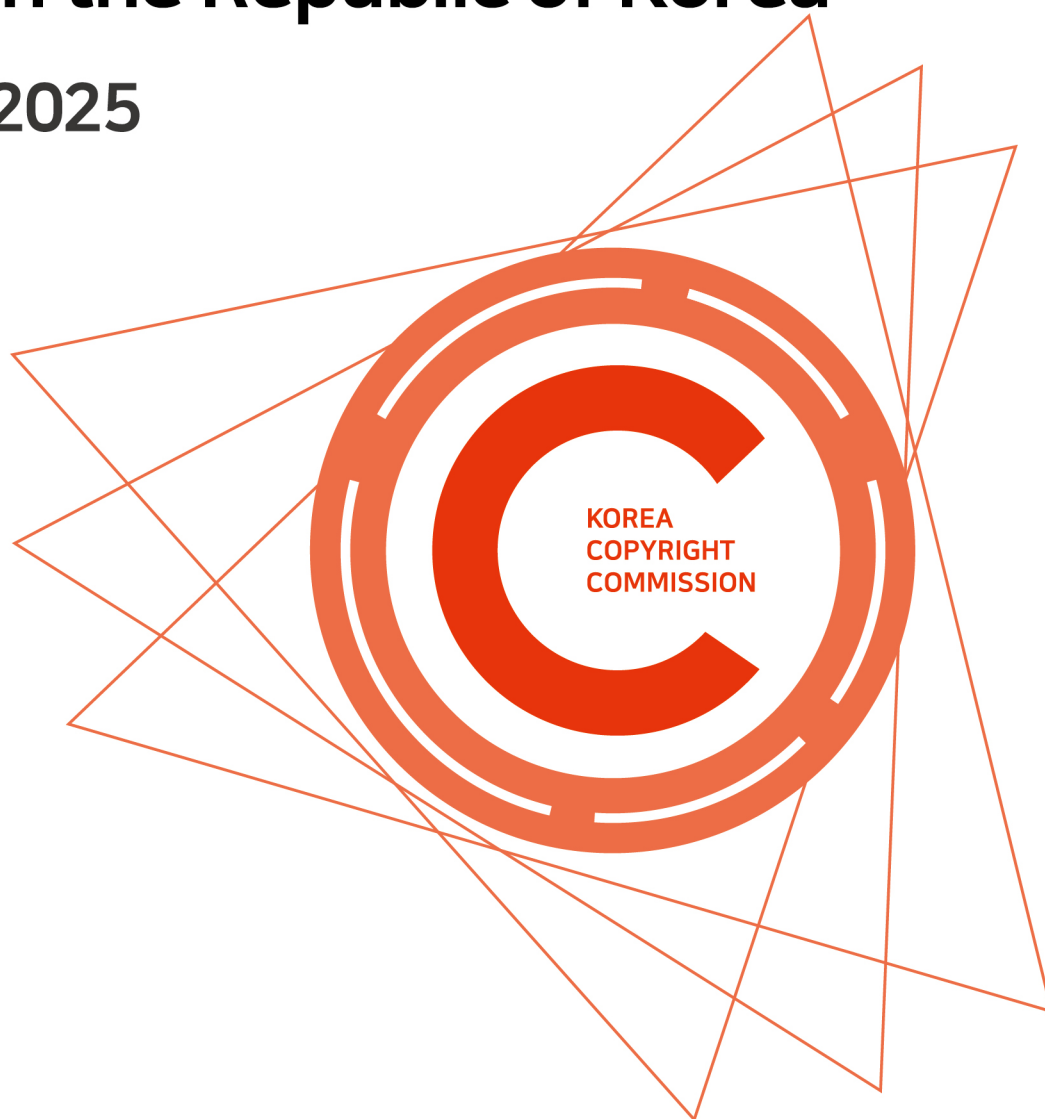


The Economic Contribution of Copyright Industries in the Republic of Korea

2025



Ministry of Culture, Sports
and Tourism



KOREA COPYRIGHT
COMMISSION



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The Economic Contribution of Copyright Industries in the Republic of Korea

The *Economic Contribution of Copyright Industries in the Republic of Korea* is a study designed to quantitatively measure the economic effects generated throughout the process of creation, production, distribution and use of works within the copyright industries and to analyze their industrial structure and economic contribution. Based on the methodology set out in the *WIPO Guide on Surveying the Economic Contribution of the Copyright-Based Industries* (2003; 2015), this study classifies copyright industries into four categories: core copyright industries, interdependent copyright industries, partial copyright industries, and non-dedicated support industries, and estimates sales, value added, and employment of each category in both nominal and real terms. The reference year for the analysis is 2023, and data from the past five years (2019–2023) are analyzed together to explain medium-term trends in copyright industries.

As of 2023, Korea's nominal GDP was a little under KRW 2,409 trillion, and the nominal value added of copyright industries was just over KRW 265 trillion, accounting for 11.0% of GDP. Of this total, core copyright industries generated approximately KRW 169 trillion in nominal value added, representing 7.0% of GDP, which is the second-largest in terms of scale. In real terms, the value added of copyright industries was a little above KRW 257 trillion, accounting for 11.4% of GDP, while core copyright industries generated about KRW 160 trillion, representing 7.1% of GDP. Both the nominal and real figures confirm that copyright industries are key sectors in the Korean economy.

In nominal terms, core copyright industries accounted for 63.6% of the total value added generated by copyright industries in 2023, followed by interdependent copyright industries at 23.5%, non-dedicated support industries at 9.2%, and partial copyright industries at 3.7%. In real terms, the value added of copyright industries recorded 62.3%, 26.0%, 8.2% and 3.5% for core

copyright industries, interdependent copyright industries, non-dedicated support industries and partial copyright industries, respectively. Both nominal and real figures confirm that value added of copyright industries is generated primarily by core copyright industries.

When the 5-year real value added of copyright industries is compared with the relevant GDP trend, the former demonstrated strong resilience even during periods of economic fluctuations. In 2020, while real GDP decreased by 0.7%, the value added of copyright industries increased by 21.6%. In 2021 and 2022, real GDP increased by 4.6% and 2.7% respectively, while the growth in the value added of copyright industries moderated to 0.7% and 1.9%. However, in 2023, real GDP increased by 1.6%, and the value added of copyright industries increased by 20.3%. As a result, the average annual growth rate between 2019 and 2023 was 2.0% for real GDP and 10.7% for the real value added of copyright industries, indicating that copyright industries consistently outperformed overall economic growth.

Within core copyright industries, real value added expanded steadily between 2020 and 2023, with the "software and database" sector serving as the primary driver of growth. The "software and database" sector's real value added increased from approximately KRW 81 trillion in 2020 to approximately KRW 103 trillion in 2023, driving up the value added of core copyright industries. The "press and literature" and "music, theatrical, and other performing arts" sectors also exhibited substantial growth in 2023, contributing to the expansion of value added within core copyright industries. The proportion of employment varied across sectors, illustrating how structural differences in production between technology/platform-based sectors and labor-intensive sectors translate into gaps in labor productivity.

In 2023, employment in copyright industries totaled 2,295,655 people, accounting for 8.1% of total employment. Of this total, core copyright industries employed 1,515,776 people, representing 5.3% of total employment. Over the past five years, employment in copyright industries increased by 23.5% in 2020, followed by a 2.8% decline in 2021. Employment returned to modest growth in 2022, increasing by 0.5%, before declining by 0.9% in 2023. Despite the decline in 2023, the overall employment base remained stable, suggesting a gradual adjustment rather than a sharp contraction as changes in production and distribution structures continued to

be reflected in employment patterns.

In summary, copyright industries remained an important contributor to the Korean economy in 2023, accounting for a significant share of both value added and employment. Growth in core copyright industries was driven primarily by the "software and database" sector, which continued to support the expansion of overall value added. Employment in copyright industries also expanded over the period, and despite a slight decline in 2023, the overall employment base remained stable.



Chapter 1

Introduction

1.1 Background

1.2 Scope and Method

1.3 Report Structure

Introduction

1.1 Background

Copyright industries are industrial sectors based on creative activities and copyrighted works. Economic transactions using copyright and the generation of value added depend on the protection of copyright. WIPO (2003; 2015) defines these sectors as "copyright-based industries," while the literature generally describes them as industries in which copyright plays a significant role in economic activity and industrial development.

Advances in technological innovation and the digital transformation of the global economy have accelerated the creation and production of copyrighted works across national boundaries, contributing to the continued growth of copyright industries. As copyrighted works generate economic value across a wide range of industries, the importance of copyright industries has increased steadily. In this context, understanding the economic contribution of copyright industries has become an important area of research, making it essential to systematically measure and analyze their growth and economic impact.

Since around 2010, particularly with the emergence of the Fourth Industrial Revolution, many countries, including the United States, have sought to quantify the economic significance of copyright from an industrial perspective and to use such information as a basis for policymaking. In Korea, the Copyright Industry Special Classification was established in 2011 in accordance with international standards, and annual studies on the economic contribution of copyright industries have been conducted since 2013 based on this classification.

The analysis of the economic contribution of copyright industries aims to produce foundational statistical data utilized across diverse domains, including comparing global

economic trends and development levels among countries regarding copyright, enhancing the competitiveness of copyright industries, and informing investment decisions and trade strategy formulation. In addition, these data provide an important statistical basis for developing effective policies that support and promote creative activities.

1.2 Scope and Method

Copyright industries, which are the focus of this research, are defined in existing literature as "industries that operate based on copyright protection" or "industries whose existence depends on copyright." Strictly, WIPO's term is "copyright-based industries," however, for readability, this report uses "copyright industries" throughout.

Copyright refers to "the right of a person who has created a work protected by law - such as novels, poems, music, and visual arts - to permit or prohibit others from using the work in certain ways as prescribed by law, including reproduction, performance, exhibition, broadcasting, or transmission"¹⁾(Lim Won-seon, 2022). In other words, it refers to rights granted to the creator of a work that expresses the thoughts or feelings of a person.

An industry is defined as "a collection of production units primarily engaged in industrial activities of similar nature," and industrial activity is defined as "a series of processes of activities in which each production unit inputs resources such as labor, capital, and raw materials to produce or provide goods or services." The scope of industrial activity includes both for-profit and non-profit activities; however, household domestic activities are excluded.²⁾

The copyright industries examined in this report are not limited solely to the economic scale of producing works. Rather, copyright industries refer to the scale of industries engaged in the creation and utilization of works, as well as the economic activities that support both of these activities. To measure the broad economic contribution of copyright industries for research purposes, WIPO classified industries according to their degree of relevance to copyright (copyright factor) into four categories: core copyright industries, interdependent copyright industries, partial copyright industries, and non-dedicated support industries.

¹⁾ Generally, this refers to making a work public or accessible to the public. For example, even if musical scores are protected under the Copyright Act, there is no need to obtain permission from the copyright holder for private performance of such scores.

²⁾ Statistics Korea, "11th Korea Standard Industrial Classification," Korea Standard Industrial Classification (2024), Notice No. 2024-2 (January 1, 2024).

Core copyright industries are defined as industries wholly engaged in the creation, production, manufacturing, performance, broadcasting, transmission and exhibition, or distribution and sale of works and other protected subject matter. They include: (1) Press and literature; (2) Music, theatrical productions, and other performing arts; (3) Motion picture and video; (4) Radio and television; (5) Photography; (6) Software and database; (7) Visual and graphic arts; (8) Advertising services; and (9) Copyright collecting societies. Interdependent copyright industries – for example, relevant manufacturing or wholesale and retail industries - are engaged in the manufacture and distribution of equipment used primarily to create, produce, and use copyrighted works. They include: (1) Telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products); (2) Computers and equipment manufacturing and distribution; (3) Audio equipment and musical instruments manufacturing and distribution; (4) Photographic and cinematographic instruments manufacturing and distribution; (5) Photocopier manufacturing and distribution; (6) Blank recording material manufacturing and distribution; and (7) Paper manufacturing. Partial copyright industries comprise industries in which only a portion of activities is related to the creation, production, manufacturing, performance, broadcasting, transmission and exhibition, and distribution and sale of works. These include: (1) Apparel, textile, and footwear manufacturing and distribution; (2) Jewelry and precious metals manufacturing and distribution; (3) Other crafts distribution; (4) Furniture manufacturing and distribution; (5) Household goods, fine china and glass manufacturing and distribution; (6) Wall coverings and carpets manufacturing and distribution; (7) Toys and games manufacturing and distribution; (8) Architectural, engineering, and surveying services and interior design services; and (9) Museums and historical site management and operations. Finally, non-dedicated support industries are those in which a portion of activities facilitates the distribution, communication, or sale of copyrighted works, but which do not fall within the core copyright industries. These include: (1) General wholesale and retail trade; (2) General transportation; and (3) Communications services (Choi Jong-il, 2024).

This report classifies copyright industries into four categories and estimates sales, value added, and employment for each category. Table 1-1 presents the definition of these categories. Based on this classification framework, the report analyzes the structure and economic contribution of Korea's copyright industries.

[Table 1-1] Definition of Copyright Industries by Category

Category	Definition
Core copyright industries	The core copyright industries are industries that are wholly engaged in creation, production and manufacturing, performance, broadcast, communication and exhibition, or distribution and sales of works and other protected subject matter.
Interdependent copyright industries	Interdependent copyright industries are industries that are engaged in production, manufacture and sale of equipment whose function is wholly or primarily to facilitate the creation, production or use of works and other protected subject matter.
Partial copyright industries	The partial copyright industries are industries in which a portion of the activities is related to works and other protected subject matter and may involve creation, production and manufacturing, performance, broadcast, communication and exhibition or distribution and sales.
Non-dedicated support industries	The non-dedicated support industries are industries in which a portion of the activities are related to facilitating broadcast, communication, distribution or sales of works and other protected subject matter, and whose activities have not been included in the core copyright industries

Source: WIPO (2003; 2015) and Ministry of Culture, Sports and Tourism (2012). Definitions are given at the major category level.

1.3 Report Structure

This report is organized as follows. Chapter 1 provides an introduction to the study, including its background, scope, and structure. Chapter 2 describes the methodology used to estimate the economic contribution of Korea's copyright industries. Based on the WIPO *Guide on Surveying the Economic Contribution of the Copyright-Based Industries* (WIPO, 2003; 2015) and the Copyright Industry Special Classification of Korea, this chapter presents the definitions and classifications of copyright industries, the copyright factors applied to each sector, and the procedures used to estimate their economic contribution. Chapter 3 examines sales, value added, and employment across the four categories of copyright industries: core copyright industries, interdependent copyright industries, partial copyright industries, and non-dedicated support industries. Chapter 4 analyzes trends in the economic contribution of copyright industries over the period 2019–2023 and compares their performance across sectors. Finally, Chapter 5 summarizes the report results and presents related implications.



Chapter 2

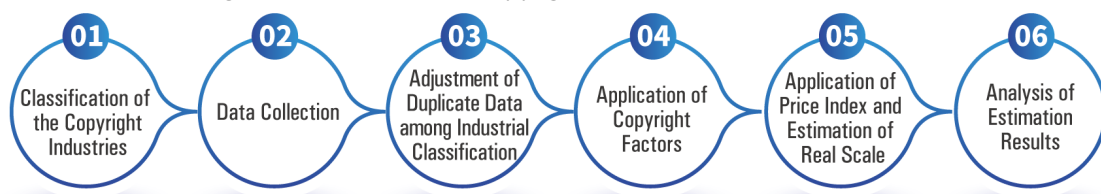
Assessing the Economic Contribution of Copyright Industries

- 2.1 Definition of Copyright Industries and Industrial Classification
- 2.2 Data Collection
- 2.3 Adjustment for Double Counting
- 2.4 Application of Copyright Factors
- 2.5 Estimation of Real Values

Assessing the Economic Contribution of Copyright Industries³⁾

In order to measure the scale of copyright industries, the following six steps are taken.

[Figure 2-1] Flowchart of Copyright Industries Scale Measurement



This chapter describes the definition of copyright industries and the methodology used to estimate their economic contributions, following the six-step analysis process presented in Figure 2-1.

2.1 Definition of Copyright Industries and Industrial Classification

2.1.1 Copyright industries: Copyright-based industries

Before describing the methodology used to estimate the economic contribution of copyright industries, it is necessary to establish a conceptual understanding of what constitutes a copyright industry. According to WIPO (2015; 2023)⁴⁾, various concepts have been developed to define and

³⁾ This chapter discusses the methodology for measuring the economic contribution of the copyright industries. The Korea Copyright Commission has maintained substantially the same methodology since 2013 when it began conducting its own study on the economic contribution of copyright industries (This report mainly referred to Survey on the Economic Contribution of Korean Copyright Industries (2020), Korea Copyright Commission).

⁴⁾ World Intellectual Property Organization, *Guide on Surveying the Economic Contribution of the Copyright-Based Industries*, rev. ed.

measure economic activities related to creativity, including copyright industries and related sectors such as cultural industries and creative industries.⁵⁾ Because each concept focuses on different aspects of economic activity, its scope and definition may vary depending on the purpose of the analysis and the classification framework employed. Accordingly, the definitions of copyright industries, cultural industries, and creative industries are discussed below.

