

GLOBAL

2021

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Global Hallyu Trends

Handbook on the analysis of major issues in Hallyu and regional trends throughout 2021

HALLYU

TRENDS

2021 Global Hallyu Trends

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2021 Global Hallyu Trends

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Paradox of the COVID-19 pandemic and Hallyu in 2021

The COVID-19 pandemic has deeply impacted all industries across the world and even changed humanity's way of life. Cultural industries are no exception; the pandemic sparked a paradigm shift in which contactless consumption behavior became commonplace and face-to-face consumption of content rapidly declined. Korean cultural industries also endured a process of chaos and adaptation, though they appear to have landed softer than expected. This is because more Korean cultural content* was exported in 2020 than in 2019, the period before the COVID-19 outbreak, and overseas Hallyu consumers actually consumed more Hallyu content in 2020 than in 2019. Games and video content (entertainment programs, dramas, etc.), which benefited from the popularization of contactless and "stay-at-home" consumption and the spread of the global OTT distribution network, recorded enormous growth that exceeded the music

industry's losses due to the suspension of offline concerts. Therefore, although some sectors flourished while others floundered, this was a year in which the overall Hallyu content industry transformed a crisis into an opportunity, to the extent that it can be called the "COVID-19 paradox."

Global Hallyu Trends, which sees its fifth publication this year, analyzes issues in Hallyu each year and summarizes the current status of Hallyu by country and region. Particularly, based on the *2021 Overseas Hallyu Survey* and *2020 Study on Economic Ripple Effects of Hallyu*, the *2021 Global Hallyu Trends* uses survey results on 8,500 overseas Hallyu consumers (users) in 18 countries and statistics on the export of Hallyu content to analyze the perceptions, consumption status, ripple effects, and state

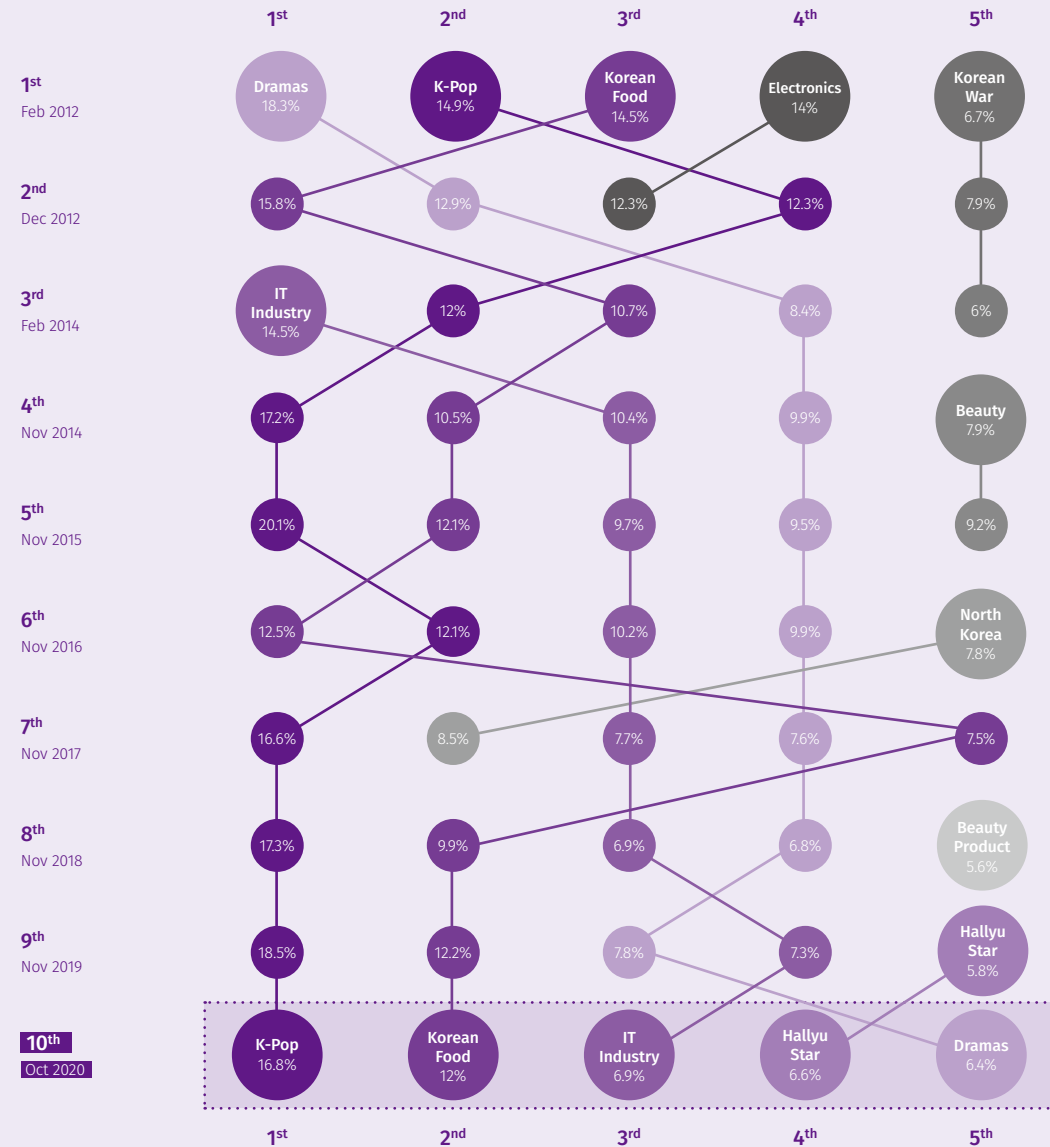
of Hallyu in each country, as well as changes in Hallyu consumption compared to before COVID-19. By comparing each country and content genre, this handbook determines and summarizes major issues of the year related to the perception, consumption, and ripple effects of Hallyu overseas, and presents these findings in an easily comprehensible format.

As the pandemic's impact continues in 2021, Hallyu industries are actively adapting and evolving with the paradigm shift in all aspects, including production, distribution, and consumption. This period will be remembered as an era of transformation in human history. We hope that this handbook serves as a beacon leading Hallyu into the future of global cultural content as it continues to embrace the massive changes across the industry.

* The term 'cultural content' is frequently used in Korean society and cultural contents are an integrated discipline that combines humanities, natural sciences, and the arts. The cultural contents industry is defined as an industry related to the production, distribution and consumption of cultural products and services: film, games, animation, comics(webtoons), music, Internet & mobile contents, broadcasting, etc.

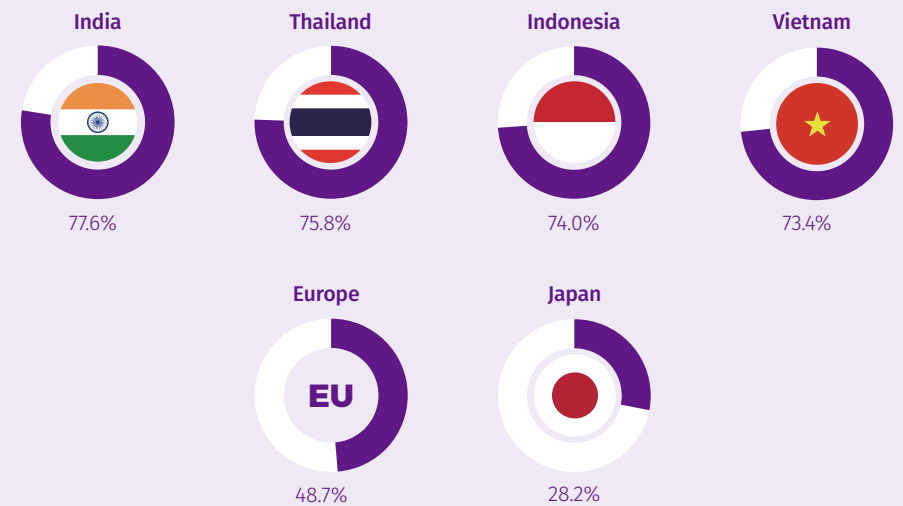
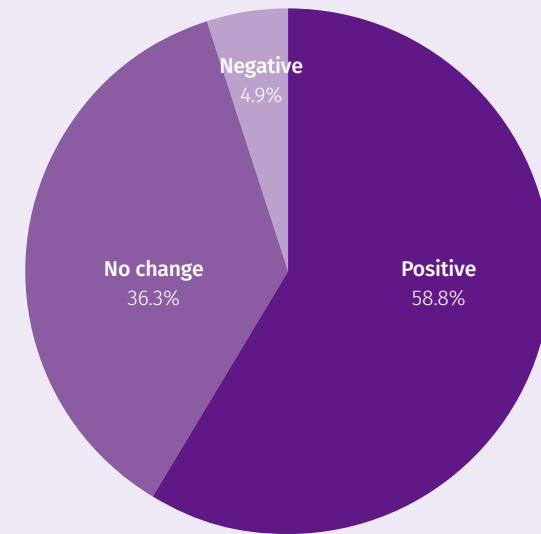
Images associated with Korea

With a response rate of 16.8%, “K-Pop” was the image most commonly associated with Korea for four consecutive years, followed by “Korean food” (12.0%), “IT industry” (6.9%), “Hallyu stars” (6.6%), and “Dramas” (6.4%). Many overseas Hallyu consumers associated cultural content with Korea.

