IIDA | OREGON chapter

2023 State of the Industry Report

The State of the Industry is a research initiative by the IIDA Oregon Chapter that surveys for information to build a higher understanding of the presence, status, and impact of commercial Interior Design in Oregon. Areas of focus include staff statistics, pay range, fee totals, and project types as they occurred in the year 2023.

IIDA Oregon once again partnered with **Chmura Economics & Analytics,** an independent third party, to maintain 100% confidentiality and increase the response rate. The survey was distributed to over 200 design firms of varying sizes across Oregon, focusing on their business practices. Chmura collected **34 responses in total**, *a statistically higher-than-average response rate compared to similar surveys*. All individual responses were kept fully confidential by Chmura and are presented only in aggregate in this report. **As one of the only IIDA Chapters in the country to publish this type of report**, the State of the Industry Survey has been issued since 2015, consistently demonstrating its value and tracking the growth and market impact of interior design.

The collected metrics benefit IIDA Oregon Chapter Members and the design community-at-large as a resource for understanding and tracking the Oregon market as it pertains to project types, hiring, and staffing. The survey also furthers the **vision of the IIDA Oregon Chapter** to:

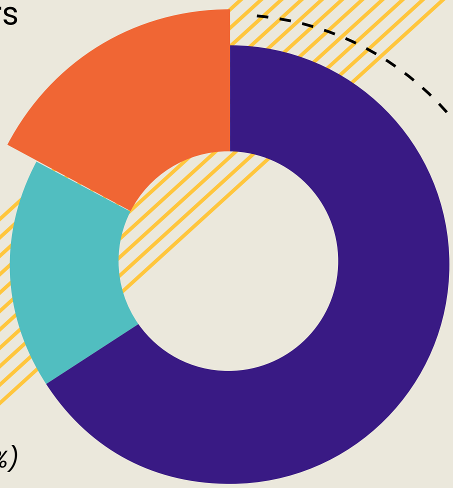
> *"...Enhance the quality of life through excellence in Interior Design and to advance Interior Design through knowledge, value, and community."*

Industry Metrics

Interior Designers constitute an average of

17%

of the design staff at a firm.

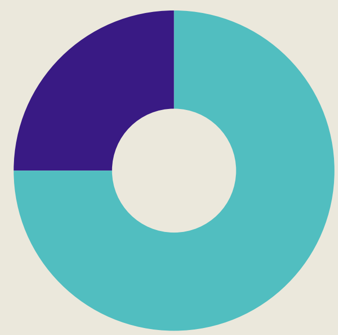


- **Architects/ Architectural Design Staff** *(66%)*
- **General and Other (Admin, HR, etc.)** *(17%)*
- **Interior Designers** *(17%)*

The size of responding firms varies greatly. Seventeen firms report fewer than 10 full time employees, and two respondents report 100 or more employees in their organization. The average size of responding firms employ 21 individuals, and the composition of the average staff includes 16.6% interior designers, 66.3% architects or architectural design staff, and 17.0% general and other staff persons. Firms with fewer than 10 full-time employees indicate a higher proportion of interior designers on staff (51%) relative to firms with between 10 and 100 employees (13%) as well as firms with over 100 employees (13%).

INTERIOR DESIGNERS' GENDER

- **Female** *(75%)*
- **Male** *(25%)*



47%

hold an NCIDQ Certificate

21%

of firms require certification (such as NCIDQ) to become an Associate

AVERAGE INTERIOR DESIGNER ACCREDITATION AND CERTIFICATION RATES

- **NCIDQ Certified** *(47%)*
- **LEED Accredited** *(40%)*
- **WELL Accredited** *(11%)*
- **Licensed Architects** *(6%)*
- **Fitwel Certified** *(3%)*

21%

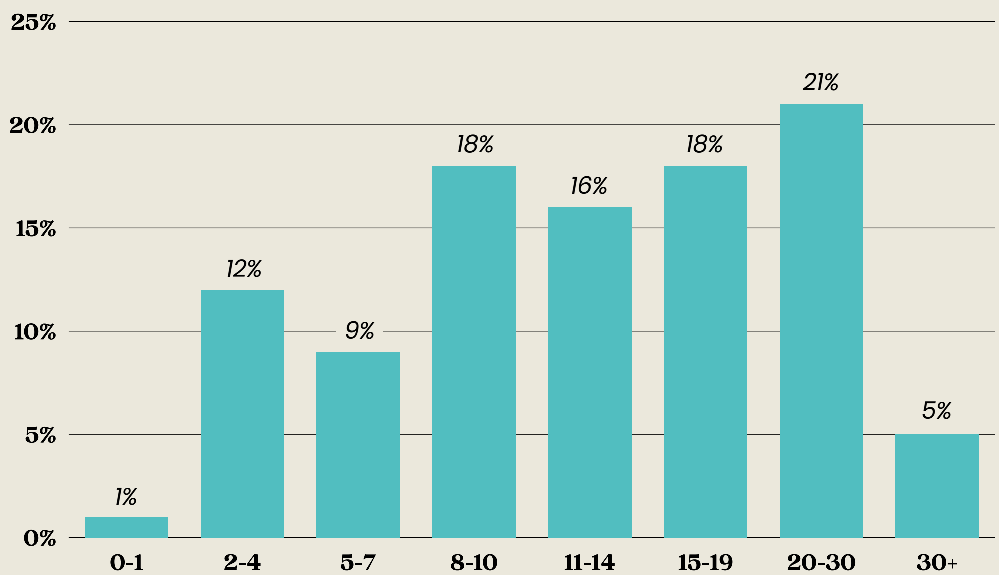
of firms require certification (such as NCIDQ) to become a Partner

Respondents were asked several questions about the demographics, certification level, title, and experience of the interior designers in their firms. An overwhelmingly female profession, 74.8% of interior designers at responding firms in Oregon identify as female and 25.2% identify as male. This information aligns closely with estimates from Chmura's JobsEQ® that 83.1% of Oregon interior designers as female. The most common certifications for interior designers include NCIDQ (46.5% of interior designers per firm on average possess this certification), followed by LEED (Leadership in Energy and Environmental Design; 39.8%), and WELL accreditation (10.8%). Less common certifications include Licensed Architects (5.5%) and Fitwel (3.4%). Both the EDAC (Evidence-based Accreditation and Certification) and LFA (Living Future Accreditation) garnered a response of no interior designers possessing those accreditations. In "Other" responses, respondents mentioned the Green Globes Certification and the Passive House Designer Certificate.

