ADHLAL

DECONSTRUCTING DESIGN

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

> ...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.

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.

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

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

Our 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 enjoining 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.

THE FIRST NATIONAL CO-DEFINITION OF DESIGN IN THE KINGDOM OF SAUDI ARABIA

"Design is a feeling, it touches you. [...] it's something that changes the way you feel."

– An emerging graphic designer

What is design in the Kingdom of Saudi Arabia?

Through community-led research, we consulted members of the design community in the Kingdom of Saudi Arabia (KSA) to collaboratively define "design" as a practice, community, and industry.

Details on how our research missions were conducted can be found in the *Methodology* section.

The insights and views of designers from seven predominant local design fields at various stages of their careers are examined in this industry report. Designers shared their strong positive conceptions of design, which included inward-looking reflections, user-based perspectives, and practice-focused conceptualizations. They brought to our attention prevalent ongoing debates in the community, defining and differentiating design against disciplines like art and engineering. They also shed light on what makes a designer.

We then compared our collected data with how countries are putting forward national definitions for local design to uplift and grow their respective design communities and industries. A global mapping of national definitions is presented in *Exhibit 1: Proposed national definitions for local design benchmarked by country*. We conclude this section of our industry report by proposing a first-time national definition for local design in KSA.

We invite our readers – members of the design community, students and academia, private sector players and investors, and public institutions – to study and contemplate our findings. You will discover the dynamism and energy of our design community, with passionate debates, areas of consensus, and safe shared space for healthy disagreement and debate. Collectively, designers self-determined their own identities, practices, and senses of belonging, setting the stage for much more discussion and deliberation.

Conceptualizing design

Designers in our focus group discussions (FGDs) eagerly shared the many attributes that contribute to defining design, framing positive conceptualizations of design in KSA:

- Reflexive – design as it relates to the designer
- Outward-looking – design as it relates to the user or audience
- Practice-focused – design as a discipline

Reflexive — design as it relates to the designer

Many designers spoke about design in relation to themselves and their roles in creative journeys. This included design as creativity, as a feeling it inspires and / or represents, and as an extension of personal identity.

Creative

"Design is creativity." – An established architect

"Design is the embodiment of creative ideas." – An established jewelry designer

Creativity was often a starting point in our FGDs when designers were asked to define and describe design. As such, design is clearly an inherently creative discipline and process in KSA.

The United Kingdom (UK) and Japan also include creativity in their national definitions of design, with the UK emphasizing its innate nature, whilst Japan classifies design as a process of creating the environments in which we live.

A feeling

"Design is an expression of the person's mood." – An established jewelry designer

"Design is a feeling, it touches you. [...] it's something that changes the way you feel." – An emerging interior designer

Designers described how emotion is often the driving causal force behind the design process or is a primary outcome of design.

In the national definition proposed by Australia, the notion of design as a feeling is further expanded to include the nature of design as a sensory experience, whereby design has the capacity to change how one interacts with and feels, about the world.

Personal identity

"I can know someone based on the designs that she exhibits." – An established jewelry designer

"A design is the way you express what's in your head." – An emerging fashion designer

The inherent personal manifestations of design as both a process and an outcome were prevalent in many of our FGDs. Designers explained how personal design is, and how it is deeply part of identity.

Interestingly, while the UK does acknowledge this personal dimension, other countries benchmarked in our global mapping focus their national definitions more on the macro and socio-economic outputs of design.

Denmark

"Good design is an increasingly important means for businesses to hold their own in international competition. Design has the power to make products and services more attractive to customers and users, so they are able to sell at a higher price by being differentiated from the competition by virtue of new properties, values and characteristics."[3]

Sweden

"Design is a work process for developing solutions in a conscious and innovative way where both functional and aesthetic requirements are included based on the user and the planet's needs. Design is used for the development of goods, services, processes, messages and environments."[7]

Finland

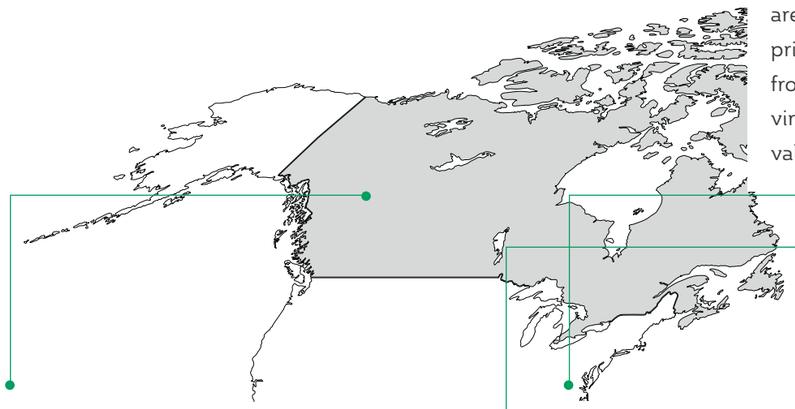
"In this programme, design means planning which takes aesthetic and ethical considerations, serviceability and marketing into account and which is targeted at businesses in industry, trade and services and public sector organizations. The object of design may be a product, a service, communications, the living environment, and a corporate or organizational identity."[11]

India

"Design has evolved into a new paradigm of development. It has transformed from a tool to make aesthetically pleasing and desirable products to a key role player in business to stay competitive and also in people's lives. [....]"[12]

South Korea

"Traditionally, design signifies the intellectual architectural activities for implementing a mental plan."[13]



Canada

"Design is central to innovation and must be understood broadly to encompass not just the aesthetic aspects of a product but also their overall technological performance and character. The act of design involves not just shaping a product's appearance but also involves a range of inputs into the creation of the form and function of a product and its production, marketing and appeal to the consumer."[1]

United Kingdom

"Design is the creation of a proposition in a medium, using tools as part of a process. While all design is innately creative, the nature of each element has the potential to differ between different types of designers."[4]

Ireland

"Design encompasses a broad range of meanings, including: development of utility of function and form, output associated with styling and aesthetics, a process for goods/service development, [and] a methodology to solve complex problems and find solutions. [....] [It] is an activity which can pervade all parts of the economy either as the primary output or utilized as part of a productive effort."[5]

Belgium

"A holistic dealing with matters, that besides the (re-) styling of products, extends to the application of innovative and alternative materials, ergonomics, engineering, ecology and ethics, psychology, culture and last but not least management."[6]

South Africa

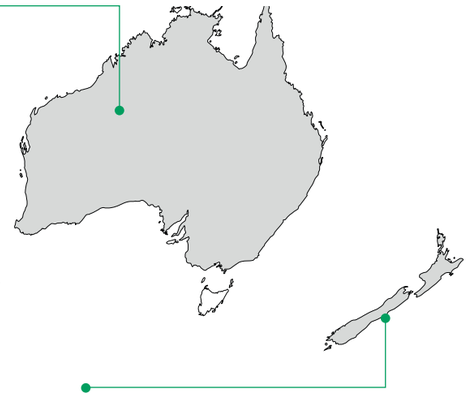
"Design uses human power to conceive plans and real products that serve human beings in the accomplishment of any indirect or collective purpose. It is a tool to address social and economic development issues in order to create greater wealth and higher market share."[2]

Turkey

"For the first time, design was referred as an activity to increase export opportunities and enhance the competitiveness in the global market."[8]

Japan

"Design activity is the creative act of forming [a] harmonized artificial environment that most sufficiently satisfies the various physical and psychological needs of human[s]."[13]



Australia

"Designs are the form characteristics of products which shape the sensory experience of a product and may provide functional or symbolic benefits to the user."[9]

New Zealand

"Design is a powerful tool of the modern, interconnected world. It is a key component of innovation, turning great ideas into services and products that consumers want to buy and use, it can help ensure that public services are user-friendly and more efficient, and it can help make cities more attractive places for citizens and skilled migrants to live and work."[10]

Sources: Global literature review; ZP analysis

"I think the most exciting aspect of design is when you are faced with challenges, and you have to find solutions."

– An emerging graphic designer

Outward-looking — design as it relates to the user or audience

The designers who participated in our research also emphasized the importance of the user and / or audience of a product or service, as well as how people interact with a design. Our FGDs qualified the importance of eliciting response, functionality, satisfying a need, solving problems, and creating value.

Provocative

"Anything that gives you a reaction... That makes you react in a new way." – An emerging interior designer

"I try to find a way to make it [...] in a way where people, upon seeing it, would say 'what is that!'" – An architectural engineering student

Designers described design from the perspective of how the user responds to any product or service. Triggering a specific response such as surprise, unfamiliarity, and intrigue allows designers to build in an intentional experience, and even memory, for their users and clients.

No national definition in our global benchmarking specifically addresses this aspect of design.

Functional

"I feel that design [...] has a reason for why we did it." – A product design student

"In my opinion, design is something that has purpose." – An established jewelry designer

A commonly shared notion amongst designers was that design needs to be functional and purposeful. Along with creativity, functionality was a foundational starting point in many of our FGDs.

This attribute is also present in the national definitions of Ireland, Australia, and South Africa. Canada further expands the concept of functionality, highlighting the further importance of performance of a design.

Meeting a need

"Design is a necessity." – An architectural engineering student

"Creativity is employed in making something to meet a need and then it evolves through gaining experience." – An established architect

Designers also highlighted the significance design brings to society-at-large, and how it serves to meet a need. Not only does design have purpose, but it also has a mandate to fill a gap that currently exists.

Japan and Sweden take this crucial quality further. Japan, in its national definition, prioritizes not only physical needs but psychological needs as well. Sweden uniquely and importantly includes the needs of the planet as requirements that design must meet.

" Without design, your product would be valueless."

– An architectural engineering student

Problem-solving

"I think the most exciting aspect of design is when you're faced with challenges, and you have to find solutions." – An emerging graphic designer

"[The problem] may not originally have a pain, but it is an opportunity that [...] could elevate people's quality of life." – A product design student

Some designers further expanded the functionality of design as a medium for problem-solving. Our FGDs illuminated the intentional creative process of identifying unmet needs and designing solutions. Designers described this process as both engaging and rewarding.

The national definition by Ireland describes the role of design as a practice and technique to resolve problems. Sweden describes design as a roadmap to attain solutions.

Value-creating

"Without design, your product would be valueless." – An architectural engineering student

"You may make use of something very simple, but you give it a higher value." – An established jewelry designer

There was often enthusiastic debate in our FGDs on the power of design as a positive contributor to society and economy. Designers highlighted that good design imbues a product with value by meeting the complex demands of the marketplace with innovation.

Indeed, most contemporary national definitions for design are clearly shifting towards acknowledging and embracing the value-add of design in its contributions to the world. South Africa, Denmark, India, Turkey, and New Zealand all prioritize this value creation in their national conceptualizations of design. New Zealand further highlights that design empowers public services to become more amenable and effective.

Practice-focused — design as a discipline

Designers in our FGDs often referenced design as a practice and discipline. Many described design as an evolving process and universal application.

Iterative

"Design is the initiation of change [...] an intent that I am changing something that exists whether it is an opportunity." – A product design student

"Design could predict the future, the design could benefit from the past, and benefit from the reality." – A product design student

Designers described the nature of design as a process of continual change and development. Many explained that design does not occur in isolation, but rather serves as an additive feature in a given environment. As such, design is constantly changing both itself and the world around it.

"Design is part of every industry beginning with the simplest to the most complicated."

– An established jewelry designer

"Design is something that has purpose. [...] art is not something that we use."

– An established jewelry designer

"I see no difference between art and design. [D]esign can be art and art can be design. They are both one."

– An emerging interior designer

"I am a designer no matter what I do. Whether it is art, because I feel like everything else falls under that. It is a subcategory of design, whether it is architecture, interior. "

– An emerging interior designer

No national definition in our global benchmarking specifically addresses this dimension to design.

Universal

"People don't know that everything falls under design." – An emerging interior designer

"Design is part of every industry beginning with the simplest to the most complicated." – An established jewelry designer

Our FGDs explored how design is intimately integrated into every aspect of our lives. Designers acknowledged that only by recognizing this can we truly appreciate the full indispensable application and contributions of design.

Belgium and Ireland recognize this all-encompassing universality of design in their respective proposed national definitions.

Popular debates in the design community

Our FGDs revealed debates in the design community in KSA on the scope of design. Participating designers spoke of two fields that are closely associated with design – art and engineering – and explained the relationships of each field to design, and where they saw their own work fit.

Design versus art

Art as a part of design:

"Whether it's architecture, interior, art, fabrication, it all falls under design." – An emerging interior designer

Design as a part of art:

"Art has a broad and comprehensive meaning that includes everything." – An established jewelry designer

"I feel that design is a type of art. I see things like that because I love all kinds of arts and for that I consider that arts are diverse, and design is only one type or field of art." – An emerging fashion designer

Design and art are different:

"Design is something that has purpose. [...] art is not something that we use." – An established jewelry designer

"In design you consider different aspects external from you, so you serve a purpose. [B]ut within art, you're creating something that serves [...] your own purpose and not an external purpose." – An emerging graphic designer

Design and art are the same:

"I see no difference between art and design. [D]esign can be art and art can be design. They're both one." – An emerging interior designer

Art and design are both attributed as part of the broader creative world. Designers in our FGDs revealed that the distinctions, parallels, and commonalities between both art and design require further discussion. A national definition for design in KSA will need to set a basis for this intimate relationship.

Design versus engineering

"I definitely don't introduce myself as an engineer." – An architectural engineering student

"I feel like I would [say I am an] engineer honestly." – An architectural engineering student

The debate on design versus engineering focused especially on the personal choice of self-identifying as either a designer or an engineer. Similar to the dialogue between design and art, a national definition for design in KSA will also need to propose a basis to either segment or bridge design and engineering.

What is a designer?

"I would call myself a designer because I am commissioned sometime to design for people." – An emerging graphic designer

"I'm a designer no matter what I do. Whether it's art, because I feel like everything else falls under that. It's a subcategory of design, whether it's architecture, interior." – An emerging interior designer

Critical to defining design is appreciating what and who the designer is. To complete our co-definition methodology, how designers see themselves at a personal and professional level becomes crucial.

Our FGDs highlighted that "designer" tends to be an effective umbrella categorization for many kinds of professions. For some participating designers, there were field-specific labels that characterize their disciplines and careers, such as jewelry designers or fashion designers.

Further learnings from proposed national definitions on design around the world

Some countries benchmarked in our global mapping introduce unique elements, parameters, and concepts to their national definitions of design that did not arise in our research with members of the design community in KSA. While these parameters therefore do not factor into a community-centered co-definition of design for the Kingdom, they do provide fascinating and critical insight into how conceptualization of design in KSA might develop and evolve over time.

Canada places much importance on technology as a product of design at a time of continued investments and innovation in digitalization, artificial intelligence, and other emerging technological disciplines. While the designers we spoke with did not necessarily prioritize technology as a product, we recognize significant efforts in KSA to embed digital solutions, including artificial intelligence, across key economic sectors and public services. We anticipate that design will increasingly play a leading role in this multi-industry commitment.

Belgium and Finland importantly incorporate ethics as a parameter of their national definitions of design. We deeply welcome this contribution to the literature and agree that framing design with an ethics-centered lens is increasingly indispensable. We would also maintain that introducing ethics into the definition of design provides a mechanism for accountability and social justice.

Canada and Finland recommend placing marketing as an integrated part of the design process, rather than as just as a tool to communicate design. Belgium includes management as a product of design. Sweden integrates messaging and communication as products of design. It is interesting to note the growing appreciation for design as a multi-layered system of processes that can optimize practices, frameworks, and disciplines, rather than just informing or strengthening such outputs.

India includes an expansive role of design as a mindset and means of development in its national definition. South Korea elevates design as a highly intellectual field, explicitly shifting away from being limited to a creative discipline. We strongly welcome this deep appreciation for design and agree that the power and impact of design needs to be recognized as a crucial contribution to society.

Proposing a collective definition for design in KSA

Our FGDs presented key insights and debates that must serve as critical guides for further conversation in the design community of KSA. Intentionally exploring the parameters of design importantly requires a safe space for healthy dialogue in academic, professional, and research circles. This will be important for design to mark its place in KSA. The designers we spoke to are adept in identifying that marking line for themselves, evidence of how important self-determination amongst design community members is to authentically defining design personally, communally, and nationally.

We can also appreciate that although numerous definitions have been proposed throughout the global literature, there is no consensus over what constitutes design. Bringing the diverse voices and views of our local design community together, a collective definition for design in KSA emerged:

> **Design is multi-disciplinary, iterative, and universal. It touches all aspects of life, economy, and country. It is a profoundly personal practice and process, involving and evoking creativity, emotion, individuality, and collectivity. Design can provoke, serve a function, meet a need, solve a problem, and create value. Design is a responsible and mindful community and industry.**

This co-definition of design in KSA is a starting point for further national conversation, debate, and exploration. Contributions from even more designers and members of the design community in the Kingdom is paramount and very welcome.