Copyright industries refer to industries in which copyright plays an essential role. In this context, an “essential role” refers to the creation of commercial value through economic activities related to the production, distribution, and use of copyright-related goods and services. WIPO (2003; 2015) more specifically refers to these industries as copyright-based industries. Cultural industries are defined as goods and services containing culturally significant content that can be reproduced or disseminated on an industrial scale. This concept focuses on the production and delivery of cultural content, regardless of whether commercial value is generated. Creative industries are defined as industries based on individual creativity, skills, and talent that have the potential to generate wealth and employment through the creation and exploitation of intellectual property.⁶⁾

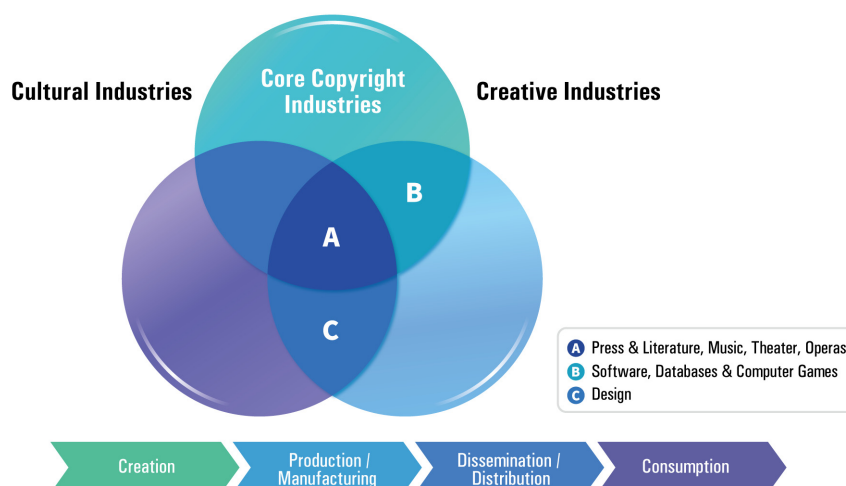
Based on the above definitions, WIPO (2003; 2015) classifies copyright industries into four categories in order to capture the broad range of economic activities associated with copyrights. These categories are determined according to the copyright factor, which measures the degree to which economic activities rely on copyright. The four categories are core copyright industries, interdependent copyright industries, partial copyright industries, and non-dedicated support industries. The Figure below presents the scope of each category.

(Geneva: WIPO, 2015).

⁵⁾ UNESCO Institute for Statistics, The 2009 UNESCO Framework for Cultural Statistics (FCS) (Montreal: UNESCO Institute for Statistics, 2009). The initial FCS was established in 1986 and has been revised several times since.

⁶⁾ Department for Culture, Media and Sport. *Creative Industries Economic Estimates: Full Statistical Release* (London: DCMS, 2011).

[Figure 2-2] Scope of Core Copyright Industries, Cultural Industries, and Creative Industries⁷⁾



Definition of copyright industries:

Industries engaged in the creation, production, performance, broadcasting, exhibition, or distribution—including wholesale and retail—of creative works and protected materials (such as literary works, music, fine art, architectural design, films, and software), as well as industries where copyright protection plays an essential role in their operation and economic viability.

2.1.2 Setting the industrial classification: Korean Standard Copyright Industrial Classification (KSCIC)

The first step that must be accomplished to estimate the economic contribution of copyright industries as defined above is to establish the sectoral classification of copyright industries and identify the industries included in each sector.

This study established industry classifications by linking the "Korea Standard Industrial Classification (KSIC)" of the Ministry of Data and Statistics⁸⁾ to industry codes corresponding to

⁷⁾ World Intellectual Property Organization, *How to Make a Living in the Creative Industries* (Geneva: WIPO, 2017).

⁸⁾ Statistics Korea was reorganized as the Ministry of Data and Statistics, a central administrative agency under the Prime Minister, following the amendment to the Government Organization Act of 1 October 2025. In this report, to reflect the circumstances at the time of enactment and amendment, "Statistics Korea" is used as the primary name, with "Ministry of Data and Statistics" also indicated when necessary.

the Korean Standard Copyright Industrial Classification (KSCIC) in order to identify domestic copyright industries. The Korea Standard Industrial Classification (KSIC) groups industrial activities performed by businesses and other production units systematically according to similarities. Additionally, KSIC is a classification for statistical purposes prepared by Statistics Korea on the basis of the International Standard Industrial Classification (ISIC) recommended by the UN, in order to ensure accuracy of statistical data and comparability among countries as required by the Statistics Act.⁹⁾ Since its enactment in 1963 (mining and manufacturing) and 1964 (industries other than mining and manufacturing), KSIC has been continuously revised to reflect and supplement domestic industrial circumstances or amendments to ISIC.

To analyze the economic contribution of copyright industries, the Ministry of Culture, Sports and Tourism established KSCIC in 2011 based on the framework proposed by WIPO. At that time, growing interest in copyright industries and the expansion of related sectors highlighted the need for a systematic statistical framework. In addition, developments such as the expansion of free trade agreements (FTAs) and the increasing economic significance of copyright industries further strengthened the demand for reliable statistical data. However, the absence of a statistical framework necessary for measuring copyright industries suited to domestic circumstances made it difficult to measure the economic ripple effects.¹⁰⁾ Accordingly, the Ministry of Culture, Sports and Tourism established a copyright industry special classification system tailored to domestic circumstances by referring to WIPO's comprehensive scope of copyright industries, and it was approved as a national official classification by Statistics Korea in 2011. KSCIC was revised¹¹⁾ for the first time in 2018 in accordance with the enactment and implementation of the 10th revision of KSIC¹²⁾, and was revised¹³⁾ for the second time in 2025 in accordance with the enactment and implementation of the 11th revision of KSIC.

⁹⁾ Statistics Korea, "Overview of Korea Standard Industrial Classification," Statistical Classification Portal, accessed December 27, 2021, <https://kssc.kostat.go.kr:8443>.

¹⁰⁾ Ministry of Culture, Sports and Tourism (2012).

¹¹⁾ Statistics Korea, Notice of the 10th Revised Classification, Notice No. 2017-13 (January 13, 2017; effective July 1, 2017).

¹²⁾ Statistics Korea, Notice of the 11th Revised Classification, Notice No. 2024-2 (January 1, 2024; effective July 1, 2024).

¹³⁾ Statistics Korea, Notice of the 2nd Revision of Copyright Industry Special Classification, Notice No. 2025-547 (2025).

KSCIC used for estimating the economic contribution of copyright industries consists of four levels. The first level represents the four major categories of WIPO copyright industries presented earlier, and each category is assigned a one-digit main category code. The second level consists of three-digit middle category codes corresponding to the 54 detailed items in the Guidelines. The third level is the sub-category and the fourth, detailed classification, with five-digit and seven-digit classification codes, respectively. Examples of the above explanation are presented in the following table.

This study estimates the scale of copyright industries based on an official concordance table linking KSIC and KSCIC to enhance the accuracy and comparability of the domestic copyright industry economic contribution analysis through the aggregation of official statistics.

[Table 2-1] KSCIC Code System (Example)

Category	Copyright Industries		
	Classification Code	Classification Name	Definition
Level 1	1	Core copyright industries	First domain among WIPO Guide's (2003) four comprehensive categories
Level 2	101	Press and literature	Following WIPO Guide's (2003) 54 detailed items
Level 3	10101	Writing and translation activities	Main creative activities in publishing and literature field
Level 4	1010101	Literary artists	Artists independently engaged in non-performing art activities in publishing and literature field (incl. one-person business activities)
	1010102	Translation services	Industrial activities providing translation services in publishing and literature field

Source: Ministry of Culture, Sports and Tourism (2012), reflecting the second revision of KSCIC.

2.2 Data Collection

The economic contribution of copyright industries is estimated using statistical data compiled in accordance with the official concordance table linking KSCIC and KSIC. The analysis is based on official statistics published by the Bank of Korea and Statistics Korea, including data on sales and employment according to each industry classification. For consistency and comprehensive coverage, the Economic Census serves as the primary data source, providing detailed information on the structure, distribution, and business conditions of industries across the economy. However, because the Economic Census is conducted every five years, it cannot serve as the sole source for annual estimates. Accordingly, for years in which the Economic Census is not available, annual industry-specific surveys and processed statistics published by Statistics Korea and the Bank of Korea are used to supplement the analysis. Accordingly, this report sets 2023 as the base year for calculation and analyzes trends over the past five-year period (2019–2023). The following outlines the methodology applied to each data aggregation item.

2.2.1 Sales and employment

The primary source of data on sales and employment is the Economic Census. Because the Economic Census is conducted every five years, the results of the 2020 census were published in 2022, while the results of the 2025 census will be available for use in the 2027 study on the economic contribution of copyright industries. Since the reference year of this study (2023) did not coincide with an Economic Census year, data published by Statistics Korea, including the Mining and Manufacturing Survey, the Service Industry Survey, the Wholesale and Retail Trade Survey, ICT Statistics, and the Transport Industry Survey, were used. Among these sources, the Mining and Manufacturing Survey covers only establishments with 10 or more employees. Accordingly, sales figures were adjusted to include establishments with one or more employees using information on sales and employment for establishments with 1–9 employees from the Economic Census. Sales data from the Service Industry Survey and the Transport Industry Survey¹⁴⁾

were compiled for the corresponding industries. However, for wholesale and retail trade industries, sales were adjusted by deducting the cost of goods sold from gross sales reported in the Wholesale and Retail Trade Survey.¹⁵⁾

In addition, industries for which reliable aggregation was not possible were excluded from the analysis to avoid overestimating the size of copyright industries.¹⁶⁾ The primary reason for the limited availability of statistical data was the timing mismatch between revisions to the KSCIC–KSIC concordance table and the publication of statistical data based on the revised KSIC. However, by the time of the 2022 study, which analyzed copyright industries using 2020 data, both the revised KSCIC–KSIC concordance table and the corresponding statistical data based on the 10th Revision of KSIC had become available. As a result, the number of industries requiring the use of proxy values or exclusion from the analysis has been substantially reduced.

Employment data used to estimate employment in copyright industries were obtained from the same industry surveys used for the collection of sales data. To calculate the share of copyright industry employment in the national economy, total employment figures were obtained from the Economically Active Population Survey published by the Ministry of Data and Statistics.

¹⁴⁾ For sales revenue data of railway transport in the Transport Industry Survey, the report uses the 2020 Transport Industry Survey Report and Statistics Korea's transport industry data.

¹⁵⁾ In the case of wholesale and retail trade, sales revenue, which is the final sales amount of goods, is greatly affected by the price of products (items for sale), and it would be unreasonable to regard this as net sales from distribution transactions. Therefore, for wholesale and retail trade, sales revenue was aggregated as the difference between gross sales and cost of sales (Yu Sang-hee, *Survey on Economic Contribution of Korean Copyright Industries* (Jinju: Korea Copyright Commission, 2014).

¹⁶⁾ In 2016, statistics from the Mining and Manufacturing Survey were compiled and published based on the 10th revision of the Korea Standard Industrial Classification (KSIC). However, because the KSCIC–KSIC concordance table was not revised accordingly, the criteria for compiling certain detailed classification items had to be adjusted. Consequently, for classifications where data collection was not feasible, calculation methods were chosen from the following three options based on which best aligned with industrial definitions, resulting in some detailed classification items being understated: ① When statistical data collection for a given classification was not possible under the "10th KSIC Revision" ("excluded"), collectible statistical values from the same classification were included in the calculation. However, figures for this classification may be understated compared to previous years; ② When statistical data for a given classification under the "10th KSIC Revision" were consolidated at the group (3-digit) or division (2-digit) level ("consolidated"), statistics were compiled at the group level. However, values at the detailed classification level (5-digit) were left unlisted, with adjacent cells being merged or marked as N/A (indicating unavailable, unknown, or confidential data); ③ When data collection remained unfeasible through the above methods, no aggregation was made (applicable to smart card manufacturing and knitted/crocheted goods manufacturing). (Kim Seon-hoe, *Survey on Economic Contribution of Korean Copyright Industries* (Jinju: Korea Copyright Commission, 2018).

2.2.2 Value added

The *Economic Census*, which serves as the primary source of data for this study, does not provide information on value added. Accordingly, to calculate the economic contribution using the Economic Census data, value-added ratios for each sector are independently derived by mapping copyright industry classifications to the industry classifications of the Bank of Korea's extended Input-Output Tables for that year.¹⁷⁾ These ratios are subsequently applied to the revenue data of each industry to estimate value added.¹⁸⁾ For years when the Economic Census was not conducted, including the reference year of this study, value-added data reported in sources such as the Mining and Manufacturing Survey and Transport Industry Survey were used directly for the corresponding industry classifications. For surveys that do not provide value-added data, including the Service Industry Survey, the Wholesale and Retail Trade Survey, and ICT Statistics, value added was estimated by applying value-added ratio derived from the Input-Output Tables to sales data. To calculate the share of copyright industries in total domestic value added, data on gross domestic product (real and nominal GDP) and total value added for the Korean economy were obtained from the national accounts statistics published by the Bank of Korea.

$$\text{Value added} = \text{Sales} \times \text{value-added ratio}$$

2.2.3 Labor productivity

Labor productivity measures the amount of value added generated per unit of labor input and is expressed as a ratio of output in relation to the labor input. It serves as an indicator of economic efficiency and a basis for comparing performance across sectors. Higher labor productivity indicates that more value added is generated with the same level of labor input, or that the same level of output is produced with less labor input. In this study, labor productivity is calculated using real value added for each sector.

¹⁷⁾ Bank of Korea's Economic Statistics System (<http://ecos.bok.or.kr/>).

¹⁸⁾ Value-added ratios were calculated based on the most current Input-Output Tables (2020 extended tables) according to the Bank of Korea's publication schedule.

$$\text{Labor productivity} = \frac{\text{Value added}}{\text{No. of employees}}$$

2.3 Adjustment for Double Counting

Because KSCIC and KSIC differ in structure and scope, some industries may overlap during the concordance process. For example, the KSIC category "non-performing artists (KSIC code: 90132)" is linked to multiple categories within the core copyright industries under KSCIC, including "authors and translators (including one-person business activities)," "music and theater-related artists (excluding performers)," "motion picture and video artists (excluding actors)," "photographers," and "visual artists and related artists."

If such overlapping classifications are used without adjustment, the values associated with "non-performing artists (classification code: 90132)" may be double counted, resulting in an overstatement of the economic size of copyright industries. Similar cases of overlapping classifications have also been identified in sectors such as wholesale and retail trade and communications services. To prevent overestimation arising from such duplication, an adjustment procedure for double counting is required.

Accordingly, the adjustment procedures described below were applied to overlapping classifications in order to minimize the possibility of overestimation of the results.

2.3.1 Adjustment for double counting within the same main category

For duplicate classifications within the same main category, the corresponding value is apportioned equally across all duplicated classifications.

$$\text{Sales, value added, number of employees (double counting corrected)} = \frac{\text{Sales, value added, number of employees}}{\text{Number of duplicate classifications}}$$

2.3.2 Adjustment for double counting among different main categories

For classifications duplicated across different main categories, duplicate values assigned to lower-ranked categories are excluded according to the ranking system presented in Table 2-2, and the data are assigned only to the industry classification belonging to the highest-ranking main category. However, where an industry classification more appropriately corresponds to the definition of a lower-ranked main category, the classification is assigned to that category, and the value linked to the higher-ranking category is excluded.¹⁹⁾

[Table 2-2] Ranks Applied to Double Counting Across Main Categories

Rank	Main Category
1	Core copyright industries
2	Interdependent copyright industries
3	Partial copyright industries
4	Non-dedicated support industries

2.4 Application of Copyright Factors

The copyright factor is a weighting factor that indicates the extent to which the economic activities of a particular industry are attributable to or dependent on copyright. To ensure consistency in estimating the economic contribution of copyright industries, copyright factors are applied to exclude the portion of economic activity that is not attributable to copyright. According to WIPO (2003; 2015, hereinafter the *Guidelines*), copyright factors are applied differently across the four categories of copyright industries: core copyright industries, interdependent copyright industries, partial copyright industries, and non-dedicated support industries.

¹⁹⁾ A representative example is “wireless and satellite communications”, which has overlapping connections with both core copyright industries and non-dedicated support industries. However, the 2nd version of KSCIC does not seem to include such overlap.

First, by definition, core copyright industries are industries engaged entirely in copyright-related activities. Accordingly, a copyright factor of 100% (factor = 1.0) is applied uniformly to all core copyright industries.

Second, interdependent copyright industries, like core copyright industries, are industries whose activities are entirely or primarily related to copyright. Therefore, a copyright factor of 100% (factor = 1.0) is also applied to interdependent copyright industries in this study.

Third, the method used to determine the copyright factor for partial copyright industries varies across countries. In general, countries either conduct surveys of relevant industries to derive copyright factors directly or adopt copyright factors previously estimated in countries with similar industrial structures. In Korea, the copyright factor applied to partial copyright industries was initially based on the Singaporean copyright factor, as reported in the 2009 study *Statistical Analysis of the Scale of Korean Copyright Industries*, rather than being estimated directly through a survey.²⁰⁾ However, in subsequent surveys,²¹⁾ the copyright factors for the various partial copyright industries (as of 2025) presented in Table 2-3, which were directly calculated through the *Survey on Copyright Factor of Partial Copyright Industries*, were applied.²²⁾ Therefore, time series interpretation requires care because the copyright factors changed between 2022 and 2023.

Fourth, for non-dedicated support industries, the copyright factor is derived by applying the following copyright factor formula in accordance with the commission's calculation manual (Choi Jong-il, 2012).²³⁾

$$\text{Copyright factors of the non-dedicated support industries} = \frac{\text{Value added of the (Core + Interdependent + Partial copyright industries)}}{(\text{GDP}) - (\text{Value added of transportation industries} + \text{Wholesale and retail trade})}$$

²⁰⁾ Choi Jong-il et al., *Statistical Analysis of the Scale of Korean Copyright Industries* (Seoul: Korea Copyright Commission, 2010).

²¹⁾ This refers to the survey on the economic contribution of copyright industries conducted by the Korea Copyright Commission since 2013.

²²⁾ Korea Copyright Commission, *2013 Survey on Copyright Factors of Partial Copyright Industries* (Seoul: Korea Copyright Commission, 2013); *2016 Survey on Copyright Factors of Partial Copyright Industries* (Jinju: Korea Copyright Commission, 2016); *2025 Survey on Copyright Factors of Partial Copyright Industries* (Jinju: Korea Copyright Commission, 2025).

²³⁾ Choi Jong-il, *Manual for Calculating the Scale of Copyright Industries* (Seoul: Korea Copyright Commission, 2012),

The copyright factor for non-dedicated support industries is calculated using the methodology described above. Specifically, it is based on the assumption that the share of value added from core copyright industries, interdependent copyright industries, and partial copyright industries in Korea's gross domestic product (GDP), excluding transport and wholesale and retail trade, is equally applied to non-dedicated support industries.

Table 2-3 presents the copyright factors for the four main categories of copyright industries in Korea.

