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The digital Furniture index: how Americans buy now

The way Americans shop for furniture and kitchens has entered a new phase. Consumers get inspired online, personalize purchases, but still value stores for guidance. Expectations are evolving as fast as digital habits, and retailers must keep pace.

What you'll discover

How furniture and kitchen buyers have changed and what they expect, where consumer behavior and retailer readiness diverge, why kitchens act as the proving ground for immersive design tools, and how 3D visualization and configurators convert browsing into buying.

About this research This Furniture & Kitchen retail index is based on a survey of 9,000 American consumers, conducted in Summer 2025 by **HomeByMe with IPEA, Prodege, and Catalyse Research.** It explores how people shop for furniture and kitchens today, and their expectations for personalization and omnichannel experiences.

Executive summary

A market in motion

American consumers have fundamentally changed how they shop for home furnishings. They get inspired online, and they expect control over every detail of their projects. At the same time the need for in-store validation and the reassurance of a sales expert continues to be crucial:

- **43%** U.S. consumers now make more than half of their furniture purchases online.
- **63%** say they find their design inspiration primarily on the web.
- **64%** expect their shopping habits to change further in the next few years. Half toward more online, half toward more store visits.

50% of consumers say they would buy a sofa from a brand offering an online configurator.

What we're witnessing is hybrid behavior: digital exploration paired with in-store validation. Consumers are comfortable moving between channels, and they expect retailers to support that journey seamlessly.

53%

of kitchen buyers say a 3D configurator would influence their choice of brand.

Projects, not products

Furniture purchases are increasingly project based. This is especially the case with kitchens, where budgets are high and decisions are complex:

- **76%** of U.S. consumers want to use a 3D configurator for their next kitchen project.
- **93%** use these tools to create layouts; **74%** to visualize style.
- **27%** say personalization via 3D solutions directly triggered their purchase decision.

Retailers who cannot facilitate this mindset risk losing the whole project narrative.

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The new furniture consumer

Today's furniture shopper: Informed, inspired, and digitally confident

US shoppers are proactive, digitally fluent, and design their own buyer journey. They expect retailers to support their process rather than control it.

The web now dominates the early stages of inspiration. **37%** of consumers rely solely on online sources for home design ideas, and another **30%** blend online research with in-store visits. In contrast, only **31%** say they still depend exclusively on in-store browsing for inspiration.

Generational differences in furniture shopping

While digital spans generations, the way consumers combine channels differs by age:

Age group	Inspiration sources	Digital adoption	In-store expectations	Takeaways
18–29	**41%** want more store options	Active online, first-time buyers	Strong need for guidance, tactile experience	Balance of discovery + reassurance
30–39	**59%** use specialist websites	Active online, first-time buyers	Brand-oriented (Ashley, Walmart, Home Depot)	Digital leaders driving configurator use
50+	**60%** prefer generalist websites	Moderate digital adoption	Will travel >30 miles to favorite stores	Value in-store interaction above all

From browsing to building

Furniture is no longer purchased in isolation. Consumers increasingly plan projects that span multiple rooms, using digital tools to test ideas before stepping into a store.

- **22%** already use modern design tools to plan their home's ambiance.
- Of those, **85%** went on to build their actual projects from their 3D plans.
- **21%** say their 3D plan combined with product customization directly triggered the purchase decision.

From 3D planning usage to final implementation

Stage 1: Used AI tools

22%

Stage 2: Satisfied with AI tools

97%

Stage 3: Used result in realtime

85%

This level of digital confidence signals a fundamental shift. Shoppers are not waiting for guidance to get started. They want to experiment at home, on their own time, and arrive in-store with a plan in hand.

The hybrid advantage

The U.S. furniture purchase journey is now firmly hybrid. Consumers explore online but still want the reassurance of physical stores. Retailers that connect the two unlock the biggest gains.

- **43%** make more than half of their furniture purchases online.
- **15%** have never bought furniture online.
- **34%** plan to shop more online, while **30%** want to visit stores more often.

This dual behavior shows why digital and physical experiences must be complementary,not competing.

Even digital giants are going physical. **Wayfair,** once an online-only retailer, is opening new U.S. showrooms in 2026, while **Casper** recently launched their first physical store in New York City.

