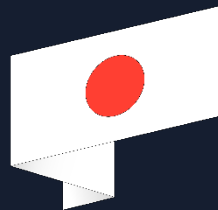
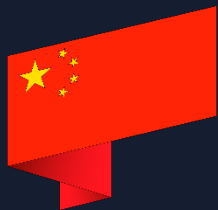


K | D | S

Employment Statistics & Development

ASIAN REPORT



Konzepthaus Design Study

Konzepthaus Design Study (KDS)

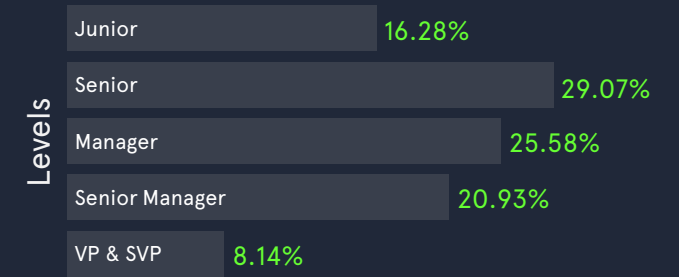
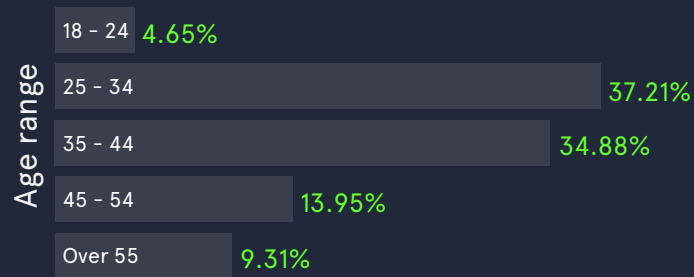
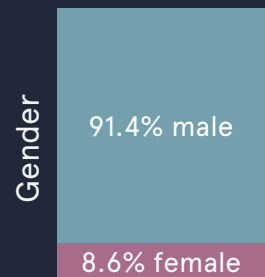
The goal of the KDS is to create the most comprehensive, empirical overview of mobility design departments. The results are aimed to support OEMs and suppliers alike to prepare their departments for the challenges of the coming years.

Employment Statistics & Development

The KDS #1 focuses on the research field of "Employment Statistics & Development" and is divided into four chapters – salary, creative work and personal training. The data was collected in a three-week period via an anonymous online survey and can be regarded as representative and resilient, because more than 84 persons participated. In the following, the key findings are highlighted and have been evaluated by the experts at KIC. The focus of the report is on Asia (China, Japan and South Korea).

Facts & Figures

86
Participants



Asian average annual salary incl. bonus*

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer ☑ Working in China, Japan & South Korea

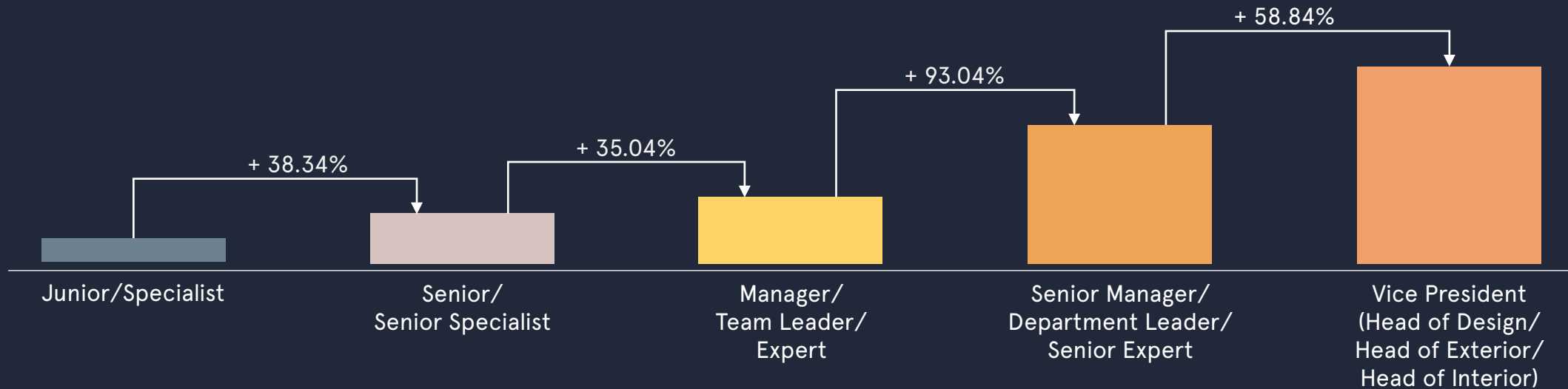


Martin Groschwald
(Managing Director)

