



Final Report

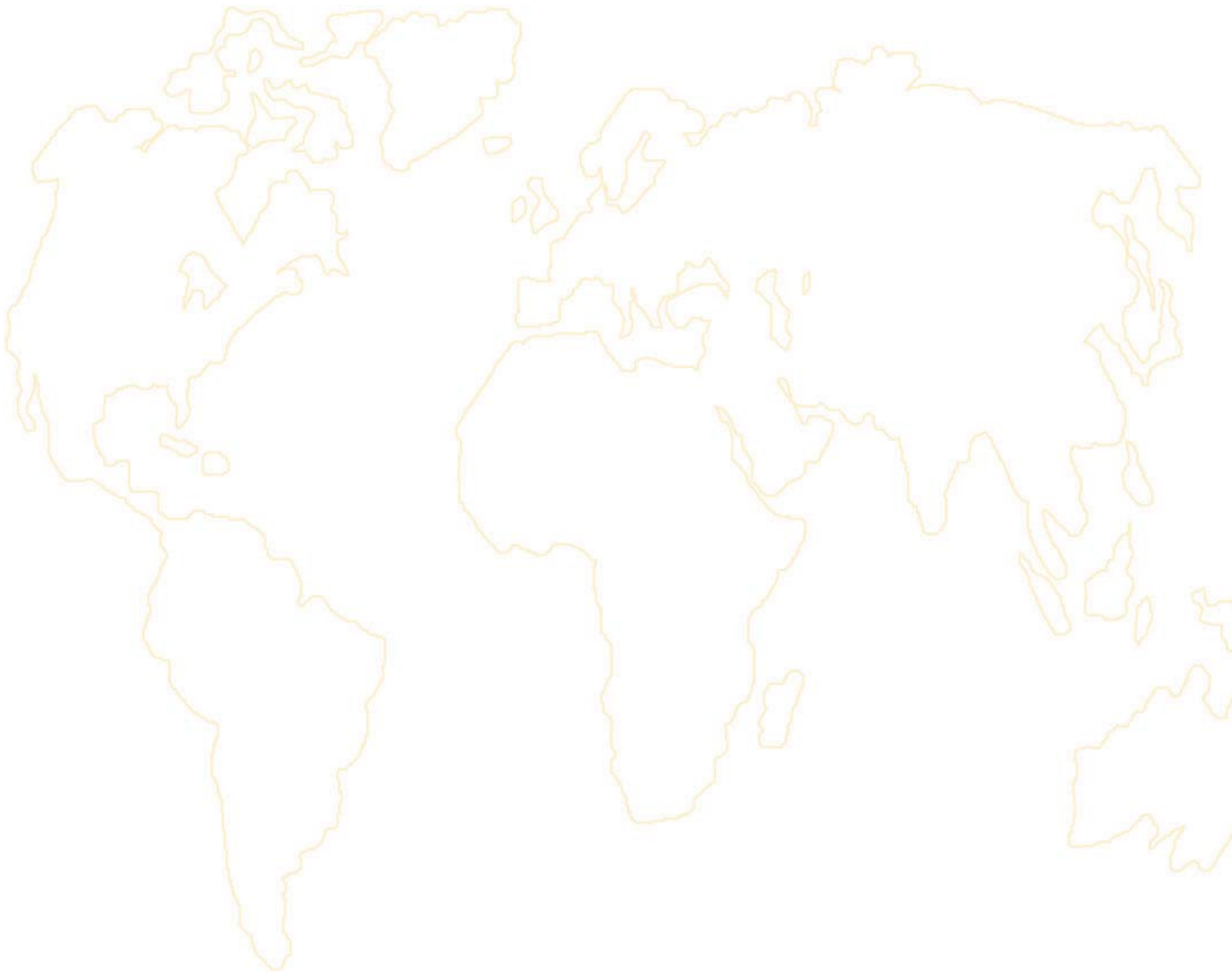
The Furniture Manufacturing Industry of Barbados (2)

Marketing Strategy for Barbadian Vernacular Furniture



Freiburg/Germany and Bridgetown/Barbados, February 2007





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1 INTRODUCTION

The furniture industry of Barbados experiences a serious crisis. With a virtual absence of any raw material for furniture on the island and increasing competition from cheap South-Asian imports, the sector has been in decline for more than a decade now.

A program to revive the former strength of the sector has been presented in part 1 of the study. The focus of the present part 2 of the study is on “Barbadian Vernacular” furniture, one of the niche products identified in the first study as having a huge, yet untapped potential for Barbados.

A major asset of the Barbadian economy and its manufacturing sector lies in the cultural heritage of the country. The international appreciation for Barbadian vernacular furniture is well reflected in publications like Michael Connors’ “Caribbean Elegance”. In this coffee table book, the famous West Indian decorative arts scholar presents a comprehensive guide to the development of West Indian furniture and its makers during the colonial era. Detailing the historical and sociological influences at play, he shows how each of the Caribbean island’s furniture began by reflecting the styles of the various ruling countries (England, Holland, Spain, Denmark, or France) and later evolved into a uniquely Caribbean style as the islands’ furniture makers. They were primarily copying European colonial styles and began to develop their skills and incorporate African decorative motifs into their designs. Use of the islands’ hardwoods, such as mahogany, and the prevalence of items best suited to the climate, such as caned rockers, four-poster beds, and armoires, further defined the style.

Building on this indisputable yet neglected potential, the Honorable Mia Mottley, Minister of Economic Affairs and Development of Barbados, has initiated a program to brand and market “Barbadian Vernacular” furniture. Branding here refers to the set of intangible values of the product that is to be reassured to the customers by some type of a badge. A brand is an important vehicle for communication and promotion. Benefits of branding include that it aids recognition and increases goodwill value. It repels competition, facilitates customer recall and self selection, and allow a higher price to be charged. It also can also be a means of obtaining legal protection for product features, although the details of such legal arrangements yet have to be clarified. From a marketing point of view, branding has a number of additional benefits: It facilitates market segmentation, improves customer loyalty and aids positioning of the product in contested markets.

The envisaged marketing scheme of Barbadian vernacular furniture will draw on 5-6 models of standard traditional furniture that yet need to be defined. A “Historical Committee” convened by the Hon. Minister has been mandated to supervise this selection, seeking the inputs of craftsmen and a researcher who did her Master thesis on traditional Barbadian furniture.

The present study provides suggestions and hints for the marketing of “Barbadian Vernacular” furniture both on the domestic and the international market.

2 EXECUTIVE SUMMARY AND SUGGESTED ACTION

2.1 Scope of the study

Conventional furniture manufactured in Barbados is facing increasing competition by cheaper imports from South-East Asia, South America, North America and other Caribbean countries. In contrast, authentic traditional furniture (antic reproduction furniture) has a high potential for Barbadian manufacturers. It can be turned into a unique sales proposition that gives the sector the edge over competitors in the region.

The current study outlines a marketing program for vernacular furniture and hints at promising furniture designs/models that have the potential for this program.

To support this process, the current study is:

- to take up the working results of the historical commissions
- to assess national, regional and selected US-markets for “Vernacular Furniture”
- to clarify the scope and mode of operation for a branding of “Barbadian Vernacular Furniture”
- to assess the productive capacity of existing companies and to formulate needs for its upgrading
- to identify needs for trainings of craftsmen and artists to produce “Barbadian Vernacular” furniture
- to draft a marketing scheme for “Barbadian Vernacular Furniture” in various markets (national, regional, overseas)

2.2 Activities under this consultancy

The topics listed above have been addressed during a two-week mission to Barbados in January 2007.

Key to the development of a model for the promotion of “Barbadian Vernacular” is the selection of styles and models of furniture by the “Historical Committee”. It was not possible to meet the chairman of the “Historical Committee” during the consultant’s stay in Barbados to learn about its recent working results. The action plans for the “Barbadian Vernacular” initiative therefore had to be drawn up independently of the hitherto existing working results of the Committee.

Together with the BIDC’s Business Development Officer in charge of the furniture sector one carpenter has been visited; this visit of a potential partner for the initiative provides the empirical background for the findings and recommendations of this report. To increase the significance of these findings, cooperation with the target group has to be further intensified. This will also raise the carpenters’ and joiners’ sense of ownership for the “Barbadian Vernacular” initiative!

On the last day of the consultant’s mission, findings of the study and the plan of action drawn from it have been presented and discussed with the management of BIDC and a representative each of the Samuel Jackman Prescod Polytechnic and the Barbados Manufacturers’ Association

2.3 Overview: Five key elements of a strategy to promote “Barbadian Vernacular”

It is suggested to base the promotional strategy for “Barbadian Vernacular” on the five strategic elements listed below. In chapter 2.4 these measures are broken down and made operational in a sequence.

2.3.1 Institutional level

What?: Assist manufacturers in setting up an association

How?: Pool the existing expertise to manufacture “Barbadian Vernacular” in a furniture manufacturers’ association

2.3.2 Prototypes

What?: Select models and produce prototypes

How?:

- Select 3(-5) models of “Barbadian Vernacular” furniture and
- have prototypes of them developed for three different product lines

2.3.3 Capacity building

What?: Assess producers’ capacities in view of manufacturing of “Barbadian Vernacular” and assist them to overcome their deficits

How?:

- Assess their current capacities to produce antique reproduction furniture (based on part 1 “The Furniture Sector”)
- identify deficits (in terms of machinery and skills)
- provide targeted inputs to upgrade current production facilities
- improve training of carpenters/joiners at the Samuel Jackman Prescod Polytechnic

2.3.4 Marketing

What?: E-commerce for a start

How: Start to market “Barbadian Vernacular” furniture through existing (!) e-commerce platforms; this is comparatively cheap and reaches a wide range of potential customers; an e-commerce scheme also provides a convenient opportunity to learn about the customers and their preferences

2.3.5 Scaling up

What?: Stepwise scaling-up

How: Complement the product line in cautious steps as per the productive capacities and the demand

2.4 Suggested action; short-, medium- and long-term

What follows is a summary of the suggested strategy, broken down in short-, medium- and long-term measures (s. chapter 5 for a more detailed description of the respective activities).

2.4.1 Short-term action

Five measures can be implemented immediately to launch the project without further delay.

what?	by whom?
<ul style="list-style-type: none"> Determine which of the carpenters/joiners has the capacity to produce "Barbadian Vernacular" at a competitive level 	BIDC Industrial Services Division
<ul style="list-style-type: none"> Decide whether the production can also be assigned to manufacturers of antique reproduction furniture in neighbouring countries (marketing still to be done by the Barbadian licensors) 	BIDC Industrial Services Division
<ul style="list-style-type: none"> Select three prototypes to be produced in a test series, define basic features of these models in detail and document them in a sourcebook together with photographs. 	Historical Committee
<ul style="list-style-type: none"> Define standards regarding materials (wood species, varnishes and glues, caning material) and techniques to be employed (to make joints, to cane the furniture...) 	Historical Committee
<ul style="list-style-type: none"> Intensify talks with the Curriculum Development Office at the Samuel Jackman Prescod Polytechnic to include "Barbadian Vernacular" as a specialisation in the new curriculum for joiners 	BIDC Industrial Services Division

2.4.2 Medium-term action

By mid-2007 the following activities should be implemented:

what?	by whom?
<ul style="list-style-type: none"> Organise a competition inviting craftsmen to come up with their interpretation of "Barbadian Standards" and select those who will produce these furniture under licence 	Historical Committee assisted by BIDC Design Section
<ul style="list-style-type: none"> Create a logo and a visual identity for "Barbadian Vernacular" (with its three product lines "Antique Reproduction", "Barbadian Standards" and "Bajan Fusion") 	BIDC Design Section (possibly assisted by a PR agency)
<ul style="list-style-type: none"> Carry out a detailed assessment of the machinery at the Polytechnic's workshop and draft a plan for its upgrade (including additional staff / resource persons) 	BIDC Industrial Services Division and Polytechnic
<ul style="list-style-type: none"> Facilitate the setting up a furniture producers' association and develop its institutional capacities so that it can manage / coordinate "Barbadian Vernacular" marketing campaign 	BIDC Industrial Services Division

2.4.3 Long-term

In addition, and with a longer-term (i.e. by the end of 2007) perspective the following activities are suggested:

what?	by whom?
<ul style="list-style-type: none"> Organise a second competition asking craftsmen to present their suggestions for “Bajan Fusion” pieces 	Historical Committee with BIDC Designers
<ul style="list-style-type: none"> Start producing “Barbadian Vernacular” on a test scale and market it through an existing(!) e-trading platform; then scale up the production and trade as per the demand of the market 	Furniture producers (with assistance of BIDC)
<ul style="list-style-type: none"> Transfer full responsibility for the marketing of the furniture to an association of furniture producers (or by an agency hired by them). This is to increase/secure ownership for the “Barbadian Vernacular” label, responsibility. 	BIDC+furniture producers

2.5 Open questions and critical success factors

- Role of the Historical Committee**
 The role of the Historical Committee is to be clarified: does it have an advisory function only (providing expertise on historical aspects) or does it have the mandate to take strategic decisions (selecting partner among the joiners and carpenters, defining standards for the “Barbadian Vernacular” furniture production, defining target markets...)
- Sufficient capacities in Barbados?:** Do Barbadian manufacturers indeed have the capacity to produce “Barbadian Vernacular” furniture in a competitive manner and at an industrial scale? No doubt: individual joiners have the required knowledge, but does their number constitutes a critical mass to embark on a “Barbadian Vernacular” campaign or which the entire production will be based in Barbados?
- “Barbadian Vernacular” to be produced in Trinidad&Tobago and St. Vincent?:** It is not so far off to have “Barbadian Vernacular” produced by craftsmen of other countries in the region (under Barbardian licence); an understanding has not yet been reached regarding this fundamental issue.
- “Barbadian Vernacular” - a government programme?:** For the campaign to become sustainable, ownership will have to be transferred from government agencies to the private sector. The earlier in the process this is done, the stronger the sense of ownership will be. It yet remains to be seen who assumes this responsibility. It is strongly recommended that BIDC facilitates the formation of a furniture manufacturers’ association and. Alternatively, an individual company suggesting itself to play a lead role should be identified and promoted with technical and financial support.

