Background to the report

In November 2003 and December 2011 the DIA distributed its annual Fees & Salary Survey to designers around Australia. The surveys were sent to 8,100 and 15,800 design businesses, individuals and academic staff respectively.

Included in the surveys were some open questions about the design industry. Respondents were invited to comment on what they considered to be the important issues facing them as designers and those actions they would like taken to address them.

The questions were:

2003

Question 9: Issues - What are the important issues for the design professions at the moment?
Question 10: Actions - What needs to be done to improve the design professions?

2011/12

Question 12: Issues - What are the major industry and professional issues for the design professions at the moment?
Question 13: Technology - How are the internet, mobile applications and social media affecting your design profession?
Question 14: Support - How can the professional body best support your design discipline in the next five years?

A proportion of the respondents to the survey chose to reply to one or more of these questions. A table of the break down of responses by discipline is included as an example - see Table 1.

The questions were unconstrained. No examples were provided to define possible issues or actions. However it should be considered that the questions were attached to a survey requesting information on fees and salaries, and in 2011/12 Question 13 directly referred to technology and social media.

Method of analysis

The prose feedback provided by designers was entered into a database unedited. Each database entry included the viewpoint qualifications collected in the Fees & Salary survey. These are viewpoint (employment type), workplace, discipline and location. See Table 1.

Analysis by key words

The information offered by each respondent was assigned up to five characterising words to capture the essence of the issues or actions and allow for analysis. The characterising words were generated from key words in the responses rather than being a pre-generated list. See Key Word Definitions for a summary of the complete list and a brief definition of the comments characterised by them.

Some respondents supplied comments in bullet point form with each item confined to a specific issue. Others provided prose that flowed from one concern to another requiring characterisation by multiple key words. All responses had key words assigned by the author to ensure consistency of assignment.

The summarisation of the information by keyword specifically allows for quantitative analysis of the issues and actions and allows for comparative analysis between disciplines, employment types and location. It is also a record of the language used by designers to communicate their concerns.

Use of this data

Some care needs to be exercised in the use of the scores assigned to key words. Two aspects in particular are important. Some issues have been captured by more than one key word. For example Client Education was assigned to entries that specifically defined this segment as the target for educational campaigns while Public Education was used to characterise entries where the respondent was not specific about the education target or specifically wanted it to be the broader community. These two issues can be considered together making their collective score much greater.

2003 vs 2011/12

In 2003 the analysis was completed to a greater degree of detail to form a comparison benchmark. The 2011/12 responses were processed to determine issues that were new or had altered in their relative importance.
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Key word comparison of concerns - 2003 vs 2011/12

Shifting concerns 2003 to 2011/12

This chart shows the shift in designers’ concerns between the November 2003 survey and the December 2011 survey. The concern key words graphed are the top 10 raised in the 2003 survey plus 3 additional concerns that featured in the top 10 of 2011/12. In 2011/12 the preoccupation with the state of the economy shows up in a large increase in the use of this term in responses. This is coupled with the consequent concerns relating to fees, competition, availability of jobs, and the loss of work to overseas competition.
Executive summary

This report analyses professional concerns and issues raised by Australian designers taken from two surveys eight years apart.

An important aspect of these issues and concerns is what actions should, or can, be taken to address them?

This summary discusses the issues in terms of broader industry forces and trends, and proposes actions for the DIA, other design bodies, and designers to take. It establishes a dictionary of key words to quantify and discuss the concerns. The 2003 survey is used as a reference benchmark and comparison for the later survey.

While the concerns expressed by the design community are real, which of them are capable of moderation and which represent desires that can never be met or issues so embedded in broader societal shifts that they are beyond the resources of a single professional group to alter?

Many of the issues raised are familiar and constant and are repeated in material collected across decades of the Design Institute’s activities. Much of the design sector consists of micro-businesses so it’s not surprising that many concerns relate to issues that are universal in small business. (See business size tables at the back of this report.) In some cases the causes of the issues are not those proposed by the designers in their responses. And in many cases the remedies offered in survey responses ignore commercial, legal, human and global realities and would not have the desired result.

This is a discussion of the factors that affect the success of the design professions, their future viability and actions taken on their behalf.

Four external forces

The design professions are besieged by four major external factors:

- **The education industry** - the scale of the tertiary industry, government driven education goals, design education in secondary schools, and shifts in occupation preferences.
- **Technological change** - the computerisation of design processes, the displacement of trade skills into design, the de-skilling of design processes, and the accessibility of design tools.
- **International trade** - the loss of symbiotic industry sectors, the growth of production capacity in other countries, the decreasing cost of shipping, and exposure to remote competition through the Internet and telecommunications.
- **Media and communication change** - the growth of design related media and publications, mass exposure to design promotion through the education and technology industries, Internet exposure, and the shift to new media design skills.

While each of these external forces does result in employment opportunities for designers and design services the cumulative issue is that they drive the supply side - the attraction of new participants to design - far more than they drive demand for design services.

How many designers?

At the time of the December 2011 survey there were in excess of 160,000 Australians with tertiary qualifications in aesthetic based design areas (2011 Census). This number includes architects, interior designers and decorators, industrial designers, graphic designers, web designers, textile designers, fashion designers, jewellery designers, and landscape and urban designers. This means that 1 in every 140 Australians has design qualifications: 0.71% of the population. The Census does not reveal all those who did not complete their qualification.
Of these 160,000 potential designers around 89,000 had jobs in an ANZSCO listed design occupation. In many cases this job was a result of self-employment and more than one quarter of interior and graphic designers were in part time positions. The Census does not reveal the many thousands operating at the periphery of the design industry while employed in some other occupation.

It should, therefore, be no surprise that competition is the major issue for designers.

The symbiotic design professions

While there are numerous sub-specialisations the design professions can be divided into three broad groups; product or industrial designers, built environment designers (architects, interior designers etc), and graphic designers. It should be noted that the DIA is not the body generally responsible for architects (a significant aesthetic design specialisation) so they are not specifically analysed in this report. Many interior designers work in architectural practices or in close association with architects so comparisons with architects are offered in some cases.

Each design specialisation has a symbiotic relationship with a particular commercial activity: product design with manufacturing; interior design with building and construction; and graphic design more broadly with the sales and marketing activities of all businesses. The health of these host sectors is a significant factor in the fortunes of each design specialisation. For example textile design (a specialisation of product design) has become a marginal activity with the demise of Australia’s textile industry.

Often the concerns expressed by designers relate to issues their host sector is experiencing and can not be altered by changes in the behaviour or activities of designers.

This symbiotic relationship can be further complicated by the specifics of sector activities. For example industrial (product) design is a service only required by particular sub-sections of the
manufacturing sector, so an overall growth in manufacturing in Australia does not guarantee a rise in the requirement for industrial design.

**International supply**

The increasingly international nature of production and trade has obvious effects on the optimum location for a particular design service and its exposure to competition. While digital communications make it possible for Australian designers to supply services internationally the reverse is also true. The natural concentration of design services with their symbiotic industry means that the most nurturing environment for the service is close to the production location. This has been progressively demonstrated for Australian industrial designers watching first as larger local manufacturers built factories in low cost locations, then became comfortable outsourcing to other factories in those locations and finally allowed the remote factories to provide design services.

Even design disciplines that may seem insulated from international outsourcing are experiencing the effect. In the building and construction industry the supply of materials, furniture and custom fitments become increasingly easy to source internationally and harder to obtain from diminished sources of local production. Once again design services associated with these needs are transferring also.

In the area of graphic design sections of the Australian customer base see no barrier or commercial detriment to using remote designers or internet enabled services such as crowd sourcing to provide marketing and sales materials. Purchasers are becoming comfortable with digital transactions that include no face-to-face contact.

**Skills atrophy**

So most design specialisations are becoming exposed to international competition based initially on price and convenience. But as the international expertise rises due to greater availability of work and exposure to broader experience, these sources also compete on quality and competence. And in specialised design areas, requiring close links to production for skills development, soon surpass the skills and experience of local design services.

Once the host environment of a design service shrinks in Australia the tertiary education sector is unable to make up for the lack of mentoring and Qualifications vs jobs:

**Communication design and built environment design**

These graphs show the proportion of people with design qualifications who were employed in design from the ABS Census figures. The red area marked GRADUATES shows the progressive total of people with tertiary design qualifications since 1950 taken from the 2011 Census. The grey area marked JOBS shows the people actually working in a design occupation from the 1991, 1996, 2001, 2006, and 2011 Census data.

JOBS in the top graph (Communication design sector) is the total of graphic design, illustration, multimedia design and web design and contains a considerable percentage of part-time jobs (around 30%).

The bottom graph shows a plot of interior design and interior decoration, and a plot with architecture added to give a more realistic view of built environment design. The architecture qualification count is ASCED 040101, the interior plus architecture JOBS includes the ASCO count for Architectural Associate and the ANZSCO count for Architectural Draftsperson.
post tertiary training that occurs in the workplace to bring graduates’ skills up to commercial standard. This loss of workplace mentoring and training further weakens the average ability and competence of local design suppliers.

In broad terms the most exposed to international forces are product designers and the least affected are those whose services require direct interaction with a local customer, for example residential interior designers and graphic designers serving business customers needing custom design but not yet large enough to purchase internationally. Design services that are also closely involved in production supervision, such as those in the built environment (architects, interior designers), also have a degree of protection from international competition for small to medium projects.

**In-house vs out-source**

Another aspect of the availability of work for the design disciplines is the proportioning of work between in-house and out-sourced supply. As the portion of Australian manufacturing that requires industrial design services diminishes the remaining businesses tend to have in-house design staff or established relationships with overseas design and production sources.

For graphic design the relative affordability of an in-house designer has improved with a business only needing less than 500 hours of work per annum to make it a viable choice. The huge supply of graphic designers means that most businesses are aware of the skill set and can hire a designer at a modest wage level.

Commercial interior design, for most business customers, is an occasionally needed service and is less likely to be an in-house resource or subject to an established relationship.