Segmenting the local design industry in KSA

Both our qualitative and quantitative research allowed us to map out for the first time the multiple fields of design in KSA. Our demand- and supply-side qualitative research explored and validated some design industry segments in our FGDs. By adopting a self-reporting data collection approach in our supply-side quantitative research, we were also able to further detail and validate this segmentation.

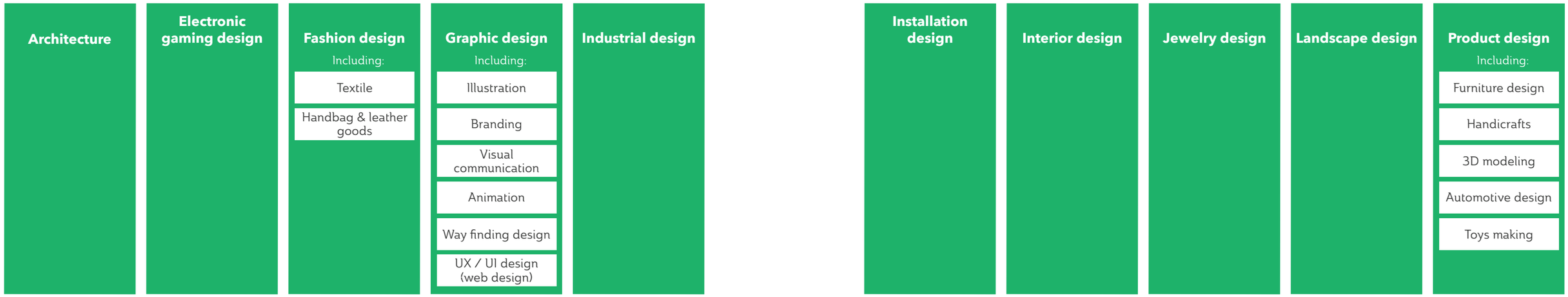
By consolidating this self-reported classification, our research allowed us to propose the first mapping of design as an industry in KSA. This integrated landscape of local design brings together multiple design fields and disciplines of local and international designers designing, creating, manufacturing, packaging, and selling design products and services in the Kingdom.

We identified ten principal design fields in KSA:

- Architecture
- Electronic gaming design
- Fashion design
- Graphic design
- Industrial design
- Installation design
- Interior design
- Jewelry design
- Landscape design
- Product design

These ten design fields also include 13 sub-fields, primarily in the fashion design, graphic design, and product design fields. Our analysis is presented in *Exhibit 2: Emerging market segmentation of the local design industry in KSA* below.

Exhibit 2:
Emerging market segmentation of local design industry in KSA



Note: Sub-fields were self-reported by survey respondents and later mapped into our proposed streamlined segmentation of local design. The sub-fields are indicative and not necessarily exhaustive.

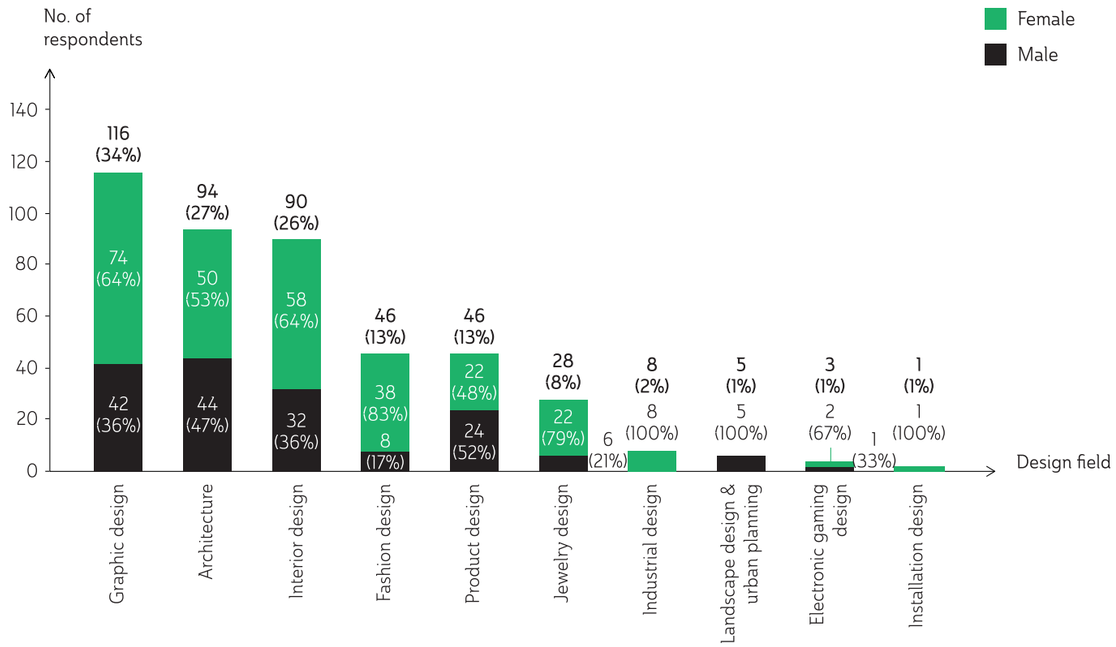
Sources: Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions & survey (2019-2020); ZP analysis

In our supply-side survey, we were also able to gain a first-time understanding of the size of some of these design fields. *Exhibit 3: Market segmentation of local design industry based on self-classification of supply-side survey respondents* shows that 35% of designers who participated in our local design survey self-identified as graphic designers, followed by 28% interior designers and 27% architects, with 14% each for product and fashion designers. The remaining self-identified as jewelry, landscaping, electronic gaming, and installation designers. We note that whilst industrial design emerged as a new design field in our qualitative research, it was not self-reported in our quantitative data.

Importantly, our self-reported data collection allowed designers to classify themselves under more than one design field or discipline, as seen in *Exhibit 4: Single versus multidisciplinary careers of supply-side survey respondents*. While almost 75% of our surveyed respondents self-classify as a designer in one design field, 23% described their careers as multi-disciplinary in one or more design fields.

This unearthed the versatility and multi-disciplinary nature of design professions, careers, as well as the community and industry. Given this learning, we did not ask respondents to self-identify to one primary design field, since for many, this did not make sense to their design identity, philosophy, and did not fairly represent their professions. This data parameter will be important for further exploratory market sizing of the local design industry.

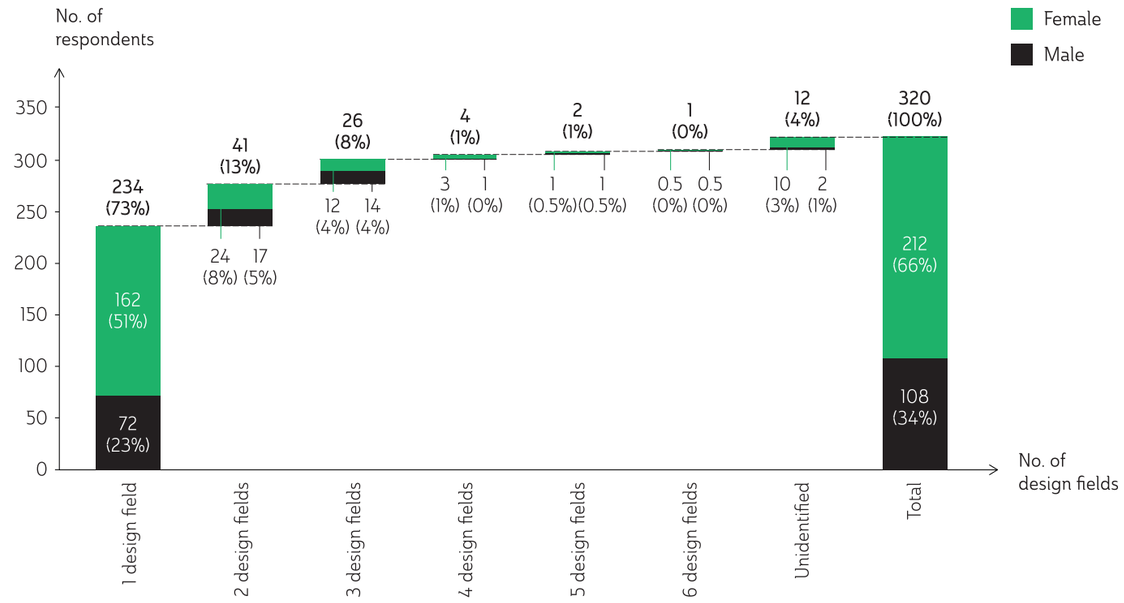
Exhibit 3:
Market segmentation of local design industry based on self-classification of supply-side survey respondents



Note: Total percentages are based on n=344 eligible focus group discussion and survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered to which design field / fields they currently work in. Given respondents could self-report their design classification with more than one design field, this total segmentation is not a market breakdown equal to 100%.

Sources: Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions & survey (2019-2020); ZP analysis

Exhibit 4:
Single versus multidisciplinary careers of supply-side survey respondents



Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

We then conducted a global benchmarking exercise to stress-test the emerging segmentation from our research with global design markets. A structured search was conducted to explore active design fields worldwide and examine their intersections across several countries. Interestingly, as seen in *Exhibit 5: Design fields actively championed in national design strategies benchmarked by country versus self-reported design fields in KSA,* we found there is no common or global design industry segmentation. Rather, every country that has embarked in the important effort of developing and activating a national design strategy has done so independently.

As such, the wording and parameters of design fields cannot be easily consolidated or collated in one structured segmentation framework. Despite the various studies published in the field and available in the global literature, there is a clear gap that can hopefully motivate further investments in global research in collaboration with national and global design stakeholders.

For the purposes of our analysis, consulting the existing body of literature allowed us to suggest a streamlined segmentation of design fields, drawing upon the national design strategies of 14 countries.

These referenced countries allowed us to draw up a list of 20 design fields and sub-fields. Importantly, given the disparity in the global literature, we opted out of distinguishing fields from sub-fields in our benchmarking, given no high-confidence methodology could be adopted for this exercise. We hope this amalgamation serves as a starting testbed for further engagement with national design councils and stakeholders around the world.

Interestingly, when we compared the findings of our bottom-up research missions with this benchmarking analysis, we found that the local design community has self-activated many of the design fields and sub-fields that are viewed as high strategic priority in other countries. In other words, there is the presence of a talent pool in KSA for almost every one of the listed design fields and sub-fields. The important question becomes: Which are the ones where KSA has significant competitive advantage to pivot these organic design disciplines into socio-economic engines for the country? While this is not a question any design industry policy maker can answer yet, our *Key opportunities to activate local design as an industry in KSA* section offers important parameters to kick-start that strategic exploration.

Exhibit 5:
Design fields actively championed in national design strategies benchmarked by country versus self-reported design fields in KSA

	Australia	Belgium	Canada	Denmark	Finland	India	Ireland	Japan	New Zealand	South Africa	South Korea	Sweden	Turkey	United Kingdom	Saudi Arabia
Advertising design	●	●	●												○
Architectural engineering & design	●	●	●				●							●	●
Automotive design						●									○
Communication design						●					●				○
Computer software design	●						●		●						○ [1]
Fashion design	●	●		●	●	●		●		●		●	●	●	●
Furniture design					●										●
Graphic design	●		●			●		●	●		●				●
Handicraft design		●	●		●	●		●		●	●		●	●	○
Human computer interaction							●								
Industrial design								●						●	●
Interior design	●	●	●	●		●		●	●	●		●	●	●	●
Jewelry design	●	●			●	●			●	●			●	●	●
Motion graphics, animation, & new media design	●	●	●			●		●	●	●	●	●		●	○
Product design					●		●		●						●
Textile design					●	●							●		○
Toys design				●								●			○
TV, film, & theatre set design			●			●				●	●		●		●
Visual communication design	●	●	●			●		●		●	●	●		●	○
Web design	●					●	●							●	○

LEGEND

- ● Actively supported through national design strategy
- ● Self-reported in research, mapped as design field
- ○ Self-reported in research, mapped as design sub-field

1. The data collected in Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions and survey (2019-2020) does not include self-reported distinctions between UI / UX for web design versus computer software design

Sources: Global literature review; Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions & survey (2019-2020); ZP analysis

The demographics of local design

With the participation of 344 members of the local design community in our research missions, we were able to gain a first-time understanding of the demographics of the industry.

Exhibit 6: Stage in career by sex of supply-side survey respondents also shows that almost 67% of our supply-side respondents identified as female. This high female representation sheds light on what appears to be a unique gender skewing of design as an industry. While this representation could also be partly due to more women designers wishing to have their voices heard as compared to their male counterparts, inferences can be made on the inclusion of women in the industry. For all stakeholders – from the public sector to the private sector, civil society, and academia – it is important to appreciate that local design comes with diverse female faces, voices, and views. Women are critical to policy decision-making, market development. Since the conclusion of our research, both public and private sector efforts have continued to advance equal and equitable access to regulatory, financial, and education opportunities for women, as well as fair access to key services in support of industry growth. These efforts are very welcoming, and barriers to enable and re-enforce these efforts must continue to be addressed.

An initial gender analysis on career development in local design, as seen in the same exhibit, shows that 58% of established designers (8 years in the field and more) who participated in our research are women, making up 19% of total women represented. This gender skew exists in emerging designers (4-7 years in the field) as well, with women constituting 68% of our respondents, equivalent to 22% of our total women respondents. Most interesting was the significant female representation in early-stage designers, which includes students studying design who are already engaging in design projects and initiatives. Women represented 71% of early-stage participating designers, equal to 54% of total female respondents. Our *Methodology* section provides further explanation on this organic gender representation that emerged out of our participant recruitment strategy.

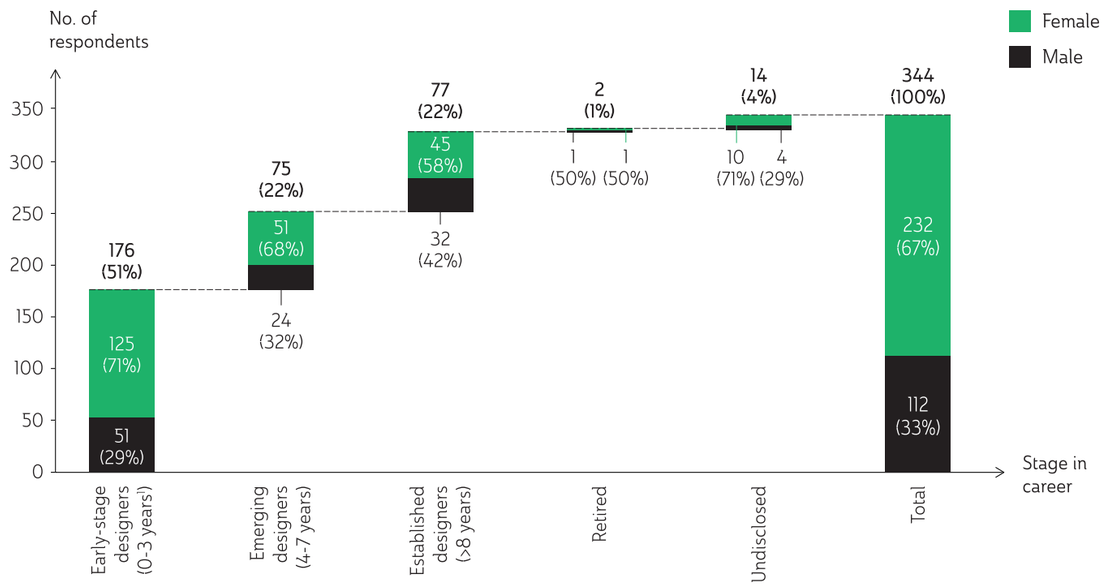
Also noteworthy was the high representation of young designers in our research, who also opted into both our qualitative and quantitative data collection. *Exhibit 29: Supply-side local design industry survey participation: Respondents by age group and sex (2019)* in our Methodology section shows that 80% of our supply-side survey respondents were young designers between 15 and 35 years of age. While the skew is significant, it is important to appreciate that our research respondents opted to participate in our research missions following a very broad participant recruitment strategy. Clearly, young designers wanted their voices to be heard in the pages of this local design industry report. As clearly, local design is not just a young industry, but a youthful one as well.

Over 50% of participants have been working in design for three years or less. Only 22% have been working in design for eight years or more. Given our research participant recruitment strategies, we did not actively target retired designers, who account for the only 1% representation.