3 CURRENT PRODUCTION AND MARKETING OF BARBADIAN VERNACULAR FURNITURE

3.1 Current productive capacity of local companies

3.1.1 Quality

So far no authoritative quality standards and quality control mechanisms are in place. The promotion of “Barbadian Vernacular” furniture is an opportunity to set up such a system in the sub-sector, thus creating a precedent that could become the starting point for a wider quality initiative for Barbadian manufacturers.

3.1.2 Process

The number of craftsmen still producing vernacular furniture in Barbados is estimated to be low. There are possibly as few as five joiners in Barbados still practicing this traditional craft. Their production methods and technologies are often old-fashioned. While this is not a general obstacle to producing traditional furniture, it needs to be assessed how these companies can be assisted to upgrade their means of production so that they can produce bigger volumes at international quality standards. This exercise can significantly draw on the results of part 1 of this survey (“The furniture Sector”).

Claiming that Barbadian Furniture is of the highest technical standards is a preconception that yet has to prove right when having to meet an international demand.

Likewise, process balancing, flow and control, as well as logistics are issues that Barbadian producers so far did not have to overly worry about. For international sales of “Barbadian Vernacular” furniture, export distribution channels have to be set up.

3.1.3 Capacity

Production of traditional furniture has so far been done for the domestic market, only and in (increasingly) modest volumes. No statistics capture this sub-sector.

However, much of the dynamics characterising the sub-sector are those exposed in part 1 of the study. Only one of the companies covered in the study of the furniture sector has put a clear focus on antique reproduction furniture (Dasrat Sugrim).

3.2 Critical success factors

3.2.1 Needs for their technical upgrading

Three areas of Barbados’ furniture manufacturing sector require upgrading:

1. the technical equipment of the companies needs to be upgraded (s. above)
2. cooperation between the companies has to be increased in order to secure the performance and competitiveness of the sector

3. logistics for an export trade is in its infancy;

The upgrading should be done as part of a comprehensive strategy to revive the sector (see part 1), not in isolation.

3.2.2 Specific training needs for craftsmen and artists

Training needs have been addressed in detail in the part 1 of the study and need not be repeated here again. Also refer to chap. 3.2.2

4 RECOMMENDATION: MARKETING STRATEGY

4.1 Market environment

4.1.1 Market trends and product specifications in overseas markets

Devising a campaign to promote “Barbadian Vernacular” furniture, one has to understand the market environment in which this activity is embedded. For this purpose, it will be particularly helpful to highlight the key features of the US and EU markets; part 1 of the study (‘Furniture Sector Study’) provides an in-depth analysis of these important market segments.

That analysis shows that the two large scale markets USA and EU are characterised by a vast heterogeneity of consumer preferences within their respective boundaries. Europe’s largest markets for furniture, the UK and Germany vary one from the other as much as the Scandinavian consumer preferences from the ones in the Mediterranean countries. In the U.S. the heterogeneity of preferences is similar, with its East and West coast styles, the almost tropical South-East and the puritan Middle West, to name but a few styles.

Below, major trends and consumer preferences are described. Emphasis is put on niche products and markets, which suit the structure of the Barbadian furniture manufacturing sector and namely “Barbadian Vernacular”, thus avoiding competition with mass products and taking into account the absence of economies of scale in production.

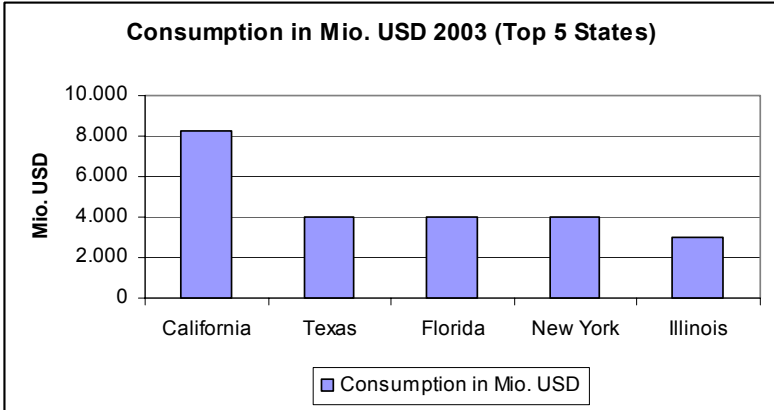
4.1.2 U.S. furniture market

Key features

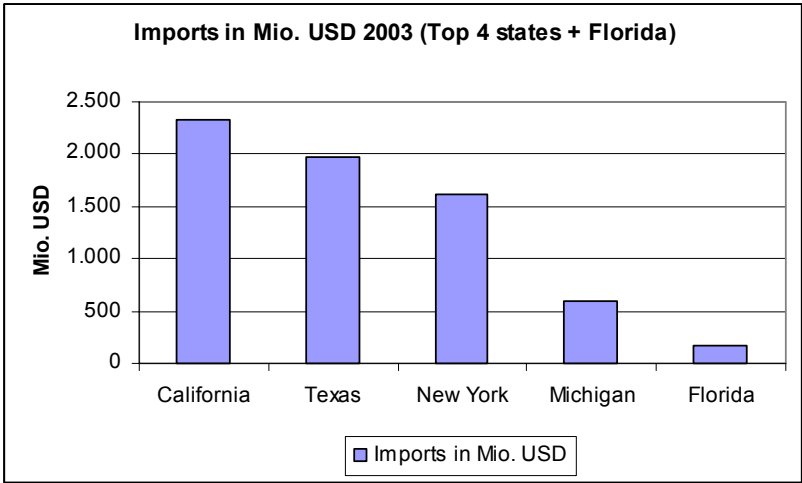
The USA is the largest furniture importer worldwide with an annual import value of almost USD 20bn (increase by around 50% since 1999) and an annual consumption of almost USD 90bn (increase by almost 5% since 1999). Main exporters to the U.S. are China (33% of import values), Canada (18%), Italy (11%) and Mexico (7%). Country-wide, an increasing volume of low-cost furniture is sold, originating from Asian and Latin American countries. A relatively large share (15%) of overall imports is claimed by parts for furniture and seats. This signifies the growing trend by furniture manufacturers to outsource some of their manufacturing activities. The national manufacturing sector is currently experiencing strong competition. Many manufacturers in the US are currently producing below their capacities.

As outlined in chapter 3 of part 1 of this report (“The Furniture Sector”), the Barbadian furniture sector will be competitive in niche markets rather than in mass markets to be covered by economies of scale. Design and quality oriented production has to find a match in well selected export markets. In the U.S. market, niche products are experiencing rapid fluctuations. Preferences are changing quickly; there are seasonal changes every year. Especially the large furniture retailing chains function as trend setters for the market.

In terms of volume, the U.S. market’s most important furniture consuming states are: California, Florida, Texas, New York and Illinois, with California consuming twice as much as the second largest consumers (Texas and Florida) (see Graph 1). Most important furniture importing states in the USA are also the large-scale consumers (Graph 2).



Graph 1: Major furniture consuming states in the U.S. 2003 (NAICS 337 data): California is the leading consumer state for furniture in the U.S., followed by Texas and Florida. Florida as potential target market for Barbados offers a purchase volume of approx. USD 4bn annually. Most is spent on dormitories and dining/living room furniture



Graph 2: Major furniture importing states in the U.S. 2003 (NAICS 337 data): California is importing all kind of furniture items, with emphasis on dormitories. Texas and Florida imports mainly comprise dormitories. New York imports all types of wooden furniture, Michigan also, though at a

lower level. Michigan with its strategic position at the great lakes functions as gate for imports from Canada. Florida is mainly importing dormitories.

Consumer Preferences

In the USA clients for wooden household furniture are very brand-conscious. Thus, the marketing strategy to address a special segment of the market has to be well elaborated and targeted. And it has to evolve around a "brand" (as this is crucial, Annexes 2 and 3 are entirely devoted to this issue). If addressing more than one special segment, specialised representatives should be employed to ensure full and intense coverage of demands and preferences as well as to identify changing market trends timely. In its majority consumer decisions for the purchase of household furniture are made by female household members, i.e. when it comes to "Life Style" designs and styles. "Life Style" furniture distinguished by lead themes, such as "Antique" or "Oriental" present highly attractive segments in the upper-price classes of the furniture market.

Regional preferences for certain styles are obvious. Most adequate for Barbadian style furniture is probably the South-East, i.e. Florida, which is one of largest consumers in the U.S. In the South-East, Caribbean style and Latin American style furniture encounter a huge and financially strong, yet highly diverse consumer base.

Almost half of American household furniture imports were composed of wooden chairs and case-goods such as bedroom furniture, dining room furniture, and similar products. In other words: comprising items Barbadian producers are also likely to export. Foreign produced wooden household furniture as a percentage of overall sales of such furniture in the USA stands at a staggering 38%. Approximately 15% of residential furniture imports is made up of upholstered furniture, but upholstery is bulky and does not lend itself for containerised shipping.

Marketing and distribution

The U.S. import market consists of three major segments, each accounts for about one third of the import market: (1) **Independent importers** who resell to regional wholesalers and to smaller furniture chains; (2) **U.S. manufacturers** producing part of their product line abroad; and (3) **U.S. retailers**, including high priced department stores, national furniture chains, and warehouse and home centre chains carrying furniture. There are significant differences both in how each of these importers buy furniture abroad, and the requirements for a foreign vendor to become a supplier. Most foreign **direct exporters** work with local representatives and run a branch office in the relevant states to communicate with wholesalers and retailing companies. There are U.S. service providers (e.g. the Artkins Furniture Information Centre in High Point, USA), that offer Service Packages for importers, providing expertise in marketing and distribution.

An interesting option to start exporting to the U.S market are **buyer group associations**. Central buying groups or co-operatives prefer to minimise the cost of middlemen by purchasing directly from a supplier whenever possible. This channel is used for large-scale requirements, where direct dealing with well-known suppliers is essential. These groups act as pur-

chasing agents for their individual members (smaller furniture retailers) and financial intermediaries between producers and retailers. The objective of the buying group is to make it possible for their members to compete with chain stores, which have the buying power necessary to get larger discounts from suppliers. Buying groups are tending to purchase from fewer suppliers, with whom they aim to intensify their relationship and together promote increased sales in the market. This trend is called “partner shipping”.

Import and technical requirements

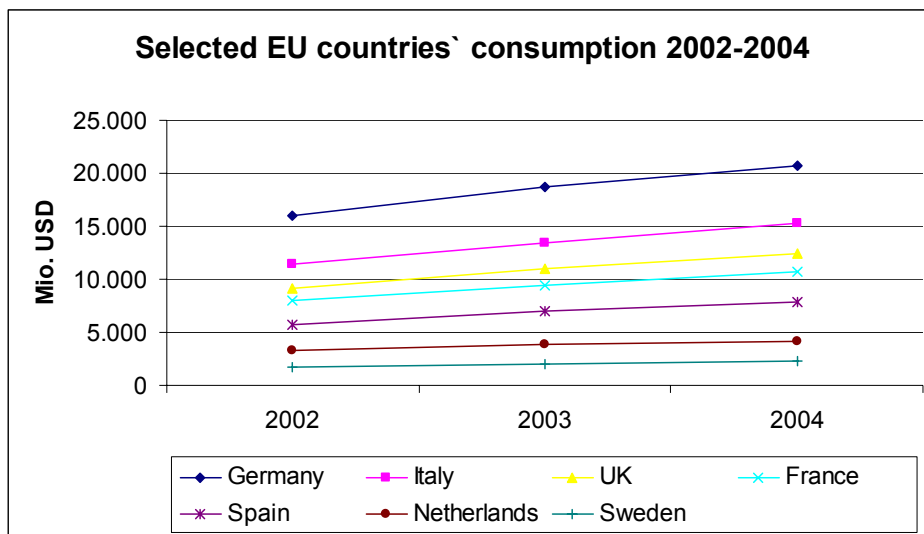
There are no legal restrictions to furniture imports to the U.S. Import of wooden furniture is generally free of tariffs (for changes and details consult: www.usitc.gov). Technical requirements depend on the final application of the furniture. I.e. fire protection requirements for upholstered and in-door furniture (Upholstered Furniture Action Council (www.homefurnish.com)) and security requirements for special types of seats (Office of Compliance-Requirements for Bunk Bed (www.cpsc.gov)) should be complied with in order to be competitive in the market.

