100 Archive Survey Report

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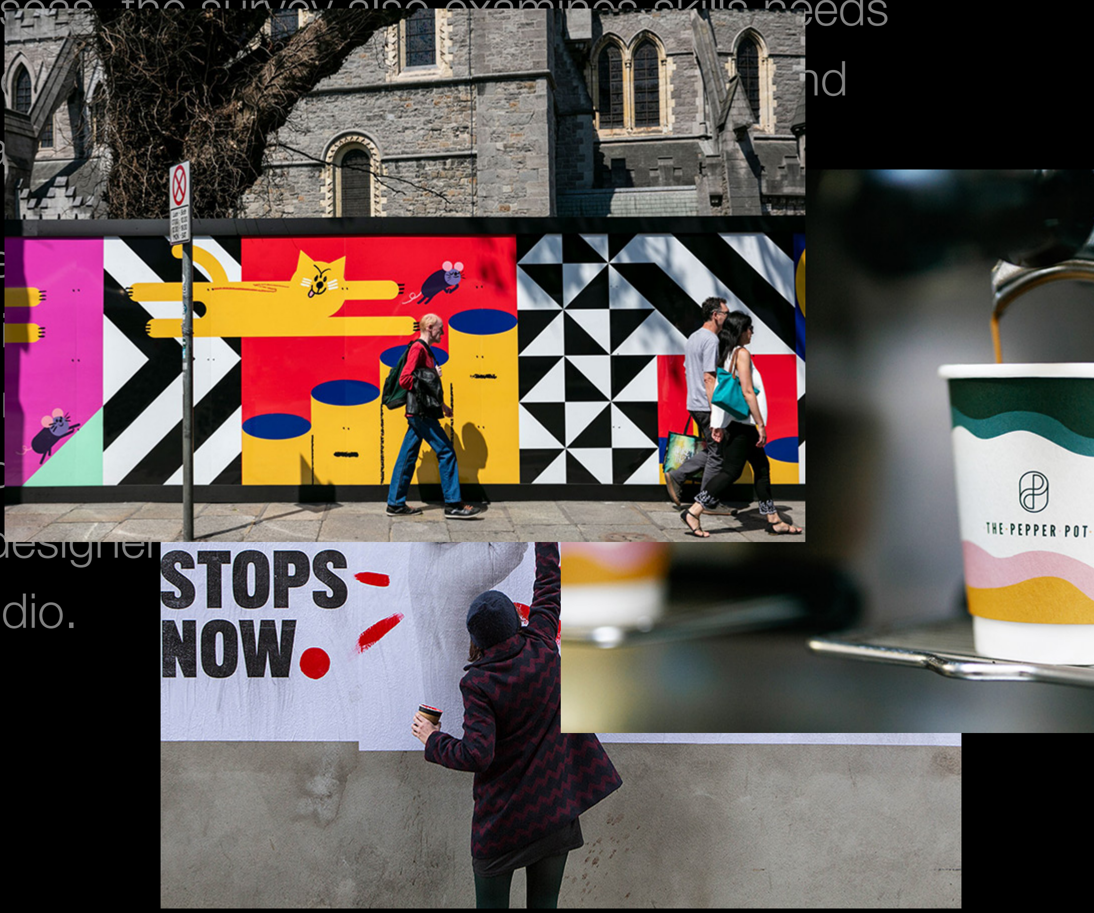

Survey report by

QUIDDITY

This document presents the results of a recent survey examining the current landscape of the Irish Graphic Design Industry, conducted by the100 Archive. In addition to profiling the background and experience of Irish designers working in Ireland and overseas, the survey also examines skills needs amongst designers and their attitudes to the industry and profession overall.

In this report, we look at the overall results from the survey, but also how attitudes and needs differ according to three designer categories: employed designers; freelance designers (including a combination of employed and freelance); and designers who are also studio owners or partners in a studio.

Fieldwork

The survey opened in December 2016 and data collection ended in January 2017. The total number of respondents to the survey was 207. Of the 207 respondents, 103 were paid a salary by an employer, 23 classified themselves as a combination of employed and freelance, while 23 were doing freelance work exclusively. 26 respondents were running their own business and a further 20 were partners in a business. The remaining respondents consisted of 6 people currently working as Interns and 6 working as educators or academics.

Demographic Profile

Age.