**Recognition**

A common theme in the surveys of designers’ concerns is that the general population does not recognise their occupation or skills. Designers see this as a factor limiting job opportunities and the availability of consulting work. However the lack of work is the result of over-supply in most design specialisations. This oversupply has come about because of the progressive promotion of design as a professional activity since the 1950s, and the current desirability of the activity as a career choice for secondary students with creative skills.

Designers would also like the public to be taught more about design; key word - public education. The Australian Bureau of Statistics (ABS) through its statistical collection ANZSCO records participants in 1014 occupations. In addition, each of these 1014 occupations may have several related jobs or specialisations (for example textile design within industrial design) that are included within the occupation count because the numbers are too few (below 300) to warrant separate records. So there are ultimately some thousands of jobs in Australian society that a person could have an understanding of. In reality the community now has a high relative awareness of design as a job and it is improbable that disinterested people can be persuaded to achieve a more detailed understanding of it.

It is also very likely that the further promotion of design jobs and any gains made in the understanding of design will also attract more participants to the occupation, cancelling out any increased work volume.

**They need design**

Designers have culturally taken on a strong belief in the powers of design and design services to transform the outcomes of projects and the success of businesses. They believe strongly in the notion that ‘good’ design will pay dividends for the purchaser. Research from the Design Council in the UK did conclude that listed companies with strong design policies outperformed the average listed company.

The notion here is that design will always pay for itself and that every designer is skilled and experienced enough to deliver that benefit with certainty. The spread of design abilities and the range of project types make this unlikely. Design is also not the only determinant in project success. Commercial and private customers weigh up many factors, not the least of which is price, before deciding how to allocate resources.

In a saturated market, where the bulk of the untapped or potential customers may be in small business or be private individuals, the resources available for consulting services are likely to be limited. While these potential customers may agree that a better outcome will result from custom design they conclude that there is insufficient budget to warrant it and the off-the-shelf solution will suffice. Architecture is an excellent case study of this. Despite centuries of awareness of architecture most
building purchasers (home buyers) find off-the-peg designs satisfactory from both a functional and aesthetic point of view.

Job choices
Design attracts a lot of participants and the decision is made during secondary education. The narrowing of apparent job options occurs both in the advice available to secondary students and the courses offered in tertiary education. The family employment environment and personal experience also play roles. Of the several thousand possible job titles a secondary student could select as their career goal, one common job guide available to them for career choice lists around 500. Course subject areas and faculty titles in tertiary education institutions further narrow the apparent choices. Secondary students may not have the life experience or career advice to see past obvious study choices to more obscure jobs. Design (and in particular graphic design and interior design) has become a very visible study choice in comparison to the volume of jobs available.

Education volume
In our society an individual is entitled to aspire to, study and participate in whatever occupation they desire. As a wealthy society we have the freedom to encourage our children to pursue their dreams rather than a dependable income. At secondary school level, knowledge of the occupations available and the specific fortunes of each occupation is limited.

There can also be a belief that the existence of a tertiary course implies the existence of employment relating to it.

Design courses have proven very popular over the last three decades. Tertiary education providers have responded by making the product readily available, with the resulting flood of graduates. In the prolific area of visual communication/graphic design/digital media the number of providers continues to grow. In 2001 there were around 70 providers between universities, TAFEs and private institutions. By 2011 this had risen to 95. In interior design total course numbers rose from 26 in 2001 to 31 in 2011. But this is made up of a decrease in degree level courses and a threefold increase in TAFE courses. Industrial design shows signs of responding to the diminishing job availability with 20 courses on offer in 2001 now down to 14.

The profession has no power to directly modify the numbers of graduates produced. Only a clear message from the marketplace on job availability and remuneration levels will alter students’ decisions to purchase design education.

The ABS occupation statistics (ANZSCO) from the Census reveal those who have found employment in design, or consider themselves to be self employed. To see the tens of thousands of design graduates who have not found created design employment you must analyse the ABS ASCED education qualification statistics.
In the eight years between the 2003 and 2011 surveys the tertiary education sector graduated in excess of 18,300 graphic designers and in excess of 3,800 interior designers. The ASCED data does not capture those who didn’t finish their qualification or who have self-trained in design.

The ASCED data does not provide figures for industrial design. The ASCED classification system was published in 2001 and has significant deficiencies in its records of design education and is now badly out of date in terms of digital occupations such as web design. It does not directly align with either the ANZSCO record of occupations or the education sector’s records of education disciplines making it difficult to accurately assess graduate numbers in many areas.

**Education variability**

Tertiary education providers sell education to suit customers looking for a variety of cost points and time commitments. In unregulated occupations this creates a huge variability in the competence of people offering services. The design professions are powerless to moderate this unruly spread of education, or those who choose to self-train. This is at the core of concerns about standards.

It should be noted that the industry still contains many successful and professional practitioners who self-trained prior to the on-rush of design degrees in the 1980s, or learnt their skills through trade based employment or mentoring from existing practitioners.

Employers in the design professions do have one limited point of control to encourage higher skill standards. Degrees have become the arbitrary winnowing criteria when an employer is faced with a flood of applicants for a job. This forces students with serious aspirations to opt for the highest qualification. However it does nothing to modify the training level of those prepared to be self-employed.

**Education relevance**

Just as the growth in interior design education has been strongest at the TAFE level the growth in graphic design/visual communication courses has also occurred in this tier. This means large increases of graduates who have opted for a lower level of preparation for their vocation in an environment where employers have an oversupply of applicants at a higher training level.

Graphic design education providers have continued to deliver courses that focus strongly on print skills even when it has been apparent to the industry that print work is rapidly diminishing. Between 2001 and 2011 there was an increase from 61 providers in this area to 76, mostly from the TAFE and private sectors. This is another pressure point that highlights the symbiotic relationship between design skills and industry sectors. The offset printing industry sector is in decline taking many print design jobs with it.

**Demarcation**

Some designers have competition concerns about which professional or vocational group is entitled to provide a particular service. Many younger designers don’t appreciate that their specialisation is only a recent educational development previously provided by other training paths and other occupations. In some cases the new training emphasis displaces previous skills - not always to the benefit of the industry concerned. For example, industrial designers, in a search for viable employment in the manufacturing sector, have progressively replaced detail draftsmen but lack either the trades training or drafting training that these occupations received.

In some cases designers want restrictive conditions imposed to prevent others from providing services that they consider to be inferior to their own. In the example of the detail draftsmen they will have been equally concerned that those replacing them were under qualified for the activity. In general Australian society operates on free market economic principles and does not consider that the activities of designers represent a danger worth controlling through legislation or mandated educational requirements.

In the built environment building regulations and standards provide the protective framework for the community. While some interior designers consider areas of construction to be overregulated this standards framework provides them with some de facto protection from competition.

**Paraprofessionals**

Demarcation is also connected with the rise of the paraprofessional: a person of lesser training in a field who is competent to handle some of the work that doesn’t require the full knowledge of the primary professional in the area.

The trend in Australia is to deregulate occupational areas and expose them to competition where the risk to the public is minimal. While the relationship
between professional and paraprofessional may be clearly defined in an area such as medicine, in the design sector it has little meaning. An interior designer may consider a building designer or a decorator to be unqualified in interior design, but these alternate providers are under no obligation to refrain from providing services. In most areas of design there is now a range of business types, from a variety of different training sources and skill sets, that compete for the same pool of work.

Nomenclature creep

Another less obvious consequence of the tertiary education industry is the change of occupational status brought about by the shifting of skills to degree level. Interior decoration is on the wane as an occupation because of the pressure from interior design. Vocational education providers adopt the occupation name with the highest perceived status, both to boost the prestige of their courses and to give their students a boost in the job market. The skill set or education doesn’t necessarily change, just the name. But for the historical quirk of legislation that protects the term ‘architect’ university trained interior designers would have already moved to the name ‘interior architect’ further annexing an occupation area previously provided by architects.

Designers also participate in the naming creep in an effort to find commercial advantage in a competitive market. For example many graphic designers are now branding strategists. The changing of names adds to the public’s confusion about who does what and directly contributes to the lack of recognition that designers complain about.

Keeping pace

Technology continues to have a major impact on design. Over the last twenty five years computerisation has transformed the way designs are developed, recorded and communicated. Job responsibilities have been transferred from trades to the designer. Skill sets have been made irrelevant. Industrial designers and graphic designers were the early adopters of computer aided design with interior designers slower to computerise.

Technology has also enabled more competition. Easy access to sophisticated tools, often at no cost through piracy or reduced cost through student purchase, has meant that more people have the ability to operate in the design services market. As design software has developed it has instructed amateur users in industry procedures and covered for lack of knowledge or skill in many previously specialised technical areas. But skills displaced by computerisation or transferred to designers have not resulted in changes to designers’ training or been added to minimum educational attainments before graduation. Typesetting and proofreading are examples of this.

Now the internet and mobile digital devices are transforming the communication sector, and graphic designers continue to express high levels of concern about what technology is doing to their livelihoods. In many cases this is because a huge majority of graphic designers received print communication training and are not equipped to cope with the programming and technical requirements of digital media. While it is a reasonable bet that software will eventually remove the requirement for programming and technical know-how the transition for many graphic designers continues to be painful. And as technology removes the need for specialised knowledge exposure to competition increases.

In a troubling trend for graphic designers, low cost access to template based web design and the ready access to online photographic libraries is making much of the currently available potential work accessible to untrained, but technically savvy competitors. And for many businesses the rise of directory-replacing search engines has meant that their focus is on technology and text content issues - not design.
Fees

From the foregoing discussion it should now be apparent that concerns about fees are linked with competition and standards. The call for fixed scales of fees can not be satisfied (even if legal impediments did not exist) because the range of business sizes, skill levels, project types and regional economic differences are simply too great to be dealt with. Nor do the multiplicity of suppliers in design acknowledge a single point of authority that could deliver such standardisation.

