Think Design:

Toronto's Design Sector

Kevin Stolarick, PhD

2022

TWIG TORONTO WORKFORCE INNOVATION GROUP

Thirty years of building Toronto's workforce development system by tackling the tough questions, providing timely labour market data, and mobilizing communities.

We know that a high functioning employment and training system gives people access to a better life and ensures more of Toronto's businesses see sustained growth. In order to achieve this, we are committed to:

- **Convening** stakeholders and talking about the employment and skills development issues that matter.
- **Ensuring** that all Torontonians have access to the right labour market information at the right time.
- **Fighting** for inclusive skill development approaches that can contribute to addressing the needs of some of Toronto's most important communities who have long suffered inequities.
- **Prioritizing the needs of the** small business community. They are the backbone of Toronto's economy and will drive future growth.
- **Rejecting** policy approaches that occur in silos or do not understand the lived experience of Toronto's people and businesses.

Our board is comprised of passionate leaders from Toronto's business, industry, and non-profit communities. Our staff is committed to action-based research and data analysis that can be used by the workforce development system to support Toronto's vibrant and diverse economy.

Services we Provide

At its core — TWIG is a non-profit and independent research organization devoted to finding and promoting solutions to employment-related problems in the Toronto Region. To that end we:

- Produce timely, usable, accurate, and accessible labour market information (LMI).
- Design tools and approaches towards facilitating career, education and workplace decision-making for Toronto industry, workers, and job-seekers.
- Support programs and policy makers to determine what works for whom in workforce development — whether it is youth struggling to enter the workforce, midcareer workers who have lost their jobs because of closings or layoffs, and older workers who must adapt to changing employment circumstances.
- Conduct rigorous but inexpensive evaluations of workforce development initiatives. Our evaluations are collaborative and understand that the best evaluation approaches do not make judgements, but are instead geared toward program improvement.

To inquire about how TWIG could provide any of these services to your organization, email john@workforceinnovation.ca.

We are also available make LMI presentations to industry groups, students, and employment and career counsellors. To book a presentation, email john@workforceinnovation.ca.

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Acknowledgements

A big “thank you” to everyone who participated in this study by giving up time for an interview (listed in the appendix), reviewing information and findings, or taking part in any of the numerous virtual, in person or via email informal conversations. Every effort has been made to reflect your shared wisdom and knowledge. Any mistakes or inconsistencies are solely the fault of the author and are not a reflection of your excellent insights. Also, a special “thank you” to Arlene Gould of DIAC, Laurie Belzak of Economic Development and Culture at the City of Toronto, and John MacLaughlin of TWIG who all helped with herding the cats and making sure I was making sense and not just presenting data. Design of this report, its information graphics, and accompanying website by Michelle Hopgood.

— KMS

A Message from DIAC

The Design Industry Advisory Committee (DIAC), was pleased to act as Subject Matter Experts for this significant study by Kevin Stolarick for the Toronto Workforce Innovation Group. We are excited to see that this research demonstrates the importance of the Toronto design sector workforce as a critical resource for economic and social advantage in Toronto and in our region. The statistical data reveals the size and growth of Toronto's Design Sector, and the significant number of Designers working across other sectors to enable innovation and prosperity. These findings build on the results of research commissioned and published by DIAC in 2004, "Designing the Economy: A Profile of Ontario's Design Workforce", by Meric S. Gertler and Tara Vinodrai. The release of *Think Design: Toronto's Design Sector* is timely, as we rethink how we live and work in the post-peak pandemic period. We expect this report will be of great interest to the Design Sector's many stakeholders, in particular industry and policymakers.

Arlene Gould
Strategic Director
Design Industry Advisory Committee
www.diac.on.ca

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A Message from TWIG

The Toronto Workforce Innovation Group is pleased to release the report Think Design: Toronto's Design Sector researched and written by Kevin Stolarick. Over the last several years, I've had the fortune to work with Kevin on several labour market initiatives. I was not only impressed with his ability to work with our data sets but more importantly, his ability to ask the right questions of the data and understand the data's answers.

However, when Kevin first approached me about writing a report on the *"design sector"*—I must admit I was initially befuddled. Was *design* an industry, an occupation or a skill? The more time I spent reading and discussing the project, the more I understood. Design is a critical element of healthy economies, it spurs innovation, and is also a distinguishing feature of occupations that require critical faculty, higher order technical skills and creativity. Or, as noted by Ralph Caplan, author of *By Design*; "Thinking about design is hard, but not thinking about it can be disastrous." The concept of design is now seen as so important, that advanced economies such as Singapore have identified the design sector as a key driver of innovation and value creation for businesses and the economy, while also being an effective approach for solving societal problems.

This report indicates that over 51,000 Torontonians are working in a design occupation with an additional 12,000 people working in a design firm. These employees and firms are playing important roles whether it is in computing, financial services, manufacturing, the arts or construction. The more we think about design, the more we realize that it is always around us—from housing to the transportation we rely on and to the digital devices we use. Indeed, the phrase "this was well designed" is a term that is often used to describe a product or service we value. Because of this report, I now better understand why *design* is so important, irrespective of its definition.

Whether it is in our education system or in our business community, if we can emphasize and nurture design, then Toronto will continue to thrive and be at the forefront of innovation and maintain our international reputation of being a livable city.

Finally, on behalf of TWIG, I would like to thank the Ministry of Labour, Training and Skills Development for their ongoing support of Local Training Boards so we can publish critically important reports such as this.

John MacLaughlin
Interim Executive Director
Toronto Workforce Innovation Group
www.workforceinnovation.ca

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Executive Summary

Key Takeaways

01. **The Design Sector is a critical component of Toronto's economy,** both in its own right and in the synergistic way that Design enables, promotes and supports other sectors across the City including Finance, Tech/Information, Construction and Manufacturing.

02. **Over 61,000 people in the Toronto metro area work in either a Design Occupation or at a Design Firm or both.** Five in six Designers work in other industries. Total employment in the Design Sector is roughly the same as total employment in the Real Estate or Information and Cultural Industries and larger than Public Administration, Education, and Arts & Entertainment.

03. **Toronto's Design Sector is a major portion of Design across Canada with roughly 30% of the country's Design firms/employees and over 20% of Canadians employed in a Design job.** Between 2016 and 2020, Toronto accounted for 56% of all Canada-wide employment growth in the Design Industry.

04. **Toronto is home to several large Design firms that are part of multi-national organizations but serve as Canadian and even global hubs and aren't just branch offices of US firms.** These larger firms provide a multidisciplinary range of Design services and create opportunities for the numerous, smaller Design Consultancy firms in the city.

05. **Working in the Design Sector in Toronto presents many career opportunities and pathways.** The region's thick labour market across diverse industries and the large number of firms that employ Designers generates numerous and varied opportunities that can be pursued within the region.

Report Highlights

Design is recognized around the world as a key to economic and social prosperity[1]. Toronto is well positioned to take advantage of the economic opportunity inherent in this current Design focus with a critical mass of designers working in the Design disciplines of architecture, landscape architecture, industrial, interior, graphic, fashion, planning and urban design. This cluster includes both firms specific to these disciplines and the trained and skilled individuals working in various capacities and levels of formal education across a variety of related occupations and across numerous industries. Design has an enabling synergistic impact on industries across the Toronto economy from Financial Services to Construction and Infrastructure from Entertainment to Manufacturing. The positive impact of Design is not restricted to a few firms in a small industry but is widespread.

In 2016, 51,065 people were working in a Design occupation, and 12,257 people were working (in 2020) in a Design firm[2]. While many people working in a Design occupation work in a different industry[3] and not everyone working at a Design firm is doing Design work, some overlap exists. The 2016 Census provides the ability to estimate this overlap. 5.4% of 27,610 individuals in Professional Services in Toronto work in **both** a Design Occupation and at a Design firm. The result is 1,491 workers. Given the above estimates for occupation and industry totals, the result is an estimate for the Toronto Design Sector of **61,831 people who either work in a Design occupation or at a Design firm or both**.

1 See for example, The Design Council's "The Design Economy: The value of design to the UK" at https://www.designcouncil.org.uk/our-work/championing-the-value-of-design/design-economy/

2 As of production of this report, the 2021 Census data with updated details on occupation and industry for Toronto's workers has not been released. An update to this report with those numbers and updated job posting numbers will be released at the end of 2022.

3 "Occupation" and "Industry" are defined here according to Statistics Canada and the data made available. An occupation is based on the job that someone is doing while industry is determined by the firm in which they are working. "Design Sector" is used to identify those in a Design occupation or working at a firm in the Design industry.

Figure 1. Toronto's Design Sector

61,831 people work in Toronto's Design Sector in a Design occupation, at a Design firm, or both.

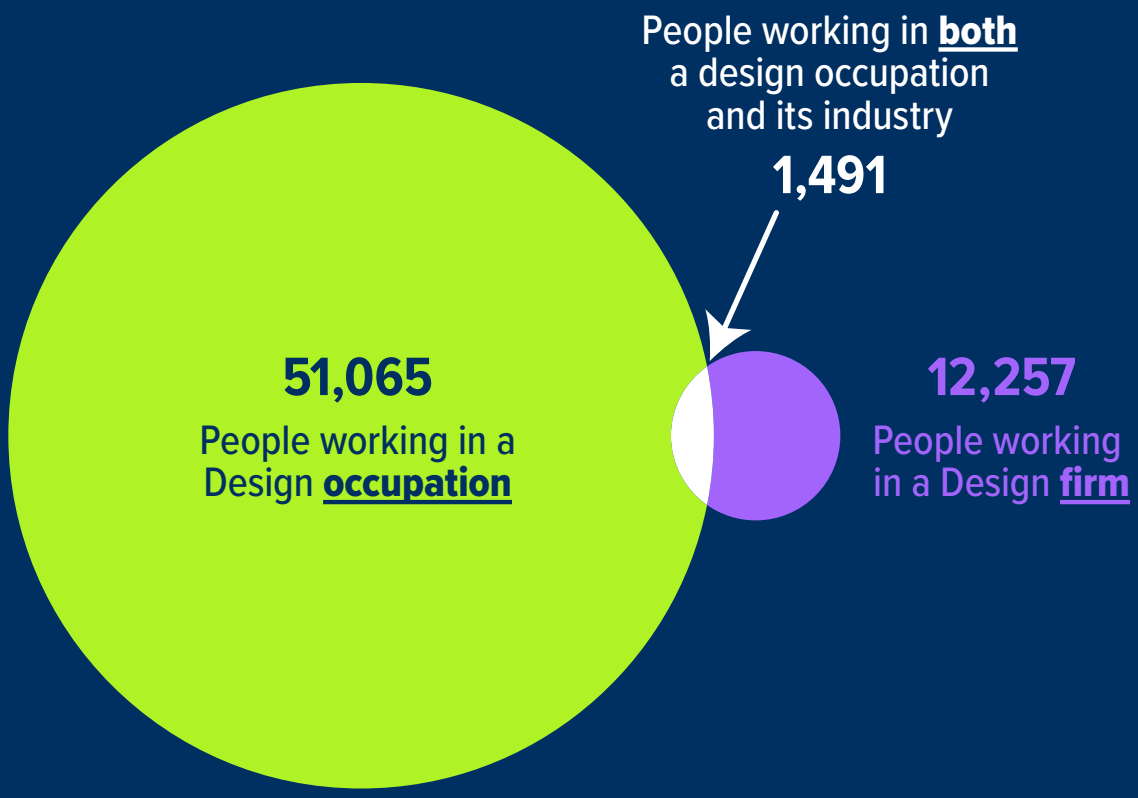


Table 1 shows where the Design Sector would rank among Toronto's industries by total employment size. (All numbers are from 2016 for comparability.) The Design Sector is roughly one-quarter the size of the region's largest industries (Retail and Manufacturing). It is roughly the same size as the Real Estate, Information, and Public Administration industries. It is larger than Education and Arts/Entertainment. Because Design is cross-sectoral, some Designers work in all these industries. By understanding how the total Design Sector includes more than just a few companies in some specific industries, a more complete picture is revealed.

