

INTERIOR DESIGN[®]

MARCH
2025

A man in a blue suit is walking from right to left in the foreground. Behind him is a large, vibrant, abstract mural with swirling lines in various colors (blue, green, red, orange, purple) and mathematical symbols like pi (π) and sigma (σ). The mural is set against a light-colored wall. In the foreground, there is a dark, textured stone wall with a wooden ledge on top. On the ledge, there are two small, dark, abstract sculptures. The overall scene is a modern art gallery or museum.

giants of design

100

giants

stability reigns

Welcome to the first installment of our 2025 Giants coverage, in which we spotlight the industry's 200 most lucrative firms, based on their reported interior design fees. Celebrating our 48th year of Giants research—and marking our sixth collaboration with sister brand ThinkLab analyzing the data—this issue goes beyond the top 100 and Rising Giants rankings to include detailed charts and graphs that summarize our latest survey findings. Throughout, you'll find project features from these industry leaders exclusively, alongside a high-level perspective on the challenges and opportunities shaping their practices. For deeper sector-specific analysis, including complete rankings for hospitality, healthcare, and sustainability leaders, watch for continued Giants coverage in our upcoming June/July issue.

So, we begin, as always, with the pinnacle of the profession: the top 100 Giants. These prominent firms had a big year, bringing in a record-setting \$6.3 billion in interior design fees, a 7 percent increase. Consider this: 2023 was the first time these firms ever crossed the \$5 billion threshold, making this latest milestone a clear sign of industry vitality. Also high is the number of firms who report being “very” or “extremely” confident in their predictions for the current calendar year, a signal of remarkable stability despite lingering economic uncertainty. Alas, for 2025, the 100 Giants are anticipating a slight decline—though they typically forecast downturns that ultimately get outpaced by actual results. (Just rewind to last March's Giants issue, in which the top 100 were bearish regarding 2024.)

Overall, the survey data paints a picture of sustained growth and diversification. Project tallies continue to climb, jumping from nearly 81,000 in 2023 to more than 83,000 in 2024—defying the Giants' 11 percent forecasted decline. While this increase is smaller than the previous year's jump, it is nonetheless a significant surge from the 2019 benchmark of 67,000. Project composition remains consistent: 48 percent new construction, 45 percent renovation, and 7 percent cosmetic refresh.

The most dynamic changes are occurring in the breakdown of projects and design fees by sector, revealing firms are continuing to diversify as they await the full recovery of the two most lucrative segments: hospitality (up 11 percent year-over-year but still down 13 from prepandemic days) and corporate office (down 5 percent YOY and 18 percent from 2019). Transportation, cultural, retail, and education verticals are thriving, each growing more than 20 percent. Transportation leads the pack with a remarkable 38 percent uptick—though this figure might be slightly inflated due to the massive scale of individual projects. For 2025, Giants predict growth in those same sectors as well as in residential, the other category still recovering from COVID impacts.

An interesting shift is emerging in fee allocation. Historically, construction has dominated project fees for the top 100 Giants, but 2024 marked a turning point: Furniture, fixtures, and equipment now claim 50 percent of project dollars—the first time this has occurred.

Regarding geographic trends, domestic markets, particularly the Southeast, continue to perform robustly and are expected to maintain momentum. Overseas work, however, was flat. The top three international regions remain unchanged: Europe, Asia, and Canada, which tend to swap places every year.

Fee per employee has returned to pre-COVID levels, billing rates have increased slightly, and the average amount of time billed to clients holds steady at 81 percent. Salaries, though, remained somewhat stagnant after last year's salary correction, with the biggest boost going to designers rather than to partners or project managers.

Staffing dynamics reveal intriguing trends. Leadership roles surged 18 percent, and design roles grew across the board. However, “other” interior design employees—librarians, assistants, BIM specialists, etc.—decreased by 26 percent, resulting in an overall 11 percent staff reduction, suggesting firms are still right-sizing. We debuted a new question in this year's survey, asking Giants to identify the nontraditional roles they're hiring for. Business development staffers, workplace strategists, and sustainability specialists are the most sought-after. Given that recruiting qualified candidates topped firms' list of persistent challenges, onboarding such talent is likely to be no small feat.