„Within the Asian market, design is certainly a reputable profession and rewarded as such, through salary. The significant increase from Manager to Senior Manager can be explained by a larger number of expats or foreign staff holding these levels. However, overall salaries are very similar to their counterparts in the European or North American markets.“

Average salary increase when reaching the next hiring level

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer ☑ Working in China, Japan & South Korea



Martin Groschwald
(Managing Director)

„What jumps out at you on this chart, is the massive jump from Manager/Team Leader to Senior Manager/Department Leader. This can be explained with two general observations. The Asian market, in particular China, often uses the term manager for job descriptions, even at lower levels but doesn't represent the same supervisory role as in Europe or North America. On the Senior Manager level, we have observed a strong increase in non-local staff being hired to support design operations. This requires larger salaries to incentivise relocation.“

Salary comparison between car manufacturers

Design department Full time employee and temporary employment Automotive manufacturer Working in China, Japan & South Korea

Start up car manufacturers (founded after 2010) pay

0.84%

higher salaries than established manufacturers



Martin Groschwald
(Managing Director)

„I am very certain that if we surveyed people 5 years ago, this number would have been very different. The gap between start-ups and established companies would have been closer to 20-25%. However, due to large growth in the Asian design market over the past 5 years, established companies have had to address this gap to attract their share of the best talent. A concentration in the locations of studios such as Shanghai, Tokyo and Seoul have also caused an increase in competition that leads to a smaller gap.“

Gender distribution

Design department Full time employee and temporary employment Automotive manufacturer Working in China, Japan & South Korea

Gender distribution on the level without leadership responsibility*



Gender distribution on the first and second management level**



* Junior & Specialist
** Manager, Team Lead, Senior Manager

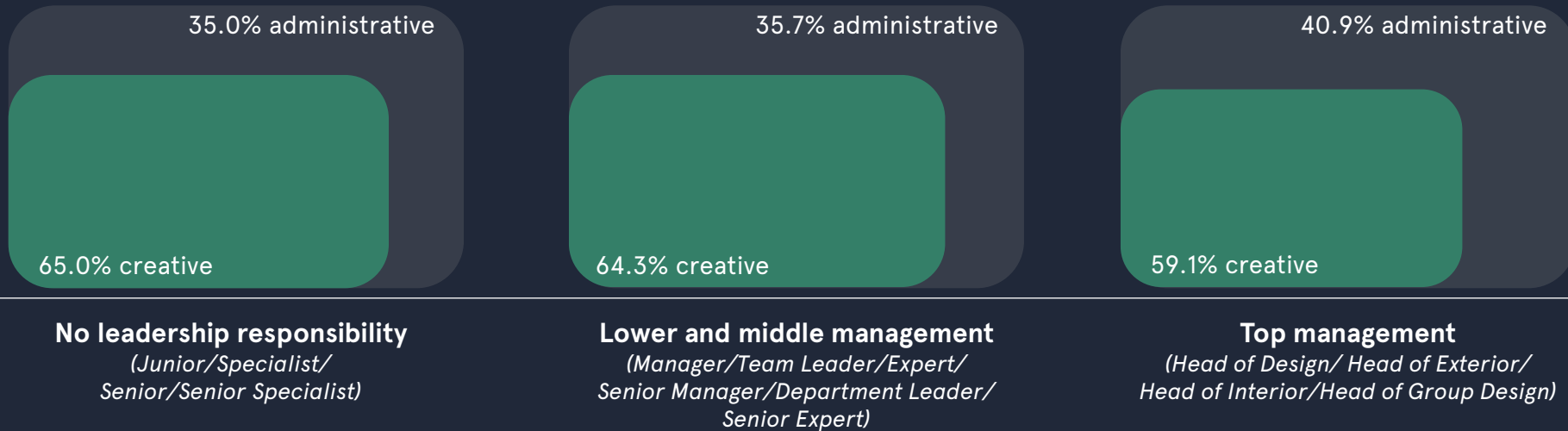


Florian Teufel
(Associate)

