



AMERICAN
SOCIETY OF
INTERIOR
DESIGNERS



RESEARCH



AGENDA:

2016/2017 Outlook and State of the Industry

- Overview/Introduction
- State of the Industry
 - Growth in the Industry
 - Interior Design Business Performance
- Industry Outlook
 - Key Factors Impacting Interior Design
 - Why it Matters – ASID leading the



**ASID advances the
profession and
communicates the impact
of design to enhance the
human experience**

**Quite simply, we believe
design transforms lives.**



**We spend 93% of our
time indoors**

**The 3rd largest population
in the world is US citizens
who are 55 years+**

Resilient Design must be a
priority.



OUR APPROACH:

DEVELOPING THE INDUSTRY OUTLOOK REPORT

- **Government & Trade Data**
- **ASID Interior Design Billings Index**
- **Literature Review**
- **Think Tank Challenge**
- **Think Tank Discussions by Sector**
- **Survey of 100+ Practitioners**



STATE OF THE INDUSTRY

66,500 

INTERIOR DESIGN JOBS

Source: U.S. Bureau of Labor Statistics, Occupational Outlook Handbook

12,971 

**TOTAL NUMBER OF DESIGN FIRMS
(INCREASE OF 3 PERCENT SINCE 2016)**

Source: U.S. Bureau of Labor Statistics, Census of Employment and Wages

5 PERCENT 

**JOB OUTLOOK, 2016-26
(3,300 MORE JOBS)**

Source: U.S. Bureau of Labor Statistics, Occupational Outlook Handbook

\$9.1 BILLION 

VALUE OF SALES (0.6 PERCENT GROWTH)

Source: Barnes Reports, 2016 U.S. Industry Market Report, Interior Design Services Industry



CONSTRUCTION SPENDING

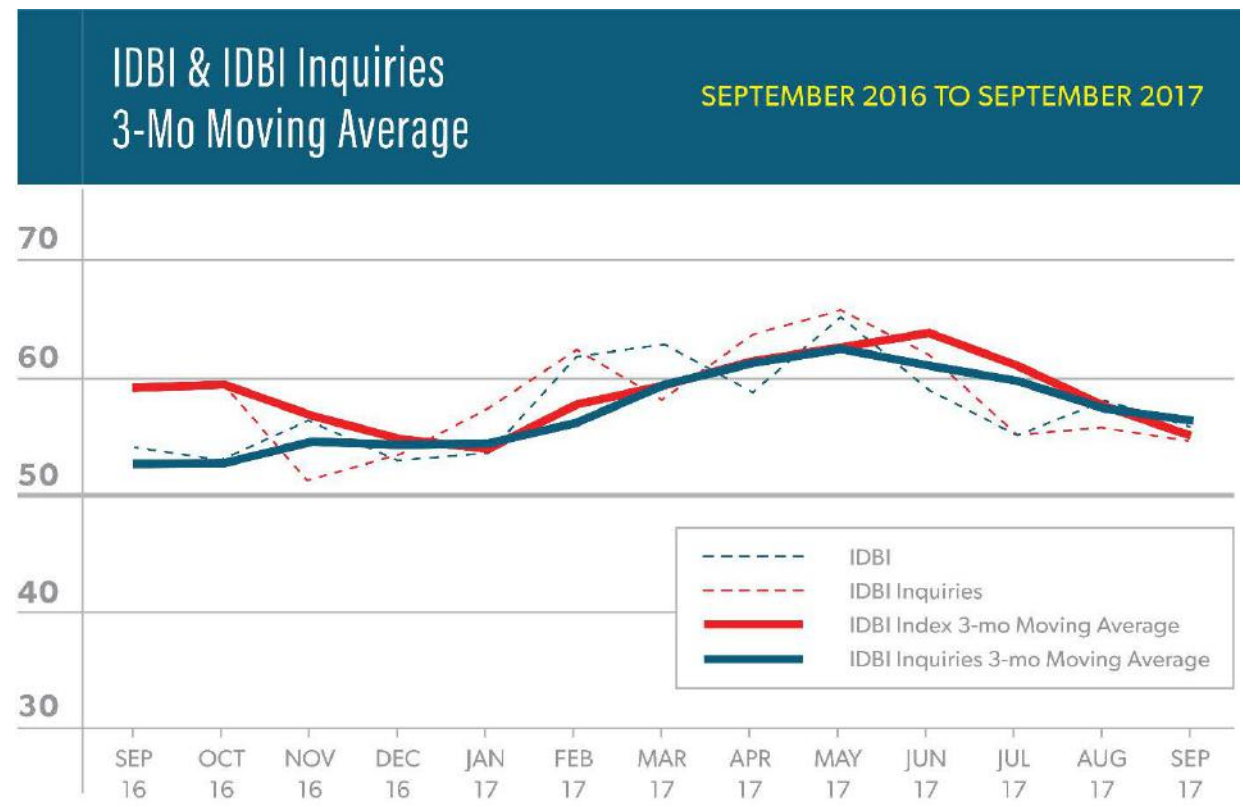
	2017 Q1 (\$M)	% change from 2016 Q1 to 2017 Q1
TOTAL RESIDENTIAL	520,363	+19.5%
New Single Family	260,089	+10%
New Multifamily	65,010	+1%
Home Improvement	195,264	+32%
TOTAL NONRESIDENTIAL	429,293	+5.5%
COMMERCIAL/INDUSTRIAL		
Lodging	27,671	+19.1%
Office	63,654	+15.3%
Commercial/Retail	77,393	+10%
Manufacturing	69,185	-12.8%
INSTITUTIONAL		
Healthcare	31,952	+0.6%
Educational	20,157	+3.7%
Religious	3,463	-12.4%
Amusement/Recreation	12,185	+7.9%
Transportation	11,793	+5.8%