To recap, the commercial interior design industry shows resilient growth despite economic uncertainty, with firms adapting to postpandemic market dynamics. To navigate—and mitigate—sector-specific challenges, firms are diversifying across project types and prioritizing leadership and specialized roles. Giants, it seems, are strategically evolving.

Right: McDonald's corporate office, Hong Kong, by M Moser Associates [20].

GIANTS SNAPSHOT

2024 interior design fees

\$6.3B

\$104.3B

FF&C value

FF vs C

50/50

83,213
PROJECTS

See page 204 for methodology.

All research is conducted by ThinkLab, the research division of SANDOW Design Group.



RANKING 100giants

2025 RANK	FIRM headquarters / website	DESIGN FEES (in millions)	DESIGN STAFF	2024 RANK
1	GENSLER San Francisco / gensler.com	\$937.1	2,946	1
2	JACOBS Dallas / jacobs.com	\$339.1	1,269	2
3	PERKINS&WILL Chicago / perkinswill.com	\$335.2	982	3
4	AECOM Dallas / aecom.com	\$231.8	460	4
5	HKS Dallas / hksinc.com	\$220.5	150	5
6	HOK St. Louis / hok.com	\$188.6	339	7
7	CORGAN Dallas / corgan.com	\$179.5	400	6
8	HDR Omaha, NE / hdrinc.com	\$171.4	126	9
9	STANTEC Edmonton, Canada / stantec.com	\$162.4	236	11
10	CANNONDESIGN New York / cannondesign.com	\$153.0	-	12
11	IA INTERIOR ARCHITECTS San Francisco / interiorarchitects.com	\$150.5	476	8
12	SMITHGROUP Detroit / smithgroup.com	\$144.2	261	13
13	PAGE Washington / pagethink.com	\$137.4	749	10
14	HBA INTERNATIONAL Santa Monica, CA / hba.com	\$136.2	1,256	15
15	NELSON WORLDWIDE Minneapolis / nelsonworldwide.com	\$129.0	356	14
16	CBRE DESIGN COLLECTIVE Atlanta / cbre.com/services/design-and-build/design	\$117.0	538	16
17	ARCADIS Amsterdam / arcadis.com	\$105.3	344	25
18	PERKINS EASTMAN New York / perkinseastman.com	\$102.5	299	17
19	JLL DESIGN SOLUTIONS Chicago / jll.com	\$89.1	684	22
20	M MOSER ASSOCIATES Hong Kong / mmoser.com	\$84.9	782	18
21	ZGF ARCHITECTS Portland, OR / zgf.com	\$83.9	-	20
22	ROCKWELL GROUP New York / rockwellgroup.com	\$77.0	296	24
23	HGA Minneapolis / hga.com	\$76.9	111	21
24	NBBJ Seattle / nbbj.com	\$75.0	-	19
25	DLR GROUP Seattle / dlrgroup.com	\$67.4	1,115	26
26	FLAD ARCHITECTS Madison, WI / flad.com	\$60.9	305	23
27	PGAL Houston / pgal.com	\$57.4	224	32
28	WARE MALCOMB Irvine, CA / waremalcomb.com	\$55.0	302	27
29	LS3P ASSOCIATES Charleston, SC / ls3p.com	\$52.6	455	36
30	VOCON Cleveland / vocon.com	\$50.6	218	29
31	TPG ARCHITECTURE New York / tpgarchitecture.com	\$49.6	175	28
32	POPULOUS Kansas City, MO / populous.com	\$49.5	203	41
33	SKIDMORE, OWINGS & MERRILL New York / som.com	\$48.0	100	35
34	LITTLE DIVERSIFIED ARCHITECTURAL CONSULTING Charlotte, NC / littleonline.com	\$43.1	306	33
35	EWINGCOLE Philadelphia / ewingcole.com	\$42.9	138	31
36	E4H ENVIRONMENTS FOR HEALTH ARCHITECTURE Fort Worth, TX / e4harchitecture.com	\$41.0	118	34
37	STUDIOS ARCHITECTURE Washington / studios.com	\$39.9	197	30
38	ASDISKY Atlanta / asdisky.com	\$39.0	194	38
39	LEO A DALY Omaha, NE / leoadaly.com	\$38.1	197	37
40	HLW New York / hlw.com	\$38.0	130	39
41	SARGENTI ARCHITECTS Paramus, NJ / sargarch.com	\$37.3	97	43
42	HMC ARCHITECTS Ontario, CA / hmcarchitects.com	\$35.3	121	47
43	OTJ ARCHITECTS Washington / otj.com	\$34.0	175	40
44	TED MOUDIS ASSOCIATES New York / tedmoudis.com	\$33.0	80	42
45	MARC-MICHAELS INTERIOR DESIGN Winter Park, FL / marc-michaels.com	\$32.2	55	44
46	BUILDERS DESIGN Rockville, MD / buildersdesign.com	\$32.0	46	45
47	RSP ARCHITECTS Minneapolis / rsparch.com	\$29.6	72	46
48	LAWRENCE GROUP St. Louis / thelawrencegroup.com	\$29.2	94	56
49	HED Royal Oak, MI / hed.design	\$26.9	193	62
50	B+H Toronto / bharchitects.com	\$26.5	113	50

