



DECONSTRUCTING DESIGN

EXECUTIVE OVERVIEW

Industry report on design in the
Kingdom of Saudi Arabia (2018-2021)

ADHLAL + RESEARCH

ABOUT ADHLAL

Adhlal [أظلال](#) is a venture founded by Nourah Alfaisal to stimulate, develop, and champion a meaningful and competitive local design industry in the Kingdom of Saudi Arabia. We endeavor to grow with the Kingdom by investing in research, building community, advocating for local design, and incubating a marketplace and sustainable industry. Throughout this journey, we pledge to serve not only as a mentor to homegrown talent and an advisor to government, but also as a partner to an authentic industry that stands for “Made in Saudi Arabia.”

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LETTER FROM THE FOUNDER

January 23, 2022

Dear friends,

It is such a privilege and honor to present to you our first local design industry report for the Kingdom of Saudi Arabia.

These pages mediate a dialogue and bring together the designers creating local design as well as clients buying local design.

You have all taught us that in the Kingdom of Saudi Arabia, design is not just a cultural asset and socio-economic driver. Local design is a diplomatic force to be reckoned with. Design is a mindset. We now have a national documentation of the challenges facing local design industry development, and the many opportunities for growth.

Thanks to the visionary leadership of the Custodian of the Two Holy Mosques King Salman bin Abdulaziz Al Saud and the Crown Prince His Royal Highness Prince Mohammad bin Salman bin Abdulaziz Al Saud, local design has a special place in the future of the Kingdom.

I would really like to once again thank all our research participants for joining our research missions. You are all crucial assets for a thriving local design community and industry! Thank you for trusting Adhlal to present your many voices with our readers and stakeholders.

I am grateful to my team at Adhlal for all you continue to do to empower and champion local design in the Kingdom. There is so much to do, and as we hopefully step into a safer and healthier post-COVID world, I am truly excited to serve the local design industry together.x

I would like to thank the research and development team at The Zovighian Partnership for designing and conducting our research missions and authoring this new contribution to global literature.

May this industry report empower you as members and friends of local design in the Kingdom of Saudi Arabia. We stand committed to empowering each and every one of you with knowledge to thrive!

Yours sincerely,



Nourah Alfaisal
Founder, Adhlal

...in the Kingdom of Saudi Arabia, design is not just a cultural asset and socio-economic driver. Local design is a diplomatic force to be reckoned with. Design is a mindset.



FRAMING LOCAL DESIGN AS AN INDUSTRY: BACKGROUND & KEY TERMS

Today, we live in a Kingdom of Saudi Arabia (KSA) that is investing with full force in culture, heritage, and art, enabling new economies of domestic and international tourism. Our investments into new non-oil sectors, as well as infrastructure and construction, are creating unique opportunities for design. Vision 2030 is creating a nurturing and cathartic space for designers to create and innovate. We have the privilege of building a society and country that is intentional in its impactful outcomes.

Design is at the core of this potential. Design is first and foremost a means to meet socio-cultural and economic needs. It is a tool to enable productivity and a conduit for feasibility and expression. It necessitates the use of critical thinking to develop new ideas, problem-solve, create, test, and innovate functional solutions for society, businesses, and the environment. Without design, communities and economies cannot connect, engage, and generate value. In so many ways, it is a value creator that we take for granted!

At Adhlal, we champion the potential of design, and advocate its social and economic utility. We have the privilege of supporting and cultivating designers to help shape the future of our country; a future powered by transformation, potential and ingenuity, and built on our cultural heritage and traditions. Our purpose is to transform our design ecosystem into a full-fledged local industry with national and international impact.

This industry has already been seeded and bears important roots. Our heritage is a testament of its bearings. The design industry of tomorrow can be one that sustainably diversifies our economy from oil and contributes greatly to our society and national brand on the global stage.

For the purposes of this industry report, design is examined as an all-encompassing industry of multiple sectors ranging from architecture and interior design to visual graphics, fashion, and products.

Like any industry, it is structured with the economic dynamics of supply versus demand, and is driven by social and regulatory dynamics. The supply-side of this industry is defined as local designers and businesses that are based in and growing in KSA. That includes designers of Saudi nationality, as well as designers of all nationalities who are committed to designing in the Kingdom as their base. The supply-side includes not only freelancers, employed designers, design businesses, and charities dedicated to design, but also an entire supply chain that allows designers to achieve the complete value chain of creative journeys and product development.

The demand-side is characterized as buyers, clients, collectors, and patrons of local design creations, products, and services from all walks of life. Not only does our demand-side include individuals and households, but also enterprises and government entities who also have demands and needs for local design.