Millions of Dollars
 Seasonally Adjusted Annual Rate
 Source: U.S. Census Bureau, Value of Construction Put in Place: Construction Spending



INTERIOR DESIGN BUSINESS PERFORMANCE POSITIVE, BUT COOLING DOWN IN 2017 Q3

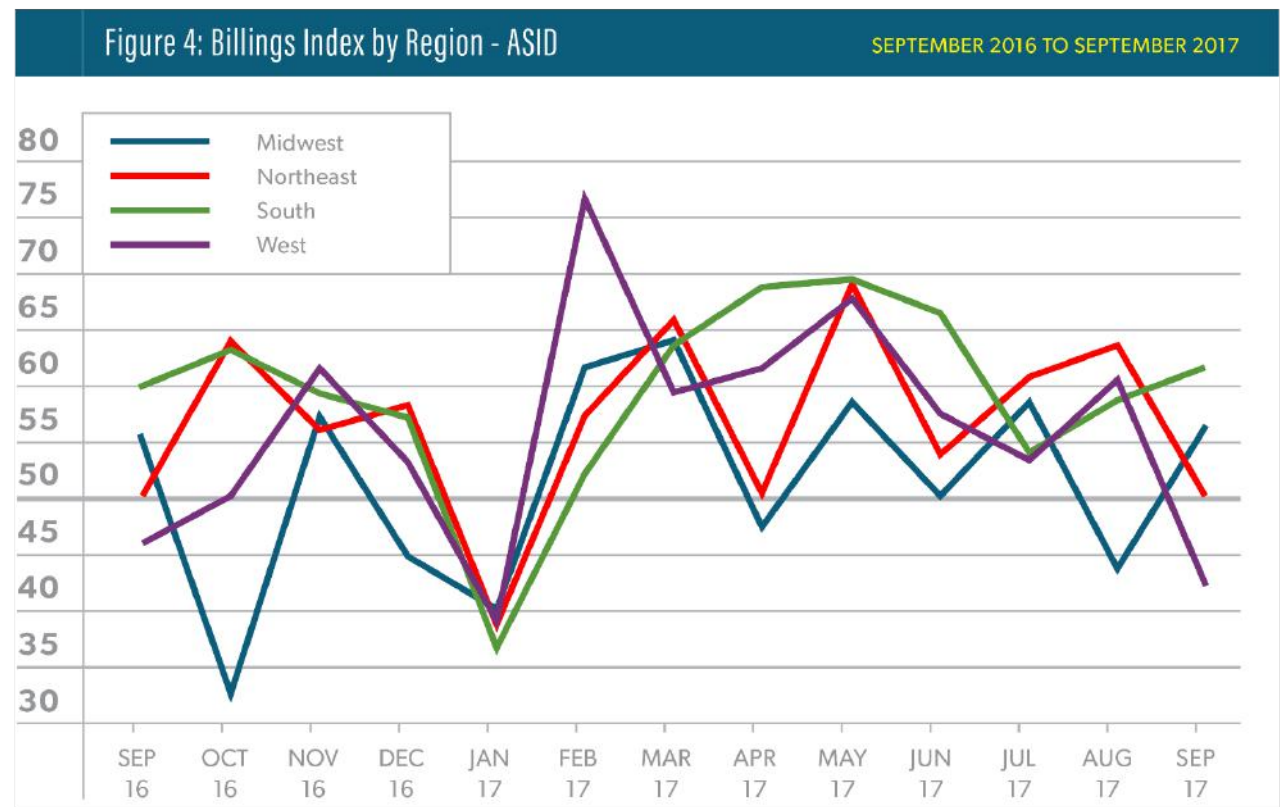
INTERIOR DESIGN BILLINGS INDEX (IDBI)