Consumer behavior vs retailer opportunity

Stage	Consumer behavior	Retailer opportunity
Early inspiration	**63%** look online first for ideas across categories	Invest in web content, galleries, and planners to capture intent early
In-store validation	Need to see, touch, and seek advice remains critical, **41%** of ages 18-29 want more store options for physical interaction with products.	Increasingly, online-first players are adding showrooms
Guided decision	**90%** of kitchen buyers consult a salesperson for reassurance	Equip staff with omnichannel solutions to collaborate with customers on projects
Digital triggers	**50%** of consumers say they would buy a sofa from a brand offering an online configurator	Treat configurators as frontline sales drivers, not just add-ons

"Whether browsing the app, visiting us in-store, or finishing up a space at home, we're here to make it easy — and fun — [for our customers] to create a home they truly love.

Liza Lefkowski, VP of Merchandising and Stores at Wayfair

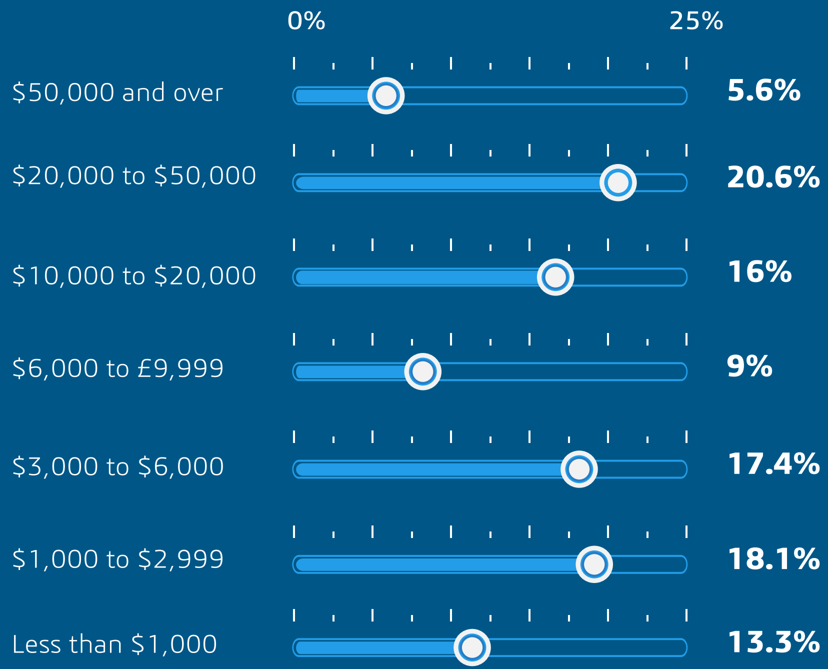
The kitchen market lens

Kitchens as the digital frontier

The kitchen is the highest-stakes category in US furniture retail: deeply considered, financially intensive, and central to daily life. It's also where consumer expectations for digital experiences are the highest, and where retailers must prove that they can deliver.

- **Average spend:** $13,393. One in four projects invest $20,000-$50,000+
- **High visibility:** 78% of kitchens open onto living areas, reinforcing their role as hubs.

Consumers approach kitchens in project mode, expecting to plan, visualize, and personalize before they commit.



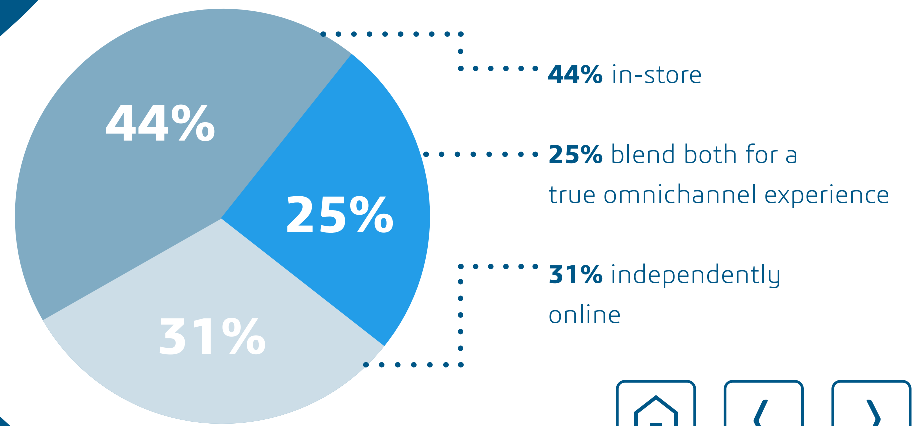
Configurators are a baseline requirement

Kitchens lead the way in the adoption of design tools. More than half of U.S. consumers **(54%)** have already used a kitchen configurator, either on their own or with the help of a salesperson.

76% of consumers say they would use a configurator for their next kitchen project.

Consumers are telling us clearly: kitchens cannot be sold without robust visualization.

