

Design Delivers



DESIGN DRIVES BUSINESS
COMPETITIVENESS

DESIGN DELIVERS CONTENTS

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DESIGN DRIVES BUSINESS COMPETITIVENESS IN AN UNCERTAIN WORLD

Across industries, companies are navigating increasing complexity. Geopolitical shifts, rapid technological developments, and evolving regulations are reshaping the conditions for innovation and competitiveness. In this environment, companies must continuously adapt while making decisions in situations where the full picture is rarely visible.

Design is increasingly recognised as a powerful capability for navigating this complexity – both to stay compliant and to grow. When applied strategically, design helps companies translate insights on user needs, customer requirements, and future trends into direction, align people and processes, and develop solutions that respond to market and regulatory demands.

This is reflected in *Design Delivers 2025*, a survey conducted by Megafon on behalf of Danish Design Center (DDC) and the Confederation of Danish Industry (DI). Based on responses from 600 private Danish companies with more than 10 employees, the study documents how design creates value in practice.

The evidence is clear: nine out of ten companies that use design report that it creates value. Companies highlight stronger competitiveness, increased sales, stronger brands, more user-friendly solutions, and a greater ability to differentiate in the market.

The survey also shows that many Danish companies already integrate design into core business activities. Today, 28% of companies use design as a central element of their strategy, while 33% integrate design directly into their development processes.

Across the survey, a clear pattern emerges: the more strategically design is integrated into a company's work, the greater the value companies report. Design is therefore far more than a final layer of form or aesthetics. When embedded in decision-making and development processes, it becomes a way of working that helps companies understand complexity, connect technology and human insight, and turn ambition into solutions that deliver real value.

Design Delivers 2025 provides new insight into how companies use design today and how it contributes to competitiveness. The ambition is to strengthen the evidence base for design as a strategic capability and inspire more companies to use design to create direction, resilience and long-term value.

THE DESIGN LADDER

The study's understanding and mapping of companies' use of design is based on The Design Ladder. The Design Ladder is a model developed to categorise different types of design use. Companies use design in different ways to support product development and innovation, aiming to strengthen competitiveness and align with overall business strategy. It is not simply a question of whether design is used, but how it is used.

The model consists of four steps that illustrate how companies can work with design. The higher a company moves up the ladder, the more deeply design is integrated into its strategy, culture, and ways of working. In short, the higher the step, the more design-intensive the company is. Historically, data has shown that the higher a company ranks on The Design Ladder – and thus the more integrated design is – the greater the value it creates.

1

STEP 01

Non-Design. Design is not used systematically. Fundamentally, design is invisible or non-existent in areas such as product development, and tasks do not involve trained designers.

2

STEP 02

Design as Styling. Design is used as a finishing touch or to shape the appearance of new products and services. In short, design is styling – the final element in the development process.

3

STEP 03

Design as Process. Design is an integrated part of development processes. Design is not a result but an approach, involved early in development. Solutions are driven by problem understanding and user needs. Design methods and trained designers are involved in product development or innovation from day one.

4

STEP 04

Design as Strategy. Design is a key element in the company's business model. Designers collaborate with top management (CEO and executive team) to further develop or rethink the business concept and model. Design is linked to the company's vision, market goals, and future role in value chains and value-creating systems.

BACKGROUND OF THE STUDY

Numbers matter. New numbers matter more.

In 2025, Danish Design Center (DDC) and the Confederation of Danish Industry (DI) launched a comprehensive business survey to map Danish companies' use of design and uncover the value they experience from it. This is the fourth joint survey on design use and value creation initiated by DDC and DI.

Danish competitiveness is essential for welfare and prosperity. Several studies, both in Denmark and internationally, confirm how design strengthens competitiveness and creates business value. Companies that integrate design methods and competencies into the core of their business – often without explicitly labelling it as design – experience it as valuable for financial performance and crucial for progress and sustainable innovation.

Yet design's potential for Danish competitiveness has not been fully realised. There are several reasons for this. One explanation is that the value of design remains insufficiently documented, that its impact is difficult to measure in isolation, and that previous documentation has been too fragmented. This must change. With Design Delivers and future analyses, the ambition is to generate the data, knowledge, and evidence that demonstrate the impact of design as a driver of competitiveness.

Design Delivers 2025 was conducted by Megafon for the Danish Design Center (DDC) and the Confederation of Danish Industry (DI). Creative Denmark is communications partner for the study.

HOW TO READ THE REPORT

HOW DESIGN IS DEFINED

In the survey, the 600 participating companies were presented with the following definition of design:

Design is understood in a broad sense. It often relates to the visual expression of a graphic, digital, or physical product, but it can also be a method for developing new types of services, systems, or business models.

Design encompasses the competencies, skills, and craftsmanship found in product design, service design, graphic design, digital design, and strategic design. It is also a mindset and a way of working with problem-solving and innovation, which is based on deep insights into the needs of people - users and consumers. Design is therefore a tool that helps companies understand their customers, develop new solutions, and adapt to market changes. It can strengthen competitiveness and support navigation through complex challenges related to the green transition, technological development, and new regulatory requirements.

HOW TO READ THE DATA

The survey data is based on responses from 600 Danish companies, which provides statistical reliability for the results obtained. Statistical reliability means that, with at least 95% certainty, patterns in the data are not random and can be generalised to Danish companies overall. When each question is considered independently, distributions are representative of Danish companies as a whole.

The report also includes cross-analyses. These are commented on both when statistically significant correlations appear and when an overall picture across defined segments is shown, even if certain cross-analyses do not fall within a 95% confidence interval. Results from cross-analyses, therefore, carry a higher degree of statistical uncertainty.

We hope you find the insights valuable.

THE USE OF DESIGN IN DANISH COMPANIES



Below is the distribution of Danish companies across The Design Ladder. The distribution reflects responses to the question: Which of the following statements best describes how design is used in your company?



20%

Step 1
Design is not something we work with systematically

02

18%

Step 2
Design is used as a final touch, styling, or visual form when we develop something new

03

33%

Step 3
Design is an integrated element in our processes when we develop something new

04

28%

Step 4
Design is a central and guiding element in our business strategy

DESIGN AS STRATEGY APPLIES TO COMPANIES OF ALL SIZES

Design is relevant regardless of company size. The chart shows how the 600 surveyed companies, measured by number of employees, are distributed across The Design Ladder.

The share of companies working with design as a strategy (Step 4) is almost evenly distributed across all company sizes. This indicates that a strategic use of design is not limited to large enterprises; it applies to small and medium-sized companies as well.

There is a higher concentration of large companies that use design as an integrated part of their development processes (Step 3), and only a small proportion of large companies do not use design at all (Step 1). This suggests that larger Danish companies are more likely to integrate design into core processes.

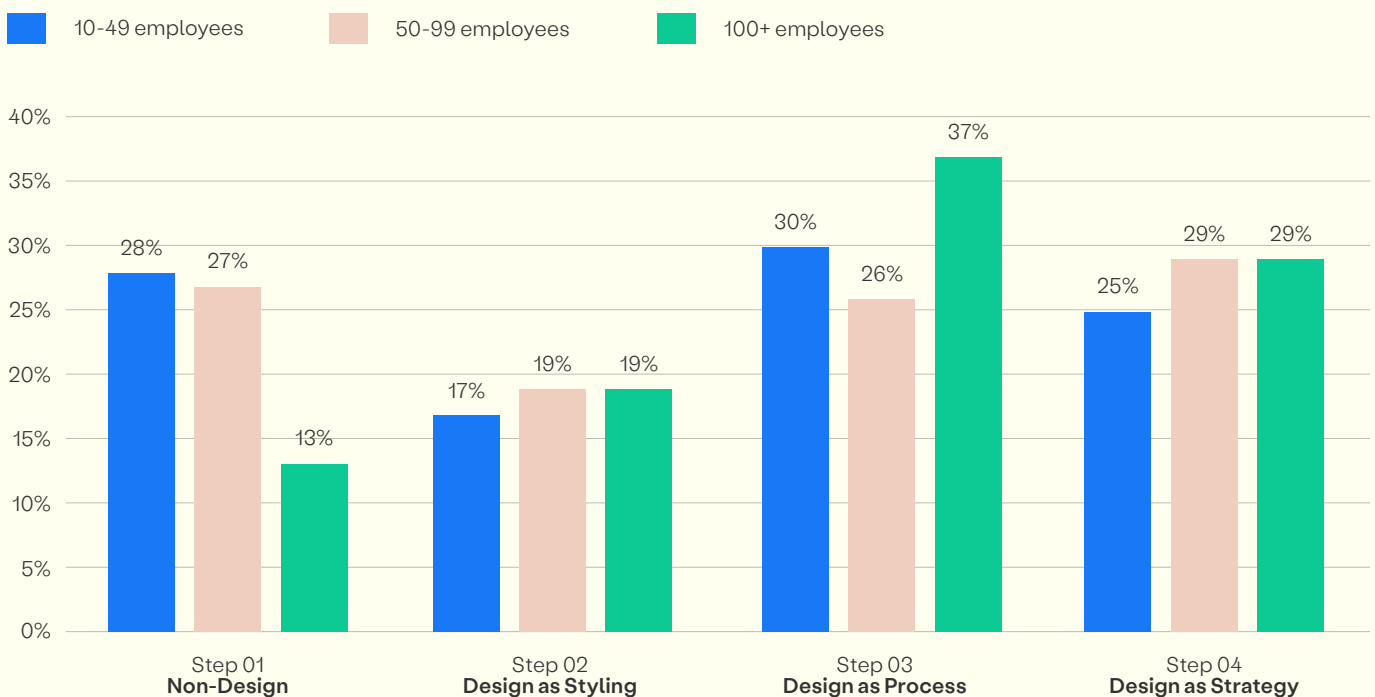


Diagram 01

The distribution shows the cross-analysis between the question on design use (The Design Ladder) and background information on the companies' size.

COMPANIES WITH THEIR OWN PRODUCTS RANK HIGHEST ON THE DESIGN LADDER

The chart shows how the 600 surveyed companies are positioned on The Design Ladder according to their primary business activity: service and consultancy companies, manufacturing companies with their own products, and manufacturing companies operating as subcontractors.

Manufacturing companies with their own products are, on average, positioned higher on The Design Ladder than manufacturing companies that act as subcontractors. This means that companies with their own products are more likely to use design as a process and as a strategy. The study therefore highlights a potential for subcontractors to apply design more strategically when developing solutions that respond to increasing demands from customers and partners.

