

# A perspective on the Design Sector in Europe

**BEDA member's survey 2024** | PUBLIC

January 2025

**BEDA** The Bureau of European  
Design Associations

## Author's note

Europe's current challenges are complex and critical to every European citizen's future well-being and security. The years 2025–2026 will be decisive, marked by political and social transformation processes that have impacted all BEDA member organisations.

The years 2020 to 2024 were marked by profound crises: the COVID-19 pandemic, the war in Ukraine, the conflict in Gaza, the slump in economic performance in Germany—one of Europe's most vital economic powers—the increase and severity of natural catastrophes, and a noticeable shift to the right in many EU member states.

Alongside these ecological, societal, and political challenges, technological changes arising from the ubiquitous availability of generative AI have created a new field of concern as well as new workflows in the design sector, accompanied by an emerging need for a revised perspective on intellectual property rights and copyright legislation.

This survey provides insight into the current status of the design organisations and their national design industry in geographic Europe.

You want to know, what BEDA – the voice of Design in Europe – stands for? Check our position paper!



### Imprint

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## About BEDA

**BEDA is the European Design organisation of design associations and design centers.**

**We are 50+ members in 25 countries and as such represent thousands of designers – directly and indirectly.**

BEDA speaks for the design community and along with its members, it influences policy development and in turn governments.

BEDA champions the role of designers in a business and social context and encourages organizations and governments to embrace design methodologies to solve complex problems and to lead innovative practices.

Voices about the survey:

*„Congratulations for this survey! :)”*

*„This survey is quite comprehensive.”*

*„Thanks for including our questions ;)”*

*„How to finance all that?”*

## About the survey

As a member organisation, BEDA thrives on understanding the needs and desires of the design community in Europe.

In addition to regular contact in online formats, BEDA conducts an annual Members’ Survey to prepare the BEDA Board and Executive Team for future actions. Future members’ surveys will be conducted biannually to accommodate the needed analysis and synthesis.

### Survey Design

Since its first rollout in 2014, the member surveys have been stand-alone surveys that follow the annual information needs of the BEDA Board and Executive Team. This approach has the advantage of providing targeted information but missed the opportunity to gain a longitudinal perspective on the development of European design as seen through the lens of European design organisations (design centres, associations, educational institutions, and professional organisations).

The authors re-created the structure of the members’ survey to enrich communication with the European Parliament and the European Commission. They have laid a sound foundation for long-term perspectives on the European design market. As such, the 2024 member survey enables a long-term core data set to follow the developments of European design organisations and the needs and desires of its members. This survey structure offers members additional value by enabling them to include questions of interest in the questionnaire.

### Terminology:

#### Design Sector

Every entity in the design area, from professional designers to university researchers to design associations or design museums.

#### Design Industry

Design Professionals, or Design Agencies which rely on the services they provide towards clients or projects.

## Executive Summary

### Method

The online survey was programmed in Typeform and sent out to 53 member organisations.

Responses from 26 member organisations were received between October and November 2024.

The answers stem from Professional Design Associations, Design Promotion Institutions, National Design Umbrella Organisations, Design Centre, Governmental Agencies and Design Education and/or Research.

### 1 Industrial Ecosystem

The term defines different sectors within the European Industrial Taxonomy. [Here you will find further information.](#)

### 2 Design Ladder

The term defines the maturity of design integration in economic and societal entities developed by Christina Melander, Danish Design Center. [Here you will find further information.](#)

The survey highlights the current status, knowledge, perspective, and needs of the BEDA member organisations. The insights cover 26 countries representing thousands of designers in their national context.

The study reflects not only the current status of European design organisations but also sheds light on how the status of design in Europe is valued and perceived and the needs and expectations of the European design sector. **All insights are based on the study population, their knowledge, and positions.**

## Key Findings: State of the Design Industry and Associations in Europe

### Design as Profession

Design methods are valued throughout the European Industrial Ecosystem<sup>1</sup>, but designers are not benefiting directly.

Design has yet to be seen as a method provider (as defined in the design ladder<sup>2</sup>) within political decision-making processes and governmental development with the necessary significance.

Although knowledge exchange structures are established between design research and education in the design industry, design research still lacks integration or is not perceived as relevant for the national industry by the respondents. However, design and its methods are identified and perceived nationally as a driver of innovation.

### Economic Situation

During the COVID-19 pandemic, the design industry and sector faced severe drops in budget. In particular, micro-SMEs (1–10 employees) and SMEs (< 50 employees) faced Europe-wide economic hardship due to the lockdown collapse of the entertainment, consumer goods, and service design sectors. This situation persisted post-COVID due to global events and a European decline in economic growth since 2021. The rise of large language models and generative artificial intelligence has accelerated this development.

However, severe cuts were less common during 2021–2023 but have reemerged in 2024 and 2025. In 2024, a quarter (25%) of respondents reported a budget cut, while a further 12.5% of respondents reported severe budget cuts. These figures were higher for 2025 (25.1% and 17.4% respectively).

Consequently, since 2023 (post-COVID), design organisations and the design industry have declined financially and will have to handle budget cuts or severe budget cuts in 2025. Not surprisingly, most responding design associations have diversified revenue streams and are interested in alternative funding options.

### Design Advocacy

A few survey participants reported having direct contact with regional, national, or European policy levels. However, most respondents (approximately 90%) wanted to learn how to advocate for design.

