EXECUTIVE INSIGHTS

The New Gatekeepers of Premium Home Furnishings

Why interior designers are becoming a critical route to market for brands and retailers

In premium home furnishings, the sale is increasingly shaped before the consumer ever sees the full range of options.

Interior designers are not just tastemakers. They curate the market. They determine which brands are credible, which products are worth presenting and which vendors can be trusted to deliver across a complex project. In many cases, designers narrow the field to a short list of just a few brands per category. Brands that do not make that list may never reach the client at all.

That makes designers far more than influencers. They are becoming a critical route to market for premium home brands and retailers — shaping what is shown, what is specified, what is ordered and what is reused across future projects.

The shift is being accelerated by a bifurcated home furnishings market. While many consumers have pulled back on discretionary home spending amid lower home turnover, inflation and higher interest rates, affluent households have remained more resilient. These consumers continue to invest in design, personalization and quality — the types of purchases where designers often play an outsize role.

For brands and retailers, the strategic question is no longer only "How do we reach the end consumer?" It is also "How do we become one of the brands designers want to show?"

A growing share of demand is becoming designer-addressable

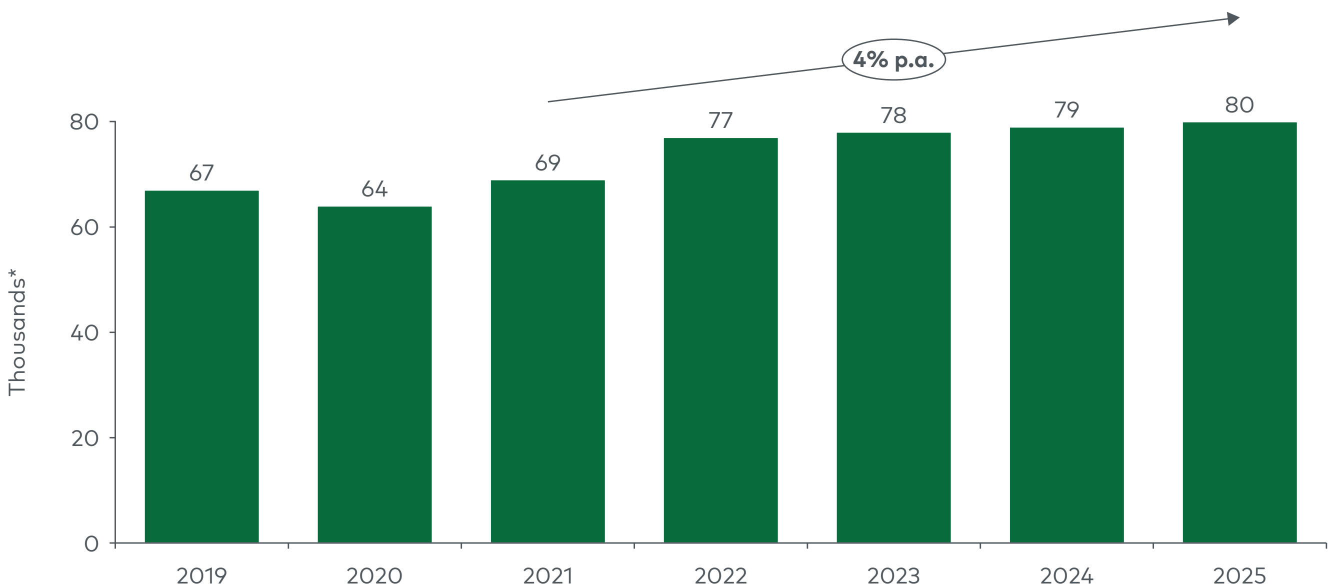
The home furnishings market has become increasingly K-shaped. Middle- and lower-income consumers are trading down, delaying purchases or avoiding discretionary spend. Higher-income households, supported by greater asset wealth and more insulation from macroeconomic pressure, have continued investing in their homes.