[Table 2-3] Copyright Factors of Korea's Copyright Industries by Category

Category	Copyright Factors				
Core copyright industries	100%				
Interdependent copyright industries	100%				
Partial copyright industries ²⁴⁾	Apparel, textile, and footwear manufacturing and distribution				6.4%
	Jewelry and precious metals manufacturing and distribution				5.2%
	Other crafts distribution				12.0%
	Furniture manufacturing and distribution				9.0%
	Household goods, fine china and glass manufacturing and distribution				9.8%
	Wall coverings and carpets manufacturing and distribution				8.7%
	Toys and games manufacturing and distribution				11.7%
	Architectural, engineering, and surveying services				6.9%
	Interior design services				23.7%
	Museums and historical site management and operations				16.1%
Non-dedicated support industries	2019 9.6%	2020 12.0%	2021 9.6%	2022 9.6%	2023 12.3%

Note: The copyright factors are expressed as weights.

²⁴⁾ Athena Company, 2025 Survey on Copyright Factors of Partial Copyright Industries (Jinju: Korea Copyright Commission, 2025).

2.5 Estimation of Real Values

The economic contribution of copyright industries is estimated using both nominal and real values, with the GDP as the reference framework. Nominal values are commonly used to measure the size of economic activity and are useful for assessing indicators such as market size and purchasing power. However, nominal values are affected by changes in prices and may increase or decrease even in the absence of actual economic growth or contraction. In other words, because nominal values reflect price fluctuations, they can change just from price only, not from increase or decrease of economic activity. Since one of the primary objectives of this study is to analyze growth trends in copyright industries, real values are essential for assessing changes in their economic contribution and their growth trajectory over time, requiring the use of real values with their price fluctuation factor eliminated. Accordingly, this report presents both nominal and real estimates in order to provide a comprehensive assessment of the economic contribution of copyright industries.

Real values for the economic contribution of copyright industries are estimated by applying the relevant price indices to nominal estimates. Where price indices are directly available, items in the Producer Price Index are linked to the corresponding industry classifications in the Korean Standard Copyright Industrial Classification (KSCIC) and applied accordingly.²⁵⁾ Where direct price indices are not available, price indices are derived separately using current-price and constant-price indices and then applied to the nominal estimates.²⁶⁾

²⁵⁾ Bank of Korea Producer Price Survey Statistics.

²⁶⁾ Ministry of Data and Statistics "Service Industry Trend Survey" Statistics.



Chapter 3

Analyzing the Economic Contribution of Copyright Industries

- 3.1 Overview of Copyright Industries
- 3.2 Core Copyright Industries
- 3.3 Interdependent Copyright Industries
- 3.4 Partial Copyright Industries
- 3.5 Non-Dedicated Support Industries

Analyzing the Economic Contribution of Copyright Industries

3.1 Overview of Copyright Industries

3.1.1 Overview of the economic contribution of copyright industries in 2023

Table 3-1 presents an overview of the economic size and contribution of copyright industries by sector. The value added of all copyright industries reached KRW 265 trillion in 2023, an increase of KRW 30 trillion from the previous year. Their share of GDP rose to 11.0%, up from 10.1% in 2022. Employment in all copyright industries totaled 2,295,655 people, accounting for 8.1% of total employment and decreasing 0.1 percentage point compared with the previous year.

Core copyright industries generated KRW 169 trillion in value added, an increase of KRW 9 trillion from the previous year. Their share of GDP reached 7.0%, up 0.1 percentage point from 2022. Employment in core copyright industries totaled 1,515,776 people, accounting for 5.3% of total employment and decreasing 0.1 percentage point from the previous year.

The value added of interdependent copyright industries reached KRW 62 trillion in 2023, an increase of KRW 20 trillion from the previous year. Their share of GDP rose to 2.6%, up 0.8 percentage points from 2022. Employment totaled 329,162 people, accounting for 1.2% of total employment - down 0.1 percentage point from the previous year.

The value added of partial copyright industries reached KRW 10 trillion in 2023, a decrease of KRW 5 trillion from the previous year. Their share of GDP was 0.4%, down 0.2 percentage points from 2022. Employment totaled 108,566 people, accounting for 0.4% of total employment, which is a decrease of 0.2 percentage points from the previous year.

The value added of non-dedicated support industries reached KRW 24 trillion in 2023, an increase of KRW 6 trillion from the previous year. Their share of GDP was 1.0%, up 0.2 percentage points from 2022. Employment totaled 342,151 people, accounting for 1.2% of total employment and increasing 0.3 percentage points from the previous year.

[Table 3-1] Economic Size and Contribution of Copyright Industries, 2023

(Unit: KRW 1 million, number of people)

Category		Size			Contribution	
		Sales	Value Added	Employment	Share in Value Added	Share in Employment
Core copyright industries	Nominal	315,144,581	168,747,521	1,515,776	7.0%	5.3%
	Real	299,216,981	160,214,690		7.1%	
Interdependent copyright industries	Nominal	151,350,022	62,468,360	329,162	2.6%	1.2%
	Real	164,491,339	66,883,259		3.0%	
Partial copyright industries	Nominal	18,218,619	9,851,872	108,566	0.4%	0.4%
	Real	16,745,275	8,929,086		0.4%	
Non-dedicated support industries	Nominal	48,830,645	24,318,797	342,151	1.0%	1.2%
	Real	42,553,723	21,196,811		0.9%	
All copyright industries	Nominal	533,543,867	265,386,550	2,295,655	11.0%	8.1%
	Real	523,007,318	257,223,846		11.4%	
Total economy	Nominal	-	2,408,687,400	28,416,000	-	-
	Real	-	2,247,177,700		-	

Note: Total economy value added refers to Gross Domestic Product (GDP), and employment refers to the number of employed people according to the Economically Active Population Survey.

Source: 1) Bank of Korea Economic Statistics System (<http://ecos.bok.or.kr>)

2) Statistics Korea National Statistical Portal (<http://kosis.kr>)

3.1.2 Sales

In 2023, sales of copyright industries as a whole totaled KRW 534 trillion in nominal terms and KRW 523 trillion in real terms. By category, sales were highest in core copyright industries, followed by interdependent copyright industries, non-dedicated support industries, and partial copyright industries.

In nominal terms, core copyright industries generated KRW 315 trillion in sales, accounting

for 59.1% of total sales in copyright industries, while interdependent copyright industries generated KRW 151 trillion, accounting for 28.4%. Together, these two categories represented 87.5% of total sales in copyright industries (Figure 3-1). Non-dedicated support industries accounted for KRW 49 trillion (9.2%), while partial copyright industries accounted for KRW 18 trillion (3.4%).

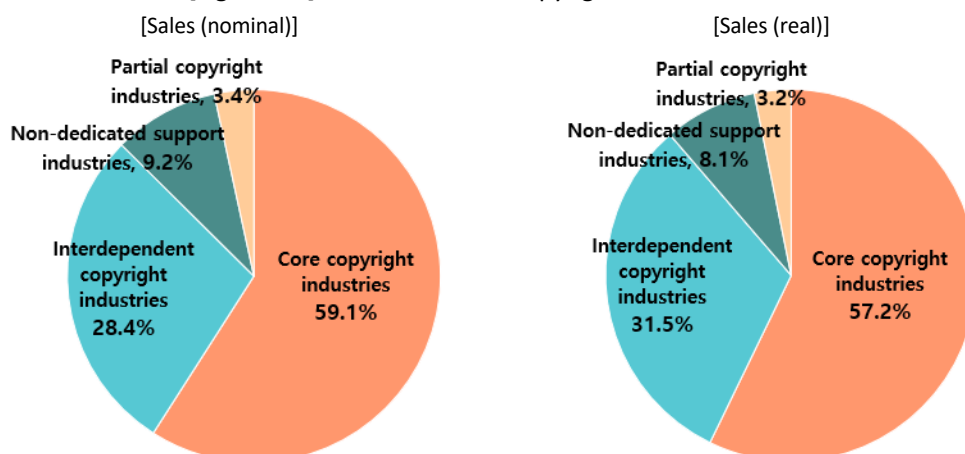
In real terms, core copyright industries accounted for 57.2% of total sales, while interdependent copyright industries accounted for 31.5%. Together, these two categories represented 88.7% of total real sales in copyright industries (Figure 3-1). Compared with the previous year, real sales increased by KRW 30 trillion in core copyright industries and by KRW 45 trillion in interdependent copyright industries. By contrast, real sales in partial copyright industries decreased by KRW 8 trillion, while those in non-dedicated support industries increased by KRW 4 trillion.

[Table 3-2] Sales in Copyright Industries, 2023

(Unit: KRW 1 million, %)

Category	Nominal Sales	Share	Real Sales	Share
Core copyright industries	315,144,581	59.1%	299,216,981	57.2%
Interdependent copyright industries	151,350,022	28.4%	164,491,339	31.5%
Partial copyright industries	18,218,619	3.4%	16,745,275	3.2%
Non-dedicated support industries	48,830,645	9.2%	42,553,723	8.1%
Copyright industries	533,543,867	100.0%	523,007,318	100.0%

[Figure 3-1] Share of Sales in Copyright Industries, 2023



3.1.3 Value added

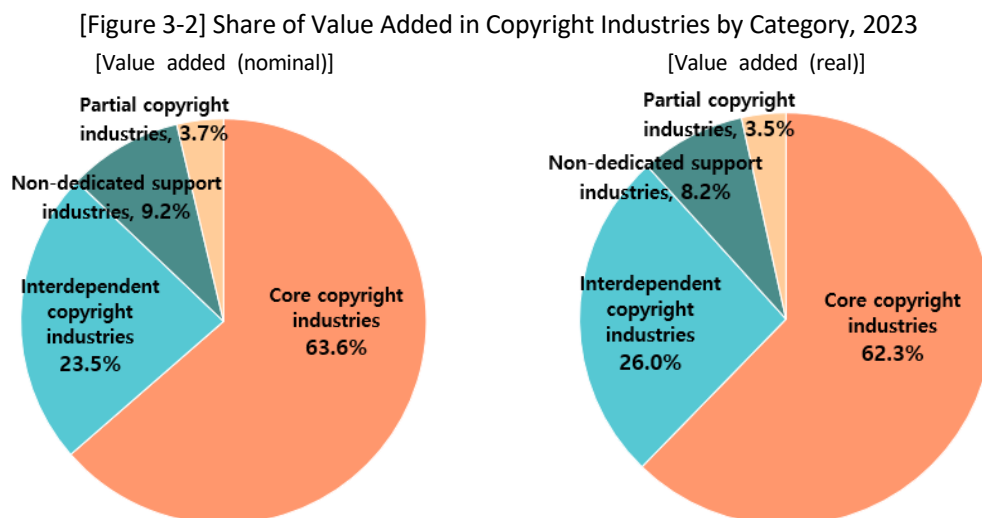
The value added of copyright industries reached KRW 265 trillion in nominal terms and KRW 257 trillion in real terms in 2023. In nominal terms, core copyright industries generated KRW 169 trillion in value added, accounting for 63.59% of total value added in copyright industries, while interdependent copyright industries generated KRW 62 trillion, accounting for 23.54%. Together, these two categories accounted for KRW 231 trillion, or 87.13% of total value added in copyright industries (Figure 3-2). Partial copyright industries generated KRW 10 trillion (3.71%), while non-dedicated support industries generated KRW 24 trillion (9.16%).

In real terms, core copyright industries generated KRW 160 trillion in value added, accounting for 62.29% of total value added in copyright industries, while interdependent copyright industries generated KRW 67 trillion, accounting for 26.00%. Together, these two categories accounted for KRW 227 trillion, or 88.29% of total value added in all copyright industries (Figure 3-2). The real value added of partial copyright industries was KRW 9 trillion (3.47%), while that of non-dedicated support industries was KRW 21 trillion (8.24%). Meanwhile, compared with their share of total sales, core copyright industries accounted for a relatively high proportion of value added, whereas interdependent copyright industries exhibited a relatively low proportion.

[Table 3-3] Value Added in Copyright Industries, 2023

(Unit: KRW 1 million, %)

Category	Nominal Value Added	Share	Real Value Added	Share
Core copyright industries	168,747,521	63.59%	160,214,690	62.29%
Interdependent copyright industries	62,468,360	23.54%	66,883,259	26.00%
Partial copyright industries	9,851,872	3.71%	8,929,086	3.47%
Non-dedicated support industries	24,318,797	9.16%	21,196,811	8.24%
Copyright industries	265,386,550	100.00%	257,223,846	100.00%



3.1.4 Employment

Employment in Korea's copyright industries totaled 2,295,655 people in 2023, a decrease of 14,770 people from the previous year. Core copyright industries employed 1,515,776 people, accounting for 66.03% of total employment in copyright industries. They were followed by non-dedicated support industries with 342,151 people (14.90%), interdependent copyright industries with 329,162 people (14.34%), and partial copyright industries with 108,566 people (4.73%). Total employment in copyright industries declined by 0.9% in 2023 compared with the previous year. By category, employment decreased in core copyright industries (-1.0%), interdependent copyright industries (-8.9%), and partial copyright industries (-35.0%). Non-dedicated support industries, meanwhile, continued to account for a relatively large share of total employment in copyright industries (14.90%).

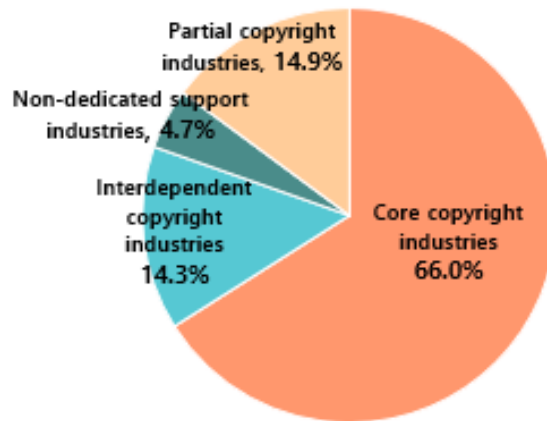
[Table 3-4] Employment in Copyright Industries, 2023

(Unit: No. of people, %)

Category	Employment	Share
Core copyright industries	1,515,776	66.03%
Interdependent copyright industries	329,162	14.34%

Category	Employment	Share
Partial copyright industries	108,566	4.73%
Non-dedicated support industries	342,151	14.90%
Copyright industries	2,295,655	100.00%

[Figure 3-3] Share of Employment in Copyright Industries by Category, 2023



3.2 Core Copyright Industries

3.2.1 Core copyright industries

Core copyright industries are defined as "industries engaged entirely in the creation, production, manufacturing, performance, broadcasting, transmission, and exhibition or dissemination and sale of works and other protected subject matter." As discussed earlier, all economic activities within these industries are considered fully attributable to copyright. Accordingly, a copyright factor of 100% is applied. The industry sectors classified as core copyright industries in the KSCIC are presented below.

KSCIC	Sector
101	Press and literature
102	Music, theatrical productions, and other performing arts
103	Motion picture, video
104	Radio, television
105	Photography
106	Software, database
107	Visual and graphic arts
108	Advertising services
109	Copyright collecting societies

Note: This table is based on the 2nd revision of the KSCIC (announced on July 31, 2025).

Over the 2019–2023 period, core copyright industries expanded steadily in both sales and value added in nominal terms. Sales increased from KRW 195 trillion in 2019 to KRW 315 trillion in 2023, representing an average annual growth rate of approximately 12.8%. Sales rose by 25.3% year-on-year in 2020, recording the highest growth rate during the period, and continued to increase by 7.7% and 10.3% in 2021 and 2022, respectively. In 2023, sales increased by 8.7% from the previous year. Although the pace of growth moderated, the nominal sales of core copyright industries continued to expand throughout the period.

Value added showed a similar pattern. Nominal value added increased from KRW 111 trillion in 2019 to KRW 169 trillion in 2023, representing an average annual growth rate of approximately 11.1%. Value added increased by 29.4% in 2020, the highest rate of growth during the period, before moderating to 8.7% and 2.5% in 2021 and 2022, respectively. In 2023, value added increased by 5.6%, maintaining its overall upward trend. The share of core copyright industries in GDP increased from 5.8% in 2019 to 7.5% in 2021, before declining to 6.9% in 2022 and rising again to 7.0% in 2023.

Even after adjusting for price changes, core copyright industries maintained a strong growth trajectory. Real sales increased from KRW 188 trillion in 2019 to KRW 299 trillion in 2023, representing an average annual growth rate of 12.4% over the period. Following a 22.5% increase in 2020, real sales continued to grow by 6.5% and 10.0% in 2021 and 2022, respectively. In 2023, real sales increased by 11.1%, maintaining the overall upward trend.

Real value added increased from KRW 107 trillion in 2019 to KRW 160 trillion in 2023, representing an average annual growth rate of 10.6% over the period. Value added increased by 25.9% in 2020, recording the highest growth rate during the period, before moderating to 7.6% and 2.2% in 2021 and 2022, respectively. In 2023, real value added increased by 7.9%, continuing its overall upward trend. The share of real value added in GDP increased from 5.8% in 2019 to 7.6% in 2021, before declining to 6.7% in 2022 and rising again to 7.1% in 2023.

Employment increased from 1,142,186 people in 2019 to 1,530,546 people in 2022, before declining to 1,515,776 people in 2023, a decrease of 14,770 people (-1.0%) from the previous year. As a result, the employment share declined slightly from 5.4% in 2022 to 5.3% in 2023. Nevertheless, core copyright industries continued to account for the largest share of total employment among copyright industries.