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
21-30	38%	35%	51%	11%
31-40	44%	50%	42%	48%
41-50	17%	13%	7%	39%
51+	1%	2%	0%	2%

Table 1. Age of Respondents

As might be expected, freelance designers and design studio owners/partners were on average older than those in full- or part-time employment. Approximately, two-thirds of freelancers were over 30, whereas more than half of those in full- or part-time employment were under 30 and only 7 per cent were over 40 years of age. By contrast, 41% of studio owners/partners were over 40 and only 11% were under thirty.

Gender.

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Female	32%	33%	38%	13%
Male	68%	67%	62%	87%

Table 2. Gender

32% of designers surveyed were female. However, female designers were over-represented amongst those designers in full- or part-time employment, representing 38% of employed designers surveyed. Of the 46 studio owners/partners who participated in the survey, only 6 (13%) were female.

Exactly 50% of designers believe that the design industry is a gender-neutral culture. However, amongst women, this proportion is much smaller (36%). Whereas 41% of designers overall believe that the design industry is a masculine culture, 58% of female designers do.

Q. Do you think that the graphic design industry is…?

	Overall	Female Designers	Male Designers
A Feminine Culture	1%	1%	1%
A Gender-Neutral Culture	50%	36%	57%
A Masculine Culture	41%	58%	32%
Don’t Know	8%	5%	10%

3. Design Industry Culture

Background & Experience

98% of all designers surveyed had successfully completed a degree or higher degree, with 86% having completed a degree or higher degree in Graphic design, compared to 36% in Illustration and only 9% in Fine Art.

The average career length in design amongst designers was 10 years. However, this varied between the various categories of designer. Those in full-time employment had an average career length of 7 years, compared to an average of 16.5 years amongst studio owners/partners.

Q. How long have you been working in design, in years?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Average career length	10 years	10 years	7 years	16.5 years

Table 4. Designer Career Length

*{{**commentary:** this indicates a trajectory towards greater independence/autonomy over the course of the average designers' careers. And, as such, it might suggest potential skills gaps / opportunities for designers as they progress through their careers.}}*

Working Conditions

Working Week & Compensation

Q. How many hours do you work a week?

	Overall	Freelancers	Employed Designers
Fewer than 30	9%	24%	2%
30-40	43%	35%	46%
40-50	40%	37%	44%
50-60	7%	4%	9%

Table 5. Working Week

83% of freelance and employed designers worked between 30 and 50 hours a week, with 43% working 30-40 hours a week and 40% working 40-50 hours a week. Only 9% worked fewer than 30 hours a week and just 7% more than 50 hours a week. However, amongst freelancers, this proportion was significantly higher, at just under a quarter (24%). The benign interpretation of this disparity in hours between freelancers and employed designers might be that freelancers are simply choosing to work less. However, the table below suggests that it is much more likely that some freelancers are involuntarily underemployed.

Q. Would you prefer to work more or fewer hours than you presently work?

	Freelancers	Employed Designers
Prefer to work more	17%	3%
Prefer to work less	33%	48%
Happy with current workload	50%	50%

Table 6. Satisfaction With Workload

While half (50%) of freelancers and employed designers were happy with their current workload, 17% of freelancers surveyed would prefer to work more hours compared to only 3% of employed designers. Separately, 43% of the freelance designers completing the survey found the unpredictability of their income difficult, compared to 52% who felt ok about their unpredictable income.

When not designing, 84% of respondents are spending their time answering emails, 72% are spending their time going to meetings and 67% spending their time doing project-related research.

As might be expected, freelancers allocate a much greater amount of the time spent not designing on business generation and management, than designers in paid employment do. For example, freelancers are much more likely to spend time not designing on budgeting & schedules (46% vs. 26% amongst employed designers), sourcing & liaising with suppliers (35% vs. 24%) or writing tenders & proposals (28% vs. 20%).

What are you doing at work when you are not designing?

