



Preliminary Results of the 2021 Franchise Survey

■ In 2021, the number of franchise establishments was 260 thousand, rising by 10.6% from 2020. The total number of workers in franchise establishments was 834 thousand persons, rising by 4.0% from 2020. The number of workers per franchise establishment fell by 5.9% from 2020. The total annual sales of franchise establishments recorded 84.8 trillion won, rising by 14.2% from 2020. The annual sales per franchise establishment grew by 3.3% from 2020.

□ In 2021, the number of franchise establishments was 260 thousand, which increased by 10.6% (25 thousand establishments) from 2020. The number of workers recorded 834 thousand persons, which increased by 4.0% (32 thousand workers) from 2020. The total annual sales of franchise establishments recorded 84.8 trillion won, which grew by 14.2% (10.5 trillion won) from 2020.

○ (Number of franchise establishments)

'Convenience stores', 'Korean food restaurants' and 'Chicken restaurants' took up 45.5% of the total franchise establishments.

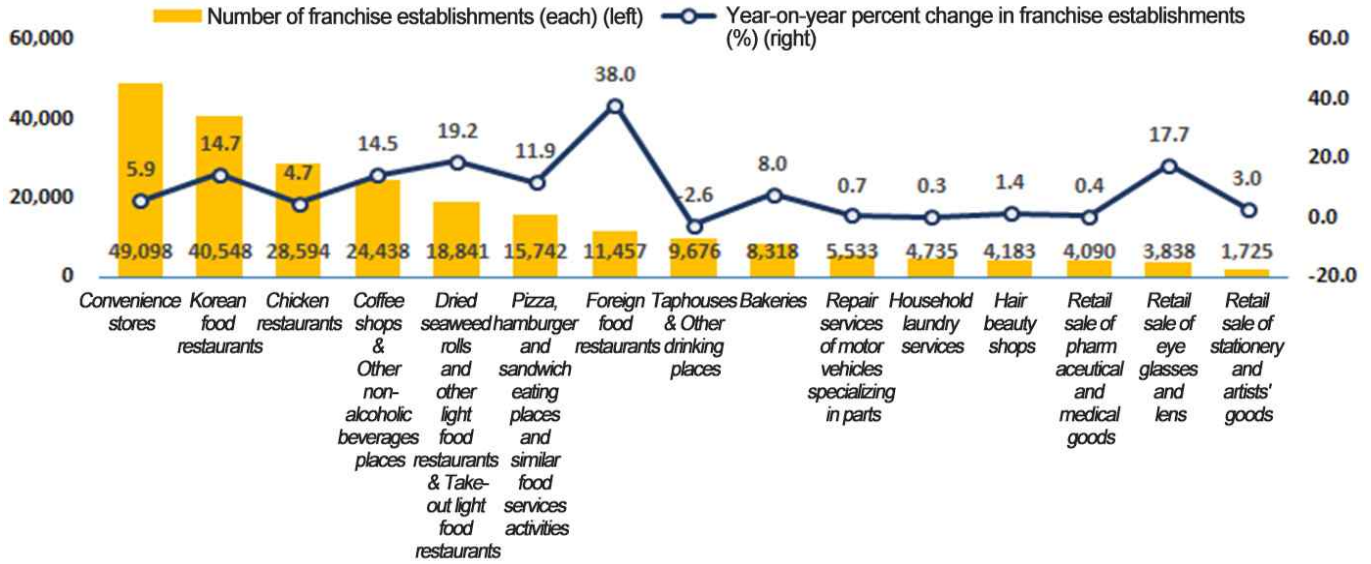
- Compared to 2020, most of the industries including 'Foreign food restaurants' (38.0%), 'Dried seaweed rolls and other light food restaurants & Take-out light food restaurants' (19.2%), and 'Retail sale of eyeglasses and lens' (17.7%) recorded an increase in franchise establishments. Whereas, 'Taphouses & Other drinking places' (-2.6%) recorded a decrease in franchise establishments.