This discrepancy suggests that design associations may face challenges in effectively conveying the needs and desires of the design industry to political decision-making bodies.

### COVID-19 Influence on the Design Industry

**New work,** The COVID-19 pandemic significantly accelerated the adoption of remote work and digital collaboration within the design industry. While this shift offered new opportunities for flexibility and expanded access to talent, it also presented challenges for some companies adapting to this new model. Anecdotally, some agencies reported declines in teamwork and creativity, raising concerns about the quality of design outcomes.

**Focus on Adaptability & Problem-Solving.** Designers have shown resilience and adaptability, emphasising finding solutions to real-world problems, particularly sustainability-related ones.

**Design as Innovation.** The pandemic highlighted the role of design as an innovation method driven by technology and a move towards problem-solving and sustainability over purely aesthetic concerns.

### Design and Artificial Intelligence

Around 40% of design organisations lack AI-related training, guidance, or advocacy. Among those providing support, the primary focus areas include using AI in creative processes and business applications, IP rights, ethical and legal concerns. This highlights AI's impact on the design professions and the adaptability of design associations to set up vocational educational programmes.

### This calls for actions around

- The widespread adoption of AI education programmes should equip all design professionals with the knowledge and skills to leverage AI tools effectively and navigate the evolving landscape.
- Increased focus on ethical considerations, including discussions on AI bias, data privacy, training data, and AI-driven design's social and environmental impacts.
- Collaboration between industry stakeholders to develop best practices, share knowledge, and advocate for policies that support responsible AI development and implementation within the design sector.

### Conclusion on the Status of the Design Industry and Associations

The COVID-19 pandemic profoundly impacted the design sector, driving the emergence of new work models, fostering innovation, and shifting focus towards problem-solving and sustainability.

However, despite its significant contribution as one of the largest sectors within the creative and cultural industries, the design industry faces a paradoxical reality. Financial struggles persist among design associations and professionals, while the industry's substantial economic, environmental, and societal impact remains under-recognised by policymakers and the public.

**This disconnect between the industry's vital role and financial realities underscores the need for more excellent advocacy and support to ensure the design sector can fully exploit its potential to drive innovation, economic growth, and societal progress.**

**BEDA as member organisation with a strong focus on European and International advocacy for Design, seeks the support of the European Commission, to answer the formulated needs to create sustainable growth for economic, ecological and societal well-being.**

3“There is a lack of reliable, comparable statistical evidence demonstrating design’s contribution to the economy and its impact on return on investment. Developing effective evidence-based policies requires comprehensive, reliable methods for measuring the impact of investing in design. Also, there is a need for a comprehensive picture of design investment across Europe.” European Commission (2013). ‘Implementing an Action Plan for Design-Driven Innovation’. SWD(2013) 380 final. p. 7.)

## Needs formulated to foster the Design Industry

### Data Collection and Standardisation

The participants highlighted the need for robust data collection and standardisation within the European design industry. This has been a recurring request from the industry and an unfulfilled promise of the 2013 EU “Action Plan for Design-Driven Innovation”<sup>3</sup>. Having in-depth, comparable data is a cornerstone of evidence-based policy.

To address this, a comprehensive European Design Survey is proposed, utilising NACE codes for consistent data collection and qualitative data gathering to complement the much-needed numbers covering European value-creating design activities. This survey should adopt a 360° approach, capturing the full extent of design’s economic, environmental, and societal impact.

### Integrating Design into EU Programmes and Ecosystems

The respondents emphasised the need to include design in existing EU programmes and build relationships across EU industrial ecosystems.

With the Commission’s support, BEDA is uniquely positioned to facilitate this crucial cross-industry collaboration. It connects its member organisations with industry partners through initiatives such as dedicated networking events, collaborative knowledge-sharing platforms, and joint pilot projects. BEDA can be pivotal in aligning the design sector with broader EU ecosystems and in supporting the unlocking of its full potential to drive innovation, competitiveness, and sustainable growth.

### Sharing Best Practices

The participants stressed the importance of sharing best practices and examples of successful design policy, societal/transformation, and climate-positive projects. This calls for creating a digital platform for sharing experiences and disseminating impact documents.

### Investment in Design

All survey respondents see a strong need for increased investment in design. Particular focus should be given to funding and resources that support cross-industry collaboration, fostering partnerships between design and other sectors to address complex societal challenges, minimise environmental impact, and promote social equity.

Support for innovation and experimentation is crucial, enabling designers to explore new ideas, develop innovative solutions, and push the boundaries of the current design practice through innovation.

Funding opportunities need to be accessible to all segments of the design sector, including micro SMEs, SMEs, independent designers, and those working in emerging areas.

### Joining forces for increased impact

To enhance BEDA’s impact and reach, the survey respondents recommended pursuing a collaboration strategy with non-design and design advocacy groups that share aligned values and strategic objectives.

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## Method

The survey was conducted as an online questionnaire, programmed using a paid version of Typeform. The survey was sent out on October 24, 2024, and closed on November 11, 2024. Duplicate answers were excluded by choosing the latest version.

### Questionnaire Design

The questionnaire was structured with a core data set and an open-question section for members' expectations and questions, collected beforehand.

**The core data questions** consisted of inquiries about the study population, their membership structure, the financial situation combined with a prospective outlook for the upcoming budget year, and the income structures. This core data set will be used to create a long-term perspective on the development and situation of design associations and the design industry.