continued

"-" did not report data

RANKING 100giants

continuation

2025 RANK	FIRM	headquarters / website	DESIGN FEES (in millions)	DESIGN STAFF	2024 RANK
51	CDC DESIGNS	Costa Mesa, CA / cdcdesigns.com	\$25.0	45	51
52	BASKERVILL	Richmond, VA / baskervill.com	\$23.7	74	52
53	JCJ ARCHITECTURE	Hartford, CT / jcj.com	\$23.0	108	73
54	VIDA DESIGN	Portland, OR / vida-design.com	\$22.9	55	66
55	AVROKO	New York / avroko.com	\$22.4	120	57
56	TRIO	Denver / triodesign.com	\$21.5	51	49
57	NICOLEHOLLIS	San Francisco / nicolehollis.com	\$21.4	71	64
58	ZEBRA PROJECTS	London / zbr.global	\$21.1	217	61
59	CO ARCHITECTS	Los Angeles / coarchitects.com	\$21.0	85	55
60	MEYER DAVIS STUDIO	New York / meyerdavis.com	\$20.7	84	71
61	WIMBERLY INTERIORS	New York / wimberlyinteriors.com	\$19.7	153	54
62	MANCINI DUFFY	New York / mancinduffy.com	\$19.0	81	74
63	CHIPMAN DESIGN ARCHITECTURE	Des Plaines, IL / chipman-design.com	\$18.5	120	65
64	ROTTET STUDIO	New York / rottetstudio.com	\$18.5	56	67
65	HORD COPLAN MACHT	Baltimore, MD / hcm2.com	\$18.4	36	77
66	CBT	Boston / cbtarchitects.com	\$18.3	51	53
67	GRESHAM SMITH	Nashville, TN / greshamsmith.com	\$17.8	267	-
68	JPC ARCHITECTS	Bellevue, WA / jpcarchitects.com	\$17.6	48	79
69	THE SWITZER GROUP	New York / theswitzergroup.com	\$17.5	40	63
70	SAA INTERIORS + ARCHITECTURE	Los Angeles / saaia.com	\$17.4	83	60
71	NK ARCHITECTS	Morristown, NJ / nkarchitects.com	\$16.9	41	75
72	MKDA	New York / mkda.com	\$16.6	67	68
73	WORKSHOP/APD	New York / workshopapd.com	\$16.5	70	69
74	ICRAVE, A JOURNEY STUDIO	New York / journey.world	\$16.0	105	70
75	ELKUS MANFREDI ARCHITECTS	Boston / elkus-manfredi.com	\$15.1	121	48
76	FOGARTY FINGER	New York / fogartyfinger.com	\$15.1	109	78
77	SMMA	Cambridge, MA / smma.com	\$15.0	74	85
78	UNSCRIPTED INTERIOR DESIGN	Centennial, CO / unscriptedinteriors.com	\$14.7	29	87
79	STEELMAN PARTNERS	Las Vegas / steelmanpartners.com	\$14.1	128	118
80	CHAMPALIMAUD DESIGN	New York / champalimaud.design	\$14.0	44	59
81	RMW ARCHITECTURE & INTERIORS	San Francisco / rmw.com	\$13.4	59	-