[Table 3-5] Economic Size and Contribution Trends of Core Copyright Industries(2019–2023)

(Unit: KRW 1 million, number of people)

Category		2019	2020	2021	2022	2023
Sales	Nominal	194,794,125	244,110,691	262,913,931	289,972,692	315,144,581
	Real	187,632,415	229,792,906	244,803,067	269,303,760	299,216,981
Value added	Nominal	110,886,249 (5.8%)	143,446,207 (7.4%)	155,915,538 (7.5%)	159,773,003 (6.9%)	168,747,521 (7.0%)
	Real	107,170,699 (5.8%)	134,957,162 (7.3%)	145,197,447 (7.6%)	148,461,447 (6.7%)	160,214,690 (7.1%)
Employment		1,142,186 (4.2%)	1,480,290 (5.5%)	1,503,264 (5.5%)	1,530,546 (5.4%)	1,515,776 (5.3%)

Note: 1) Real Sales & Real Value Added: Base Year 2020 = 100 (PPI, Index of Services)

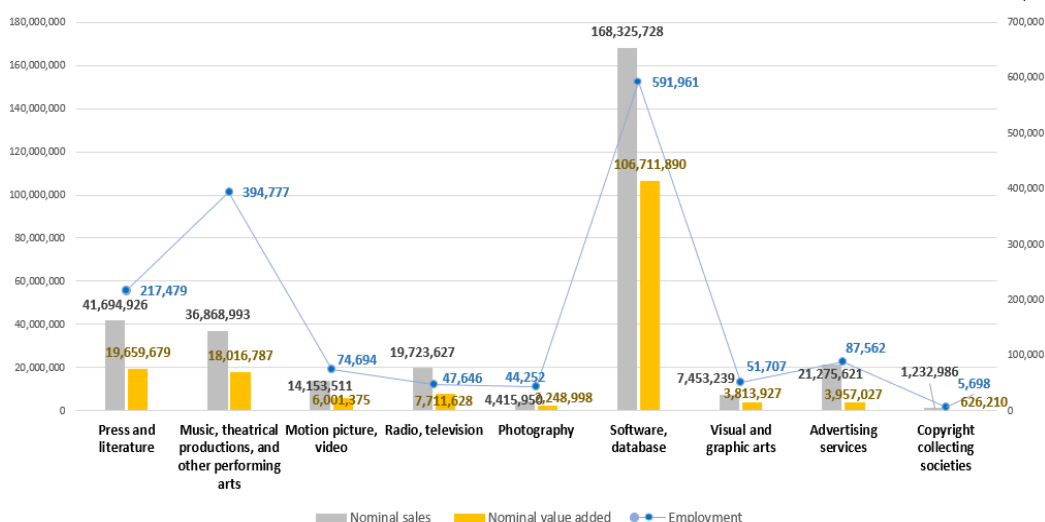
2) Figures in parentheses are shares of Korea's total economy (GDP or total employment).

3.2.2 Core copyright industries by sector

As shown in Figure 3-4, the “software and database” sector recorded the largest economic scale among core copyright industries in 2023 in terms of sales, value added, and employment. Sales reached KRW 168 trillion, value added totaled KRW 107 trillion, and employment amounted to 591,961 people.

[Figure 3-4] Economic Size in Core Copyright Industries by Sector, 2023

(Unit: KRW 1 million, number of people)



In nominal terms, the "press and literature" sector recorded the second-largest sales, at KRW 42 trillion. The difference compared to the "software and database" sector was KRW 127 trillion. The "press and literature" sector also ranked second in value added, generating KRW 20 trillion - a KRW 88 trillion gap compared to the "software and database" sector.

In real terms, the sectoral ranking was identical to that observed in nominal terms. The "software and database" sector recorded the largest sales and value added within core copyright industries, with sales reaching KRW 164 trillion and value added totaling KRW 103 trillion. The "press and literature" sector ranked second in both sales and value added. Real sales reached KRW 38 trillion, showing a gap of KRW 126 trillion while real value added for the sector totaled KRW 18 trillion, also ranking second. The difference compared to the "software and database" sector was KRW 86 trillion.

In terms of employment, the "software and database" sector employed the largest number of people at 591,961, followed by the "music, theatrical productions, and other performing arts" sector at 394,777 and the "press and literature" sector at 217,479. The difference in employment between the "software and database" and "music, theatrical productions, and other performing arts" sectors was 197,184 people.

Examining the employment results of the three largest sectors within core copyright industries, namely the "software and database," "music, theatrical productions, and other performing arts," and "press and literature" sectors, together with their sales and value added, the "software and database" sector accounted for 39.1% of total employment. Its share of sales was 53.4% in nominal terms and 54.8% in real terms, while its share of value added was 63.2% in nominal terms and 64.6% in real terms.

The "press and literature" sector employed 217,479 people, accounting for 14.3% of total employment within core copyright industries. Compared with its shares of sales (13.2% in nominal terms and 12.6% in real terms) and value added (11.6% in nominal terms and 11.1% in real terms), its employment share was at a broadly similar level. In contrast, the "music, theatrical productions, and other performing arts" sector accounted for 26.0% of total employment, a higher share than its shares of sales (11.7% in nominal terms and 11.4% in real terms) and value added (10.7% in nominal terms and 10.4% in real terms). This suggests that,

among the sectors within core copyright industries, the "music, theatrical productions, and other performing arts" sector has a relatively higher share of employment compared with its shares of sales and value added, whereas the "software and database" sector has a lower share of employment than that of sales or value added. This indicates that the "software and database" sector generates more value added per unit of labor input than the "music, theatrical productions, and other performing arts" sector.

[Table 3-6] Economic Size of Core Copyright Industries by Sector, 2023

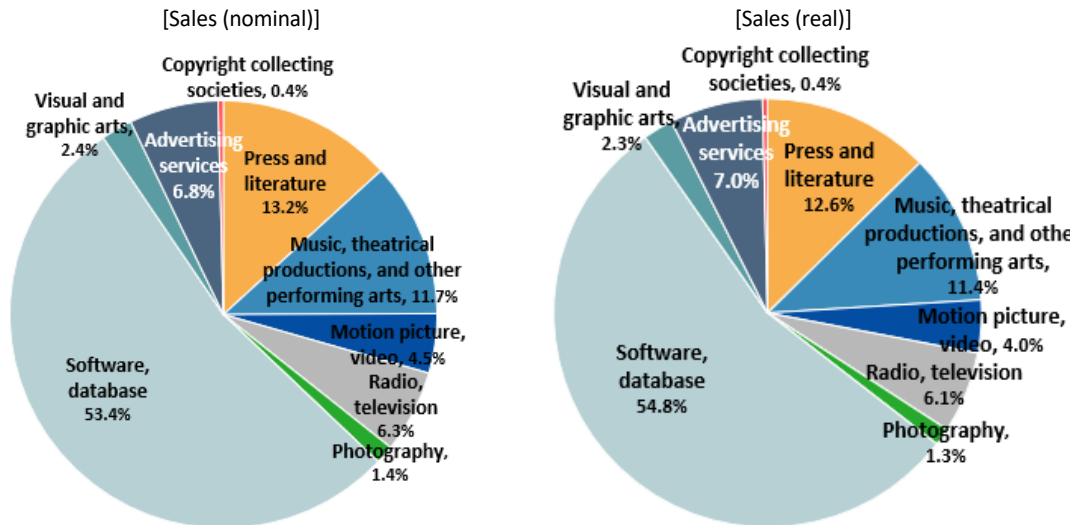
(Unit: KRW 1 million, number of people)

Category	Sales		Value added		Employment
	Nominal	Real	Nominal	Real	
Press and literature	41,694,926	37,750,538	19,659,679	17,783,458	217,479
Music, theatrical productions, and other performing arts	36,868,993	34,136,652	18,016,787	16,681,905	394,777
Motion picture, video	14,153,511	11,916,521	6,001,375	5,112,115	74,694
Radio, television	19,723,627	18,400,459	7,711,628	7,181,178	47,646
Photography	4,415,950	3,940,327	2,248,998	2,002,131	44,252
Software, database	168,325,728	164,050,742	106,711,890	103,479,487	591,961
Visual and graphic arts	7,453,239	6,824,593	3,813,927	3,493,268	51,707
Advertising services	21,275,621	21,068,857	3,957,027	3,908,657	87,562
Copyright collecting societies	1,232,986	1,128,292	626,210	572,491	5,698
Core copyright industries	315,144,581	299,216,981	168,747,521	160,214,690	1,515,776

Thus, in both nominal and real terms, the "software and database" sector accounted for more than half of total sales in core copyright industries, followed by the "press and literature" sector and the "music, theatrical productions, and other performing arts" sector. This suggests that the relative positions of the sectors remained largely unchanged even after adjusting for price changes.

When nominal value added is compared with the sales composition, the "software and database" sector accounts for a larger share of value added. The sector represented 63.2% of nominal value added in core copyright industries, which was 9.8 percentage points higher than its share of sales (53.4%). This indicates that the share of nominal value added generated by the "software and database" sector was relatively higher than its share of sales within core copyright industries.

[Figure 3-5] Share of Sales in Core Copyright Industries by Sector, 2023

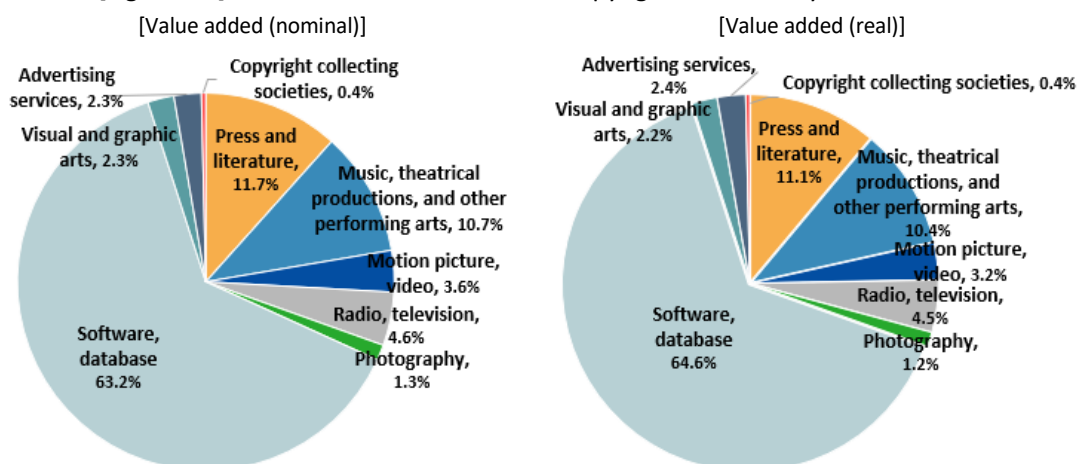


A similar pattern is observed in real terms. The "software and database" sector accounted for 64.6% of real value added in core copyright industries, which was 9.8 percentage points higher than its share of real sales (54.8%). In both nominal and real terms, the share of value added generated by the "software and database" sector exceeded its share of sales. This indicates that the sector continued to account for the largest share of value added creation within core copyright industries even after adjusting for price changes.

Overall, within core copyright industries, the "software and database" sector accounted for the largest proportion of both sales and value added in nominal and real terms. In addition, its share of value added exceeded its share of sales, distinguishing it from the other sectors (Figure 3-6).

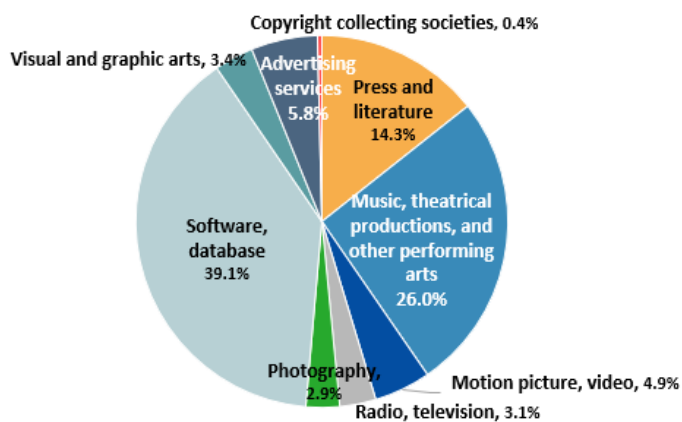
Next, the "press and literature" sector accounted for 11.7% of nominal value added, while the "music, theatrical productions, and other performing arts" sector accounted for 10.7%. Together, the top three sectors accounted for 85.6% of total nominal value added. In contrast, the "radio and television" sector accounted for 4.6%, while the remaining sectors, namely "motion picture and video" (3.6%), "advertising services" (2.3%), "visual and graphic arts" (2.3%), "photography" (1.3%), and "copyright collecting societies" (0.4%), accounted for relatively small shares.

[Figure 3-6] Share of Value Added in Core Copyright Industries by Sector, 2023



Looking at the employment shares of the sectors within core copyright industries in 2023, the "software and database" sector accounted for the largest share at 39.1%, followed by the "music, theatrical productions, and other performing arts" sector at 26.0% and the "press and literature" sector at 14.3%. Notably, the "music, theatrical productions, and other performing arts" sector accounted for 26.0% of total employment, compared with 11.7% of sales and 10.7% of nominal value added. This indicates that its employment share differed from its shares of sales and nominal value added. As a result, the top three sectors, namely the "software and database," "music, theatrical productions, and other performing arts," and "press and literature" sectors, accounted for 79.4% of total employment in core copyright industries.

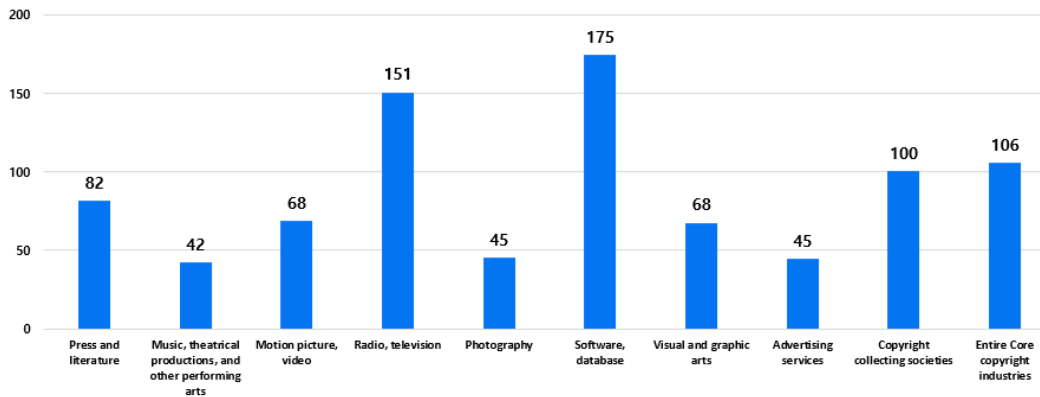
[Figure 3-7] Share of Employment in Core Copyright Industries by Sector, 2023



Labor productivity was calculated as real value added per employee (real value added ÷ employment), and the results are presented in Figure 3-8. In 2023, the labor productivity of core copyright industries was KRW 106 million, an increase of KRW 9 million (9.0%) from the previous year (KRW 97 million). By sector, the “software and database” sector showed the highest labor productivity at KRW 175 million, followed by “radio and television” at KRW 151 million. In contrast, the “music, theatrical productions, and other performing arts” sector recorded KRW 42 million, while the “advertising services” sector recorded KRW 45 million, representing comparatively lower levels of labor productivity.

[Figure 3-8] Labor Productivity of Core Copyright Industries, 2023

(Unit : KRW 1 million)



3.2.3 Core copyright industries by industry

(1) Press and literature

In 2023, the “press and literature” sector recorded nominal sales of KRW 42 trillion, nominal value added of KRW 20 trillion, and employment of 217,479 people (Table 3-7).

In terms of nominal sales, “publishing and printed materials distribution” accounted for the largest share at KRW 18 trillion (43.4%), followed by “printing and printing-related services for books, magazines, newspapers, and advertisements” at KRW 11 trillion (25.5%) and “Book publishing” at KRW 6 trillion (13.3%).

In terms of nominal value added, “publishing and printed materials distribution” accounted

for the largest share at KRW 10 trillion (48.7%), followed by "printing and printing-related services for books, magazines, newspapers, and advertisements" at KRW 5 trillion (26.8%) and "book publishing" at KRW 2 trillion (9.6%).

In terms of employment, "publishing and printed materials distribution" accounted for 65,748 people (30.2%), followed by "printing and printing-related services for books, magazines, newspapers, and advertisements" with 64,353 people (29.6%) and "book publishing" with 35,389 people (16.3%).

[Table 3-7] Economic Size of Press and Literature Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Authors and translators (including one-person business activities)	654,908	594,007	333,260	302,006	7,807
Newspaper publishing	3,081,563	2,762,092	1,052,180	943,098	17,732
News provision services	462,855	391,019	232,207	196,168	3,324
Magazine and periodical publishing	1,414,909	1,268,223	483,112	433,027	10,886
Book publishing	5,553,174	5,171,264	1,896,095	1,765,695	35,389
Publishing of cards, maps, and other printed materials	225,277	200,513	76,919	68,464	1,217
Printing and printing-related services for books, magazines, newspapers, and advertisements	10,637,468	9,535,377	5,272,832	4,733,157	64,353
Publishing and printed materials distribution	18,079,413	16,339,104	9,575,178	8,648,825	65,748
Library services	1,585,359	1,488,939	737,897	693,019	11,024
Total	41,694,926	37,750,538	19,659,679	17,783,458	217,479

(2) Music, theatrical productions, and other performing arts

In 2023, the "music, theatrical productions, and other performing arts" sector recorded sales of KRW 37 trillion, value added of KRW 18 trillion, and employment of 394,777 people (Table 3-8). By specific industry, "performance creation and entertainment-related services" accounted for the largest share, with sales of KRW 26 trillion (69.3%), value added of KRW 13 trillion (70.1%), and employment of 272,856 people (69.1%).

This was followed by "live performance artists, art organizations, and facility operations" and "recorded music distribution services." "Live performance artists, art organizations, and facility

operations" recorded sales of KRW 5 trillion (14.6%), value added of KRW 3 trillion (14.0%), and employment of 105,904 people (26.8%), while "recorded music distribution services" posted sales of KRW 4 trillion (11.3%), value added of KRW 2 trillion (11.4%), and employment of 10,495 people (2.7%). The difference between the two industries was KRW 1 trillion in sales and KRW 0.5 trillion in value added. In employment, "live performance artists, art organizations, and facility operations" accounted for 26.8%, compared with 2.7% for "recorded music distribution services."

Meanwhile, "music and audio materials publishing" recorded sales of KRW 2 trillion (4.7%), value added of KRW 1 trillion (4.0%), and employment of 5,215 people (1.3%), while "copying of sound recordings and performance videos" recorded sales of KRW 0.1 trillion (0.2%), value added of KRW 0.03 trillion (0.2%), and employment of 308 people (0.1%). Overall, the "music, theatrical productions, and other performing arts" sector was centered on "performance creation and entertainment-related services." While the second and third ranked industries showed similar shares of sales and value added, their employment shares differed (Table 3-8).