Experience and Roles

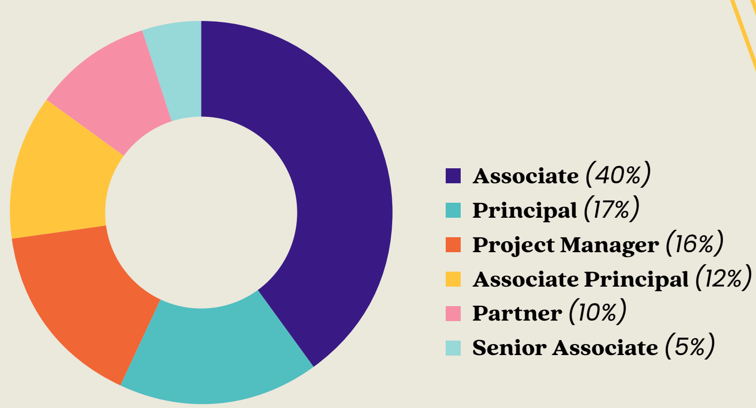
YEARS OF EXPERIENCE DISTRIBUTION OF INTERIOR DESIGNERS

Interior designers in Oregon possess a wide range of experience. Only 1.0% of interior designers at respondent firms report less than 1 year of experience while 4.8% indicate 30 or more years of experience. Interior design experience skews towards greater than 8 years of experience across the remaining various levels of tenure within the industry. Specifically, ranges of experience include, 12.4% with 2-4 years of experience, 8.6% with 5-7 years of experience, 18.1% with 8-10 years of experience, 16.2% with 11-14 years of experience, 18.1% with 15-19 years of experience, and 21.0% with 20-30 years of experience.



ROLES OF INTERIOR DESIGN FIRM STAFF

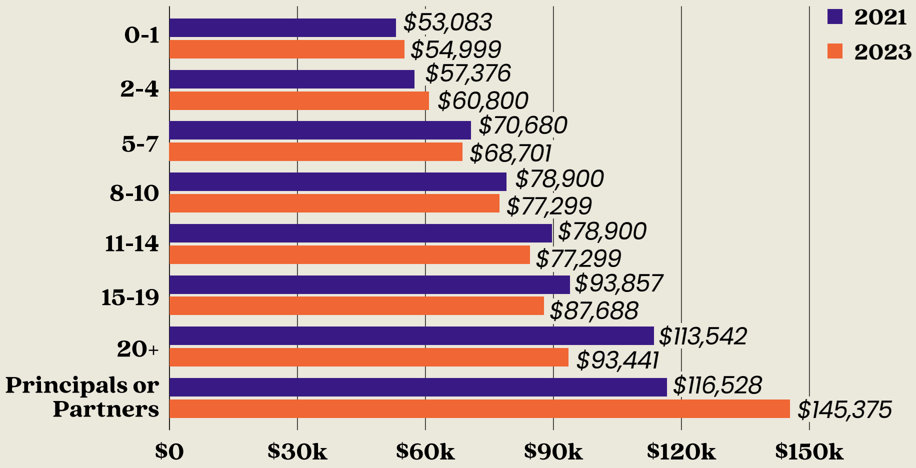
Responding firms report a wide variety of roles among interior designers. Associate, the most common role, accounts for 40.2% of interior designers in respondent firms. Approximately one in six interior designers assume the role of Principal (17.2%) or Project Manager (16.1%). The roles of Partners and Associate Principals account for 10.3% and 11.5% of designers, respectively. A smaller portion of interior designers hold the role of Senior Associate (4.6%).



Salary and Billing Rates

MEDIAN ANNUAL SALARY BY EXPERIENCE AND YEAR

In comparison with the 2021 survey, salaries increased at lower years of experience and for principals/partners but decreased for all other experience levels. Designers with 20+ years of experience faced the most significant reduction in their average reported salary, from $113,542 in 2021 to $93,441 in 2023. Similarly, those with 15-19 years saw salaries decline from $93,857 in 2021 to $87,688 in 2023. Designers with 11-14 years of experience saw a slight decrease from $89,578 in 2021 to $84,424 in 2023, while with 8-10 years of experience saw little change from $78,900 in 2021 to $77,299 in 2023. Designers with 5-7 years of experience faced a decline from $70,680 in 2021 to $68,701 in 2023. On the other hand, designers with 2-4 years of experience saw their salaries rise from $60,800 in 2021 to $57,376 in 2023. Newly hired designers, with 0-1 years of experience, saw their salaries increase from $53,083 to $54,999 over the same period. Lastly, principals or partners experienced a significant increase in their median reported salary, rising from $116,528 in 2021 to $145,375 in 2023.

