

## a very happy new year

**When was the last time** someone said to you, “I have some good news, and I have... some more good news?” Well, hey. That’s what *Interior Design’s* top 100 Giants are saying. The statistics speak for themselves.

If you like really big numbers, here are some. Total design fees, which have seen a steady climb since 2010, hit \$3 billion, topping the Giants’ own forecast from a year ago by 10 percent. Corporate offices remain the biggest generator, at 36 percent of fees, and hospitality, number two, rose slightly, to 18 percent. Coming in third, at 14 percent, health care/assisted living actually fell a bit. Residential and retail both saw significant gains for a combined 10 percent. For 2014, the Giants predict that the hot zones will be education, retail, and hospitality. Total square footage installed was 877 million. That beat the Giants’ forecast by 21 percent. The total number of projects also exploded, from 34,000 to 49,500, which meant specifying fixtures, furnishings, and construction products to the tune of \$69 billion, with \$20 billion of that for interiors.

The sustainability movement remains an interesting phenomenon. Green jobs still generate half of all fees, but LEED-accredited staffers dropped from 35 percent to 31. So it seems that fewer designers are producing more green square footage (55 percent) with more green products (62 percent).

On the globalization front, growth seems to have stabilized. Giants report 24 percent of all work taking place overseas, a number that has held steady for three years. The U.S. generated 90 percent of business for 50 firms, and 84 firms see potential especially in the Northeast, South, and West. Only 19 firms say that 50 percent or more work comes from international sources.

When Giants do go global, however, a long-haul flight is usually involved. Up from 46 percent, 58 worked in the Middle East, and 46 percent, up from 37, worked in Central and South America. Asia attracted 82

percent. As far as predicted growth, China is still champ—46 percent say so. But 28 percent see the United Arab Emirates heating up, and 65 percent more firms think the Middle East in general will see more growth. Europe could also improve, 27 percent predict.

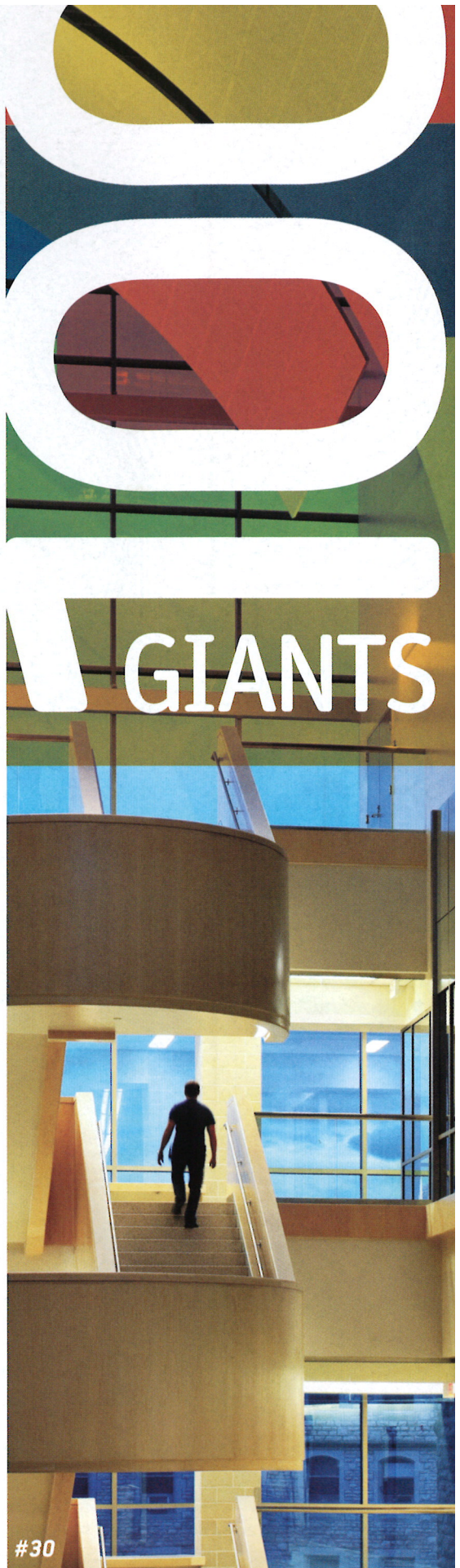
Back at headquarters, someone has to do all this great work. In 2013, the Giants employed roughly 13,500 designers, up 13 percent from 2012 and up a whopping 55 since 2009. Designers make up a higher percentage of the work force, too, at 51—a big jump after hovering at about 45 percent. Even better news: Giants want to add 1,300 designers in 2014.

Average fees generated per employee at the “designer” level remained steady at about \$221,000. Meanwhile, the hourly billing rate for a designer has risen slowly to come in at \$130, up from \$115 two years prior. In the same period, hourly billing rose from \$157 to \$178 for managers and from \$200 to \$240 for partners. Yet designer salaries dropped 3 percent, to \$67,000, while manager and partner salaries held at \$100,000 and \$160,000, respectively.