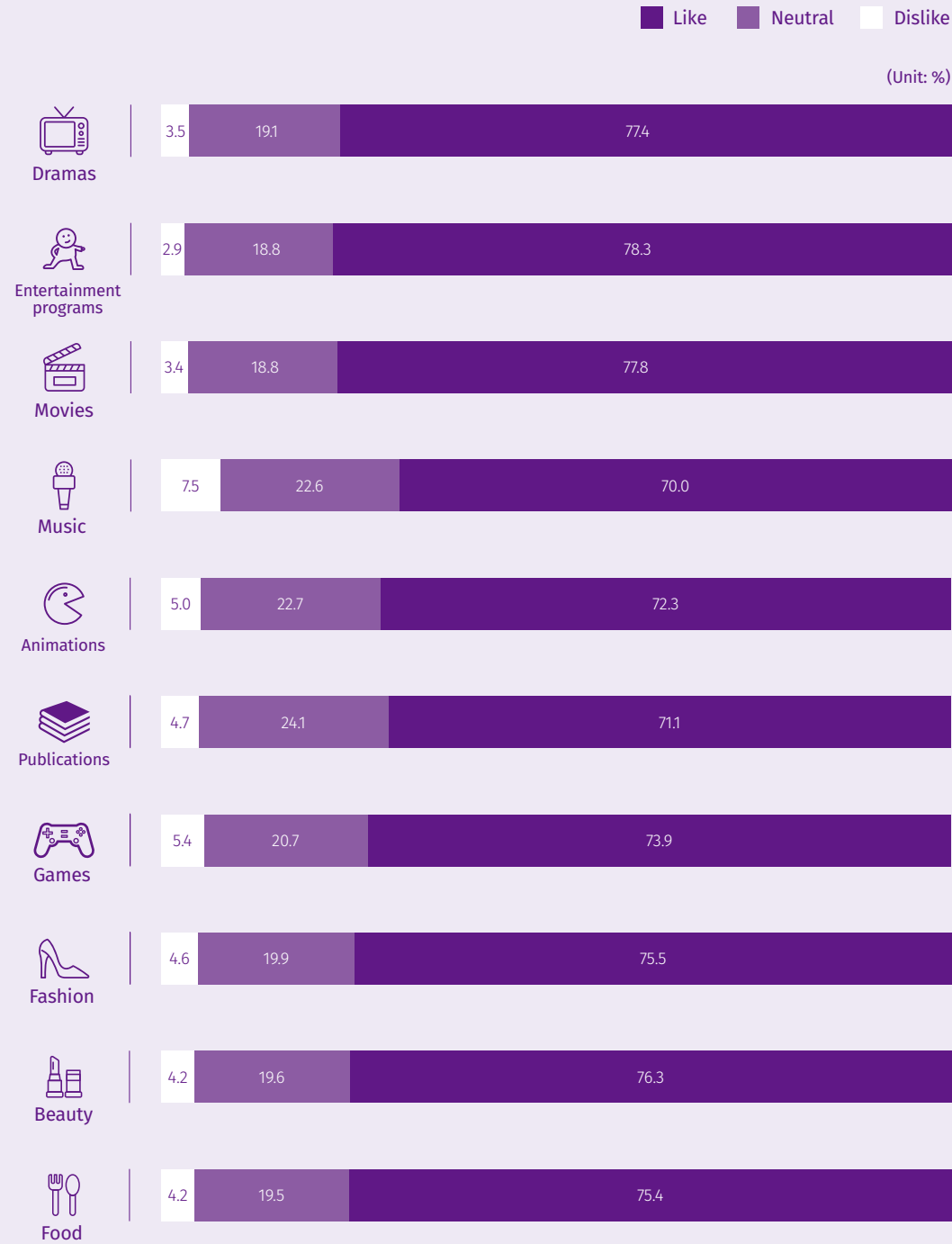


Changes in perception of Korea after experiencing Hallyu content

Notably, 58.8% responded that their perception of Korea had changed positively after experiencing Hallyu content, a similar response rate to 2019. South and Southeast Asian countries including India (77.6%), Thailand (75.8%), Indonesia (74.0%), and Vietnam (73.4%) showed relatively high rates of positive change, whereas Europe (48.7%) and Japan (28.2%) showed low rates.