What is striking is when we compare these gender and age demographics with the career choices made by designers in the local design industry in KSA. *Exhibit 7: Career track by sex of supply-side survey respondents* shows that only 32% of designers who participated in our survey were employed. Another 27% were freelancers or self-employed, and 18% were entrepreneurs and business owners. Very importantly, designers who participated in our survey have committed themselves to design as a career, with only 1% who self-identified as not working and taking on design as a hobby. While our research participant recruitment strategies especially targeted students in female-only universities, with 17% of total respondents being students, broadening the capacity of the labor market to absorb this young talent will be crucial. All this demands a significant mindset shift that is explored with calls to action in our *Key opportunities to activate local design as an industry in KSA* section.

Exhibit 6:

Stage in career by sex of supply-side survey respondents

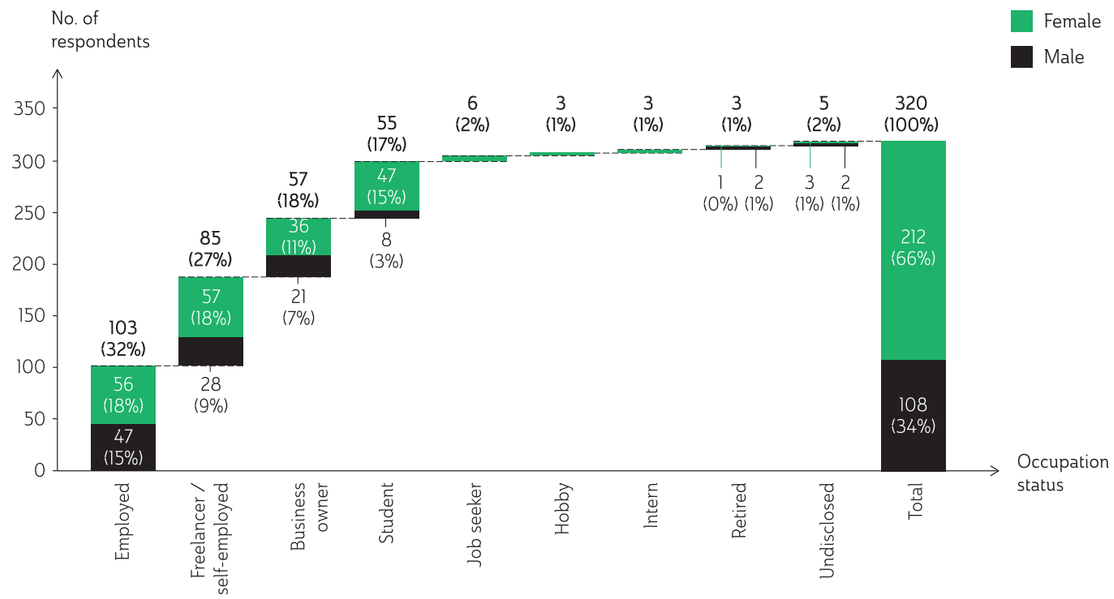


1. Early-stage designers includes students who have worked and have been exposed to the design industry
Note: Total percentages are based on n=344 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered in which career stage they are in currently

Sources: Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions & survey (2019-2020); ZP analysis

Exhibit 7:

Career track by sex of supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered which occupation status they currently hold

Sources: Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions & survey (2019-2020); ZP analysis

Relevant for our analysis and exploratory definition of design in KSA is that local design is not Saudi only. Rather, *Exhibit 28: Supply-side local design industry survey participation: Respondents by nationality and sex (2019)* in our *Methodology* section shows that of the twenty nationalities included in our research, at least 17% of our total respondents were from 20 other nationalities in the Arab world and beyond. Attributing local design as an internationalized community is valid for further study.

To continue developing and moving forward as a value-creating community and industry, design must occupy a distinct space within the broader socio-economic context and identity of KSA. It will be important to clearly define the space or spaces design does hold, setting the stage for strategic planning and investment in the development, growth, and sustainability of design in the Kingdom. In order to define this potential, it is critical to go beyond a quantitative representation of local design and intimately explore the dynamics of challenges and needs-based opportunities in KSA.

What are the key challenges facing the local design community?

Significant insights emerged during our research missions when examining and investigating obstacles and hurdles facing both buyers and designers in the Kingdom of Saudi Arabia (KSA). To enable design, it is critical to listen to what both demand- and supply-side market participants believe are challenges to a sustainable design community and industry.

Exploring local design by appreciating that there can be no supply without demand helped contextualize the interdependencies and interconnectivities of both sides of the market. Our demand-side research spoke to buyers, clients, collectors, and patrons of design products and services in KSA during focus group discussions (FGDs) with 18 participants. Our supply-side research engaged with designers in KSA from various design fields, stages in career, age, and nationality in a survey with 320 respondents, followed by a series of design field-specific FGDs with 36 participants. Details on the design, data collection, and data analysis are presented in the *Methodology* section of this industry report.

Very interestingly, our collected data does not present demand- and supply-sides that are worlds apart in views, perceptions, and interests. Rather, our findings demonstrate much agreement on the barriers facing design in KSA. This industry report also mediates between the unique perspectives and diverging views that emerged throughout our research. The challenges highlighted are both acute and chronic, preventing design from fully flourishing as an impactful local community and up-and-coming industry.

As such, this *Key challenges for local design in KSA* section presents:

- Difficulties for local design shared by both the demand- and supply-side
- Limitations experienced by the demand-side

Difficulties for local design shared by both the demand- and supply-side

Our FGDs with both demand- and supply-side participants included a series of areas of concern and challenges facing buyers and local designers in KSA, especially:

- Career respect & growth
- Education & knowledge

"It's not even seen as a career!"

– A private consumer of local design products

"I honestly believe that the obstacle the most of us encounter is employment."

– An architectural engineering student

- Intellectual property rights
- National trademark equity
- Pricing levels and standards
- Quality
- Resources
- Sales & marketing

Career respect & growth

Demand-side views:

"It's not even seen as a career!" – A private consumer of local design products

"Not viewed as a career." – A private consumer of local design products

Supply-side views:

"[...] I don't know which field I am going into and what opportunities come to me." – An architectural engineering student

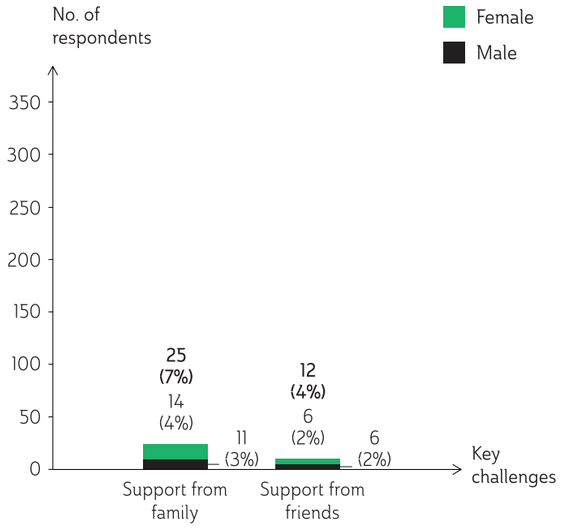
"I didn't find the perfect company that can help me to approach what I want, or get to where I want." – A start-up graphic designer

"I honestly believe that the obstacle the most of us encounter is employment." – An architectural engineering student

"The biggest step back for us is the older generation, they don't support this [innovation]." – A start-up graphic designer

"I was the first designer in my family too. Nobody knew what was design. Everyone had questions [...] it was a lot of pressure..." – A start-up graphic designer

Exhibit 8:
Societal challenges facing supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they face the challenge / challenges presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

"You don't find a proper education or mentorship programs that are developed in order to support these people [designers]."

– A corporate consumer of local design products

Challenges in finding jobs and pursuing long-term sustainable careers was emphasized in our FGDs with both our demand- and supply-side participants. Students and early-stage participants especially shared their anxieties and frustrations with the labor market and limited opportunities to build careers in design. Some also mentioned that these career development hurdles are obliging them to question the feasibility of remaining a designer in KSA. Some remarked that they have peers who have had to leave their design careers and pivot into other industries.

In some of our FGDs, female designers explained that they still face limitations due to the lack of gender mainstreaming in some design fields. They shared their concerns that despite design being increasingly female-led in KSA, there are still challenges facing women in architecture and engineering design fields given that construction sites continue to be very male-dominated.

Importantly, the lack of societal respect towards design as a sustainable and impactful career came up as well, often with deep empathy from buyers and patrons of design. Many participants expressed their disappointment towards society-at-large often still viewing design as a hobby rather than a career. The lack of support from family and friends for some designers also came up as a major limitation to succeeding as a designer. While this was a recurrent theme in our FGDs, which presented an intimate safe space for dialogue, the lack of societal support was not a major challenge raised in our survey. As seen in *Exhibit 8: Societal challenges facing supply-side survey respondents*, 7% of respondents said they struggled with family and 4% said they grappled with receiving support from friends.

Designers more advanced in their careers spoke about their challenges in garnering respect from their family and friends in their early career pursuits. Some designers explained that this lack of respect is also felt in how they are paid for their works and commissions, with many being offered a only fraction of what international designers and agencies earn.

As has been seen globally, the pandemic had a disproportional negative impact on women. Working from home due to COVID-19 came with significant pressure points on female designers, especially young mothers.

Education & knowledge

Demand-side views:

"You don't find a proper education or mentorship programs that are developed in order to support these people [designers]." – A corporate consumer of local design products

"I think, before focusing on the creatives, we need to focus on the people, and educating them on how to take it all and support [designers]." – A corporate consumer of local design products

"I feel that the problem is in the translation between the academic sector and the market. [...]"

– A product design student

"The other challenge I had was copycats. [....] So, even if you do patent something, you'll find a lot of people trying to copy what you're doing."

– A corporate consumer of local design products

"There is a need for know-how." – A corporate consumer of local design products

Supply-side views:
"I can frankly say that the beneficial material was not in Arabic because we already know the content of Arabic material and it doesn't offer anything new." – A start-up fashion designer

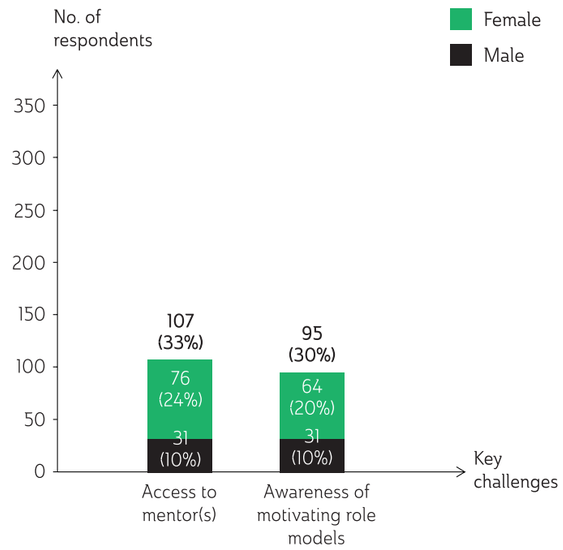
"[...] The fees of these courses are very expensive, [...] these courses are available right now because they were not available in the past." A start-up fashion designer

"I feel that the problem is in the translation between the academic sector and the market. [...]" – A product design student

Knowledge sharing and access to courses, education, vocational training, and mentors were highlighted by both demand- and supply-side participants during our research. There was a predominant view that finding and accessing information in the local design industry is yet to be strategically designed, organized, and made available. These concerns were interestingly shared by designers regardless of the stage in their career.

Exhibit 9: Mentorship challenges facing supply-side survey respondents shows that 33% of supply-side respondents confirmed that they struggle to access mentors. While 66% of our total survey respondents were female, it is important to note that 70% of respondents facing mentorship challenges were women at various stages of their design careers. Almost 30% of our survey respondents also said that they do not have an admirable role model that motivates or inspires them.

Exhibit 9:
Mentorship challenges facing supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they face the challenge / challenges presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Some designers noted that high-quality sources of knowledge and information are not available in the Arabic language. Pricing of education and training opportunities were often viewed as prohibitive.

In our FGDs, designers spoke about the challenges that they face due to their own personal struggles and characteristics. For some, time management was a serious issue. For others, risk aversion was near debilitating. For others, indecisiveness was personally inhibiting their growth. Designers identified these personal attributes, and others, as examples of areas where they do not find education and training to capacity-build these needed skills.

The need for education to be more practical in pursuing a career as a designer was also raised. Education to enable specialization was seen as a major hurdle to advancing careers, resulting in designers having to self-learn rather than build mastery in a systemic manner. Importantly, both buyers and designers recognized the need for education beyond the creative techniques and crafts of their vocation, citing the limited availability of high-quality courses to strengthen the legal, operational, managerial, financial, and entrepreneurial capacities of designers.

Intellectual property rights

Demand-side views:
"The other challenge I had was copycats. [....] So, even if you do patent something, you'll find a lot of people trying to copy what you're doing." – A corporate consumer of local design products

"I think also people need to respect the designers' design [...] you don't copyright your design, but people need to respect that. I'm not going to go and copy something; I'm going to create my own."

– An established jewelry designer

Supply-side views:
"I think also people need to respect the designers' design [...] you don't copyright your design, but people need to respect that. I'm not going to go and copy something; I'm going to create my own." – An established jewelry designer

Both sides of the market expressed similar concerns on the challenges to safeguarding and recognizing local design from a perspective of regulatory support and intellectual property rights. Concerns about imitations were shared, recognizing the lack of awareness towards breaching copyrights or mimicking the unpatented works of a designer. Buyers and designers noted how this barrier can impede the motivation to innovate and curtail efforts to build global competitive advantage.

National trademark equity

Demand-side views:
"I don't think the international community has [...] an idea of [...] 'Made in Saudi Arabia' [...] You're not in the international front, you are not there." – An investor in local design products

Supply-side views:
"[...] the Saudi product will be valued only when there is self-sufficiency in the country. [When] all the materials that they use, and all of the equipment are manufactured in the country itself." – A product design student

"I don't think the international community has [...] an idea of [...] 'Made in Saudi Arabia' [...] You're not in the international front, you are not there."

– An investor in local design products

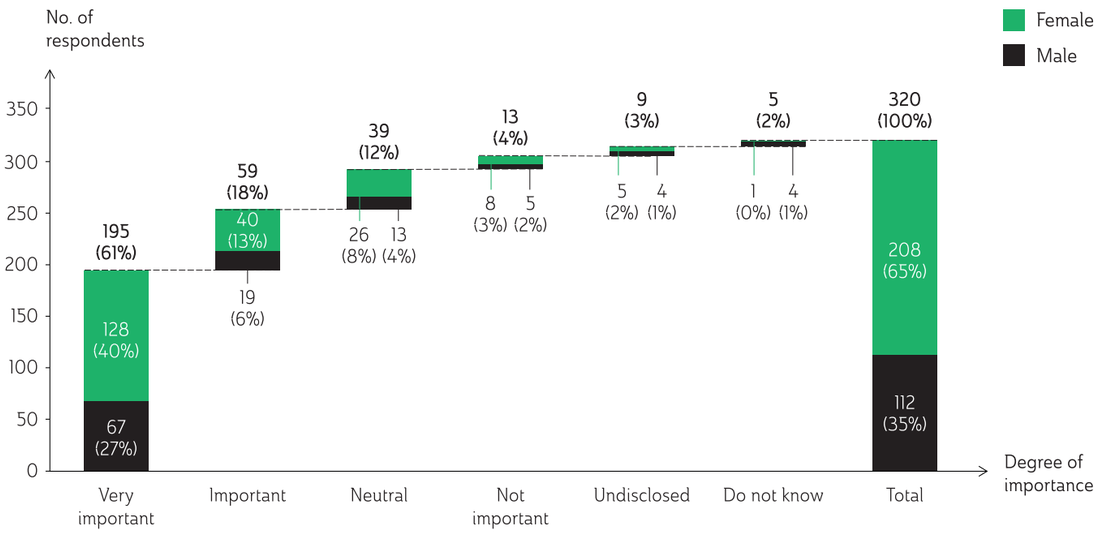
"[...] the Saudi product will be valued only when there is self-sufficiency in the country. [When] all the materials that they use, and all of the equipment are manufactured in the country itself."

– A product design student

"[...] providing something at a specific standard so in order for something to say 'Made in KSA' that I know 'Made in KSA' that means this and this and this and this." – An emerging interior designer

Since the conclusion of our research, efforts have been made in the public and private sectors to develop a national trademark of "Made in Saudi Arabia." Both sides of our market participants acknowledged that building a recognized trademark is early-stage with room for more strategic investments. They explained that success stories remain siloed and limited to a small group of designers, however these designers alone cannot build global "Made in Saudi Arabia" brand equity. Our survey validated this further, with 79% of respondents saying it was very important or important as seen in *Exhibit 10: Importance of recognizing design products as "Made in KSA"*. Only 4% found it not important.