82	BERGMEYER	Boston / bergmeyer.com	\$13.4	87	76
83	DESIGNAGENCY	Toronto / thedesignagency.ca	\$13.3	89	86
84	ENV	New York / env-team.com	\$13.3	79	108
85	HARTMAN DESIGN GROUP	Rockville, MD / hartmandesigngroup.com	\$13.3	20	92
86	RYAN YOUNG INTERIORS	National City, CA / ryanyounginteriors.com	\$13.2	42	88
87	J. BANKS DESIGN	Hilton Head Island, SC / jbanksdesign.com	\$13.1	29	140
88	DENTON HOUSE DESIGN STUDIO	Salt Lake City / dentonhouse.com	\$13.0	58	98
89	CHAMBERS	Baltimore / chambersusa.com	\$12.3	33	101
90	CID DESIGN GROUP	Naples, FL / cid-designgroup.com	\$12.1	44	90
91	BALLINGER	Philadelphia / ballinger.com	\$12.1	92	83
92	SPECTORGROUP	New York / spectorgroup.com	\$12.0	40	96
93	KASIAN ARCHITECTURE, INTERIOR DESIGN AND PLANNING	Vancouver, Canada / kasian.com	\$11.9	172	103
94	PIERRE-YVES ROCHON, PYR	Chicago / pyr-design.com	\$11.8	62	106
95	ANKROM MOISAN	Portland, OR / ankrommoisan.com	\$11.5	57	111
96	KENNETH PARK ARCHITECTS	New York / kennethpark.com	\$11.4	28	-
97	THE GETTYS GROUP	Chicago / gettys.com	\$11.2	61	91
98	RAPT STUDIO	San Francisco / raptstudio.com	\$11.2	35	94
99	TRICARICO ARCHITECTURE + DESIGN	Wayne, NJ / tricarico.com	\$11.1	21	100
100	KCCT	Washington / kcct.com	\$10.9	56	127

RANKING INTERNATIONAL giants

2025 RANK	FIRM headquarters / website	DESIGN FEES (in millions)
1	SUZHOU GOLD MANTIS CONSTRUCTION DECORATION CO. China	\$88.9
2	YANG & ASSOCIATES GROUP China / en.yanghd.com	\$54.0
3	SPACE MATRIX Singapore / spacematrix.com	\$50.0
4	DSP DESIGN ASSOCIATES India / dspdesign.co	\$39.0
5	ENVISIONE STUDIO LIMITED Hong Kong / envisionestudio.com	\$34.8
6	ZYETA India / zyeta.com	\$34.4
7	KRISTINA ZANIC CONSULTANTS United Arab Emirates / kristinazanic.com	\$15.5
8	BLINK DESIGN GROUP Singapore / blinkdg.com	\$11.6
9	STUDIO DADO U.S. / studiodado.com	\$10.1
10	MIXD DESIGN Poland / mixd.io	\$1.1

Note: Firms based outside the U.S. who don't operate a North American office and/or generate less than 25 percent of interior design fee income in North America are ranked here instead of in the main listings.