Increasing head count is a major issue, according to 78 percent—only 70 said the same last time. Responses to other staffing queries are trending in the same direction. Retaining staff is a concern for 36 percent, up from 29, and 39 percent say staff training is crucial, up from 33. When business is robust, it’s only natural that firms worry more about getting the work done than they do about getting the work. The percentage of firms anxious about finding new clients went down from 52 to 44. In fact, nearly three out of four firms gave “earning appropriate fees” greater importance than “fear about the economy.”

*Optimism* really seems to be the operative word. And no wonder, what with 72 firms reporting increased earnings. (Only 21 could say the same for 2009.) All of which is stellar. But we saved the best stat for last. Of the top 100 Giants, 95 say that 2014 “will be better for our business.” That’s the highest score recorded since we started asking, four years ago. —Mike Zimmerman

*Flad Architects designed the University of Saskatchewan's Academic Health Science wing in Saskatoon, Canada.*



# 100 GIANTS

| RANK<br>2014 | FIRM (HEADQUARTERS   WEB SITE)                                       | WORK INSTALLED            |                     |                       | DESIGN<br>STAFF | RANK<br>2013 |
|--------------|--|---------------------------|---------------------|-----------------------|-----------------|--------------|
|              |  | DESIGN FEES<br>(MILLIONS) | VALUE<br>(MILLIONS) | SQ. FT.<br>(MILLIONS) |                 |              |
| 1            | Gensler (SAN FRANCISCO   gensler.com)                                | \$453.440                 | \$1,600.000         | 64.00                 | 1,545           | 1            |
| 2            | Jacobs (PASADENA, CA   jacobs.com)                                   | \$123.760                 | \$2,227.685         | 24.75                 | 483             | 2            |
| 3            | Perkins + Will (CHICAGO   perkinswill.com)                           | \$104.000                 | \$4,600.000         | 31.50                 | 351             | 4            |
| 4            | HBA (LOS ANGELES   hba.com)  | \$101.208                 | \$6,072.480         | 57.83                 | 1,172           | 5            |
| 5            | HOK (ST. LOUIS   hok.com)  | \$99.300                  | \$3,251.000         | 36.67                 | 283             | 3            |
| 6            | Callison (SEATTLE   callison.com)                                    | \$74.060                  | NR                  | NR                    | 293             | 8            |
| 7            | IA Interior Architects (SAN FRANCISCO   interiorarchitects.com)      | \$73.312                  | \$1,400.010         | 25.79                 | 301             | 9            |
| 8            | Stantec (EDMONTON, CANADA   stantec.com)                             | \$71.200                  | \$900.000           | 7.63                  | 300             | --           |
| 9            | Leo A Daly (OMAHA   leoadaly.com)                                    | \$67.309                  | NR                  | NR                    | 199             | 7            |
| 10           | Cannon Design (CHICAGO   cannondesign.com)                           | \$62.000                  | NR                  | 20.00                 | 191             | 6            |
| 11           | Skidmore, Owings & Merrill (NEW YORK   som.com)                      | \$58.134                  | NR                  | NR                    | 130             | 19           |
| 12           | HKS (DALLAS   hksinc.com)  | \$58.050                  | NR                  | NR                    | 250             | 12           |
| 13           | Nelson (PHILADELPHIA   nelsononline.com)                             | \$56.720                  | NR                  | 28.90                 | 170             | 11           |
| 14           | NBBJ (SEATTLE   nbbj.com)  | \$56.548                  | NR                  | NR                    | 202             | 10           |
| 15           | Areen Design Services (LONDON   areen.com)                           | \$48.860                  | \$350.000           | 31.25                 | 179             | --           |
| 16           | CCD/Cheng Chung Design (HK) (HONG KONG   ccd.com.hk)                 | \$48.500                  | \$186.500           | 3.71                  | 393             | 15           |
| 17           | AECOM (LOS ANGELES   aecom.com)                                      | \$48.000                  | \$1,705.000         | 15.00                 | 153             | 13           |
| 18           | Wilson Associates (DALLAS   wilsonassociates.com)                    | \$47.000                  | \$3,000.000         | NR                    | 365             | 14           |
| 19           | Perkins Eastman (NEW YORK   perkinseastman.com)                      | \$46.400                  | \$925.000           | 5.02                  | 209             | 16           |
| 20           | M Moser Associates (HONG KONG   mmoser.com)                          | \$43.729                  | \$255.176           | 6.78                  | 538             | 30           |
| 21           | SmithGroupJJR (DETROIT   smithgroupj jr.com)                         | \$41.400                  | NR                  | NR                    | 158             | 17           |
| 22           | HDR Architecture (OMAHA   hdrinc.com)                                | \$34.800                  | NR                  | NR                    | 175             | 20           |
| 23           | Page (HOUSTON   pspaec.com)  | \$34.000                  | NR                  | NR                    | 94              | 18           |
| 24           | Peter Marino Architect (NEW YORK   petermarinoarchitect.com)         | \$32.001                  | NR                  | NR                    | 121             | 21           |
