

2009 Survey of the Performing Arts

(based on 2008)

CONTENTS

Chapter 1 _ Overview

1. Background and Objective of the Survey

Chapter 2 _ Size and Characteristics of Performing Arts Market

1. Overall Scale of the Performing Arts Market
2. Public Support for the Performing Arts Market

Chapter 3 _ Performing Arts Facilities

1. Current State
2. Operation
3. Finance

Chapter 4 _ Performing Arts Organizations

1. Current state
2. Operation
3. Finance
4. Employee

Overview

1. Background and Objective of the Survey

1) Objective of the Survey

<Survey of the Performing Arts> is an official source of statistics related to the performing arts that is compiled under the auspices of Statistics Korea. The survey has been conducted since 2005. In this regard, its main objective is to analyze the current state of performing arts in an objective and reliable manner and to provide the basic materials needed to establish policies designed to activate the performing arts.

2) Survey Approach

The targets of the survey include the administrative bodies of performing arts charged with supporting the performing arts, the performing arts organizations responsible for creating (producing) performance works, and performing arts facilities in charge of the distribution (medium) of performance works. The goal is to analyze the actual state of performing arts market based on such support and management.

Figure 1-1 Structure of the Performing Arts Market



3) Survey Method

The survey was implemented based on a stratified simple random sampling method implemented after a preliminary investigation of performing facilities and organizations for sampling design purposes. To improve the results and prevent any duplicating, data from associate bodies and joint survey method were also used and implemented.

Table 1-1 Survey Method

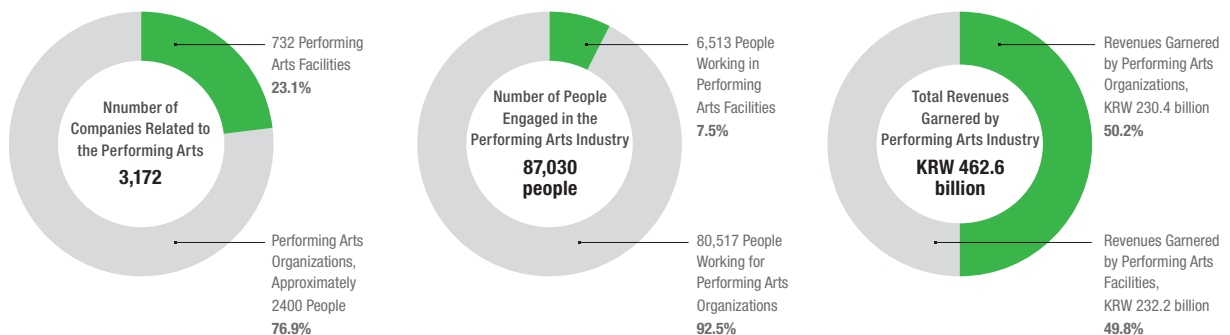
Target Group (Survey population)	<ul style="list-style-type: none"> • 248 Local governments (Ministry of Culture, Sports and Tourism-bibliographical survey) • 732 Performing arts facilities, 2,440 Performing arts organizations nationwide based on the pre-census telephone survey
Effective Sample Size	<ul style="list-style-type: none"> • Public institution: 249 (complete enumeration) • Performing arts facilities: 343(complete enumeration + sample survey) • Performing arts organizations: 789(sample survey)
Sampling Method	<ul style="list-style-type: none"> • Stratified simple random sampling
Survey Method	<ul style="list-style-type: none"> • Primarily, face-to-face survey based on structured questionnaires • If face-to-face engagement proved impossible, alternate surveys conducted via facsimile, e-mail, mail, or others of respondents' preference
Sampling Error	<ul style="list-style-type: none"> • Performing arts facilities: 95% confidence level with a sampling error of $\pm 8.0\%$ • Performing arts organizations: 95% confidence level with a sampling error of $\pm 7.3\%$
Survey Period	<ul style="list-style-type: none"> • Public institution: 2009.10.28. - 2009.11.11. • Performing arts facilities / Performing arts organizations: 2009.8.25. - 2009. 9.23.
Survey Agency	<ul style="list-style-type: none"> • Public institution: Korea Arts Management Service • Performing arts facilities / Performing arts organizations: Dong-seo Research, the Seoul Theater Association

Size and Characteristics of Performing Arts Market

1. Overall Scale of the Performing Arts Market

There were some 3,172 performing arts related companies (performing arts facilities and organizations) engaged in the performing arts market in 2008. This total was broken down into 732 performing arts facilities and 2,440 performing arts organizations. The number of people engaged in the performing arts related industry was estimated to be 87,030 people. While 6,513 people were working in performing arts facilities, 80,517 people were employed by performing arts organizations. The total revenues garnered by the performing arts market has been estimated at KRW 462.6 billion, or 230.4 billion by performing arts facilities and KRW 232.2 billion by performing arts organizations.