Beyond this, the differences are not statistically significant, which indicates that design is relevant regardless of a company's business model or customer base. At the same time, the data shows no significant difference in design use between companies that operate primarily in B2B, B2C, or a combination of both.

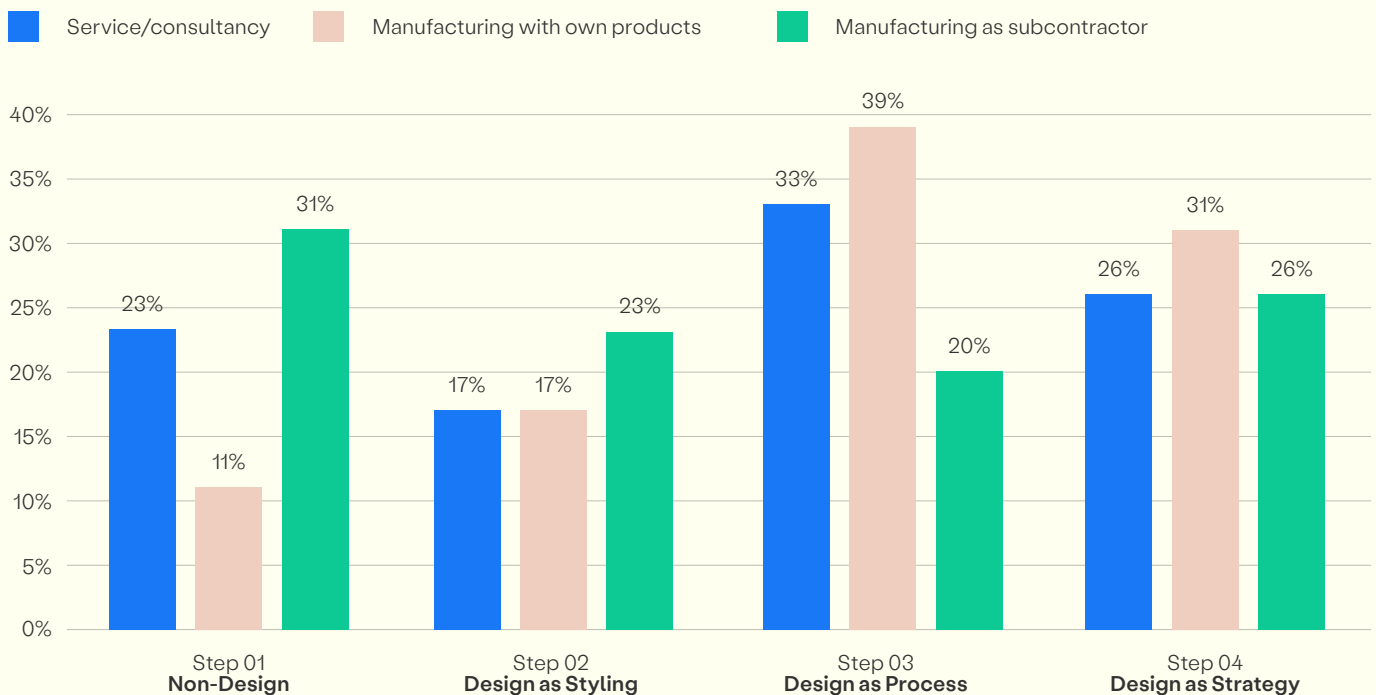


Diagram 02

The distribution shows the cross-analysis between the question on design use (The Design Ladder) and background information on the companies' primary business activity.

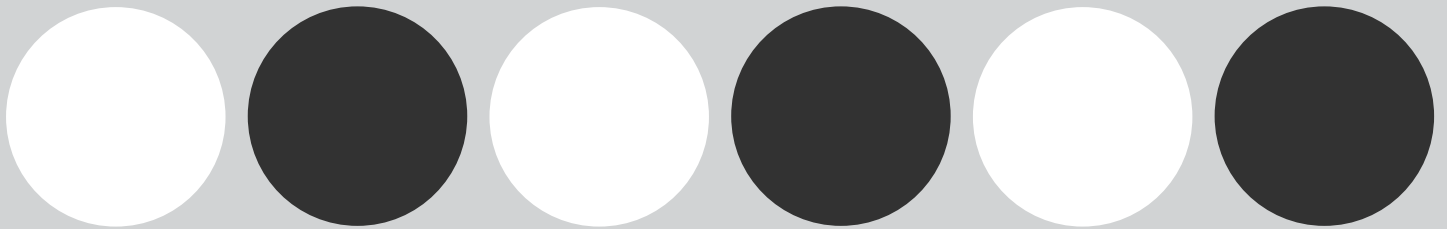
DESIGN PROVIDES ACCESS TO NEW MARKETS

Among several possible motivations, the surveyed companies highlight access to new markets and customers as a key reason for using design. 72% use design to gain access to new markets and customers.



COMPANIES ALSO USE DESIGN TO:

- * respond to new regulations (64%)
- * drive the green transition (59%)
- * respond to new technological opportunities (e.g., AI, robotics, welfare technology) (58%)
- * ensure sustainable production (48%)
- * create resilience in relation to global changes (43%)



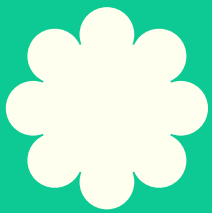
72% use design to gain access to new markets and customers

DANISH COMPANIES' PERCEPTION OF VALUE CREATED BY DESIGN

Design influences many parts of a company and affects performance across multiple areas. That makes the value of design difficult to isolate and measure on its own.

The data in this section is based solely on the respondents' assessments. Ideally, we would link the companies' position on The Design Ladder to financial baseline data such as revenue, exports, and employment. However, that approach carries too much uncertainty, including time lags between survey responses and when financial figures become available.

The findings, therefore, reflect how business leaders responsible for developing their companies assess design's impact on financial performance and competitiveness.

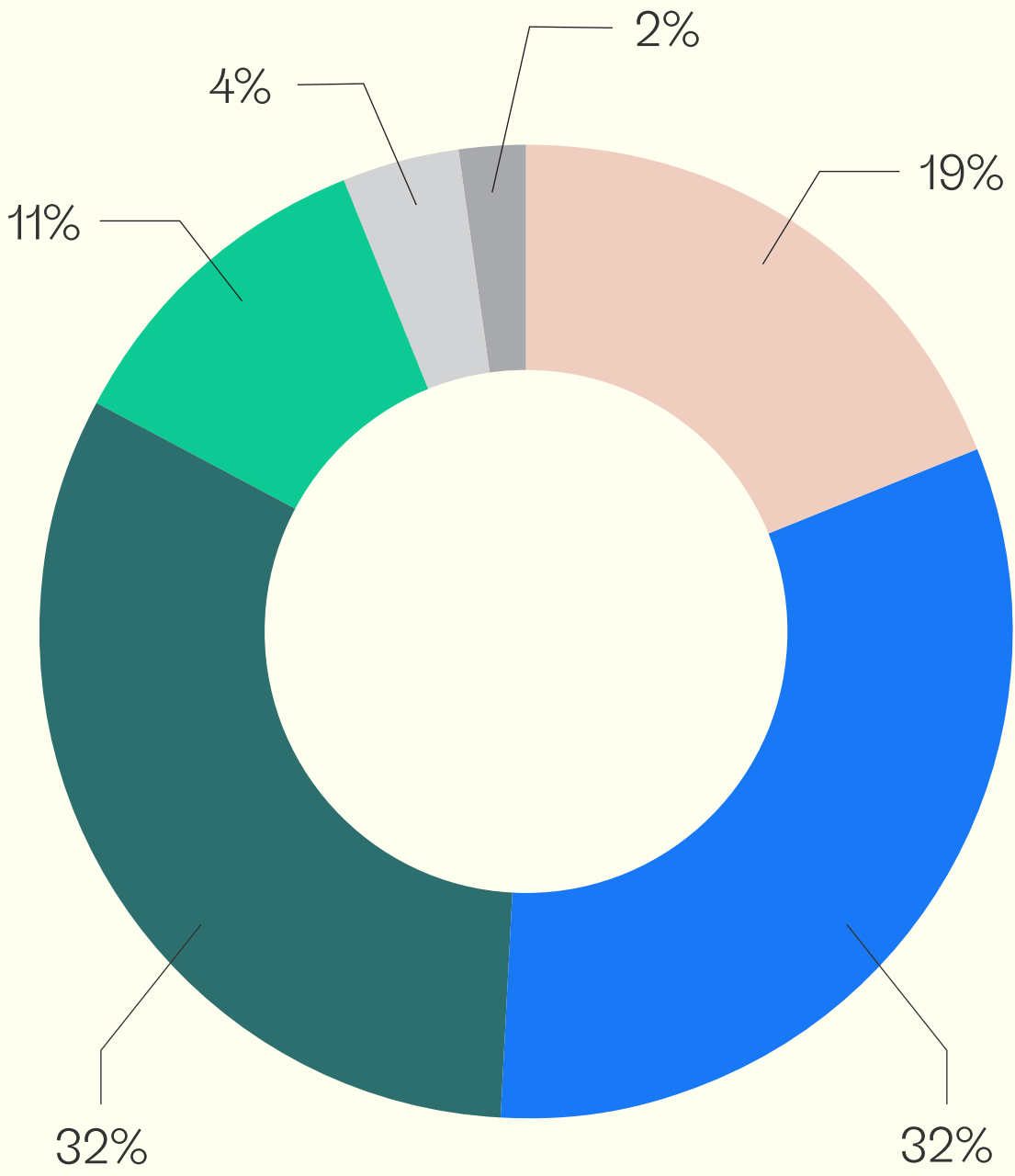


83% of all companies assess that design has a positive impact on their financial performance



Of these, 64% assess that design has a high or very high positive impact on financial performance.

DESIGN'S IMPACT ON FINANCIAL PERFORMANCE



- To a very high degree
- To a high degree
- To some degree
- To a lesser degree
- Not at all
- Don't know

Diagram 03
The distribution shows companies' responses to the question: To what extent do you assess that design has a positive impact on your company's financial performance?