This matters because affluent consumers are more likely to pursue larger, more complex and more designer-led projects. They are also more likely to value customization, elevated styling, craftsmanship and professional guidance. These are precisely the categories and purchase occasions where designers can have the greatest influence.

Designer use has also broadened beyond the traditional ultra-high-net-worth segment. As more affluent and upper-affluent consumers seek help curating their homes, the trade channel is becoming a larger and more important path to premium demand (see Figure 1).

Figure 1

Number of US full-time interior designers, 2019-25



*Calculated using L.E.K. consensus number of full-time interior designers in 2025 and scaled to yearly BLS data
Note: p.a.=per annum; BLS=Bureau of Labor Statistics
Source: BLS Current Employment Statistics; L.E.K. research and analysis

The growth in full-time interior designers reinforces this point: Despite broader pressure in the housing and home furnishings markets, the designer ecosystem has continued to expand. That reflects both the resilience of the premium consumer base designers serve and the increasing role designers play in shaping home-related spend.

Designers control the short list

The power of the designer channel comes from how designers shape choice.

Consumers may think they are selecting among brands, but in designer-led projects, the most important brand decisions often happen earlier. Designers preselect the vendors and products they are willing to present, filtering the market based on aesthetic fit, quality, reliability, availability, ease of execution and their own project economics, including trade pricing, margin opportunity and incentives.

That creates a gated path to the consumer. A brand that is not known, trusted or easy for designers to work with may be excluded before the client ever weighs in.

This influence can also compound. Designers tend to return to vendors that have worked well in the past. Once a brand earns a place in a designer's rotation, it can benefit from repeated specification across projects, clients and categories. Conversely, brands that create friction — through poor service, unclear pricing, unreliable lead times or weak support — risk being removed from consideration even if the product itself is strong.

Designers are also economically motivated channel partners. Their business models are often tied to project size, product revenue or trade economics. Brands are therefore competing not only on aesthetics but also on whether they help the designer deliver creatively, commercially and operationally.

Trade programs are becoming a competitive battleground

Brands and retailers have begun responding. Recent activity suggests that companies increasingly view the designer channel as a strategic growth opportunity rather than a niche trade audience.

- **Arhaus** relaunched its trade program with a personalized dashboard, dedicated sales support, white-glove delivery, simplified pricing and omnichannel access.
- **Sunbrella** launched its first dedicated trade program, with exclusive pricing, complimentary memo samples and simplified large-order functionality.
- **Anderson Tuftex** launched a trade program offering cash rewards on qualifying specifications, free curated samples and exclusive trade events.
- **Havenly/The Expert** combined consumer-facing and premium designer platforms to support designer-led sourcing and ordering.