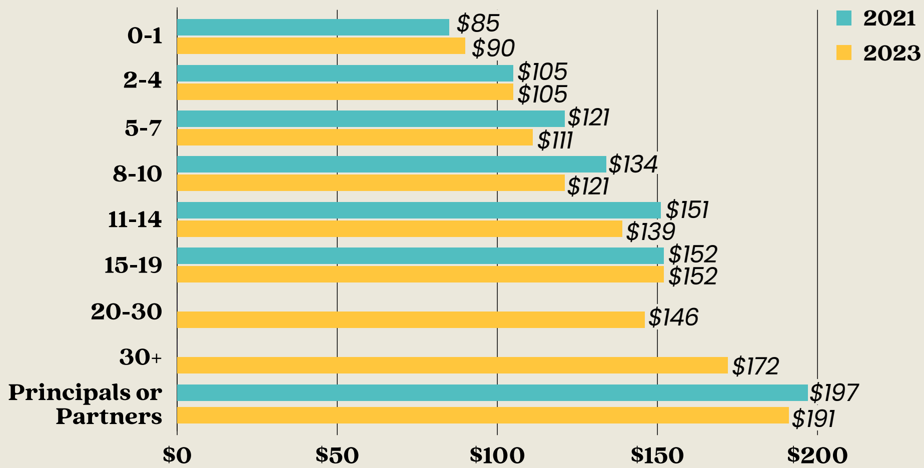


Survey respondents expect interior designer salaries to ***increase 7%*** *on average in 2024*

The decreases in pay are all within the margin of error for both 2021 & 2023 surveys, suggesting they cannot be statistically distinguished from no change. A near doubling of responses for this question between surveys, from 12 to 23, lends greater credence to the 2023 data.

AVERAGE BILLABLE RATE PER HOUR BY EXPERIENCE AND YEAR

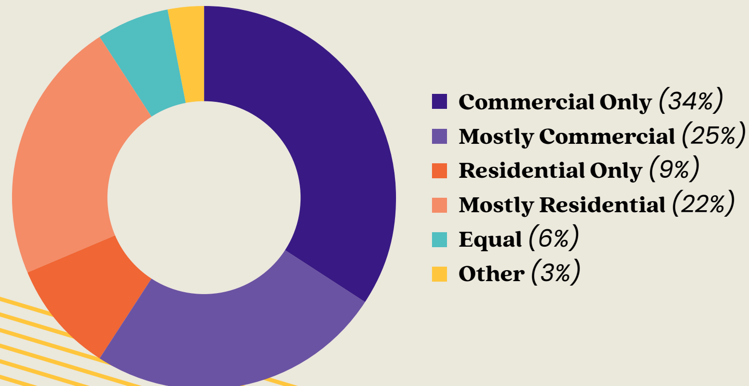
Comparing these rates to those identified in 2021, the average billable hourly rate shows mixed results. While some categories saw increases or remained flat, most experienced decreases, likely due to a much greater number of responses than in previous surveys. Designers with 0-1 year of experience saw an increase in their average hourly billable rate from $85 in 2021 to $90 in 2023. A rate decrease occurred for designers with 11-14 years of experience, where the average hourly billable rate dropped from $151 in 2021 to $139 in 2023. Designers with 8-10 years of experience also saw a decrease from $134 in 2021 to $121 in 2023. Principals or partners experienced a slight decrease in their rates, going from $197 in 2021 to $191 in 2023. For the first time, the 2023 survey collected data from designers with 20-30 years of experience and 30+ years of experience.



Types of Design Firms in Oregon

RESPONDING FIRM TYPE

Respondents were asked several questions about their firm type. Over one-third (34.4%) of respondents work for firms that focus only on commercial projects, while 25.0% work for firms that are mostly commercial (greater than 50% of work). Over one-fifth (21.9%) of respondents work for firms that are mostly residential, and another 9.4% work for firms that focus solely on residential projects. Finally, an additional 6.3% of respondents reported their firm has an equal focus on both residential and commercial projects, and one respondent indicated 'Other' as their firm type.

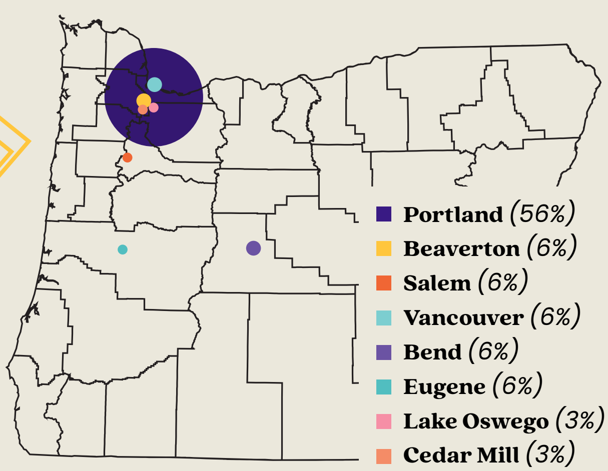


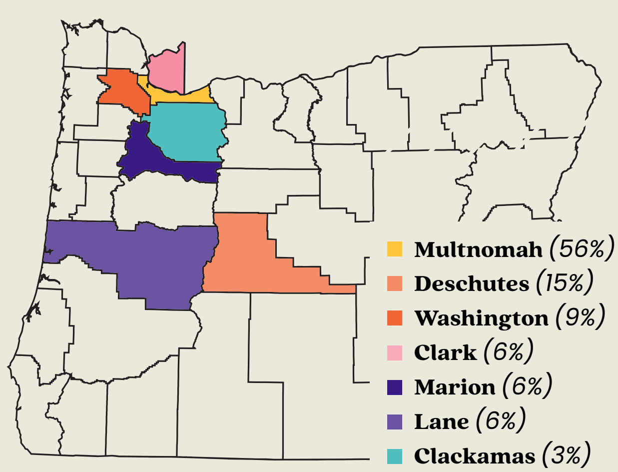
Locations of Design Firms in Oregon

RESPONDING FIRM PRIMARY LOCATION BY CITY

A majority of the responding firms cite their primary location being in or near Portland. More than half (55.9%) of respondents listed their city as Portland. A significant portion (14.7%) of firms is located southeast of Portland in Bend. The remaining respondents are spread across various locations in Oregon and southwest Washington, including Beaverton (5.9%) to the west of Portland, Eugene (5.9%) further south, Salem (5.9%) to the south, and Vancouver (5.9%) across the Columbia River in Washington.