Exhibit 10:
Importance of recognizing design products as "Made in KSA"



Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

"[If] I am buying something that is locally made, mass produced [...] that is more expensive than abroad, I'm going to think 'Okay, why?' It doesn't make sense."

– A private consumer & collector of local design products

"You seldom find here in our market a person or a firm that sells these things with good international specifications and at reasonable prices."

– A private consumer & collector of local design products

Interestingly, we did not hear a call to action from our research participants to build a national trademark at this stage of the local design community and industry. Our research showed that other co-requisites and pre-requisites, as presented in this section, need to be resolved first before being able to step up in trademark development, innovation, and investing in being globally sought-after.

Pricing levels and standards

Demand-side views:

"[If] I am buying something that is locally made, mass produced [...] that is more expensive than abroad, I'm going to think 'Okay, why?' It doesn't make sense." – A private consumer & collector of local design products

"So, I wouldn't expect the same prices that I would get in international designers, or well-known designers." – A buyer of local design products

"I think that the consumer is challenging [...]. The consumer here is very price-sensitive, so [they] will sacrifice quality for [...] price. Nobody wants to [...] pay the price of production with execution." – A private consumer & collector of local design products

Supply-side views:

"[T]hey [consumers] don't trust those [designers] who ask for the proper price they want, they just go like okay I know that other person who can do it for way less than you." – A start-up graphic designer

"You seldom find here in our market a person or a firm that sells these things with good international specifications and at reasonable prices." – An emerging interior designer

"People want you, a lot of them, you cannot help all of them, now you can go insane with the price, just because you have demand, but what is the justified price?" – An established architect

"[...] personally I really don't know how to price my own designs." – An established architect

"I think we need to create standards of how you price yourself, I mean... what [do] you do?" – A start-up graphic designer

Perceptions towards local pricing gave way to important debate between supply- and demand-side participants. Distrust was a common area of concern. Equally, there was a general view that there is insufficient awareness and education of how to price and how much quality and specs actually do cost. Buyers and clients consistently complained about overpricing in Saudi-made products and services. As such, pricing is also a major point of contention, miscommunication, and mismanagement of expectations.

Local designers spoke about the barriers to effective cost management due to overpricing across their supply chains. Insufficient infrastructure and lack of

"You see beautiful designs, and then it's just [...] shabby, the way it's put together. And that [...] annoys me because, obviously, there is talent there, but it [...] goes back to [...] production capabilities."

– A private consumer of local design products

"For me, for example, quality of work, the quality that you're looking for is not necessarily a quality you have access to. So sometimes you have to create that quality yourself."

– An emerging interior designer

"You lack access to materials, that's the problem."

– A private consumer & collector of local design products

resources currently force designers to charge high prices for their work. These surcharges are then passed onto clients in the final shelf price, while also driving buyers away from local design and into international markets in search for lower, and perceived to be fairer, prices.

While higher taxes on customs and imports of materials and products do incentivize a localization of cost structures, the market still needs to respond with standardizing and reasonable pricing of local alternatives.

The COVID-19 pandemic saw significant price spikes in material and suppliers due to lack of availability. Given supply was more easily accessible for larger projects, smaller design projects especially felt this pressure point.

Profitability and sustainability emerged as major pressure points, especially for younger designers that do not yet have brand equity and established points of sales with a loyal client base. Finding the right balance between price, willingness to pay, and establishing a critical mass of demand remain obstacles to developing the local design industry in KSA.

Some designers called for standardizing pricing methods and levels to help address this major business-building hurdle. What we also found interesting was the limited dialogue between both the supply- and demand-side on how to bring fairness and optimization to local pricing. We found that the market has yet to reach its equilibrium point, where the supply-side can price based on their costs and profit needs, while meeting the willingness to pay of the demand-side.

Quality

Demand-side views:

"You see beautiful designs, and then it's just [...] shabby, the way it's put together. And that [...] annoys me because, obviously, there is talent there, but it [...] goes back to [...] production capabilities." – A private consumer of local design products

"It really comes down to how much they've invested into the quality of their product." – A private consumer of local design products

"I think that [...] when you want to buy a piece of quality, you cannot find it because the general consumer is not willing to pay the price." – A private consumer & collector of local design products

"Some designers do [...] two seasons, some [...] skip a season, some [...] will release in a year then release after... two years. There is no consistency, and I think that comes down to infrastructure, funding, support, [...] inspiration, [...] education..." – A private consumer of local design products

Supply-side views:

"The products of the factories are rarely right. We get tired in the Saudi factories." – An established jewelry designer

"For me, for example, quality of work, the quality that you're looking for is not necessarily a quality you have access to. So sometimes you have to create that quality yourself." – An emerging interior designer

"[...] the issue is trust. People do not have trust [...] we do not have standards like outside and they do not have evidence [certifications] so... trust." – A product design student

Quality was a recurrent theme throughout our research, from design and craft, to supply chain management, to pricing, to packaging, to delivery and to customer service. Buyers and clients during our demand-side FGDs put much weight on quality, saying that they would also become loyal to local designers that deliver quality.

There was an interesting intersection between debates on pricing and quality. Some buyers called out the very price sensitive nature of consumers in KSA, empathizing with local designers who must work against a mentality of high-quality demand but low willingness to pay. Some also argued that they consistently find the quality of local products to be generally lower than that of other countries. They discussed their challenges in receiving consistent quality when ordering mass production volume of the same product.

Interestingly, local designers shared similar struggles with quality on a day-to-day basis. Many explained that quality control challenges make it hard to manufacture profitably, sustainably, and dependably in the Kingdom. The limitations on designers to experiment and prototype their design concepts and products was also recognized as a contributing factor to quality control challenges. Some explained that quality is sometimes a push-out factor that drives designers to explore manufacturing facilities in other countries. With a lack of regulatory support to help quality management, local designers find themselves having to keep production numbers low to run inspections themselves and build-in their own quality control levels with little supply chain support.

Concerns about trust also came up during our FGDs with designers in KSA, with some explaining that the lack of a common trusted standard for design makes it difficult to manage and demonstrate quality control. We also saw an awareness that without trust, designers will struggle to sell, grow their market, and help bolster KSA as a dependable, internationally recognized quality standard.

Designers also explained that the lack of access to sufficient resources makes it difficult to maintain consistent manufacturing, production, and delivery schedules for their clients. This can also affect the seasonal supply of local design products, creating pent-up demand for clients and buyers who are then faced with interruptions in supply of local design they

desire. This is also an indication that the market size of local design is structurally constrained, with much room for growth.

Similarly, to the obstacles to fair pricing, we found little dialogue between both supply- and demand-side on the challenges each side of the market faces when it comes to quality.

Resources

Demand-side views:

"[...] you don't have that infrastructure." – A private & corporate consumer of local design products

"You lack access to materials, that's the problem." – A private consumer & collector of local design products

"Implementation needs resources and funding." – A private & corporate consumer of local design products

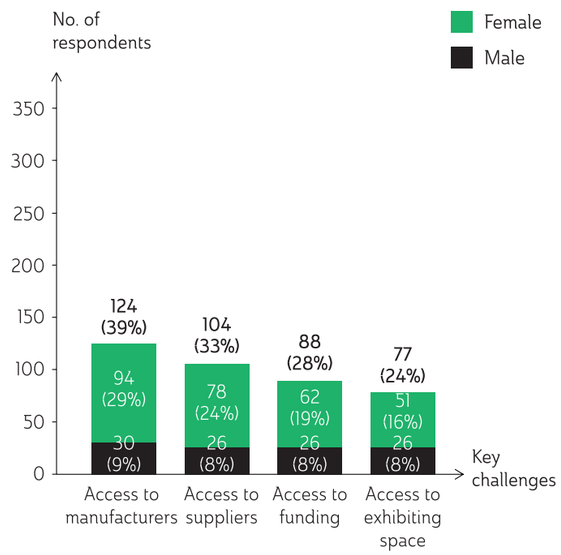
Supply-side views:

"I feel that it's a hard thing to do since there isn't any sponsor who can give us support." – A start-up fashion designer

"Also one of the things that the designers encounter is the difficult access to the resources such as the materials we need, like the stones, diamonds, and so on. You seldom find here in our market a person or a firm that sells these things with good international specifications and at reasonable prices." – An established jewelry designer

"I feel that we should be more informed about [the] market... the labor market, in terms of knowing how to reach the factories." – A start-up fashion designer

Exhibit 11:
Resource challenges facing supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they face the challenge / challenges presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

"I feel that we should be more informed about [the] market... the labor market, in terms of knowing how to reach the factories."

– A start-up fashion designer

Lack of resources and access to the few resources available were also serious challenges shared by both demand- and supply-side participants in our research. Patrons of local design shared their concerns about the lack of infrastructure afforded to support designers in building their capacities, means, and edge. Many pointed to the advantages of producing abroad, explaining that designers in other countries can more easily build competitive edge. The designers who participated in our research also highlighted how other countries have easier access to materials and facilities. The lack of resources in KSA has been a push-out factor for designers and could continue to drive designers towards other countries.

During COVID-19, the dependencies and overreliance on outsourcing abroad were especially felt across design fields. The pandemic intensified push-out tendencies as local access and supply worsened.

Buyers and patrons of local design described in our demand-side FGDs their challenges in finding or accessing Saudi designers in the local market. While the lack of an industry directory was identified in our research, electronic platforms have begun to respond to this challenge by collating contact information on designers. Consumers of local design also brought up the limited talent pool of trained sales and customer service professionals. They explained that this creates frustrations in the consumer experience when buying local design.

Designers spoke about resource-related challenges, which primarily fell into five categories: financial, technological, supply chains-based, logistical, and brand-based barriers. We learned that financial challenges include limited access to investors, funding opportunities, grants, competitions with prize awards, and bank loans suitable for freelancers and small businesses. As seen in *Exhibit 11: Resource challenges facing supply-side survey respondents*, over 25% of designers who responded to our survey said they face funding challenges. When debating technological barriers, designers highlighted the access challenges and weak financial capacity to invest in facilitating tools and programs. They explained that many of these technologies are extremely complicated and expensive. Technological barriers were not presented by our survey respondents, possibly due to the more strategic macro nature of our survey questions.

Interestingly, our survey respondents focused on the challenges they are facing with local supply chains. Almost 40% of respondents highlighted the challenge of accessing manufacturers. Over 30% also said they face challenges in accessing suppliers. This was heavily skewed towards female respondents, who represented over 75% of this pool. This gender skew was quite present, despite the over-representation of female respondents in our total survey respondents. Some designers in supply-side focus groups added that they often face a lack of professionalism amongst local suppliers and manufacturers with specs being changed or quality and price controls not being

"I can see many talented designers coming up, and they don't have the opportunity to show their designs..."

– A collector of & investor in local design products

followed as contractually requested. Others also said they lack a local supply chain directory to understand where to go and who exists in the market to manufacturing and package their design products and creations.

Importantly, the lack of access to material and local suppliers makes it harder for designers to invest in experimenting and prototyping their products. Additionally, local exhibition space was identified as a challenge by almost 25% of our survey respondents. We also learned in our FGDs with designers that there is a lack of creative spaces for designers to develop and thrive. Some also added that regulations yet to account for design-specific industrial zoning.

Logistical challenges raised in our FGDs were mainly related to the cost and difficulties of shipping products into KSA. Import and export fees can also make it prohibitive for some designers to effectively reach international consumers. Furthermore, safely, effectively, and affordably packaging items for shipment is itself a challenge that designers explained they face regularly. Finally, designers in KSA explained that to survive, they must be highly adaptive to the market, a responsive skill which requires access to solutions and a way out of a set-back in the design, production, and delivery process.

Interestingly, we learned that some designers find themselves obliged to sacrifice on the individuality and personality of their brands, a possibly ruinous decision in an industry that puts significant weight on brand originality and value-add.

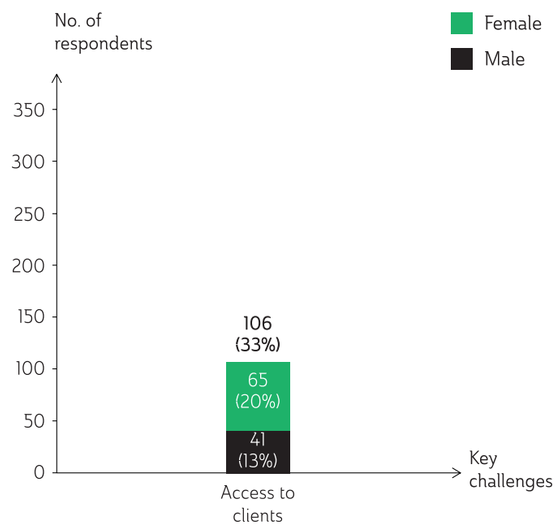
Sales & marketing

Demand-side views:

"I can see many talented designers coming up, and they don't have the opportunity to show their designs..." – A collector of & investor in local design products

Exhibit 12:

Client access challenges facing supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they face the challenge / challenges presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

"[...] I think advertisement, like self-advertisement is sometimes a bit hard, like it depends on whom you know, if you know important people they could help you bloom."

– A start-up graphic designer

Supply-side views:

"The customers no, they don't exist, [it's] difficult." – A start-up graphic designer

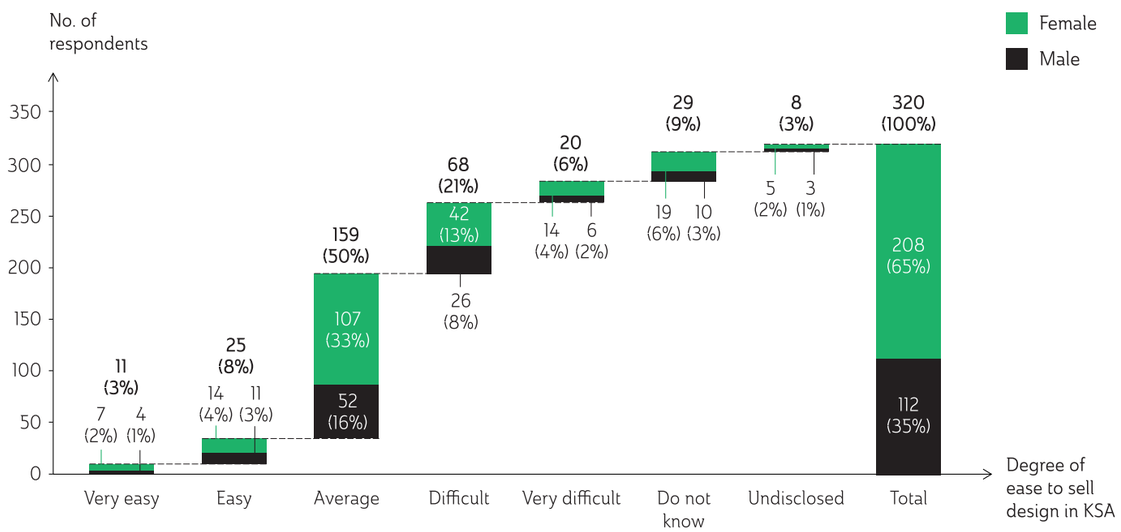
"As a starter, [...] you are nothing, you have just started so... it is very difficult to solicit people." – A start-up graphic designer

"[...] I think advertisement, like self-advertisement is sometimes a bit hard, like it depends on whom you know, if you know important people they could help you bloom." – A start-up graphic designer

"[I]f you will not facilitate the way for selling my designs, then where will I sell? Shall I keep them at home? So, if you don't give me a license easily and you don't give me a place for selling, where can I sell [my products]? If I am just [going to] market it, how can I do so if it is forbidden for me to sell it from home. [....] There are restrictions." – An established jewelry designer

Exhibit 13:

Ease of selling design experienced by supply-side survey respondents



Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

> **"If you give them quality, if you teach them how to do what they are doing in a better quality, everybody would buy it in their homes, but they buy [...] for charity now."**
>
> – A private consumer of local design products

Designers we spoke to consistently pointed out major challenges in marketing and connecting with clients in KSA. Both start-up designers and designers advanced in their careers explained that it can be extremely difficult to manage the logistical necessities of opening a business and marketing their work to their target clients. *Exhibit 12: Client access challenges facing supply-side survey respondents* shows that 33% of participating designers struggle to reach clients, noting that the gender skew is likely due to the over-representation of women in our total survey respondents.