4.1.3 Targeting the EU furniture market

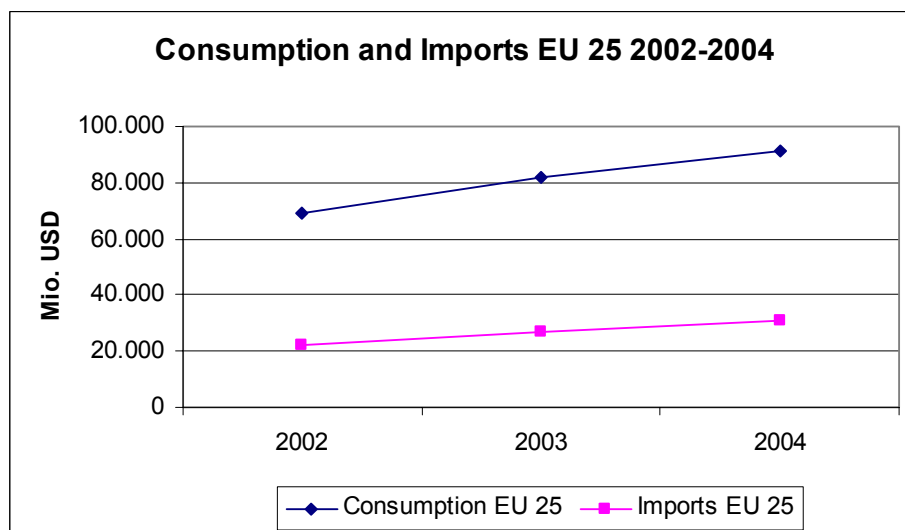
Key features

The market volume (consumption) of the European single market for furniture amounted to more than USD 90bn in 2004. The market is dominated by seven countries, making up to 80% of the total EU consumption volume (compare Graph 3 and Graph 4). Most important countries within the EU are Germany (23% of the market volume), Italy (17%) and the UK (14%). The European furniture manufacturing sector itself produced furniture worth more than USD 87bn in 2004. The export share was more than 25% in 2003. Imports to the EU are increasing, i.e. non-upholstered seating (USD 2,4bn import value) and dining/living room furniture (USD 3,5bn import value) are favoured import products.

The European furniture market is as heterogeneous as the U.S. market. Major furniture items sold in the market are: Upholstered and non-upholstered seating, dining and living room furniture, kitchen furniture and home office furniture. Upholstered seating and kitchen furniture are sizeable segments of the market, but hardly to be entered by importers from lesser developed countries, since demand is met by Eastern European and Asian producers in the low-cost segment and by traditional European manufacturers in the upper-price segment. Preferred furniture styles in the EU are: Classic, colonial, rustic/country, contemporary and avant-garde / art.



Graph 3: Largest consumers of furniture in the EU (25) market 2002-2004 Germany, Italy and the UK are major consumers of wooden household furniture in the EU. Italy and Germany also have a traditionally strong furniture manufacturing sector and dominate intra- and extra-EU furniture exports



Graph 4: Furniture consumption and imports to the EU (25) 2002-2004. The overall furniture consumption in the EU is steadily increasing. Though, structural and economical weakness of the EU single market since 2002 is slowing down this development.

Consumer preferences

There is a general trend towards low-cost and Ready-to-Assemble (RAT) furniture going on for many years now. The following market description rather refers to niche markets, since Barbadian furniture manufacturers will not be able to compete in low-cost and RAT market segments in the near future.

In most European countries consumers are highly demanding and expect value for money. Sound quality and suitability of the furniture for its designated uses are the key requirements. Allied to good quality is the expectation that the furniture item should be well designed, both in its styling and for the purpose to which it is intended. Despite increased emphasis on quality, price remains a crucial point. Price competition between retailers remains a significant feature in most EU countries. Environmental friendliness has become an important factor in purchasing decisions in Germany, the UK and Sweden. There is a growing interest in guarantees e.g. FSC label (Forest Stewardship Council) that furniture is made from sustainable woods and natural and environmentally friendly materials and finishes.

Consumers try to mix different interior styles and take multiple ideas to create an original interior. The boundaries between styles have become much less clear. Special interior decorative effects are achieved through small furniture, accent colours and accessories. Consumers buy accessories to match the furniture that they purchase, so manufacturers who can offer this additional service will benefit.

Colonial and oriental styles remain popular. Promising market opportunities can be found in the colonial style, renewed classic style and romantic style as well as in the contemporary style combined with exotic accessories. All styles are supported by small furniture items e.g. stools of solid wood with ethnic, folk and oriental designs, including curves, latticework, wrought iron.

Distribution and marketing

For exporters from developing countries, the physical distribution of furniture in the European market is challenging and it would be recommendable to have a warehouse in an EU country. When exporting furniture for the first time, European importers are the best channel to make use of. They have a good knowledge of the market and provide the safest and most effective method of distribution.

With the growing influence of fashion in furniture, furniture stores change their range more often (than 2-3 times/year), giving the store an ongoing innovative image. New furniture ranges can be combined with all sorts of accessories, creating a total interior concept. For an exporter it is important to be aware of this concept. He should try to make a link here when introducing his products, even at importer level. Shop interiors appeal more to consumer target groups and can range from classic, colonial to contemporary to ultra-modern. In shop interiors, products are clearly and well laid out with some stores offering a relaxation/lounge area and some inter-activity (e.g. computer-aided design corners).

Potential partners for exporting to the European market are:

- a) **Domestic manufacturers** have been confronted with rapidly rising production costs, which have rendered manufacturers uncompetitive (especially in labour-intensive production lines), manufacturers are increasingly assuming the role of importers. Like importers they look for low-cost sources that produce furniture on a made-to-order basis, instead of purchasing ready-made articles. The main advantage is that these items can be made according to their own design, quality and colour specification.

- b) **Buying agents** do not buy or sell on their own account and work on a commission basis for their principals. Most agents represent more than one manufacturer, although competition is avoided. Often the buying agent has his office in the supplying country. **Selling agents** work on a contract basis for one or more manufacturers. They often sell from stock in order to meet their clients' short-term demand. They also work on a commission basis. Stock is often formed on a consignment basis.
- c) **Department stores, large furniture chains and discount** outlets also buy furniture directly from foreign suppliers. This may involve intermediary activity by a selling agent on behalf of the manufacturer or a buying agent on behalf of the (multiple) retailer. This method of doing business has become more popular since it cuts out several intermediaries, thus reducing costs and enabling the retailer to offer the product at a lower end price. On the other hand it is not suitable for the current structure of the Barbadian furniture sector.

Import and technical requirements

Import duties for furniture products range from 0 to 5.6 %. Import duties are only payable on parts, seats/furniture of cane, osier, bamboo and kitchen furniture (consult www.douane.nl for details). The European market is more sensitive in terms of health-safety and environmental requirements than the U.S. market. Regulations that have to be met imperatively and other issues to be considered are listed in part 1 of the report.

4.1.4 National, regional and US-markets for antique reproduction furniture

The appearance of Colonial West Indies furniture is not so different from North America's colonial furniture. This holds particularly true for the furniture inspired by English styles (namely the Georgian style and Chippendale designs). Experts like Michael Connors attribute "a kind of earthy vigour, even in its most graceful examples" to the colonial West Indies furniture. The turned legs and posts of West Indian pieces are generally wider than in the South Carolina style, probably due to the islands' once plentiful supply of large mahogany trees.

However, the US-market with its penchant for the sumptuous and playful style of the South can be expected to be receptive to the distinctive style of Barbadian furniture.

4.2 Competitive positioning

A number of furniture manufacturers (mainly from the US, see chapter 4.7.3) have adopted what can be described as a Caribbean style. However, none of them is based in the Caribbean. The marketing strategy for "Barbadian Vernacular" furniture should stress the fact that the furniture presented here are truly Caribbean, made by Caribbean craftsmen (USP).

4.3 Selecting the right product(s)

4.3.1 Barbadian standards: Product pre-selection by the Historical Committee

After having conducted an audit of historical pieces available in Barbados, the Historical Committee has set up a list of standards, i.e. pieces of furniture that could be included in a “Barbadian Vernacular” product line. The pieces are those that best capture the spirit of old-Barbados and the breezy elegance of its furniture. Samples will be photographed and compiled in a catalogue for reference.

This pre-selection of standards on which the further promotion of “Barbadian Vernacular” should be built has been the major outcome of the work of this Historical Committee. The final selection of pieces, their detailed description/documentation and a selection of the craftsmen who will be entrusted with their manufacturing are yet to be done.

To give the process attention by the wider public, the selection of prototypes itself could become the subject of a PR campaign. Short-listed craftsmen will be asked to come up with their interpretation of the pre-selected products for the three pre-defined product lines within two months of the announcement. The winners of the design competition will be awarded contracts to produce the award-winning pieces under the label “Barbadian Vernacular”. The right to market these pieces is to be subrogated to the “Barbadian Vernacular” marketing board, a private entity.

Most of the antique furniture that have been passed on from generation to generation in Barbados and that can still be found today dates from the 19th century. While the early colonial merchants and planters had furnished their spacious homes with furniture imported from Europe, it soon became obvious that these imports could not resist the tropical climate with its heat and humidity, and insects; the island termites feasted on the European softwoods and the heat dried the glue and evaporated it. Out of necessity to have more durable and more adapted replacements that own furniture were manufactured in Barbados, copying the styles of the imports.

The first joiners were trained as shipwrights and plantation carpenters who would craft furniture from indigenous hardwoods, mainly mahogany. European, neo-classical and even colonial Anglo-Indian influences percolated here and many West Indian pieces show an intriguing mixture of styles. The various strains could easily meld in one piece “leaving the uninitiated viewer today charmed but slightly bewildered” (M. Connors). Caribbean joiners and cabinet-makers crafted their own highly stylised motifs such as pineapples, sunbursts, sandbox fruit, banana leaves, palm fronds and nutmeg fruits.

But the differences in style will only be perceived by the connoisseur and generally speaking Barbadian furniture that speak to an English heritage do have a comparative advantage when addressing consumers in the US market.

Original pieces from the colonial era are hard to come by these days. Also, they are too precious for the rough-and-tumble of everyday use. Beautifully crafted reproductions have therefore come to the market, both in Barbados and in the US. These reproductions respond much better to today’s way of living with smaller rooms, a preference for lighter colours, the heating and air-conditioning of rooms and a generally more mobile/flexible lifestyle that requires occasional relocations. Further to this, the contemporary styles of production favour simpler designs that are less labour-intensive to manufacture than antique furniture.

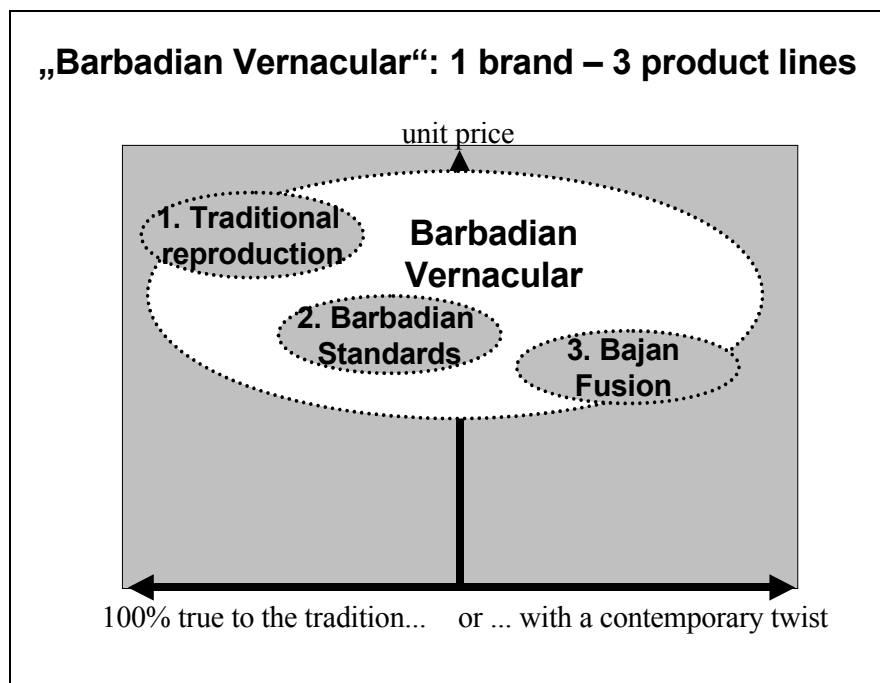
BARBADIAN STANDARDS	
Name and description	comments
no 1 Four poster bed A carved posts with bedhead B carved posts with plain bedhead C simple turned post (slim) D stump bed (shortened four poster)	
no 2 Side table / bedside table A slender turned legs B slender legs with drawer C slender legs with drawer + cupboard below	
no 3 Console/desk/sideboard (Huntboard) A tall with turned legs (no back) dining room, hall console B lower with heavier plain leg and marble top C Barbados small sideboard turned or reeded legs and carved back D side cabinet	with or without drawers
no 4 Berbice/planters chair A caned with folding arm B upholstered slung	fully caned (or upholstered)
no 5 Double and single end couches A double with simple back fully carved back with details B single ended with simple back	
no 6 Coffee table	can be based on no 2 or no 3
no 7 Round dining table A splay legs and brass casters B tripod base	table top square, rectangular or oval tulip pedestal, platform base
no 8 Rectangular dining table A turned or reeded legs B on pedestals (double or triple) with brass casters	
no 9 Dining chairs A plain curved back caned	turned, reeded or saber legs
no 10 X-frame celeret A butler's tray (carved back or plain)	
no 11 Covered armoire (TV) A side console with reversed back	
no 12 Bergere chair	in 4 versions (yet to be specified)

Table 1: List of standard designs pre-selected by the Historical Committee; the shaded pieces appear to be favoured by the Minister; a final selection has yet to be taken and confirmed, though

4.3.2 Target segments for “Barbadian Vernacular” and corresponding product lines

Under the roof of “Barbadian Vernacular” three distinct product lines are required to meet the needs and likes of three distinct groups of customers:

1. **“Antique reproduction”**: customers who seek replica of antique furniture that are crafted with authentic materials furniture connoisseurs who will not compromise on styles;
2. **“Barbadian standards”**: the established upper middle class, wishing to keep up traditional styles and values; customers who wish to build a traditional home around some pieces of furniture that are full of character and history;
3. **“Bajan Fusion”**: an aspiring, young urban elite wishing to make a Bajan statement in a world of ever changing interior design fashions; traditions are not rejected, but they should not drown out modern shapes and patterns.



