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**SURVEY ON THE
PERFORMING ART**



2021 Survey on the Performing Arts in South Korea

1. Purpose of the Survey

The "Survey of the Performing Arts" aims to gain an objective and reliable understanding of the current state of the performing arts sector and thereby provide preliminary data to establish a policy initiative for promoting the performing arts.

2. Background and Survey Direction

The "Survey of the Performing Arts" was conducted for the first time in 2005 in the performing arts sector, as systematic data and information on the performing arts field was lacking. In 2007, with approval from Statistics Korea to produce statistics, the objectivity and reliability of the survey were enhanced.

Typically, the performing arts market is structured so that the agents of "creation (production), distribution (intermediary), consumption (enjoyment)" and performing arts sponsors are mutually connected. The Survey of the Performing Arts targets the main areas of such characteristic of the market structure.

The 2022 Survey of the Performing Arts examined the performing arts facilities (performance venues), which are part of the distribution (intermediary) segment of the performing arts sector; performing arts organizations, which are part of the creation (production) segment; and the administrative organizations (central and local governments) that are responsible for providing public support.

The performing arts facilities subject to this survey were classified by the characteristics of the facilities into five categories—central government, culture and art centers, others (public), Daehangno (Daehak-ro), and others (private). In addition, the performing arts organizations were classified by the characteristics of the organizations into five categories—national, public (metropolitan cities), public (cities and counties), private performing arts organizations, and private production agencies. After designing a sample that reflects the characteristics of the performing arts market, this survey estimated the scale of the market. The performing arts administrative organizations were divided into the Ministry of Culture, Sports and Tourism and local governments.

3. Survey Target

In addition to the surveyed organizations and facilities of the previous year, the list of registered performance venues, the list of local culture and art centers, and the list of performance venues that are members of the Korea Art Theater Association were included in this year's survey. The survey target was finalized through official literature review.

Survey Target and Population Collection Route

Survey Target	Survey Range and Survey Population Collection Route
Administrative organizations for the performing arts	<ul style="list-style-type: none"> – Central government (Ministry of Culture, Sports and Tourism; Arts Council Korea) – Local governments (Metropolitan cities, cities, and counties)
Performing arts facilities	<ul style="list-style-type: none"> – Facilities surveyed in the previous year's Survey of the Performing Arts – Registered performance venues nationwide according to the Public Performance Art (50 seats or more; or floor area of 50 square meters or more for audience seating) – Korea Art Theater Association member performance venues (100 seats or less) – Culture and arts centers nationwide
Performing arts organizations	<ul style="list-style-type: none"> – Organizations surveyed in the previous year's Survey of the Performing Arts – Organizations that have applied and selected for the Arts Council Korea's Culture and Arts Support Program – Member organizations of the Korea Musical Theatre Association – {Professional Performing Arts Companies

As for performing arts facilities, facilities that belong to the central government, culture and art centers, and other (public) facilities were classified as public, while those located at Daehangno (Daehak-ro) and other private facilities (that are not located in Daehangno) were classified as private. As for performing arts organizations, national and public organizations that belong to metropolitan cities, cities, and counties were classified as public, while private performing arts organizations and private performing arts agencies were classified as private.

Classification of the Survey Target

Category	Performing arts facilities	Performing arts organizations
Public	Central government Culture and art centers Others [public]	National Public [metropolitan cities] Public [cities and counties]
Private	Daehangno (Daehak-ro) Private [other than Daehangno]	Private performing arts organizations Private performing arts agencies

4. Survey Overview

Survey Period and Surveying Agency

Category	Contents
Survey base period	December 31, 2021
Reference period	January 1 – December 31, 2021 (1 year)
Survey period	Performing arts facilities: May 9 – September 23, 2021 (about five months) Performing arts organizations: May 9 – October 3, 2021 (about five months)
Number of target performing arts facilities and organizations	Performing arts facilities: 968 Performing arts organizations: 4,261
Final valid response	Performing arts facilities: 752 (complete enumeration+sample) Performing arts organizations: 2,016 (complete enumeration+sample)

5. Method

In principle, this survey must be conducted face-to-face, by having a surveyor visit performing arts facilities and organizations to collect responses from those in charge of the facilities and organizations, to minimize non-sampling error. However, due to COVID-19, the survey was conducted online. Due to the nature of the performing arts facilities and organizations, when those in charge of such tasks do not belong to the facilities or organizations, or when it was difficult to conduct the survey online, the survey was conducted via means preferred by the respondents, such as fax and email. In addition, the collected questionnaires were verified to ensure objectivity and reliability of the survey.