Figure 2-1 Scale of the Performing Arts Market
(Number of Companies, Number of Employees, Revenues)



2. Public Support for the Performing Arts Market

1) Budget Size

The scale of the budget set aside for the performing arts by the central and local governments (248 local autonomies) in 2008 was estimated at approximately KRW 909.9 billion. This could be broken down into KRW 201.2 billion provided by the central government and KRW 708.7 billion by local governments. This marked an increase of KRW 5.3 billion over 2006. In this regard, while the budget provided by the central government increased by KRW 34.6 billion, local governments' share decreased by KRW 29.3 billion.

Table 2-1 Budget Size for Arts Market

Year	Classification	Total Budget	Cultural Budget	Budget for Cultural Arts	Budget for Performing Arts
		KRW 100 million	KRW 100 million	KRW 100 million	KRW 100 million
2008	Central Government	1,782,797	21,050	10,709	2,012
	Local Government	1,612,021	47,257	23,143	7,087
	Subtotal	3,394,818	68,307	33,852	9,099
2006	Central Government	1,537,026	18,983	10,552	1,666
	Local Government	1,452,124	35,450	18,233	7,380
	Subtotal	2,965,435	54,433	28,785	9,046

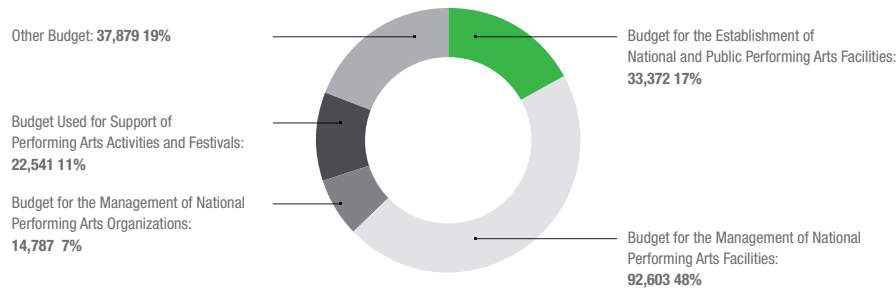
The ratio of the overall cultural budget set aside by the local autonomies in 2008 for the performing arts was estimated at 15% of the overall total. In this regard, the ratio of the overall cultural budget set aside by the local autonomies in 2008 for the performing arts by lower-level local governments was estimated to be 15.5%, this was 1% higher than the 14.5% recorded by upper-level local governments.

Table 2-2 Comparison of the Budget Ratio of Local Governments by Function

Classification	Number of Local Governments	Budget Ratio (%)					
		Cultural Budget/ Total Budget	Budget for Cultural Arts/ Total Budget	Budget for Cultural Arts/ Cultural Budget	Budget for Performing Arts/ Cultural Budget	Budget for Performing Arts/ Budget for Cultural Arts	
Overall	248	2.9	1.4	49	15	30.6	
Area 1	Seoul	26	2.0	1.5	75.2	33.4	44.3
	Busan	17	1.3	0.9	68.1	24.1	35.4
	Daegu	9	6.5	6.1	93.2	5.0	5.3
	Incheon	11	1.3	0.8	61.9	25.4	41.1
	Gwangju	6	2.6	2.0	76.9	14.8	19.3
	Daejeon	6	1.5	0.9	57.6	34.1	59.2

The central government allocated a total of KRW 201.2 billion for the performing arts in 2008. In this regard, the biggest share of this total was made up by the funds set aside for the management of national performing art facilities (46.0%, KRW 92.6 billion).

Figure 2-2 The Government Budget for Performing Arts (Intended usages)



The local governments allocated a total of KRW 700 billion for the performing arts, with the biggest such chunk, KRW 264.7 billion, being set aside for the management of public performing arts facilities. This ratio has risen from 23.0% in 2004 to 37.3% in 2008. The ratio made up by the budget for public performing arts organizations also greatly increased from 16.7% in 2004 to 28.2% (KWR 199.9 billion) in 2008.

2) Trends of Performing Arts Budget

Significant decrease in the budget for the establishment of performing arts facilities, great increase in the operational budget

The budget for performing arts facilities and the management of performing arts organizations accounts for more than 50% of local governments overall budget for the performing arts. Meanwhile, the budget for the establishment of public performing arts facilities decreased from 40.8% of the overall total in 2004 to 10.2% in 2008. Viewed from this standpoint, we can surmise that the focus of local governments' budget for the performing arts has moved from the establishment of public facilities to the management thereof. Thus, there is a strong likelihood that local governments focus with regards to the performing arts will be on the rational management of performing arts facilities and the production of effective contents rather than the establishment of new public facilities.