Table 1. Toronto's Industries by Total Employment Size

Industry Title	NAICS Code	Estimated Total Employment
Total		2,247,979
Retail trade	44–45	250,920
Manufacturing	31–33	227,928
Professional, scientific and technical services	54	189,682
Accommodation and food services	72	180,733
Health care and social assistance	62	177,366
Finance and insurance	52	176,554
Administrative and support, waste management and remediation services	56	171,387
Wholesale trade	41	171,221
Construction	23	139,611
Other services (except public administration)	81	95,590
Transportation and warehousing	48–49	88,032
Management of companies and enterprises	55	80,715
Real estate and rental and leasing	53	67,744
Design Sector		**61,831**
Information and cultural industries	51	61,358
Public administration	91	59,505
Educational services	61	46,526
Arts, entertainment and recreation	71	44,517
Utilities	22	6,387

(Canadian Business Counts, 2016)

Specific Takeaways

This report presents a complex quantitative and qualitative view of Toronto's Design Sector, its current state, trends, challenges and potential. Below are summarized some of the key takeaways from this report for specific audiences—the "so what does this have to tell *me*?"

Policymakers

- To leverage the appreciation and economic potential of the true business value of Design across all industries, Ontario should implement a tax credit for Design work similar to Quebec[4]. This has been considered in the past but the potential should be considered again.
- While the planned reduction of "Canadian experience" requirements includes Design professionals and should help reduce barriers to entry for those with international education, credentials and experience, it will not eliminate all barriers as things like membership fees and other financial requirements could be equally as challenging for new Canadians.

Design Professionals

- Employment prospects in fields related to construction, transportation and infrastructure are especially promising but also across all industries. Working in the Design Sector in Toronto presents many different opportunities to pursue your career. Those with at least some experience (5+ years) are especially in high demand.
- The mix of both small (more focused) and large (more international) firms and the wide variety of industries hiring Designers offers opportunities to expand flexibility and experience.
- Employment in Toronto offers a slight wage premium over the rest of Canada but not sufficient to offset the higher cost of living.

Independent Design Professionals (Freelancers)

- Design firms are very busy. Many are catching up on work that was delayed during the pandemic, but many companies are not making permanent employment commitments. As a result, demand for freelancers has increased.
- At the same time and after experiencing two years of almost completely remote work, companies are recognizing the challenge of fully incorporating freelancers and their contributions into their projects.
- In addition to demonstrating exceptional Design skills, freelance Designers should use their portfolio to demonstrate the "softer" relational/client skills, project management skills, and more complete understanding of the full product lifecycle and value chain—don't just be an outstanding Designer, be an outstanding Designer that demonstrably knows how to get things done.

4 https://www.revenuquebec.ca/en/online-services/forms-and-publications/current-details/co-1029-8-36-7-t/

New Canadian Design Professionals

- Ontario is looking to change the “Canadian experience” requirements[5]. Those changes will be helpful but are not yet implemented.
- Mentorship, internship and other work-related opportunities are helpful but can be difficult to find. Be persistent and keep looking and asking. More is being done “in principle” than actuality, so you will find many people talking about this and how important it is without creating new opportunities. However, some progress is being made.
- Language (English) both written and spoken was frequently identified as a challenge in hiring new Canadian Design professionals. Improving this can be especially difficult when working remotely and not in the same office as others. Look for opportunities to strengthen English skills and to demonstrate those skills to potential employers who can draw unfortunate conclusions after just a few spoken sentences.
- The local Colleges provide a variety of different credentials that can be obtained in a short period of time and for minimal cost that can facilitate Design employment opportunities. While a more technically focused certificate may not result in full employment in your trained profession, the skills are in high demand and can help to get your “foot in the door”.

Small Design Companies

- You know what you do. You do it well. You know what you can bring to clients and to larger firms in need of your specific expertise. Keep it up.
- Think about succession planning. What happens when all your principals retire? What about just one of them? Many small firms have been acquired by larger firms to “save” the failing smaller firm and gain access to the skilled employees. Is that what happens to your firm?
- Realize the opportunity inherent in the flexibility being a small firm offers as you struggle to attract employees, and partner with larger firms to gain international opportunities and traction.
- Leverage the diversity inherent in the Toronto region and your existing employees to strengthen inclusion within your firm and realize the benefits inclusion creates.
- Start “farming” instead of “head-hunting” to improve the skills, skill base and diversity of your team. Learn how to attract employees you can grow into the positions you will need them for in the next 3–5 years. There likely won’t be enough to steal them from other firms.

5 https://www.immigration.ca/ontario-ready-to-end-canadian-work-experience-requirement-for-several-regulated-professions

Large Design Companies

- Continue being the Canadian and international hub for your organization and not just an office in Toronto. Part of the attractiveness of Canadian firms that are acquired by US companies, is the “Canadian-ness” which creates diversity, inclusion and international opportunities. Recognize, maintain and leverage that.
- Believe in the growth of your business and opportunities being presented and hire more permanent staff.
- Hire more students. While you might be able to steal experienced employees from other firms, it’s a “zero sum” game that won’t create winners in the long run. Without providing greater opportunities for students and ways for them to gain experience and work-integrated-learning, interest in Design professions will wane in high school students as they hear current graduates talk about not being able to find employment. Large firms are much better positioned to hire, on-board and train recent graduates.
- Press Design educators and Design post-secondary programs to educate students with the mix of Design, technical and product skills that you are desperately looking for. Provide more internship opportunities so the students develop a greater appreciation for this mix of skills and take it back to their campus and classrooms.
- Hire more new Canadians. International companies care about international not Canadian experience. Capitalize on the opportunity of being located in the preferred landing city in one of the preferred countries in the world for international Design professionals. Some are also picking Canada as a stepping-stone to the US. Large international firms can use that to their advantage. Provide ways to lower barriers for professional registration and credentialing of international Design professionals.
- Start “farming” instead of “head-hunting” to improve the skills, skill base and diversity of your firm. Learn how to attract employees you can grow into the positions you will need them in in the next 3–5 years. There likely won’t be enough to steal them from other firms.

Design Educators

(This advice is based on what Design professionals reported as gaps in the interviews. Toronto’s colleges and universities offer a wide variety of different programs and approaches to Design education and may already be meeting some or all these recommendations.)

- Create a first year foundational Design curriculum that is required of students across all Design disciplines to create a solid, unified base knowledge of Design principles and thinking.
- Intensify training in product lifecycle, technical and production skills to better meet the requirements of employers.

- Find industry partners across all industries employing Designers in your disciplines to strengthen understanding of industry needs and hiring opportunities.
- Formally partner with large employers and find ways to informally connect with small employers and the Design professional organizations to increase internship and work-integrated-learning (WIL) opportunities for students.
- Continue emphasis on increasing Indigenous, gender, racial, origin, and sexual orientation diversity and intersectionality across students to facilitate that diversity across Design professions.
- Improve and increase inclusion of equity and diversity issues within the taught practice of the Design disciplines.

Design Students

- Take courses to improve your technical, product lifecycle and production skills no matter what your Design discipline.
- Find ways to improve your “soft skills” and client/team relationship skills.
- Build a portfolio that isn’t just beautiful but also demonstrates your ability to get things done.
- Build a portfolio that tells your story.
- Find internship and other work-integrated-learning (WIL) opportunities. Work hard at doing this. Don’t give up too quickly and keep looking and pushing.
- Research the job market and industries that are hiring for your Design profession. Not all jobs are described the same way in different industries. Jobs can be posted in different ways and in different places. The better you understand the nuance of your specific desires, skills and Design profession and the hiring industries, the more likely you will be to find the right job.

Students Interested in Design

- Learn about the Design professions and occupations.
- Learn about the Design Industry.
- Learn about the different industries that hire Design professionals.
- All Design professions include some post-secondary education, but it ranges from micro-credentials to certificates to degrees to diplomas (undergraduate and graduate). Consider the tradeoffs among desire, ability, time available, money (needed and to be made), and other factors important to you. Opportunities exist and are growing across the entire Design Sector.

Why the Design Sector?

Design is recognized around the world as a key to economic and social prosperity. Toronto is well positioned to take advantage of this current Design focus with a critical mass of designers working in the Design disciplines of architecture, landscape architecture, industrial, interior, graphic, fashion, planning and urban design (https://www.diac.on.ca/quick-facts). This cluster includes both firms specific to these disciplines and the trained and skilled individuals working in various capacities and levels of formal education across a variety of related occupations and across numerous industries. Research from over 15 years ago (https://www.diac.on.ca/design-matters-study) found over 25,000 individuals working in Design across the GTA.

Of the 500 occupations identified by Statistics Canada, 10 have either the word *architect* or *design* in their title, and 42 have either or both in their description. The 2016 Census shows that the Toronto Metro has over 62,700 people working in one of those ten occupations with almost 24% being self-employed. (The average for self-employment in Toronto is 12.7%.) Making up 1.9% of the workforce, designers earn 2.0% of regional income, ranging in average from $38,500 per year for Theatre, fashion, exhibit and other creative designers to $120,000 per year for Architecture and science managers. 62% of these individuals have a University degree (the average is 40%), and 90% have some post-secondary education (Toronto average 67.5%).

The Design Industry has eight specific industry codes with *design* or *architect* in their titles and 34 industries with them in their description. As of 2020, those eight industries employed 82,800 people across 17,200 firms in the Toronto Metro and comprise 3.5% of regional employment by industry and 7.6% of all firms. Most of these firms are in the SME (small and medium enterprise) category with an average firm size of 4.8 employees versus the regional average of 10.4. 85% of firms in the Design Industry have 1–4 employees (vs. 62% overall), and 99.0% have under 100 employees (vs. 97.7% overall).

Given the prevalence of self-employment and smaller firms, the Design Sector is of special interest. With limited labour market information on this sector, both skill and labour market gaps are poorly understood, and with many working as freelancers, traditional job posting data does not capture the nuance of the situation. The Toronto Design sector needs to be profiled to better realize its potential and the potential of its practitioners to address innovation and social needs emerging in today's complex economic and social environment.

What is the Design Sector?