The glue that brings both our supply- and demand-sides together includes our regulatory environment, infrastructure, education services, and mentors, all of which are crucial enablers to elevating and providing for this industry.

We consider it both an honor, and indeed a privilege, to be with you as we collectively develop and grow a vibrant and thriving local design industry in KSA.

EXECUTIVE OVERVIEW

Objectives of this industry report

This first Saudi design industry report brings together the combined views, opinions, and sentiments of all members of the local design community. Its pages are thanks to and dedicated to the design community in the Kingdom of Saudi Arabia (KSA).

Our goals for this industry report are to:

1. Propose and agree on a national co-definition of design in KSA;
2. Understand the diverse demand- and supply-side perspectives on the challenges facing local design today; and
3. Explore the opportunities, requirements, and potential for a competitive, productive, and sought-after local design industry instituted in robust socio-economic growth fundamentals.

We have arranged this industry report into three analytical sections. Our pages begin with an introspective dialogue with design community members on what constitutes “design,” from which we propose the first national definition of design in the Kingdom. We then detail the many challenges faced by both demand- and supply-sides of the market, mediating their many converging and diverging perspectives. Our industry report closes with an exposition of the abundant opportunities to nurture and further develop a thriving local design community and industry in KSA.

Proposing the first national definition of design in KSA

We invited members of the design community in KSA to co-conceptualize “design” through community-led qualitative and quantitative research. Employing focus

group discussions (FGDs) to drive our qualitative exploratory study, the data we collected revealed three distinct analytical perspectives that characterize key parameters of design in the local marketplace.

From a reflexive perspective, where design is defined as it relates to the designer, it was characterized as being creative, a feeling, and a personal identity. From an outward-looking lens, where design is conceptualized as it relates to the user or audience, it was defined as provocative, functional, meeting a need, problem-solving, and value-creating. From a practice-focused perspective, where design is understood as a discipline, design is described as iterative and universal in nature. These characteristics and parameters were further explored and verified in a large quantitative market survey.

FGDs also afforded the opportunity to host debates on how design compares to art and engineering. Designers in our FGDs concluded that the distinction between design and art requires further discussion. The same conclusion was reached in conversations on design versus engineering. These non-conclusive debates further confirm the importance of collaboratively agreeing on a national definition for design.

Our respondents also shared their personal definitions of what it means to be a designer. We learned that the term “designer” is often used loosely to categorize or bundle various creative activities. In most cases, designers felt most comfortable with joining the term with their occupational specialization, such as “jewelry designer” or “interior designer.”

We then benchmarked our qualitative and quantitative collected data with an analysis of national definitions by countries that are significantly investing in their respective design communities and industries. Interestingly, our review of the global literature taught us that there is no one commonly recognized global definition and segmentation for design. Rather, every country that has a national priority to invest in design as an industry tends to set its own terms and parameters for what constitutes design. These countries have intentional strategies with national and local public and private stakeholders driving the equity of their “Made in” national trademarks.

Combining our community-centered research with this global benchmarking allowed us to posit a first national definition of design in the Kingdom. Our methodological co-definition is available in *The first national co-definition of design in the Kingdom of Saudi Arabia* section. We welcome further feedback and dialogue with the community.

We also present a segmentation analysis of the local design industry, exploring ten self-reported design fields and another 13 sub-fields. The ten fields identified by local designers are: graphic design, interior design, architecture, product design, fashion design, jewelry design, landscape design and urban planning, electronic gaming design, installation design, and industrial design. Our collected data was compared against countries with explicit national design strategies that are actively investing and developing design fields where they have competitive advantage. This detailed review indicates that many of the self-reported design fields that are actively invested in and strategically supported in our global examples do exist in KSA at a largely grassroots level.

Interestingly, our voluntary research participation especially attracted young and female respondents, eager to have their voices heard in this strategic community exercise. Our analysis explores the predominantly female demographic of our collected

data, noting the potential for gender-led and gender mainstreaming policies and initiatives. We also shed light on the younger designers and students stepping into this nascent industry, appreciating that local design is facing a unique generation shift.

Our section titled *The first national co-definition of design in the Kingdom of Saudi Arabia* provides our full analysis.

Challenges facing local design

Our qualitative and quantitative research exposed the personal and collective experiences of buyers and designers in the local market. By studying both the demand- and supply-sides of the industry, we were able to identify significant common ground between both, including concerns on:

Career respect & growth: Many buyers and designers expressed their frustrations with the still-pervasive perception that design is a hobby rather than a professional career. The general lack of societal respect, particularly an absence of support from family and friends, was also explored in our survey of designers working in KSA. Designers also shared their lived experiences with the labor market, where purposeful and sustainable jobs are hard to come by.

