2023 디자인산업통계

DESIGN INDUSTRY STATISTICS OF KOREA

2022년 기준
통계 보고서

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Ministry of Trade, Industry and Energy
KOREA INSTITUTE OF DESIGN PROMOTION

2023 DESIGN INDUSTRY STATISTICS OF KOREA

For Users

- This report contains the results of the **2022 Design Industry Statistics**.

- Statistics are for the **year 2022 (January 1, 2022 to December 31, 2022)**.

- The main targets of this survey are design-using companies, design-specializing companies, and central and local governments.
  - Design-using Companies : Businesses that use design among companies falling under the Design Industrial Classification (excluding design-specializing companies and public sector, education sector)
  - Design-specializing Companies : Businesses falling under the Professional Design Industry by the Standard Industrial Classification

- Year-over-year improvements include improvements to the key metrics measuring formulas and the business survey table.
  - The formulas for design industrial scale, workforce scale, and freelancer scale have changed, and details are available for users in "Improvements in the Key Metric Measuring Formulas" on pp 2-3.
  - Changes to the design-using companies, design-specializing companies, and public sector survey tables, and details are available for users in "Improvements in the Survey Tables" on pp 4-6.

- All numbers in the statistical tables are rounded, so the detailed items may not add up to match the sum.

- In the statistical tables in this report, duplicate response items have a sum of percentages greater than 100.0%.

- The symbols used in the statistical tables have the following meanings:
  [0], [0.0] : less than the unit

- If the content of this report is reprinted or translated, the phrase "Reprinted or translated from page ○ of the 2023 Design Industry Statistics General Report" must be indicated.

Improvements for this year

Ⅰ. Improvements in Key Metrics Measuring Formulas

Design Industrial Scale

▪ Background of making improvements

Issues have been emerging concerning the overlap between measuring items of the design industrial scale (design-specializing companies" revenue, design-using companies" service costs, the public sector"s design service costs, freelancers" salaries) and the appropriateness of including the public sector and higher education.

▪ Direction of improvements

The public sector"s design budget (design service costs, etc.) and freelance salaries were removed as they are part of the revenue of design-specializing companies, and higher education"s annual salaries were removed since they are not appropriate as industry-scale items.

▪ Improvements

- (Post-improvement) (Design-using companies) Design investment + (Design-specializing companies)Revenue
- (Pre-improvement) (Design-using companies) Design investment + (Design specializing companies)Revenue + (Public sector) Design department budget + (Freelancers) Annual salary + (Higher education) Design-related faculty's annual salary and design research costs

Item	Design-using companies investment	Design-specializing companies revenue	Public sector design budget	Freelancer annual salary	Higher education annual salary	Total
Post-improvement	12.9 trillion won	6.3 trillion won	-	-	-	19.3 trillion won
Pre-improvement	12.9 trillion won	6.3 trillion won	0.3 trillion won	1.0 trillion won	0.3 trillion won	20.9 trillion won

* Based on 2023 Design Industry Statistics

Design Workforce Scale

▪ Background of making improvements

Issues have been emerging concerning the overlap between measuring items of the design workforce scale (design-specializing companies" number of designers, number of freelance desginers) and the appropriateness of including the public sector and higher education.

▪ Direction of improvements

The number of freelance designers was removed as they are part of the design-specializing companies" number of designers, and the number of public sector design department employees and number of higher education design department faculty were removed since they are not appropriate as workforce scale items.

▪ Improvements

- (Post-improvement) (Design-using companies) Number of designers + (Design-specializing companies) Number of designers
- (Pre-improvement) (Design-using companies) Number of designers + (Design-specializing companies) Number of designers + (Public sector) Number of design department employees + (Freelancers) Number of designers without employees + (Higher education) Number of design department faculty

Item	Using companies Number of designers	Specializing companies Number of designers	Public Sector Number of design department employees	Freelancer Number of designers	Higher education Number of design department faculty	Total
Post-improvement	279,733	32,279	-	-	-	312K
Pre-improvement	279,733	32,279	470	43,714	2,228	358K

* Based on 2023 Design Industry Statistics

Freelancer Scale

▪ Background of making improvements

Starting in 2022, nonstore businesses (such as freelancers) have been included in the survey, increasing the overlap between solo design-specializing companies and freelancers, and the need to simplify the freelance measuring formula.

▪ Direction of improvements

To simplify metrics measuring formulas by calculating only from the regional employment survey (National Statistics Office) statistics

▪ Improvements

Item	Measuring formulas
Post-improvement	Self-employed designers without employees
Pre-improvement	{(Design-using companies) Number of designers + (Design-specializing companies) Number of employees} x Percentage of freelancers - One-person nonstore design-specializing companies

Ⅱ. Improvements in Survey Tables

Design-using Companies

Survey Items	Year-over-year Changes
Basic business status	• **Complementing view items** - Deleted “Detailed industry (sector/industry/product),” “Financial statements preparation status,” and “Status of externally audited company” - Added "main products and product services" and "women-owned business status” • **Reason for complementation** - Complemented the view items to expand the use of results
Percentage by type of design services contract and Satisfaction by contract type	• **Developing new items** - Added an item to identify the contract type for design services (project unit, annual contract) - Added quality satisfaction items by contract type • **Reason for development** - Developed items to reflect the latest trends in the design industry (more annual contracts)
Factors that affect revenue	• **Complementing items** - Factors that affect product (service) sales → Factors that affect revenue • **Complementing view items** - “Product Brand” → “ Brand” - “Performance” → “Product Performance” • **Reason for complementation** - Complemented the items common to product and service providers
New product (service) development process In-house designer/Design-specializing company /Freelancer involvement step	• **Complementing view items** - Added a new "Freelance designer involvement step” • **Reason for improvement** - Improved the item to reflect recent trends in the design industry (e.g., the growing number of freelancers)
Retired designer tenure	• **Developing a new item** - Added the item "Tenure of designers who retired in the survey year” • **Reason for development** - Developed the item to identify when the business lost a designer
Design trends	• **Developing new items** - Added "New technology use cases for design work” - Added "Extent to which green elements are considered in design development” - Added "Challenges in developing designs with green elements” • **Reason for development** - Developed items that reflect the latest trends in the design industry (digital, green convergence, etc.)
COVID-19-related items	• **Deleting items** - Deleted the item “Business changes due to COVID-19” - Deleted the item “Changes in the percentage of design-using fields due to COVID-19 - Deleted the item "COVID-19 impact" - Deleted the item "Reason for decreasing design investments due to COVID-19” • **Reason for deletion** - Deleted relevant items as COVID-19 impact decreases

※ The full 2023 Design-using Companies Survey Table is available in the appendix on page 123.

Design-specializing Companies

Survey Items	Year-over-year Changes
Basic business status	• **Complementing view items** - Deleted “Detailed industry,” “Financial statements preparation status,” and “Status of externally audited company” - “Key products and product services sold,” “Type of address (whether it’s a business in the household),” “Status of being a female-owned business” • **Reason for complementation** - Complemented the view items to expand the use of results
Retired designer tenure	• **Developing a new item** - Added the item "Tenure of designers who retired in the survey year” • **Reasons for development** - Developed the item to identify when the business lost a designer
Expenditure status of business costs	• **Complementing view items** - “Design-specializing companies service costs” → “Design service costs” - “Additional service costs” → “Other service costs” • **Reason for complementation** - Complemented the view items to improve the clarity of business costs expenditure item
Percentage by type of design services contract and Satisfaction by contract type	• **Developing new items** - Added an item to identify the contract type for design services (project unit, annual contract) - Added quality satisfaction items by contract type • **Reason for development** - Developed items to reflect the latest trends in the design industry (more annual contracts)
Methods of discovering overseas buyers and clients	• **Developing a new item** - Added the item "Methods of discovering overseas buyers and clients," for companies doing business overseas • **Reason for development** - Developed the item to identify the details of overseas business methods
Reasons not to expand overseas	• **Developing a new item** - Added the item "Reasons not to expand overseas" for companies that do not conduct overseas business • **Reason for development** - Developed the item to identify the reasons for not conducting overseas business
Design trends	• **Developing new items** - Added "New technology use cases for design work” - Added "Extent to which green elements are considered in design development” - Added "Challenges in developing designs with green elements” • **Reason for development** - Develop items that reflect the latest trends in the design industry (digital, green convergence, etc.)
Participating overseas exhibitions and countries	• **Deleting a view item** - Deleted the item "Status of participating overseas exhibitions and countries, the desire to participate” • **Reason for deletion** - Deleted the item due to low response rates
COVID-19-related items	• **Deleting items** - Deleted the item “Business changes due to COVID-19” - Deleted the item “Changes in the percentage of design-using fields due to COVID-19 - Deleted the item "COVID-19 impact" - Deleted the item "Reason for decreasing design investments due to COVID-19” • **Reason for deletion** - Deleted relevant items as COVID-19 impact decreases

※ The full 2023 Design-specializing Company Survey Table is available in the appendix on page 134.

Public Sector

Survey Items	Year-over-year Changes
Design-using Fields	• **Complementing view items** - Added “Roadmap development,” “Public goods,” and “Exhibition PR materials” - Improved descriptions of “Managed facilities” and “Pedestrian and safety services” • **Reason for complementation** - Complemented the view items to subdivide design-using fields and for better clarity

※ The full 2023 Public Sector Survey Table is available in the appendix on page 145.

DESIGN
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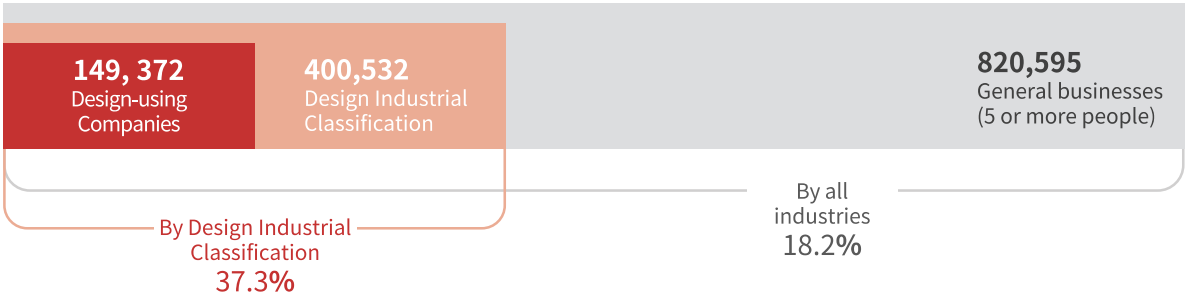
Medical Instrumentation
Application and Design

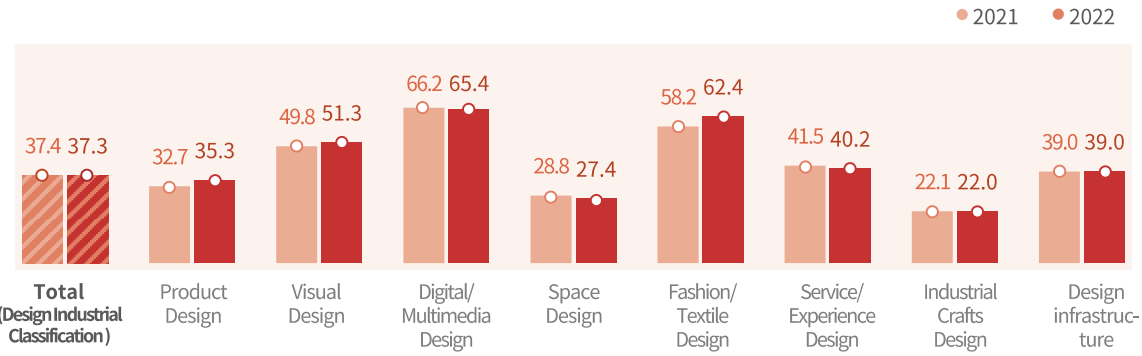
1. Design-using Rate

Status of Design Use

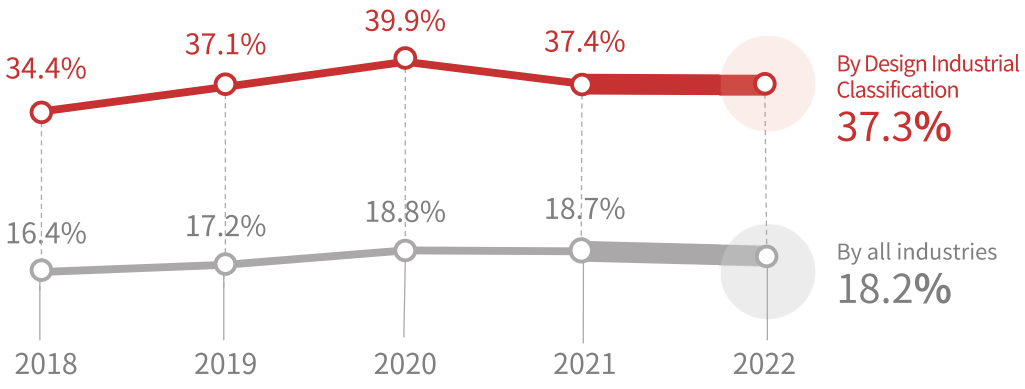
’22
149,372 companies



Design-using Rate by Industry
(based on Design Industrial Classification)



Trends of the Design-using Rate
(Unit : %)



2. Scale of the Design Industry & Workforce

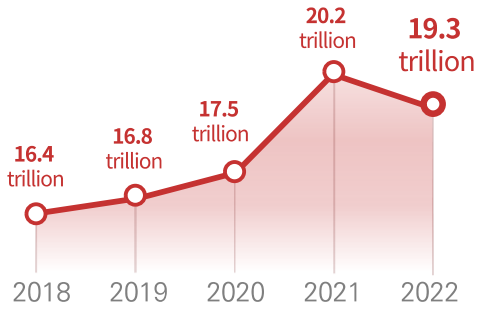
Design Industrial Scale

₩19.3 trillion
(₩20.2 trillion in '21)

Design-using Companies
₩12.9446 trillion — 67.2%

Design-specializing Companies
₩6.3271 trillion — 32.8%

Trends of the Industrial Scale
(Unit : trillion won)



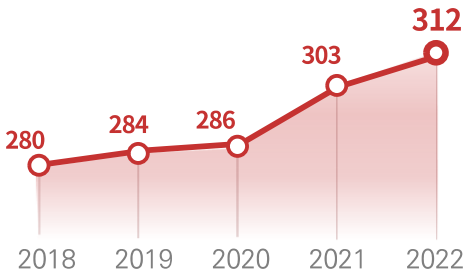
Design Workforce Scale

312K people
(₩30.3 trillion in '21)

Design-using Companies
279,773 people — 89.7%

Design-specializing Companies
32,279 people — 10.3%

Trends of the Workforce Scale
(Unit : K people)



Reference Statistics

Public Sector	**₩296.7 billion** ’21 ₩233 billion	**470 people** ’21 655 people
Freelancer	**₩1.0235 trillion** ’21 ₩996.5 billion	**43,297 people** ’21 42,155 people
Education Sector	**₩272.1 billion** ’21 ₩265.4 billion	**2,228 people** ’21 2,237 people

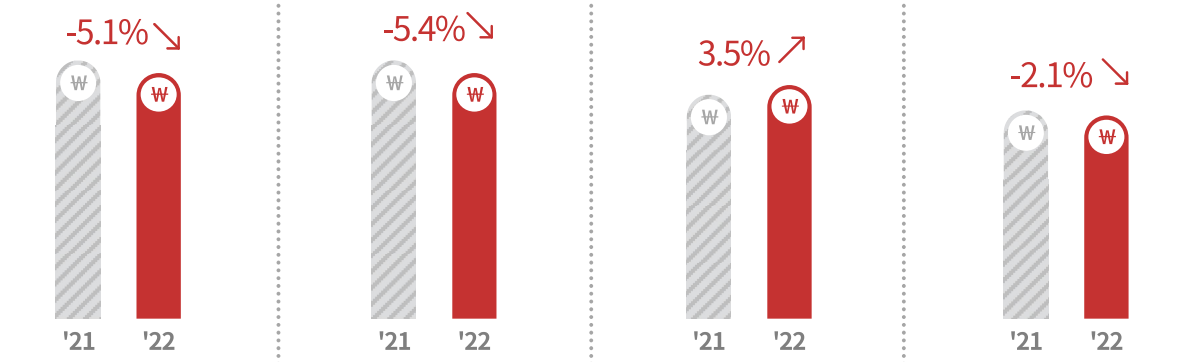
3. Industrial Scale of Design-using Companies

Industrial Scale of Design-using Companies

2021
₩13.3501 trillion
(₩88.13 million on average)

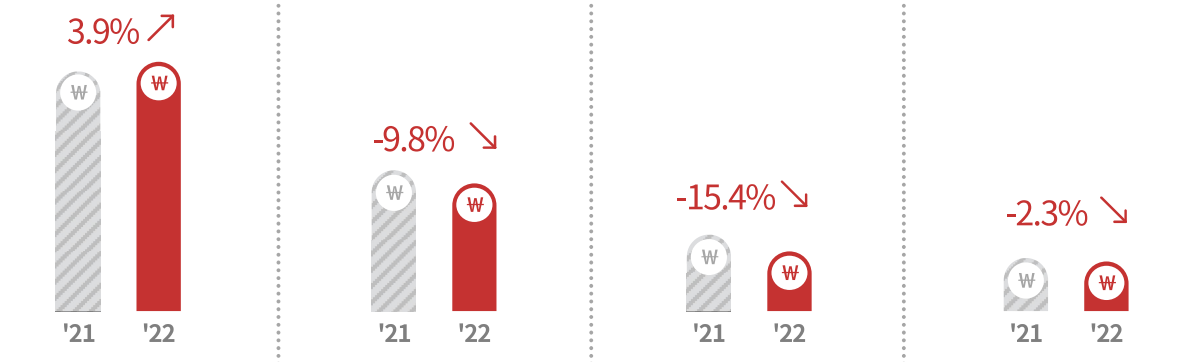
2022
₩12.9446 trillion
(₩86.66 million on average)

Industrial scale by industry
(Unit : trillion won)



Product Design	Design Infrastructure	Service/Experience Design	Space Design
₩2.7906 trillion	₩2.7726 trillion	₩2.6556 trillion	₩2.3116 trillion

Industrial scale by scale
(Unit : trillion won)



Small enterprise	Medium enterprise	Large enterprise	Middle market enterprise
₩7.1082 trillion	₩3.6194 trillion	₩1.4493 trillion	₩0.7677 trillion

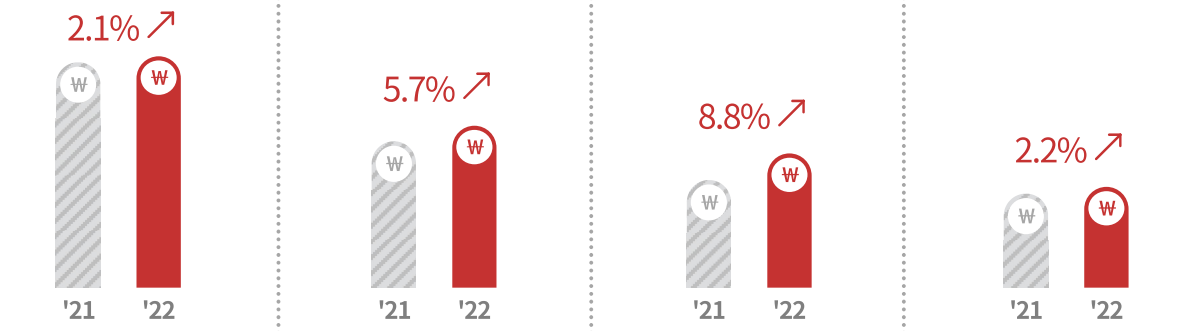
4. Workforce Scale of Design-using Companies

Workforce Scale of Design-using Companies

2021
271,230 people
(1.79 people on average)

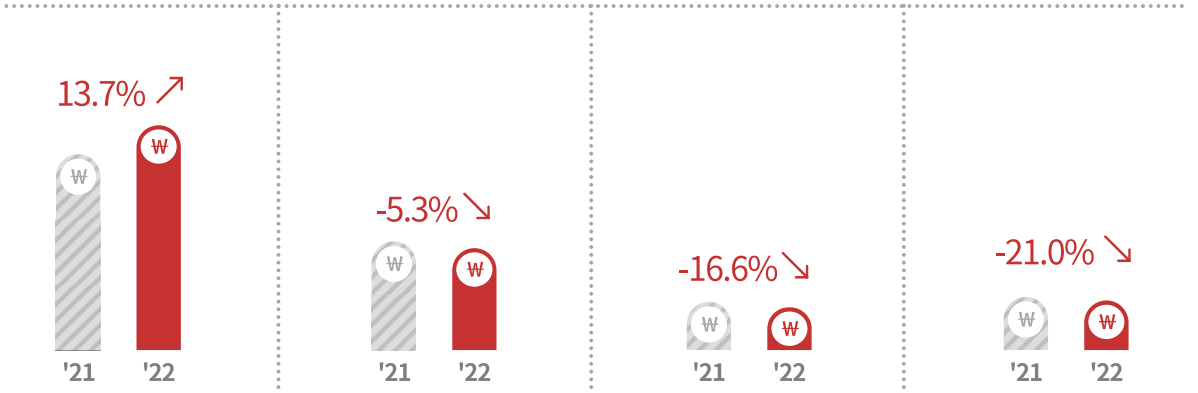
2022
279,773 people
(1.87 people on average)

Workforce scale by industry
(Unit : people)



Design Infrastructure	Space Design	Service/Experience Design	Product Design
69,653 people	57,710 people	52,497 people	46,811 people

Workforce scale by scale
(Unit : people)



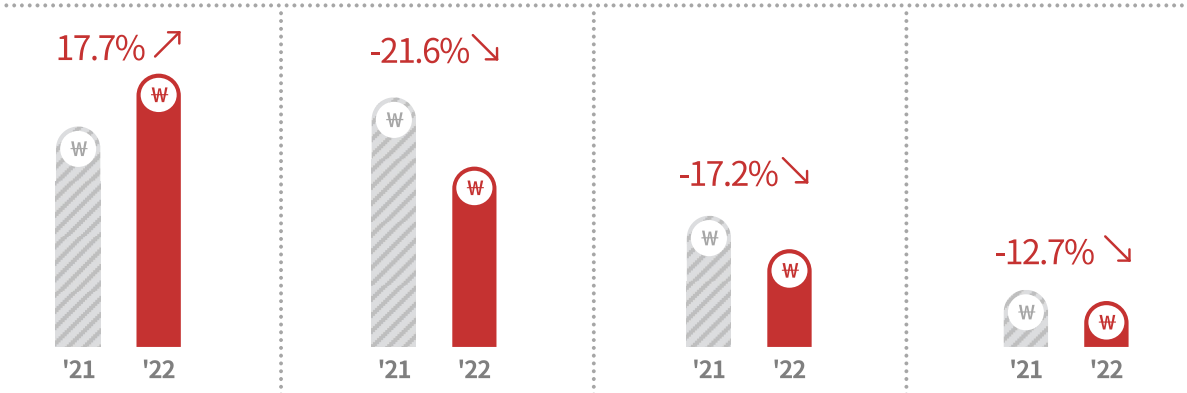
Small enterprise	Medium enterprise	Large enterprise	Middle market enterprise
170,377 people	77,444 people	17,836 people	14,116 people

5. Industrial & Workforce Scale of Design-specializing Companies

Industrial Scale of Design-specializing Companies

2021
₩6.822 trillion
(₩350.48 million on average)

2022
₩6.3271 trillion
(₩311.83 million on average)



Visual Design
₩2.5182 trillion

Interior Design
₩1.8483 trillion

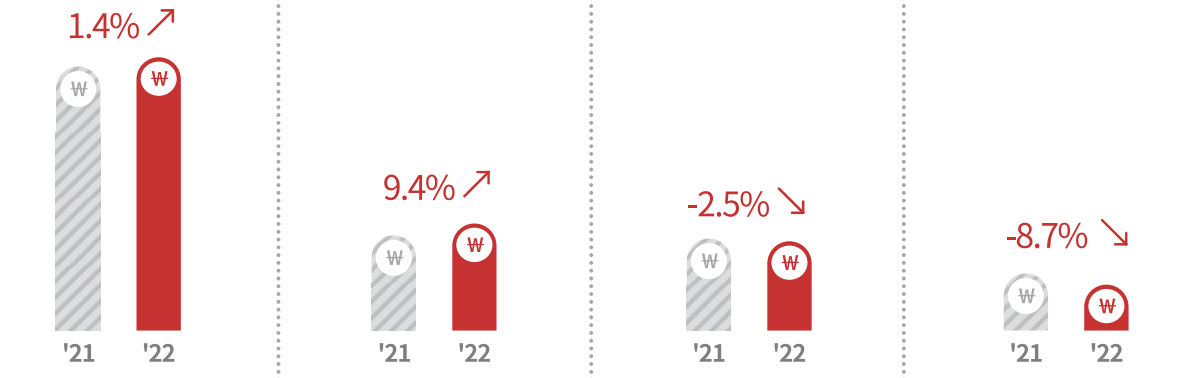
Product Design
₩1.222 trillion

Fashion, Textiles & Other
₩0.739 trillion

Workforce Scale of Design-specializing Companies

2021
31,888 people
(1.64 on average)

2022
32,279 people
(1.59 on average)



Visual Design
16,196 people

Interior Design
7,039 people

Product Design
6,032 people

Fashion, Textiles & Other
3,013 people

6. Scale of Public Sector

Public Sector's Design Department Budget

2022
₩248.7 billion
₩233 billion in '21

Central Government Design Budget
₩102.1 billion

Local Government Design Budget
₩146.6 billion

Public Sector 's Design Department Workforce

2022
470 people
(655 people in '21)

Central Government Design Workforce
32 people

Local Government Design Workforce
438 people

Central Government

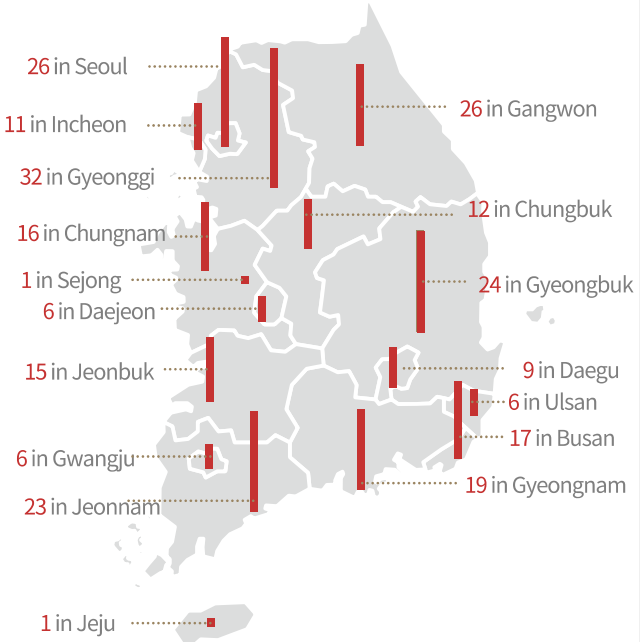
18 Ministries
Ministry of Employment and Labor, Ministry of Science and ICT, Ministry of Education, Ministry of Land, Infrastructure, and Transport, Ministry of Economy and Finance, Ministry of Agriculture, Food and Rural Affairs, Ministry of Culture, Sports and Tourism, Ministry of Justice, Ministry of Health and Welfare, Ministry of Trade, Industry and Energy, Ministry of Gender Equality and Family, Ministry of Foreign Affairs, Ministry of Unification, Ministry of Public Administration and Security, Ministry of Environment

4 Ministries
Ministry of Justice, Ministry of Food and Drug Safety, Ministry of Human Resources and Innovation, Ministry of SMEs and Startups

18 Administration, Agency, Service, Office
Prosecutor's Office, National Police Service, Customs Service, National Tax Service, Korea Meteorological Administration, Rural Development Administration, Cultural Heritage Administration, Defense Acquisition Program Administration, Military Police Service, Forest Service, Saemangeum Development and Investment Agency, Fire Service, Public Procurement Service, Korea Centers for Disease Control and Prevention, Korea Statistics Service, Korean Intellectual Property Office, Korea Coast Guard, Korea Administrative Complex Construction Agency

36 Completed of survey | **40**

Local Governments



230 Completed of survey | **243**

7. Scale of Freelancers

Number of Freelance Designers

2022

43,297 people

(42,155 people in '21)

Designer (Code 285) Status from the Regional Employment Survey Results of the Latter Half of '22

Self-employed without employees

43,297 people (17.5%)

Other than the self-employed without employees

(commercial, temporary, and daily laborers, and self-employed with employees, unpaid family workers

204,023 people (82.5%)

Freelance Designers' Market Scale

2022

₩1.0235 trillion

(₩996.5 billion in '21)

Number of Freelance Designers

43,297 people

Average monthly wage of the self-employed without employees among designers

₩1,970,000

12 months

8. Scale of Higher Education

Annual Salary of Design Department Faculty, etc.

2022

₩272.1 billion

(₩265.4 billion in '21)

Annual Salary of Design Department Faculty

₩245.1 billion in '22

(4-year College) Design Department's Research Cost

₩25.2 billion

(Community College) Design Department's Research Cost

₩1.8 billion

Number of Design Department Faculty

2022

2,228 people

(2,237 people in '21)

Number of Design Department Faculty

The sum of the number of full-time professors, associate professors, assistant professors, and non-full-time faculty at four-year colleges (graduate schools) and community colleges

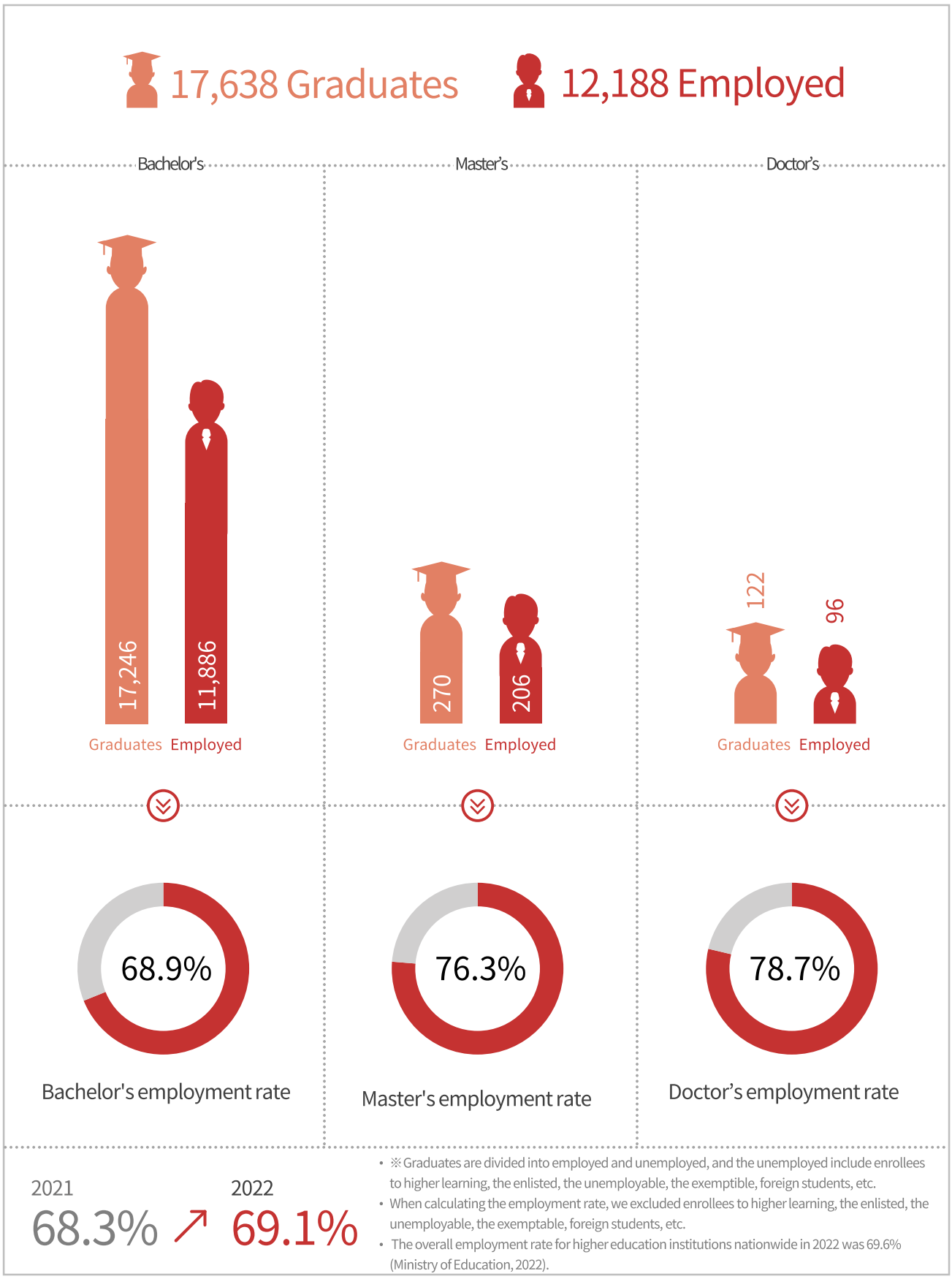
4-Year Colleges	2021	1,527
	2022	1,534
Community Colleges	2021	710
	2022	694

2,237 people in '21

2,228 people in '22

– 9 people

9. Employment Rate



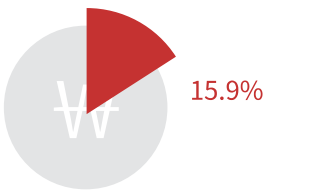
10. Economic Value of Design

Economic Value of Design

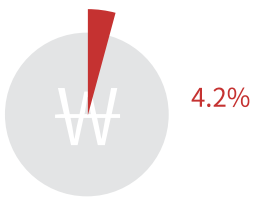
₩178.4 trillion (₩159.7 trillion in '21)

Economic value of design = Revenue of businesses in the Design Industrial Classification x Ratio of value-added x Design contribution

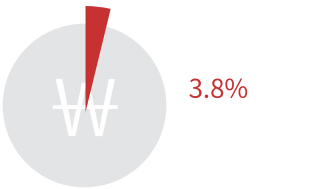
Product Design
₩28.4 trillion



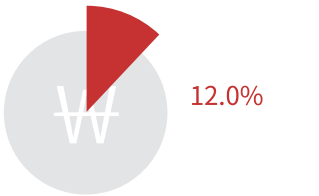
Visual Design
₩7.6 trillion



Digital/Multimedia Design
₩6.8 trillion

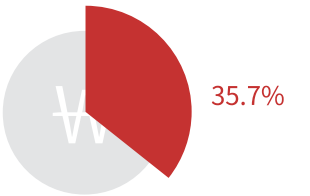


Space Design
₩21.5 trillion

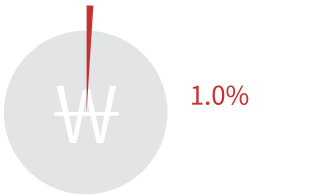


Fashion/Textile Design
₩2.2 trillion

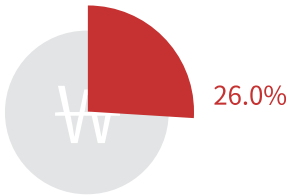
Service/Experience Design
₩63.7 trillion



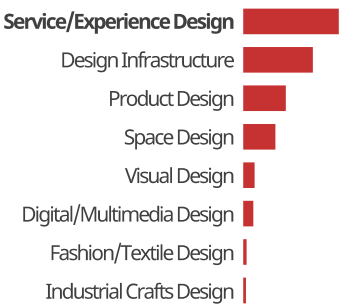
Industrial Crafts Design
₩1.8 trillion



Design Infrastructure
₩46.4 trillion



Economic Value Ranking in the Design Classification



DESIGN INDUSTRY STATISTICS OF KOREA

Part. 1

Outline of Survey

DESIGN
INDUSTRY
STATISTICS
OF KOREA

01 Survey Design

1. Survey Purpose

- The purpose is to establish objective and reliable data to determine the current state of the design industry, respond to user demand, and provide basic data for establishing design policies and strategies for the government, industry, academia, etc.

2. Survey Basis

- Article 20, paragraph 3 of the Enforcement Decree of the Industrial Design Promotion Act
- Approval statistics under Article 18 of the Statistics Act (No. 115026)

3. Survey History

- 1997 : Conducted the Design Census Study and the first Design Industry Statistics Survey in Korea
- 2002 : Conducted the 2nd Design Census Study
- 2005 : Conducted the 2005 Design Industry Statistics of Korea, changed the statistical name; the survey is changed to a biennial survey
- 2007 : Conducted the 2007 Design Industry Statistics of Korea, changed the statistical name, and designated the survey as nationally recognized statistics
- 2009 : Conducted 2009 Design Industry Statistics of Korea
- 2011 : Conducted 2011 Design Industry Statistics of Korea
- 2013 : Conducted the 2013 Design Industry Statistics of Korea, changed to an annual survey, established the special classification of design industry (8 major classifications), and approved changes to national statistics
- 2014 : Conducted the 2014 Design Industry Statistics of Korea
- 2015 : Conducted the 2015 Design Industry Statistics of Korea
- 2016 : Conducted the 2016 Design Industry Statistics of Korea
- 2017 : Conducted the 2017 Design Industry Statistics of Korea
- 2018 : Conducted the 2018 Design Industry Statistics of Korea
- 2019 : Conducted the 2019 Design Industry Statistics of Korea and a regular quality check of national statistics
- 2020 : Conducted the 2020 Design Industry Statistics of Korea and changed the statistical name
- 2021 : Conducted the 2021 Design Industry Statistics of Korea
- 2022 : Conducted the 2022 Design Industry Statistics of Korea and changed the statistical name
- 2023 : Conducted the 2023 Design Industry Statistics of Korea, changed key index measurement formula

4. Survey Period and Target Period

▪ Survey Duration

General and Companies utilizing design : 2023. 10. 10. ~ 2023. 11. 30.
Specialized Design Companies : 2023. 10. 10. ~ 2023. 12. 12.
Public sector : 2023. 09. 25. ~ 2023. 12. 12.

▪ Survey target period : 2022. 01. 01. ~ 2022. 12. 31.

5. Survey Target and Scope

Survey	Desk Research
• Investigate the design use of general companies • Survey of Companies utilizing design among general companies • Survey of Specialized Design Companies • Survey of the central administration and local governments	• The status of design-related education facilities • Estimate the economic value of design - Calculate the value-added ratio by the Design Industrial Classification

6. Survey Items

Item	Details	
Survey of design utilization	• Design department status as of December 2022 • Working status of designers as of December 2022 • Experience with commissioning Specialized Design Companies or freelancers for design development within the recent two years • Status of being a middle market enterprise	
Companies utilizing design status Survey	• General status of the business • Design investment performance • Design stature and contributions • Government policy and demand for support • Design trend related questions	• Status of design use • Design utilization level • Design workforce status • The status of design education
Specialized Design Companies status Survey	• General status of the business • Design business performance • The status of design education • Design trend related questions	• Status of key fields of design and workforce • Design international exchange • Government policy and demand for support
Public Sector	• Status of design use • Related to design education	• Status of design project orders

7. Population and Survey Sample

Item	Populations	Survey sample	Sample ratio (%)
Survey of general companies' use(a)	405,491	20,835	5.1%
Survey	151,477	1,882	1.2%
Specialized Design Companies(b)	19,465	626	3.2%
Public Sector(c)	283	264	93.3%
Total(a+b+c)	425,239	21,725	5.1%

8. Overview of Sample Design by Survey Target

▪ Survey Methods : Combined visiting surveys and email/fax/phone surveys

Item	Sampling methods	Target sample size	Number of completed surveys
Companies utilizing design' utilization status and survey	• Two-phase sampling • [Primary] Design utilization survey -Stratified sampling/modified proportional allocation • [Secondary] Survey of Companies utilizing design among general companies - Stratified sampling/modified proportional allocation	• [Primary] Design utilization survey - 20,000 companies • [Secondary] Survey of Companies utilizing design - 1,800 companies	• [Primary] Design utilization survey - 20,437 companies • [Secondary] Survey of Companies utilizing design - 1,886 companies
	• Creating survey Questionnaire : Business owners or managers and higher-level staff and employees in charge of designing		
Specialized Design Companies Survey	• Stratified sampling • Modified proportional allocation	• 600 companies	• 623 companies completed
	• Creating survey tables : Business owners or managers and higher-level staff		
Public Sector Survey	• Complete enumeration	• Central administration (18 ministries, 4 ministries, and 18 administrations, agencies, services, offices) - All 40 institutions • Local governments (administrative cities/autonomous regions) - All 243 agencies	• Central administration (18 ministries, 4 ministries, and 18 administrations, agencies, services, offices) - 36 organizations completed • Local governments (administrative cities/autonomous regions) - 230 organizations completed
	• Public officials in charge of design duty		

02 Concepts and Terminology

1. General Companies

- Businesses with 5 or more workers corresponding to the Design Industrial Classification according to the 2021 Nationwide Business Survey*

* Population data should use the same 2022 data as the survey base year, but the most recent Nationwide Business Survey data available (2021) from Statistics Korea were used.

2. Companies utilizing design

- Businesses identified as using design among general companies in the survey of design use

3. Stage of Identifying Companies utilizing design

- General companies are judged by whether they have a “design department,” “hire a designer,” or “outsource to a Specialized Design Companies,” and the verification process follows the stages below.

Step 1 Does your company have **a design department** as of December 2022?

☑ YES ▶ Companies Utilizing Design ☐ NO

Step 2 **Is a designer working as an employee** in your company as of December 2022? Or is there **a designer currently working** as an employee at your company?

