2022 BROADCASTING INDUSTRY WHITE PAPER

SUMMARY

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SUMMARY

Part 1 Scale of the Broadcasting Industry

1) Overall status of the broadcasting industry

Sales from the broadcasting industry[1)] in 2021 approximately reached KRW 23 trillion and 970.7 billion, increasing by 9.1%, which is equivalent to KRW 2 trillion and 6 billion. The average annual growth rate from 2017 to 2021 was 7.4%. The number of businesses in the broadcasting industry in 2021 was estimated to be about 1,133, 5.9% increase from the previous year, and the average annual growth rate for the past five years, from 2017 to 2021, was 1.8%. The number of workers engaged in the broadcasting industry was 50,160, 0.2% decrease from the previous year. The annual average growth rate of the workers between 2017 to 2021 was 2.6%.

The cost of exports in the broadcasting industry in 2021 reached USD 717.99 million, a 3.6% increase from the previous year. The average annual increase from 2017 to 2021 was 18.6%. Meanwhile, the cost of 2021 imports reached USD 60.76 million, a 0.3% decrease from the previous year. The average annual growth rate from 2017 to 2021 was -13.8%, which continues to reflect a downward trend.

Table 1 Broadcasting Industry Overview

Type	No. of Businesses (EA)	No. of Workers (Person)	Sales Revenue[2)] (KRW 1 Mil.)	Exports (USD 1,000)	Imports (USD 1,000)
2017	1,054	45,337	18,043,595	362,403	110,196
2018	1,148	50,286	19,762,210	478,447	106,004
2019	1,062	51,006	20,843,016	539,214	97,366
2020	1,070	50,239	21,964,721	692,790	60,969
2021	1,133	50,160	23,970,709	717,997	60,762
YoY Growth Rate(%)	**5.9**	**△0.2**	**9.1**	**3.6**	**△0.3**
Average Annual Growth Rate(%)	**1.8**	**2.6**	**7.4**	**18.6**	**△13.8**

1) The broadcasting industry sales include the broadcasting business sales in terrestrial broadcasting, cable broadcasting, satellite broadcasting, program providers, and online content providers, as well as the sales of independent broadcasting content providers.

2) Sales status of the broadcasting industry by sector

The field of terrestrial broadcasting includes both terrestrial broadcasting business providers and terrestrial digital mobile broadcasting (DMB) providers. As of 2021, there were 68 businesses under terrestrial broadcasting, with approximately 13,670 workers. The overall sales revenue of terrestrial broadcasting was KRW 3 trillion and 993.1 billion; the average sales by business was KRW 58.7 billion; and the average sales by the worker was KRW 300 million. The cable TV business is divided into system operators and relay operators, and, as of 2021, there were 113 businesses with 4,505 workers. The total sales revenue of the cable TV business was KRW 1 trillion and 854.7 billion; the average sales by business was KRW 16.4 billion; and the average sales by the worker was KRW 400 million. The satellite broadcasting business involved one company, KT SkyLife, with 379 workers. Its total sales revenue was KRW 521 billion, and its average sales by the worker were KRW 1.4 billion.

Table 2 Average Sales Revenue Status of the Broadcasting Industry by Business and by Worker (2021)

Type		No. of Businesses (EA)	No. of Workers (Person)	Sales Revenue		Average Sales by Business (KRW 1 Mil.)	Average Sales by Worker (KRW 1 Mil.)
				(KRW 1 Mil.)	(%)		
Terrestrial Broadcasting	Terrestrial Broadcasting Provider	50	13,627	39,882	16.6	798	3
	DMB Provider[3)4)]	18	43	49	0.0	3	1
	Subtotal	**68**	**13,670**	**39,931**	**16.6**	**587**	**3**
Cable TV	System Operator	90	4,456	18,542	7.7	206	4
	Relay Operator5)[5)]	23	49	5	0.0	0	0
	Subtotal	**113**	**4,505**	**18,547**	**7.7**	**164**	**4**
Satellite Broadcasting	General Satellite Broadcasting Provider[6)]	1	379	5,210	2.2	5,210	14
Program Provider	Program Provider	180	17,119	75,520	31.5	420	4
Online Content	Internet Protocol TV(IPTV)	3	919	46,368	19.3	15,456	50

2) Based on broadcasting business sales

Type		No. of Businesses (EA)	No. of Workers (Person)	Sales Revenue		Average Sales by Business (KRW 1 Mil.)	Average Sales by Worker (KRW 1 Mil.)
				(KRW 1 Mil.)	(%)		
Provider	IPTV Content Provider (CP)[7]	36	-	8,440	3.5	234	-
	Subtotal	**39**	**919**	**54,808**	**22.8**	**1,405**	**60**
Broadcasting Content Production	Independent Broadcasting Content Producer	732	13,568	45,691	19.1	62	3
Total		**1,133**	**50,160**	**239,707**	**100.0**	**146**	**3**

As of 2021, there were 180 program providers with 17,119 workers, and the overall sales revenue was KRW 7 trillion and 552 billion. The average sales per business were KRW 42 billion, and the average sales by the worker were KRW 400 million. The online content provider business consists of internet protocol TV (IPTV) and the IPTV content provider (CP) business. Under this category are 39 businesses, including three IPTV providers with 919 workers.

As of 2021, the overall sales revenue was KRW 5 trillion and 480.8 billion, and the average sales by the worker were KRW 140.5 billion. Lastly, there are 732 independent broadcasting content producers, with 13,568 workers. The overall sales revenue of independent broadcasting content producers was KRW 4 trillion and 569.1 billion; the average sales by business was KRW 6.2 billion; and the average sales by the worker was KRW 300 million.

3) The number of DMB businesses includes three terrestrial broadcasting companies (KBS, MBC, and SBS), 13 local terrestrial broadcasting companies, YTNDMB, Yuwon Media, and Korea DMB.
4) The number of workers and the sales revenue of the DMB business only include YTNDMB and Korea DMB. Yuwon Media was shut down in 2021, so it is not included in the 2021 data.
5) A total of 23 relay operators were included in the survey, excluding those registered with the Ministry of Science and ICT that no longer operate or are out of business. A total of 19 operators participated in the survey.
6) As of 2021, the number of program providers includes 10 terrestrial broadcasting companies with the same terrestrial corporation (SBS, CBS, Catholic Peace Broadcasting Corporation, Traffic Broadcasting System TBS, Korea International Broadcasting Foundation, EBS, Buddhist Broadcasting System, Far East Broadcasting Company, Won Buddhism Broadcasting System, and Gukak FM), and two companies that have the same corporation as terrestrial DMB businesses (Korea DMB and YTNDMB).
7) With the amendment of the Broadcasting Act (Dece Average Sales Revenue Status of the Broadcasting Industry by Business and by Worker Dec 15. 2015, internet multimedia broadcasting providers have submitted their property status to the Korea Communications Commission. The sales of IPTV CP were quoted [The Broadcasting Company's Property Status Announcement] by the Korea Communications Commission.

(1) Terrestrial broadcasting

Terrestrial broadcasting is largely divided into TV broadcasting, radio broadcasting, terrestrial mobile multimedia broadcasting (MMB), and digital multimedia broadcasting (DMB). As of 2021, terrestrial broadcasting accounted for 17.1% of the total broadcasting industry.

Table 3 Sales Status of the Terrestrial Broadcasting Business[8)]

Primary Classification	Secondary Classification	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)[9)]	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Terrestrial Broadcasting	TV Broadcasting	3,215,075	3,300,306	3,711,664	93.0	12.5	7.4
	Radio Broadcasting	299,692	264,850	275,628	6.9	4.1	△4.1
	MMB	1,997	1,320	951	0.0	△28.0	△31.0
	DMB[10)]	9,480	7,569	4,894	0.1	△35.3	△28.1
	Subtotal	**3,526,244**	**3,574,045**	**3,993,137**	**100.0**	**11.7**	**6.4**

The total sales revenue of the terrestrial broadcasting business was KRW 3 trillion and 993.1 billion, which is an 11.7% increase from the sales revenue of KRW 3 trillion and 574 billion from the previous year. TV broadcasting sales increased by 12.5% to KRW 3 trillion and 711.7 billion, while radio broadcasting sales increased by 4.1% to KRW 275.6 billion. Both MMB and DMB continued to show a downward trend, with MMB sales decreasing to KRW 1 billion, a 28.0% decrease from the previous year, and DMB sales showing a continuous downtrend to KRW 4.9 billion, a 35.3% decrease from the previous year.

In terms the terrestrial broadcasting business sales, the average annual growth rate for the past three years has shown a steady increase at 6.4%, and it showed significant sales growth in 2021. This attributes to the 12.5% growth

8) Broadcasting business sales only

9) As the ratio is presented in units of one decimal place, there may be a difference in the total for each division.

10) The DMB business data only include YTNDMB, Yuwon Media, and Korea DMB, excluding that of the three terrestrial broadcasting companies (KBS, MBC, and SBS) and 13 local terrestrial broadcasting companies. The DMB-related sales revenue of 16 terrestrial broadcasting companies is included in the terrestrial broadcasting business according to the criteria for making a list of sales for a business corporation unit.

rate between 2020 and 2021 in TV broadcasting sales in the terrestrial broadcasting business. On the other hand, terrestrial MMB showed a 31.0% annual average sales decrease over the past three years, the largest reduction in sales volume, and DMB providers also experienced a 28.1% drop in annual average sales over the past three years.

Table 4 Sales Composition of Terrestrial Broadcasting Providers and DMB Providers

Type			2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Terrestrial Broadcasting Provider		Broadcast Service Fee11)	1,060,577	1,108,885	1,125,347	24.0	1.5	3.0
		Advertisement Sales	1,099,928	1,001,343	1,209,718	25.8	20.8	4.9
		Sponsorship Sales	376,767	385,257	409,733	8.7	6.4	4.3
		Program Sales	708,902	781,900	904,934	19.3	15.7	13.0
		Other Broadcasting Business Sales	270,590	289,115	338,512	7.2	17.1	11.8
	Broadcasting Business Sales		3,516,765	3,566,500	3,988,243	85.0	11.8	6.5
	Other Business Sales		704,768	639,903	702,026	15.0	9.7	△0.2
	Subtotal		**4,221,534**	**4,206,403**	**4,690,269**	**100.0**	**11.5**	**5.4**
DMB Provider		Advertisement Sales	1,821	1,534	1,295	23.1	△15.6	△15.7
		Sponsorship Sales	1,009	976	900	16.1	△7.8	△5.6
		Program Sales	162	223	173	3.1	△22.4	3.3
		Other Broadcasting Business Sales	6,486	4,837	2,527	45.1	△47.8	△37.6
	Broadcasting Business Sales		9,480	7,570	4,894	87.3	△35.4	△28.1
	Other Business Sales		428	457	712	12.7	55.8	29.0
	Subtotal		**9,909**	**8,026**	**5,606**	**100.0**	**△30.2**	**△24.8**
Total Sales of Broadcasting Business			**3,526,244**	**3,574,070**	**3,993,137**	**-**	**11.7**	**6.4**

11) Terrestrial broadcast service fees: TV broadcast service fee + re-transmission sales + broadcast program provision sales

The detailed sales composition of the terrestrial broadcasting providers and DMB providers are aggregated in the same way, except for the broadcast service fee of the terrestrial broadcasting provider. The sales revenue of terrestrial broadcasting was KRW 4 trillion and 690.3 billion an 11.5% increase from the previous year. The broadcast service fees consist of the sum of the TV broadcasting reception fees, re-transmission sales broadcasting program sales. As of 2021, the broadcast service fees from the terrestrial broadcasting business were recorded as KRW 1 trillion and 125.3 billion, comprising 24.0% of total sales, reflecting a 1.5% YoY increase. Advertisement sales were KRW 1 trillion and 209.7 billion, 25.8% of the total sales and showing a 20.8% increase from the previous year. This accounted for the largest portion of the sales of terrestrial broadcasting providers, while the average annual growth rate for the past three years from 2019 to 2021 was 4.9%. Sponsorship sales accounted for 8.7% of the total sales and recorded KRW 409.7 billion, a 6.4% increase from the previous year, and an average increase of 4.3% in the past three years. The revenue from program sales was KRW 90.49 billion, 19.3% of the total sales, reflecting a 15.7% increase from the previous year. In total, the sales revenue of the broadcasting business increased by 11.8% YoY to KRW 3 trillion and 988.2 billion. In contrast, the sales of other businesses were KRW 702 billion, a 9.7% increase of the prior year, but it has been repeating its ups and downs lately.

The total sales revenue of DMB providers amounted to KRW 5.6 billion, a big drop of 30.2% from the previous year's sales. The advertisement revenue was KRW 1.3 billion, 23.1% of the total revenue, showing a 15.6% reduction of the prior year. The advertisement sales of DMB providers have decreased annually by 15.7% from 2019 to 2021, showing a continuous downward trend. Sponsorship sales decreased by 7.8% YoY to KRW 900 million, 16.1% of the total sales. It has steadily decreased by 5.6% on average in the past three years. The revenue from program sales was KRW 200 million, which was a 22.4% YoY decrease, and the sales of other broadcasting businesses were KRW 2.5 billion, a 47.8% drop from the previous year, showing the largest negative growth among those of the broadcasting business sales. The total sales revenue of the broadcasting business decreased by 35.4% to KRW 4.9 billion, while the sales of other businesses increased by 55.8% to KRW 700 million. The DMB sales recorded an overall decline in all areas except for the sales of other broadcasting businesses, maintaining a steady downward trend.

(2) Cable TV

As of 2021, cable TV makes up 7.9% of the broadcast industry business. Cable TV is composed of the system operator and the relay operator. The sales of the system operator make up most of the overall cable TV sales.

The total sales revenue of cable TV is KRW 1 trillion and 854.7 billion, a 4.1% decrease from the previous year's KRW 1 trillion and 934 billion. The sales achieved by the system operator were KRW 1 trillion and 854.2 billion, a 4.1% decrease from the previous year, and that of the relay operator was KRW 543 million, a 55.1% YoY decrease. As of 2021, the system operator's broadcasting business sales over the past three years decreased by an average of 4.3%. In the case of the relay operator, the downtrend has exacerbated with the average annual decrease of 40.5%, and the decline is increasing every year. The broadcasting business sales of cable TV continued to drop overall, and the sales of the relay operator were markedly reduced, compared to that of the system operator.

