

HOSPITALITY GIANTS 2015 RESEARCH

October 29, 2015

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They say the one constant is change, and that's a valuable lesson we've learned since 1985. Yes, the *Interior Design* list of 75 Giants firms in the hospitality sector hits the big 3-0 this year. Does this coming of age imply a change in overall trends for the group? Let's go to the numbers. As a group, 41 percent of overall fees come from hospitality work, and that number has seen little recent fluctuation. For some perspective, the next-in-line category is corporate office at 26 percent. After that, categories such as government drop off into the single digits.

As for the last 30 years—and the next 30—here's a tidbit. We asked the hospitality Giants to tell us about the biggest changes both over that period and going forward. The answer wasn't unanimous, but it was close. Technology. It influences virtually every choice a hospitality designer makes today. As the Gettys Group puts it, "Technology has transformed the guest experience. We have to think now, more than ever, about each moment in the space. How can we help guests stay connected? Share their experience? Engage them through social media and technology platforms while there? We are constantly asking ourselves these questions to enhance our design." The future is now.

Swipe right on the charts to see more research!

Ran k 201 5	Firm	Headquar ters	Hospitality Fees(in millio ns)	Value(in millio ns)	Sq. Ft.(in millio ns)	Desig n Staff	Ran k 201 4
1	HBA/Hirsch Bedner Associates	Los Angeles, CA	\$126.800	\$7,608.00	72.46	1,507	1
2	Gensler	San Francisco, CA	\$73.914	NR	NR	1,997	2
3	Wilson Associates	Dallas, TX	\$39.060	\$3,000.00	NR	360	3
4	Rockwell Group	New York, NY	\$24.087	NR	NR	162	8
5	Bilkey Llinas Design	Palm Beach Gardens, FL	\$23.950	NR	NR	109	5
6	HOK	St. Louis, MO	\$21.000	\$637.00	NR	295	7
7	Leo A Daly	Omaha, NE	\$18.196	NR	NR	125	6
8	Steelman Partners	Las Vegas, NV	\$18.050	\$23.00	NR	88	12
9	VOA Associates	Chicago, IL	\$14.523	\$90.00	12.00	102	9
10	Pierre-Yves Rochon	Chicago, IL	\$14.108	\$250.00	NR	59	11
11	Wimberly Interiors	New York, NY	\$14.000	\$1,200.00	5.50	81	13
12	Gettys Group	Chicago, IL	\$12.848	NR	NR	79	17
13	Yabu Pushelberg	Toronto, Canada	\$11.730	NR	NR	102	--
14	HKS	Dallas, TX	\$11.666	NR	6.00	367	41
15	Daroff Design + DDI Architects	Philadelphia , PA	\$11.330	\$400.00	3.00	45	18
16	AvroKO	New York, NY	\$11.030	NR	NR	79	16
17	Stonehill & Taylor Architects	New York, NY	\$10.967	\$250.00	2.75	79	20
18	DiLeonardo	Warwick, RI	\$10.260	NR	NR	75	15

19	Rebel Design + Group	Marina Del Rey, CA	\$10.244	\$423.86	1.24	64	22
20	Baskervill	Richmond, VA	\$9.949	\$264.85	6.42	21	19
21	Jeffrey Beers International	New York, NY	\$8.400	NR	NR	29	30
22	HFS Concepts 4	Long Beach, CA	\$8.100	\$100.00	NR	50	--
23	Simeone Deary Design Group	Chicago, IL	\$8.075	NR	NR	50	34
24	KNA Design	Los Angeles, CA	\$7.700	NR	NR	42	21
25	AB Concept	Hong Kong	\$7.442	\$260.08	1.51	90	26
26	Design Duncan Miller Ullmann	Dallas, TX	\$6.926	\$68.00	65.00	63	31
27	Aria Group Architects	Oak Park, IL	\$6.882	\$95.00	0.80	93	25
28	Chambers	Baltimore, MD	\$6.408	\$70.00	0.65	23	32
29	FRCH Design Worldwide	Cincinnati, OH	\$6.353	\$3.00	2.00	167	14
30	Looney & Associates	Dallas, TX	\$6.305	\$750.00	2.10	44	29
31	ForrestPerkins	Dallas, TX	\$6.197	NR	NR	38	39
32	Rottet Studio	Houston, TX	\$6.160	NR	NR	44	24
33	EDG Interior Architecture + Design	Novato, CA	\$5.997	\$166.00	0.60	60	28
34	CBT Architects	Boston, MA	\$5.760	NR	NR	55	27
35	ICRAVE	New York, NY	\$5.029	\$48.48	0.60	38	38
36	Perkins Eastman	New York, NY	\$4.900	\$24.38	0.90	217	43
37	RTKL	Baltimore, MD	\$4.887	\$9.00	NR	94	40
38	TAL Studio	Las Vegas,	\$4.695	\$60.00	NR	22	36