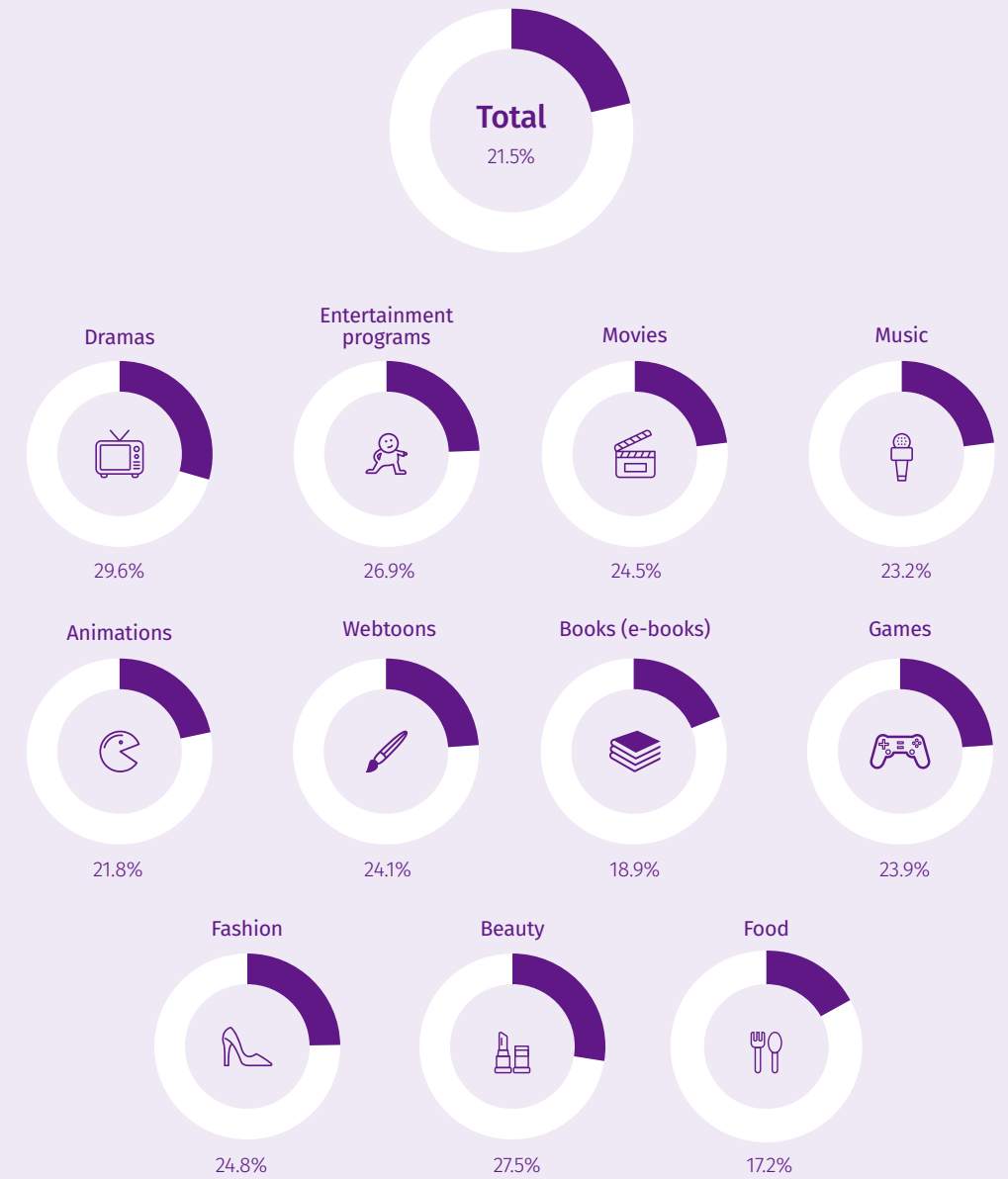


Favorability of Hallyu content



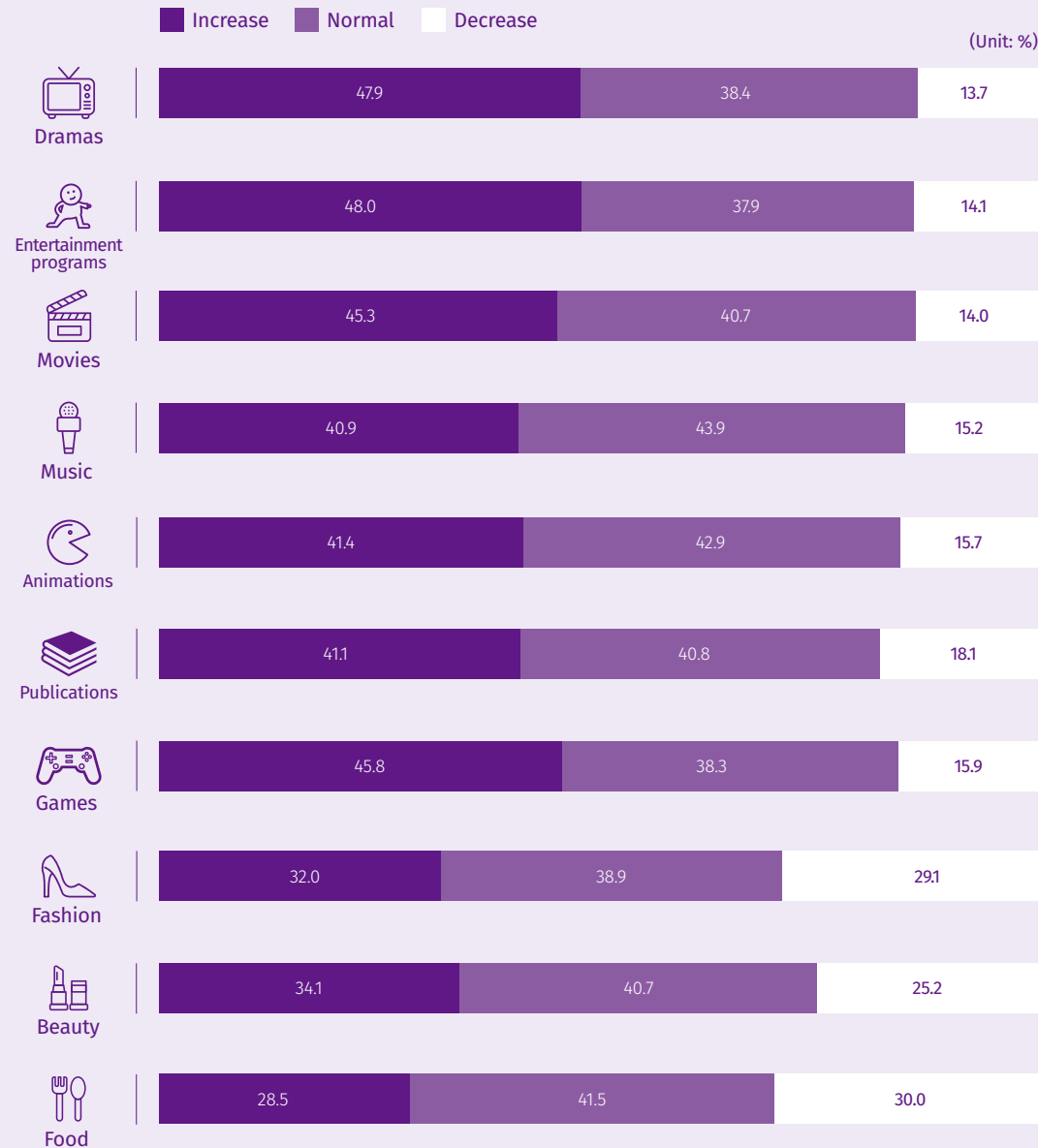
Consumption of Hallyu content by type

Of the types of cultural content consumed by overseas Hallyu consumers, Korean “Dramas” was the most commonly consumed at 29.6%, followed by “Beauty” (27.5%), “Entertainment programs” (26.9%), “Fashion” (24.8%), and “Movies” (24.5%).



Changes in consumption of Hallyu content compared to before the COVID-19 outbreak

The types of Korean content that saw increased consumption after the COVID-19 outbreak were mainly “Games” (45.8%) and video content such as “Entertainment programs” (48.0%) and “Dramas” (47.9%). In contrast, consumption greatly declined for products and services where face-to-face consumption is important, such as “Food” (30.0%), “Fashion” (29.1%), and “Beauty” (25.2%).