Table 5 Sales Status of Cable TV[12)]

Primary Classification	Secondary Classification	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)[13)]	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Cable TV	System Operator	2,022,703	1,932,839	1,854,154	100.0	△4.1	△4.3
	Relay Operator	1,535	1,209	543	0.0	△55.1	△40.5
	Subtotal	2,024,238	1,934,048	1,854,697	100.0	△4.1	△4.3

12) Broadcasting business sales only.
13) As the ratio is presented in units of one decimal place, there may be a difference in the total for each division.

The total sales of the system operators were KRW 2 trillion and 713.8 billion, a 2.1% decrease from the previous year. Broadcasting business sales, which accounted for 68.3% of the total revenue, decreased by 4.1% YoY, while other business sales, which accounted for 31.7% of the total revenue, increased by 2.5% from the previous year. The sales of system operators continued the downtrend of the total sales from 2019. The broadcast service fee sales amounted to KRW 650.9 billion, 24.0% of the total sales, and decreased by 7.9% from the previous year. Advertisement sales recorded KRW 109 billion, which is 4.0% of the total sales, and it decreased by 4.8% from the previous year. The sponsorship sales amounted to KRW 2.3 billion, a 16.0% YoY decrease and 0.1% of the total sales. Infomercial broadcast fee revenues reached KRW 747 billion or 27.5% of total sales, an increase of 0.2% from the previous year. On the other hand, the revenue from subscription and facility installation increased with a 2.8% YoY increase to KRW 12.3 billion, or 0.5% of the total sales. The sales of terminal device rental (sales) decreased by 5.5% YoY to KRW 329.6 billion. The average annual growth rate of subscription and facility installation sales for the past three years was 27.4%, maintaining the largest increase. The sales of terminal device rental (sales) decreased by an average of 4.5% annually, continuing the downtrend. The sales from other broadcasting businesses showed a 4.2% increase from the previous year to KRW 3 billion, but it had the largest drop in sales in the growth rate over the past three years.

The total sales revenue of the relay operator amounted to KRW 3 billion, a 17.8% decrease from the previous year. The broadcasting business sales decreased by 55.1% YoY to KRW 500 million or 17.9% of the total sales, while other businesses increased by 0.4% YoY to KRW 2.5 billion or 82.1% of the total sales. The average growth rate for broadcasting businesses in the past three years was 40.5%, continuing a rapid downtrend and the other business sales decreased by 2.5%. Among cable relay broadcasting sales, the sales from other businesses are at most 4.5 times that of the broadcasting business, making broadcasting sales not the main source of revenue.

Table 6 Sales Composition of System Operators and Relay Operators

Type		2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
System Operator	Broadcast Service Fee	762,929	706,536	650,889	24.0	△7.9	△7.6
	Advertisement Sales	135,544	114,539	109,012	4.0	△4.8	△10.3
	Sponsorship Sales	3,027	2,794	2,346	0.1	△16.0	△12.0
	Informercial Broadcast Fee	746,832	745,218	747,001	27.5	0.2	0.0
	Subscription and Installation	7,582	11,965	12,303	0.5	2.8	27.4
	Device Rental (Sales)	361,062	348,914	329,610	12.1	△5.5	△4.5
	Other Broadcasting Business Sales	5,725	2,873	2,995	0.1	4.2	△27.7
	Broadcasting Business Sales	2,022,703	1,932,839	1,854,154	68.3	△4.1	△4.3
	Other Business Sales	906,774	839,035	859,678	31.7	2.5	△2.6
	Subtotal	**2,929,478**	**2,771,874**	**2,713,832**	**100.0**	**△2.1**	**△3.8**
Relay Operator	Broadcasting Business Sales	1,535	1,209	543	17.9	△55.1	△40.5
	Other Business Sales	2,619	2,478	2,489	82.1	0.4	△2.5
	Subtotal	**4,154**	**3,688**	**3,031**	**100.0**	**△17.8**	**△14.6**
Total Sales of Broadcasting Business		**2,024,238**	**1,934,048**	**1,854,697**	-	**△4.1**	**△4.3**

(3) Satellite TV

Satellite broadcasting has been only providing general satellite broadcasting services since the satellite mobile multimedia broadcasting business ended in 2012. As of 2021, satellite broadcasting accounted for 2.2% of the broadcasting industry, and its sales decreased by 2.2% from the previous year to KRW 521 billion. Over the past three years, the sales revenue showed an average annual reduction of 2.5%.

Table 7 Sales Status of the Satellite Broadcasting Business[14)]

Primary Classification	Secondary Classification	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Satellite Broadcasting	General Satellite Broadcasting	548,512	532,788	520,983	100.0	△2.2	△2.5

14) Broadcasting business sales only

The total sales of satellite broadcasting operators were KRW 655.4 billion, a 0.8% decrease from the previous year. Broadcasting business sales accounted for 79.5% of the total sales revenue of satellite broadcasting, with an average annual drop of 2.5% for the past three years. The revenue of other businesses, which accounted for 20.5% of the total sales, was KRW 134.4 billion, a 16.2% increase from the previous year, maintaining the average annual increase of 10.6%. The revenue from broadcast service fees amounted to 44.6% of the total sales, accounting for the highest portion after recording KRW 292 billion in 2021. However, it decreased of 3.4% compared to the previous year. The advertisement revenue was 5.0% of the total sales, equivalent to KRW 33 billion, a 0.7% drop from the previous year, with an average annual growth rate of -18.8% in the past three years. The infomercial broadcast fee revenue amounted to 27.1% of the total sales, accounting for KRW 177.7 billion, a 1.1% YoY increase, with the average annual growth rate of 0.9% in the past three years, albeit slight. The subscription and installation sales decreased by 4.8% YoY to KRW 5.9 billion, 0.9% of the total sales, and the device rental (sales) sales drastically dropped by 20.6% from the previous year to KRW 11.8 billion, or 1.8% of the total sales, recording the largest downtrend. Other broadcasting business sales were only worth KRW 600 million, which was 0.1% of the total sales but showed a 1.0% growth compared to the previous year, with 13.0% of the annual average growth in the past three years.

Table 8 Sales Composition of the General Satellite Broadcasting Business

Type			2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
General Satellite Broadcasting Operator		Broadcast Service Fee	304,533	302,173	291,960	44.6	△3.4	△2.1
		Advertisement Sales	50,039	33,210	32,978	5.0	△0.7	△18.8
		Informercial Broadcast Fee	174,566	175,722	177,717	27.1	1.1	0.9
		Subscription and Installation	5,957	6,220	5,919	0.9	△4.8	△0.3
		Device Rental (Sales)	12,916	14,860	11,799	1.8	△20.6	△4.4

Type			2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
		Other Broadcasting Business Sales	478	604	610	0.1	1.0	13.0
	Broadcasting Business Sales		548,512	532,788	520,983	79.5	△2.2	△2.5
	Other Business Sales		109,784	127,615	134,371	20.5	5.3	10.6
	Subtotal		658,297	660,403	655,353	100.0	△0.8	△0.2

(4) Program provider

Program providers are responsible for producing and supplying programs to the pay broadcasting market. The sales, which account for 32.3% of the total broadcasting business sales, reached KRW 7 trillion and 552 billion, a 6.8% YoY increase as of 2021. Looking at the sales in the past three years, the average annual increase was 3.2%, continuing an uptrend.

Table 9 Sales Status of the Program Provider Business[15)]

Primary Classification	Secondary Classification	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Program Provider	Program Provider[16)]	7,091,840	7,074,233	7,551,968	100.0	6.8	3.2

The total sales revenue of a program provider's broadcast business and other businesses amounted to KRW 13 trillion and 483 billion, which is a 5.3% increase from the previous year. This is because the sales of other businesses recorded a 3.5% YoY increase to KRW 5 trillion and 931.1 billion. The sales of program providers' broadcasting businesses were KRW 7 trillion and 552 billion, which account for 56.0% of the total sales.

The sales revenue from broadcast service fees was KRW 939 billion, a 7.3% increase from the previous year. It recorded an average of 6.3% increase over the past three years, showing a continuous growth trend. Advertisement sales

15) Broadcasting business sales only.
16) The sales of the joint business with a program provider (nine terrestrial broadcasting companies and two DMB companies) were added to each joint business venture for calculation.

reached KRW 1 trillion and 691.2 billion, a 15.5% increase from the past year, with an average annual growth rate of 3.1% in the past three years, showing that it has been fluctuating. Sponsorship sales amounted to KRW 525.8 billion, a 22.7% increase from the previous year, with an average annual growth rate of 12.8% in the past three years. The revenue from the program sales accounted for 2.3% of the total sales and a 12.7% increase from the previous year to KRW 307.8 billion. The revenue from the broadcasting facility rental and events accounted for a very small portion of 0.1% and 0.3%, respectively. Event sales decreased by 3.4% compared to the previous year due to the impact of COVID-19, and the average annual growth rate for the past three years has plummeted to -35.1%. The infomercial broadcast fee sales, which account for the highest proportion of the sales of broadcast channel operators, as of 2021, were KRW 3 trillion and 819.3 billion, a 0.2% increase from the previous year. It steadily increased of 1.4% on average in the past three years. The sales of other broadcasting businesses were KRW 216.5 billion, a 25.4% increase from the previous year.

Table 10 Sales Composition of Program Provider Businesses

Type			2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Program Provider[17]		Broadcast Service Fee[18]	831,655	874,892	938,958	7.0	7.3	6.3
		Advertisement Sales	1,590,360	1,463,655	1,691,165	12.5	15.5	3.1
		Sponsorship Sales	413,202	428,343	525,781	3.9	22.7	12.8
		Program Sales	272,543	273,152	307,750	2.3	12.7	6.3
		Broadcasting Facility Rental	7,720	7,982	11,203	0.1	40.4	20.5
		Event Sales	98,142	42,785	41,316	0.3	△3.4	△35.1
		Informercial Broadcasting Sales	3,711,079	3,810,804	3,819,306	28.3	0.2	1.4
		Other Broadcasting Business Sales	167,136	172,610	216,488	1.6	25.4	13.8
	Broadcasting Business Sales		7,091,840	7,074,223	7,551,968	56.0	6.8	3.2
	Other Business Sales		5,685,949	5,729,592	5,931,062	44.0	3.5	2.1
Total			**12,777,790**	**12,803,815**	**13,483,030**	**100.0**	**5.3**	**2.7**

(5) Online content provider

In the broadcasting industry, online content providers are steadily recording high growth. Unlike the terrestrial broadcasting or cable TV markets, where sales are decreasing, the sales of online content providers have grown in the past three years. The total sales revenue of online content providers increased by 11.9% YoY to KRW 5 trillion and 480.8 billion, accounting for 23.4% of the total broadcasting business sales, and increased by an average of 10.6% in the past three years.

Online content providers consist of Internet protocol TV (IPTV) and IPTV content providers (CP). IPTV accounts for 19.8% of the total broadcasting business sales. As of 2021, the total revenue amounted to KRW 4 trillion and 636.8 billion, an increase of 8.2% from the previous year. IPTV CP accounted for 3.6% of the broadcasting business sales revenue, increasing by 37.7% from the previous year to KRW 844 billion. The average sales in the past three years have increased by 9.6% and 16.3%, respectively, with a growth rate of IPTV CP.

Table 11 Sales Status of Online Content Providers[19)]

Primary Classification	Secondary Classification	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Online Content Provider	Internet Protocol TV(IPTV)	3,856,648	4,283,590	4,636,819	84.6	8.2	9.6
	IPTV Content Provider (CP)	624,210	613,064	843,999	15.4	37.7	16.3
	Subtotal	**4,480,858**	**4,896,654**	**5,480,818**	**100.0**	**11.9**	**10.6**

The total sales of IPTV operators amounted to KRW 34 trillion and 719.2 billion, a 2.5% increase from the previous year. Among them, broadcasting business sales were 13.4% of the total sales, while other businesses were 86.6%,

17) The sales of program providers excluded nine terrestrial broadcasting businesses and two companies with the same corporation as DMB companies.

18) Program provider's broadcast service fee = Broadcasting program provision sales

19) Broadcasting business sales only.

at KRW 30 trillion and 82.4 billion. The broadcast service fee sales increased by 4.3% to KRW 2 trillion and 715.1 billion, an average increase of 5.6% in the past three years. Advertising revenue was KRW 107.1 billion, a 4.0% increase from the previous year, and infomercial broadcast fees reached KRW 1 trillion and 324.3 billion, a 19.5% increase from the previous year. The sales of subscription and facility installation and device rental (sales) were KRW 53.4 billion and KRW 372.2 billion, respectively. The subscription and facility installation sales increased by 8.0% from the previous year, and the average annual growth in the last three years was 0.8%. The sales from device rentals (sales) increased by 5.8% YoY, and the average sales in the last three years also increased by 15.0%.

The total sales of IPTV CP amounted to KRW 2 trillion and 283.3 billion, of which the broadcast business revenue was KRW 844 billion, which is 37.0% of the total. The sales from broadcast program provision reached KRW 75.4 billion, a 27.2% YoY drop. Sponsorship sales were KRW 5.1 billion, up by 120.6% from the previous year. The broadcast program provision sales, which comprise the highest portion of 24.9% among IPTV CP broadcasting business sales, reached KRW 567.8 billion, a 68.6% increase from the previous year. The revenue from other businesses was KRW 195.6 billion, a 14.8% increase from the previous year.

Table 12 Sales Composition of IPTV and IPTV CP

Type			2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Internet Protocol TV (IPTV)		Broadcasting Service Fee	2,434,799	2,602,654	2,715,070	7.8	4.3	5.6
		Advertisement Sales	123,240	102,908	107,056	0.3	4.0	△6.8
		Infomercial Broadcasting Fee	906,417	1,108,578	1,324,280	3.8	19.5	20.9
		Subscription and Installation	52,548	49,465	53,399	0.2	8.0	0.8
		Device Rental (Sales)	281,342	351,915	372,158	1.1	5.8	15.0

Type			2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
		Other Broadcasting Business Sales	58,300	68,070	64,856	0.2	△4.7	5.5
	Broadcasting Business Sales		3,856,648	4,283,590	4,636,819	13.4	8.2	9.6
	Other Business Sales		30,240,640	29,575,845	30,082,380	86.6	1.7	△0.3
	Subtotal		34,097,288	33,859,436	34,719,200	100.0	2.5	0.9
IPTV Content Provider (CP)		Broadcasting Program Provision	85,277	103,567	75,403	3.3	△27.2	△6.0
		Sponsorship Sales	757	2,322	5,123	0.2	120.6	160.1
		Broadcasting Program Sales	350,449	336,819	567,828	24.9	68.6	27.3
		Other Broadcasting Business Sales	187,726	170,356	195,646	8.6	14.8	2.1
	Broadcasting Business Sales		624,210	613,064	843,999	37.0	37.7	16.3
	Other Business Sales		2,004,583	1,346,192	1,439,284	63.0	6.9	△15.3
	Subtotal		2,628,794	1,959,256	2,283,283	100.0	16.5	△6.8
Total Sales of Broadcasting Business			**4,480,858**	**4,896,654**	**5,480,818**	-	**11.9**	**10.6**

(6) Broadcasting content production

Broadcasting content production includes independent broadcasting content producers, and its sales as of 2021 accounted for 19.1% of the total broadcasting business. Its sales revenue reached KRW 4 trillion and 569.1 billion, a 15.6% increase from the previous year, with an average increase of 20.0% in the last three years.