< Number of franchise establishments by industry >

(Unit: each, %)

By industry	2020	2021	Compo- sition	Change from	
				the previous year	Percent change
Total	234,872	259,662	100.0	24,790	10.6
Convenience stores	46,364	49,098	18.9	2,734	5.9
Retail sale of stationery and artists' goods	1,674	1,725	0.7	51	3.0
Retail sale of pharmaceutical and medical goods	4,072	4,090	1.6	18	0.4
Retail sale of eyeglasses and lens	3,260	3,838	1.5	578	17.7
Korean food restaurants	35,349	40,548	15.6	5,199	14.7
Foreign food restaurants	8,300	11,457	4.4	3,157	38.0
Bakeries	7,701	8,318	3.2	617	8.0
Pizza, hamburger and sandwich eating places and similar food services activities	14,072	15,742	6.1	1,670	11.9
Chicken restaurants	27,303	28,594	11.0	1,291	4.7
Dried seaweed rolls and other light food restaurants & Take-out light food restaurants	15,812	18,841	7.3	3,029	19.2
Taphouses & Other drinking places	9,937	9,676	3.7	-261	-2.6
Coffee shops & Other non-alcoholic beverages places	21,342	24,438	9.4	3,096	14.5
Repair services of motor vehicles specializing in parts	5,494	5,533	2.1	39	0.7
Hair beauty shops	4,126	4,183	1.6	57	1.4
Household laundry services	4,720	4,735	1.8	15	0.3
Others	25,346	28,846	11.1	3,500	13.8

< Number of franchise establishments and percent change by industry >



○ (Number of workers)

'Convenience stores', 'Korean food restaurants' and 'Coffee shops & Other non-alcoholic beverage places' occupied 47.6% of the total workers in franchise establishments.

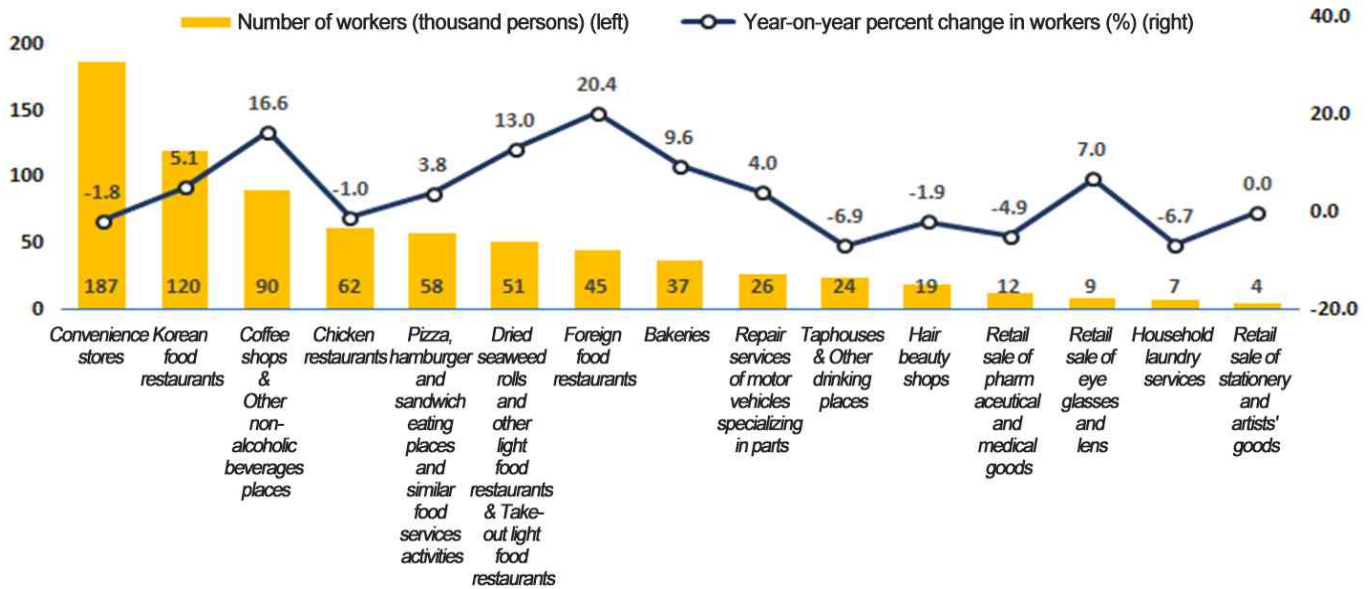
- Compared to 2020, 'Foreign food restaurants', 'Coffee shops & Other non-alcoholic beverage places' and 'Dried seaweed rolls and other light food restaurants & Take-out light food restaurant' grew by 20.4%, 16.6% and 13.0%, respectively. 'Taphouses & Other drinking places' and 'Household laundry services' fell by 6.9% and 6.7%, respectively.