Performing Arts Facilities

1. Current State

1) Number and Local Ratio of Performing Arts Facilities

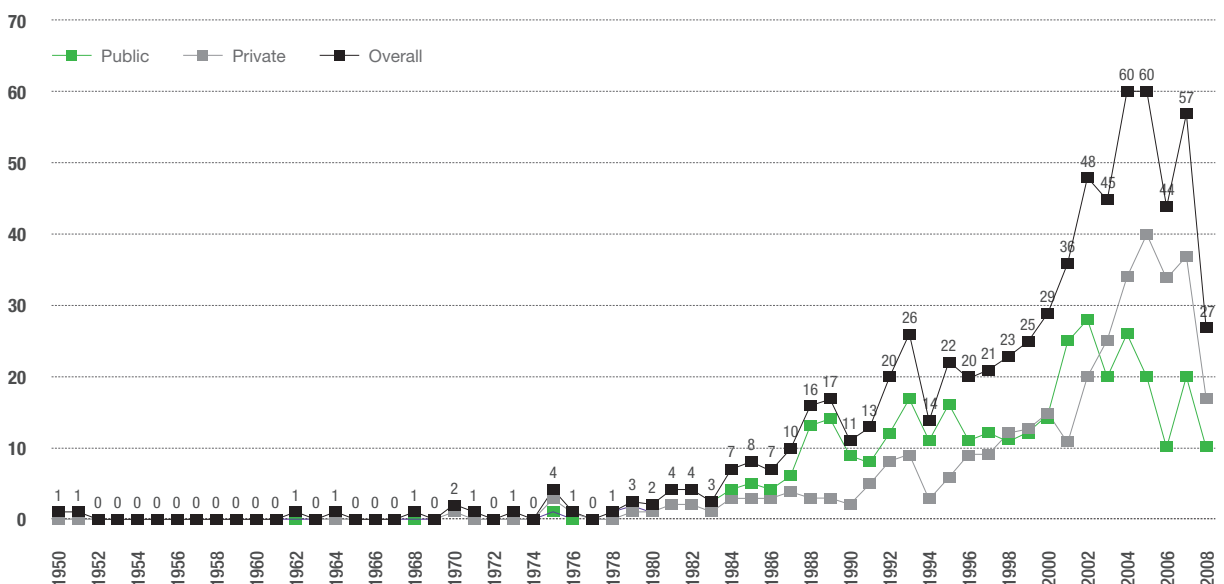
As of 2008, there were a total of 732 performing arts facilities (927 venues), with the majority concentrated in large cities and the capital area. In fact, more than half were located in metropolitan cities (404 facilities, 55.2%) and the capital area, and in particular Seoul, Gyeonggi, and Incheon (399 facilities, 54.5%). Seoul boasts the highest number of performing arts facilities (262, 35.8%).

2) Trends of Establishment of Performing Arts Facilities

End of the wave of establishment of performing arts facilities, move towards the management of facilities and production of contents

The rapid increase in the establishment of performing arts facilities that began in the 1990s continued unabated until 2004. However, it has since rapidly decreased. 24 new performing arts facilities (3.3%) were opened in 2008. As such, we can see that investment in the establishment of performing arts facilities has dropped.

Figure 3-1 Opening of Performing Arts Facilities by Year



2. Operation

1) Ratio of Operation

Decrease in the average operating rate of local cultural centers, the Ulsan Cultural Center records the highest operating rate (67.8%)

The overall operating rate of the 927 venues associated with the 732 performing arts facilities surveyed was estimated at 54.2%. The operating rate of local cultural centers was estimated to average 38.5%. In this regard, the operating rate of local cultural centers has shown a downward trend, dropping from 44 % in 2004, to 43.8% in 2006 and 40.8% in 2007. Meanwhile, the Ulsan Cultural Center in 2008 exhibited a relatively higher operating rate than other local areas (67%). The operating rate of local cultural centers in Seoul, Incheon and Jeju also exceeded 60%.

Table 3-1 Operating Rate of Venues in Local Cultural Centers

Classification	Average Operating Rate (%)			
	2008	2007	2006	2004
Overall	38.5	40.8	43.8	44.0

2) State of Performance

23,808,434 audiences took in a total of 31,667 works, preference for the theater genre (including musicals)

As mentioned above, a total of 732 performing arts facilities were recorded. In this regard, the 927 venues analyzed totaled 31,667 works (average 34.2 works performed) staged for 96,761 days (average 104.4 days) on 154,991 occasions (167.2 times on average) in front of a total of 23,808,434 audiences (average 25,683.3 audiences).