Table 13 Sales Status of Broadcasting Content Production

Primary Classification	Secondary Classification	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Broadcasting Content Production	Independent Broadcasting Content Producer	3,171,316	3,952,961	4,569,106	100.0	15.6	20.0

3) Broadcast advertising sales[20)]

The total revenue of broadcast advertising in 2021 was KRW 3 trillion and 151.2 billion, a 16.0 increase from the previous year. In 2021, broadcast advertising sales increased by 20.8% YoY to KRW 1 trillion and 209.7 billion. The broadcast advertising sales of terrestrial broadcasters have shown a continuous decline, but sales increased in 2021, resulting in an annual average increase of 4.9% over the past three years. Those cable TV decreased by 4.8% from the previous year to KRW 109 billion, with an average annual growth rate of -10.3% over the past three years. The broadcast advertising sales of satellite broadcasting increased by 2.4% from the previous year to KRW 33 billion, with an average annual growth rate of -18.8% over the past three years. Those of program providers increased by 15.5% from the previous year to KRW 1 trillion and 691.2 billion, showing an average annual growth rate of 3.1% over the past three years. The broadcast advertising sales of IPTV increased by 4.0% from the previous year to KRW 107.1 billion, with an average annual growth rate of -6.8% over the past three years. Only DMB operators and system operators showed a decline in ad sales. The terrestrial broadcasting business rebounded in advertising sales only in 2021.

Table 14 Advertising Sales by Broadcasting Medium

Type	2019 (KRW 1 Mil.)	2020 (KRW 1 Mil.)	2021 (KRW 1 Mil.)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Terrestrial Broadcasting Provider	1,099,928	1,001,343	1,209,718	38.4	20.8	4.9
DMB Provider[21)]	1,821	1,534	1,295	0.0	△15.6	△15.7
System Operator	135,544	114,539	109,012	3.5	△4.8	△10.3
Satellite Broadcasting	50,039	32,210	32,978	1.0	2.4	△18.8
Program Provider	1,590,360	1,463,655	1,691,165	53.7	15.5	3.1
Internet Protocol TV(IPTV)	123,240	102,910	107,056	3.4	4.0	△6.8
Total	**3,000,932**	**2,716,191**	**3,151,223**	**100.0**	**16.0**	**2.5**

20) As the sales are rounded to the nearest KRW 100,000, there may be differences in the total for each division.

Looking at the share of advertising revenue by broadcasting medium, the ratio of advertising sales by program providers is 53.79%, taking up the largest proportion, while that of terrestrial broadcasting businesses is 38.4%, a slight increase from the previous year. The advertising sales of the terrestrial broadcasting business accounted for 50.4% of total broadcast advertising sales as of 2016. However, the sales declined by 12.0%p in 2021, while program providers accounted for 41.9% of the market share in 2016, and increased by 11.8%p in 2020.

4) Pay TV subscriber status

Pay TV subscribers were estimated at 35.77 million as of 2021, a 2.8% increase compared to the previous year. The average annual growth rate for the past three years has been 2.9%, confirming the moderate growth of the pay TV market.

The pay TV subscribers are divided into system operators and relay operators. As of 2021, system operator subscribers decreased by 1.9% from the previous year to 12.88 million. The subscribers who left due to the termination of analog cable broadcasting did not resubscribe to cable broadcasting. 8VSB is a transmission method that allows analog cable broadcast subscribers to watch digital broadcasts, while pay TVs provide an 8VSB digital converter that allows subscribers to watch digital broadcasts without changing the rate plan. The number of 8VSB subscribers was 5.77 million in 2021, a decrease of 1.1% from the previous year. QAM subscribers decreased by 2.5% from the previous year to 7.11 million. The number of subscribers for relay broadcasting was 12,000 in 2021. The number of subscribers decreased by 65.4% from the previous year with an average annual growth rate of -47.9% over the past three years, showing a very low level of service.

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21) Among DMB providers, the advertisement sales of MMB providers affiliated with terrestrial broadcasters (KBS, MBC, and SBS) are included in terrestrial broadcast advertising sales.

Table 15 Pay TV Subscriber Status

Type			2019 (Person)	2020 (Person)	2021 (Person)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Cable TV	System Operator		13,475,595	13,129,858	12,878,502	36.0	△1.9	△2.2
		Analog	19,424	3,409	0	0.0	△100	△100
		8VSB[22]	5,960,710	5,835,913	5,770,965	16.1	△1.1	△1.6
		QAM[23]	7,495,461	7,290,536	7,107,537	19.9	△2.5	△2.6
	Relay Operator		45,971	36,101	12,488	0.0	△65.4	△47.9
	Subtotal		**13,521,566**	**13,165,959**	**12,890,990**	**36.0**	**△2.1**	**△2.4**
Internet Protocol TV (IPTV)[24]	Real-time IPTV		17,125,034.5	18,537,192.5	19,891,198	55.6	7.3	7.8
Satellite Broadcasting[25]			3,168,016.5	3,082,073.5	2,991,322	8.4	△2.9	△2.8
Total			**33,814,617**	**34,785,225**	**35,773,510**	**100.0**	**2.8**	**2.9**

Internet Protocol TV (IPTV) counts only real-time subscribers. As of 2021, there were 19.89 million IPTV subscribers, an increase of 7.3% from the previous year, with an average annual growth rate of 7.8% over the past three years. In the total pay TV market, IPTV accounts for 55.6%, and cable TV accounts for 36.0%. The market share of IPTV in the pay TV market is more than half, continuing to dominate cable TV since 2017.

As of 2021, the number of general satellite broadcasting subscribers is about 2.99 million, accounting for 8.4% of the total pay TV market. The number of general satellite broadcasting subscribers decreased by 2.9% compared to the previous year, and the average annual growth rate for the past three years was -2.8%.

22) 8VSB (8-level Vestigial Sideband) is a transmission method used for digital terrestrial broadcasting. If an existing analog cable broadcasting subscriber shifts to 8VSB, high-definition digital broadcasting can be viewed without a separate digital set-top box (no two-way service available). Since 2015, when it was separated from analog, investigations have begun.
23) QAM (Quadrature Amplitude Modulation) is a transmission method used in digital cable broadcasting and provides features, such as broadcasting and two-way communication through a set-top box.
24) In the case of IPTV, only real-time IPTV subscribers are targeted, excluding Pre-IPTV subscribers.
25) In the case of IPTV and satellite broadcasting, OTS (satellite and IPTV combined product, short for Olleh TV Skylife) subscribers in 2015 were distributed in half to each operator, based on KT and KT Skylife subscribers.

Looking at the pay TV subscriber trend shows that analog broadcasting services have virtually ended. Following the end of the analog broadcasting service of terrestrial broadcasting on December 31, 2012, the analog broadcasting service of a system operator can be considered completed 10 years later. Since 2017, the government has promoted the termination of analog broadcasting services, and subscribers have moved to other services. The increase in real-time IPTV subscribers is the only one showing an increase, securing more than one million subscribers annually.

Part 2 Overall Status of Broadcasting Workers

1) General status of broadcasting industry workers

As of 2021, there were 50,160 workers involved in the broadcasting industry, a decrease of 0.2% from the previous year. The number of workers in the broadcasting industry has been in a plateau, with an average annual growth rate of -0.8% in the past three years. Regarding individual operators, program providers were at the highest portion of 34.1% of the total workers, terrestrial broadcasting providers at 27.2%, independent broadcasting content providers at 27.0%, and system operators at 8.9%.

In terms of the status of workers by field, the number of workers in terrestrial broadcasting decreased by 1.4% to 13,670 as of 2021, compared to the previous year. Among them, the number of terrestrial broadcasting providers was 13,627, a 1.4% decline from the previous year, while that of DMB providers was 43, the same as the previous year. There were 4,456 cable TV workers, a 5.4% YoY decrease. There were 4,456 system operator workers, a 5.4% decrease from the previous year, and 49 relay operator workers, a 22.2% YoY decrease. There were 379 general satellite broadcasting workers, a 1.6% YoY decrease, and 17,119 program provider workers, a 0.8% decrease from the previous year. There were 919 IPTV workers, a 7.6% YoY increase, and the number of independent broadcasting content production workers was 13,568, a 3.5% increase from the previous year. The number of workers in the broadcasting industry increased compared to the previous year were IPTV and independent broadcasting content production, showing that the polarization phenomenon continues in the trend among workers.

Table 16 Worker Status in the Broadcasting Industry by Field and by Year

Primary Classification	Secondary Classification	2019 (Person)	2020 (Person)	2021 (Person)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate (%)
Terrestrial Broadcasting	Terrestrial Broadcasting Provider	14,458	13,827	13,627	27.2	△1.4	△2.9
	DMB Provider	61	43	43	0.1	0.0	△16.0
	Subtotal	14,519	13,870	13,670	27.3	△1.4	△3.0
Cable TV	System Operator	4,587	4,712	4,456	8.9	△5.4	△1.4
	Relay Operator	76	63	49	0.1	△22.2	△19.7
	Subtotal	4,663	4,775	4,505	9.0	△5.7	△1.7
Satellite TV	General Satellite Broadcasting Provider	376	385	379	0.8	△1.6	0.4
Program Provider[26)]	Program Provider	17,181	17,249	17,119	34.1	△0.8	△0.2
Online Content Provider	IPTV	814	854	919	1.8	7.6	6.3
Broadcasting Content Production	Independent Broadcasting Content Producer	13,453	13,106	13,568	27.0	3.5	0.4
Total		51,006	50,239	50,160	100.0	△0.2	△0.8

In terms of the broadcasting industry worker by field, the growth rate of IPTV is most pronounced, with an average increase of 6.3% in the past three years. Satellite broadcasting and independent broadcasting content production companies have shown an annual average increase of 0.4% over the past three years. Yet, satelite broadcasting operators are in a stagnant period, while independent broadcasting content production companies are repeatedly fluctuating under the influence of the broadcasting market environment. Cable TV providers recorded an average annual growth rate of -1.7% for the past three years. The number of system operator workers has been decreasing for the past three years at 1.4%, as well as that of relay operator workers has been decreasing for the same period at 19.7% for the past three years, continuing the downtrend among workers. The number of terrestrial broadcasting workers

26) The number of program provider workers in the joint business with other broadcasting businesses, including nine companies sharing the same corporation as terrestrial broadcasting companies and two companies sharing the same corporation as DMB operators, is included in the number of terrestrial broadcasting and DMB workers.

averaged a 2.9% decrease over the past three years, with the DMB workers dropping by 16.0%. It shows that the decrease in the number of workers in the terrestrial broadcasting business by 831 over the past three years had the most significant effect on the reduction of terrestrial broadcasting workers.

Part 3 The Status of the Broadcasting Industry's Exports and Imports

1) The status of the broadcasting industry's exports and imports[27)]

The volume of exports and imports in the broadcasting industry is the sum of the imports and exports from terrestrial broadcasting, program providers, and independent broadcasting content producers. As of 2021, exports of broadcasting contents were worth USD 718 million, a 3.6% increase from the previous year. Imports were worth USD 60.76 million, a 0.3% decrease from the previous year.

In terms of the average annual growth rate in the past three years, exports steadily increased, recording an average annual growth rate of 15.4%. However, imports decreased by 21.0% since 2019 with a continuous decline.

Table 17 The Status of Exports and Imports of the Broadcasting Industry

Type	2019 (USD 1,000)	2020 (USD 1,000)	2021 (USD 1,000)	YoY Growth Rate (%)	Average Annual Growth Rate(%)
Exports	539,214	692,790	717,997	3.6	15.4
Imports	97,366	60,969	60,762	△0.3	△21.0
Difference	441,848	631,822	657,236	4.0	22.0

2) Status of exports by broadcasting business

In terms of the exports by broadcasting businesses, independent broadcasting content production accounted for the highest proportion of 39.7%, followed by program providers at 30.6%, and terrestrial broadcasting at 29.7%. However,

27) The amounts of imports and exports of the broadcasting industry are calculated by aggregating the amount indicated in the factual survey of the broadcasting industry and the factual survey of independent broadcasting content producers, so the added total and the individual total may be slightly different. Also, the amounts are rounded up at a USD100 per unit, so the total in each field may differ.

in the past three years, the exports of terrestrial broadcasting operators continue to show a moderate trend of a slight increase overall, while the exports of program providers show large increases and decreases. The exports of independent broadcasting content production have maintained a steep upward trend for the past three years.

The exports of terrestrial broadcasting amounted to USD 213.33 million as of 2021, a 2.3% increase from the previous year, with an average annual increase of 10.0% during the past three years. The exports from program providers increased to USD 219.9 million, a 22.3% YoY decrease, and the average annual growth rate was 7.4% in the past three years. Exports from independent broadcasting content productions were USD 284.77 million, a 41.5% YoY increase, and a 28.6% average annual growth rate has continued in the past three years.

