

KIDS

Employment Statistics & Development

EURO REPORT

Konzepthaus Design Study

Konzepthaus Design Study (KDS)

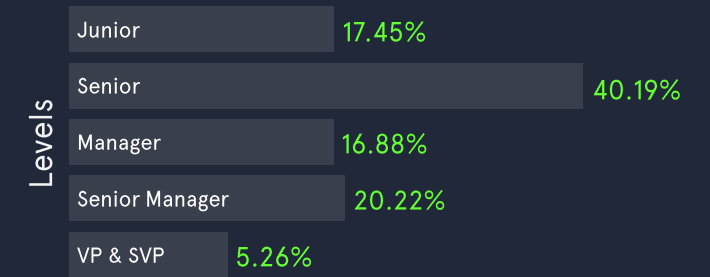
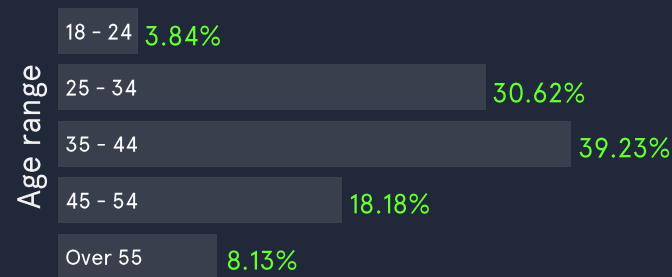
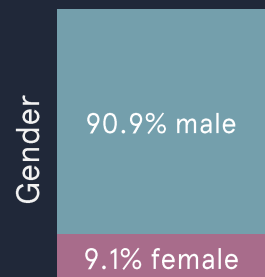
The goal of the KDS is to create the most comprehensive, empirical overview of mobility design departments. The results are aimed to support OEMs and suppliers alike to prepare their departments for the challenges of the coming years.

Employment Statistics & Development

The KDS #1 focuses on the research field of “Employment Statistics & Development” and is divided into four chapters – salary, gender, creative work and personal training. The data was collected in a two-week period via an anonymous online survey and can be regarded as representative and resilient, because more than 209 persons participated. In the following, 10 key findings are highlighted and have been evaluated by the experts at KIC. The focus of the report is on Europe.