	Overall	Freelancers	Employed Designers
Answering Emails	84%	85%	83%
Going to Meetings	72%	70%	74%
Project-Related Research	67%	61%	67%
Budgeting & Schedules	32%	46%	26%
Sourcing & Liaising with Suppliers	29%	35%	24%
Writing Tenders & Proposals	24%	28%	20%

Table 7. Non-Design Tasks

*{{**commentary:** some of these answers - see specialism + identity + satisfaction too - suggest the life of a freelancers as one of a generalist whereas the studio responses suggest that they mostly require freelancers as specialists - two paths of the freelancer!}}*

Working Conditions

Overall, attitudes towards working conditions amongst designers were positive. Only 18% of employed designers rated their career progression and structure as poor or very poor. This proportion was larger (24%) amongst freelancers than employed designers (18%). More than two-thirds (68%) of respondents rated their working conditions good or very good in terms of working space. Only 4% rated their working space as poor or very poor.

A slightly larger proportion (70%) rated the equipment available to them in their work as good or very good, while 9% rated their equipment as poor.

However, when asked to rate their working conditions in terms of communication, the response was less positive. Just over half (53%) of respondents rated their working conditions good or very good in terms of communications.

Q. How would you rate your working conditions in the following areas:

	Overall		Freelancers		Employed Designers	
	(V) Good	(V) Poor	(V) Good	(V) Poor	(V) Good	(V) Poor
Career Progression & Structure	52%	19%	41%	24%	58%	18%
Working Space	68%	4%	50%	4%	77%	5%
Equipment	70%	9%	59%	9%	77%	8%
Communication	53%	13%	54%	9%	53%	15%

Table 8. Working Conditions

Professional Representation

Q. Are you a member of an industry representative body?

	Overall	Freelancers	Employed Designers	21- 40 yrs	41+ yrs
Yes	27%	17%	28%	25%	37%
No	73%	83%	72%	75%	63%

Table 9. Professional Representation

Of the 161 employed and freelance designers represented in the survey, 43 (27%) were members of an industry representative body. It is worth noting that those groups perhaps most in need of representation (e.g younger designers and those in freelance employment) were the least likely to be members of a representative body.

Of those 43 respondents, 26 (60%) were members of IDI. 13 respondents were members of ICAD and 12 were members of ISTD. 53% of members were either quite satisfied (51%) or very satisfied (2%) with the level of representation provided, with 47% either quite dissatisfied (42%) or very dissatisfied (5%).

Skills & Training - Huge Demand For Training
It is encouraging that, of those currently in paid employment, 57% had been offered or received training in their current employment. However, the demand for training is much greater than this.

96% of all employed and freelance designers indicated that that there are additional skills or training that they would like to develop or acquire. Coding and Programming was considered the most useful skill to develop or acquire: identified by 25% of employed and freelance designers, more than twice as many as the next most popular (art direction, 12%), followed by moving image (11%), strategy (10%) and design thinking (9%).

Q. Which skill do you think it would be most useful for you to develop or acquire?

	Overall	Freelancers	Employed Designers
Coding / Programming	25%	35%	20%
Art direction	12%	13%	14%
Moving image	11%	7%	13%
Strategy	10%	7%	53% / 15%
Design thinking	9%	2%	13%
Self-promotion	2%	7%	1%
Project management	5%	11%	2%

Table 10. Desired Skills

However, when we compare the skills identified as most useful to acquire by employed designers to those identified by freelance designers, there are differences. For designers receiving a salary, coding/programming (20%), moving image (14%), along with design thinking and art direction (both 13%) were considered the most useful skills to develop or acquire. Amongst freelance designers, coding/programming (35%), art direction (13%) and project management (11%) were considered the most useful to acquire.

Of the 161 employed and freelance designers represented in the survey, 73 (45%) said that they were able to code/programme.

Q. Can you code / programme?

	Overall	Freelancers	Employed
Yes	27%	17%	28%
No	73%	83%	72%

Table 11. Coding Ability

Specialisms & Design Identity

In terms of specialisms, 41% of all respondents surveyed identified their PRIMARY specialism as “Graphic Design” and a further 19% chose “Branding”. Freelancers were more likely to choose “Graphic Design” as their specialism (50%) than either studio owners (35%) or employed designers (40%), whereas studio owners were considerably more likely to choose branding as their specialism (35%) than either freelancers (9%) or employed designers (17%).

Q. Which of the following best describes your PRIMARY specialism?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Graphic Design	41%	51%	40%	35%
Branding	19%	9%	17%	35%
Web Design	7%	7%	9%	9%
Typography	5%	9%	4%	4%
Editorial Design	5%	4%	5%	-

Table 12. Primary Specialism

While 23% of all respondents identified their design approach as “User-centred” and a further 22% chose “Conceptual”, 26% of freelancers said that they didn’t have one, compared to only 17% of employed designers and 20% overall.