Table 18 Status of Exports of the Broadcasting Industry

Medium	Year	2019 (USD 1,000)	2020 (USD 1,000)	2021 (USD 1,000)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate(%)
Terrestrial Broadcasting	Broadcasting Program Sales	126,709	130,046	142,865	19.9	9.9	6.2
	Broadcasting Support for Overseas Korean	522	362	338	0.0	△6.6	△19.5
	Video & DVD Sales	550	216	241	0.0	11.8	△33.8
	Time Block Sales	34,431	30,745	29,913	4.2	△2.7	△6.8
	Format Sales	6,917	7,096	9,969	1.4	40.5	20.1
	Others	7,333	40,080	30,001	4.2	△25.1	102.3
	Subtotal	**176,462**	**208,545**	**213,326**	**29.7**	**2.3**	**10.0**
Program Provider	Broadcasting Program Sales	175,576	225,068	193,980	27.0	△13.8	5.1
	Broadcasting Support for Overseas Korean	394	597	95	0.0	△84.1	△50.9
	Video & DVD Sales	0	3	0	0.0	-	-
	Time Block Sales	133	186	350	0.0	88.2	62.2
	Format Sales	6,732	5,787	4,939	0.7	△14.7	△14.3
	Others	7,843	51,353	20,541	2.9	△60.0	61.8

Medium \ Year		2019 (USD 1,000)	2020 (USD 1,000)	2021 (USD 1,000)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate(%)
	Subtotal	**190,678**	**282,995**	**219,904**	**30.6**	**△22.3**	**7.4**
Subtotal of TB and PP		367,141	491,539	433,230	60.3	△11.9	8.6
Independent Broadcasting Content Production		172,073	201,251	284,767	39.7	41.5	28.6
Total		**539,214**	**692,790**	**717,997**	**100.0**	**3.6**	**15.4**

Exports are largely divided into six categories: broadcasting program sales, broadcasting support for overseas Korean content[28)], video and DVD sales, time block sales[29)], format sales[30)], and others[31)], as terrestrial broadcasting and program providers tally their export revenues accordingly. However, independent broadcasting content productions are not included in this classification, and the overall export revenue is calculated separately.

Exports from terrestrial broadcasting programs were USD 142.8 million as of 2021, a 9.9% YoY increase, which amounted to 19.9% of the total exports. Broadcasting support for overseas Korean content from terrestrial broadcasting amounted to USD 340,000, a 6.6% decrease from the previous year. Video and DVD sales reached USD 240,000, an 11.8% increase from the previous year. The time block sales reached USD 29.91 million, a 2.7% YoY decrease, which amounted to 4.2% of the total terrestrial broadcasting exports. The format sales amounted to USD 9.97 million, a 40.5% increase from the previous year, and other exports were USD 30 million, a 25.1% decrease from the previous year.

The exports of program providers were worth USD 193.98 million, a 13.8% decrease from the previous year, which was also 27.0% of the total exports. The exports of broadcasting support for overseas Korean content were USD 90,000, an 84.1% drop from the previous year. There were no exports of video

28) Broadcasting support for overseas Korean content refers to the selling of videos or VODs of Korean programs without dubbing or subtitles for Koreans overseas, and government support for subtitle or dubbing work.
29) Time block sales refer to selling time slots for broadcast programs from Korean broadcasters to a foreign broadcaster at specific times.
30) A format is the specification from which a program is made of, and unique formats have copyrights that can be subject to trade.
31) Others refer to exports other than the broadcasting support for Koreans overseas, video and DVD sales, time block, formats, and broadcasting programs (finished product).

and DVD sales in 2021, and time block sales were USD 350,000, an 88.2% increase from the previous year, while the exports of format sales were USD 4.94 million, a 14.7% decrease from the previous year. The exports of other formats were USD 20.54 million, a 60.0% decrease from the previous year. For program providers, it showed a decline in exports in all sectors except for time block sales, compared to the previous year.

Exports from independent broadcasting content productions have been increased steadily after exceeding USD 200 million in 2020. As of 2021, exports from independent broadcasting content productions recorded USD 284.77 million, a 41.5% increase from the previous year and accounted for 39.7% of the total broadcasting industry exports.

3) Status of imports by broadcasting business

In terms of the imports from the broadcasting business, program providers accounted for the overwhelming portion at 93.6%, followed by terrestrial broadcasting at 6.3%, and from independent broadcasting content producers at 0.1%. Imports from terrestrial broadcasts amounted to USD 3.83 million as of 2021, a 6.0% decrease from the previous year. The average annual growth rate of imports in the past three years was 2.6%, an uptrend. Imports from program providers were USD 56.89 million, a 2.9% YoY increase. The average annual growth rate of imports in the past three years was 21.9%. Imports from independent broadcasting content producers were worth USD 40,000, a 97.4% decline from the previous year, and the average annual growth rate was recorded as -65.3% in the past three years.

Imports are divided into broadcasting programs, video/DVD sales, formats, and other productions. Terrestrial broadcasting has not disclosed details of its earnings since 2014, and in the case of independent broadcasting content producers, only the total import amount is counted. Only the program providers provided detailed data for each sector.

Imports from terrestrial broadcasting amounted to USD 3.69 million, a 9.5% decrease from the previous year, and the average annual growth rate in the past three years was 0.7%. The format imports of terrestrial broadcasting in 2021 were worth USD 150,000.

Looking at the imports from program providers, those from broadcasting programs were USD 55.93 million, a 1.6% increase from the previous year, with an average annual growth rate of -22.0% in the past three years. There was no revenue from video/DVD sales. Those from format businesses were worth USD 490,000, a 161.4% YoY decrease, with an average annual growth rate of 25.2% over the past three years. The imports of other productions were worth USD 470,000, a whopping increase of 840% from the previous year.

Imports from independent broadcasting content productions seemed to plummet in 2019, and then rebounded in 2020. However, imports dropped to USD 40,000 in 2021, and continued a pronounced downtrend decline with an average annual growth rate of -65.3% over the past three years.

As imports by broadcasting businesses significanlty fluctuated as they were highly affected by changes in the broadcasting environment, imports of terrestrial broadcasting and program provider businesses showed a common tendency to decrease.

Table 19 Status of Imports of the Broadcasting Industry

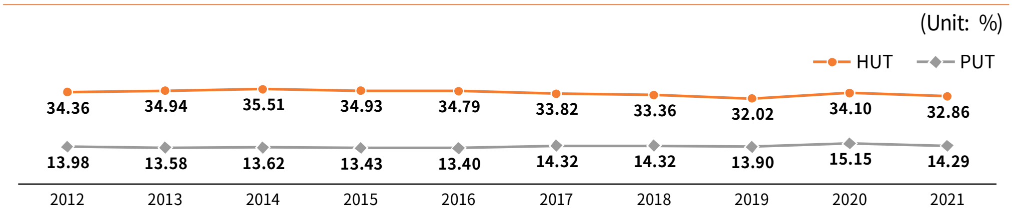
Medium \ Year		2019 (USD 1,000)	2020 (USD 1,000)	2021 (USD 1,000)	Ratio (%)	YoY Growth Rate (%)	Average Annual Growth Rate(%)
Terrestrial Broadcasting	Broadcasting Program	3,636	4,074	3,685	6.1	△9.5	0.7
	Format	0	0	145	0.2	-	-
	Subtotal	**3,636**	**4,074**	**3,830**	**6.3**	**△6.0**	**2.6**
Program Provider	Broadcasting Program	91,827	55,066	55,925	92	1.6	△22.0
	Vide/DVD Sales	1,227	0	0	0.0	-	△100.0
	Format	315	189	494	0.8	161.4	25.2
	Others	12	50	470	0.8	840.0	525.8
	Subtotal	**93,381**	**55,305**	**56,889**	**93.6**	**2.9**	**△21.9**
Independent Broadcasting Content Production		349	1,590	42	0.1	△97.4	△65.3
Total		**97,366**	**60,969**	**60,761**	**100.0**	**△0.3**	**△21**

Part 4 TV Ratings Analysis

1) Households Using Television (HUT) and People Using Television (PUT) by year

In 2021, households using television (HUT) recorded 32.86%, a 1.24%p drop from the previous year, and people using television (PUT) also decreased by 0.85%p to 14.29%. This is because outdoor activities, which were limited due to the spread of COVID-19 in 2020, increased in 2021, and as time spent at home decreased, TV viewing time also decreased. Interestingly, the cumulative number of confirmed cases per year in 2020 was about 60,000. However, the cumulative number of confirmed cases in 2021 increased nearly 10 times to 570,000 as the fear stemming from COVID-19 decreased after the launch of the disease management system.

Figure 1 HUT and PUT Trends by Year



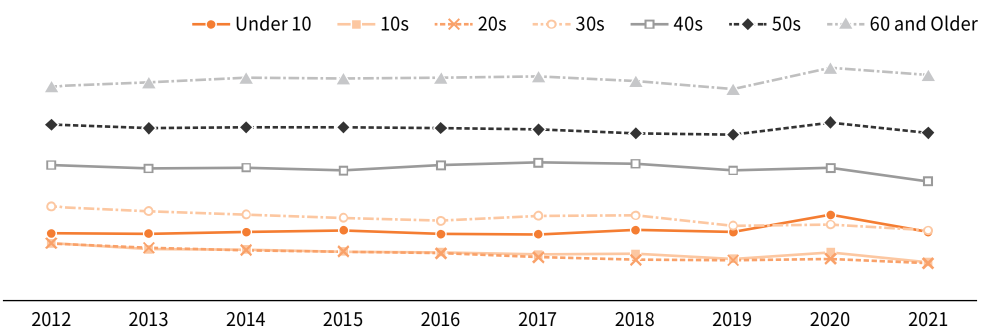
Source: Nielsen Company Korea, TV Ratings (All households, all platforms, national)

2) PUT by age

The TV ratings by age in 2021 also decreased in all age groups, like the overall HUT and PUT. Teenagers recorded 4.43%, a 1.16%p drop from the previous year, and 7.89% for those under 10 years of age, a 1.98%p reduction. Unlike in 2020, when remote classes were held due to COVID-19, TV ratings decreased in these age groups when face-to-face classes resumed. Those in their 40s recorded 13.71%, a decrease of 1.57%p, 8.08% of those in their 30s, a decrease of 0.68%p, 19.30% of those in their 50s, and 25.99% of those in their 60s or older, a decrease of 0.83%p. Those in their 20s showed a 0.52% decrease with the least change to 4.31%. Though the TV ratings that increased due to COVID-19 decreased in all age groups in 2021, the decrease and increase in TV ratings among those in their 10s and 40s, have decreased compared to before the spread of COVID-19 (2019). The ratings in their 50s to 60s and older, who recorded higher TV ratings than the previous level, appeared to differ.

Figure 2 PUT Trends by Age

(Unit: %)



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Under 10	7.73	7.71	7.88	8.09	7.67	7.61	8.11	7.88	9.87	7.89
10s	6.61	5.92	5.87	5.65	5.57	5.30	5.39	4.82	5.59	4.43
20s	6.60	6.07	5.81	5.65	5.44	4.99	4.68	4.65	4.83	4.31
30s	10.82	10.29	9.91	9.52	9.17	9.76	9.81	8.63	8.76	8.08
40s	15.61	15.22	15.31	14.95	15.59	15.89	15.76	14.99	15.28	13.71
50s	20.26	19.83	19.95	19.94	19.88	19.68	19.28	19.08	20.51	19.30
60 and Older	24.65	25.13	25.69	25.61	25.66	25.80	25.28	24.38	26.82	25.99

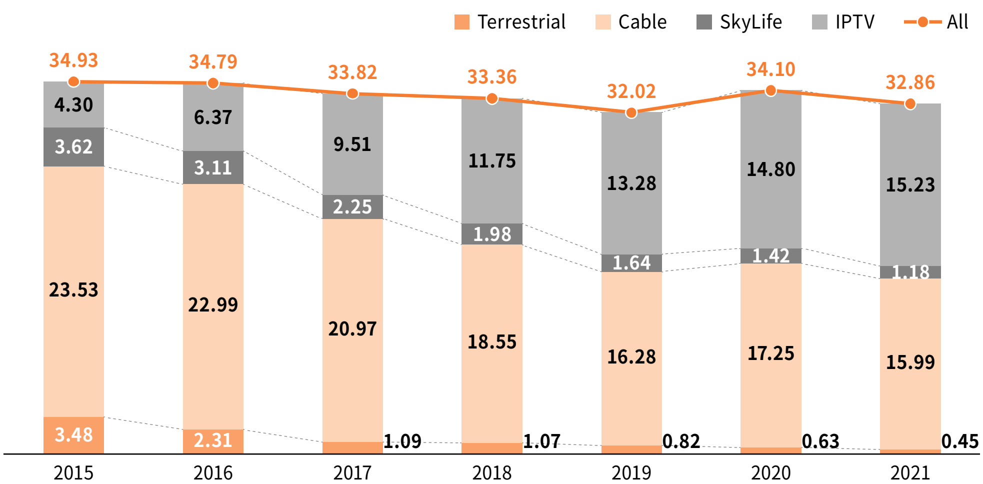
Source: Nielsen Company Korea, TV Ratings (All households, all platforms, national)

3) Ratings by platform

TV ratings by platform does not analyze the TV ratings of individual channels, but the total amount of TV viewing through a specific platform. From 2015 to 2021, HUT by TV viewing platform has failed to maintain the increase in 2020, and recording 32.86% in 2021, a decline 1.24%p from the previous year. Except for a 0.43%p increase in TV viewing through IPTV platforms compared to the previous year, HUT for all platforms decreased, and TV viewing through cable TV showed a 1.26%p decrease from the previous year.

Figure 3 Comparison of the Share of Domestic Broadcasting Platforms by Export Country (2020-2021)

(Unit: %)



Source: Nielsen Company Korea, TV Ratings (All households, all platforms, national)

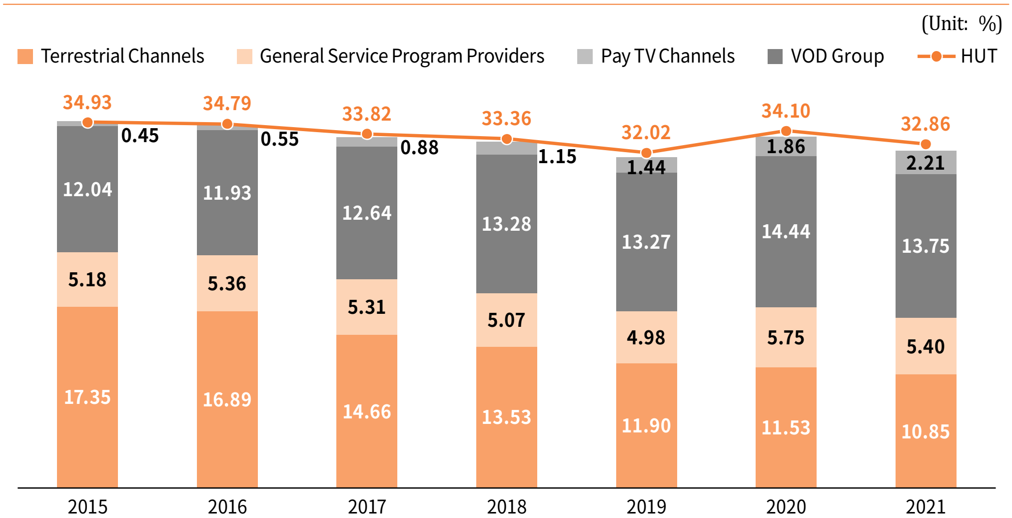
These results indicate that overall TV viewing is moving from a broadcasting-oriented platform (terrestrial, cable, satellite) to internet protocol television, IPTV. So far, cable platforms have recorded higher TV ratings than other platforms, but in 2021, the gap narrowed considerably as the ratio of TV viewing through IPTV increased. Based on this trend, the most viewed broadcasting platform will likely to change to IPTV in 2022.