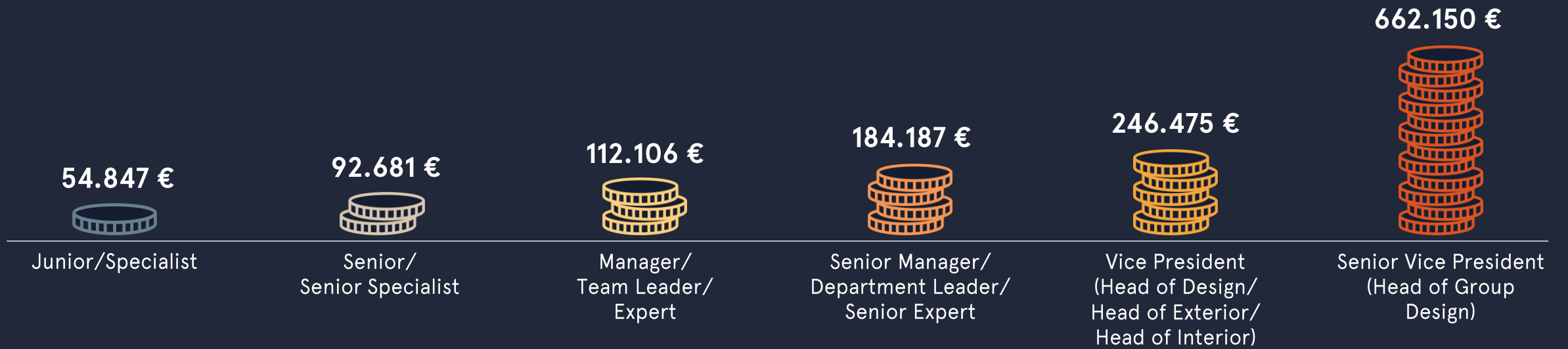
Facts & Figures

209
Participants



European average annual salary incl. bonus*

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer ☑ Working in Europe

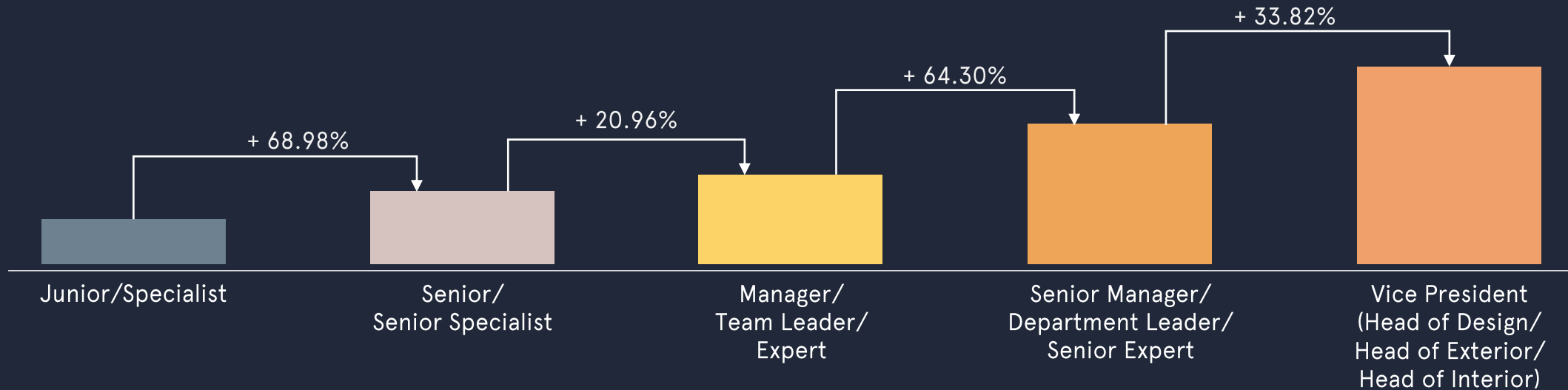


Martin Groschwald
(Managing Director)

„Salary comparison is always one of the most sought-after statistics for any employer and employee. Firstly, we see that working within mobility design is still a privilege and the salary is very high compared to the European-wide average salary of 23 600 € (EU statistics). Secondly, comparing salaries with the engineering equivalents (OEMs), we see that mobility design positions are remunerated slightly above their average. Last, but certainly not least, we are very happy to see that non-managerial positions (expert roles without leadership) are often remunerated at a very high level as well. These functions are required, as much as managerial positions to deliver a high-level product.“

Average salary increase when reaching the next hiring level

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer ☑ Working in Europe

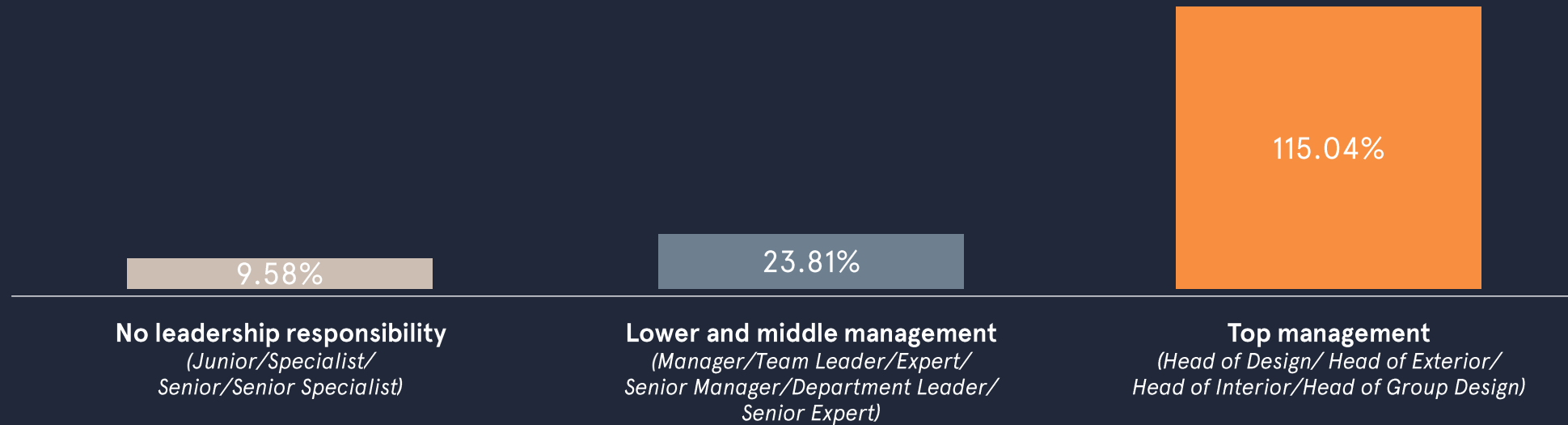


Martin Groschwald
(Managing Director)