■ Performing Arts Market Size

1. The total size of Performing Arts Market

1) Market size

Looking at the size of the performance market in 2021, in the case of performance facilities, the total number of facilities was 968, the number of workers was 12,180 and sales were KRW 191.4 billion. Performing organizations were identified as 4,261 organizations, 55,651 employees, and sales of 301.8 billion won.

[Table 2-1] Performig Arts Market Size

Category	Number of Facilities/Groups (Number)	Number of employees (persons)	Sales (KRW 1 million)*
Total	5,229	67,832	493,266
Performing arts facilities	968	12,180	191,441
Performing arts organizations	4,261	55,651	301,825

* Sales were calculated as 'self-income and other income' among the income of performing facilities and performing organizations.

Looking at the size of the performance market over the past 10 years (2012-2021), the number of performance facilities increased from 944 facilities in 2012 to 968 facilities in 2021. The number of workers increased from 11,224 in 2012 to 12,180 in 2021, and sales decreased from 377.2 billion won in 2012 to 191.4 billion won in 2020.

The number of performing organizations increased from 2,108 in 2012 to 4,261 in 2021. The number of workers increased from 50,847 in 2012 to 55,651 in 2021, and sales decreased from 335.9 billion won in 2012 to 301.8 billion won in 2021.

2) Number of performance facilities and organizations

The number of performance facilities decreased by 3.9% year-on-year (39 decrease), and the number of performance organizations increased by 0.6% year-on-year (24 increase).

[Table 2-2] Number of performance facilities and organizations

Category	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Increase or decrease compared to the previous year's survey	
											Number of increase and decrease (unit)	Rate of increase and decrease (%)
Total(unit)	3,052	984	3,318	3,319	3,356	3,880	4,663	5,000	5,244	5,229	△15	△0.3
Performing arts facilities (unit)	944	984	1,034	1,026	992	1,019	1,029	1,028	1,007	968	△39	△3.9
Performing arts organizations (unit)	2,108	—	2,284	2,293	2,364	2,861	3,634	3,972	4,237	4,261	24	0.6

3) Number of performance facilities and group workers

The number of performance facility workers decreased by 2.7% year-on-year (342 people decreased), and the number of performance group workers increased by 1.0% year-on-year (534 people increased).

[Table 2-3] Number of performance facilities and group workers

Category	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Increase or decrease compared to the previous year's survey	
											Number of increase and decrease (person)	Rate of increase and decrease (%)
Total (person)	62,071	11,738	68,527	62,176	62,589	62,702	63,488	64,479	67,640	67,832	192	0.3
Performing arts facilities (person)	11,224	11,738	12,669	12,513	11,394	12,377	12,206	13,370	12,522	12,180	△342	△2.7
Performing arts organizations (person)	50,847	-	55,858	49,663	51,195	50,325	51,281	51,109	55,118	55,651	534	1.0
Member	44,817	-	50,065	43,383	44,534	43,641	45,001	44,966	48,912	49,296	384	0.8
Support Personnel	6,030	-	5,793	6,280	6,661	6,684	6,280	6,144	6,206	6,355	149	2.4

4) Performance facilities and group sales

Sales of performance facilities increased 33.1% year-on-year (47.6 billion won) and sales of performance organizations increased 20.3% year-on-year (51 billion won).

[Table 2-4] Performance facilities and group sales

Category	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Increase or decrease compared to the previous year's survey	
											Number of increase and decrease (1 million won)	Rate of increase and decrease (%)
Total (1 million Won)	713,045	414,204	759,315	781,491	747,991	813,218	823,255	852,985	394,626	493,266	98,640	25.0
Performing arts facilities (1 million won)	377,169	414,204	368,890	387,433	343,458	350,004	339,489	322,007	143,793	191,441	47,648	33.1
Performing arts organizations (1 million won)	335,876	-	390,425	394,058	404,533	463,214	483,765	530,978	250,833	301,825	50,992	20.3

2. Comparison of Market Size by Characteristics

1) Performing Arts Facilities

When looking at performance facilities by facility characteristics, the private sector (other than Daehak-ro) accounted for the largest proportion with 38.4%, followed by literature and arts centers with 27.5%. The number of workers was the highest at 48.7%, followed by 19.8% for other (public) and 17.0% for the private sector (other than Daehak-ro). In terms of sales, the proportion of private (outside Daehak-ro) facilities was the highest at 37.0%, followed by 32.6% of literary centers and 14.2% of the central government.

2) Performing Arts Organization

Looking at performance groups by group characteristics, private performance groups accounted for the majority with 80.2%, followed by private agencies with 11.4% and public (basic) organizations with 6.5%. The number of workers was high in the order of 64.4% for private performance organizations and 20.4% for public (basic). Sales were high in the order of 70.4% for private agencies and 23.7% for private performance organizations.