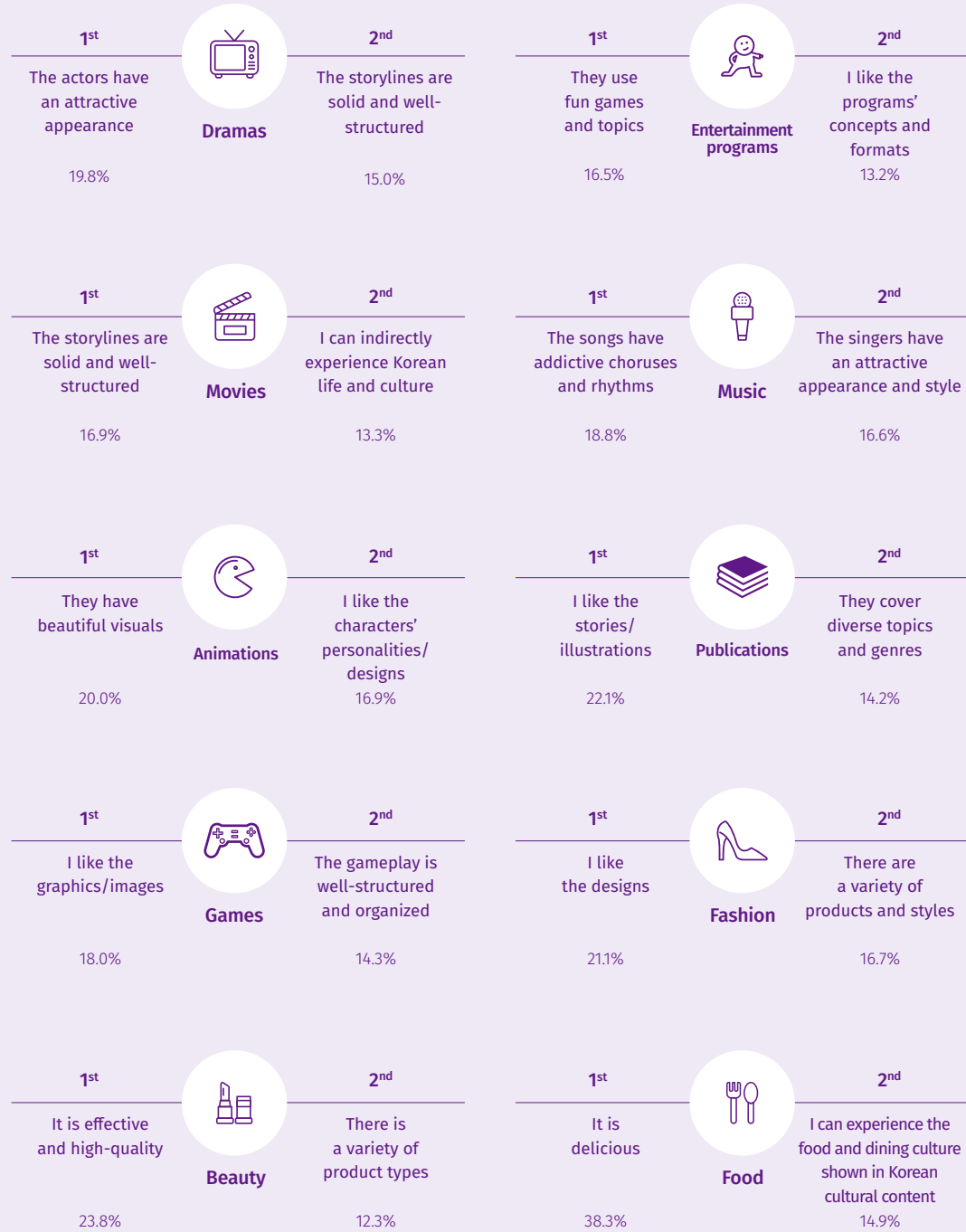


Access to Hallyu content

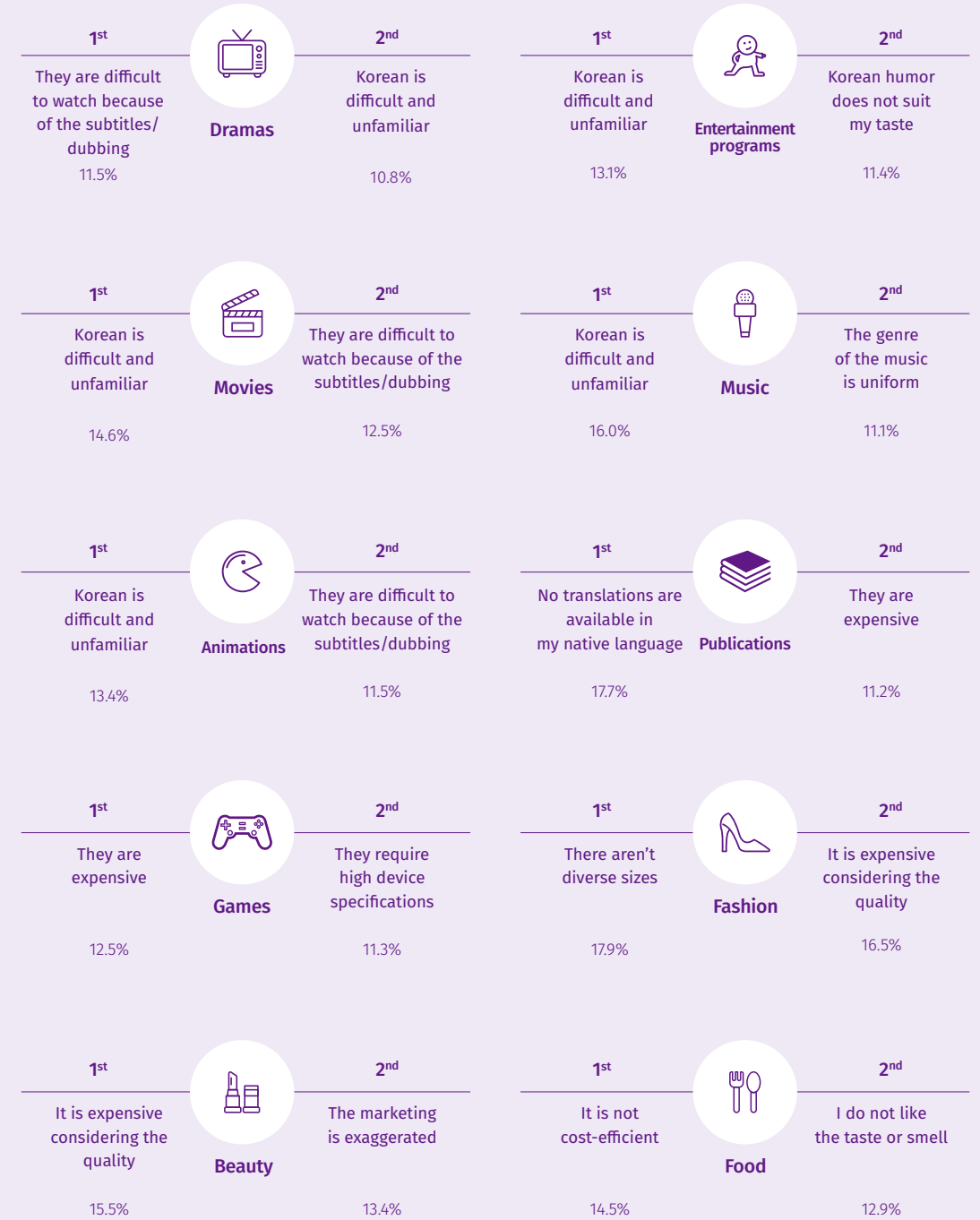
The respondents primarily accessed Hallyu content through “online/mobile platforms,” “TV,” and “Korean videos.” They mostly used “online/mobile platforms” and “TV” to access dramas, entertainment programs, and movies; “local/global sites/apps” to access publications; and “videos/photos on social media” and “Korean videos” to access fashion, beauty, and food.



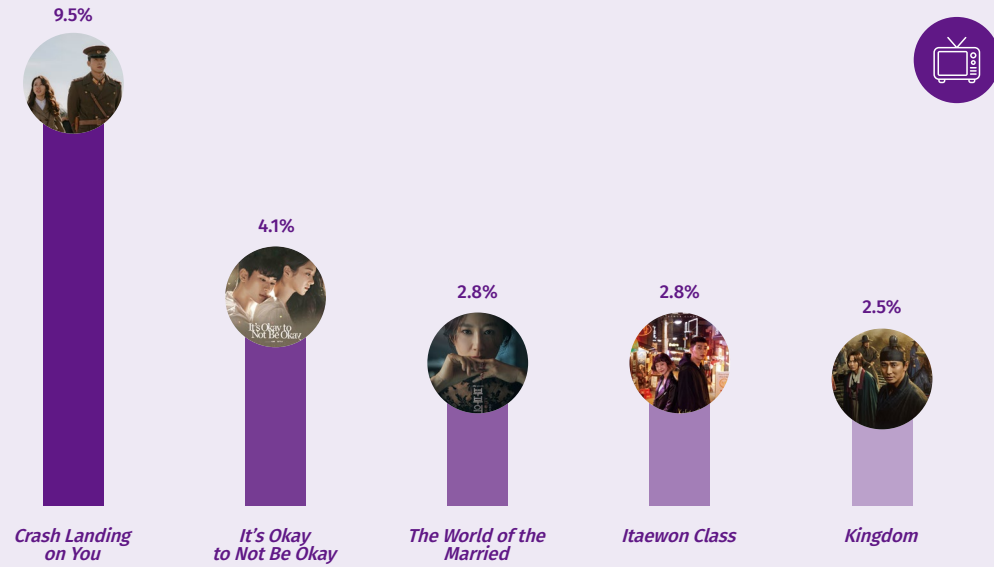
Popularity factors of Hallyu content



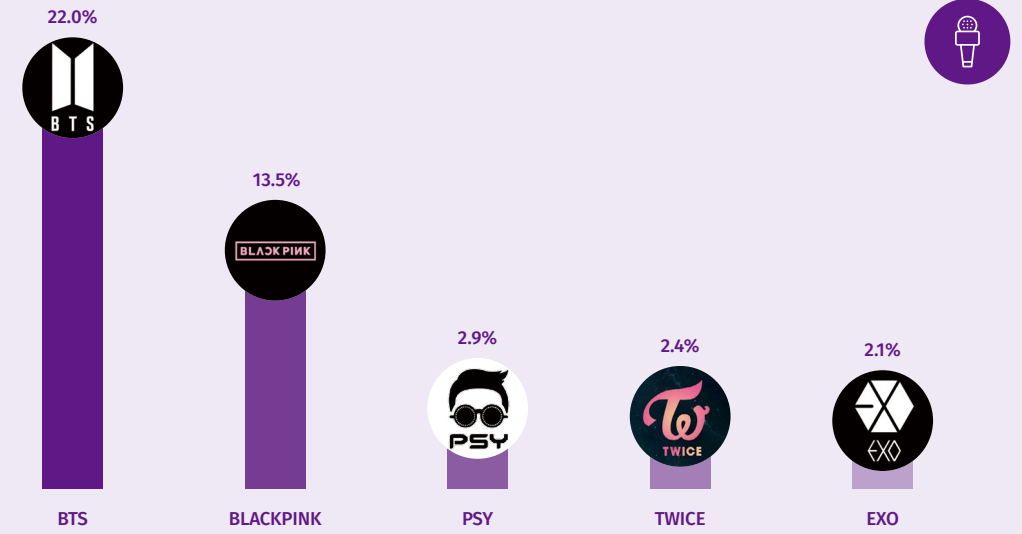
Factors hindering the popularity of Hallyu content