STRATEGIC USE OF DESIGN DELIVERS THE STRONGEST FINANCIAL PERFORMANCE

The diagrams show how the 600 surveyed companies assess the positive impact of design on financial performance, distributed across the different steps of The Design Ladder. The higher companies are positioned on The Design Ladder, the greater the positive financial impact they report from design. The diagrams show a clear relationship between a company's position on The Design Ladder and its assessment of design as a source of economic value.

2

DESIGN AS STYLING

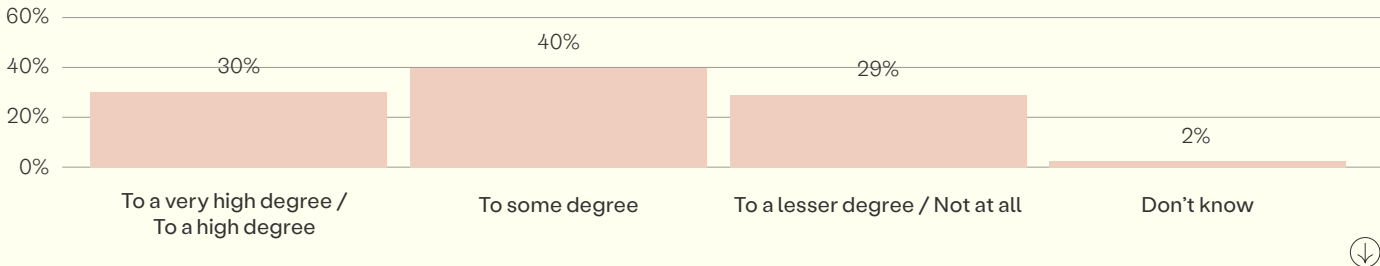


Diagram 04

The distribution shows the cross-analysis between Step 2 on The Design Ladder and companies' assessment of design's impact on financial performance.

3

DESIGN AS PROCESS

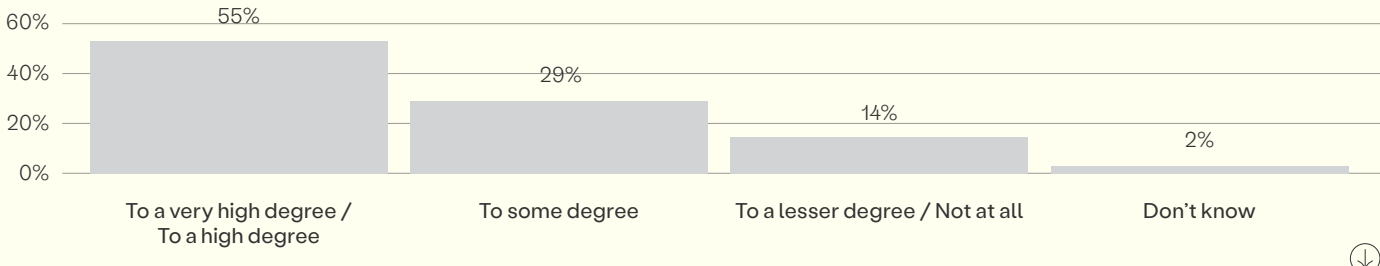


Diagram 05

The distribution shows the cross-analysis between Step 3 on The Design Ladder and companies' assessment of design's impact on financial performance.

4

DESIGN AS STRATEGY

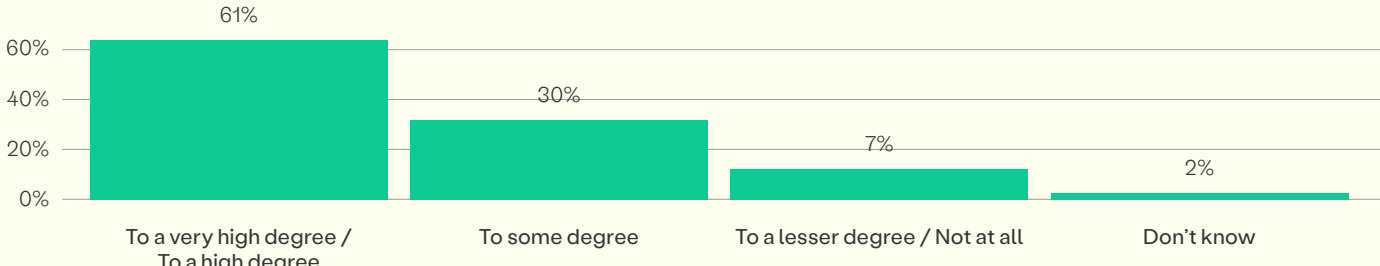
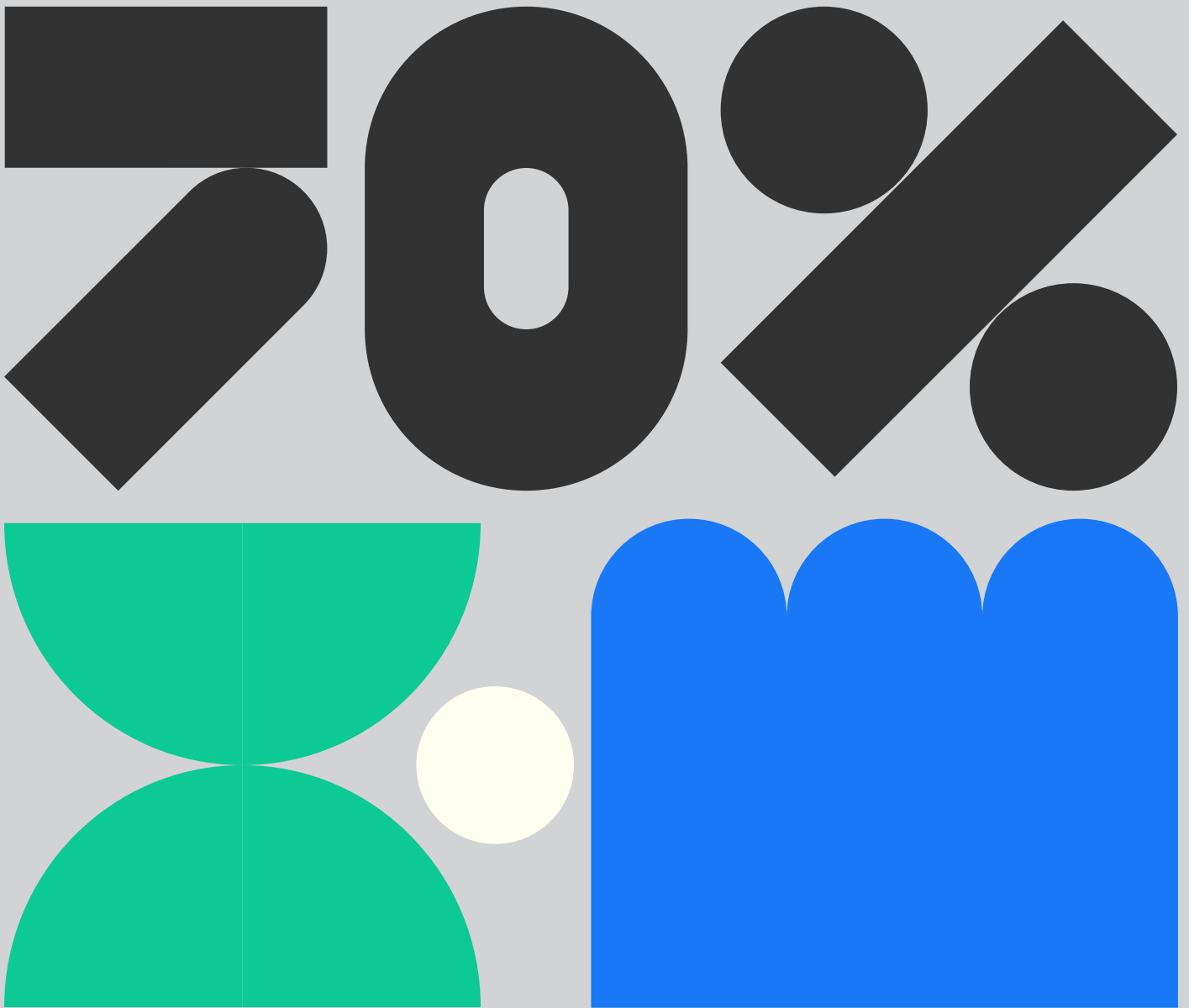


Diagram 06

The distribution shows the cross-analysis between Step 4 on The Design Ladder and companies' assessment of design's impact on financial performance.



When asked directly, 70% of Danish companies that use design assess that design strengthens their competitiveness to a high or very high degree

DESIGN GRANTS ACCESS TO NEW MARKETS THAT STRENGTHEN COMPETITIVENESS

Among the 600 companies surveyed, those that use design to reach new markets and customers are also the ones most likely to report stronger competitiveness. The results show a clear correlation. Design, therefore, has the potential to drive market development and positioning in new segments and markets.

