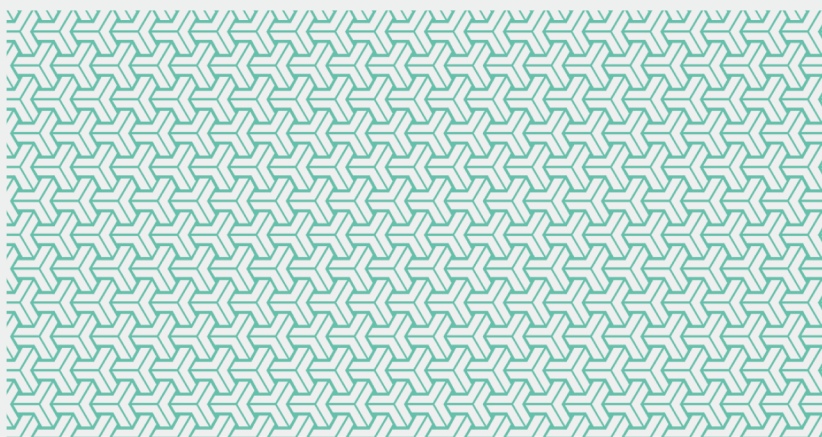# 건축서비스산업 실태조사 고도화 및 통계 활용방안 연구

Improving the Building Service Industry Survey and the use of
architectural service sector statistics

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The Building Service Industry Survey, the first national survey of the architectural service sector following Article 7 of the Act on the Promotion of Building Service Industry, was conducted in 2022. The Survey not only enables a comprehensive understanding of the architectural service sector but is the basis for building a reliable information system regarding the industry. Nonetheless, to ensure the wide use of the Survey as a source of data that accurately depicts the current industry status, the sampling method, survey contents, and items need to be reviewed. Such quality improvement should be appraised in the broader context of the current issues related to establishing and operating the building service industry information system. Against this background, this study aims to identify the pending issues regarding the building service information system and present the general direction and tasks that need to be pursued to advance both the information system and the Building Service Industry Survey.

The terms used in this study are clarified thus. First, 'architectural service sector statistics' is a general term covering industry, employee, and official statistics including the Building Service Industry Survey. The 'building service information system' indicates the system that collates, provides, and helps produce secondary statistical analysis of the architectural service sector statistics. The scope of this study is as follows. The study synthesizes the current issues of architectural service sector statistics in terms of its institutional aspect and probes issues raised in the process of implementing the Building Service Industry Survey, further substantiated through the Delphi method. The study also investigates and analyzes architectural service industry-related statistics from Korea and abroad. Based on this, the study proposes implementation tasks for establishing and advancing architectural service sector statistics and the Building Service Industry Survey.

Chapter 2 examined the current impediments in advancing architectural service industry statistics from an institutional aspect based on the Act on the Promotion of Building Service Industry. First, because the scope of the architectural service industry includes both buildings and spatial environments according to the Act, the industry classification code for the Building Service Industry Survey may need to be revised. Second, a detailed operation plan needs to be drawn up in relation to Article 8 of the Act, which should include how to collate industry-related information that is currently being produced and managed by various entities including the Architects Registration Board. In this process, the contents of statistics that can be linked to produce secondary

statistical analysis should also be examined. Third, a cooperation system needs to be established between entities that produce and manage architectural service sector-related information. Regarding this, a detailed operation plan of the Architecture HUB – the current building service information system managed by the Ministry of Land, Infrastructure and Transport – needs to be developed.

Chapter 2 also reviewed and prioritized the current issues of the architectural service sector statistics using the Delphi method. The study confirmed that architectural service sector statistics are needed as a basis for developing industrial policies and therefore should ensure reliability as a source for rational decision-making. Experts recognized the importance of maintaining stable conditions for producing and developing architecture service sector statistics. Improvement measures specific to the Building Service Industry Survey included further supplementing survey items that better depict employees' conditions, and ensuring data openness.

In Chapter 3, Korean National Statistics cases were examined. The cases were categorized into statistics focusing on industry conditions and status, employee status, and in-depth industry analysis. The study examined the definition of survey target and industrial classification methods, the survey method, the survey table, and the statistical table. Examples of policy, research, and corporate use were also reviewed.