Design Sector Definition — Industries

Table 2. Design Sector Definition: Industries

NAICS Code	Industry Title
541310	Architectural services
541320	Landscape architectural services
541410	Interior design services
541420	Industrial design services
541430	Graphic design services
541490	Other specialized design services

2020 Design Industry

Using firm data for these industries, the Design Industry has nearly 38,000 people employed across 8,600 firms across Canada and 12,250 people employed in about 2,400 firms in Toronto (metro area). Toronto accounts for 27.5% of firms in the Canadian Design Industry and 32.4% of total employment. The higher employment share results from a higher average firm size for Toronto Design firms (5.15 employees per firm in Toronto and 4.38 per firm across Canada).

Table 3. Canada's Design Industry

Location	Firm Count	Estimated Total Employment
Canada	8,642	37,874
Ontario	3,715	16,881
Toronto	2,379	12,257
Toronto % of Canada	27.5%	32.4%

"Design is a growing component of what is being done in Canada."

Design Sector Definition — Occupations

Table 4. Design Sector Definition: Occupations

NOCS Code	Occupation Title
0212	Architecture and science managers
2151	Architects
2152	Landscape architects
2153	Urban land use planners
2154	Land surveyors
2225	Landscape and horticulture technicians and specialists
2251	Architectural technologists and technicians
2252	Industrial designers
2253	Drafting technologists and technicians
2254	Land survey technologists and technicians
5223	Graphic arts technicians
5241	Graphic designers and illustrators
5242	Interior designers and interior decorators
5243	Theatre, fashion, exhibit and other creative designers
5245	Patternmakers — textile, leather and fur products
9217	Supervisors, textile, fabric, fur and leather products processing and manufacturing

"Everybody wears multiple hats in our firm and that's one of the things I love about it. We have this wonderful mix…wonderful sort of quilt of people and their experiences that we can pull from on projects very easily, move very fluidly."

2016 Design Occupations

Using the occupations listed as the means of identifying Design workers, the 2016 (most recent Census data available) numbers show over 236,000 people working in Design across Canada with just over 51,000 in Toronto (metro area). While Toronto accounted for nearly 30% of Canadian Design firms, 21.6% of Canadian Design workers call Toronto home. This is still over one-in-five of the country's Design workers. Design workers in Toronto earn a slight wage premium (6%) when compared to the country overall, but this is insufficient to offset the cost of living differential.

Table 5. Design Occupations (2016)

Location	Total Workers	Average Income
Canada	236,090	50,288
Ontario	89,285	51,113
Toronto	51,065	53,340
Toronto % of Canada	21.6%	106.1%

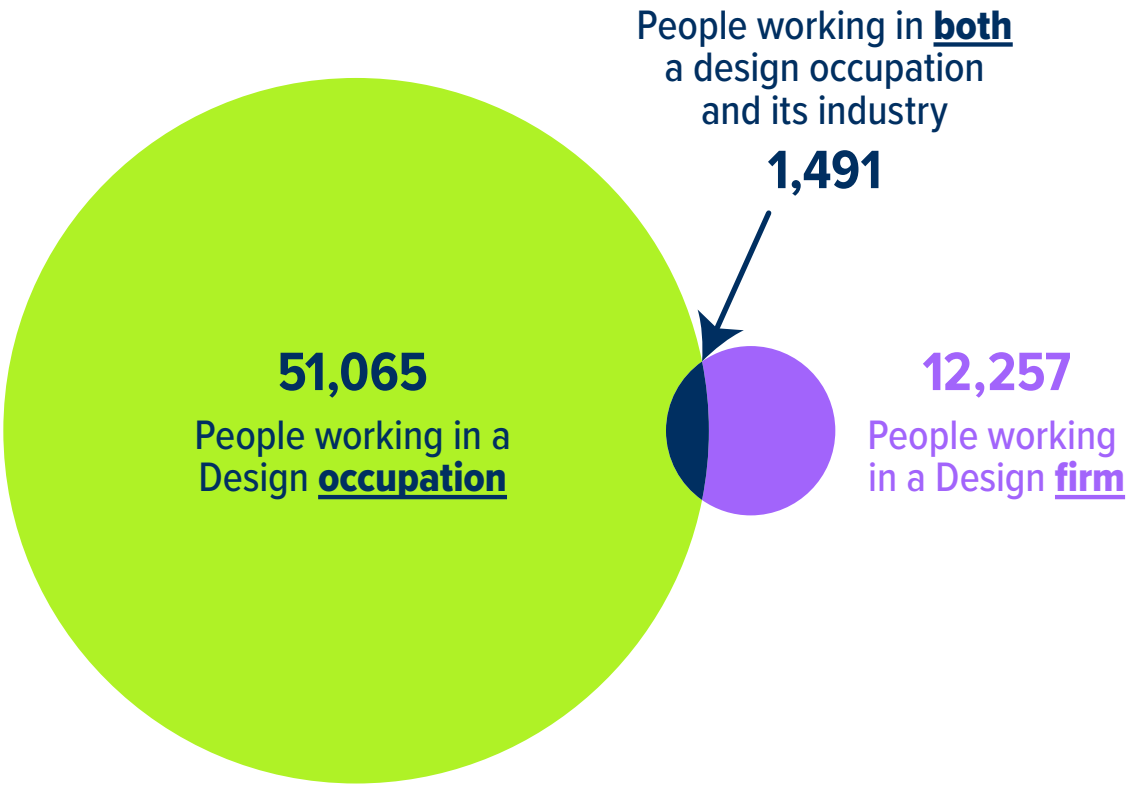
"It [Design in Canada] has changed dramatically from more sleepy 22 years ago when I started. Canada has become more mature with hubs like Vancouver, Montreal, Toronto."

The Complete Design Sector

In 2016, 51,065 people were working in a Design occupation, and 12,257 people were working (in 2020) in a Design firm. While many people working in a Design occupation work in a different industry and not everyone working at a Design firm is doing Design work, some overlap exists. The 2016 Census provides the ability to estimate this overlap. 5.4% of 27,610 individuals in Professional Services in Toronto work in **both** a Design Occupation and at a Design firm. The result is 1,491 workers. Given the above estimates for occupation and industry totals, the result is an estimate for the Toronto Design Sector of **61,831 people who either work in a Design occupation or at a Design firm or both**.

Figure 2. Toronto's Design Sector

61,831 people work in Toronto's Design Sector in a Design occupation, at a Design firm, or both.



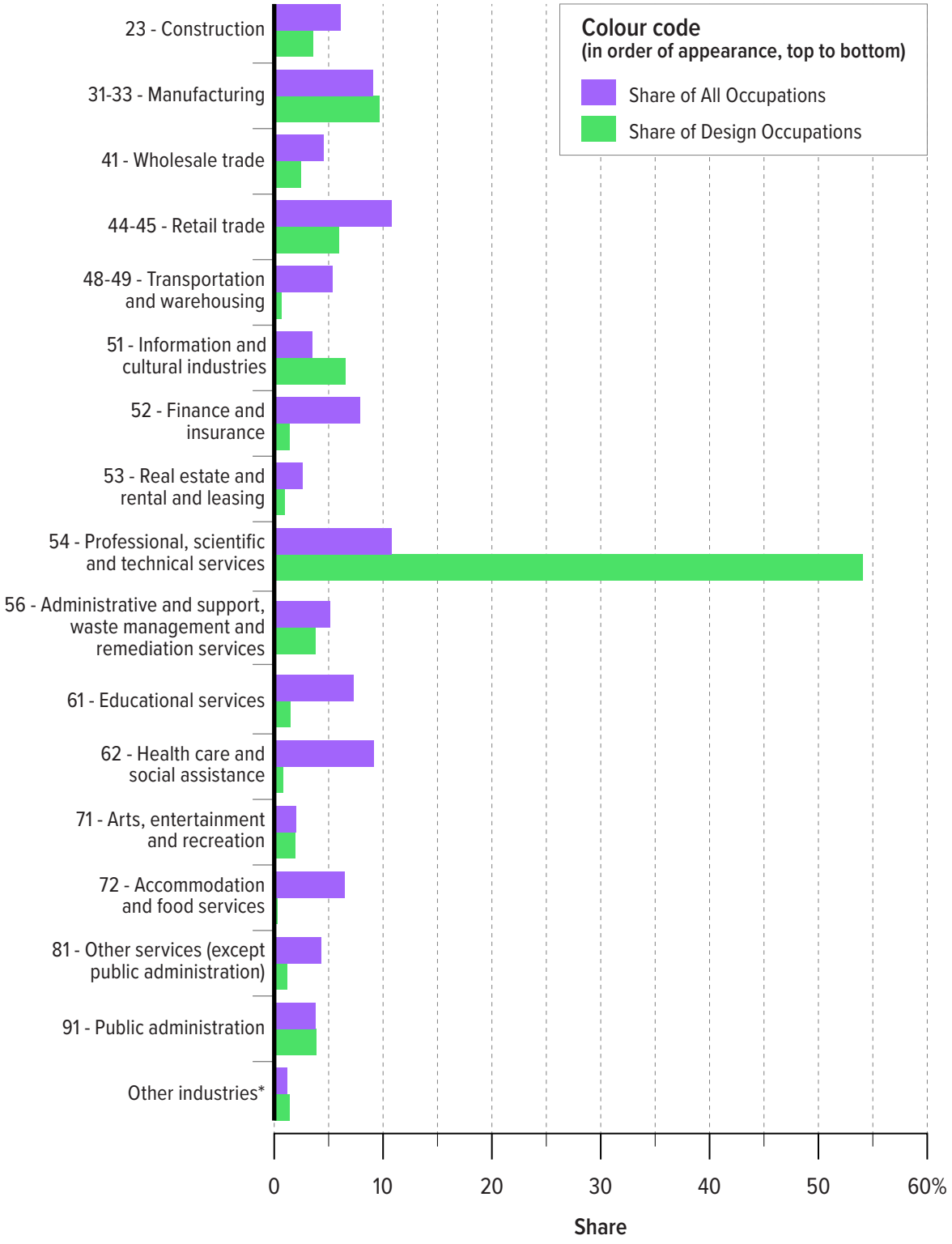
Workers in Toronto

The breakdown of occupation by industry using the 2016 Census allows for a comparison of the industries for those working in a Design Occupation. The chart below shows the distribution of all workers across Toronto and the distribution of Design workers across the region's industries. While Toronto's overall industry employment mix is higher in a few areas, between 100,000 and 200,000 people work in most industries.

Design employment is heavily concentrated in Professional Services, followed by much lower shares in Manufacturing, Information/Culture, and Retail.

"Our problem is that the designers that are working today don't fully embrace you know the industry they're in."

Figure 3. Share of All Occupations and Design Occupations by Industry



*Other industries contains the following: 11 - Agriculture, forestry, fishing and hunting; 21 - Mining, quarrying, and oil and gas extraction; 22 - Utilities; and, 55 - Management of companies and enterprises

Design in Toronto

Design Industry

Industry Size

While Toronto accounts for roughly one-third of all employment at Design firms, the table below shows that Toronto has a lower share of smaller firms (under 50 employees) and a much larger share of firms with 50 or more employees. Toronto is a Design hub for Canada, accounting for over half of all Design firms with 100 or more employees.

