Portrait of Montréal Design and Architecture Professionals and Firms
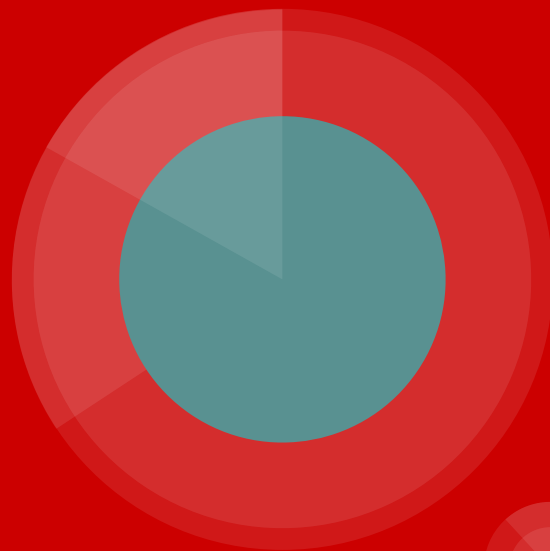
Design Montréal Census
1st edition, 2019–2020

Introduction
Getting the first true portrait

The first Design Montréal Census was a large-scale operation conducted in 2019–2020 by the Bureau du design, part of Montréal's Economic Development department, and the firm MCE Conseils, in partnership with the Institut du Nouveau Monde and Québec's professional associations in design and architecture.

The resulting study report constitutes the first true global portrait of Montréal's design and architecture professionals, along with the firms and organizations that direct or employ them. It shows that Montréal, named a UNESCO City of Design in 2006, is a fertile environment for their prosperity.

Montréal is overrepresented compared with Québec as a whole, which speaks to the importance of this industry segment as a differentiating element and asset for the metropolis.

A particular context

The context in which the following data were gathered is very different from that of the economic and social crisis that is prevailing as we publish the results of our study.

This snapshot is therefore a historical marker, depicting the pre-COVID-19 situation. Gauging its impact over time—for example when the next Design Montréal Census is taken in 2024—will be a worthwhile exercise to assess the resilience of the individuals and businesses that make up this Montréal business ecosystem.

Methodology
Profiles sought and surveyed for

This study involves both **professionals** and **firms**. The latter fall into two categories:

1. **Specialized** companies whose primary concern is the provision of design and architecture services.

2. **Non-specialized** companies, which make use of design and/or architecture in their development, but whose primary concern is in another area. These firms have at least one professional trained in or working in design and/or architecture on staff.

Methodology
Stages

The consultation process involved five stages:

1. A questionnaire and meetings with Québec associations of design and architecture professionals;
2. An operation consisting of observation, identification and a "head count" of design and architecture professionals and companies;
3. A survey of design and architecture professionals;
4. A survey of the specialized and non-specialized companies and organizations; and
5. Two focus groups comprising professionals and heads of design and architecture firms.

The head-count stage took place from February to October 2019, while the online surveys and in-person meetings with the target groups were conducted between August 2019 and February 2020.

The design and architecture disciplines

While not limited thereto, the design and architecture disciplines considered in this study consist mainly of the following:

Architecture and landscape architecture, event design, interior design, planning and spatial design, fashion design, service design, experience design, exhibition design, graphic design, digital interface / user experience design, industrial design, environmental design, product design, and urban design.

Highlights of the survey of design and architecture professionals in Montréal

- Individuals employed by firms and active self-employed people living on the Island of Montréal.

- Graduates of programs in one of the design/architecture disciplines or with experience and skills gained through various training and work experiences.

- Holding various roles and exercising various functions ranging from design to management and supervision, as well as teaching, sales and representation.

19,255

There were 19,255 professionals and technicians across all design and architecture disciplines living and working on the Island of Montréal in 2016, which amounted to 34% of that workforce in Québec. Graphic designers, illustrators and graphic design technicians made up the largest segment: 46% of the design and architecture professionals and technicians in the Montréal agglomeration.

Overall gender balance, but with significant gaps in certain professions
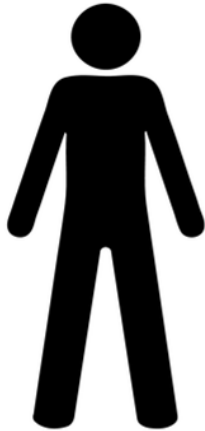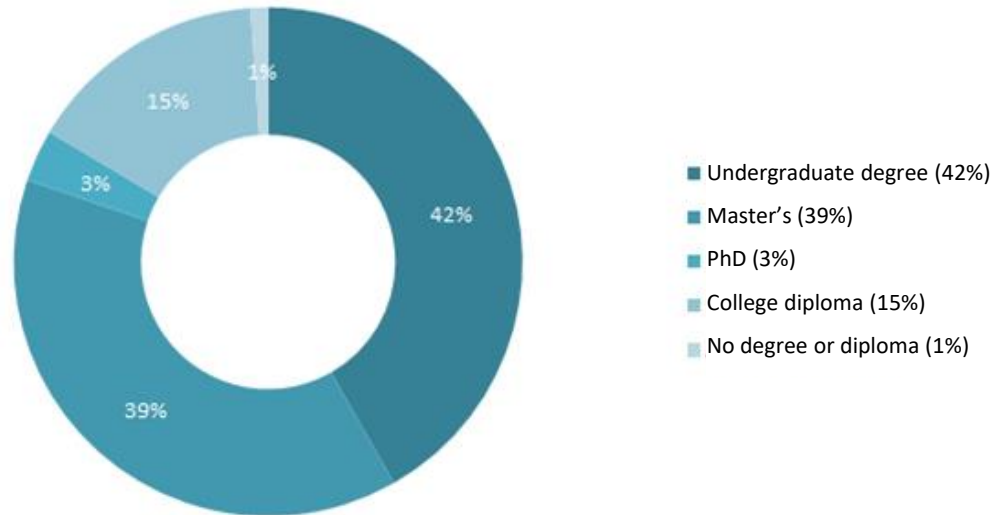
54.3%   45.8%

The profession of **interior designer** is that comprising the most women (69.2%). Conversely, the most male profession is that of **industrial designer** (65.3%).