**The needs and expectations** of BEDA members were asked in order to establish a member-centred directive for the design sector and industry. This enables an aligned approach between BEDA's member needs and the European Commission, its Direction Générale (DG), as well as the European Parliament.

**Members' questions** were collected beforehand between September 26, 2024, and October 14, 2024. These questions were included not only to address national needs but also to support an open forum where the authors of the survey could learn from the members.

### Analysis, Evaluation and Synthesis

Numerical data was descriptively analysed using the dataset provided by Typeform.

Answers to the two open questions about the needs and expectations of the participants were summarized according to the questions and the frequency of the mentioned topics using LLM-Notebook by Google. These summaries were analysed with ChatGPT to create a clear hierarchy of topics of interest within the open questions. Two large language models were deployed to reduce the risk of misinterpretation.

Answers to the open questions provided by the members were treated accordingly. These results were evaluated and discussed by the executive board and synthesised by the authors.

### Ethics

The study was conducted in adherence to the WMA Declaration of Helsinki, 2013. The study survey policy followed GDPR Article 13 of Germany. Each participant gave their individual and informed consent before the start of the questionnaire and agreed to the anonymous publication of the provided data.

#### Step one: LLM Notebook (November 2024)

**Prompt:** Please summarize the provided text and cluster the topics accordingly to frequency mentioned.

#### Step two: Chat GPT (November 2024)

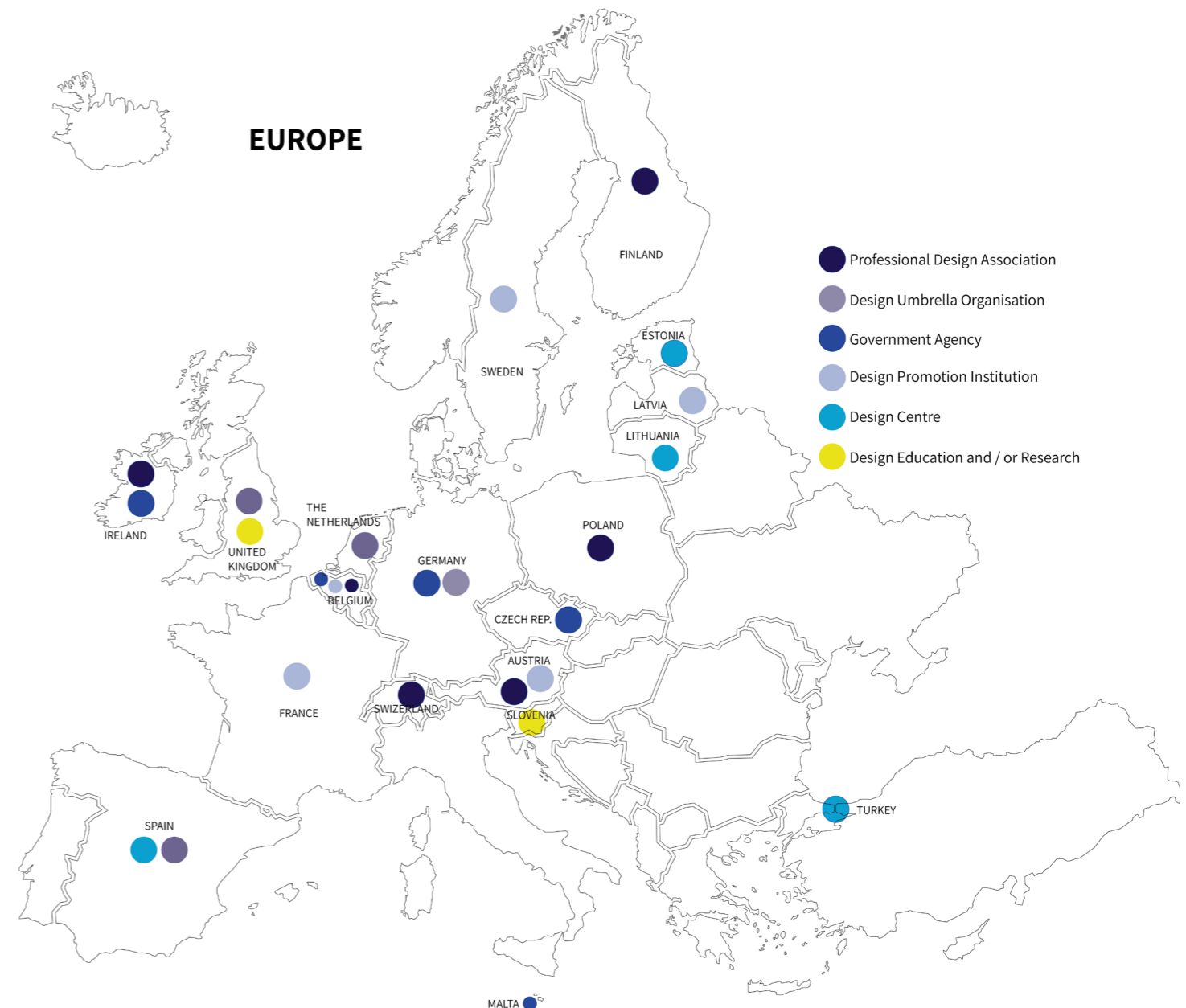
**Prompt:** Please summarize the provided text and prioritize the topics according to frequency mentioned.

### Study Population

The questionnaire was sent to N = 52 member associations, of which N = 26 answered the questionnaire completely (defined as answering over 90% of the questions). The study population covers, to a large extent, the European Union.