Some designers explained that the need to have strong social capital, and that both access to the market and personal connections are indispensable resources and major barriers to doing business. Some designers also explained that they are facing limitations in regulations and licensing, needing more government support to better understand the requirements for shop owners, designers, and freelancers. We especially found that freelancers are not always included in regulatory and policy innovation, with room to ensure stronger coherence and facilitation in licensing and permits. Some designers added that they felt ill-equipped to navigate bureaucratic processes and do not feel they are receiving enough support. While the regulatory infrastructure in KSA continues to be strengthened, our FGDs highlighted that more support is needed to help designers stay compliant with new policies and frameworks. It was also emphasized that designers need to be supported to facilitate the ease of doing business in the Kingdom.

Designers explained that while platforms such as galleries, showings, and conventions to meet consumers are vital, there are too few for a community that wishes to grow with more agility. Interestingly, as seen in *Exhibit 13: Ease of selling design experienced by supply-side survey respondents,* 50% of our respondents found the difficulties to sell in KSA average with another 11% classifying the ease of selling as either easy or very easy. However, our survey taught us that 27% found it difficult or very difficult, an indication of possible inclusivity and equity challenges facing some local designers. Almost 10% of our respondents were not in a position to present their opinion on how challenging their sales experiences have been in KSA to date, possibly due to lack of a point of comparison with other markets or environments.

Furthermore, both buyers and designers explained that media coverage and strategic exposure to help build awareness about local design and the industry is lacking and hindering supply and demand to connect more efficiently. It was also pointed out that the lack of media investment is also impeding global awareness of the local design industry and growth opportunities in KSA.

Limitations experienced by the demand-side

Our FGDs with our demand-side participants identified a unique challenge facing clients and buyers in KSA.

Buying for charity

Demand-side views:

"If you give them quality, if you teach them how to do what they are doing in a better quality, everybody would buy it in their homes, but they buy [...] for charity now." – A private consumer of local design products

"There is no space for, for treating design as charity." – A private consumer of local design products

A recurring impression in some of our FGDs with buyers and patrons of design was the sense that clients of local design are treated as donors rather than consumers. Some spoke about the expectation that they would buy local design to be charitable or support a designer, but that the choice to purchase a local design would not be because the product was fairly priced or of good quality. This demonstrates that local design is not yet a demand-driven market.

Heritage preservation

Demand-side views:

"I think there is [...] a time issue where you have a lot of the traditional crafts that are disappearing because [its] expert practitioners [...] are passing away, and the younger generation... There is like a big gap [...]." – A consumer, philanthropist, and business owner of local design products

> **"[...] the challenge is to enhance their [designers] ability to both be able produce, and also have access to the culture [...] and archive the actual history of their people."**
>
> – A corporate consumer of local design products

"[...] the challenge is to enhance their [designers] ability to both be able produce, and also have access to the culture [...] and archive the actual history of their people." – A corporate consumer of local design products

Importantly, some of the buyers, collectors, and patrons of local design raised their concerns about preserving the heritage of craft and design in KSA. They shared their worry that time is running out to properly document the legacy high standards of local craft as a generation of artisans and craftsmanship is beginning to die out. During the tougher months of the COVID-19 pandemic, traditional artisans and craftspeople were especially affected given many did not participate in a nation-wide digitalization wave.

Our commitment to deeply listening

Our participating buyers and designers took ownership of our two research missions, and offered very honest and constructive market critiques. Buyers, collectors, and patrons opened up to debating their desires and frustrations with local design. Designers uninhibitedly shared courageous self-assessments of their design careers. As such, our research sessions became a platform for strong solidarity-building as designers began to realize that they are part of a community that faces similar challenges and obstacles to growth. As Adhlal, we took on the responsibility of carefully listening to these self-reported challenges, appreciating that it sets the stage for constructive and strategic opportunities to strengthen local design.

KEY OPPORTUNITIES TO ACTIVATE DESIGN AS AN INDUSTRY IN KSA

What is needed for local design to flourish in KSA?

By deeply listening to the diverse voices of the local design community, the high-potential socio-economic investment case for design in the Kingdom of Saudi Arabia (KSA) is clear. Our research taught us that the opportunities are significant, but the longer we wait, the heavier the opportunity cost shall be on buyers and designers alike.

Our proposed national definition for local design demonstrates that investing in local design is indispensable. The challenges facing local design serve as key starting points to understand how to nurture and grow the community and industry. As such, this *Key opportunities to activate local design as an industry in KSA* section presents high priority and actionable policy recommendations.

This concluding section begins with the same themes found in our analytical sections titled *The first national co-definition of design in the Kingdom of Saudi Arabia and Key challenges for local design in KSA*. We also introduce further policy, investment, and socio-economic development themes that emerged in our several strategic analysis workshops, additional consultative sessions, and market experiences. As such, we present our first industry report with a determined call for community-led decision-making, agile innovation, and an open space for boundless creativity and meaningful impact.

National and local public stakeholders have an urgent responsibility to deploy public funding, adopt regulations, invest in infrastructure, and enable other facilitations for local design with excitement and no delay. Buyers and collectors of local design have a critical role to play in championing local design and its potential by helping bridge the gap between supply and demand. This includes encouraging corporate policies and personal buying practices to buy local design. Investors and patrons have a timely stage to embrace as our unique data presents the return-on-investment potential of developing the local design industry, through mentorship, funding, sponsorship, client access facilitation, and awareness-building.

Our local design data repertoire makes clear that mentors can play a crucial role in technically and personally developing local designers and local supply chains. Academia, research centers, and exploratory labs are instrumental to furthering local content development by publishing research and serving as unique spaces to prototype, prove concept, and innovate.

Saudi-based suppliers, manufacturers, packagers, logistics providers, and all other key industry services have an unprecedented opportunity to grow as dependable and quality local supply chains, with much space to strengthen their practices, policies, competencies, and capacities. By collaboratively investing in local design together, local designers can be set up for sustainable success. Local designers will be able to empower each other and step up as high integrity, ethical, and authentic creators and innovators of a national "Made in Saudi" trademark that bears significant merit. International designers will also have a new home waiting for them.

Together, we can pivot and unleash the local design industry as a vital contributor to the socio-economic growth and sustainability of the Kingdom.

As such, this section presents a blueprint of policy, investment, enablement opportunities, and next steps, all of which can help realize Vision 2030 and the new National Investment Strategy through concrete contributions from local design:

1. Setting the national definition for local design
2. Embarking in national strategic planning
3. Furthering standards for a national trademark
4. Fostering a competitive & efficient marketplace
5. Introducing industrial clusters for design
6. Investing in local supply chain development
7. Building a transparent, information-empowered industry
8. Prioritizing sustainability in industry development
9. Designing for inclusivity & parity
10. Promoting authenticity & diversity
11. Guaranteeing ethics & integrity
12. Inviting cultural diplomacy & international collaborations
13. Raising public awareness
14. Elevating design education & learning journeys
15. Facilitating mentorship & local content
16. Enabling design careers
17. Facilitating access to funding
18. Exhibiting designers for equitable access
19. Building designer networks
20. Documenting local design heritage
21. Investing in research & development

Market development & growth

1. Setting the national definition for local design

What definition for local design can bring us all together?

Our research missions are a testbed and opportunity to launch public consultative sessions with the local design community to set the first official national definition for design in KSA. This definition is the starting point to determine a broader industry-wide strategy. Importantly, this definition sets the tone for what constitutes design in KSA today. However, as importantly, the more we invest and champion local design, the more it will evolve. It will be key to iterate on this definition over time and ensure it continues to effectively represent the evolution of the community and industry.

2. Embarking in national strategic planning

What national strategy can best champion local design?

Our research findings highlight the potential for a serious socio-economic investment case and exponential impact multiplier effect. It is important to explore the investment case for local design in KSA across our ten identified design fields of architecture; electronic gaming design; fashion design; graphic

design; industrial design; installation design; interior design; jewelry design; landscape design; and product design. This will include examining the natural and competitive advantages of each field and how they can contribute to Vision 2030, GDP, and global cultural diplomacy. We are in a special opportunity to commence this exercise as KSA and the world begin a hopeful recovery from COVID-19. The learnings and opportunities that we have amassed from this challenging period are deeply relevant for industry planning and market sustainability. We believe that any design strategy should be done together with the local design community to ensure grassroots ownership, stress-tested feasibility, and agility in gearing up and partnership with local design stakeholders. Clearly, championing local design will require brilliant design.

3. Furthering standards for a national trademark

What parameters for excellence can enable "Made in KSA"?

To build a strong and sustainable foundation for the local design industry, it is critical to define, streamline, and reinforce standards of excellence. Our research particularly highlighted the challenges in quality, procurement, contract management, and pricing in the local offering. Integrating these standards with ethics-led protocols and codes of conduct is important to assure coherence in local design. Introducing innovation in design standards will necessitate elevating the local design community with capacity-building tools and opportunities, assuring that designers are set up for success. Building in and implementing high standards and exemplary practices in local design will also elevate the competitiveness of the supply-side and instill further trust and motivation to buy from the demand-side. Also importantly, enabling standards is critical to incubating a national "Made in KSA" trademark that can build brand equity and become a recognized regional and global destination for design.

4. Fostering a competitive & efficient marketplace

How can local design become a competitive & sought-after industry?

Building a new industry in KSA is a special opportunity to support efforts and initiatives to ease doing business in KSA. This especially includes efforts to address barriers to accessing clients and sales and help optimize the meeting point between supply and demand. This was clearly highlighted in our survey of supply-side participants. *Exhibit 14: Access to clients as a key ask for support from supply-side survey respondents* shows that 40% of respondents defined client access as a key success factor. By building in efficiency, both designers and buyers will also benefit from fairer pricing as supply and demand meet more efficiently.

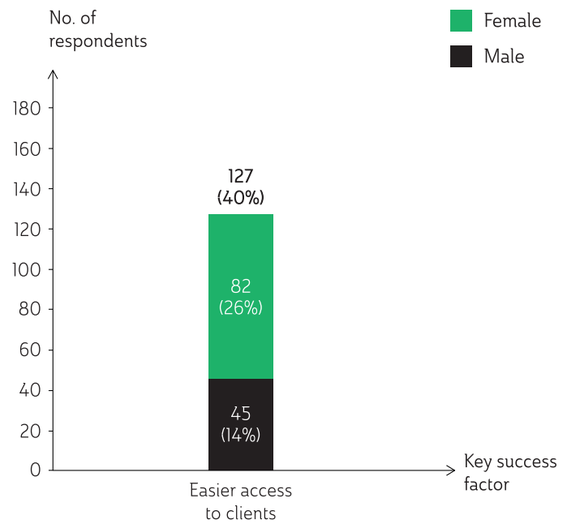
Local design can be positioned for long-term industry growth by introducing regulations and policies that minimize unnecessary hurdles and challenges to business and market growth. This would also reduce barriers to entry and increase quality of competition in the market. It is critical to bring innovation and ease of doing business to imports and exports so that designers may both import in any materials and equipment required, as well as export their products and services.

Due to the many COVID-19 challenges faced by designers, a mindset to shift out of over-reliance and dependency on outsourcing much of manufacturing, production, and packaging has emerged. The general community mood to not re-experience the limitations brought on by COVID-19 are a gateway for both a fresh perspective and a reset. The more efficient the market, the more we can achieve the participation and inclusion of diverse players and stakeholders. All this is key to achieving critical market size as the industry moves from nascency to maturity.

Our research also showed an emerging trend in KSA of clients and buyers gaining stronger interest in exploring local design. *Exhibit 15: Key trends of increased market interest and higher client engagement identified by supply-side survey respondents* shows that 56% of designers in our survey recognize that interest in local design is increasing in KSA. Furthermore, 30% of respondents find that their clients are becoming more engaged. These indicators are important to continue to monitor to also ensure that the local design industry sustainably evolves as a demand-led marketplace.

Importantly, it will be key to manage government facilitation and assistance to not build dependencies on government interventions. Rather, the private sector, as well as civil society and academia need to be given the space to take leadership in market definition and growth.

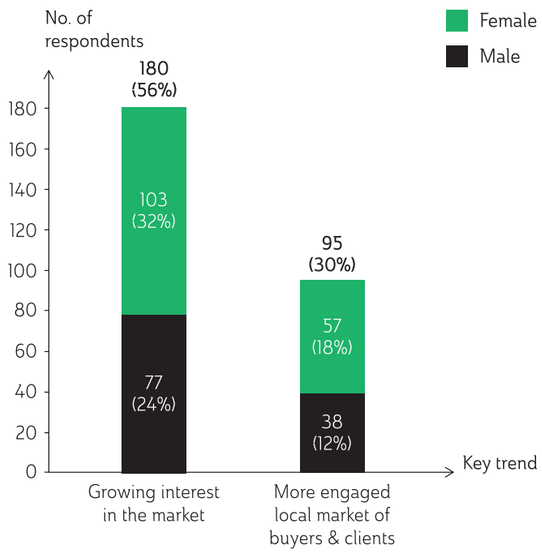
Exhibit 14:
Access to clients as a key ask for support from supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they experience the key success factor / factors presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP

Exhibit 15:
Key trend: Increased market interest and higher client engagement identified by supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they see the emerging trend / trends presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

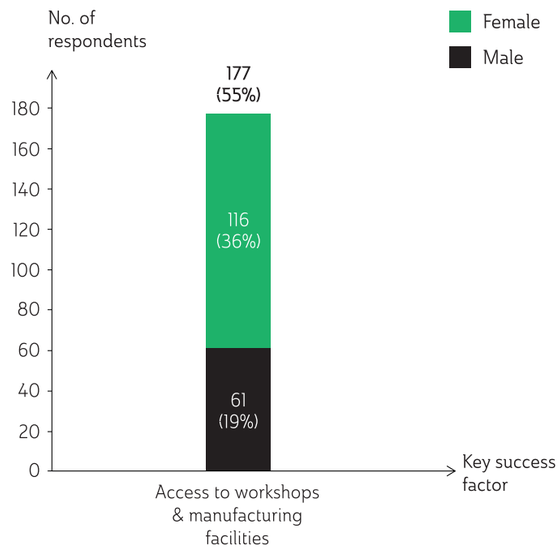
5. Introducing industrial clusters for design

Where can dedicated zones for design bolster the industry?

Designing clusters and organized ecosystems for design will help promote circular economic activity. It will also help ease doing business with facilitated access to resources, logistics, and suppliers. This was especially highlighted in our survey, where 55% of survey respondents explained that access to workshops and manufacturing plants was critical to their success, as seen in *Exhibit 16: Access to workshops & facilities as key success factors for supply-side survey respondents*. These efficiencies can also help reduce the cost of doing business, which will also allow designers to pass on economic advantages to their clients. This includes enabling more competitive pricing, as well as creating dependable supply of design products and services in demand. It will drive market efficiency and strengthen the quality of competition in the marketplace. Prototyping and scaling specialized zones is opportune. Well-designed clusters and ecosystems, with motivations inspired and enforced by special regulations and the quality of doing business, will be instrumental to inviting in tenants across the value chains of each design field.

Additionally, exploring avenues for municipal permits that allow studios and workshops to open in residential-heavy areas is important for designers to gain market access with closer proximity to their clients.

Exhibit 16:
Access to workshops & facilities as key success factors for supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they experience the key success factor / factors presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

6. Investing in local supply chain development

Where can supply chains be localized & encouraged?

It is time-critical to capitalize on the mindset shift we are seeing in the local design community as designers speak out about the importance of not re-living COVID-19 challenges that deeply troubled their careers and put their projects at risk. Calls for building self-sufficiency, reducing over-reliance and dependencies on suppliers abroad, and better facilitating imports and exports are key to activate. The opportunity to also excite suppliers abroad to enter KSA by facilitating ease of doing business is timely so that any local supply chain development is built on international expertise.

Indicative evidence of a potentially large market size for the local design industry is a welcoming opportunity for local suppliers, entrepreneurs, specialists, and investors to explore how to participate in the different layers of the design value chain. Beyond manufacturing facilities, workshops, and factories, there is ample space for legal, copywriting, printing, packaging, import and export services, and other specialized offerings. Elevating local businesses to serve as quality, ethical, and dependable partners to designers is also key. Regulations, capacity-building, and dedicated zoning will help stakeholders find each other more easily.

Furthermore, localizing cost structures will help standardize and stabilize market prices in local material and services for designers, as well as points of sales for clients. Localization incentives can encourage the design community to take risk, innovate, and lead new solutions for the industry. Incubating local supply chains will broker tangible economic value for KSA with measurable contributions to GDP, not only thanks to job creation but also because of the benefits on profitability. The more localized the value chain, the stronger "Made in KSA" can be.