☑ YES ▶ Companies Utilizing Design ☐ NO

Step 3 Does your company have the experience of commissioning service to **a specialized design** company or **freelancer** for your business or promotion of the company during 2021 and 2022?

☑ YES ▶ Companies Utilizing Design ☐ NO

▶ Go to Step 4 if answering “NO” to all Steps 1-3

Step 4 Does your business have the experience of releasing new products or changing the design of an existing product in the recent two years?

☑ YES ▶ Step 5 ☐ NO ▶ Company not using design
→End the survey of utilization

▶ Go to Step 5 if having the experience of releasing new products or changing designs

Step 5 What kind of methods(in-house, outsourcing) did you use to design the new product or change designs?

☑ Subjective response, listen to the response of the responder and then determine whether the company uses design by referring to the design use classification criteria below and apply to Step 1-3 questions

4. Designer

- Among those hired as designers, one who studied a design-related major or has a certificate related to design work, or one who did not study design-related major or has a certificate but has at least two years of experience in design work

5. Specialized Design Companies

- Businesses corresponding to the professional design industry in the 2021 Nationwide Business Survey
- Specialized Design Companies are composed of 1 group, 1 class, and 4 sub-classes based on the (10th) Korean Standard Industrial Classification.
- The 4 sub-classes were matched 1:1 with the 4 groups of the Design Industrial Classification

[Sectio] M. Professional, scientific, and technical services
- **[Divisio]** 73. Other professional, scientific, and technical services
  - **[Group]** 732. Professional design industry
    - **[Class]** Professional design industry
      - **[Sub-Class]**
        - 73201. Interior Design Industry (= Design Industrial Classification 4-10-1),
        - 73202. Product Design Industry (= Design Industrial Classification 1-7-1),
        - 73203. Visual Design Industry (= Design Industrial Classification 2-5-6),
        - 72309. Fashion, textile and other specialized design industries (= Design Industrial Classification 5-5-1)

6. Korean Standard Industrial Classification

- The Korean Standard Industrial Classification is a classification for statistical purposes based on the International Standard Industrial Classification (ISIC) recommended by the United Nations (UN) to ensure the accuracy of statistical data and comparability between countries in accordance with the Statistics Act.
- Consists of (21) sections - (77) divisions - (232) groups - (495) classes - (1,196) sub-classes (based on the 10th classification)

7. Design Industrial Classification (Korean Standard Industrial Classification's Matching Table is in the Appendix)

- Design Industrial Classification is a special classification established for design promotion strategy and industry size and statistics calculation by classifying design-related industries and Specialized Design Companies into large, medium, and small among the Korean Standard Industrial Classification.
- Design Industrial Classification is composed of (8) sections, (42) divisions, and (154) groups (including 4 Specialized Design Companies industries)
- The Design Industrial Classification was first established in 2013 and has been used to design surveys and produce results ever since

8. Corporate Type

- Sole proprietorship
  - A business run by an individual without a corporate body (including a business run jointly by individuals)
  - A sole proprietorship that has a sales contract with a company for products, goods, etc. and is managed independently under the responsibility of the sole proprietor
- Incorporated company
  - A for-profit corporation established under the provisions of the Commercial Act, including a joint stock company, limited liability company, partnership, merged company, and foreign company
  - A foreign company is a company headquartered in a foreign country and established in Korea, including branch (offices), sales offices, etc. established in Korea
- Non-company corporations
  - Corporations other than companies established under the provisions of the Civil Act or special laws, such as foundations, corporations, school corporations, medical corporations, social welfare corporations, and various public corporations
- Unincorporated associations
  - Various societies, unions, sponsorships, cultural organizations, labor organizations, etc. without legal status

9. Business Entity Classification

- Sole proprietorship (1 corporation, 1 business)
  - When there is only one business in one location with no headquarters (office) or branch (offices), sales offices, or field offices in other locations
- Headquarters (office), head office, central association (1 company multi-businesses)
  - A business that has one or more branch (offices), sales offices, field offices, etc. under the same management and substantially oversees the entire business
  - A business that actually performs general management tasks such as planning, accounting, finance, purchasing, advertising, judicial affairs, etc.
- Branch (offices), field offices, sales offices (1 company multi-businesses)
  - Branch (offices), sales offices, field offices, etc. that have a separate headquarters, etc. that oversees the same management and receives instructions from the headquarters, etc. on all aspects of business.

10. Worker Classification

- Regular worker
  - A person who has an employment contract with a business for one year or more, or a person who is subject to personnel management regulations or receives various benefits such as bonuses without an employment contract for a certain period of time
- Temporary and day-to-day workers
  - A person whose employment contract is for less than one year and who is paid by the business

11. Business Performance

- Revenue : Total revenue from business activities for full year of 2022
- Labor cost : Includes allowances and commissions paid to other workers as labor costs, such as salaries, fringe benefits, and allowance for severance and retirement benefits, for the full year of 2022
- R&D cost : The sum of research, development, and general development expenses
- Operating profit : Profit of excluding operating expenses from the total revenue

12. Business Size Classification Method

- Article 2 of the Framework Act on Small and Medium Enterprises categorizes business size into medium and small enterprises based on industry and revenue
- Middle market enterprises were identified by a questionnaire during the survey stage of checking the use of general companies

Industry		Medium enterprise	Small enterprise	Large enterprises
Manufacturing	Other machinery and equipment manufacturing industry	12–10 billion won or less	12 billion won or less	Apart from medium and small enterprises, others are categorized as large enterprises
	Metal processing products manufacturing industry (excluding machinery and furniture manufacturing industry)	12–10 billion won or less	12 billion won or less	
	Food manufacturing industry	12–10 billion won or less	12 billion won or less	
	Automotive and trailer manufacturing industry	12–10 billion won or less	12 billion won or less	
	Electronics, computer, video, audio and telecommunications equipment manufacturing industry	12–10 billion won or less	12 billion won or less	
	Cokes, briquettes, and petroleum refinery manufacturing industry	12–10 billion won or less	12 billion won or less	
	Chemicals and chemical product manufacturing industry(excluding drug manufacturing industry)	12–10 billion won or less	12 billion won or less	
	Primary metal manufacturing industry	12–150 billion won or less	12 billion won or less	
	Furniture manufacturing industry	12–150 billion won or less	12 billion won or less	
	Leather, bag, and shoe manufacturing industry	12–150 billion won or less	12 billion won or less	
	Apparel, apparel accessories, and fur products manufacturing industry	12–150 billion won or less	12 billion won or less	
	Electrical equipment manufacturing industry	12–150 billion won or less	12 billion won or less	
	Nonmetallic mineral products manufacturing industry	12–80 billion won or less	12 billion won or less	
	Beverage manufacturing industry	12–80 billion won or less	12 billion won or less	
	Medical substance and drug manufacturing industry	12–80 billion won or less	12 billion won or less	
	Rubber and plastic product manufacturing industry	8-100 billion won or less	8 billion won or less	
	Other transportation equipment manufacturing industry	8-100 billion won or less	8 billion won or less	
	Tobacco manufacturing industry	8-100 billion won or less	8 billion won or less	
	Lumber and wooden product manufacturing industry (excluding furniture manufacturing industry)	8-100 billion won or less	8 billion won or less	

	Textile products manufacturing industry (excluding apparel manufacturing industry)	8-100 billion won or less	8 billion won or less	
	Pulp, paper, and paper products manufacturing industry	8–150 billion won or less	8 billion won or less	
	Other product manufacturing industry	8–80 billion won or less	8 billion won or less	
Others apart from manufacturing	Medical, precision, optical device and watchmaking manufacturing industry	8–80 billion won or less	8 billion won or less	
	Print and recorded media reproduction industry	8–80 billion won or less	8 billion won or less	
	Electric, gas, steam, and water utilities industry	12–100 billion won or less	12 billion won or less	
	Construction industry	8-100 billion won or less	8 billion won or less	
	Mining industry	8-100 billion won or less	8 billion won or less	
	Agriculture/Forestry/Fishing industry	8-100 billion won or less	8 billion won or less	
	Transportation industry	8–80 billion won or less	8 billion won or less	
	Sewage waste treatment, raw material recycling, and environmental restoration industry	8–80 billion won or less	3 billion won or less	
	Finance/Insurance industry	8–40 billion won or less	8 billion won or less	
	Wholesale and retail industry	5–100 billion won or less	5 billion won or less	
	Publishing/video/broadcasting and information services industry	5–80 billion won or less	5 billion won or less	
	Real estate/rental industry	3–40 billion won or less	3 billion won or less	
	Business facilities management and business support services industry	3–60 billion won or less	3 billion won or less	
	Arts/Sports & Leisure-related services industry	3–60 billion won or less	3 billion won or less	
	Specialized scientific and technical services industry	3–60 billion won or less	3 billion won or less	
	Healthcare/Social services industry	1–60 billion won or less	1 billion won or less	
	Repair and other personal service industries industry	1–60 billion won or less	1 billion won or less	
	Education Service industry	1-40 billion won or less	1 billion won or less	
	Accommodations and restaurants	1-40 billion won or less	1 billion won or less	
	Public administration, defense and social security administration*	50-299 people or less	49 people or less	

* In the case of public administration, national defense, and social security administration, the Framework Act on Small and Medium Enterprises does not have criteria to classify enterprises. Thus, they are classified based on the number of workers in the same way that size was classified based on the number of workers in the past.

13. Design-related Investment Amount and Business Expenses

- Design labor cost
  - The labor cost of designers hired for the full year of 2022
- Design service cost
  - Design service cost for 2022(design service cost not owned technology)
- Other service cost
  - 2022 Mockup/Mold production/Self-product cost, etc.
- Design machinery/devices and software
  - Costs of purchasing and administering machinery, devices, computer systems, and application software for design research and development in 2022
- Land/building for design research and development
  - Expenditures in 2022 for purchase of land for design research development, building cost and major repairs of the buildings, etc.
- Design education cost
  - Spending on seminars and workshops related to education in 2022, etc.
- Intellectual property purchase management cost
  - Acquisition and management costs of intellectual property rights (patent, utility model, design, trademark, etc.) related to design in 2022
- Other design-related current costs
  - Other costs for materials, handouts, supply purchases, business trips, etc. for design research in 2022

14. Application/Registration Classification

- Application : Act of submitting documents required by law to state authorities for the purpose of registering industrial property rights
- Registration : An administrative decision that grants rights when an administrative body has examined the requested documents requested for application and is satisfied with them

15. Standard Contract for Design Services

- A total of four design standard contracts related to product design, performance-based (product) design, visual design, and multimedia design created to improve unfair practices prevalent in the design industry

03 Respondent Characteristics

1. General Companies - Sample of Completed Surveys on Design Use

Item		Sample of completed surveys on utilization	
		Number of cases	%
Total		**20,437**	**100.0**
By region	Seoul	5,192	25.4
	Incheon/Gyeonggi/Gangwon	7,090	34.7
	Busan/Ulsan/Gyeongnam	2,663	13.0
	Daegu/Gyeongbuk	1,766	8.6
	Gwangju/Jeolla/Jeju	1,707	8.4
	Daejeon/Sejong/Chungcheong	2,019	9.9
By Industrial Classification	Product design	4,284	21.0
	Visual design	2,063	10.1
	Digital/Multimedia design	1,001	4.9
	Space design	4,656	22.8
	Fashion/Textile design	1,155	5.7
	Service/Experience design	2,640	12.9
	Industrial craft design	1,430	7.0
	Design infrastructure (design-based technology)	3,208	15.7
By size	Small enterprise	16,374	80.1
	Medium enterprise	2,071	10.1
	Middle market enterprise	1,091	5.3
	Large enterprise	901	4.4

2. Companies utilizing design – Sample of Completed Surveys

Item		Sample of Completed Surveys	
		Number of cases	%
Total		**1,886**	**100.0**
By region	Seoul	655	34.7
	Incheon/Gyeonggi/Gangwon	560	29.7
	Busan/Ulsan/Gyeongnam	215	11.4
	Daegu/Gyeongbuk	145	7.7
	Gwangju/Jeolla/Jeju	128	6.8
	Daejeon/Sejong/Chungcheong	183	9.7
By Industrial Classification	Product design	317	16.8
	Visual design	214	11.3
	Digital/Multimedia design	159	8.4
	Space design	290	15.4
	Fashion/Textile design	127	6.7
	Service/Experience design	329	17.4
	Industrial craft design	101	5.4
	Design infrastructure (design-based technology)	349	18.5
By size	Small enterprise	1,228	65.1
	Medium enterprise	518	27.5
	Middle market enterprise	75	4.0
	Large enterprise	65	3.4

3. Specialized Design Companies – Sample of Completed Surveys

Item		Sample of Completed Surveys	
		Number of cases	%
Total		**623**	**100.0**
By region	Seoul	382	61.3
	Incheon/Gyeonggi/Gangwon	86	13.8
	Busan/Ulsan/Gyeongnam	51	8.2
	Daegu/Gyeongbuk	25	4.0
	Gwangju/Jeolla/Jeju	48	7.7
	Daejeon/Sejong/Chungcheong	31	5.0
By industry	Product design	132	21.2
	Visual design	227	36.4
	Interior design	168	27.0
	Fashion, textiles, and other professional design industries	96	15.4
By size	1 person	119	19.1
	2–4 people	160	25.7
	5–9 people	176	28.3
	10–14 people	91	14.6
	15 people or more	77	12.4

4. Central Administration – Sample of Completed Surveys

- Surveyed 36 out of 40 total organizations

Item	Number of cases
Ministry	· 17 ministries / 18 ministries - Participating in the survey : Ministry of Employment and Labor, Ministry of Science and ICT, Ministry of Education, Ministry of Patriots and Veterans Affairs, Ministry of National Defense, Ministry of Land, Infrastructure, and Transport, Ministry of Economy and Finance, Ministry of Culture, Sports and Tourism, Ministry of Justice, Ministry of Health and Welfare, Ministry of Trade, Industry and Energy, Ministry of Gender Equality and Family, Ministry of Foreign Affairs, Ministry of Unification, Ministry of Maritime Affairs and Fisheries, Ministry of Public Administration and Security, Ministry of Environment - Non-responding to the survey : Ministry of Agriculture, Food and Rural Affairs
Ministry	· 3 ministries / 4 ministries - Participating in the survey : Korea Ministry of Government Legislation, Ministry of Food and Drug Safety, Ministry of Personnel Management - Non-responding to the survey : Ministry of SMEs and Startups
Administ-ration, agency, service, office	· 16 administration/agency/service/office / 18 administration/agency/service/office - Participating in the survey : National Police Agency, Korea Customs Service, National Tax Service, Korea Meteorological Administration, Rural Development Administration, Cultural Heritage Administration, Defense Acquisition Program Administration, Military Manpower Administration, Saemangeum Development and Investment Agency, National Fire Agency, Public Procurement Service, Korea Disease Control and Prevention Agency, Statistics Korea, Korea Intellectual Property Office, Korea Coast Guard, National Agency for Administrative City Construction - Non-responding to the survey : Public Prosecutor's Office, Korea Forest Service

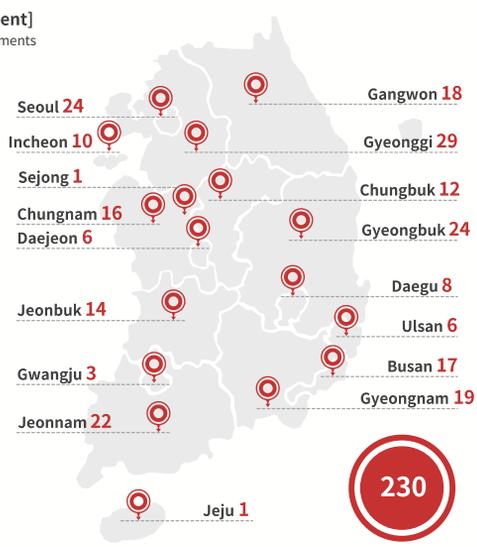
5. Local Government – Sample of Completed Surveys

- Survey completed for 230 of 243 local governments[1)]

[Completed Surveys Per Region of Local Government]

Number of completed surveys/Number of the entire local governments

City/Province		City/County/District (Administrative district/autonomous district)			Total
		City	County	District	
Seoul	1/1			23/25	24/26
Busan	1/1		1/1	15/15	17/17
Daegu	1/1		1/1	6/7	8/9
Incheon	1/1		2/2	7/8	10/11
Gwangju	1/1			2/5	3/6
Daejeon	1/1			5/5	6/6
Ulsan	1/1		1/1	4/4	6/6
Sejong	1/1				1/1
Gyeonggi	0/1	26/28	3/3		29/32
Gangwon	1/1	7/7	10/11		18/19
Chungbuk	1/1	3/3	8/8		12/12
Chungnam	1/1	8/8	7/7		16/16
Jeonbuk	1/1	6/6	7/8		14/15
Jeonnam	1/1	5/5	16/17		22/23
Gyeongbuk	1/1	10/10	13/13		24/24
Gyeongnam	1/1	8/8	10/10		19/19
Jeju	1/1				1/1
Total	16/17	73/75	78/82	66/69	230/243



1) No response from Mapo-gu and Yangcheon-gu, Seoul; Suseong-gu, Daegu; Yeonsu-gu, Incheon; Gwangju Dong-gu Office, Gwangju Buk-gu Office And Gwangju Gwangsan-gu Office, Gwangju; Gyeonggi Provincial Government; Ansan-si and Paju-si, Gyeonggi; Hwacheon-gun, Gangwon; Imsil-gun, Jeonbuk; Jangheung-gun, Jeonnam

04 Relative Standard Errors of Key Items

[Publication Scope of Major Items]

- Survey results are published by sections of the Design Industrial Classification and by size, region, and type of design utilization, and at the time of publication, relative standard errors for key variables are presented.
- The main items of this survey are as follows
  - Survey on General Companies' Use (primary survey) : Design-utilization rate
  - Survey of Companies utilizing design (secondary survey) : Design Investment Amount, Number of Designers
  - Survey of Specialized Design Companies : Revenue, number of workers, number of designers

▼ **Relative standard error of the design-utilization rate of Companies utilizing design (primary survey)***

Item		Mean	Sampling error	Confidence interval	Relative standard error
Total		**0.37**	**0.00**	**0.37 ~ 0.38**	**0.9%p**
Industry	Product design	0.35	0.01	0.35 ~ 0.36	2.0%p
	Visual design	0.51	0.01	0.50 ~ 0.52	2.0%p
	Digital/Multimedia design	0.65	0.01	0.64 ~ 0.67	2.2%p
	Space design	0.27	0.01	0.27 ~ 0.28	2.3%p
	Fashion/Textile design	0.62	0.01	0.61 ~ 0.64	2.2%p
	Service/Experience design	0.40	0.01	0.39 ~ 0.41	2.3%p
	Industrial craft design	0.22	0.01	0.21 ~ 0.23	4.8%p
	Design infrastructure (design-based technology)	0.39	0.01	0.38 ~ 0.40	2.2%p
Region	Seoul	0.46	0.01	0.45 ~ 0.46	1.5%p
	Incheon/Gyeonggi/Gangwon	0.35	0.01	0.34 ~ 0.35	1.6%p
	Busan/Ulsan/Gyeongnam	0.34	0.01	0.33 ~ 0.35	2.7%p
	Daegu/Gyeongbuk	0.34	0.01	0.33 ~ 0.35	3.3%p
	Gwangju/Jeolla/Jeju	0.34	0.01	0.33 ~ 0.35	3.3%p
	Daejeon/Sejong/Chungcheong	0.36	0.01	0.35 ~ 0.37	2.9%p
Size	Large enterprise	0.53	0.01	0.52 ~ 0.54	2.7%p
	Middle market enterprise	0.65	0.01	0.64 ~ 0.66	2.0%p
	Medium enterprise	0.42	0.01	0.41 ~ 0.43	2.5%p
	Small enterprise	0.36	0.00	0.35 ~ 0.36	1.0%p

* Converted design utilization to "1" and design non-utilization to "0" to calculate mean and deviation.

▼ **Relative standard error of the design investment amount of Companies utilizing design (secondary survey)**

(Unit : million won)

Item		Mean	Sampling error	Confidence interval			Relative standard error
Total		**86.66**	**18.78**	**67.88**	**~**	**105.44**	**21.7%p**
Industry	Product design	152.21	124.88	27.33	~	277.10	82.0%p
	Visual design	98.18	10.91	87.27	~	109.09	11.1%p
	Digital/Multimedia design	93.01	12.79	80.22	~	105.80	13.8%p
	Space design	89.60	25.18	64.42	~	114.78	28.1%p
	Fashion/Textile design	79.00	41.95	37.04	~	120.95	53.1%p
	Service/Experience design	75.56	10.32	65.23	~	85.88	13.7%p
	Industrial craft design	64.68	13.21	51.47	~	77.89	20.4%p
	Design infrastructure (design-based technology)	64.99	4.52	60.47	~	69.52	7.0%p
Region	Seoul	103.90	36.20	67.70	~	140.10	34.8%p
	Incheon/Gyeonggi/Gangwon	85.92	46.93	38.99	~	132.85	54.6%p
	Busan/Ulsan/Gyeongnam	55.95	7.52	48.43	~	63.47	13.4%p
	Daegu/Gyeongbuk	99.57	17.44	82.13	~	117.01	17.5%p
	Gwangju/Jeolla/Jeju	55.09	8.56	46.54	~	63.65	15.5%p
	Daejeon/Sejong/Chungcheong	80.79	12.41	68.38	~	93.20	15.4%p
Size	Large enterprise	1,206.90	1,056.72	150.18	~	2,263.62	87.6%p
	Middle market enterprise	410.63	58.87	351.76	~	469.50	14.3%p
	Medium enterprise	105.93	17.44	88.49	~	123.36	16.5%p
	Small enterprise	63.39	2.51	60.88	~	65.90	4.0%p

▼ **Relative standard error of the number of designers in Companies utilizing design (secondary survey)**

(Unit : person)

Item		Mean	Sampling error	Confidence interval			Relative standard error
Total		**1.87**	**0.27**	**1.60**	~	**2.14**	**14.3%p**
Industry	Product design	2.55	1.57	0.98	~	4.13	61.5%p
	Visual design	1.99	0.21	1.78	~	2.21	10.6%p
	Digital/Multimedia design	2.20	0.31	1.89	~	2.52	14.2%p
	Space design	2.24	0.81	1.43	~	3.04	36.0%p
	Fashion/Textile design	1.79	0.45	1.34	~	2.24	25.2%p
	Service/Experience design	1.49	0.19	1.30	~	1.69	13.0%p
	Industrial craft design	1.48	0.24	1.24	~	1.72	16.3%p
	Design infrastructure (design-based technology)	1.63	0.13	1.51	~	1.76	7.7%p
Region	Seoul	2.35	0.54	1.81	~	2.90	23.1%p
	Incheon/Gyeonggi/Gangwon	1.85	0.64	1.21	~	2.50	34.7%p
	Busan/Ulsan/Gyeongnam	1.25	0.13	1.12	~	1.39	10.5%p
	Daegu/Gyeongbuk	1.71	0.24	1.47	~	1.95	14.1%p
	Gwangju/Jeolla/Jeju	1.20	0.15	1.05	~	1.36	12.6%p
	Daejeon/Sejong/Chungcheong	1.69	0.22	1.47	~	1.91	13.2%p
Size	Large enterprise	14.85	13.26	1.60	~	28.11	89.3%p
	Middle market enterprise	7.55	0.97	6.58	~	8.52	12.8%p
	Medium enterprise	2.27	0.54	1.73	~	2.81	23.8%p
	Small enterprise	1.52	0.06	1.46	~	1.58	3.9%p

▼ Relative standard error of the revenue of Specialized Design Companies

(Unit : million won)

Item		Mean	Sampling error	Confidence interval			Relative standard error
Total		**311.83**	**44.13**	**267.70**	~	**355.96**	**14.2%p**
Industry	Product design	369.63	143.23	226.41	~	512.86	38.7%p
	Visual design	235.83	32.69	203.14	~	268.52	13.9%p
	Interior design	423.33	103.16	320.18	~	526.49	24.4%p
	Fashion, textiles, and other design	380.72	162.65	218.07	~	543.37	42.7%p
Region	Seoul	359.77	69.34	290.43	~	429.11	19.3%p
	Incheon/Gyeonggi/Gangwon	234.73	60.08	174.64	~	294.81	25.6%p
	Busan/Ulsan/Gyeongnam	257.16	65.52	191.64	~	322.68	25.5%p
	Daegu/Gyeongbuk	441.00	397.10	43.91	~	838.10	90.0%p
	Gwangju/Jeolla/Jeju	325.85	108.80	217.06	~	434.65	33.4%p
	Daejeon/Sejong/Chungcheong	172.77	37.90	134.87	~	210.67	21.9%p
Size	1 person	141.32	18.46	122.86	~	159.78	13.1%p
	2–4 people	416.94	31.85	385.10	~	448.79	7.6%p
	5–9 people	899.63	91.56	808.07	~	991.19	10.2%p
	10–14 people	1,432.72	262.33	1170.39	~	1695.05	18.3%p
	15 people or more	5,074.49	696.35	4378.14	~	5770.85	13.7%p

▼ Relative standard error of the number of workers in Specialized Design Companies

(Unit : person)

Item		Mean	Sampling error	Confidence interval			Relative standard error
Total		**2.21**	**0.29**	**1.93**	~	**2.50**	**12.9%p**
Industry	Product design	2.53	0.36	2.16	~	2.89	14.3%p
	Visual design	1.94	0.29	1.65	~	2.23	15.1%p
	Interior design	2.71	1.00	1.71	~	3.71	37.0%p
	Fashion, textiles, and other design	2.07	0.37	1.70	~	2.44	17.7%p
Region	Seoul	2.54	0.49	2.05	~	3.03	19.2%p
	Incheon/Gyeonggi/Gangwon	1.84	0.25	1.60	~	2.09	13.4%p
	Busan/Ulsan/Gyeongnam	1.47	0.23	1.24	~	1.70	15.5%p
	Daegu/Gyeongbuk	2.95	1.11	1.84	~	4.06	37.7%p
	Gwangju/Jeolla/Jeju	2.28	0.44	1.84	~	2.73	19.4%p
	Daejeon/Sejong/Chungcheong	1.78	0.38	1.40	~	2.17	21.6%p
Size	1 person	1.00	0.00	1.00	~	1.00	0.0%p
	2–4 people	3.01	0.06	2.95	~	3.07	2.0%p
	5–9 people	6.47	0.09	6.37	~	6.56	1.4%p
	10–14 people	11.78	0.13	11.65	~	11.91	1.1%p
	15 people or more	32.98	5.36	27.63	~	38.34	16.2%p

▼ **Relative standard error of the number of designers in Specialized Design Companies**

(Unit : person)

Item		Mean	Sampling error	Confidence interval	Relative standard error
Total		**1.59**	**0.08**	**1.51 ~ 1.67**	**5.2%p**
Industry	Product design	1.82	0.18	1.64 ~ 2.01	9.9%p
	Visual design	1.52	0.15	1.37 ~ 1.67	9.8%p
	Interior design	1.61	0.14	1.47 ~ 1.75	8.8%p
	Fashion, textiles, and other design	1.55	0.16	1.39 ~ 1.72	10.6%p
Region	Seoul	1.70	0.13	1.57 ~ 1.83	7.7%p
	Incheon/Gyeonggi/Gangwon	1.41	0.12	1.28 ~ 1.53	8.6%p
	Busan/Ulsan/Gyeongnam	1.29	0.16	1.13 ~ 1.45	12.4%p
	Daegu/Gyeongbuk	1.94	0.45	1.49 ~ 2.39	23.2%p
	Gwangju/Jeolla/Jeju	1.78	0.25	1.54 ~ 2.03	13.8%p
	Daejeon/Sejong/Chungcheong	1.49	0.22	1.27 ~ 1.71	14.9%p
Size	1 person	1.00	0.00	1.00 ~ 1.00	0.0%p
	2–4 people	2.20	0.07	2.13 ~ 2.27	3.2%p
	5–9 people	3.91	0.12	3.79 ~ 4.03	3.2%p
	10–14 people	6.49	0.31	6.17 ~ 6.80	4.8%p
	15 people or more	11.43	1.18	10.24 ~ 12.61	10.4%p

▪ Based on the relative sampling error of the sample survey of Statistics Canada's
- 0.00% – 4.99% : Excellent
- 5.00% – 9.99% : Very Good
- 10.00% – 14.99% : Good
- 15.00% – 24.99% : Acceptable
- 25.00% – 34.99% : Use with Caution
- 35.00% or more : Too Unreliable to Publish

OF KOREA
STATISTICS
INDUSTRY
DESIGN

DESIGN
INDUSTRY
STATISTICS
OF KOREA

Part. 2

Key finding of the survey

OF KOREA
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INDUSTRY
DESIGN

01 Scale of the Design Industry and Workforce

1. Design Industrial Scale

Industrial scale measuring formula

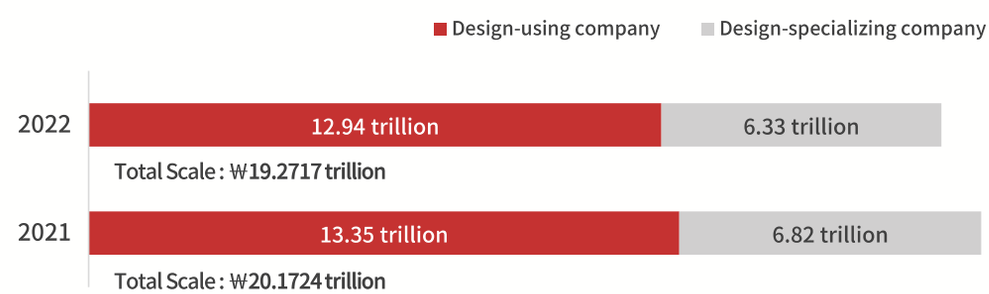
Investments of design-using company + Revenue of design-specializing company
*Investments exclude the service costs for specializing companies

- Design industrial scale in 2022 : 19.2717 trillion won
- The scale of the design industry was 19.2717 trillion won in 2022, down 4.5% from 2021 (20.172 trillion won).
- The scale of the design industry is the sum of 12.9446 trillion in design investment* by design-using companies and 6.271 trillion won in revenue by design-specializing companies.

*Design investment of design-using companies excludes design-specializing companies' service costs (1.3715 trillion won), and the total design investment amounts to 14.3161 trillion won.

- Both design-using companies and design-specializing companies showed a decrease in industrial scale compared to 2022, with design-specializing companies showing a great year-over-year decrease of 7.3%.

▼ Design Industrial Scale



▼ Design Industrial Scale (Unit : million won)

Item	2021	2022	Increase/Decrease rate
Design-using companies (a)	13,350,069	12,944,585	-3.0%
Design-specializing companies (b)	6,822,054	6,327,086	-7.3%
Industrial scale (a+b)	**20,172,389**	**19,271,672**	-4.5%

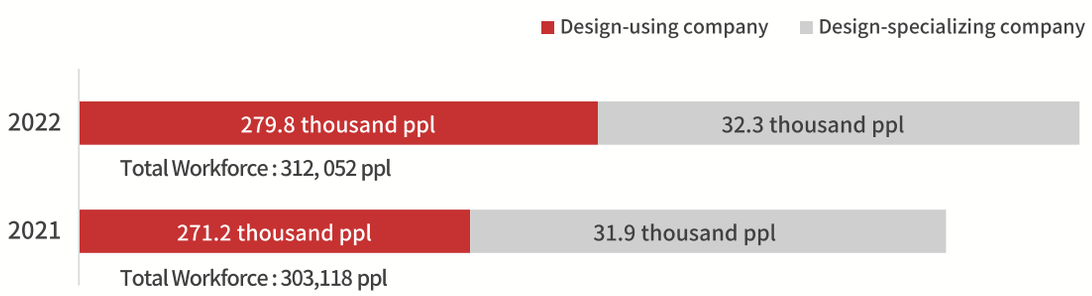
2. Design Workforce Scale

Workforce scale measuring formula

Number of designers from design-using company + Number of designers from design-specializing company

- Design Workforce Scale: 312,052 people
- In 2022, the design workforce scale was 312,052, a 2.9% increase from the previous year (303,118).
- The design workforce scale is estimated to be the sum of 279,773 designers at design-using companies companies and 32,279 designers in design-specializing companies.
- The workforce of both design-using companies and design-specializing companies increased year-over-year, and in particular, the number of design-using companies increased significantly from 271.2K in 2021 to 279.8K in 2022.

▾ **Design Workforce Scale**



▾ **Design Workforce Scale**

(Unit : million won, ppl)

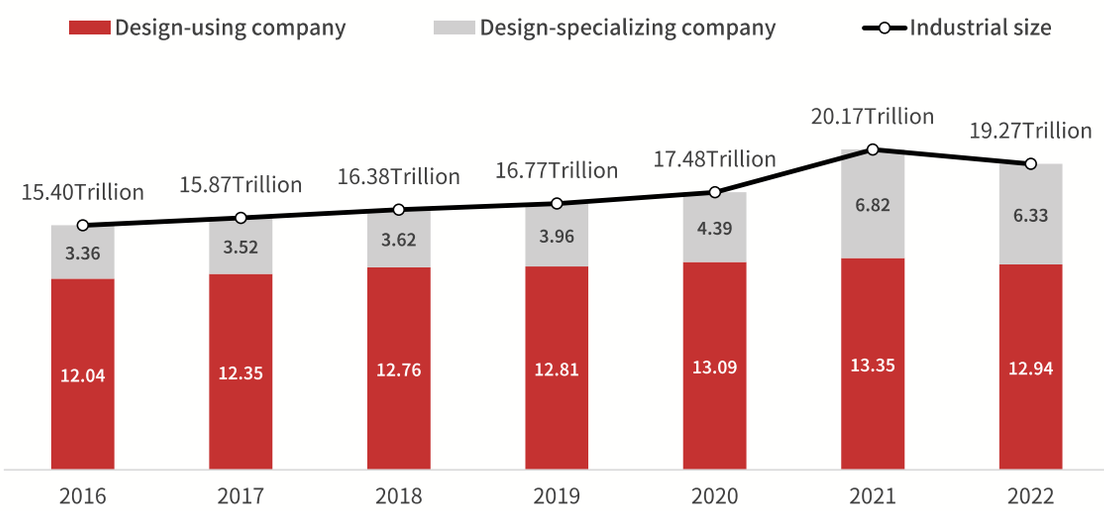
Item	2021	2022	Increase/Decrease rate
Design-using companies (a)	271,230	279,773	3.1%
Design-specializing companies (b)	31,888 *(43,889)	32,279 *(44,882)	1.2%
Workforce scale (a+b)	**303,118** *(315,119)	**312,052** *(324,655)	2.9%

* Total number of workers in design-specializing companies including non-designers

3. Trends of the Industrial Scale

- In 2022, the design industrial scale was shown to be 12.94 trillion won for design-using companies, and 6.33 trillion won for design-specializing companies, totaling 19.27 trillion won.
- In 2022, design-using companies accounted for 67.2% of the total industrial scale, while design-specializing companies accounted for 32.8%, and the share of revenue from specializing companies increased to more than 30% since 2021.
- The industrial scale of the design-specializing companies was 6.82 trillion won in 2021, a relatively large increase from 2020, but by 2022, it dropped to 6.33 trillion.

▾ **Trends of the Industrial Scale** (Unit : trillion won)



▾ **Trends of the Industrial Scale** (Unit : million won)

Item	2016	2017	2018	2019	2020	2021	2022
Using companies (a)	12,041,094	12,348,980	12,758,020	12,808,262	13,085,687	13,350,069	**12,944,585**
Specializing companies (b)	3,357,819	3,524,707	3,624,542	3,962,759	4,389,712	6,822,054	**6,327,086**
Industrial scale (a+b)	15,398,914	15,873,688	16,382,562	16,771,021	17,475,389	20,172,122	**19,271,672**

▾ **Change in the industrial scale measuring formula**

After the change	(Using companies) Design investment + (Specializing companies) Revenue
Before the change	(Using companies) Design investment + (Specializing companies) Revenue + (Public sector) Design budget + (Freelancers) Salary + (Higher education) Employee salary

▾ **Industrial Scale Trends (Before Change)** (Unit : million won)

Item	2016	2017	2018	2019	2020	2021	2022
Using companies (a)	12,041,094	12,348,980	12,758,020	12,808,262	13,085,687	13,350,069	**12,944,585**
Specializing companies (b)	3,357,819	3,524,707	3,624,542	3,962,759	4,389,712	6,822,054	**6,327,086**
Public sector (c)	232,050 *(43,120)	234,287 *(42,944)	229,214 *(31,988)	230,881 *(35,144)	250,095 *(24,723)	232,963 *(30,648)	**296,708** *(19,763)
Freelancers (d)	1,034,235	1,189,519	999,053	1,040,812	1,441,433	956,341	**1,033,396**
Higher education (e)	248,517	247,577	251,733	248,212	257,455	265,449	**272,077**
Industrial scale (a+b+c+d+e)	16,913,716 *(16,724,786)	17,545,071 *(17,353,728)	17,862,562 *(17,665,336)	18,290,926 *(18,095,189)	19,424,373 *(19,199,001)	21,626,876 **(21,424,561)	**20,873,852** **(20,596,907)

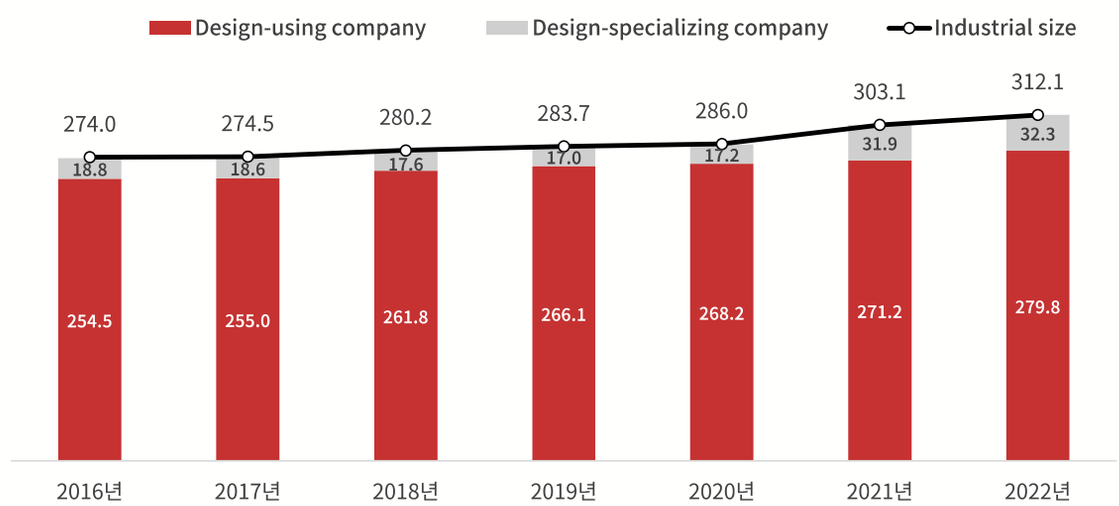
* The public sector's budget scale excluding design service costs paid to design-specializing companies, etc.

※ Detailed changes are listed in "Year-over-year Improvements" on page 2 for users.

4. Trends of the Workforce Scale

- In 2022, the design workforce scale grew to 312.1K people with 279.8K from design-using companiess and 32.3K from design-specializing companies.
- As a percentage of total workforce scale, design-using companies account for 89.7% and design-specializing companies for 10.3%.
- By 2020, design-specializing companies were less than 10% of the entire workforce, but increased to 10% or more by 2021.

▾ **Trends of the Industrial Scale** (Unit : thousand ppl)



▾ **Trends of the Industrial Scale** (Unit : person)

Item	2016	2017	2018	2019	2020	2021	2022
Using companies (a)	254,489	255,047	261,760	266,075	268,176	271,230	**279,773**
Specializing companies (b)	18,803 *(29,536)	18,645 *(29,480)	17,566 *(27,670)	17,026 *(25,284)	17,217 *(28,775)	31,888 *(43,889)	**32,279** *(44,882)
Industrial scale (a+b)	273,999 *(284,732)	274,515 *(285,350)	280,156 *(290,260)	283,722 *(291,980)	285,982 *(297,540)	303,118 *(315,119)	**312,052** *(324,655)

▾ **Change in the workforce scale measuring formula**

After the change	(Using companies) Number of designers + (Specializing companies) Number of designers
Before the change	(Using companies) Number of designers + (Specializing companies) Number of designers + (Public sector) Number of design department employees + (Freelancers) Number of designers + (Higher education) Number of design department faculty

▾ **Workforce Scale Trends (Before Change)** (Unit : person)

Item	2016	2017	2018	2019	2020	2021	2022
Using companies (a)	254,489	255,047	261,760	266,075	268,176	271,230	**279,773**
Specializing companies (b)	18,803 *(29,536)	18,645 *(29,480)	17,566 *(27,670)	17,026 *(25,284)	17,217 *(28,775)	31,888 *(43,889)	**32,279** *(44,882)
Public sector (c)	708	823	830	621	588	655	**470**
Freelancers (d)	47.655	56,004	47,847	49,847	62,516	40,478	**43,714**
Higher education (e)	2,623	2,524	2,408	2,333	2,337	2,237	**2,228**
Industrial scale (a+b+c+d+e)	324,277 *(335,010)	333,042 *(343,878)	330,411 *(340,515)	335,903 *(344,161)	350,835 *(362,393)	346,489 *(358,490)	**358,464** *(371,067)

* Total number of workers in design-specializing companies including non-designers

※ Detailed changes are listed in "Year-over-year Improvements" on page 2 for users.