Table 6. Industry Size by Number of Firms and Employee Count

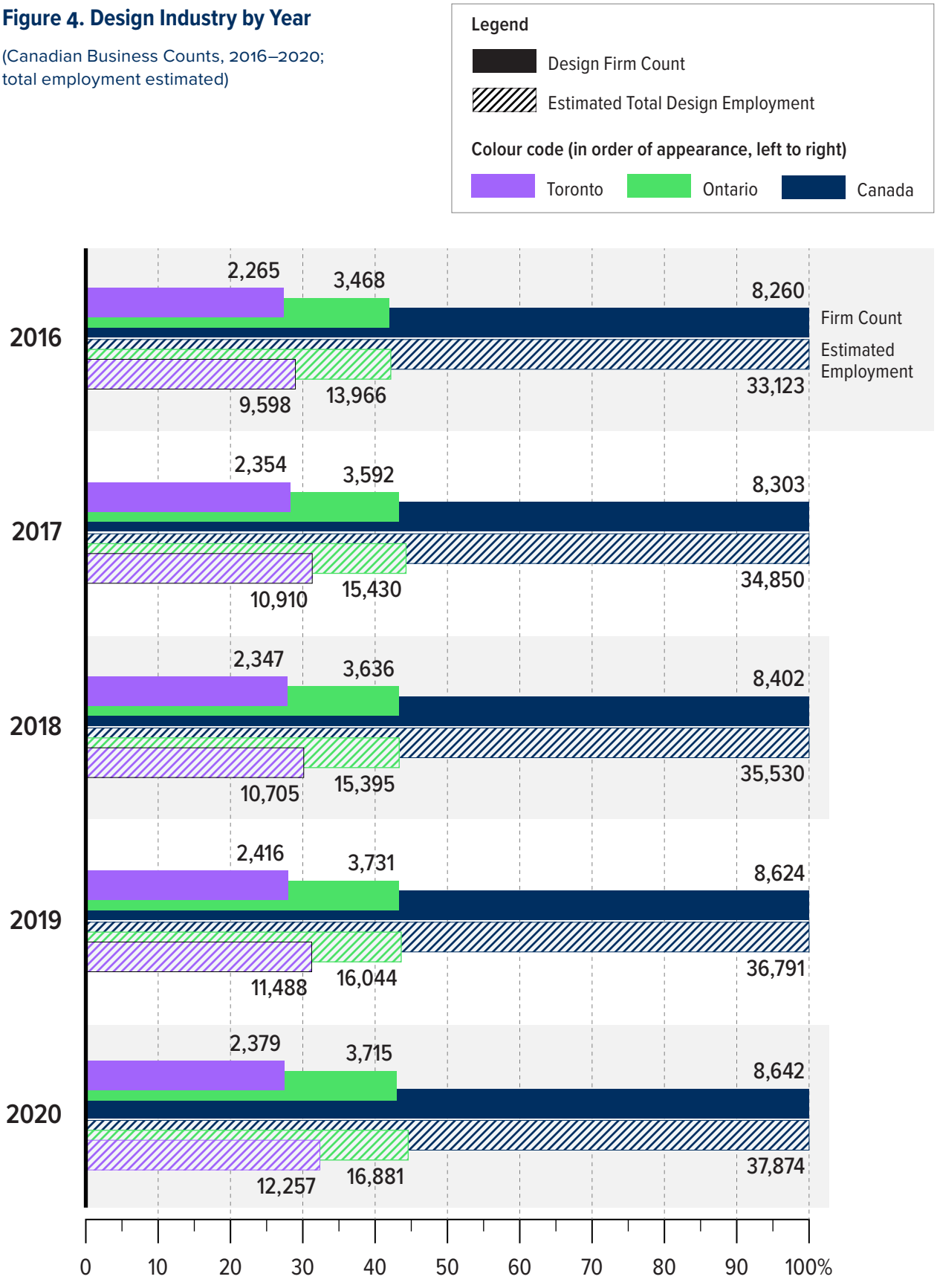
(Canadian Business Counts, 2020; total employment estimated)

	Canada	Ontario	Toronto	Toronto % of Canada
Estimated Total Design Employment	37,874	16,881	12,257	32.4%
By Number of Firms				
Without Employees	22,783	9,929	6,384	28.0%
With Employess	8,642	3,715	2,379	27.5%
By Employee Count				
1–4	6,151	2,711	1,738	28.3%
5–9	1,394	549	333	23.9%
10–19	676	281	187	27.7%
20–49	320	124	76	23.8%
50–99	69	32	27	39.1%
100–199	23	12	12	52.2%
200–499	7	4	4	57.1%
500+	2	2	2	100.0%

Figure 4 shows the number of Design firms (solid) and total employment (lines) over time for Canada (blue), Ontario (green) and Toronto (purple). The length of each bar is the percentage of the Canadian total. While the number of firms has remained generally stable, employment has grown over time with Toronto comprising an increasing larger share of the total.

Figure 4. Design Industry by Year

(Canadian Business Counts, 2016–2020; total employment estimated)



Design Industry Employment Growth

Between 2016 and 2020, Toronto accounted for 56% of all Canada-wide employment growth in the Design Industry.

Figure 5. Design Industry Employment Growth Across Canada

Total growth from 2016–2020 across Canada was 4,751 people.

Design Companies

While most firms are categorized as Architectural Services, many are multi-disciplinary and provide a wider range of Design services. The appendix lists the top firms by number of employees by primary industry.

Table 7. Top 20 Design Companies by Revenue

(City of Toronto only; D&B Hoovers)

Company Name (Total = 2,080)	Employees (All Sites)	Employees (Single Site)	Revenue (USD)	NAICS 2017 Description
Total (Top 250) — 248 firms	**7,401**	**5,264**	**1,562M**	
Ingenium Group Inc	1000	1	190M	Architectural Services
The Interpublic Group of Companies Canada, Inc	300	5	65M	Graphic Design Services
HOK Architects Corporation	227	102	39M	Architectural Services
NORR Limited	220	192	41M	Architectural Services
Daniels LR Corporation	200	200	34M	Architectural Services
Adamson Associates	200	0	34M	Architectural Services
Event Rental Group GP Inc	180	180	116M	Interior Design Services
Zeidler Partnership Architects	180	95	34M	Architectural Services
Diamond and Schmitt Architects Incorporated	135	135	23M	Architectural Services
CORE Architects Inc	115	115	19M	Architectural Services
Allied Technical Sales Inc	115	115	21M	Architectural Services
KPMB Architects	101	101	17M	Architectural Services
Quadrangle Architects Limited	100	100	17M	Architectural Services
WZMH Architects	80	70	13M	Architectural Services
Pigeon Brands Inc	80	60	15M	Graphic Design Services
HDR Architecture Associates, Inc	77	77	13M	Architectural Services
Gensler Architecture & Design Canada, Inc	70	70	12M	Architectural Services
Planning Alliance Inc	60	60	10M	Architectural Services
Hariri Pontarini Architects LLP	60	60	10M	Architectural Services
Moriyama & Teshima Architects	60	6	10M	Architectural Services

Design Occupations

Total Workforce (2016)

While nearly three-quarters of those working in a Design Occupation are employed by a firm, just over one-quarter of Toronto's Design workers are self-employed. The rate for self-employment is higher for Design workers than workers in general and is higher in Toronto than across the rest of Canada. Across all workers 12.7% in Toronto are self-employed while it's 12.0% across Canada.

Table 8. Total Workforce (2016)

	Canada	Ontario	Toronto	Toronto % of Canada
Total Design Workers	236,090	89,285	51,065	21.6%
Employee	179,785	66,575	37,665	21.0%
Self-Employed	56,305	22,715	13,415	23.8%
% Self-Employed	23.8%	25.4%	26.3%	
Average Income	50,288	51,113	53,340	106.1%
Median Income	44,209	44,891	46,054	104.2%

The rate of self-employment among Design Occupations varies across the occupations (below). While not quite half of all Interior Designers are self-employed, close to one-third of Graphic Designers, roughly one-quarter of Architects, and less than 10% of Urban Planners are self-employed.

"There's this kind of tech and innovation that is happening that I believe will become more prominent where people will see more opportunities to be running their businesses from the entrepreneurial perspective, as opposed to a mass company."

"We understand what it's like to have a small family and working, and we don't want to run a sweatshop. We want to keep and maintain a balance—it's part of our philosophy in terms of health and wellness and keeping people at their best and inspired."

Self-Employed (2016)

Table 9. Share of Self-Employed by Occupation (2016)

Occupation	Share Self-Employed
Interior designers and interior decorators	44.0%
Theatre, fashion, exhibit and other creative designers	36.7%
Graphic designers and illustrators	29.4%
Architects	26.7%
Landscape and horticulture technicians and specialists	24.9%
Landscape architects	23.4%
Graphic arts technicians	22.6%
Patternmakers — textile, leather and fur products	21.9%
Industrial designers	21.4%
Architectural technologists and technicians	19.1%
Land surveyors	9.9%
Urban and land use planners	8.8%
Drafting technologists and technicians	8.3%
Supervisors, textile, fabric, fur and leather products processing and manufacturing	7.4%
Architecture and science managers	4.7%
Land survey technologists and technicians	3.9%

Design Workforce by Age (2016)

Toronto's Design workers are slightly more likely to be younger (25–34) or older (75+) and a little less likely to be 35–44 or 55–64.

Table 10. Design Workforce by Age (2016)

	Canada	Ontario	Toronto	Toronto % of Canada	Share of Design Workers	Share of All Toronto Workers
All Design Workers	236,090	89,285	51,065	21.6%	51,065	21.6%
15–24	**18,210**	**7,835**	**4,135**	**22.7%**	**8.8%**	**12.5%**
15–19	1,405	635	295	21.0%	0.7%	3.6%
20–24	16,790	7,185	3,835	22.8%	8.0%	8.9%
25–64	**209,010**	**77,715**	**45,085**	**21.6%**	**87.0%**	**83.4%**
25–34	67,605	25,450	15,680	23.2%	28.5%	22.0%
25–29	32,475	12,635	7,775	23.9%	14.2%	11.0%
30–34	35,155	12,820	7,940	22.6%	14.4%	11.1%
35–44	59,560	20,600	11,970	20.1%	23.1%	21.8%
45–54	48,805	18,905	10,695	21.9%	21.2%	23.7%
55–64	33,020	12,780	6,705	20.3%	14.3%	15.9%
65–74	**7,745**	**3,220**	**1,565**	**20.2%**	**3.6%**	**3.6%**
75+	**1,115**	**515**	**280**	**25.1%**	**0.6%**	**0.5%**

"Our interest in New Canadians is to take positions that old Canadians don't want to take."

"We could be in a golden age of education, except, we have a college system and the colleges don't talk to one another, they don't collaborate about building content and career paths and things like that so until that changes we're going to have, at least in some respects the same problem [of gaps between students and employers]."