Q. Which term best describes your design approach?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
User-Centred	23%	20%	27%	20%
Conceptual	22%	13%	23%	24%
Don’t Have One	20%	26%	17%	24%
Other	5%	2%	2%	13%

Table 13. Design Approach

Your Clients

Client relationships are critical to design work. 61% of designers believe that their work is only as good as their clients let it be.

When asked what has the biggest impact on whether clients affect the quality of their work, 73% of designers answered “specific individuals” (13% answered “the sector they represent”). Responses to this question varied amongst categories of designer, from 96% (44 of 46) amongst studio owners/partners believing that “specific individuals” had the greatest impact of the quality of design work, compared to 62% amongst freelancers.

Q. Generally, what do you think has the biggest impact on whether clients affect the quality of your work:

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Specific individuals	73%	62%	70%	96%
The sector they represent	13%	20%	13%	-

Table 14. Client Impact on Quality of Work

22% of all respondents say that they feel compromised ethically in their work. Studio owners/ partners (17%) are slightly less likely than other categories of designer (freelancer 22%; employed designer 23%) to feel compromised ethically in their work.

Q. Do you ever feel compromised ethically in your work?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Yes	22%	22%	23%	17%
Sometimes	24%	22%	24%	30%
No	55%	57%	52%	52%

Table 15. Ethical Compromises

98% of studio owners/partners have said ‘no’ to a job, compared to 83% of freelancers.

Q. Have you, or the company you work for, ever said 'no' to a job?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Yes	14%	17%	17%	2%
No	86%	83%	84%	98%

Table 16. Refusing Work

The most popular reason cited by studio owners/partners for refusing work was “poor client relationships”, identified by 33% of owners/partners. Separately, 59% of respondents overall said that their clients “always” or “regularly” take an active role in the design process.

Approximately two-thirds of designers (67%) meet their clients face-to-face at least monthly. However, as might be expected, this varies greatly between categories of designer. 61% of employed designers meet their clients face-to-face at least monthly, compared to 80% of studio owners/partners and 74% of freelancers.

Q. How regularly do you meet clients face-to-face?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Weekly	40%	39%	36%	54%
Monthly	27%	35%	25%	26%
Less often	27%	20%	32%	17%
Never	6%	7%	7%	2%

Table 17. Frequency of Client Meetings

87% of designers like their clients, with studio owners/partners (98%) more enthusiastic about them than employed designers (81%).

Your Work

Only 20% of employed designers and 22% of freelancers are designing what they thought they would be designing when they started their careers, compared to 37% of studio owners/partners.

Q. Are you designing what you thought you would be designing when you started your career?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Yes	26%	22%	20%	37%
Sometimes	39%	41%	40%	39%
No	35%	37%	40%	24%

Table 18. Design Expectations

Despite this, employed designers are also more likely to think that their work is better than that of their peers (24%) compared to other categories of designer (freelancer 17%; studio owner/partner 15%).

Q. How do you think your most recent work compares to that of your peers?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Better than most of my peers	20%	17%	24%	15%
As good as most of my peers	60%	54%	56%	74%
Worse than most of my peers	12%	15%	7%	4%
Don't know	8%	13%	13%	7%

Table 19. Peer Comparison

And freelancers are more likely to think that their work is worse than that of their peers (15%) compared to other categories of designer (employed designer 7%; studio owner/partner 4%).

In terms of c satisfaction, freelancers have much lower levels of satisfaction (quite satisfied + ve atisfied combined) than other categories of designer (freelancer 74%; employed de er 86%; studio owner/partner 91%). More strikingly, freelancers also have much higher ls of life dissatisfaction than other categories of designer (freelancer 22%; employed de er 10%; studio owner/partner 7%).

Q. All things considered, how satisfied are you with:

	Overall		Freelancers		Employed Designers		Studio Owners / Partners	
	(V) Satisfied / (V) Dissatisfied		(V) Satisfied / (V) Dissatisfied		(V) Satisfied / (V) Dissatisfied		(V) Satisfied / (V) Dissatisfied	
Your career	85%	15%	74%	26%	86%	14%	91%	9%
Your life	89%	11%	78%	22%	90%	10%	93%	7%

Table 20. Life & Career Satisfaction

85% of studio owners/partners and 86% of employed designers would recommend graphic design as a career choice, compared to 70% of freelancers.