Additionally, all types of design-related associations (Design Centres, Design Promotional Organisations, Professional Design Associations, Umbrella Organisations, and Educational Institutions) were represented. **(Fig.1)**.

**Fig 1: Regional and typological Structure of Study Population**



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## Economic Status

### Key Insight

Overall, design organisations and the design industry have experienced a financial decline since 2023 (post-COVID) and will have to handle budget cuts in 2025.

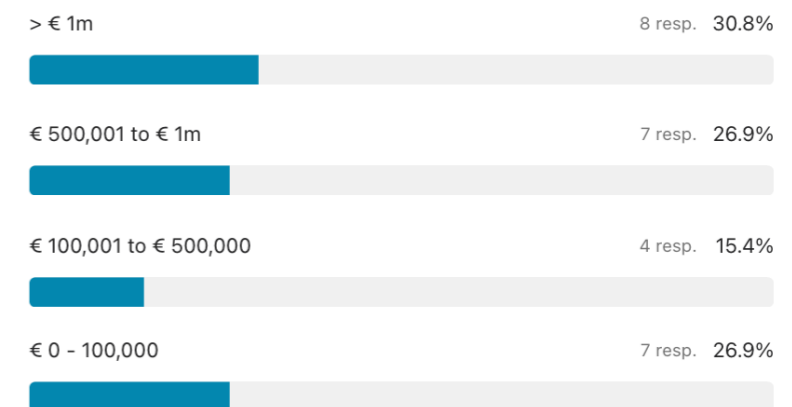
Most organisations have diversified revenue streams and are interested in alternative funding options.

### Annual Budget

Based on the feedback provided by the participants, the current annual budget is predominantly above €500,000. However, the range of income is broad (**Fig. 2**).

The responses to the budget question reveal a diverse financial landscape among BEDA members (**Fig. 1**). Some organisations operate with significant budgets of over €1 million, reflecting larger institutions with substantial resources. Others fall into a mid-range or smaller budget category, highlighting a mix of medium-sized organisations and more grassroots, resource-constrained entities. This diversity demonstrates the broad range of capacities and funding levels within the European design ecosystem, from well-funded initiatives to smaller, dynamic contributors.

**Fig. 2 |** Annual Budget of BEDA Members organisations  
N= 26 out of 26





## Financial Development

The feedback on the budget change question reveals a fluctuating financial landscape among BEDA members over the years. Many members experienced stable budgets, particularly in 2020 and 2021, though this stability has gradually decreased. Budget increases were observed in a smaller but steady segment of members each year, peaking at 24% in 2021 and 2022 before slightly dropping in 2023 and 2025.

However, moderate and severe budget cuts have been a recurring theme, particularly in 2020 and, more recently, in 2025. Severe cuts were less common during 2021–2023 but have reemerged in 2024 and 2025. In 2024, a quarter (25%) of respondents reported a budget cut, while a further 12.5% of respondents reported severe budget cuts. These figures were higher for 2025 (25.1% and 17.4%, respectively).

This may be linked to stagnation in the economy and other market uncertainties. Overall, the results indicate an ongoing mix of financial pressures and resilience among members, with some experiencing growth while others face increasing economic challenges.

The observed decline in financial stability among the survey respondents could indicate a decrease in investment in design and a diminishing willingness of designers to contribute to design associations through membership fees. This trend might signal a worsening of the overall financial situation within the design sector. (Fig. 3)

**Fig 3 |** Budget development of BEDA Members Organisations between 2020 and forecast 2025  
N= 25 out of 26

	Budget increase	Stable budget	Budget cuts	Severe budget cuts
2020	8.3%	62.5%	16.7%	12.5%
2021	24%	48%	24%	4%
2022	24%	52%	24%	0%
2023	12%	52%	36%	0%
2024	20.8%	41.7%	25%	12.5%
2025	17.4%	39.1%	26.1%	17.4%

## Income Structure

The revenue structure of design associations reflects significant reliance on governmental funding and member fees. However, the inclusion of additional revenue streams—such as consulting for the design industry and institutions, award schemes, private sector funding, and exhibitions/fairs—demonstrates a concerted effort to establish a multi-channel revenue structure. This approach helps mitigate risks associated with overdependence on a single source and emphasizes the importance of engaging with and upskilling/reskilling the design industry (Fig. 4).

All respondents highlighted that they are interested in sharing and learning about business models from different design organisations. Eighty percent of the participating organisations review their business models on a regular basis.

**Fig 4 |** Income Structure of participating BEDA Members Organisations  
N= 25 out of 26

	Yes	No
Member Fees	64%	36%
Government Funding	82.6%	17.4%
Consulting or Workshop Fees for the Design Professionals	30.4%	69.6%
Consulting or Workshop fees from the industrial ecosystem or private sector	40.9%	59.1%
Consulting or Workshop Fees from governmental bodies	39.1%	60.9%
Awards	29.2%	70.8%
Exhibitions/Fairs/Design Weeks funded by national or regional governments	54.2%	45.8%
Third-party research funds	50%	50%
Distribution or Sales of Books etc.	18.2%	81.8%
Private Sector Sponsoring	56.5%	43.5%
Foundation support	31.8%	68.2%
Specific project funding	79.2%	20.8%
Other	31.2%	68.8%

## National Impact of Design

### Key Insight: National Impact of Design

While design methods are valued as drivers of innovation, the design industry and its professionals are not recognised as strong contributors.