Three-quarters of design and architecture professionals are university graduates

Undergraduate degree (42%)

Master's (39%)

PhD (3%)

College diploma (15%)

No degree or diploma (1%)

80%

A significant majority of Montréal designers and architects say they are satisfied with their working conditions and employment benefits, as well as with the degree of autonomy and diversity of tasks associated with their work. Most follow a regular work schedule, Monday to Friday. They are particularly appreciative of the location of their workplace, in Montréal.

About the diversity of tasks. . .

Words used by respondents to describe it.

20% of design and architecture professionals live or work in the Plateau Mont-Royal borough
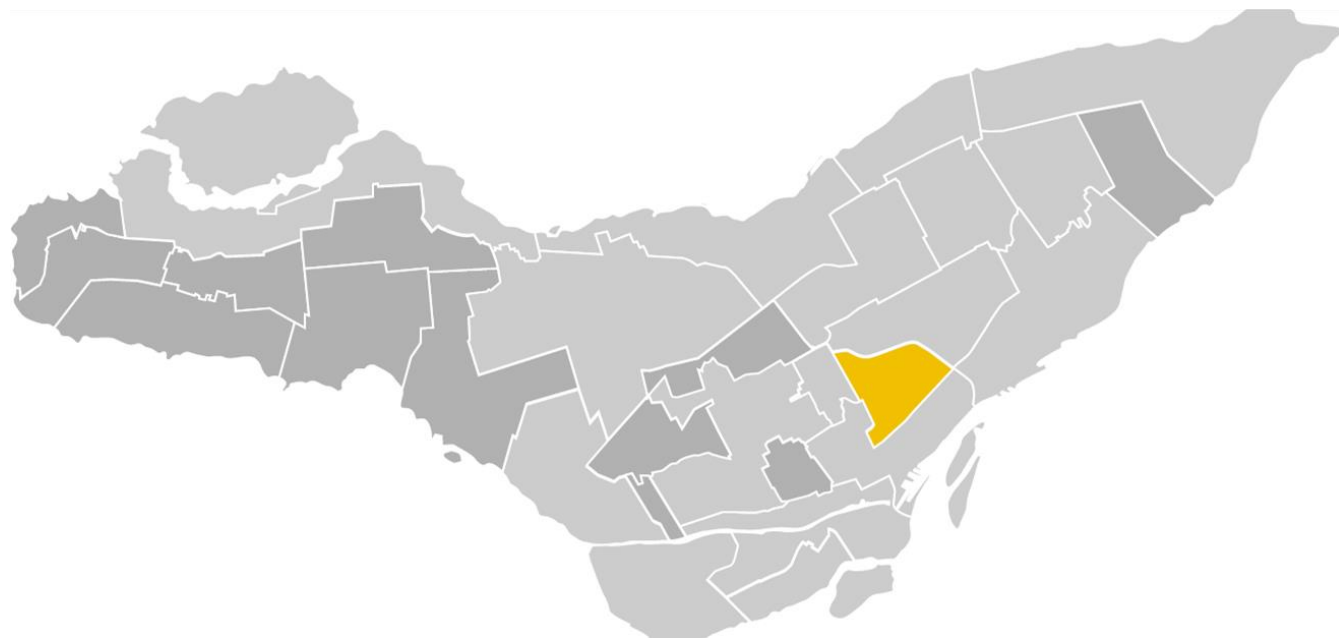
Place of residence:
Plateau Mont-Royal (19.5%)
Rosemont–La Petite-Patrie (18.5%)
Villeray–Saint-Michel–
Parc Extension (10.5%)
Mercier–Hochelaga-Maisonneuve
(10.4%)

Place of work:
Plateau Mont-Royal (19.6%)
Ville-Marie (16.7%)
Sud-Ouest (15.2%)
Rosemont–La Petite-Patrie (14.5%)

Source: 2019–20 Design Montréal Census, N=667, compilation by MCE Conseils.

$44,404

This is the average annual income of design and architecture professionals in the Census Metropolitan Area (CMA) (1). On the Island of Montréal, the peak distribution is between $45,000 and $60,000 (2).