All of the respondents who listed Portland as their firm's primary location also listed Multnomah as their county. The Beaverton-based respondents listed Washington as their county, as did the Cedar Mill respondent. Marion County contains the Salem-based firms and respondents in Bend report their county as Deschutes County. Additionally, Lane County contains the Eugene-based respondents and Clark County includes the Vancouver-based firms.





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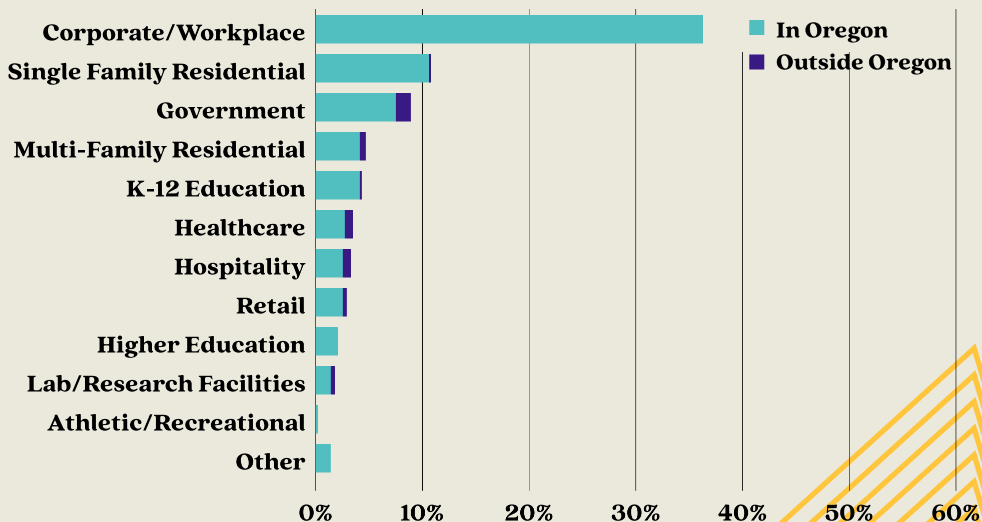
Areas of Practice

PROPORTION OF PROJECTS BY PROJECT TYPE

Respondents were asked several questions about the projects their firm completed and billed in 2023. Responding firms completed 87.6% of their projects within Oregon, completing the remaining 12.4% of projects outside the state. Most projects are corporate or workplace-related, making up 55.9% of all projects, split between 48.4% completed in Oregon and 7.5% outside Oregon. Second most common, single-family residential projects accounted for 10.8% of all projects, almost all of which were completed within Oregon. Government projects made up 8.9% of the total, split between 7.5% completed in Oregon and 1.4% completed outside the state. Multi-family residential and K-12 education projects followed, representing 4.8% and 4.3% of the total, respectively. Most of these projects were completed in Oregon. Healthcare (3.5%), hospitality (3.3%), and retail (2.9%) projects also formed a smaller but notable portion of the total, with a high proportion of these projects completed in Oregon. Less common project types included higher education (2.1%), lab/research facilities (1.9%), and 'Other' projects (1.4%), all also primarily completed in Oregon. Least common, athletic/recreational projects made up just 0.2% of the total and all took place in Oregon.

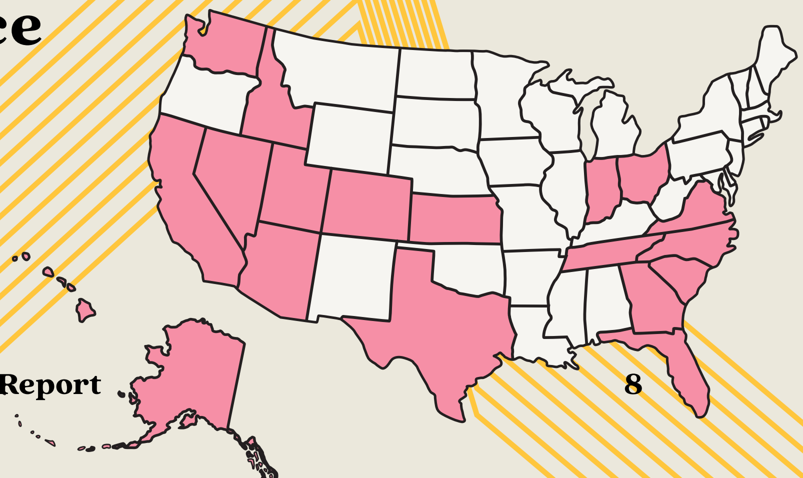


Responding firms completed **87.6%** *of their projects within Oregon*

Locations of Practice

STATES WITH WORK COMPLETED IN 2023

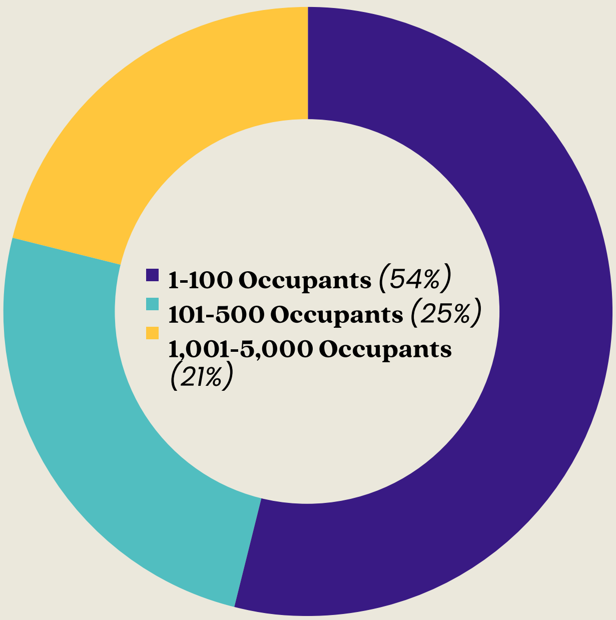
Responding firms completed work in 19 states outside of Oregon in 2023.