Design is yet to be widely embraced as a tool for political decision-making or governmental strategy. Knowledge transfer structures between design education, research, and industry exist in some cases but are not universally established. Furthermore, many respondents do not see design research as significant to national industries or in national policies for the industry.

### Key Insight: Advocating for Design

BEDA should enhance its involvement in European design policy through regional engagement, practical resources, and collaboration, while advocating for design at national levels to increase visibility and impact.

### Design Industry

The descriptive analysis highlights that around 35% see the design industry under economic stress, and over 60% state that design is not seen as a core industrial sector and is not perceived as an essential factor for businesses. Yet, over 40% of the respondents highlighted that design is seen as a driver of innovation.

Over 50% of respondents agree that design methods are deployed to foster transformative processes. This might highlight that, whereas design methods are highly valued, designers and the design industry are valued to a lesser extent (Fig. 5).

### Design Education and Research

The survey reveals a disconnect between design education and research and the national industry. Half of the respondents believe design is not integrated into most scientific institutions. Additionally, 50% remain neutral about design research being commonly incorporated into the national industry, while 35% believe it plays no role.

Established structures of knowledge transfer from design education and research to the design industry: 35% of the respondents have established structures, 42% are neutral, and 15% do not have established structures (Fig. 5).

### Design – a Political and Governmental Instrument

The survey data highlights a limited integration of design adoption within political and governmental processes.

Sixty percent said design methods aren't deployed in politics, whereas 15% said they are integral to political decision-making. In governmental instruments, 24% stated that design is part of shaping governmental strategies in their countries, and 46% stressed that design methods and design are not deployed in governmental strategy. This indicates that design methods are only used to a limited extent in political and governmental processes throughout Europe. Design is not integrated into governmental strategies, suggesting a significant missed opportunity to leverage design's problem-solving potential for the public good (Fig. 5).

### The data suggests that design education and research are not widely recognised or integrated into national industries.

Around 35% of respondents acknowledge the need to establish knowledge transfer structures between design education/research and the design industry. Meanwhile, 42% are neutral, and 15% believe such structures are absent. This points to a lack of robust and widely recognised frameworks for knowledge transfer.

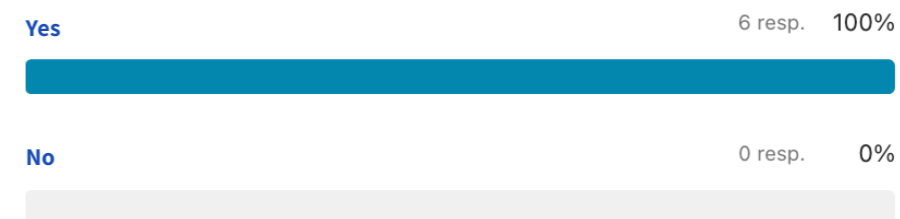
**Fig 5 | National integration and awareness of design, design education and research**  
N= 26 out of 26

	Fully agree	Agree	Neutral	Not at all	Do not know
The design industry is doing extremely well in my country or region	0%	19.2%	46.2%	34.6%	0%
Design is seen as a core industrial sector in my country or region	3.8%	7.7%	23.1%	61.5%	3.8%
Design is seen as an important factor for businesses	3.8%	19.2%	46.2%	26.9%	3.8%
Design is seen as a driver of innovation	7.7%	34.6%	26.9%	30.8%	0%
Design methods are deployed to foster transformation processes	4%	52%	28%	16%	0%
Design methods are integrated in political decision making processes	3.8%	11.5%	19.2%	61.5%	3.8%
Design methods are integrated in governance processes to shape governmental strategies	3.8%	19.2%	26.9%	46.2%	3.8%
Design education and research is integrated in all major Scientific Institutions	0%	19.2%	26.9%	50%	3.8%
Design research is commonly used within the national industry	0%	15.4%	50%	34.6%	0%
We have established structures to transfer knowledge from Design education and research to Design professionals	7.7%	26.9%	42.3%	15.4%	7.7%

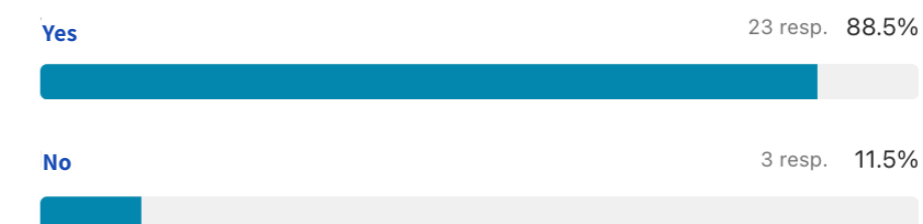
**Advocating for Design:**

Only 6 participants answered the questions about whether they were in contact with regional, national, or European policy levels (Fig. 6). Yet around 88.5% responded that they are interested in learning „how to lobby” for design. This highlights the importance of offering advocacy advice to the BEDA members’ organisations (Fig. 7).

**Fig 6 | Contact with national or regional ministerial or governmental bodies**  
N= 6 out of 26



**Fig 7 | Receiving insights form your fellow members about advocacy for design (How to Lobby) N= 26 out of 26**



**How can BEDA support you in advocating for design at your national and/or regional governmental level?**

The respondents stressed that BEDA should take a more active role in European design policy, which would support BEDA members and foster advocacy for design at national and regional governmental levels.