Graph 5: Strategic positioning of three product lines of “Barbadian Vernacular” furniture, all three are in the higher price segments

ROOF BRAND: BARBADIAN VERNACULAR			
Product lines	1) “Antique reproduction”	2) “Barbadian standards”	3) “Bajan Fusion”
Target segment	luxurious, high-end	upmarket	upper mid-market to up-market
Customers	furniture connoisseurs who will not compromise on styles, materials and	established upper middle class, wishing to keep up traditional styles and val-	an aspiring, young urban elite wishing to make a Bajan statement in a world




	prices	ues	of ever changing interior design fashions
Character of products	replicas that are a 100% true to the original, made of true mahogany meticulously scaled	antique reproduction with cautiously streamlined appearances; furniture around which homes with a love for the Caribbean tradition can evolve	contemporary furniture with a Bajan twist, that will reside comfortably in today's homes; inspired by tradition, not shying away from eclectic combinations
Sample			
	traditional four poster bed with rich frets; 19 th century original	antique reproduction four poster bed with slightly sleeker lines	modern interpretation of the four poster bed (to the left), still to be recognised as "truly Bajan"
Source	Barbados National Museum	Dasrat Sugrim	Workbench
Materials	mahogany and other species traditionally used; modern varnishes	tropical hardwoods and softwoods; modern varnishes	tropical hardwoods and softwood

Table 2: Three product lines of "Barbadian Vernacular" representing three interpretations of the same heritage

4.4 Institutional prerequisites

The marketing of "Barbadian Vernacular" furniture is to be done by a marketing board yet to be set up for this purpose. The marketing board shall be an organization created by furniture manufacturers of Barbados. Initial financing can be provided during the first months to get the activities off the ground, for instance through hiring a marketing manager. After this initial phase (maximum: 1 year), the "Barbadian Vernacular" marketing board has to operate commercially and pay for itself; for well defined purposes (appearance in trade shows, preparation of marketing material...) it might still receive government funding.

Leadership and strategies of the marketing boards shall be set through votes by the members, i.e. the participating manufacturers of antique reproduction furniture. The marketing board will act as a pool, controlling the price of the "Barbadian Vernacular" furniture by forming a legal cartel.

4.5 Production

4.5.1 Sourcing of the raw material

Species

By tradition, “Barbadian Vernacular” furniture has mostly been crafted out of local mahogany wood. When freshly cut, the mahogany native to Barbados can be reddish, pinkish, or salmon coloured. It turns to a deep rich red or reddish brown as the wood matures with age. Mahogany has a fine to medium texture, with uniform to interlocking grain, ranging from straight to wavy or curly. Irregularities in the grain often produce highly attractive figures such as “fiddleback” or “mottle”. Mahogany polishes to a high lustre. Joiners appreciate it for its excellent working and finishing characteristics; experienced joiners say it is “sweet to work”, i.e. it responds well to hand and machine tools, has good nailing and screwing properties. It also turns and carves superbly.



Mahogany is regarded as Barbados’s premier wood for fine cabinetry, high-class furniture, trimming fine boats, pianos and other musical instruments, sculpture, joinery, turnery, figured and decorative veneer, interior trim, and carving.

It is to be noted that traditional craftsmen were far from using only mahogany even when producing fine pieces of furniture. Superb pieces that can be found in the workshops of long-established workshops are often made of pine with an upper layer of mahogany veneer; only the more prominent/exposed parts of the furniture will be made of solid mahogany.

While mahogany used to be abundant in Barbados little remains of the local mahogany resources today. Only occasionally are trunks available when a tree is felled on private premises for construction for instance. As an endangered plant, mahogany is a CITES II listed species, its international trade is thus restricted (Caribbean mahogany was listed in Appendix II in, 1992; the listing includes logs, sawn wood, and veneer sheets). The listings requires a so-called non-detriment finding and export permit by the exporting party.

Drying

Joiners have therefore turned to other tropical hardwoods (rosewood, various woods imported from South America) and to soft pine wood as substitutes.

Timber is generally sold “air dry”. For export furniture drying the timber becomes a key issue. To prevent movement in wood once it is being used in the centrally-heated and dry environment of US and European homes wood needs to be dried under controlled conditions. This ensures that gross dimensional changes through shrinkage are confined to the drying process. Ideally, wood is dried to that equilibrium moisture content that will later (in service) be attained by the wood. This will keep further dimensional change to a minimum.

A dry kiln is a major expense--an all electric 2,000 board foot kiln, with a small electric boiler, would cost over USD 30,000. This fact, coupled with today's rising energy costs, makes small scale application of typical drying procedures impractical. In recent years, electric dehumidifier kilns have been developed for the small wood user but even those kilns require a substantial capital investment, and energy costs are significant. Joint investment in kiln drying facilities could be a medium-term task for a future furniture manufacturer association.

So, while the procurement of a kiln to dry the timber might be to substantial a cost for any of the small businesses to participate in the “Barbadian Vernacular” campaign, they do at least have to make sure that they purchase kiln-dried timber when producing furniture that is to be exported.

Joint sourcing of wood working enterprises

Joint purchase of the sector is not common, increasing individual costs of the raw material. Furthermore, lack of quality of imported raw materials, i.e. insufficiently dried sawn wood is a severe problem, reducing quality and increasing production costs of furniture. Joint sourcing activities may comprise:

- An office open for all wood working enterprises (including construction sector); costs for running the office to be covered by enterprises (kick-off support from the government).
- Joint purchase of the raw material and negotiation of prices and product requirements.
- Significant reduction of transaction costs for the individual companies.
- The office may employ a purchase agent, who travels to the countries of origin, i.e. of sawn wood, and controls quality and quantities of the respective orders.

Significant synergetic effects could be achieved if the Central Purchase Office of the Ministry of Finance would take over collaborative functions. Furthermore, joint sourcing could be an entry and starting point for a sector market survey methodology, allowing to trace sector in- and outputs in co-operation with the national statistical office.

Mahogany reforestation campaign – A gift to future generations

As aforementioned the natural resource base in Barbados has been depleted. Mahogany has internationally become a symbol for the exploitation of the tropical forests, rather than being synonymous for high-quality, exclusive wood products, as it once used to be.

Reforestation efforts in Barbados, aiming at re-establishing a considerable natural population of Mahogany, addresses three final goals:

- a. Long-term provision of high-quality, locally processed raw material for the Barbadian wood working enterprises. Of course, the quantities to be provided by the reforestation will not fully meet the demand of the industry. However, yield per ha after a 25 year rotation period and reasonable 10m³/ha annual growth may reach 160m³ of high quality Mahogany saw logs.



- b. Under marketing aspects, the sourcing from sustainably managed Mahogany stands is an asset in the increasingly environmentally friendly market for wood products.
- c. The reforestation efforts will contribute to raise awareness for the Barbadian history and identity. Future generations will acknowledge these efforts and benefit from it ecologically and economically.

The reforestation program could be realised as a joint effort of the private sector, the Ministry of Energy and Environment under the PR management of the CoE.

Surfaces and finishes

The treatment of surfaces is a technical question as much as it is one of principle: to what extent will the “Barbadian Vernacular” brand accept the use of non-traditional techniques to treat the wood, especially the surfaces?

Pickling is a case in point: Although certain stains are sold under the name pickling stain, technically, pickling is a method not a finish. Originally, pickling was performed on new wood to make it look old. Today when most people refer to a pickled finish, they automatically think of a white or off-white pastel semi-transparent stain applied to an open-pored wood such as oak or ash. This finish is quite fashionable today. The stains that are now labelled and sold as pickling stains are usually heavily pigmented white or off-white stains. They can be purchased in oil or water-based formulations.

finish	standard mahogany	pickled pine	pickled pine with gold
sample			

The most popular stains offered for “Barbadian Vernacular”-style furniture; while all of them look traditional, only the standard mahogany to the left is untreated

In line with the specific character of the various product lines one option is to limit finishes of the “Antique Reproduction” product line to a “standard mahogany” finish (while accepting hardwoods other than mahogany itself). The “Barbadian Standards” product line can include “pickled pine” and “pickled pine with gold” finishes, while “Bajan Fusion” would be open to even more innovative surfaces

4.5.2 Workshops and companies to participate in the campaign

The manufacturing of traditional furniture and reproduction antique furniture is a vanishing craft in Barbados. Today, there are not more than 10 small workshops on the island that master this art.

Winston Thorne and his son Leroy Thorne own one of them. With their workshop in Salisbury, St. George, they are specialising in refurbishing old (antique) furniture (a second income driver being the production and refurbishing of church furnisher, mainly pews). Most of the machinery is over 30 years old, Mr. Thorne sen. brought the first machines with him on the plane when returning from the UK in 1975. Now, the establishment is due for an upgrading of the machines to be done with BIDC's technical and financial assistance.

Until a few years ago, the Thornes produced furniture for large department stores (COURTS, Dacosta-Mannings, ...) but have moved away from this activity because they found the profit margins and sales terms to be too restrictive.

Some years ago, they made a timid attempt to advertise following the very successful renovation of the wooden cover of a Singer sewing machine. The ad resulted in a overwhelming number of requests to carry out that same repair. Following this experience, Mr Thorne decided to abstain from similar advertising campaigns and to rather work for repeat customers and upon their recommendation to others. However, the anecdote can be taken as a strong indication that there is a very substantial demand in Barbados itself for repairs of wooden furniture (and similar household goods).

The Thornes do not (re-)produce antique furniture but have rather entirely specialised on refurbishing old pieces. In their workshop the full range of traditional furniture styles can be found: Berbice chairs, single-ended couches, planters' chairs, Morris chairs, top chairs, head hangers... - all brought there by old-established families for repair. They have also experimented copying and adapting a rocking chair that probably comes from Brazil. So far, the piece is a prototype and there is no clear plan how to market it and whether to produce it in larger numbers, at all.

It remains unclear, if this specific workshop would be in a position (and willing!) to engage in the larger scale production of "Barbadian Vernacular" furniture to be marketed under an umbrella brand name. Making use of Mr. Thorne's rich technical experience is imperative. It is planned to carry out a detailed assessment of "Thorne's Furniture Establishment" as part of BIDC's promotional program for the furniture sector.

A (preliminary) identification of further craftsmen and workshops will be a crucial next step in the "Barbadian Vernacular" campaign. The selection is to be done either by the "Historical Committee" or by BIDC's Business Development unit.

4.6 Setting the price

Marketing theory offers a number of strategies to set the price on a given product. In doing so, it needs to be decided where to position the product and quality and price. The worldwide furniture market displays all strategies that come as combinations of a) the price (low, medium or high) and b) the product quality (also: low to high). To set the price for "Barbadian Vernacular" furniture the value delivered and the value perceived by the customers have to be balanced.

To establish the appropriate price (i.e. the price that the customers are prepared to pay) a six step procedure is suggested:

1. Define the pricing objective
2. Assess the demand
3. Estimate the cost

4. Analyse competitors costs, prices and offers
5. Select a pricing method
6. Set the final price

Many of these parameters yet need to be set or determined (starting right from the very furniture models that are to be promoted) and the actual pricing will have to be done at a later stage. In doing so the procedure above can provide a guideline.

The following considerations might guide the pricing process for “Barbadian Vernacular”:

ad 1.: Defining the pricing object: What is the strategic objective when selling “Barbadian Vernacular” furniture? Is it to secure the survival of Barbadian furniture manufacturing industry and to make sure it gets a foot in the door of the international antique (reproduction) furniture market? In that case an “interesting (i.e. low) price” might be warranted. Or is the aim to maximise profits from selling the furniture in the near future? Or: to penetrate the market and to secure a substantial market share in the longer run (at the expense of immediate benefits)? Or (finally): to become product-quality leader, something that requires a very long term commitment, investments in machinery, training and a refinement of technologies. Entering the market with comparatively high prices secures a position in the upper third of the set of strategies depicted in Graph 6. But, to become product-quality leader in a market (or a segment thereof) requires a particularly long-term commitment.

ad 2.: Assessing the demand: Assessing the existing demand for a given (yet to be determined) product is crucial to establish its price sensitivity. Each price will lead to a different level of demand; the relation between alternative prices and the resulting demand is captured in a demand curve. Generally speaking, customers are less price-sensitive to items they buy infrequently such as furniture. Also, customers are not so price-sensitive if the product is distinctive, has no substitutes, or products that are assumed to be of high quality, prestige or exclusiveness. All of this applies to “Barbadian Vernacular” furniture and can be interpreted as a justification for a rather high level of prices.

ad 3.: Estimating the cost: Bearing in mind the limitations of the Barbadian furniture industry spelled out in the first part of the report (lack of raw material, high fixed and variable costs, obsolete machinery, deficiencies in the training of young professionals) it will not be possible to offer the furniture at “economic”, “good-value” or “super-economic” prices. Costs set a floor to the price and for “Barbadian Vernacular” furniture it will need to be medium to high to make any profit.

ad 4.: Analysing competitors costs, prices and offers: An extended search on the internet has revealed that competitors in the field of antique reproduction furniture follow a high-value or premium strategy when pricing their products. This does not mean that the same strategy will have to be followed for “Barbadian Vernacular”, however, it provides a good justification to do so – if this should be the target suggested by the other analytical steps described here.

ad 5.: Selecting a pricing method: with the information of steps 1 to 4 at hand the price can be calculated either by a standard markup on the calculated price per unit or by setting the price so that it yields a target rate of return. As an alternative, pricing can be based on the perceived value of the furniture (i.e. the value proposition that the customer is ready to accept). Perceived-value pricing works best with value buyers (for whom value matters more

than price). Price buyers look for simple products and are prepared to accept a limited service if that means they pay a lower price. To offer products for price buyers should not be an immediate target for the marketing of “Barbadian Vernacular” furniture.

