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**Employment Statistics & Development
2022**

Konzepthaus Design Study (KDS)

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The goal of the KDS is to create the most comprehensive, empirical overview of mobility design departments. The results are aimed to support global OEMs and suppliers alike to prepare their departments for the challenges of the coming years.

Employment Statistics & Development

The annual KDS #1 focuses on the research field of „Employment Statistics & Development“ and is divided into four chapters – salary, gender, business operations and personal training. The data was collected via an anonymous online survey and can be regarded as representative and resilient, because 464 people participated. The focus of the survey and this report needs to be seen internationally, as people from 24 different countries took part. In the following, the key findings are highlighted and have been evaluated by the experts at KIC. The variations among respondents are reflected in the different results of the annual figures.

Facts & Figures



Average annual salary incl. bonus*

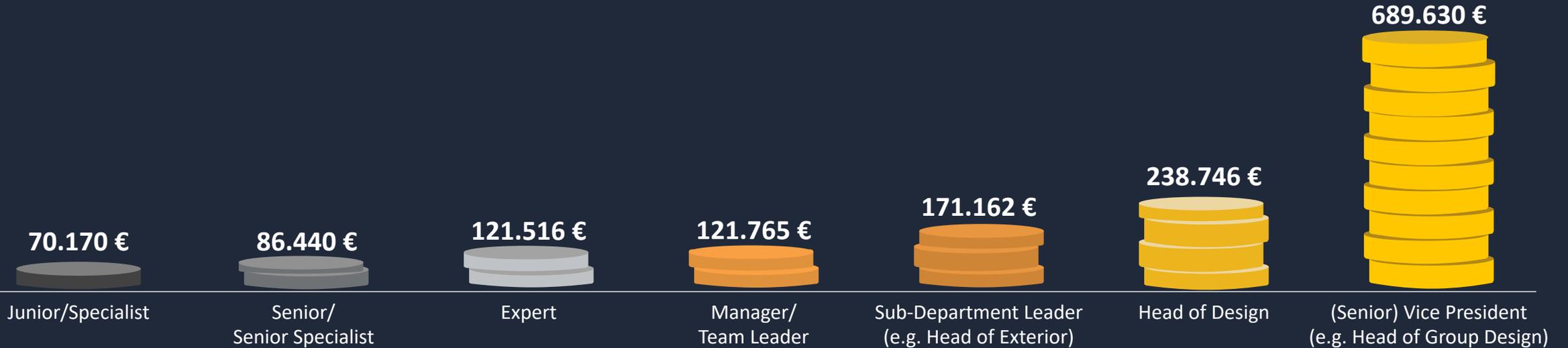
Question: „What is your maximum, achievable annual salary with bonus?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



Martin Groschwald

„The most encouraging directive I would like to mention here is that both the Expert roles and those with Manager/Team Leader responsibilities receive almost the same remuneration. It shows us that many OEMs understand that high-level specialists deserve the same credit and importance from a financial perspective within the department as their team-leading counterparts - a very positive development indeed!“

Average salary increase when reaching the next hiring level

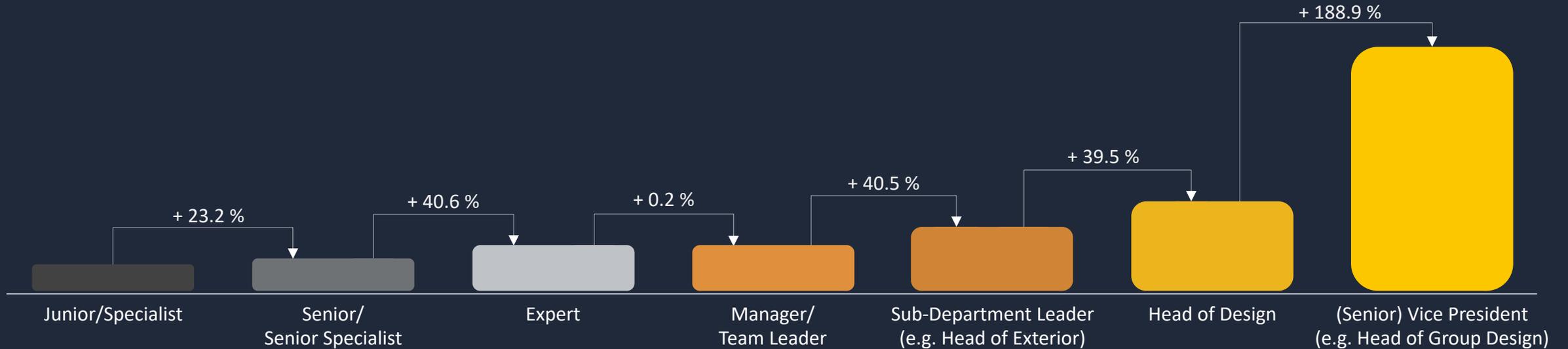
Question: „What is your maximum, achievable annual salary with bonus?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