The concerns discussed were collected during two of the DIA’s Fees and Salaries Surveys. Published reports from these surveys have proven to be the most equitable way to provide a complex industry with trends to help price their services. The Fees & Salary Practice Notes that are published allow practitioners to have the confidence to price according to trends in their discipline and region. Once again the industry is so large and fragmented that only a small proportion of practitioners are aware that the information is available or base their business practices on them.

Free Design

There have always been free and low cost design services available: new practitioners attempting to build a client base, businesses that bundle design to get an order for their primary activity, established businesses trying to maintain work volume and businesses pitching for new clients. The proliferation of micro-businesses in the design sector ensures that a greater proportion of the available business is subject to these practices. The Internet has also enabled client access to an international pool of free and low cost creative services and resources.

While designers would like their sector organisations to stamp out these practices there is no way of achieving it. Appropriate business education during tertiary training can assist in setting the business practices of long term participants in the design sector within Australia. But no action in Australia can address the ability of providers in lower cost countries to provide competing services.

The challenge for future designers is to find a client base that can’t satisfy their requirements through these low or no-cost mechanisms and demonstrate a case for realistic and sustainable fees.

Professionalism

The egalitarian nature of modern tertiary education; the legislated expansion to make education available to all regardless of social and economic background, is one of the factors that makes it less and less likely that design graduates will have experienced or have affinity with professional culture. The awareness of and need to join a professional association has greatly diminished. Much of what the design sector craves in terms of recognition, standards, conditions, and government assistance can only come through sector organisation and a greater proportion of designers joining and participating in a support organisation such as the DIA.

Each professional group bears the responsibility of maintaining its democratic voice in society. Within the three streams of design that are represented by the DIA (manufacturing, built environment, communication) less than one tenth of practitioners are in current membership of relevant organisations (DIA, AGDA). The splitting of this membership and the duplication of administrative costs further weakens the design professions and their ability to afford appropriate support services.
Proposed Actions

In conclusion - viable actions

Taking account of the realities of the national and international forces affecting the design professions there are a range of actions for designers to concentrate on, and some to avoid. Designers can not expect these efforts to all come from their professional associations, they must provide significant personal action if they expect improvement in their working environment.

Professional body actions based on key words from the surveys

- **Public Education** - Avoid general promotion of design and its benefits. The resources required to prevail over other influences in the media are not affordable and promotion mainly serves to encourage more participants in the sector.
- **Client Education** - Concentrate on providing materials and tools that practitioners can use in their direct communication with customers. These tools should facilitate better designer/client understanding and process.
- **Education** - Lobby for greater transparency in the reporting of tertiary student employment outcomes. In particular the provision of course by course outcomes rather than the aggregate outcome of faculties that encompass training for a variety of occupations.
- **Public Education** - Provide a ‘Parents Briefing’ paper for parents of secondary school students making clear the state of each discipline together with a realistic view of job and earnings prospects.
- **Public Education** - Ensure that vocational guides made available to secondary students for tertiary course selection contain current statements about the employment prospects of each discipline.
- **Competition** - Make available ‘warts and all’ information to the sector that illustrates the statistical state of the design sector.
- **Standards** - Provide information on the best practice procedures and processes to operate as a consultant designer.
- **Recognition** - Increase awareness of professional differentiators such as MDIA and Accredited Designer.
- **Competition** - Provide differentiating support mechanisms such as Accredited Designer, post nominals, industry benchmarking information, referral services, and peer networking.
- **Fees** - Provide accurate fee and remuneration information to help practitioners make appropriate financial decisions.
- **Conditions** - Provide accurate remuneration information to allow employers and employees to make appropriate employment decisions.
- **Technology** - Provide industry information on current software and technology use.
- **Education** - Provide information guides on the desired content, aims and outcomes of tertiary design courses.
- **Education** - Review design course materials used in secondary schools with particular reference to alternate career outcomes other than the design professions. Ensure that design is taught as a process skill rather than a vocational skill.
- **Government** - Lobby for support of and retention of advanced manufacturing capabilities in Australia as an incubation environment for manufacturing based innovation.
- **Government** - Communicate the symbiotic relationship between skills, industry capability and the success of future innovation.
- **Government** - Lobby for greater awareness in government projects and procurement of the value of design as an economic magnifier.
- **Recognition** - Unite the DIA and other design support organisations to ensure that the design professions have a consolidated resource and organisational base capable of providing services to the design sector.

Designers’ actions

Professional designers should increase their differentiation from other service providers by professional membership, accreditation, CPD, best practice consulting processes, and display of credentials.

- **Standards** - Be a member of and support your professional association.
- **Fees** - Avoid pricing below the average for your discipline and locality.
- **Client Education** - Provide new customers with explanation and guidance on the processes, aims and fee structures of design as a standard action.
- **Recognition** - Obtain and display industry membership credentials (post nominals, stickers, signs) and CPD credentials (Accredited Designer) in all your business dealings.
• **Standards** - Be knowledgeable about regulations, standards and legal matters relevant to your discipline.

• **Standards** - Free Pitching - Avoid providing design services without payment or through competition structures.

• **Standards** - Participate in a formal CPD process.

• **Education** - Provide your local tertiary education provider with feedback on the capabilities of their graduates.
Industry wide issues 2003

Foreword
The economic and political environment in 2003 was significantly different from the survey environment of 2011/12. The Howard Liberal government had been in place since 1996 providing a sense of stability to the commercial sector. Australia had had 12 years of economic growth. Economic disturbances such as the Asian currency crisis in 1997, the Dot.Com/ Tech Wreck stockmarket plunge of 2000-2002 and the 9/11 terrorist attack of 2001 in the US created a constant sense of unease but did not stop Australia’s run of growth.

Older business operators who traded through the 1991 recession were wary of the long, slow, growth cycle. Many younger designers who responded to the survey had never experienced a recession.

The top ten issues for the combined design professions in 2003 were:

1. Competition
2. Standards
3. Conditions
4. Client Education
5. Recognition
6. Education
7. Fees
8. Technology
9. Public Education
10. Business Skills

1 Competition everywhere

Everyone is a designer Ind, VIC

Achieving desired levels of income is at the heart of this issue. Most designers are either self employed or working in small businesses. The average business size in this survey was 3.1 designers. The pressure of finding continuous work and making sufficient from each project to sustain a business is unrelenting.

Competitiveness in the industry, cutting profit margins and increasing hours worked to meet job deadlines/clients needs. Gr, SA

Oversupply of graduates with little prospect of employment forcing them into freelance without the experience in the business, confusing clients and cost structures and quality to the overall detriment of the design industry. Gr, SA

The finger is pointed in many directions at once.

Non-professional desk-top publishers have undermined the professional credibility and respect of experienced, qualified designers. They and indeed other designers too, ferociously undercut each other, thereby cheapening the overall profession. Also a lot of competition from printers offering cheap or even free design, which has been subsidised by the print side of the business. Gr, VIC

Printers, desktop publishers, marketing agencies, architects, toolmakers, moulders; the areas of competition vary with each design discipline but in each it includes those vocations in the immediate supply chain, as well as other industry suppliers such as public relations businesses or materials suppliers. Client’s are not immune either.

...volume of work eroded by junior backyard designers and clients getting their bright young office assistant to knock up the newsletter etc. Gr, NSW

The overall message is one of designers struggling to find employment, recognition and differentiation in an environment of increasing competition.

These concerns are not just expressed by the employers in the survey. Employees also placed this issue at number one. In the small business environment of design most employed designers are not insulated from the competitive environment by their place of employment and the subject of competition is a common one at most industry gatherings.

Work - not much around so you have to take a lower pay. Too many designers in the work force - not enough work out there. Gr, NSW

Too many cowboys claiming to be designers. Gr, QLD

TV amateurs thinking that they can become decorators overnight. Dec, NSW

Too many people calling themselves interior designers when they hold no qualification at all. Int, WA

Too many untrained and unqualified people calling themselves designers. Ind, VIC
There is little evidence in the survey that designers understand the societal and economic drivers that are creating this level of competition. There is also little evidence that designers understand, as relative newcomers to many of these supply chains, that they can be considered to be encroaching on territories previously occupied by others.

2 Declining standards

The doodling geeks of today will be the graphic design tutors of tomorrow and god help the industry when that happens. Gr, QLD

This issue is closely aligned with Competition and has at its foundation a concern that the standard of service and skill offered by much of the industry is dragging down the reputation of the whole.

Too many untrained and unqualified people calling themselves designers. Ind, VIC

Dilution of designers influence by untrained personnel in design professions doing substandard work. Int, QLD

Maintaining professional standards. Dec, VIC

Designers have a strong culture of self imposed and self policed standards. This stems from a personal identification with the output they produce, that the design solutions they provide are a direct reflection of themselves.

To maintain the highest possible levels of professional service in the context of ones duty of care. Int, NSW

Maintaining and reinforcing the high standards of the design professions. Int, VIC

Adhering to professional practices so that all designers work towards greater professional recognition for the industry as a whole. Gr, VIC

Development by the professional body of industry standards and methods of practice. Ind, NSW

For some the standard relates to technology

The design industry should agree on an industry standard for the way artwork is processed, PDF or Quark and stick to it. Gr, WA

For some the standard relates to fees.

Professionalism in charge out rates, setting of standards so design isn’t undersold. Furn, QLD

New breed of client places less value on design. Gr, NSW

Ethical standards especially between designers and design practices. Int, NSW

Quality control of design work. Int, SA

Raise professionalism, standards, ethics. Ind, WA

Standard recommended fee rates. Ind, VIC

Very difficult to be financially rewarded for amount of education, library upkeep and professional and personal development that it takes to maintain professional standards that are rewarding for the designer and client. Gr, NSW

A tighter set of professional standards, bound together by a recognised body like that of medical practitioners or professional engineers. Gr, VIC

To work to a code of ethics. Gr, WA

Designers looking for anchors and stabilising influences in the storm of competition.