The findings are as follows. The study identified that the survey target and the scope of industry need to align with the purpose of the statistic, and in cases where the scope of industry is ambiguous, a systematic method for reclassifying survey targets is necessary. The study also found that existing surveys used complementary data-gathering methods to ensure data reliability. Content-wise, generally, statistics were divided into either surveying the overall industry status through gathering information on businesses, employees, and policy demands similar to the scope of the Building Service Industry Survey, or understanding business performance quantitatively, in many cases utilizing existing data. The study also found that survey items can be flexibly incorporated when external conditions need to be accounted for which may have a lasting impact on the industry, such as the recent pandemic. Finally, to improve the use of statistics, stakeholders should be able to actively provide and promote the use of raw data to widen the use among different institutions and the private sector.

In Chapter 4, the study examined overseas architectural service industry statistics. In this Chapter, the study reviewed statistics from the US, UK,

and Japan which are high-ranking countries in terms of architectural service industry sales. Key statistics produced by the central government, local government, public institutions, and private associations were examined. Similar to Chapter 3, the study categorized the cases into statistics focusing on industry status and employee status.

The findings are as follows. The US was considered an example where state government and private institutions were key players in producing architecture service sector statistics. The American Institute of Architects(AIA) aims to understand the working conditions of architects through surveying compensations, benefits, and scope of work, and survey results are divided into state-level outcomes, large cities, and small and medium-sized cities. Such statistics are used by the private sector in projecting business cycles and drawing up strategic plans. The UK produces DCMS industry estimates whereby the architecture sector forms a part of the creative industry. The study identified issues in defining the industry scope, similar to the Korean Building Service Industry Survey. While examining other statistics produced by professional associations and boards, the study found that the strength of the UK architectural service sector statistics lies in the wide-ranging types of statistics as both the public and the private sectors were active producers and users of industry statistics. Finally, Japan was identified as a case where the central government played an active role in producing architecture-related statistics. The Ministry of Land, Infrastructure, Transport, and Tourism conducts numerous surveys to understand the industry structure and employee status of the architectural service sector, and based on these surveys, the Ministry improves architect fees, defining the scope of work, and legislative systems.

In Chapter 5, the study set the following agendas for establishing comprehensive architectural service sector statistics. First, the target and scope of the architectural service industry need to be clarified. Second, methods for advancing and diversifying architectural service industry statistics need to be developed. Third, the wider use of architectural service industry statistics needs to be promoted. Based on this, the study proposed short-, mid-and long-term tasks.

As a short-term task, the Building Service Industry Survey needs to be improved upon. Reviewing and subdividing the survey target based on business size can be considered and it is also important to reconsider the sampling design of the Survey to properly reflect the regional distribution of architectural service

sector businesses. The survey method can also be differentiated according to the subdividing of the survey targets, in particular, for large-scale businesses. The survey cycle may also be re-considered depending on whether statistics are needed for business cycles and forecasts or understanding the working conditions of individual firms and employees.

Mid-term tasks should be set to expand the target of the architectural service industry and diversify statistical content. Special classification systems of National Statistics may be considered in specifying the detailed business fields and codes of the architectural service industry. New statistical content can be developed by first considering the coherence between existing data sets, and by linking data on employee status that will be made available through the Architects Registration Board with the Building Service Industry Survey. Furthermore, new statistics could be explored through diversifying data collection methods and developing indexes and other secondary in-depth analytical content.

In the long term, a stable foundation for establishing and developing architectural service sector statistics is required. To promote the use of industry statistics, data accessibility needs to be improved so that various users from the private and public sectors may use the data according to their needs. In the future, a cooperation system that allows the efficient collection and processing of data between different entities should be developed, and to do so, the purpose and extent of the Building Service Industry Survey and its relation to the overall building service information system need to be clarified by amending Article 7 and 8 of the Act on the Promotion of Building Service Industry.

This study discussed the pending issues of establishing the architectural service industry statistics and how to advance and diversify current statistics to better understand the architectural service industry. The study revised the survey item of the current Building Service Industry Survey and proposed improvements that reflect the findings of the study. The mid-to-long-term strategies for building and operating an information system may be further developed to enable a stable environment for producing architectural service sector statistics.