4) TV ratings by channel

To find out the TV ratings by channel group from 2015 to 2021, channels were divided into four major categories. Terrestrial channels include local broadcasting companies of KBS1, KBS2, and MBC, as well as EBS, SBS, and local private broadcasters. Moreover, four general service program providers (JTBC, MBN, TV CHOSUN, and Channel A), pay TV companies (other PP channels), VOD (non-real-time service) were calculated.

The total TV ratings of terrestrial channels were 10.85%, a 0.68%p decrease from the previous year; those of general service program providers were 5.40%, a 0.35%p drop from the previous year; and pay TV channels were 13.75%, a 0.68%p drop from the previous year. On the other hand, VOD accounted for 2.21%, a 0.34%p increase from the previous year. The TV ratings of general service program providers and pay TV channels, increased slightly in 2020, and decreased again in 2021. The TV ratings of all real-time channels decreased, while VOD viewing increased to the 2% level compared to the previous year.

Figure 4 Annual HUT by Channel



Source: Nielsen Company Korea, TV Ratings (All households, all platforms, national)

2022
广播影像
产业白皮书

摘 要

第1节 广播影像产业规模

1) 广播影像产业总体现状

2021年韩国广播影像产业的销售额[1)2)]为23.9707兆韩元，比上年增加2兆60亿韩元，增长了9.1%。2017年至2021年的年均增长率为7.4%。截至2021年，韩国广播影像产业企业数为1,133家，比上年增长5.9%，2017年至2021年近五年年均增长率为1.8%。从业人员数为50,160人，比上年减少0.2%。2017年至2021年，从业人员数年均增长率为2.6%。

2021年韩国广播影像产业出口额达到7.1799亿美元，比上年增长3.6%。2017年至2021年的年均增长率为18.6%。2021年进口额为6,076万美元，比上年下降0.3%。2017年至2021年，进口额年平均下降了13.8%，持续呈下降趋势。

表 1 广播影像产业概况

年度	企业数(家)	从业人员数(人)	销售额[3)](百万韩元)	出口额(千美元)	进口额(千美元)
2017年	1,054	45,337	18,043,595	362,403	110,196
2018年	1,148	50,286	19,762,210	478,447	106,004
2019年	1,062	51,006	20,843,016	539,214	97,366
2020年	1,070	50,239	21,964,721	692,790	60,969
2021年	1,133	50,160	23,970,709	717,997	60,762
同比增长率(%)	**5.9**	**△0.2**	**9.1**	**3.6**	**△0.3**
年均增长率(%)	**1.8**	**2.6**	**7.4**	**18.6**	**△13.8**

2) 各广播影像产业领域的销售额

地面波广播包括地面波广播电视运营商和地面波移动多媒体广播电视(DMB)运营商。2021年，地面波广播的企业总数为68家，从业人员总数为13,670人。地面波广播的广播业务销售总额为3.9931兆韩元，每家企业平均销售额为587亿韩元，人均销售额为3亿韩元。有线电视分为综合有线广播电视运营商和转播有线广播电视运营商。截至2021年，有线电视的企业总

1) 广播影像产业总体现状是使用韩国内容振兴院(2020)《2020年广播影像独立制作调查》和科学技术信息通讯部、广播通信委员会(2020)《2020年广播产业调查》的结果编制的。

2) 广播影像产业销售额包括地面波电视、有线电视、卫星广播、广播频道使用业务、互联网影像产品提供商的广播业务销售额以及广播影像独立制作公司的销售额。

3) 以广播业务销售额为准。

数为113家，从业人员总数为4,505人。有线电视的广播业务销售总额为1.8547兆韩元，每家企业平均销售额为164亿韩元，人均销售额为4亿韩元。卫星电视领域为KT Skylife一家企业，从业人员数为379人，总销售额为5,210亿韩元，人均销售额为14亿韩元。

表 2　广播影像产业每家企业和每名从业人员广播业务平均销售额(2021年)

类别		企业数(家)	从业人员数(人)	销售额		每家企业平均销售额(亿韩元)	人均销售额(亿韩元)
				(亿韩元)	(%)		
地面波广播	地面波广播电视运营商	50	13,627	39,882	16.6	798	3
	地面波移动多媒体广播电视运营商[4][5]	18	43	49	0.0	3	1
	小计	**68**	**13,670**	**39,931**	**16.6**	**587**	**3**
有线电视	综合有线广播电视运营商	90	4,456	18,542	7.7	206	4
	转播有线广播电视运营商[6]	23	49	5	0.0	0	0
	小计	**113**	**4,505**	**18,547**	**7.7**	**164**	**4**
卫星电视	卫星广播电视运营商	1	379	5,210	2.2	5,210	14
广播频道使用业务	广播电视频道使用商[7]	180	17,119	75,519	31.5	420	4
互联网影像供应业	互联网协议电视(IPTV)	3	919	46,368	19.3	15,456	50
	IPTV内容提供商(CP)[8]	36	-	8,440	3.5	234	-
	小计	**39**	**919**	**54,808**	**22.8**	**1,405**	**60**
广播影像制作业	广播影像独立制造商	732	13,568	45,691	19.1	62	3
总计		**1,133**	**50,160**	**239,707**	**100.0**	**146**	**3**

广播电视频道节目供应商截至2021年共180家，从业人员数为17,119人，广播业务销售总额为7.5520兆韩元。广播电视频道节目供应商每家企业平均销售额为420亿韩元，人均销售额为4亿韩元。互联网影像供应业由互联网协议电视(IPTV)和IPTV内容供应商(CP)组成。包括3家IPTV企业在内，互联网影像供应业的企业数为39家，以统计的3家IPTV企业为准，从业人员数为919人。

截至2021年，互联网影像供应业的广播业务销售总额为5.4808兆韩元，每家企业平均

4) 地面波移动多媒体广播电视运营商数包括了三大地面波广播公司(KBS，MBC，SBS)和13家地区地面波广播公司，YTN DMB、U1 MEDIA、韩国DMB。
5) 地面波移动多媒体广播电视运营商的从业人员数和销售额仅包括除兼业地面波的运营商之外的YTNDMB、韩国DMB。U1 MEDIA在2021年停业，因此2021年无法将其包括。
6) 转播有线广播电视运营商的企业数，在科学技术信息通信部登记的运营商中排除未运营或关闭的运营商后调查对象为23家，参与调查的企业数为19家。
7) 截至2021年，广播电视频道使用商的企业数包括包括与地面波相同的10家法人(SBS、CBS、天主教和平广播、首尔特别市媒体财团TBS、国际广播交流财团、EBS、佛教广播、远东广播、原音广播、国乐广播)以及与地面波DMB相同的2家法人(韩国DMB、YTNDMB)
8) 随着放送法的修正(2015年12月22日)，互联网多媒体广播电视运营商将财产状况提交至广播通信委员会。IPTV内容提供商(CP)业绩引用广播通信委员会的《广播电视运营商财产状况公布集》。

销售额为1,405亿韩元。广播影像独立制造商的企业数为732家，从业人员数为13,568名。广播影像独立制造商的广播业务销售总额为4.5691兆韩元，每家企业平均销售额为62亿韩元，人均销售额为3亿韩元。

(1) 地面波广播

地面波广播事业部门细分为电视广播、无线电广播、地面波广播公司下属多媒体广播以及地面波移动多媒体广播。地面波广播2021年在韩国广播影像产业中的所占比重为17.1%。

表 3　地面波广播的广播业务销售额9)

中分类	小分类	2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)10)	同比增长率(%)	年均增长率(%)
地面波广播	电视广播	3,215,075	3,300,306	3,711,664	93.0	12.5	7.4
	无线电广播	299,692	264,850	275,628	6.9	4.1	△4.1
	地面波广播公司下属移动多媒体广播	1,997	1,320	951	0.0	△27.9	△30.9
	地面波移动多媒体广播运营商11)	9,480	7,569	4,894	0.1	△35.3	△28.1
	小计	**3,526,244**	**3,574,045**	**3,993,137**	**100.0**	**11.7**	**6.4**

地面波广播的广播业务销售总额为3.9931兆韩元，与上年的广播业务销售额3.5740兆韩元相比，增加了11.7%。电视广播的销售额为3.7117兆韩元，比上年增加12.5%。无线电广播的销售额为2,756亿韩元，比上年增加4.1%。地面波广播公司下属多媒体广播和地面波移动多媒体广播持续呈现下降趋势，地面波移动多媒体广播的销售额为10亿韩元，比上年减少28.0%。地面波移动多媒体广播2021年销售额为49亿韩元，与上年相比负增长 35.3%。

地面波广播的广播业务销售额过去三年年均年增长率保持着6.4%的稳步增长，尤其在2021年更是呈现出较大幅度的销售增长。这归因于地面波广播业务部门的电视广播销售额在2020年至2021年创下了12.5%的增长率。另一方面，地面波广播公司下属移动多媒体广播销售额跌幅最大，过去三年年均销售额下降31.0%。地面波移动多媒体广播运营商的过去三年年均销售额也下降了28.1%。

9) 仅统计广播业务的销售额。
10) 所占比重以小数点后一位为单位，因此各部门合计可能有差异。
11) 地面波移动多媒体广播电视运营商的资料是除三大地面波广播公司(KBS、MBC、SBS)和13家地区地面波广播公司以外的YTNDMB、韩国DMB、U1　MEDIA等三家公司的销售额。16家地面波广播公司的与DMB相关的销售额根据按事业法人计入销售额的原则包括到地面波广播中。

表 4　地面波广播电视运营商和地面波移动多媒体广播电视运营商的销售额构成

类别		2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
地面波广播电视运营商	收视费[12]	1,060,577	1,108,885	1,125,347	24.0	1.5	3.0
	广告	1,099,928	1,001,343	1,209,718	25.8	20.8	4.9
	赞助	376,767	385,257	409,733	8.7	6.4	4.3
	节目销售	708,902	781,900	904,934	19.3	15.7	13.0
	其他广播业务	270,590	289,115	338,512	7.2	17.1	11.8
	广播业务销售额合计	3,516,765	3,566,500	3,988,243	85.0	11.8	6.5
	其他业务销售额	704,768	639,903	702,026	15.0	9.7	△0.2
	小计	**4,221,534**	**4,206,403**	**4,690,269**	**100.0**	**11.5**	**5.4**
地面波移动多媒体广播电视运营商	广告	1,821	1,534	1,295	23.1	△15.6	△15.7
	赞助	1,009	976	900	16.1	△7.8	△5.6
	节目销售	162	223	173	3.1	△22.4	3.3
	其他广播业务	6,486	4,837	2,527	45.1	△47.8	△37.6
	广播业务销售额合计	9,480	7,570	4,894	87.3	△35.4	△28.1
	其他业务销售额	428	457	712	12.7	55.8	29.0
	小计	**9,909**	**8,026**	**5,606**	**100.0**	**△30.2**	**△24.8**
广播业务销售额总计		**3,526,244**	**3,574,070**	**3,993,137**	**-**	**11.7**	**6.4**

地面波广播电视运营商和地面波移动多媒体广播电视运营商的详细销售构成，除了地面波移动多媒体广播电视运营商的收视费销售额以外，同样以广告、赞助、节目销售、其他广播业务、其他业务销售额的方式统计。地面波广播电视运营商的销售总额为4.6903兆韩元，同比增长11.5%。地面波广播电视运营商的收视费销售额将电视收视费销售额、信号重发销售额和提供节目获得的销售额加在一起进行计算。2021年，地面波广播电视运营商的收视费同比增长1.5%，达到1.1253兆韩元，占地面波广播电视运营商总销售额的24.0%。广告销售额为1.2097兆韩元，同比增长20.8%，占总销售额的25.8%。这占地面波广播电视运营商销售额的最大比重，从2019年到2021年的过去三年年均增长率为4.9%。赞助获得的销售额为4,097亿韩元，占总销售额的8.7%，同比增长6.4%，近三年年均增长4.3%。销售节目获得的销售额为9,049亿韩元，占总销售额的19.3%，同比增长15.7%。将这些全部合计的广播业务销售额为3.9882兆韩元，同比增长11.8%。其他业务的销售额为7,020亿韩元，同比增长9.7%，但其他业务的销售额最近呈现出反复波动的趋势。

地面波移动多媒体广播电视运营商的销售总额为56亿韩元，与上年相比大幅减少了30.2%。广告销售额为13亿韩元，占总销售额的23.1%，同比减少15.6%。地面波移动多

12）地面波收视费：电视收视费 + 信号重发获得的销售额 + 提供节目获得的销售额

媒体广播电视运营商的广告销售额从2019年至2021年的过去三年年均减少15.7%，呈持续下降趋势。赞助获得的销售额为9亿韩元，占总销售额的16.1%，同比减少7.8%，在过去三年中，赞助销售额以年均5.6%的速度萎缩。销售节目获得的销售额为2亿韩元，同比减少22.4%。其他广播业务的销售额为25亿韩元，同比减少47.8%，是广播业务销售额中最大幅度的负增长。将这些全部合计的广播业务销售额为49亿韩元，同比减少了35.4%，其他业务的销售额为7亿韩元，同比增长了55.8%。地面波移动多媒体广播电视运营商的销售额除其他广播业务的销售额之外，所有领域同比都有所减少并保持持续下降趋势。