More professional standards/guidelines. Gr, VIC

3 Improve conditions

Long hours of work with very little salary in return. Tex, VIC.

Employment and work conditions in the design professions come in for repeated criticism. Salary levels, hours, overtime, training and career advancement are all concerns.

The relationship of Conditions to Competition is obvious and known to practitioners already in the industry. Students choosing to study design are not yet aware of the pressures.

Design is so often misrepresented during education, we’d probably have a higher professional success rate if students were made more aware of industry realities. Ind, QLD

Graduates should be aware of this industry climate and made to consider their career options. Gr, VIC

Many are aware of the interplay between the supply of designers and Conditions. The fragmentation of the design industry into micro-businesses enabled by technology and the necessity for graduates to find work has accelerated the problem.

Work - not much around so you have to take a lower pay. Senior designers are taking junior roles to get work - thus juniors get no work. Too many designers in the work force - not enough work out there. Many clients go to cheap places like (name deleted) etc. - no one has money to spend on design. Gr, NSW
The industry is continuing to fragment into thousands of businesses of small size - a far cry from a healthy industry whereby there are less businesses employing greater numbers. Gr, SA

Concerns differ depending on the viewpoint of employer or employee.

The lack of actual designer jobs. Long hours of work with very little salary in return. Not enough recognition in large working areas. Marketing/managers taking credit for designers’ hard work. Marketing/managers going on buying trips instead of designers. Tex, Vic

The really talented in-house designers in many businesses are paid small wages compared to the charge out rates of a business. Gr, NSW

Working conditions too exhausting with long hours and no reward system. Abuse of younger staff psychologically and physically. Int, NSW

Setting reasonable salaries for designers that reflect time spent to create innovative products. Sales people’s salaries are often double in fashion. Fash, QLD

The rapidly changing technology environment is a factor in the equation. Skills that used to be spread amongst a variety of trades are now the responsibility of the designer.

More and more of the processes that once happened outside of the business are now part of our job. Gr, WA

Overall I feel that the profession is undervalued and underpaid. Over my time in the industry I feel that the demands to keep up with changing technology has required constantly learning but this has not really been reflected in increases in wages. Gr, Vic

OHS issues in regards to seating at computers for long hours. Gr Vic

The rapidly changing technology environment is a factor in the equation. Skills that used to be spread amongst a variety of trades are now the responsibility of the designer.

Overtime comes in for particular comment. However the concern of employers is that they are competing in a market with a majority of self employed designers who would not have to meet stipulated minimum conditions.

Companies need to pay overtime or manage the workload so that eight hours a day is enough to complete all jobs. I hear of so many designers working really long hours for no extra pay and receiving a mediocre salary to start with. Gr, WA

Overtime is not credited in salary or time in lieu - especially +50 hour weeks are average. Gr, NSW

Stability and good working environment. For example working realistic hours and having good equipment. Dec, Vic

Unpaid overtime needs to be addressed. Gr Vic

Some try and propose remedies but they are not always realistically targeted when the macro issues affecting the sector are considered.

Better training, better wage/workplace conditions. Gr, QLD

Opportunities for young people to gain employment or information and support in starting out their own studio. Gr, Vic

4 Never enough client education

Trying to educate clients that giving your secretary a copy of Corel Draw is not the same as hiring a Graphic Designer. Gr, NSW

Designers feel strongly that clients don’t understand the process and benefits of design or have sufficient awareness that a designer is the appropriate business professional for their needs. Many hope that addressing this issue will result in significant untapped work.

From the point of view of a salaried industrial designer within a manufacturing firm I believe we still need to push the benefits of industrial design to business and manufacturers. It is an issue of visibility. I know that this is a long standing issue but it is as valid as ever. Business and government needs to realise that it will benefit the bottom line through increased sales and reduced costs. Ind, Vic

Designers feel that project outcomes and availability will improve if more of the population are exposed to design education. They would like more people to understand the skills a designer brings to a project.
and the benefits to the project outcome.

Educate marketing, communications students at university level to value design and appreciate the difference between crap and quality. Gr, NSW

Educate clients on the value of design. Gr, SA

Ensuring that clients value conceptual thinking and ideas. Further education of the market place including all government and corporate clients. Gr, VIC

Non-design educated employers need to develop a better respect for the professional opinions of those with a design education. Gr, QLD

Educate the manufacturing and marketing industry about the values of good designers. Gr, NSW

Client appreciation of value added by employing a designer. Int, SA

For some the concerns are specific. For example the timing of the engagement of a designer

As problem solvers we can contribute more to a project when involved in the conceptual development and planning stage. Gr, NSW

Education of the business community/public of checking for good standards of practice when hiring a design professional. Gr, NSW

We need to educate clients about the appropriate time to involve designers. Gr, NSW

There is still concern that design is equated with art and is dismissed or devalued by the association.

And emphasising that design is a profession not an artsy untrained field. Gr, NSW

Lack of client education is also seen as detrimental to the design process and project outcomes. Poor briefs from clients come in for particular comment.

Lack of direction from clients in their briefs. That is they expect you to know their business ins and outs and read their minds. Int, NSW

Lack of knowledge of legal and intellectual property realities in the general business community are also a concern.

Client education regarding copyright images. Demand for images for nothing. Int, NSW

Clients want to own designer’s styles. Int, NSW

Unrealistic time and performance expectations from clients magnify the time related issues in Conditions.

Client’s expectation of high quality work at minimal cost. Int, NSW

Client expectations of time management, ie deliver late, still want on time or expect everything tomorrow. Int, NSW

Educating clients on realistic time frames to complete work and ensure excellent results. Gr, NSW

5 Can’t get no recognition

It is an issue of visibility. Ind, VIC

Calls for greater recognition of design and designers go hand in hand with a perceived need for Public Education, Client Education and promotion programmes. Designers feel that their occupation and skills are not well understood or respected in the community. They would like greater acknowledgement and understanding of the role and skills of a designer, the process of design and the range of benefits it can deliver. And a willingness to allow a designer the scope to achieve these benefits.

Recognition of Graphic Design as a profession. Gr, WA

Recognition in regional areas. Int, NT

Design industry being recognised by the public. Int NSW

Recognition of value of design by community/society generally. Int, SA

Having design valued - clients being prepared to pay for good design. Being seen as a professional industry. Int, SA

Recognition by the public that design is part of everything we do. Int, WA

Some designers understand that the profession shares some responsibility for the public’s attitude.

Adhering to professional practices so that all designers work towards greater professional recognition for the industry as a whole. Gr, VIC

Become more professional - the DIA and its members do not have the same recognition the RAIA architect has in the community. Int, NSW

Designers need to loose the ‘Why can’t I get any respect’ mentality. Suck it in and ask why aren’t we deserving of respect? Let’s get to the core of the problem and fix it. Gr, SA
For some the recognition is more about the outcome and the quality of the environment that it produces.

Respect for the value of good design in the overall success of a company. Gr, WA

Recognition and promotion for original design.
Tex, VIC

Raising the profile of professionals in Australia.
Raising the profile of Australian design internationally.
Ind, NSW

I would like to see design have a much higher profile (up there with sport) It would be a value added component to our manufacturing and exports.
Gr, NSW

Recognition of the contribution of design to GDP by governments. Ind, QLD

6 Too much not enough education

Less graduates or higher quality ones. Ind, ACT

Issues relating to tertiary design education are heated and controversial. They cover course content, the number of providers, student quality, and the number of students. The two most flagged issues are course quality and oversupply of graduates.

Design employers have been vocal about the rigor and content of design courses for many years.

Quality of tertiary training is poor. Gr, QLD

Education. Education. Education!
As an employer of contract labour I am surprised by the lack of design skill I see in portfolio presentations and lack of software knowledge. Gr, NSW

Lack of skilled graduates. Ind, VIC

Quality of education at a tertiary level. Ind, QLD

New graduates are almost unemployable - their output in terms of usability and technical competency is unbillable. Gr, VIC

Design education standards, qualifications need to be greatly improved. Ind, VIC

Tougher tertiary courses - more intensity in the education and greater expectations placed on projects to achieve pass grades. Fail more, give lecturers and professors freedom to fail students. Int, ACT

Design schools not providing suitable courses to train designers suitable for industry and the professions. Ind, VIC

The second major factor: The sheer volume of students accepted into, and graduating from, design courses attracts a lot of criticism. Practitioners recognise the finite size of the Australian market and are alarmed at the unrealistic supply of participants.

Large quantities of students graduating looking for employment. Ind, VIC

Education - reduce the university intake by half or rethink project based education. Ind, NSW

Take in less design students at TAFEs and UNIs to improve balance of clients and designers. Ensure skill level of graduates coming into the workplace. Gr, SA

Compression of tertiary education. Under qualified practitioners. Int, ACT

Fewer graduates - the system is flooded with graduates each year with little opportunity for employment. Gr, ACT

Designers see the education industry as having a responsibility to the professional sector they educate and to the employment outcomes of their graduates. Designers, however, seem largely unaware of the commercial realities of the education industry.

Convincing universities that the saying was publish or perish not populate (the classroom) or perish as it does nothing for the student or graduate in the long run. Gr, SA

Reduce the intake into design courses and be more selective of students. Gr, SA

Design has been devalued in the past 3 years due to undercutting and over supply of designers via educational institutions. Education Institutions need to address their impact on graphic design industry by reducing the number of design entrants.  Gr, VIC

Drastically reduce university intakes to top students, perhaps by submission of school D & T portfolio. This will permit improved teaching ratios, make industrial experience/visits possible (classes of 50+ prohibit this now), and improve graduate employment prospects (currently about 20-25% of graduates actually find design employment). Ind, NSW

It’s not just the volume from degree level courses it’s the second and third tier suppliers in the tertiary sector that offer shorter courses at lower levels of achievement.