Education & knowledge: Our collected data highlights the lack of education and mentorship programs in the local market. This was a key theme raised in our quantitative research, where 33% of respondents said they struggle to access mentors, and 30% said they cannot find role models. Some participants highlighted the lack of native Arabic content in academia and vocational training courses, as well as few opportunities for specialization. Designers said they continue to find tuitions and vocational fees to be prohibitively expensive.

Intellectual property rights: Buyers and designers outlined the challenges in safeguarding and trademarking their designs, which risks stifling

both motivation and innovation. Copies and illegal reproduction, intellectual theft, and the lack of due process were especially highlighted.

National trademark equity: Respondents explained that local design is yet to gain substantive international recognition. Since the conclusion of our research missions, however, important initiatives have launched in both the public and private sectors to develop a national trademark of “Made in Saudi Arabia” as a means of building brand credibility and trust globally.

Pricing levels and standards: Several buyers and designers in our research repeatedly drew attention to the challenges of over-pricing, limited price control in local supply chains, and lack of pricing standards and transparency across the market. Designers explained their struggles with cost control and management due to overpricing across local supply chains. Some buyers remarked on the difficulties of selling local design to a consumer base that is increasingly price sensitive.

Quality: Many buyers and designers shared their key insights on the barriers to quality and quality control / assurance. They explained that quality can be a push-out factor that drives designers to use manufacturing and production capacities outside the Kingdom. Respondents also shared the inherent difficulties of building trust in the market when obtaining dependable and consistent quality is a struggle amongst designers and local supply chains.

Resources: Respondents spoke of their experiences with unequitable access to resources, which in some cases is pushing them to pursue design careers outside of KSA. Inadequate access to resources was a clear theme amongst survey respondents, with 39% who said they struggle to access manufacturers and 33% said it is hard to reach or find suppliers. Navigating the market was identified as a key challenge. Financial, technological, supply-chain-based, and logistical resource barriers to local design

were also highlighted.

Sales & marketing: Buyers and designers also highlighted their experienced difficulties in accessing the market, an indication that demand and supply are not at an efficient meeting point. The lack of platforms, points of sales, and exhibitions to boost visibility and client access were also debated. 33% of survey respondents said they struggle with accessing clients.

Our research also drew our attention to demand-side specific challenges. Buyers described how they buy local design as a charitable cause rather than as a consumer. While our fieldwork was conducted pre-COVID, observations on the repercussions and opportunities brought on by the COVID-19 pandemic are also noted in this section.

These challenges set the stage for identifying needs-based opportunities that can address and help resolve the barriers and problematics raised by both demand- and supply-side stakeholders.

Hosting discussions and debates on challenges and barriers to growth in our research sessions brought designers closer together and allowed us to see the strong convergence of views and concerns between both sides of the market. We were humbled to witness that our research become a space for solidarity and trust amongst our research participants.

Our section titled *Key challenges for local design in KSA* provides our full analysis.

Opportunities for design as an industry in KSA

Our qualitative and quantitative research set the stage for further consultative and strategy sessions to explore the ample opportunities for local design today. There are many directions the community and industry can take, and streamlining, prioritizing, and enabling all will require the vested collaboration and contributions of all. This section has been written for

the many local, national, and international stakeholders of design in KSA. Presented as twenty-one key priorities, it is our hope that the public sector, private sector, academia, civil society, local supply chains, as well as local and international designers will step up to collaboratively enabling local design in KSA:

We begin with 12 strategic recommendations to enable market development and growth:

1. Setting the national definition for local design: Initiating public consultations to review the proposed draft of the national definition of design in KSA published in this industry report is our first recommendation. Consensus would help adopt an official national definition for design in KSA, and galvanize all design stakeholders to collectively move forward.

2. Embarking in national strategic planning: Exploring the investment case for local design in KSA across our ten identified design fields is opportune. Studies of each field should include an assessment of natural and competitive advantages, their potential to contribute to Vision 2030, GDP, and their advantages for global cultural diplomacy.

3. Furthering standards for a national trademark: Strengthening local design and initiating strategic market development requires streamlining technical standards at every step of the design journey. From procurement and quality, to pricing and contract management, enabling and innovating strong standards can pave the way for a dependable and recognizable global “Made in KSA” trademark.

4. Fostering a competitive & efficient marketplace: Instilling healthy market dynamics for a competitive local design industry requires introducing motivating policies and regulations to ease doing business in KSA. This is a priority for the local design community of buyers and designers alike to optimize the meeting point between demand and supply.