Analyzing the state of performances by genre, the average number of works staged was estimated at 42.8 for Western music, 13.0 for theater, and 12.6 for multi-genre. The average number of performance days and frequency were estimated at 96.7 days (122.2 times) for theater, and 31.3 days (34.1 times) for Western music. The average number of audiences was estimated at 18,507.9 audiences for theater and 16,828.7 audiences for western music.

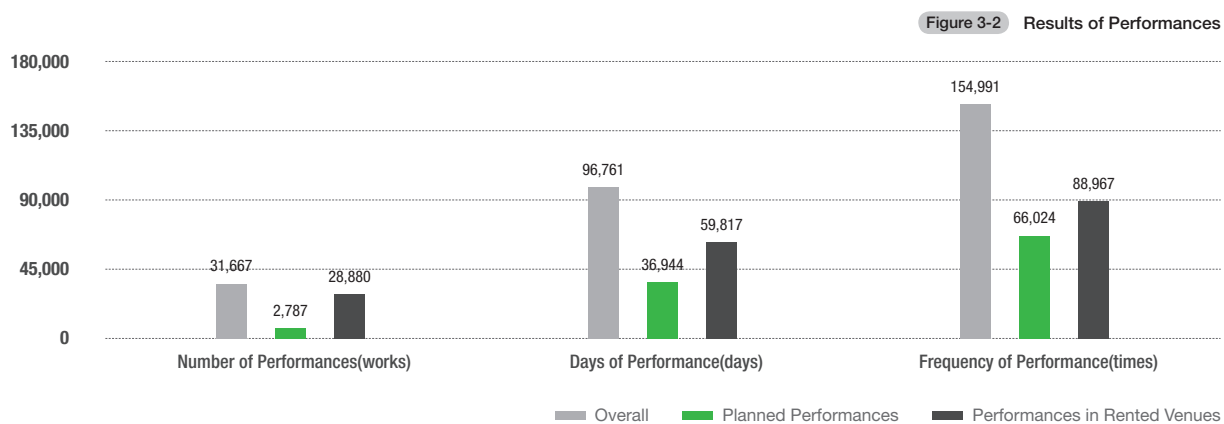


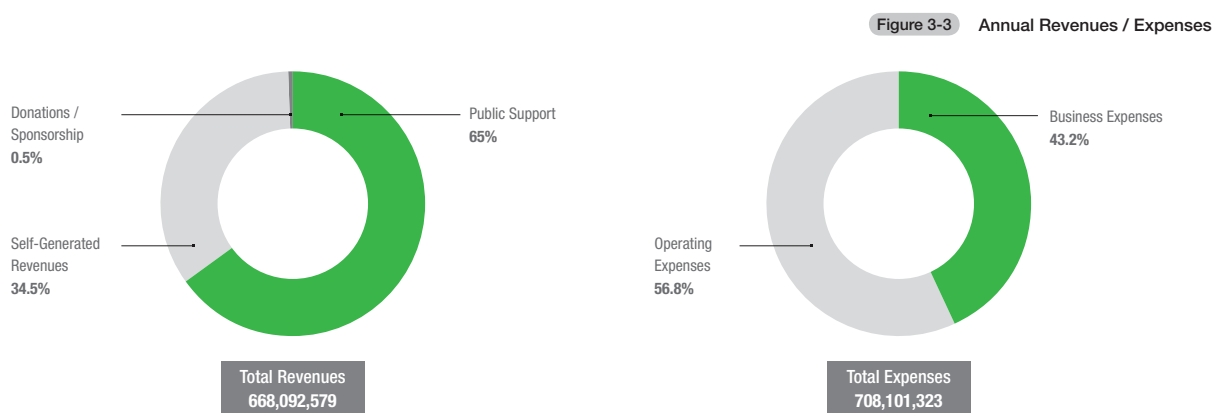
Table 3-2 Results of Planned and Performances in Rented Venues

	Number of Works		Days		Frequency		Number of Audiences	
	Sum (works, %)	Average (works)	Sum (days, %)	Average (days)	Sum (times, %)	Average (times)	Sum (audiences, %)	Average (audiences)
Overall	31,667(100)	34.2	96,761(100)	104.4	154,991(100)	167.2	23,808,434(100)	25,683.3
Planned Performance	2,787(8.8)	3.0	36,944(38.2)	39.3	66,024(42.6)	71.2	8,006,724(33.6)	8,637.2
Performance in Rented Venues	28,880(91.2)	31.2	59,817(61.8)	64.5	88,967(57.4)	96.0	15,801,710(66.4)	17,046.1

3. Finance

1) Financial Structure

The annual revenues garnered by performing arts facilities in 2008 were estimated at KRW 668.1 billion (average KRW 901 million). This can be broken down into self-generated revenues (34.5%, KRW 230.4 billion), public support (65.0%, KRW 434.1 billion), and donations /sponsorship (0.5%, KRW 3.6 billion). Total annual expenses estimated at KRW 708.1 billion (average KRW 970 million). As such, a high dependency on public support is evident.