Oregon Project Information

APPROXIMATE OCCUPANTS OF OREGON PROJECTS

The remaining questions in this section concentrate on Oregon-based projects. At least one interior designer was staffed on the project team for 61.7% of projects respondents completed in Oregon in 2023. The survey asked respondents about the total number of occupants for all their projects. Projects for 1-100 occupants accounted for the majority, at 54.2% of all completed projects. The next most common project size is 101-500 occupants, making up 25.0% of the total occupants. Projects for 1,001-5,000 occupants followed, accounting for the remaining 20.8%. Those surveyed reported no projects for the 501-1,000 occupant range, the 5,001-10,000 occupant range, or for more than 10,000 occupants.



At least one interior designer was staffed on the project team for

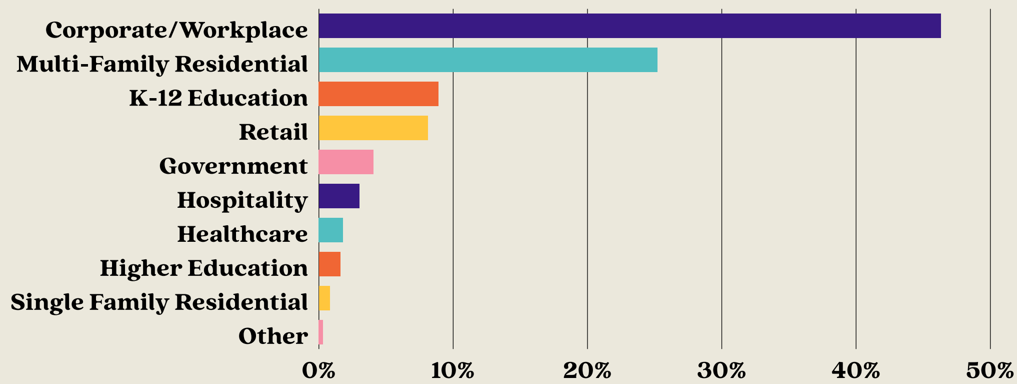
61.7%

of projects completed in Oregon by respondents in 2023

Oregon Project Information

APPROXIMATE PERCENT OF SQUARE FOOTAGE BUILT BY PROJECT TYPE

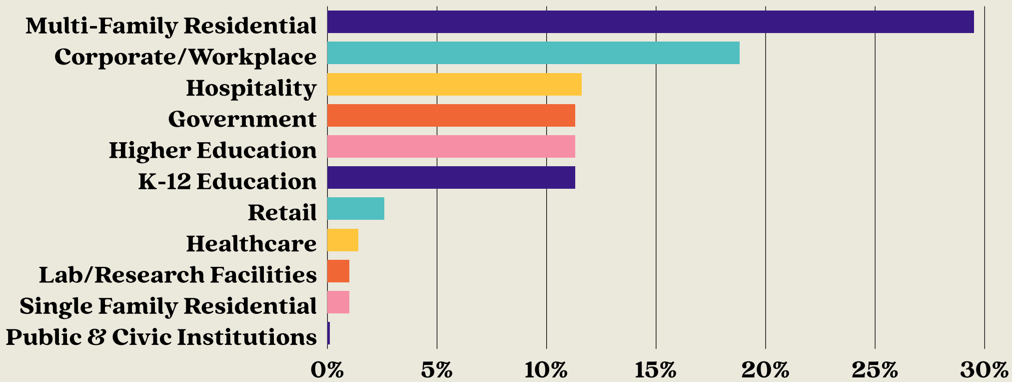
Corporate/workplace projects dominated the square footage of projects completed in 2023 projects, which accounted for approximately 46.3% of all square footage of reported projects. Multi-family residential projects held the next highest proportion, making up 25.2% of the total square footage. K-12 education projects accounted for 8.9%, followed by retail projects at 8.1%. Government projects composed 4.0% of the square footage, while higher education and hospitality projects accounted for 1.6% and 3.0%, respectively. Healthcare projects represented 1.8% of the total square footage, while single-family residential projects accounted for a smaller portion at 0.8%. 'Other' projects made up the remaining 0.3% of square footage. The largest number of projects fell between 10,001 and 50,000 square feet in size, followed by 100,001 and 500,000 square feet in size. Overall, an interior designer at respondent firms in Oregon reported involvement in projects totaling nearly 3.7 million square feet.