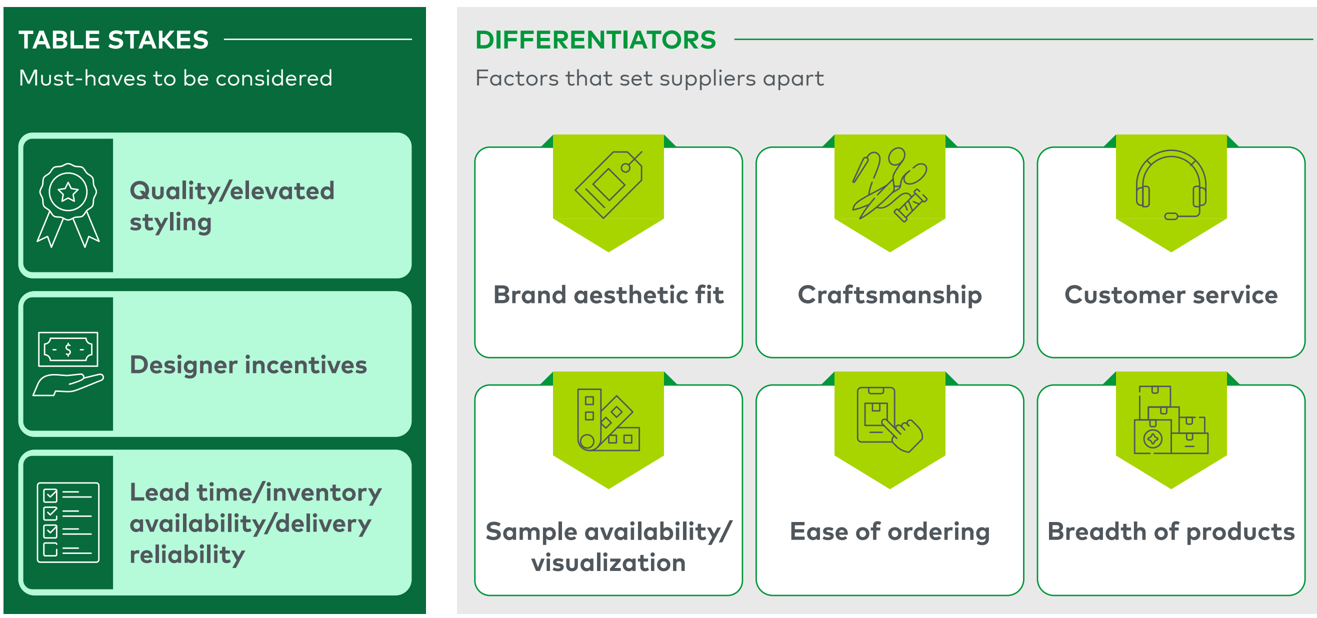
These moves point to a common conclusion: The trade channel is no longer just about offering a discount. It is about building the relationships, tools, economics and service model that make a brand easier to specify.

What it takes to make the designer's short list

Designers evaluate brands differently than consumers. Consumers may focus primarily on style, price and brand appeal. Designers must also think about client satisfaction, installation timelines, order complexity, project economics and reputational risk (see Figure 2).

Figure 2

Key factors influencing designer likelihood to carry and show a brand to clients



Source: L.E.K. research and analysis

Before a brand can be shown to a client, it needs to meet a basic threshold for product quality, trade economics and executional reliability. Without that foundation, the brand may be disqualified before it ever reaches the client.

Once those baseline requirements are met, designers look for reasons to prefer one brand over another. The brands that stand out are those that help designers sell a distinctive vision, manage the project more smoothly and reduce risk throughout the process.

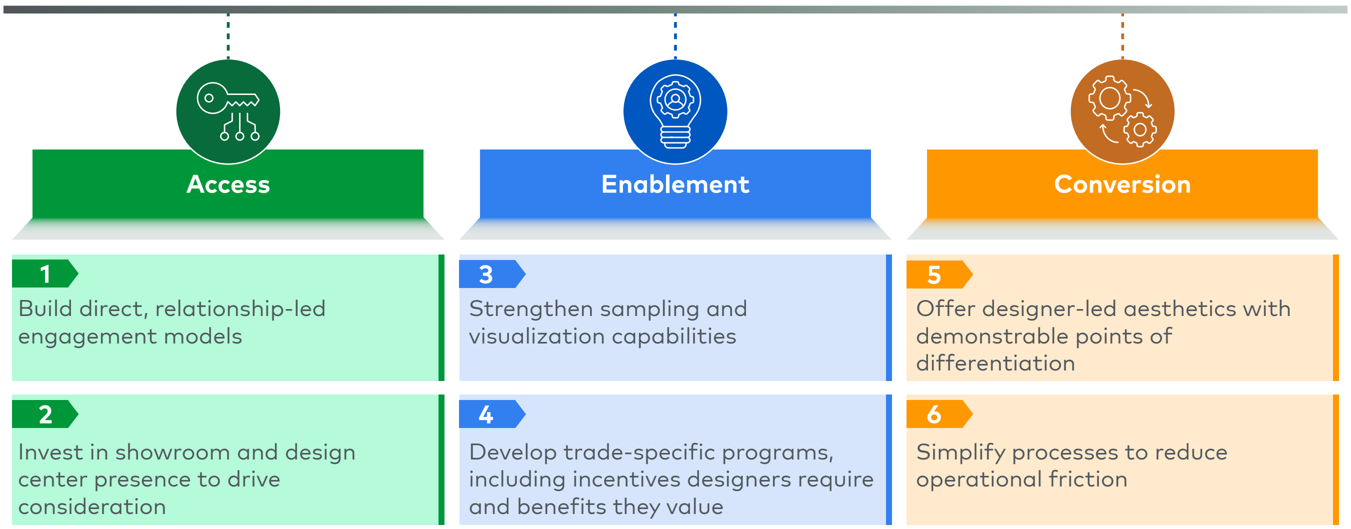
For designer-led categories, operational execution is not just a back-office issue; it is part of the brand proposition. Designers need confidence that samples will arrive on time, sales support will be responsive, lead time and inventory information will be reliable, and delivery will be handled professionally. Brands that reduce friction help designers manage projects, protect client relationships and specify with greater confidence.