< Number of workers by industry >

(Unit: person, %)

By industry	2020	2021	Compo- sition	Change from the previous year	
				Change from the previous year	Percent change
Total	802,418	834,290	100.0	31,872	4.0
Convenience stores	190,149	186,776	22.4	-3,373	-1.8
Retail sale of stationery and artists' goods	4,378	4,377	0.5	-1	0.0
Retail sale of pharmaceutical and medical goods	12,873	12,239	1.5	-634	-4.9
Retail sale of eyeglasses and lens	8,566	9,162	1.1	596	7.0
Korean food restaurants	113,788	119,586	14.3	5,798	5.1
Foreign food restaurants	37,068	44,626	5.3	7,558	20.4
Bakeries	33,604	36,818	4.4	3,214	9.6
Pizza, hamburger and sandwich eating places and similar food services activities	55,946	58,085	7.0	2,139	3.8
Chicken restaurants	62,502	61,878	7.4	-624	-1.0
Dried seaweed rolls and other light food restaurants & Take-out light food restaurants	45,411	51,304	6.1	5,893	13.0
Taphouses & Other drinking places	25,387	23,632	2.8	-1,755	-6.9
Coffee shops & Other non-alcoholic beverages places	77,589	90,440	10.8	12,851	16.6
Repair services of motor vehicles specializing in parts	24,758	25,757	3.1	999	4.0
Hair beauty shops	19,790	19,411	2.3	-379	-1.9
Household laundry services	7,013	6,542	0.8	-471	-6.7
Others	83,596	83,657	10.0	61	0.1

< Number of workers and percent change by industry >



○ (Annual sales)

'Convenience stores', 'Korean food restaurants' and 'Chicken restaurants' accounted for 49.3% of the total annual sales of franchise establishments.

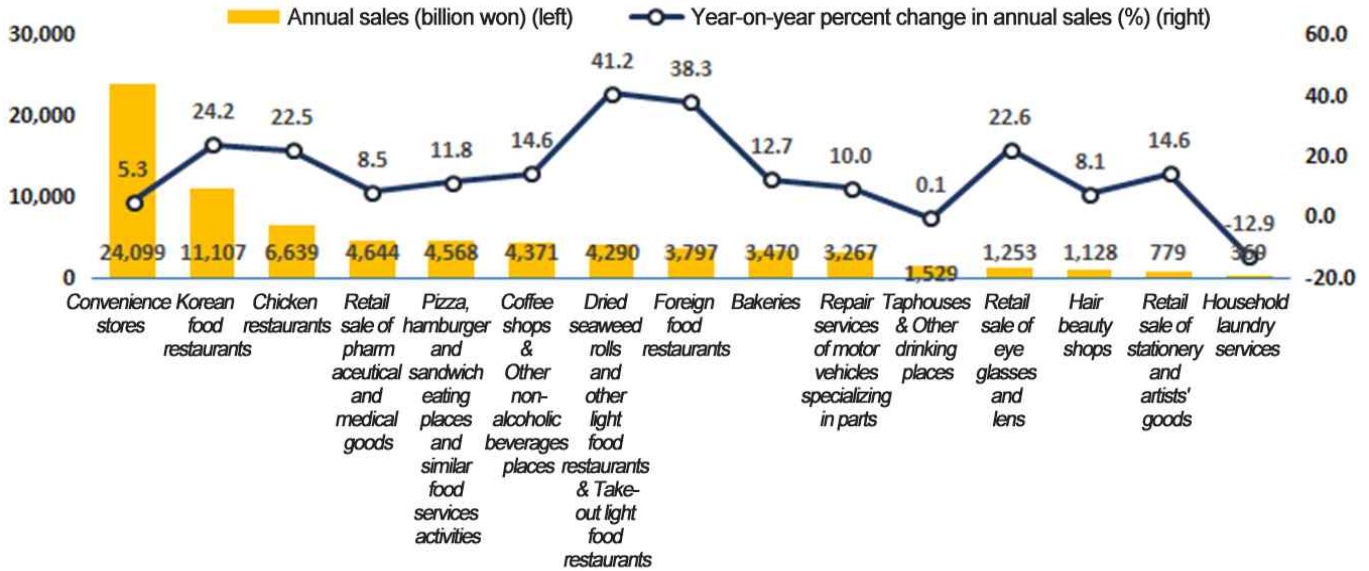
- Compared to 2020, most of the industries including 'Dried seaweed rolls and other light food restaurants & Take-out light food restaurants' (41.2%), 'Foreign food restaurants' (38.3%) and 'Korean food restaurants' (24.2%) marked an increase in annual sales. Whereas, 'Household laundry services' (-12.9%) marked a decrease in annual sales.