(2) 有线电视

2021年，有线电视的广播业务销售额占广播影像产业的7.7%。有线电视包括综合有线广播和转播有线广播，其中综合有线广播的销售额占有线电视总销售额的大部分。

有线广播电视运营商的广播业务销售总额为1.8547兆韩元。上一年广播业务销售总额为1.9340兆韩元，同比减少4.1%。综合有线广播电视运营商的销售额为1.8542兆韩元，同比减少4.4%。转播有线广播电视运营商的销售额为5.43亿韩元，同比减少55.1%。从过去三年有线广播电视运营商的广播业务销售额来看，截至2021年，年均下降4.3%。截至2021年，转播有线广播电视的下降趋势更为明显，年均下降17.7%。截至2021年，转播有线广播电视年平均下降40.5%，每年下降趋势幅度都在扩大。有线广播电视运营商的广播业务销售额总体趋势呈下降趋势，与综合有线广播电视运营商相比，转播有线广播电视运营商的销售额下降趋势更为明显。

表 5　有线电视的广播业务销售额[13)]

中分类	小分类	2019年 (百万韩元)	2020年 (百万韩元)	2021年 (百万韩元)	所占比重 (%)[14)]	同比增长率 (%)	年均增长率 (%)
有线电视	综合有线广播电视运营商	2,022,703	1,932,839	1,854,154	100.0	△4.1	△4.3
	转播有线广播电视运营商	1,535	1,209	543	0.0	△55.1	△40.5
	小计	**2,024,238**	**1,934,048**	**1,854,697**	**100.0**	**△4.1**	**△4.3**

13) 仅统计广播业务的销售额。
14) 所占比重以小数点后一位为单位，因此各部门合计可能有差异。

综合有线广播电视运营商的销售总额为2.7138兆韩元，同比减少2.1%。占总销售额68.3%的广播业务销售额同比减少4.1%，占总销售额31.7%的其他业务销售额同比增长2.5%。综合有线广播电视运营商的销售额从2019年开始总销售额持续下降。收视费为6,509亿韩元，占总销售额的24.0%，同比减少7.9%。广告销售额占总销售额的4.0%，达到1,090亿韩元，同比减少4.8%。赞助占总销售额的0.1%，为23亿韩元，同比减少16.0%。电视购物播放手续费占总销售额的27.5%，为7,470亿韩元，同比增长0.2%。另一方面，入网费和设施安装费为123亿韩元，占总销售额的0.5%，同比增长2.8%。租赁(销售)终端设备获得的销售额同比减少5.5%，为3,296亿韩元。近三年入网费和设施安装费年均增减率为27.4%，保持最大增幅，而租赁(销售)终端设备获得的销售额年均下降4.5%，延续了下降趋势。其他广播业务销售额同比增长了4.2%，达到30亿韩元，但从近三年的增减率来看，销售额下降幅度最大。

转播有线广播电视运营商的销售总额为30亿韩元，同比减少17.8%。广播业务销售额占总销售额的17.9%，为5亿韩元，同比减少55.1%。其他业务销售额占总销售额的82.1%，为25亿韩元，同比增长0.4%。最近三年广播业务销售额的年均增减率为40.5%，呈急剧下降趋势，其他业务销售额年均下降2.5%。在转播有线广播电视业务销售额中，其他业务销售额为广播业务销售额的4.5倍以上，广播业务销售额并非主要销售额的情况仍在持续。

表 6　综合有线广播电视运营商和转播有线广播电视运营商的销售额构成

类别			2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
综合有线广播电视运营商		收视费	762,929	706,536	650,889	24.0	△7.9	△7.6
		广告	135,544	114,539	109,012	4.0	△4.8	△10.3
		赞助	3,027	2,794	2,346	0.1	△16.0	△11.9
		电视购物播放手续费	746,832	745,218	747,001	27.5	0.2	0.0
		入网费和设备安装费	7,582	11,965	12,303	0.5	2.8	27.4
		终端设备租赁(销售)	361,062	348,914	329,610	12.1	△5.5	△4.5
		其他广播业务	5,725	2,873	2,995	0.1	4.2	△27.7
	广播业务销售额		2,022,703	1,932,839	1,854,154	68.3	△4.1	△4.3
	其他业务销售额		906,774	839,035	859,678	31.7	2.5	△2.6
	小计		**2,929,478**	**2,771,874**	**2,713,832**	**100.0**	**△2.1**	**△3.8**
转播有线广播电视运营商	广播业务销售额		1,535	1,209	543	17.9	△55.1	△40.5
	其他业务销售额		2,619	2,478	2,489	82.1	0.4	△2.5
	小计		**4,154**	**3,688**	**3,031**	**100.0**	**△17.8**	**△14.6**
广播业务销售额总计			**2,024,238**	**1,934,048**	**1,854,697**	**-**	**△4.1**	**△4.3**

(3) 卫星电视

由于2012年卫星移动多媒体广播业务的终止，目前卫星电视只提供卫星电视服务。截至2021年，卫星电视占广播影像产业总销售额的2.2%，2021年的销售额为5,210亿韩元，同比下降2.2%。从近三年的销售额来看，年均下降2.5%。

表 7　卫星电视的广播业务销售额[15)]

中分类	小分类	2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
卫星电视	卫星广播电视运营商	548,512	532,788	520,983	100.0	△2.2	△2.5

卫星电视运营商的销售总额为6,554亿韩元，同比减少0.8%。广播业务销售额占卫星电总销售额的79.5%，同比减少2.2%，近三年年均减少2.5%。其他业务销售额占全体销售额的20.5%，为1,344亿韩元，同比增长5.3%，近三年保持了年均10.6%的增长势头。收视费占总销售额的44.6%，占比最大，2021年达到2,920亿韩元，但同比减少3.4%。广告销售额占总销售额的5.0%，为330亿韩元，同比减少0.7%，近三年年均下降了18.8%。电视购物播放手续费占总销售额的27.1%，为1,777亿韩元，同比增长1.1%，近三年年均增长率为0.9%，保持着小幅增长趋势。入网费和设备安装费占总销售额的0.9%，为59亿韩元，同比减少4.8%。终端设备租赁(销售)销售额占总销售额的1.8%，为118亿韩元，同比减少20.6%，在广播业务销售额中创下了最大幅度的下降趋势。其他广播业务销售额仅占总销售额的0.1%，即6亿韩元，但同比增长了1.0%，近三年销售额年均增长率为13.0%。

表 8　卫星广播电视运营商的销售额构成

类别		2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
卫星广播电视运营商	收视费	304,533	302,173	291,960	44.6	△3.4	△2.1
	广告	50,039	33,210	32,978	5.0	△0.7	△18.8
	电视购物播放手续费	174,566	175,722	177,717	27.1	1.1	0.9
	入网费和设备安装费	5,957	6,220	5,919	0.9	△4.8	△0.3
	终端设备租赁(销售)	12,916	14,860	11,799	1.8	△20.6	△4.4
	其他广播业务销售额	478	604	610	0.1	1.0	13.0
	广播业务销售额	548,512	532,788	520,983	79.5	△2.2	△2.5

15) 仅统计广播业务的销售额。

类别		2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
	其他业务销售额	109,784	127,615	134,371	20.5	5.3	10.6
	小计	**658,297**	**660,403**	**655,353**	**100.0**	**△0.8**	**△0.2**

(4) 广播电视频道使用业

广播电视频道使用商担任在付费电视市场制作和供应节目的角色。广播电视频道使用商的广播业务销售额占广播业务总销售额的32.3%，截至2021年同比增长6.8%，达到7.5520兆韩元。近三年的销售额年均增长率为3.2%，呈持续增长趋势。

表 9　广播电视频道使用商的广播业务销售额16)

中分类	小分类	2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
广播电视频道使用业	广播电视频道使用商17)	7,091,840	7,074,233	7,551,968	100.0	6.8	3.2

广播电视频道使用商的广播业务销售额与其他业务销售额合计的销售总额为13.4830兆韩元，同比增长5.3%。这是因为其他业务销售额同比增长3.5%至5.9311兆韩元。广播电视频道使用商的广播业务销售额占总销售额的56.0%，达到7.5520兆韩元。

广播电视频道使用商的收视费同比增长7.3%，为9,390亿韩元，近三年年均增长率为6.3%，呈持续增长趋势。广告销售额同比增长15.5%，为1.6912兆韩元。近三年年均增减率为3.1%，但一直在波动。赞助为5,258亿韩元，同比增长22.7%，近三年年均增长12.8%。通过销售节目获得的销售额占总销售额的2.3%，同比增长12.7%，达到3,078亿韩元。广播设施租赁与活动获得的销售额所占比重非常小，分别为0.1%和0.3%。特别是继2020年之后受新冠疫情的影响，活动获得的销售额与上一年相比下降了3.4%，近三年的年均增减率急剧下降至35.1%。截至2021年，广播电视频道使用商的销售额中电视购物广播销售额所占比重最高，同比增长0.2%，达到3.8193兆韩元。并且近三年年均增减率为1.4%，呈现出持续增长的趋势。其他广播业务的销售额同比增长25.4%，为2,165亿韩元。

16) 仅统计广播业务的销售额。
17) 广播电视频道使用商兼业运营商(9家地面波广播电视运营商，2家地面波DMB)的销售额不分开，合算到各兼业兼业企业计算得出。

表 10　广播电视频道使用商的销售额构成

类别			2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
广播电视频道使用业18)		收视费19)	831,655	874,892	938,958	7.0	7.3	6.3
		广告	1,590,360	1,463,655	1,691,165	12.5	15.5	3.1
		赞助	413,202	428,343	525,781	3.9	22.7	12.8
		节目销售	272,543	273,152	307,750	2.3	12.7	6.3
		广播设施租赁	7,720	7,982	11,203	0.1	40.4	20.5
		活动	98,142	42,785	41,316	0.3	△3.4	△35.1
		电视购物广播	3,711,079	3,810,804	3,819,306	28.3	0.2	1.4
		其他广播业务	167,136	172,610	216,488	1.6	25.4	13.8
	广播业务销售额		7,091,840	7,074,223	7,551,968	56.0	6.8	3.2
	其他业务销售额		5,685,949	5,729,592	5,931,062	44.0	3.5	2.1
总计			**12,777,790**	**12,803,815**	**13,483,030**	**100.0**	**5.3**	**2.7**

(5) 互联网影像供应业

互联网影像供应业是在广播影像产业高速增长的领域。不同于销售额规模正在减少的地面波广播或有线电视市场，其近三年销售额连续增长。互联网影像供应业的广播业务销售总额同比增长11.9%，为5.4808兆韩元，占全部广播业务销售额的22.8%，近三年年均增长率为10.6%。

互联网影像供应业包括互联网协议电视(IPTV)和IPTV内容提供商(CP)。互联网协议电视(IPTV)在全部广播业务销售额中占19.8%，2021年销售额规模同比增长8.2%，达到4.6368兆韩元。IPTV内容提供商(CP)占全部广播业务销售额的3.6%，同比增长37.7%，达到8,440亿韩元。近三年年均增长率分别为9.6%和16.3%，IPTV内容提供商(CP)的增长尤为显着。

表 11　互联网影像供应业的广播业务销售额20)

中分类	小分类	2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
互联网影像供应业	互联网协议电视(IPTV)	3,856,648	4,283,590	4,636,819	84.6	8.2	9.6
	IPTV内容提供商 (CP)	624,210	613,064	843,999	15.4	37.7	16.3
	小计	**4,480,858**	**4,896,654**	**5,480,818**	**100.0**	**11.9**	**10.6**

18) 广播电视频道使用商的销售额除去了与地面波广播电视运营商相同法人的9家公司以及与地面波移动多媒体广播电视运营商相同法人的2家公司。
19) 广播电视频道使用商的收视费 = 提供节目获得的销售额
20) 仅统计广播业务的销售额。

互联网协议电视(IPTV)运营商的销售总额为34.7192兆韩元，同比增长2.5%。其中广播业务销售额为销售总额的13.4%，其他业务销售额为86.6%，达到30.0824兆韩元。收视费为2.7151兆韩元，同比增长4.3%，近三年保持了年均5.6%的增长。广告销售额为1,071亿韩元，同比增长4.0%。电视购物播放手续费为1.3243兆韩元，同比增长19.5%。入网费与设施安装费及租赁(销售)终端设备获得的销售额分别为534亿韩元和3,722亿韩元。入网费与设施安装费获得的销售额同比增长8.0%，近三年年均增长率小幅上升至0.8%。租赁(销售)终端设备获得的销售额同比增长5.8%，近三年年均增长15.0%。

IPTV内容提供商(CP)销售总额为2.2833兆韩元，其中广播业务销售额占37.0%，为8,440亿韩元。提供节目获得的销售额同比减少27.2%，为754韩元。赞助为51亿韩元，同比增长120.6%。占IPTV内容提供商（CP）广播业务销售额比重最高（24.9%）的广播节目销售额同比增长68.6%，达到5,678亿韩元。其他广播业务销售额同比增长14.8%，为1,956亿韩元。

表 12　互联网协议电视(IPTV)和IPTV内容提供商(CP)的销售额构成

类别			2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
互联网协议电视(IPTV)		收视费	2,434,799	2,602,654	2,715,070	7.8	4.3	5.6
		广告	123,240	102,908	107,056	0.3	4.0	△6.8
		电视购物播放手续费	906,417	1,108,578	1,324,280	3.8	19.5	20.9
		入网费和设施安装费	52,548	49,465	53,399	0.2	8.0	0.8
		终端设备租赁(销售)	281,342	351,915	372,158	1.1	5.8	15.0
		其他广播业务	58,300	68,070	64,856	0.2	△4.7	5.5
	广播业务销售额		3,856,648	4,283,590	4,636,819	13.4	8.2	9.6
	其他业务销售额		30,240,640	29,575,845	30,082,380	86.6	1.7	△0.3
	小计		**34,097,288**	**33,859,436**	**34,719,200**	**100.0**	**2.5**	**0.9**
IPTV内容提供商(CP)		提供节目	85,277	103,567	75,403	3.3	△27.2	△6.0
		赞助	757	2,322	5,123	0.2	120.6	160.1
		节目销售	350,449	336,819	567,828	24.9	68.6	27.3
		其他广播业务	187,726	170,356	195,646	8.6	14.8	2.1
	广播业务销售额		624,210	613,064	843,999	37.0	37.7	16.3
	其他业务销售额		2,004,583	1,346,192	1,439,284	63.0	6.9	△15.3
	小计		**2,628,794**	**1,959,256**	**2,283,283**	**100.0**	**16.5**	**△6.8**
广播业务销售额总计			**4,480,858**	**4,896,654**	**5,480,818**	**-**	**11.9**	**10.6**