60% of Montréal's design and architecture professionals are salaried employees
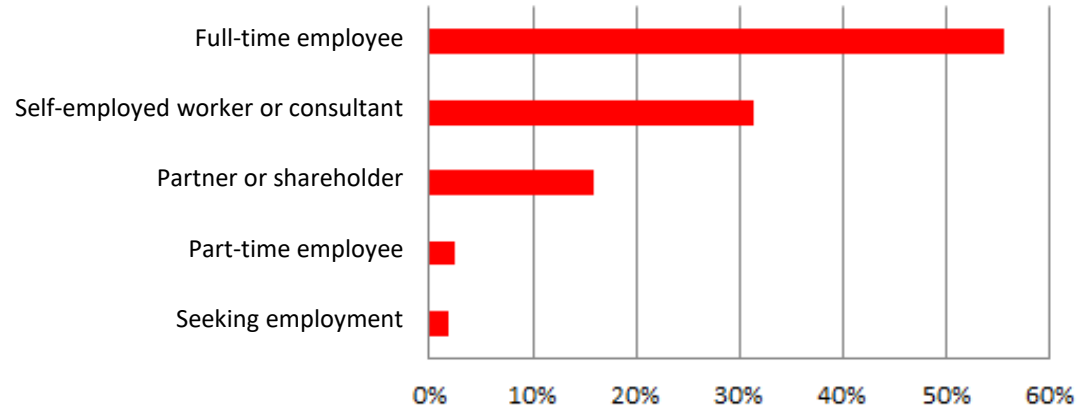
Chart showing distribution of employment types:
- Full-time employee: ~56%
- Self-employed worker or consultant: ~31%
- Partner or shareholder: ~16%
- Part-time employee: ~3%
- Seeking employment: ~2%

(X-axis: 0% 10% 20% 30% 40% 50% 60%)

The majority of design and architecture professionals work in the professional services sector

Sector	Percentage
Public administration (municipality, government) (8%)	
Arts, entertainment and leisure (5%)	
Other (5%)	
Retail and wholesale trade (5%)	
Construction (5%)	
Industrial or artisanal manufacturing (6)	
Finance and insurance (1%)	
Information industry and arts & culture industry (2%)	
Fashion, clothing and accessories (1%)	
Advertising, communications, media (2%)	
Teaching services (3%)	
Professional, scientific and technical services (56%)	
Transportation and storage (1%)	

6,609 jobs are held by design and architecture professionals in Montréal

3,526 jobs in establishments providing architecture services

Legend:
- Industrial design
- Graphic design
- Interior design
- Landscape architecture
- Architecture
- Other

Pie chart values: 5%, 5%, 19%, 10%, 6%, 55%

Montréal designers and architects earn, on average, 5% more than those elsewhere in Québec

$36.93

Average hourly **wage** of employees

$67.77

Average hourly **rate** of self-employed workers
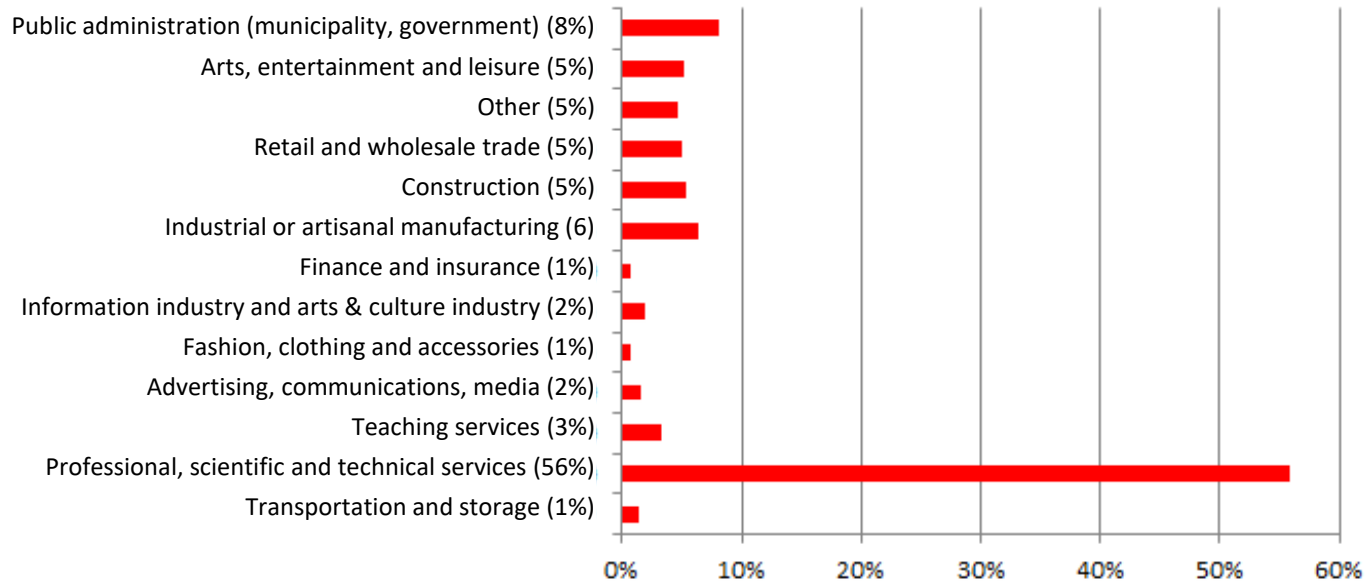
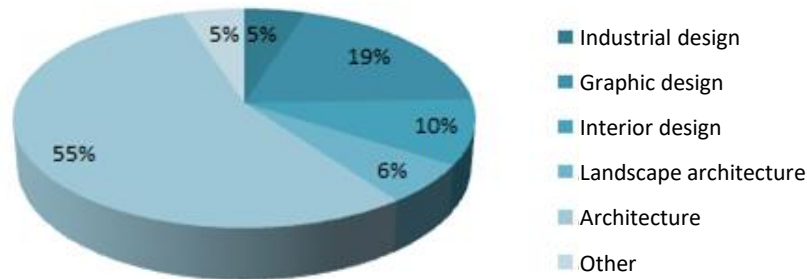Sources: (1) Statistics Canada, 2016 Canadian Census, (2) 2019–20 Design Montréal Census, N=678, compilation by MCE Conseils.
Note: Data per discipline are also available.