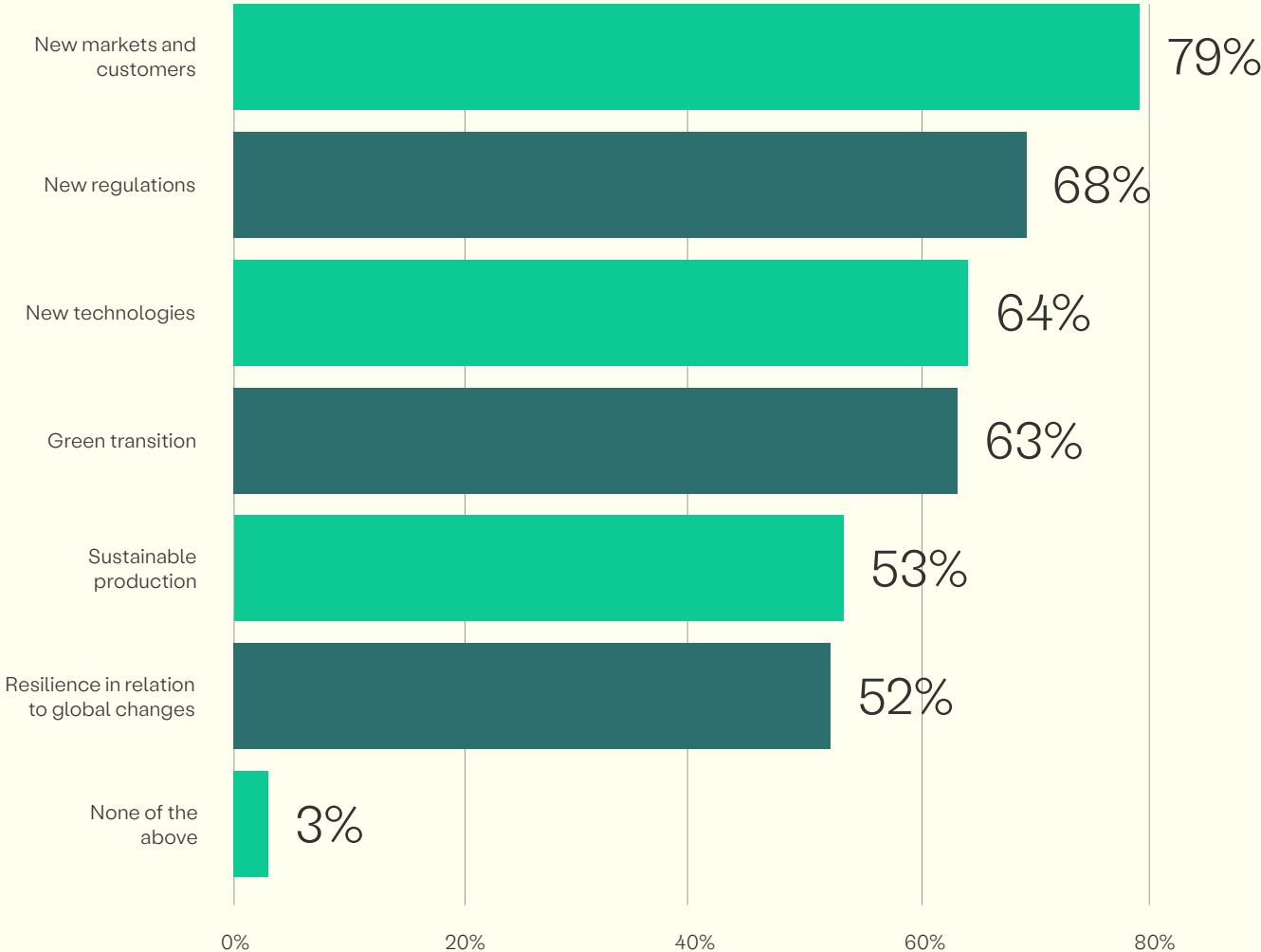


Diagram 07

The distribution shows the cross-analysis between what companies use design for and the share of companies that assess that design strengthens competitiveness to a high or very high degree.

DESIGN CREATES VALUE ACROSS MULTIPLE AREAS

Design creates value across many areas of a business. Companies point to increased sales, the ability to differentiate from competitors, a stronger brand and image, and the development of user-friendly solutions, new business models, and improved resource efficiency.



DANISH COMPANIES PARTICULARLY HIGHLIGHT:

- * Differentiation (93%)
- * Brand (92%)
- * Sales (92%)

The diagram shows the share of companies that assess that design creates value to some degree, a high degree or a very high degree.

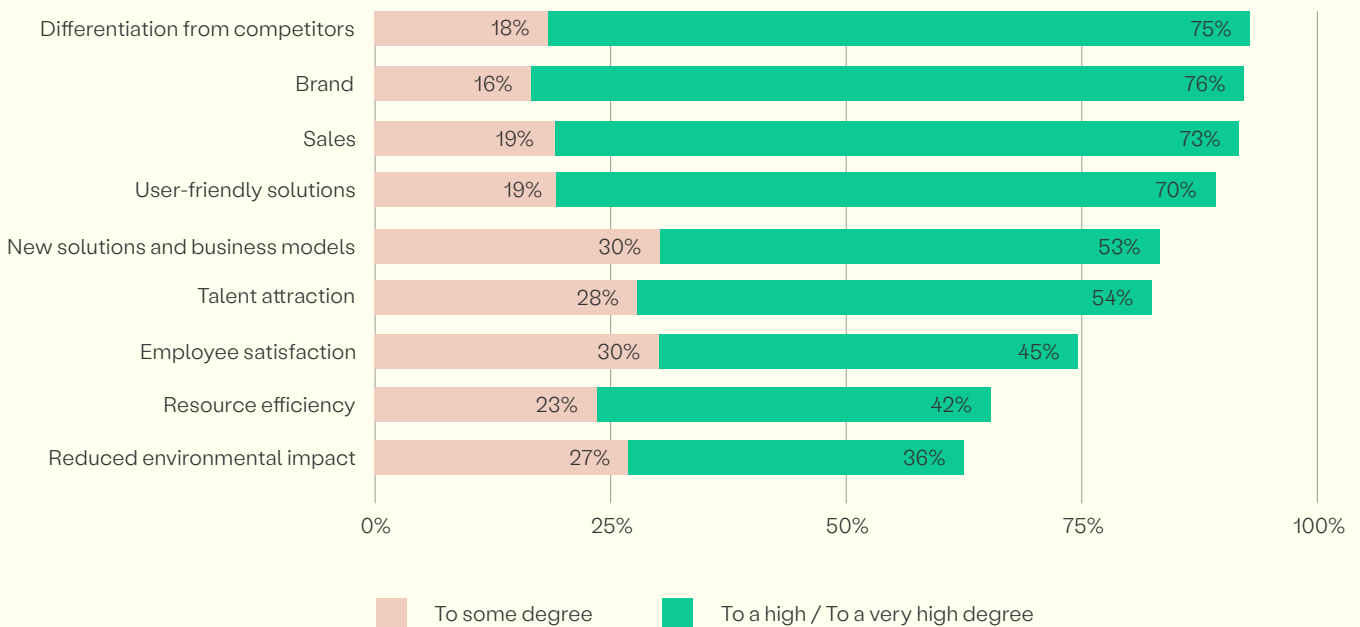
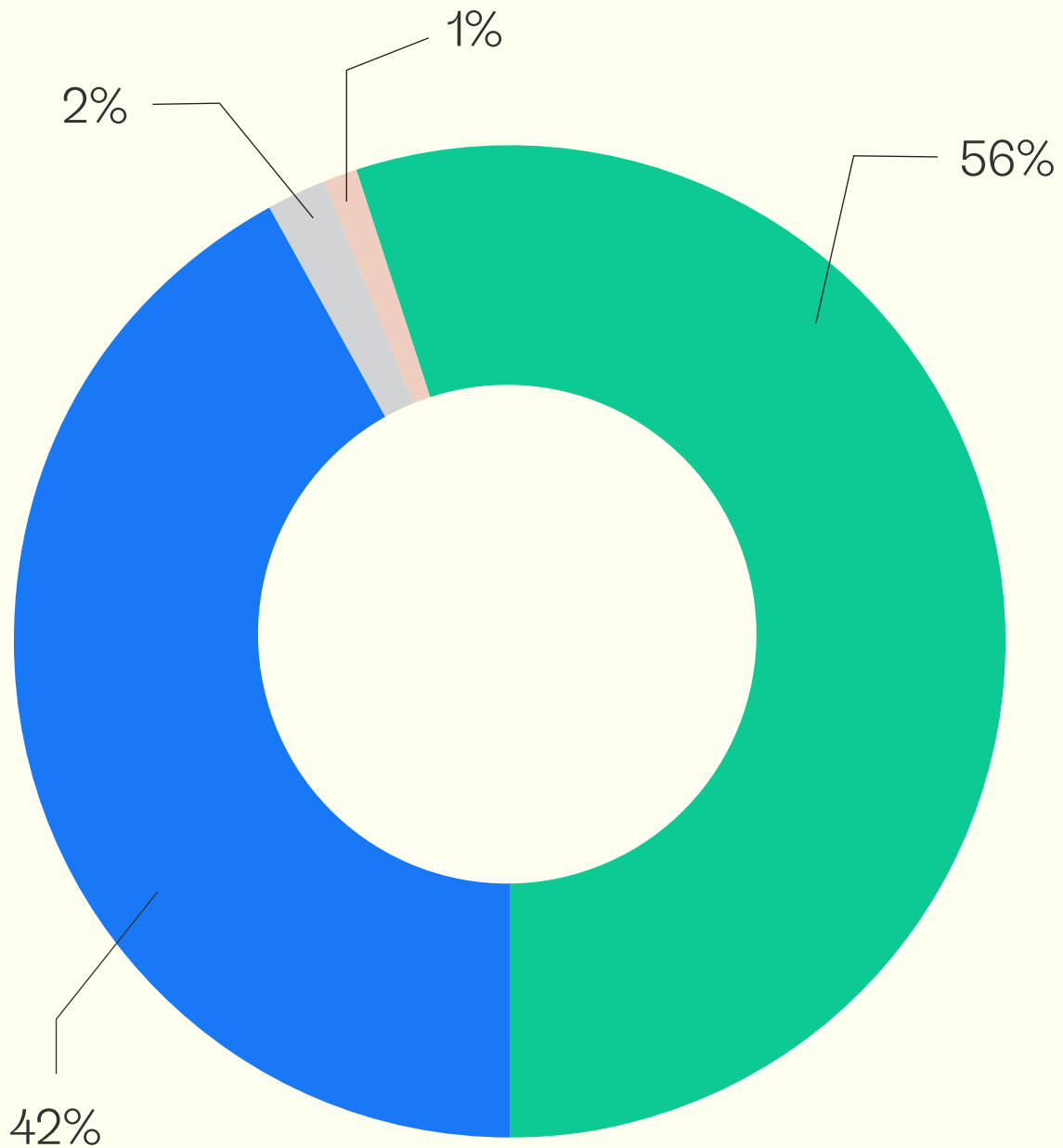


Diagram 08

The distribution shows companies' responses to the question: For each of the following areas, please indicate to what extent the use of design creates value for your company. Companies could select multiple answers. The responses "to a lesser degree", "not at all" and "don't know" are excluded from the diagram.

DESIGN WILL BECOME MORE IMPORTANT IN THE FUTURE

For the Danish companies surveyed, design is expected to become an even more important competitive factor in the years ahead. More than half of the companies that already use design assess that it will become a more or much more important parameter of competitiveness within the next five years.



- Much more important / More important
- Remains the same
- Less important / Much less important
- Don't know



Diagram 09

The distribution shows companies' responses to the question: Do you assess that design as a competitive factor will become more important, remain the same, or become less important for your company over the next five years?

All figures are rounded from decimals. As a result, the totals in the distribution may add up to slightly more or less than 100%.