How brands can win the designer short list

To win with designers, brands and retailers need to build capabilities across three linked areas: access, enablement and conversion (see Figure 3).

Figure 3

Winning with designers requires strength across access, enablement and conversion



Source: L.E.K. research and analysis

Access is about becoming visible and trusted before the project begins. Designers have limited time and tend to rely on brands they already know. Direct sales relationships, showroom presence, design center visibility, trade events and targeted outreach can help brands enter the designer's field of view and build credibility before a specific client need arises.

Enablement is about giving designers the tools to sell and specify the brand. Sampling, visualization, clear specifications, product imagery, lead time and inventory visibility, and responsive support all make it easier for designers to bring a brand into a project. The strongest trade programs behave less like discount structures and more like designer operating systems.

Conversion is about turning designer interest into repeat specification. Designers need products that help them create distinctive spaces, but they also need vendors that reduce risk. If a brand delivers reliably, protects project timelines and supports the designer through the process, it becomes easier to specify again.

This is where cumulative advantage emerges. Designers build short lists based on trust. Each successful project strengthens the case for using the brand again. Each failure gives the designer a reason to look elsewhere.

What winning brands have in common

Several premium home brands illustrate elements of this playbook. While their category positions differ, each has built relevance with designers by pairing a clear product proposition with the support model designers need to specify confidently.

- **Visual Comfort** and **Urban Electric** have built durable positions in lighting through strong showroom presence, sampling programs and trade support.
- **Thibaut** has built deep designer relationships in wall coverings through reliable trade service and differentiated aesthetics.
- **Holly Hunt** has built a strong designer position in furniture through a trade-only model, consistent showroom investment and a reputation for craft.

These examples show that designer loyalty is rarely created by product alone. It is built through a broader system: brand identity, relationship access, service, samples, economics, availability and execution.

The strategic mandate for home brands and retailers

The rise of the designer channel changes the growth agenda for premium home furnishing brands.

Marketing to the end consumer still matters. But in designer-led categories, the more decisive battle may be upstream: winning the people who decide what the consumer gets to consider.

That requires a different approach to investment. Showroom strategy, sales coverage, sampling capabilities, digital tools, trade incentives and service models should all be evaluated through the lens of designer specification. The goal is not simply to attract designers once. It is to become part of their trusted rotation.

For retailers, the implication is similar. Designers should not be treated as ordinary customers with a promotional code. They are professional buyers, project managers and repeat specifiers. Serving them well requires a more deliberate proposition.

The brands and retailers that succeed will be those that make designers want to show, sell and specify their products. Those that fall short may lose access to the most valuable projects before the end consumer ever has a chance to choose them.

For more information, please **contact us**.

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