Educational Attainment (Toronto, 2016)

Design workers are generally well-educated:

- 87.9% have at least some post-secondary education (67.5% for Toronto)
- 86.1% have a certificate, diploma or degree (63.1% for Toronto)
- 53.2% have a bachelor's degree or above (40.2% for Toronto)

Table 11. Breakdown of Educational Attainment (Toronto, 2016)

Highest Education	Design Share	Toronto Share
No certificate, diploma or degree	1.8%	8.2%
Secondary (high) school diploma or equivalency certificate	10.3%	24.2%
Apprenticeship or trades certificate or diploma	1.8%	4.4%
College, CEGEP or other non-university certificate or diploma	29.1%	20.0%
University certificate or diploma below bachelor level (less than 4 years)	3.8%	2.9%
University certificate, diploma or degree at bachelor level or above	53.2%	40.2%

Education by Occupation

Level of education varies by occupation but a bachelor's or even master's degree may be a requirement in the regulated industries.

- Nearly all Architects, Landscape Architects, Urban Planners have at least a BA
- Roughly half of Interior, Industrial and Graphic and a few technical occupations have a BA
- Less than half of some technical Design occupations have a BA

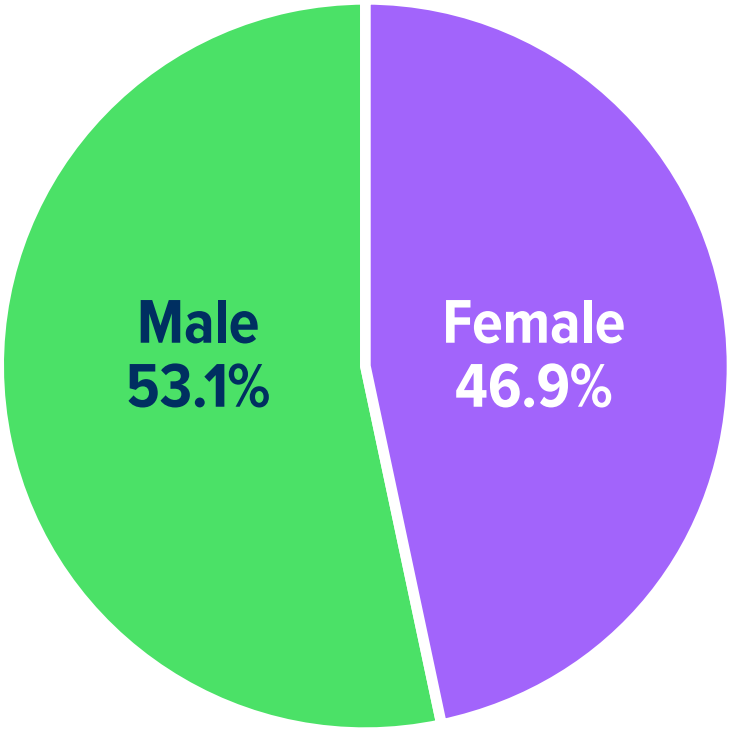
Table 12. Breakdown of Education Attainment by Occupation

Occupation	Under BA	BA or Above
Architects	7.5%	92.5%
Landscape architects	9.9%	90.1%
Urban and land use planners	12.6%	87.4%
Architecture and science managers	14.4%	85.6%
Industrial designers	41.7%	58.3%
Land surveyors	41.7%	58.3%
Architectural technologists and technicians	46.8%	53.2%
Interior designers and interior decorators	52.4%	47.6%
Drafting technologists and technicians	53.8%	46.2%
Graphic designers and illustrators	57.0%	43.0%
Theatre, fashion, exhibit and other creative designers	60.0%	40.0%
Graphic arts technicians	64.9%	35.1%
Land survey technologists and technicians	66.7%	33.3%
Landscape and horticulture technicians and specialists	70.8%	29.2%
Supervisors, textile, fabric, fur and leather products processing and manufacturing	82.6%	17.4%
Patternmakers — textile, leather and fur products	88.9%	11.1%

Gender (Toronto, 2016)

Slightly more than half all those working in Design are men.

Figure 6. Gender Breakdown (Toronto, 2016)

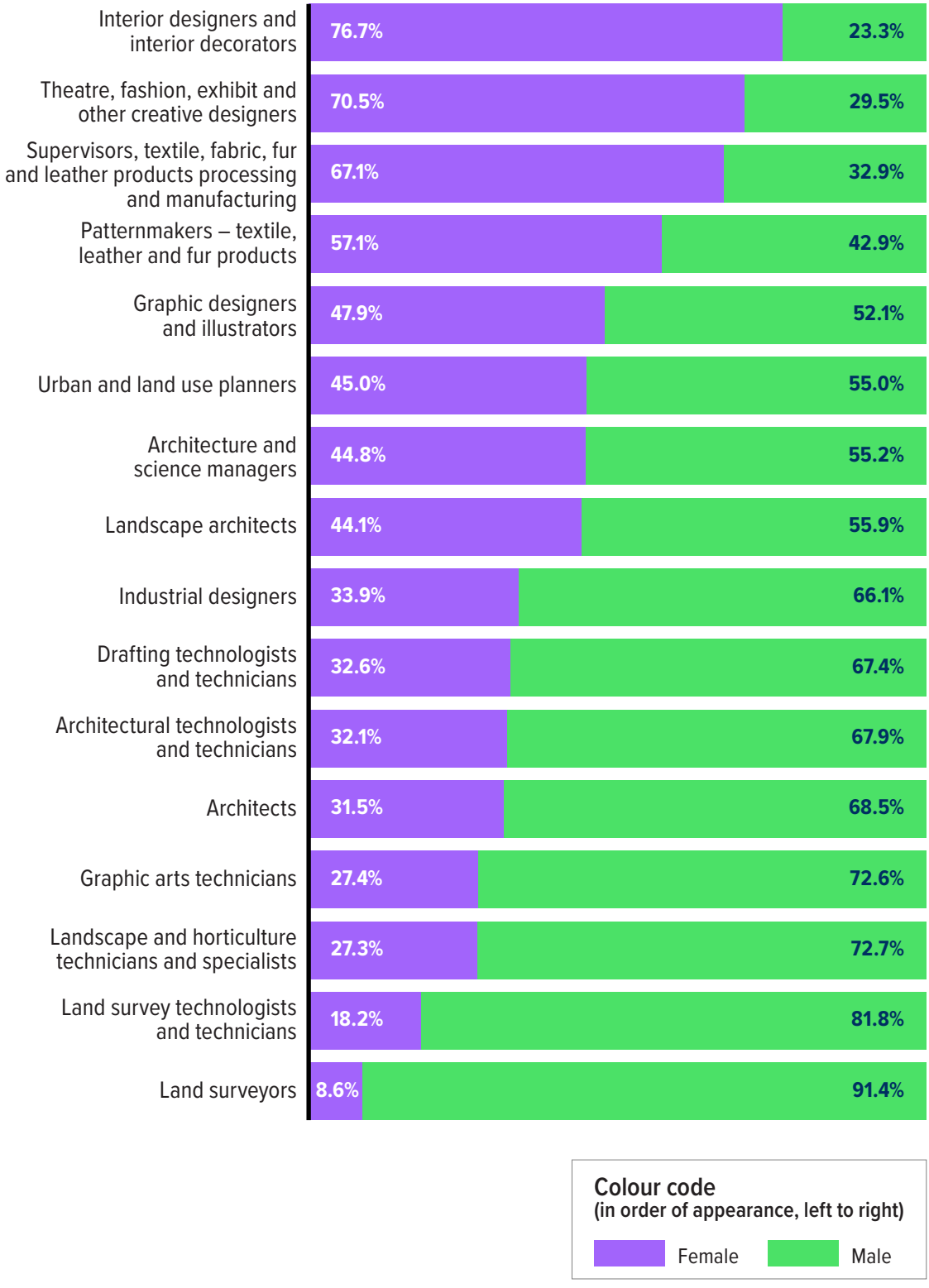


Women are the majority of those working in Interior Design, Theatre and Fashion Design, as Textile Supervisors and Patternmakers. The split is close to 50/50 for Graphic Design, Urban Design, Architectural Managers, and Landscape Architects. Men comprise over two-thirds of Industrial Designers, Drafting Technicians, Architectural Technicians and Architects; nearly three-quarters of Graphic Arts Technicians, Landscape Technicians and Land Survey Technicians; and over nine in ten Land Surveyors are male.

"In recent years I've seen many more women in Industrial Design. I've worked with ACIDO for years, and it used to be all men. Their AGM would be a room full of guys."

Gender by Occupation

Figure 7. Share of Gender by Occupation



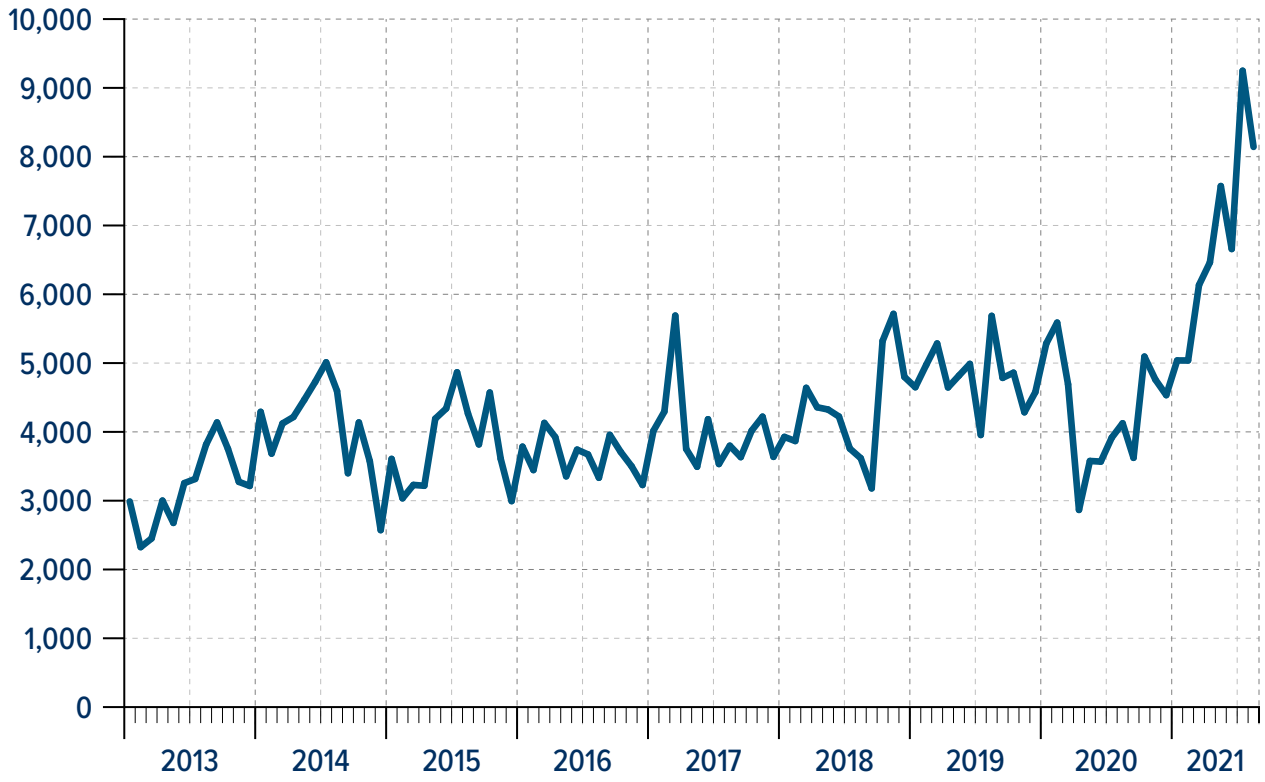
Design Job Postings

From Burning Glass, for the Toronto metro area (CMA).