		PRICE		
		low	medium	high
PRODUCT QUALITY	high	1. super-value strategy	2. high-value strategy	3. Premium-value strategy
	medium	4. good-value strategy	5. medium-value strategy	6. overcharging strategy
	low	7. economy strategy	8. false economy strategy	9. rip-off strategy

Graph 6: Price-quality strategies; bearing in mind the high quality that the “Barbadian Vernacular” furniture is to display pricing will be done as per super-value, high-value or premium-value strategy

A convenient approach to explore the market and its competitive response is to set prices by going-rate pricing (setting the prices largely on the competitors’ prices). However, this method does only make sense if the product in question is a standard product that can be compared easily. The designs of “Barbadian Vernacular” furniture are of course unique, yet, the current rates for antique reproduction furniture of Ethan Allen (sold as “British Classics”) provide an important orientation for the pricing.

Peer assessment of prevailing price levels: the “British Classics” product line of Ethan Allen’s					
SINGLE DRESSER	USD 1499		Tall Chest	USD 1199	
Mirror	USD 449		Night Table	USD 569	
Double dresser	USD 1499		Mirror	USD 299	
Plantation Poster Bed	USD 1499		Chest	USD 799	

Graph 7: Prices for “British Classics” on offer at Ethan Allen’s; these prices can serve as a reference for going-rate pricing of “Barbadian Vernacular” (source: <http://www.ethanallen.com>; Jan 2007)

4.7 Distribution

4.7.1 Showroom and distribution centre in Barbados

Key for the distribution of “Barbadian Vernacular” furniture will be a showroom with retail facilities and wholesale distribution centre in Bridgetown. This “Barbadian Vernacular” centre has to be centrally located, preferably between the port and the city centre so that tourists can reach it conveniently.

The centre will be the place where the tourists and other customers can experience the furniture, where they see them and touch them. The actual production however will be done in the workshops of joiners around the island and yet to be selected. While it will be possible to buy furniture in the centre (not least for the local customers), the primary function of the centre will be to serve as a point of accepting orders for furniture that will then be shipped to the home countries of the visitors.

A size of 1,000m² should be sufficient to display the furniture in its best light (rather than jam it into every nook) together with accessories such as lamps, framed pictures, tableware, racks, rugs, bed coverings... of the finest available qualities.

The most convenient solution that can be implemented with a minimum of time and effort would be to install the showroom at the Pelican Craft Centre. With a variety of crafts and cottage industries represented, the Centre that provides an adequate setting to get the campaign up and running.

4.7.2 Overseas marketing centres/showrooms

To enter overseas markets, physical presence in the respective market will be of a huge advantage. Sales agents or partner foreign companies can establish showrooms and sales branches at strategically favourable sites in selected export countries, or the Barbadian enterprises in co-operation with the Centre of Excellence initiate such marketing “hotspots” on their own.

In the U.S. market, the state of Florida (i.e. Miami) offers favourable conditions for opening up and running such a marketing place. The representation could comprise a permanent show room, a retail distribution facility and a distribution centre.

In Europe, the furniture centres (in terms of sales and design trend-setting) of Rome, London or Cologne would be most appropriate for these efforts (London being the most convenient location as B IDC has a representation there).

However, the regional market also is important to be covered. Next to a showroom with retail facilities in Barbados itself, Trinidad and Tobago with its huge turnover in regional furniture trade could be the most adequate location for establishing a regional marketing branch.

4.7.3 E-commerce and internet-based marketing

The growing importance of e-commerce in the furniture sector

Deregulation across a number of industry sectors in the EU and the US has increased the flexibility of their economies and has enabled them to react rapidly to changes in demand. With no doubt, e-commerce is responsible for some of this (if only as a means for making data available and for making possible the online use of information to facilitate the order and delivery process). Full, integrated e-commerce in the furniture industry is still some way off, but it is as much a threat for a country like Barbados as it is an opportunity to be thoroughly looked into. For eventually, the use of developing country programmers and proprietary software will enable large and small companies in the business to take a cheaper route to success in this trade. Managerial efforts to appreciate the value of e-commerce and to use it will be crucial to this uptake.

- In the two years to 2001, many middle-market American furniture firms shied away from selling to consumers online. Reaching these consumers required advertising and promotion – how did one do this within a reasonable budget and how did one make up for the absence of the touch-and-feel effect which often had a determining impact on sales? Recently however, changes in consumer perception have raised expectations. Today 5% of all furniture firms expect 20% of their sales to be business-to-consumer (B2C); 21% anticipate business-to-business (B2B) sales to rise to the same level. To attain their goals, any firm wishing to go online must:
- improve its supply chain management
- improve its communications and cut administrative costs

- build up a professional website with ordering facilities (including order fulfilment and customer-service operations)
- improve its relationship with supplier to obtain better control of the purchasing process
- provide access to a 'live' person to build consumer confidence

Furniture firms with websites must ensure that these present a sharp image, as customers use the internet as a research tool for products, prices, styles and shop locations and as a means to view the products they are looking for. Websites must be easy to navigate to attract serious buyers, The sites must provide quality product information, shopping tips and a dealer/distributor locating systems.

Business-to-business sites (B2B)

Manufacturers' sites offer production control and direct ordering facilities to other businesses. They can operate even when located at some geographical distance between the supplier and the customer.

In the United States, www.FurnishNet.com picked the ashes of net companies that had gone bust to build links and automate transactions, acknowledgements of orders, etc. shipping notes and invoices for suppliers. The target is to shorten cycle times and drive down operating costs. Currently, it manages USD 885m in purchase-order volume, the electronic transaction exchange continues to grow and includes more than 700 business (end of 2006).

A number work from Asia; an example is the Taiwan-based www.globalfurniture.com.cn. Oston Global Furniture is a high-end case goods manufacturer, importer and wholesale company. It offers turnkey services and is able to manufacture, import and direct deliver a variety of quality furnishings from around the globe to any city in the world.

RTO Online (www.rtoonline.com) is a website for the rent-to-own industry. It has added an online marketplace for B2B to allow rent-to-own buyers a platform to find and purchase new products and services. The site has about 75,000 hits a month, it has members in 31 states of the USA and four countries. Recent activity has highlighted the need to work with manufacturers on electronic transactions and the development of XML-based digital products using wireless bar-code scanning to ensure that correct manufacturing and delivery information is provided to the consumer.

Business-to-consumer sites (B2C)

With the bursting of the dot.com bubble in 2001, the exclusive use of internet sites as opposed to those linked with bricks-and-mortar shops fell sharply. This trend has since reversed and internet sites that are better presented and more frequently used have come into being. Manufacturers, especially those with galleries and in-store displays, are applying new concepts that enable the consumer to make decisions on the basis of online information.

Thomasville (www.thomasvillecabinetry.com) for example, uses online imaging technology, exclusively for Home Depot sites, for semi-custom cabinetry. The technology enables the

customer to browse through a variety of kitchen, bath, home office and home entertainment styles and select details such as mouldings, wood grain, and accessories.

'Furniture-on-the-web' is a subsidiary of the 'On The Web Marketing Group', which represents a variety of online companies and handles the customer service, order processing and order fulfilment for these companies. The company was started in 1997 and is currently a privately owned corporation founded in the state of Nevada. It's furniture related offer, including furniture labelled as 'Barbados furniture' can be found on the internet under www.furnitureontheweb.com/searchOTW/. The website is a fine demonstration of the strong consumer and service orientation that a successful website has to offer these days. While it might be difficult to realise this level of perfection at first go, an alternative for the Barbadian (vernacular) furniture industry might buy into an existing website with a full-fledged online marketing functionality.

Ethan Allen (www.ethanallen.com) was started as a housewares manufacturer in 1932. Today, Ethan Allen has 310 stores, 21 manufacturing plants, and sales of nearly \$1 billion located across the United States. As one of the largest furniture companies in the United States it claims to be America's leading one-stop home furnishings resource. The company sells a full range of furniture products and decorative accessories through an exclusive network its retail stores. Next to its impressive network of retail facilities, Ethan Allen currently has 17 manufacturing facilities, including three sawmills located throughout the United States. For the marketing the company focuses on first class assistance to the customers when planning their homes with a free design service. Accessed through the company's website customers can plan their rooms themselves from home or in-store with the assistance of an Ethan Allen design consultant. Once a wish list of wood furniture, upholstery, and accents has been selected, the user can place it and move it around in a two-dimensional floor plan. This innovative technology saves consumers valuable time and prevents costly mistakes, as consumers can see how the selected products will look in their rooms before making a purchase.

British Traditions (www.britishtraditions.com/) is a US-based manufacturer of authentic European country reproduction furniture. The company with its headquarters in Grandview, MO, has showrooms in Kansas, Dallas, Denver, Chicago, Atlanta and High Point. The market niche of this company is making new furniture that looks genuinely antique and offering it at very reasonable price points. Sturdy mortise-and-tenon construction and dovetailed drawers are standard; tables feature handsomely designed and detailed turnings. The company offers more than 20 standard finishes, ranging from a hand-applied, traditional English wax finish through painted and distressed alternatives to the currently popular "crackles", to "faux" finishes requiring as many as a dozen separate applications. British Traditions claims to have been uniquely successful in combining the best the past has to offer with a modern production approach to meet the needs and desires of today's furniture buyer. The products of British Traditions can be purchased at many retailers or through Interior Designers throughout the United States. The company does not offer an online shopping facility, though. Retailers or interior designers can ask for a password for access to the wholesale section of the website with special online product guides, a wholesale price list, and an extended database.

Another example of a company specialised in the reproduction of antique furniture is James Dew and Sons of Guilford, Connecticut (www.jamesdew.com/). The company is a third generation family business originally dealing in fine 18th century American Colonial antique

furniture. For the past 25 years, it has been offering indistinguishable replicas such as reproduction Windsor Chairs, reproduction, Queen Anne Tables, reproduction 18th century cupboards, reproduction Chippendale mirrors and an array of other types of colonial American reproduction furniture.

North Carolina Furniture Discounters carries a wide section of quality furniture that come in nine different style lines (Country, Mission, Traditional, Contemporary...) and eight different finishes (including 'Mahogany'). The company only has an online showroom only (www.ncfurniturediscounters.com/) and does not print catalogues in order to keep prices as low as possible. All of the items are available online and new items are constantly being added. N.C: Furniture Discounters is an online furniture dealer without an actual store, thus eliminating costly warehousing, display and inventory related costs. This allows them to pass on reduced costs to their customers. Because of this savings, manufacturers ask their names not to be displayed on the web site.

BAIK is an Indonesia-based company that might serve as an example of an appealing web-presence paired with a good online shopping facility (www.baikdesigns.com/). BAIK - Indonesian for "Fine" - is the result of a more than 20 year love affair of the owner with the islands of Indonesia. Working with top collectors, designers, and craftsmen BIAK Designs brings fine and rare Indonesian items to the US, mainly to Hawaii. Visitors of the website have access to a beautiful selection of antiques and contemporary designs from Indonesia, Thailand and Burma without having to travel to Southeast Asia. The range of goods on offer include teak antique and reproduction furniture (but also stone carvings, garden accessories, home accents, lighting, and other unique artefacts).

SINCERO (www.sincero.co.uk/) from Norwich (UK) is a dealer specialised in restored antique furniture, copies, replicas, authentic antiques and reproduction furniture, supplying clients in both the UK and international markets. The company specialises in walnut furniture from 1650 - 1875. However their ever-changing stock also includes woods such as yew tree, olive wood, rosewood, mahogany and other timbers.

Colony Furniture Shops (www.colonyfurn.com/index.mgi) are based in Charlotte, North Carolina. The company was founded in 1950 and offers continental antiques and American classics as well as upholstery and accessories. Colony buys direct from producers and conducts its own antique-buying trips. Middleman mark-ups for furniture and accessories are therefore positively rare. Due to its purchasing power retail better acquisition prices are paid by independent interior designers. As a special service, Colony offers services from professional designers to help the customers create masterpieces in every room. Customers are invited to state their vision generally or deeply, Colony designers then create perspective drawings in colour, prepare furnishing samples, and present floor plans to show options.

Perhaps the widest range of reproduction furniture similar in style to "Barbadian Vernacular" can be found under www.reproductionfurniture.com/, Britain's leading mail-order centre for period style furniture. Some 25 years ago they were the main suppliers of reproduction furniture to Maples, Waring and Gillow and other quality retailers. Since then, they realised that due to their national advertising and reputation, a large proportion of their customers would prefer to purchase by mail order direct from them. Their website is a continuation of their mail order business established earlier. If customers wish they can still come and visit the company's showrooms to see the full range. They offer the largest range of re-

productions in the country, which enables the client to purchase all his/her requirements from the same company. Consequently the finish, quality and style will be consistent, whether it's for office, bedroom, dining room or sitting room.