„Interestingly, we can see 2 big jumps and 2 smaller jumps when climbing the career ladder. We interpret this jump based on the experience and „usability“ within the specific role groups. For example, a company rates the jump from a Junior to a Senior Position higher (percentage wise) as the individual has not been educated to take care of a project towards production. The actual jump from Senior to Manager is potentially a step back in the productivity of a project, as the skill set might be lost but a step forward in the organisational process. The companies reward a high productivity with a significant increase. If however the employee is trained properly in the process to achieve this high production or if this is simply an effort of the individual can be debated.“

Average annual bonus (%) on basic salary

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Martin Groschwald
(Managing Director)

„The higher the position and therefore the responsibility, the higher the bonus. This, of course, is not a new learning, however, the big jump between middle to top management within the bonus structure shows us one thing that is often forgotten: The actual fixed salary jump is not very large anymore but the potential earnings based on KPI's is significantly higher. A high bonus structure indicates that the actual design work for top managers is not necessarily important, it's the decision making and empowering of the staff that makes up most of their salary.“

Salary comparison between car manufacturers

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer

Start up car manufacturers (founded after 2010) pay

20.38%

higher salaries than established manufacturers

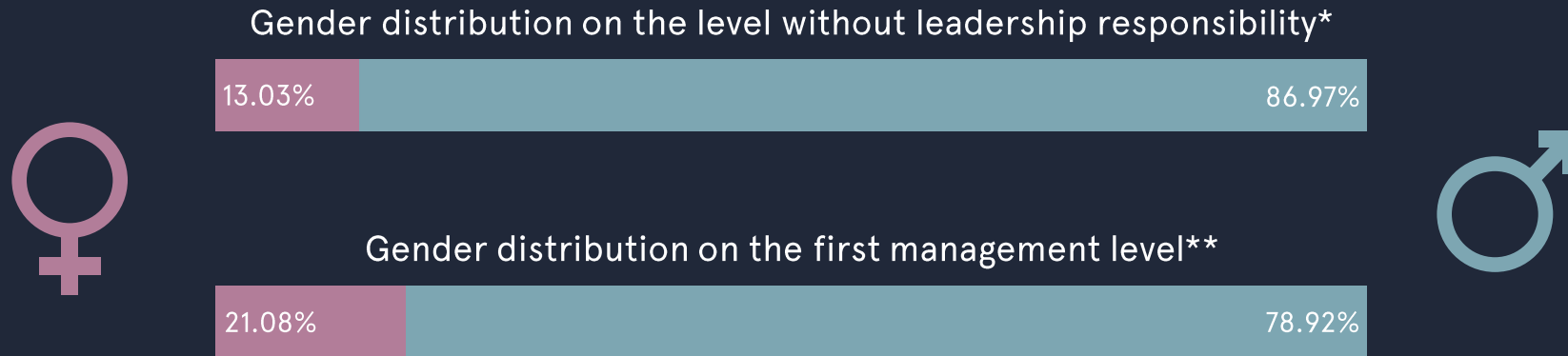


Martin Groschwald
(Managing Director)

„Since 2010 we have seen many companies joining the world of automotive manufacturing and of course, this also came with an increase of hiring from „traditional“ OEMs. These companies have not only attracted talent with the option of starting a brand from scratch but certainly also with financial incentives. It's important to reflect that the 20% stated above only includes direct financial impact (salary and bonus) and not any potential share options.“

Gender distribution

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* Junior & Specialist
** Manager & Team Lead