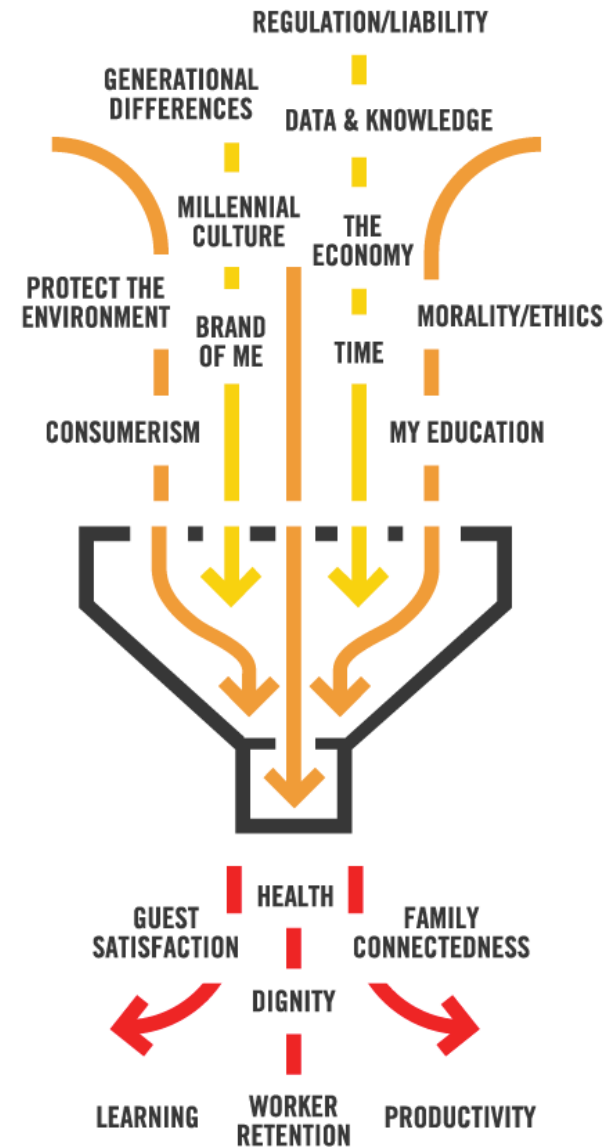
DIFFERING GROWTH IN REGIONS DURING 2017 Q3