Job Postings 2013–2021

- The number of postings was consistently between 3,000 and 4,000 per month through 2018.
- In 2019, it increased to around 5,000 per month.
- Dropped back down in 2020 (Covid).
- Rose steadily between May 2020 and July 2021.
- By mid-2021 was at 8,000 to 9,000 job postings per month. July 2021 was 9,249 and August 2021 was 8,142.

Figure 8. "Design" or "Architect" Job Postings (2013–2021)

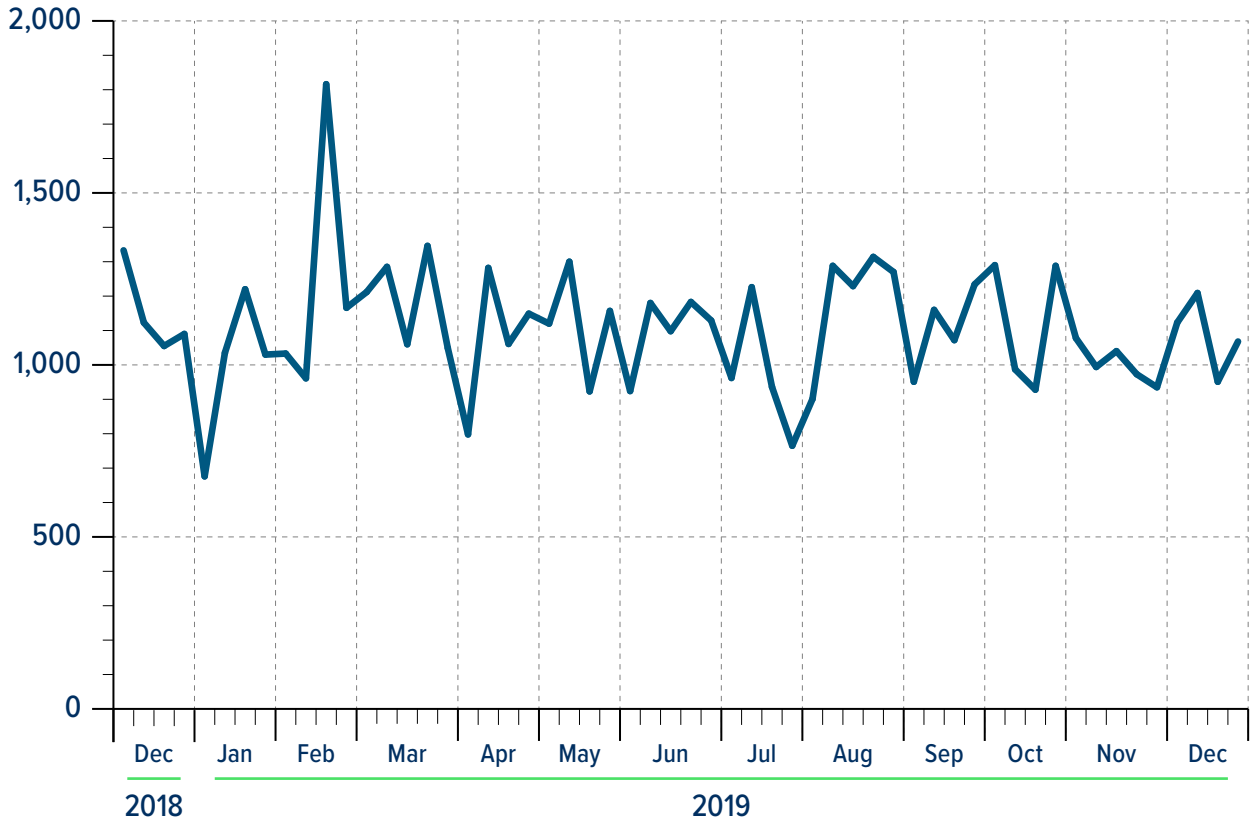


"I don't think there's a good awareness of the jobs in the industry."

Job Postings (2019)

- Average number per week 1,107
- Highest number 1,816 (February 16)
- Lowest 676 (January 5)
- Overall, generally between 1,000 and 1,200
- Steady but trending level throughout the year

Figure 9. "Design" or "Architect" Job Postings (2019)

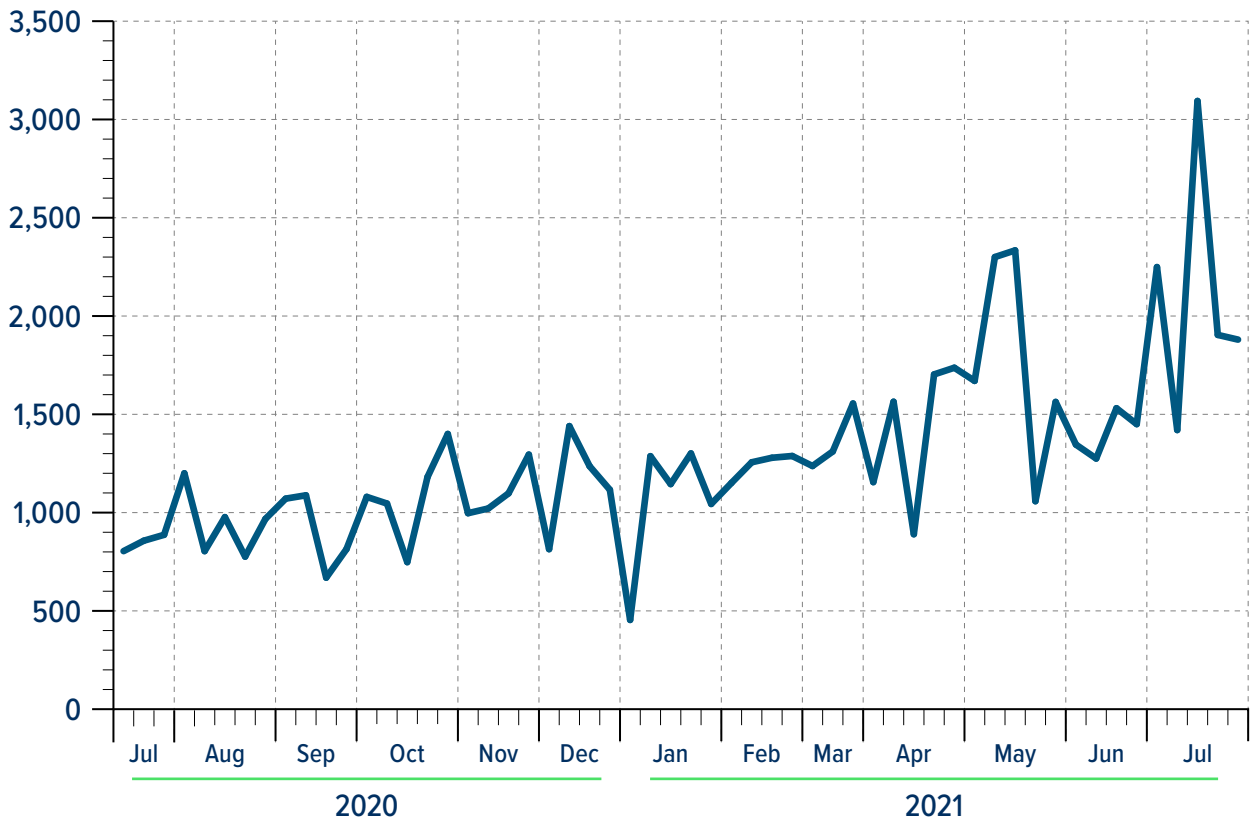


"We are still hiring, yes; we are still expanding and, yeah, so we are still continuing to hire."

Job Postings (July 2020 to July 2021)

- Average number per week 1,282
- Highest number 3,094 (July 17, 2021)
- Lowest 454 (January 2, 2021)
- Increased by about 20 jobs per week on average
- Increased nearly 1,000 jobs from about 750 in July 2020 to 1,750 in July 2021

Figure 10. "Design" or "Architect" Job Postings (July 2020 to July 2021)



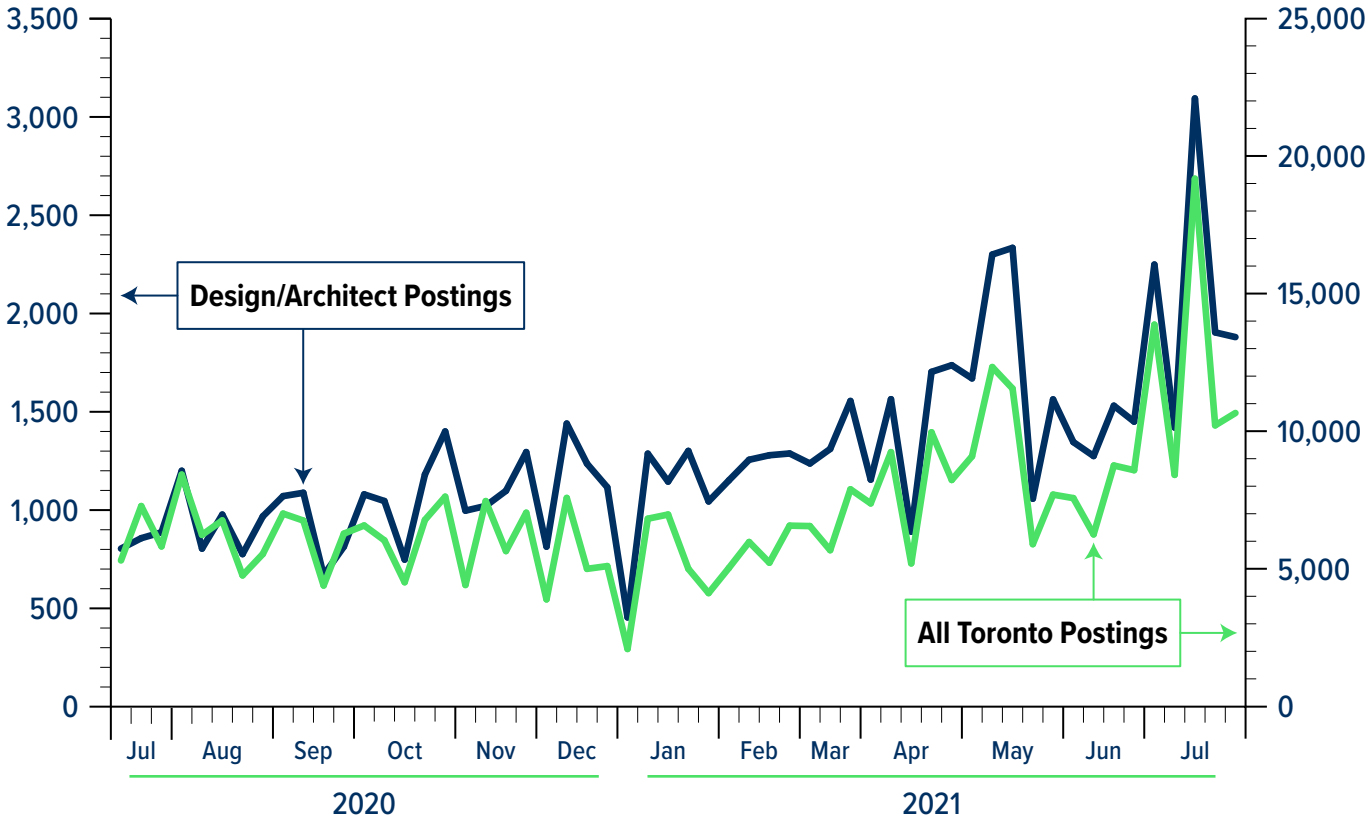
"We want generally for people to live within a commute of the Office whether we're working remotely or not, because we hope not to always be working remotely so you know we're hiring now."