Where kitchen configurators are used



Personalization as a trigger for purchase

Beyond visualization, personalization is becoming a decisive factor.

- **31%** of consumers rank personalization as a top purchase criterion (just behind the retailer's website at **35%**).
- **27%** say personalization through 3D solutions directly triggered their purchase.

For kitchens, the ability to personalize digitally is critical: choices around layout, cabinetry, materials, and finishes define the experience.

Why kitchens matter for the wider market

What happens in kitchens sets expectations **across the home.** Once consumers experience digital confidence in a kitchen project, they look for similar tools in living rooms, bedrooms, and bathrooms.

- **Kitchen projects are the entry point:** on HomeByMe's public platform, kitchens are the most commonly designed room.
- Success in kitchens **normalizes the use of configurators** elsewhere

For retailers, this means that investing in web-based kitchen planners is not only about capturing high-value projects, but also about **setting the standard** for digital engagement across categories.

American brands are relying on direct-to-consumer platforms, 3D visualization tools, and ultra-fast delivery to meet this demand. The transformation is mainly being driven by younger generations.

Mordor Intelligence - United States Home Furniture Market Size & Share Analysis - Growth Trends and Forecast (2025 - 2030)

Redefining retailer readiness

Rewiring retail for the new buyer journey

Are retailers ready to meet customer expectations? We asked a network of 20 U.S retailers, ranging from mid-size to larger retailers, about their priorities.

What do retailers think?

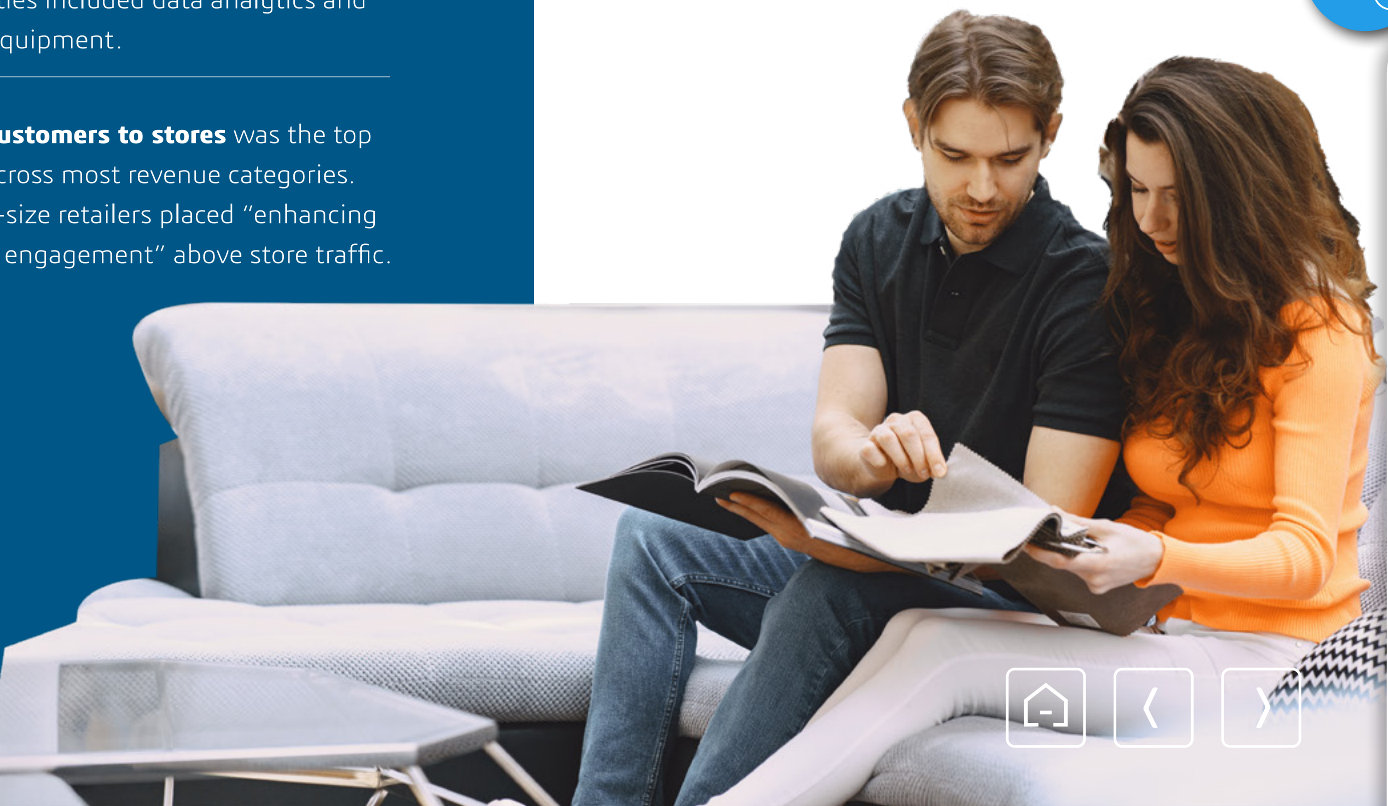
Our questions	Trends observed
What are your priorities in terms of IT investment?	Roughly two-thirds of retailers **placed digital (websites, e-commerce) high** on their IT agenda, but only one-third gave it the same weight in marketing. Other top priorities included data analytics and in-store equipment.
What are your priorities in terms of marketing investment?	**Driving customers to stores** was the top priority across most revenue categories. Only mid-size retailers placed "enhancing customer engagement" above store traffic.