„Our analysis points to a very low representation of women within design departments for the Asian automotive industry, 8%. All respondents either held roles without leadership responsibility or lower levels of management. No respondents were employed in middle or senior management roles. These results are considered valid when compared with other industry benchmark reports showing the average proportion of women in the automotive industry at 13.8%. With such low representation, a true comparison of salaries by gender was not feasible. This all points to the pressing topic of how to get better gender representation within design departments on a global basis.“

Percentage of time spent on administrative vs creative work

☑ Design department ☑ Full time employee and temporary employment ☑ Automotive manufacturer ☑ Working in China, Japan & South Korea



Oliver Vogt
(Partner)

„The result is one of the biggest deviations from US and Europe. In Asia even high managers have to invest most of their time to be actively involved in the daily creative process. For some it seems to be difficult to delegate this work to their first-line managers, some are obliged by their superiors to contribute personally to the design.

So what happens to all the others tasks, like managing the own direct reports or representing design to internal and external stakeholders?“

Average annual training budget*

Design department Full time employee and temporary employment Automotive manufacturer Working in China, Japan & South Korea

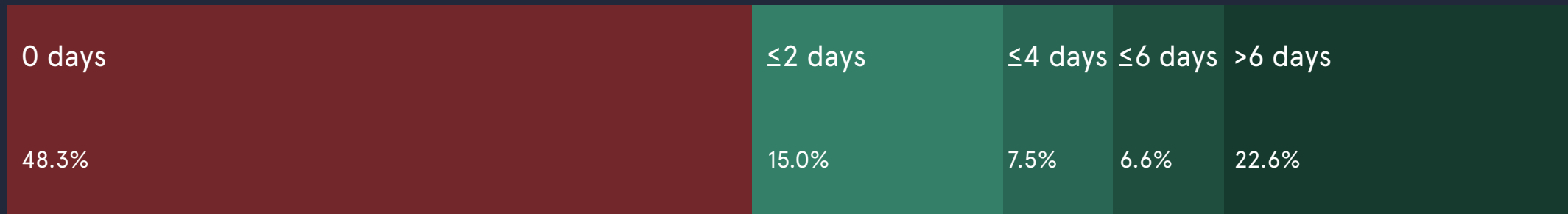


Oliver Vogt
(Partner)

„We can see a typical exponential growth of training budgets over the management levels. However Asian OEMs spend a little less to upskill their teams as in other regions. One reason might be that teams are in average a bit younger and managers might not see such a high need to train their people.“

Annual available training days

Design department Full time employee and temporary employment Automotive manufacturer Working in China, Japan & South Korea



Oliver Vogt
(Partner)

„Almost half of all participants in this study do not receive any training. It is a shame that some companies are not willing to invest in their staff. Designers that receive training are not only more productive, resulting in better economic output, but they are also more satisfied with their employer. From a management perspective, it is a smart move to offer training in place of a pay rise if currently not possible.“

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

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

Alias



Blender



Maya



Asaf Yaacobi
(Academy Director)

„Our report shows that traditional tools such as Alias are still common, ignoring newer tools or processes, such as poly-modelling which can help digitalize work processes and future-proof design departments. However, there is a growing awareness and a keen desire to upskill to newer 3D applications like Blender and Maya, which are currently at very low levels of adoption.

I predict a strong transitioning point towards digitalisation, versatility and diversity, with enormous upskilling potential, not only for a cost-saving workflow using digital tools but also, faster data communication and multi-users team-based processes.“

The Konzepthaus Design Study in 2021



Leadership & Organisation

(April 2021)



Digitalisation & Design

(July 2021)

Your KDS Team



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