| 25           | HGA Architects and Engineers (MINNEAPOLIS   hga.com)                 | \$32.000                  | NR                  | NR                    | 45              | --           |
| 26           | TPG Architecture (NEW YORK   tpgarchitecture.com)                    | \$30.339                  | NR                  | NR                    | 183             | 24           |
| 27           | HLW International (NEW YORK   hlw.com)                               | \$29.200                  | \$775.000           | NR                    | 73              | 23           |
| 28           | DLR Group (OMAHA   dlrgroup.com)                                     | \$28.600                  | NR                  | NR                    | 133             | 25           |
| 29           | Rockwell Group (NEW YORK   rockwellgroup.com)                        | \$28.408                  | NR                  | NR                    | 109             | 27           |
| 30           | Flad Architects (MADISON, WI   flad.com)                             | \$27.225                  | \$1,056.600         | 8.81                  | 163             | 32           |
| 31           | ZGF Architects (PORTLAND, OR   zgf.com)                              | \$27.000                  | \$1,090.284         | 3.76                  | 55              | 31           |
| 32           | Ted Moudis Associates (NEW YORK   tedmoudis.com)                     | \$27.000                  | \$275.000           | 6.00                  | 78              | 34           |
| 33           | EwingCole (PHILADELPHIA   ewingcole.com)                             | \$26.800                  | \$450.000           | 2.85                  | 120             | 26           |
| 34           | Vocon (CLEVELAND   vocon.com)  | \$26.790                  | \$441.750           | 4.42                  | 116             | 40           |
| 35           | VOA Associates (CHICAGO   voa.com)                                   | \$25.036                  | \$93.500            | 22.50                 | 101             | 41           |
| 36           | Corgan Associates (DALLAS   corgan.com)                              | \$24.500                  | \$870.000           | 9.00                  | 66              | 33           |
| 37           | Bilkey Llinas Design (PALM BEACH GARDENS, FL   bilkeyllinas.com)     | \$23.785                  | NR                  | NR                    | 116             | 29           |
| 38           | FRCH Design Worldwide (CINCINNATI   frch.com)                        | \$23.600                  | NR                  | NR                    | 48              | 36           |
| 39           | Space Matrix Design Consultants (SINGAPORE   spacematrix.com)        | \$23.160                  | \$240.000           | 6.08                  | 375             | 28           |
| 40           | Studios Architecture (WASHINGTON   studios.com)                      | \$22.956                  | \$182.000           | 9.75                  | 202             | 35           |
| 41           | Little (CHARLOTTE, NC   littleonline.com)                            | \$21.460                  | \$297.000           | 7.75                  | 155             | 42           |
| 42           | Fentress Architects (DENVER   fentressarchitects.com)                | \$20.250                  | NR                  | 6.20                  | 13              | 22           |
| 43           | Yabu Pushelberg (TORONTO   yabupushelberg.com)                       | \$20.000                  | NR                  | NR                    | 95              | 38           |
| 44           | HMC Architects (LOS ANGELES   hmcarchitects.com)                     | \$18.022                  | NR                  | NR                    | 44              | 63           |
| 45           | Shepley Bulfinch (BOSTON   shepleybulfinch.com)                      | \$17.774                  | \$177.744           | 0.87                  | 13              | 39           |
| 46           | CDC Designs (COSTA MESA, CA   cdcdesigns.com)                        | \$16.541                  | \$10.360            | NR                    | 45              | 59           |
| 47           | CBT Architects (BOSTON   cbtarchitects.com)                          | \$16.100                  | NR                  | 5.40                  | 40              | 48           |
| 48           | ASD (ATLANTA   asdnet.com)   | \$16.000                  | NR                  | NR                    | 96              | 45           |
| 49           | Checkland Kindleysides (LEICESTER, U.K.   checklandkindleysides.com) | \$15.816                  | NR                  | NR                    | 72              | 43           |
| 50           | Marc-Michaels Interior Design (WINTER PARK, FL   marc-michaels.com)  | \$15.700                  | \$19.200            | NR                    | 39              | 47           |
| 51           | Daroff Design/DDI Architects (PHILADELPHIA   daroffdesign.com)       | \$14.200                  | \$400.000           | 3.00                  | 45              | 46           |
| 52           | Ware Malcomb (IRVINE, CA   waremalcomb.com)                          | \$14.000                  | \$630.000           | 7.00                  | 50              | 56           |
| 53           | RSP Architects (MINNEAPOLIS   rsparch.com)                           | \$14.000                  | \$350.000           | 5.50                  | 63              | 66           |
| 54           | PDR (HOUSTON   pdrcorp.com)  | \$13.464                  | \$551.000           | 5.25                  | 83              | 68           |
| 55           | Elkus Manfredi Architects (BOSTON   elkus-manfredi.com)              | \$13.280                  | NR                  | 2.49                  | 65              | 51           |