Young design and architecture professionals play an important role

25%

of Montréal designers and architects are aged between 25 and 34

48%

are aged between 25 and 44

Except for **landscape architecture**, the biggest age group in all of the design and architecture professions is 25 to 34.

Urban planning and **graphic design** are the groups with the youngest professionals.

The number of professionals grew from 2010 to 2015, but there were fewer technicians

+14.2%

Increase from 2010 to 2015 in the number of professionals

(graphic designers, interior designers, industrial designers, fashion designers, architects, landscape architects, planners)

-2.1%

Decrease from 2010 to 2015 in the number of technicians and technologists

(graphic design technicians, architectural illustrators, landscape design technicians)

Highlights of the survey of Montréal firms and organizations specialized in design and architecture

Companies whose primary concern is the provision of design and architecture services.

3,283

This is the number of companies established in Montréal that are highly likely to include design and architecture professionals in their ranks; 768 definitely do, as they are direct providers of design or architectural services. A total of 26,172 other companies operate in industry segments where one or more design and architecture professionals may be involved. The presence of these professionals can depend on multiple factors, such as the company's business model and size, its strategy with respect to subcontracting, the market it serves, etc.).

A business ecosystem comprising very small firms

89% of design and architecture firms have fewer than 35 employees.

Half of them have annual sales of less than $500,000.

The client base for design and architecture firms is mainly local

Share of business of firms by source-market geographic origin

(average of last three fiscal years)

- Montréal
- Elsewhere in Québec
- Elsewhere in Canada
- U.S.
- Europe
- Asia
- Elsewhere in the world
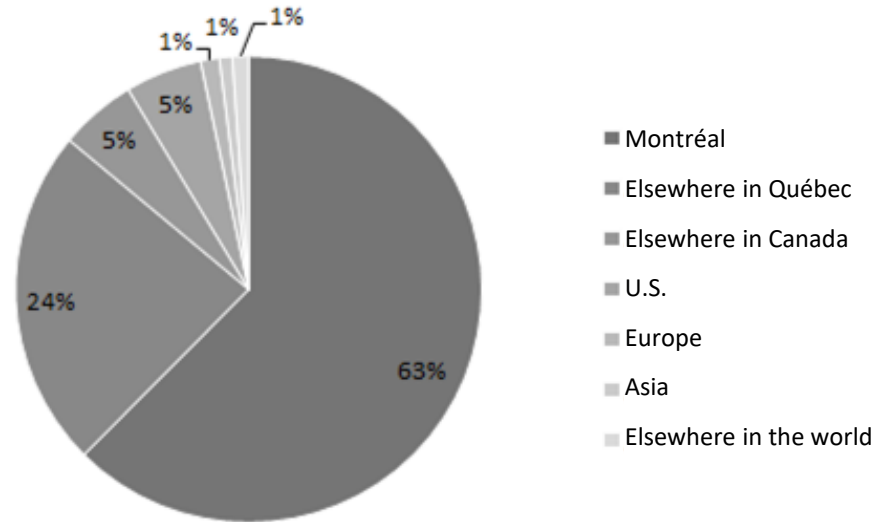
$1.5 billion

From 2012 to 2018, design firms' income grew by 13.4%, while architecture services posted market growth of 17.03%. Québec companies in the two segments together generated operating income of close to $1.5 billion in 2018.

26.7%

In 2017, profit margins for design services in Québec averaged 26.7%, compared with 23.6% in Canada. Not only is the sector growing, but profitability appears to be increasing as well.

Public commissions appear to be decisive for the financial health of businesses specialized in design and architecture

27% of design and architecture firms' income is from service agreements with the public sector

65%
report that they have previously replied to public calls for tenders or requests for proposals.

Those that do respond to an average of 15 calls for tenders or RFPs per year.

Access to public commissions (calls for tenders)

Considered a major challenge by 17% of all professionals, more specifically for:

26% of architects
26% of landscape architects
18% of industrial designers
14% of interior designers
12% of graphic designers
3% of fashion designers

Main difficulties or reluctance:

1. Lowest bidder preference
2. Cumbersome and complex process
3. Investment in time and money
4. Lack of clarity and consistence of documents

Source: 2019–20 Design Montréal Census (N=631), compilation by MCE Conseils.
Note: Data per discipline are also available.

Design and architecture competitions are a way to access public contracts

72% of respondent firms say they have entered at least one competition.

The average is 4 competitions per company.

Design and architecture competitions

Considered a major challenge by only 12% of all professionals, and more specifically by:

20% of architects
14% of interior designers
11% of landscape architects

Main difficulties or reluctance:

1. Effort and investment (time, money, resources) required to enter competitions
2. Eligibility
3. Jury (judgment, impartiality)
4. Project specifications
5. Project budget

Awards, prizes and other distinctions

Design and architecture firms and professionals seek to be **recognized** and **valued** by peers and clients.

Lack of time, staff and notable projects limit their participation in awards competitions.