At the production and finishing factories in Somerset the products are manufactured, polished, glazed, leathered and hand-finished. Within the range of some 600 items the company can produce tables to seat 6 to 60 people, and open bookcases 2ft to 9ft high and 2ft to 200ft wide! The company claims to be the most experienced mail order company in the UK for this type of furniture. Selling direct to the customer at factory prices gives them the obvious advantage of being able to offer most competitive prices.

Amongst many others, the range of products includes a 'Solid Mahogany' product line, hand made by local craftsmen in Central Java, Indonesia. The furniture is hand carved and features traditional English cabinet making methods. The pieces are all hand polished to give them a very authentic antique finish.

Another UK-based online dealer is Global Furniture (Global Teak Ltd), offering a wide selection of products from around the globe. The website (www.global-furniture.uk.com/) hosts an impressive range of mahogany reproduction furniture including four poster beds, hall stands, dining tables, chests of drawers, easy chairs and bookcases. The ranges of furniture are supplies in a variety of colours; five standard colours are used as a baseline because they have been found to work well for many markets (antique yew, dark red mahogany, antique mahogany, dark mahogany and Victorian mahogany). Further to this, the furniture are offered in a choice of finishes such as 'classic', 'antique distressed', 'antique painted' and 'standard NC'. The company primarily targets the UK market (and to a smaller extent the continental European market by special arrangement). Global Furniture's website is merits a visit for the wealth of information it offers on styles, colours, finishes and for the very its informative furniture glossary.

Among the Barbadian manufacturers of "Barbadian Vernacular", Dasrat Sugrim is probably the best established. His website (www.dasratsugrim.com/) informs that Guyanese-born Dasrat picked up his trade rather accidentally: "Originally, he had wanted to study mechanical engineering, but this was not possible at the time. Instead, he took a job as an apprentice at Opel Arts and Crafts, a now defunct government firm in his native Guyana, during his school vacation" thus changing the course of his life. Dasrat's love of art drove him to learn more about this craft and it became a hobby to him. Refurbishing furniture he actually saw the way that a piece stood up for a hundred years. He was impressed by the craftsmanship of earlier generations who despite having no sophisticated machines, worked with a remarkable degree of precision.

In 1986 Dasrat Sugrim migrated to Barbados and began working with a local antique refurbisher. The job allowed him to hone his skills, and gave him an insight into the antique furniture business. His painstaking work was popular with many clients. In 1991 he organised a furniture exhibition at the Sea View Hotel (now The Savannah) that received a lot of attention.

As a direct result, his business began to expand and not even a fire which destroyed his factory could deter him. Presently his newly renovated showroom displays pieces which he built himself, as well as other pieces made in his factory in St. Vincent.

Dasrat Sugrim Furniture offers to provide a special service to customers: he manufactures furniture just on the basis of photos, pictures or just an idea that customers present. All joints are dovetailed; the only nails used are there more for decoration than to hold the furniture together. "We build pieces that will actually last a life time," he explains. "The glue that we use is the same used to make boats. I don't see the sense of putting a lot of hard work into carving a piece of furniture and putting a good joint together and not using the right glue to make it last."

The Prime Minister of Barbados, the Hon. Owen Arthur, is said to have several pieces of Dasrat's furniture in his office. The Crane also has more than 50 of his four-poster beds, which also feature prominently in the Crane's Advertisements for their luxury suites and hotel rooms. Other places where his pieces can be found are Royal Westmoreland and Sandy Lane Hotel. Dasrat's designs are award winning. In 1995, he won the first (and last) Furniture Manufacturer of the Year Award, sponsored by the Barbados Manufacturing Association and Courts Ltd.

The management of the company emphasizes that they are "not a catalogue company" and that they rather a direct, highly individualised contact with the customers. Consequently, Dasrat Sugrim's does not have an internet-based sales facility. Yet, out of the companies operating in the "Barbadian Vernacular" sector, this one comes closest to the capacities to produce for a larger (export) market.

Other internet portals and directories

The major search engines for the industry are www.furniturefan.com (for consumers), www.furnituretoday.com (industry news and sourcing) and www.homefurnish.com (consumers). On the basis of an analysis of 400,000 page views clicked by 17,000 visitors, the website www.homeportfolio.com concluded that 80% of its customers shopped by product category. It is therefore important for manufacturers to participate in an online environment that quickly leads customers to product selection rather than to brand choices.

An example for a shopping portal that hosts furniture very similar in style to 'Barbadian vernacular' is: www.antiques.a1-lifestyle-stuff.com/antiquefurnitureproduction. With love for antiques and self taught computer skills a British couple has managed to start an internet-based business. Their Antique Shopping Guide lists 25,000 antique stores across the country. Stores are listed by state and by city within the state. The couple took business listings off the internet and from mailing lists he bought, designing the website, in six months. The first listings went on the site for free; now he charges USD 12.00 a year for a basic listing. If a shop owner wants an upgrade - a description of the shop, or a link to its e-mail or website -- fees increase but are still a worthwhile investment looking at the traffic that the site builders have managed to direct to their site.

This is but a cursory overview of internet-based marketing activities in the furniture sector. A more thorough analysis of it is required once a marketing strategy has been devised for the Barbadian (vernacular) furniture.

5 FROM PLAN TO ACTION

5.1 Short, medium and longer term measures

5.1.1 Short term (within the next month)

- The Historical Committee has to **narrow down its selection of twelve furniture models** (see Table 1) to a more operational number of three (to five). The Committee seems to have made this selection (possibly: a) (bed)side table; b) console/ desk/sideboard (huntboard) with or without drawers and c) double and single-ended couch). However, it has not been documented and has yet to be communicated.
- The committee also needs to decide whether the production could be assigned to manufacturers of antic reproduction furniture in neighbouring countries (marketing would still be done by the Barbadian grantor of the license)
- Furthermore, the committee has to define standards regarding materials (wood species, varnishes and glues, caning material) and techniques to be employed (to make joints, to cane the furniture...)
- A sourcebook with photographs illustrating the variety of models is in the making. It appears that it will not have the quality to make the material for a coffee-table book (as intended earlier) but will serve as an important guideline and reference.
- Based on the identification of the three (to five) models a design competition is to be held and manufacturers/craftsmen to be invited to come up with their interpretation of the models. Rewards can be advertised for the those prototypes which best embody the spirit of the models. In line with the later marketing the competition shall be advertised for the three product lines (“Antique reproduction”, “Barbadian standards” and “Bajan Fusion”)
- Alternatively, BIDC can right away identify three to five „champion“ craftsmen in Barbados who will be asked to produce prototypes of the selected models, for one, two or all three of the three product lines, depending on their personal styles and capacities.
- In either case, the formulation and subsequent selection of prototypes should be supervised by the industrial design department within BIDC.
- In parallel, BIDC has to **determine who among the craftsmen/companies has the capacity to produce “Barbadian Vernacular” at a competitive level.**
- BIDC should resume talks with the Curriculum Development Office at the Samuel Jackman Prescod Polytechnic to include “Barbadian Vernacular” as a specialisation in the new curriculum for joiners;

5.1.2 Medium term (in the coming three months)

Once the campaign is initiated the following activities will help to back up and sustain it:

- Create a **logo and a visual identity** for “Barbadian Vernacular” (with its three product lines “Antique Reproduction”, “Barbadian Standards” and “Bajan Fusion”)
→ BIDC Design Section (possibly assisted by a PR agency)

- Carry out a detailed assessment of the **machinery at the Polytechnic's workshop** and draft a plan for its upgrade (including additional staff / resource persons)
→ (BIDC Industrial Services Division and Polytechnic)
- Set up a **furniture producers' association** and develop its institutional capacities so that it can manage / coordinate of the "Barbadian Vernacular" marketing campaign
- Have an **additional competition** asking craftsmen to present their suggestions for "Bajan Fusion" pieces
→ (Historical Committee with BIDC Design Section)
- **Produce "Barbadian Vernacular" furniture on a test scale and start to market it through an existing(!) e-trading platform;** then scale up the production and trade as per the demand of the market
→ Furniture producers (with assistance of BIDC)
- A **show room** to put the furniture on offer either in Barbados or overseas is an additional though not essential option; a convenient option could be to open such an outlet in one of the stores at the Pelican Centre; this location could cater for the domestic customers and tourists alike
→ BIDC (and furniture producers)
- To increase ownership for the "Barbadian Vernacular" label, **the responsibility for the marketing of the furniture is to be handed over to an association of furniture producers** by mid-2007. Avoid that the promotion of "Barbadian Vernacular" is perceived as an undertaking of BIDC or any other state agency
→ BIDC and furniture producers

5.1.3 Longer term (in the coming six months)

Some of the suggestions that have been brought forward in the process, so far (like the establishment of a distribution centre in Barbados and/or Miami) will only make sense once measures outlined in chapters 5.1.1 and 5.1.2 have been implemented.

- Have an additional competition asking craftsmen to present their suggestions for "Bajan Fusion" pieces
→ (Historical Committee with BIDC Design Section)
- Produce "Barbadian Vernacular" furniture on a test scale and start to market it through an existing(!) e-trading platform; then scale up the production and trade as per the demand of the market
→ Furniture producers (with assistance of BIDC)
- A show room to put the furniture on offer either in Barbados or overseas is an additional though not essential option; a convenient option could be to open such an outlet in one of the stores at the Pelican Centre; this location could cater for the domestic customers and tourists alike
→ BIDC (and furniture producers)
- To increase ownership for the "Barbadian Vernacular" label, the responsibility for the marketing of the furniture is to be handed over to an association of furniture producers

by mid-2007. It is to be avoided that the promotion of “Barbadian Vernacular” is perceived as an undertaking of BIDD or any other state agency
→ BIDD and furniture producers

5.2 Open questions

- **Sufficient capacities in Barbados?:** Do Barbadian manufacturers indeed have the capacity to produce “Barbadian Vernacular” furniture on an industrial scale? No doubt: individual joiners have the required knowledge, but does their number constitutes a critical mass to embark on a “Barbadian Vernacular” campaign?
- **“Barbadian Vernacular” made in Trinidad&Tobago and St. Vincent?:** It is not so far off to have “Barbadian Vernacular” produced by craftsmen of other countries in the region (under Barbadian licence); an understanding has not yet been reached regarding this fundamental issue.
- **“Barbadian Vernacular” - a government programme?:** For the campaign to become sustainable, ownership has to be transferred to the private sector as soon as possible. It yet remains to be seen who assumes this responsibility in the absence of a furniture manufacturers’ association and/or a company suggesting itself to play a lead role.

5.3 Focus on “service”

5.3.1 Service as a major asset of the Barbadian furniture sector

The survey carried out amongst manufacturers and distributors (documented in part 1 of the study) reveals the strong role that service-related criteria are a perceived strength of the sector. We have to bear in mind that the sector has to compensate for being disadvantaged in its access to the raw material (with no own forest resources on the island) and that it has to cope with a level of incomes that often is found to be prohibitive. “Service” is therefore the approach to build upon. “Service” comprises all activities benefiting the customer that are not immediately product related. What does that mean in concrete terms?

5.3.2 Pre-sales service

Pre-sales services include detailed documentation about the product and the producing companies, guidance and support of the customer in his/her selection of the adequate product, laid open quality standards and/or the opportunity for selected customers to have their say in product development.

In the case of “Barbadian Vernacular” furniture it will be crucial to document the distinctiveness of the product, including the strict principles that are being respected by the manufacturers in order to come up with a product of the highest quality and authenticity possible.

5.3.3 Sales service

Sales services include the establishment of trust during the sales conversation, a strong recognition for the customers' demands, providing the customer with alternative options, giving the customers time to reflect on his preferences and giving the customer access to testimonials of other customers.

For the sales of "Barbadian Vernacular" (to be done mainly through the internet, at least in an early stage of the campaign) it will mean to set up a webshop (if this is the marketing channel to be chosen for the sales of the furniture) that is highly informative and convenient to handle. It has to provide an absolute safety for credit card payments that will have to be beyond any doubt on behalf of the customers.

5.3.4 After-sales service

Probably most neglected of all types of services are "after-sales services". They include a warranty, a efficient complaint management routine, support with spare parts, technical information and tips on care and repair and surveys enquiring about the customers' satisfaction.

After-sales services pose a particular challenge to all types of sales, and particularly so for deals that are concluded over the internet. The very sites through which the products will be marketed are also the most important channels of securing after-sales services. They should offer a selection of technical leaflets that give instructions for the care of the furniture, leaflet with information to professionals for (minor) on-site repairs and an online helpdesk providing quick and reliable answers to whatever questions the customers might have about their purchases.