(6) 广播影像制作业

广播影像制作业包括广播影像独立制造商，2021年销售额占全部广播业务的19.1%。销售额同比增长15.6%，达到4.5691兆韩元，近三年年均增长20.0%。

表 13　广播影像制作业的销售额

中分类	小分类	2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
广播影像制作业	广播影像独立制造商	3,171,316	3,952,961	4,569,106	100.0	15.6	20.0

3) 广播广告销售额21)

2021年广播广告销售总额为3.1512兆韩元，同比增长16.0%。2021年，地面波广播电视运营商的广播广告销售额为1.2097兆韩元，同比增长20.8%。地面波广播电视运营商的广播广告销售额呈现持续下滑的态势，但由于2021年销售额增加，近三年年均增长4.9%。综合有线广播电视广告销售额为1,090亿韩元，同比减少4.8%，近三年年均下降10.3%。卫星广播电视广告销售额同比增长2.4%至330亿韩元，近三年年均下降18.8%。广播电视频道使用商的广播广告销售额为1.6912兆韩元，同比增长15.5%，近三年年均增长3.1%。互联网协议电视(IPTV)的广播广告销售额为1,071亿韩元，同比增长4.0%，近三年年均下降6.8%。2021年整体广播广告销售额同比增长，仅地面波多媒体广播和综合有线广播广告销售额出现下滑。地面波广播仅在2021年取得广告销售反弹的成果。

表 14　各广播媒体的广告销售额

类别	2019年(百万韩元)	2020年(百万韩元)	2021年(百万韩元)	所占比重(%)	同比增长率(%)	年均增长率(%)
地面波广播电视运营商	1,099,928	1,001,343	1,209,718	38.4	20.8	4.9
地面波移动多媒体广播电视运营商22)	1,821	1,534	1,295	0.0	△15.6	△15.7
综合有线广播电视	135,544	114,539	109,012	3.5	△4.8	△10.3
卫星广播电视	50,039	32,210	32,978	1.0	2.4	△18.8
广播电视频道使用商	1,590,360	1,463,655	1,691,165	53.7	15.5	3.1
互联网协议电视(IPTV)	123,240	102,910	107,056	3.4	4.0	△6.8
总计	**3,000,932**	**2,716,191**	**3,151,223**	**100.0**	**16.0**	**2.5**

21）由于销售额四舍五入到十万韩元单位，因此每个部门的总额可能存在差异。

从各广播媒体的广告销售额来看，广播电视频道使用商的广播广告销售额占比重最大，为53.7%，地面波广播电视运营商的广播广告销售额比重为38.4%，同比略有增加。截至2016年，地面波广播广告销售额占总广播广告销售额的50.4%，超过一半，但2021年下降了12.0%p，而广播电视频道使用商在2016年占据了41.9%的占有率，2021年增长了11.8%p。

4）付费电视用户现状

截至2021年，付费电视用户数量为3,577万。这一数值与上一年相比增长了2.8%。近三年的年均增长率为2.9%，可以看出付费电视市场缓慢增长趋势。

有线电视分为综合有线广播电视和转播有线广播电视。从各媒体的用户现状来看，截止2021年，综合有线广播电视用户数为1,288万，较上年减少1.9%。模拟广播电视用户在服务终止时没有用户，而这些用户没有重新订阅有线广播电视，这一事实也可以被视为影响综合有线广播电视用户数量减少的一个因素。8VSB是一种让模拟有线广播电视用户观看数字广播电视的传输方式，付费广播电视公司提供8VSB数字转换器，让用户在不改变费率计划的情况下观看数字广播电视。截至2021年，8VSB用户数为577万，比上年减少1.1%。QAM用户数为711万户，比上年减少2.5%。截至2021年，转播有线广播电视拥有12,000名用户。转播有线广播电视用户较上年下降65.4%，近三年年均下降47.9%，仍处于极低水平。

表 15 付费电视用户情况

类别			2019年(人)	2020年(人)	2021年(人)	所占比重(%)	同比增长率(%)	年均增长率(%)
有线广播电视	综合有线广播电视		13,475,595	13,129,858	12,878,502	36.0	△1.9	△2.2
		模拟	19,424	3,409	0	0.0	△100	△100
		8VSB[23]	5,960,710	5,835,913	5,770,965	16.1	△1.1	△1.6
		QAM[24]	7,495,461	7,290,536	7,107,537	19.9	△2.5	△2.6
	转播有线广播电视		45,971	36,101	12,488	0.0	△65.4	△47.9
	小计		**13,521,566**	**13,165,959**	**12,890,990**	**36.0**	**△2.1**	**△2.4**
互联网协议电视(IPTV)[25]	实时IPTV		17,125,034.5	18,537,192.5	19,891,198	55.6	7.3	7.8
卫星广播电视[26]			3,168,016.5	3,082,073.5	2,991,322	8.4	△2.9	△2.8
总计			**33,814,617**	**34,785,225**	**35,773,510**	**100.0**	**2.8**	**2.9**

22）在地面波移动多媒体广播电视运营商中，附属于地面波广播公司（KBS、MBC、SBS）的移动多媒体广播公司的广告销售额包括在地面广播电视广告的销售额中。

23）8VSB（8级残留边带，8-level vestigial sideband）是一种用于数字地面波广播的传输方式，如果现有的模拟有线广播电视用户改用8VSB，无需单独的数字机顶盒即可收看高清数字广播电视（双向服务不可用）。从2015年开始与模拟分离调查。

互联网协议电视（IPTV）仅以实时用户为对象进行统计。截至2021年，IPTV用户数为1,989万，比上年增长7.3%，近三年年均增长7.8%。在整个付费电视市场中，互联网协议电视（IPTV）占 55.6%，有线电视占36.0%。互联网协议电视（IPTV）在付费电视市场的市场份额超过一半，相比有线电视更占优势的局面自2017年以来一直在持续。

截至2021年，一般卫星广播电视用户数为299万，占付费电视市场用户总量的8.4%。一般卫星广播电视用户数比上年下降2.9%，近三年年均下降2.8%。

从付费电视用户的趋势来看，可以看出模拟广播电视服务实际上已经结束。继地面广播的模拟广播服务于2012年12月31日结束后，综合有线广播电视的模拟广播电视服务可视为推迟结束了10年。从2017年开始，政府主导推进了模拟广播电视服务的终止，使得用户转向其他服务。从实时IPTV用户增长来看，每年稳定地获得100万以上用户。

24) QAM（正交幅度调制，Quadrature Amplitude Modulation）是数字有线广播电视中使用的一种传输方式，通过机顶盒提供广播和双向通信等功能。

25) 对于IPTV，仅针对实时IPTV用户，不包括Pre-IPTV用户。

26) 对于IPTV和卫星广播，2015年OTS（卫星和IPTV组合产品，Olleh TV Skylife的简称）用户按KT和KT Skylife用户分成一半分配给各运营商。

第2节 广播影像产业的从业人员现状

1）广播影像产业从业人员一般现状

2021年，广播影像产业的从业人员数为50,160人，同比减少0.2%。广播影像产业从业人员数近三年年均增减率为0.8%，虽然略有下降，但可以看出处于停滞期。从各运营商来看，广播电视频道使用商在全体从业人员中所占比重最高，为34.1%。地面波广播的运营商占27.2%，广播影像独立制造商占27.0%，综合有线广播电视运营商占8.9%。

从不同行业的从业人员情况可看出，地面波广播在2021年从业人员数为13,670人，同比减少1.4%。其中地面波广播电视运营商从业人员数为13,627人，同比减少1.4%。地面波移动多媒体广播电视运营商从业人员数为43人，与上一年相同。有线电视运营商从业人员数为4,505人，同比减少5.7%。其中综合有线广播电视运营商从业人员数为4,456人，同比减少5.4%，转播有线广播电视运营商为49人，减少了22.2%。一般卫星广播电视运营商从业人员数为379名，同比减少1.6%。广播电视频道节使用商业人员数为17,119人，同比减少0.8%。互联网协议电视(IPTV)从业人员数为 919人，同比增长7.6%。广播影像独立制造商从业人员为13,568人，同比增长3.5%。广播影像产业的从业人员较上年增加的行业是互联网协议电视(IPTV)和广播影像独立制造商，从从业人员的趋势来看，可以确认两极分化现象仍在继续。

表 16 广播影像产业各行业的年度从业人员数情况

中分类	小分类	2019年(人)	2020年(人)	2021年(人)	所占比重(%)	同比增长率(%)	年均增长率(%)
地面波广播	地面波广播电视运营商	14,458	13,827	13,627	27.2	△1.4	△2.9
	地面波移动多媒体广播电视运营商	61	43	43	0.1	0.0	△16.0
	小计	**14,519**	**13,870**	**13,670**	**27.3**	**△1.4**	**△3.0**
有线电视	综合有线广播电视运营商	4,587	4,712	4,456	8.9	△5.4	△1.4
	转播有线广播电视运营商	76	63	49	0.1	△22.2	△19.7
	小计	**4,663**	**4,775**	**4,505**	**9.0**	**△5.7**	**△1.7**
卫星电视	一般卫星广播电视运营商	376	385	379	0.8	△1.6	0.4
广播电视频道使用业[27]	广播电视频道使用商	17,181	17,249	17,119	34.1	△0.8	△0.2

中分类	小分类	2019年 (人)	2020年 (人)	2021年 (人)	所占比重 (%)	同比增长率 (%)	年均增长率 (%)
互联网影像供应业	互联网协议电视 (IPTV)	814	854	919	1.8	7.6	6.3
广播影像制造业	广播影像独立制造商	13,453	13,106	13,568	27.0	3.5	0.4
总计		**51,006**	**50,239**	**50,160**	**100.0**	**△0.2**	**△0.8**

从广播影像产业各行业从业人员数趋势可以看出，互联网协议电视(IPTV)的增长最为显著。互联网协议电视(IPTV)近三年以年均6.3%的速度呈现稳定的增长趋势。卫星广播电视运营商和广播影像独立制造商近三年年均呈现出0.4%的上升趋势，但卫星广播电视运营商处于停滞期，而广播影像独立制造商则受到广播电视市场环境的影响，反复波动。有线电视运营商近三年年均下降1.7%，综合有线广播电视运营商近三年年均下降1.4%，转播有线广播电视运营商近三年年均下降19.7%，从业人员的减少现象仍在持续。地面波广播电视运营商从业人员数近三年年均下降2.9%，尤其是地面波移动多媒体广播电视运营商的减幅达到16.0%。但是在地面波广播从业人员数减少中，地面波广播电视运营商从业人员数在三年内减少了831人，这对地面波广播从业人员数减少的影响最大。

27) 兼营其他广播业务的与地面波广播电视运营商有相同法人的9家公司、与地面波移动多媒体广播电视运营商有相同法人的2家公司分别包括在地面波广播电视运营商和地面波移动多媒体广播电视运营商从业人员中。

第3节 广播影像产业进出口现状

1）广播影像产业的出口额与进口额现状28)

广播影像产业的出口额与进口额是将地面波广播，广播电视频道使用商及广播影像独立制造商的进出口额合并计算得出的。2021年，广播影像内容出口额为7.18亿美元，同比增长3.6%。进口额为6,076万美元，同比减少0.3%。

近三年进出口年均增长率显示，出口额稳步增长，年均增长15.4%。另一方面进口额呈持续减少趋势，自2019年之后年均下降21.0%。

表 17 广播影像产业的出口额和进口额现况

分类	2019年 (千美元)	2020年 (千美元)	2021年 (千美元)	同比增长率 (%)	年均增长率 (%)
出口额	539,214	692,790	717,997	3.6	15.4
进口额	97,366	60,969	60,762	△0.3	△21.0
进出口差额	**441,848**	**631,822**	**657,236**	**3.9**	**36.4**

2）各广播运营商的出口额

从各广播运营商的出口额可以看出，广播影像独立制造商所占比重最高，为39.7%。广播电视频道使用商占30.6%，地面波广播占29.7%。从近三年的出口额趋势来看，整体上地面波广播电视运营商的出口额继续呈现小幅增长，而广播电视频道使用商的出口则呈现较大的起伏。广播影像独立制造商的出口额在近三年中保持了急剧上升的趋势。

2021年地面波广播运营商的出口额为2.1333亿美元，同比增长2.3%，近三年年均增长10.0%。广播电视频道使用商为2.199亿美元，同比减少22.3%，近三年年均增长7.4%。广播影像独立制造商为2.8477亿美元，同比增长41.5%，近三年年均增长28.6%，持续了大幅增长势头。

28) 广播产业的进出口额把广播产业实情调查报告和广播影像独立制造商实情调查报告的进出口额加在一起计算，因此加在一起统计的数值和单独合计的数值可能存在略微差异。此外，表里的数值以一百美元为单位进行了四舍五入，因此文章里的统计数值有可能与表里的数值有所差异。

表 18 广播影像产业的出口额现况

媒体		2019年(千美元)	2020年(千美元)	2021年(千美元)	所占比重(%)	同比增长率(%)	年均增长率(%)
地面波广播	节目销售	126,709	130,046	142,865	19.9	9.9	6.2
	支援海外侨胞广播	522	362	338	0.0	△6.6	△19.5
	录像和DVD销售	550	216	241	0.0	11.8	△33.8
	时间块销售	34,431	30,745	29,913	4.2	△2.7	△6.8
	节目版式销售	6,917	7,096	9,969	1.4	40.5	20.1
	其他	7,333	40,080	30,001	4.2	△25.1	102.3
	小计	**176,462**	**208,545**	**213,326**	**29.7**	**2.3**	**10.0**
广播电视频道使用商	节目销售	175,576	225,068	193,980	27.0	△13.8	5.1
	支援海外侨胞广播	394	597	95	0.0	△84.1	△50.9
	录像和DVD销售	0	3	0	0.0	-	-
	时间块销售	133	186	350	0.0	88.2	62.2
	时间块销售	6,732	5,787	4,939	0.7	△14.7	△14.3
	其他	7,843	51,353	20,541	2.9	△60.0	61.8
	小计	**190,678**	**282,995**	**219,904**	**30.6**	**△22.3**	**7.4**
地面波广播和频道使用合计		**367,141**	**491,539**	**433,230**	**60.3**	**△11.9**	**8.6**
广播影像独立制造商		172,073	201,251	284,767	39.7	41.5	28.6
总计		**539,214**	**692,790**	**717,997**	**100.0**	**3.6**	**15.4**