ASID BILLINGS INDEX BY REGION





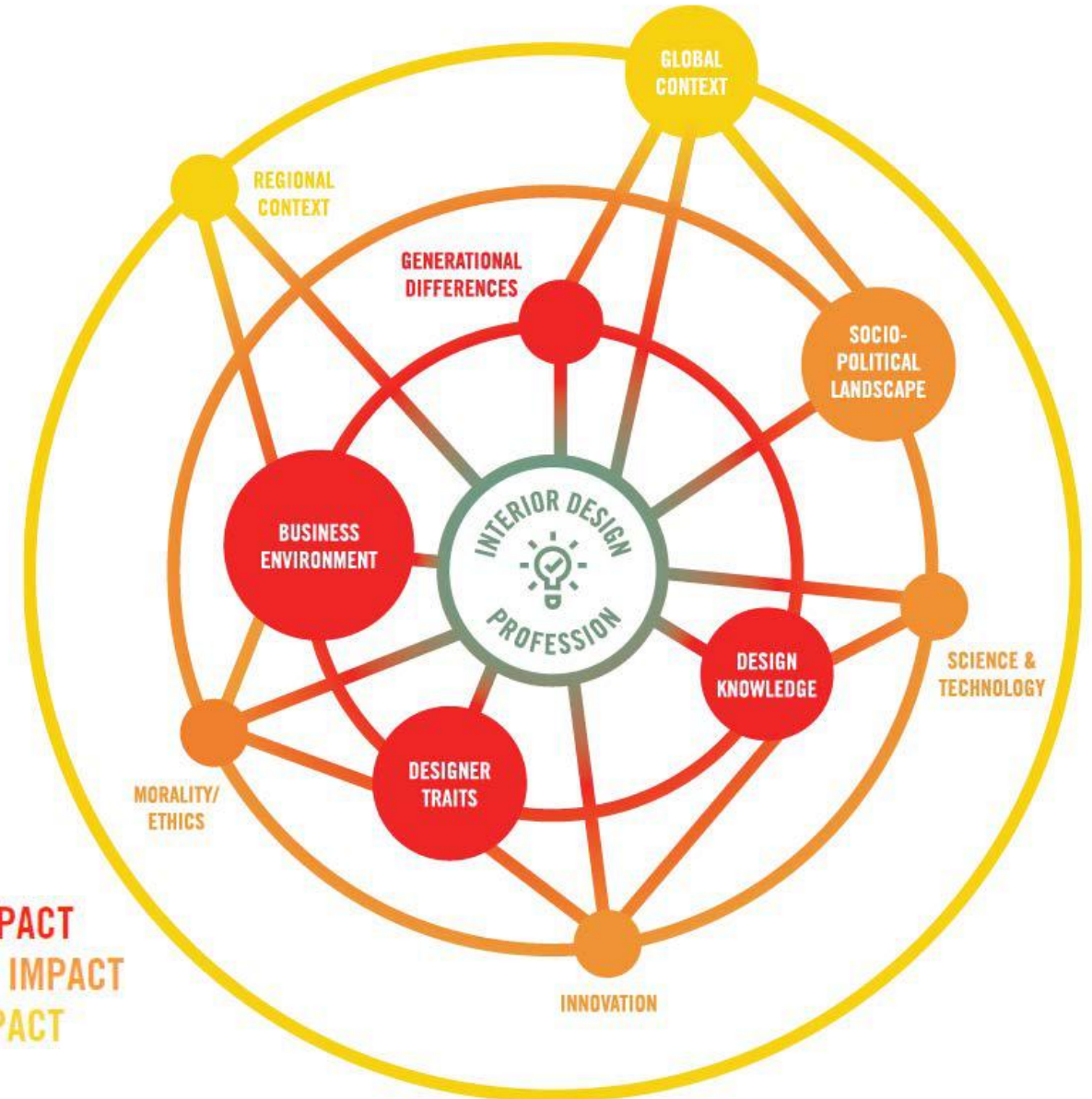
FACTORS THAT AFFECT THE INTERIOR DESIGNER AND THEIR OUTPUT



CONNECTIONS

HIGH IMPACT FACTOR

- Business Environment
 - Pace of Change
 - Industry Economy
 - Competition
 - Perceived Lack of Value
 - Time
 - Costs/Profitability (lack of)
 - Sustainability
 - Regulation/Liability