2) Financial Self-Reliance Ratio (Performing Arts Facilities)

Financial self-reliance ratio averaged 31.5%. The financial self-reliance ratio of local cultural centers was estimated at 18.9%, which marked an increase over the 17.2% recorded in 2007.

Table 3-4 Financial Self-Reliance Ratio of Local Cultural Centers

Classification	Number of Facilities	Financial Self-Reliance Ratio of Local Cultural Centers (%)			
		2008	2007	2006	2004
Total	158	18.9	17.2	18.9	15.4
Area					
Seoul	13	44.1	56.7	59.2	34.1
Busan	6	27.0	19.6	23.1	24.2
Daegu	8	32.4	26.7	21.9	15.2
Incheon	4	13.0	14.4	18.0	17.2
Gwangju	4	23.6	22.4	32.6	40.6
Daejeon	2	20.7	10.1	10.7	8.3
Ulsan	2	12.8	15.3	16.1	3.7
Gyeonggi	24	22.0	20.7	20.8	23.8
Gangwon	13	8.1	8.7	8.7	5.7
Chungbuk	9	3.2	4.6	5.7	5.4
Chungnam	12	7.0	10.5	7.4	10.0
Jeonbuk	13	25.3	10.8	10.5	14.1
Jeonnam	13	7.7	11.2	12.1	6.0
Gyeongbuk	18	21.0	6.3	7.1	10.8
Gyeongnam	16	13.9	17.5	18.9	17.9
Jeju	1	7.4	4.1	7.9	1.6

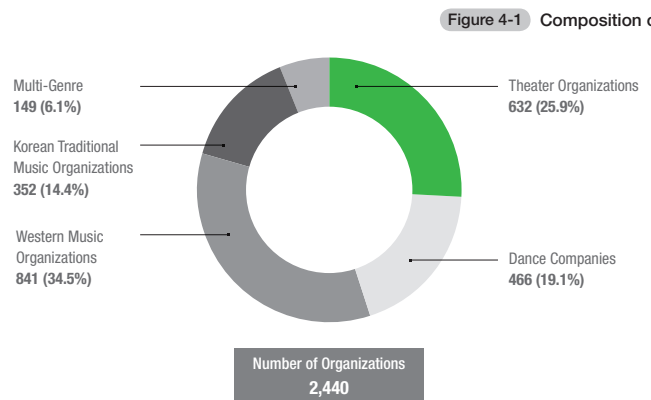
Performing Arts Organizations

1. Current State

1) Number and Local Ratio of Performing Arts Organizations¹

The total number of domestic performing arts organizations in 2008 was estimated at 2,440, with the majority concentrated in large cities and the capital area. Over half were located in metropolitan cities (1,487, 60.9%), and in particular in Seoul, Gyeonggi, and Incheon (1,387, 56.8%). From the standpoint of genres, the most popular were western music organizations (841, 34.5%), theater organizations (632, 25.9%), and dance companies (466, 19.1%).¹

¹ The genres conducted by performing arts organizations can be broken down into theater (theater, musical), dance (dance, ballet), music (Western music, opera), Korean traditional music and multi-genre.



2. Operation

1) The State of Performance

The total number of works performed by overall performing arts organizations (2,440) was estimated at 24,327 (average 10.0 works per organization). These performance were staged an estimated 93,933 (average 38.5 times per performance), with 27,078,437 audiences (average 11,097.7 audiences per performance) taking them in.

Table 4-1 Results of Performing Arts Organizations (estimated)

Classification	Number of Performances			Days of Performance			Frequency of Performance			Number of Audiences		
	Sum (cases)	Ratio (%)	Average (cases)	Sum (cases)	Ratio (%)	Average (days)	Sum (cases)	Ratio (%)	Average (times)	Sum (cases)	Ratio (%)	Average (audiences)
Overall	24,327	100	10	75,890	100	31.1	93,933	100	38.5	27,078,437	100	11,097.7
Planned Performance	13,100	53.8	5.4	51,888	68.4	21.3	66,059	70.3	27.1	14,863,785	54.9	9,091.7
Participation in Events and Invited Performances	11,227	46.2	4.6	24,002	31.6	9.8	27,874	29.7	11.4	12,214,652	45.1	5,006.0

2) Performance According to Genre

While Western music exhibited the highest number of works performed (average 9.0), the highest number of performance days (average 54.4 days) and frequency of performance (average 75.5 times) was recorded by theater. Meanwhile, multi-genre attracted the most audiences (11,499.8 audiences). This was followed by theater (10,119.3 audiences) and Korean traditional music (8,375 audiences).