7. Building a transparent, information-empowered industry

How can transparency & information access enable local design?

To encourage healthy market fundamentals and long-term development, it is important to continue to introduce regulations and policies that promote transparency and ensure equitable access to information. It is timely to introduce a public repository of open-source documentation to serve as a reference for standardized pricing, rates, and commissions. This will help further transparency and allow designers, suppliers, and clients alike to vet prices and financial proposals for commissioned projects.

We especially recommend consolidating digital information assets. Information, like other enabling resources, should not be an exclusive resource available to only those with privileged access. Published information should also be made available in multiple languages for designers of all nationalities. Digitalizing regulations, licenses, and policies needed for designers to be compliant with the law and good practices is vital and a powerful capacity-building opportunity. This will also be important for taxes, customs, imports, and exports. COVID-19 also taught us that digitalization alone will leave some behind, given not all members of the local design community might understand how to capitalize on available online resources, especially those in rural areas and older generations of artisans and craftspeople. Strategically enabling inclusivity through information power is also timely.

8. Prioritizing sustainability in industry development

How can sustainability be integrated into local design?

A key global trend in design is the strategic integration of sustainability into various design fields and steps of the creative journey. Sustainability touches all aspects of the product development process, from feasibility analysis to procurement of materials and equipment; from supplier selection to contract performance management; from prototyping to manufacturing; from quality control to sales strategies; and from packaging to delivery to market. While regulatory frameworks and policies can help encourage sustainability, compliance will require mindset development, capacity-building, and access to resources and suppliers that can meet sustainability standards. As such, advancing the local design industry with sustainability as a priority will promote key intersections between impact and growth.

9. Designing for inclusivity

How can local design be inclusive & participatory?

The local design community and nascent industry in KSA is predominantly young and female. These demographics ought to clearly inform any policies, regulations, facilitations, socio-economic initiatives, and funding frameworks. The learnings of COVID-19 on female designers, especially young mothers, should not be forgotten. Employers have an important role to play in providing ancillary services, such as daycares, so that all members of society can build meaningful careers in local design. Without directly and intentionally targeting young and female designers, the local design industry will not be optimized and set for success.

As importantly, these local design stakeholders need to be meaningfully engaged; their voices and views need to be part of key decision-making governance mechanisms. It is critical that they not be tokenized at high-level consultative participation only. An intentionally inclusive strategy is necessary to ensure that industry-building grows the market to a critical size that is not limited to the few.

10. Promoting authenticity & diversity

How can local design embrace & evolve in full authenticity & plurality?

For local design to develop into a grounded, unique, and sustained national industry, fostering authenticity and encouraging plurality are key. Our collected data from both buyers and designers emphasize the importance of authenticity and uniqueness in both purchasing habits and the potential to grow a design identity and career. Creating space for authentic design can also be supported by regulations and project parameters for designers. Introducing due diligence and vetting into public and private bidding will help validate that commissioned designers are those with an early or proven track record that is creative and unique, catching copycats and infringements of intellectual property early in the project cycle.

Importantly, authenticity does not have one face or style. Enabling a culture and policy framework for diversity in design will be instrumental to allowing design to reach and create value for different users and audiences. Both authenticity and diversity are cornerstones to exploring and promoting new community, social, and cultural identities, while furthering cultural diplomacy and social returns on investments.

11. Guaranteeing ethics & integrity

Where can values & human rights drive local design?

In our proposed definition of local design, we posited that "Design is a responsible and mindful community and industry." For local design to build both national and global distinction, trust, and credibility, grounding this early industry in values-driven regulations and practices is opportune. To ensure values are holistically integrated, designers will need to be trained and enabled to understand and monitor their material sourcing and local supply chain choices. Designers must also be supported in developing a cognizant mindset that recognizes the potential negative impacts of their designs on the environment and society. Regulated and recommended codes of conduct and practices are timely to develop as local content to further the industry.

As buyers become younger and more conscious, designers can stand out in their products and services by demonstrating their values-centric work. By educating buyers on the importance of ethics and integrity, the demand for local design will also help motivate, push, and reward designers that do their part well beyond basic brand marketing. Our research also highlighted the importance of building stronger intellectual property rights frameworks for designers to both safeguard and promote their uniquely owned designs.

12. Inviting cultural diplomacy & international collaborations

What national assets can be created through diplomacy & partnerships?

Enabling local design with policy, strategy, and capacity can also help elevate designers on the international stage. Cultural diplomacy can begin with knowledge sharing and capacity-building partnerships, and then grow into collaborations in competitions and awards, co-designing and co-innovating, as well as co-developing intellectual property in the public interest. Creating a stage for creativity and open curiosity will serve as a welcome mat for international partnerships with global expertise, businesses, and institutes to come into KSA and co-invest in advancing the industry. As such, over time, cultural diplomacy and global partnerships will be a powerful means to elevate national competitiveness and brand equity for local designers and "Made in Saudi" national trademarking.

Learning & career development

13. Raising public awareness

How does design affect our daily lives?

We learned that design is a boundless industry and contribution to culture, economy, government, and households. Our proposed national definition for local design, informed by our community-centered research brings this to light: "It touches all aspects of life, economy, and country." To build an effective launching pad for local design to thrive, we need to begin with public awareness and education campaigns. These campaigns will need to be measured with mindset shifting key performance indicators to measure the increase in public cognizant levels towards the many attributes of design. It is our hope that dialogue and debates on this national definition draft can help inform these campaigns to engage our society at-large. This will importantly elevate positive social perceptions towards designers and design careers.

14. Elevating design education & learning journeys

How can we strengthen skills & competencies in local design?

Learning journeys throughout the academic and professional careers of designers are key to support their competitiveness in local and international markets. This was a critical finding in our survey, as seen in *Exhibit 16: Access to education as a key ask for support from supply-side survey respondents*, where 53% of local designers who participated said education access is an imperative to furthering their design careers in KSA.

Local designers strongly emphasized learning and development as a core factor for success, as seen in *Exhibit 18: Education & knowledge as key success factors for supply-side survey respondents*, with 45% who said more vocational training can further their careers and 43% who said seeking further education opportunities is critical to their professional performance.

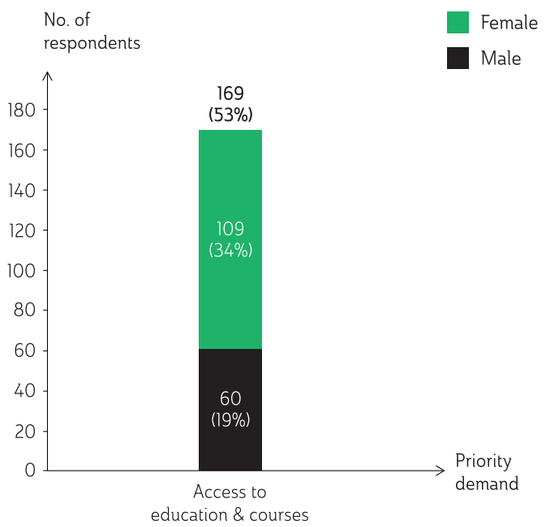
Universities, vocational training institutes, research labs, and think tanks must be supported and facilitated to build-in local design history, ethics, quality control, governance, innovation, operations and management, sales, and financial sustainability into their design

curricula and programs. Multi-disciplinary courses in business management, sociology, and communications should be encouraged to equip design students with the tools they need to thrive after graduation. Encouraging apprenticeships, internships, and graduate corporate programs across design fields in collaboration with the private sector is timely and enriching.

Integrating the direct feedback and lived experiences of students and graduates into the design of curricula is critical to assuring agency and meaningful inclusion. However, importantly, design education needs to be supported beyond the classroom to also ensure vocational academies, labs, and think tanks are engaged and enabled to elevate the skills, competencies, and capacities of the local design community and industry.

The opportunities to engage with global experts and pedigree institutions could also help nurture cultural diplomacy and design collaborations.

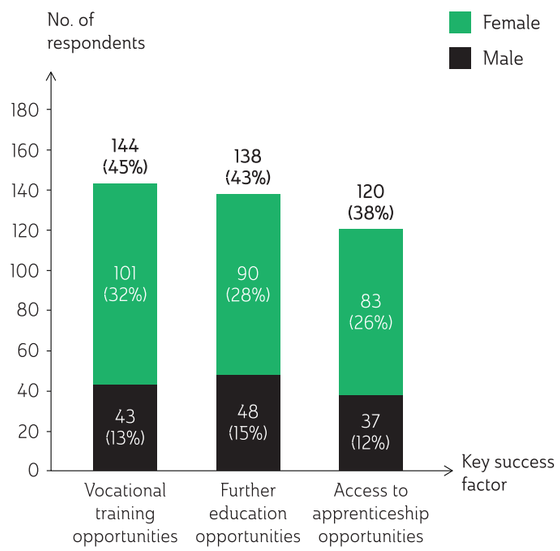
Exhibit 17:
Access to education as a key ask for support from supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they need the priority demand / demands presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 18:
Education & knowledge as key success factors for supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they experience the key success factor / factors presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

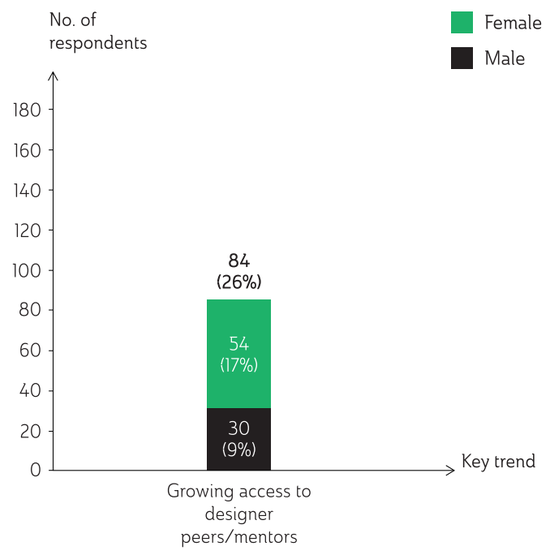
15. Facilitating mentorship & local content

How can mentors unleash talent in design?

Our research clearly highlighted the priority need for mentors. Of our total survey respondents, 26% said they are finding it easier to access mentors and peers, as seen in *Exhibit 19: Key trend: Access to peers and mentors is growing according to supply-side survey respondents*. However, *Exhibit 20: Need for access to mentors for supply-side survey respondents* shows us that 36% of survey respondents still need access to mentors to strengthen their designs and careers. Mentorship is a long-term need that transforms as design careers evolve. While we continue to welcome international mentors to support local design, it is also paramount that local experts be encouraged to play a grounded role in strengthening authenticity and leveraging local market know-how. Mentors are a unique opportunity to share rich local content and experiences in the form of success stories, role models, and case studies to help further the personal and professional potential of their mentees. It is also opportune to help document, digitalize, and build open-source databases with local cases in point for designers to tap into.

COVID-19 became a mentorship stage for some, as traditional artisans decided to digitalize and gain online access to younger designers to be of help in their careers and projects. This opening up and inclusion has been enriching for designers and should be encouraged for the long-term.

Exhibit 19:
Key trend: Access to peers and mentors is growing according to supply-side survey respondents



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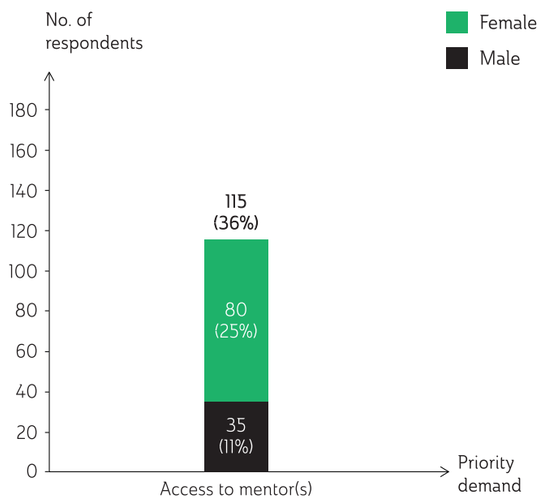
Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 20:
Need for access to mentors for supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they need the priority demand / demands presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

16. Enabling design careers

Why is design an exciting, impactful career in KSA?

Designers must not fall victim to the lack of purposeful careers and available jobs in design. Our national labor market needs to properly accommodate Saudi designers, especially mindful of the unique demographics of the community. This requires an integrated policy development approach that includes the direct leadership and participation of universities, and associated research labs and think tanks. Importantly, universities and graduated students should join forces to strengthen curricula on design and help bridge the gap between the classroom and the workforce. Tied with public awareness programs, labor market public and private constituents have a key role to play in elevating design careers to build positive social recognition and respect.

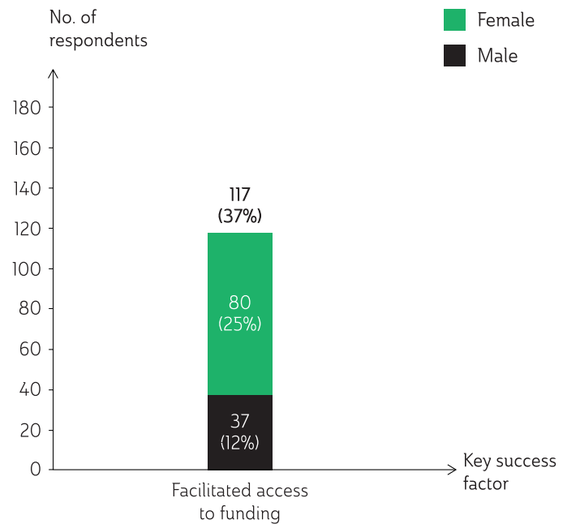
17. Facilitating access to funding

How can equitable funding drive local design?

Elevating and enabling designers requires providing access to innovative financing products and services. *Exhibit 21: Access to funding as a key success factor for supply-side survey respondents* shows that 37% of survey respondents view funding as critical to their success. It is opportune for the banking industry to explore designer freelancers, SMEs, and larger businesses as a new client base and help drive liquidity and funding equitability in the market. Important will also be to capacity-build designers and users of any financial instrument on how to manage their obligations and stay compliant with terms and conditions.

Increasing investor awareness of the investment potential of local design is also paramount. Facilitating access between designers and investors can help initiate a local deal flow of design industry ventures and operations. *Exhibit 22: Need for access to funding and investors for supply-side survey respondents* also shows that 27% of survey respondents need funding facilitated for them, and another 19% are seeking investors. It is opportune for angel investors and patrons of design to support early designers at the start of their careers and designers looking to scale and grow. Such sponsors of design will also have important roles to play in mentoring, capacity-building, and facilitating market access for their invested designers and ventures.

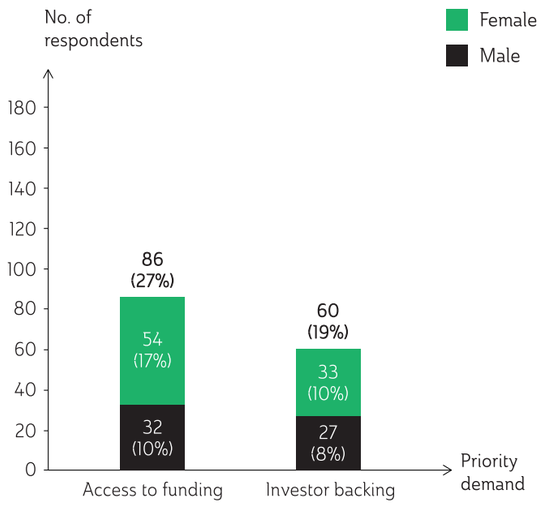
Exhibit 21:
Access to funding as a key success factor for supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they experience the key success factor / factors presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 22:
Need for access to funding and investors for supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they need the priority demand / demands presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

18. Exhibiting designers for equitable access

How can exhibitions better connect our design community?

Designers rely heavily on showcasing their products and services to develop their businesses, boost sales, access clients and local supply chains, and explore their home market. The lack of sufficient events, access to exhibitions, and prohibitive pricing must be addressed through a diverse annual calendar of design-specific convenings.

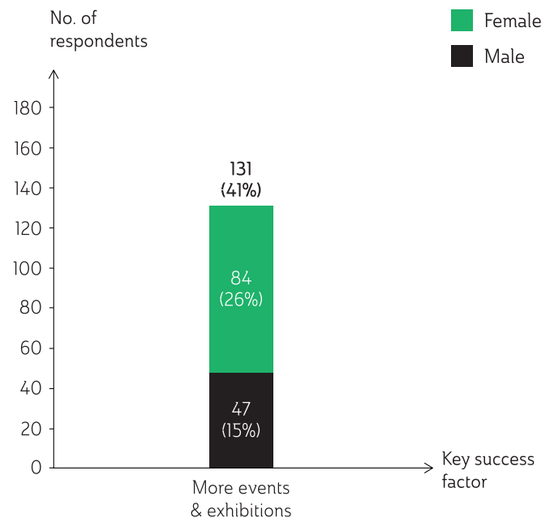
Many of these barriers are further exacerbated for designers who are easily overlooked by the market, especially young start-up designers and women. These are examples of community groups who also face information disempowerment challenges and might not be aware of an opportunity for their design portfolios and businesses. Government-sponsored advertising and marketing budgets could help exhibit and promote designers to the public.