This is a trend we've often observed whereby many retailers invest in their digital infrastructure but hesitate to apply the same focus to customer-facing experiences. Meanwhile, marketing still invests **too much energy on traditional channels** instead of adapting to evolving shopping habits.

Retailers who connect these two words and invest in digital tools that enhance how consumers discover, visualize, and decide, will be best placed to capture demand as hybrid behaviors accelerate.

These findings invite reflection:

- **Are investments aligned** with how today's consumer actually shops?
- **Are marketing budgets keeping pace** with consumer expectations for digital discovery and visualization?



The journey to purchase

Multiple channels, one decision path

Today's furniture shopper moves fluidly between digital and physical touchpoints. They may start with inspiration online, move to a configurator, validate in-store, and then finalize their purchase with the guidance of a salesperson.

Kitchen journey

Key moment	Stat	Retailer takeaway
Inspiration online	**76%** want to use a configurator in their next project	Position configurators prominently on websites
Planning & personalization	**93%** use tools to create layouts; **27%** say personalization triggered purchase	Personalization is a sales trigger, not a side feature
Validation in-store	**44%** use configurators in-store; salespeople remain pivotal	Train staff to leverage digital plans in consultations
Purchase decision	**67%** of consumers generate quotes via 3D planners	Digital + human collaboration accelerates close

Furniture journey (overall)

Key moment	Stat	Retailer takeaway
Online discovery	**63%** start online; **34%** expect to increase online shopping	Digital-first channels are essential for top-of-funnel
Configurator use	**50%** would buy a sofa from a brand offering a configurator	Configurators drive choice even in mid-ticket items
In-store reassurance	**85–90%** consult sales staff	Salespeople amplify digital experiences
Discounts & offers	**77%** prefer discounts offered by a salesperson	Human connection remains central to trust and loyalty

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Consumers do not necessarily want to use a configurator or planner on their own. Only 13% use it independently online. The majority prefer in-store assistance, making the configurator the salesperson's number one assistant.

Christophe Gazel, CEO, IPEA

The human element

Service and support remain paramount. While digital tools capture attention, salespeople provide the reassurance and guidance that close the sale.

Self-service does not diminish the human role. It elevates it, giving sales staff the ability to collaborate with better-prepared consumers and build stronger confidence in the purchase.

By equipping consumers with visualization tools upfront, retailers empower sales teams to guide conversations from an informed starting point.

The opportunity

Closing the gap between expectation and reality

Consumers and retailers agree on the importance of digital visualization — but the speed of adoption is uneven. **53%** of consumers say they would choose a brand that offers a 3D configurator over one that does not. The retailers we surveyed also echoed this belief. Yet, despite this alignment, digital often remains underfunded or siloed within IT, rather than being embraced as a core sales enabler.

This gap represents an opportunity: a chance for forward-thinking brands to lead the market. Those who act first will not only capture sales, but they will also reshape brand perception and market share.

The opportunity matrix

High customer expectations

Low tech readiness

Little or no investment in configurators, or tools siloed in IT without being accessible to customers or staff.

Opportunity zone

Leader zone

Risk zone

Emerging zone

High tech readiness

Configurators are embedded, visible, and actively used by consumers and salespeople to guide decisions.

Low customer expectations

This framework maps consumer expectations (high vs.low) against a retailer's tech capability. It highlights four possible positions.

The matrix shows where the gaps lie. The question for retailers is: are you investing in the areas that customers actually value?

Where do you stand?