Martin Groschwald

„It is important to mention that increases from one level to another do not come from one day to the next. Depending on structures within companies and departments, these increases are usually spread across smaller financial promotions, which we are not captured here in our data.“

Sector comparison - average annual salary incl. bonus*

Question: „What is your maximum, achievable annual salary with bonus?“

Design department

Full time employee and temporary employment

Automotive manufacturer, mobility manufacturer, automotive supplier

Worldwide



Martin Groschwald

„With the emergence of new players in the past years within the mobility sector (VTOLs etc.), it is great to see that the Design department is highly respected from a financial perspective. Mobility design employees can expect a slightly lower salary than their automotive counterparts.“

Average annual bonus (%) on basic salary

Question: „What is your maximum, achievable annual salary with bonus?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



Martin Groschwald

„Within top-level management, a bonus can vary based on the year’s performance, company results and many other influences. So we weren't surprised to see a variation compared to our 2021 study – especially during a pandemic. It is, however, good to see that there is an overall continuity on all other levels.“

Professional education

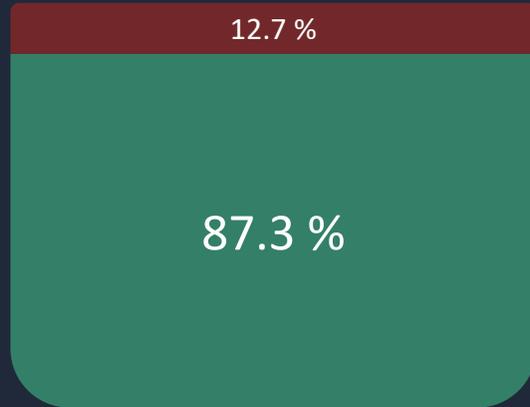
Question: „What was the focus of your professional education?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



Graduate

(e.g. Bachelor's)

Technical

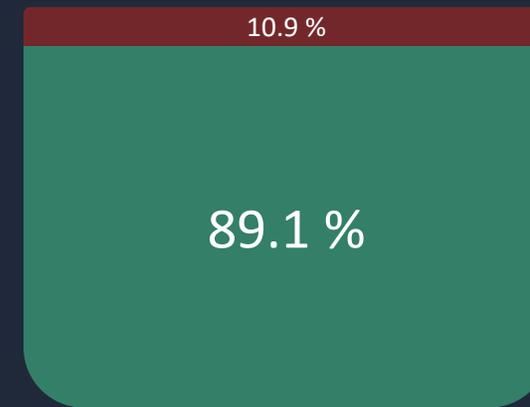
Education focus:

e.g. Automotive Engineering,
Electronics Engineering

Creative

Education focus:

e.g. CMF Design, Media Design,
Transportation Design, Product Design



Further degree

(e.g. Master's degree)



Martin Groschwald

„For us at KIC, this will be a very fascinating statistic to follow in the coming years. Currently, the design industry does not include of a wide range of educational backgrounds – it was also not required. With the presently observed changes within departments and the industry, it will be very interesting to see how this develops over the coming years. Will we see more MBAs in the design space? Can we expect a more technical focus to a degree? I'm looking forward to following this in future KDS editions?“

Salary comparison between car manufactures

Question: „When was your current employer founded?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide

Start up car manufacturers (founded after 2010) pay

17.2 %

higher salaries than established manufacturers



Oliver Vogt

„Since 2010 we have seen many companies joining the world of automotive manufacturing, and of course, this also came with an increase in hiring from „traditional“ OEMs. These companies not only attracted talent with the option of starting a brand from scratch but certainly also with financial incentives. However, we see that traditional OEMs are now attempting to close this salary gap – down from 20 % in 2021 to 17.2 % in 2022. The convergence of traditional OEMs illustrates that this development is necessary to remain competitive with younger companies in the contest for talent. A further progression will be interesting to monitor.“

Gender distribution

Question: „In which section of the design department are you currently working?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide

Gender distribution across all management levels



Florian Teufel

„Just under one in ten people working in automotive manufacturing, design departments are women. From our experience, we know that the main areas women work within are the colour, material & trim departments. In my view, this dynamic of overrepresentation of women in these departments and the underrepresentation in others is alarmingly high. Now, I want to kick off the discussion: Is this lack of diversity grounded in automotive manufacturers, product design, or the transportation design education system, and how can it change to address this imbalance?“

Gender salary gap

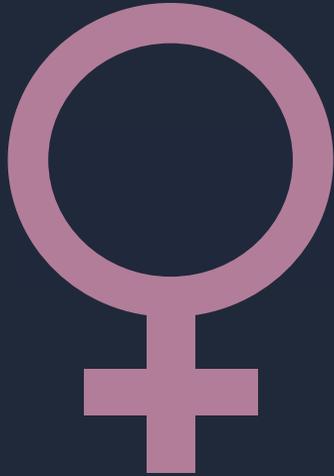
Question: „What is your maximum, achievable annual salary with bonus?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



The average salary of men is

+ **18.0 %**

higher than the salary of women



Florian Teufel

„The result from last year’s KDS regarding the salary gap between women and men is confirmed again this year. In our view, the basis for deriving this result remains the same:

There is a higher response rate from men in the collected data and thus a more robust data basis.