02 Design Industrial Scale by Survey Target

1. Design-using Companies

1) Design-using Rate

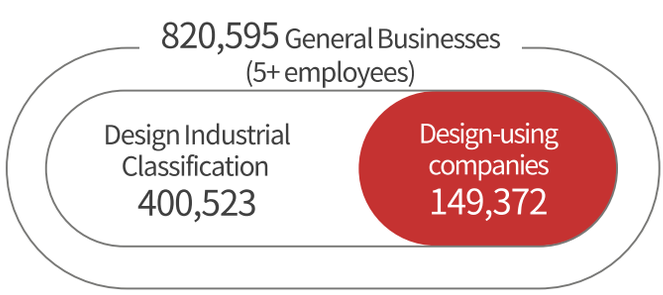
- (Based on businesses with 5 or more employees nationwide) Out of 820,595 businesses with 5 or more employees, there are 149,372 design-using companies with a design-using rate of 18.2%.
- (Based on the Design Industrial Classification) The design-using rate for businesses (400,532) falling under the Design Industrial Classification was found to be 37.3%.

▾ **Trends of the Design-using Rate**

Item	2021		2022	
	Businesses with 5 or more employees	Businesses with 5 or more employees in the Design Industrial Classification	Businesses with 5 or more employees nationwide*	Businesses with 5 or more employees in the Design Industrial Classification
Design-using Rate	18.7%	37.4%	**18.2%**	**37.3%**

* Calculation of design-using companies excludes design-specializing companies.

▾ **Design-using Rate**



- Out of design-using companies, 24.2% have a design department and 43.5% employ designers, and 64.9% were design outsourcers.

▾ **Design-using Rates and Designer Hiring Rate(Based on the Survey of the Status of General Companies' Use)[2)]**

Design-using Companies	Companies with design departments	Number of designer-hiring companies	Design outsourcers
149,372	36,162(24.2%)	65,039(43.5%)	96,896(64.9%)

2) The 2nd survey is extracted based on industry and scale, rather than the design-using criteria of the 1st survey. Thus, the results of the design-using criteria such as the design department, hiring desgienrs, and design outsourcing of the survey of general companies' use differ from the results of the survey of design-using companies (2nd survey).

▾ **Design-using Rates of Businesses with 5 or More Employees**

(Unit : company)

Sections and Scale of the Standard Industrial Classification		Item		Design-using rate
		Businesses with 5 or more employees nationwide*	Design-using companies	
Sections of the Standard Industrial Classification	Agriculture, forestry, and fishing	3,658	303	8.3%
	Mining	580	-	0.0%
	Manufacturing	152,943	41,188	26.9%
	Electric, gas, steam, and water utilities	1,023	-	0.0%
	Sewage and waste treatment, raw material recycling and environmental restoration industry	5,509	-	0.0%
	Construction	73,220	15,417	21.1%
	Wholesale and retail	131,803	22,164	16.8%
	Transportation	24,421	1,473	6.0%
	Accommodation and restaurant	88,348	12	0.0%
	Publishing, video, broadcasting, and information services	24,489	12,072	49.3%
	Finance and insurance	28,372	6,588	23.2%
	Real estate and leasing	29,171	5,366	18.4%
	Professional, scientific, and technical services (excluding professional design industry)	45,663	12,908	28.3%
	Business facilities management and business support services	24,944	5,957	23.9%
	Public administration, defense, and social security administration (excluding central administration and local governments)	6,106	82	1.3%
	Education service (excluding universities)	45,702	8,724	19.1%
	Healthcare and social services	95,105	11,455	12.0%
	Arts, sports, and leisure-related services	13,315	2,223	16.7%
	Associations and organizations, repair and other personal service industries	26,223	3,440	13.1%
By scale	Small enterprise	667,672	117,896	17.7%
	Medium enterprise	146,251	29,644	20.3%
	Large enterprise	6,672	1,833	27.5%
Total		**820,595**	**149,372**	**18.2%**

▾ Design-using Rates in the Design Industrial Classification

(Unit : company)

Number of businesses		Number of businesses		Design-using rate
		5 or more employees in the Design Industrial Classification	Design-using companies	
By Industrial Classification	Product Design	51,881	18,330	35.3%
	Visual Design	20,018	10,276	51.3%
	Digital/Multimedia Design	11,144	7,289	65.4%
	Space Design	94,211	25,800	27.4%
	Fashion/Textile Design	10,016	6,246	62.4%
	Service/Experience Design	87,492	35,148	40.2%
	Industrial Crafts Design	16,472	3,625	22.0%
	Design Infrastructure (design-based technology)	109,298	42,659	39.0%
By scale	Small enterprise	327,667	116,923	35.7%
	Medium enterprise	61,267	25,968	42.4%
	Middle market enterprise	8,775	4,648	53.0%
	Large enterprise	2,823	1,833	64.9%
Total		**400,532**	**149,372**	**37.3%**

2) Design Industrial Scale of Design-using Companies

- The industrial scale of design-using companies is 12.9446 trillion won (average design investment of 86.66 million won).
- By industrial scale, Product Design (2.79 trillion won) was the largest, followed by Design Infrastructure (2.7726 trillion won), Service/Experience Design (2.6556 trillion won), and Spatial Design (2.3116 trillion won).
- The average design investment by industry was highest in Product Design (152.2 million won).
- When looking at the design industrial scale by Industry Classification, Fashion/Textile Design grew by 10.3% year-over-year, while Industrial Crafts Design saw the largest change, with a 14.2% decrease.
- By scale, the design industrial scale among small enterprises increased by 3.9% compared to 2021, while large enterprises decreased by 15.4%.

▾ **Design Industrial Scale of Design-using Companies** (Unit : company, million won)

Item		2021			2022			Year-over-year increase/ decrease rate
		Design -using companies	Average design investment	Industrial Scale	Design-using companies	Average design investment	Industrial scale	
By Industrial Classification	Product Design	18,557	158.39	2,939,308	18,330	152.21	2,790,012	-5.1%
	Visual Design	10,913	102.01	1,113,188	10,276	98.18	1,008,920	-9.4%
	Digital/ Multimedia Design	6,997	102.95	720,313	7,289	93.01	677,946	-5.9%
	Space Design	26,847	87.95	2,361,210	25,800	89.60	2,311,616	-2.1%
	Fashion/Textile Design	6,754	66.23	447,369	6,246	79.00	493,413	10.3%
	Service/ Experience Design	34,823	73.65	2,564,672	35,148	75.56	2,655,633	3.5%
	Industrial Crafts Design	4,048	67.56	273,441	3,625	64.68	234,484	-14.2%
	Design infrastructure	42,538	68.89	2,930,568	42,659	64.99	2,772,560	-5.4%
By scale	Small enterprise	119,836	57.08	6,840,240	112,132	63.39	7,108,192	3.9%
	Medium enterprise	28,769	139.41	4,010,715	34,169	105.93	3,619,419	-9.8%
	Middle market enterprise	1,951	402.58	785,541	1,870	410.63	767,710	-2.3%
	Large enterprise	921	1,861.11	1,713,572	1,201	1,206.90	1,449,265	-15.4%
Total		**151,477**	**88.13**	**13,350,069**	**149,372**	**86.66**	**12,944,585**	**-3.0%**

※ Calculation of the design industrial scale of design-using companies excludes service costs of design-specializing companies.

3) Design Workforce of Design-using Companies

- The design workforce of design-using companies was 279,773 people with an average number of 1.87 designers, and the average number of designers of companies hiring designers was 3.05.
- By industry, design workforce was the largest in Design Infrastructure (69,653 designers), followed by Space Design (57,710 designers), etc.
- The average design workforce by scale was highest for large enterprises at 14.85.
- Compared to the scale of the workforce in 2021, Service/Experience Design was up 8.8% and Fashion/Textile Design 7.6%, but Industrial Crafts Design was down 13.2%.
- By company scale, the decline was largest for middle market enterprises (-16.6%) and large enterprises (-21.0%).

▾ **Design Workforce of Design-using Companies** (Unit : person)

Item		2021			2022			Year-over-year increase/ decrease rate
		Hiring companies Average number of designers	Using companies Average number of designers	Workforce scale	Hiring companies Average number of designers	Using companies Average number of designers	Workforce scale	
By Industrial Classification	Product Design	3.07	2.47	45,792	4.27	2.55	46,811	2.2%
	Visual Design	3.05	1.97	21,485	3.20	1.99	20,496	-4.6%
	Digital/Multimedia Design	2.55	2.32	16,251	2.36	2.20	16,048	-1.3%
	Space Design	2.71	2.03	54,613	2.75	2.24	57,710	5.7%
	Fashion/Textile Design	2.14	1.54	10,399	2.12	1.79	11,192	7.6%
	Service/Experience Design	2.26	1.87	48,267	4.05	1.49	52,497	8.8%
	Industrial Crafts Design	1.97	1.53	6,186	2.75	1.48	5,366	-13.2%
	Design infrastructure	1.99	2.22	68,236	2.65	1.63	69,653	2.1%
By scale	Small enterprise	1.75	1.25	149,902	2.43	1.52	170,377	13.7%
	Medium enterprise	3.38	2.82	81,810	3.88	2.27	77,444	-5.3%
	Middle market enterprise	10.12	8.98	16,936	11.19	7.55	14,116	-16.6%
	Large enterprise	35.16	24.43	22,582	52.15	14.85	17,836	-21.0%
Total		**2.42**	**1.79**	**271,230**	**3.05**	**1.87**	**279,773**	**3.1%**

2. Scale and Workforce of Design-specializing Companies

1) Design Industrial Scale of Design-specializing Companies

- The industrial scale of the design-specializing companies reached 6.3271 trillion won, a decrease of 7.3% year-on-year.
- By industry, Visual Design (2.5182 trillion won) is the largest industry, with a 17.7% increase in scale from 2021.
- The industrial scale of Interior Design, on the other hand, was 1.8483 trillion won, down 21.6% from 2021 (2.3588 trillion won).

▾ **Design Industrial Scale of Design-specializing Companies** (Unit : company, million won)

Item		2021			2022			Year-over-year increase/ decrease rate
		Number of design-specializing companies	Average revenue	Industrial scale	Number of design-specializing companies	Average revenue	Industrial scale	
By industry	Product Design	3,258	453.28	1,476,748	3,306	369.63	1,222,013	-17.2%
	Visual Design	10,015	213.70	2,140,183	10,678	235.83	2,518,220	17.7%
	Interior Design	3,988	591.47	2,358,782	4,366	423.33	1,848,262	-21.6%
	Fashion, Textiles, and Other Designs	2204	384.00	846,341	1940	380.72	738,592	-12.7%
Total		**19,465**	**350.48**	**6,822,054**	**20,290**	**311.83**	**6,327,086**	**-7.3%**

2) Design Workforce Scale of Design-specializing Companies

- The design workforce (designers) of design-specializing companies is estimated to be 31,888 (average of 1.59 designers per business).
- Visual Design had the largest workforce at 16,196.
- The industrial scale of Interior Design declined, but the number of designers increased to 9.4% year-over-year.

▾ **Design Workforce Scale of Design-specializing Companies** (Unit : company, person)

Item		2021			2022			Year-over-year increase/ decrease rate
		Number of design-specializing companies	Average number of designers	Workforce scale	Number of design-specializing companies	Average number of designers	Workforce scale	
By industry	Product Design	3,258	1.90	6,184	3,306	1.82	6,032	-2.5%
	Visual Design	10,015	1.59	15,971	10,678	1.52	16,196	1.4%
	Interior Design	3,988	1.61	6,432	4,366	1.61	7,039	9.4%
	Fashion, Textiles, and Other Designs	2204	1.50	3,301	1940	1.55	3,013	-8.7%
Total		**19,465**	**1.64**	**31,888**	**20,290**	**1.59**	**32,279**	**1.2%**

03 Reference Statistics

1. Scale of Public Sector

- The public sector covers central government (22 ministries and 18 offices) and local governments (243 administrative cities/autonomous districts).
  The scale of design investment in the public sector is calculated by the total sum of the budget of the design departments in organizations with dedicated design departments.
- The budget for dedicated design departments totaled 248.7 billion won, comprised of 102.1 billion won from the central government and 146.6 billion won from local governments.
- The workforce of dedicated design departments totaled 470 designers with 32 in the central government and 438 in local governments.
- The budget for dedicated departments increased in 2022 (248.7 billion won) compared to 2021 (233 billion won), but the workforce decreased from 2021 (655 designers) to 2022 (470 designers).

▾ **Design Investment Scale and Workforce Status of the Public Sector** (Unit : million won, person)

Item	2021		2022	
	Dedicated design departments' total budget	Dedicated departments' total number of employees	Dedicated design departments' total budget	Dedicated departments' total number of employees
Central government	95,171 *(556)	75	102,143 *(971)	32
Local governments	130,338 *(22,638)	580	146,565 *(14,824)	438
Total	**232,963 *(30,648)**	**655**	**248,708 *(15,795)**	**470**

2. Scale of Freelance Workforce

Number of freelancers measuring formula

Self-employed designers without employees (Employment Survey by region)
*Excludes designers who are commercial, temporary, day laborers, self-employed with employees, and unpaid family workers.

- There were 43,297 freelance designers.

  ※ Previously, the number of freelancers was estimated using the results of Regional Employment Surveys and Design Industry Statistics, but to address the overlap between freelancers and one-person design companies and the complexity of the estimation calculations, starting this year, use the freelancers were calculated only with the number of the "self-employed without employees."

▼ **Job Hiring Status of Freelance Designers**

Item	Self-employed without employees	Commercial, temporary, and daily laborers, and the self-employed with employees, and unpaid family workers other than the self-employed without employees	Total
Workforce status (percentage)	**43,297(17.5%)**	204,023(82.5%)	247,320(100.0%)

Freelance workforce measuring formula

Number of freelancers × Average monthly wage of self-employed designers without employees × 12 months

- The scale of the freelance market is 1.0235 trillion won
  - 1.0235 trillion won
    = 43,297 freelancers × 1.974 million won, the average monthly wage of the self-employed without employees × 12 months

※ Average monthly wage of the self-employed designers without employees is sourced from the Regional Employment Survey results.

▼ **Freelance Scale Trends**

Item	2018	2019	2020	2021	2022
Freelance designers	37,789	38,190	48,674	42,115	43,297
Freelance workforce	790.3 billion	777.8 billion	1.1,223 trillion	995.9 billion	1.0235 trillion

▼ **Change in the freelancer scale measuring formula**

After the change	Self-employed designers without employees
Before the change	{(Design-using companies) Number of designers + (Design-specializing companies) Number of employees} x Percentage of freelancers - One-person nonstore design-specializing companies

▼ **Freelancer Scale Trends (Before Change)**

Item	2018	2019	2020	2021	2022
Freelance designers	47,847	49,847	62,516	40,478	**43,714**
Freelance workforce	999.1 billion	1.0408 trillion	1.4414 trillion	956.3trillion	1.0334 trillion

※ Detailed changes are listed in "Year-over-year Improvements" on page 3 for users.

3. Scale of Higher Education

Scale of higher education

Design professor salary (245,070 million won) + Design department research cost (27,077 million won)

- The total size of the design industry in the education sector was analyzed to be 272.1 billion won. (245.1 billion won, annual salary of professors in design departments + 27 billion won, research costs of design departments

  ※ The education sector's workforce scale is the sum of the number of full-time professors, associate professors, assistant professors, and non-tenure faculty in design-related departments at community colleges and four-year colleges (graduate schools).[3)]

- The number of design department faculty in 2022 (2,228) was similar to 2021 (2,237). The number of four-year college faculty increased (1,527 → 1,534), while the number of community college faculty decreased (710 → 694).

▾ **Annual Salary of Professors in Design Departments**

Division		2021			2022		
		Professors' annual salary Average	Design departments number of faculty	Design departments Professors' estimated annual salary	Professors' annual salary Average	Design departments number of faculty	Design departments Professors' estimated annual salary
4-year college	Full-time professor	130.9	695	91,007	134.9	717	**96,704**
	Associate professor	109.4	335	36,653	112.7	318	**35,837**
	Assistant professor	91.9	398	36,560	94.6	402	**38,036**
	Non-tenure faculty	68.8	99	6,808	70.9	97	**6,912**
Subtotal		-	1,527	171,028	-	1,534	**177,488**
Professional college	Full-time professor	124.2	211	26,211	127.9	203	**25,974**
	Associate professor	101.3	182	18,440	104.4	168	**17,532**
	Assistant professor	82.4	197	16,233	84.9	204	**17,314**
	Non-tenure faculty	55.4	120	6,660	57.1	119	**6,762**
Subtotal		-	710	67,545	-	694	**67,582**
Total		-	2,237	238,572	110.0	2,228	**245,070**

※ The annual salary of professors in design department and the number of design department faculty members were calculated using the Education Statistics DB of the Korea Educational Development Institute.

3) Full-time faculty included presidents, deans, professors, associate professors, assistant professors, and full-time lecturers before 2012, but with the abolition of the "full-time lecturer system" in 2013, full-time lecturers were excluded
while including presidents, deans, professors, associate professors, and assistant professors; non-tenure faculty includes adjunct professors, visiting professors, part-time lecturers, emeritus professors, guest professors, honorary professors, and others.
The number of full-time lecturers is not provided by the Education Statistics Service of the Korea Educational Development Institute and was estimated by the percentage change in enrolled students from 2021 to 2022.

▼ **Design Department's Research Costs** (Unit : million won)

Division		2021	2022
4-year college	Central government support	13,607	12,371
	Local government support	1,791	1,733
	Private support	6,096	7,288
	Foreign support	9	254
	On-campus support	4,067	3,598
Subtotal		**25,570**	**25,244**
Professional college	Professors'	1,307	1,763
Total		**26,877**	**27,007**

※ Refer to the results of the 2022 Nationwide University Research Activity Survey Analysis Report.

04 Design export/import scale

Revenue of design-using company

Number of utilizing companies × Percentage of importers × (Average design investments × Percentage of design development outsourced overseas)

- The scale of the design-using companies' design revenue is estimated at 15.9 billion won.

▾ **Design import size**

Division	Design Number of companies utilizing	Rate of importers[4]	Design average investment (million won)	Percentage of overseas outsourcing of design development when developing design	Estimated import size (million won)
Design import	149,372	0.23%	84.44	55.25%	15,852

Exports of design-specializing company

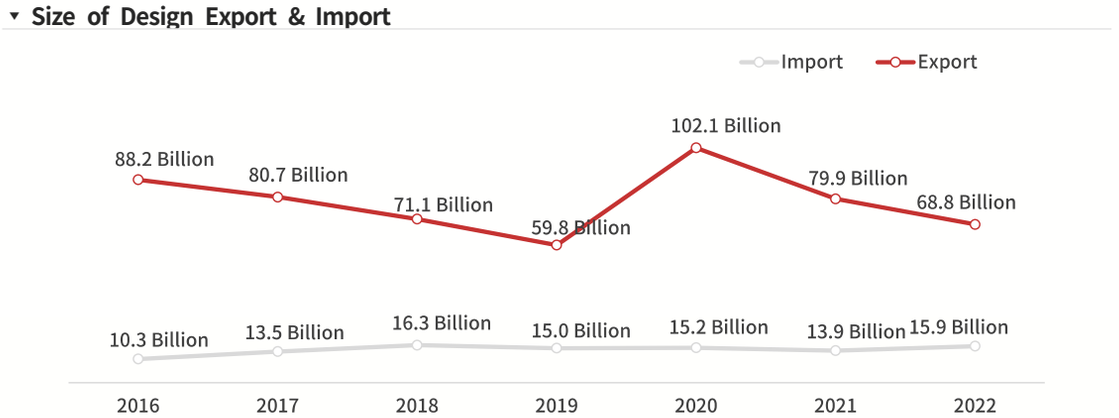
Number of design-specializing companies × Percentage of exporters × (average revenue × percentage of overseas revenue among revenues)

- Design-specializing companies' design export scale is estimated to be 68.8 billion won.

▾ **Design export size**

Division	Design Number of design-specializing companies	Rate of exporters[5]	Average revenue (million won)	Proportion of overseas sales among sales	Estimated export scale (million won)
Design export	20,290	4.11%	311.83	26.46%	68,792

▾ **Size of Design Export & Import**



4) Rate of importers: Companies with 1% or more of outsourced design development and commission to overseas companies in the survey of design-using companies

5) Percentage of exporters: Companies with 1% or more revenue composition and foreign customer proportion among design-specializing companies surveyed

05 Economic value of design

Design's economic value

Revenue of businesses in the Design Industrial Classification × Ratio of value added × Design contribution

- The economic value of design in 2022 was analyzed at 178 trillion won (160 trillion won in 2021).
- By industry, Service/Experience Design (63.7 trillion won) was the highest, followed by Design Infrastructure (46.4 trillion won), Product Design (28.4 trillion won), and Space Design (21.5 trillion won).

▾ **The Economic Value of Design**

Division	Revenue (Unit : million won)	Value-added ratio (Unit : %)	Design contributions (Unit : %)	Design's economic value (Unit : million won)
Product design	342,729,464	29.6%	28.0%	28,423,135
Visual design	106,045,335	26.8%	26.6%	7,574,443
Digital/Multimedia design	40,208,911	47.7%	35.2%	6,755,563
Space design	171,005,124	45.5%	27.6%	21,493,725
Fashion/Textile design	29,173,164	20.6%	36.7%	2,208,520
Service/Experience design	402,432,968	64.0%	24.7%	63,747,688
Industrial craft design	19,121,313	31.7%	29.1%	1,764,229
Design infrastructure	364,929,110	55.8%	22.8%	46,434,172
Total	**1,475,645,389**	-	**26.3%**	**178,401,475**

※ Revenue = Total revenue of businesses falling under the Design Industrial Classification (including design-specializing companies) × Design-using rate × Revenue growth rate in 2022 compared to 2020[6)]

※ Value-added ratio: Estimated with data from the Bank of Korea[7)] and calculated for each design industry section by linking the design industry classification group and product classification code. The value-added ratio is the percentage of value added in the total input of each product.

※ Design contributions: Results of the survey of design-using companies as of 2022

6) For the total revenue of businesses falling under the Design Industrial Classification in the 2020 Economy Census, the revenue for 2022 was estimated using the growth rate of all industries' revenue from the corporate management analysis index announced by the Bank of Korea. The estimated revenue and the design-using rate for the year are applied to calculate the entire revenue of the design-using companies.

7) The value-added ratios from the Bank of Korea's industry correlation table (based on the 2019 extended table) were used. I.O. (Input and Output) of product classification were matched with design groups to produce the most recent year's value-added ratio by design section, reflecting the distribution of businesses in the group.

06 Status of Graduates and Employment of Design Departments

1. Current status of graduates and employed persons from the design department of a university (graduate school)

- The total number of graduates from college or graduate design departments was 20,382 (20,599 the previous year), and there were 12,188 people employed (12,243 in the previous year).
- Meanwhile, there are 17,638 graduates excluding those who went on to higher education, enlisted in the military, cannot get a job, are recognized as excluded, or are international students.

▾ **Status of Graduates and the Employed of Design Departments at Colleges (Graduate Schools)**

(Unit : person)

Division	Status of Graduates and the Employed		
	Graduates	Graduates (A)	Employed (B)
2022	**20,382**	**17,638**	**12,188**
2021	20,599	17,923	12,243
Increase/Decrease	**-217**	**-285**	**-55**

Status of Graduates and the Employed of Design Departments at Colleges (Graduate Schools) by Classification

(Unit : person)

Division		Status of Graduates and the Employed											
		Graduates				Graduates (A)				Employed (B)			
		B.S	M.S	Ph.D.	Total	B.S	M.S	Ph.D.	Total	B.S	M.S	Ph.D.	Total
Total		**19,477**	**344**	**561**	**20,382**	**17,246**	**270**	**122**	**17,638**	**11,886**	**206**	**96**	**12,188**
By school	Community colleges	7,942	-	-	7,942	6,670	-	-	6,670	4,718	-	-	4,718
	Colleges	10,866	-	-	10,866	9,973	-	-	9,973	6,710	-	-	6,710
	Industrial universities	97	-	-	97	83	-	-	83	50	-	-	50
	Various colleges and universities	17	-	-	17	16	-	-	16	13	-	-	13
	General graduate schools	-	344	561	905	-	270	122	392	-	206	96	302
	Technical universities	555	-	-	555	504	-	-	504	395	-	-	395
By major	General Design	1,773	178	344	2,295	1,561	158	50	1,769	978	114	39	1,131
	Product design	3,037	36	41	3,114	2,664	27	7	2,698	1,918	21	6	1,945
	Visual design	3,442	10	23	3,475	3,081	12	2	3,095	2,080	12	2	2,094
	Digital/Multimedia design	2,805	19	30	2,854	2,513	13	6	2,532	1,712	11	5	1,728
	Space design	3,099	4	31	3,134	2,663	19	2	2,684	1,918	15	2	1,935
	Fashion/Textile design	3,623	14	47	3,684	3,203	15	9	3,227	2,217	11	7	2,235
	Service/Experience design	537	11	15	563	500	7	1	508	361	6	1	368
	Industrial craft design	719	72	27	818	646	16	45	707	397	13	34	444
	Design infrastructure	442	-	3	445	415	3	-	418	305	3	-	308

※ Data cited from the Korea Educational Development Institute

※ Survey-based date : December 31, 2022 (Graduates : February 2022 and August 2021 graduates)

※ Graduates are divided into employed and non-employed, and the non-employed are divided into those who have entered college, those who have entered the military, those who are unable to find employment, those recognized as excluded, and foreign students. When calculating the employment rate, graduates (A) are used, excluding those who have entered college, those who have entered the military, those who are ineligible for employment, those recognized as excluded, and foreign students.

※ Graduates (A) refer to the number of students who have graduated, excluding enrollees to higher learning, the enlisted, the unemployable, the exemptible, foreign students, etc.

※ Employed (B) refers to the number of health insurance office enrollees, on-campus workers, overseas workers, agricultural, forestry, and fishing workers, and individual creative activity researchers, solo entrepreneurs, and freelancers as of the survey-based date (December 31, 2022).

2. Status of Graduates and the Employment Rate of Design Departments at Colleges (Graduate Schools)

- The employment rate of design department graduates was 69.1%[8], an increase of 0.8%p from the previous year.
- Employment rates by degree were 68.9% for bachelor's, 76.3% for master's, and 78.7% for doctor's.

▼ **Status of Graduates and the Employment Rate of Design Departments at Colleges (Graduate Schools)**

(Unit : person)

Division	Status of Graduates and the Employment Rate		
	Graduates (A)	Employed (B)	Employment rate (C=B/A)
2022	**17,638**	**12,188**	**69.1%**
2021	17,923	12,243	68.3%
Increase/Decrease	**-285**	**-55**	**0.8%p**

8) The overall employment rate for higher education institutions nationwide during that period was 69.6% (Ministry of Education, 2021).

Status of Graduates and the Employment Rate of Design Departments at Colleges (Graduate Schools)

(Unit : person)

Division		Status of Graduates and the Employment Rate											
		Graduates (A)				Employed (B)				Employment rate (C=B/A, %)			
		B.S	M.S	Ph.D.	Total	B.S	M.S	Ph.D.	Total	B.S	M.S	Ph.D.	Total
Total		**17,246**	**270**	**122**	**17,638**	**11,886**	**206**	**96**	**12,188**	**68.9**	**76.3**	**78.7**	**69.1**
By school	Community colleges	6,670	-	-	6,670	4,718	-	-	4,718	70.7	-	-	70.7
	Colleges	9,973	-	-	9,973	6,710	-	-	6,710	67.3	-	-	67.3
	Industrial universities	83	-	-	83	50	-	-	50	60.2	-	-	60.2
	Various colleges and universities	16	-	-	16	13	-	-	13	81.3	-	-	81.3
	General graduate schools	-	270	122	392	-	206	96	302	-	76.3	78.7	77.0
	Technical universities	504	-	-	504	395	-	-	395	78.4	-	-	78.4
By major	General Design	1,561	158	50	1,769	978	114	39	1,131	62.7	72.2	78.0	63.9
	Product design	2,664	27	7	2,698	1,918	21	6	1,945	72.0	77.8	85.7	72.1
	Visual design	3,081	12	2	3,095	2,080	12	2	2,094	67.5	100.0	100.0	67.7
	Digital/Multimedia design	2,513	13	6	2,532	1,712	11	5	1,728	68.1	84.6	83.3	68.2
	Space design	2,663	19	2	2,684	1,918	15	2	1,935	72.0	78.9	100.0	72.1
	Fashion/Textile design	3,203	15	9	3,227	2,217	11	7	2,235	69.2	73.3	77.8	69.3
	Service/Experience design	500	7	1	508	361	6	1	368	72.2	85.7	100.0	72.4
	Industrial craft design	646	16	45	707	397	13	34	444	61.5	81.3	75.6	62.8
	Design infrastructure	415	3	-	418	305	3	-	308	73.5	100.0	-	73.7

※ Data cited from the Korea Educational Development Institute

※ Survey-based date : December 31, 2022 (Graduates : February 2022 and August 2021 graduates)

※ Graduates are divided into employed and unemployed, and the unemployed are divided into enrollees to higher learning, the enlisted, the unemployable, the exemptible, foreign students, etc.

※ When calculating the employment rate, we used graduates (A), which exclude enrollees to higher learning, the enlisted, the unemployable, the exemptible, foreign students, etc.

※ Graduates (A) refer to the number of students who have graduated, excluding enrollees to higher learning, the enlisted, the unemployable, the exemptible, foreign students, etc.

※ Employed (B) refers to the number of health insurance office enrollees, on-campus workers, overseas workers, agricultural, forestry, and fishing workers, and individual creative activity researchers, solo entrepreneurs, and freelancers as of the survey-based date (December 31, 2022).

※ Employment rate: Employed (B)/{Graduates (A)-(Enrollees to higher learning+The enlisted+The unemployable+The exemptible+Foreign students)}*100

DESIGN
INDUSTRY
STATISTICS
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Part. 3

Summary Of Survey Results

01. Companies Utilizing Design
02. Specialized Design Companies
03. Public Sector

OF KOREA
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01

Companies Utilizing Design

1. Design-utilization Rate
2. Design Utilization Fields
3. Financial and Investment Status
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18. Design Trend

OF KOREA

STATISTICS

INDUSTRY

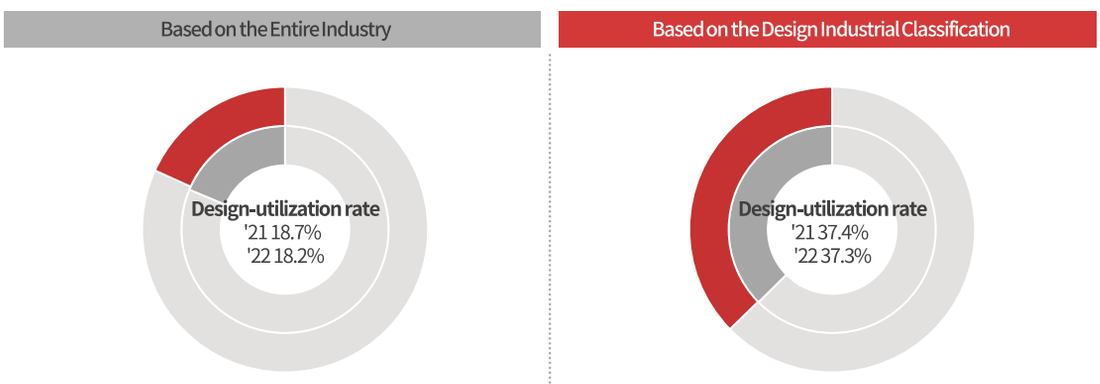
DESIGN

1. Design-utilization Rate

- (Based on the entire industry) The design utilization rate (across all industries) was 18.2% in 2022 (18.7% in 2021).
- (Based on the design industrial classification) The design-utilization rate was 37.3% in 2022 (37.4% in 2021).

▾ **Design-utilization Rates by the Entire Industry/Design Industrial Classification**

(Unit : %)



▾ **Design-utilization Rates by the Design Industrial Classification**

(Unit : %)

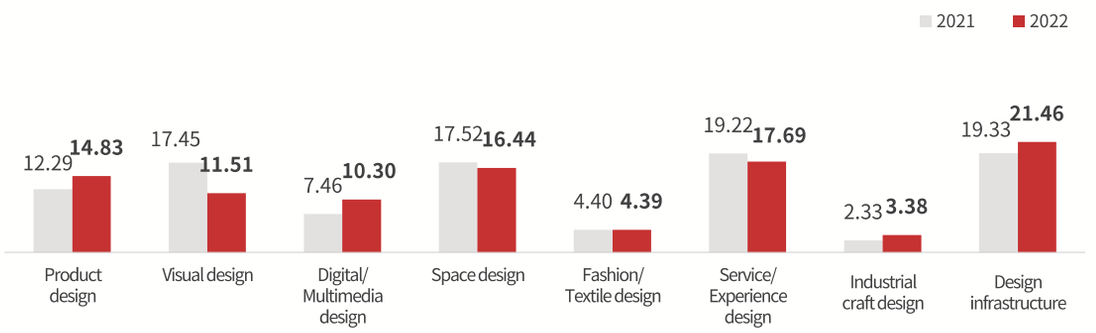
Item		2021	2022
Total		**37.4**	**37.3**
By industry	Product design	32.7	35.3
	Visual design	49.8	51.3
	Digital/Multimedia design	66.2	65.4
	Space design	28.8	27.4
	Fashion/Textile design	58.2	62.4
	Service/Experience design	41.5	40.2
	Industrial craft design	22.1	22.0
	Design infrastructure	39.0	39.0

Note) In 2021, the design utilization rate was calculated including unincorporated associations. Use caution when comparing.

2. Design Utilization Fields

- Main design utilization fields (based on multiple responses) were "Design infrastructure" (21.46%), "Service/Experience" (17.69%), “Space design” (16.44%), etc. in order.
- "Design infrastructure" increased slightly compared to 2021(19.33%).

▾ **Design Utilization Fields** (Unit : %)



▾ **Design Utilization Fields** (Unit : %)

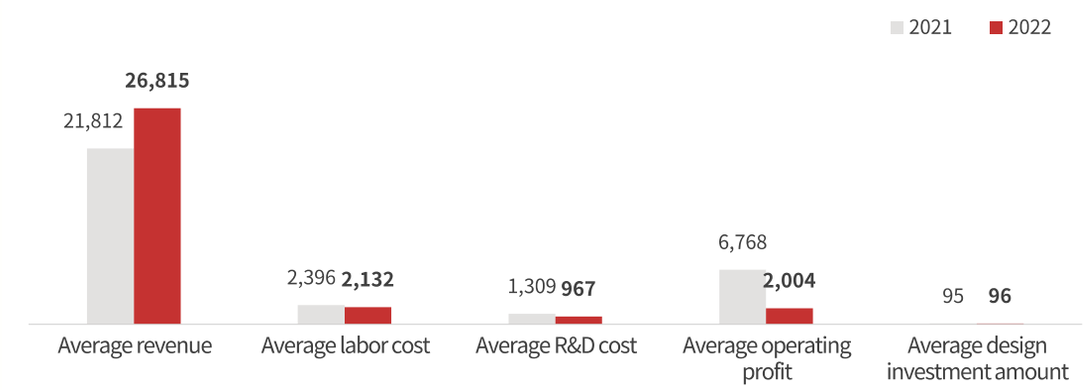
Item		Product Design	Visual Design	Digital media Design	Space Design	Fashion/ Textile Design	Services/ Experi-ence Design	Indust -rial craft Design	Design infrastru-cture
Total		**14.83**	**11.51**	**10.30**	**16.44**	**4.39**	**17.69**	**3.38**	**21.46**
By industry	Product design	91.62	5.52	2.02	0.05	0.02	0.18	0.58	0.01
	Visual design	0.24	96.91	2.18	0.09	0.23	0.27	0.02	0.05
	Digital/Multimedia design	0.13	4.14	94.47	1.02	0.00	0.11	0.00	0.13
	Space design	2.08	4.11	0.79	92.15	0.39	0.44	0.00	0.03
	Fashion/Textile design	1.01	2.67	0.00	0.00	95.70	0.00	0.44	0.18
	Service/Experience design	0.08	5.47	21.34	0.14	0.08	72.87	0.00	0.02
	Industrial craft design	2.86	3.26	0.00	12.32	4.83	0.00	75.87	0.85
	Design infrastructure	10.77	6.21	0.47	0.45	0.58	1.47	5.08	74.97
By size	Large enterprise	8.50	8.33	8.49	3.19	0.37	41.13	0.39	29.60
	Middle market enterprise	10.75	13.01	34.48	12.77	0.84	24.52	1.22	2.41
	Medium enterprise	13.14	6.41	17.17	12.65	5.52	27.91	3.15	14.05
	Small enterprise	15.49	13.07	7.82	17.80	4.14	14.21	3.52	23.95

3. Financial and Investment Status

- "Revenue" for Companies utilizing design averaged 26,814.91 million won and "Design investment amount" averaged 95.84 million won in 2022 (including the service cost of Specialized Design Companies).
- Compared to 2021, "Revenue" increased with an average of 26,814.91 million won (21,812.49 million won in 2021) and "Design investment amount" was similar.

▾ **Financial and Investment Status**

(Unit : million won)



▾ **Financial and Investment Status in 2022**

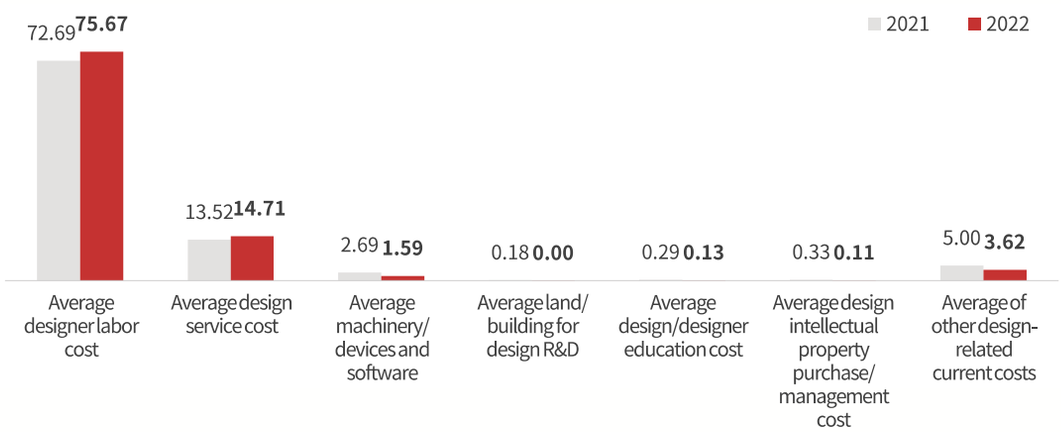
(Unit : million won)

Item		Revenue	Labor cost	R&D cost	Operating profit	Design investment amount
Total		**26,814.91**	**2,132.00**	**966.66**	**2,004.06**	**95.84**
By industry	Product design	105,341.70	8,574.78	6,893.39	9,031.31	159.64
	Visual design	12,495.71	1,063.92	112.59	503.69	102.39
	Digital/Multimedia design	4,711.96	958.54	127.79	303.96	98.45
	Space design	9,439.32	1,442.87	91.60	307.60	95.16
	Fashion/Textile design	17,833.63	1,144.48	162.89	1,352.98	81.56
	Service/Experience design	30,369.37	1,031.74	102.89	2,123.02	100.07
	Industrial craft design	19,079.65	1,839.58	368.70	924.24	66.43
	Design infrastructure	9,852.08	1,314.23	178.54	751.59	67.93
By size	Large enterprise	1,563,953.44	120,366.42	103,691.66	134,107.55	1,217.33
	Middle market enterprise	71,255.13	7,097.51	1,054.95	3,003.83	428.31
	Medium enterprise	33,902.90	1,714.95	142.13	2,300.01	124.74
	Small enterprise	7,453.00	910.14	116.36	482.52	69.48

4. Design Investment Amount

- The highest design investment amount for Companies utilizing design was the “Designer labor cost” with an average of 75.67 million won, followed by “Design service cost” (an average of 14.71 million won).
- Both "Designer labor cost" and "Design service cost" increased compared to 2021.