Responding firms reported involvement in projects totaling nearly **3.7M** *Square feet*

APPROXIMATE PERCENT OF FEES BILLED BY PROJECT TYPE

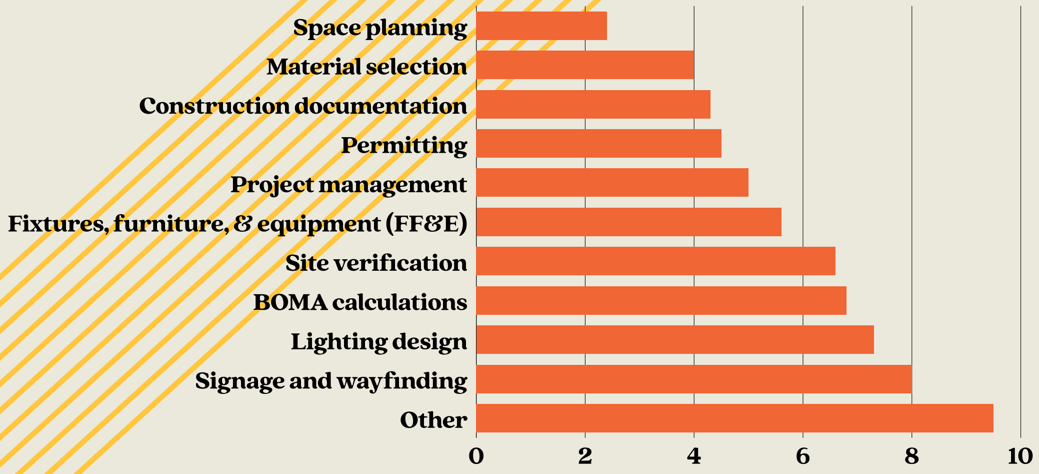
Respondents were also asked to list total fees for projects their firms billed to 100% in 2023. Multi-family residential projects accounted for the highest proportion of total fees at 29.5% of all fees billed. Corporate/workplace projects followed, representing 18.8% of the total fees billed. Hospitality projects accounted for 11.6% of the fees, with government, higher education, and K-12 education projects each making up 11.3% of the total. Retail projects represented 2.6% of billed fees, while healthcare projects accounted for 1.4%. Lab/research facilities and single-family residential projects each made up 1.0% of the total fees billed, and public and civic institutions contributing the smallest portion at 0.1%. Respondents reported no fees under the 'Other' category.



Interior Design Services Provided

AVERAGE RANKING (1-11) OF THE SHARE OF INTERIOR DESIGN SERVICES PROVIDED

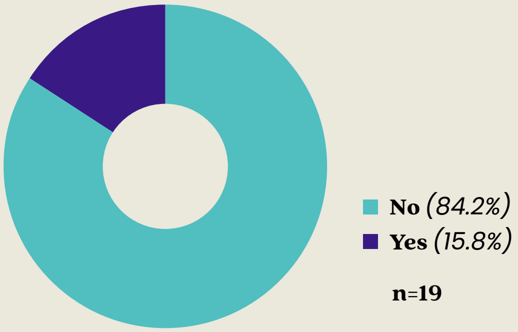
Respondents ranked services provided by their firms according to the share of interior design work from 1 to 10. A lower number (closer to 1) indicates a greater share of work devoted to that service. Space planning, identified as the service with the largest share, received the highest average ranking of 2.4. Material selection (4.0) and construction documentation (4.3) followed as significant portions of the work. Other key services provided included Permitting (4.5) and project management (5.0), while fixtures, furniture, and equipment (FF&E) ranked slightly lower at 5.6. Services such as site verification (6.6), BOMA calculations (6.8), and lighting design (7.3) reported smaller shares. Signage and wayfinding (8.0) and 'Other' services (9.5) were ranked as having the lowest share of interior design work among the options provided.



n=17

NEED FOR ARCHITECT STAMPING & SEALING SERVICES

Respondents were asked if they or their firm needed to hire the services of an architect or similar design professional to stamp and seal permit drawings in 2023. This extra step may slow down interior design work. Most respondents, 84.2%, indicated that they did not require such services, while 15.8% reported that they did. Most "No" respondents clarified that they have an architect on site and did not require outside services.



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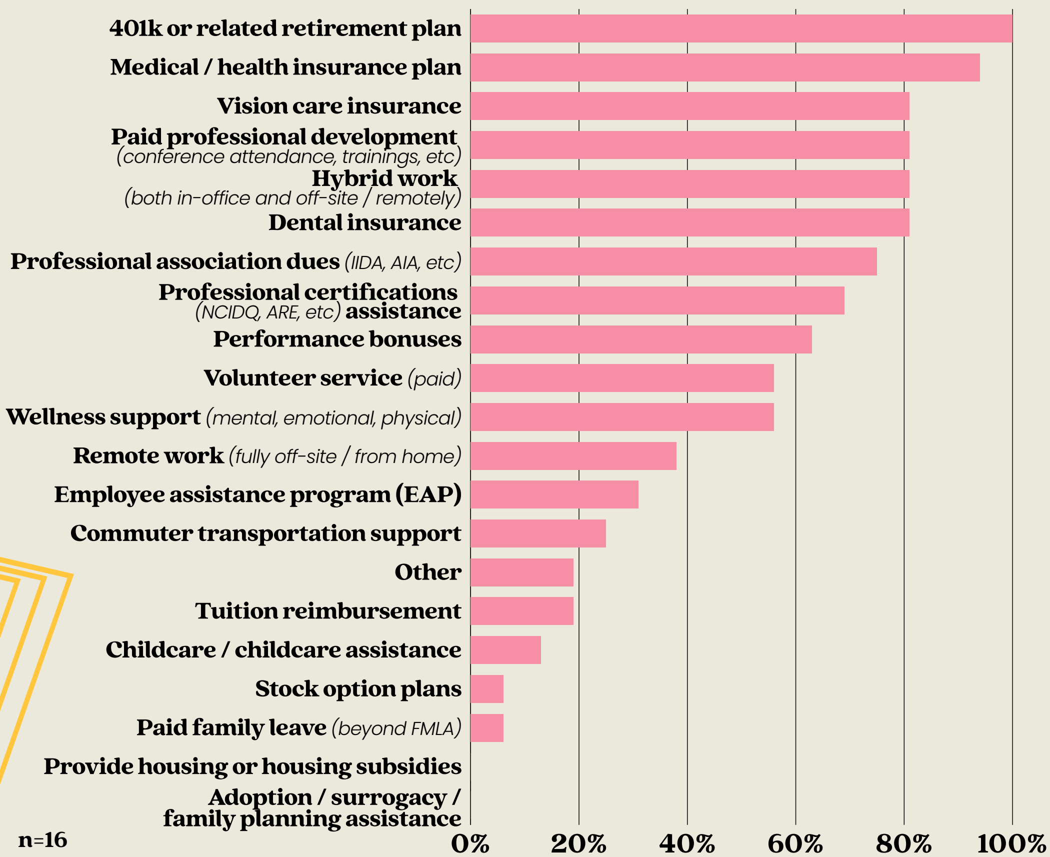
Benefits, Time Off, and Remote Work