< Annual sales by industry >

(Unit: billion won, %)

By industry	2020	2021	Compo- sition	Change from the previous year	
				Change from the previous year	Percent change
Total	74,260	84,802	100.0	10,542	14.2
Convenience stores	22,879	24,099	28.4	1,220	5.3
Retail sale of stationery and artists' goods	680	779	0.9	99	14.6
Retail sale of pharmaceutical and medical goods	4,281	4,644	5.5	363	8.5
Retail sale of eyeglasses and lens	1,022	1,253	1.5	231	22.6
Korean food restaurants	8,940	11,107	13.1	2,167	24.2
Foreign food restaurants	2,745	3,797	4.5	1,052	38.3
Bakeries	3,079	3,470	4.1	390	12.7
Pizza, hamburger and sandwich eating places and similar food services activities	4,087	4,568	5.4	481	11.8
Chicken restaurants	5,421	6,639	7.8	1,218	22.5
Dried seaweed rolls and other light food restaurants & Take-out light food restaurants	3,039	4,290	5.1	1,251	41.2
Taphouses & Other drinking places	1,528	1,529	1.8	2	0.1
Coffee shops & Other non-alcoholic beverages places	3,815	4,371	5.2	556	14.6
Repair services of motor vehicles specializing in parts	2,970	3,267	3.9	297	10.0
Hair beauty shops	1,043	1,128	1.3	85	8.1
Household laundry services	424	369	0.4	-55	-12.9
Others	8,307	9,491	11.2	1,184	14.3

< Annual sales and percent change by industry >



□ In 2021, the number of workers per franchise establishment stood at 3.2 persons, which fell by 5.9% from 2020. The annual sales per franchise establishment recorded 326.60 million won, which grew by 3.3% from 2020.

○ (Number of workers per franchise establishment)