▾ **Design Investment Amount** (Unit : million won)



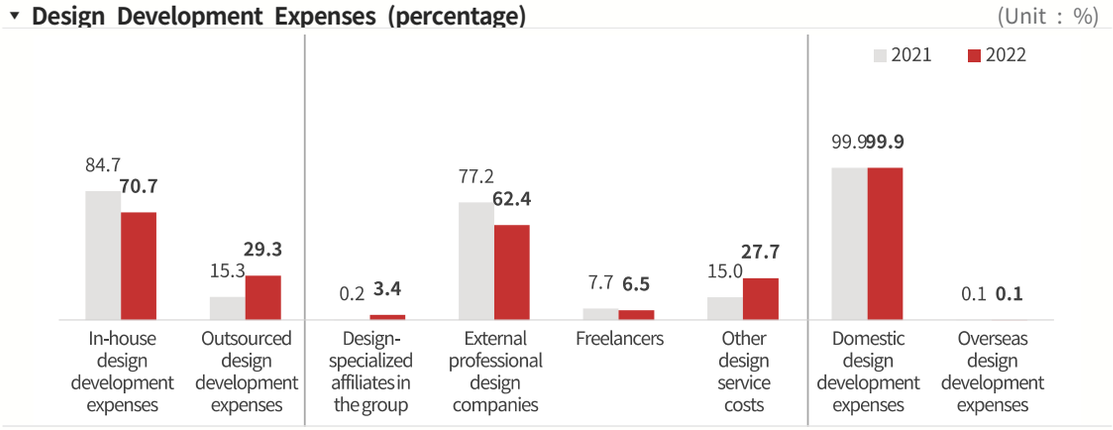
▾ **Design Investment Amount in 2022** (Unit : million won)

Item		Design investment amount	Average designer labor cost	Average design service cost					Average machinery / devices and software	Land for design research development/ building	Average design / designer education cost	Average design intellectual property purchase /management cost	Average of other design-related current costs
				Subtotal	In-group design specialized affiliates	External professional design companies	Freelancers	Other					
Total		**95.84**	**75.67**	**14.71**	**0.50**	**9.18**	**0.96**	**4.07**	**1.59**	**0.00**	**0.13**	**0.11**	**3.62**
By industry	Product design	159.64	138.54	8.43	0.04	7.43	0.29	0.68	3.52	0.02	0.22	0.32	8.59
	Visual design	102.39	80.36	16.24	0.01	4.21	2.30	9.72	2.15	0.00	0.35	0.17	3.12
	Digital/Multimedia design	98.45	85.94	5.57	0.00	5.44	0.13	0.00	1.09	0.00	0.33	0.33	5.19
	Space design	95.16	68.58	19.82	2.85	5.56	0.52	10.89	0.33	0.00	0.14	0.05	6.24
	Fashion/Textile design	81.56	74.88	3.32	0.14	2.56	0.61	0.00	1.49	0.00	0.02	0.10	1.75
	Service/Experience design	100.07	64.82	33.13	0.00	24.51	2.51	6.10	0.83	0.01	0.02	0.06	1.21
	Industrial craft design	66.43	62.24	1.89	0.00	1.75	0.14	0.00	0.84	0.00	0.01	0.25	1.20
	Design infrastructure	67.93	60.26	3.10	0.00	2.93	0.17	0.00	2.19	0.00	0.12	0.02	2.24
By size	Large enterprise	1,217.33	1,156.83	47.50	0.59	10.43	0.00	36.48	7.16	0.00	0.39	0.56	4.90
	Middle market enterprise	428.31	384.41	32.60	5.33	17.68	0.18	9.40	2.97	0.03	0.67	0.42	7.21
	Medium enterprise	124.74	87.53	31.19	0.67	18.81	1.56	10.14	1.78	0.02	0.14	0.17	3.92
	Small enterprise	69.48	55.33	9.04	0.37	6.09	0.80	1.78	1.46	0.00	0.12	0.07	3.46

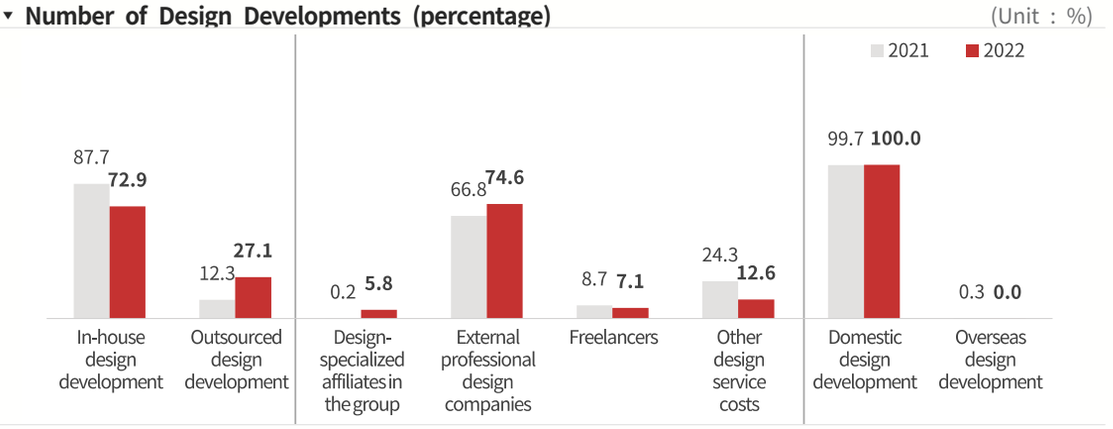
5. Design Development Expenses and Number of Cases

- For the percentage of design expenses, "In-house design development" was shown to be 70.7% and "Outsourced design development" was 29.3%. For the percentage of number of cases, "In-house design development" was shown to be 72.9% and "Outsourced design development" was 27.1%.
- When looking at the "Outsourced design development" by outsourcing target, the highest percentage of both expenses and number of cases was "External professional design companies".

▾ **Design Development Expenses (percentage)** (Unit : %)



▾ **Number of Design Developments (percentage)** (Unit : %)



▾ **Average Number and Expenses of Design Development as of 2022**

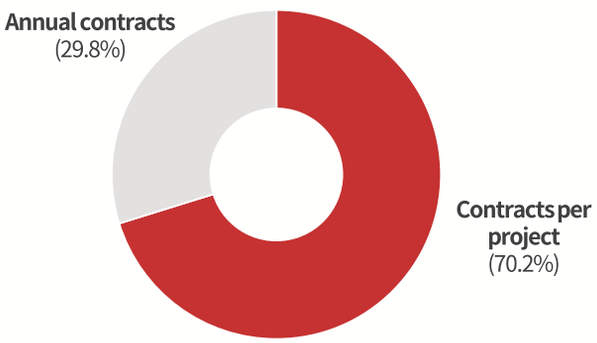
Item	In-house design development expenses	Out-sourced design development expenses	By outsourcing target				Domestic and overseas commissions	
			Special-ized affiliates in the group	External professi-onal design compani-es	Free-lancers	Other design service costs	Domestic design develop-ment expenses	Overseas design develop-ment expenses
Expenses (Unit : million won)	35.54	14.71	0.50	9.18	0.96	4.07	14.70	0.01
Number of cases (Unit : Number of cases)	14.72	5.46	0.31	4.07	0.39	0.69	5.46	0.00

6. Status by Design Service Contract Type

- By design service contract type, the percentage of “Contracts per project” (70.2%) was higher than “Annual contracts” (29.8%).
- The percentage of quality satisfaction was 88.7% in “Annual contracts”, and 78.6% in “Contracts per project”.

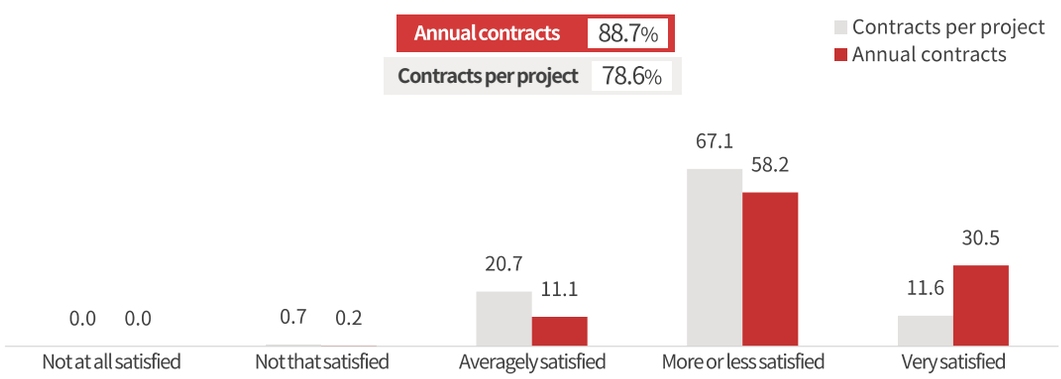
▾ **The percentage of company’s design services by contract type**

(Based on companies experienced design outsourcing, Unit : %)



▾ **The level of satisfaction by contract type**

(Based on companies experienced design outsourcing, Unit : %)



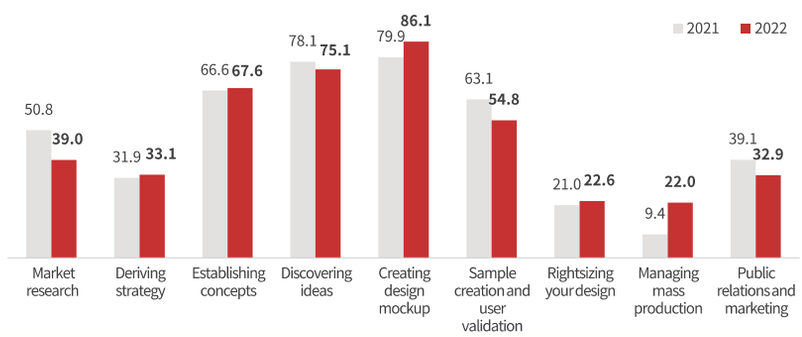
※ Status by Design Service Contract Type has been added since this year.

7. Designers/Specialized Design Companies/Freelancers' involvement stage in the new product development process

- In the involvement stage of designers, Specialized Design Companies and freelancers in the new product development, "Creating design mockup" was the highest.
- In the designer's involvement stage, "Creating design mockup" (86.1%) was the highest, followed by "Discovering ideas" (75.1%) and "Establishing concepts" (67.6%).
- In the involvement stage of Specialized Design Companies and freelancers, "Creating design mockup" was the highest, followed by "Sample creation and user validation" (Specialized Design Companies : 49.6%, freelancers : 59.0%)

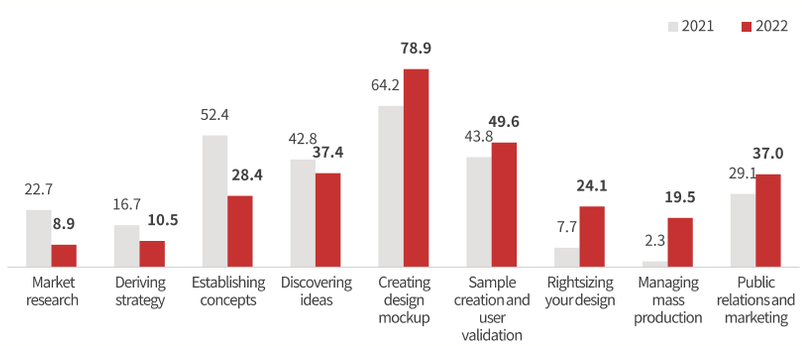
▾ **Designers' involvement stage in the new product development process**

(Duplicate responses, unit: %)



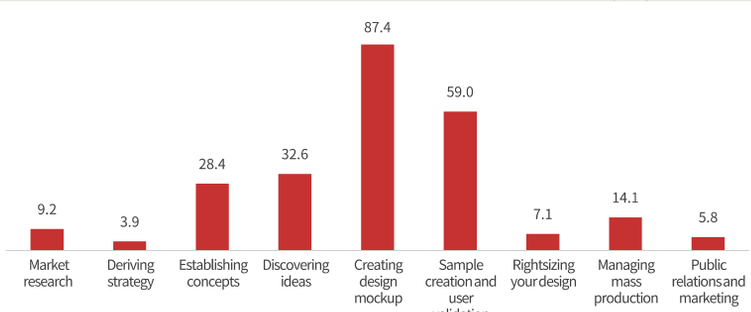
▾ **Specialized design companies' involvement stage in the new product development process**

(Duplicate responses, unit: %)



▾ **Freelancers' involvement stage in the new product development process**

(Duplicate responses, unit: %)

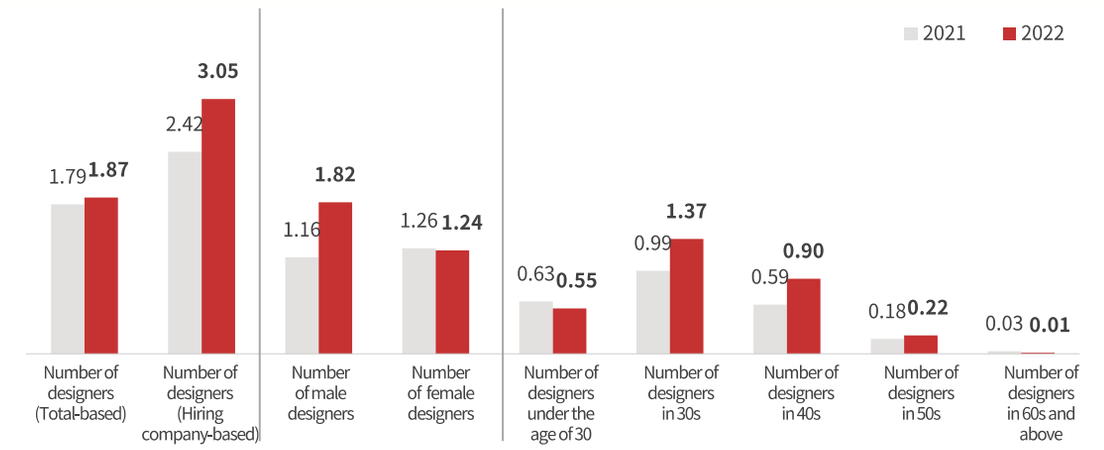


※ "Freelancers" has been added to the involvement stage in the new product development process since this year.

8. Design workforce

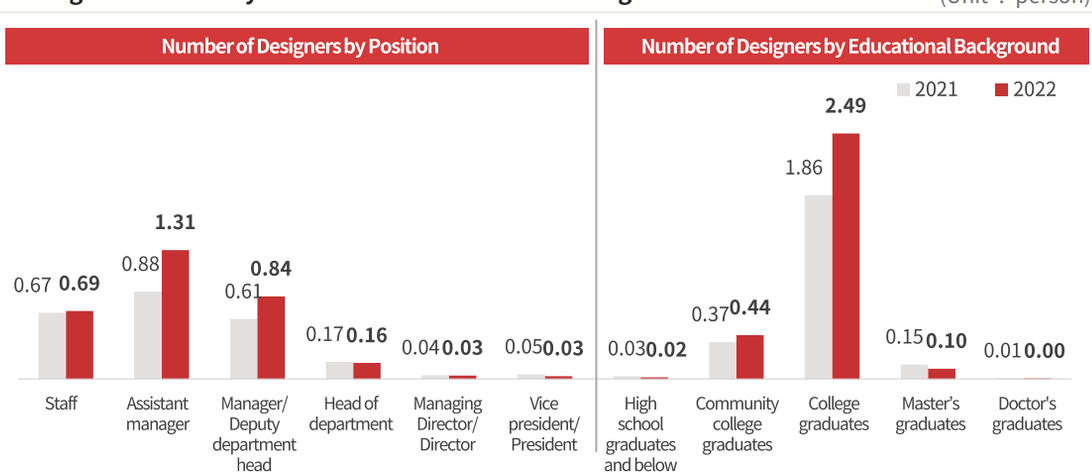
- The average number of designers was 1.87 across all Companies utilizing design (3.05 across designer-hiring companies), which increased compared to 2021.
- By hiring companies, there were more male designers(1.82) than women (1.24), and by age, those in their 30s (1.37) were the most common.

▾ **Design Workforce** (Unit : person)



- By position, the most common was "Assistant manager" (1.31), followed by “Manager/Deputy department head” (0.84) and "Staff" (0.69).
- By educational background, "College graduate" (2.49) was the most common, which increased compared to 2021(1.86).

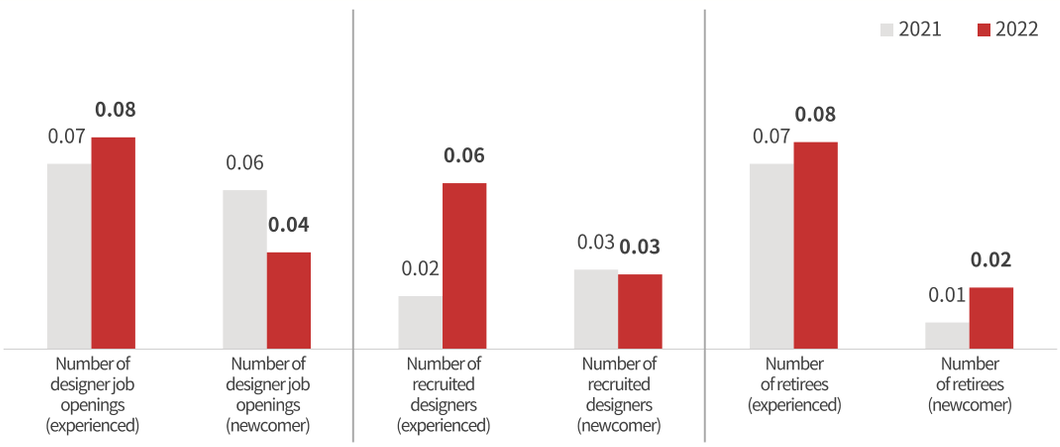
▾ **Design Workforce by Position and Educational Background** (Unit : person)



9. Status of Design Workforce Job Openings/Recruitment/Retirements

- The average "Number of designer job openings (experienced)" was 0.08, which was higher than the newcomers (0.04) that decreased compared to 2021 (0.06).
- The average "Number of recruited designers (experienced)" increased from 0.02 (2021) to 0.06 and the average "Number of recruited designers (newcomer)" was 0.03.
- The average "Number of retirees (experienced)" (0.08) and the average "Number of retirees (newcomer)" (0.02) were both higher than 2021.

▾ **Status of Design Workforce Job Openings/Recruitment/Retirements** (Unit : person)



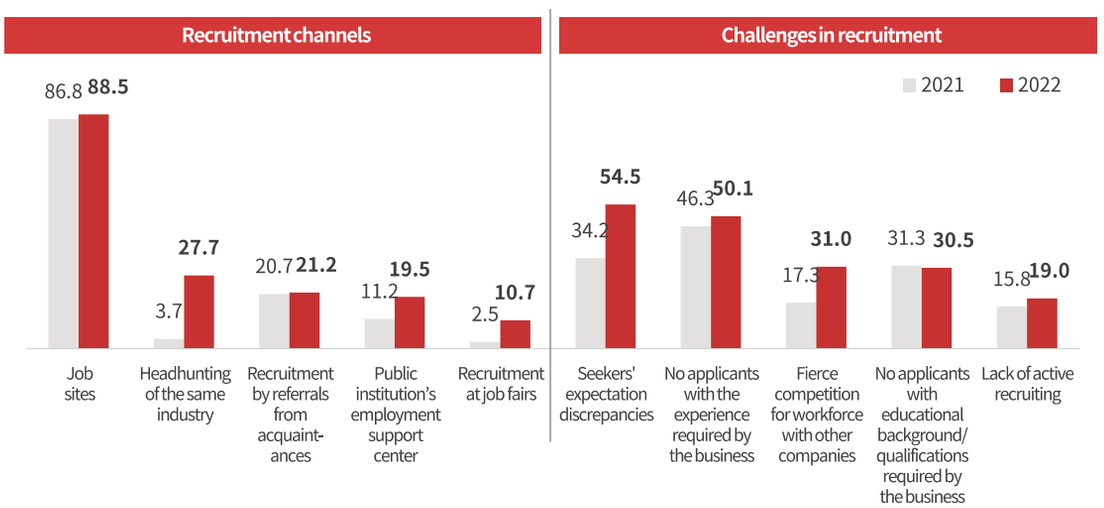
▾ **Status of Design Workforce Job Openings/Recruitment/Retirements** (Unit : person)

Item		Job opening		Recruitment		Retirement	
		Experienced designer	New designer	Experienced designer	New designer	Experienced designer	New designer
Total		**0.08**	**0.04**	**0.06**	**0.03**	**0.08**	**0.02**
By industry	Product design	0.12	0.02	0.12	0.02	0.12	0.01
	Visual design	0.06	0.04	0.06	0.04	0.06	0.05
	Digital/Multimedia design	0.15	0.02	0.12	0.01	0.13	0.04
	Space design	0.07	0.05	0.02	0.04	0.09	0.02
	Fashion/Textile design	0.09	0.03	0.07	0.01	0.03	0.01
	Service/Experience design	0.09	0.10	0.06	0.07	0.08	0.04
	Industrial craft design	0.02	0.00	0.02	0.00	0.02	0.00
	Design infrastructure	0.06	0.01	0.06	0.01	0.06	0.01
By size	Large enterprise	0.47	0.42	0.47	0.42	0.34	0.30
	Middle market enterprise	0.14	0.08	0.14	0.08	0.23	0.09
	Medium enterprise	0.10	0.06	0.07	0.04	0.08	0.04
	Small enterprise	0.07	0.03	0.06	0.02	0.07	0.02

10. Design Workforce Recruitment Channels and Challenges

- The most common design workforce recruitment channel (duplicate responses) was “Job sites" (88.5%), followed by “Headhunting of the same industry” (27.7%) and “Recruitment by referrals from acquaintances” (21.2%).
- “Headhunting of the same industry” increased compared to 2021 (3.7% → 27.7%).
- The challenges in recruitment (duplicate responses) were high in "Seekers' expectation discrepancies" (54.5%) and “No applicants with the experience required by the business” (50.1%).

▾ **Design Workforce Recruitment Channels and Challenges** (Top 5, duplicate responses, unit: %)



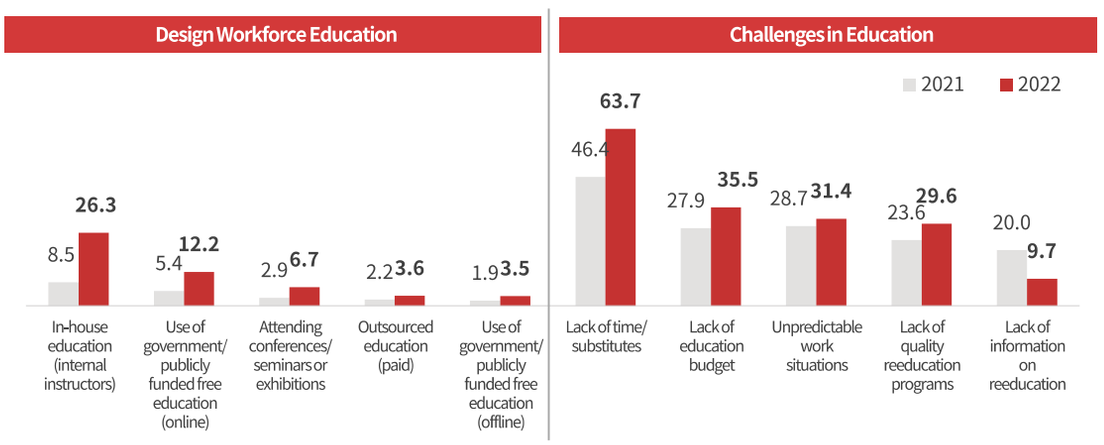
▾ **Design Workforce Recruitment Channels and Challenges** (Top 5, duplicate responses, unit: %)

Item		Recruitment Channels					Challenges in Recruitment				
		Job sites	Head-hunting of the same industry	Recruitment by referrals from acquaintances	Public institution's employment support center	Recruitment at job fairs	Seekers expectation discrepancies	No applicants with the experience required by the business	Fierce competition for workforce with other companies	No applicants with educational background/qualifications required by the business	Lack of active recruiting
Total		**88.5**	**27.7**	**21.2**	**19.5**	**10.7**	**54.5**	**50.1**	**31.0**	**30.5**	**19.0**
By industry	Product design	93.4	4.3	47.9	19.5	0.5	68.0	66.9	4.6	55.1	1.2
	Visual design	90.4	4.8	37.4	41.1	0.0	85.3	63.7	1.2	48.4	1.3
	Digital/Multimedia design	97.6	19.1	16.8	40.1	0.0	65.6	84.5	3.0	28.4	13.2
	Space design	94.2	31.0	33.3	29.3	0.4	68.1	64.3	2.3	34.2	18.7
	Fashion/Textile design	97.9	15.7	4.4	1.3	0.0	76.1	68.1	31.3	6.5	11.4
	Service/Experience design	88.7	15.3	21.5	27.9	4.1	41.0	31.4	36.2	34.3	14.5
	Industrial craft design	87.6	19.0	6.6	0.0	0.0	67.1	64.0	24.1	14.7	6.8
	Design infrastructure	77.3	51.7	1.9	2.2	34.8	29.0	24.3	77.4	17.8	37.0
By size	Large enterprise	87.0	2.4	5.1	40.6	12.3	68.8	55.2	16.5	34.9	2.4
	Middle market enterprise	75.3	33.0	34.9	41.9	0.8	62.3	33.9	41.7	55.0	3.0
	Medium enterprise	87.9	34.2	15.0	21.7	10.4	55.9	45.0	38.2	32.1	17.2
	Small enterprise	89.0	25.9	22.8	18.4	11.0	53.9	51.9	28.9	29.6	19.8

11. Design Workforce Education and Challenges

- In 2022, the most common type of design workforce education (duplicate responses) was "In-house education (internal instructors)" (26.3%), followed by "Use of government/publicly funded free education (online)" (12.2%) and “Attending conferences/seminars or exhibitions” (6.7%), etc.
- The top challenge in education (duplicate responses) was "Lack of time/substitutes“ (63.7%), followed by “Lack of education budget” (35.5%) and “Unpredictable work situations” (31.4%).
- In the challenges in education, "Lack of time/substitutes" increased (46.4% → 63.7%) and “Lack of information on reeducation” decreased (20.0% → 9.7%) compared to 2021.

▼ **Design Workforce Education and Challenges** (Top 5, duplicate responses, unit: %)



▾ **Design Workforce Education and Challenges** (Top 5, duplicate responses, unit: %)

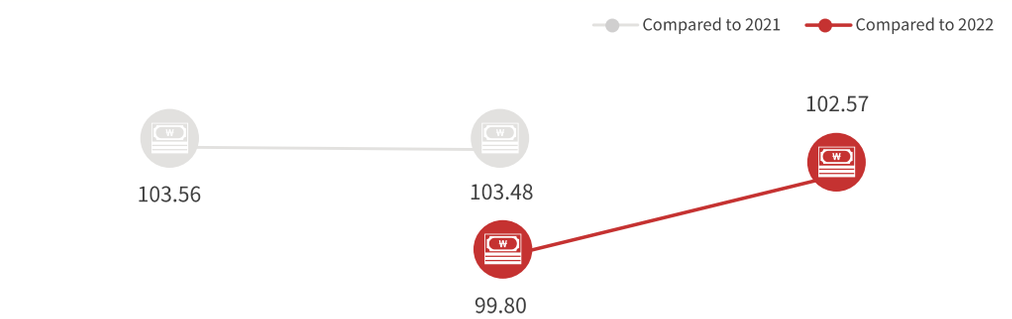
Item		Design Workforce Education					Challenges in Education				
		In-house education (Internal Instructors)	Use of government/ publicly funded free education (online)	Attending conferences, seminars, or exhibitions	Outsourced education (Paid)	Use of government/ publicly funded free education (offline)	Lack of time/ substitutes	Lack of education budget	Unpredictable work situations	Lack of quality reeducation programs	Lack of information on reeducation
Total		**26.3**	**12.2**	**6.7**	**3.6**	**3.5**	**63.7**	**35.5**	**31.4**	**29.6**	**9.7**
By industry	Product design	52.0	33.1	20.8	1.0	0.8	20.5	69.5	9.7	49.3	26.3
	Visual design	67.1	48.4	19.2	5.1	9.3	22.8	67.4	21.1	47.9	22.3
	Digital/Multimedia design	34.2	27.0	3.6	1.6	5.4	59.8	43.8	49.7	25.2	11.8
	Space design	8.1	10.0	0.8	1.2	1.2	80.8	26.5	58.8	11.0	3.8
	Fashion/Textile design	1.2	1.0	1.4	0.2	0.0	84.6	27.7	27.1	3.2	0.0
	Service/Experience design	0.3	2.4	3.5	1.5	13.9	71.8	13.8	23.6	44.0	3.8
	Industrial craft design	11.2	0.0	2.9	0.0	2.9	78.8	19.3	17.3	11.6	5.8
	Design infrastructure	37.2	0.7	6.3	8.6	0.0	69.6	31.9	22.0	32.3	9.2
By size	Large enterprise	28.3	36.4	7.6	0.8	5.4	81.2	35.9	13.4	43.1	0.0
	Middle market enterprise	24.1	24.6	11.2	2.2	26.3	60.5	24.6	36.1	28.6	10.6
	Medium enterprise	24.4	11.4	4.2	1.9	2.8	68.8	24.1	36.0	28.2	8.1
	Small enterprise	26.9	12.1	7.4	4.1	3.2	62.2	38.9	30.0	29.9	10.3

12. Outlook on the Design Investment Amount

- Compared to 2022, the outlook on 2023 design investment amounts of Companies utilizing design is expected to be 99.80% and the outlook on 2024 is expected to be 102.57%.
- By industry, the outlook is relatively high for space design in 2023 (100.79%), and for service/experience design in 2024 (105.46%).

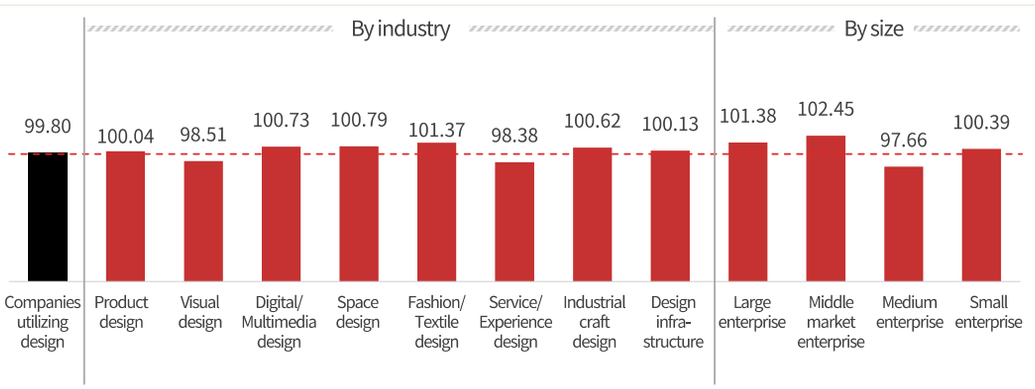
Outlook on the Design Investment Amount

(Unit : %)



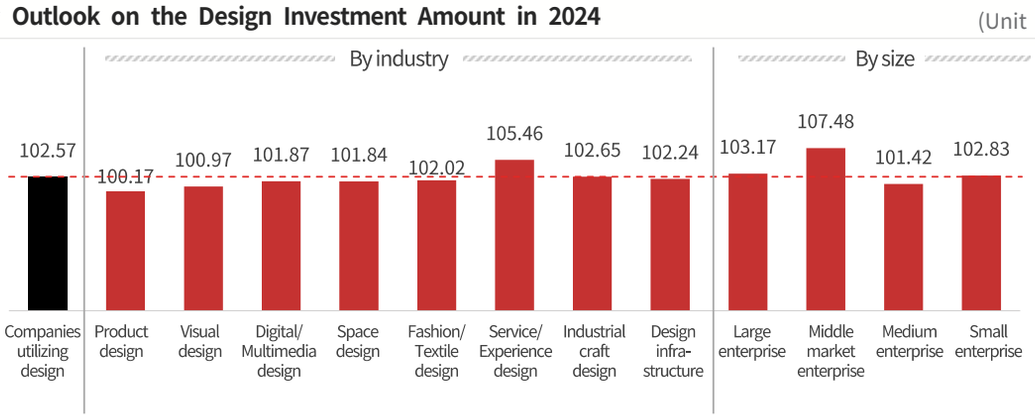
Outlook on the Design Investment Amount in 2023

(Unit : %)



Outlook on the Design Investment Amount in 2024

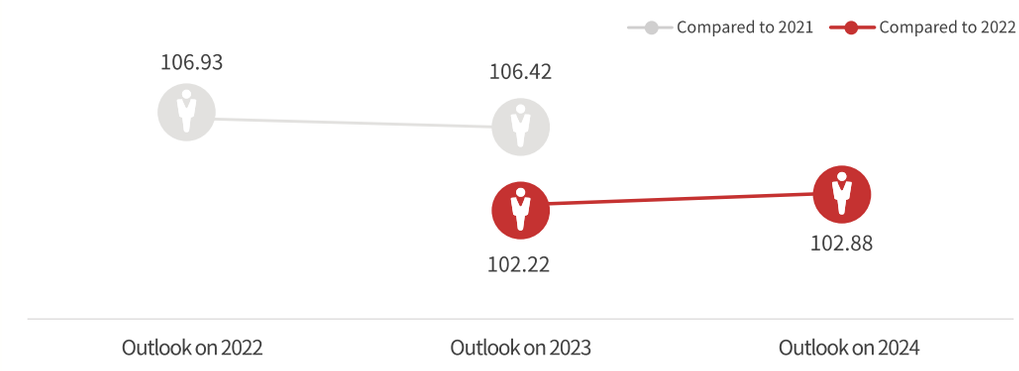
(Unit : %)



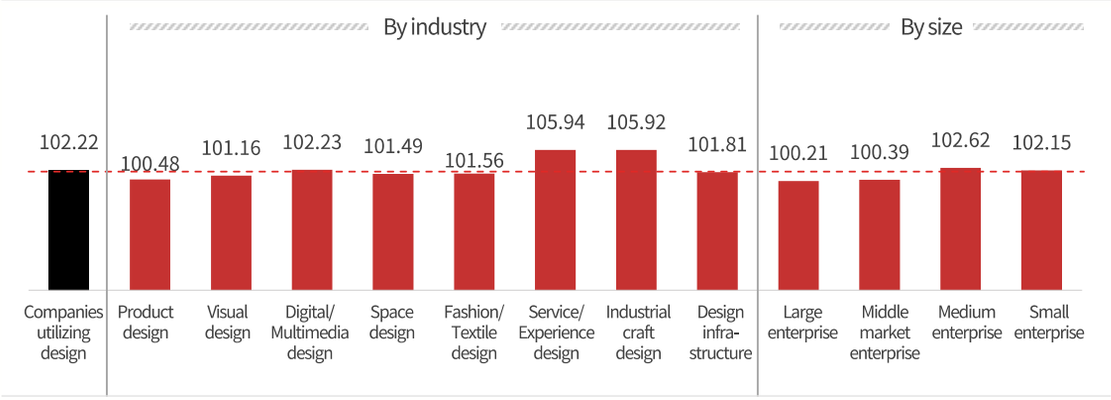
13. Outlook on Designer Hiring

- Compared to 2022, the outlook on hiring designers is expected to increase in both 2023 and 2024 (102.22% and 102.88%, respectively).
- By industry, the outlook on hiring designers is relatively high for service/experience design in 2023 (105.94%), and for industrial craft design in 2024 (108.76%).

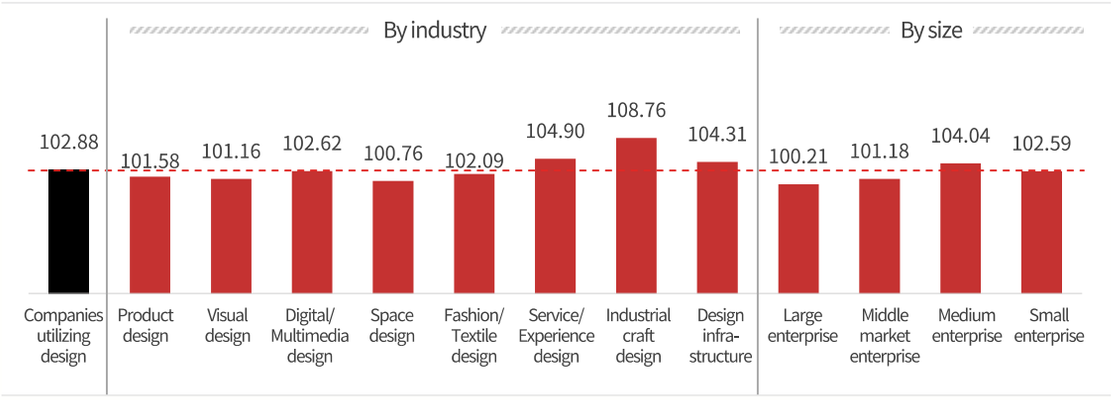
Outlook on Designer Hiring (Unit : %)



Outlook on Designer Hiring in 2023 (Unit : %)



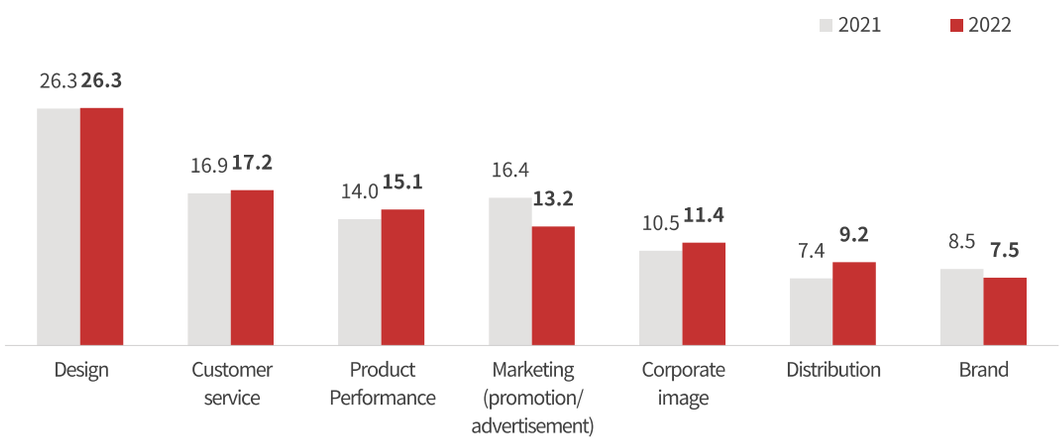
Outlook on Designer Hiring in 2024 (Unit : %)



14. Percentage of Factors Influencing Product Sales

- As for factors influencing product sales of Companies utilizing design, "Design“ was the highest(26.3%), followed by "Customer service" (17.2%) and “Product performance” (15.1%), etc.
- By industry, the percentage of the "Design" factor was higher in fashion/textile design (36.7%) and digital/multimedia design (35.2%) compared to other industries.

▾ **Percentage of Factors Influencing Product Sales** (Unit : %)



▾ **Percentage of Factors Influencing Product Sales** (Unit : %)

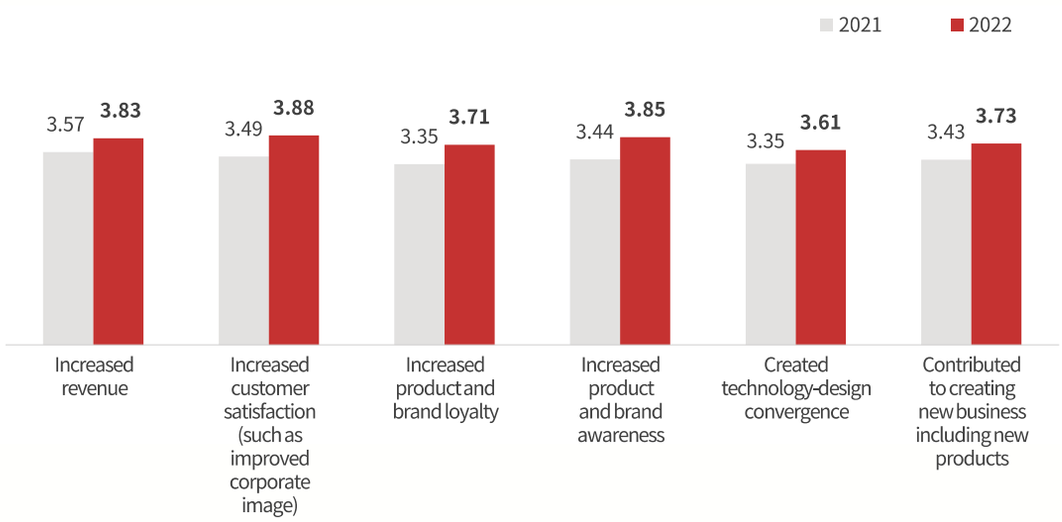
Item		Design	Customer service	Product perfor-mance	Marketing (PR/ advertising)	Corporate image	Distri-bution	Brand
Total		**26.3**	**17.2**	**15.1**	**13.2**	**11.4**	**9.2**	**7.5**
By industry	Product design	28.0	12.6	11.1	14.7	11.2	9.3	13.0
	Visual design	26.6	14.4	8.7	15.9	11.5	10.4	12.5
	Digital/Multimedia design	35.2	15.3	10.9	15.8	9.5	4.3	9.1
	Space design	27.6	15.7	18.4	12.6	10.8	5.6	9.1
	Fashion/Textile design	36.7	10.2	11.0	8.3	5.3	18.3	10.2
	Service/Experience design	24.7	28.3	17.2	13.1	10.6	2.8	3.2
	Industrial craft design	29.1	31.8	4.3	4.8	4.4	22.1	3.5
	Design infrastructure	22.8	11.8	16.8	13.3	14.3	14.8	6.1
By size	Large enterprise	18.5	23.0	22.8	11.4	14.5	2.3	7.5
	Middle market enterprise	22.8	18.9	26.2	9.6	8.7	4.9	8.9
	Medium enterprise	26.7	18.4	14.1	14.7	11.8	7.9	6.3
	Small enterprise	26.4	16.8	15.1	12.8	11.3	9.8	7.9

※ Some of the items changed.
‘Product brand’ → ‘Brand’, ‘Performance’ → ‘Product performance’

15. Design Investment and Utilization Contributions

- Design investment and utilization contributions (out of 5) were indicated high in "Improved customer satisfaction" (3.88), “Increased product and brand awareness” (3.85) and "Increased revenue" (3.83).
- Most items of design contribution were indicated high in fashion/textile design.