69%

The vast majority of respondent firms (69%) have submitted applications for awards. That share decreases to 43% among individuals. The most popular award programs are: the Prix d'excellence of the Ordre des architectes du Québec, the Grands Prix du design, the Grafika competition (Créa), the RAIC International Prize, the Canadian Architect Awards of Excellence, the Canadian Interiors' Best of Canada Design, and the Red Dot Awards.

Issues of practice

The surveys and focus groups conducted as part of the study helped identify and better understand the key issues and challenges facing design and architecture practitioners in Montréal and more globally.

The significance attributed to these issues varies by discipline.

Primary issues facing the profession, professionals and firms

Issue	Percentage
Sustainable development	33%
Recognition for my/our work	32%
Growth and business development	29%
Availability and quality of labour	27%
Employee/talent retention	25%
Local and international competition	20%
Skills	20%
Access to public contracts	17%
Human capital	17%
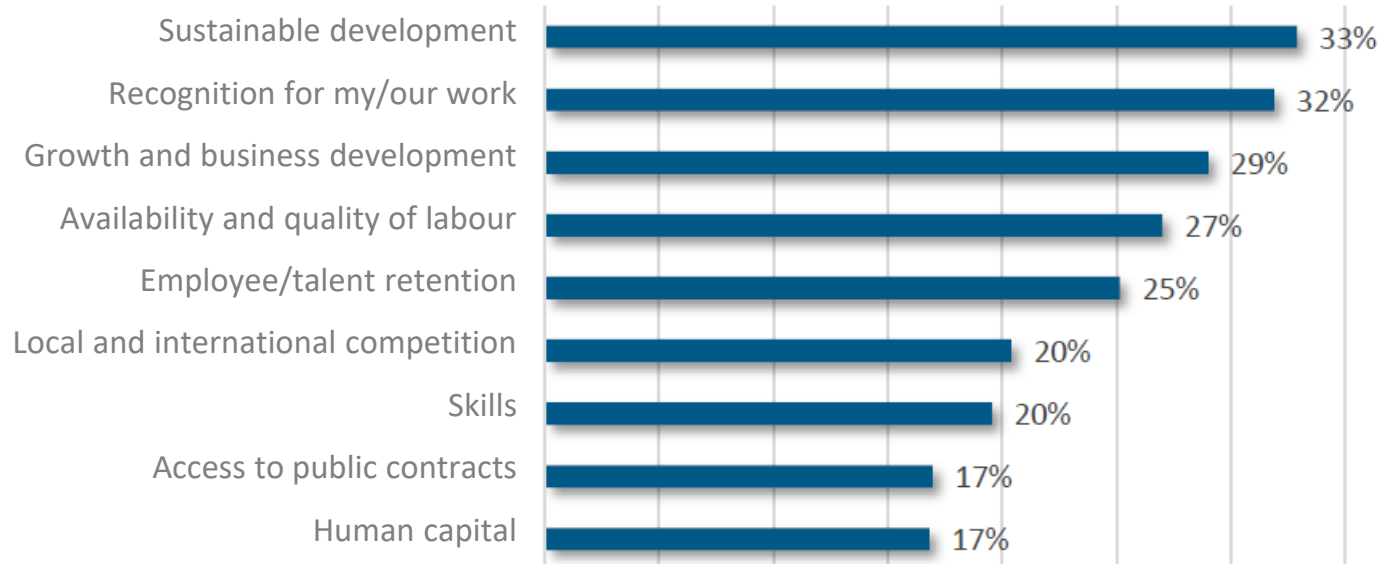
Local vs. international competition

Among the issues related strictly to **business environment**, local competition heads the list; conversely, international competition is deemed the least important.

	1	2	3	4	5
Local competition	6%	5%	15%	37%	33%
International competition	23%	11%	19%	16%	12%

■ 1 ■ 2 ■ 3 ■ 4 ■ 5   (1 = Not important; 5 = Very important)
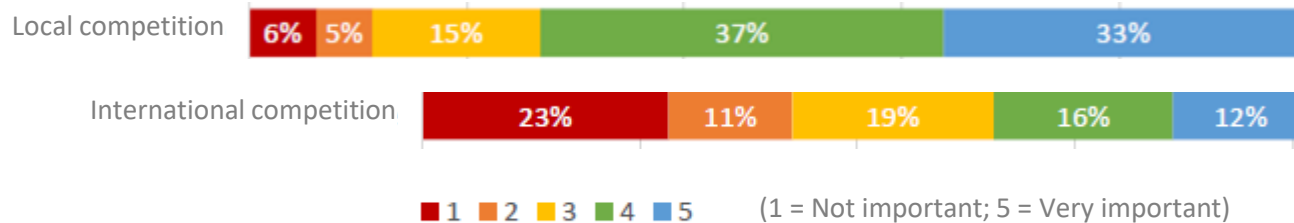
Issues of practice according to professional associations in design and architecture

1. The job market and human resources
2. The professional services market
3. Recognition for the work of designers and architects
4. Professional accreditation
5. Networking and engagement

Spokespersons for these groups (professional orders and associations) also mentioned:

- Access to public contracts, notably those of the Ville de Montréal
- The conceptualization phase of projects being too often neglected (time, money)
- Designers without certifications acting as professionals

Source: 2019–20 Design Montréal Census, consultation of heads of design, architecture and landscape architecture professional associations, compilation by MCE Conseils.