THE ORGANISATION OF DESIGN IN DANISH COMPANIES

Danish companies organise design work in many ways. The distribution in the chart shows that design decisions in Danish companies are often made at the C-level (executive management and owners), which suggests that design is increasingly recognised as a strategic tool.

At the same time, the results point to an imbalance between design knowledge and decision-making authority. Within executive management, decision-making authority tends to be higher than the level of design knowledge. In marketing and design departments, the opposite pattern appears; knowledge of design is stronger than the mandate to make decisions. This suggests a need to strengthen the connection between knowledge and decision-making power. This can happen either by increasing design understanding among decision-makers or by decentralising certain decisions to employees with relevant design expertise.



48% of decisions about design are made by executive management. If executive management and owners are considered together, design decisions in 71% of surveyed companies are made at the top level

DESIGN KNOWLEDGE VS. DECISION-MAKING AUTHORITY

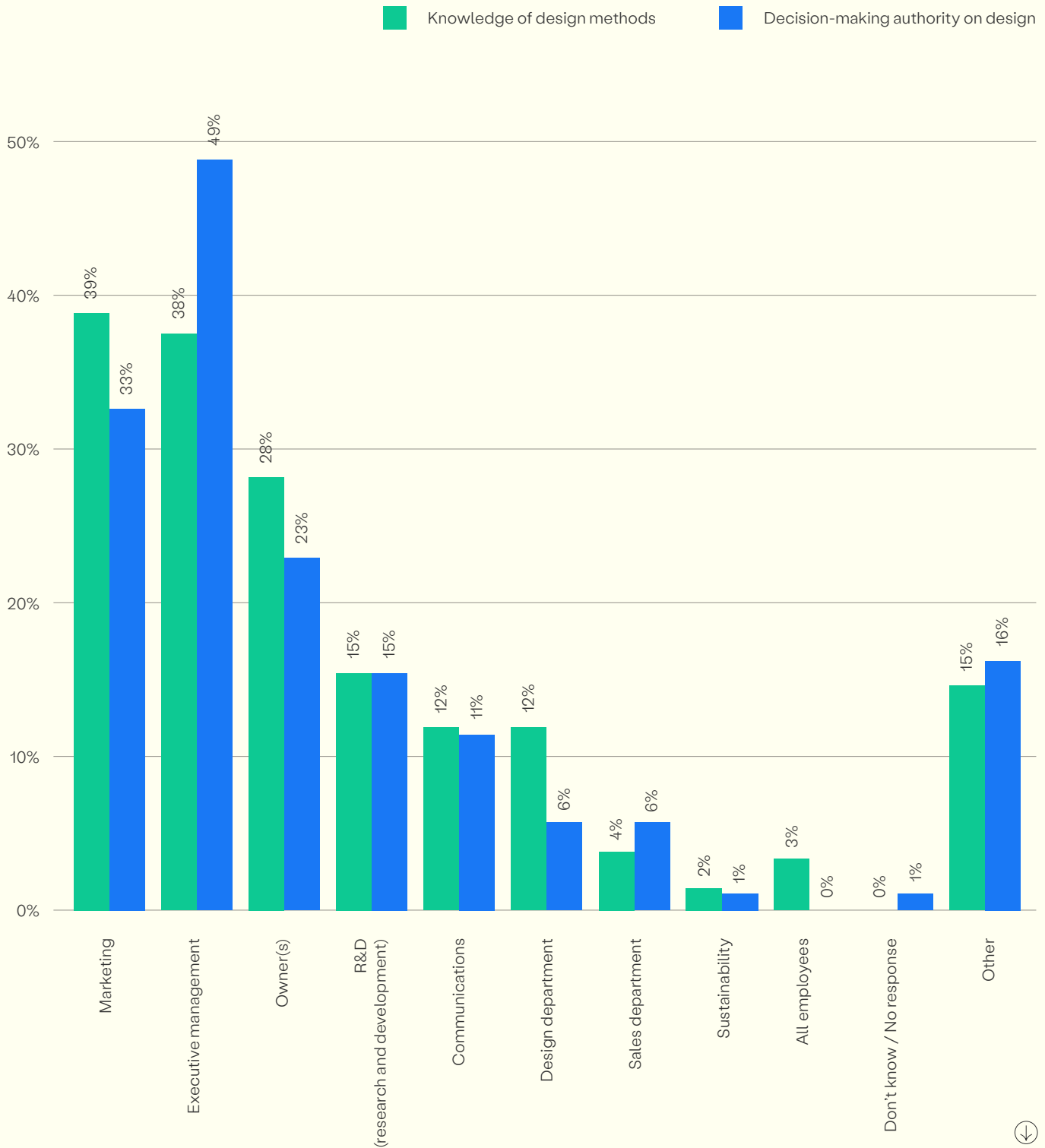
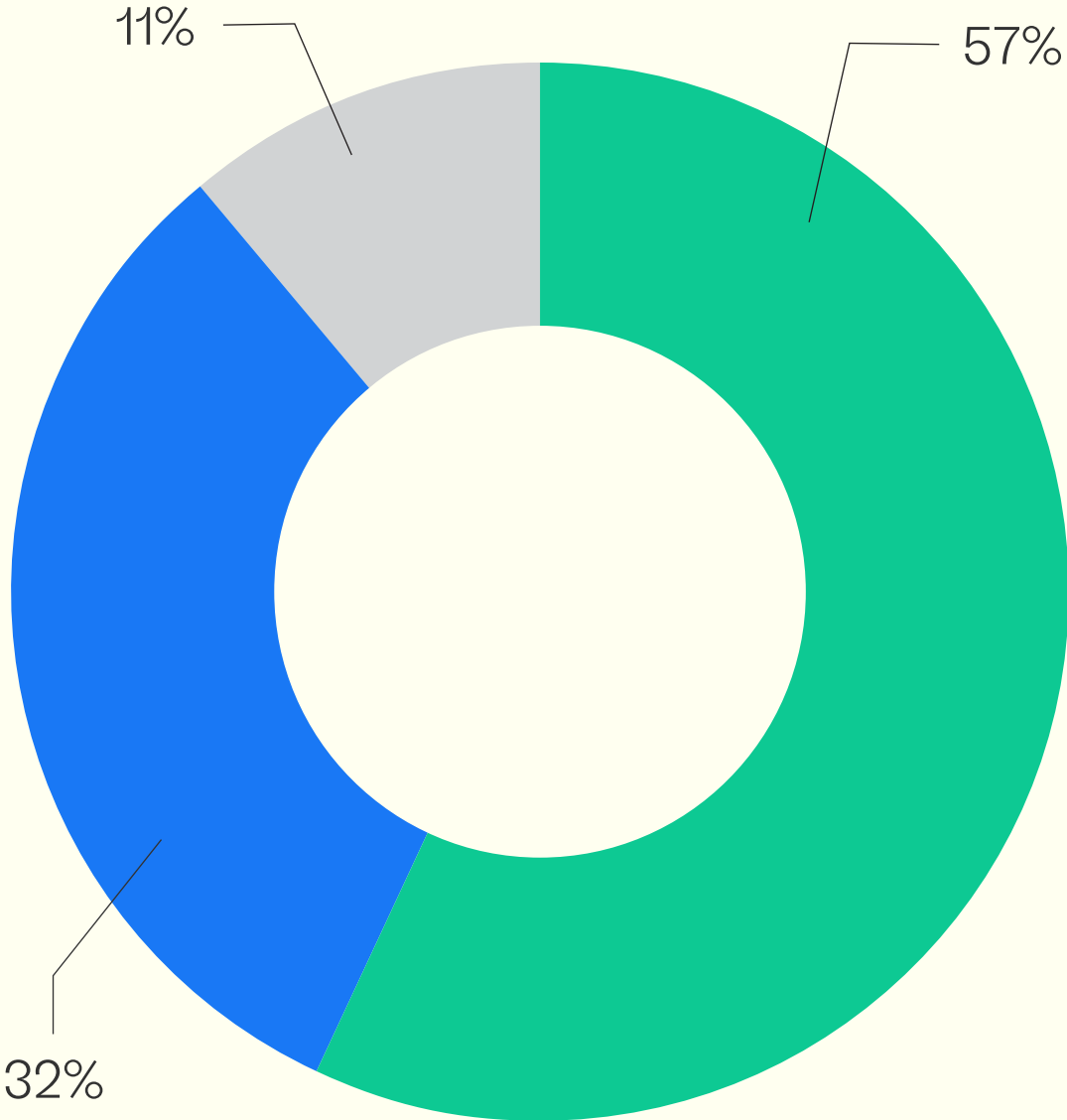


Diagram 10
 The distribution shows companies' responses to the following questions:
 Who in the company has in-depth knowledge of the company's design methods? (blue) and
 Where are design decisions typically made in the company? (green)
 *Companies could select multiple answers.

MOST DESIGN TASKS ARE CARRIED OUT INTERNALLY

Design tasks in Danish companies can be handled by both internal and external resources. Each approach offers advantages, particularly when combined. The companies in the survey primarily solve their design tasks internally. Around one third of companies use a balanced combination of internal and external resources.



- Exclusively or primarily internally
- Exclusively or primarily
- Roughly equal internal / external

Diagram 11
The distribution shows companies' responses to the question:
Are your company's design tasks typically handled internally or externally?

EXTERNAL DESIGNERS ARE A VALUABLE ADDITION

When Danish companies use external design resources such as freelance designers or design agencies, the most common reason is that the task exceeds the company's internal capacity.

In addition, 71% of companies that use design state that external designers are brought in when there is a need for an outside perspective — a fresh set of eyes on development and new perspectives for the company.