To do so, public relations and press releases, sharing success stories, and influencing EU regulations to highlight the role of design should increase visibility at the European level.

Survey respondents also suggest that BEDA organise regional visits by its Board, facilitate reverse missions or inspiration trips to share best practices, and exchange insights from the countries seen as design leaders. This requires regional engagement through the BEDA Board’s visits to member countries and major conferences, fostering stronger connections with local communities.

BEDA should provide practical resources such as missions, insights, case studies, policy memoranda, and impact studies while fostering collaborative advocacy workshops and knowledge-sharing events. Furthermore, BEDA’s role as a source of data, research, and lobbying at the EU level is critical, as it could help engage MEPs, align with European agendas like net zero and innovation, and strengthen ties with key sectors.

Finally, fostering connections with politicians and international contacts and promoting collaborative knowledge transfer from countries with successful design reforms are essential actions.

To ensure those aspects of sustainable operations, BEDA should explore funding opportunities through accessible, low-bureaucracy programmes and targeted EU partnerships.

## Quotes:

### What do you need from the EU and/or national government to support your national design industry/sector, design education, and research?

”First and foremost, our governments need to create awareness that design has an economic value in addition to other aspects.

BEDA should have taken it upon itself to prepare such a data-driven message and to communicate it at the EU level, so that it can then be communicated at the national level.

As an organisation, BEDA needs to be present at major regional conferences and government meetings. This would require a change—for example, by electing representatives for certain regions who then serve on the Board and communicate with their region on a day-to-day basis.

Higher awareness of the power of design as a lever for innovation and transition in public and social policy.

Reset the NEB!

Money and human resources.

The know-how is available.”

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## Artificial Intelligence

### Key Insight

The widespread adoption of AI education programmes should equip all design professionals with the knowledge and skills to leverage

AI tools effectively and navigate the evolving landscape.

There should be an increased focus on ethical considerations, including discussions on AI bias, data privacy, training data, and AI-driven design's social and environmental impacts.

Collaboration between industry stakeholders is needed to develop best practices, share knowledge, and advocate for policies that support responsible AI development and implementation within the design sector.

## Design and Artificial Intelligence (AI)

### Artificial Intelligence (High Tech)

and Low-tech innovations are shaping “Design” to a vast extent. Design is the “real labor” behind societal changes in high- and low-tech developments and innovations—from changes in the taxonomy of professions and shifts in jobs and workflows to alterations in working conditions and environments.

Generative AI (GenAI) and Large Language Models (LLMs) emerged in January 2023, when the user-friendliness of LLMs and GenAI made AI a ubiquitous tool. The underlying basic models, training sets, and developments came at the cost of copyright infringements, which led to worldwide movements by artists, authors, and designers to counter those infringements.

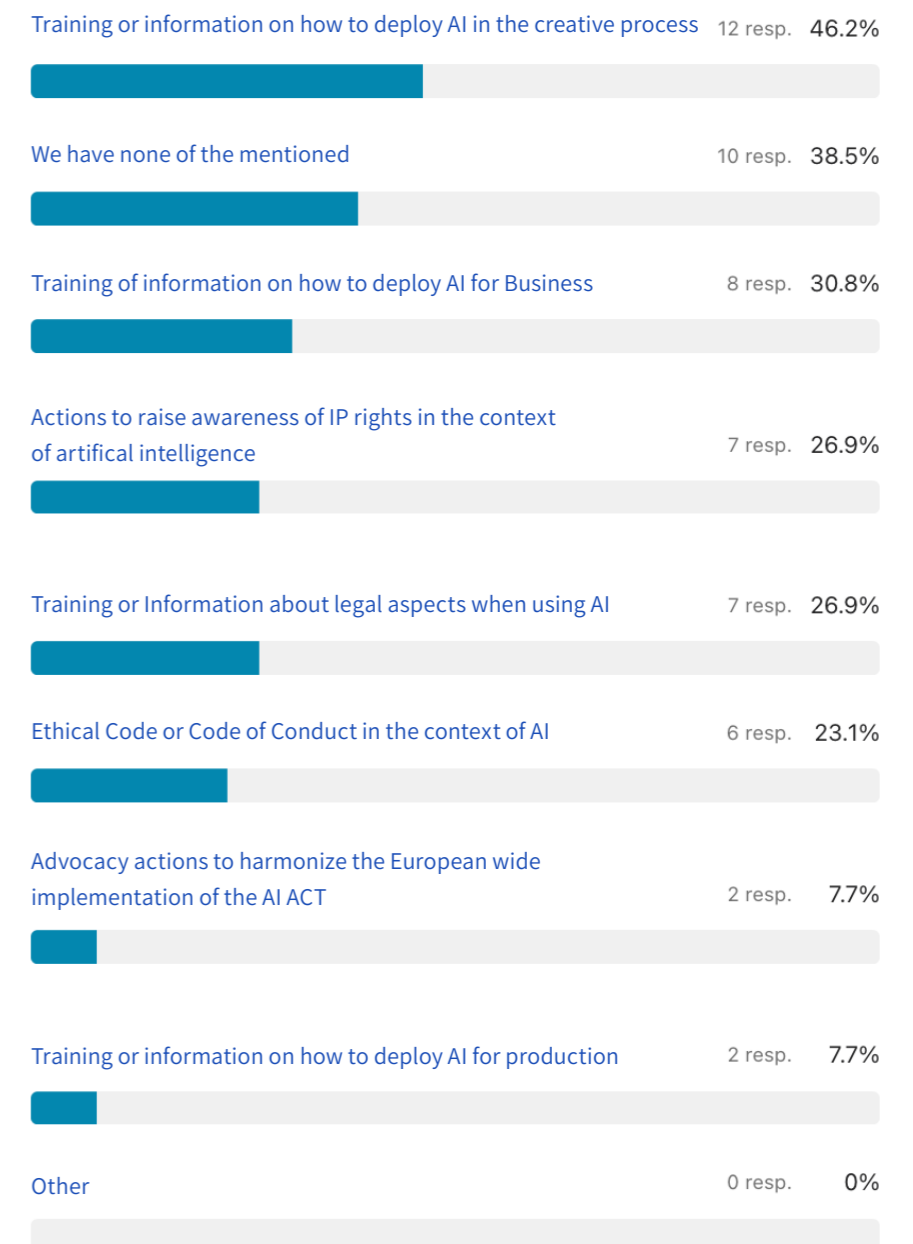
In January 2024, the EU AI Act was the first worldwide regulation to take a risk-pyramid perspective on AI and to consider the topics of content providers. The regulation has strengthened, on the one hand, the position of content creators and, on the other hand, given an advantage to image databases—or, to a lesser extent, text databases.