ANNEX: REFERENCES/SOURCES

Annex 1: Potential partners for implementation

Companies

Company Name	Address	Remarks / Websites
CHAMPION FURNITURE	Cavans Lane 436 1539 Six Roads 416 4515	www.ashleyfurniture.com
Dillon Amber Dane Inc.	1 st floor, Clapham Court, Clapham Close, Wildey, 426 4836	Commercial + residential furnishings + accessories www.dillonaberdane.com
Matrix Marketing / Furniture Alliance	Grazettes Ind. Park 417 0710	Interiors, furniture, accessories contact: Mr Randolph Sandiford
Antique Creations	Bldg 4, Six Roads Ind. park, St. Philip 423 2139	Refurbishing furniture, custom-made furniture, porch posts
Regal Furniture Manufacturing Co. Ltd.	Spring Garden Complex Spring Garden	small to medium size enterprise
Woodshapers	1 Jezreel Sandford St. Philip 423 1656, 423 1384	exquisite custom made furniture, including antique reproductions
Dasrat Sugrim Furniture Design Centre	St. Lawrence Main Road Christ Church 420 2347	traditional furniture rather small, manager from Guyana www.dasratsugrim.com/

Individuals

Name	Position, other remarks	Contact details	Member of the Historical Committee?
Members of the HISTORICAL COMMITTEE			
NICHOLAS FORDE		NicholasForde@hotmail.com	yes
Andy Temprow	joiner by profession	427 8356	yes
Karl Watson	historian at the University	Watson_Karl@yahoo.com	yes
Patrica Bayne		Patricia_Bayne@barbadosbusiness.gov.bb	yes
David 'Joey' Harper		429 1990 Aschemk@lycos.com	yes
Linda Bowen		228 6763 (school) 428 2981 (home) 233 2515 (cell)	yes
CRAFTSMEN and other resource persons			
Louis Kirton			no
Mark Hill			no
BIDC professionals			
Erskine Thompson	Director Industrial Services, SBDO	467-8503; 232 8360 EThompson@bidc.org	yes
Michael Piggott	Head Design Dept.	427-5350 MPiggott@bidc.com	yes
Anderson Cozier	Senior officer	427-8537 ACozier@bidc.org	yes
Philip Marshall	Industrial designer		no

Annex 2: Branding and other marketing aspects

The aspects of branding (and other parts of the future marketing strategy) have been discussed repeatedly during this mission). They are not part of the situation analysis in Barbados and provide more general / generic insights into the matter. They are therefore presented here, i.e. as part of the annex to the study.

Marketing: Branding and brand management

The importance of branding

A brand is a name, symbol or design (or a combination of them) intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors.

Brand management is the application of marketing techniques to a specific product, product line, or brand. It seeks to increase the product's perceived value to the customer and thereby increase brand franchise and brand equity. Marketers see a brand as an implied promise that the level of quality people have come to expect from a brand will continue with present and future purchases of the same product. This may increase sales by making a comparison with competing products more favourable. It may also enable the manufacturer to charge more for the product. The value of the brand is determined by the amount of profit it generates for the manufacturer. This results from a combination of increased sales and increased price.

Brands differ from other assets such as patents and copyrights in one important aspect: Under trademark law, the seller of a brand is granted exclusive rights to the use of the brand name *in perpetuity*.

In marketing management, a brand is seen as a complex symbol that can convey a number of different meanings on various levels:

- attributes: a brand brings to mind certain attributes. “Barbadian Vernacular” should suggest authentic, traditionally crafted, high-prestige furniture;
- benefits: attributes must be translated into functional and emotional benefits; “Barbadian Vernacular” being “traditionally crafted” can translate into the functional benefit “as a buyer, I won’t have to buy another piece of similar furniture; as a luxurious watch I won’t actually own this piece of furniture, but rather look after it for the next generation”
- values: as a brand “Barbadian Vernacular” says something about the producers’ core values that include safeguarding traditions and the national cultural heritage, quality and craftsmanship, rarity, value, aesthetics and emotions. Living with a piece of “Barbadian Vernacular” will become a silent statement about the owner’s values. Each piece of “Barbadian Vernacular” will have to be made to become a story, a tale of emotions. Who gave you this piece of furniture, on what milestone in your life did you get/buy it, with what words did you receive it, to whom will you pass it on one day. All pieces of “Barbadian Vernacular” will have the ability to create an emotional response in their own right. This emotion is not just at the heart of every piece of furniture - it has to be at the heart of all those companies making these furniture.

- culture: the “Barbadian Vernacular” brand shall also represent a certain culture, and a culture of traditional furniture manufacturing; all stages in the making of the furniture have to follow this tradition, from design to production, from assembly and finish to distribution. The uniquely comprehensive nature of this production method will have important benefits: traditional skills and tools, which have not changed for hundreds of years, will still be used on a daily basis. Thus the experience and know-how of the master furniture makers will be passed on to new generations.
- personality: “Barbadian Vernacular” will project a certain personality, a generous, no-nonsense, mature personality with respect for his/her traditions, family and culture. In this context it might also be an option to make a well-known person (like a sportsman, a senior figure from the cultural scene or a television personality the brand ambassador for “Barbadian Vernacular” furniture.

Building a brand for “Barbadian Vernacular”

When building up the “Barbadian Vernacular” brand it also needs to be researched what position the brand occupies in the minds of potential customers so that brand identity can be anchored effectively. The first step will be to collect words associated with the brand name “Barbadian Vernacular”: tradition, good craftsmanship, old-fashioned, mahogany, expensive...

Secondly, the brand should be personified: the craftsman having manufactured furniture for decades abiding to practices that have been passed down/refined from generation to generation, a furniture maker who has remained true to himself; or: a kind-hearted and long-sighted patriarch of a family with a long tradition worth to be safe-guarded. These persons will deliver a picture of the human qualities of the “Barbadian Vernacular” brand and carry this positive image into the wider public.

Finally, the brand essence will have to be synthesized by a process of “laddering up” from the immediate attributes consumers perceive up to the more abstract goals they try to satisfy with the brand. Ex.: “Barbadian vernacular furniture are well built” – Why is it important they be well built? “Being well built they will last a life time” – Why should they last a life time? – “Because I want to pass them on to my children and grand-children” – Why would you like to pass on your furniture to your children and grand-children? – “Because the caring for the family and its own identity is a central purpose of my life.” – Why do “Barbadian Vernacular” furniture help you in this? “I believe that in this world of constant change it is important to have something that is lasting and such furniture represent something lasting, that gives us something to adhere to – “Barbadian Vernacular” stand for exactly this!” The laddering up will give an ever deeper understanding of the prospective buyer’s motivation and will suggest some possible campaigns.

The marketing campaign can then focus on the brand essence, or the marketers can ladder down and feature “Barbadian Vernacular” at a more concrete level such as emotional benefits or attributes of the furniture.

Tools for branding “Barbadian Vernacular”

A common misconception is that brands are basically built by advertising. It is true that conventional advertising (TV, newspapers and magazines) used to be the most effective brand-building tool. But nowadays, many users are zapping or ignoring the commercials, the number of magazines and other print media has gone up significantly making it increasingly difficult to reach all the prospective costumers.

We therefore have to turn to other tools for attracting attention to the “Barbadian Vernacular” brand. An important options to consider are publications in magazines of special interest such as “Architectural Digest”, “Town&Country” “Traditional Home”, “Today’s Custom Home”, “Home Design” (these magazines feature elegant homes and gardens in the U.S.) or “MACO Caribbean Homes” as well as “MACO’s Sourcebook” (that present interior design from a clearly Caribbean perspective).



MACO is a product of Toute Bagai Publishing, a Trinidad-based publishing house to produce internationally distributed magazines showcasing Caribbean living. In the Caribbean alone, Maco sells about 35,000 copies per issue (with Christmas sales at about 50,000 copies). This is bolstered by over 20,000 copies of Maco distributed to over 60 countries worldwide. The magazine is published three times per year. The various MACO publications of Toute Bagai offer the possibility to present featured articles to an audience interested in Caribbean interior design.

Another publication of interest is “Island Life”. The quarterly magazine focuses on architecture, interiors, real estate, art, travel and cuisine. The editors describe it as “the Caribbean's premier lifestyle publication”. What makes this publication so interesting is the fact that the same publisher produces two lifestyle television programs endorsed by the CTO (Caribbean Tourism Organization). “Island Life Styles” and “Island Life Destinations” highlight travel and elegant living in the Caribbean mirroring Island Life magazine's editorial content. The programs are broadcast weekly on TV stations throughout the Caribbean and are also aired as part of in-flight entertainment programmes of airlines flying to the region.

Marketing communications

Next to the traditional marketing channels (advertisement), the “Barbadian Vernacular” marketing campaign should take several steps to make use of personal influence channels to work on its behalf:

- Sponsorships: “Barbadian Vernacular” could become a promoter of events such as golf tournaments, yachting regattas or other prestigious sports competitions that can be linked to the specific flair of traditional Caribbean living
- Factory visits: just as the visits organised by Mount Gay Rum, the makers of “Barbadian Vernacular” should invite visitors to the island to watch the manufacturing of the furniture first hand and to make these visits a worthwhile activity that even short-term visitors will not want to miss

- Appearance in trade shows: when appearing in trade shows with “Barbadian Vernacular” furniture, it is important to make it clear that “Barbadian Vernacular” is not a
- Event marketing: like many car manufacturers, the very presentation of the furniture (and the addition of new products to the line) can be made an event in itself; if made a regular event, this can build customer relations up to the point that people eagerly expect the “new” models to come out
- Social cause marketing: “Barbadian Vernacular” can achieve a following by donating money to charitable causes such as residential homes for the elderly. Such an engagement would also be a good way to prove the sense of responsibility and attachment of the “Barbadian Vernacular” sector to the island
- Viral marketing: Viral marketing and viral advertising refer to marketing techniques that use pre-existing social networks to produce increases in brand awareness, through self-replicating viral processes, analogous to the spread of pathological and computer viruses. It can be word-of-mouth delivered and enhanced online; it can harness the network effect of the Internet and can be very useful in reaching a large number of people rapidly.

Viral marketing sometimes refers to Internet-based stealth marketing campaigns, including the use of blogs, seemingly amateur web sites designed to create word-of-mouth on the internet for a new product or service. Often the goal of viral marketing campaigns is to generate media coverage via “offbeat” stories worth many times more than the campaigning company's advertising budget. The term “viral advertising” refers to the idea that people will pass on and share interesting and entertaining content. Viral marketing is an interesting option to get support for the launch of the “Barbadian Vernacular” brand because of the ease of executing the marketing campaign. Its main strength is its ability to obtain a large number of interested people at a low cost and to address the target group very directly with a minimum of costly spreading losses (such as experienced in newspaper advertising).

- Winning influential/believable people for testimonial advertising: respected people known to the wider audience can be engaged to publicly show their appreciation for “Barbadian Vernacular”; when hired as an advertising medium celebrities do set great store by being associated with the specific flair that surrounds “Barbadian Vernacular” furniture.

Marketing research

The customers identity and their satisfactions with the “Barbadian Vernacular” products should be monitored. One way of getting this type of feed-back from the buyers is to get them to register their products and to issue a product passport together with a certificate of authenticity. Customers will be contacted 6 or 12 months after they have purchased the piece of furniture and will be given the opportunity to give their feed-back on the product as well as their suggestions how it can be improved in the future. This type of after-sales customer care will be to the mutual benefit of the customers and the “Barbadian Vernacular” brand.

Annex 3: A note on protecting intellectual property

Introduction

During discussions with decision makers in Barbados the (future) protection of intellectual property was raised time and again: How will Barbadian producers of “Barbadian Vernacular” be able to stay in control of this brand? How to avoid that free-riders (possibly in other countries of the region) copy the designs and market them on their own?

Basically, there are two approaches to deal with this threat, 1) a market driven and 2) a legal one:

1. a strong reputation for the original high quality “Barbadian Vernacular” will lead customers to insist on getting the branded original instead of imitations. This approach is the target of the marketing strategy described above.
2. a legal protection of intellectual property rights might be a useful complement to a successful marketing. The options and the possible scope of this flanking measure is presented here. However, it should be borne in mind that the legal tools will only make sense if the marketing proves successful – legal tools can never make up for a poor marketing.

Knock-offs in the furnishings industry

How important is it to give Barbadian vernacular furniture a unique features that make them real originals. Valuable brands are an asset in the furniture industry just as much as in the fashion industry. And knock-offs are becoming a serious nuisance to the sector.

In the United States, the home furnishings industry considers knock-offs to be a serious and growing concern. Lobbyists for the sector cite a survey that ‘In Furniture’ published October 2003. It shows that:

- 88 % of manufacturers and 90 % of retailers agree that knockoffs are a serious issue within the home furnishings industry.
- 90% of retailers admit they've purchased a knockoff that they knew was a knockoff, and 92% of them said the primary reason they buy knockoffs is "knockoffs are lower in price than the original."
- and both agreed that "there are more knockoffs today than there were 10 years ago" - 79 % of retailers and 71% of manufacturers.

The survey also made clear that "a number of manufacturers are ready, more than ever before, to take action against knock-offs."

As a reaction to this alarming situation the ‘Foundation for Design Integrity’ (FDI) has been founded in 1994. It supports those who conceive, design, engineer and develop innovative new products for the Interior and Architectural Design Community and their clients. By educating and informing the industry, and the public, about the importance of original design, FDI fosters integrity in the specification and procurement of interior and architectural products. FDI helps set standards, protects original design and serves as the voice of the industry.

The FDI sees its mission rooted in Article 1, section 8 of the US Constitution, which states, that “[the Congress shall have power] to promote the progress of science and useful arts, by securing for limited times to authors and inventors the exclusive right to the respective writings and discoveries.” Since the FDI's founding more than 150 members have come together to promote awareness within the industry about the importance of protecting original design, and to assist members in preventing the unlicensed duplication of their proprietary product designs. While it is an educational organization, FDI's influence also touches on legal and business issues. Membership in FDI is open to product designers, manufacturers, showroom operators, the media, design associations, students and educators, design professional such as architects and interior designers and all those who share and interest in promoting original design.

A recent (2006) campaign of Foundation for Design Integrity' (FDI) geared towards raising the awareness against knock-offs in the furniture sector

In 2006, the FDI has entered into an advertising partnership with the 'Interior Design' magazine. Interior Design is running industry service announcements encouraging the protection of original design in issues throughout the year.

Patents

A patent is a set of exclusive rights granted by a state to a patentee for a fixed period of time (usually 25 years from the filing date) in exchange for the regulated, public disclosure of certain details of a device, method, process of composition of the invention. This invention has to be new, inventive, and useful or industrially applicable.