The average salary in the colour, material & trim department, where women mainly work, is lower than, for example, in exterior design. We also know that women tend to change jobs less often in the automotive manufacturing design industry, leading to fewer big moves in salary.“

Percentage of time spent on administrative vs creative work

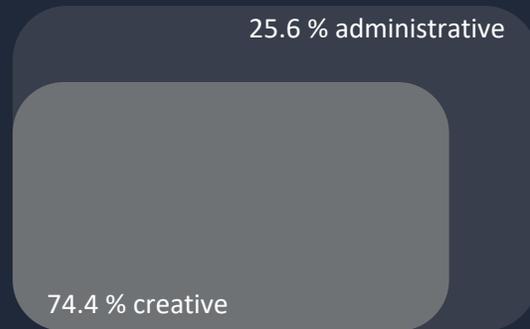
Question: „Please indicate how much of an average workday consists of administrative duties vs creative activities.“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



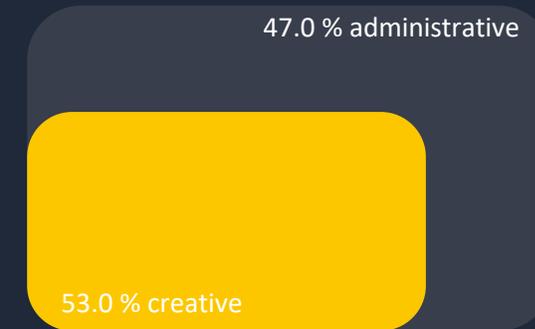
No leadership responsibility

(Junior/Specialist/
Senior/Senior Specialist/Expert)



Lower and middle management

(Manager/Team Leader/
Sub-Department Leader)



Top management

(Head of Design/
Vice President/Senior Vice President)



Oliver Vogt

„Compared to the results from our 2021 survey, we see that staff across all levels in design departments are working more on creative tasks, especially the top management level. Could last year’s Covid crisis be a reason for that, because many projects were hibernating – and are now becoming active again – and admin tasks were more important during Covid?

I am curious to hear what you think – write to me on LinkedIn!“

Focus of the design process within departments

Question: „In which area of the design process is the focus of your work?“

Design department

Full time employee and temporary employment

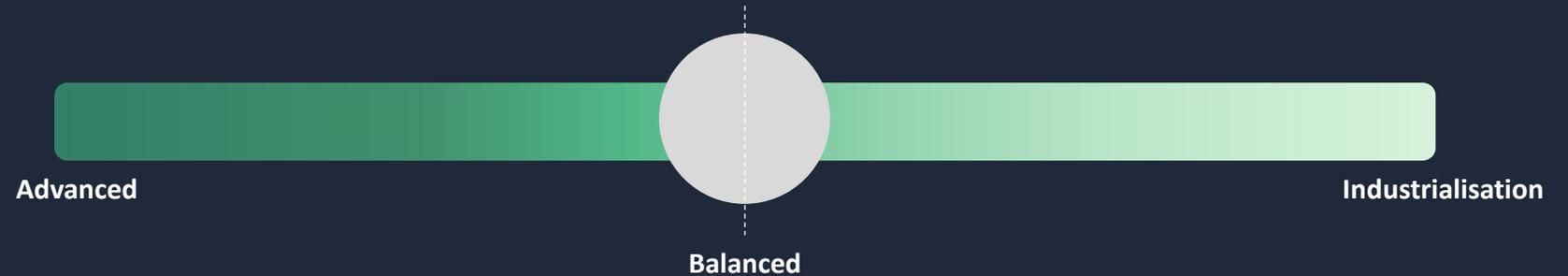
Automotive manufacturer

Worldwide

Focus area of the design process

Departments:

Brand Design, Colour & Trim Design, Design Operations, Design Strategy, Digital Modelling, Exterior Design, Interior Design, Management/Executive, Physical Modelling, Project Management, Studio Engineering, User Interface/User Experience, Visualisation