41% of local designers highlighted in our survey that hosting more events and exhibitions is a prerequisite for success in the market, as seen in *Exhibit 23: Exhibition space as a key success factor for supply-side survey respondents*. Providing more exhibiting spaces can dramatically increase the market size and economic significance of local design in KSA. As seen in *Exhibit 24: Increasing exhibition spaces as a priority opportunity recommended by supply-side survey respondents*, was relevant for 41% of surveyed local designers.

Hosting contests, competitions, festivals, events, and sponsoring awards in design and specific design fields are collaborative opportunities for the private sector, academia, and civil society to come together and elevate local design and designers. Initiating public reward and recognition systems will invite further competition and help strengthen the brand equity of high potential designers.

All this will also strengthen the social and business networks of local designers and their clients, bringing supply and demand much closer together. It is important to note that there is room for innovation not only in hosting physical convenings, but also virtual exhibitions and points of sale. This was also a key learning from COVID-19 as the stakes went up against designers who were not digitally connected.

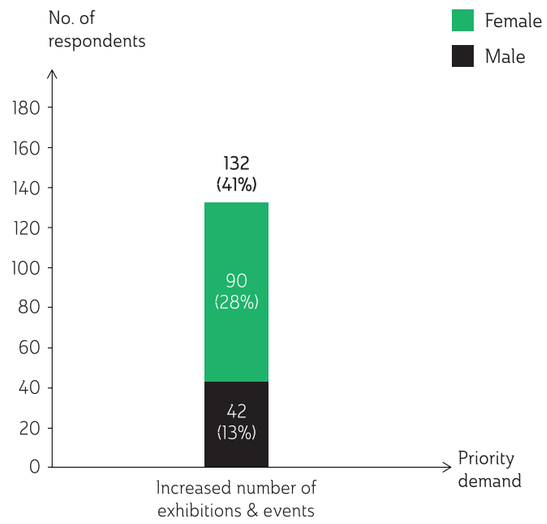
Exhibit 23:
Exhibition space as a key success factor for supply-side survey respondents



Note: Total percentages are based on n=320 eligible survey respondents; sub-total percentages splitting female versus male respondents are based on the number of respondents who answered they experience the key success factor / factors presented

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 24:
Increasing exhibition spaces as a priority opportunity recommended by supply-side survey respondents



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Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

19. Building designer networks

How can the design community be better connected?

To thrive, the local design community needs to strengthen its networked capacity and diversity. Designers must have facilitated access to each other, as well as local supply chains that are key enablers to design in KSA. One way to build community with agility is through technology. Since our research closed, community-led online directories for designers and suppliers have been launched as designers and service providers work to solve inefficiencies facing the local market. Networking and knowledge sharing digital platforms can help designers more easily cultivate connections with mentors and resources. With greater networks and stronger communication, the local design industry can gain greater efficiencies. The COVID-19 experience also teaches us how crucial it is to shift from a design community mindset of competition to one of collaboration.

Data

20. Documenting local design heritage

How can Saudi heritage inspire local design today?

Investing in local design public archives and inventory is key to both safeguarding heritage and creating unique local content for design inspiration and innovation. Local designers need repositories, historically accurate data, and an open-source online platform with equitable access. Working with legacy artisans and craftspeople, as well as cultural institutes and civil society is opportune to also spread public awareness and integrate access to design archives into education curricula and vocational training courses.

Documenting heritage can also set the basis for defining what qualifies versus does not qualify as heritage. While inventories for historical cultural assets continue to grow, especially investing in classifying and documenting heritage in design from the 1950s onwards is key. By documenting heritage across the many eras of our history, we can also pave the way for archiving new design trends in the making that will one day also be our heritage milestones.

21. Investing in research & development

Why does high quality data matter for local design?

To strategically build and grow the local design community and industry with agility, limited opportunity costs, innovation, and excellence, data is now paramount. It is opportune to invest in local data and research repositories. Doing so will ensure an evidence-centered approach to the governance, decision-making, vision, and future of the industry and its players. To make this happen, highly methodological and grounded research needs to be commissioned regularly. Data needs to become more accessible to the local design community so that designers can run their market studies and feasibility analysis for concept development and business planning. Quality and equitable research will also reduce the barriers to entry and engagement of local design stakeholders keen to participate in industry growth. What therefore is also required is capacity-building and supporting designers to understand how to capitalize on research and data banks being developed for the public good.

Looking forward

The opportunities for local design are significant. They are also interconnected and many are interdependent. The intersections between our recommendations also mean that addressing one can positively enable others. In many ways, these socio-economic investment recommendations require a systems-change effort so that a multiplier impact effect for local design can be unleashed.

Clearly, stakeholder collaboration and management will be crucial to the success of any industry development and transformation. But it will also be important to make sure that every stakeholder is positioned where they are best fit to serve. Government should play a regulatory, facilitating, and enabling role, but not become industry managers. The private sector should step up and take on the risks of investing in local design. The opportunities for local supply chain development, design businesses, and economic value creation are substantial. It will be a unique time to monitor measurable contributions to GDP as the industry gears up.

Civil society must also be given its space to play a meaningful role in advocating for local designers, ethics, inclusivity, and heritage. For academia, development of the local design industry will be an national laboratory for discovery, research, and publishing. Buyers will be key shapers of local design as the industry becomes more demand-led. Local designers will be leaders and ambassadors, creators and innovators, job builders and content developers of design in KSA. With the right empowerment, capacity, and stage, we are excited for local designers to lead the way.

As KSA and the world explore a hopeful COVID-19 recovery, we truly believe there could be no better time to commit to a new industry that can serve society, culture, economy, and government in truly valuable ways. As Adhlal, we are invigorated by the prospects for local design in the Kingdom, and are here to be your long-term partners

METHODOLOGY

Research design

Demand and supply: Both sides of the same coin

Adhlal commissioned The Zovighian Partnership to design and conduct two community-centered research missions to explore demand and supply in the local design industry in the Kingdom of Saudi Arabia (KSA).

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

The spirit of this methodological decision was to explore local design from an industry perspective, meaning there can be no supply without demand, and that their respective characteristics and dynamics cannot be separated from one another. Our understanding of the current state of design in KSA is therefore holistic and based on a strategic systems-thinking lens.

Industry report objectives

Our first local design industry report is dedicated to the design community in KSA. Its pages are a mediated stage of deep-listening, bringing together views and voices of demand-side and supply-side industry participants.

Our ambitions 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 desirable local design industry instituted in robust social-economic growth fundamentals.

This report builds upon our growing data repertoire, including the findings of our first and second white papers that examine the rationale and mindsets of buyers and patrons of local design in KSA.

Key research questions

Our demand-side research mission – defined as buyers, clients, collectors, and patrons of design in KSA – was designed based on the following research questions:

1. How does the demand-side perceive the design industry in KSA today, and how does it interact with the industry at large?
2. What are the challenges and opportunities facing clients, investors, and donors when engaging with local designers, manufacturers, and sales teams in the design industry today?
3. What does the local design industry need today in terms of support – regulatory, ecosystem infrastructure, capacity-building, financial, and other – to enable the industry to thrive and become a formally-recognized and key socio-economic contributor to the GDP of the Kingdom?

Our supply-side research mission – defined as designers of all nationalities and stages in their careers that are based in Saudi Arabia – was designed to address and answer the following research questions:

1. How do designers define design as an industry, and how do they characterize the local design industry in the Kingdom of Saudi Arabia?
2. What are the experiences, available resources and enablers, opportunities, and challenges of designers throughout their careers in the local ecosystem in KSA?
3. What approaches are local designers in KSA adopting to build their careers and businesses?
4. Is there a design community in KSA, and if so, how do designers identify with it, and how does it serve the local ecosystem?
5. How do designers perceive the design offering in the marketplace today and the long-term potential for an established design industry in KSA?

Adopting a qualitative and quantitative mixed methods research design

Due to the paucity of information on the design industry in KSA, an exploratory, deep listening qualitative approach was adopted to investigate both the demand- and supply-sides of the local design industry. 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 data.

Each FGD was designed to include four to eight participants, allowing for 90 minutes of rich and open discussions. FGD questions were meticulously and iteratively designed to answer our research questions. Experienced facilitators and notetakers were also rigorously custom-trained for this investigative effort.

To supplement the FGD data, short quantitative intake forms were also designed and supplied to our research participants at the start of each FGD, in an effort to capture more personal and demographic information.

An industry-wide survey was also designed and hosted to broaden our exploratory study of the supply-side, inviting Saudi-designers to answer a three-minute set of 17 questions online or in paper form.

Study limitations

Given the early-stage interest in studying and researching the local design industry in KSA, a principle limitation to our research was the lack of prior research and scientific assessments of the industry. As such, an exploratory research direction was adopted. Our first research mission exploring the demand-side recruited a limited number of respondents, serving as a testbed for future research inquiries. This limitation was addressed in our second research mission investigating the supply-side, which recruited respondents representing key design fields in the local market.

Given the very high number of female participants who opted into our two research missions, it is important to not immediately infer a gender skew in any survey statistics or qualitative insights. To manage this limitation and fairly represent our collected data, a gender analysis is only presented when there is a clear overwhelming challenge or opportunity specifically facing female designers in KSA.

There is also a strong skew towards young participants who opted into both of our research missions. This included two FGDs facilitated by two universities, for which we would like to extend our gratitude: Imam Abdulrahman Bin Faisal University and Alfaisal University. Given the objectives of our research and the nature of our participant recruitment approach, elderly artisans and adage craftspeople were not included in our research.

Our *Committing to further research* section of this *Methodology* section recommends opportunities to continue to invest in much-needed local research and literature on the local design industry, its dynamics, key market players, and emerging trends.

Data collection

Research participants

Our demand-side FGDs were designed for buyers, clients, and collectors, as well as donors, patrons, and mentors with both high liquidity and strong purchasing power. Participants were invited to self-identify as one or more of these market segments and specify the number of years they have served in such a capacity, with an overview provided in *Exhibit 25: Demand-side local design industry focus group discussions participation: Respondents by affiliation to local design and sex (2018).*

Participants were predominantly citizens of Saudi Arabia to gain authentic insights into local interests, while also capturing representation from expatriate buyers and collectors in the market, as seen in *Exhibit 26: Demand-side local design industry focus group discussions participation: Respondents by nationality and sex (2018).*

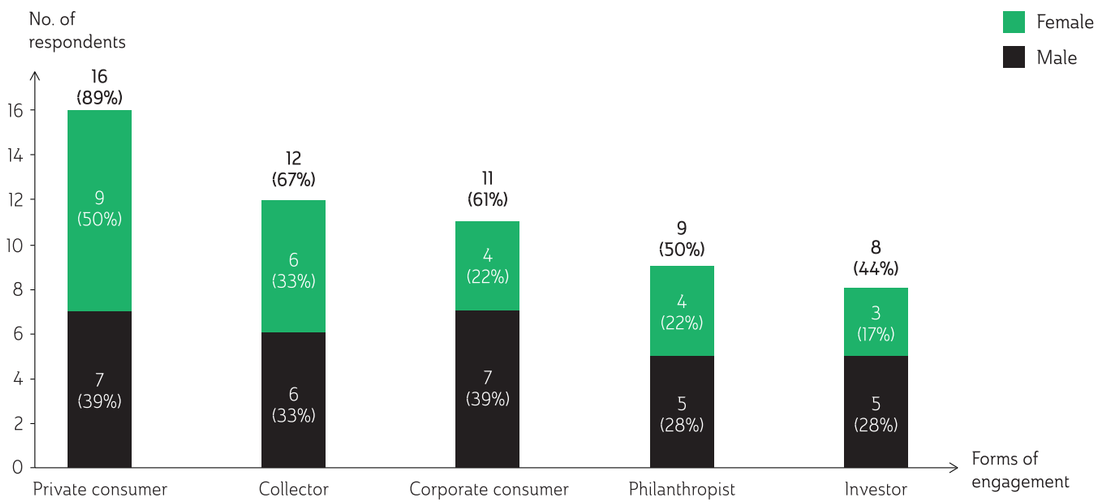
Each research respondent was selectively recruited by Nourah Alfaisal, as opposed to random sampling. This ensured a similar and calibrated level of expertise amongst all our research participants with a seasoned group of buyers and collectors, as presented in *Exhibit 27: Demand-side local design industry focus group discussions participation: Respondents by affiliation to local design and years of engaging with designers (2018).*

To explore the supply-side of the local design industry, designers from all nationalities and design disciplines were recruited to participate in a nation-wide survey during Saudi Design Week (2019). *Exhibit 28: Supply-side local design industry survey participation: Respondents by nationality and sex (2019)* presents an overview of the eligible participants who completed our survey. Survey respondents represented a wide age range, as shown in *Exhibit 29: Supply-side local design industry survey participation: Respondents by age group and sex (2019),* as well as a broad spectrum of different stages in careers, as seen in *Exhibit 30: Supply-side local design industry survey participation: Respondents by stage in career and sex (2019).*

Survey respondents who previously expressed their interest in our research endeavors were informed of our deep-dive FGDs, and those in specific design fields and career stages were invited to participate. A snowball sampling technique was adopted to help us identify our FGD participants, building upon the social capital of the local design community.

We hosted FGDs to deepen our supply-side exploratory efforts, recruiting designers from various nationalities based in KSA, as shown in *Exhibit 31: Supply-side local design industry focus group discussions participation: Respondents by nationality and sex (2019-2020)* design backgrounds, and stages in their careers as presented in *Exhibit 32: Supply-side local design industry focus group discussions participation: Respondents by stage in career and sex (2019-2020).* These FGDs were designed to host both a specific design field and stage in career per research session. This allowed discussions to be focused on a specific design discipline and address challenges and opportunities of respondents at a similar level of professional experience. These FGDs were intended to be very inclusive, capturing members of the local design community who are often those with the least agency and equitable access to resources and information, such as women, young designers, and students.