Not allow quick tech courses to infer that once completed students are designers or completely knowledgeable about computer design file set
ups, printing requirements etc. These courses are cheapening the whole industry. Gr, NSW

Cracking down on paid qualifications for example privately owned educational institutions who flood the market with not very good designers - I think this applies mainly to the graphics industry. Gr, NSW

Too many quick short cheap courses around. Gr, Vic

I am concerned at the proliferation of Interior Design/Decorating courses being offered via correspondence. Int, Qld

The complaints about course quality are now decades old. The profession ends up wearing the consequences of the tertiary education industry environment.

Oversupply of graduates with little prospect of employment forcing them into freelance without the experience in the business confusing clients and cost structures and quality to overall detriment of the design industry. Gr, SA

Difficult to obtain suitably skilled labour. Market saturation with low quality and low rates giving industry operators bad name. Gr, NSW

A more realistic approach from the courses as to what graduating students should expect once they reach the workforce. Their expectations are very high - they get disheartened by not reaching their goals as quickly as they expect. Oth, NSW

Some designers attempt to find solutions. In most cases these have been put into action over many years now and are either ineffective or contribute to the oversupply.

Better design education at secondary level. Int, SA

As a graduating student I think a lot more emphasis needs to be put in courses on business practices. Gr, WA

More consultation between educators and companies to ensure sustainable design positions for graduates. Gr, Vic

The education system needs to produce designers with a business focus. Gr, Vic

A better link between academia and professionals. Int, SA

Teach students business management so they are able to better manage themselves when freelancing. Gr, Vic

Tougher tertiary courses - more intensity in the education and greater expectations placed on projects to achieve pass grades. Fail more, give lecturers and professors freedom to fail students. Int, ACT

7 Fees are tight

Fee setting and estimating hours for quotes are common concerns in small business across most industry areas. Many business owners have never had training or mentoring in this area, nor have they necessarily been given access to the process in businesses they may have worked for before self employment. Many feel that there is some inside knowledge or secret that will make this process simple. So it is not surprising that designers express these concerns in conjunction with low fees, inconsistency of fees, and the need for justification of fees to clients.

For many, particularly in interior design, the perceived answer is a recommended fee scale such as used by architects.

Setting an Institute scale of fees like that published by architects would give a useful industry standard guide when negotiating fees. Int, NSW

Standard recommended fee rates. Education of design firms to get these rates. Ind, Vic

Better cohesion between design professionals. Perhaps agreements in principal for fee structures (very difficult). Int, SA

DIA to set a standard for fees so that undercutting is not a common occurrence. Int, NSW

This glosses over the issue of differing levels of expertise and the complexities of separating the costs and scopes of work of interior portions of multifaceted projects from the architectural and construction components. The vastly different project types in other disciplines make codifying fees impossible to apply universally even if issues relating to collusion and cartels can be avoided. The DIA’s Fees & Salary Survey reports provide guidance in fees by showing the actual fees being charged by each discipline in each geographic region.

Designers using low fees to undercut competition or through lack of business experience are major concerns.

Too many small freelance people doing what they can and cutting their prices. Gr, NSW
Draftspeople undercutting professional fees. Int, VIC

Competition and fee cutting. Int, SA

Non-professional desk-top publishers have undermined the professional credibility and respect of experienced, qualified designers. They and indeed other designers too, ferociously undercut each other, thereby cheapening the overall profession. Also a lot of competition from printers offering cheap or even free design, which has been subsidised by the print side of the business. Gr, VIC

Consistent offer from our profession on fees without the current 50% variation from one office to another. Design and construct organisations cutting fees in order to win construct contracts which undervalues the design service. Int, WA

Most important - fees - There seems to be a trend that the top end of town are charging abnormally low fees, therefore lowering fees across the board. A situation where you can't compete with price and the client learns to look at the fees not the design. Gr, SA

The unregulated nature of design consulting, the vast range of skill and experience levels this implies, the multiplicity of business types sharing the market, the subjectivity of the product, and the lack of ability of most customers to assess potential design suppliers all lead to unrelenting price competition.

How are we to keep up with the cheap rates of these people calling themselves designers? Gr, VIC

The market need to appreciate the value of using experienced designers and paying the appropriate fees. Firms (individuals) need to stop cutting fees to buy work - it's hard enough as it is. Int, WA

I work directly with small business owners many of whom have no idea of what good design costs. When I liken my charges to that of a plumber they then understand - but initially they expect a logo for $60. Gr, NSW

This further reinforces the profession’s concern with vastly differing levels of education leading to the same occupation.

Competing with 6 week course designers who think they can design newsletters, annual reports etc. but can’t. Competing on price is impossible. Gr, VIC

We try all the time to make people aware that a diploma or degree in graphic design cannot be compared to TAFE 6 week courses and students who undercharge for work during college are jeopardising their own job potential with ridiculous cheap prices whilst studying. Gr, VIC

8 Stop the technology

Technology based ‘white ants’. Gr, NSW

Designers have a range of concerns about the effect of new technology on business practice and profitability. Issues of remaining current with technology and access to information about appropriate technology selection and use. Concerns about competition resulting from cheap or free access to software. And issues with computerisation shifting the onus of skills and responsibilities in the workplace.

Technology changes, especially print processes and web design delivery. Gr, ACT

Keeping up with software/hardware. Gr, SA

Technology advances - the changing of the way that we work due to new technologies such as digital photography. We now need to take on work (ie colour correction) that was done by a scanner operator. More and more of the processes that once happened outside of the business are now part of our job. We need to be kept up to date or more importantly keep ourselves up to date. Gr, WA

Graphic/Web - Determining which of the tools (software) is going to be important and relevant. Gr, NSW

There seems to be less and less finished artists who are prepared to focus on finished art, designers are required to manage more production and pre-press related work. Gr, VIC

Unfortunately technology is a major impact that detracts from the design process. We feel that we now spend more time trying to keep up with the technology and just making things work (ie software systems and applications) than spending time on the actual design process. Gr, NSW

Designers are frustrated by their lack of control over the externally forced necessity to upgrade software and technology.

Keeping up with new technology and software in small business, weighing up costs of new software and hardware against carrying on with known products that give required results. I don’t want to upgrade to a lesser product just for the sake of upgrading, but I can’t afford to stay too far behind either. Gr, QLD
The new technology allows customers to take outsourced processes in-house. This transfer of work away from consulting has been particularly noticeable in graphic and industrial design.

*New technologies allow businesses to set up easily with in-house designers thus just paying them a salary. My business has recently (last 2 years) lost a lot of work through this new trend.* Gr, VIC

The computerisation of the graphic design industry has enabled us to be much more creative but it has also undermined our role a lot. Clients think they could do it themselves or think our job is easy because the software is readily available. Gr, NSW

*Dealing with clients who have their own equipment and consider themselves designers.* Gr, VIC

It also means that the tools of production are available to portions of the sector at lower or no cost creating imbalances in the cost structures from supplier to supplier.

*Competition from amateurs who buy cheap software and play the role of designer (not qualified).* Gr, VIC

Unskilled, untrained people trying to pass themselves off. It is easy to do with computer technology. Even poorly conceived designs can fool most people if produced on or with a good computer package. Ind, NSW

Technology conflicts can occur between business entities with differing needs or preferences.

*MAC computer issues with OS10.3, PDFs for printers, printers using windows. It's like the industry is between standards, gone are the days of Quark files only.* Gr, WA

*Conflict between MAC and PC platforms.* Gr, VIC

Technology. Compatibility of technology. Gr, VIC

### 9 Public education boost

Raise the awareness of good design as a valuable business tool. Gr, NSW

Many designers call for greater understanding from the public of the role of design and the appropriate situations to seek a designer’s services. While this comes from designers in all disciplines it has most relevance in disciplines where the general public are potential customers; disciplines such as residential interior design and interior decoration.

In disciplines where clients are typically commercial entities concerns about Client Education are more relevant. There is also a desire from some designers to raise the standard of community taste for products and environments of a higher design standard. This harks back to design manifestos of the early part of the 20th century.

*More education, exhibits to the public to let them be aware of what designers offer them.* Oth, NSW

Same as always - education of the general public about the importance, relevance of design - which would then create a society of consumers leading the market towards good design as standard manufacturers would then have to use designers to compete effectively - rather than current rip-off culture. Furn, SA

Educating the general public about the design industry. Benefits and long term cost savings of using designers vs trade based consultants only. All design industries suffer from consumer ignorance in this area. Oth, QLD

There is a general impression amongst much of the population that designers are a nonessential extra that can be done without when economic times are tough. Gr, TAS

*I think that the general public is intimidated by these professions and associate the service with great expense, large project, a social image/perception and not a necessary service.* Int, VIC

Educating the public that designers design and computer technicians, receptionists, the guy in the customer service department, etc. do not design. Gr, QLD

General public and clients have an outdated view of what designers do. We are primarily problem solvers but seem to have lost that status and are being treated as just decorators who make an end job look good. Gr, NSW

*Build consumer confidence to use a design consultant. Overcome the perception that it is an elite profession - good design solves problems, saves money and stress.* Int, VIC

*Education to showcase design that reaches the general public and particularly schools.* Int, VIC

Public understanding of what interior designers do. As a result of all those lifestyle programmes on the television, many people think they can do our job. Int, SA
Recognition by the public that design is part of everything we do. Awareness of the difference between good and bad design. Int, WA

Educate the public on just what it is we offer and how time effective it is for them to use our services. Lift our profile to show that we provide a worthwhile and beneficial service. Int, NSW

For some it is not about design in general but about specific demarcation in their industry sector.

An education of the public as to what a designer is as opposed to a decorator. Int, QLD

Combating the negative impression of designers given by reality/renovation TV. Int, NSW

The belief that the public need this understanding can reach unrealistic levels that ignore individuals rights to choose what they want to learn.

Forums for the general public to observe and learn of the machinations of graphic design. Gr, VIC

And for some it’s a crusade to promote Australian capability in general and combat the perception that all good things come from somewhere else.