These developments not only created business and data-driven digital workflows (short-term effects on design) but also raised questions and changed creative processes.

Hence, questions around these topics are of utmost importance to design as an industry and as an innovation driver.

**Around 40% of design organisations lack AI-related training, guidance, or advocacy.** Among those providing support, the primary focus areas include using AI in creative processes and business applications, IP rights, and ethical and legal concerns. This highlights AI's impact on the design professions and the adaptability of design associations to set up vocational educational programmes (Fig. 8).

**Fig 8 | Impact and Status of Artificial Intelligence on creative creation and design business topics N= 26 out of 26**



## COVID-19

### Key Insight

The COVID-19 pandemic profoundly impacted the design sector, driving the emergence of new work models, fostering innovation, and shifting the focus toward problem-solving and sustainability.

However, despite its significant contribution as one of the largest sectors within the creative and cultural industries, the design industry faces a paradoxical reality. Financial struggles persist among design associations and professionals, while the industry's substantial economic, environmental, and societal impact remains under-recognised by policymakers and the public.

This disconnect between the industry's vital role and financial realities underscores the need for more excellent advocacy and support to ensure the design sector can fully realise its potential to drive innovation, economic growth, and societal progress.

## COVID-19 Influence on the Design Industry

### Method

The analysis was generated on basis of the **Fig. 9** and open questions around the topic and its answers.

Over 65% of the respondents, representing a broad range of perspectives on the design industry and design sector, state that the professional work life of designers did not return to pre-COVID status (**Fig. 9**).

**The analysis of the open answers highlighted the following points:**

### New work

The COVID-19 pandemic significantly accelerated the adoption of remote work and digital collaboration within the design industry. While this shift offered new opportunities for flexibility and expanded access to talent, it also presented challenges for some companies adapting to this new model. Anecdotally, some agencies reported declines in teamwork and creativity, raising concerns about the quality of design outcomes that the services are able to deliver.

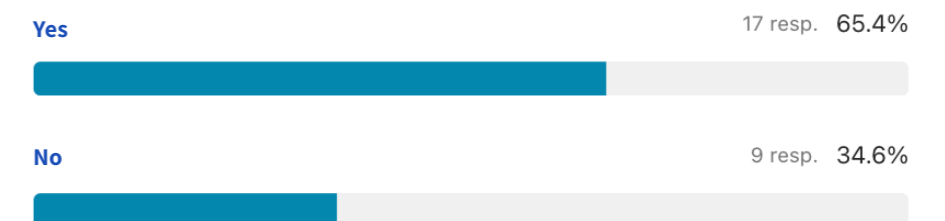
### Focus on Adaptability & Problem-Solving

Designers have shown resilience and adaptability, emphasising the importance of finding solutions to real-world problems, particularly sustainability-related ones.

### Design as Innovation

The pandemic highlighted the role of design as an innovation method driven by technology and a move towards problem-solving and sustainability over purely aesthetic concerns.

**Fig 9 |** Professional work going back to pre-COVID Status in  
N= 26 out of 26





## Strategic Outlook

### Key Insight

Data collection, integration into EU Systems, and cross-industry collaboration emerge as the most frequently discussed themes. Addressing challenges related to collaboration is crucial for ensuring the success of these initiatives. While financial support and sharing best practices are also on demand.

#### **Strengthen the Design Industry**

Conduct a European design survey to gather comprehensive data, adapt NACE codes for standardised statistics, and establish working relationships with organisations across EU industrial ecosystems.

#### **Address Sustainability and Climate Change**

Position design as crucial for addressing climate change, promoting a circular economy, and achieving sustainable development goals.

#### **Advocate for Design's Value**

Promote design's role in innovation, societal and sustainable transitions, clarifying its value to policymakers and industry leaders. Advocate for designers' working conditions and social recognition.

#### **Navigate the Evolving Technological and Political Landscape**

Analyse and address AI's impact on the design profession, protect designers' intellectual property, and navigate the changing political landscape in Europe.

## Topics to be addressed through BEDA

### Data Collection and Standardisation

The participants highlighted the need for robust data collection and standardisation within the European design industry.