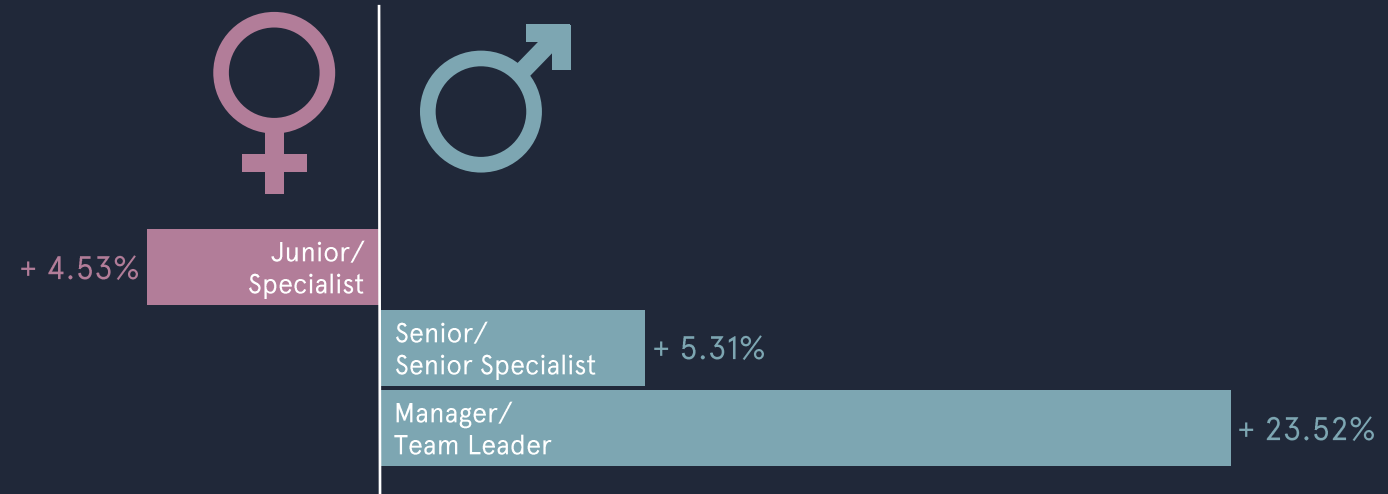


Florian Teufel
(Associate)

„The analysis shows that the representation of women in lower-level positions within design departments is low for automotive manufacturers in Europe, averaging 16.06%. We could not collect reliable data for the middle and top management levels, because according to our study no women are employed at these levels. The results of the study are considered valid since the average proportion of women in the automotive industry is 15.5% ([Catalyst](#)). Furthermore, the study shows that the share of women in team leader positions is primarily within the colour, material & trim department.“

Gender salary gap

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer ☑ Working in Europe



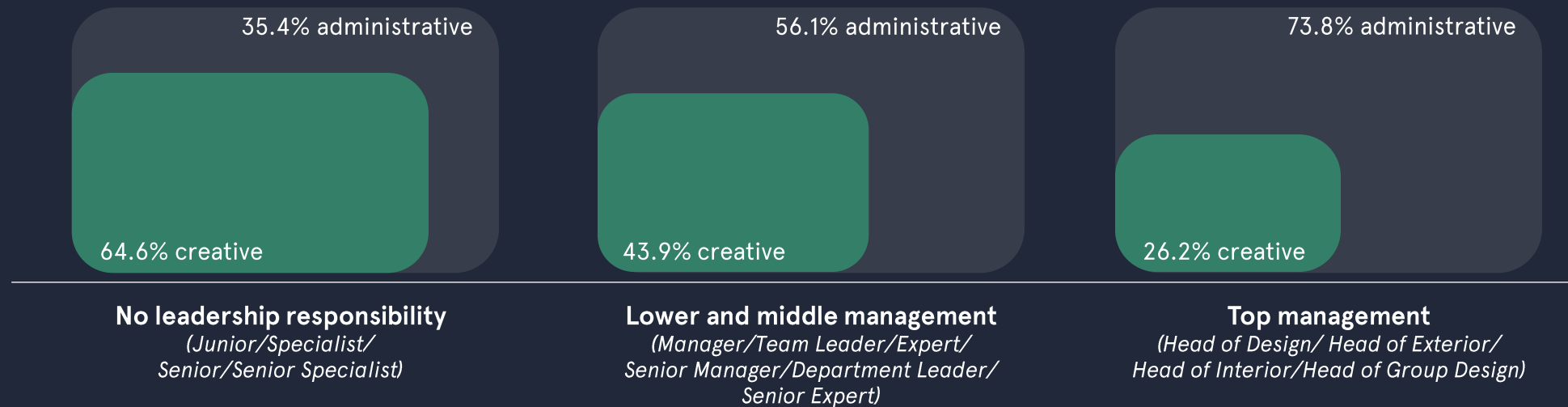
Florian Teufel
(Associate)