Get public to believe in Australian design. Int, SA

10 Essential business skills

Education of graduates regarding business, understanding client’s needs and business problems. Gr, VIC

Design education needs to acknowledge the small business self employed needs of many designers with appropriate business education. Concerns relating to designers’ preparation for business activity, and concerns relating to business skills rather than design skills are constantly raised. But the issue also extends to designers’ preparation for advising their commercial clients.

Management, administration, billing, variations. Gr, NSW


Productivity, time management, budgets. Gr, NSW

Have students study business management as part of their design education. Ind, NSW

Better business practice education of young designers. Gr, SA

As a graduating student I think a lot more emphasis needs to be put in courses on business practices. Because of what I learnt at Uni on running a business I feel it makes me a better designer because I can understand where my employer is coming from and where my client’s mind is at. Gr, WA

We need to ensure graduates and junior designers are managed correctly ie designers need management skills. Gr, VIC


Designers and design businesses need to have a greater grasp of what real business (esp. SMEs) need; rather than foisting over-designed ego art on to them. Design has to serve the client, ie if it doesn’t sell product it is a failure. Gr, VIC

Designers have a need to understand the business focus of their clients in all scales of business and receive training relevant to this.

The education system needs to produce designers with a business focus. Professional designers need to understand where design fits into a corporate plan and understand the value design brings to a business. Industry bodies need to stop awarding design awards to projects or individuals based on aesthetics and begin to look at design effectiveness based on commercial success for its clients. Designers need to reposition themselves as business strategists. Designers need strategy skills. Gr, VIC

With so many graduates becoming self employed as the only option to be able to work in their discipline of choice the business world can be a daunting place without adequate training.

Liability, accountability, quality control, risk management. Ind, QLD
## Issues analysis 2003

### By Discipline

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© David Robertson & the Design Institute of Australia
August 7, 2007 marked the beginning of the Global Financial Crisis exposing weakness in many national economies. The GFC is considered to be the worst global financial crisis since the Great Depression of the 1930s. Australia was well positioned to weather this crisis with the savings of sixteen years of growth and a well regulated banking system. Under the Rudd Labor Government (December 2007 to June 2010) initially $10 billion was used to stimulate the economy and then a subsequent $42 billion. Progressive disaffection with the Rudd government led to a leadership challenge with Julia Gillard becoming the Prime Minister. Business confidence in the Labor government continued to decline under Gillard.

Continuous news of economic stress in Europe and the US and consequent constraints on China’s economy, the strong Australian dollar affecting Australian export sales and lack of confidence in government all continued to sap consumer and business confidence through 2011 and worsening through 2012 and 2013.

The top ten issues for the combined design professions in December 2011 were:

1. Fees
2. Competition
3. Economy
4. Standards
5. Client Education
6. Education
7. Jobs
8. Outsource OS (NEW)
9. Recognition
10. Technology

What’s changed since 2003?

Many of the concerns raised repeat those made in 2003 and represent endemic design sector and small business concerns. The severity of the economic climate has reordered many designers’ priorities however as they strive to find income in a constrained market. Fees, seventh on the list in 2003, has taken the lead as designers’ number one preoccupation while Competition is bumped to a close second.

1. Fees and income

While the average hourly fee charged by designers increased between 2003 and 2011 from $95 plus GST to $117 plus GST the income of self-employed designers progressively declined. Graphic designers and interior designers were worst affected. Their average income levels were around 145% of AWOTE in 2003 and fell to around 115% and 130% respectively in 2011.

Falling profitability of design services has made Fees the focus of a lot of concerns. Designers’ efforts to understand and find solutions to these concerns informs almost all other issues. Constant media comment about the international and national economy has made it clear that these problems are not specific to their locality or industry sector but they still search for factors in their immediate business environment as solutions.

2. Competition

This has produced a strong focus on forms of competition in the market: fee undercutting, free pitching, buying work, unqualified participants operating at lower fee levels, on-line competition, technology enabled competition, and graduate volumes.

Compared to 2003 it is now apparent that discipline groups other than industrial designers are increasingly exposed to international pressures through the Internet.

3. Economy

The extended flow on effects from the GFC, temporarily masked for some by the success of the mining and resources sector, have pushed the key word Economy from 27th in 2003 to 3rd. With Australia’s dollar trading at almost parity with the $US trade exposed disciplines such as industrial design have come under extra pressure.

4. Standards

Lack of consistent standards of practice brought about by widely differing training levels, self-training, and the supply of services from different occupation groups continues to be a problem. Graphic design and interior design are particularly affected.

In interior design it can be a demarcation issue between architects and interior designers, and interior designers and interior decorators, but it is also an issue that extends to levels of training and untrained competition attracted to the industry by DIY programmes and media.
For graphic design the many sources of supply of graphic services which include offset printers, digital printers, signage companies, marketing companies, web programmers and advertising agencies all with differing business focuses and skill sets mean that standards vary. Graphic design has a high exposure to the variable level of education offered in the tertiary education sector and to the technology-enabled self-trained.

5 Client Education

Client Education continues to be a focus for designers looking for ways of improving both work availability and profitability. The difficulty for the profession is the lack of resources to provide a broad education campaign to the client sectors of the various disciplines. This is compounded by the volume and reach of mass media influences such as DIY decoration and renovation programmes on TV. The resources required to displace the effects (even temporarily) of these popular television programmes, magazines and newspaper articles is out of the reach of the design sector.

The viable approach is to provide practitioners with the resources and materials to perform this education task at the time of client contact. That is, professional practitioners need to take direct responsibility for this task and make it a point of differentiation in the market.

6 Education

All design disciplines are aware of the imbalance between available work and the number of graduates produced by the tertiary education sector. Proportionally all disciplines have around a 2 for 1 ratio of graduates to jobs and worse if the aspects of part-time employment and self-employment are factored in.

The quality and consistency of tertiary design education comes in for considerable comment with designers offering ways of improving graduate skills on one hand while criticising the numbers being graduated on the other.

7 Jobs

Concerns about jobs rose into the top ten from 25th in 2003. It was the number 4 concern for Industrial designers but due to the number of interior respondents to the survey interior design was the discipline that pushed up its rank.

Many of the respondent to the survey are providing consulting services so references to jobs is often about availability of projects. Finding work and keeping staff employed becomes a major obsession in recessionary times.

8 What’s new?

Outsource OS (over-seas), Internet Competition and DIY are new key words in the 2011 survey. They all flag rising concern about growing competitive factors in the design marketplace.

Outsource OS has different faces for the three principal disciplines. For interior designers it is the sourcing of furniture and fittings from overseas and the sourcing of replica copies of furniture. For industrial designers it is the sourcing of design services in conjunction with outsourced manufacture. For graphic designers it is direct competition via the internet with designers in low wage countries.

DIY still features in graphic design in the context of potential customers using design software to bypass professional services. But it is a major complaint in residential interior design fuelled by television renovation programmes.

Internet Competition shows up in mechanisms such as crowd-sourcing, competitions to bypass professional services, free-pitch style compete-for-selection and payment sites, clients using search engines to by-pass professional specification, sourcing and supply, low cost photography, illustration and video libraries. In some cases these mechanisms both aid the designer and compete with them.

9 Recognition

Recognition continues to be a focal concern for designers and is still seen as a potential solution to improve industry conditions and income. Coming in at number 9 in 2011/12, compared to 5th in 2003, is a reflection of the consuming focus of pressures on work and fees due to economic conditions rather than a flagging belief in this need.
Client Education continues to be designers’ favoured approach to deal with this issue. (For a critique of the factors driving Recognition see the material in the Executive Summary.)

10 Technology

Technology as a concern was also displaced by the compelling focus on Economy and Competition but is clearly still a major factor driving many aspects of the design environment. On one hand it has provided significant productivity aids to professional designers while on the other it has opened the door to massive competition.

Graphic designers continue to bear a disproportionate load from the provision of design tools to the masses. Their new challenge is the shift of communication design into the digital realm making much of their print based training irrelevant.

Further reading - Designers’ Comments

For further information from the 2011 survey see the six Designers’ Comments papers prepared by Margaret Hearn available from the National Office of the DIA and the Fees & Salary Survey 2011 (Practice Note 014 Issue H).
## Issues analysis 2011/12

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Grey = New Key Word 2011
Key word definitions

These key words have been used to organise the responses made to the survey. The list was generated from words and concepts repeated in the responses rather than being a predefined list. The definitions indicate the range of comments characterised by each word.

Accreditation
Calls for formal barriers to limit the numbers of design practitioners and control their standard of practice. Calls for formal recognition of qualified practitioners.
Related topics: Standards, Accessibility

Accessibility
Concerns about the ease with which untrained or partially trained competitors enter the industry.
Related topics: Competition, Accreditation

Advertising
Calls for dissemination of design related information, specifically through paid advertising.
Related topics: Promotion

Amalgamation
Calls for greater unity amongst designers and design organisations.
Related topics: DIA

Awards
Design awards as a recognition of designers ability and as a promotional tool.
Related topics: Member Benefits

Benchmarking
Reference points for standards of professional practice, service delivery, fees and service definitions.
Related topics: Standards

Business skills
Issues relating to designers’ preparation for business activity, concerns relating to business skills rather than design skills.
Related topics: Education, CPD

Client education
Issues relating to clients' understanding of the process and benefits of design and the awareness that a designer is the appropriate business professional for their needs.
Related topics: Recognition, Public Education

Competition
Concerns about the number of practitioners, the lack of training and the spread of pricing in the industry.
Related topics: Fees, Accessibility

Conditions
Employment and work conditions in the industry. For example salary levels, hours, overtime, training and career advancement.
Related topics: Salary, Jobs

CPD
Continuing Professional Development, post graduate education mechanisms.
Related topics: Accreditation, Standards

DIA
Issues relating to the services, programs and efforts of the Design institute of Australia.
Related topics: Member Benefits

DIY NEW ISSUE 2011
Reality TV renovation shows and technology encouraging customers to design for themselves.
Related topics: Competition, Technology

Economy
Reference to economic conditions and their interaction with design issues.
Related topics: Government