INDUSTRY OUTLOOK: KEY FACTORS



GLOBAL ISSUES

- The Economy
- Environmental Protection
- Security



CULTURE/VALUES

- Generational Differences
- Well-being
- Community
- Design Excellence



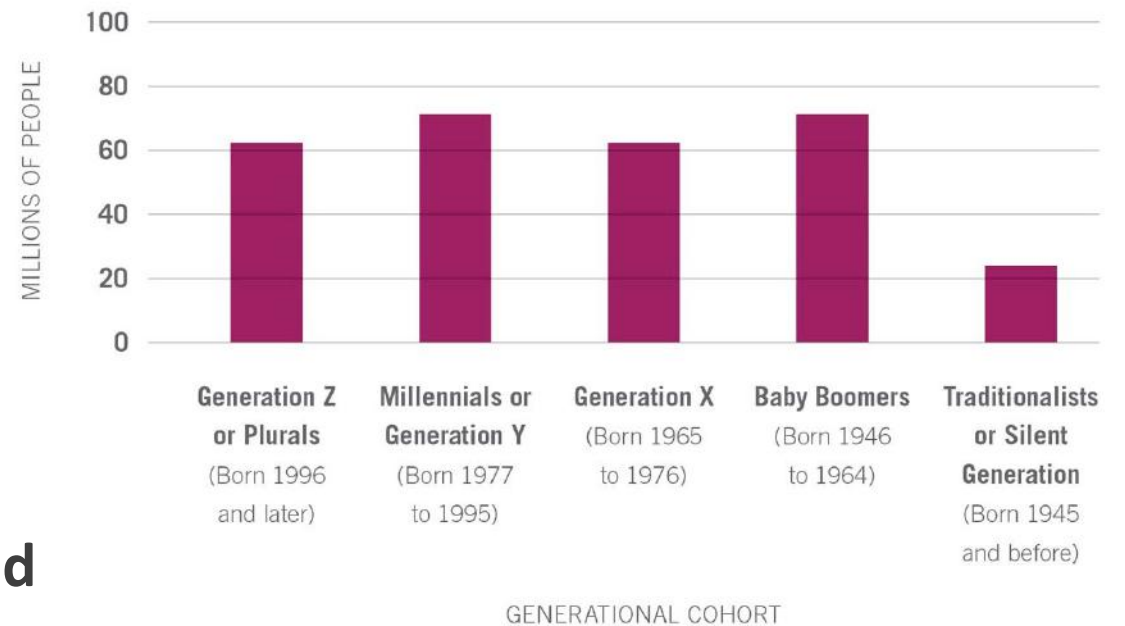
BUSINESS OF DESIGN

- Firm Structure
- Data & Knowledge
- Time
- Value Proposition

KEY FACTOR: GENERATIONAL DIFFERENCES

- Generational timeframes becoming shorter
- Impacts users of space and the design solution
- Impacts the business of design
- Translated differently by design sector
- Moving forward: embrace differences, and either follow or *be* the change