The Beijing office of Youku Shengshi, by Space Matrix [3].

SPACE MATRIX

TOP TEN

giants by sector

office

Gensler	\$330.9
CBRE Design Collective	\$96.0
IA Interior Architects	\$88.6
Perkins&Will	\$87.2
M Moser Associates	\$84.9
JLL Design Solutions	\$58.5
AECOM	\$48.7
Corgan	\$39.9
NELSON Worldwide	\$35.2
Arcadis	\$35.0

retail

Gensler	\$66.1
Arcadis	\$46.7
NELSON Worldwide	\$21.9
JLL Design Solutions	\$18.2
Sargenti Architects	\$17.7
Ware Malcomb	\$16.6
TPG Architecture	\$14.7
RSP Architects	\$12.0
Kenneth Park Architects	\$11.4
Little Diversified Architectural Consulting	\$10.0

government

Gensler	\$172.1
Jacobs	\$108.0
HOK	\$39.2
Page	\$29.9
NELSON Worldwide	\$26.7
Perkins&Will	\$23.9
HDR	\$13.3
DLR Group	\$11.7
Skidmore, Owings & Merrill	\$10.6
KCCT	\$10.1

healthcare

HKS	\$113.1
Perkins&Will	\$112.5
HDR	\$99.4
CannonDesign	\$95.0
SmithGroup	\$52.9
Stantec	\$50.0
Perkins Eastman	\$40.2
E4H Environments for Health Architecture	\$38.9
Gensler	\$37.4
Page	\$37.3

hospitality

HBA	\$126.6
Gensler	\$44.2
Rockwell Group	\$40.0
HKS	\$27.3
Jacobs	\$27.1
AvroKO	\$20.7
DLR Group	\$20.3
Perkins Eastman	\$19.1
Populous	\$18.9
JCJ Architecture	\$18.6

residential

Builders Design	\$32.0
Marc-Michaels Interior Design	\$31.2
CDC Designs	\$25.0
Vida Design	\$20.8
NICOLEHOLLIS	\$19.2
Rockwell Group	\$15.1
Unscripted Interior Design	\$14.7
TRIO	\$14.3
Workshop/APD	\$13.5
Hartman Design Group	\$13.3

cultural + sports center

Gensler	\$65.8
Populous	\$30.6
HOK	\$26.5
HKS	\$21.1
Perkins&Will	\$20.9
AECOM	\$16.2
Jacobs	\$15.6
EwingCole	\$9.8
Stantec	\$9.3
HGA	\$8.1

transportation

Gensler	\$93.1
Corgan	\$57.3
PGAL	\$36.7
HOK	\$26.9
AECOM	\$18.5
Jacobs	\$17.1
ZGF Architects	\$15.7
Page	\$14.3
Perkins&Will	\$12.6
Stantec	\$10.9

education

CannonDesign	\$39.0
Gensler	\$36.1
Perkins&Will	\$34.5
Corgan	\$32.7
DLR Group	\$27.9
Page	\$26.3
LS3P Associates	\$26.1
Arcadis	\$17.3
HMC Architects	\$16.8
Flad Architects	\$12.8

Ranking is determined by total design-fee earnings across the vertical.

All dollar amounts are in millions.

See the June/July 2025 issue of Interior Design for the full Hospitality, Healthcare, and Sustainability Giants rankings.

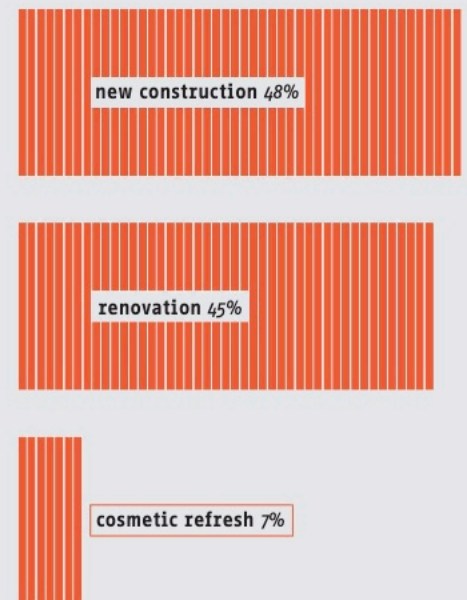
firms with the most design fee growth (in millions)