▾ **Design Investment and Utilization Contributions** (Unit : points)



▾ **Design Investment and Utilization Contributions** (Unit : points)

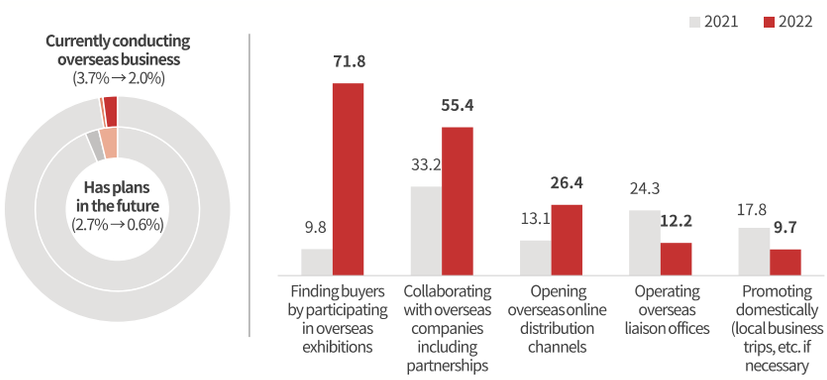
Item		Increased revenue	Improved customer satisfaction (such as improved corporate image)	Increased product and brand loyalty	Increased product and brand awareness	Created technology-design convergence	Contributed to creating new businesses including new products
Total		**3.83**	**3.88**	**3.71**	**3.85**	**3.61**	**3.73**
By industry	Product design	3.73	3.70	3.57	3.44	3.47	3.52
	Visual design	3.68	3.62	3.55	3.58	3.35	3.45
	Digital/Multimedia design	3.87	3.83	3.62	3.75	3.56	3.51
	Space design	3.82	3.75	3.66	3.67	3.67	3.47
	Fashion/Textile design	4.31	4.31	4.26	4.27	3.96	3.97
	Service/Experience design	3.78	4.14	3.83	3.83	3.81	4.06
	Industrial craft design	3.77	3.79	3.54	3.60	3.25	3.32
	Design infrastructure	3.90	3.82	3.67	4.20	3.52	3.81
By size	Large enterprise	3.51	3.71	3.52	3.99	3.32	3.69
	Middle market enterprise	3.86	4.00	3.64	3.76	3.83	3.95
	Medium enterprise	3.85	3.97	3.79	3.84	3.71	3.85
	Small enterprise	3.83	3.85	3.68	3.86	3.58	3.69

16. Overseas Business Status

- The percentage of respondents who are "Currently conducting" overseas business has decreased slightly compared to 2021 (3.7% → 2.0%), with the most common business methods (duplicate responses) being "Finding buyers by participating in overseas exhibitions" (71.8%).
- Region of exchange was highest in “Asia” (68.0%), followed by “The Americas” (55.6%), “Europe” (22.0%), “China” (12.6%), etc.
- Demand for Government Support for International Expansion was highest for “Export support fund” (41.5%), followed by “Overseas buyer consultation meetings” (30.9%), “Overseas market research” (29.1%).

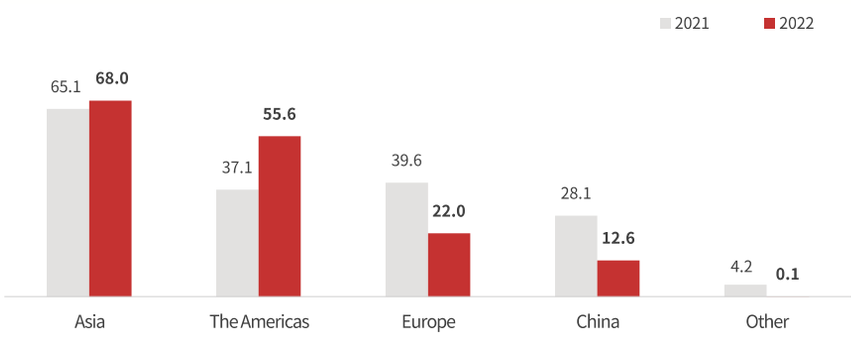
▾ Overseas Business Status and Method

(Duplicate responses, unit: %)



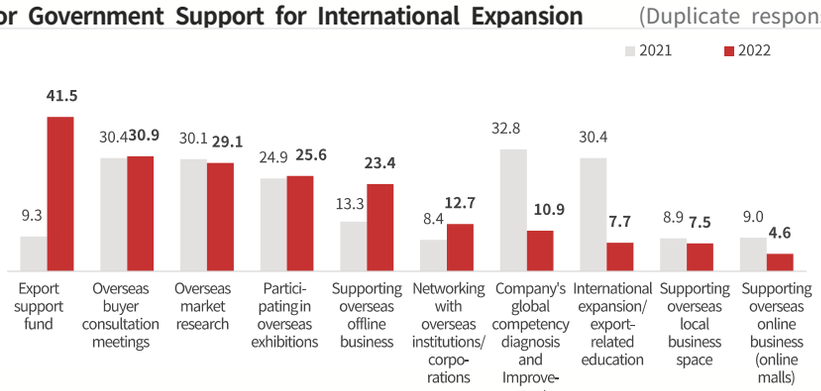
▾ Overseas Exchange Region

(Duplicate responses, unit: %)



▾ Demand for Government Support for International Expansion

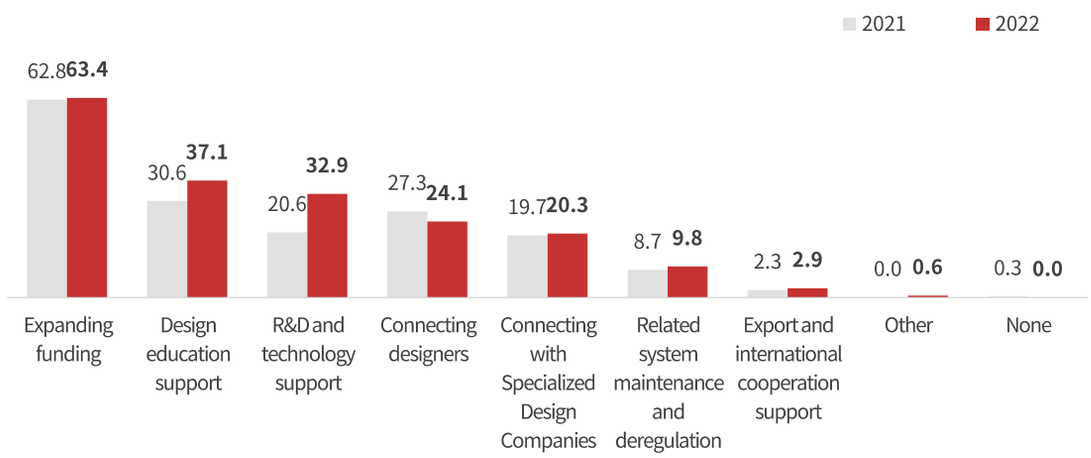
(Duplicate responses, unit: %)



17. Demand for Design-related Government Support

- The design-related government support(duplicate responses) was highest for "Expanding funding" (63.4%).
- Compared to 2021, "Design education support" (30.6% → 37.1%) and "R&D and technology support" (20.6% → 32.9%) increased.

▾ **Demand for Design-related Government Support** (Duplicate responses, unit: %)



▾ **Demand for Design-related Government Support** (Duplicate responses, unit: %)

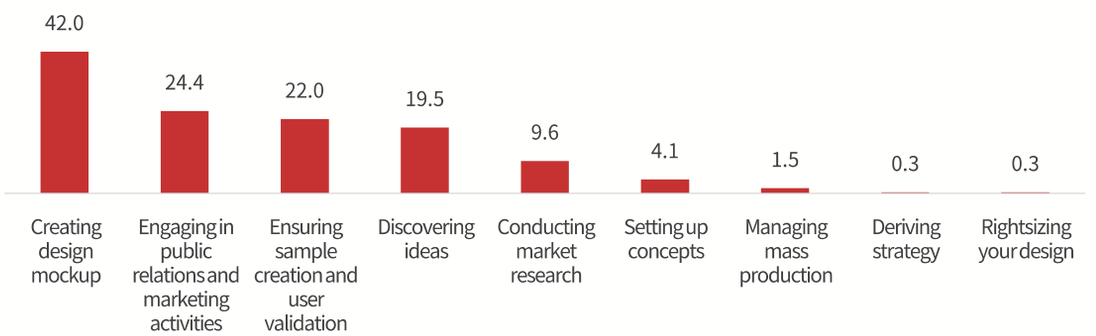
Item		Expanding funding (loans, grants, etc.)	Supporting design education	R&D and technical support	Connecting with designers (including internship support)	Connecting with Specialized Design Companies	Related system maintenance and deregulation	Export and international cooperation support	None
Total		**63.4**	**37.1**	**32.9**	**24.1**	**20.3**	**9.8**	**2.9**	**0.6**
By industry	Product design	87.8	40.0	43.3	5.3	20.4	2.8	0.4	0.0
	Visual design	94.9	35.1	40.1	5.0	22.6	1.4	0.0	0.0
	Digital/Multimedia design	84.8	45.2	33.8	16.1	2.7	16.4	0.9	0.0
	Space design	80.0	25.4	25.5	33.7	6.5	27.0	1.8	0.0
	Fashion/Textile design	31.0	65.3	23.2	51.2	20.8	4.7	0.0	0.0
	Service/Experience design	30.2	26.7	46.6	30.9	29.9	3.9	6.7	2.7
	Industrial craft design	58.8	44.9	33.5	25.3	10.3	11.0	1.8	0.0
	Design infrastructure	64.3	45.6	21.0	22.5	23.9	8.9	3.1	0.0
By size	Large enterprise	46.2	24.9	50.6	43.8	26.4	2.0	1.7	0.0
	Middle market enterprise	59.6	48.5	39.8	20.3	15.0	6.5	8.8	0.0
	Medium enterprise	56.1	35.0	38.7	27.7	19.4	8.2	3.0	0.6
	Small enterprise	65.9	37.6	30.8	22.8	20.6	10.5	2.8	0.7

18. Design Trend

- Stage where company utilized new technologies in its design work (new software technologies such as Internet of Things, OpenAI, etc.) was highest in “Creating design mockup” (42.0%), followed by “Engaging in public relations and marketing activities” (24.4%), “Ensuring sample creation and user validation” (22.0%), etc.
- Consideration for eco-friendliness factors when developing designs was 17.5%.
- For challenges when developing designs considering eco-friendliness factors, “Lack of knowledge/know-how” (44.9%) was highest, followed by “Decreased price competitiveness” (43.8%), “Lack of experts and specialists” (42.8%).

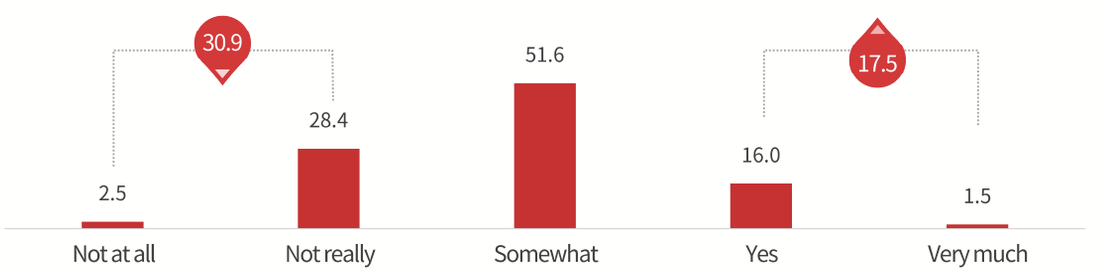
Stage where company utilized new technologies in its design work

(Duplicate responses, unit: %)



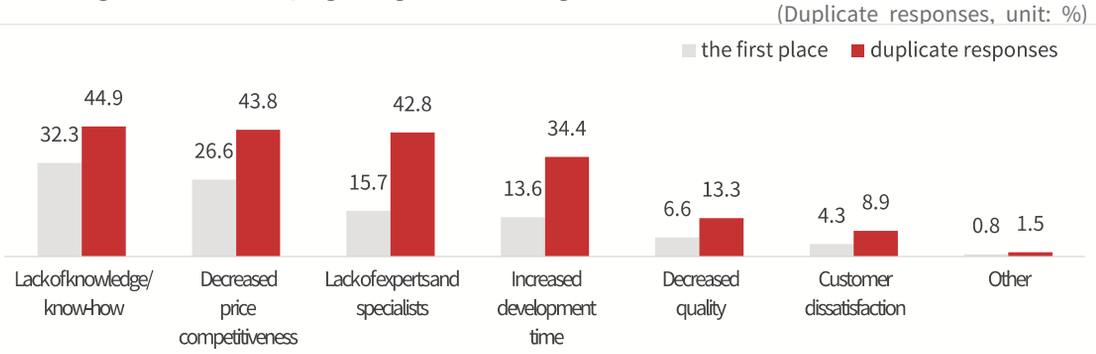
Consideration for eco-friendliness factors when developing designs

(unit: %)



Challenges when developing designs considering eco-friendliness factors

(Duplicate responses, unit: %)



※ Design Trend has been added since this year.

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02

Specialized Design Companies

1. Specialized Design Companies' Fields for Providing Design
2. Financial and Business Expense Status of Specialized Design Companies
3. Status by Design Service Contract Type
4. Percentage of Revenue and the Number of Cases by Revenue Composition
5. Workforce Status
6. Status of Design Workforce Job Openings/Recruitment/Retirements
7. Design Workforce Recruitment Channels and Challenges
8. Design Workforce Education and Challenges
9. Outlook on Revenue
10. Outlook on Design Business Expenses
11. Outlook on Designer Hiring
12. Overseas Business Status and Methods
13. Demand for Design-related Government Support
14. Design Trend

DESIGN
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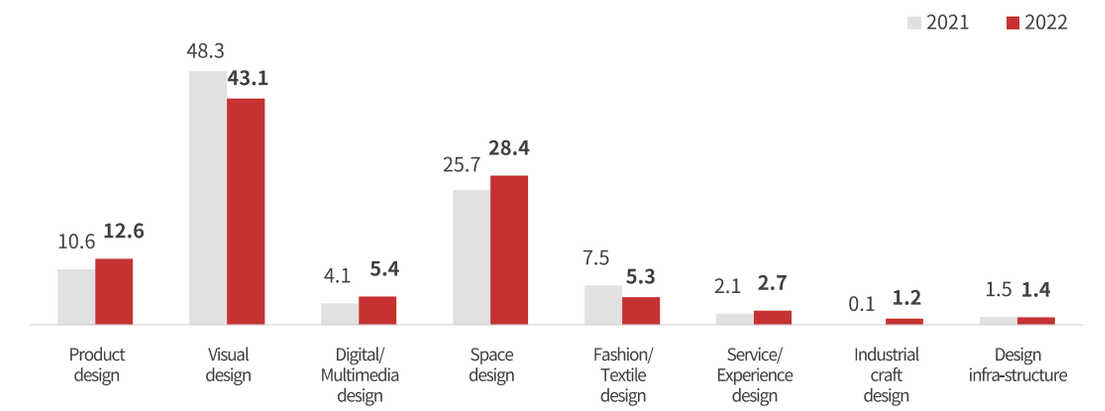
1. Specialized Design Companies' Fields for Providing Design

- As for Specialized Design Companies' fields for providing design, "Visual design" (43.1%) was highest, followed by "Space design" (28.4%).
- "Visual design" decreased compared to 2021 (48.3% → 43.1%), while "Space design" increased (25.7% → 28.4%).

▾ **Specialized Design Companies' Fields for Providing Design** (Unit : %)



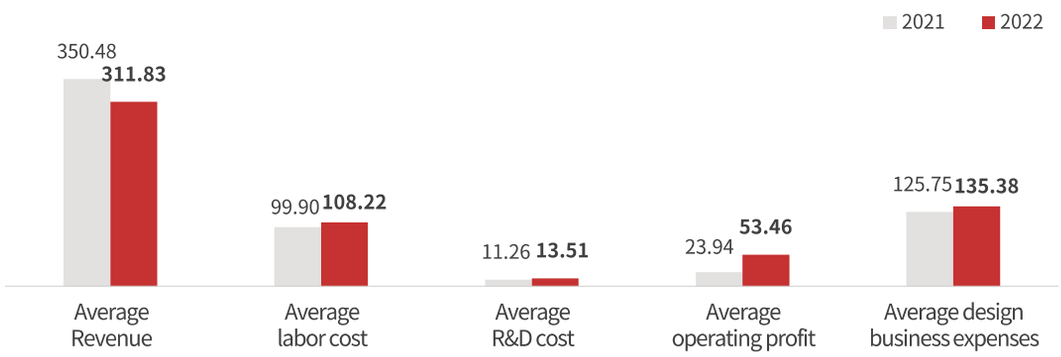
▾ **Specialized Design Companies' Fields for Providing Design** (Unit : %)

Item		Product design	Visual design	Digital media design	Space design	Fashion/ Textile design	Services/ Experience design	Industrial craft design	Design infra-structure
Total		**12.6**	**43.1**	**5.4**	**28.4**	**5.3**	**2.7**	**1.2**	**1.4**
By industry	Product design	49.2	24.6	2.8	8.8	3.6	8.0	1.5	1.5
	Visual design	7.7	66.7	8.1	12.7	0.6	1.6	1.7	0.9
	Interior design	1.3	8.0	1.7	83.5	0.3	2.1	0.3	2.8
	Fashion, textiles, and other design	2.5	23.3	3.0	23.6	44.9	1.3	0.3	1.1
By size	1 person	11.7	45.4	4.5	28.1	4.8	2.7	1.5	1.3
	2–4 people	13.3	37.4	6.9	30.4	7.3	2.3	0.5	1.7
	5–9 people	20.2	35.9	8.0	26.3	4.6	2.8	0.1	2.0
	10–14 people	19.2	37.0	12.5	24.9	2.9	2.4	0.0	1.0
	15 people or more	12.1	30.8	13.0	25.8	6.8	7.7	0.2	3.7

2. Financial and Business Expense Status of Specialized Design Companies

- In 2022, "Revenue" averaged 311.83 million won, which decreased compared to 2021 (350.48 million won).
- While “Operating profit” averaged 53.46 million won, which increased compared to 2021 (23.94 million won),
- For the business expense, “Labor cost” was highest by an average of 87.16 million won.

▾ **Financial and Business Expense Status of Specialized Design Companies** (Unit : million won)



▾ **Financial and Investment Status in 2022** (Unit : million won)

Item		Revenue	Labor cost	R&D cost	Operating profit	Design business expenses
Total		**311.83**	**108.22**	**13.51**	**53.46**	**135.38**
By industry	Product design	369.63	120.30	18.00	52.72	123.87
	Visual design	235.83	102.20	16.56	41.96	117.00
	Interior design	423.33	116.77	4.19	83.80	197.49
	Fashion, textiles, and other design	380.72	101.49	9.98	49.71	116.34
By size	1 person	141.32	61.31	9.24	20.72	77.34
	2–4 people	416.94	176.67	11.35	116.88	255.35
	5–9 people	899.63	251.62	27.45	145.10	314.16
	10–14 people	1,432.72	301.98	49.00	196.04	314.14
	15 people or more	5,074.49	998.98	205.61	450.51	727.94

▼ **Business Expenses in 2022**

(Unit : million won)

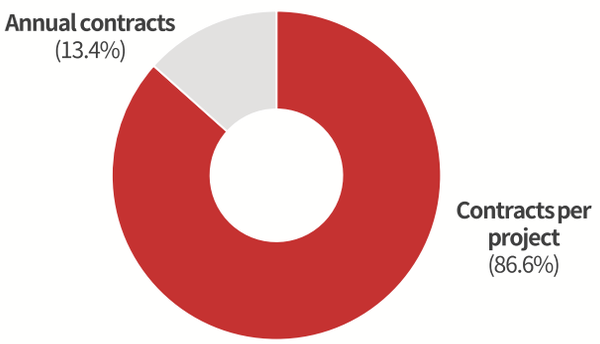
Item		Labor cost	Service charge	Other service costs	Equip-ment and software	Land/ Buildings for R&D	Education cost	Intellec-tual property purchase manage-ment cost	Other current expenses
Total		**87.16**	**13.32**	**9.15**	**2.08**	**2.75**	**0.18**	**1.21**	**19.53**
By industry	Product design	79.11	6.17	22.99	1.45	2.74	0.11	1.22	10.06
	Visual design	76.89	5.82	7.70	2.64	2.70	0.19	1.55	19.52
	Interior design	122.48	39.39	4.08	0.93	1.73	0.19	0.11	28.57
	Fashion, textiles, and other design	77.93	8.17	4.93	2.63	5.32	0.23	1.79	15.35
By size	1 person	54.05	4.06	4.00	1.72	2.16	0.07	0.46	10.81
	2–4 people	143.80	45.89	15.79	2.54	2.67	0.30	0.65	43.72
	5–9 people	209.00	18.78	45.23	3.50	7.20	0.51	2.50	27.44
	10–14 people	243.80	5.49	23.24	5.46	7.00	1.23	1.32	26.59
	15 people or more	456.32	43.62	31.56	5.73	14.08	2.15	51.14	123.34

3. Status by Design Service Contract Type

- By design service contract type, the percentage of “Contracts per project” was 86.6%, and “Annual contracts” is 13.4%.
- The percentage of quality satisfaction was 62.2% in “Contracts per project”, and 51.1% in “Annual contracts”.

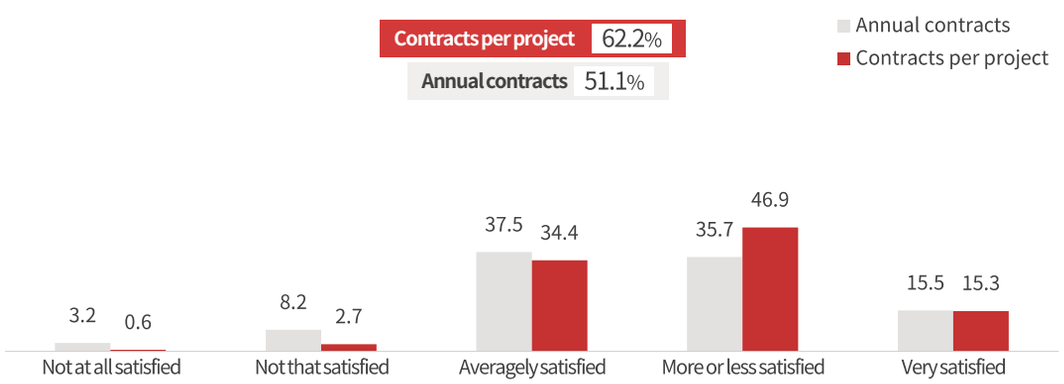
▾ **The percentage of company’s design services by contract type**

(Based on companies experienced design outsourcing, Unit : %)



▾ **The level of satisfaction by contract type**

(Based on companies experienced design outsourcing, Unit : %)

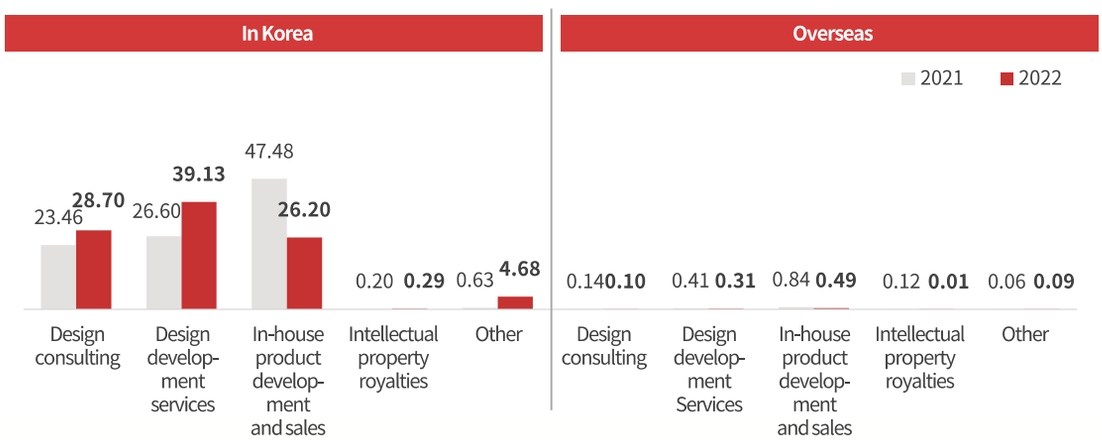


※ Status by Design Service Contract Type has been added since this year.

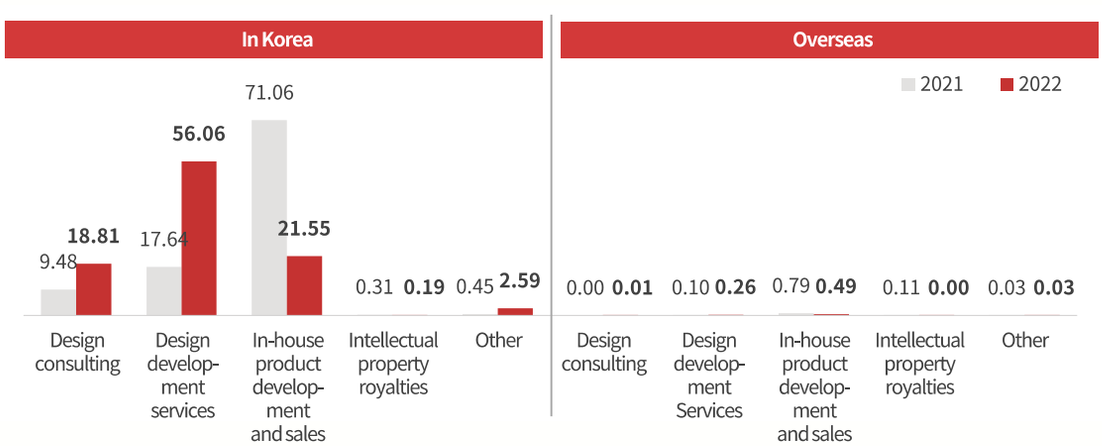
4. Percentage of Revenue and the Number of Cases by Revenue Composition

- By revenue composition, “Design development services” (39.13%), “Design consulting” (28.70%) and “In-house product development and sales” (26.20%) were high.
- By number of revenue cases, “Design development services” (56.06%), "In-house product development and sales” (21.55%) and “Design consulting” (18.81%) were high.
- By both revenue and the number of cases, the percentage of "In-house product development and sales” decreased compared to 2021.

▼ **Percentage by Revenue Composition (Percentage of Revenue)** (Unit : %)



▼ **Percentage of Revenue by Composition (Based on Number of Cases)** (Unit : case)

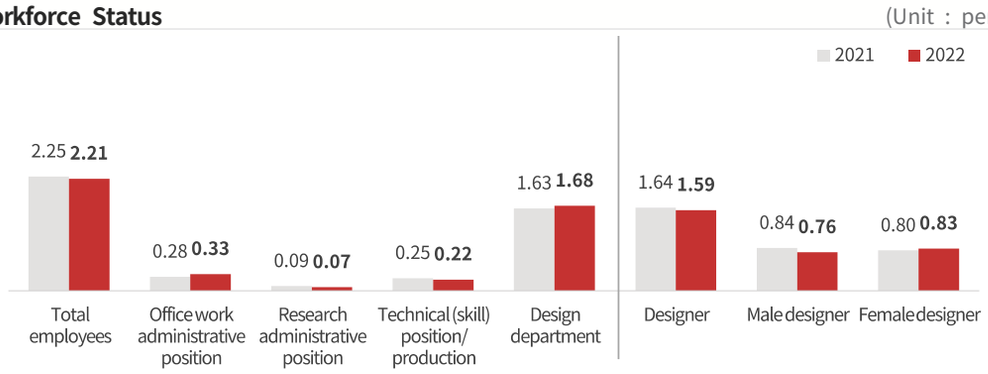


5. Workforce Status

- The total number of employees averaged 2.21 and design department employees averaged 1.68 in 2022.
- The number of designers averaged 1.59, and the number of “Female designer” (0.83) was higher than “Male designer” (0.76).
- "40s" (0.50) was high by age, “Vice president/President” (0.72) by position, and "College graduate" (1.28) by education.

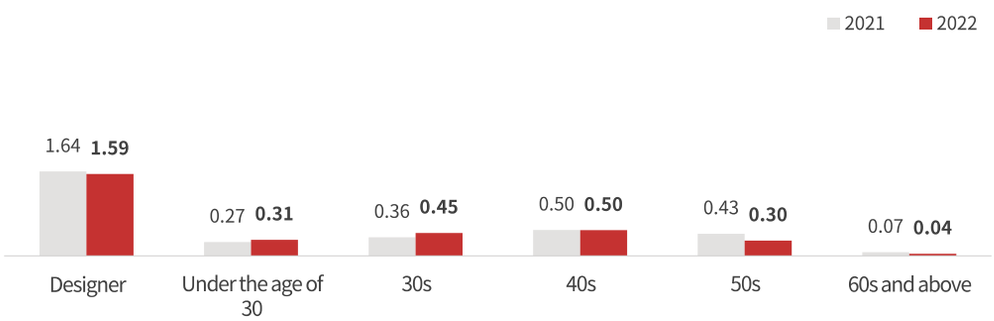
Workforce Status

(Unit : person)



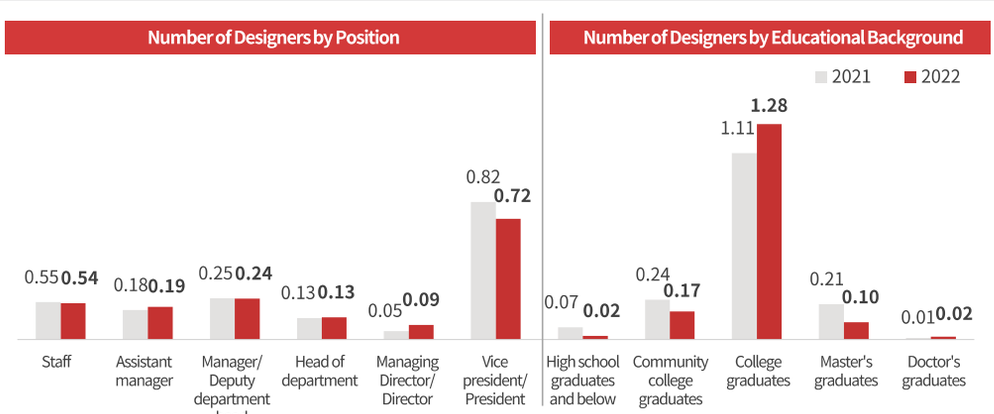
Number of Designers by Age

(Unit : person)



Number of Designers by Position and Educational Background

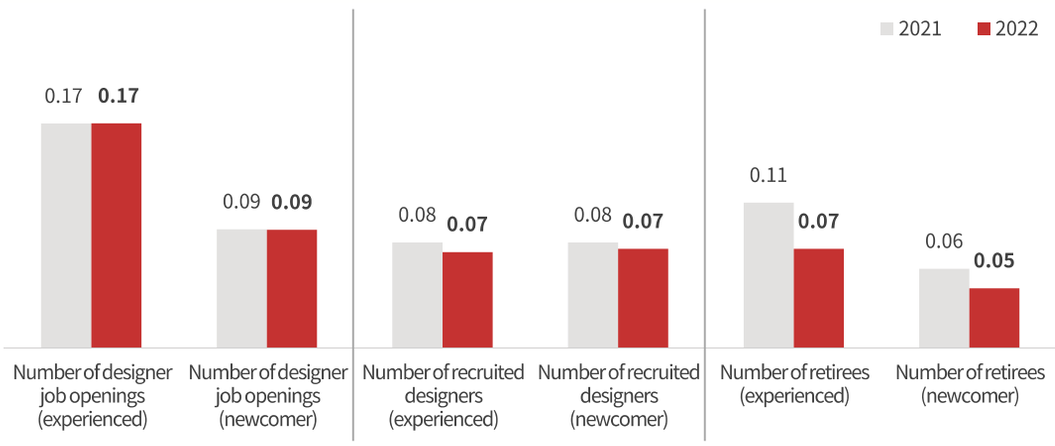
(Unit : person)



6. Status of Design Workforce Job Openings/Recruitment/Retirements

- In 2022, the number of designer job openings (experienced) averaged 0.17, which was higher than 0.09 for newcomer.
- The number of recruited designers (both experienced and newcomer) was 0.07.
- The number of retirees was 0.07 for experienced and 0.05 for newcomer.

▾ **Status of Design Workforce Job Openings/Recruitment/Retirements** (Unit : person)



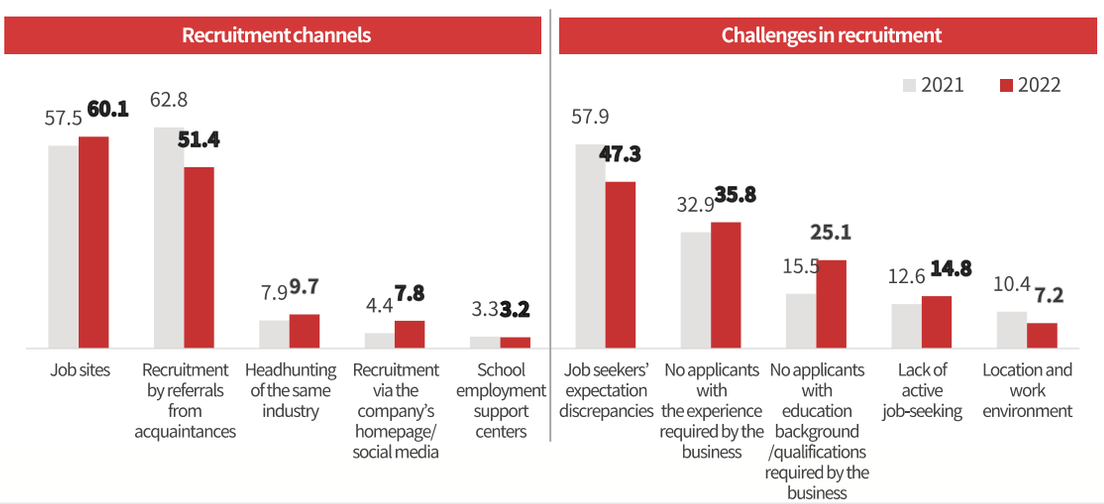
▾ **Status of Design Workforce Job Openings/Recruitment/Retirements** (Unit : person)

Item		Designer job openings (experienced)	Designer job openings (newcomer)	Number of recruited designers (experienced)	Number of recruited designers (newcomer)	Number of retirees (experienced)	Number of retirees (newcomer)
Total		**0.17**	**0.09**	**0.07**	**0.07**	**0.07**	**0.05**
By industry	Product design	0.23	0.12	0.11	0.10	0.10	0.04
	Visual design	0.18	0.09	0.06	0.08	0.08	0.05
	Interior design	0.12	0.05	0.07	0.04	0.05	0.02
	Fashion, textiles, and other design	0.11	0.11	0.06	0.10	0.06	0.08
By size	1 person	0.10	0.02	0.03	0.02	0.03	0.03
	2–4 people	0.28	0.20	0.10	0.16	0.11	0.03
	5–9 people	0.33	0.36	0.24	0.32	0.24	0.21
	10–14 people	0.57	0.36	0.36	0.32	0.21	0.12
	15 people or more	1.59	1.20	1.36	0.91	1.25	0.45

7. Design Workforce Recruitment Channels and Challenges

- The most common channel of recruiting design workforce (duplicate responses) was "Job sites" (60.1%), followed by "Recruitment by referrals from acquaintances" (51.4%).
- As for challenges in recruitment (duplicate responses), "Seekers' expectation discrepancies" was the most common (47.3%), followed by "No applicants with the experience required by the business" (35.85%).

▼ **Design Workforce Recruitment Channels and Challenges** (Top 5, duplicate responses, unit: %)



▾ **Design Workforce Recruitment Channels and Challenges**

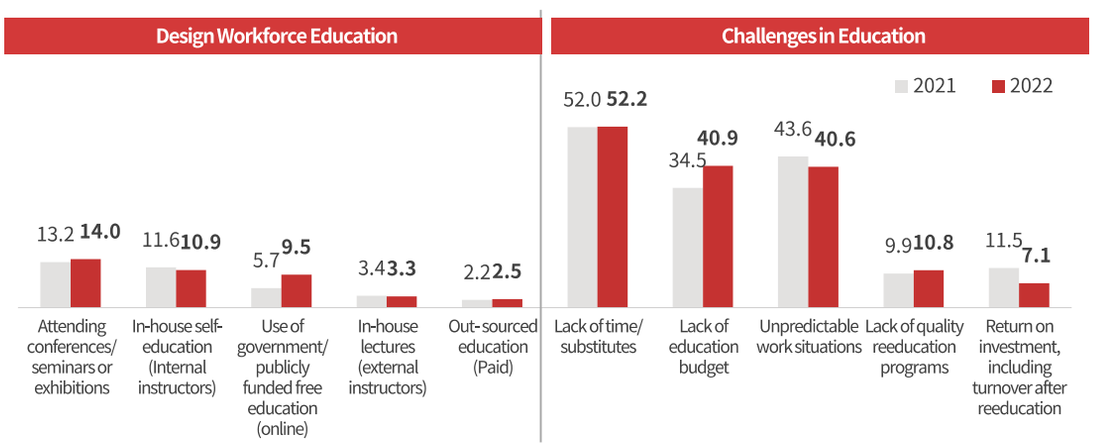
(Top 5, duplicate responses, unit: %)

Item		Recruitment channels					Challenges in recruitment				
		Job sites	Recruitment by referrals from acquaintances	Headhunting of the same industry	Recruitment via the company's homepage/social media	School employment support centers	Job seekers' expectation discrepancies	No applicants with the experience required by the business	No applicants with education background/qualifications required by the business	Lack of active job-seeking	Location and work environment
Total		**60.1**	**51.4**	**9.7**	**7.8**	**3.2**	**47.3**	**35.8**	**25.1**	**14.8**	**7.2**
By industry	Product design	57.8	64.2	5.0	12.6	3.7	43.0	40.1	32.9	14.5	8.9
	Visual design	52.8	51.0	7.1	4.5	2.8	50.0	36.6	17.6	12.7	5.8
	Interior design	73.1	43.2	19.1	12.3	4.8	43.0	34.8	37.5	13.2	9.5
	Fashion, textiles, and other design	74.6	49.9	10.5	7.7	1.1	48.9	26.1	25.1	30.6	7.3
By size	1 person	55.9	53.9	7.1	5.2	2.7	50.5	33.0	20.8	12.7	6.1
	2–4 people	71.5	44.6	16.8	15.6	3.9	38.6	42.7	35.4	22.5	10.8
	5–9 people	70.6	48.1	17.7	12.5	5.9	37.5	43.9	37.2	18.3	9.7
	10–14 people	72.1	44.0	4.9	16.2	5.4	41.8	39.7	40.0	12.4	11.3
	15 people or more	71.4	28.9	18.1	13.2	9.2	38.1	54.1	48.9	7.2	3.0

8. Design Workforce Education and Challenges

- For designer workforce education in 2022 (duplicate responses), "Attending conferences/seminars or exhibitions" (14.0%) was highest, followed by "In-house education (internal instructors)" (10.9%), “Use of government/publicly funded free education (online)“ (9.5%), etc.
- For challenges in education (duplicate responses), the most common challenge was "Lack of time and substitutes" (52.2%), followed by “Lack of education budget” (40.9%) and "Unpredictable work situations" (40.6%).

▾ **Design Workforce Education and Challenges** (Top 5, duplicate responses, unit: %)



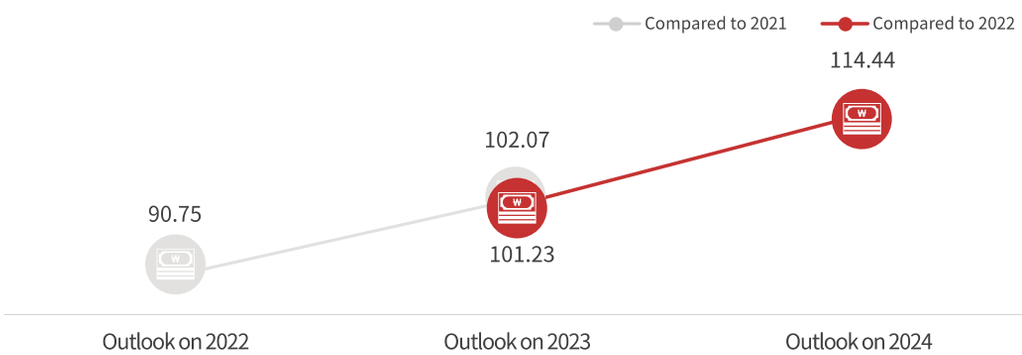
▾ **Design Workforce Education and Challenges** (Top 5, duplicate responses, unit: %)

Item		Design Workforce Education					Challenges in Education				
		Attending conferences/ seminars or exhibitions	In-house self-education (Internal instructors)	Use of government/ publicly funded free education (online)	In-house lectures (external instructors)	Out-sourced education (Paid)	Lack of time/ substitutes	Lack of education budget	Unpredictable work situations	Lack of quality reeducation programs	Return on investment, including turnover after reeducation
Total		**14.0**	**10.9**	**9.5**	**3.3**	**2.5**	**52.2**	**40.9**	**40.6**	**10.8**	**7.1**
By industry	Product design	22.0	7.8	17.2	1.8	9.0	50.9	49.9	43.4	13.0	12.7
	Visual design	13.6	13.1	9.0	4.5	1.0	56.3	37.3	38.5	8.8	4.9
	Interior design	9.8	10.0	7.3	1.9	1.9	45.3	38.8	43.6	12.8	1.8
	Fashion, textiles, and other design	12.6	6.1	3.8	2.0	1.2	47.7	49.8	40.5	13.3	22.1
By size	1 person	11.4	7.2	6.1	2.5	1.6	47.7	40.9	40.9	9.0	7.1
	2–4 people	19.0	19.1	16.6	4.2	3.8	64.9	39.4	40.0	16.4	7.0
	5–9 people	25.5	24.6	22.2	5.7	6.3	64.1	41.4	38.5	15.5	6.2
	10–14 people	28.8	19.5	25.1	16.2	9.9	55.7	49.6	46.1	9.3	9.9
	15 people or more	25.4	35.0	24.3	10.1	11.0	64.9	47.2	33.9	8.8	10.7

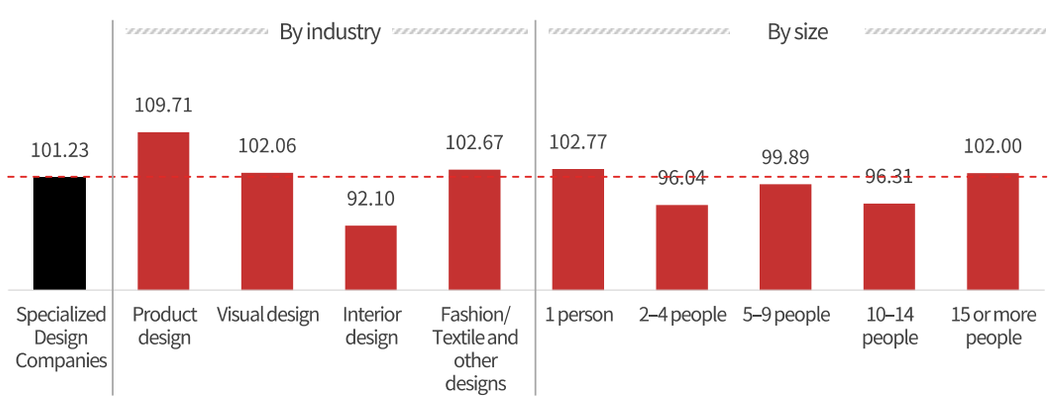
9. Outlook on Revenue

- Compared to 2022, revenue is expected to increase in both 2023 and 2024
- By industry, product design is relatively high in 2023 (109.71%) and so is fashion/textile and other designs in 2024 (125.02%).