Figure 4-2 Results of Performing Arts Organizations by Genre

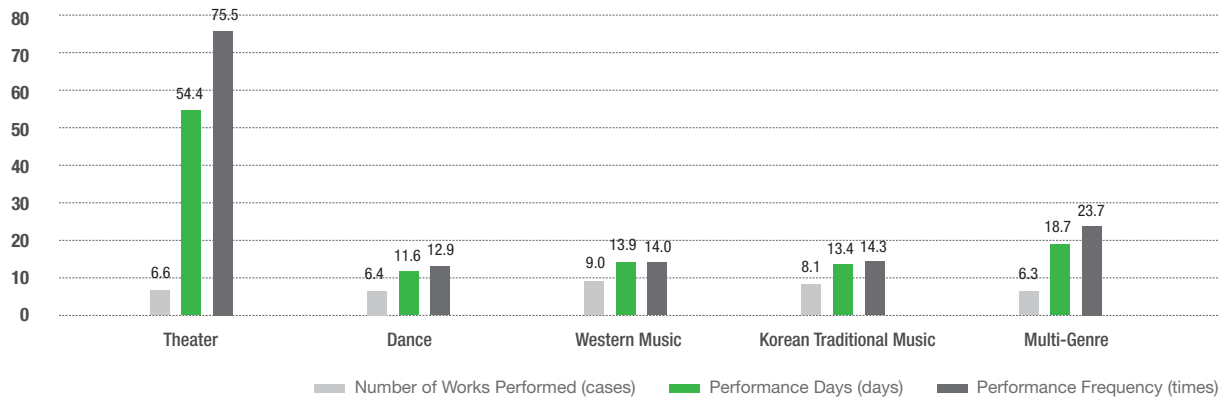


Table 4-2 Average Number of Audiences by Genre

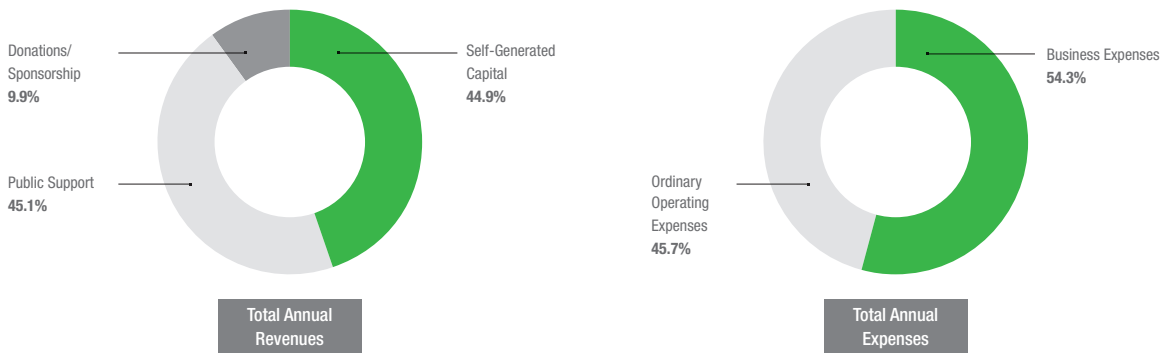
Classification	Number of Organizations	Overall (average)		Planned Performance (average)		Participation in Events and Invited Performances (average)		
		Total Number of Audiences	Ratio of Paid Audiences (%)	Total Number of Audiences	Ratio of Paid Audiences (%)	Total Number of Audiences	Ratio of Paid Audiences (%)	
Overall	719	8,761.2	31.3	7,128.7	35.8	5,176.3	18.5	
Genre	Theater	199	10,119.3	42.6	9,344.0	46.9	5,262.3	17.0
	Dance	102	6,421.3	35.5	4,617.9	43.2	5,116.6	20.8
	Western Music	190	7,640.2	29.6	5,342.2	35.1	5,059.7	19.2
	Korean Traditional Music	142	8,375.3	21.0	6,649.8	19.1	4,396.1	25.2
	Multi-Genre	86	11,499.8	20.5	9,907.4	25.1	7,436.5	7.2

3. Finance

1) Financial Structure

The total annual revenues of performing arts organizations were estimated at approximately KRW 516.8 billion (average KRW 210 million). 44.9 % (KRW 232.2 billion) of this amount came in the form of self-generated capital, 45.1% (KRW 233.3 billion) as public support and 9.9% (KRW 51.2 billion) in donations/ sponsorship. The total annual expenses of performing arts organizations were estimated at approximately KRW 640.6 billion (average KRW 260 million). 54.3% (KRW 347.8 billion) of this amount was set aside for business expenses and 45.7% (KRW 292.9 billion) for ordinary operating expenses.