Figure 11. All Toronto Job Postings (July 2020 to July 2021)

Growth in postings is not limited to Design jobs.

"Those [transit infrastructure projects] are a great opportunity that that will be long, long term growth for both employment from design right down to construction."

Figure 12. Trend comparison of All Toronto Job Postings and "Design" or "Architect" Job Postings



Looking the 12 month period, you can see how Design/Architecture was tracking with all postings but then jumps higher and stays above (relatively speaking since the number of postings is always higher for all). The interviews indicated that this higher level is partly influenced by the significant investments in infrastructure that have recently occurred. Although at a slightly higher level, Design/Architecture job posting activity still tracks to overall number of postings. So, the growth in the number of job postings most likely reflects the overall job market rather than something specific to the Design Sector.

"Coming out of the pandemic, a lot of firms [were] nervous [about] acquiring [new employees], or even getting a job because [no one knew] what the market [was] like and how much work [would or wouldn't] be [available]."

Job Postings by Industry (NAICS)

Design-related job postings by industry have mostly been in Finance and Insurance (mostly Banks). While Finance and Insurance account for 23% of all Toronto job postings, the industry was the source of over 36% of Design jobs. Design also accounts for a larger share of job postings in the Professional Services and Information industries and Retail. While the share of Design job posts in Manufacturing is slightly lower than for the Toronto region overall, nearly 11% of Design jobs posted were in the Manufacturing industry. Manufacturing includes specific industries for semiconductors, pharmaceuticals, motor vehicles and navigational instruments.

Table 13. Job Postings by Industry (NAICS)

NAICS Code	Industry Sector	Total Postings	Share of Design	Share of All Postings
52	**Finance and Insurance**	**9,392**	**36.38%**	**23.0%**
	Banks	6,138		
	Insurance	1,813		
54	**Professional, Scientific, and Technical Services**	**7,485**	**29.00%**	**23.3%**
	Architecture, Engineering	1,989		
	Management Consulting	1,770		
51	**Information**	**3,659**	**14.18%**	**8.5%**
31–33	**Manufacturing**	**2,790**	**10.81%**	**11.6%**
	Includes semiconductors, pharmaceuticals, motor vehicles, navigational instruments			
44–45	**Retail Trade**	**2,487**	**9.63%**	**6.8%**

"I feel like it's pretty rare that people are going into a mainstream industry kind of position—like most of the people in those jobs have been there for a couple of decades."

Job Postings by Occupation

In looking at the high-level occupational categories for Design-related job posts, the share of jobs in each category is generally the same for Design jobs as for all jobs posted. Natural and Applied Sciences jobs make up a slightly larger share as do Business and Finance occupations. Trades and Transport, Manufacturing and Health occupations are slightly less.

Table 14. Job Postings by Occupation

NOC Family	Family Description	Total Postings	Share of Design	Share of All Postings
2	Natural and applied sciences and related occupations	28,967	45.51%	44.40%
0	Management occupations	12,992	20.41%	21.00%
1	Business, finance and administration occupations	8,222	12.92%	12.60%
6	Sales and service occupations	4,127	6.48%	6.70%
4	Occupations in education, law and social, community and government services	4,115	6.47%	6.30%
5	Occupations in art, culture, recreation and sport	2,374	3.73%	3.80%
7	Trades, transport and equipment operators and related occupations	1,528	2.40%	2.60%
9	Occupations in manufacturing and utilities	731	1.15%	1.40%
3	Health occupations	295	0.46%	0.70%
8	Natural resources, agriculture and related production occupations	293	0.46%	0.50%

"[If] you have a leadership potential you are eligible for additional jobs that may not be with your skill set."

Design Saved Our Company

Copernicus Educational Products (https://www.copernicused.com/), a Certified B Corporation[6] in Arthur Ontario, designs and manufactures educational classroom teaching aids and furniture. They have manufacturing facilities in Ontario and a dedicated factory partner in China and sell their products around the world.

When Covid-19 hit, they found themselves selling products that were no longer needed as students in their major markets shifted from the classroom to the kitchen table.

As Kaylyn Belcourt, President of Copernicus Educational Products, put it "when the pandemic hit, it impacted everybody in the whole company. It was, 'everybody's a designer now, and we need to figure this out'." Kaylyn started at Copernicus as an Industrial Designer in 2007.

With schools closed and transportation shut down, the company was worried that sales and revenue would drop to literally zero overnight. The company called a (virtual) "all hands" team meeting where everyone focused on what schools would need to be able to reopen safely.

Because they had access to their own production facilities and available sourcing, Copernicus quickly transitioned to newly (or soon to be) needed products. They completed smaller runs of new products focused on school specific needs so they could see what would sell while keeping the production staff employed.

"We launched like 40 new product skus in six months." And had enough in sales of new sanitizing and related products over the next eight months to end up only 10% under what the company had originally planned in sales for the year, far better than they thought it might be when Covid hit.

Through its dealer network, Copernicus heard over and over how they were the only company with needed products available right now. Competitors could only promise products for the next year. By understanding the impact of the situation, leveraging the opportunity of design, and making everyone a designer, Copernicus thrived in an extremely challenging situation.

"We had the in-house [design] capability to immediately start to focus on those [new Covid-related products] and act."

"Design saved us."

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6 "Certified B Corporations are leaders in the global movement for an inclusive, equitable, and regenerative economy." https://www.bcorporation.net/en-us/certification

Trends and Foresight

Thirteen hours of interviews and numerous other informal conversations generated nearly 700 pages of transcript and 180,000 words. The word cloud below summarizes the frequency of individual words from those interviews. The larger the word; the more often it was used by the interviewees.

Figure 13. Interview Words

> “I had somebody call me who’d been in the industry for a long, long time, and he said it’s not enough to have diversity on the table, we need to be sitting at the table.”

The three sections of the interview (the full protocol is in the appendix) resulted in comments that could be grouped in the following ways. The emergent topics were identified by considering comments made during the interview independent of the questions, and grouping related comments together thematically.

Table 15. Emergent Topics

Interview Section	Emergent Topics
Design Sector Trends	• Positive Trends • Challenges • Changing Nature of Work (Impact of Covid) • Small/Large Firms
Labour Market (Supply and Demand)	• Labour Market – Job Searching/Hiring • Students • Gaps • Hiring • On-Boarding • Mobility
Inclusion and Design	• "Checkbox" Diversity • Inclusion is an Action • Educational Institutions • Diverse Hiring • Women in Leadership • New Canadians

The sections below highlight comments by topic within each of the sections. A particular comment could have been made once or thirteen times. The validity of a thought or idea is not determined by the number of times it was said — it is the unique contribution that thought provides to further the overall understanding of the current state of the Design Sector in Toronto.

Additionally, threads of thought wove throughout the topics or were important enough to warrant special mention.

- The Design Sector in Toronto is on a good trajectory. Have been doing the right things for a long time. For some, thinking across all industries has transitioned from 'design is nice to have' to 'design is a need to have'. Many companies have a better understanding of the long shadow design casts on cost and profit.
- Toronto is a global Design hub — especially (but not only) around infrastructure, which is fueled by infrastructure investment. Toronto

"We have an Australian project run out of the Toronto office with a British designer."

has a 'thick' labour market for designers — lots of opportunities to work lots of different places which makes it both attractive as a place to work and efficient from a job market perspective. And, Toronto's multi-culturalism and diverse residents automatically creates diverse teams.

- Companies are very busy but are mostly building temporary instead of permanent capacity. This means more opportunities for gig-based work, but available consultants or freelancers with specific, desired skills are harder to find. As a result, some companies are shifting away from freelancers because of lack of meaningful results, problems with integration and freelancers lacking integration skills.
- Shortages are reported in available workers by the interviewees, but companies are only looking for experienced hires (5+ years) due to on-boarding problems (especially for remote and hybrid work). Recent graduates are available but are not of interest to employers. Some employers are taking the long view and hiring recent graduates to grow into needed role in 5+ years because they do not expect the situation to improve any time soon. Companies generally find it even more difficult to on-board new hires remotely. Bigger firms have more resources and capabilities for on-boarding new hires and so are doing more hiring (proportionally). Many firms have shifted much of the on-boarding training to colleges and universities to reduce new hire costs, but it's not entirely clear how aware the educational institutions are about this.
- Interviewees that were hiring reported that students are lacking WIL (work-integrated-learning) experience and opportunities and have little awareness of job or internship opportunities. Employers find students need a better balance among art vs. design vs. production knowledge and skills. The current focus is too heavy on the art and not heavy enough on production knowledge — beautiful portfolios without any real understanding of how the things shown in the portfolio are actually made.
- Employers expressed a desire that students demonstrated understanding the full product lifecycle, what goes into creating an industry — the whole value chain. Separate firms have been created to provide specific design and design-manufacturing technology skills that designers don't have. While employers would like for designers to have more technical know-ledge skills, designers that become too technically skilled get pigeon-holed and find it hard to advance as technical and trade knowledge can be seen as a stigma and weakness since someone is not focused solely on design.

- Inclusion creates real benefits and is not just about meeting minimum requirements. Inclusion generates innovation. Diversity lends perspectives. Inclusion generates inclusion. Not being fully inclusive is an impediment to forming, growing, sustaining a business.
- People reported finding it difficult to understand who is doing what with regard to equity, intersectionality, diversity. Most companies do 'head hunting' rather than 'farming' for diversity. Need greater diversity in the classroom to get greater diversity in the profession. Interviewees reported that public, non-profit, professional and educational institutions care a lot but don't make any progress on diversity and inclusion.
- Hiring new Canadians is the best investment but is hard to do. Credential changes are upcoming on Canadian experience requirements — actual changes to be determined, but very high membership fees and other financial barriers to new Canadians will still exist in many of the Design professions.