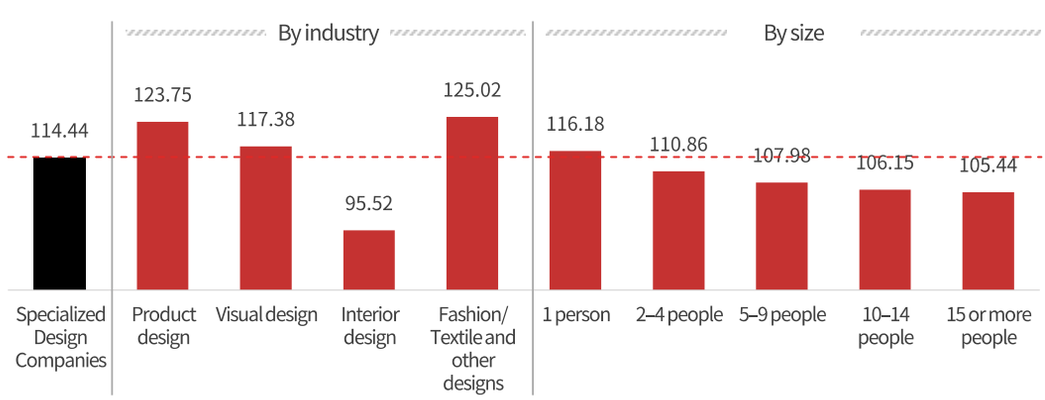
Outlook on Revenue (Unit : %)



Outlook on Revenue in 2023 (Unit : %)



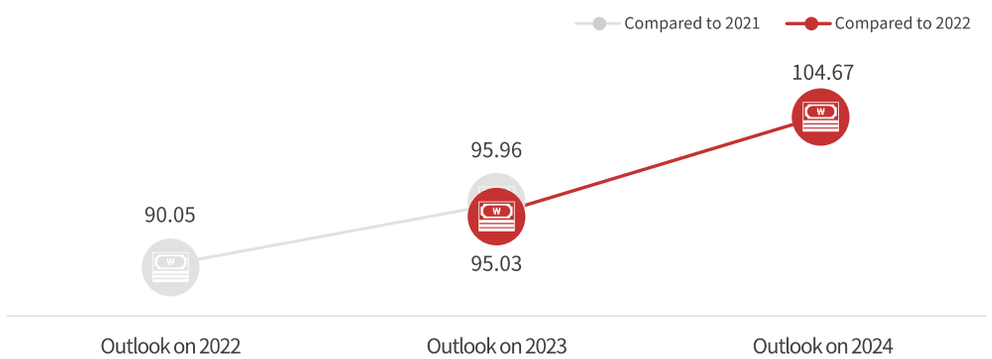
Outlook on Revenue in 2024 (Unit : %)



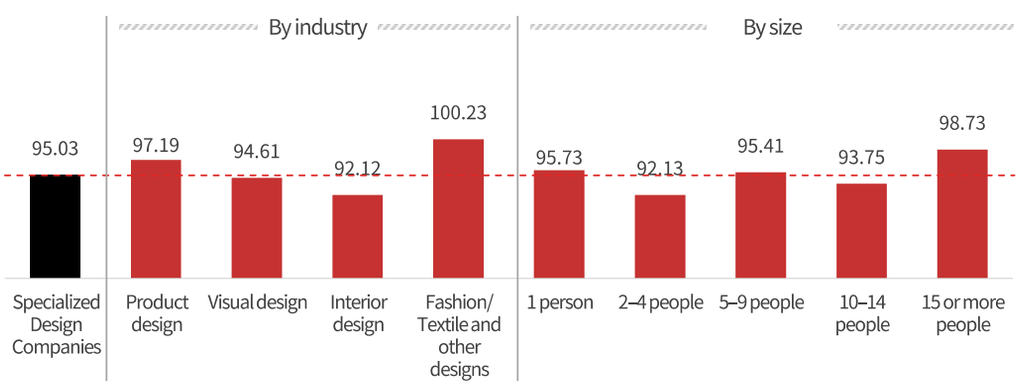
10. Outlook on Design Business Expenses

- Design business expense is expected to decrease (95.03%) in 2023 and increase (104.67%) in 2024.
- By industry, outlook on fashion/textile and other designs is relatively high in both 2023 and 2024.

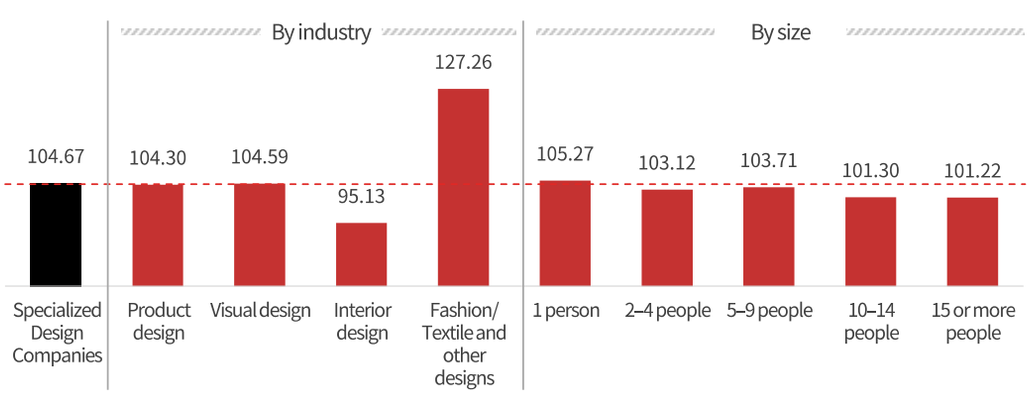
Outlook on Design Business Expenses (Unit : %)



Outlook on Design Business Expenses in 2023 (Unit : %)



Outlook on Design Business Expenses in 2024 (Unit : %)

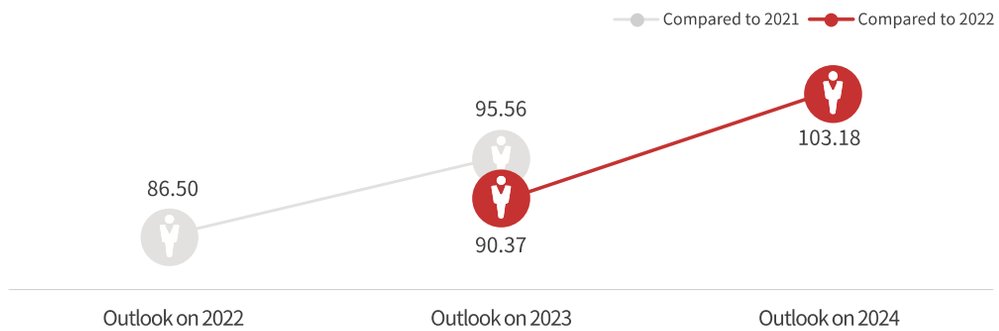


11. Outlook on Designer Hiring

- Compared to 2022, outlook on designer hiring is expected to decrease (90.37%) in 2023 and increase (103.18%) in 2024.
- A positive outlook is shown in product design (109.14%) and 1 employee (107.34%) for 2024.

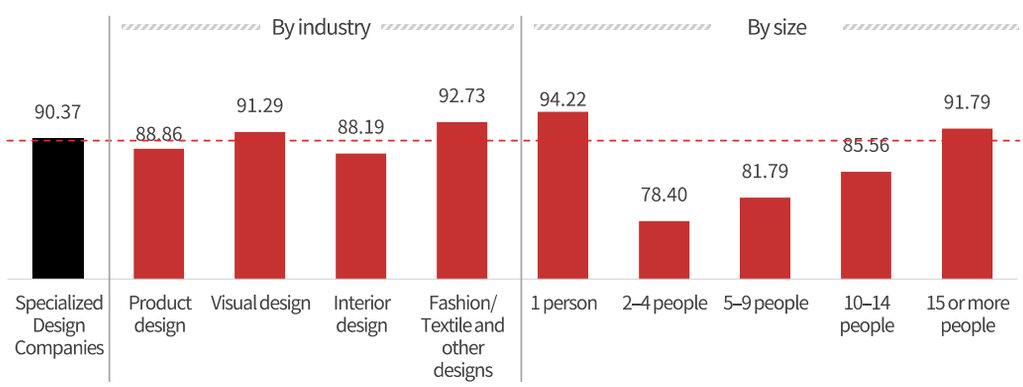
Outlook on Designer Hiring

(Unit : %)



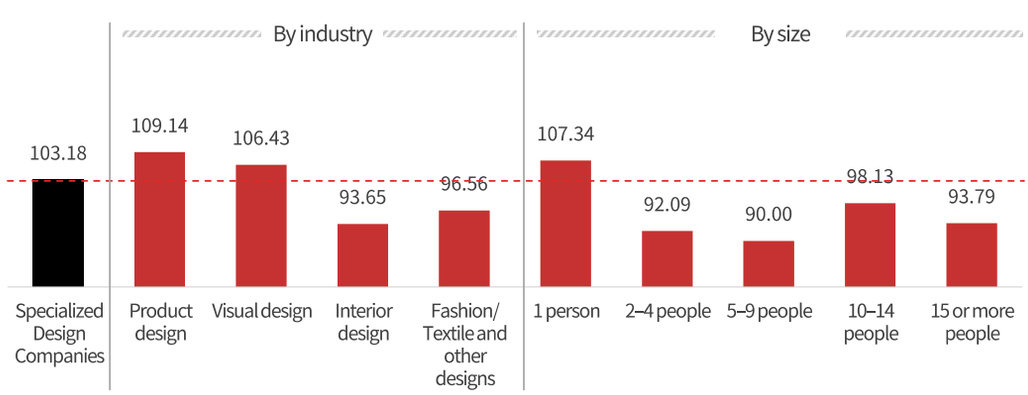
Outlook on Designer Hiring in 2023

(Unit : %)



Outlook on Designer Hiring in 2024

(Unit : %)

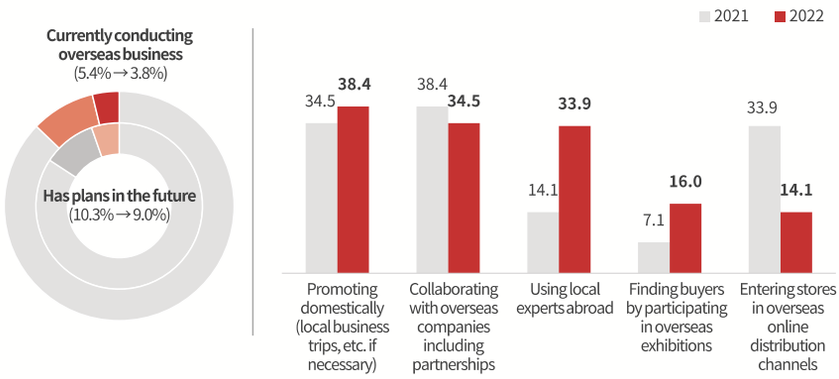


12. Overseas Business Status and Methods

- The rate of "Currently conducting overseas business“ was 3.8%, a slight decrease from 2021 (5.4%). For business methods, “Promoting domestically" (38.4%) was highest.
- Region for international expansion was highest in "Asia" (43.0%) and the highest desired regions for expansion were "China" (39.5%) and “The Americas” (38.8%).
- Government support for international expansion (duplicate responses) was high in “Participating in overseas exhibitions” (31.2%), “International expansion/export-related education” (27.3%) and “Export support fund” (26.9%).

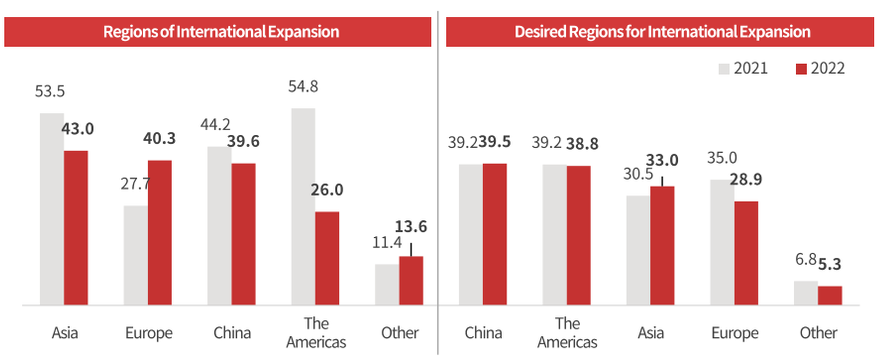
▾ Overseas Business Status and Methods

(Top 5, duplicate responses, unit: %)



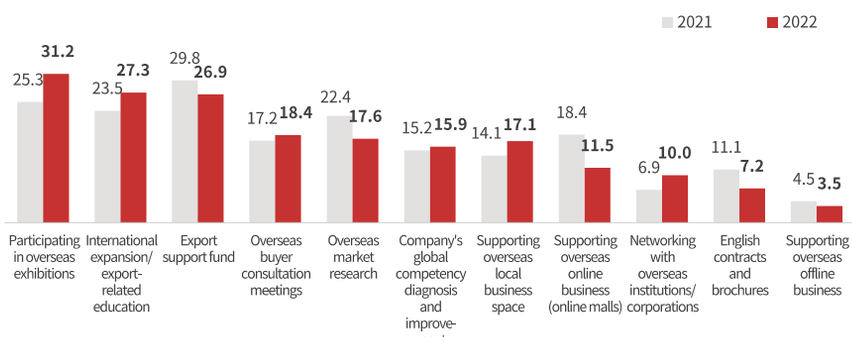
▾ Regions of and Desired Regions for International Expansion

(Duplicate responses, unit: %)



▾ Government Support for International Expansion

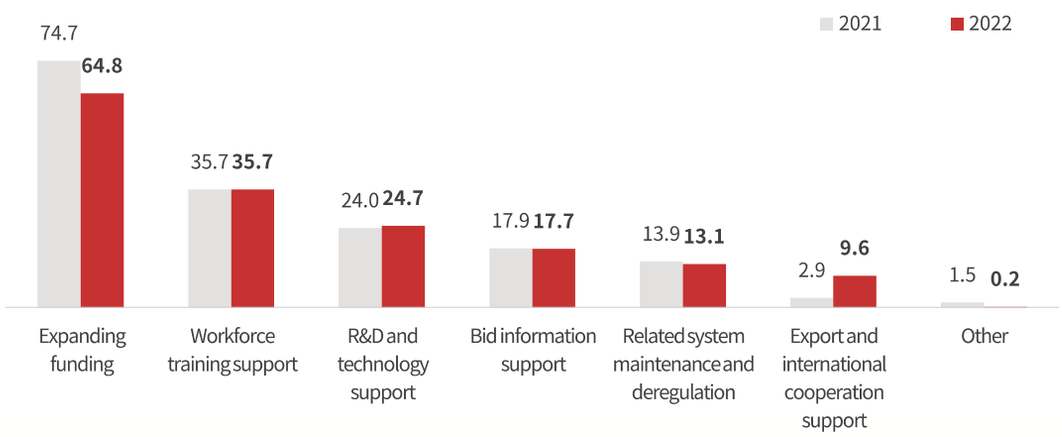
(Duplicate responses, unit: %)



13. Demand for Design-related Government Support

- The highest demand for government support (duplicate responses) was for "Expanding funding" (64.8%), followed by "Workforce training support" (35.7%), "R&D and technology support" (24.7%), etc.
- "Expanding funding" was relatively high in 1 employee (69.1%), and so was "Workforce training support" in 15 employees or more (47.2%).

▾ **Demand for Design-related Government Support** (Duplicate responses, unit: %)



▾ **Demand for Design-related Government Support** (Duplicate responses, unit: %)

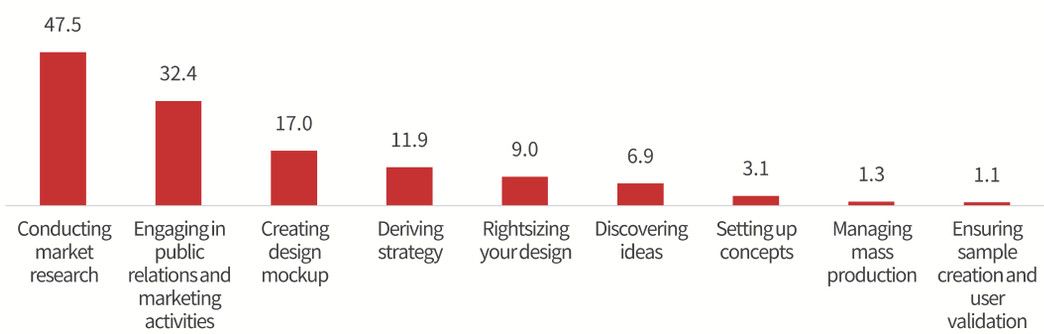
Item		Expanding funding	Workforce training support	R&D and technical support	Bid information support	Related system maintenance and deregulation	Export and international cooperation support	Other
Total		**64.8**	**35.7**	**24.7**	**17.7**	**13.1**	**9.6**	**0.2**
By industry	Product design	70.1	39.3	30.9	22.3	6.7	4.2	0.0
	Visual design	72.8	36.1	24.9	10.1	13.5	4.0	0.3
	Interior design	40.6	34.9	26.1	29.7	13.1	23.7	0.0
	Fashion, textiles, and other design	65.9	28.7	10.1	24.4	21.8	17.9	0.0
By size	1 person	69.1	35.8	24.7	15.0	12.0	8.3	0.0
	2–4 people	53.0	33.5	23.5	27.5	17.7	13.0	0.7
	5–9 people	51.9	39.8	27.9	20.6	12.0	14.6	0.0
	10–14 people	56.6	30.5	28.8	12.4	12.1	10.5	1.2
	15 people or more	58.0	47.2	29.0	16.8	10.1	10.0	0.0

14. Design Trend

- In the era of digital transformation, stage where company utilized new technologies in its design work (new software technologies such as Internet of Things, OpenAI, etc.) was highest in “Conducting market research” (47.5%), followed by “Engaging in public relations and marketing activities” (32.4%), “Creating design mockup” (17.0%), etc.
- The percentage of consideration for eco-friendliness factors when developing designs was 26.3%.
- For challenges when developing designs considering eco-friendliness factors (duplicate responses), “Decreased price competitiveness” (51.7%) was highest.

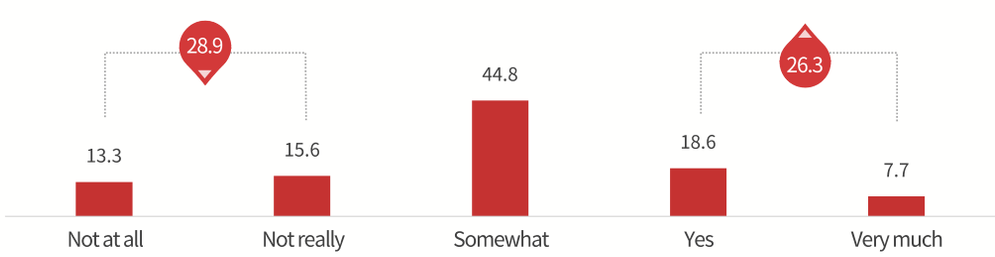
▾ **Stage where company utilized new technologies in its design work**

(Duplicate responses, unit: %)



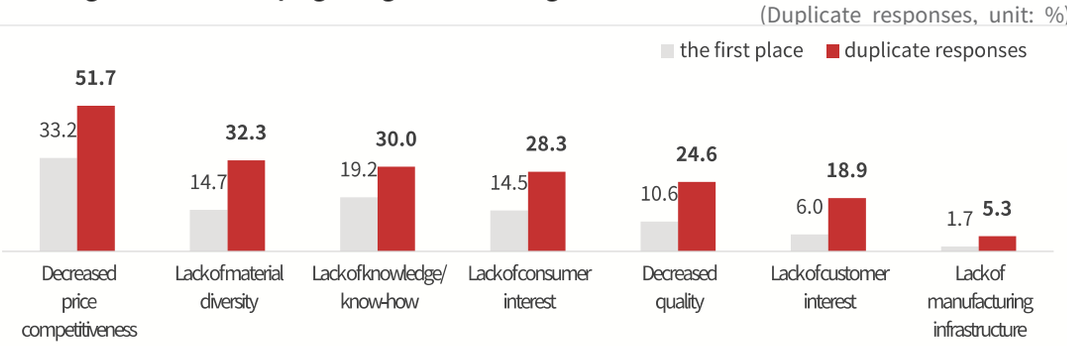
▾ **Consideration for eco-friendliness factors when developing designs**

(Unit : %)



▾ **Challenges when developing designs considering eco-friendliness factors**

(Duplicate responses, unit: %)



※ Design Trend has been added since this year.

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03

Public Sector

1. Status of Having a Dedicated Design Department and Workforce
2. Budget Execution Amount by the Dedicated Design Department
3. Percentage of Design Budgeting Methods and Design Ordering Methods
4. Design Investment Effects
5. Design-Utilization Stage in the Public Policy Process
6. Design Utilization Fields
7. Factors to consider when selecting design-related outsourcing companies/experts

DESIGN
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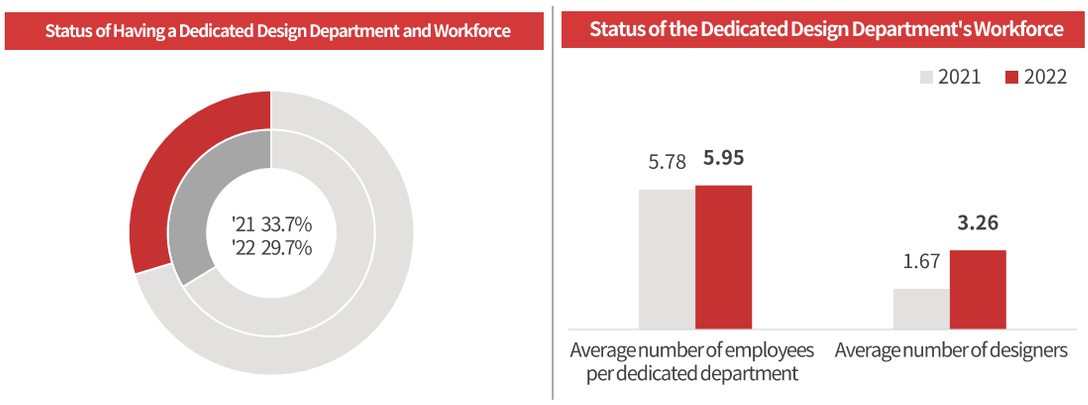
1. Status of Having a Dedicated Design Department and Workforce

- The percentage of the public sector with dedicated design departments decreased to 29.7% in 2022 compared to 2021 (33.7%).
- The average number of employees per dedicated department was 5.95 and the average number of designers was 3.26.

▾ **Status of Having a Dedicated Design Department and Workforce** (Unit : %, person)



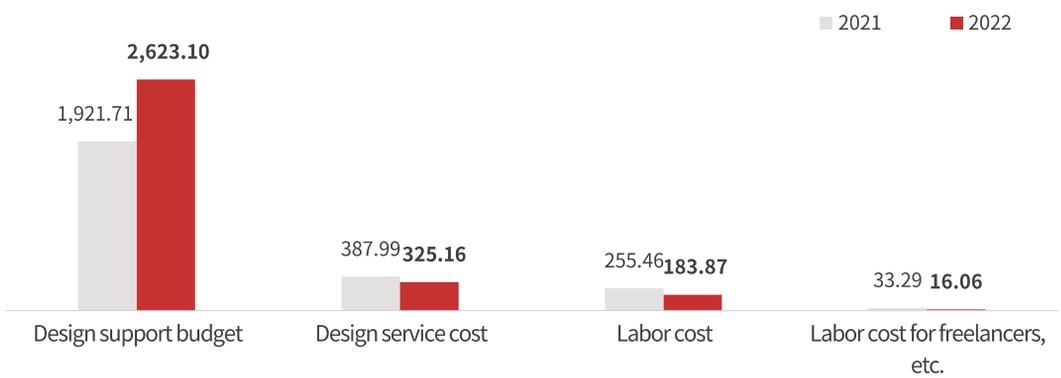
▾ **Status of Having a Dedicated Design Department and Workforce** (Unit : %, person)

Item		2021			2022		
		Design dedicated design departments	Dedicated departments' average number of employees	Average number of designers	Design Dedicated departments' departments	Dedicated departments' average number of employees	Average number of designers
Central administration and local governments		**33.7**	**5.78**	**1.67**	**29.7**	**5.95**	**3.26**
Item	Central administration	16.7	7.75	1.82	31.7	6.00	3.16
	Local governments	35.9	5.62	1.64	16.7	5.33	3.63
	State/Province	64.7	13.92	2.38	68.8	11.55	3.54
	State/County/District	33.6	4.47	1.56	29.0	5.02	3.12

2. Budget Execution Amount by the Dedicated Design Department

- For budget execution amount in 2022, "Design support budget" (2623.10 million won) was highest, followed by "Design service cost" (325.16 million won), “Labor cost” (183.87 million won), “Labor cost for freelancers, etc.” (16.06 million won), etc.
- "Design support budget” increased compared to 2021 (1921.71 million won → 2623.10 million won).

▾ **Budget Execution Amount by the Dedicated Design Department** (Unit : million won)



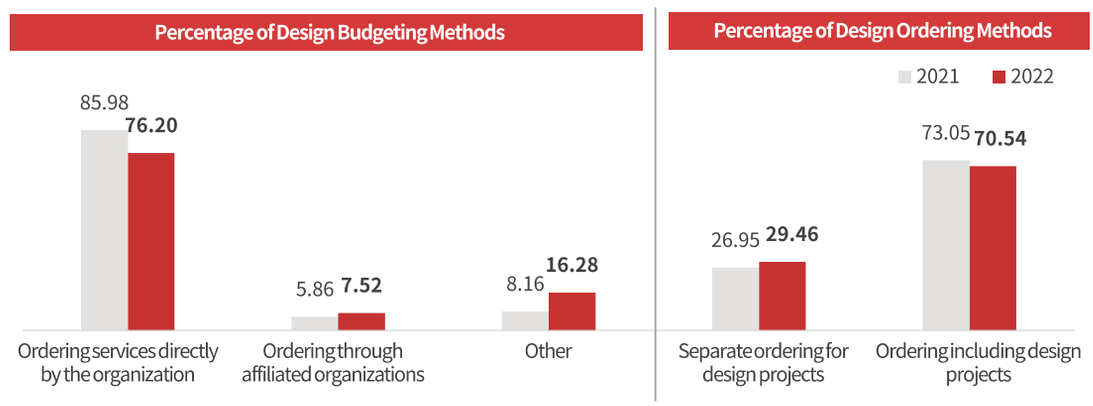
▾ **Budget Execution Amount by the Dedicated Design Department** (Unit : million won)

Item		Design support budget	Design service cost	Labor cost	Labor cost for freelancers, etc.
Central administration and local governments		**2,623.10**	**325.16**	**183.87**	**16.06**
Item	Central administration	1,455.93	348.74	185.68	17.38
	Local governments	16,823.67	38.33	161.83	0.00
	State/Province	4,298.91	283.27	344.45	7.36
	State/County/District	951.53	360.35	157.52	19.16

3. Percentage of Design Budgeting Methods and Design Ordering Methods

- In terms of design budgeting methods, “Ordering services directly by the organization” was 76.20%, which was higher than “Ordering through affiliated organizations” at 7.52%.
- In terms of design ordering methods, “Ordering including design projects” was 70.54% and “Separate ordering for design projects” was 29.46%.

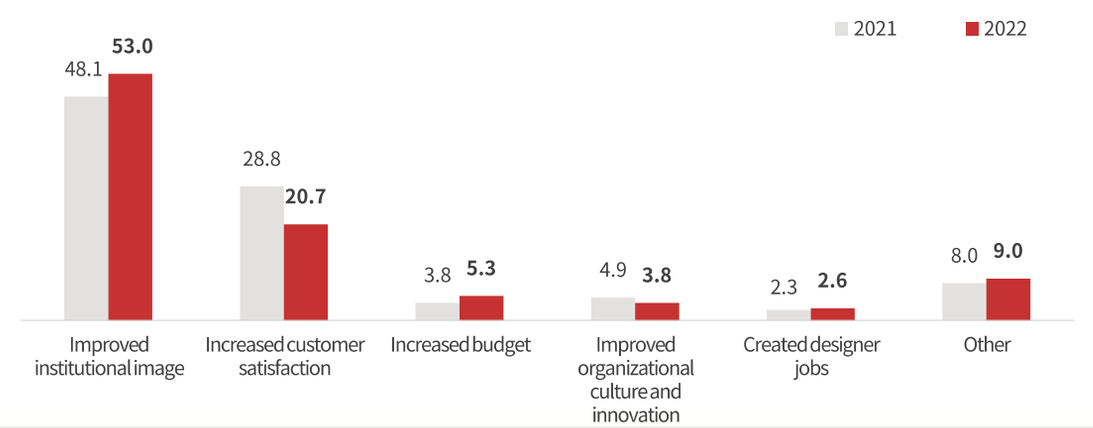
▾ **Percentage of Design Budgeting Methods and Design Ordering Methods** (Unit : %)



4. Design Investment Effects

- For the design investment impact in 2022 (duplicate responses), "Improved institutional image" (53.0%) was highest, followed by "Increased customer satisfaction" (20.7%), etc.
- Compared to 2021, "Improved institutional image" increased (48.1% → 53.0%), but "Increased customer satisfaction" decreased (28.8% → 20.7%).

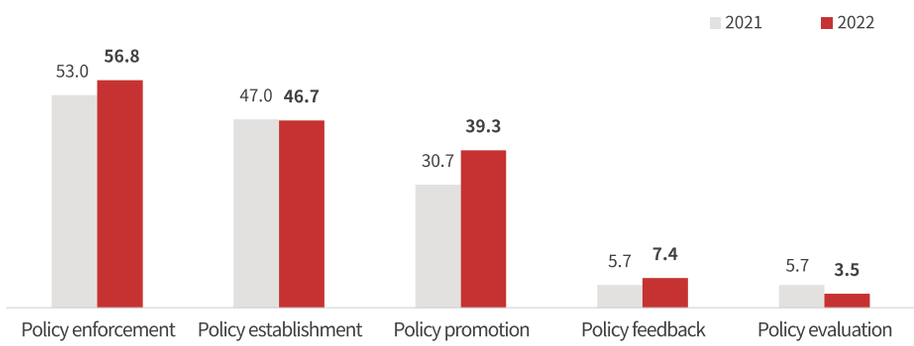
▾ **Design Investment Effects** (Duplicate responses, unit: %)



5. Design-Utilization Stage in the Public Policy Process

- In the public policy process, design-utilization stage was highest in “Policy enforcement” (56.8%), followed by “Policy establishment” (46.7%), “Policy promotion” (39.3%), etc.
- Compared to 2021, "Policy enforcement" (53.0% → 56.8%) and “Policy promotion” (30.7% → 39.3%) increased.

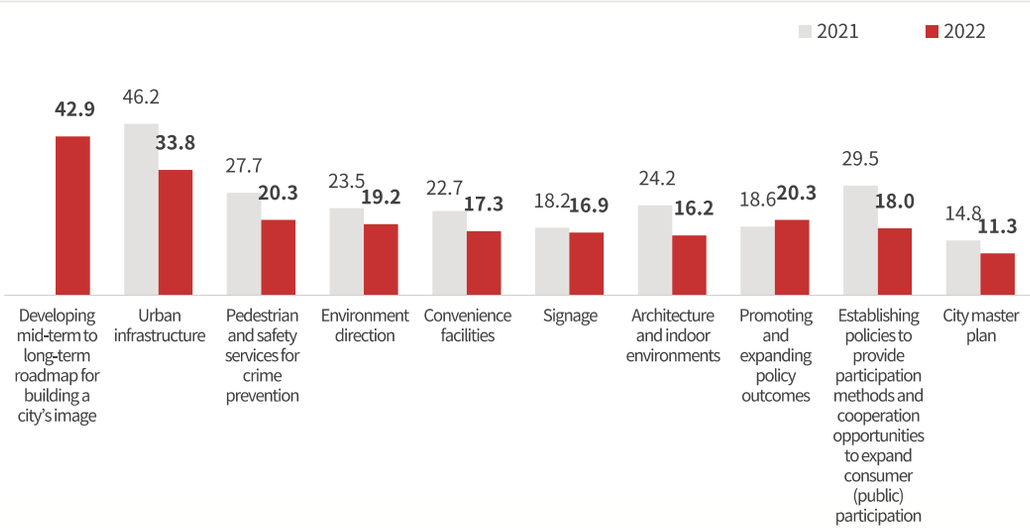
▼ **Design-Utilization Stage in the Public Policy Process** (Duplicate responses, unit: %)



6. Design Utilization Fields

- As for design utilization fields in 2022, "Developing mid-term to long-term roadmap for building a city’s image" (42.9%) was highest, followed by "Urban infrastructure“ (33.8%), "Pedestrian and safety services for crime prevention" (20.3%), etc.

▼ **Design Utilization Fields** (Top 10, duplicate responses, unit: %)



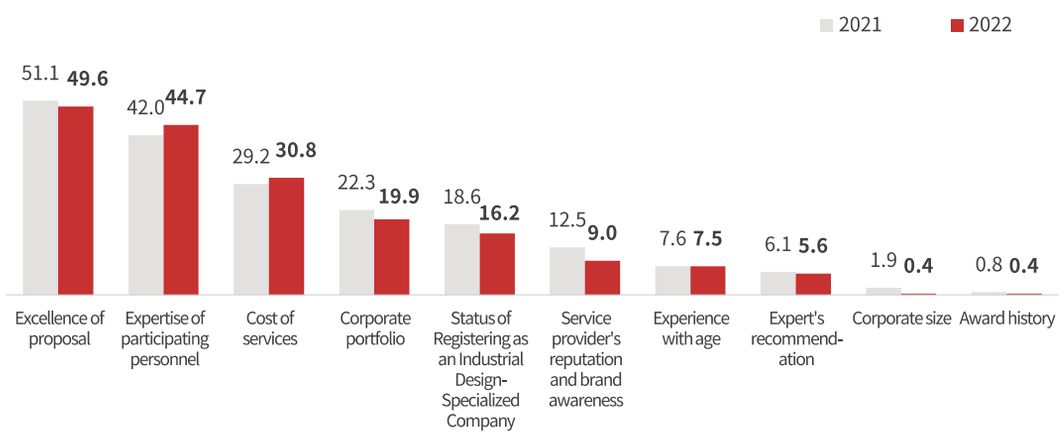
※ “Developing mid-term to long-term roadmap for building a city’s image, such as a design (landscape) master plan, and city master plan”, “Public goods” and “Exhibits” have been added to the item since this year.

7. Factors to consider when selecting design-related outsourcing companies/experts

- For the factors to consider when selecting design-related outsourcing companies/experts (duplicate responses), "Excellence of proposal" (49.6%) was highest, followed by "Expertise of the participating personnel" (44.7%), "Cost of services" (30.8%), etc.

▼ **Factors to consider when selecting design outsourcing companies/experts**

(Duplicate responses, unit: %)



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Part. 4

Status of the Overseas Design Industry

1. Design Industry Size
2. Design Certification
3. Design Competencies
4. Design Education Institutions

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Foreword

1. Overseas design industry statistics are based on design industry statistics published by authorized organizations overseas and are the most recent as of January 2024. Sources and a glossary of terms are provided at the bottom of the table, with a '-' where relevant data is not available.

2. Overseas design industry statistics compares Korea and other major countries on various indicators of the design industry, allowing an understanding of the scale and trends of each indicator. It is difficult to make simple comparisons due to different design classifications and survey criteria by country, but it has significance in grasping the scale of design-related statistics in major countries.

3. In the comparison table for a particular metric, if the currency unit is different for different countries, we apply the average exchange rate to the U.S. dollar by country and year to unify it to the U.S. dollar.