5. Introducing industrial clusters for design: Organizing the industry with strategic and targeted zoning is opportune. This will facilitate access to resources and suppliers, while easing logistics, costs, and operations of doing business in local design. Local designers will be able to pass on the economic advantages of working in dedicated design zones to their clients with fairer and consistent pricing.

6. Investing in local supply chain development: Cultivating a nation-wide network of capacity-built local providers will motivate local designers to engage with local direct and indirect suppliers. This will also build tangible economic value with measurable contributions to GDP by increasing job creation, furthering wages and income, and also enabling profitability.

7. Building a transparent, information-empowered industry: Introducing regulations and policies that promote transparency and ensure equitable access to information for all local design stakeholders is paramount. We especially recommend consolidating and continuing to digitalize in multiple languages regulations, licenses, and policies needed for designers of all nationalities to be compliant with the law and good practices.

8. Prioritizing sustainability in industry development: Incubating industry while advancing sustainability values and policies will help position local design as a very relevant contributor to Vision 2030, the economy, and society at-large. It will also help strengthen the competitiveness of local design in global markets.

9. Designing for inclusivity & parity: Developing community and industry must be done with intentional inclusion values and policies that ensure meaningful engagement of all segments of society and economy. It will be key to not tokenize participation and guarantee parity across gender, age, and nationalities.

10. Promoting authenticity & diversity: Enabling local design must strategically foster authenticity and invite plurality. Diversity in design will be critical to creating value for different users and audiences. This will also be important to promoting community, social, and cultural identities, and as such furthering cultural diplomacy and social returns on investments.

11. Guaranteeing ethics & integrity: Introducing regulations for compliance in ethics and integrity will help further the trust, competitiveness, and collaborative opportunities for local design. Codes of conduct will need to govern the use of materials, layers of local supply chains, and conceptual development. Intellectual property rights must also be strengthened to safeguard local designers.

12. Inviting cultural diplomacy & international collaborations: Bolstering local design and designers to become ambassadors for KSA will help elevate national competitiveness and brand equity. By creating a stage for creativity and open curiosity, local design can also drive international partnerships with global expertise, businesses, and institutes to further develop the industry.

We then present seven recommendations for learning and career development:

13. Raising public awareness: Elevating positive social perceptions towards local design, designers, and design careers is critical to elevate and grow the community and marketplace. Launching public campaigns to initiate mindset shift will be key to ensure that any national strategy for local design is not limited by a less aware market demand-side.

14. Elevating design education & learning journeys: Investing in education programming, from schools and universities, to graduate programs and vocational training institutes is critical for local designers to thrive and maintain their success. Curricula must go beyond just technical learning modules to a versatile repertoire that includes

business management, communications, and the social sciences.

15. Facilitating mentorship & local content: Improving access to mentors and motivating designers from all walks of life to serve in a advisory capacity can unleash much talent in local design. Sharing rich local content and experiences in the form of success stories, role models, and case studies will help further the personal and professional potential of designers..

16. Enabling design careers: Advancing design careers by evolving local labor markets to better recognize and match talent with jobs and purposeful careers is critical to building industry. Supporting integrated policy development approaches and further developing curricula in universities to close the gap between the classroom and the job market is also crucial.

17. Facilitating access to funding: Offering innovative financing products and services in the banking industry to designer freelancers, SMEs, and larger businesses is crucial to expanding local design. Increasing investor awareness of the investment potential of local design and facilitating access between designers and investors can encourage a unique local deal pipeline.

18. Exhibiting designers for equitable access: Increasing exhibition space for designers is key to bringing supply and demand closer together in the local market. Ensuring access to space that is not prohibitively priced in a regular yearly calendar of events will help further the inclusivity, diversity, and competitiveness of local design.

19. Building design networks: Facilitating the gathering and interaction of designers, as well as local suppliers and mentors is crucial to bringing agility to local design industry development and growth. Utilizing technology to strengthen networks

and community is opportune to help further market efficiency.

And we close with our ongoing commitment to data with two recommendations:

20. Documenting local design heritage: Investing in local design public archives and inventory is a prerequisite to safeguarding heritage. Documenting heritage also helps inspire local content creation and innovation. Importantly, equitable access to heritage repositories with historically accurate data will be important for designers across all design fields to build upon local and national legacies.

21. Investing in research & development:

Collecting local data and content repositories is paramount to building an industry with an evidence-centered lens. Grounded research needs to be commissioned regularly. Ensuring accessibility and public awareness for the local design community to capitalize on research is key. Stronger data can help reduce the barriers to entry and engagement of local design stakeholders keen to participate in industry growth.