Q. Would you recommend graphic design as a career choice?

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Yes	83%	70%	86%	85%
No	17%	30%	14%	15%

Table 21. Design as Career Choice

Studio Profiles

Studio Size

The majority of studios (52%) had three or fewer people, including the respondent, working in the business. Only 6 of the 46 studios (13%) had 10 or more employees.

Description

57% (26/46) of businesses surveyed described themselves as “Studios”, with “Agency” and “Practice” (both 15%) the next most common terms used. There was also one “Foundry” and one “Partnership”.

Asked to describe their design approach, 24% chose “conceptual” and the same proportion (24%) stated that they didn’t have an explicit design approach. 20% (9/46) described their approach as “user-centred”.

Services

Traditional design services were by far the most frequently offered by the studios participating in the survey. Whereas 93% offered brand (inc. visual identities) and 91% offered print (inc. publications), only 41% (19/46) offered coding/programming services and just 20% (9/46) offered service design.

Graphic Design (35%) and Branding (35%) accounted for 70% of all studios’ primary specialism. The next most popular primary specialisms were “web design” (9%) and typography (4%).

Challenges & Business Environment

The tasks identified as most difficult in managing a studio generally related to business management, rather than design tasks. The most frequently cited by studios responding to the survey were: “increasing profitability” (identified by 59% of studios), “cash flow generally” (37% of studios) and “winning new business” (35% of studios). “Managing talent” was identified as a principal difficulty by only 15% (7/46) of studios surveyed.

Composition of Studio Staff

46% of studios responding reported having interns and, of those, 81% reported paying them a wage or salary, while 19% paid expenses.

We also asked studios about the non-design staff that they employed: 4 studios (9%) had a staff member responsible for business development; 5 studios (11%) had a design manager, while a further 9 (20%) employed a studio manager.

37% of studios (17) increased their use of freelance staff in the last 12 months. Freelancers were most frequently used in specialist domains, such as coding/programming (65% of studios used freelance coders/programmers), photography (63%), illustration (43%), and copywriting (also 43%). Studios’ use of freelancers may also indicative of particular skills shortages and gaps within the industry.

Attitudes to Pitching

85% of studios disagreed with the idea of free pitching or speculative work, but almost a quarter (24%) did such work. Of that 24% (11) that did free pitching or speculative work, none set a budget aside each year for this. 45% felt that the pitches were worth the effort, whereas 55% felt they were only “sometimes” (45%) or not (10%) worth the effort at all.

Business Promotion

Business promotion for design studios remains predominantly analogue. 87% of studios identified word-of-mouth/recommendation as their main source of work and less than a quarter (24%, 11/46) post updates to their main social media channels more than once a week. Nonetheless, 89% of studios reported feeling “quite comfortable” (52%) or “very comfortable” (37%) promoting their work,
57% of studios claimed to have been strategic in targeting particular types of work, with 84% regarding their strategy as successful.

Costing

96% of studios estimate every job before commencing, with 63% basing estimates on a combination of the estimated number of hours a job will take AND the value-add it offers to the client. Only a third (33%) base estimates solely on the estimated number of hours a job will take. Exactly half (50% - 23/46) of all studios charge extra for client amendments.

Industry Future

Despite the challenges of business, approximately two-thirds (67%) of businesses reported that their workload had increased over the last 12 months and only 7% (3/46) reported that their workload had decreased during the same period. 72% of studio owners/partners expected their revenue from design for digital to increase in the next 12 months, compared to 43% expecting revenue from design for print to do likewise, and 59% (27/46) were expecting to grow their studio in the future.

While 26% of all designers believe that, in 10 years’ time, print will be a rarified activity, this proportion is lowest among studio owners/partners (20%), compared to 30% amongst freelancers.

Q. In 10 years time do you imagine that:

	Overall	Freelancers	Employed Designers	Studio Owners / Partners
Print is dead	1%	-	2%	-
Print is a rarified activity	26%	30%	28%	20%
Print is alive and well	66%	61%	65%	70%
Don’t know	7%	9%	5%	10%

Table 22. Future of Print