[Table 3-8] Economic Size of Music, Theatrical Productions and Other Performing Arts Sector by Industry, 2023
(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Live performance artists, art organizations, and facility operations	5,391,164	5,052,847	2,517,575	2,359,406	105,904
Music and audio materials publishing	1,728,981	1,600,606	726,750	672,790	5,215
Copying of sound recordings and performance videos	60,982	54,279	28,742	25,583	308
Recorded music distribution services	4,149,742	3,843,079	2,049,617	1,897,282	10,495
Live performance creation and entertainment-related services	25,538,125	23,585,841	12,694,102	11,726,844	272,856
Total	36,868,993	34,136,652	18,016,787	16,681,905	394,777

(3) Motion picture, video

In 2023, the "motion picture and video" sector recorded sales of KRW 14 trillion, value added of KRW 6 trillion, and employment of 74,694 people (Table 3-9).

By specific industry, "production and distribution of motion pictures and videos" accounted for the largest share within the "motion picture and video" sector, recording sales of KRW 8 trillion, value added of KRW 3 trillion, and employment of 50,638 people (sales 53.6%, value

added 53.1%, employment 67.8%).

"Video rental and distribution services" recorded sales of KRW 4 trillion, value added of KRW 2 trillion, and employment of 10,495 people, accounting for 29.3% of sales and 34.2% of value added. "Motion picture facility operations" recorded sales of KRW 2 trillion, value added of KRW 1 trillion, and employment of 11,212 people (sales 14.2%, value added 9.8%, employment 15.0%). Meanwhile, "motion picture and video artists (individuals and organizations)" and "recording media services for motion pictures and videos" accounted for relatively smaller shares.

[Table 3-9] Economic Size of Motion Picture and Video Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Category	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Motion picture and video artists (individuals and organizations)	346,378	325,311	147,298	138,340	2,042
Production and distribution of motion pictures and videos	7,586,322	5,923,535	3,188,793	2,489,866	50,638
Motion picture facility operations	2,010,088	1,544,971	586,924	451,115	11,212
Video rental and distribution services	4,149,742	4,064,205	2,049,617	2,005,222	10,495
Recording media services for motion pictures and videos	60,982	58,499	28,742	27,572	308
Total	14,153,511	11,916,521	6,001,375	5,112,115	74,694

(4) Radio, television

In 2023, the "radio and television" sector recorded sales of KRW 20 trillion, value added of KRW 8 trillion, and employment of 47,646 people. By detailed industry, "radio and television broadcasting" accounted for the largest share within the sector, recording sales of KRW 7 trillion, value added of KRW 3 trillion, and employment of 21,689 people (sales 37.8%, value added 41.0%, employment 45.5%).

This was followed by "production and distribution of television broadcasting programs," which recorded sales of KRW 4 trillion, value added of KRW 2 trillion, and employment of 10,941 people, and "independent production company operations," which recorded sales of KRW 3 trillion, value added of KRW 1 trillion, and employment of 6,929 people. "Cable broadcasting

services" recorded sales of KRW 3 trillion, value added of KRW 1 trillion, and employment of 6,433 people, while "satellite broadcasting services" recorded sales of KRW 1 trillion, value added of KRW 0.3 trillion, and employment of 1,654 people.

[Table 3-10] Economic Size of Radio and Television Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Production and distribution of television broadcasting programs	4,361,047	3,438,822	1,833,099	1,445,456	10,941
Radio and television broadcasting	7,461,246	7,567,281	3,161,951	3,227,543	21,689
Independent production company operations	3,436,346	2,964,081	1,444,415	1,245,906	6,929
Cable broadcasting services	3,368,794	3,342,603	959,836	952,374	6,433
Satellite broadcasting services	1,096,194	1,087,672	312,327	309,899	1,654
Total	19,723,627	18,400,459	7,711,628	7,181,178	47,646

Note: Independent production company operations were excluded from aggregation due to overlapping KSIC classification codes with Production of television broadcasting programs (duplicate value adjustment).

(5) Photography

In 2023, the photography sector recorded sales of KRW 4 trillion, value added of KRW 2 trillion, and employment of 44,252 people. The sector is divided into two specific industries: "studio operations and photography services" and "photography-related services."

In 2023, "photography-related services" recorded sales of KRW 2 trillion (53.4%) and value added of KRW 1 trillion (52.7%), while "studio operations and photography services" recorded sales of KRW 2 trillion (46.6%) and value added of KRW 1 trillion (47.3%).

In terms of employment, "studio operations and photography services" accounted for 27,376 people (61.9%), while "photography-related services" accounted for 16,876 people (38.1%), indicating a distribution that differs from the composition of sales and value added.

[Table 3-11] Economic Size of Photography Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Studio operations and photography services	2,056,339	1,762,246	1,063,917	911,085	27,376
Photography-related services	2,359,611	2,178,081	1,185,081	1,091,047	16,876
Total	4,415,950	3,940,327	2,248,998	2,002,131	44,252

(6) Software and database

In 2023, the "software and database" sector recorded sales of KRW 168 trillion, value added of KRW 107 trillion, and employment of 591,961 people.

The "software and database" sector is divided into "programming development and supply services," "packaged software distribution," and "online information services." Among the specific industries, "programming development and supply services" showed sales of KRW 134 trillion, value added of KRW 89 trillion, and employment of 525,385 people, accounting for 79.4% of sales, 83.1% of value added, and 88.8% of employment in the entire sector.

"Packaged software distribution" recorded sales of KRW 19 trillion (11.1%), value added of KRW 10 trillion (9.3%), and employment of 25,972 people (4.4%). "Online information services" recorded sales of KRW 16 trillion (9.5%), value added of KRW 8 trillion (7.5%), and employment of 40,604 people (6.9%). Meanwhile, "packaged software distribution" recorded real sales of KRW 23 trillion and real value added of KRW 12 trillion, both higher than the corresponding nominal values. This indicates a relatively large difference between nominal and real values compared with the other industries.

[Table 3-12] Economic Size of Software and Database Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Programming development and supply services	133,670,984	126,031,851	88,743,393	83,675,645	525,385
Packaged software distribution	18,599,059	22,860,244	9,962,938	12,245,522	25,972
Online information services	16,055,685	15,158,647	8,005,559	7,558,319	40,604
Total	168,325,728	164,050,742	106,711,890	103,479,487	591,961

(7) Visual and graphic arts

In 2023, the "visual and graphic arts" sector recorded sales of KRW 7 trillion, value added of KRW 4 trillion, and employment of 51,707 people. Within the sector, "professional design services" accounted for the largest share, recording sales of KRW 5 trillion, value added of KRW 3

trillion, and employment of 36,386 people. It accounted for 69.9% of sales, 71.3% of value added, and 70.4% of employment.

"Art distribution and related services" recorded sales of KRW 2 trillion, value added of KRW 1 trillion, and employment of 14,227 people, while "visual artists and related artists" recorded sales of KRW 0.1 trillion, value added of KRW 0.04 trillion, and employment of 1,095 people. In particular, "professional design services" and "art distribution and related services" together accounted for 98.8% of sales, 99.0% of value added, and 97.9% of employment. This indicates that most of the economic activity within the sector was concentrated in these two industries.

[Table 3-13] Economic Size of Visual and Graphic Arts Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Visual artists and related artists	85,169	79,989	36,219	34,016	1,095
Art distribution and related services	2,153,619	2,037,412	1,059,079	1,005,089	14,227
Professional design services	5,214,451	4,707,192	2,718,630	2,454,163	36,386
Total	7,453,239	6,824,593	3,813,927	3,493,268	51,707

(8) Advertising services

In 2023, the "advertising services" sector comprised a single industry and recorded sales of KRW 21 trillion, value added of KRW 4 trillion, and employment of 87,562 people. Real value added amounted to KRW 4 trillion. Labor productivity, calculated as real value added divided by number of people employed, was approximately KRW 45 million per employee.

[Table 3-14] Economic Size of Advertising Services Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Industry	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Advertising services	21,275,621	21,068,857	3,957,027	3,908,657	87,562
Total	21,275,621	21,068,857	3,957,027	3,908,657	87,562

(9) Copyright collecting societies

In 2023, the "copyright collecting societies" sector consisted of copyright collective management organization activities, copyright-related brokerage services, and activities involving gaining ownership of intangible assets and receiving royalties in exchange for granting third parties the right to use intellectual property (see the Ministry of Data and Statistics Statistical Classification Portal). In 2023, the sector recorded sales of KRW 1 trillion, value added of KRW 1 trillion, and employment of 5,698 people. Real value added amounted to KRW 0.6 trillion. Labor productivity, calculated as real value added divided by employment, was KRW 100 million per employee.

[Table 3-15] Economic Size of Copyright Collecting Societies Sector by Industry, 2023

(Unit: KRW 1 million, number of people)

Category	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Copyright collecting societies	1,232,986	1,128,292	626,210	572,491	5,698
Total	1,232,986	1,128,292	626,210	572,491	5,698

Note: The number of employees for copyright collecting societies within core copyright industries is based on the staff count of 11 domestic collective management organizations as of 2023.

3.3 Interdependent Copyright Industries

3.3.1 Interdependent copyright industries

Interdependent copyright industries are defined as "industries engaged in the production, manufacturing, and sale of devices whose function is entirely or primarily to enable the creation, production, and use of works." Like core copyright industries examined earlier, interdependent copyright industries are also applied with a copyright factor of 100%. Interdependent copyright industries in KSCIC are composed of the following seven specific industries.

KSCIC	Classification of interdependent copyright industries
20001	Telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products)
20002	Computers and equipment manufacturing and distribution
20003	Audio equipment and musical instruments manufacturing and distribution
20004	Photographic and cinematographic instruments manufacturing and distribution
20005	Photocopier manufacturing and distribution
20006	Blank recording material manufacturing and distribution
20007	Paper manufacturing

In 2023, interdependent copyright industries recorded nominal sales of KRW 151 trillion and nominal value added of KRW 62 trillion. Based on this nominal value added, their contribution to GDP was 2.6%.

[Table 3-16] Economic Size and Contribution Trends of Interdependent Copyright Industries (2019–2023)

(Unit: KRW 1 million, number of people)

Category		2019	2020	2021	2022	2023
Sales	Nominal	119,605,005	136,642,064	112,285,250	111,957,366	151,350,022
	Real	128,842,157	149,795,334	121,132,556	119,867,298	164,491,339
Value added	Nominal	47,253,057 (2.5%)	54,067,780 (2.8%)	44,291,972 (2.1%)	42,457,004 (1.8%)	62,468,360 (2.6%)
	Real	50,892,108 (2.7%)	59,201,463 (3.2%)	47,927,234 (2.5%)	45,304,673 (2.0%)	66,883,259 (3.0%)
Employment		406,314 (1.5%)	470,248 (1.7%)	375,929 (1.4%)	361,355 (1.3%)	329,162 (1.2%)

Note: 1) Real Sales & Real Value Added: Base Year 2020 = 100 (PPI, Index of Services)

2) The figures in parentheses indicate the proportion relative to total economy (GDP or total employment), in percentage terms

Looking at the trend over the past five years (2019–2023), real sales increased from KRW 129 trillion in 2019 to KRW 164 trillion in 2023, representing an average annual growth rate of approximately 6.3%. However, after reaching KRW 150 trillion in 2020, a short decline was observed in 2021–2022, followed by a significant rebound in 2023. Sales in real terms in 2023 increased by 37.2% from the previous year.

Real value added also increased from KRW 51 trillion in 2019 to KRW 67 trillion in 2023, representing an average annual growth rate of approximately 7.1%. After declining in 2021 and 2022, it expanded in 2023. Real value added in 2023 increased by 47.6% compared with the previous year.

Employment declined from 406,314 people in 2019 to 329,162 people in 2023, representing an average annual decline rate of approximately 5.1% over the past five years. In 2023, employment for this domain accounted for 1.2% of total employment, and the number of employees decreased by 8.9% compared with the previous year.

3.3.2 Interdependent copyright industries by sector

In 2023, the largest share of sales in interdependent copyright industries was accounted for by "telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products)," which recorded sales of KRW 83 trillion (55.0%). This was followed by "paper manufacturing" at KRW 31 trillion (20.4%) and "computers and equipment manufacturing and distribution" at KRW 21 trillion (14.0%). In terms of value added, "telecommunications and broadcasting equipment manufacturing and distribution" accounted for the largest share at KRW 33 trillion (53.5%), followed by "computers and equipment manufacturing and distribution" at KRW 11 trillion (17.3%) and "paper manufacturing" at KRW 11 trillion (16.9%). In terms of employment, "telecommunications and broadcasting equipment manufacturing and distribution" accounted for 164,822 people (50.1%), followed by "paper manufacturing" with 81,052 people (24.6%) and "computers and equipment manufacturing and distribution" with 37,231 people (11.3%). Together, these three sectors

accounted for 86.0% of total employment in interdependent copyright industries.

[Table 3-17] Economic Size of Interdependent Copyright Industries by Sector, 2023

(Unit: KRW 1 million, number of people)

Category	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Telecommunications and broadcasting equipment manufacturing and distribution	83,315,584	94,816,073	33,406,524	36,681,173	164,822
Computers and equipment manufacturing and distribution	21,234,432	25,519,456	10,804,009	13,073,353	37,231
Audio equipment and musical instruments manufacturing and distribution	2,709,345	2,518,286	1,314,290	1,221,044	11,734
Photographic and cinematographic instruments manufacturing and distribution	8,728,995	7,989,391	4,227,455	3,838,755	22,327
Photocopier manufacturing and distribution	3,554,742	3,511,199	1,678,159	1,657,603	10,163
Blank recording material manufacturing and distribution	927,517	893,749	460,059	443,051	1,833
Paper manufacturing	30,879,406	29,243,185	10,577,863	9,968,280	81,052
Interdependent copyright industries	151,350,022	164,491,339	62,468,360	66,883,259	329,162

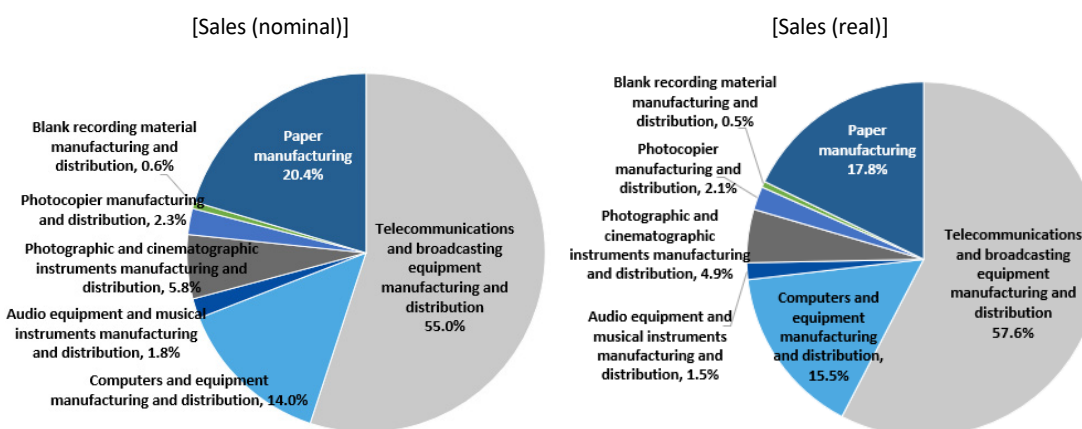
Note: Real Sales & Real Value Added: Base Year 2020 = 100 (PPI, Index of Services)

Meanwhile, in 2023, the direction of nominal and real value indicators showed different patterns across sectors. "Telecommunications and broadcasting equipment manufacturing and distribution" and "computers and equipment manufacturing and distribution" recorded real sales and real value added that exceeded their corresponding nominal values. In contrast, "paper manufacturing" and "photographic and cinematographic instruments manufacturing and distribution" recorded real values that were lower than their corresponding nominal values.

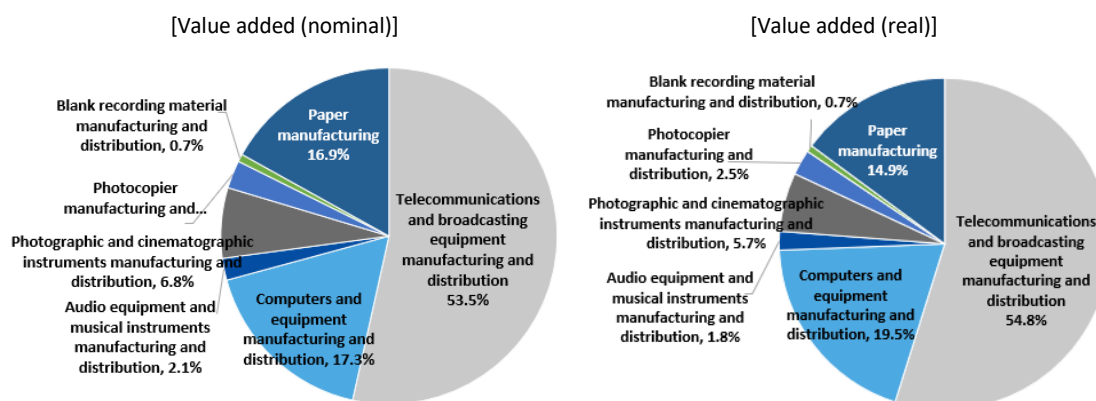
Looking at the nominal sales composition of interdependent copyright industries in 2023, "telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products)" accounted for the largest share at 55.0%, followed by "paper manufacturing" at 20.4% and "computers and equipment manufacturing and distribution" at 14.0%. Together, these three sectors accounted for 89.4% of total sales, indicating that these three leading sectors accounted for the majority of sales of interdependent

copyright industries.