出口部门大体上分为六种收入来源，分别为节目销售、支援海外侨胞广播[29]、录像和DVD销售、时间块(Time Block)销售[30]、节目版式销售[31]以及其他[32]。地面波广播和广播电视频道节目供应商按照这一分类统计出口额。而广播影像独立制造商不按这一分类统计出口额，而是统计总出口额。

2021年，地面波广播的节目销售产生的出口额为1.4287亿美元，同比增加9.9%，占总出口额的19.9%。地面波广播支援海外侨胞广播产生的出口额同比减少6.6%，为34万美元。录像和DVD销售同比增长11.8%，为24万美元。时间块销售产生的出口额同比减少2.7%，为2,991万美元，占总广播影像产业出口额的4.2%。节目版式销售产生的出口额为997万美元，同比增长40.5%。其他部门的出口额为3,000万美元，同比减少25.1%。

广播电视频道使用商节目销售产生的出口额为1.9398亿美元，同比减少13.8%，占总出

29) 支援海外侨胞广播，包括以海外侨胞为对象销售没有进行配音或加字幕的韩国电视节目的录像或VOD和对出口节目的字幕或配音作业提供的政府支援。
30) 时间块销售是向外国广播公司销售广播时段，使外国广播公司在特定广播时段只播放韩国广播公司的节目。
31) 节目版式是指组成节目的各种形式。独特而固有的节目版式具有著作权，因此成为交易对象。
32) 其他里包括除支援海外侨胞广播、录像和DVD销售、时间块销售、节目版式销售、节目(成品)销售以外的其他一切出口形式。

口额的27.0%。支援海外侨胞广播为9万美元，同比减少84.1%。录像/DVD在2021年没有出口，时间块销售产生的出口额为35万美元，同比增长88.2%。节目版式销售产生的出口额为494万美元，同比减少14.7%。其他总的出口额为2,054万美元，同比减少60.0%。对于广播电视频道使用商来说，除时间块销售之外，所有部门的出口均同比下降。

2020年广播影像独立制造商的出口额超过2亿美元，持续稳定增长。2021年达到2.8477亿美元，同比增长41.5%，占总广播影像产业出口额的39.7%。

3）各广播业务的进口额现状

从各广播运营商的进口额可以看出，广播电视频道使用商所占比重最高，达到93.6%。地面波广播占6.3%，广播影像独立制造商占0.1%。地面波广播进口额2021年为383万美元，同比减少6.0%，近三年年均增长2.6%。广播电视频道使用商为5,689万美元，同比增长2.9%，近三年年均减少21.9%。广播影像独立制造商为4万美元，同比减少97.4%，近三年年均下降65.3%。

进口领域分为广播电视节目、录像/DVD销售、版式进口以及其他。地面波广播自2014年以后不再公开详细的进口内容，广播影像独立制造商也仅统计整体进口额。目前提供各领域进口资料的只有广播电视频道节目提供商。

从地面波广播进口额明细来看，2021年广播电视节目进口额为369万美元，较上年下降9.5%，近三年年均增长0.7%。地面波广播版式进口在2021年为15万美元。

从广播电视频道使用商进口额明细来看，广播电视节目进口额为5,593万美元，较上年增长1.6%，近三年年均下降22.0%。录像/DVD没有进口。版式进口额为49万美元，同比增长161.4%，近三年年均增长25.2%。其他进口在2020年为47万美元，与上年相比飙升了840%。

广播影像独立制造商进口额在2019年急剧下降，2020年看似有所反弹，但随着2021年骤减至4万美元，近三年年均增减率为65.3%，继续大幅下滑。

各广播商家进口额深受广播环境变化的影响呈现出大幅波动，其中地面波广播和广播频道使用商的广播电视节目收入呈现出共同减少的趋势。

表 19 广播影像产业的进口额现况

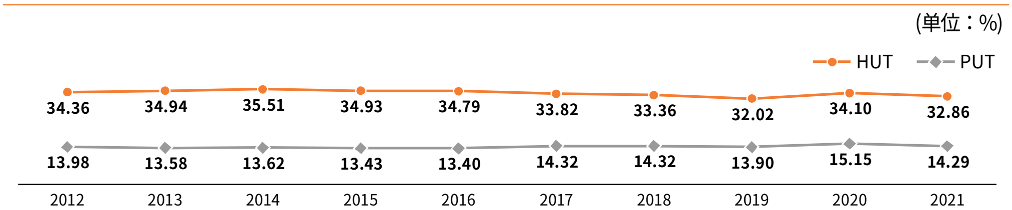
媒体 \ 年度		2019年 (千美元)	2020年 (千美元)	2021年 (千美元)	所占比重 (%)	同比增长率 (%)	年均增长率 (%)
地面波广播	节目	3,636	4,074	3,685	6.1	△9.5	0.7
	版式	0	0	145	0.2	-	-
	小计	**3,636**	**4,074**	**3,830**	**6.3**	**△6.0**	**2.6**
广播电视道使用商	节目	91,827	55,066	55,925	92	1.6	△22.0
	录像/DVD销售	1,227	0	0	0.0	-	△100.0
	版式	315	189	494	0.8	161.4	25.2
	其他	12	50	470	0.8	840.0	525.8
	小计	**93,381**	**55,305**	**56,889**	**93.6**	**2.9**	**△21.9**
广播影像独立制造商		349	1,590	42	0.1	△97.4	△65.3
总计		**97,366**	**60,969**	**60,761**	**100.0**	**△0.3**	**△21**

第4节 电视收视指标分析

1）各年度的总家庭收视率(HUT)和总个人收视率(PUT)

2021年家庭总收视率(HUT)为32.86%，比上年下降1.24%p，总个人总收视率(PUT)也下降0.85%p至14.29%。这可能是因为2020年由于新冠疫情受限制的户外活动在2021年有所增加，同时在家时间减少，导致观看电视的时间减少。有趣的是，2020年年累计确诊病例约6万例，但2021年累计确诊病例增加近10倍，达到57万例，这是因为随着疾病管理系统的启动，让人们对新冠的恐惧感有所减少。

图 1　各年度家庭收视率和个人收视率趋势



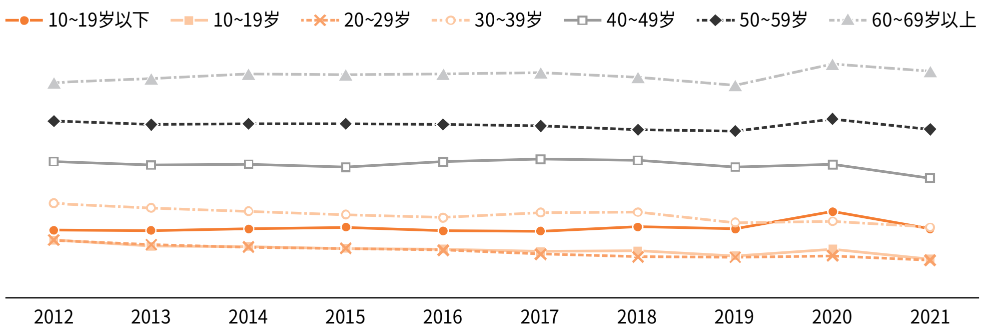
资料来源：韩国尼尔森电视收视率(所有家庭，所有平台，National)

2）各年龄层的总个人收视率

2021年各年龄层的收视率与家庭和个人的整体收视率相似，在所有年龄层中收视率都有所下降。10～19岁年龄层为4.43%，较上年下降1.16%p，10～19岁年龄层以下为7.89%，下降1.98%p。不同于2020年因新冠疫情而进行线上课程，随着线下教学的恢复，这些年龄层的电视收视率有所下降。40～49岁年龄层为13.71%，下降1.57%p。30～39岁年龄层为8.08%，下降0.68%p。50～59岁年龄层为19.30%，下降1.21%p。60～69岁年龄层为25.99%，下降0.83%p。变化最小的20～29岁年龄层下降了0.52%p至4.31%。尽管因新冠疫情而增加的所有年龄层收视率在2021年下降，与新冠疫情（2019年）传播前相比有所下降的10～49年龄层的收视率与收视率高于以往的50～69岁年龄层的收视率增减趋势不同。

图 2 各年龄层收视率趋势

(单位：%)



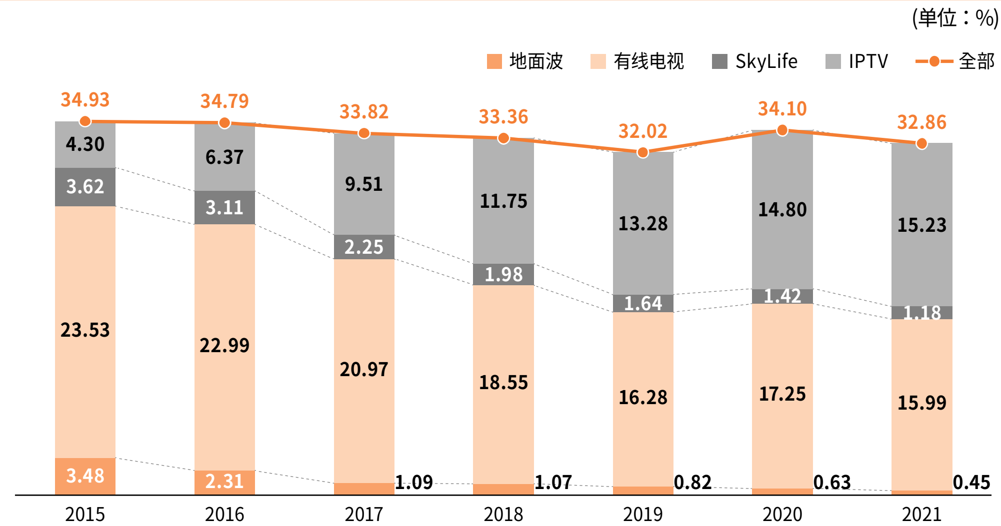
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
10～19岁以下	7.73	7.71	7.88	8.09	7.67	7.61	8.11	7.88	9.87	7.89
10～19岁	6.61	5.92	5.87	5.65	5.57	5.30	5.39	4.82	5.59	4.43
20～29岁	6.60	6.07	5.81	5.65	5.44	4.99	4.68	4.65	4.83	4.31
30～39岁	10.82	10.29	9.91	9.52	9.17	9.76	9.81	8.63	8.76	8.08
40～49岁	15.61	15.22	15.31	14.95	15.59	15.89	15.76	14.99	15.28	13.71
50～59岁	20.26	19.83	19.95	19.94	19.88	19.68	19.28	19.08	20.51	19.30
60～69岁以上	24.65	25.13	25.69	25.61	25.66	25.80	25.28	24.38	26.82	25.99

资料来源：韩国尼尔森电视收视率(所有家庭，所有平台，National)

3) 各平台的收视率

平台收视率不是分析单个频道的收视率，而是分析特定平台的电视收视总量。2015年至2021年，各电视收视平台家庭收视率整体下降，未能维持2020年的增长，2021年为32.86%，较上年下降1.24%p。除了通过IPTV平台收看电视比上年增加0.43%p以外，所有平台的家庭收视率均有所下降，尤其是有线电视收视率较上年下降了1.26%p。

图 3　各广播电视平台家庭收视率趋势



资料来源：韩国尼尔森电视收视率(所有家庭，所有平台，National)

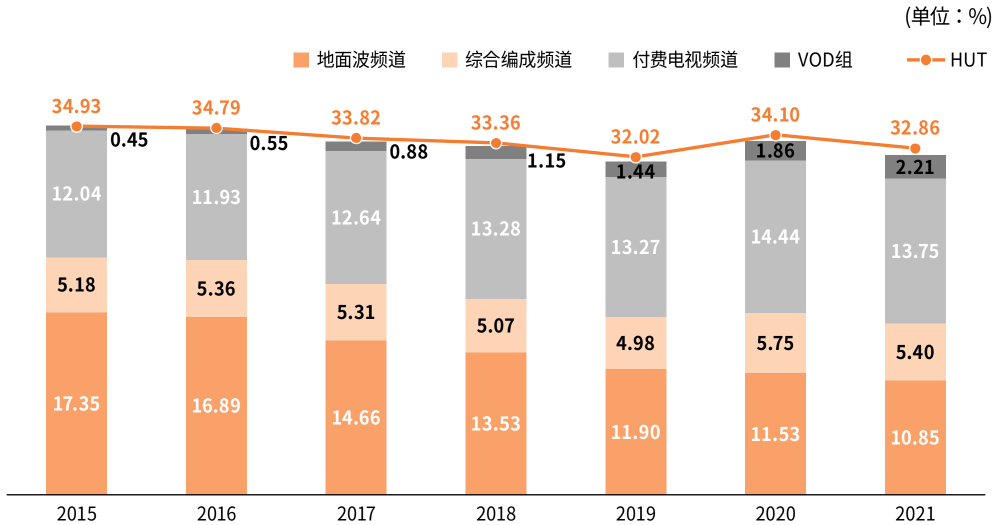
这些结果表明，整体电视观看正在从广播电视中心平台（地面波、有线、卫星）转向互联网传输平台IPTV。此前有线平台的收视率高于其他平台，但在2021年，随着通过IPTV 收看电视的人数比例增加，差距已大大缩小。基于这一趋势，2022年收视率最高的广播电视平台很可能会变成IPTV。

4) 各频道收视率

为了了解2015年至2021年各频道组的收视率，将频道大致分为四大类。地面波频道包括KBS1、KBS2、MBC地区电视台和EBS、SBS地区民营电视台，将综合编成4个频道(JTBC、MBN、TV CHOSUN、频道A)、付费电视(其他PP频道)、VOD(非实时服务)合计后计算。

地面波频道总收视率为10.85%，较上年下降0.68%p，综合编成频道为5.40%，较上年下降0.35%p，付费电视频道为13.75%，较上年下降0.68%p。而VOD为2.21%，较上年增长0.34%p。2020年有所增加的综合编成频道和付费电视频道的收视率在2021年再次下降，实时频道的收视率全部下降，而VOD收视率较上年增长了2%左右。

图 4 各频道的年家庭收视率



资料来源：韩国尼尔森电视收视率(所有家庭，所有平台，National)

注) HUT(House Using Television): 所有家庭的电视收视百分比

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