No. 1 issue: Sustainable development

Viewed as a major challenge by:

52% of industrial designers
42% of fashion designers
40% of landscape architects
37% of interior designers
35% of architects
22% of graphic designers

Obstacles, irritants, nuisances:

- Incoherences between sustainability objectives and budget
- Non-green or polluting manufacturing processes
- Lack of consideration for built heritage and water management
- Delayed involvement of designers and architects in projects
- Procurement policies that emphasize the lowest bidder
- Lack of financial incentives
- Lack of clear regulatations/instructions
- Low degree of innovation, experimentation
- Abundance of natural resources
- Individual and collective behaviours

No. 2 issue: Recognition

Viewed as a major challenge by:

36% of architects
33% of graphic designers
34% of industrial designers
30% of landscape architects
30% of interior designers
21% of fashion designers

Obstacles, irritants, nuisances:

- Perceived as a luxury service
- Limited role in projects or perceived as accessory (decorative)
- Professionals excluded at decisive stages ahead of projects
- Underestimation of work required
- Lack of an integrated approach, of interdisciplinarity
- Fragmentation of mandates
- Fees not in proportion to the work performed
- Lack of a promotional apparatus (lobby) for design

No. 3 issue: Growth and development

Viewed as a major challenge by:

43% of industrial designers
37% of fashion designers
34% of interior designers
32% of graphic designers
23% of architects
12% of landscape architects

Obstacles, irritants, nuisances:

- Limited access to public commissions for self-employed workers
- Lowest bidder preference
- Abusive clauses regarding responsibility
- Availability of image banks means clients prefer doing things themselves
- Shortage of skilled labour
- Shortcomings in CAD training
- No funding for research and development in design
- Competitors charging lower prices
- Fees not compensated for when decision-making delays or extensions occur

Roles that the Ville de Montréal could play when it comes to challenges facing design and architecture professionals and firms

- Recognize, highlight and promote the **work of Montréal designers and architects**.
- Enhance the **Ville de Montréal suppliers' file**: ensure that all design disciplines and specializations are represented, and use it.
- Facilitate **access to contracts**, in particular for self-employed workers.
- Simplify and clarify **call-for-tenders documents**.

Roles that the Ville de Montréal could play when it comes to challenges facing design and architecture professionals and firms (cont'd)

- Improve project **specifications** and **programs** (better define the contract, with a budget in keeping with the expectations).
- Support the **development and growth** of Montréal firms.
- Do more to promote **integration of design and designers** within companies.
- Create **employment opportunities** for designers with the city administration.
- Involve designers and architects **early in projects**.
- Allow designers and architects to contribute to **Montréal's green and social transition**: remove obstacles to quality and sustainability by ensuring clear regulations and instructions for all.

Development of Montréal firms specialized in design and architecture

Short-term investment priorities

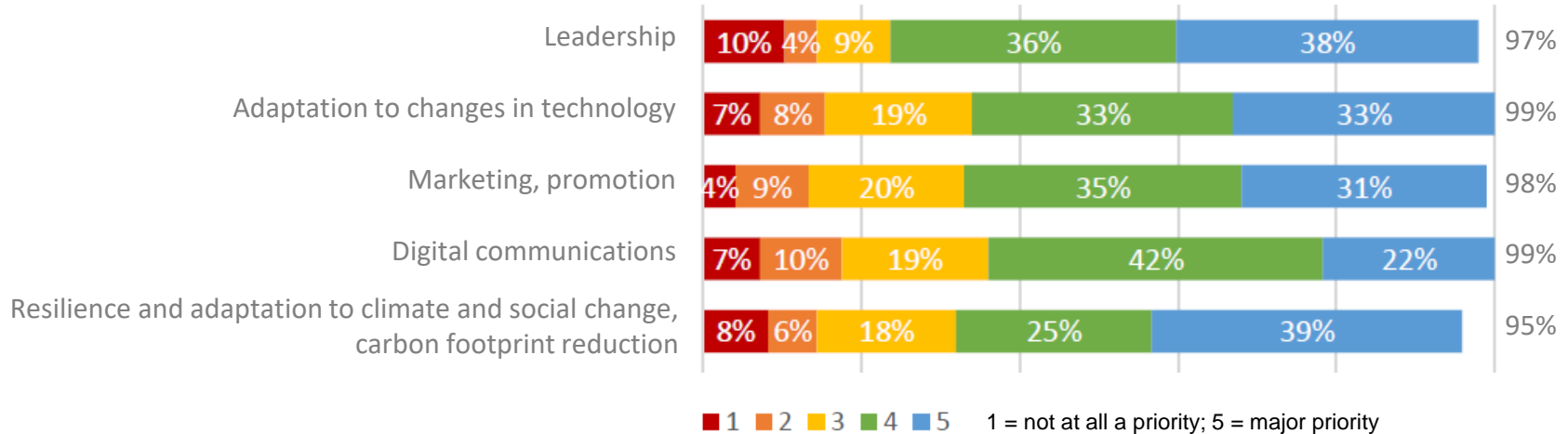# Priorities for 2025: lead the way and adapt to changes in technology

Montréal firms offering design and architecture services intend to develop by emphasizing **leadership** and investing in **technology**, **marketing**, **promotion** and **digital communications**.

Their strategies will also emphasize development of greater **resilience** to climate change and **carbon footprint reduction**.