Education
Matters relating to the tertiary design education process including course content, student quality and the number of students.
Related topics: Competition
Environment
Practice concerns to do with environmental sustainability, green products and ethical specification.
Related topics: Ethics

Ethics
A designer’s behaviour in relation to other designers, clients and the community.
Related topics: Standards

Fees
Low fees, inconsistency of fees in the industry and the need for justification of fees to clients.
Related topics: Standards, Competition

Free pitching
The provision of design work and in particular concepts for free when trying to win projects.
Related topics: Competition

Government
Matters of direct concern to government or calls for government intervention and action.
Related topics: Lobbying

Image
Concerns about the community perception of design and designers.
Related topics: Status, Recognition

Information
Concerns about the availability of information to facilitate design practice.
Related topics: DIA, Research

Insurance
Matters relating to risk protection for professional practice.
Related topics: Legal issues

Intellectual property
Issues relating to copyright, patents and designs, often in relation to poor client understanding of the area. Concerns with the protection of a designer’s rights in relation to payment for design work.
Related topics: Legal issues, Competition

Internet competition
Remote competition enabled by the Internet including crowd sourcing and the public’s ability to source services, products and supplies previously only available through trade connections.
Related topics: Competition, Fees, Free Pitching, Technology

Jobs
The availability of employment opportunities and career advancement for designers.
Related topics: Salary, Accessibility

Legal issues
Practice and business issues relating to law.
Related topics: Insurance, Regulations

Lobbying
Specific calls for delivery of information to government or industry organisations.
Related topics: Government, Conditions, Accreditation, Protection

Member benefits
Proposals or concerns that relate to services and programs that the DIA could introduce.
Related topics: DIA

Mentoring
Student and graduate training relating to pairing with an experienced practitioner to transmit industry knowledge.
Related topics: Education, Work Experience
Key word definitions continued

Networking
Exchanging information and awareness through people to people mechanisms.
Related topics: DIA, Mentoring

Outsource OS NEW ISSUE 2011
The outsourcing and commissioning of work from overseas sources. The direct ordering of products and supplies from overseas sources.
Related topics: Competition, Internet Competition

Protection NEW ISSUE 2011
The call for restrictions on the ability to supply design services.
Related topics: Accreditation, Accessibility, Competition, Standards

Public education
A broader call for greater understanding from the public of the role of design and the appropriate situations to seek a designer’s services.
Related topics: Promotion, Client Education

Pro bono
Designers working on community, environmental and social issues in a volunteer capacity.
Related topics: Ethics, Environment

Promotion
Calls for increased promotion of design without particular reference to target sector or methods.
Related topics: Advertising, Public Education

R&D
Issues relating to designs involvement in research and development.
Related topics: Education

Recognition
An understanding of the role and skills of a designer, the process of design and the range of benefits it can deliver. And a willingness to allow a designer the scope to achieve these benefits.
Related topics: Client Education, Public Education

Regulations NEW ISSUE 2011
Regulations that add cost, time and complexity to projects.
Related topics: Government, Legal Issues

Research
Calls for more research into aspects of the design industry.
Related topics: DIA

Salary
Salary rates in the industry and low graduate salaries.
Related topics: Conditions

Standards
Concerns about the quality and consistency of services and skills supplied by the broad spread of designers.
Related topics: Competition

Staff NEW ISSUE 2011
Availability, suitability and preparation for work of staff.
Related topics: Education, Technology

Status
Concerns about the relative position and reputation of designers in the business community and in society.
Related topics: Recognition

Sustainability NEW ISSUE 2011
Practice concerns to do with materials sustainability, energy use and ethical specification.
Related topics: Ethics

Technology
Concerns about the effect of new technology on business practice and profitability. Concerns about the issues in remaining current with technology and access to information about appropriate technology selection and use.
Related topics: Education, CPD
Unification

Calls for more consolidation of groups representing design.

Related topics: Amalgamation

Work experience

Aspects of 'in industry' training for tertiary students and graduates.

Related topics: Mentoring
Macro issues

There is a close relationship between many of the issues and concepts referred to by the key words. By grouping keywords under umbrella titles that characterise a broad area of industry concern the macro industry issues become clearer. These macro concerns bear a close correlation with the top ten key word issues identified in the survey.

List of macro issues:
- Competition
- Professional Standards
- Working Conditions
- Client Education
- Recognition
- Education
- Remuneration
- Technology
- Business Skills
- Sector Organisation

The following is a list of the key words associated with each macro issue:

**Competition**
- Accessibility
- Accreditation
- Competition
- DIY
- Economy
- Ethics
- Fees
- Free Pitching
- Internet Competition
- Outsource OS
- Protection

**Professional Standards**
- Accessibility
- Accreditation
- Benchmarking
- CPD
- Environment
- Ethics
- Fees
- Free Pitching
- Government
- Information
- R&D
- Standards
- Sustainability

**Working Conditions**
- Conditions
- Government
- Insurance
- Jobs
- Legal Issues
- Protection
- Regulations
- Salary
- Technology

**Client Education**
- Client Education
- DIY
- Free Pitching
- Intellectual Property
- Promotion
- Public Education
- Recognition

**Recognition**
- Awards
- Client Education
- Image
- Promotion
- Public Education
- Recognition
- Status

**Education**
- Accessibility
- Accreditation
- Competition
- Education
- Mentoring
- Staff
- Standards
- Work Experience

**Remuneration**
- Business Skills
- Competition
- Economy
- Education
- Ethics
- Fees
- Free Pitching
- Information
- Salary
Technology
Accessibility
Competition
CPD
DIY
Education
Information
Internet Competition
Outsource OS
Technology

Business Skills
Benchmarking
Business Skills
Competition
Economy
Fees
Free Pitching
Information
Insurance
Intellectual property
Legal Issues
Networking
Regulations
Staff

Sector Organisation
Advertising
Amalgamation
Awards
Benchmarking
CPD
DIA
Ethics
Government
Information
Lobbying
Member Benefits
Mentoring
Networking
Pro Bono
Promotion
Protection
R&D
Research
Unification
Work Experience
Table 1 - Summary of responses
Fees & Salary Surveys 2003 & 2011 - Design Institute of Australia

<table>
<thead>
<tr>
<th>Viewpoint</th>
<th>2003</th>
<th>%</th>
<th>2011/12</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Salaried Designer</td>
<td>96</td>
<td>18.7</td>
<td>101</td>
<td>22.6</td>
</tr>
<tr>
<td>2 Self Employed Designer</td>
<td>249</td>
<td>48.4</td>
<td>190</td>
<td>42.5</td>
</tr>
<tr>
<td>3 Employer of Designers</td>
<td>168</td>
<td>32.7</td>
<td>120</td>
<td>26.8</td>
</tr>
<tr>
<td>4 Freelance/Contract Designer</td>
<td>-</td>
<td>-</td>
<td>27</td>
<td>6.1</td>
</tr>
<tr>
<td>5 Other</td>
<td>1</td>
<td>0.2</td>
<td>9</td>
<td>2.0</td>
</tr>
<tr>
<td>Total Responses</td>
<td>514</td>
<td>100.0</td>
<td>447</td>
<td>100.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workplace</th>
<th>2003</th>
<th>%</th>
<th>2011/12</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Manufacturer’s product development department</td>
<td>21</td>
<td>4.1</td>
<td>15</td>
<td>3.4</td>
</tr>
<tr>
<td>2 Design department in a non-consultancy business/industry</td>
<td>21</td>
<td>4.1</td>
<td>26</td>
<td>5.8</td>
</tr>
<tr>
<td>3 Home Office</td>
<td>-</td>
<td>-</td>
<td>141</td>
<td>31.6</td>
</tr>
<tr>
<td>4 Small design consultancy, 1-10 designers</td>
<td>395</td>
<td>76.8</td>
<td>204</td>
<td>45.6</td>
</tr>
<tr>
<td>5 Medium design consultancy, 11-20 designers</td>
<td>21</td>
<td>4.1</td>
<td>26</td>
<td>5.8</td>
</tr>
<tr>
<td>6 Large design consultancy, 21+ designers</td>
<td>14</td>
<td>2.7</td>
<td>14</td>
<td>3.1</td>
</tr>
<tr>
<td>7 Secondary Education</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8 Tertiary Education</td>
<td>12</td>
<td>2.3</td>
<td>9</td>
<td>2.0</td>
</tr>
<tr>
<td>9 Other</td>
<td>30</td>
<td>5.8</td>
<td>12</td>
<td>2.7</td>
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<tr>
<td>Total Responses</td>
<td>514</td>
<td>100.0</td>
<td>447</td>
<td>100.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>2003</th>
<th>%</th>
<th>2011/12</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Queensland</td>
<td>67</td>
<td>13.0</td>
<td>78</td>
<td>17.4</td>
</tr>
<tr>
<td>2 New South Wales</td>
<td>166</td>
<td>32.3</td>
<td>141</td>
<td>31.5</td>
</tr>
<tr>
<td>3 Australian Capital Territory</td>
<td>11</td>
<td>2.1</td>
<td>11</td>
<td>2.5</td>
</tr>
<tr>
<td>4 Victoria</td>
<td>170</td>
<td>33.1</td>
<td>119</td>
<td>26.6</td>
</tr>
<tr>
<td>5 South Australia</td>
<td>53</td>
<td>10.3</td>
<td>42</td>
<td>9.4</td>
</tr>
<tr>
<td>6 Western Australia</td>
<td>52</td>
<td>10.1</td>
<td>58</td>
<td>13.0</td>
</tr>
<tr>
<td>7 Northern Territory</td>
<td>1</td>
<td>0.2</td>
<td>3</td>
<td>0.7</td>
</tr>
<tr>
<td>8 Tasmania</td>
<td>4</td>
<td>0.8</td>
<td>6</td>
<td>1.3</td>
</tr>
<tr>
<td>9 Other</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>City Responses</td>
<td>442</td>
<td>85.1</td>
<td>349</td>
<td>78.1</td>
</tr>
<tr>
<td>Regional Responses</td>
<td>30</td>
<td>5.8</td>
<td>31</td>
<td>6.9</td>
</tr>
<tr>
<td>Country Responses</td>
<td>42</td>
<td>8.2</td>
<td>59</td>
<td>13.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discipline</th>
<th>2003</th>
<th>%</th>
<th>2011/12</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Industrial Design</td>
<td>58</td>
<td>11.3</td>
<td>55</td>
<td>12.3</td>
</tr>
<tr>
<td>2 Furniture Design</td>
<td>20</td>
<td>3.9</td>
<td>21</td>
<td>4.7</td>
</tr>
<tr>
<td>3 Interior Design</td>
<td>201</td>
<td>39.1</td>
<td>189</td>
<td>42.3</td>
</tr>
<tr>
<td>4 Interior Decoration</td>
<td>43</td>
<td>8.4</td>
<td>47</td>
<td>10.5</td>
</tr>
<tr>
<td>5 Exhibition/Display</td>
<td>31</td>
<td>6.0</td>
<td>19</td>
<td>4.3</td>
</tr>
<tr>
<td>6 Graphic Design</td>
<td>237</td>
<td>46.1</td>
<td>154</td>
<td>34.5</td>
</tr>
<tr>
<td>7 Web/Multimedia/Digital (2003)</td>
<td>63</td>
<td>12.3</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>8 Web Design (2011)</td>
<td>-</td>
<td>-</td>
<td>63</td>
<td>14.1</td>
</tr>
<tr>
<td>9 Multimedia/Digital Design (2011)</td>
<td>-</td>
<td>-</td>
<td>18</td>
<td>4.0</td>
</tr>
<tr>
<td>10 Textile Design</td>
<td>10</td>
<td>1.9</td>
<td>14</td>
<td>3.1</td>
</tr>
<tr>
<td>11 Jewellery Design</td>
<td>-</td>
<td>-</td>
<td>3</td>
<td>0.7</td>
</tr>
<tr>
<td>12 Architecture</td>
<td>-</td>
<td>-</td>
<td>42</td>
<td>9.4</td>
</tr>
<tr>
<td>13 Fashion</td>
<td>7</td>
<td>1.6</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>14 Design Management</td>
<td>18</td>
<td>3.5</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>15 Design Education</td>
<td>14</td>
<td>2.7</td>
<td>13</td>
<td>2.9</td>
</tr>
<tr>
<td>16 Other</td>
<td>37</td>
<td>7.2</td>
<td>15</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Notes - 2003 figures.
Each response is assigned to only one category under Viewpoint and Workplace. Responses indicating more than one Location and Discipline have been scored against each Location and Discipline. Responses indicating more than one Location and Discipline have been included in all relevant spreadsheet areas.
1 Prior to 2003 responses from NT, Tasmania and some regional areas were included as ‘Other’.
2 Regional includes population centres outside the major capital cities with populations greater than 100,000. This includes Newcastle, Wollongong, Gold Coast-Tweed Head, Sunshine Coast, Townsville, Cairns, Geelong and Launceston.
For additional information on the information in this table refer to the relevant Fees & Salary Practice Note.
State Surveys 2011/12 State Surveys 2011/12
Queensland 15.1% Queensland 17.3%
NSW 36.5% NSW 31.6%
ACT 2.4% ACT 1.9%
Victoria 28.1% Victorian 27.0%
South Australia 7.2% South Australia 9.2%
Western Australia 8.6% Western Australia 10.3%
Northern Territory 0.6% Northern Territory 0.6%
Tasmania 1.5% Tasmania 2.1%
Total Surveys 8112 Total Surveys 15,869