segment income and number of projects worked on

segment	fees (in millions)		projects	
	2024 actual	2025 forecast	2024 actual	2025 forecast
Corporate workplace	\$1,538.1	\$1,478.5	26,981	26,038
Healthcare	\$1,004.7	\$806.7	9,376	7,995
Hospitality/restaurant	\$616.4	\$618.1	7,230	7,764
Government/civic	\$595.1	\$499.0	3,098	2,251
Education	\$466.3	\$402.0	5,091	4,872
Life sciences	\$341.7	\$320.1	2,834	2,856
Transportation	\$339.5	\$325.9	2,143	1,874
Residential	\$325.3	\$357.8	3,965	3,969
Retail	\$307.6	\$319.4	10,572	11,194
Cultural + sports center	\$273.2	\$206.7	1,945	1,276
Data centers	\$163.5	\$144.0	1,222	1,027
Mixed-use	\$143.7	\$159.7	2,091	1,871
Manufacturing + other	\$141.2	\$120.5	4,714	4,411
Senior living	\$41.4	\$35.6	1,951	1,957

projects by type



SQUARE-FOOTAGE TRENDS

Across sectors, Giants are observing a move toward more efficient use of space, with greater emphasis on adaptability, quality of experience, and intentional design. While some sectors, notably corporate, are reducing square footage, they're often investing more per square foot to create multifunctional spaces with an emphasis on future flexibility and technology integration. While corporate footprints continue to shrink thanks to the enduring appeal of hybrid methodologies, some report that space per work point (if not per employee) is starting to rise. Another cross-sector trend is the prioritization of well-being, which is translating to increased square footage for patient comfort in healthcare settings and more expansive wellness amenities in hospitality and education environments.

100 giants

most admired firms



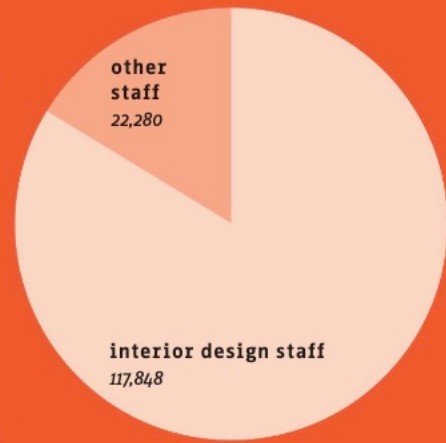
staffing information

level	staff totals	median hourly rate	median salary
Principals/partners	2,546	\$300	\$206,500
Project managers/directors	5,134	\$220	\$141,000
Designers	11,262	\$160	\$90,000
Other ID staff	3,338	\$125	\$75,000

Giants are implementing strategic shifts to gain a competitive edge and address clients' increasingly complex needs. Firms are pursuing diversification through channels including geographic expansion, new practice areas, and broader sector focus (with hospitality emerging as a trending vertical). They're increasingly integrating digital solutions into their operations, from advanced BIM processes to AI tools, all aimed at streamlining project delivery and ensuring spatial solutions align with clients' business objectives. Many are establishing specialized studios for services like branding, acoustic design, and sustainability analysis. Another trend: extending their involvement across the project timeline by offering pre-design services, workplace strategy, change management, and post-occupancy support. This shift toward comprehensive, cross-collaborative services reflects a broader trend of vertical integration, allowing firms to provide more value in an ever evolving market.