4. Applies to ‘(Professional Design Industry)’. It includes fashion design, industrial design, graphic design, and interior design but excludes webpage design and programming, and architectural design, engineering design, and stage design. (UN ISIC CODE 7410)

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01 Design Industry Size

1. Specialized design industry's annual revenue

(Unit: million dollars)

Ranking (As of 2022)	Country	2018	2019	2020	2021	2022
1	China	167,205.44	177,655.57	226,739.13	303,333.33	289,109.79
2	United States	25,950.00	26,480.00	25,780.00	27,990.00	31,050.00
3	Italy	4,773.88	5,572.58	4,713.52	5,905.07	6,713.78
4	Taiwan	4,660.48	4,464.27	4,877.62	5,636.69	5,877.56
5	**South Korea**	**3,293.30**	**3,398.27**	**3,720.06**	**5,960.16**	**4,896.37**
6	Germany	5,297.18	5,445.84	4,504.55	5,084.88	4,676.14
7	France	2,985.88	3,547.87	2,524.32	3,415.32	3,777.45
8	Netherland	-	-	-	3,614.88	3,574.19
9	Sweden	2,362.47	2,245.17	2,218.52	2,866.45	2,442.66
10	Spain	1,639.76	1,762.47	1,572.39	1,609.18	1,758.91
11	Switzerland	1,353.76	-	1,265.34	1,487.91	1,526.53
12	Denmark	1,226.82	1,245.51	1,176.48	1,488.26	1,453.34
13	Poland	899.18	986.18	983.18	1,266.44	1,369.03
14	Norway	844.59	938.20	857.16	1,170.44	1,197.21
15	Belgium	766.35	911.24	688.64	780.11	817.51
16	Portugal	388.94	410.90	377.73	469.33	530.82
17	Finland	306.24	308.76	317.16	359.91	330.60
18	Austria	283.18	279.66	249.77	297.73	272.43
19	Czech Republic	223.18	200.00	169.32	235.21	270.36
20	Romania	151.65	169.78	177.39	201.80	237.96
21	Hungary	118.35	137.30	131.59	165.94	151.89
22	Croatia	80.71	99.44	95.80	116.82	137.83
23	Estonia	76.12	78.76	83.98	107.40	112.93
24	Slovakia	126.00	78.20	130.68	106.67	110.88
25	Slovenia	82.00	86.52	76.70	99.89	107.33
26	Luxembourg	73.41	73.15	103.98	128.27	98.62
27	Lithuania	55.76	60.45	55.91	96.59	93.91
28	Bulgaria	53.41	57.19	53.41	68.95	87.31
29	Greece	37.88	39.10	42.16	56.09	57.42
30	Latvia	42.35	40.45	43.52	48.36	53.21
31	Malta	23.41	26.18	25.34	34.71	40.59
32	Kypros	23.18	24.83	23.30	28.85	40.27
33	Bosnia and Herzegovina	6.71	7.98	7.84	-	13.52
34	North Macedonia	3.18	6.07	4.89	-	11.80
35	Japan	2,986.44	3,409.61	3,600.27	4,434.57	-
36	Ireland	551.29	633.93	601.82	776.56	-
37	Serbia	10.12	10.79	15.23	40.42	-

Source 1) Europe : Annual detailed enterprise statistics for services (Eurostat, 2023.12)
2018-2020 is based on gross turnover, and 2021-2022 is based on net turnover (turnover deducted of sales discounts and returns).
2) United States : Premium Report on Specialized Design Services 2022 (Anything Research)
3) Korea : Design Industrial Statistics 253
4) Japan : Specific Service Industry Survey 2017, 2018 (Ministry of Economy, Trade and Industry, Japan), Economic Structure Survey 2019, 2020 (Statistics Bureau of the Ministry of Internal Affairs and Communications, Japan), Economic Census Activity Survey 2021 (Statistics Bureau of the Ministry of Internal Affairs and Communications, Japan)
5) China : Culture and Related Industries Key Indicators 2019, 2020, 2021 2022, 2023 (National Bureau of Statistics of China)
6) Taiwan : Design in Taiwan Report 2022 (data from 2018-2021), Taiwan's Cultural and Creative Industries Development Yearbook First Report 2022 (2022 data)

Note Unified sales units to US dollars by applying an average exchange rate to US dollars by country (per currency unit) per year

2. Number of Specialized Design Industry Companies

(Unit: Count)

Ranking (As of 2022)	Country	2018	2019	2020	2021	2022
1	France	28,465	33,310	36,088	42,816	57,465
2	Netherland	31,267	35,510	39,404	42,566	46,316
3	Italy	33,684	33,931	36,131	41,706	44,210
4	United States	33,884	34,588	35,570	37,153	40,204
5	Germany	29,580	28,929	24,644	24,707	25,634
6	United Kingdom	23,581	-	23,695	23,900	24,005
7	**South Korea**	**5,570**	**6,264**	**7,229**	**19,465**	**20,290**
8	Poland	13,502	14,997	15,978	17,973	18,850
9	Taiwan	9,336	9,587	10,664	11,449	12,088
10	Sweden	13,126	13,262	13,236	13,432	11,441
11	Portugal	6,226	6,767	7,194	8,127	9,309
12	Japan	7,289	7,851	7,572	8,996	7,287
13	Hungary	3,653	4,518	5,084	6,034	6,448
14	Norway	4,952	5,394	5,458	6,097	6,342
15	Belgium	4,936	5,410	5,528	6,093	6,224
16	Romania	2,123	2,392	2,656	4,909	5,603
17	Spain	6,455	6,949	9,983	4,278	4,451
18	Finland	2,048	2,085	2,194	4,217	4,355
19	Czech Republic	2,952	3,222	3,473	3,758	4,137
20	Denmark	3,877	4,010	3,935	4,060	4,024
21	Croatia	1,074	2,137	2,340	2,708	2,921
22	Lithuania	1,398	1,723	2,022	2,404	2,785
23	Austria	1,654	1,802	1,764	2,689	2,534
24	Slovenia	1,648	1,810	1,894	2,034	2,176
25	Estonia	964	1,008	1,015	1,587	1,751
26	Slovakia	937	953	1,051	1,339	1,547
27	Bulgaria	1,000	1,112	1,174	1,251	1,363
28	Switzerland	1,166	1,183	1,211	1,220	1,211
29	Greece	761	831	885	1,052	1,198
30	Latvia	639	670	709	708	802
31	Kypros	409	443	450	484	535
32	Serbia	105	111	140	448	457
33	Malta	180	186	211	386	434
34	Luxembourg	268	302	309	340	333
35	Bosnia and Herzegovina	112	123	151	-	217
36	North Macedonia	108	129	-	163	179
37	Ireland	2,831	2,955	3,038	3,240	-
38	Iceland	452	463	494	510	-
39	China	620,232	632,943	-	-	-

Source 1) Europe : Annual detailed enterprise statistics for services (Eurostat, 2023.12.), Enterprises
- United Kingdom : DCMS Sectors Economic Estimates: Business Demographics Report (data from 2020 to 2022)

2) United States : Premium Report on Specialized Design Services 2022 (Anything Research)

3) South Korea : Design Industrial Statistics 2019, 2020, 2021, 2022, 2023

4) Japan : Survey of Specified Service Industries 2018 (Ministry of Economy, Trade and Industry, Japan), Survey of Economic Structure 2019 and 2020 (Statistics Bureau, Ministry of Internal Affairs and Communications, Japan), Survey of Economic Census Activities 2021 (Statistics Bureau, Ministry of Internal Affairs and Communications, Japan), Survey of Economic Structure (Cross-sectional Industry Survey) 2022 Table 1 (Statistics Bureau, Ministry of Internal Affairs and Communications, Japan)

5) China : China Cultural and Industrial Statistics Yearbook 2019, 2020 (National Bureau of Statistics of China)

6) Taiwan : Design in Taiwan Report 2022 (data from 2018 to 2021), Taiwan Cultural and Creative Industries Development Yearbook's First Report 2022 (data from 2022)

3. Number of Workers in the Specialized Design Industry

(Unit: Count)

Ranking (As of 2022)	Country	2018	2019	2020	2021	2022
1	United Kingdom	62,842	-	-	-	139,000
2	United States	128,250	128,587	118,561	121,436	130,357
3	Italy	51,961	53,034	54,284	60,958	66,171
4	France	30,772	34,526	36,982	35,689	53,882
5	Germany	57,586	57,353	47,057	50,718	53,183
6	**South Korea**	**22,698**	**25,284**	**28,775**	**43,889**	**44,882**
7	Netherland	24,630	26,293	28,216	30,534	32,046
8	Poland	20,097	22,243	22,968	25,661	27,884
9	Portugal	9,325	10,145	10,655	11,629	13,072
10	Spain	12,706	13,734	15,982	14,677	12,718
11	Sweden	11,672	12,108	11,378	13,362	10,131
12	Switzerland	8,202	8,807	8,118	8,938	8,207
13	Belgium	7,041	7,869	7,503	7,617	7,838
14	Romania	4,028	4,469	4,572	6,734	7,345
15	Hungary	4,097	5,238	5,682	6,758	7,289
16	Denmark	7,316	7,454	7,311	7,286	7,235
17	Norway	5,602	6,046	6,016	6,669	7,080
18	Croatia	1,911	3,095	3,242	3,664	3,938
19	Austria	2,979	3,168	3,074	4,054	3,910
20	Czech Republic	2,992	3,163	3,258	3,643	3,804
21	Finland	2,801	2,971	3,067	3,221	3,127
22	Lithuania	1,736	2,028	2,265	2,690	3,024
23	Slovenia	1,931	2,111	2,195	2,394	2,566
24	Bulgaria	1,812	1,974	2,030	2,185	2,316
25	Estonia	1,441	1,373	1,483	2,114	2,296
26	Slovakia	968	1,170	1,690	1,722	1,974
27	Greece	1,054	1,178	1,249	1,500	1,760
28	Serbia	368	365	608	1,394	1,517
29	Latvia	1,392	1,283	1,302	1,173	1,159
30	Kypros	553	596	604	647	732
31	Luxembourg	376	421	470	515	555
32	Malta	317	355	363	559	536
33	North Macedonia	182	231	234	308	394
34	Bosnia and Herzegovina	157	190	208	-	309
35	China	4,078,120	4,023,601	4,009,074	4,194,009	-
36	Hong Kong	17,590	18,590	18,580	18,810	-
37	Japan	31,036	35,132	34,503	38,260	-
38	Ireland	4,625	4,886	4,803	5,108	-
39	Iceland	496	503	522	555	-

Source 1) Europe : Annual detailed enterprise statistics for services (Eurostat, 2023.12.), Persons employed
- United Kingdom : Economic Estimates: Employment and Earnings in DCMS and Digital sector(2022)
2) United States : Premium Report on Specialized Design Services 2022 (Anything Research)
3) South Korea : Design Industrial Statistics 2019, 2020, 2021, 2022, 2023
4) Japan : Specific Service Industry Survey 2017, 2018 (Ministry of Economy, Trade and Industry, Japan), Economic Structure Survey 2019, 2020 (Statistics Bureau of the Ministry of Internal Affairs and Communications, Japan), Economic Census Activity Survey 2021 (Statistics Bureau of the Ministry of Internal Affairs and Communications, Japan)
5) China : China Cultural and Industrial Statistics Yearbook 2019, 2020, 2021, 2022 (National Bureau of Statistics of China)
6) Hong Kong : Feature Articles of HKMDS 2023 (Census and Statistics Department, Hong Kong Special Administrative Region)

4. Specialized Design Industry's Value Added (Europe)

(Unit : thousand Euros)

Ranking (As of 2021)	Country	2017	2018	2019	2020	2021
1	Netherland	-	-	-	-	206.95
2	Belgium	112.8	125.3	134.5	114.5	147.20
3	Spain	156.2	133.8	133.7	115.1	128.56
4	Italy	106.1	110.2	113.6	98.8	121.22
5	Sweden	100.6	107.5	107.8	120.6	118.91
6	France	92.7	101.4	108.8	87.9	116.83
7	Ireland	95.1	94.2	97.4	89.3	110.85
8	Denmark	87.8	92.0	91.1	89.1	110.57
9	Finland	71	74.1	74.3	71.8	109.48
10	Germany	85.9	95.3	98.2	103.2	104.25
11	Slovenia	71.2	75.2	82.4	81.6	88.53
12	Luxembourg	73.3	77.7	78.4	113.3	88.38
13	Austria	-	92.0	91.9	90.4	86.26
14	Norway	80.8	79.1	82.7	77.2	86.26
15	Malta	-	50.6	64.9	63.9	71.03
16	Czech Republic	46.6	48.4	53.3		54.84
17	Hungary	22.1	28.6		50.7	52.14
18	Greece	28.7	23.8	27.8	35.6	36.70
19	Slovakia	12.4	22.5	31.1	5.7	35.20
20	Lithuania	18.2	23.4	24.2	26.5	33.75
21	Portugal	30.3	30.6	30.5	27.4	32.59
22	Estonia	23.8	25.0	33.2	21.5	26.59
23	Croatia	17.7	17.9	21.3	24.2	25.85
24	Bulgaria	21.1	19.9	22.0	20.8	24.31
25	Poland	29.9	35.5	40.8	34.4	22.32
26	Kypros	24.2		21.5	20.2	20.87
27	Romania	15.1	13.8	15.2	17.7	18.51
28	Latvia	11.5	13.8	13.4	14.6	17.79
29	Serbia	8.2	-	-	-	13.85
30	United Kingdom	70.9	70.5	-	-	-
31	Iceland	45.9	46.8	44.9	45.1	-
32	Bosnia and Herzegovina	34.2	33.8	36.5	38.7	-
33	Serbia	-	9.2	9.6	11.3	-

Source Annual detailed enterprise statistics for services (Eurostat, 2023. 12), Gross value added per employee

Note 1) Gross Value Added is the output value of the buyer's price minus intermediate consumption at the base price

2) Lack of economic value statistics for the Korean specialized design industry based on the same standards as in Europe

02 Design certification

1. Number of industrial design applications compared to population by G20

Ranking (As of 2022)	Country	Number of applications by patent office	Population (in thousands)	Number of design applications per population (in thousands)
1	**South Korea**	**56,907**	**51,628**	**1.10**
2	China	796,211	1,412,175	0.56
3	Australia	7,860	26,005	0.30
4	Switzerland	2,614	8,775	0.30
5	United Kingdom	17,666	66,971	0.26
6	Japan	30,438	125,124	0.24
7	Turkey	20,496	84,979	0.24
8	Canada	6,845	38,929	0.18
9	United States	52,325	333,287	0.16
10	Iran	8,212	88,550	0.09
11	France	5,572	67,971	0.08
12	Thailand	5,259	71,697	0.07
13	Russia	6,868	114,236	0.06
14	Germany	4,017	83,797	0.05
15	Brazil	7,196	215,313	0.03
16	Morocco	1,160	37,457	0.03
17	Spain	1,264	47,778	0.03
18	Italy	1,104	58,940	0.02
19	India	22,557	1,417,173	0.02

Source 1) Population (estimate) : Worldbank(https://data.worldbank.org/indicator/SP.POP.TOTL?name_desc =false)

2) Number of applications : WIPO statistics database (<4)https://www3.wipo.int/ipstats/index.htm?tab= industrial}Total design applications (direct and via the hague system_Total count by filing office), 2023.11

2. Number of WIPO industrial design applications (per patent office)

(Unit : case)

Ranking (As of 2022)	Country	Number of industrial design applications by year				
		2018	2019	2020	2021	2022
1	China	708,799	711,617	770,362	805,710	796,211
2	**South Korea**	**63,797**	**65,311**	**67,381**	**64,926**	**56,907**
3	United States	44,385	46,827	48,030	56,395	52,325
4	Japan	30,249	30,950	30,475	30,847	30,438
5	India	12,632	13,723	12,793	21,446	22,557
6	Turkey	9,290	10,351	11,320	15,610	20,496
7	United Kingdom	4,683	6,075	7,882	19,761	17,666
8	Oceania	9,670	10,186	8,791	9,555	9,641
9	Africa	10,867	10,150	9,168	6,936	8,700
10	Iran	14,774	17,622	14,984	14,016	8,212
11	Australia	8,029	8,857	7,359	8,120	7,860
12	Brazil	6,111	6,432	6,263	6,711	7,196
13	Russia	6,565	7,143	7,568	8,052	6,868
14	Canada	6,737	6,390	6,187	7,051	6,845
15	France	5,809	5,770	6,002	6,038	5,572
16	Thailand	5,469	5,293	5,818	5,687	5,259
17	Indonesia	3,799	2,668	3,520	4,368	4,862
18	Germany	6,439	6,155	6,331	5,899	4,017
19	Mexico	3,949	3,726	3,498	4,093	3,667
20	Vietnam	2,873	3,492	3,499	3,783	3,396
21	Switzerland	2,676	2,773	2,453	2,780	2,614
22	Singapore	2,043	2,365	2,063	2,555	2,317
23	Egypt	2,009	1,999	2,049	2,537	2,244
24	Argentina	1,607	2,049	2,099	2,372	2,230
25	New Zealand	1,581	1,281	1,367	1,431	1,736
26	Hong Kong	2,583	2,576	2,015	1,882	1,672
27	Malaysia	1,845	1,904	1,701	1,739	1,656
28	Saudi Arabia	917	804	948	1,400	1,508
29	Philippines	1,589	1,735	1,293	1,372	1,341
30	Ukraine	3,604	3,289	2,504	2,425	1,303
31	Bangladesh	2,014	1,598	1,241	1,424	1,296
32	Spain	1,799	1,672	1,565	1,392	1,264
33	Israel	1,688	1,483	1,345	1,299	1,236
34	Norway	1,241	1,336	1,139	1,374	1,210
35	Morocco	1,280	1,299	976	1,099	1,160
36	Italy	1,192	1,199	1,304	1,215	1,104
37	Colombia	638	668	792	952	925
38	United Arab Emirates	692	923	686	972	902
39	Poland	1,151	1,068	1,060	1,224	874
40	Ghana	831	-	1,013	-	768
41	Tunisia	485	552	-	-	744
42	Chile	602	528	459	388	506
43	Pakistan	588	581	464	572	478
44	Peru	381	382	276	389	391
45	Algeria	414	452	502	354	385
46	Austria	483	583	373	400	370
47	Madagascar	300	318	220	328	360
48	Mongolia	275	332	292	372	329
49	Serbia	343	380	359	325	311
50	Kuwait	399	-	232	392	308

Source WIPO statistics database (https://www3.wipo.int/ipstats/index.htm?tab=industrial)
Total design applications (direct and via the hague system_Total count by filing office), 2023.11

Note The number of industrial design registrations by origin was aggregated based on applications submitted to the patent office of an individual country.

3. Number of WIPO industrial design applications (by origin)

(Unit : case)

Ranking (As of 2022)	Country	Number of industrial design applications by year				
		2018	2019	2020	2021	2022
1	China	825,834	900,748	1,039,685	1,177,402	1,115,214
2	United States	132,432	133,456	128,736	127,256	123,914
3	Germany	125,132	124,772	117,808	110,035	99,460
4	**South Korea**	**90,967**	**104,852**	**109,260**	**96,713**	**84,333**
5	Italy	68,214	70,592	79,250	69,667	72,212
6	France	70,504	69,758	60,501	64,734	61,925
7	Japan	68,110	66,824	60,683	58,136	55,426
8	Poland	40,967	41,280	45,439	43,573	40,370
9	United Kingdom	55,709	54,936	57,635	35,915	36,547
10	Switzerland	31,580	31,360	28,320	28,824	30,395
11	Spain	32,959	30,845	28,003	28,613	27,590
12	Netherland	25,794	28,842	26,611	25,151	24,493
13	Turkey	13,008	12,968	14,770	19,183	23,721
14	India	10,547	10,912	10,479	19,314	20,690
15	Sweden	19,672	19,454	18,414	17,208	17,543
16	Denmark	14,791	14,940	16,809	16,369	13,588
17	Belgium	13,896	13,545	13,331	12,374	12,419
18	Austria	14,350	14,109	13,034	13,520	12,359
19	Australia	11,417	10,704	9,333	10,087	9,242
20	Czech Republic	8,835	8,440	9,162	8,630	8,652
21	Hong Kong	12,036	12,594	12,991	12,924	8,368
22	Iran	14,617	17,494	14,940	13,937	8,170
23	Finland	9,332	9,330	10,263	8,989	7,876
24	Russia	4,905	6,022	6,971	8,171	7,190
25	Canada	8,325	7,523	7,055	7,470	6,879
26	Portugal	7,607	6,022	6,900	6,831	6,718
27	Brazil	5,138	5,456	4,847	5,594	5,842
28	Romania	3,663	4,624	4,388	5,382	5,464
29	Israel	5,970	5,235	5,213	5,584	4,717
30	Thailand	4,449	4,089	4,747	4,641	4,036
31	Indonesia	2,607	1,993	2,365	3,069	3,680
32	Bulgaria	3,688	3,685	3,401	3,545	3,291
33	Ireland	2,970	3,386	4,048	4,441	3,061
34	Norway	3,681	3,720	4,040	4,116	3,060
35	Singapore	2,538	2,360	2,420	4,472	3,054
36	New Zealand	2,921	2,261	2,565	2,614	2,790
37	Croatia	1,367	1,530	1,708	1,974	2,737
38	Hungary	2,788	2,911	2,747	1,837	2,633
39	Slovenia	2,910	-	3,010	2,502	2,462
40	Vietnam	2,009	1,961	2,143	2,334	2,414
41	Estonia	2,275	2,057	2,601	2,658	2,350
42	Luxembourg	3,401	3,730	2,758	2,155	2,163
43	Lithuania	1,110	1,104	1,974	2,713	1,959
44	Egypt	1,784	1,720	1,782	2,253	1,929
45	Greece	2,630	2,053	2,260	2,323	1,900
46	Slovakia	1,972	1,988	2,284	2,403	1,740
47	Côte d'Ivoire	1,564	1,116	1,649	1,360	1,643
48	Ukraine	4,088	3,691	2,952	3,105	1,611
49	Argentina	1,114	1,345	1,492	1,615	1,556
50	Mexico	2,136	1,852	1,509	1,674	1,392

Source WIPO statistics database (https://www3.wipo.int/ipstats/index.htm?tab=industrial)
Total design applications (direct and via the hague system_Total count by applicant's origin), 2023.11

Note The number of industrial design applications by origin was aggregated by the nationality of the applicant.

4. Number of WIPO industrial design registrations (by patent office)

(Unit : case)

Ranking (As of 2022)	Country	Number of industrial design applications by year				
		2018	2019	2020	2021	2022
1	China	536,251	556,529	731,918	785,521	722,004
2	**South Korea**	**49,153**	**51,919**	**50,289**	**56,038**	**53,675**
3	United States	30,850	35,047	37,721	33,644	35,414
4	Japan	26,815	27,260	26,399	26,527	28,544
5	India	8,198	13,710	8,721	13,013	19,939
6	United Kingdom	24,305	25,298	23,886	16,915	18,778
7	Turkey	9,601	8,928	10,002	13,169	14,959
8	Oceania	8,971	8,479	7,816	9,189	9,074
9	Australia	7,594	7,085	6,405	7,945	7,589
10	Canada	5,132	6,340	4,849	4,899	7,526
11	Russia	6,741	6,330	6,139	7,001	6,579
12	Africa	7,734	8,503	7,223	4,814	6,246
13	Brazil	8,725	5,850	5,391	5,468	6,052
14	France	5,526	5,091	4,870	3,974	5,781
15	Germany	6,353	5,756	5,338	4,929	4,374
16	Mexico	2,797	2,865	2,426	3,768	3,357
17	Switzerland	2,388	2,456	2,652	2,636	2,585
18	Thailand	3,627	3,130	3,491	2,701	2,314
19	Vietnam	2,360	2,172	2,293	2,484	2,245
20	Singapore	1,850	2,259	2,230	2,441	2,049
21	Argentina	1,314	1,959	1,865	2,284	1,975
22	Indonesia	3,300	4,109	1,031	2,263	1,946
23	Malaysia	1,475	1,238	1,266	965	1,844
24	Hong Kong	2,645	2,372	2,731	2,108	1,675
25	South Africa	1,520	1,884	1,495	1,668	1,594
26	New Zealand	1,326	1,332	1,353	1,240	1,448
27	Norway	1,116	1,193	1,207	1,256	1,232
28	Nigeria	2,002	2,740	1,138	-	1,213
29	Bangladesh	882	574	688	829	1,197
30	Spain	1,700	1,648	1,519	1,378	1,173
31	Ukraine	2,787	3,162	2,609	2,273	1,133
32	Morocco	1,157	1,220	1,034	1,067	1,126
33	Saudi Arabia	786	564	778	996	1,112
34	Italy	1,364	1,341	1,264	1,097	1,035
35	Israel	1,019	1,021	1,383	1,197	960
36	United Arab Emirates	2,428	685	1,210	721	942
37	Philippines	1,985	1,488	674	829	870
38	Egypt	1,183	973	700	632	854
39	Iran	5,520	6,023	4,454	2,640	802
40	Poland	998	984	849	1,049	792
41	Colombia	562	510	642	599	479
42	Peru	453	293	228	347	366
43	Austria	589	516	468	311	315
44	Kuwait	349	-	-	-	308
45	Madagascar	173	356	220	246	295
46	Belarus	180	299	222	241	291
47	Mongolia	264	272	234	209	288
48	Chili	340	368	495	371	275
49	Serbia	303	340	368	304	272
50	Macau	207	162	285	177	262

Source WIPO statistics database (https://www3.wipo.int/ipstats/index.htm?tab=industrial)
Total design registrations (direct and via the Hague system_Total count by filing office), 2023.11

Note The number of industrial design registrations by origin was aggregated based on applications submitted to the patent office of an individual country.

5. Number of WIPO industrial design registrations (by origin)

(Unit : case)

Ranking (As of 2022)	Country	Number of industrial design registrations by year				
		2018	2019	2020	2021	2022
1	China	646,531	731,119	985,276	1,141,425	957,293
2	United States	122,835	123,695	129,815	116,405	111,921
3	Germany	123,670	119,587	117,843	109,280	85,963
4	**South Korea**	**76,245**	**81,308**	**97,993**	**87,158**	**77,845**
5	Italy	67,349	67,949	79,994	68,442	62,547
6	France	67,954	63,718	62,842	61,286	55,191
7	Japan	66,170	62,766	60,485	54,249	52,591
8	United Kingdom	72,340	68,820	70,104	35,727	32,453
9	Poland	38,487	37,858	41,817	42,540	32,358
10	Switzerland	30,507	29,647	30,467	28,642	29,643
11	Spain	31,847	29,816	27,974	28,396	22,203
12	Netherland	26,297	27,135	26,545	24,131	20,213
13	Turkey	12,184	11,051	13,741	15,500	18,105
14	India	6,991	11,016	7,335	11,541	16,573
15	Sweden	19,555	18,314	19,489	16,554	14,539
16	Denmark	13,709	13,651	16,502	16,475	12,202
17	Belgium	13,649	12,710	13,148	12,148	10,812
18	Austria	14,390	13,488	13,510	12,950	10,578
19	Czech Republic	8,452	8,072	9,011	8,307	7,780
20	Australia	10,611	9,753	8,901	9,534	7,537
21	Hong Kong	11,825	11,196	13,592	13,031	6,507
22	Finland	9,678	8,734	10,322	8,850	6,478
23	Russia	4,171	4,634	5,247	5,536	6,337
24	Canada	7,244	6,933	6,722	6,342	6,134
25	Israel	5,256	4,735	5,105	5,118	4,409
26	Brazil	5,924	4,635	4,196	4,310	4,364
27	Romania	3,569	4,243	4,137	5,336	3,932
28	Portugal	7,211	5,544	6,553	7,066	3,852
29	Norway	2,770	3,985	4,228	3,985	2,909
30	Singapore	2,454	2,358	2,256	3,968	2,863
31	Ireland	2,943	3,084	4,172	4,373	2,848
32	New Zealand	2,448	2,278	2,589	2,019	2,529
33	Luxembourg	3,465	3,190	3,123	2,341	2,207
34	Croatia	1,423	1,131	1,789	1,936	2,058
35	Bulgaria	3,846	3,473	3,369	3,567	1,947
36	Estonia	2,184	1,960	2,621	2,652	1,876
37	Slovenia	2,482	-	2,970	2,505	1,780
38	Hungary	2,456	2,869	2,662	1,703	1,746
39	Thailand	2,648	2,371	2,753	1,881	1,575
40	Greece	2,822	1,923	2,024	2,409	1,419
41	Lithuania	1,007	832	1,926	2,622	1,384
42	Slovakia	2,002	1,932	2,019	2,576	1,347
43	South Africa	1,657	2,023	1,751	1,442	1,338
44	Vietnam	1,538	1,389	1,224	1,446	1,324
45	Argentina	859	1,220	1,344	1,350	1,323
46	Ukraine	2,996	3,316	3,121	2,679	1,271
47	Indonesia	2,097	2,444	711	1,443	1,262
48	Latvia	807	1,024	1,818	1,544	1,243
49	Bangladesh	777	497	632	807	1,168
50	Mexico	1,317	1,200	979	975	953

Source WIPO statistics database (https://www3.wipo.int/ipstats/index.htm?tab=industrial) Total design registrations (direct and via the Hague system_Total count by applicant's origin), 2023.11

Note The number of industrial design registrations by origin was aggregated based on applications submitted to the patent office of an individual country.

03 Design competencies

1. National Innovation Design Contributions

Ranking (As of 2023)	Country	2019	2020	2021	2022	2023
1	China	202.6	210.8	450.6	461.6	467.3
2	**South Korea**	**226.8**	**228.8**	**467.6**	**439.6**	**449.7**
3	Austria	143.8	130.5	129.5	190.6	178.9
4	Denmark	159.7	153.9	160.3	190.6	157.7
5	Italy	124.9	118.3	109.1	140.5	152.7
6	Poland	114.0	105.4	106.6	141	150.5
7	Bulgaria	111.3	107.0	90.8	83.9	149.2
8	Malta	219.8	128.7	73.7	138.9	139
9	Switzerland	131.3	136.3	133.8	150.8	122
10	Estonia	141.1	94.6	92.8	129.3	118
11	Germany	139.9	113.9	106.7	129.3	117.1
12	Netherland	90.5	88.1	95.3	109	107.5
13	Luxembourg	157.6	158.9	120.5	107.4	104.7
14	Finland	89.9	78.7	94.8	126.3	104.2
15	Sweden	92.6	84.2	84.9	94.8	91.6
16	Japan	96.3	96.2	89.6	86.3	88.8
17	Kypros	56.0	61.1	49.7	95	87.5
18	Portugal	84.4	74.0	57.4	78.8	81.5
19	Australia	98.4	99.5	98.0	78.2	79.5
20	Slovenia	59.5	46.7	62.1	54.6	74.1
21	Spain	59.7	54.3	49.5	63.8	72.2
22	Belgium	61.1	56.7	52.5	66.8	67.6
23	France	64.1	55.4	48.1	63.5	67.6
24	Czech Republic	92.2	47.8	47.8	67.3	67.3
25	Canada	76.4	78.0	59.0	61.9	61.8
26	Lithuania	35.9	27.8	29.5	53.7	56.3
27	Latvia	39.3	37.0	39.9	58.5	49.8
28	Slovakia	59.5	46.7	62.1	45.1	37.2
29	United States	59.9	60.5	34.6	35.2	35.7
30	Croatia	19.1	10.7	13.3	24.4	34.8
31	United Kingdom	64.8	53.5	51.7	53	34.1
32	Ireland	31.3	29.8	34.2	44.8	33
33	South Africa	65.0	62.6	36.8	31.4	31.6
34	Brazil	53.0	53.7	10.4	28.9	29.2
35	Greece	23.0	15.7	15.7	27.4	25.8
36	Mexico	-	-	-	23.8	24.5
37	Romania	29.1	21.1	17.9	20.1	24.2
38	Iceland	29.9	29.2	3.5	0.9	22.3
39	India	42.0	43.8	7.5	20.7	20.9
40	Hungary	26.1	22.1	19.1	19.5	19.1
41	Chile	-	-	-	13.9	14.1
42	Albania	-	-	-	0	12.7
43	Norway	12.8	13.6	14.5	16.9	12.1
44	Turkey	2.5	2.2	2.1	2.5	1.9
45	Serbia	2.2	5.7	4.7	0.7	1.5
46	Bosnia and Herzegovina	-	-	-	0.4	1.1
47	North Macedonia	1.4	1.3	0.4	0.5	1

Source European Commission, Innovation Scoreboard 2019, 2020, 2021, 2022, 2023

Note 1) The European Commission (EC)'s “Innovation Scoreboard” quantifies and compares the research and innovation performance, studies, etc. of 47 countries annually.
2) The national innovation design contributions are drawn up based on the value of the item “Design applications (per billion GDP),” which is included as an item in the Intellectual assets index.

2. Number of International Design Award Winners by G20

1) Number of iF Design Award Winners

(Unit: Count)

Ranking (As of 2023)	Country	2019	2020	2021	2022	2023
1	China	607	657	924	1,283	1,356
2	**South Korea**	**287**	**252**	**310**	**406**	**479**
3	Germany	485	378	387	388	392
4	Japan	193	195	208	225	276
5	United States	168	167	168	250	186
6	Brazil	28	17	30	23	68
7	Italy	47	56	69	81	56
8	Turkey	17	22	13	40	45
9	United Kingdom	34	37	35	74	17
10	France	11	8	24	21	15
11	Australia	8	10	17	14	12
12	India	6	4	6	13	8
13	Canada	2	4	6	6	7
14	Russia	4	5	5	9	3
15	Mexico	-	-	3	2	1
16	Indonesia	-	-	-	1	0
17	Argentina	1	-	-	-	0
18	South Africa	-	-	1	-	0
19	Saudi Arabia	-	1	-	-	-
Total number of winners		2,078	2,553	2,836	3,566	2,921

Source iF World Design Guide (https://ifworlddesignguide.com/winners?filter), 2024.01
Note Aggregated by the number of iF Design Awards after filtering by year for each G20 country

2) Number of Red Dot Design Award winners

(Unit: Count)

Ranking (As of 2023)	Country	2019	2020	2021	2022	2023
1	China	342	381	527	538	411
2	Germany	338	296	352	333	337
3	**South Korea**	**112**	**143**	**164**	**214**	**182**
4	United States	58	84	160	140	129
5	Japan	43	56	73	72	53
6	Italy	43	38	56	57	36
7	United Kingdom	31	59	65	43	33
8	France	17	15	15	18	17
9	India	2	10	8	4	8
10	Canada	5	4	11	6	7
11	Australia	8	11	3	5	5
12	Brazil	2	3	8	6	5
13	Turkey	4	4	4	6	3
14	Argentina	-	1	1	2	2
15	Mexico	1	1	1	5	1
16	Saudi Arabia	-	-	-	-	1
17	Indonesia	-	-	-	-	1
18	South Africa	-	-	2	2	-
19	Russia	37	20	42	-	-
Total number of winners		1043	1126	1492	1451	1231

Source Red Dot (https://www.red:dot.org/), 2024.01
Note Aggregated by the sum of ①Product Design, ②Brands & Communication Design, and ③Design Concept after filtering by year for each G20 country

04 Design Education Institutions

1. Design University Ranking

Ranking	college	Country
1	Royal College of Art	United Kingdom
2	University of the Arts London	United Kingdom
3	Rhode Island School of Design (RISD)	United States
4	Parsons School of Design at The New School	United States
5	Massachusetts Institute of Technology (MIT)	United States
= 6	Aalto University	Finland
= 6	Pratt Institute	United States
8	Politecnico di Milano	Italy
9	Design Academy Eindhoven	Netherland
10	Tongji University	China
11	School of the Art Institute of Chicago	United States
12	The Glasgow School of Art	United Kingdom
13	Delft University of Technology	Netherland
14	Art Center College of Design	United States
15	Central Academy of Fine Arts (CAFA)	China
16	Savannah College of Art and Design	United States
17	Carnegie Mellon University	United States
18	Tsinghua University	China
19	RMIT University	Australia
20	The Hong Kong Polytechnic University	Hong Kong
21	School of Visual Arts (SVA)	United States
22	Goldsmiths, University of London	United Kingdom
23	The Royal Danish Academy of Fine Arts (KADK)	Denmark
24	California Institute of the Arts	United States
25	Emily Carr University of Art + Design	Canada
26	Konstfack University of Arts, Crafts and Design	Sweden
27	Stanford University	United States
28	University of Oxford	United Kingdom
29	**Seoul National University**	**South Korea**
30	Yale University	United States
31	Universität der Künste Berlin	Germany
32	Loughborough University	United Kingdom
33	Maryland Institute College of Art	United States
34	National University of Singapore (NUS)	Singapore
= 35	Krirk University	Thailand
= 35	University of Technology Sydney	Australia
37	Ecole Nationale Superieure des Arts Decoratifs (ENSAD)	France
38	Zurich University of the Arts	Switzerland
39	Nanyang Technological University, Singapore (NTU Singapore)	Singapore
= 40	Universität für Musik und darstellende Kunst Wien	Australia
= 40	École Nationale Supérieure de Création Industrielle, ENSCI Les Ateliers	France
42	University College London (UCL)	United Kingdom
43	University of Gothenburg	Sweden
44	The University of Tokyo	Japan
= 45	Universidad Nacional Autónoma de México (UNAM)	Mexico
= 45	University of Applied Arts Vienna	Australia
47	University of California, Los Angeles (UCLA)	United States
= 48	California College of the Arts	United States
= 48	New York University (NYU)	United States
50	Columbia University	United States

Source QS World University Rankings by Subject 2023- Art & Design

DESIGN
INDUSTRY
STATISTICS
OF KOREA

OF KOREA
STATISTICS
INDUSTRY
DESIGN

Appendix

Questionnaire

DESIGN
INDUSTRY
STATISTICS
OF KOREA

01 Questionnaire

승인번호 제 115026 호

2023 Design Industry Statistics of Korea (General Companies, Companies Utilizing Design)

Ministry of Trade, Industry and Energy

kidp 한국디자인진흥원 KOREA INSTITUTE OF DESIGN PROMOTION

Greetings. We extend our best wishes to your company in all its endeavors.

The Ministry of Trade, Industry and Energy, in collaboration with the Korea Institute of Design Promotion, is compiling the "2023 Design Industry Statistics of Korea." This initiative is in line with the objectives outlined in Article 10(2) of the Industrial Design Promotion Act, aiming to effectively implement a comprehensive plan for the promotion of industrial design.

This survey has received official approval under Article 18 of the Statistics Act. The survey will serve as crucial baseline data for effectively analyzing design policies and enhancing design competitiveness across various companies. We kindly request you to dedicate a few minutes to complete this survey.

Your responses will be treated with the strictest confidentiality in accordance with Article 33 of the Statistics Act. They will be solely utilized for statistical purposes. We sincerely ask for your honest responses.

September 2023

Ministry of Trade, Industry and Energy and Korea Institute of Design Promotion

Organizing Institute	Design Policy Research Center, Korea Institute of Design Promotion **Seon Kyung Yeon** **(T 031-780-2043, E ysk@kidp.or.kr)**	Research Institute	Kstat Research **Dae Young Yang** **(T 02-6188-6017, E dyyang@kstat.co.kr)**

A. Basic business status

★ **Please answer all questions below on the basis of the company, not the corporation.**

ID	※Filled in by the interviewer	Company ID	※Filled in by the interviewer
1. Name of company			
2. Company registration number			
3. Company address			
4. Main products and services offered	**Products** **Services**		
5. Founding year			
6. Corporation Size	① Large ② Midsize ③ Medium ④ Small		
7. Organization Type	① Sole proprietorships ② Corporate entity ③ Non-business corporation ④ Unincorporated organization]→ Type: ① Sole proprietorships ② Headquarters, main office, etc. ③ Factories, branches (stores), sales offices, etc. ※ **Non-business corporations:** Businesses, foundations, corporations, and special corporations (law firms, accounting firms, corporations, public corporations, etc.) established under the Civil Code or special laws. ※ **Unincorporated organizations:** Unincorporated organizations or groups, religious groups, cultural groups, or support groups, etc.		
8. Listing	① Listed ② Unlisted		
9. Women enterprise	① Women enterprise ② Not applicable		

▣ **Respondent Information**

Name of respondent		**Respondent contacts**	( ) -
Respondent department (team)		**Respondent position**	
		Major	① **Design Major** ② **Non-design Majors**

B. Survey of design utilization

SC1. The following are questions about your company's use of design.

Items	Yes	No
1) As of December 2022, did your company have a **design department**?	①	②
2) As of December 2022, did your company have any **designers** as employees? ※ Designer: One who has studied a design-related major or holds a certificate related to design work, or one who did not study a design-related major or does not hold a certificate but possesses at least two years of experience in design work among those hired as designers.	①	②
3) During 2021 and 2022, did your company hire **Specialized Design Companies or freelancers** to promote your business or company?	①	②

SC2. (If you responded "no" to all SC1 items): Reconfirmation question

1) Has your company launched a new product or changed the design of an existing product during 2021–2022?

① **Yes** ☞ Go to additional question 2) ② **No** ☞ End survey

(If the company has launched a new product or changed the design)

2) How did you design the new product or change the design (in-house, outsourced, etc.)?

▶ In-house: Double-check on the presence of design staff

▶ External: Double-check on the hiring of freelance or professional services

C. Status of design use

※ [Q1] should only be responded by companies with a design department in SC1.

Q1) Please check **all** that apply to how your company's **design department** is structured.

① Independent design organizations, such as corporate design centers and design institutes, exist.
② Design departments exist within R&D-related organizations such as R&D labs.
③ Design departments exist within organizations other than R&D, such as product planning and marketing.
④ Other( )

Q2) Please indicate your company's design utilization percentage. The utilization percentages total 100%.

Utilized Area	Scope	Percentage
① **Product Design**	Electrical and electronic product design, multipurpose machine and tool design, household and environmental product design, transportation equipment design, furniture design, manufacturing company headquarters design, and other product design	%
② **Visual Design**	Editorial design, food and drug package design, non-food and drug package design, advertisement design (print media), and other visual design	%
③ **Digital/Multimedia Design**	Video design, web design, game design, and other digital/multimedia design	%
④ **Space Design**	Architectural design, interior decoration design, exhibition and stage design, interior material design, exterior design, landscape and leisure space design, built environment design, and civil environment design	%
⑤ **Fashion/Textile Design**	Fashion design, functional fashion design, textile design, and miscellaneous goods design	%
⑥ **Service/Experience Design**	Service design, interaction design, and other service/experience design	%
⑦ **Industrial Crafts Design**	Metalworks, ceramics, textiles, woodworks, and other crafts	%
⑧ **Design Infrastructure**	Design mockups, design research and development, and other design services	%
Total		**100%**

Q3) Choose the number that best describes your company's **design utilization phase**.

① Design is a crucial aspect of a company's strategy.
② Design is essential but not the centerpiece of a company's development phase.
③ Design is utilized in the final stage to enhance the appeal of the final product.
④ The company does not utilize design systematically.

Q4) Please indicate the percentage of your company's **design development services by contract type.** The utilization percentages total 100%.

Item	Contracts per project	Annual contracts	Total
Percentage	%	%	**100%**

※ Contract per project: A single contract designed to develop and improve the design of a specific product or service.
※ Annual contract: An annual contract for the development and refinement of the design of a product or service, which includes work to supplement the design developed and refined during the term.

Q4-1) Please indicate the level of **satisfaction with the quality** of the design services your company has commissioned for development by **contract type**.

※ Only indicate the level of satisfaction with the type of contract answered in Q4).

Item	Not at all satisfied	Not that satisfied	Averagely satisfied	More or less satisfied	Very satisfied
Contracts per project	①	②	③	④	⑤
Annual contracts	①	②	③	④	⑤

※ Contract per project: A single contract designed to develop and improve the design of a specific product or service.
※ Annual contract: An annual contract for the development and refinement of the design of a product or service, which includes work to supplement the design developed and refined during the term.

D. Design investment performance

Q5) Please indicate your company's **business performance in 2022**.

Item		10T	1T	100 B	10 B	1B	100 M	10 M	1M
① **Revenue**	Total revenue earned from business activities during the year								
② **Labor costs**	Allowances paid to employees for labor costs, such as salaries, benefits, and retirement benefits.								
③ **R&D costs**	The sum of research, development, and general development expenses								
④ **Operating profit**	Revenue - Operating expenses (cost of goods sold, SG&A, etc.)								

Q6) Please indicate your company's design investment in **2022 and the cost and number of design developments.**

※ The cost of "② Design service costs (outsourced)" and "Ⓑ Outsourced design development" should be identical. Outsourced design development should equal the "by outsourced type" total and the "by domestic and foreign type" total.