See results on next page

The results

Opportunity zone

Consumers demand 3D tools; quick wins for early adopters; potential to leapfrog competition

Leader zone

Seamless omnichannel integration; 3D tools embedded in sales; first-mover advantage

Risk zone

Legacy mindset; IT-focused investments without customer impact; maintaining the status quo despite rising digital demand

Emerging zone

Tech investments are underway but not yet consumer-facing; positioned for growth if redirected

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Beyond tech: making digital work for sales

Retailers can unlock growth by:

- Treating 3D configurators as sales tools, not IT features.
- Reallocating marketing budgets toward consumer-facing digital experiences.
- Equipping sales teams to use configurators in collaboration with consumers.
- Starting with high-stakes categories like kitchens to build momentum across other rooms.

Conclusion and strategic outlook

A digital-first future, powered by human expertise

Furniture and kitchen retail's next chapter is being written by brands that **combine digital tools with human expertise.** Customers are already there: they're comfortable with technology, excited about new shopping experiences, and eager to **take an active role in their purchasing journey.** Instead of just upgrading back-office systems, retailers who invest in customer experiences will capture this shift first and see real revenue impact.

1. Age groups have distinct preferences
2. The customer journey is hybrid
3. Configurators are now essential
4. Personalization drives purchases
5. Service and support remain paramount

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1. Age groups have distinct preferences

- Younger consumers focus on functional furniture and rely on online research, but still want in-store guidance for their first major purchases.
- Consumers in their **30s** are the most digitally confident, actively using tools and AI to design and personalize.
- Those **50+** value style and the in-store experience, and are even willing to travel long distances for trusted retailers.

2. The customer journey is hybrid

- **63%** of consumers find inspiration online across all categories.
- **64%** expect their shopping behavior to change: half will lean further into online, half into in-store.
- Success depends on excelling in both spaces: inspire online, build credibility and trust in-store, and connect the two through web-to-store strategies.

3. Configurators are now essential

- **76%** of consumers are willing to use a configurator or room planner to design and personalize their next kitchen.
- More than half of U.S. consumers say they would buy a sofa from a brand that offers one.
- Retailers who highlight configurators in both online journeys and in the salesperson–customer relationship stand to gain the most.

4. Personalization drives purchases

- Combining 3D visualization with customization is a proven sales trigger.
- Around **27%** of kitchen buyers cite personalization via 3D tools as the factor that converted them.
- Across furniture, roughly **1 in 5** consumers are more likely to purchase when a customizable visualization is offered.

5. Service and support remain paramount

- **85–90%** of consumers consult sales staff for information and recommendations.
- **90%** of kitchen buyers rely on a salesperson for reassurance.
- Even discounts are more persuasive when offered by a salesperson **(77%)**, showing the enduring influence of human guidance.

The road ahead

American consumers are clear: **they want solutions that let them design and personalize, paired with the expertise of advisors who can validate their choices.** For retailers, the opportunity is to bring these elements together into a hybrid experience that inspires online, reassures in-store, and converts across both.

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"The future belongs to retailers who combine digital tools with human expertise, giving customers the freedom to explore and the confidence to buy.

Anu Ramani, MD, Isoline Communications

About HomeByMe

HomeByMe provides retailers with the solutions to close the gap between consumer expectations and shopping experiences.

3D planners and configurators let customers design, personalize, and visualize projects online and in-store.

Omnichannel experiences connect digital inspiration with in-store collaboration, helping advisors guide decisions and accelerate purchase.

Augmented reality features allow customers to see furniture scaled to their own space through a smartphone.

Global retailers in kitchens, furniture, and DIY use HomeByMe to build active connections with their customers and deliver engaging shopping experiences at every stage of the journey.

Discover more | Book a demo 〉

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About IPEA

The Institute for Analytics and Predictions in the Home Industry (IPEA) is Europe's leading specialist research body for the furnishings sector. Based in Paris, IPEA produces quantitative and forward-looking reports on furniture, home furnishings, and housing markets.

With decades of expertise and strong ties to manufacturers, retailers, and service providers, IPEA provides authoritative insights that shape industry understanding across Europe and beyond.

About Prodege

Prodege is a U.S.-based consumer marketing, polling, and insights platform that helps brands understand, reach, and grow audiences across digital channels. Through its suite of consumer loyalty and rewards properties, Prodege gathers deep behavioral and attitudinal data that supports market-level research and custom client surveys.

About Catalyse Research

Catalyse Research is a full-service fieldwork and market research agency with expertise in strategic research, recruitment, and data collection across global markets. Based in London and operating broadly, Catalyse provides rigorous respondent recruitment and high-integrity data collection, spanning both online and offline methods.