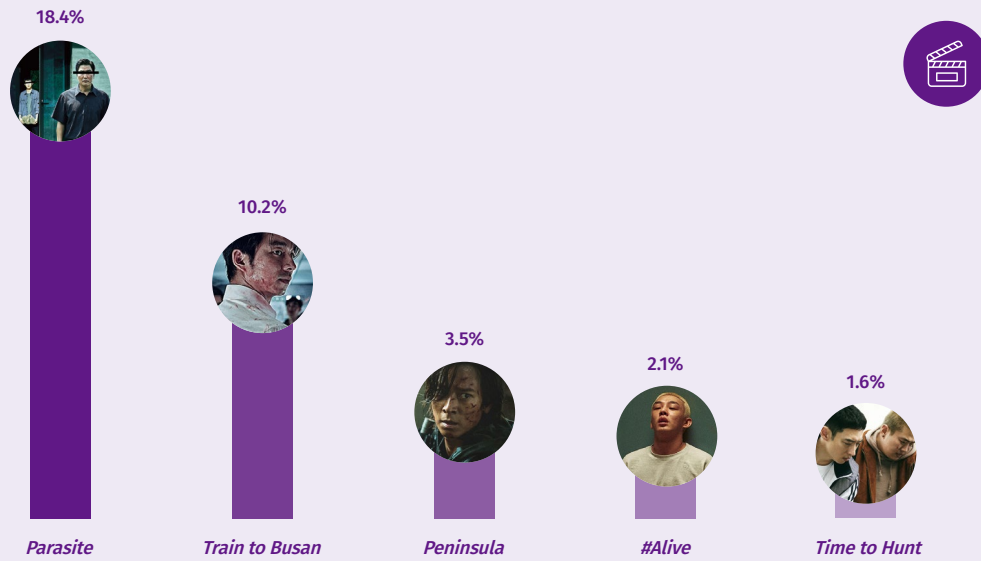
Popular Korean dramas



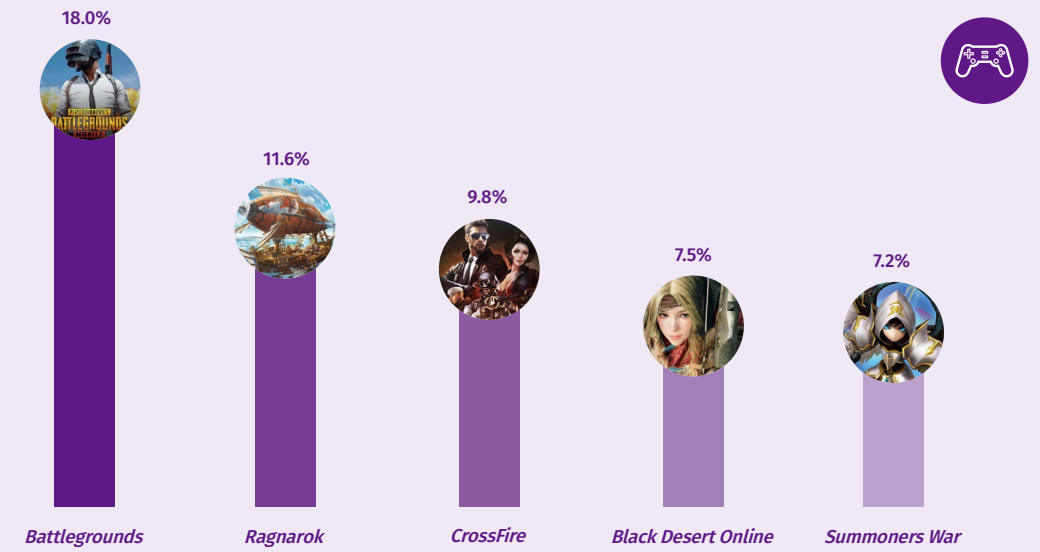
Popular Korean singers/groups



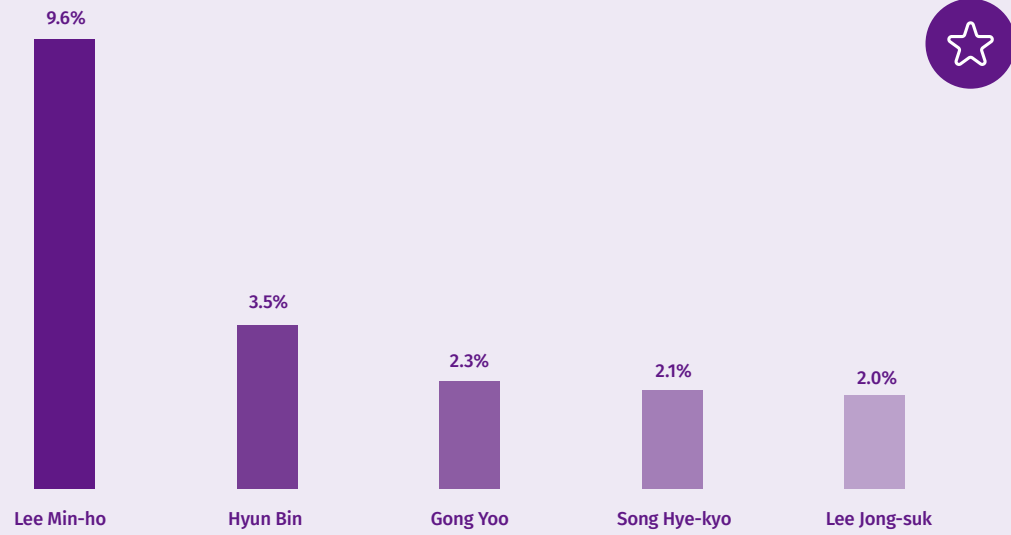
Popular Korean movies



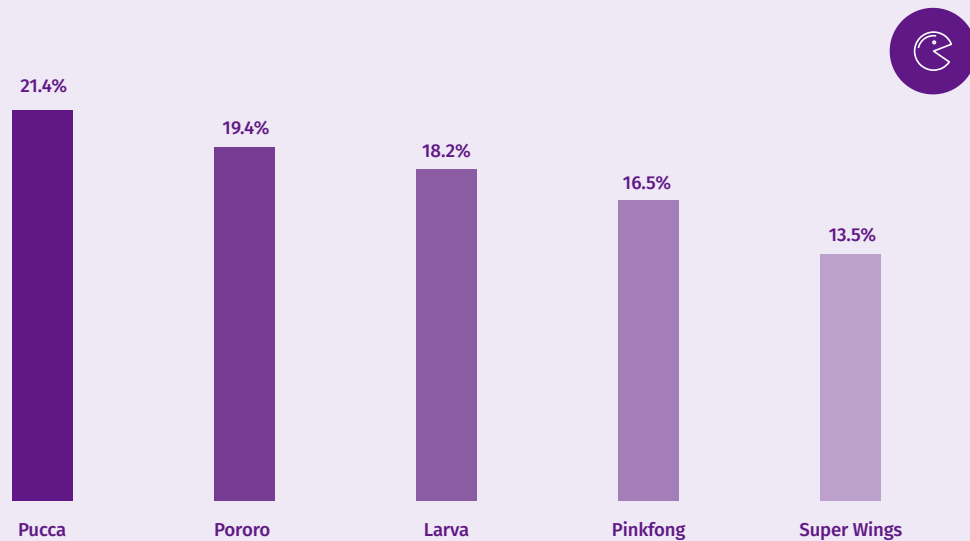
Popular Korean games



Popular Korean actors



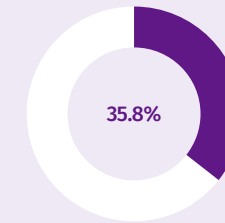
Popular Korean characters (animation)



Intention to use Hallyu content in the future

1. Intention to spend on Hallyu content in the future

Of the total respondents, 35.8% expected an increase in their intention to spend on Hallyu content in a year.

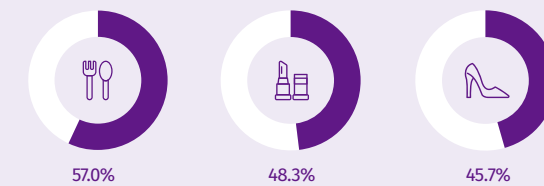


2. Countries showing high intention to spend on Hallyu content



3. Intention to pay for Hallyu content in the future

The intention to pay for Hallyu content was the highest for “Food” (57.0%), followed by “Beauty” (48.3%) and “Fashion” (45.7%).