[Figure 3-9] Share of Sales in Interdependent Copyright Industries by Sector, 2023



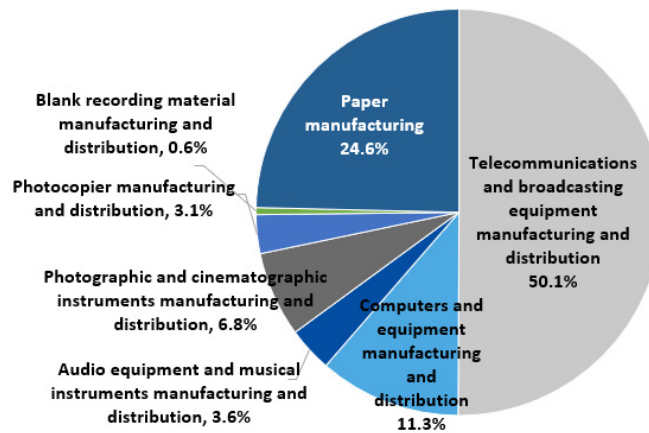
[Figure 3-10] Share of Value Added in Interdependent Copyright Industries by Sector, 2023



The composition of nominal value added of interdependent copyright industries in 2023 is presented in Figure 3-10. "Telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products)" accounted for the largest share at 53.5%, followed by "computers and equipment manufacturing and distribution" at 17.3% and "paper manufacturing" at 16.9%. Together, these three sectors accounted for 87.7% of total value added, indicating a composition similar to that of sales.

The employment composition of interdependent copyright industries in 2023 is presented in Figure 3-11. "Telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products)" accounted for the largest share at 50.1%, followed by "paper manufacturing" at 24.6% and "computers and equipment manufacturing and distribution" at 11.3%. Together, these three sectors accounted for 86.0% of total employment, indicating that employment was also concentrated in the major sectors.

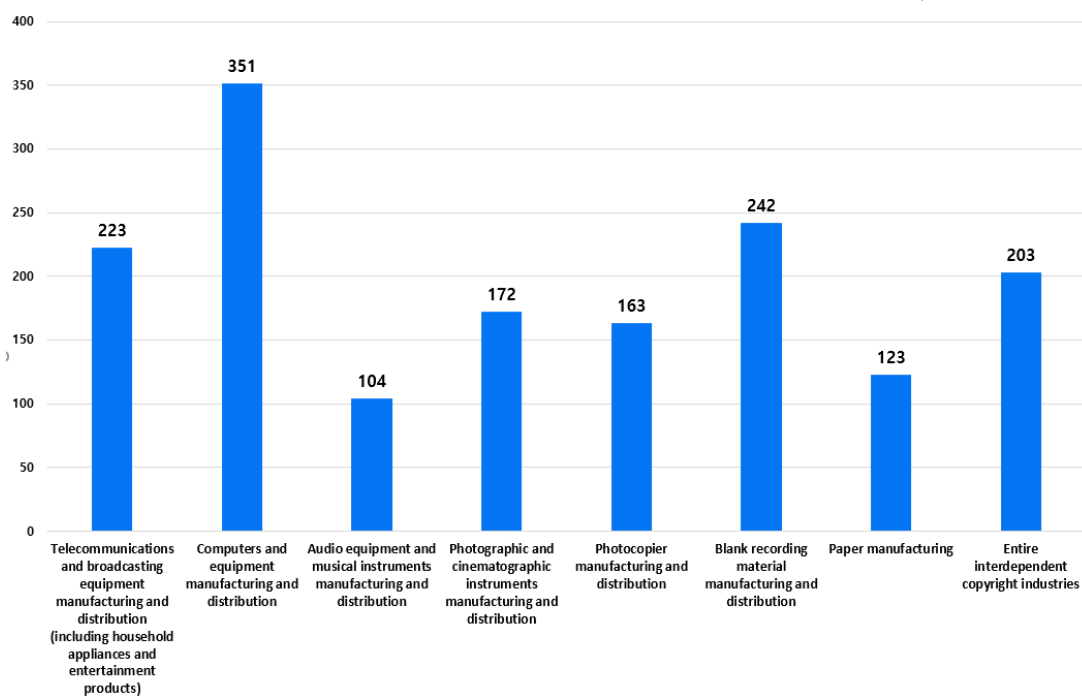
[Figure 3-11] Share of Employment in Interdependent Copyright Industries by Sector, 2023



Labor productivity of interdependent copyright industries averaged KRW 203 million per employee in 2023 (Figure 3-12). By sector, "computers and equipment manufacturing and distribution" recorded the highest labor productivity at KRW 351 million, followed by "blank recording material manufacturing and distribution" at KRW 242 million and "telecommunications and broadcasting equipment manufacturing and distribution (including household appliances and entertainment products)" at KRW 223 million. In addition, labor productivity was KRW 172 million for "photographic and cinematographic instruments manufacturing and distribution," KRW 163 million for "photocopier manufacturing and distribution," KRW 123 million for "paper manufacturing," and KRW 104 million for "audio equipment and musical instruments manufacturing and distribution."

[Figure 3-12] Labor Productivity of Interdependent Copyright Industries, 2023

(Unit: KRW 1 million)



3.4 Partial Copyright Industries

3.4.1 Partial copyright industries

Partial copyright industries are defined as "industries partially involved in the creation, production, manufacturing, performance, broadcasting, transmission and exhibition, and distribution and sale of works." The economic activities of the relevant sectors are considered only partially attributable to copyright and were each applied with an individual copyright factor.²⁷⁾ Under the KSCIC, the detailed classification of partial copyright industries is categorized into the following 10 business types.

KSCIC	Classification of partial copyright industries
30001	Apparel, textile, and footwear manufacturing and distribution
30002	Jewelry and precious metals manufacturing and distribution
30003	Other crafts distribution
30004	Furniture manufacturing and distribution
30005	Household goods, fine china and glass manufacturing and distribution
30006	Wall coverings and carpets manufacturing and distribution
30007	Toys and games manufacturing and distribution
30008	Architectural, engineering, and surveying services
30009	Interior design services
30010	Museums and historical site management and operations

The trends in sales, value added, and employment in partial copyright industries over the past five years (2019–2023) are presented in Table 3-18. Sales increased from KRW 20 trillion in 2019 to KRW 27 trillion in 2022, before declining to KRW 18 trillion in 2023, a decrease of 31.8% compared with the previous year.

²⁷⁾ Apparel, textile, and footwear manufacturing and distribution (6.4%), jewelry and precious metals manufacturing and distribution (5.2%), other crafts distribution (12.0%), furniture manufacturing and distribution (9.0%), household goods, fine china and glass manufacturing and distribution (9.8%), wall coverings and carpets manufacturing and distribution (8.7%), toys and games manufacturing and distribution (11.7%), architectural, engineering, and surveying services (6.9%), interior design services (23.7%), museums and historical site management and operations (16.1%)

However, when recalculated using the same copyright factors applied in previous years, the overall trend remained broadly consistent with that observed in earlier years. The sharp decline in 2023 compared with the previous year is therefore attributable to changes in the calculation method resulting from revisions to copyright factors and the classification system, rather than to a substantial contraction in industry activity. Accordingly, caution should be exercised when making time-series comparisons of sales, value added, and employment in partial copyright industries, as changes in the base year and calculation methodology may affect comparability.

[Table 3-18] Economic Size and Contribution Trends of Partial Copyright Industries(2019–2023)

(Unit: KRW 1 million, number of people)

Category		2019	2020	2021	2022	2023
Sales	Nominal	20,263,137	24,328,464	23,901,316	26,716,430	18,218,619
	Real	19,042,987	22,533,345	21,988,887	24,579,847	16,745,275
Value Added	Nominal	10,794,228 (0.6%)	12,518,144 (0.6%)	12,880,295 (0.6%)	14,961,348 (0.6%)	9,851,872 (0.4%)
	Real	10,042,235 (0.6%)	11,443,749 (0.6%)	11,687,686 (0.6%)	13,544,409 (0.6%)	8,929,086 (0.4%)
Employment		155,980 (0.6%)	173,777 (0.6%)	171,129 (0.6%)	167,097 (0.6%)	108,566 (0.4%)

Note: 1) Real Sales & Real Value Added: Base Year 2020 = 100 (PPI, Index of Services)

2) The figures in parentheses indicate the proportion relative to total economy (GDP or total employment), in percentage.

3.4.2 Partial copyright industries by sector

As shown in Table 3-19, the largest shares within partial copyright industries in 2023 were accounted for by "household goods, fine china and glass manufacturing and distribution," "apparel, textile, and footwear manufacturing and distribution," and "architectural, engineering, and surveying services." In terms of nominal sales, "household goods, fine china and glass manufacturing and distribution" accounted for the largest share at KRW 6 trillion (32.3%), followed by "apparel, textile, and footwear manufacturing and distribution" at KRW 5 trillion (28.3%) and "architectural, engineering, and surveying services" at KRW 3 trillion (16.8%). Together, these three sectors accounted for 77.4% of total sales.

A similar pattern was observed for nominal value added. "Household goods, fine china and

glass manufacturing and distribution" accounted for the largest share at KRW 3 trillion (30.0%), followed by "apparel, textile, and footwear manufacturing and distribution" at KRW 3 trillion (26.5%) and "architectural, engineering, and surveying services" at KRW 2 trillion (22.4%). Together, these three sectors accounted for 79.0% of total value added.

In terms of employment, "household goods, fine china and glass manufacturing and distribution" accounted for 32,399 people (29.8%), followed by "apparel, textile, and footwear manufacturing and distribution" with 30,567 people (28.2%) and "architectural, engineering, and surveying services" with 20,366 people (18.8%). Together, these three sectors accounted for 76.8% of total employment.

Meanwhile, in 2023, "architectural, engineering, and surveying services" showed a larger gap between nominal and real values than the other sectors, indicating that it was more affected by price fluctuations.

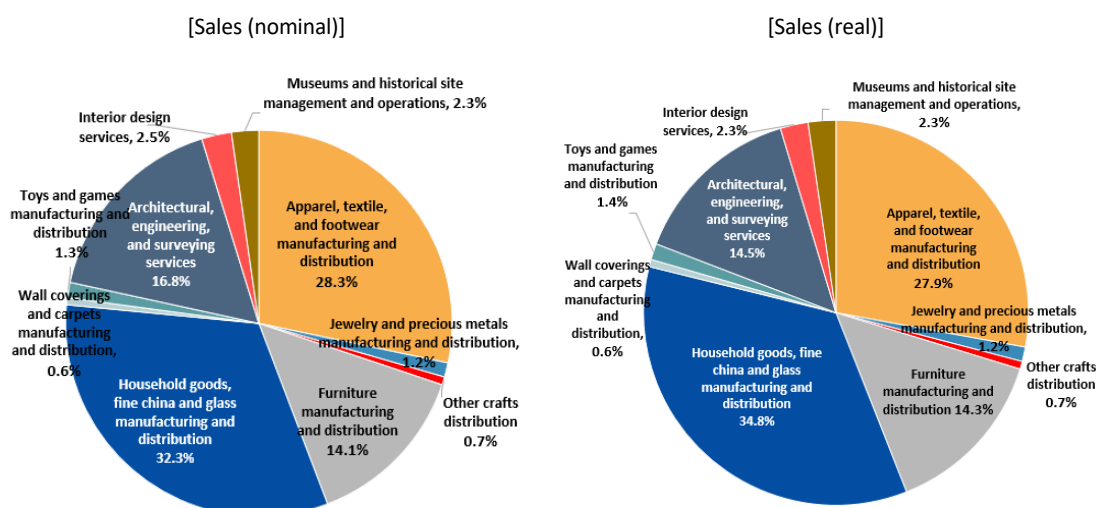
[Table 3-19] Economic Size of Partial Copyright Industries by Sector, 2023

(Unit: KRW 1 million, number of people)

Category	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
Apparel, textile, and footwear manufacturing and distribution	5,152,507	4,665,304	2,611,120	2,353,259	30,567
Jewelry and precious metals manufacturing and distribution	219,029	203,063	102,264	93,698	1,831
Other crafts distribution	121,664	109,918	65,172	58,880	2,035
Furniture manufacturing and distribution	2,562,262	2,393,872	1,240,769	1,158,243	12,396
Household goods, fine china and glass manufacturing and distribution	5,889,242	5,832,447	2,960,229	2,911,468	32,399
Wall coverings and carpets manufacturing and distribution	107,538	102,692	47,618	45,540	1,328
Toys and games manufacturing and distribution	233,249	226,401	123,566	119,993	2,005
Architectural, engineering, and surveying services	3,063,240	2,431,800	2,208,827	1,751,932	20,366
Interior design services	455,583	390,670	279,505	236,215	2,460
Museums and historical site management and operations	414,305	389,107	212,802	199,860	3,180
Partial Copyright Industries	18,218,619	16,745,275	9,851,872	8,929,086	108,566

Note: Real Sales & Real Value Added: Base Year 2020 = 100 (PPI, Index of Services)

[Figure 3-13] Share of Sales in Partial Copyright Industries by Sector, 2023



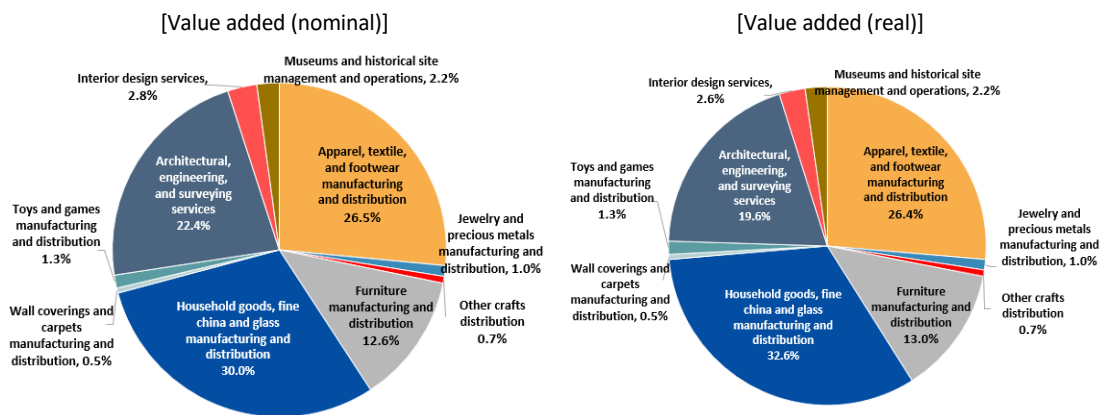
As shown in Figure 3-13, "household goods, fine china and glass manufacturing and distribution" accounted for the largest share of nominal sales in partial copyright industries in 2023 at 32.3%, followed by "apparel, textile, and footwear manufacturing and distribution" at 28.3% and "architectural, engineering, and surveying services" at 16.8%. Together, these three sectors accounted for 77.4% of total sales, indicating that sales of partial copyright industries were concentrated in these three major sectors.

Meanwhile, the lower-ranking sectors accounted for relatively small shares. "Wall coverings and carpets manufacturing and distribution" accounted for 0.6%, "other crafts distribution" for 0.7%, and "jewelry and precious metals manufacturing and distribution" for 1.2%. Together, these three sectors accounted for 2.5% of total sales.

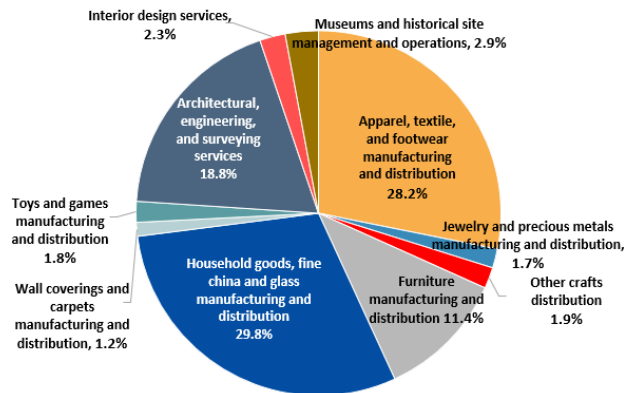
The composition of nominal value added in partial copyright industries in 2023 is presented in Figure 3-14. "Household goods, fine china and glass manufacturing and distribution" accounted for the largest share at 30.0%, followed by "apparel, textile, and footwear manufacturing and distribution" at 26.5% and "architectural, engineering, and surveying services" at 22.4%. Together, these three sectors accounted for 79.0% of total value added, indicating that value added was also concentrated in these major sectors.

In contrast, the lower-ranking sectors accounted for relatively small shares. "Wall coverings and carpets manufacturing and distribution" accounted for 0.5%, "other crafts distribution" for 0.7%, and "jewelry and precious metals manufacturing and distribution" for 1.0%. Together, these three sectors accounted for 2.2% of total value added.

[Figure 3-14] Share of Value Added in Partial Copyright Industries by Sector, 2023



[Figure 3-15] Share of Employment in Partial Copyright Industries by Sector, 2023



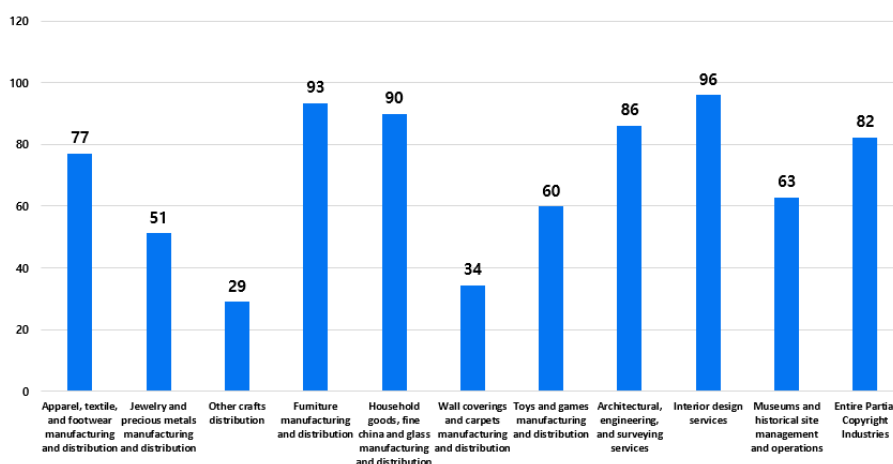
The employment composition of partial copyright industries in 2023 is presented in Figure 3-15. "Household goods, fine china and glass manufacturing and distribution" accounted for the largest share at 29.8%, followed by "apparel, textile, and footwear manufacturing and distribution" at 28.2% and "architectural, engineering, and surveying services" at 18.8%. Together, these three sectors accounted for 76.8% of total employment.