This exclusive right granted to a patentee is the right to prevent or exclude others from making, using selling, offering to sell or importing the claimed invention. The rights given to the patentee do not include the right to make, use, or sell the invention themselves. Rather, the patentee may have to comply with other laws and regulations to make use of the claimed invention.

A patent is an exclusionary right. It gives the patent owner the right to exclude others from infringing the patent.

Patents can generally only be enforced through civil lawsuits; for instance, a US patent, by an action for patent infringement in a US federal court. In order to prove infringement, the pat-

Knock-offs cost more than you think.



Original Donghia® Chair

Cost: List price plus crate.

Photography of Donghia® Chair courtesy of Donghia® Furniture/Textiles. Lit. Original Donghia® Chair protected by U.S. Patent No. 3,138,117.



Knock-off Chair

Cost to showroom and purchaser:
List price **plus** legal fees, possible judicial award to original designer, cost to replace cheap knock-off at client's project, and damage to designer's professional reputation and designer's integrity.

When you manufacture, specify or buy knock-off goods, you hurt our industry, our brands and our companies' bottom lines. And in many cases, you break copyright, trademark and/or patent laws. But when you buy original designs, you make a positive difference to our companies and to our industry. To learn more about the fight against knock-offs, please visit the Foundation for Design Integrity's website, www.fdi.org.



ent owner must establish that the accused infringer practices all of the requirements of at least one of the claims of the patent. An important limitation on the ability of a patent owner to successfully assert a patent in civil litigation is the accused infringer's right to challenge the validity of that patent.

In order to obtain a patent, an applicant must provide a written description of the invention in sufficient detail for a person skilled in the art to make and use the invention. This 'patent specification' is often accompanied by figures that show how the invention is made.

The grant and enforcement of patents are governed by national laws, with the World Trade Organisation being particularly active in this area. The TRIPs Agreement has been largely successful in providing a forum for nations to agree on an aligned set of patent laws.

Applied to furniture design, patent protection is limited in scope (and clearly more narrow than let's say 'trade dress' protection); but it is generally more easy to obtain.

However, as patents have to be filed within one year of the first public use (or offer to sale) of the product in question, this option will not apply for Barbadian vernacular (antique re-production) furniture

Industrial design rights

Industrial design rights are intellectual property rights that protect the visual design of objects that are not purely utilitarian. An industrial design consists of the creation of a shape, configuration or composition of pattern or colour, or combination of pattern and colour in three dimensional form containing aesthetic value. An industrial design can be a two- or three-dimensional pattern used to produce a product, industrial commodity or handicraft.

Under the Hague Agreement Concerning the International Deposit of Industrial Designs, a WIPO-administered treaty, a procedure for an international registration exists. An applicant can file for a single international deposit with WIPO or with the national office in a country party to the treaty. The design will then be protected in as many member countries of the treaty as desired. Design rights started in the United Kingdom in 1787 with the Designing and Printing of Linen Act and have expanded from there.

In the United States, one of the major designated target markets for Barbadian vernacular furniture, design patents are very similar to U.S. utility patents, and most of the governing law is the same. Two major differences are that design patents (1) last fourteen years from the date a patent is granted, not twenty years from the date that an application is filed, and (2), contrary to what is suggested above, cover the ornamental aspects of utilitarian objects. Objects that lack a use beyond that conferred by their appearance or the information they convey, may be covered by copyright -- a form of intellectual property of much longer duration that exists as soon as a qualifying work is created. In some circumstances, rights may also be acquired in trade dress, but trade dress protection is akin to trademark rights and requires that the design have source significance or "secondary meaning." It is useful only to prevent source misrepresentations; trade dress protection cannot be used to prevent others from competing on the merits.

Trademarks

A trademark, TM or ® is a distinctive sign of some kind which is used by an organization to uniquely identify itself, its products and/or services to consumers, and to distinguish the organization and its products or services from those of other organizations. A trademark is a type of industrial property which is distinct from other forms of intellectual property.

Conventionally, a trademark comprises a name, word, phrase, logo, symbol, design, image, or a combination of these elements. There is also a range of non-conventional trademarks comprising marks which do not fall into these standard categories.

Applied to furniture, it needs to be understood that trademarks will not protect the furniture designs themselves, but only the name/phrase used to designate the supplier. As such, trademarks can be quite valuable and important as a part of the branding and marketing of Barbadian vernacular furniture.

Trade dresses

'Trade dress' is a legal category that is similar to 'trademarks'; some legal experts say that 'trade dress' is in fact a sub-category to 'trademarks'.

What is a trade dress? The term refers to characteristics of the visual appearance of a product or its packaging (or even the facade of a building such as a restaurant) that may be registered and protected from being used by competitors in the manner of a trademark. These characteristics can include the three-dimensional shape, graphic design, colour, or even smell of a product and/or its packaging.

'Trade dress' as affirmed by the U.S. Court of Appeals for the Federal Circuit in Washington, D.C., in an earlier landmark furniture ruling in favour of Weatherend Estate Furniture (1995), 'involves the total image of a product and may include features such as size, shape, colour (or colour combinations), texture, graphics or even particular sales techniques.' Trade dress effectively prohibits infringement by any unauthorized parties, treating the designs themselves as a functioning and protected trademark.

There are two basic requirements that must be met for trade dress protection. The first is that those features must be capable of functioning as a source indicator – identifying a particular product and its maker to consumers. In the United States, package design and building facades can be considered inherently distinctive – inherently capable of identifying a product. However, product design can never be inherently distinctive, and so such trade dress or other designs that cannot satisfy the 'inherent distinctiveness' requirement may only become protectable by acquiring 'secondary meaning.' In other words, the mark may be protected if it acquires an association in the public mind with the producer of the goods.

Trade dress must also be non-functional in order to be legally protected; otherwise it is the subject matter of patent law. What is functional depends strongly on the particular product. To be non-functional, it cannot affect a product's cost, quality, or a manufacturer's ability to effectively compete in a way that does not affect its reputation. For example, colour is functional in regard to clothing because that product is purchased substantially because of its colour and appearance, but colour is not functional on household insulation, which is purchased purely to be installed in a wall and is never seen.

Historically, trade dress protection had been afforded to a product's packaging, which usually identifies the source of the goods. However, an owner seeking to obtain trade dress protection for a product design, as opposed to a label or packaging design, faces an increased burden since product designs are not normally utilized for purposes of identifying the maker of the goods, but instead are created to serve an aesthetic purpose. Accordingly, the Second Circuit has enunciated its rule that the relevant question in determining the inherent distinctiveness of a product's design is whether or not the design is likely to be understood by consumers as an indicator of the product's source.

While furniture designs may be protected as trade dress, it needs to be understood that trade dress protection is difficult to acquire. For instance in *Landscape Forms Inc. v. Columbia Cascade Co.*,³ the Court of Appeals found that the overall look of furniture (consisting of large 3-inch tubing, a powdered cosmetic finish, and bent, gentle turns that roll around the perimeter of the front of the furniture, in combination with certain seating services, supposedly giving the viewer a floating or suspended feeling) was not worthy of trade dress protection since the furniture's look was not unique or likely to be perceived by consumers as a source indicator.

To receive this legal recognition, the design must be shown to have achieved 'secondary meaning,' i.e. having acquired an association and recognizable distinctiveness that is synonymous with its originator. Once proven, the USPTO trade dress registration then serves as dual protection, shielding the potential buyer of the design from being misled as to the source and quality of an unauthorized knock-off, while protecting the exclusive trademark of the original source.

Geographical indications

A geographical indication (sometimes abbreviated to GI) is a name or sign used on certain products or which corresponds to a specific geographical location or origin (eg. a town, region, or country). The use of a GI may act as a certification that the product possesses certain qualities, or enjoys a certain reputation, due to its geographical origin.

Governments have been protecting trade names and trademarks used in relation to food products identified with a particular region since at least the end of the nineteenth century, using laws against false trade descriptions or passing off, which generally protect against suggestions that a product has a certain origin, quality or association when it does not. In such cases the consumer protection benefit is generally considered to outweigh the limitation on competitive freedoms represented by the grant of a monopoly of use over a geographical indication.

In many countries the protection afforded to geographical indications by law is similar to the protection afforded to trademarks, and in particular, certification marks. Geographical indications law restricts the use of the GI for the purpose of identifying a particular type of product, unless the product or its constituent materials originate from a particular area and/or meet certain standards. Sometimes these laws also stipulate that the product must meet certain quality tests that are administered by an association that owns the exclusive right to the use of the indication. Although a GI is not strictly a type of trademark as it does not serve to exclusively identify a specific commercial enterprise, there are usually prohi-

bitions against registration of a trademark which constitutes a geographical indication. In countries that do not specifically recognize GIs, regional trade associations may implement them in terms of certification marks.

Geographical indications are particularly important in Europe, where there has been a long tradition of associating certain food products with particular regions. Under European Union Law, the protected designation of origin system which came into effect in 1992 regulates the following geographical indications: Protected designation of origin (PDO) and protected geographical indication (PGI) and Traditional Speciality Guaranteed (TSG).

The system used in France from the early part of the twentieth century is known as the *appellation d'origine contrôlée* (AOC). Items that meet geographical origin and quality standards may be endorsed with a government-issued stamp which acts as official certification of the origins and standards of the product to the consumer. Examples of products that have such 'appellations of origin' include Tequila (spirits), Jaffa (oranges) and Bordeaux (wines).

The consumer-benefit purpose of the monopoly rights granted to the owner of a GI also applies to the trademark monopoly right. Geographical indications have other similarities with trademarks. For example, they must be registered in order to qualify for protection, and they must meet certain conditions in order to qualify for registration. One of the most important conditions that most governments have required before registering a name as a GI is that the name must not already be in widespread use as the generic name for a similar product. Of course, what is considered a very specific term for a well-known local specialty in one country may constitute a generic term or trademark for that type of product. For example, *parmigiano* cheese in Italy is generically known as parmesan cheese in Australia and the United States.

Like trademarks, geographical indications are regulated locally by each country because conditions of registration such as differences in the generic use of terms vary from country to country. This is especially true of food and beverage names which frequently use geographical terms, but it may also be true of other products such as carpets (eg. 'Shiraz'), handicrafts, flowers and perfumes.

International trade made it important to try to harmonize the different approaches and standards that governments used to register GIs. The first attempts to do so were found in the Paris Convention on trademarks (1883), followed by a much more elaborate provision in the 1958 Lisbon Agreement on the Protection of Appellations of Origin and their Registration. Few countries joined the Lisbon agreement, however: by 1997 there were only 17 members (Algeria, Bulgaria, Burkina Faso, Congo, Cuba, Czech Republic, France, Gabon, Haiti, Hungary, Israel, Italy, Mexico, Portugal, Slovakia, Togo, Tunisia). About 170 geographical indications had been registered by Lisbon Agreement members as of 1997.

The essential function of a trademark is to exclusively identify the commercial source or origin of products or services, such that a trademark, properly called, indicates source or serves as a badge of origin. The use of a trademark in this way is known as trademark use, and a trademark owner seeks to enforce its rights or interests in a trademark by preventing unauthorized trademark use.

It is important to note that trademark rights generally arise out of the use and/or registration (see below) of a mark in connection only with a specific type or range of products or services.

Although it may sometimes be possible to take legal action to prevent the use of a mark in relation to products or services outside this range, this does not mean that trademark law prevents the use of that mark by the general public. A common word, phrase, or other sign can only be removed from the public domain to the extent that a trademark owner is able to maintain exclusive rights over that sign in relation to certain products or services, assuming there are no other trademark objections.

Annex 4: Web-based information

WEB-BASED INFORMATION	SOURCE
United Nations Trade Statistics	http://unstats.un.org/unsd/comtrade/
FAO Trade Statistics	http://faostat.fao.org/
EU Trade Statistics	http://epp.eurostat.ec.europa.eu/portal/
CFARICIOM information and general trade statistics	http://www.caricom.org/
U.S. trade statistics and import requirements	http://trade.gov/index.asp
Centre for the Promotion of Imports from Developing Countries to the EU market (CBI): Trade information and import requirements	http://www.cbi.nl/
Barbados Business Information	http://www.barbadosbusiness.gov.bb/
Barbados Manufacturers` Association	http://www.bma.org.bb/
World furniture trends	http://www.furniture-market.org/

Annex 5: Literature and reference material

TOPIC	REFERENCE
Global Furniture Value Chains	Kaplinsky et al. (2003):: <i>The Global Furniture Value Chain: What Prospects for Upgrading by Developing Countries.</i> UNIDO, Vienna
	Abonyi (2005):: <i>Integrating SMEs into Global and Regional Value Chains: Implications for Subregional Cooperation in the Greater Mekong Subregion.</i> UNESCAP, Bangkok
Upgrading, innovation and systemic competitiveness	Meyer-Stamer et al. (2005):: <i>Systemic Competitiveness Revisited. Conclusions for Technical Assistance in Private Sector Development.</i> www.mesopartner.com
Barbados furniture sector	Lashley (2006):: <i>Final Report for the BIDC on the Wooden Furniture/ Architectural Millwork Industry in Barbados.</i> BIDC
	BIDC (2003):: <i>Sub-sector profile: Furniture Sector.</i> BIDC Research Planning and Information Div.

	UNIQUE forestry consultants (2007):: <i>The Furniture Manufacturing Industry of Barbados (1); Profile of a Sector in Upheaval and a Model to Facilitate its Rehabilitation</i>
	Annual Industry and Product Profiles for the Furniture Sector 1996- 2000, BIDC