Item	10T	1T	100B	10B	1B	100M	10M	1M	Design development cost		Number of Design Developments
Total design investment (①+…+⑦)									**Total Ⓐ+Ⓑ** Million Won		**Total Ⓐ+Ⓑ** Cases
① Internal designer labor costs									**Ⓐ In-house design development** *Designs developed by in-house personnel Million Won		**ⓐ In-house design development** Cases
② Design service costs (outsourced)									**Ⓑ Outsourced design development** (Ⓑ = ㉠+㉡+㉢+㉣ = ㉮+㉯) *Designs developed by external organizations and personnel Million Won		**ⓑ Outsourced design development** (ⓑ= ㉠+㉡+㉢+㉣ = ㉮+㉯) Cases
③ Design machinery/devices and software costs Machine/device and SW purchase/management costs for design development									By outsourced type	**㉠ Affiliates specializing in design within the group** Million Won	**㉠ Affiliates specializing in design within the group** Cases
④ Land/building costs for design and R&D Land for design R&D, building purchase/renovation costs, lease payments, etc.										**㉡ External professional design companies** Million Won	**㉡ External professional design companies** Cases
⑤ Design/designer training costs										**㉢ Freelancers** Million Won	**㉢ Freelancers** Cases
⑥ Costs for acquisition and management of design intellectual property rights Acquisition and administration costs for design-related intellectual property (Patents, utility models, designs, trademarks, etc.)										**㉣ Other design service costs** Million Won	**㉣ Other design service costs** Cases
⑦ Other design-related operating costs Other expenses such as costs of materials for design research, handouts, supplies, travel, etc.									By domestic and foreign type	**㉮ Domestic referrals** Million Won	**㉮ Domestic referrals** Cases
										㉯ International referrals Million Won	**㉯ International referrals** Cases

Q7) What is your company's **outlook on design investment and hiring designers** in the future?

Write 100% if it is the same as 2022, 50% if it is half of 2022, 200% if doubled, etc.

Item	Outlook to 2023		Outlook to 2024	
① Outlook on design investment	( )% of 2022		( )% of 2022	
② Outlook on hiring designers	If you have a designer	( )persons, ( )% of 2022	If you have a designer	( )persons, ( )% of 2022
	If you do not have a designer	( ) job openings	If you do not have a designer	( )job openings

Q8) Please fill in the **percentage of factors** influencing your company's **revenue.**

Factors	Design	Brand	Corporate image	Marketing (PR/Advertising)	Customer services	Product performance	Distribution	Total
Weight by factor	%	%	%	%	%	%	%	100%

※ Corporate image: Corporate eco-friendliness, ethics, and reliability
※ Service providers are to respond with elements in parentheses

Q9) Please list any **design certifications, awards, and IPR filings/registrations owned by your company** in 2022.

Item	Domestic	Overseas
Design awards	Cases	Cases
Patent/Utility Model/Design/Trademark filings	Cases	Cases
Patent/Utility Model/Design/Trademark Registrations	Cases	Cases

※ Example of a design-related award
:(Domestic) Good Design (GD), Korea International Design Award, Design Korea Award, etc.
:(Overseas) German iF Design Award, German Red Dot Design Award, US IDEA, Japanese Good Design Award, etc.

E. Design stature and contributions

Q10) Please **select all stages** in which your designer or the Specialized Design Companies who have commissioned the service are involved in the following new product (service) development process.

Item		(Only companies hiring designers in SC1 on page 2) Designer involvement	Involvement of Specialized Design Companies	Freelance designer involvement
Planning and strategies	Market research	①	①	①
	Deriving strategy	②	②	②
	Establishing concepts	③	③	③
Design development	Discovering ideas	④	④	④
	Creating design mockup	⑤	⑤	⑤
	Sample creation and user validation	⑥	⑥	⑥
Post management	Rightsizing your design	⑦	⑦	⑦
	Managing mass production	⑧	⑧	⑧
	Public relations and marketing	⑨	⑨	⑨

Q11) To what extent do you think your company's **investment in and utilization of design** has contributed to each of the following?

Item	Not at all contributed	Not much contributed	Average	Contributed a little	Contributed significantly
Increased revenue	①	②	③	④	⑤
Increased customer satisfaction (including enhanced corporate image)	①	②	③	④	⑤
Increased product and brand loyalty	①	②	③	④	⑤
Increased product and brand awareness	①	②	③	④	⑤
Created technology-design convergence	①	②	③	④	⑤
Contributed to creating new businesses such as new products	①	②	③	④	⑤

Q12) What are the challenges of **utilizing design** in your company? Please **select only two** in order.

1st: _____, 2nd: _____

① Lack of design experts and capacity of specialized companies
② Difficulty communicating with designers
③ Difficulty securing design experts
④ Difficulty in selecting a good specialized company
⑤ Difficulty securing a budget
⑥ Burden of design development expenses
⑦ Other( )

Q13) The Ministry of Trade, Industry and Energy established compensation standards and actively recommended the **“Standard Design Contract”** to **clarify the rights and obligations between design service parties.** Does your company use the **“Standard Design Contract”**?

① Yes ☞ **To Q15** ② No ☞ **To Q14-1**

Q13-1) Why doesn’t your company use the **“Standard Design Contract”**?

① It does not know that a Standard Contract exists
② The contract is difficult to understand
③ It uses its own contract
④ The price of the service is not suitable
⑤ Other( )

F. Design workforce

※ Write the number of employees and designers in the design department only if applicable.

Q14) Please indicate your organization's **workforce** as of December 31, 2022.

Item	① Permanent workers			② Temporary and day-to-day workers			Total (①+②)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Total number of employees	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons
Number of designers	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons
Number of administrative employees	persons			persons			persons		
Number of R&D employees	persons			persons			persons		
Number of skilled/production employees	persons			persons			persons		

Item	① Permanent workers			② Temporary and day-to-day workers			Total (①+②)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Number of employees in the design department (including support staff)	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons

※ Permanent workers: Workers employed for an unlimited period of time and subject to human resource management regulations and receive bonuses and other benefits, or those who have contracted employment for more than one year outside of a company.

※ Temporary and day-to-day workers: Workers whose employment contract is for less than one year and who are paid by the company.

※ Designers: One among hired designers who has studied a design-related major or holds a certificate related to design work, or one who did not study a design-related major or does not hold a certificate but possesses at least two years of experience in design work.

※ Q15) through 21) are only for designer hiring companies in SC1.
Companies that do not employ designers respond from ☞ Q23)

Q15) This question is about the **status of designers** in your company as of December 31, 2022.

By job title	Employee	Deputy	Chief/Deputy Chief	Director	Executive/ Director level	Vice President/ President	Total
	persons	persons	persons	persons	persons	persons	※ Write the same as the number of designers in Q13
By age	Under 30	30s	40s	50s	60 and older		
	persons	persons	persons	persons	persons		
By education	High School or less	Community college	University	Master's	Doctorate		
	persons	persons	persons	persons	persons		

Q16) This question concerns your company's number of job openings and hires of **experienced and new recruits and retirees** during 2022.

Item	Job openings		Hired		Retirees	
	Experienced	New	Experienced	New	Experienced	New
Entire company	persons	persons	persons	persons	persons	persons
Designers	persons	persons	persons	persons	persons	persons

※ Number of permanent workers
※ Job openings: Number of jobs posted
※ Hired employees: Number of final hires

Q16-1) **(If you responded to have retired designers in Q17)**
Please write down the **tenure of the designers who left your company** in 2022.

Item	Less than 1 year	1–3 years	3–5 years	5–10 years	More than 10 years	Total
Number of retirees	persons	persons	persons	persons	persons	persons

Q17) What is your **primary channel for hiring designers?** Please select **two responses**.

1st: _____, **2nd:** _____

① Job sites
② Recruitment via the company's homepage/social media
③ Referrals from acquaintances (school, workplace, etc.)
④ Scouting personnel from the same industry
⑤ School Career Center
⑥ Public Employment Support Center
⑦ Recruitment at job fairs
⑧ Other( )

Q18) Why is it **difficult to hire designers**? Please select **two responses.**

1st: _____, **2nd:** _____

① Failure to actively recruit
② Intense competition with other companies to attract talent
③ No applicants possessing the education and qualifications required by the company
④ No applicants possessing the experience required by the company
⑤ The wages and hours offered by the business do not match the job seeker's expectations
⑥ Company's location and work environment
⑦ It is a job that job seekers do not want, such as 3D jobs.
⑧ Other ( )

G. Designer education cost

Q19) Please **select all** the **designer retraining methods** conducted in your company in 2022.

① In-house training (internal instructors)
② In-house special lectures (external instructors)
③ Outsourced training (paid)
④ Studying abroad (excluding degree programs)
⑤ (Domestic and international) degree programs
⑥ Conferences, seminars, or exhibitions
⑦ Use of government/publicly funded free education (online)
⑧ Use of government/publicly funded free education (offline)
⑨ No retraining conducted

Q20) What **retraining** is required to improve designers' skills at your company? Please **select all.**

Design skills	Business skills	Convergence skills
① Ability to utilize design-related SW	⑧ Ability to utilize trends	⑮ Creativity
② Design expressiveness	⑨ Planning skills (business planning and strategy formulation, etc.)	⑯ Teamwork (collegiality)
③ Design research skills		⑰ Leadership
④ CMF-related skills	⑩ Marketing skills	⑱ Interdisciplinary skills (engineering, etc.)
⑤ UI/UX design	⑪ Presentation skills	⑲ Understanding of emerging technologies(AI, AR, VR, etc.)
⑥ Service design methodology and practice	⑫ Communication skills	⑳ Statistical skills
⑦ Brand development	⑬ Foreign language skills	㉑ Ability to understand and utilize domestic and international market information
	⑭ Report-writing skills	

Q21) Please select the **two biggest challenges in retraining designers.**

1st: _____, **2nd:** _____

① Lack of budget for training
② Unpredictable work situations
③ Lack of time/substitute workers
④ Lack of awareness from management and relevant departments
⑤ Lack of quality retraining programs
⑥ Lack of information on retraining
⑦ Lack of specialized retraining organizations
⑧ Return on investment, including turnover after retraining
⑨ Other ( )

H. Overseas Business Status

Q22) Does your company currently have any **overseas business** or **plans to have one in the future**?

① In progress ② Planned for the future ⇒ To Q22-3 ③ No plan ⇒ To Q23

Q22-1) What is the form of your company's **overseas business**? Please select two responses.

1st: _____, **2nd:** _____

① Establishing and operating a corporation overseas
② Operating a liaison office overseas (unregistered)
③ Collaboration with overseas companies, including partnerships
④ Utilizing local experts abroad (business development, designers, etc.)
⑤ Conducting industry–academic projects with overseas universities
⑥ Promoted domestically (including local travel, if necessary)
⑦ Entering overseas online distribution channels
⑧ Entering overseas offline distribution channels
⑨ Finding buyers through participation in overseas exhibitions

Q22-2) Which **region does your company operate business in?** Please write the specific country (region).

① China (Region:)
② Asia (Country:)
③ Europe (Country:)
④ USA (Country:)
⑤ Other (Country:)

Q22-3) In which areas does your company require **government support to expand overseas and export products?** Please select two responses in order.

1st: _____, **2nd:** _____

① Overseas expansion/export training
② Diagnosis and improvement in your company's global capabilities
③ Overseas market research
④ Participation in overseas exhibitions
⑤ Overseas buyer consultation
⑥ Support for overseas online business (online mall)
⑦ Support for overseas offline business
⑧ Support for overseas local business spaces
⑨ Building a network of overseas organizations/companies
⑩ Export subsidies
⑪ English contracts and brochures
⑫ Other ( )

I. Government policy and demand for support

Q23) Which **design-related government support** does your company need the most? Please select two responses in order.

1st: _____, 2nd: _____

① Design education support
② Increased funding (loans, grants, etc.)
③ R&D and technical support
④ Support in export and international cooperation
⑤ Connection with designers (including internship support)
⑥ Connection with Specialized Design Companies
⑦ Maintenance of related system and deregulation
⑧ Other( )

J. Design trends

Q24) In the era of digital transformation, has there been a case where your company **utilized new technologies in its design work?** Choose the application stage and describe the case in detail.

※ What is Digital Transformation?
Refers to increasing the efficiency in corporate operations and innovatively transforming the business structure through software convergence activities utilizing new software technologies (Internet of Things, big data, artificial intelligence (AI), cloud computing, blockchain, etc.) in the fields of product, process, business model, and platform innovations.

(Example) Market research and idea generation using Open AI (ChatGPT, etc.), design mockups (logos, posters, etc.) using Midjourney, Canva, etc., and prototype visualization using AR/VR technology

Item		Stage	Case
Planning and strategies	Conducting market research	☐	
	Deriving strategy	☐	
	Setting up concepts	☐	
Design development	Discovering ideas	☐	
	Creating design mockup	☐	
	Ensuring sample creation and user validation	☐	
Post management	Rightsizing your design	☐	
	Managing mass production	☐	
	Engaging in public relations and marketing activities	☐	

Q25) Does your company consider “eco-friendliness factors” when developing designs?

Not at all	Not really	Somewhat	Yes	Very much
①	②	③	④	⑤

Q26) What are the barriers to “design development that considers eco-friendliness” in your company? Please select **two responses** in order.

1st: _____, 2nd: _____

① Lack of knowledge/know-how
② Decreased quality
③ Decreased price competitiveness
④ Customer dissatisfaction
⑤ Lack of experts and specialists
⑥ Increased development time
⑦ Other( )

♣ Thank you very much for your cooperation in the survey. ♣

승인번호 제 115026 호

2023 Design Industry Statistics of Korea (Specialized Design Companies)

Ministry of Trade, Industry and Energy

kidp 한국디자인진흥원 KOREA INSTITUTE OF DESIGN PROMOTION

Greetings. We extend our best wishes to your company in all its endeavors.

The Ministry of Trade, Industry and Energy and the Korea Institute of Design Promotion are compiling the "2023 Design Industry Statistics of Korea." This initiative is aimed at effectively implementing a comprehensive plan for the promotion of industrial design, as stipulated in Article 10(2) of the Industrial Design Promotion Act.

This survey is an approved statistic under Article 18 of the Statistics Act. It is an important survey that will serve as baseline data for effectively analyzing design policies and enhancing design competitiveness across companies. We kindly request that you to take a few minutes to complete the survey.

Your responses will be treated with utmost confidentiality in accordance with Article 33 of the Statistics Act and will only be used for statistical purposes. Your honest responses are highly appreciated.

September 2023

Ministry of Trade, Industry and Energy and Korea Institute of Design Promotion

Organizing Institute	Design Policy Research Center, Korea Institute of Design Promotion **Seon Kyung Yeon** **(T 031-780-2043, E ysk@kidp.or.kr)**	Research Institute	Kstat Research **Dae Young Yang** **(T 02-6188-6017, E dyyang@kstat.co.kr)**

A. Basic business status

★ **Please answer all questions below in accordance with the company, not the corporation.**

ID	※Filled in by the interviewer	Company ID	※Filled in by the interviewer
1. Name of company			
2. Company registration number			
3. Company address			
4. Address type	**Kindly mark the appropriate box if the above address applies to you**	☐ Company address is separate from residence ☐ Company address is the residence address	
5. Main products and services offered	**Products**		
	Services		
6. Founding year			
7. Organization Type	① Sole proprietorships ② Corporate entity ③ Non-business corporation]→ Type: ① Sole proprietorships ② Headquarters, main office, etc. ③ Factories, branches (stores), sales offices, etc. ※ **Non-bisiness corporations** Businesses, foundations, corporations, and special corporations (law firms, accounting firms, corporations, public corporations, etc.) established under the Civil Code or special laws.		
8. Listing	① Listed ② Unlisted		
9. Women enterprise	① Women enterprise ② Not applicable		
10. Registration as specialized design company	① Registered ※ **Please check all the registered fields.** (☞ ① Visual Design ② Packaging Design ③ Product Design ④ Environmental Design ⑤ Multimedia ⑥ Service Design ⑦ Others : _____) ② Unregistered		

▣ **Respondent information**

Name of respondent		**Respondent contacts**	( ) -
Respondent department (team)		**Respondent position**	
		Major	① **Design Major** ② **Non-design Majors**

B. Status of design use

Q1) Please indicate the weight of your company's **primary design focus**. The sum of the weights is 100%.

Areas of focus	Scope	Percentage
① **Product Design**	Electrical and electronic product design, multipurpose machine and tool design, household and environmental product design, transportation equipment design, furniture design, manufacturing company headquarters design, and other product design	%
② **Visual Design**	Editorial design, food and drug package design, non-food and drug package design, advertisement design (print media), and other visual design	%
③ **Digital/Multimedia Design**	Video design, web design, game design, and other digital/multimedia design	%
④ **Space Design**	Architectural design, interior decoration design, exhibition and stage design, interior material design, exterior design, landscape and leisure space design, built environment design, and civil environment design	%
⑤ **Fashion/Textile Design**	Fashion design, functional fashion design, textile design, and miscellaneous goods design	%
⑥ **Service/Experience Design**	Service design, interaction design, and other service/experience design	%
⑦ **Industrial Crafts Design**	Metalworks, ceramics, textiles, woodworks, and other crafts	%
⑧ **Design Infrastructure**	Design mockups, design research and development, and other design services	%
Total		**100%**

C. Workforce Status

Q2) This question is about your company's **workforce** as of December 31, 2022.

Item	① Permanent workers			② Temporary and day-to-day workers			Total (①+②)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Total number of employees (①+②+③+④)	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons
① Number of designers	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons
② Number of administrative employees	persons			persons			persons		
③ Number of R&D employees (excluding designers)	persons			persons			persons		
④ Number of skilled/production employees	persons			persons			persons		

Item	① Permanent workers			② Temporary and day-to-day workers			Total (①+②)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Design department (including support staff)	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons	( ) persons

※ Permanent workers: Workers employed for an unlimited period of time and subject to human resource management regulations, with bonuses and other benefits, or those who have contracted employment for more than one year outside of a company.

※ Temporary and day-to-day workers: Workers whose employment contract is for less than one year and who are paid by the company.

※ Designers: One among hired designers who has studied a design-related major or holds a certificate related to design work, or one who did not study a design-related major or does not hold a certificate but possesses at least two years of experience in design work.

Q3) This question is about the **number of designers** in your organization **by position, age, and education** as of December 31, 2022.

By job title	Employee	Deputy	Chief/Deputy Chief	Director	Executive/ Director level	Vice President/ President	Total
	persons	persons	persons	persons	persons	persons	※ Write the same as the number of designers in Q2
By age	Under 30	30s	40s	50s	60 and older		
	persons	persons	persons	persons	persons		
By education	High School or less	Community college	University	Master's	Doctorate		
	persons	persons	persons	persons	persons		

Q4) This question concerns your company's **job openings and hires of experienced and new recruits and retirees** during 2022.

Item	Job openings		Hired		Retirees	
	Experienced	New	Experienced	New	Experienced	New
Entire company	persons	persons	persons	persons	persons	persons
Designers	persons	persons	persons	persons	persons	persons

※ Number of permanent workers
※ Job openings: Number of jobs posted
※ Hired employees: Number of final hires

Q4-1) **(If you responded to have retired designers in Q4)**
Please specify the **tenure of the designers who left your company** in 2022.

Item	Less than 1 year	1–3 years	3–5 years	5–10 years	More than 10 years	Total
Number of retirees	persons	persons	persons	persons	persons	persons

Q5) Did your company hire the services of an external designer during 2022? If so, how many?
① Yes (persons) ② No

Q6) What is your **primary channel for hiring designers?** Please select **two responses.**
1st: , **2nd:**

① Job sites
② Recruitment via the company's website/social media
③ Referrals from acquaintances (school, workplace, etc.)
④ Scouting personnel from the same industry
⑤ School career center
⑥ Public employment support center
⑦ Recruitment at job fairs
⑧ Other( )

Q7) Why is it **difficult to hire designers**? Please select **two responses.**

1st:_____, 2nd:_____

① Failure to actively recruit
② Intense competition with other companies to attract talent
③ No applicants with the education and qualifications required by the company
④ No candidates with the experience required by the company
⑤ The wages and hours offered by the business do not match the job seeker's expectations
⑥ Company's location and work environment
⑦ It is a job that job seekers do not want, such as 3D jobs.
⑧ Others( )

Q8) What are the **factors to consider when hiring a designer?** Please select **two responses.**

1st:_____, 2nd:_____

① Degree
② Certificate
③ Career
④ Portfolio
⑤ Applicant's personality/attitude
⑥ Others( )

D. Design business performance

Q9) This is a question about your company's **business performance in 2022**.
Please write down your **sales by each item**.

Item	100 B	10 B	1 B	100 M	10 M	1 M		Revenue composition		
								Total for each composition	Revenue	Number of services
① **Revenue** Total revenue earned from business activities during 2022							▶	① **Revenue=** ㉠+㉡+㉢+㉣+ ㉤+㉥+㉦+㉧	Million Won	Cases
② **Labor costs** Labor costs, such as salaries, benefits, and contribution to provision for severance benefits(including other employee benefits and commissions)							Domestic	㉠ **Design consulting**	Million Won	Cases
③ **R&D costs** The sum of research and development expenses(design, etc.) and general development expenses								㉡ **Design and development services**	Million Won	Cases
④ **Operating profit** Revenue - Operating expenses(cost of goods sold, SG&A, etc.)								㉢ **Development and sales of own products**	Million Won	Cases
								㉣ **Intellectual property royalties**	Million Won	Cases
								㉤ **Other** (subscribed services, etc.)	Million Won	Cases
							Over-seas	㉥ **Design consulting**	Million Won	Cases
								㉦ **Design and development services**	Million Won	Cases
								㉧ **Development and sales of own products**	Million Won	Cases
								㉨ **Intellectual property royalties**	Million Won	Cases
								㉩ **Other** (subscribed services, etc.)	Million Won	Cases

Q10) Does your company operate in **business areas other than the design business**?

① Yes, the company operates other businesses (Business details:)

② No, the company does not operate other businesses

Q11) Please indicate the **proportion of domestic and international customers** in your company (based on 2022 revenue).

Item	Company size				Public agencies (Public companies, etc.)	Government /Municipal	Total
	Large	Midsize	Medium	Small			
Domestic	%	%	%	%	%	%	100%
Overseas	%	%	%	%	%	%	100%

Q12) This question is about **your company's operating expenses in 2022.**

Item		100 billion	10 billion	Billion	100 million	10 million	Million
① Hired designer's labor costs							
②-1 Design service costs (subcontract)	Design service costs other than owned technology						
②-2 Other service costs	Mock-up/mold production costs, in-house product production costs, etc.						
③ Equipment and software	Costs of purchasing and maintaining expensive instruments, devices, computer systems, and applications for research and development						
④ Land/Buildings for R&D (Acquisition costs, such as rent)	Land and building costs for research and development Spending for major repairs and more						
⑤ Training costs	Spending on training-related seminars, workshops, etc.						
⑥ Costs for acquisition and management of intellectual property rights	Acquisition and management costs for design-related intellectual property rights (patents, utility models, designs, trademarks, etc.)						
⑦ Other operating costs	Other expenses for research, such as materials, handouts, supplies, travel, etc.						
Total operating expenses (①+...+⑦)							

Q13) This question is about your company's **future revenue and operating expenses, research and development investments, and designer employment prospects.** Write 100% if it's the same as 2022, 50% if it's half of 2022, 200% if doubled, etc.

Item	Outlook to 2023	Outlook to 2024
① **Outlook on revenue**	( )% of 2022	( )% of 2022
② **Outlook on operating expenses**	( )% of 2022	( )% of 2022
③ **Outlook on research and development investment**	( )% of 2022	( )% of 2022
④ **Outlook on hiring designers**	( )% of 2022, ( )persons	( )% of 2022, ( )persons

Q14) What is the company's plan in terms of **increasing revenue** in the future?

① Expand domestic service orders ② Expand into international markets
③ Expand scope to comprehensive consulting ④ Develop and sell own products
⑤ Differentiation with specialized design expertise
⑥ Other( )

Q15) Please indicate the percentage of your company's **design development services by each contract type**. The utilization percentage totals 100%.

Item	Contracts per project	Annual contracts	Total
Percentage	%	%	100%

※ Contract per project: A single contract to develop and improve the design of a specific product or service.

※ Annual contract: An annual contract for the development and refinement of the design of a product or service, which includes work to supplement the design developed and refined during the term.

Q15-1) Please indicate the level of **satisfaction with the quality** of the design services your company has commissioned for development by **contract type**.

※ Only indicate the satisfaction with the type of contract answered in Q15).

Item	Not at all satisfied	Not that satisfied	Averagely satisfied	More or less satisfied	Very satisfied
Contracts per project	①	②	③	④	⑤
Annual contracts	①	②	③	④	⑤

※ Contract per project: A single contract to develop and improve the design of a specific product or service.

※ Annual contract: An annual contract for the development and refinement of the design of a product or service, which includes work to supplement the design developed and refined during the term.

Q16) Please list the **design certifications, awards, and IPR filings/registrations owned by your company and client companies in 2022**.

Item	① Owned by your company		② Owned by client company	
	Domestic	Overseas	Domestic	Overseas
Design-related awards	cases	cases	cases	cases
Patent/Utility Model/Design/Trademark filings	cases	cases	cases	cases
Patent/Utility Model/Design/Trademark registrations	cases	cases	cases	cases

※ Fill according to design ownership (name)

※ Example of a design-related award

:(Domestic) Good Design (GD), Korea International Design Award, Design Korea Award, etc.

:(Overseas) German iF Design Award, German Red Dot Design Award, US IDEA, Japanese Good Design Award, etc.

E. Overseas Business Status

Q17) Does your company currently have any overseas business or plans to have one in the future?

① In progress ⇒ To Q17-1
② Planned for the future ⇒ To Q17-5
③ No plans ⇒ To Q17-7

Q17-1) **(If you responded "① In progress" in Q17)**

What is the **main focus of your company's overseas business**?

① Design consulting
② Design development services
③ Develop and sell own products
④ Intellectual property royalties
⑤ Other(Subscribed services, etc.)

Q17-2) **(If you responded "① In progress" in Q17)**

What is the form of your company's **overseas business**?
Please select **two responses**.

1st: , 2nd:

① Establishing and operating a corporation overseas
② Operating a liaison office overseas (unregistered)
③ Collaborating with overseas companies, including partnerships
④ Utilizing local experts abroad (business development, designers, etc.)
⑤ Conducting industry-academic projects with overseas universities
⑥ Promoting domestically (including local travel if necessary)
⑦ Entering overseas online distribution channels
⑧ Entering overseas offline distribution channels
⑨ Finding buyers through participation in overseas exhibitions

Q17-3) **(If you responded "① In progress" in Q17)**

What are the methods through which your company **finds international buyers and clients**? Please select **two responses**.

1st: , 2nd:

① Utilize social media (LinkedIn, Instagram, etc.)
② Utilize media outlets (articles, magazines, booklets, etc.)
③ Search engine advertisements
④ Consider foreign intermediary companies
⑤ Participate in international exhibitions
⑥ Participate in export counseling sessions
⑦ Utilize human network
⑧ Other( )

Q17-4) **(If you responded "① In progress" in Q17)**

Which **region does your company operate business in**? Please write the specific country (region).

① China (Region:) ② Asia (Country:)
③ Europe (Country:) ④ USA (Country:)
⑤ Other (Country:)

Q17-5) **(If you responded "① In progress" and "② Planned for the future" in Q17)**

Where does your company hope to do **business in the future**?
Please select two in order and include the specific country (region).

1st: , **2nd:**

① China (Region:) ② Asia (Country:)
③ Europe (Country:) ④ USA (Country:)
⑤ Other (Country:)

Q17-6) **(If you responded "① In progress" and "② Planned for the future" in Q17)**

What area does your company need **government support in to expand overseas and export products**? Please select **two responses** in order.

1st: , **2nd:**

① Training on overseas expansion/export
② Diagnosis and improvement in your company's global capabilities
③ Overseas market research
④ Participation in overseas exhibitions
⑤ Overseas buyer consultation
⑥ Support for overseas online business (online mall)
⑦ Support for overseas offline business
⑧ Support for overseas local business spaces
⑨ Building a network of overseas organizations/companies
⑩ Export subsidies
⑪ English contracts and brochures
⑫ Other( )

⇒ To Q18

Q17-7) **(If you responded "③ No plan" in Q17)**

Why doesn't your company expand internationally?

1st: , 2nd:

① Focus on domestic business
② Lack of overseas sales channels
③ Lack of experience in overseas trading
④ Lack of staff dedicated to overseas operations
⑤ Concerns about infringement of design rights
⑥ High cost of international expansion
⑦ Other( )

F. Designer education

Q18) Please select all the designer retraining methods conducted in your company in 2022.

① In-house training (internal instructors)
② In-house special lectures (external instructors)
③ Outsourced training (paid)
④ Study abroad (excluding degree programs)
⑤ Domestic and international degree programs
⑥ Conferences, seminars, or exhibitions
⑦ Use of government/publicly funded free education (online)
⑧ Use of government/publicly funded free education (offline)
⑨ No retraining conducted

Q19) What **retraining** is required to improve designers' skills at your company? Please **select all.**

Design skills	Business skills	Convergence skills
① Ability to utilize design-related software	⑧ Ability to utilize trends	⑮ Creativity
② Design expressiveness	⑨ Planning skills (business planning and strategy formulation, etc.)	⑯ Teamwork (collegiality)
③ Design research skills	⑩ Marketing skills	⑰ Leadership
④ CMF-related skills	⑪ Presentation skills	⑱ Interdisciplinary skills (engineering, etc.)
⑤ UI/UX design	⑫ Communication skills	⑲ Understanding of emerging technologies (AI, AR, VR, etc.)
⑥ Service design methodology and practice	⑬ Foreign language skills	⑳ Statistical skills
⑦ Brand development	⑭ Report-writing skills	㉑ Ability to understand and utilize domestic and international market information

Q20) Please select the **two biggest challenges in retraining designers.**

1st: _____, **2nd:** _____

① Lack of budget for training
② Unpredictable work situations
③ Lack of time/substitute workers
④ Lack of awareness from management and relevant departments
⑤ Lack of quality retraining programs
⑥ Lack of information on retraining
⑦ Lack of specialized retraining organizations
⑧ Return on investment, including turnover after retraining
⑨ Other ( )

G. Government policy and demand for support

Q21) Which **government support** does your company need the most? Please select **two responses** in order.

1st: _____, **2nd:** _____

① Workforce training support
② Increased funding (loans, grants, etc.)
③ R&D and technical support
④ Support in export and international cooperation
⑤ Bidding information support
⑥ Maintenance of related system and deregulation
⑦ Other( )

Q22) What areas of **support do you think the government should strengthen for your company to hire the talent** it wants?

1st: _____, **2nd:** _____

① Support in university-company linkage activities (eg., Contract department)
② Cultivate more talents in related fields
③ Support training for retraining
④ Support internships
⑤ Support companies' recruitment, such as providing labor information
⑥ Develop and operate relevant professional certifications
⑦ Support various open-ended contests
⑧ Direct labor costs support
⑨ Support industry–academia collaboration
⑩ Other( )

H. Design trends

Q23) In the era of digital transformation, has your company **utilized new technologies in its design work**? Choose the stage and describe the case in detail.

※ What is Digital Transformation?
Refers to increasing the efficiency in corporate operations and innovatively transforming the business structure through software convergence activities utilizing new software technologies (Internet of Things, big data, artificial intelligence (AI), cloud computing, blockchain, etc.) in the fields of product, process, business model, and platform innovations.
(Example) Market research and idea generation using Open AI (ChatGPT, etc.), design mockups (logos, posters, etc.) using Midjourney, Canva, etc., and prototype visualization using AR/VR technology.

Item		Stage	Case
Planning and strategies	Conducting market research	☐	
	Deriving strategy	☐	
	Setting up concepts	☐	
Design development	Discovering ideas	☐	
	Creating design mockup	☐	
	Ensuring sample creation and user validation	☐	
Post management	Rightsizing your design	☐	
	Managing mass production	☐	
	Engaging in public relations and marketing activities	☐	

Q24) Does your company consider “eco-friendliness factors” when developing designs?

Not at all	Not really	Somewhat	Yes	Very much
①	②	③	④	⑤

Q25) What do you think are the challenges to expanding “design that considers eco-friendliness” to industrial sites? Please select **two responses** in order.

1st: _____, 2nd: _____

① Lack of knowledge/know-how
② Decreased quality
③ Decreased price competitiveness
④ Lack of consumer interest
⑤ Lack of material diversity
⑥ Lack of customer interest
⑦ Lack of manufacturing infrastructure
⑧ Other( )

♣ Thank you very much for your cooperation in the survey. ♣

승인번호 제 115026 호

2023 Design Industry Statistics of Korea (Public Sector)

Ministry of Trade, Industry and Energy

kidp 한국디자인진흥원 KOREA INSTITUTE OF DESIGN PROMOTION

To be filled in by the interviewer	ID						List No					

Greetings.

The Ministry of Trade, Industry and Energy, in collaboration with the Korea Institute of Design Promotion, is compiling the “2023 Design Industry Statistics of Korea.” This initiative is aimed at effectively implementing a comprehensive plan for the promotion of industrial design in accordance with Article 10(2) of the Industrial Design Promotion Act.

This survey is an authorized statistic under Article 18 of the Statistics Act. It serves to identify the supply of and demand for design by local governments and central administration, measure effectiveness, and provide baseline data for government support plans and policies.

All responses collected will be statistically analyzed and exclusively used for research purposes. The contents of the survey and your personal information will be safeguarded in accordance with the provisions of Article 33 of the Statistics Act.

Thank you for taking the time out of your busy schedule to complete the survey.

September 2023

Ministry of Trade, Industry and Energy and Korea Institute of Design Promotion

Organizing Institute	Design Policy Research Center, Korea Institute of Design Promotion Sun Kyung Yeon, Research Associate T 031-780-2043 E ysk@kidp.or.kr	Research Institute	Kstat Research Dae Young Yang, Senior Researcher T 02-6188-6017 E dyyang@kstat.co.kr

■ Overview of organization

Filled in by interviewer				
	Local governments	① Metropolitan City/Province ② City ③ County ④ District	**Government administration**	① Department ② Ministry ③ Agency
	Name of organization			
	Name of respondent		**Respondent contacts**	( ) -
	Respondent department (team)		**Respondent position**	
			Major	① Design major ② Non-design majors

Q1) Does your organization currently have a separate design office (team or group), bureau, department dedicated to design or a designer?

① There is a dedicated design department. ☞ **Respond to Q1-1) ~ Q1-3)**

② There is no design department; there are only designers. ☞ **Respond to Q1-3) ~ Q1-5)**

③ There is no design department or designers. ☞ **Respond to Q1-4) ~ Q1-5)**

※ Designers: One among hired designers who has studied a design-related major or holds a certificate related to design work, or one who did not study a design-related major or does not hold a certificate but possesses at least two years of experience in design work.

Q1-1) **(To be responded by organizations with a dedicated design department)**

Please fill in **the department and name of your design team**.

Please write all the departments if they are classified into multiple departments.

No	Bureau/Office/Headquarters	Division	Department	Team
1				
2				
3				
4				
5				

Q1-2) **(To be responded by organizations with a dedicated design department)**

Please indicate your organization's **2022 budget execution amount.**

No	Name of dedicated design department	Design support budget						Design service costs						Dedicated design departments' total labor costs						Labor costs paid to non-employed personnel, such as freelancers, mock-up production costs, printing costs					
		100 B	10 B	1 B	100 M	10 M	1 M	100 B	10 B	1 B	100 M	10 M	1 M	100 B	10 B	1 B	100 M	10 M	1 M	100 B	10 B	1 B	100 M	10 M	1 M
1																									
2																									
3																									
4																									
5																									
Total																									

Q1-3) **(To be responded by organizations with dedicated design departments and designers)**

How many employees are part of the dedicated design department? How many of them are designers? **If there is no dedicated design department but only designers, then write only the number of designers.**

No	Name of dedicated design departments	Total number of employees in the dedicated design department			Number of designers		
		Male	Female	Total	Male	Female	Total
1		persons	persons	persons	persons	persons	persons
2		persons	persons	persons	persons	persons	persons
3		persons	persons	persons	persons	persons	persons
4		persons	persons	persons	persons	persons	persons
5		persons	persons	persons	persons	persons	persons
Total		persons	persons	persons	persons	persons	persons

Q1-4) **(To be responded by organizations without dedicated design departments and designers)**

Please write the department mostly in charge of **design business at your organization.**

Bureau/Office/Headquarters	Division	Department	Team

Q1-5) **(To be responded by organizations without dedicated design departments and designers)**

Please indicate your organization's **2022 budget execution amount.**

Design support budget (including affiliated organization budgets)						Design service costs						Total labor costs of designers (*If your company does not have designers, please leave this section blank)						Labor costs paid to non-employed personnel, such as freelancers, mock-up production costs, printing costs					
100 B	10 B	1 B	100 M	10 M	1 M	100 B	10 B	1 B	100 M	10 M	1 M	100 B	10 B	1 B	100 M	10 M	1 M	100 B	10 B	1 B	100 M	10 M	1 M

■ The following questions apply to all.

Q2) Please indicate the proportion of services directly ordered by your organization through agencies affiliated with the ministry and others when executing design-related budgets.

Ordered directly by organization	Through an agency	Other( )	Total
%	%	%	**100%**

Q3) Please specify the proportion of orders placed separately from the design business sector, distinct from design and construction. Indicate the **proportion of orders that encompass the design business** when your organization orders a project that includes design.

Separate orders	Included orders	Total
%	%	**100%**

Q4) What is the impact of your organization's design investment in 2022?

① Budget increase
② Creation of designer jobs
③ Improvement and innovation of organizational culture
④ Enhanced image of organization
⑤ Increased customer satisfaction
⑥ Other( )

Q5) What are your organization's **areas of design use** in 2022? Please **select three in order.**

1st:_____, 2nd:_____, 3rd:_____

Stages of use		Areas of use		
Policy establishment		①	Establishing policies to provide participation methods and cooperation opportunities to expand consumer (public) participation (Developing public policies and services by observing and analyzing public demand)	
		②	Developing mid-term to long-term roadmap for building a city's image, such as a design (landscape) master plan, and city master plan.	
Policy enforcement	Space and facilities	③	Urban infrastructure	Parks, playgrounds, sidewalks, parking lots, tunnels, bridges, rivers, industrial parks, etc.
		④	Architecture and indoor environments	Government buildings, cultural sites, gyms, libraries, museums, airports, labs, etc.
		⑤	Pedestrian and transportation facilities	Pedestrian signals, overpasses, bus stops, traffic barriers, parking lots, etc.
		⑥	Convenience facilities	Benches, shelters, outdoor tables, trash cans, drinking fountains, restrooms, etc.
		⑦	Management facilities	Manholes, utility poles, streetlights, vents, etc.
		⑧	Information facilities	Local/tourist information facilities, traffic signs, municipal boundary stones, thermometers, etc.
		⑨	Administrative facilities	Unmanned kiosks, furniture, stationery, uniforms, etc.
		⑩	Public goods	Fire hydrants, crime prevention devices, etc.
	Image and public services	⑪	Signage	Traffic signs, billboards, bus maps, directional signs, regulatory signs, etc.
		⑫	Exhibits	Exhibitions, brochures, promotional materials, etc.
		⑬	Digital media	Websites, ERP, digital design, APP, online platforms, etc.
		⑭	Symbolic media	Public symbol systems, transportation cards, commemorative coins, stamps, characters, etc.
		⑮	Environment creation	Murals, media art, artwork, supergraphics, etc.
		⑯	City master plan	Developing mid-term to long-term design roadmap for building city-specific imagery, etc.
		⑰	Public administration services	Community activation, cultural arts programs, citizen design groups, etc.
		⑱	Healthcare services	Epidemic prevention, quarantine rules, dementia prevention, public health welfare, health information, etc.
		⑲	Education services	Organizational competency training, merchant training, ceramic/craft training, art/design thinking training, etc.
		⑳	Pedestrian and safety services	Crime prevention, CPTED (alleyway safety services, etc.), shelter creation, safety sign design, etc.
		㉑	Social and humans services	Pregnancy, childbirth, parenting, welfare, strengthening the competitiveness of the unemployed, etc.
		㉒	Environmental and Energy Services	Saving energy, inducing consumption behavior, creating a saving environment, recycling, installing solar power, etc.
Policy evaluation		㉓	Developing system for reviewing and evaluating development results	
Policy promotion		㉔	Using design to promote and disseminate policy outcomes	
Policy feedback		㉕	Utilizing design across policy implementation, evaluation, etc. (policymakers understand and use design)	
Other		㉖	( )	

Q6) **At what stage of policy** does your organization currently use **design**?
Please **select all** that apply.

① Policy establishment ② Policy enforcement ③ Policy evaluation
④ Policy promotion ⑤ Policy feedback ⑥ Unutilized

Q7) What factors do your organization c**onsider when selecting** a design-related **outsourcing company/expert?**
Please select **two responses in order.** **1st:_____, 2nd :_____**

① Registration as an industrial design company
② Major businesses
③ Service cost
④ Business size
⑤ Enterprise portfolio
⑥ Expert recommendations
⑦ Expertise of participating workforce
⑧ Service provider reputation and brand awareness
⑨ Quality of proposal
⑩ Awards history
⑪ Other ( )

Q8) The Ministry of Trade, Industry and Energy has notified that for establishing the consideration standard for industrial design development, when a national organization enters into a contract for the development of an industrial design, the consideration must be calculated in accordance with the “Criteria for Payment for Industrial Design Development.”
Please select the extent to which your organization utilizes the “Criteria for Payment for Industrial Design Development.”

① It is not being utilized. ⇒ To Q8-1
② It is only utilized when requested. ⇒ To Q8-1
③ Only the labor cost part is utilized. ⇒ End survey
④ It is actively being utilized. ⇒ End survey

Q8-1) Why does your organization **not utilize** the “Criteria for Payment for Industrial Design Development”?

① It is not aware about the existence of the criteria for payment

② The content of the criteria for payment or the system is difficult to use

③ The existing method is convenient, as the use of the criteria for payment is not mandatory

④ It is difficult to utilize because the calculated amount is low

⑤ Other ( )

♣ Thank you very much for your cooperation in the survey. ♣

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KOREA DESIGN INDUSTRY STATISTICS 2023

2022년 기준 영문 보고서

2023 디자인산업통계

Ministry of Trade, Industry and Energy

KOREA INSTITUTE OF DESIGN PROMOTION