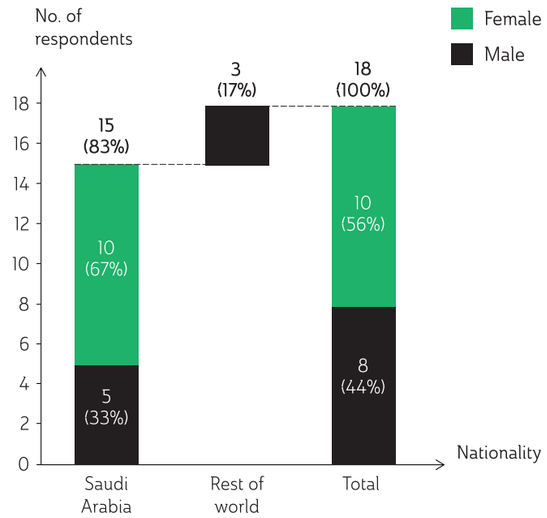
Exhibit 25:
Demand-side local design industry focus group discussions participation: Respondents by affiliation to local design and sex (2018)



Note: Respondents could choose more than one self-reported affiliation

Sources: Adhlal Research Mission No. 1 Demand-side local design industry focus group discussions (2018); ZP analysis

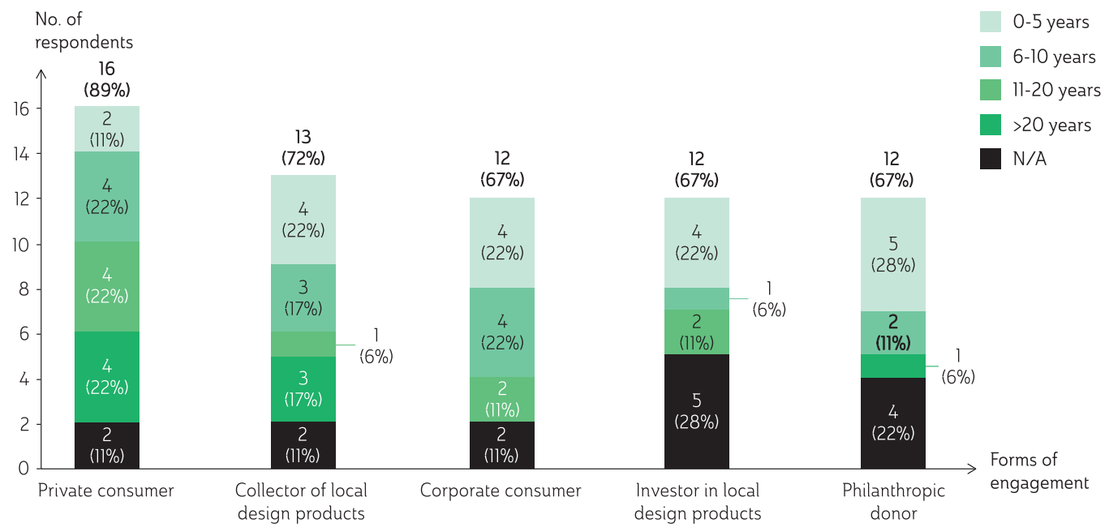
Exhibit 26:
Demand-side local design industry focus group discussions participation: Respondents by nationality and sex (2018)



Note: Respondents in supply-side focus group discussions included participants from supply-side survey

Sources: Adhlal Research Mission No. 1 Demand-side local design industry focus group discussions (2018); ZP analysis

Exhibit 27:
Demand-side local design industry focus group discussions participation: Respondents by affiliation to local design and years of engaging with designers (2018)

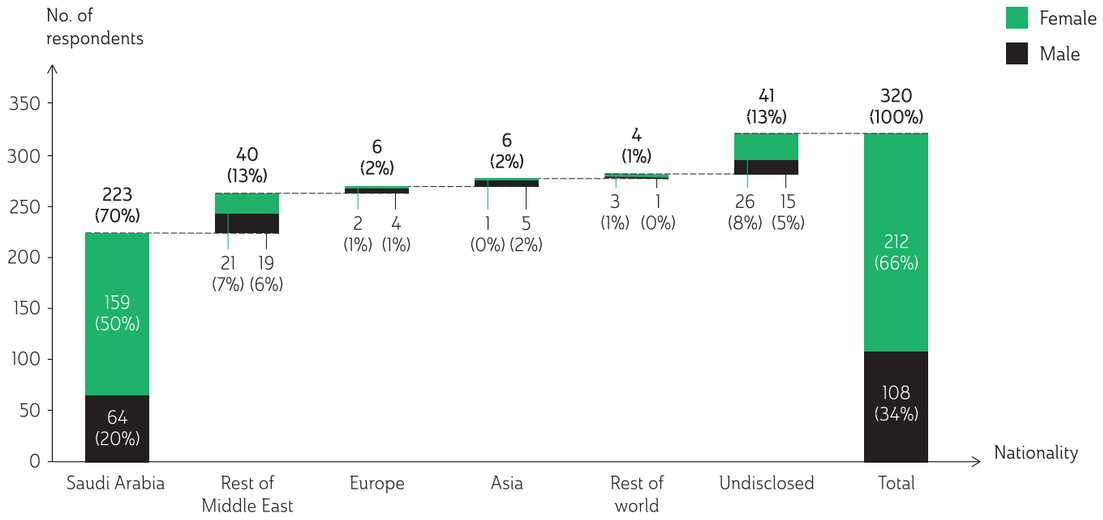


Note: Respondents could choose more than one self-reported affiliation

Sources: Adhlal Research Mission No. 1 Demand-side local design industry focus group discussions (2018); ZP analysis

Exhibit 28:

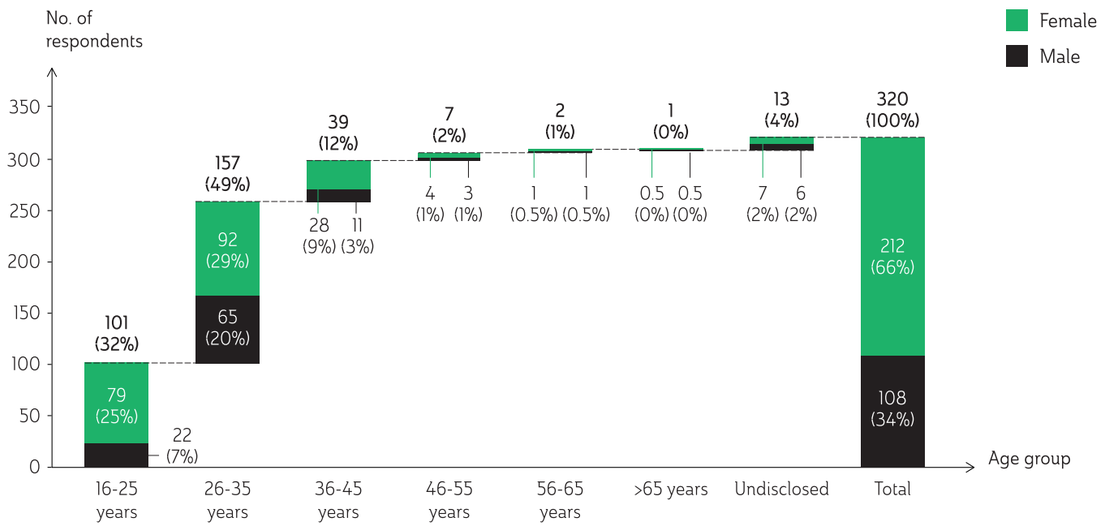
Supply-side local design industry survey participation: Respondents by nationality and sex (2019)



Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 29:

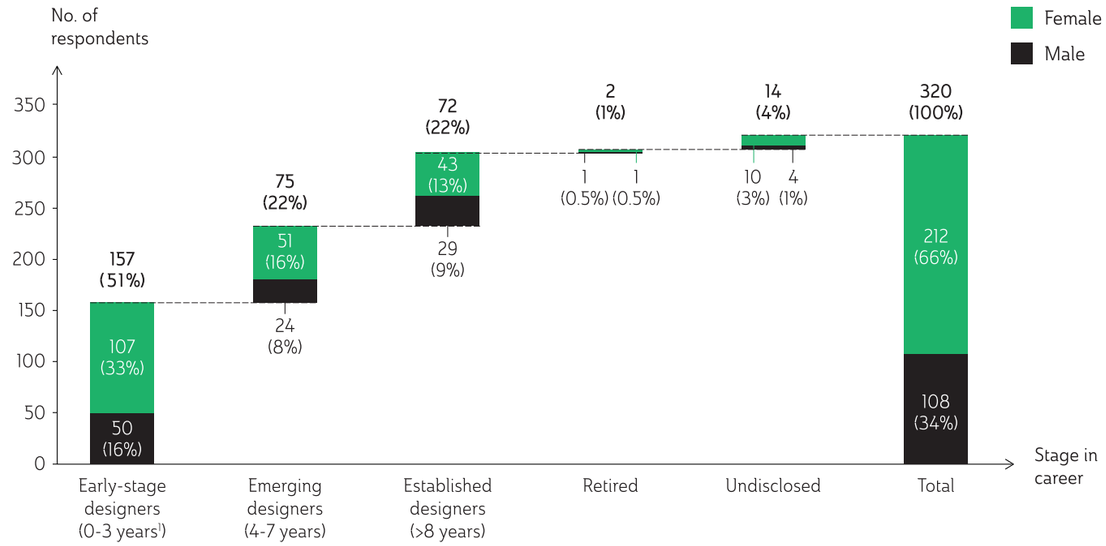
Supply-side local design industry survey participation: Respondents by age group and sex (2019)



Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 30:

Supply-side local design industry survey participation: Respondents by stage in career and sex (2019)

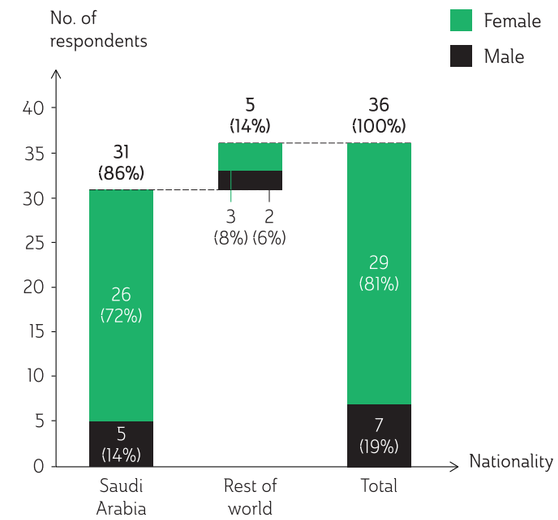


1. Early-stage designers include students who have worked and have been exposed to the design industry

Sources: Adhlal Research Mission No. 2 Supply-side local design industry survey (2019); ZP analysis

Exhibit 31:

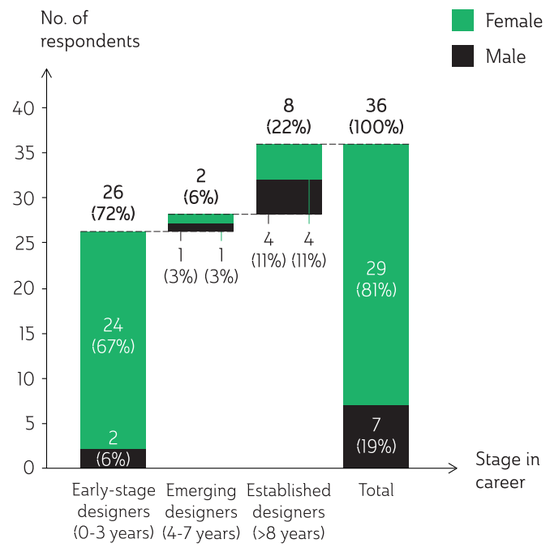
Supply-side local design industry focus group discussions participation: Respondents by nationality and sex (2019-2020)



Sources: Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions (2019-2020); ZP analysis

Exhibit 32:

Supply-side local design industry focus group discussions participation: Respondents by stage in career and sex (2019-2020)



Note: Respondents in supply-side focus group discussions included participants from supply-side survey

Sources: Adhlal Research Mission No. 2 Supply-side local design industry focus group discussions (2019-2020); ZP analysis

Our FGDs were designed to represent designers in KSA from seven design fields, each at a specific stage in their careers:

1. Early-stage graphic designers with 0-3 years' experience;
2. Emerging interior designers with 4-7 years' experience;
3. Established jewelry designers with 8 or more years' experience;
4. Established architects with 8 or more years' experience;
5. Early-stage fashion designers with 0-3 years' experience;
6. Students pursuing a bachelor's degree in product design; and
7. Students pursuing a bachelor's degree in architectural engineering.

We were very fortunate to have been able to canvas such a widely representative sample of designers. The breadth of fields that we were able to include illustrates the diverse and multi-faceted nature of the Saudi design industry. As such, despite some implicit skews in both gender and young age, the voluntary nature of participation and mechanisms to extract and analyze the data allows us to still comfortably acertain that there are leanings in both gender and youth in the local design community and industry in KSA.

Fieldwork

The FGDs of our demand-side research mission were conducted between October and November 2018 at the Adhlal offices in Riyadh, KSA. Our strict participation selection criteria allowed us to host and conduct three focus groups, with a total of 18 participants.

Surveys of our supply-side research mission were collected in November 2019 during Saudi Design Week in Riyadh, KSA. Our adopted opt-in participation method yielded a total of 352 surveys collected over five consecutive days by scouting and meeting designers on-site and inviting them to fill out the survey either online or in paper form. Respondents who could not fill out their survey on-site on the spot were given the option to do so later or take a QR code to access the survey online. Social media was used to help build awareness of the survey. Following data cleaning, 320 surveys were confirmed as complete and qualified, equivalent to an incidence rate of 91%.

Our supply-side FGDs were conducted between December 2019 at the Adhlal offices in Riyadh and February 2020 at Imam Abdulrahman Bin Faisal University in Al Khobar and Alfaisal University in Riyadh. Our participation selection criteria allowed us to host and conduct six focus groups and one consultative session, with a total of 36 participants.

The supply-side respondents pool totaled 344 unique qualified participants, with an overlap of 12 respondents who were recruited through the survey to participate in our FGDs.

Our research participant strategy allowed us to deeply include diverse voices, providing a space for strong and safe agency and self-determination. This also helped us hold our research design accountable.

Language

While our FGDs were conducted in the English language, the facilitator welcomed responses and participation in the language respondents were most comfortable speaking in, either English and / or Arabic, to maximize inclusivity. Similarly, all formal procedures of communication prior to and following data collection, including recruitment, consent forms, information briefs, as well as intake and outtake forms, were available in both languages.

Our survey respondents were asked to choose their language of preference – either Arabic or English – to fill out our supply-side survey, either physically or online.

Research ethics

Participation during data collection was completely voluntary. In line with strict ethical research standards, no financial incentive was offered to participate in any FGD or survey. All research participants were promised complete anonymity; therefore, our research results have been fully anonymized to respect the identity and privacy of all participants. Consent forms were signed by all participants, detailing a confidentiality agreement and permitting the research team to audio-record (if applicable) and anonymously quote data collected during research sessions. An informed consent note was also included at the start of our supply-side survey.

Data analysis

Data management & coding

All raw data retrieved from our FGDs were meticulously transcribed and / or translated, anonymized, and then coded following the Boyatzis thematic analysis method of qualitative analysis and open coding.

Following the development of a codebook and selective coding, our researchers extracted quotes that best represented group sentiments to inform key findings and initial themes. More extensive thematic analysis was conducted via axial coding and memoing for strategic implications. All data collected and coded was presented in a proprietary collected raw data compilation to facilitate strategic analysis.

Our collected survey data was diligently anonymized, data-cleaned, and stress-tested to identify any incomplete or non-eligible responses. Following data cleaning, eligible responses were analyzed, and a series of pivot analysis was performed to inform our primary key findings on designers in KSA.

Writing this industry report required a critical review of the findings posited by our demand- and supply side research respondents, ensuring that all collected data be carefully and objectively contextualized. Any biases, potential for misinformation, and ambiguous remarks were de-emphasized to ensure the integrity of our published findings and analysis.

Conducting a benchmarking literature review

Given our research efforts were directed towards an under-researched subject matter, it carried the ambiguities and limitations of any exploratory qualitative study similar in nature. It was also important to contextualize our fieldwork findings and compare them with international design trends and developments. To achieve this, a structured search of the existing body of literature was conducted across various data sources. Our search included, but was not limited to, peer-reviewed journals, academic databases, and governmental / non-governmental organizations. The key terms adopted in our search were "design and global benchmarking", "design sector", "design industry development", "creative industries", "creatives economies", "design industry innovation", "design industry infrastructure", and "design industry challenges". No date range was set in order to also explore global industry developments as well as trendlines and outlooks.

The search generated over 90 readings, which were thoroughly reviewed for potential inclusion. The inclusion criteria adopted included readings that provide a clear definition of design, explore the evolution, opportunities, and challenges facing the global design industry, and provide an international segmentation of various design fields and / or sectors. Our analysis of the selected readings resulted in an extensive coverage that consolidates and appraises the existing body of literature. This provided us with solid background to contextualize the co-definition of local design proposed by the design community in KSA.

Findings & insights

Strategy workshops were then conducted after each research mission with the Adhlal team, facilitated by The Zovighian Partnership. These workshops examined our final collected raw data compilation from a multi-stakeholder perspective to ensure that all analysis conducted would be inclusive in its design and not exclusive in its potential for impact. Given

fieldwork was conducted pre-COVID, the Adhlal team also closely monitored the impact of the COVID-19 pandemic on different design fields, stakeholder groups, and steps in the creative journey. Pandemic repercussions and opportunities are also included in this report.

The process of data analysis revealed the depth of insights and information garnered from each research mission. This allowed us to confirm that the data collected is valid, reliable, community-inclusive, industry-wide, and insightful. While our demand-side research was early-stage exploratory in its nature, our supply-side research was quite wide, representing many key market segments.

After publishing our first and second white papers exploring the demand-side insights of the local design industry, the Adhlal team, with the support of The Zovighian Partnership, is honored to publish this industry report to shed light on the many learnings acquired during each research journey. Uniquely, this industry report is research-led and methodologically detailed, in line with the evidence-centered vision of Adhlal.

Committing to further research

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 dedicated to investing in research and data. It is our aim to continually serve as a go-to knowledge repository and equip our community and policy makers with methodological evidence to advance the local design industry.

We have also identified priority research themes that we believe are imperative for the local design community industry, including, but not limited to:

- Benchmarking of design fields prioritized in countries with national design strategies;
- Consultative assessments of opportunities at the level of specific design fields, and not design as a whole;
- Gender parity analysis on salaries, project fees, and commissions for female versus male designers; and
- GDP contribution analysis of local design to the Kingdom.

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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.

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