EXPANDING TO MEET EVOLVING MARKET DEMANDS

total employees 140,128



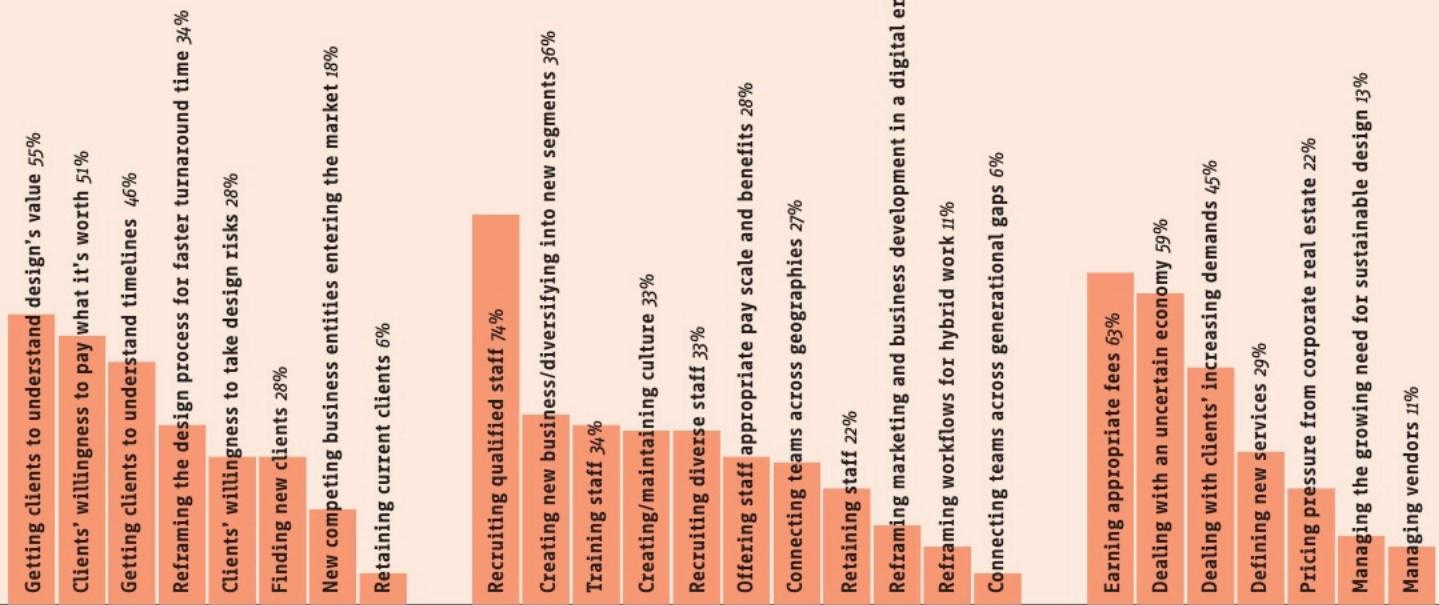
domestic vs overseas project breakdown

u.s. 86%
international 14%

international project locations

Europe	65%
Asia/Pacific Rim	61%
Canada	53%
Caribbean	39%
Mexico	30%
Central/South America	23%
Africa	18%
Other	29%

percentage of firms reporting these as their primary challenges



client issues

practice issues

business issues

100giants

percentage of billable time	
< 70%	12%
70-79%	22%
80-89%	41%
90-99%	22%
100%	2%
average	81%

In 2025, commercial interior design firms anticipate hiring for several specialized roles beyond traditional design positions. The most sought-after new employees are business development managers (40% of firms are actively seeking them); sustainability specialists and materials experts; workplace strategists to help navigate the evolution of hybrid and flexible work models; and technologists, including analysts and VR/AR/AI experts who can provide data-driven insights to inform design solutions. Also being recruited are design futurists, as firms are looking for talent to predict trends and guide long-term strategic planning. This shift in hiring priorities reflects the growing need for interdisciplinary expertise within the interior design field.

HIRING FOR EMERGING ROLES

percentage of firms recruiting these nontraditional roles