POPULATION BY GENERATION





GENERATIONAL DIFFERENCES: IMPACT ON DESIGN



RESIDENTIAL

- Re-envisioning the family home
- Design for livability



WORKPLACE

- Variety and choice
- Making room for Gen Z



HOSPITALITY

- Bridging generations
- Anticipating needs



HEALTHCARE

- Design methods
- Design for consumer experience



EDUCATION

- Changing Paradigms
- Attracting People



INDUSTRY OUTLOOK: KEY FINDINGS



It's Complicated



It's Dynamic



The Pace of Change is Fast and Getting Faster



We Have the Power





INDUSTRY OUTLOOK: SECTIONS CHANGEMAKER CHALLENGE

DIVERGE



CREATE CHOICES

- Push Boundaries
- Form New Connections

CONVERGE



MAKE CHOICES

- Converge Intelligence
- Demonstrate Impact
- Create a Virtuous Cycle

HOLISTIC

INTERDISCIPLINARY

- Be Facilitators
- Lead the Discussion

INDUSTRY OUTLOOK REPORT



Download the full report at
asid.org/industryoutlook





DESIGN IMPACTS LIVES

AMERICAN
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INTERIOR
DESIGNERS



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CAREER

EVENTS

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THE PROFESSIONAL ASSOCIATION FOR INTERIOR DESIGNERS

The American Society of Interior Designers (ASID) advances the interior design profession and communicates the impact of design on the human experience.

LEARN MORE →

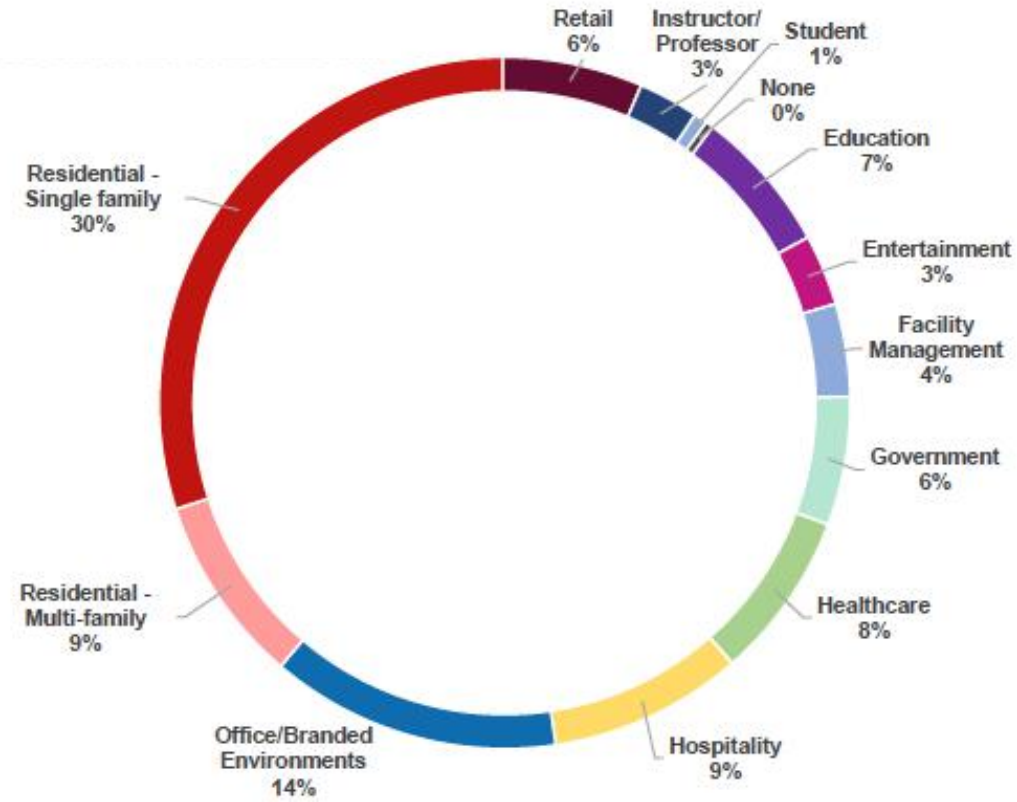
FIND A
PRO



(Coming Soon) Find the interior designer that best fits your design needs.