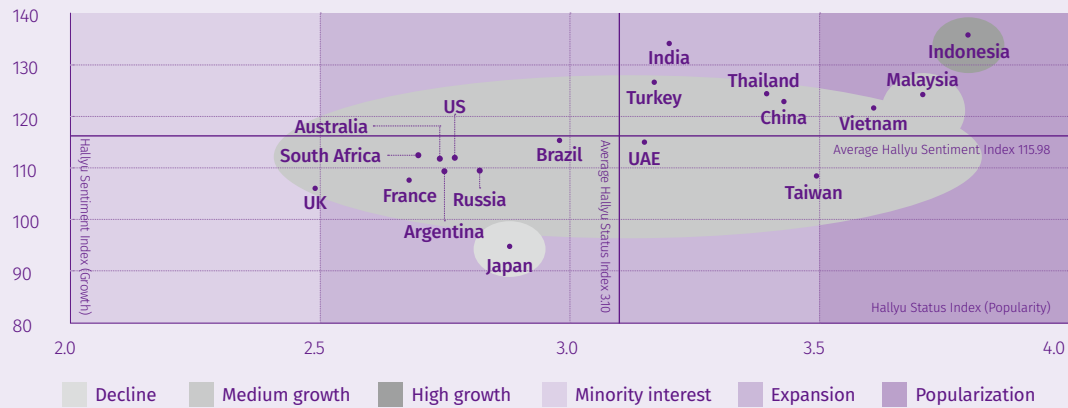
4. Countries showing high intention to pay for Hallyu content



Hallyu index and usage expansion indicators by country

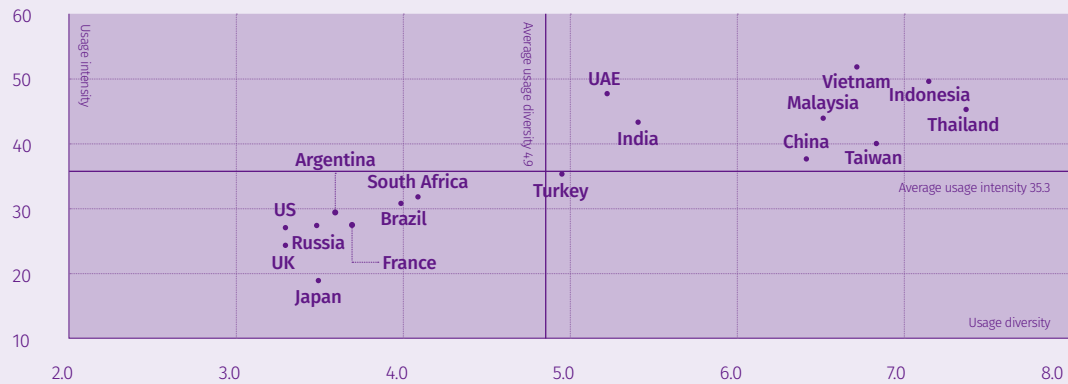
Hallyu has become more mainstream in the countries where Hallyu is most popular, including Indonesia, Malaysia, Taiwan, China, and India. Countries topping the Hallyu Status Index (Vietnam, Indonesia, Thailand, etc.) showed both high usage diversity and usage intensity, whereas low-ranking countries such as the UK and Japan displayed both low usage intensity and usage diversity.

Hallyu Index by Country



***Hallyu Index:** Indicators reflecting the degree to which Korean popular culture has been accepted by consumers abroad and its tendency to grow or decline, measured separately by the "Hallyu Status Index," which indicates the current popularity and popularization of Hallyu, and the "Hallyu Sentiment Index," which indicates the rate of growth and decline of Hallyu.

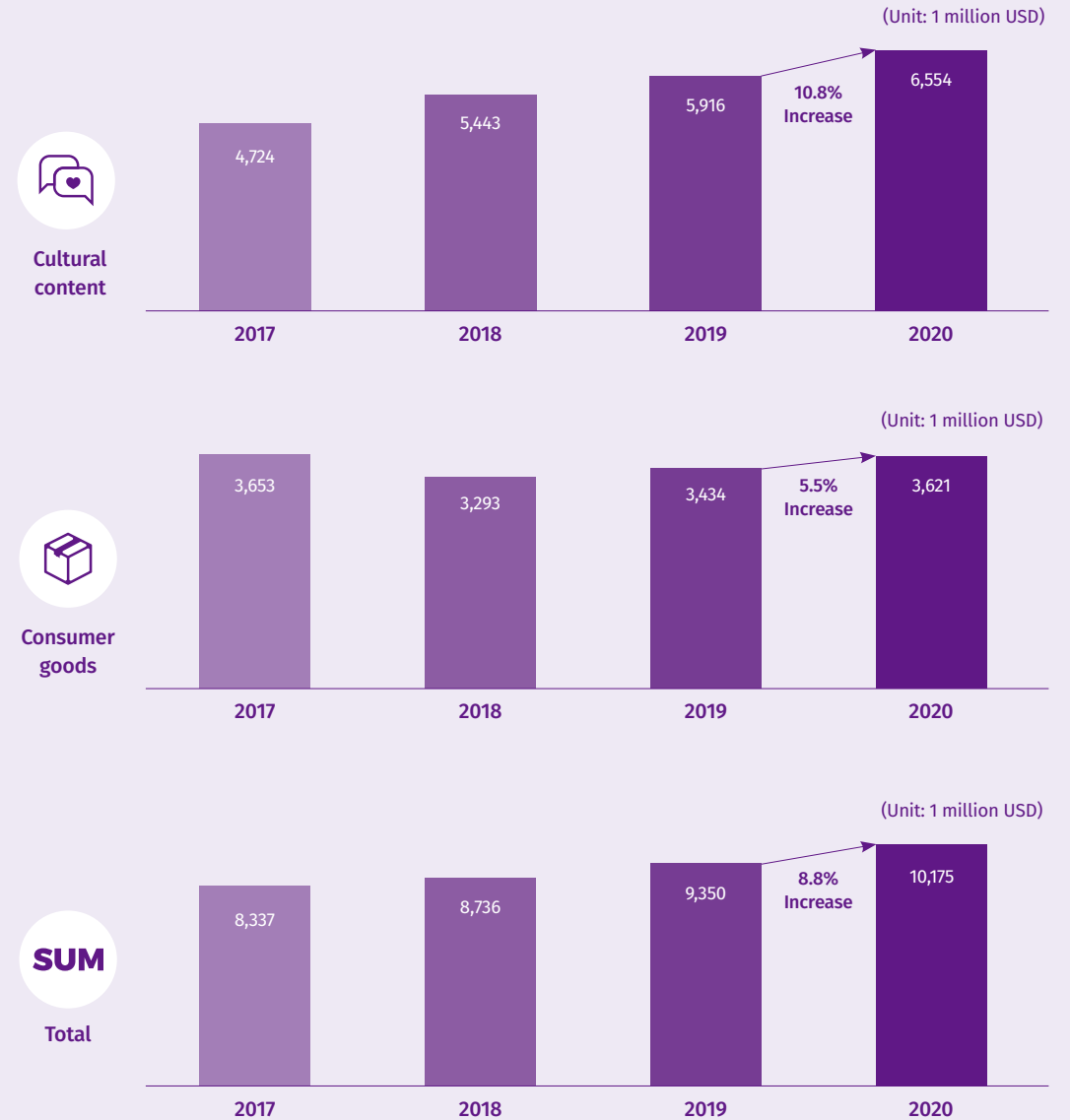
Hallyu Usage Expansion Indicators by Country



***Usage diversity:** The degree of diversity to which respondents consume Korean popular culture (measured from 1 to 10)
****Usage intensity:** The degree of intensity to which respondents consume a specific type of Korean popular culture (measured from 1 to 100)

