quooker’s media plan does not sufficiently engage them. These age groups represent a large proportion of new homeowners, a demographic that is particularly receptive to kitchen upgrades and premium home solutions like Quooker’s boiling water taps. However, by prioritizing older segments through press and linear TV, rather than leveraging digital channels where younger homeowners actively seek inspiration and product information, Quooker is failing to capitalize on this crucial consumer base. Furthermore, the brand is not effectively reaching the AB and C1 socio-economic groups, who collectively make up the largest proportion of water filtration system buyers, yet receive insufficient targeted

messaging within Quooker’s current media mix. This is especially problematic given that these groups have the disposable income and interest in premium home solutions, making them ideal Quooker customers. The over-reliance on Channel 4 (66.5% of TV impact allocation) further contributes to this disconnect. While C4 has a broad reach, it does not align as well with Quooker’s premium, affluent target audience as ITV or SkySH would. By limiting exposure on these higher-converting TV channels, Quooker is missing an opportunity to engage consumers who are both willing and able to invest in its product. This misalignment between media spend and target audience behavior is a major reason why, despite Quooker’s heavy investment in TV and Press, web visits have been on a steady decline with no signs of recovery.