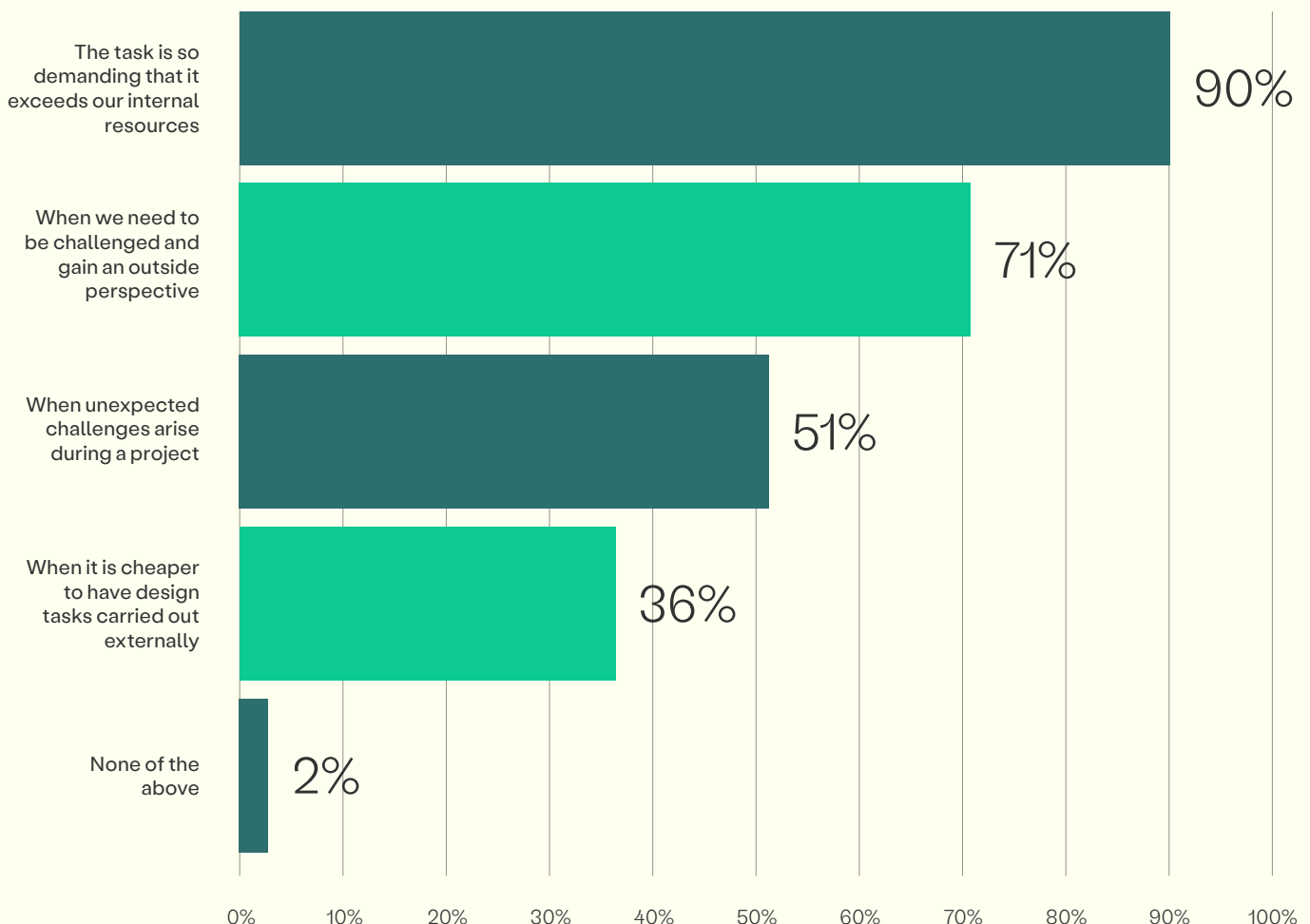
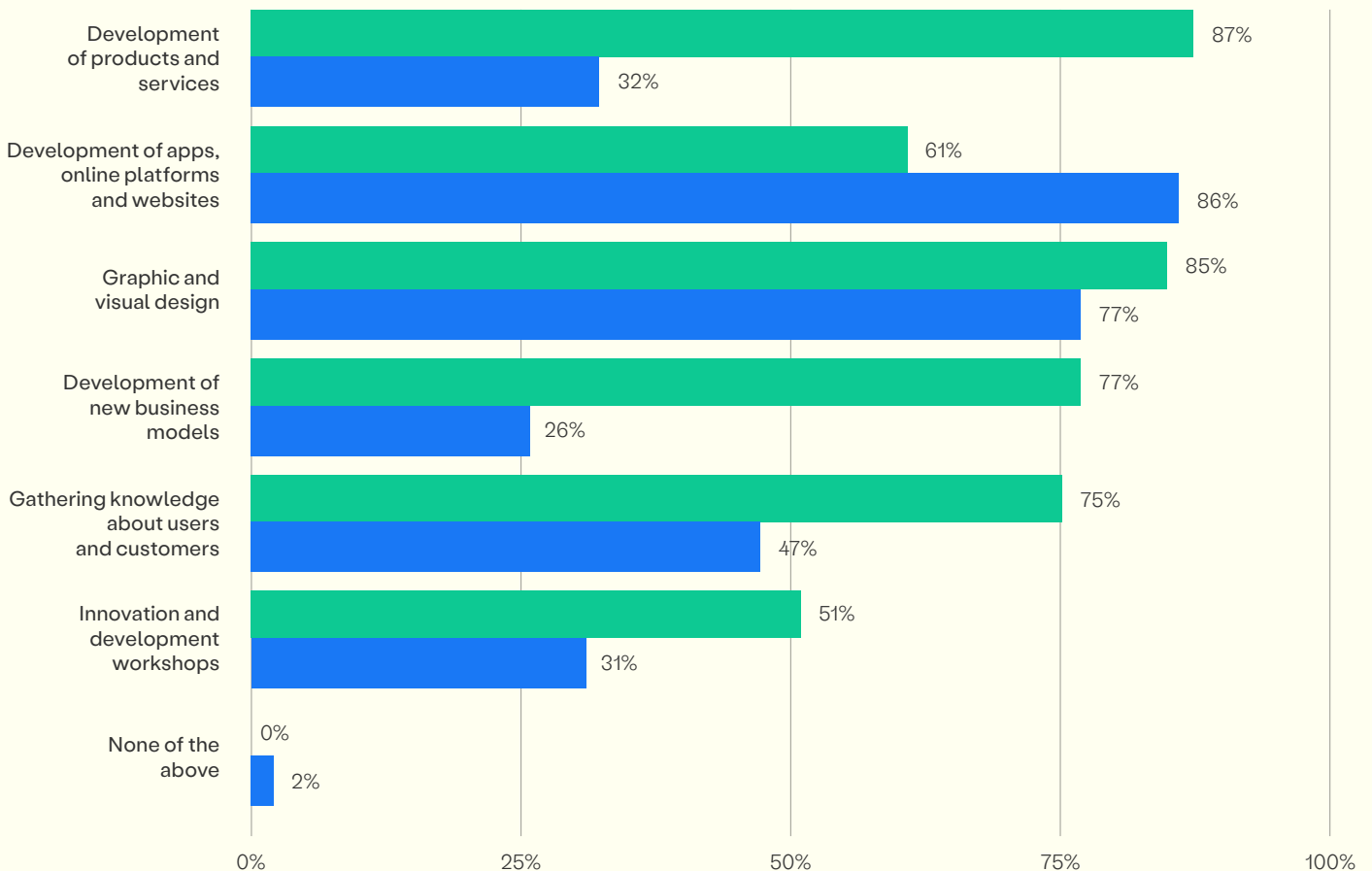


Diagram 12
The distribution shows companies' responses to the question:
In which of the following situations do you typically purchase external design services?

DESIGN OF NEW BUSINESS MODELS AND PRODUCTS IS HANDLED INTERNALLY

The diagram shows different types of design tasks and whether they are handled internally or externally.

External designers are typically used for design tasks such as digital, graphic, and visual design. Internal design resources are more often responsible for tasks related to development processes, user insights, and business strategy. This indicates a potential for companies to involve external design resources more actively in development and strategic work.



Internally
Externally



Diagram 13
The distribution shows companies' responses to the questions:
Which of the following design tasks do you solve externally?
Which of the following design tasks do you solve internally?

DESIGN AS AN INVISIBLE COMPETITIVE FACTOR

What about companies that do not use design? At the beginning of the survey, before companies had the opportunity to identify themselves as non-users of design, all companies were asked which factors are most important for their competitiveness.

More than half of the companies in the study consider design in itself to be an essential competitive factor. However, compared to the other factors, design ranks lowest among these factors.

There may be several explanations for this. Design is often used as a means to strengthen other areas such as branding or innovation. As a result, design is less frequently viewed as a goal in itself, even though the data shows that it contributes significant value to areas such as branding.

This is noteworthy because design can influence all the other factors companies identify as important for competitiveness. The findings suggest that many companies may not yet be fully aware of the potential associated with becoming design-intensive.

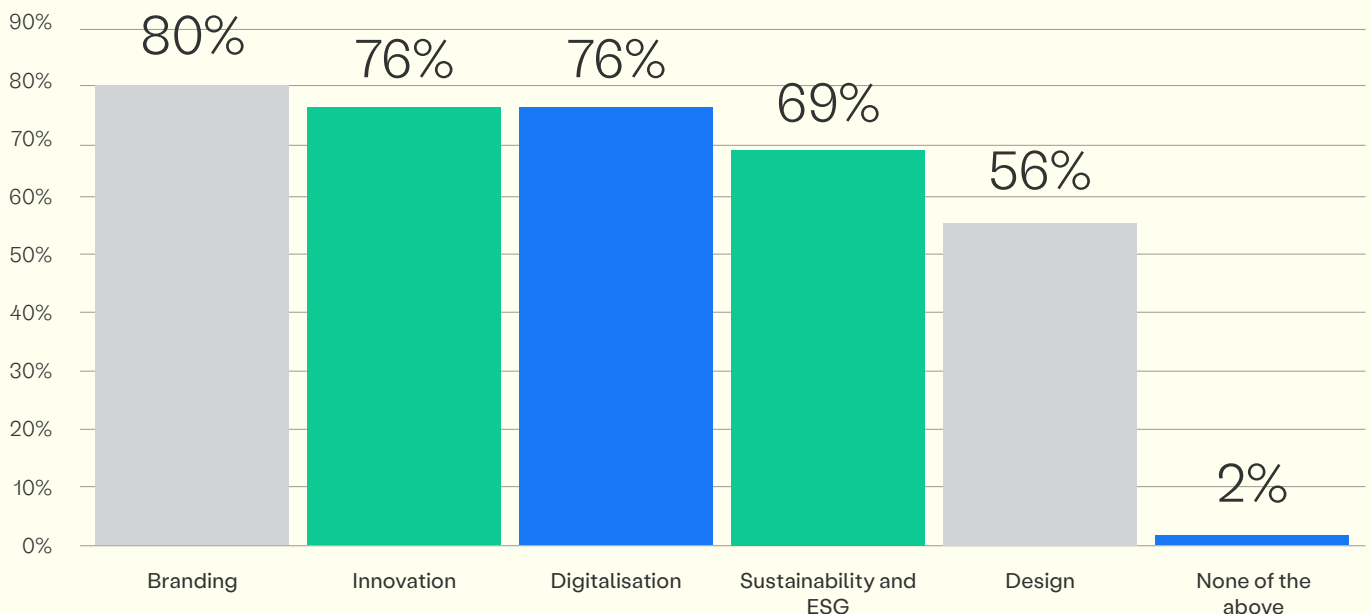


Diagram 14

The distribution shows companies' responses to the question: Which of the following factors are important for your competitiveness?
*Companies could select multiple answers.