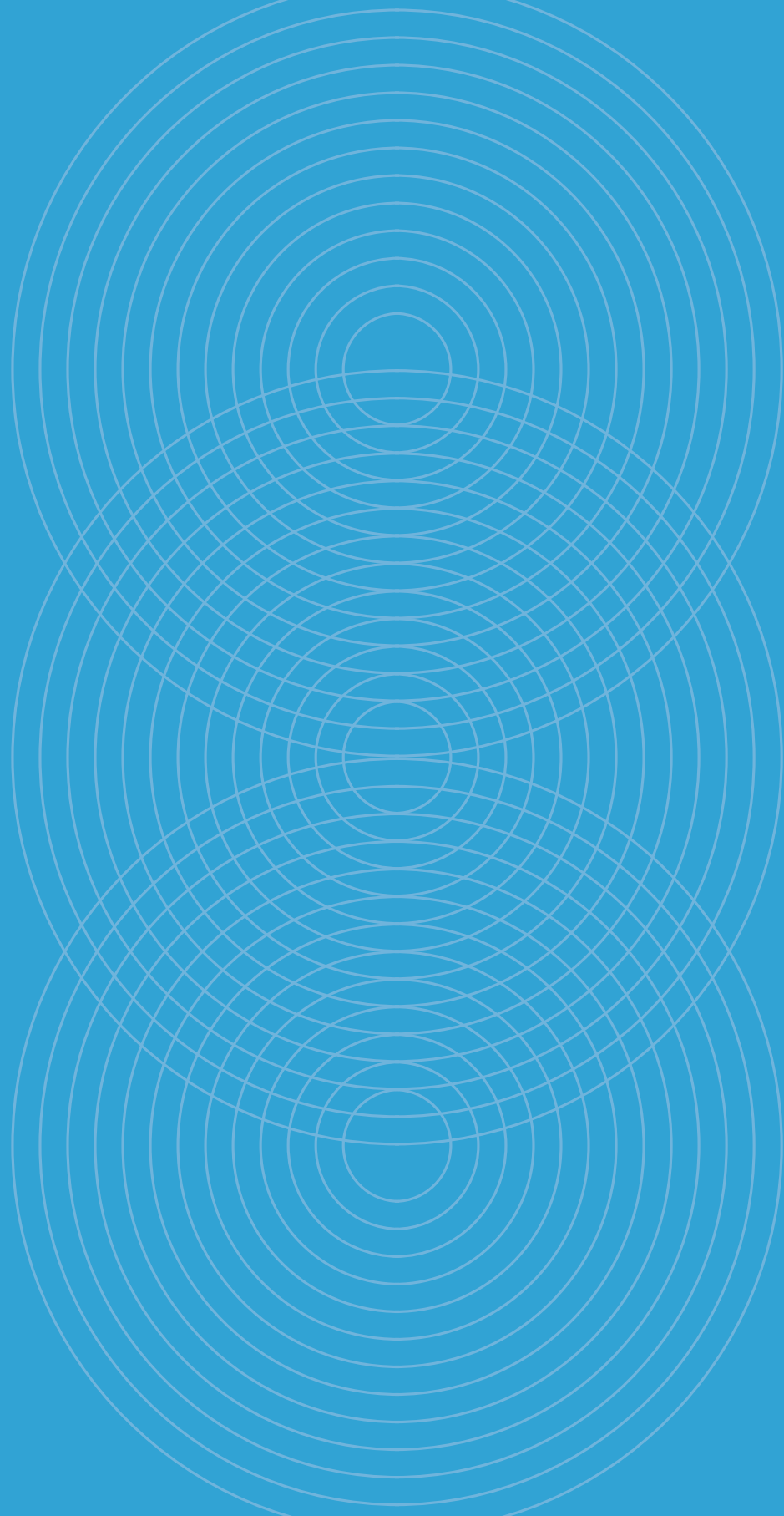
Exports related to Hallyu

In 2020, \$10.175 billion in exports were attributed to Hallyu, up 8.8% from 2019. In spite of the COVID-19 crisis, export of cultural content products due to Hallyu amounted to \$6.554 billion (up 10.8%), while export of consumer goods also grew by 5.5%.



*As the tourism industry greatly contracted due to the direct impact of COVID-19, tourism was excluded from the total.

2021 Major Issues in Hallyu



ISSUE 1. Rise of contactless consumption due to COVID-19

ISSUE 2. Soaring growth of content production and distribution by global OTT services

ISSUE 3. Slight increase in favorability and popularity of Hallyu content

ISSUE 4. Popularity of Hallyu content and Hallyu stars becomes concentrated and fixed

ISSUE 5. Lack of new popular content in genres optimized for contactless consumption (games and animation)

ISSUE 6. Widening gap in popularization, growth, and consumption of Hallyu among countries

Rise of contactless consumption due to COVID-19

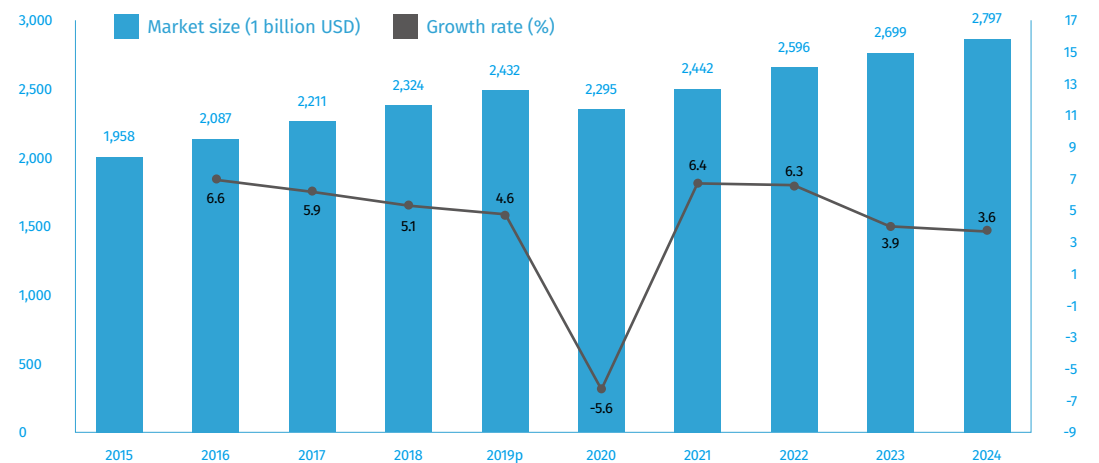
COVID-19 forces shift to contactless consumption

The COVID-19 pandemic plunged the world into chaos in 2020, severely affecting the content industry's size and triggering a paradigm shift in consumption. After growing at an annual average of about 5% since 2015, the global content industry contracted by 5.6% compared to 2019, with particularly large declines in the film, animation, and music industries.

The film and animation markets shrank by a third due to various difficulties, such as delays in theatrical releases—a key sales channel—and the accompanying closure of multiplexes and production delays. These two industries are not expected to recover to their pre-COVID (2019) sales volume until 2024. Regarding the music industry, despite the streaming market's steady growth, the pandemic has made it challenging to hold offline performances (concerts) and sell related products.

In contrast, games and broadcasting benefited from the spread of contactless consumption. These industries grew by 10% and shrank by 6%, respectively, displaying a trend distinct from other industries. The game industry's growth is attributed to the increase in mobile game users (a market considered to have reached the stage of maturity), the spread of the stay-at-home culture, and the rise in console sales following the start of a new console generation. Meanwhile, the broadcasting industry's decline is relatively small, as the launch of new global OTT services and growth in the subscriber base of existing providers such as Netflix partially compensated for the decrease in TV broadcast sales (KOCCA, 2020).