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39	Dawson Design Associates	Seattle, WA	\$4.100	\$185.00	NR	29	47
40	Design Development Company	Agoura Hills, CA	\$4.000	\$10.00	0.25	12	46
41	JOI-Design	Hamburg, Germany	\$3.800	\$50.00	NR	32	37
42	Smith-Firestone Associates	Santa Barbara, CA	\$3.520	\$1.43	NR	22	62
43	Parker-Torres Design	Sudbury, MA	\$3.100	NR	NR	25	45
44	Shea Design	Minneapolis, MN	\$3.080	\$45.50	0.15	24	51
45	Areen	London, UK	\$3.010	\$85.00	2.20	23	56
46	C2 Limited Design Associates	Fairfield, CT	\$2.975	\$5.95	NR	11	49
47	Puccini Group	San Francisco, CA	\$2.900	\$4.50	0.21	26	69
48	Hatch Design Group	Costa Mesa, CA	\$2.894	\$107.20	0.31	25	50
49	BraytonHughes Design Studios	San Francisco, CA	\$2.758	NR	NR	24	35
50	Kay Lang + Associates	Los Angeles, CA	\$2.720	NR	NR	19	59
51	Bar Napkin Productions	Phoenix, AZ	\$2.660	\$70.00	0.08	19	65
52	CHIL Interior Design	Vancouver, BC	\$2.653	NR	NR	81	--
53	Design Directions International	Marietta, GA	\$2.653	\$18.78	1.68	7	53
54	Indidesign	Los Angeles, CA	\$2.500	\$40.00	0.80	15	52
55	DAS Architects	Philadelphia	\$2.468	\$3.29	0.31	17	57

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56	SKIN Design Studio	San Francisco, CA	\$2.398	NR	NR	11	55
57	SOSH Architects	Atlantic City, NJ	\$2.240	\$58.35	0.60	14	--
58	R. D. Jones & Associates	Baltimore, MD	\$2.219	NR	NR	29	48
59	DLR Group	Overland Park, KS	\$2.198	NR	NR	131	42
60	Elkus Manfredi Architects	Boston, MA	\$2.140	NR	NR	62	44
61	RPW Design	London, UK	\$2.130	\$94.00	1.23	26	58
62	Cole Martinez Curtis & Associates	Marina Del Rey, CA	\$2.125	\$150.00	1.50	8	--
63	Krause+Sawyer	New York, NY	\$2.080	\$30.04	0.32	12	--
64	Heitz Parsons Sadek	West Palm Beach, FL	\$1.887	\$18.00	NR	13	61
65	Woods Bagot	Adelaide, Australia	\$1.884	NR	NR	181	--
66	Thomas Hamilton & Associates	Richmond, VA	\$1.832	\$40.31	NR	10	64
67	Smallwood, Reynolds, Stewart, Stewart & Associates	Atlanta, GA	\$1.823	NR	NR	38	63
68	Greymatters	Singapore	\$1.800	\$150.00	1.00	28	54
69	Cleo Design	Las Vegas, NV	\$1.697	NR	NR	15	71
70	HapstakDemetrio u+	Washington, DC	\$1.650	\$8.00	0.15	21	--
71	Rowland+Broughton	Aspen, CO	\$1.644	\$29.91	0.22	15	68
72	K2M Design	Cleveland, OH	\$1.634	\$50.00	0.50	13	67
73	Lawrence Group	St. Louis,	\$1.629	\$50.00	0.36	58	66

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74	designONE Studio	Atlanta, GA	\$1.583	\$45.00	4.10	14	--
75	J Banks Design Group	Hilton Head Island, SC	\$1,580	\$10.00	1.20	19	--

Methodology

The annual business survey of Interior Design hospitality Giants ranks the largest design firms by hospitality design fees for the 12-month period from July 2014 through June 2015. Hospitality design fees include those attributed to:

1. All hospitality interiors work.
2. All aspects of a firm's hospitality design practice, from strategic planning and programming to design and project management.
3. Fees paid to a firm for work performed by employees and independent contractors who are full-time staff equivalent.

Hospitality design fees do not include revenues paid to a firm and remitted to subcontractors that are not considered full-time staff equivalent. For example, certain firms attract work that is subcontracted to a local firm. The originating firm may collect all the fees and retain a management or generation fee, paying the remainder to the performing firm. The amounts paid to the latter are not included in fees of the collecting firm when determining its ranking. Additionally, where applicable, all percentages are based on responding hospitality Giants, not their total number. The data was compiled and analyzed by the Interior Design market research staff, led by Wing Leung, research director.