DESIGN IS PERCEIVED AS IRRELEVANT

In the survey, 20% of companies state that they do not use design in their business — the non-users on The Design Ladder.

The primary and almost sole barrier to using design is that companies consider it irrelevant for their business.

The most common industry among non-users is construction, which represents 21% of the non-user group. Beyond this, there are no major sector differences in the use of design.

Only a small number of companies indicate that they avoid design because they cannot afford it or because they are uncertain about the value design might create.

The study therefore shows that barriers to using design are not related to negative past experiences or uncertainty about where to find designers to collaborate with.

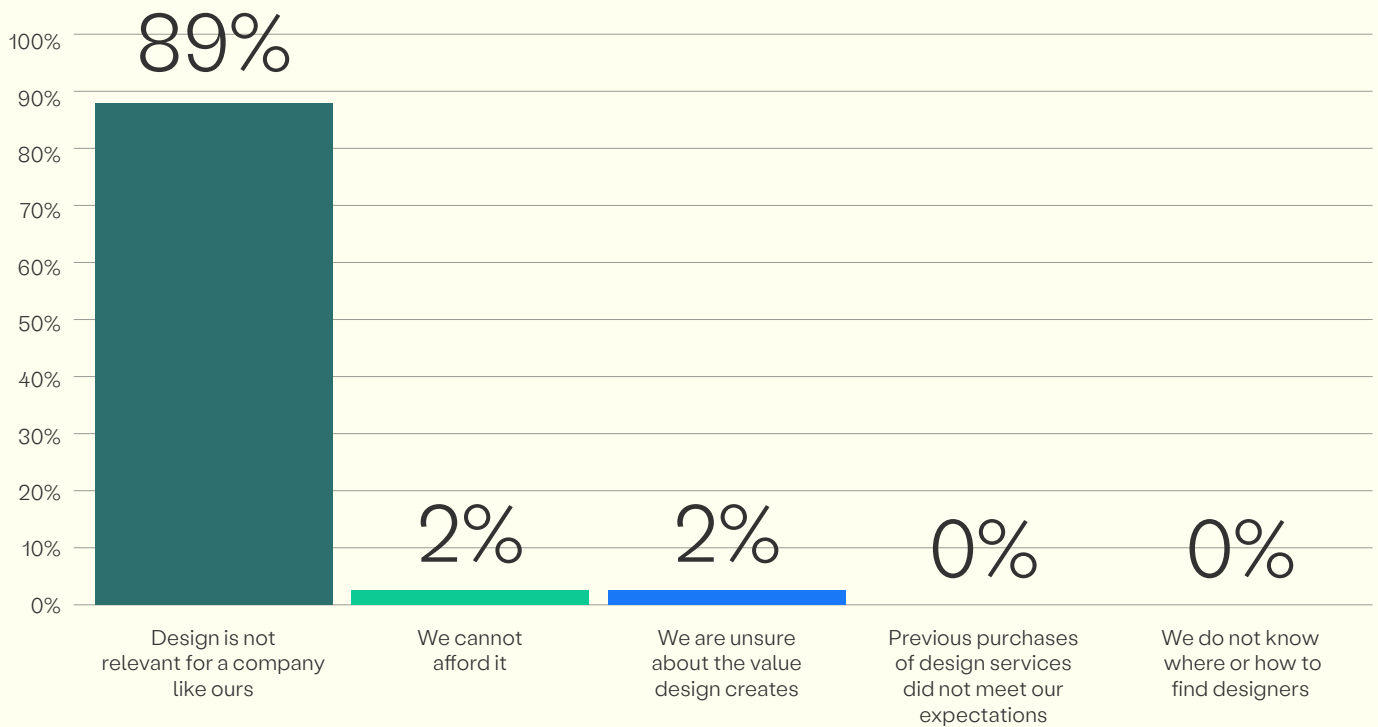


Diagram 15
The distribution shows non-users' responses to the question:
Why does your company not use design?

FROM UNCONSCIOUS TO CONSCIOUS USE OF DESIGN

Although 20% of surveyed companies do not perceive design as relevant, the data shows that many of the activities carried out by these companies are in fact design-related. As the table shows, non-users also work with involving users and customers early in development processes, and more than half work with aligning the visual expression and appearance of products and services — in other words, styling.

This can be described as an “invisible” use of design, pointing to an unconscious use of design methods. The survey therefore indicates potential for companies in this group to work more consciously and systematically with design. By doing so, they are more likely to experience the positive effects that design can create.

WHICH OF THE FOLLOWING STATEMENTS APPLY TO THE COMPANY?

We work with aligning the visual expression of our products and services	54%
We involve users and customers early in the development of our products and services	45%
We use methods such as concept development, user journeys, and prototypes to develop strategy and business models	17%
None of the above	20%

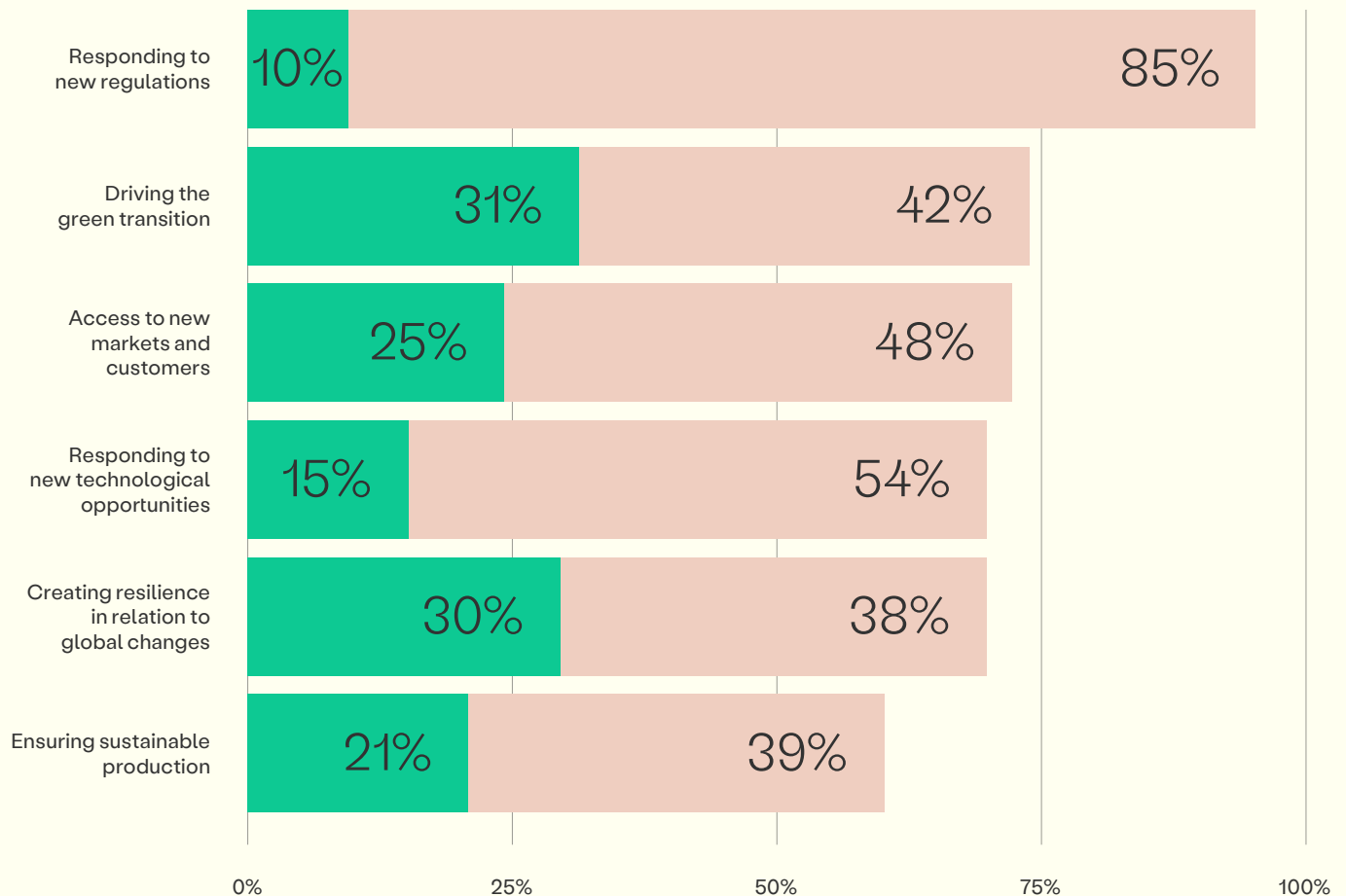


Table 01
The distribution shows non-users' responses to the question:
Which of the following statements apply to your company?
*Companies could select multiple answers.

NON-USERS FOCUS ON RESPONDING TO NEW REGULATIONS

The diagram shows that non-users primarily focus on responding to regulations. This may indicate a more reactive approach to business development, where companies mainly act in response to external requirements rather than anticipating developments or working proactively with innovation. Working with new technologies or exploring new markets and customers is assessed as less important for business development among companies that do not use design.

TO WHAT EXTENT DO THE FOLLOWING FACTORS MOTIVATE DEVELOPMENT?



■ To some degree
■ To a high / To a very high degree



Diagram 16
 The distribution shows non-users' responses to the question: To what extent do the following factors drive your company's development?

DANISH COMPANIES SHARE THE SAME PRIORITIES



FOUR KEY PRIORITIES MOTIVATE BUSINESS DEVELOPMENT AMONG NON-USERS

- * responding to new regulations
- * driving the green transition
- * access to new markets and customers
- * responding to new technological opportunities

These are the same four priorities that motivate companies to use design. This may indicate that non-users are not yet fully aware of the potential connection between business development and the strategic use of design.