SEARCH YOUR AREA →

Practice Areas



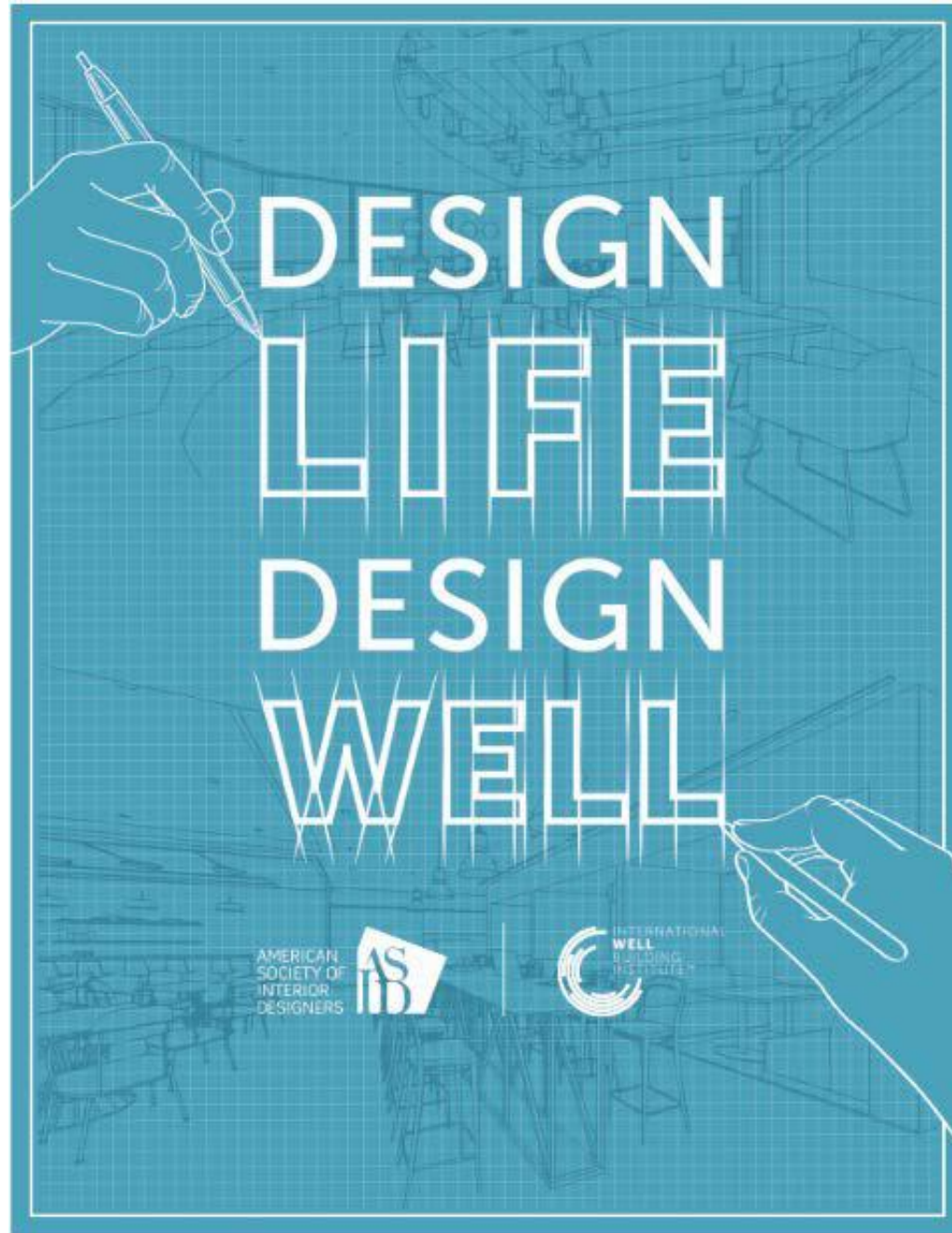


WELL DESIGNED

AMERICAN SOCIETY OF
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can design

**SAVE THE
WORLD?**

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THANK
YOU!



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