BENEFITS OFFERED TO FULL TIME EMPLOYEES BY THEIR FIRMS

Respondents provided information about the benefits offered to full-time employees by their firms. **Offered by 100% of the firms, a 401k or related retirement plan represents the most universally provided benefit. Following closely, 94% of the firms offer a medical/health insurance plan**. Eighty-one percent of firms also provide vision care insurance, paid Professional Development (including conference attendance and training), hybrid work options, and dental insurance. Other significant benefits include professional association dues (75%) and assistance with professional certifications such as NCIDQ and ARE (69%). Additionally, 63% of firms offer performance bonuses, while 56% of firms provide both paid volunteer service and wellness support (covering mental, emotional, and physical health). Thirty-eight percent of firms offer fully remote work options and 31% provide an Employee Assistance Program (EAP). Twenty-five percent of firms also offer commuter transportation support. Less commonly provided benefits include tuition reimbursement and 'Other' benefits, each offered by 19% of firms, and just 13% provide childcare assistance. Six percent of firms also offer stock option plans and paid family leave beyond FMLA. No respondents reported receiving housing or housing subsidies, or adoption/surrogacy/family planning assistance as benefits.



The average 401k match rate is

8.95%

With employees needing

4.5

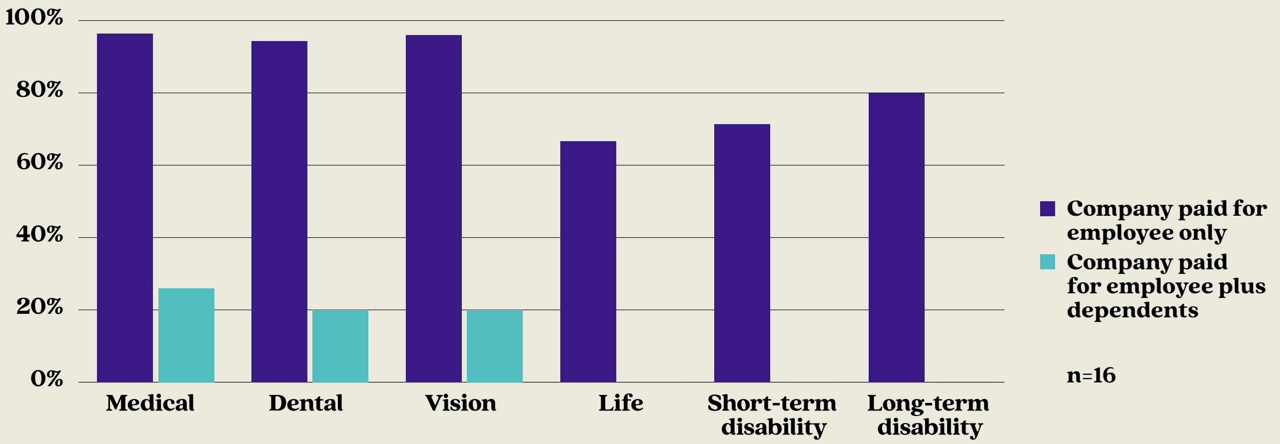
Years on average to become fully vested in their retirement plans

Among the responding firms, the average 401k match rate is 8.95%, with employees needing 4.5 years on average to become fully vested in their retirement plans. **In terms of professional membership cost coverage, firms cover an average of 94.75% of the costs. Notably, one-third of firms impose no conditions on this coverage.** However, for the remaining firms, coverage often depends on certain conditions such as holding specific titles (e.g., Associate, Principal), attending membership events, or being a member of organizations like IIDA, NOMA, ASID, SMPS, or AIA. For example, one respondent replied that 100% of costs are covered for IIDA, NOMA, ASID, and SMPS memberships, as well as National AIA memberships. Another reported full coverage for local and regional AIA memberships for Principals and Associate Principals, but only 50% coverage for Associates. Furthermore, one respondent reported 75% coverage of membership costs for untitled staff, and 100% coverage for titled staff such as Associates, Associate Principals, and Principals.

Benefits, Time Off, and Remote Work

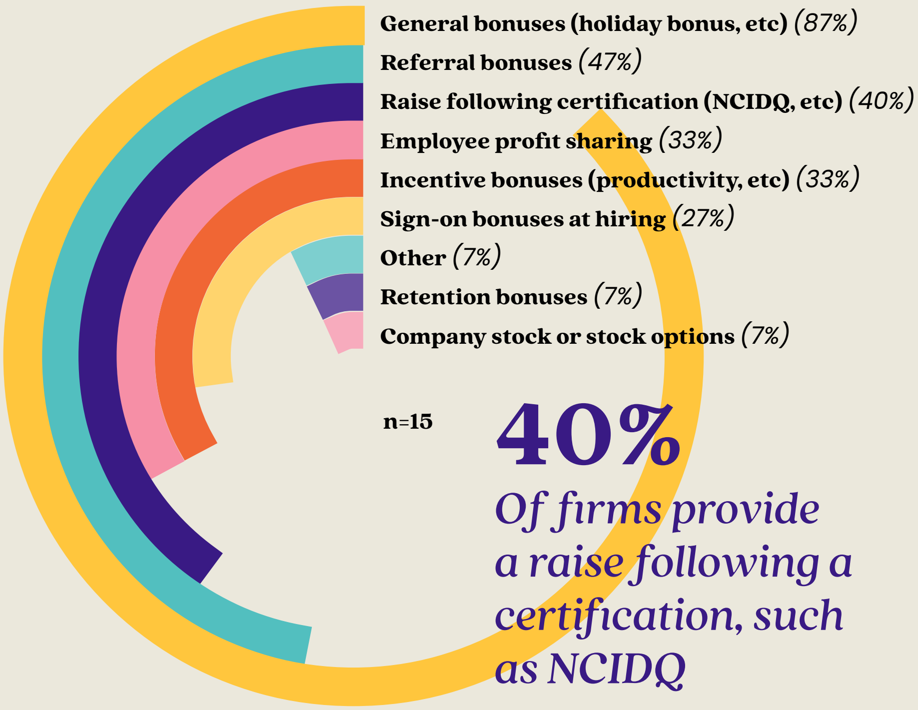
AVERAGE PERCENTAGE OF INSURANCE PREMIUMS PAID BY FIRM