### European Design Survey and Using NACE Codes for Consistent Data Collection

This data is crucial for understanding the industry's scope and economic impact and advocating for increased support.

### Design Advocacy

The participants highlighted the need to advocate for designers' working conditions and social recognition. BEDA is encouraged to be a voice for design professionals and connect with grassroots movements within the design community.

The study population also emphasised the importance of clarifying design's global value. This includes showcasing design's role in innovation, societal and sustainable transitions, and addressing the impact of artificial intelligence on the design profession. Several responses mentioned the need to advocate for design within policy and industry, positioning design issues politically and with companies that significantly impact sustainable development.

The participants stressed the need to promote design as a lever for innovation and societal and sustainable transition within policy and industry. Additionally, the participants pledged to advocate for more financial support and human resources for SMEs to enable the correct translation of the DPP (Design Protection Plan).

### Artificial Intelligence

The participants emphasised the importance of addressing artificial intelligence's (AI) impact on the design profession. They also called for protecting designers' intellectual property rights in the face of AI advancements. BEDA is encouraged to help shape the legal framework around AI to protect designers while fostering innovation.

### Skills and Education

There is a call for bridging gaps in design education and industry practices by promoting frameworks for eco-conscious design. The respondents recommend prioritising skills transfer in sustainable design practices to equip designers for future challenges. This includes upskilling and reskilling across digital innovation, sustainable materials, and circular economy principles. The study population also mentioned creative education for all as a key issue.

### Sustainability and Climate Change

The study population stressed design's role in addressing climate change and promoting a circular economy. This includes supporting the transition to a more sustainable economic model and fostering innovation and business competitiveness. „Design for the planet” is highlighted as a key area of focus within that context. The participants emphasised the need to address the ecological transformation and to show political leaders the key role design plays in managing economic, social, and sustainable change.

### Integrating Design into EU Programmes and Ecosystems

This topic was prominently featured in the open questions. The participants emphasised the need to include design in existing EU programmes and to build relationships with EU industrial ecosystems.

BEDA could significantly facilitate cross-industry collaboration by connecting its member organisations with industry partners. This collaboration could be fostered through networking events, knowledge-sharing platforms, and pilot projects, aligning with the goal of integrating design into broader EU ecosystems.

### Economic Growth and Development

The study population identified design as a growth tool and called for mapping the benefits of investment in design. They also advocate for recognising design as a catalyst for innovation and growth, underlining the need to support design involvement in the European economy. This includes recognising the role of designers as partners in shaping a competitive, human, and environmentally friendly economy.

One participant proposed creating a call for a strategic “European-wide Design Economic 2025 Study” based on NACE codes with an extended approach.

### Sharing Best Practices

The participants stressed the importance of sharing best practices and examples of successful design policy, societal transformation, and climate-positive projects. This includes creating platforms for sharing experiences and disseminating impact documents.

### Cross-industry collaborations

Some participants mentioned potential challenges

related to cross-industry collaboration, particularly for BEDA members with limited reach and resources. They suggested focusing on specific issues of interest to industrial participants.

This could be fostered through arranging talks on implementing design processes in different sectors.

### Political Landscape

The participants acknowledged the political changes and economic situation in Europe, which are placing limits on design and ecological transformation. They also highlighted the need to navigate the changing international relations between Europe and China/US.

The (upcoming) Polish presidency of the EU Council in 2025, focused on “security and safety,” is mentioned as an opportunity for BEDA to discuss design in this context.

### Additional Actions

In addition to these clustered topics, the participants suggested several actions, including:

- Building more connections in design business, industry, startups, and education.
- Leveraging agility in Europe and advocating for agility, youth empowerment, rebuilding new urban habitats, creating new businesses, and fostering creative ecosystems.
- Securing EU funding for crossover collaborations with designers.
- Surveying challenges in different organisations across countries.
- Creating a white paper or action plan for influencing EU policy from 2025 to 2029.

These actions aim to strengthen BEDA's influence and enable it to effectively advocate for design and designers in a rapidly changing world.

These strategic tasks aim to strengthen the influence of design in a rapidly changing world, fostering prosperity and sustainable growth.

## **We need your support to create a reality out of those insights.**

This survey highlights the current status and needs of the European design community. It's a call to action for European political structures to join forces with BEDA.

The design community is a driver of market-oriented innovation, which plays a significant role not only in the context of employment but also has the potential to play a pivotal role in Europe's prosperous and sustainable development.

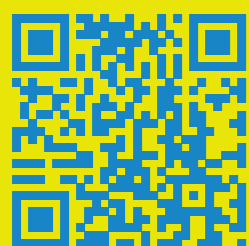
Respondents have emphasised the need for greater awareness of design's economic and societal value, as well as increased funding and resources for long-term strategic projects to support national design industries, education, and research.

Governments and the EU should integrate design into industrial, innovation, and education policies, including STEM and cross-disciplinary collaboration. Respondents advocated for national and European-level design action plans combining diverse measures such as a design impact survey, awareness campaigns, funding, legislation, and incentives for growth.

BEDA has a clear vision:  
Design to be embraced  
in Europe as a driver for  
sustainable growth and  
prosperity.

European design is  
a strategic asset that  
drives low- and  
high-tech innovation  
according to European  
values of sustainability,  
prosperity, and societal  
well-being.

We ask you to sign the **BEDA Position paper**  
to underline those actions.



 **READ**

 **SIGN**

 **SHARE**

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