■ Performing Arts Market Features

1. Current status of public support in the field of performing arts

The amount of performing arts budget supported by the central government and local governments totaled 2.584 trillion won, of which the central government budget was 355.1 billion won and the local government budget was 2.2299 trillion won. Among the central government's cultural budget, the culture and arts budget accounted for 86.5% and the performing arts budget accounted for 10.2%, while local governments accounted for 49.8% of the culture budget and 19.0% of the performing arts budget.

[Table 2-5] The size of the cultural budget/culture and arts budget/performance budget of the central government and local governments

Category	Cultural budget (billion won)	Arts and Culture Budget (KRW 100 million)	Performing arts budget (KRW 100 million)
Total	152,076	88,573	25,849
Central Government	34,847	30,155	3,551
Local Government	117,229	58,418	22,299

According to the central government's performing arts budget, 36.9% of the national performance facility operating budget, 26.1% of the national performing organization operating budget, 25.4% of other budgets, 6.4% of the national public performing facility construction budget, and 5.3% of the performing arts activity and festival support.

Looking at the proportion of local governments' performing arts budgets, 36.7% of the budget for performing arts activities and festivals, 22.4% of the budget for operating public performance facilities, 17.8% of the budget for operating public performance organizations, and 5.6% of the budget for building public performance facilities.

2. Operation of performing arts facilities

The performance program utilization rate of performance facilities was the highest at 67.6%, followed by the central government at 65.8%, the private sector at 38.8%, the literary center at 25.1%, and other public at 16.4%.

Looking at the performance program utilization rate of the literature center by region, the performance program utilization rate of the Jeju literature center was the highest at 46.8%, and the performance program utilization rate of the special/metropolitan literature center was more than 30%.

Looking at the overall operating rate of the concert hall by facility characteristics, Daehak-ro was 68.0%, the central government was 66.4%, the private sector (other than Daehak-ro), 28.8%, and other [public] 22.4%.

Looking at the utilization rate of the performance hall by region, the utilization rate of the performance hall in Jeju was the highest at 49.8%, and the utilization rate of the performance hall in Gwangju and Daejeon was more than 40%, higher than that of other local arts centers.

3. Performing arts record by characteristics

1) Performing Arts Facilities

Looking at the proportion of performance performance by facility characteristics, private facilities (other than Daehak-ro) accounted for the highest proportion of performances, 34.8%, 34.6%, and 37.1%, respectively, while literary centers accounted for the highest proportion of 47.5%.

2) Performing Arts organizations

Looking at the proportion of performance performance by group characteristics, private performance groups accounted for the highest percentage of 70.7%, 61.7%, 58.2%, and 45.1%, respectively.

4. Performing Arts Record by Genre

1) Performing Arts Facilities

In the theater genre, 3,948 works were performed 33,226 times in 25,881 days, and about 1.95 million people watched the performance. In the musical genre, about 1,865 works were performed 20,134 times in 14,143 days, and about 4.26 million people watched the performance. It was found that about 1.78 million people watched 10,716 works in the Yangak genre.

2) Performing Arts organizations

Looking at the performance performance of performance groups by major activity genre, it was found that the theater group performed 6,078 works 36,492 times a year, and about 5.25 million people watched the performance. The Yangak group performed 7,804 works 9,126 times in 8,880 days, and about 2.4 million people watched them. The Korean traditional music group performed 7,415 works 8,979 times in 8,530 days, and about 1.33 million people watched them.

5. Financial structure

1) Performing Arts Facilities

Performance facilities accounted for 77.7% of the total income, with 12.9% of their own income and 4.0% of the previous year's carryover. It was found that the proportion of public subsidies for performance facilities was due to the high proportion of public budgets such as literary centers and other public facilities.

Looking at the expenditure structure of performance facilities, ordinary expenses accounted for 63.2% of the total, and project costs accounted for 28.8%.

Looking at the financial independence level, which is the share of self-income in total expenditure, private facilities such as Daehak-ro and private facilities (other than Daehak-ro) were more than 40%, and among public facilities, the central government, literary centers, and other public facilities were 12.6%, 6.8%, and 22.8%, respectively.

2) Performing Arts organizations

Performing organizations account for 64.2% of the total income of public subsidies, 30.0% of their own income, and 3.5% of donations and donations.

In the expenditure structure of performing organizations, current expenses account for 53.7% of the total and project costs account for 43.6%.

Looking at the degree of financial independence centered on performance organizations, private agencies showed the highest financial independence at 51.5%, followed by private performance organizations with 26.1%, national 8.8%, public [wide] 2.0%, and public [basic] organizations with 0.4%.