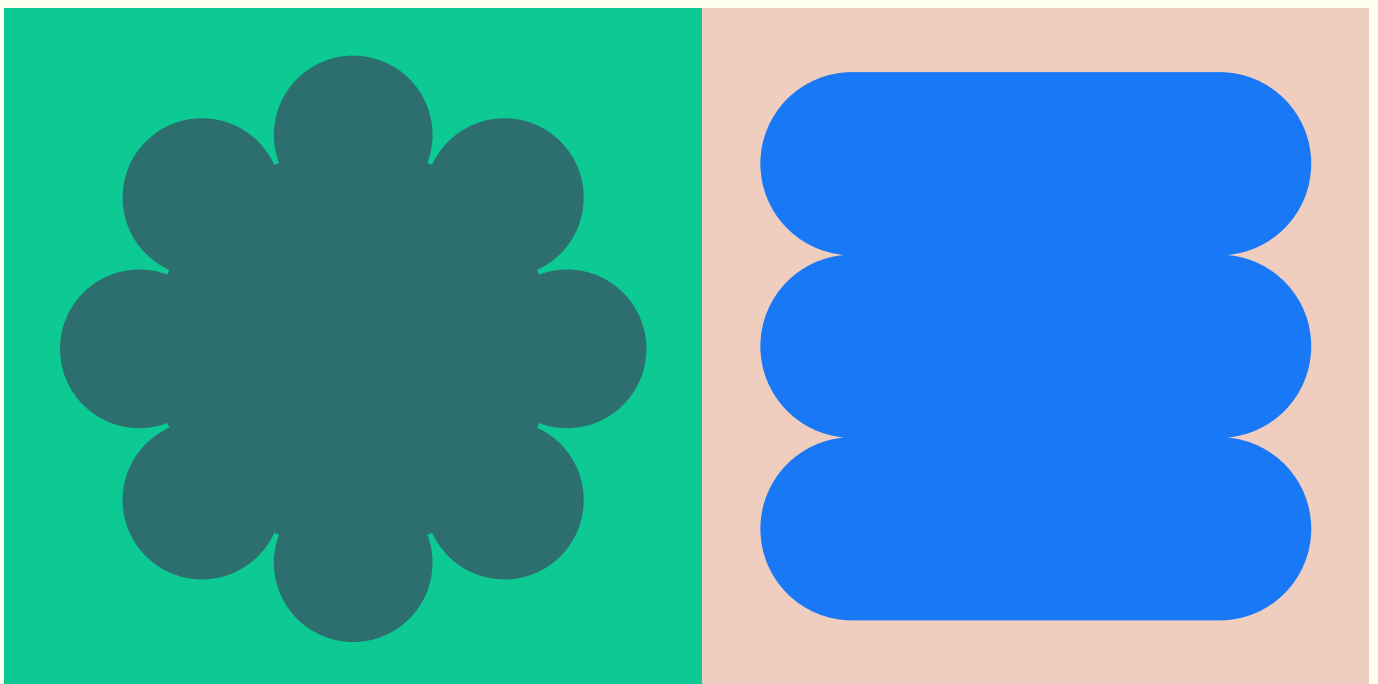
DESIGN COMPETENCIES ARE RELEVANT FOR ALL

The chart on the following page shows which competencies Danish companies consider essential for ensuring continued development in the coming years. Responses from all 600 surveyed companies are included across the four steps of The Design Ladder. This means companies that do not currently use design (Step 1) are also represented.

The competencies companies highlight most frequently relate to the development of products and services and to gathering knowledge about users and customers. These areas can be strengthened through design and represent concrete tasks that can be carried out by employees or external partners.

This pattern appears across companies at all levels of The Design Ladder.

85% of companies at Step 4 (design as strategy) consider competencies related to developing products and services as essential for the company's future development, compared to 59% of companies at Step 1. The difference between Step 1 and Step 4 companies is clear. Companies that currently do not use design because they consider it irrelevant could benefit from recognising that design may in fact be highly relevant for them.



THE FUTURE CALLS FOR DESIGN COMPETENCIES

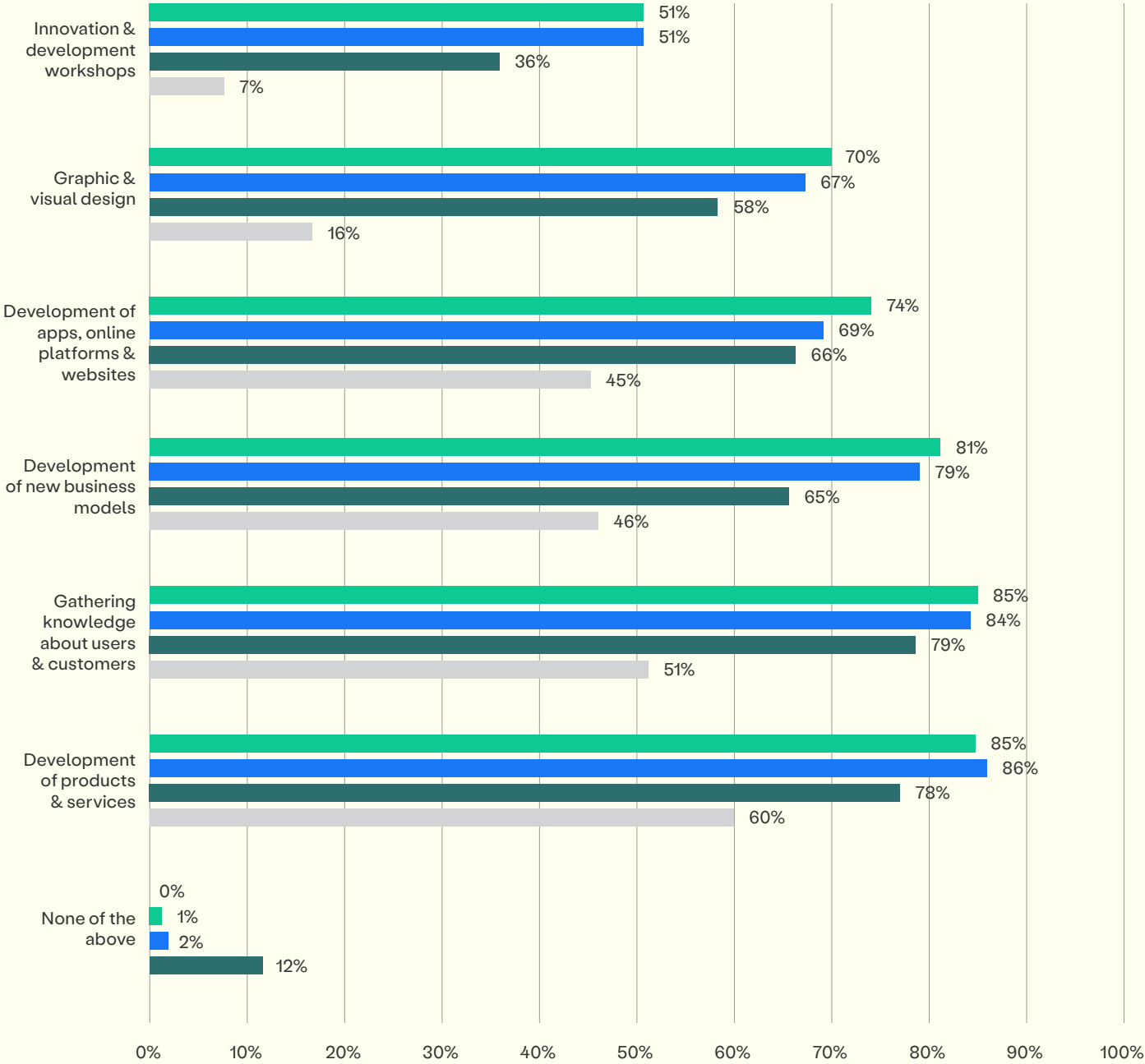


Diagram 17

The distribution shows companies' responses to the question: Which of the following competencies are essential to ensure your company's continued development in the coming years? *Companies could select multiple answers.

- Step 01
- Step 02
- Step 03
- Step 04

HOW THE STUDY WAS CONDUCTED

Design Delivers 2025 was conducted by Megafon on behalf of the Danish Design Center (DDC) and the Confederation of Danish Industry (DI). The study is based on telephone interviews conducted between 9 April and 22 May 2025 with representatives from 600 Danish private companies with at least 10 employees. Respondents were selected on the basis that they have the authority to speak on behalf of the company, such as CEOs, company owners, heads of innovation, heads of development, or marketing directors.

The questionnaire was developed and tested by Danish Design Center in collaboration with Danish Industry and Megafon. The 600 interviews provide a sufficient sample size to ensure statistical reliability. The sample for Design Delivers 2025 was designed to be representative of Danish private companies across industry sectors, geography, and company size. Companies in the sample were stratified by company size according to the share of the workforce employed within each size category. This approach ensures that the relatively small number of companies with many employees are also included in the survey. This method provides the most representative and accurate picture of Danish companies. Results from Design Delivers 2025 cannot be directly compared to earlier surveys (2016, 2018, and 2022), as the samples were constructed using different methods. In earlier surveys, companies were selected based on the number of companies within each size category. The 2025 study instead reflects the distribution of the workforce. This means that companies with more than 100 employees previously accounted for less than 10% of the sample, whereas in 2025, they account for half of the sample. As a result, Design Delivers 2025 provides a more representative picture of Danish business and establishes a new baseline for future measurements.

All figures are rounded from decimals, which means totals in certain charts and tables may not add up exactly to 100%. Table 2 on the next page shows the distribution of the 600 participating companies based on three background questions.

DISTRIBUTION OF PARTICIPATING COMPANIES

COMPANY SIZE

10-49 employees	36%
50-99 employees	12%
More than 100 employees	51%

COMPANY TYPE

Service / consultancy company	53%
Manufacturing company with own products	33%
Manufacturing company operating as subcontractor	10%
Cannot assess	5%

CUSTOMER SEGMENT

B2B	58%
B2C	15%
Both	27%
Cannot assess	1%



Table 2
The distribution shows companies' responses to the following questions:
How many employees does your company have?
Which of the following categories best describes your company type?
Is your company primarily B2B, B2C, or both?