Table 2 - Summary of 2003 & 2011/12 survey distribution

The database address lists corresponded to the design areas listed under discipline. DIA members have been collated against their respective discipline and state sub-totals. No specific Exhibition Design database was used. Exhibition designer responses have come from Interior, Graphic and Industrial design. This illustrates the cross disciplinary nature of this design activity.

Table 3 - Size of design businesses by discipline (2003)

Discipline Responses Average 1 person 2-3 persons 4-10 persons 11-20 persons 21+ persons
Industrial Design 54 4.5 25.9% 25.9% 37.0% 9.3% 1.9%
Furniture Design 20 2.3 50.0% 35.0% 10.0% 5.0% 0.0%
Interior Design 190 5.4 41.6% 25.3% 21.6% 5.3% 6.3%
Interior Decoration 40 1.8 62.5% 30.0% 5.0% 2.5% 0.0%
Exhibition/Display 30 3.4 33.3% 33.3% 26.7% 6.7% 0.0%
Graphic Design 220 2.9 36.4% 35.0% 26.8% 1.4% 0.5%
Digital/Web Design 58 3.2 29.3% 36.2% 32.8% 1.7% 0.0%
Textile Design 9 3.2 22.2% 55.6% 11.1% 11.1% 0.0%
All 420 3.10 44.3% 30.2% 25.0% 4.3% 2.9%

This table indicates the average number of designers per business by design discipline and the relative distribution of business sizes. The average design business in Australia consists of 3 people. 74.5% of design businesses are 3 people or less.

Industrial and Interior design businesses operate above this average. Note that some businesses in the survey are entered under more than one discipline. 420 of the 514 responses provided information about business size.
### Table 4 - Size of design businesses by discipline (2006/2011)

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Responses</th>
<th>Average</th>
<th>All Staff</th>
<th>Median</th>
<th>1 designer</th>
<th>2-3 designers</th>
<th>4-10</th>
<th>11-20</th>
<th>21+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial Design</td>
<td>28</td>
<td>33</td>
<td>5.4</td>
<td>4.2</td>
<td>6.1</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Furniture Design</td>
<td>11</td>
<td>12</td>
<td>2.8</td>
<td>2.8</td>
<td>3.2</td>
<td>2</td>
<td>2</td>
<td>1.5</td>
<td>2</td>
</tr>
<tr>
<td>Interior Design</td>
<td>139</td>
<td>164</td>
<td>8.0</td>
<td>5.0</td>
<td>10.1</td>
<td>2</td>
<td>3.5</td>
<td>2</td>
<td>83.1%</td>
</tr>
<tr>
<td>Interior Decoration</td>
<td>24</td>
<td>40</td>
<td>2.3</td>
<td>3.9</td>
<td>2.5</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>12.5%</td>
</tr>
<tr>
<td>Exhibition/Display</td>
<td>14</td>
<td>17</td>
<td>4.4</td>
<td>2.8</td>
<td>3.5</td>
<td>4.5</td>
<td>2</td>
<td>3</td>
<td>14.3%</td>
</tr>
<tr>
<td>Graphic Design</td>
<td>129</td>
<td>134</td>
<td>3.6</td>
<td>3.0</td>
<td>4.5</td>
<td>3</td>
<td>3</td>
<td>27.5%</td>
<td>41.0%</td>
</tr>
<tr>
<td>Web Design</td>
<td>43</td>
<td>57</td>
<td>3.3</td>
<td>3.2</td>
<td>4.4</td>
<td>3</td>
<td>3</td>
<td>38.6%</td>
<td>40.4%</td>
</tr>
<tr>
<td>Digital &amp; Multimedia</td>
<td>15</td>
<td>15</td>
<td>4.8</td>
<td>4.8</td>
<td>4.8</td>
<td>4</td>
<td>4</td>
<td>6.7%</td>
<td>26.7%</td>
</tr>
<tr>
<td>Textile Design</td>
<td>17</td>
<td>7</td>
<td>2.2</td>
<td>3.4</td>
<td>7.8</td>
<td>1</td>
<td>1</td>
<td>82.4%</td>
<td>71.4%</td>
</tr>
<tr>
<td>All Disciplines</td>
<td>316</td>
<td>344</td>
<td>5.6</td>
<td>4.0</td>
<td>7.4</td>
<td>2</td>
<td>3</td>
<td>33.2%</td>
<td>46.5%</td>
</tr>
</tbody>
</table>

This table indicates the average number of designers (including owners but not support staff) per design consultancy business by design discipline and the relative distribution of business sizes. The average design business in Australia responding to the DIA’s survey in 2004 consisted of 4.1 designers and owners, in 2005 4.0 designers and owners, in 2006 5.6 and in 2011 4.0. Around 68% of design businesses have 3 designers and owners or less. Note that many businesses in the survey provide services in more than one discipline. They are included in the data of each nominated discipline but are included only once in the ‘All Disciplines’ total.

* An ‘All Staff’ comparison has been included to compare actual business size when support staff and non-design staff are added. The median business size even when all staff are included is 2 people (was 3 in 2006).

The average size of an Interior Design business has been distorted by the responses of large and multi-office architectural firms with interior design departments. These responses did not necessarily distinguish between staff who were Architects and those who were Interior Designers. In addition more than one person in these firms has sometimes replied. If the returns from businesses nominating more than 21 designers are not included then the average size of an Interior Design business is 4.6 designers and owners (2011) and the average size of all design businesses is 3.3 designers and owners. The relative proportion of 21+ businesses may also be distorted by multiple replies to the survey from these consultancies.

### Size of design businesses by discipline (2006/2011)

This graph partially illustrates Table 4 and shows the increase in the proportion of micro businesses of single and two to three designers, and the decrease in larger design businesses over the last 5 years. While some of this effect relates to tough economic times other factors including graduate numbers relative to market size, and the enabling factors of computer and communication technology play a part.
**About the author**

David Robertson is a former National President (2000 to 2008) and a Life Fellow of the Design Institute of Australia. His focus as President was the improvement of the strategic focus of the professional body through information collection and dissemination, and the improvement of the business and marketing mechanisms of the organisation.

His tertiary training is in industrial design and he owns a consultancy in South Australia that provides design services and strategic advice in industrial, graphic, digital and web design. He is recognised by the professional body as both an industrial designer and graphic designer.

He has written on design industry issues and design business issues for design magazines and for publication through the Design Institute’s publications.

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