„At the levels without management responsibility, the differences between Junior and Senior almost neutralize each other, thus no gender salary gap is found in the collected data. However, at the first management level the gender salary gap is significant, at 23.52%. In our opinion, this value should be critically examined and is influenced by the following factors:

1. A higher response rate from men in the collected data
2. The fact that in the department colour, material & trim (see slide 7), salaries are lower, for example, than in the exterior departments
3. Furthermore, we observe that men tend to change companies often and thus negotiate their salary more frequently.“

Percentage of time spent on administrative vs creative work

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Oliver Vogt
(Partner)

„The result of this question was surprising to me. I think young team members, without any management responsibility, should be able to work 80% - 90% on creative tasks. On the other hand, the higher levels show they still invest relatively large amounts of time into creative output. As a design manager „administration“ should mean to invest time into leadership and coach your team so that they can deliver the best creative results, learning from your experience – so anything but boring!“

European average annual training budget*

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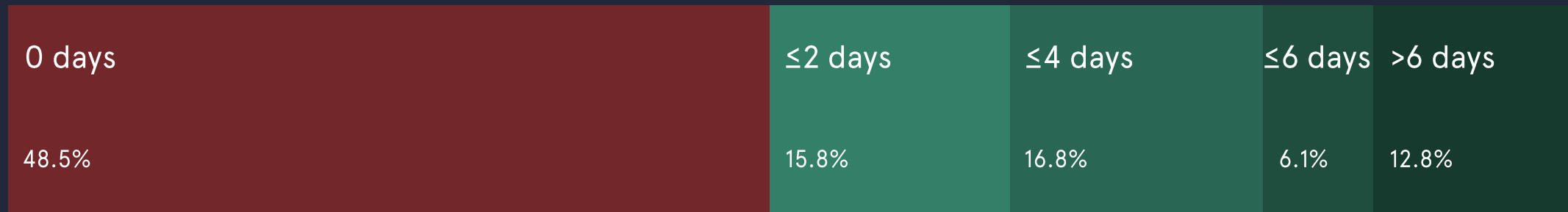


Oliver Vogt
(Partner)

„As a Senior Manager, I personally always reserved a certain budget block for training the department – no matter which hierarchy level. „Training“ however, for Vice President or Head of Design levels usually means coaching and participation in coached workshops. Unfortunately, the training budget is one of the first areas that is reduced when it comes to cost cuttings, which can be very short sighted to stop investing in your team's future.“

Annual available training days

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Oliver Vogt
(Partner)

„Only half of all employees are eligible to be trained?“

I rather assume that managers tend to not communicate to their teams how many days are available to be more flexible in the distribution and allocation of training days. A typical software training takes at least 5 days, for management training of design managers or coaching sessions we recommend 4-6 days per year.“

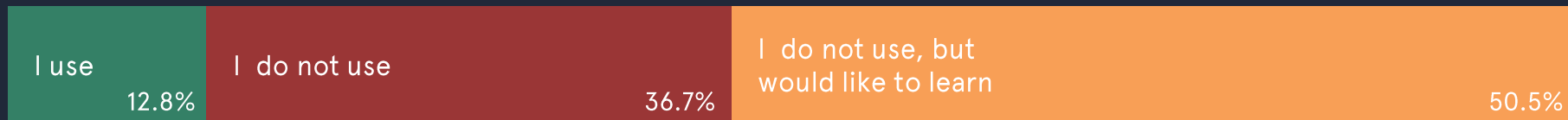
Use of 3D software tools (Alias, Blender, Maya)

☒ Design department ☒ Full time employee and temporary employment ☒ Automotive manufacturer ☒ Working in Europe ☒ Advanced Design, Interior, Exterior, Colour & Trim

Age range: 18 – 34



Age range: 35 – 55+



Asaf Yaacobi
(Academy Director)

“Technology, hardware, and software alike are continually innovating and pushing the industry forward, helping to strengthen and evolve design and engineering. We find a strong correlation to digitalization in the automotive industry with the use of 3D software. The vast acknowledgement for using 3D software in daily tasks has reached a pivotal point, where now there is a growing awareness and interest in future-proofing digitalized work processes and the keen need to upskill. At the same time, the industry has reached a key transitioning point towards digitalization, with enormous upskilling potential, not only for a cost-saving workflow using digital tools but also, faster data communication and multi-users team-based processes.”

The Konzepthaus Design Study in 2021



Leadership & Organisation

(April 2021)



Digitalisation & Design

(July 2021)

Your KDS Team



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