In contrast, sectors with relatively small employment shares included "wall coverings and carpets manufacturing and distribution" at 1.2%, "jewelry and precious metals manufacturing and distribution" at 1.7%, and "toys and games manufacturing and distribution" at 1.8%. Together, these three sectors accounted for 4.7% of total employment.

Finally, labor productivity of partial copyright industries averaged approximately KRW 82 million per employee in 2023 (Figure 3-16). By sector, "interior design services" recorded the highest labor productivity at approximately KRW 96 million, followed by "furniture manufacturing and distribution" at approximately KRW 93 million, "household goods, fine china and glass manufacturing and distribution" at approximately KRW 90 million, and "architectural, engineering, and surveying services" at approximately KRW 86 million. Other sectors included "apparel, textile, and footwear manufacturing and distribution" at approximately KRW 77 million and "museums and historical site management and operations" at approximately KRW 63 million.

[Figure 3-16] Labor Productivity of Partial Copyright Industries by Sector, 2023

(Unit: KRW 1 million)



3.5 Non-dedicated Support Industries

3.5.1 Non-dedicated support industries

According to KSCIC, non-dedicated support industries are defined as "industries in which partial activities contribute to the broadcasting, transmission, sale, and distribution of works and other protected subject matter, and whose activities do not fall under core copyright industries." Among the four categories of copyright industries, non-dedicated support industries have the lowest degree of copyright relevance. They encompass economic activities related to the wholesale and retail distribution of copyrighted works and other protected outputs, as well as transportation and related services.

KSCIC	Classification of non-dedicated support industries
40001	General wholesale and retail trade
40002	General transportation
40003	Communications services

In 2023, non-dedicated support industries recorded nominal sales of KRW 49 trillion and real sales of KRW 43 trillion. Nominal value added amounted to KRW 24 trillion, while real value added was KRW 21 trillion. Accordingly, the contribution of non-dedicated support industries to GDP in 2023 was 2.0% in terms of sales and 1.0% in terms of value added. On a real basis, the corresponding figures were 1.9% and 0.9%, respectively. Employment totaled 342,151 people, accounting for 1.2% of total employment.

[Table 3-20] Economic Size and Contribution Trends of the Non-dedicated Support Industries (2019 – 2023)

(Unit: KRW 1 million, number of people)

Category		2019	2020	2021	2022	2023
Sales	Nominal	27,402,401	37,378,386	34,180,328	38,913,824	48,830,645
	Real	26,832,687	36,540,306	33,859,753	38,564,623	42,553,723
Value Added	Nominal	12,778,181 (0.7%)	14,277,645 (0.7%)	16,512,484 (0.8%)	18,936,980 (0.8%)	24,318,797 (1.0%)
	Real	12,418,511 (0.7%)	13,965,781 (0.8%)	16,313,088 (0.9%)	18,745,575 (0.8%)	21,196,811 (0.9%)
Employment		215,791 (0.8%)	247,847 (0.9%)	256,464 (0.9%)	258,327 (0.9%)	342,151 (1.2%)

Note: 1) Real Sales & Real Value Added: Base Year 2020 = 100 (PPI, Index of Services)

2) The figures in parentheses indicate the proportion relative to overall economy (GDP or total employment), in percentage.

3.5.2 Non-dedicated support industries by sector

In 2023, non-dedicated support industries were composed of three sectors: "general wholesale and retail trade," "general transportation," and "communications services." The economic indicators for each sector are presented in Table 3-21.

In terms of nominal sales, "general transportation" accounted for the largest share at KRW 27 trillion (55.3%), followed by "general wholesale and retail trade" at KRW 18 trillion (37.4%) and "communications services" at KRW 4 trillion (7.3%). Real sales also followed the same pattern, with "general transportation" at KRW 23 trillion, "general wholesale and retail trade" at KRW 16 trillion, and "communications services" at KRW 4 trillion. This indicates that sales were concentrated primarily in "general transportation" and "general wholesale and retail trade."

For nominal value added, "general transportation" accounted for the largest share at KRW 13 trillion (52.3%), followed by "general wholesale and retail trade" at KRW 10 trillion (40.2%) and "communications services" at KRW 2 trillion (7.5%). Real value added showed the same ranking, with "general transportation" at KRW 11 trillion, "general wholesale and retail trade" at KRW 8 trillion, and "communications services" at KRW 2 trillion.

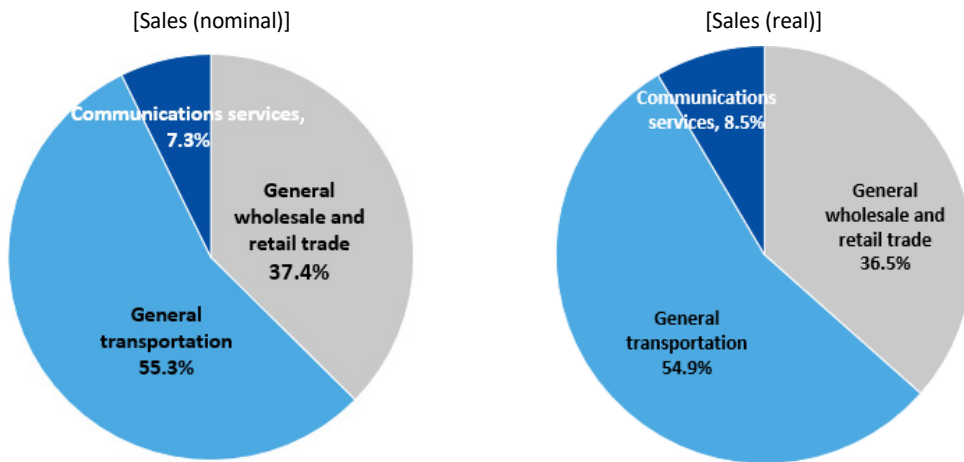
In terms of employment, "general transportation" accounted for the largest share, with 172,622 people (50.5%), followed by "general wholesale and retail trade" with 167,435 people (48.9%). "Communications services" accounted for 2,095 people (0.6%), indicating a substantially smaller employment scale than the other two sectors (Table 3-21).

[Table 3-21] Economic Size of Non-dedicated Support Industries by Sector, 2023

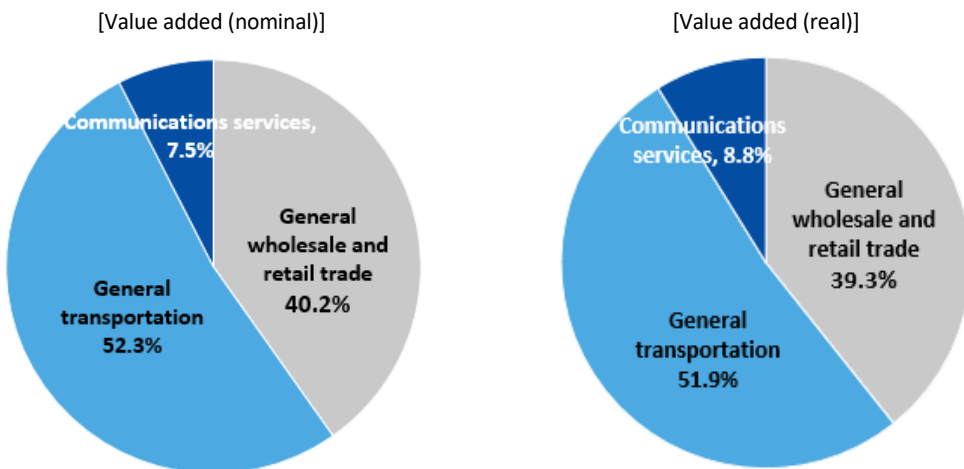
(Unit: KRW 1 million, number of people)

Category	Sales		Value Added		Employment
	Nominal	Real	Nominal	Real	
General wholesale and retail trade	18,261,189	15,546,075	9,781,952	8,327,549	167,435
General transportation	27,027,154	23,377,062	12,709,729	10,996,762	172,622
Communications services	3,542,302	3,630,586	1,827,116	1,872,500	2,095
Non-dedicated support industries	48,830,645	42,553,723	24,318,797	21,196,811	342,151

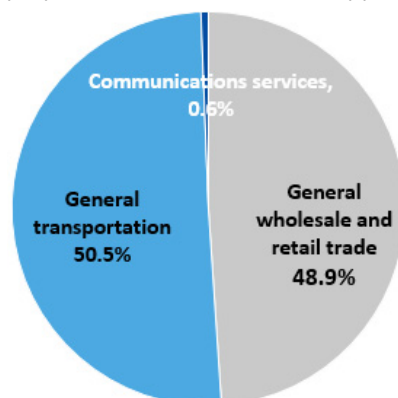
[Figure 3-17] Share of Sales in Non-dedicated Support Industries by Sector, 2023



[Figure 3-18] Share of Value Added in Non-dedicated Support Industries by Sector, 2023



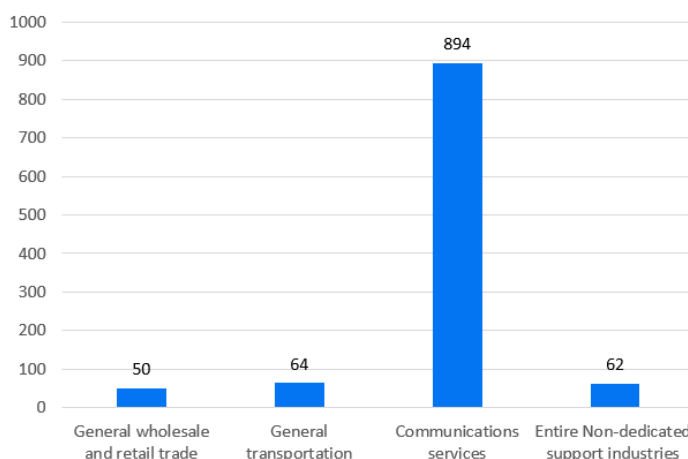
[Figure 3-19] Share of Employment in Non-Dedicated Support Industries by Sector, 2023



Finally, labor productivity in non-dedicated support industries averaged approximately KRW 62 million in 2023 (Figure 3-20). By sector, "communications services" recorded the highest labor productivity at approximately KRW 894 million, followed by "general transportation" at approximately KRW 64 million and "general wholesale and retail trade" at approximately KRW 50 million. The exceptionally high labor productivity in "communications services" reflects its relatively high level of real value added despite its very small employment base.

[Figure 3-20] Labor Productivity of Non-Dedicated Support Industries by Sector, 2023

(Unit: KRW 1 million)





Chapter 4

Trends in the Economic Contribution of Copyright Industries

4.1 Sales

4.2 Value Added

4.3 Employment

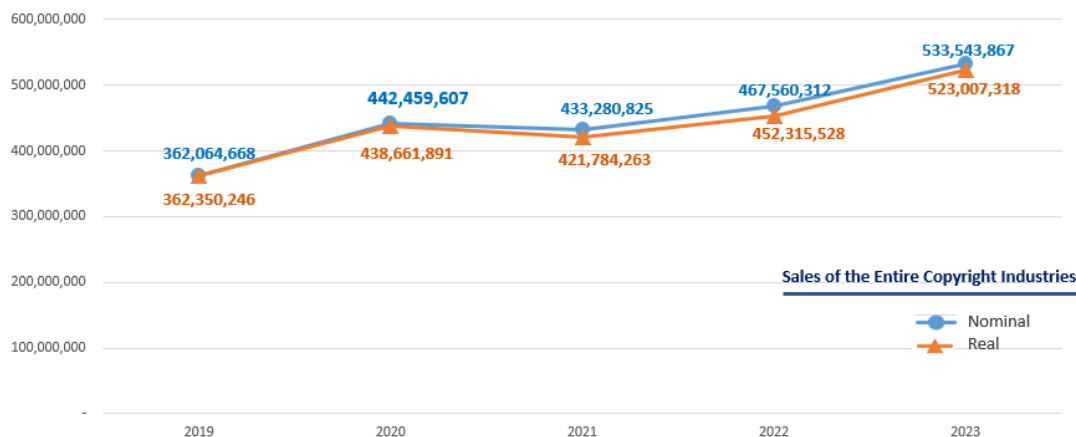
Trends in the Economic Contribution of Copyright Industries

4.1 Sales

Looking at trends in sales of copyright industries over the past five years (2019–2023), both nominal and real sales showed an overall upward trend. The average annual growth rate of nominal sales was approximately 10.0%, while that of real sales was 10.9%, indicating sustained growth in sales over the medium to long term (Figure 4-1).

[Figure 4-1] Sales Trends of Copyright Industries (2019–2023)

(Unit: KRW 1 million)



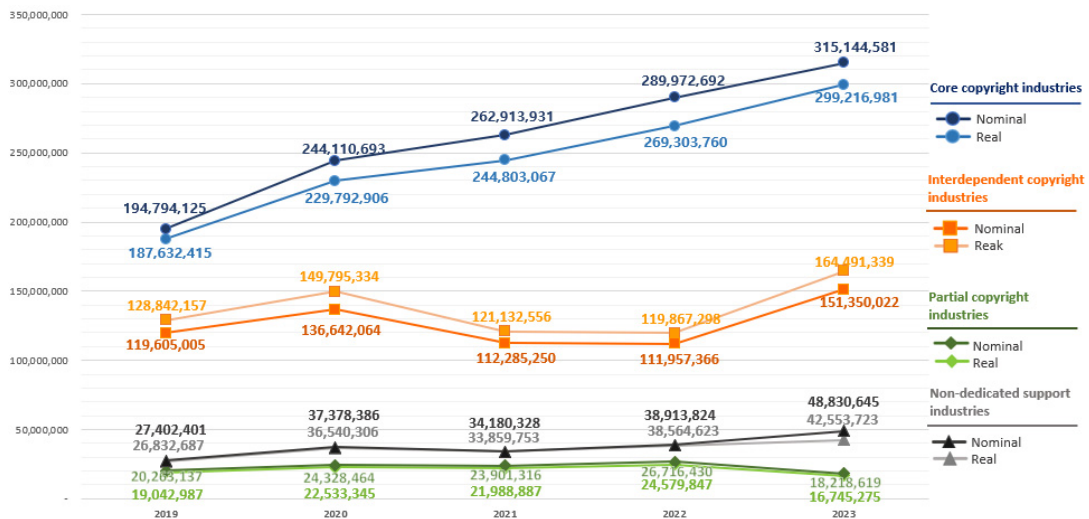
By year, nominal sales reached KRW 442 trillion in 2020, an increase of 22.1% compared with 2019. In 2021, sales declined to KRW 433 trillion, down 2.1% from the previous year, reflecting a temporary adjustment. Sales recovered to KRW 468 trillion in 2022, increasing by 7.9% compared with the previous year, and rose further to KRW 534 trillion in 2023, up 14.1% from the previous year and reaching the highest level of the past five years. Overall, sales maintained an upward trend, except for the temporary decline of 2.1% in 2021.

Real sales reached KRW 439 trillion in 2020, an increase of 21.1% compared with 2019. They declined to KRW 422 trillion in 2021, down 3.8% from the previous year, before recovering to KRW 452 trillion in 2022, an increase of 7.2%. In 2023, real sales rose to KRW 523 trillion, increasing by 21.3% compared with the previous year and recording the highest growth rate of the past five years. Accordingly, the year-on-year growth rates of real sales were 21.1% in 2020, -3.8% in 2021, 7.2% in 2022, and 15.6% in 2023.

Looking at sales trends by sector, differences among sectors became more pronounced in 2023. Nominal sales in core copyright industries increased from KRW 195 trillion in 2019 to KRW 315 trillion in 2023, representing an average annual growth rate of 12.8% over the past five years (2019–2023). Sales also increased by 8.7% in 2023 compared with the previous year, maintaining a stable upward trend overall.

[Figure 4-2] Sales Trends of Copyright Industries by Category (2019–2023)

(Unit: KRW 1 million)



Nominal sales in interdependent copyright industries declined sharply by 19.0% in 2021 compared with the previous year. The rate of decline moderated to 1.0% in 2022, before sales increased to KRW 151 trillion in 2023, up 27.3% from the previous year, indicating a clear recovery. Over the past five years (2019–2023), sales increased at an average annual rate of approximately 4.1%, indicating moderate growth over the medium to long term. Sales in partial

copyright industries increased gradually through 2022 but declined to KRW 18 trillion in 2023, down 30.2% from the previous year. However, this decline primarily reflects the incorporation of the 2025 copyright factor survey, which significantly affected the calculation methodology. When recalculated using the previous copyright factors, sales remain broadly consistent with earlier trends. Therefore, the decline should not be interpreted as a substantial contraction in industry activity compared with the previous year.

Nominal sales in non-dedicated support industries reached KRW 49 trillion in 2023, an increase of 25.9% compared with the previous year. With an average annual growth rate of 17.8% over the past five years, this category recorded the fastest growth among the four copyright industry categories.

Overall, sales trends indicate that core copyright industries continued to drive the expansion of the copyright industries, while interdependent and non-dedicated support industries showed stronger recovery and growth in 2023.

Looking at real sales by sector, differences among sectors became more pronounced in 2023, similar to the pattern observed on a nominal basis. Real sales in core copyright industries increased from KRW 188 trillion in 2019 to KRW 299 trillion in 2023, representing an average annual growth rate of 12.4% over the past five years (2019–2023). Real sales also increased by 11.1% in 2023 compared with the previous year, maintaining a steady upward trend.

Real sales in interdependent copyright industries declined sharply by 19.1% in 2021, and the rate of decline moderated to 1.0% in 2022. In 2023, however, real sales increased to KRW 164 trillion, up 37.2% from the previous year, indicating an accelerated recovery. Real sales in non-dedicated support industries reached KRW 43 trillion in 2023, increasing by 10.3% compared with the previous year and recording the highest growth rate among the four copyright industry categories. In contrast, sales in partial copyright industries continued to increase through 2022 but declined to KRW 17 trillion in 2023, down 31.9% from the previous year. As with nominal sales, this represents a reversal from the previous upward trend.