Specialized firms' investment and development priorities

	1	2	3	4	5	
Leadership	10%	4%	9%	36%	38%	97%
Adaptation to changes in technology	7%	8%	19%	33%	33%	99%
Marketing, promotion	4%	9%	20%	35%	31%	98%
Digital communications	7%	10%	19%	42%	22%	99%
Resilience and adaptation to climate and social change, carbon footprint reduction	8%	6%	18%	25%	39%	95%

■ 1 ■ 2 ■ 3 ■ 4 ■ 5   1 = not at all a priority; 5 = major priority

Source: 2019–20 Design Montréal Census (N=97), compilation by MCE Conseils.

Challenges related to changes in technology

60%

of respondents consider that technologies aimed at **reduced energy consumption** are an important issue

58%

emphasize the importance of **online tools for collaboration**

Source: 2019–20 Design Montréal Census (N=97), compilation by MCE Conseils.

Highlights of the survey of Montréal firms and organizations not specialized in design or architecture

Firms whose primary concern is not the provision of design or architecture services but employing at least one professional trained in and working in design and/or architecture.

Unlike firms whose primary concern is the provision of design and architecture services, the legal statuses of these other entities are more disparate

Legal status of employers not specialized in design and architecture but that do employ professionals in these disciplines

Joint-stock company	40%
Non-profit organization	24%
Federal government	8%
Provincial government	8%
Municipal government	8%
Co-operative	4%
Other	8%

In this case also, most employers (except for governments) are small organizations with fewer than 35 employees.
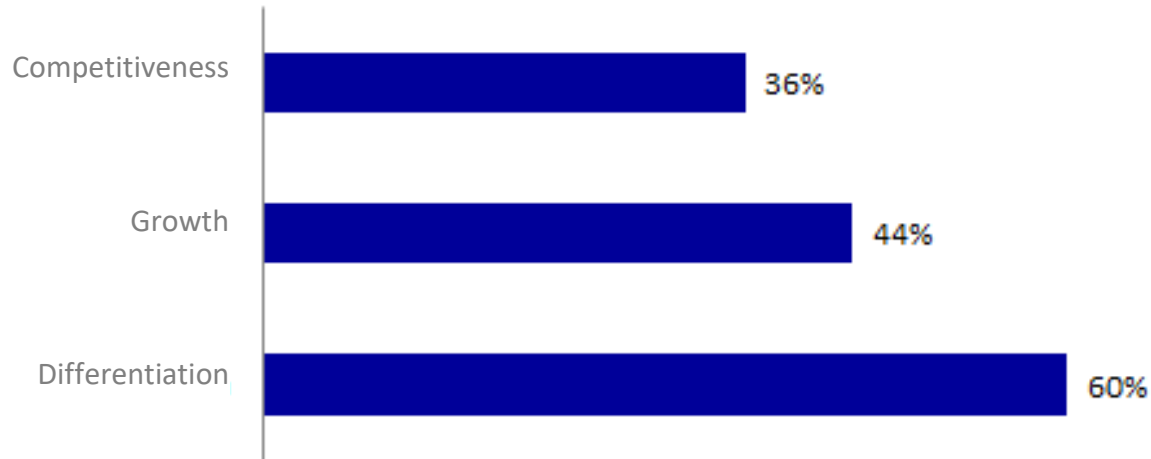
Source: 2019–20 Design Montréal Census (N=25), compilation by MCE Conseils.

In non-specialized companies, responsibility for the decision to engage design or architecture professionals is shared

- Leaders
- Clients, users, citizens
- Advisory committees

10%
37%
53%

The decision to engage design or architecture professionals is greatly motivated by the need for differentiation

Source: 2019–20 Design Montréal Census (N=25), compilation by MCE Conseils.

Companies that employ design and architecture professionals leverage design. . .

as a means to develop the **form and function** of a product or service

68%

as a **process or methodology**
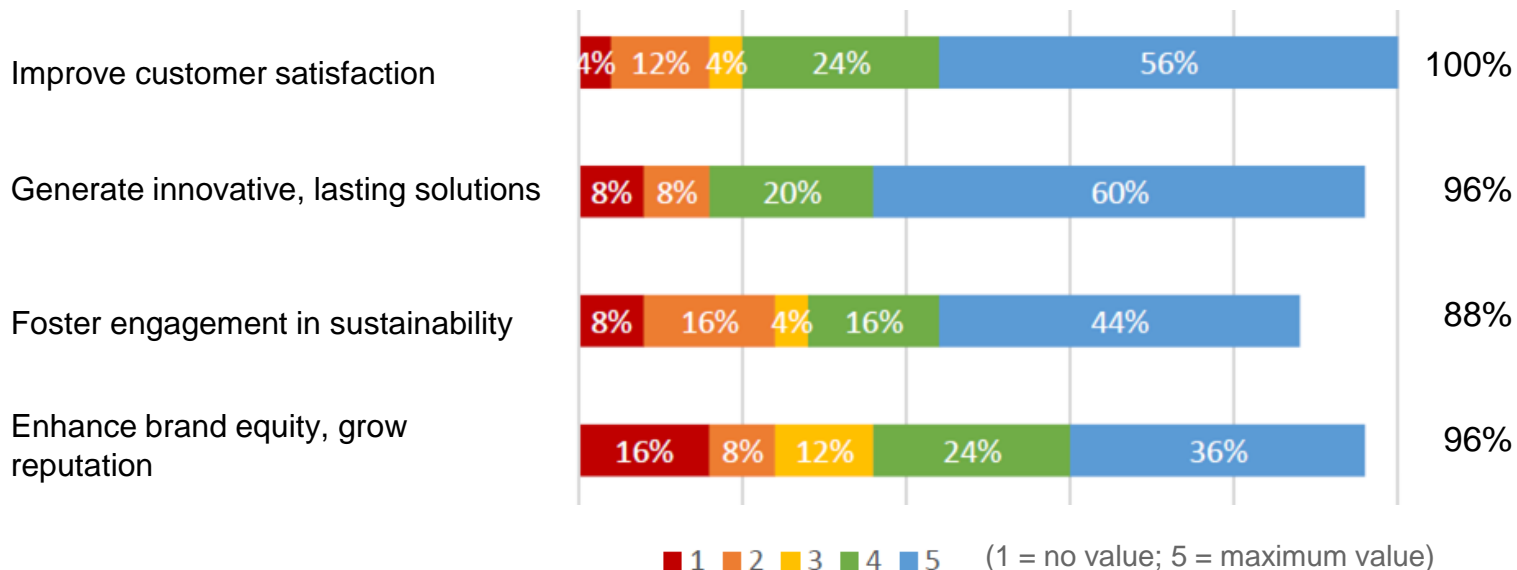that is part of their project development/execution process