Oliver Vogt

„The result of this question is quite astonishing to me, considering that many smaller OEMs and suppliers do not have Advanced Design Teams, but half of our participants claim to work in this area. From our consulting experience, we usually see 15 % - 20 % of a design department working exclusively on Advanced Design. In addition, the question arises to what extent the understanding of Advanced Design and consequently, which areas are assigned to the advanced process.“

Reasons for changing jobs

Question: „What are the most important reasons for changing your job?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide

Most important reasons for changing jobs in the past



Most important reasons for considering a job change in the future



Robert Forrest

„From being the second most important reason in accepting their current role, „Promotion opportunities“ falls to sixth place for the next career move. In its place human factors such as „Work-life balance“ and „Working atmosphere“ gain significance, pointing to the importance for companies to nurture a tolerant and inclusive environment. This may also reflect changing personal circumstances.“

Workplace

Question: „How many days a week do you work from home and how many days would you like to work from home? What is the main reason for presence on site?“

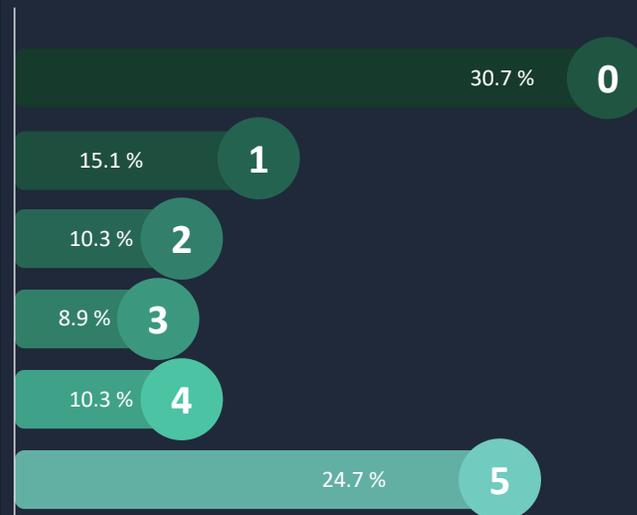
Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide

Number of days a week people work from home



Main reasons for not working from home



1

Collaborative work

e.g. team meetings, socialising

2

Equipment access

Use of site-specific tools

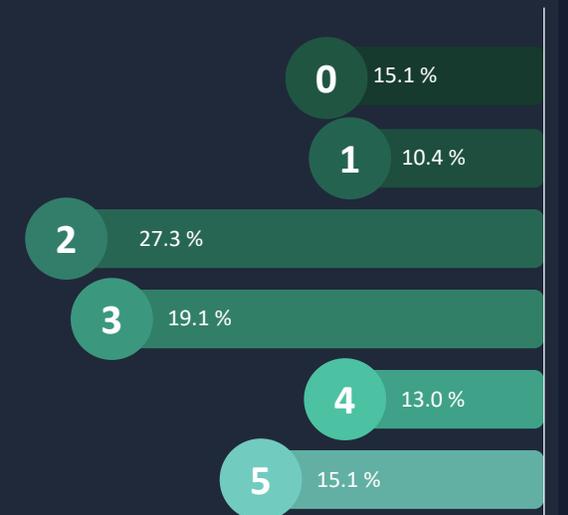
e.g. physical models

3

Concentration

Better focus on work

Number of days a week people wish to work from home



Moritz Hausel

„About one-third of respondents are working full-time in an office or design studio. We assume this would have been less in the last year given the effects of the pandemic. The remaining 70 % of employees seem to have great flexibility working anywhere from one to five days at home. Surprisingly, approximately one-quarter of respondents have fully remote roles! Considering the creative process and importance of direct exchange and collaboration, we are surprised by these results. Besides access to hardware, this assumption of the importance of cooperation presents itself as reasons designers choose to be present on site. How are design studios facilitating this critical aspect?“

There has also been little change from our 2021 survey in how often people „wish“ to work from home, with the majority opting for 2-3 days/week.“

Average annual training budget*

Question: „How much budget does your employer invest in you for personal training and development per year?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



Asaf Yaacobi

„OEMs have understood that to have the internal knowledge and the best personnel, they must invest internally in cultivating and nurturing the future of design and its leadership. Therefore, we see actual investment behind training for each step in management level, as training demands are increasingly more complex from design execution to management and leadership. Please note that there is insufficient data available at the highest management level to represent all levels.“

Annual available training days

Question: „How many training days do you have available for your personal training per year?“

Design department

Full time employee and temporary employment

Automotive manufacturer

Worldwide



Asaf Yaacobi

„More than half of our respondents do not receive training on the job. This result is curious and alarming at the same time. This leadership approach to training may certainly backfire when, in the future, they require special skills and have to outsource this through a team of expensive experts or that their talents simply migrate to OEMs with a more nurturing culture.“

Your KDS Team



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