Figure 4-3 Composition of the Total Revenues/Expenses



In terms of total revenues and expenses by genre, theater organizations were found to exhibit higher ratios (KRW 410 million/ KRW 440 million) than the other genres. Meanwhile the overall average for Western music organizations was KRW 330 million, with an average KRW 310 million in revenues and KRW 380 million in expenses recorded.

Figure 4-4 Total Annual Revenues by Genre (average)

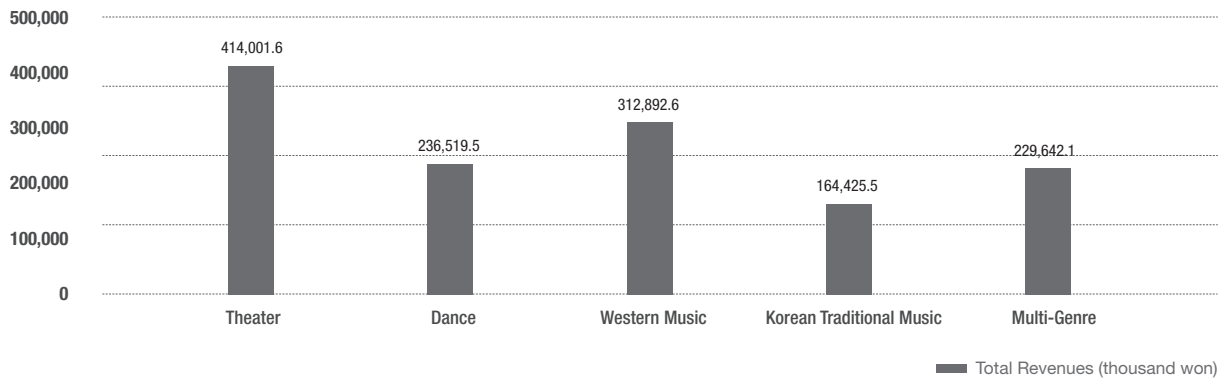
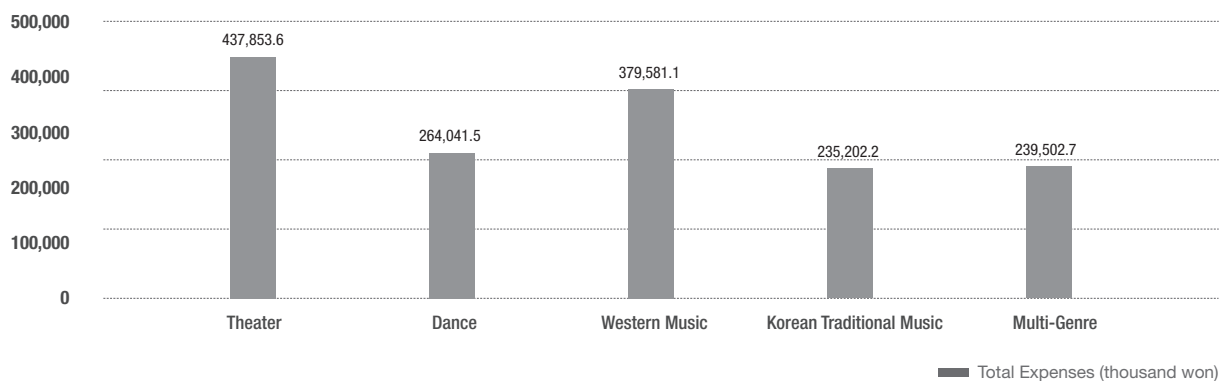


Figure 4-5 Total Annual Expenses by Genre (average)



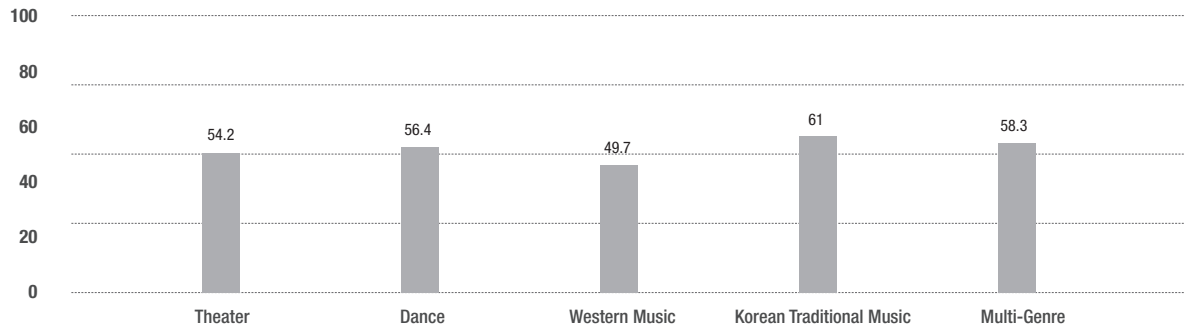
2) Financial Self-Reliance Ratio (Performing Arts Organizations)

The ratio of financial self-reliance was estimated at 55.3%. More to the point, while the financial independence of national and public organizations was estimated at 20.1%, that of private organizations was measured at 56.6%. Viewed from the standpoint of genre, Korean traditional music organizations recorded a rate of 61.0%, multi-genre organizations 58.3% and dance companies 56.4%.