60%

as a **strategy and way of thinking**
that is a strategic element of their business model

36%

Source: 2019–20 Design Montréal Census (N=25), compilation by MCE Conseils.

Design and architecture create value, say 80% of companies that employ professionals in these disciplines

	1	2	3	4	5	
Improve customer satisfaction	4%	12%	4%	24%	56%	100%
Generate innovative, lasting solutions	8%	8%		20%	60%	96%
Foster engagement in sustainability	8%	16%	4%	16%	44%	88%
Enhance brand equity, grow reputation	16%	8%	12%	24%	36%	96%

■ 1 ■ 2 ■ 3 ■ 4 ■ 5   (1 = no value; 5 = maximum value)

Design and architecture have a positive impact on the financial results of non-specialized companies that employ professionals in these disciplines
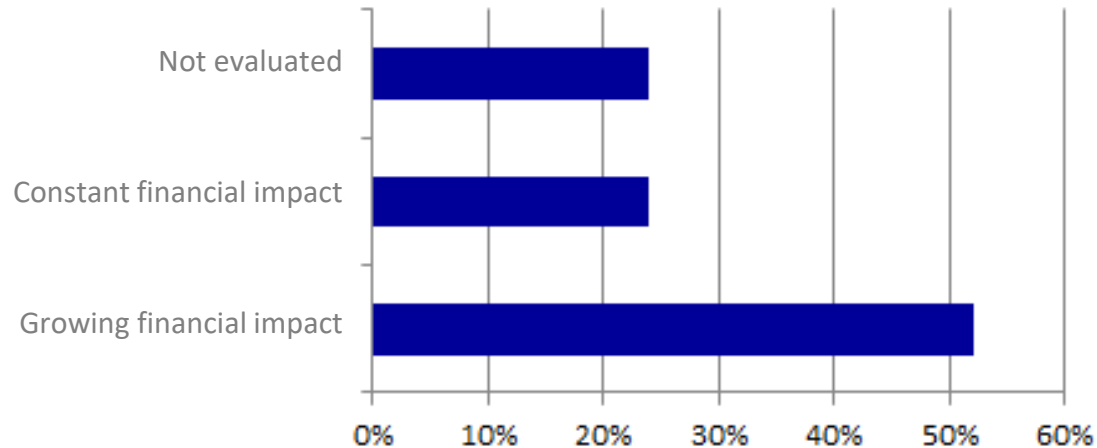
Conclusion
Design is an economic driver

Design and architecture appear to be growth industries. Higher operating revenues are recorded in Montréal, and profit margins for firms specializing in design are higher than elsewhere in Canada. The design ecosystem, consisting primarily of very small firms and with a pool of 19,255 professionals and technicians, is an economic driver for the city.

Respondents identified many issues and challenges. Many of them believe that designers and architects working for the city as well as in the private sector should act as agents of change (i.e., show structure-enhancing leadership), as project catalysts, and as informed, expert managers.

The Ville de Montréal, for its part, has a role to play in maintaining the wealth that these talents represent and in fostering the growth of the professionals and firms that have chosen to settle in Montréal.

Recommendations
For better metrics in the design industry

Identification and metrics in the design industry, especially for disciplines that are not represented by a professional order, represent a major challenge. To improve monitoring of changes in the industry and to be able to extend the study to include economic impacts for every one of these disciplines, a set of recommendations has been developed:

- Montréal should produce open-source data on the number and value of contracts awarded ot designers and architects;
- The Québec Treasury Board should refine the coding of contracts in the Système électronique d'appel d'offres public (SEAO, the online public tendering system) to better represent all design disciplines;
- The National Occupational Classification system (NOC) should be more specific with respect to certain design practices, which currently are grouped into broad categories: fashion design, urban design, environmental design, service design, product design, etc.
- The Canadian Census should provide statistics on the design professions at the level of the Montréal agglomeration;
- The Government of Québec should create a provincial registry of design professionals that provides various information, including which companies employ them.

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Note to readers:
This presentation does not reflect the entire survey conducted, but merely selected highlights.
For more information, readers may wish to consult the full study and its references (in French) on the website of the Bureau du design at www.designmontreal.com.

For further questions or to request a specific analysis, please write to: designmontreal@montreal.ca.

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