Respondents indicate that their firms, on average, cover a substantial portion of insurance premiums for their employees and, to some extent, dependents. **On average, companies cover 96.4% of the medical insurance premium for employees, but only 26.0% for employees plus dependents**. Similarly, companies cover 94.4% of the dental insurance premium for employees, with a lower average of 20.0% for dependents. Vision insurance follows a similar pattern with 96.0% of the premium for employees covered on average, and 20.0% coverage for dependents. Firms cover life insurance premiums at an average rate of 66.7% but report no coverage for dependents. For short-term disability insurance, companies cover 71.4% of the premium on average for employees but provide no coverage for dependents. Employees receive long-term disability insurance at an average of 80.0%, but dependents receive no coverage.



PERCENTAGE OF FIRMS OFFERING BENEFITS TO NON-EXECUTIVE EMPLOYEES

Respondents reported that firms offer a variety of benefits to non-executive employees across firms. **The most common benefit, general bonuses, include holiday bonuses, offered by 87% of firms**. Forty-seven percent of firms offer referral bonuses, another popular benefit. **Additionally, 40% of firms provide a raise following a certification, such as NCIDQ**. Tied to productivity, 33% of firms provide employee profit sharing and incentive bonuses, and 27% of firms offer sign-on bonuses at hiring. Less common benefits include retention bonuses, company stock or stock options, and other miscellaneous benefits, each offered by 7% of firms.



40%

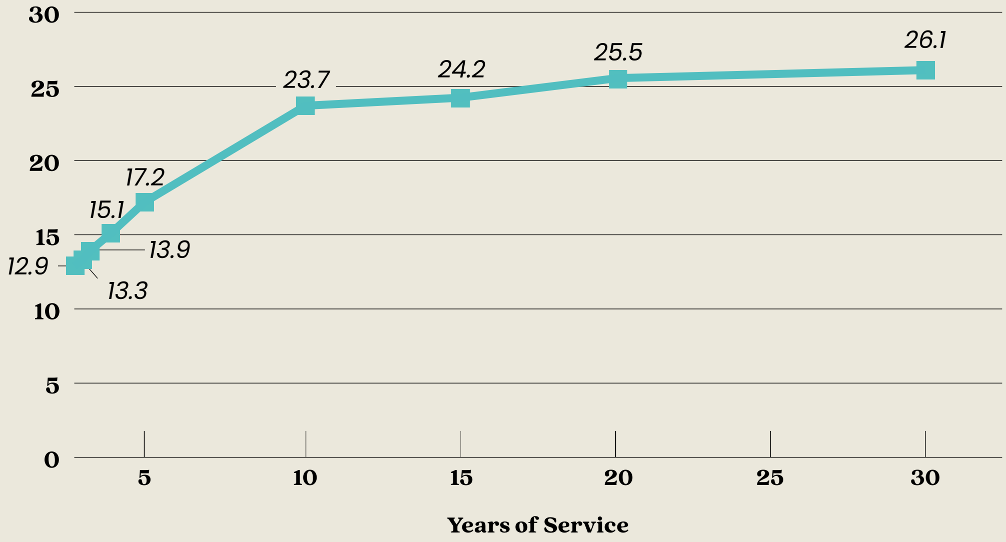
Of firms provide a raise following a certification, such as NCIDQ

Benefits, Time Off, and Remote Work

ANNUAL DAYS OF PTO OFFERED

Respondents reported that the average annual days of Paid Time Off (PTO) offered by firms gradually increase with years of service. **Upon starting their employment, employees receive an average of 12.9 days of PTO,** with only one respondent reporting their firm offering zero PTO days upon the start date. The average amount increases slightly to 13.3 days after 6 months and 13.9 days after one year of service. **Significant changes in PTO offerings occur at the 5-year and 10-year milestones, with employees receiving an average of 17.2 days and 23.7 days of PTO, respectively**. Beyond the 10-year mark, the changes in PTO become less frequent, with averages increasing to 24.2 days at 15 years, 25.5 days at 20 years, and 26.1 days at 30 years of service. Additionally, respondents report firms offer an average of 10 paid holidays per year and an average of 11 days of parental leave per year.

Firms offer an average of **10** *Paid holidays per year and an average of* **11** *Days of parental leave per year*



REMOTE AND HYBRID WORKING SCHEDULES

Respondents reported on their working arrangements, revealing that the **most employees (69%) operate under a hybrid schedule**, where they spend some days working remotely and others in the office. A smaller portion of respondents (29%) work in the office full-time, while a very small percentage (2%) are fully remote. This is a significant shift toward hybrid work from the 2021 survey results, where 21.4% were fully remote while 40.0% were hybrid.