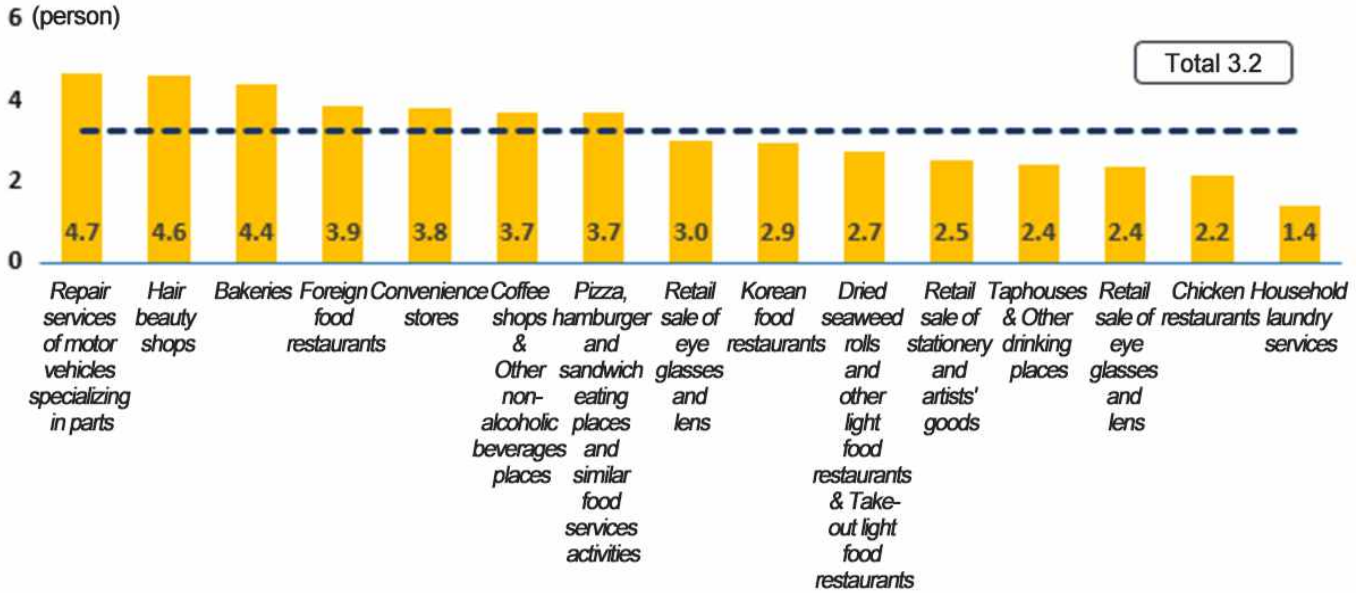
'Foreign food restaurants', 'Korean food restaurants' and 'Retail sale of eyeglasses and lens' declined by 13.3%, 9.4% and 7.7%, respectively. 'Repair services of motor vehicles specializing in parts' and 'Coffee shops & Other non-alcoholic beverage places' grew by 4.4% and 2.8%, respectively.

< Number of workers per franchise establishment by industry >

(Unit: person, %)

By industry	2020	2021	Change from the previous year	Percent change
Total	3.4	3.2	-0.2	-5.9
Convenience stores	4.1	3.8	-0.3	-7.3
Retail sale of stationery and artists' goods	2.6	2.5	-0.1	-3.8
Retail sale of pharmaceutical and medical goods	3.2	3.0	-0.2	-6.3
Retail sale of eyeglasses and lens	2.6	2.4	-0.2	-7.7
Korean food restaurants	3.2	2.9	-0.3	-9.4
Foreign food restaurants	4.5	3.9	-0.6	-13.3
Bakeries	4.4	4.4	0.0	0.0
Pizza, hamburger and sandwich eating places and similar food services activities	4.0	3.7	-0.3	-7.5
Chicken restaurants	2.3	2.2	-0.1	-4.3
Dried seaweed rolls and other light food restaurants & Take-out light food restaurants	2.9	2.7	-0.2	-6.9
Taphouses & Other drinking places	2.6	2.4	-0.2	-7.7
Coffee shops & Other non-alcoholic beverage places	3.6	3.7	0.1	2.8
Repair services of motor vehicles specializing in parts	4.5	4.7	0.2	4.4
Hair beauty shops	4.8	4.6	-0.2	-4.2
Household laundry services	1.5	1.4	-0.1	-6.7
Others	3.3	2.9	-0.4	-12.1

< Number of workers per franchise establishment by industry >



○ (Annual sales per franchise establishment)