"If you want to work with Indigenous designers there are different sets of values that means you're going to have to change the way you work and it's not easy, I know. "

Design Sector Trends

Positive Trends

- Growth is exciting
- Designing for impact
- On a good trajectory. Have been doing the right things for a long time.
- Design saved the company (Copernicus sidebar)
- Better understanding of the long shadow design casts on cost and profit
- Transition from 'design is nice to have' to 'design is a need to have'
- Toronto is a global Design hub — especially around infrastructure — and this is fueled by infrastructure investment
- Optimistic outlook especially from infrastructure and transit investments
- Understanding that design does not have an absolute right answer but can identify many absolutely wrong ones
- Design including carbon cost calculations
- CSR signoff on design for sustainability

Challenges

- Overcoming the Canadian mindset of 'not as bad as...' instead of 'better than...'
- Succession planning for the next leadership generation — keeping the firm viable
- Environmental sustainability and health impacts (forgotten temporarily but not gone)
- Social responsibility beyond environmental
- Leveraging the value of design and implementing a design tax credit (like Quebec)
- Creating equity by building back better
- Salaries, cost of living, cost of Toronto (GTHA)
- Affordable housing
- Digital divide — somewhat within Toronto but also outside of urban southern Ontario
- Covid to result in conversion of office space to residential space
- Covid has created greater interest in and dependence on the public realm — more walking

Changing Nature of Work (Covid)

- Projects are becoming faster and more numerous
- More work is being done but it is more focused and specific
- Can design here but make anywhere
- Separate firms to provide specific design and design-manufacturing technology skills
- Online provides incredible reach
- Online allows for selling directly to consumers (products — industrial, fashion)
- Have to balance office and home office
- Lots of gig-based work but consultants or freelancers with specific, desired skills are harder to find

"There's an element of being in person with design that is hard to completely accept an entirely remote kind of position."

- Shifting away from freelancers because of lack of meaningful results, problems with integration and freelancers lacking integration skills
- Better equipment, technology and programs make it easier and more efficient to work from home
- More training on new software is needed

Small/Large Firms

- Businesses are bigger, larger
- We have an Australian project run out of the Toronto office with a British designer
- Advantages and disadvantages for both small and large firms when large, global firms acquire small, local ones
- Acquisitions can save failing firms while still maintaining their 'Canadian culture'
- A large firm can respond to an RFP/RFQ while a small firm can do the work
- Many large firms still have 'that 70's mindset' (especially as regards women and visible minorities) while small firms can be flexible, responsive and inclusive
- Being small is both a help and a hindrance—you must partner with a large firm to have any international standing or capacity
- Staying small allows you to focus on your design work and being excellent with that rather than having to focus on running a company

"A lot of the firms that were around 10 years ago 15 years ago are still around now. Most of them are growing, but I haven't seen a lot of merging happening in Toronto, at least."

Labour Market (Supply and Demand)

Labour Market

- Toronto has a 'thick' labour market for designers — lots of opportunities to work lots of different places
- Need people with a broad spectrum of knowledge — 'T-shaped'
- Need more boundary pushing/risk accepting clients
- Need to understand what goes into creating an industry — the whole value chain
- But, trade knowledge can be seen as a stigma and weakness — not focused on design

"On the design side, the challenge is we graduate a lot of design students, a lot of design students and there are not a lot of design shops [hiring recent graduates]."

Students

- Education takes at least three years to change, and it needs to
- Design students are taught to be artists and are not taught enough (if any) about production and need a better balance among art vs. design vs. production knowledge and skills
- Students leave school with different expectations about what it means to be a Design professional than what employers can offer
- Fewer students pursuing/completing industrial design education
- Lots of graduates and hard to get noticed or established
- Students have little awareness of job opportunities
- Students are lacking WIL (work-integrated-learning) experience and opportunities
- Difficult to get work experience and internships
- More mentors and mentorship opportunities are needed
- Students need to learn how to 'tell their story', not just build a portfolio
- Telling their story is especially challenging for racialized students

Gaps Between Job Seekers and Job Providers

- Developing a design mindset
- Understanding the world
- Understanding the full product lifecycle
- Design management
- Client management
- Relationship management
- Autonomy, independence — project/client management
- Real world constraints
- Risk taking
- Foundational knowledge (manufacturing, construction, sustainability)
- Technical knowledge skills
- Technical — computer program skills
- Building a 'portfolio' of (experiences) not just plans and drawings
- Experience, Canadian experience
- "Middle" skills/experiences
- 4+ years of experience
- Entrepreneurial skills
- Writing skills (especially English for diversity hires)
- Interpersonal skills, expressiveness, ability to do/handle critique
- Written and oral communications
- How to listen

Hiring

- Recruitment is hard; can't find a good fit
- Junior — intermediate positions hard to fill
- Needed skills (especially technical ones) not available in the market
- Can't find people with 4+ years of experience
- Shortage in available workers but only looking for experienced due to on-boarding problems (especially for remote work)
- Recent graduates available but not of interest to employers
- Some are hiring to grow into needed role in 5+ years
- Companies report needing capacity but are very slow to hire due to uncertainty
- Building temporary instead of permanent capacity
- Taking steps on improving retention: benefits, perks, focus, mission
- Location can be a recruitment challenge or draw

On-Boarding

- Firms reported difficulty in hiring new employees
- Much of the difficulty is with on-boarding new hires
- Even more difficult to on-board new hires remotely
- Firms have shifted much of the on-boarding training to colleges and universities as a way to reduce new hire costs — not entirely clear how aware the educational institutions are about this
- Bigger firms have more resources and capabilities for on-boarding new hires and so are doing more hiring (proportionally)

Mobility

- Everybody is moving
- Trained designers don't last in their professional field — many end up in other jobs
- More public ⟷ private pathways are needed (urban design and planning)
- Designers that become too technically skilled get pigeon-holed and find it hard to advance

"If you hire a senior person who knows the drill and so on it's easier to integrate but new people it's so difficult because as a young person, you need that personal connection and interaction and showing the ropes."

Inclusion and Design

"Checkbox" Diversity

- Diversity policies become just a label. Need to move beyond and identify ways to truly improve
- Have an inclusion policy, but it's still 'a work in progress'
- 'We have an internal Diversity and Inclusion Group'
- Working on US projects forces the creation of EDI (Equity, Diversity, Inclusion) paperwork 'proof'
- Don't understand who is doing what with regard to equity, intersectionality, diversity
- Need more tools to deal with EDI, especially around technology
- Customers (especially public/government) force inclusion
- Smaller firms report that they are more independent and more diverse
- Indigenous issues in hiring, promotion, representation, procurement processes, market reach are widespread across many facets of the Design Sector, but most are not unique to the Design Sector

"Our mandate is to prioritize Indigenous women and hiring Indigenous women so I'm sure that also adds an extra layer of making it challenging to fill the positions."

Inclusion is an Action

- Inclusion creates real benefits and is not just about meeting minimum requirements
- Not being fully inclusive is an impediment to forming, growing, sustaining a business
- Diversity lends perspectives
- Inclusion generates innovation
- The beauty of the design sector is that it already recognizes that there are so many voices that need to be heard
- Understanding that you are not the best opens you to inclusion
- 'It's not being done for me, so I'll do it' creates inclusion
- Meeting AODA and senior service disability requirements creates inclusion

- They might be invisible disabilities, but they still create inclusion
- Toronto multi-culturalism automatically creates diverse teams
- The diversity of Toronto can be leveraged to create greater innovation
- Inclusion generates inclusion
- “The industry [fashion] is already a rainbow of diversity”
- What’s needed now is a post-inclusion mindset
- You need post-EDI thinking

Educational Institutions

- Greater student diversity leads to greater industry diversity
- Need greater diversity in the classroom to get greater diversity in the profession
- Less Black talent is available, but less in the pipeline
- Need more international students to get more international hires
- Toronto Metropolitan University and others are great at attracting international students
- “All my classes [in graphic design] have more female students”
- Public, non-profit and educational institutions care a lot but don’t make any progress on diversity and inclusion
- A disconnect exists between the academic environment and industry
- Planning schools need a focus on equity/inclusion and not just on increasing land values

Diverse Hiring

- Diversity is important, but diverse candidates are hard to find
- Most companies do ‘head hunting’ rather than ‘farming’ for diversity.
- More need to be growing and farming qualified diverse employees.
- Qualified doesn’t mean employed
- Community volunteer work [especially for racialized people] becomes a disadvantage for being hired as the for-profit company assumes the hire only wants to work in the non-profit sector
- Some reverse discrimination was noted

Women in Leadership

- Have women in leadership/partnership roles already
- Developed succession planning and leadership opportunities for women and others through a leadership conference

- Overall challenges with developing leadership, but women in leadership is really challenging
- More discussion than action on women in leadership and succession planning

"Why did my success [as a woman] require a cheerleader that's a guy?"

New Canadians

- Hiring new Canadians is the best investment but is hard to do
- Sometimes easier to make foreign hires while they are still overseas
- Need to subsidize job market entry for new Canadians
- Specific outreach to new Canadians for job opportunities
- Help new Canadians get their 'foot in the door'
- Career Edge as a bridge for new Canadians
- Mentorship programs specifically for new Canadians
- Mentorship and internship opportunities for Canadian experience
- Multiple languages are a real Toronto advantage, but language challenges are an issue with diverse hiring
- New Canadians can be impaired by English proficiency
- Help new Canadians improve their English and be patient
- A local design credential can be a way to get recognition for international training
- Drop the 'Canadian experience' requirements — international companies don't care about Canadian experience
- Credential changes are upcoming on Canadian experience requirements — actual changes to be determined
- Very high membership fees and other barriers to new Canadians will still exist
- Recent immigrants generally find it more difficult to adapt to company and Canadian culture if they aren't working in an office around other people

Key Informants Interviewed

Greg Parsons, Perkins+Will
Sharon Mittmann, City of Mississauga (Urban Planning)
Udo Schliemann, Entro Communications
Laurie Belzak, City of Toronto (Economic Development and Culture)
Gelare Danaie, dexd (architecture and design)
Denise Santini, RED Studio Inc. Architects
Bob Kirke, Canadian Apparel Federation
Sage Paul, Indigenous Fashion Arts and Indigenous Fashion Week
Dylan Horvath, Cortex Design
Robert Walter-Joseph, Gladki Planning Associates
Kaylyn Belcourt, Copernicus Educational Products
Arlene Gould, Strategic Director DIAC and Design Educator and Researcher
Abigail Moriah, Black Planning Project

Design Industry Advisory Committee (DIAC) Board (Project Advisory Board)

Francesco Martire, Ontario Association of Architects, Ontario Association of Landscape Architects
Norm Lourenco, Association of Registered Graphic Designers
Laurie Belzak, City of Toronto
Tim Poupore, Association of Chartered Industrial Designers of Ontario
Lisa Fulford-Roy, Interior Designers of Canada
Scott Grant, Association of Chartered Industrial Designers of Ontario
Anna Kao, Ontario Association of Architects, Toronto Society of Architects
Sharon Mittmann, Ontario Professional Planners Institute
Greg Parsons, Interior Designers of Canada
Jimmy Rogers, Association of Chartered Industrial Designers of Ontario
Udo Schliemann, Association of Registered Graphic Designers
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