Comparing nominal and real sales, the overall direction and structural changes across

sectors were broadly similar. In particular, both nominal and real sales growth strengthened in 2023 for core, interdependent, and non-dedicated support industries.

4.2 Value Added

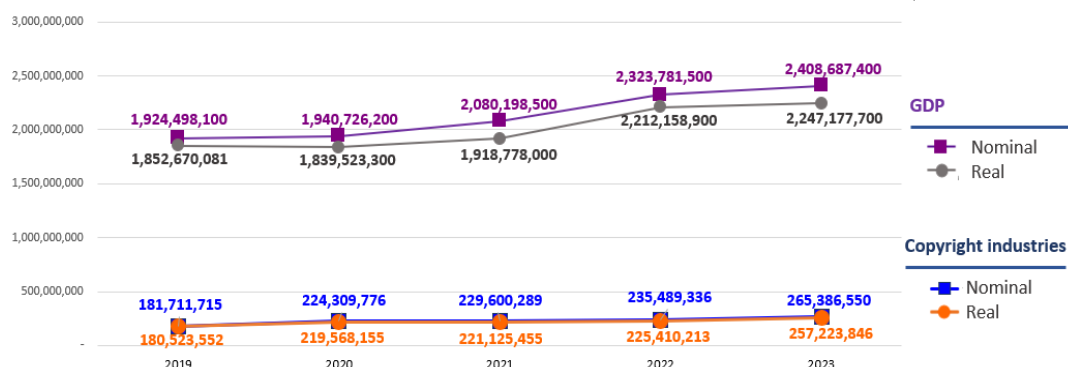
Looking at nominal value added in copyright industries and nominal GDP over the period 2019–2023, nominal GDP increased from KRW 2,041 trillion in 2019 to KRW 2,409 trillion in 2023. Over the same period, nominal value added in copyright industries increased from KRW 182 trillion to KRW 265 trillion, representing an average annual growth rate of approximately 10.0%. During the same period, nominal GDP grew at an average of 4.2%, from KRW 2,041 trillion to KRW 2,409 trillion, indicating that the growth of value added in copyright industries substantially outpaced the growth of the overall economy, even in nominal terms.

Looking at nominal trends by year, nominal GDP increased from KRW 2,041 trillion in 2019 to KRW 2,055 trillion in 2020 and continued to expand each year, reaching KRW 2,222 trillion in 2021, KRW 2,258 trillion in 2022, and KRW 2,409 trillion in 2023. Over the same period, nominal value added in copyright industries increased from KRW 182 trillion in 2019 to KRW 224 trillion in 2020, up 23.4% from the previous year. It increased further to KRW 230 trillion in 2021, representing growth of 2.4%, and to KRW 235 trillion in 2022, up 2.6% from the previous year. In 2023, value added reached KRW 265 trillion, increasing by 12.7% compared with the previous year and indicating a renewed acceleration in growth. Accordingly, after a period of slower growth, value added in copyright industries returned to a clear expansion trend in 2023, even in nominal terms.

In real terms, GDP increased from KRW 1,853 trillion in 2019 to KRW 2,247 trillion in 2023. Year-on-year growth rates were -0.7% in 2020, 4.6% in 2021, 2.7% in 2022, and 1.6% in 2023, indicating a gradual recovery following the economic contraction in 2020.

[Figure 4-3] Value Added Trends of Copyright Industries and Total Economy in Korea (2019–2023)

(Unit: KRW 1 million)



In contrast, real value added in copyright industries increased from KRW 181 trillion in 2019 to KRW 271 trillion in 2023, showing a pattern that differed from that of real GDP in both growth magnitude and fluctuation. While real GDP declined by 0.7% in 2020, real value added in copyright industries increased by 21.6%. Growth subsequently slowed to 0.7% in 2021 and 1.9% in 2022 before accelerating again to 20.3% in 2023.

Accordingly, in 2021 and 2022, the growth rate of copyright industries was lower than that of GDP in real terms. In contrast, the growth rate of copyright industries significantly exceeded that of GDP in 2020 and 2023. Over the past five years (2019–2023), real GDP increased at an average annual rate of 2.0%, while real value added in copyright industries increased by 10.7%.

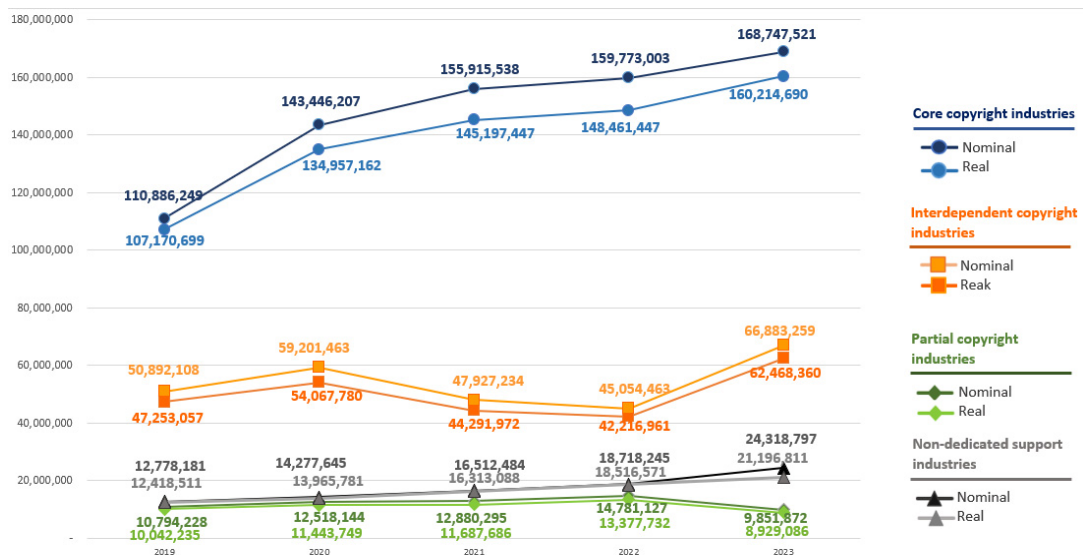
These results indicate that copyright industries outperformed the overall economy in both nominal and real terms.

The following section examines trends in value added across the four copyright industry categories in both nominal and real terms. In nominal terms, differences in value added trends across categories became increasingly pronounced between 2019 and 2023. Nominal value added in core copyright industries increased from KRW 111 trillion in 2019 to KRW 169 trillion in 2023, representing an average annual growth rate of approximately 11.1% over the past five years (2019–2023). Value added in interdependent copyright industries also increased from KRW 51 trillion in 2019 to KRW 62 trillion in 2023, with an average annual growth rate of approximately 5.3%. In contrast, nominal value added in partial copyright industries declined

from KRW 12 trillion in 2019 to KRW 10 trillion in 2023, representing an average annual decline of 5.6%. Value added in non-dedicated support industries increased from KRW 13 trillion in 2019 to KRW 24 trillion in 2023, representing an average annual growth rate of approximately 17.6%, the highest among the four copyright industry categories.

[Figure 4-4] Value Added Trends of Copyright Industries by Category (2019–2023)

(Unit: KRW 1 million)



In real terms, differences in value added trends across categories became even more pronounced. Between 2019 and 2023, real value added in core copyright industries increased from KRW 107 trillion to KRW 160 trillion, while that of interdependent copyright industries increased from KRW 51 trillion to KRW 67 trillion. In contrast, real value added in partial copyright industries declined from KRW 10 trillion in 2019 to KRW 9 trillion in 2023, whereas that of non-dedicated support industries increased substantially from KRW 12 trillion to KRW 21 trillion.

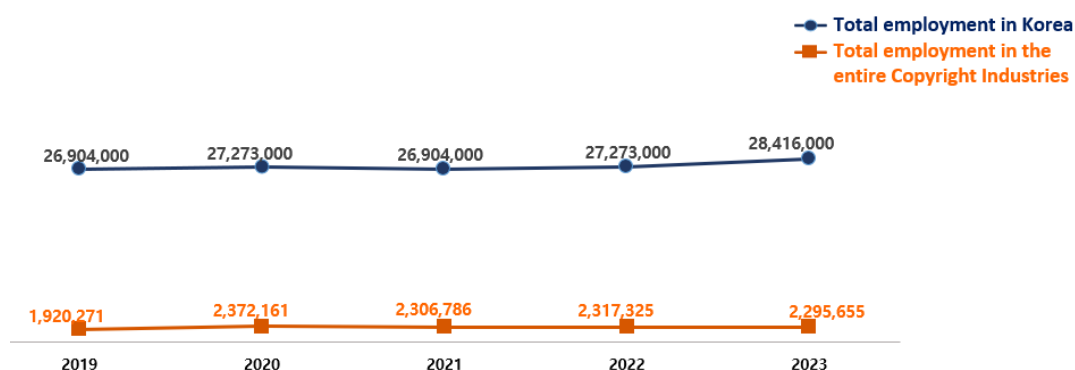
Looking at average annual growth rates over the past five years in real terms, core copyright industries increased by 10.6%, interdependent copyright industries by 7.1%, while partial copyright industries declined by 2.9%. Non-dedicated support industries recorded the highest growth rate, increasing at an average annual rate of 14.3%. In particular, between 2022 and

2023, real value added increased by 7.9% in core copyright industries, 48.4% in interdependent copyright industries, and 89.7% in non-dedicated support industries, while partial copyright industries declined by 33.3%. This indicates that differences in value added trends across categories widened substantially during the period.

4.3 Employment

Employment trends for the overall economy and copyright industries are presented in Figure 4-5. Between 2019 and 2023, total employment in the overall economy increased 26.904 million people to 28.416 million people, while employment in copyright industries increased from 1.920 million to 2.296 million people. Over the same period, the average annual growth rate was 1.4% for the overall economy and 4.6% for copyright industries, indicating a gradual upward trend in both.

[Figure 4-5] Employment Trends of Copyright Industries and Total Employment in Korea (2019–2023)
(Unit: No. of people)



Looking at year-on-year growth rates, employment in the overall economy increased by 1.4% in 2020, declined by 1.4% in 2021, increased by 1.4% in 2022, and rose by 4.2% in 2023. Employment in copyright industries increased by 23.5% in 2020, declined by 2.8% in 2021, increased by 0.5% in 2022, and decreased by 0.9% in 2023.

Looking at the employment trend of each copyright industry category between 2019 and 2023, employment in core copyright industries increased from 1,142,186 people to 1,515,776 people, representing an average annual growth rate of 7.3%. In 2020, the increase rate was 29.6%, followed by growth of 1.6% in 2021 and 1.8% in 2022, before declining by 1.0% in 2023.

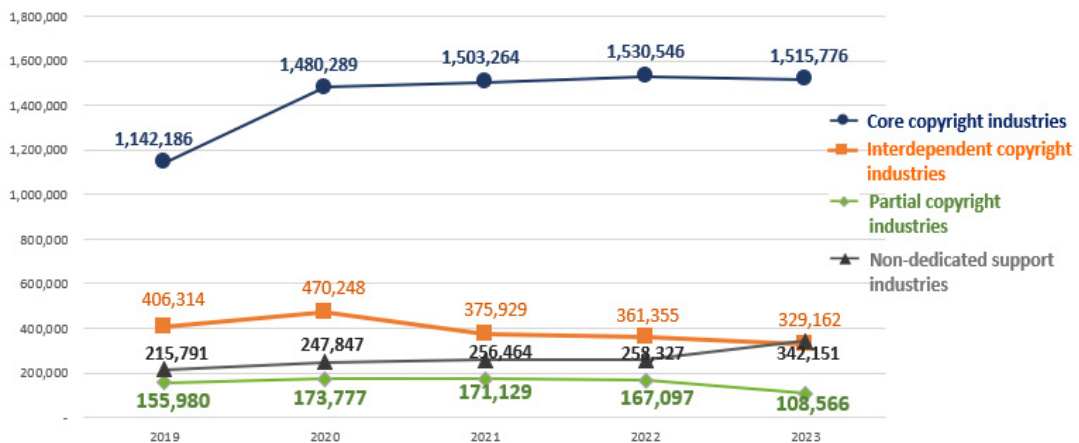
Employment in interdependent copyright industries declined from 406,314 people in 2019 to 329,162 people in 2023, representing an average annual decline of 5.1%. Employment increased by 15.7% in 2020 but declined by 20.1% in 2021. The downward trend continued, with declines of 3.9% in 2022 and 8.9% in 2023.

Employment in partial copyright industries declined from 155,980 people in 2019 to 108,566 people in 2023, representing an average annual decline of 8.7%. Following growth of 11.4% in 2020, employment declined by 1.5% in 2021 and 2.4% in 2022, before falling by 35.0% in 2023.

Employment in non-dedicated support industries increased from 215,791 people in 2019 to 342,151 people in 2023, representing an average annual growth rate of 12.2%. Following growth of 14.9% in 2020, employment increased by 3.5% in 2021 and 0.7% in 2022, before rising sharply by 32.4% in 2023.

[Figure 4-6] Employment Trends of Copyright Industries by Category (2019–2023)

(Unit: No. of people)





Chapter 5

Conclusion and Implications

Conclusion and Implications

Copyright industries are those that create or exploit copyrighted works, including music, films, literature, art, software, and games. They encompass economic activities throughout the entire value chain, from the creation and production of copyright-related goods and services to their distribution and use. Every year, the Korea Copyright Commission estimates the value added of the copyright industries according to WIPO methodology.

Recent developments such as the spread of artificial intelligence (AI), advances in digital technologies, and the expansion of platform-based content distribution have brought significant changes to the production, distribution, and consumption structure of copyright industries. As content creation becomes increasingly technology-driven and distribution channels become more platform-centered, differences in growth patterns and structural changes across industry categories have become more pronounced. Along with the expansion of the copyright market, these developments are reshaping activities across the value chain. In particular, the growing consumption of digital content and the expansion of platform-based distribution models have become key drivers of value creation in copyright industries.

As of 2023, the economic contribution of overall copyright industries was estimated at 11.0% of GDP in nominal terms and 11.4% in real terms, while their share of total employment reached 8.1%. These figures indicate that copyright industries account for a substantial share of Korea's economy and employment and play an important role in job creation. Looking at the different categories, core copyright industries accounted for the largest shares of both sales and value added, at 59.1% and 63.6%, respectively, indicating that value creation is concentrated in this category. Interdependent copyright industries accounted for 28.4% of sales and 23.5% of value added, demonstrating their complementary role within the overall copyright industry structure. In terms of employment, core copyright industries accounted for 66.0% of total

employment in copyright industries, while interdependent copyright industries accounted for 14.3%.

Looking at trends over the past five years (2019–2023), copyright industries maintained an overall upward trend in real sales and real value added. Real value added showed relatively stable growth despite economic fluctuations, while employment continued to increase through 2022 before showing some adjustment in certain sectors in 2023. As noted earlier, this should not be interpreted as an overall contraction of copyright industries. Rather, it reflects structural changes arising from digital transformation and the reorganization of distribution structures, which have affected industry categories differently.

In 2023, real value added in copyright industries increased by 20.3% compared with the previous year. Real value added in core copyright industries also increased by 7.9%, supporting continued growth across the industry. In particular, the "software and database" sector accounted for 64.6% of real value added in core copyright industries in 2023, with real value added reaching KRW 103 trillion. This sector continued to lead the growth of value added within copyright industries.

On the other hand, real value added in the "radio and television" sector, which is based on traditional media content production and distribution, declined from KRW 13 trillion in 2022 to KRW 7 trillion in 2023, a decrease of 46.0% from the previous year. In addition, real value added in "cable broadcasting," a sub-category of the "radio and television" sector, fell sharply from KRW 7 trillion in 2022 to approximately KRW 95.2 billion in 2023, representing a decline of 86.7%. Total employment in copyright industries increased by 338,103 people in 2020 and continued to grow. In 2023, however, it declined by 14,770 people compared with the previous year, representing a decrease of 1.0%.

In summary, the economic contribution of Korea's copyright industries in 2025, based on 2023 data, totaled a little under KRW 534 trillion in nominal sales and some KRW 524 trillion in real sales while nominal value added recorded KRW 265 trillion and real value added KRW 257 trillion, both approximate figures. Employment totaled 2,295,655 people. Within the copyright industries as a whole, core copyright industries accounted for approximately KRW 315 trillion in nominal sales and approximately KRW 299 trillion in real sales, a little under KRW 169 trillion in

nominal value added, around KRW 160 trillion in real value added, and 1,515,776 people in employment. The copyright industries as a whole were equivalent to 11.0% of nominal value added and 11.4% in real terms while core copyright industries accounted for 7.0% in nominal terms and 7.1% in real terms. Employment stood at 8.1% and 5.3% of total employment for the copyright industries as a whole and for core copyright industries, respectively.

Within the latter category, the "software and database" sector accounted for over KRW 103 trillion, representing 64.6% of real value added in core copyright industries and the largest share among all sectors. Core copyright industries also formed the largest employment base among copyright industries while per capita labor productivity also recorded the highest among copyright industries at approximately KRW 175 million per employee. Trends over the past five years suggest that the "software and database" sector was one of the main factors driving the expansion of value added in core copyright industries. The real value added for this sector increased from around KRW 66 trillion in 2019 to over KRW 103 trillion in 2023, accounting for the largest proportion among sectors within core copyright industries. In 2023, real value added in core copyright industries increased by 7.9% compared with the previous year. This growth was supported by the continued strength of "programming development and supply services," which generated a little under KRW 84 trillion in value added, and by the substantial increase in value added from "packaged software distribution," which reached over KRW 12 trillion. Although value added in "database provision services" declined, the "software and database" sector remained the primary driver of growth in real value added within core copyright industries.

Going forward, policy and industry responses should take into account both structural changes across industry categories and evolving employment patterns. Based on the findings of this study, policy measures are needed to strengthen workforce supply and capabilities in high-growth sectors, while supporting job transitions, retraining, and employment stability in sectors undergoing significant adjustment.

The calculation results of this report are incorporated into the annual copyright statistics published by the Korea Copyright Commission and may serve as a valuable resource for assessing industry trends and supporting policy development and industry decision-making.

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