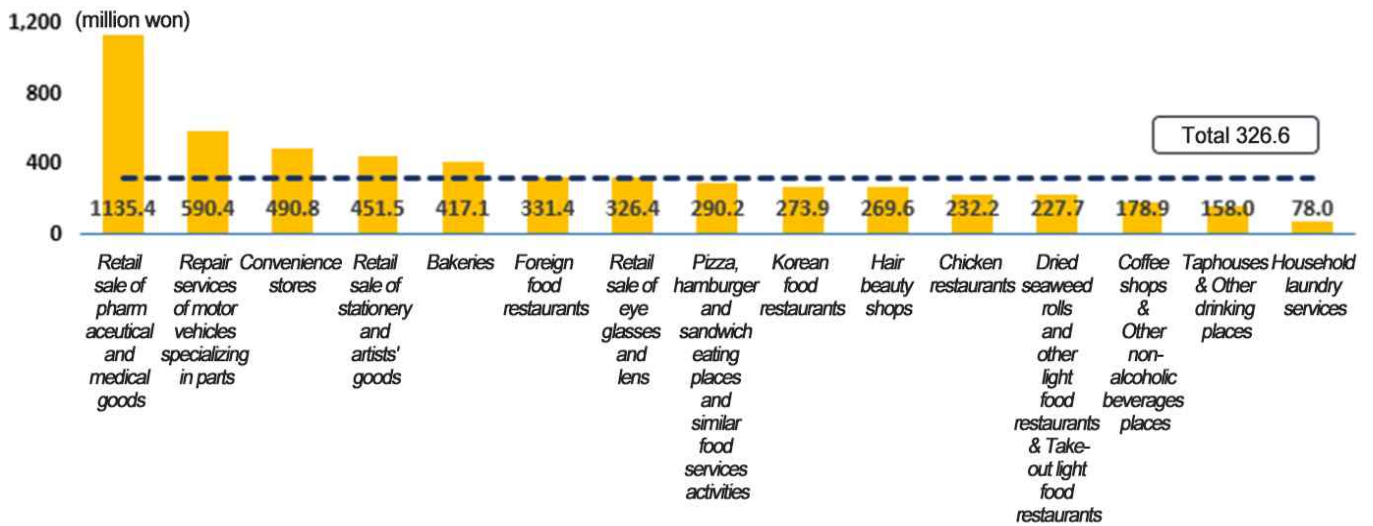
Compared to 2020, 'Dried seaweed rolls and other light food restaurants & Take-out light food restaurants', 'Chicken restaurants' and 'Retail sale of stationery and artists' goods' grew by 18.5%, 16.9% and 11.2%, respectively. Whereas, 'Household laundry services', 'Convenience stores' and 'Pizza, hamburger and sandwich eating places and similar food services activities' dropped by 13.2%, 0.5% and 0.1%, respectively.

< Annual sales per franchise establishment by industry >

(Unit: million won, %)

By industry	2020	2021	Change from the previous year	
			Change from the previous year	Percent change
Total	316.2	326.6	10.4	3.3
Convenience stores	493.5	490.8	-2.7	-0.5
Retail sale of stationery and artists' goods	406.1	451.5	45.4	11.2
Retail sale of pharmaceutical and medical goods	1,051.3	1,135.4	84.1	8.0
Retail sale of eyeglasses and lens	313.4	326.4	13.0	4.1
Korean food restaurants	252.9	273.9	21.0	8.3
Foreign food restaurants	330.8	331.4	0.6	0.2
Bakeries	399.8	417.1	17.3	4.3
Pizza, hamburger and sandwich eating places and similar food services activities	290.5	290.2	-0.3	-0.1
Chicken restaurants	198.6	232.2	33.6	16.9
Dried seaweed rolls and other light food restaurants & Take-out light food restaurants	192.2	227.7	35.5	18.5
Taphouses & Other drinking places	153.7	158.0	4.3	2.8
Coffee shops & Other non-alcoholic beverages places	178.8	178.9	0.1	0.1
Repair services of motor vehicles specializing in parts	540.6	590.4	49.8	9.2
Hair beauty shops	252.8	269.6	16.8	6.6
Household laundry services	89.9	78.0	-11.9	-13.2
Others	327.8	329.0	1.2	0.4

< Annual sales per franchise establishment by industry >



□ As for franchise establishments by region, Gyeonggi recorded the highest figure of 69 thousand establishments (26.4%).

< Major indicators of the franchising industry >

Classification	2020	2021	Change	
			Change	Percent change (%)
Number of franchise establishments (each)	234,872	259,662	24,790	10.6
Number of workers (person)	802,418	834,290	31,872	4.0
Number of workers per franchise establishment (person)	3.4	3.2	-0.2	-5.9
Annual sales (billion won)	74,260	84,802	10,542	14.2
Annual sales per franchise establishment (million won)	316.2	326.6	10.4	3.3