Table 4-3 Financial Self-Reliance Ratio by Category Facilities

Classification		Number of Organizations	Average of Financial Self-Reliance Ratio
Overall		600	55.3
Genre	Theater	182	54.2
	Dance	89	56.4
	Western Music	142	49.7
	Korean Traditional Music	115	61.0
	Multi-Genre	72	58.3
Character	Public	29	20.1
	Private	527	56.6
	Non-Response	44	63.2

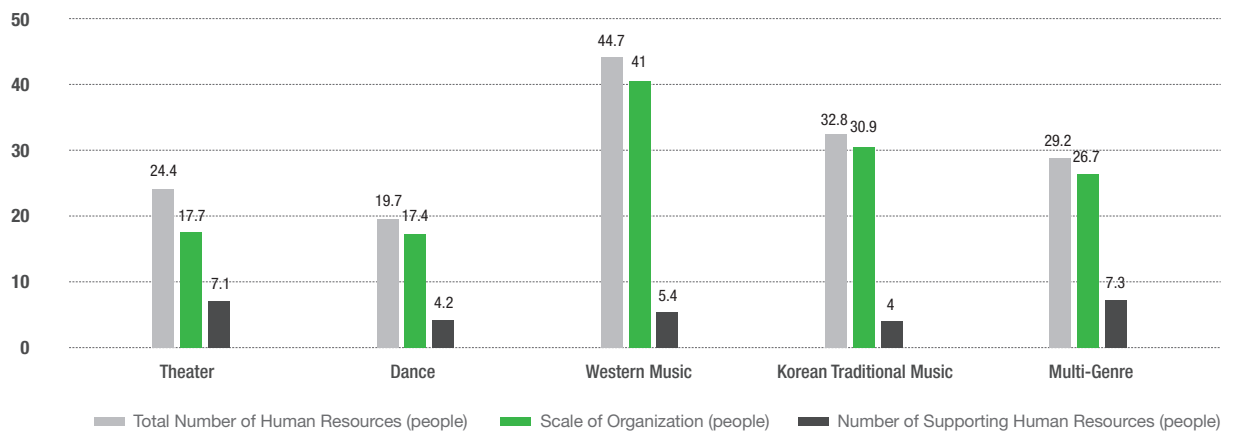
Figure 4-6 Financial Self-Reliance Ratio by Genre



4. Employee

A look at the average number of human resources in performing organizations by genre reveals that the greatest number of human resources (44.7 people) and biggest organization (41.0 people) was associated with Western music organizations. Meanwhile, the greatest average number of supporting human resources (average 7.3 people) was associated with multi-genre organizations.

Figure 4-7 Number of Human Resources by Genre (average)



2009 Survey of the Performing Arts (based on 2008)

Korea Arts Management Service

The Korea Arts Management Service (KAMS), established in January 2006, is a branch organization of the Ministry of Culture, Sports and Tourism, Republic of Korea. KAMS offers multifaceted assistance in international exchanges, human resources training, research, and consultancy for arts groups and art organizations in order to promote more effective arts management in Korea.
<http://eng.gokams.or.kr>

Publication

English Version

Published by Korea Arts Management Service

Planned and Edited by Saemee KIM

Translated by Somang Translation

Designed by Baseline (www.baseline.co.kr)

Date of Publication December 2012

The English version in 2012 is reprinted by summarizing the Korean publication of 2009.

Korean Version

Supported by Ministry of Culture, Sports and Tourism, Republic of Korea (www.mcst.go.kr)

Published by Korea Arts Management Service

Researchers

Seung Yep LEE (Korea National University of Arts, Professor)

Chan Doo KIM (Korea Arts Management Service, Director of Planning Dept.)

Pyoungki PARK (Korea Arts Management Service, Manager)

Geneuk LIM (Korea Arts Management Service)

Joo Hee JEON (Korea Arts Management Service)

Se Jung LEE (Research Assistant)

Bo Ra KIM (Research Assistant)

Implementation of Survey Dongseo Research, the Seoul Theater Association

Date of Publication December 2009