These opportunities are abundant and require careful coordination between multiple stakeholders. Importantly, industry-building requires the unleashing of a vibrant private sector, civil society, and academia ecosystem. The public sector should take on an enabling role rather than assume a managing or directive capacity. Buyers, patrons, and investors are crucial building blocks for a sustainable and equitable local design industry.

It is crucial that designers be given ownership of these many opportunities. To flourish moving forward, designers must be elevated as decision-makers with agency so that they may directly shape their future. We believe that all these opportunities are within reach and are very excited for what the future holds for local design.

As KSA begins to look forward to a post-COVID world, it is also opportune to integrate the learnings from the pandemic in the decisions, activations, and growth efforts of the local design industry.

Our section titled *Key opportunities to activate local design as an industry in KSA* provides our full analysis.

Methodology

Adhlal commissioned The Zovighian Partnership to design and conduct two research missions to explore both the demand-side and supply-side of the local design industry in KSA.

Our first research mission was a demand-side examination, investigating the extent to which industry dynamics are driven by demand fundamentals. Our extensive findings provided the basis for our second research mission, focused on examining the supply-side of the industry and giving voice to locally-based design constituents.

Both research missions were designed as community-centered examinations of local design, with a participant recruitment strategy that focused on inclusivity and diversity. Importantly, data management protocols were designed to ensure deep listening and representation of a wide range of buyers and designers alike.

Due to the paucity of information on the design industry in the Kingdom, an exploratory, deep listening blended research methods approach of both qualitative and quantitative research needed to be adopted. To fully represent the opinions and views of our research participants, focus group discussions (FGDs) were deemed the most appropriate form of inquiry to ensure the collection of valid, reliable, and insightful qualitative data. Each FGD was designed to include four to eight participants, allowing for 90 minutes of rich and open discussions. Our data collection was bolstered with an industry-wide survey. This quantitative data served to broaden

our investigation of the supply-side of the local marketplace, inviting designers based in KSA to answer a three-minute set of 17 questions online or in paper form.

In total, we welcomed 18 respondents in our demand-side focus group discussions, 36 in our supply-side focus group discussions, and 320 eligible respondents in our survey.

While fieldwork was conducted pre-COVID, the impact of the COVID-19 pandemic on different design fields, stakeholder groups, and steps in the creative journey is also examined.

You can turn to our *Methodology* section to learn more about our research design, data collection, limitations of our study, research ethics, data analysis, and commitments to further research.

Looking forward

The local design industry in KSA is rapidly evolving as the country continues to advance with Vision 2030 as its socio-economic engine. At Adhlal, we are firm advocates of the potential and capabilities of our thriving local design industry. It is our mission to continue to serve as a primary data and knowledge repository for design stakeholders in KSA, providing our community and policy makers with methodological evidence-based research to advance the local design industry.

We are committed to encouraging and supporting industry development and growth, and hope this report provides the groundwork for broader investments into community and knowledge empowerment, and help strategically set the stage for sustainable industry development. We are excited to see how our newly presented insights positively impact the local design industry of the Kingdom and are ready to serve hand in hand in its emergence and growth.

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ABOUT THE AUTHOR

The Zovighian Partnership is a family-owned social investment platform, established by father and daughter in 2013. Deeply invested in research and development, we are committed to delivering ethical, inclusive, and innovative design, research, and prototypes. Our methodologies apply homegrown and sustainable frameworks, models, and mechanisms.

Our team of researchers, strategists, and analysts serve communities, nation-builders, organizations, and governments. We are commissioned at every step of your journey, from early-stage ideas to already-established impact initiatives, programs, and ventures. The team is privileged to be serving Adhlal, under the vision of Nourah Alfaisal.

The research team of research analysts, fieldwork experts, and data scientists are committed to building

information power with integrity. All commissioned research is scientific with customized deep-listening methodologies that safeguard strong participation and self-determination, all to deliver meaningful and ethical data.

Our venture and the family re-invest our financial, political, and intellectual capital into The Zovighian Partnership Public Office, our growing peace-building impact portfolio for communities and cities in crisis.

We are committed to delivering significant resources to bringing grounded methodology, sound governance, and rigorous strategic thinking to our Public Office clients. We hold ourselves accountable to giving voice to the diversity of views that are central to long-term and sustainable peace and socio-economic enablement.

ACKNOWLEDGEMENTS

We would like to extend our sincere gratitude to all members of the research and strategy teams who conducted our two research missions and made the launch of this first Saudi design industry report possible!

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