Size and Forecast of Worldwide Content Market (2015-2024)



*Source: KOCCA (2020). 2020 Overseas Content Market Analysis

Korean game and video content benefits from the COVID-19 pandemic

Size and Forecast of Worldwide Content Market by Genre (2015-2024)

Unit: 100 million USD, %

Classification	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2019-24 CAGR
Publications	2,918	2,893	2,839	2,798	2,764	2,482	2,530	2,531	2,512	2,494	-2.04
Comics	72	78	76	80	90	86	89	89	90	90	-0.02
Music	463	486	514	543	580	408	519	648	671	689	3.51
Games	827	956	1,087	1,201	1,317	1,429	1,548	1,638	1,726	1,815	6.63
Movies	387	401	419	435	451	155	276	373	387	399	-2.40
Animations	50	68	53	50	83	28	51	69	71	73	-2.50
Broadcasting	4,609	4,765	4,826	4,895	4,906	4,622	4,848	5,024	5,124	5,263	1.42
Advertising	4,708	5,006	5,218	5,696	6,054	5,434	5,802	6,199	6,422	6,635	1.85
Knowledge information	6,680	7,282	7,910	8,360	8,778	8,646	9,112	9,727	10,201	10,651	3.94
Characters/licenses	2,517	2,629	2,716	2,803	2,928	2,763	2,940	3,126	3,249	3,367	2.83
Arithmetic sum	23,232	24,562	25,724	26,861	27,951	26,055	27,715	29,425	30,454	31,476	-
Total	19,576	20,872	22,109	23,244	24,320	22,949	24,420	25,964	26,987	27,966	2.93

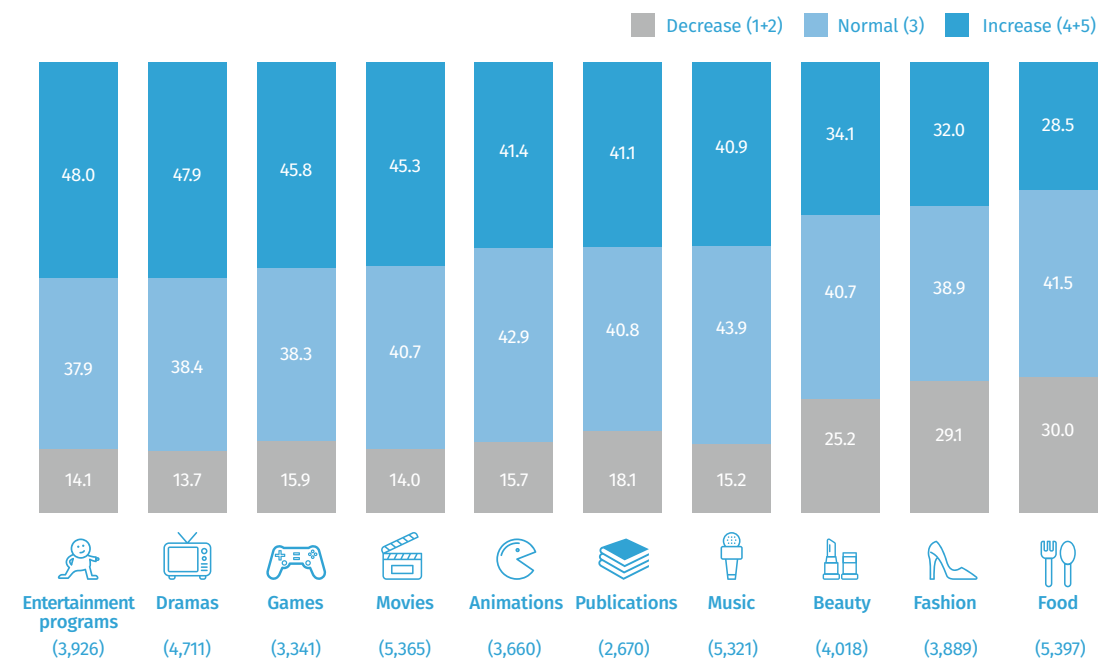
*Source: KOCCA (2020). 2020 Overseas Content Market Analysis

Korean cultural industries were not able to avoid the pandemic's impact. Certain shifts in the market mirrored global trends—namely, the beneficial spread of contactless consumption of games and video content, and the drop in film and animation exports. Overseas consumption of beauty, fashion, and food, in which offline purchase channels are critical, also saw a marked decline. Hallyu content export increased by 11.9% in 2020 compared to 2019, which is largely attributed to the 18.9% growth in games that comprised 80% of total exports. Consistent with global market trends, broadcasting (-6.7%) showed a much smaller decline in exports than film (-33.2%) and animation (-33.5%) thanks to the global OTT distribution network.

We can more directly examine the influence of COVID-19 through the experiences of overseas Hallyu consumers. Compared to 2019 (before the COVID-19 outbreak), there were more users whose consumption of Korean video content (entertainment programs, dramas, movies, etc.) and games increased rather than decreased or stayed the same. Conversely, beauty, fashion, and food showed relatively large drops in consumption, indicating a decline in face-to-face services.

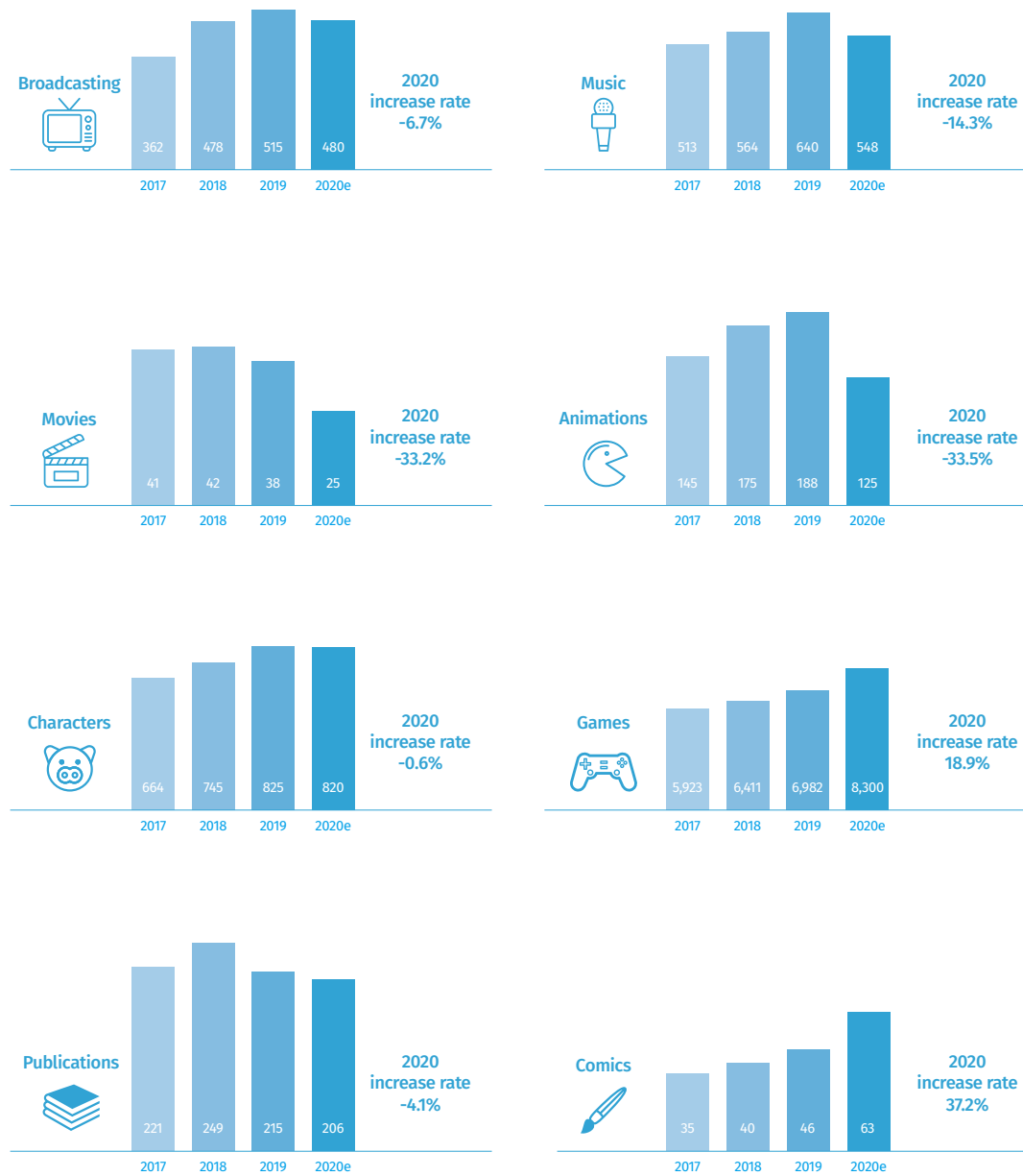
Change in Consumption of Hallyu Content Compared to Before COVID-19

BASE: Content users within the past year, n=(), unit: %



Export value of cultural content products

Unit: 100 million USD, %



Export value of cultural content products due to Hallyu

Unit: 100 million USD, %








**Soaring growth of content production and distribution
by global OTT services**

Influence of OTTs boosted by the COVID-19 pandemic

As is well known, the pandemic-led spread of contactless consumption has strengthened OTT services' influence on the video content industry. In terms of trends in overseas consumers of Korean video content via online and mobile platforms, the share of dramas soared from 47.4% in 2016 to 76.9% in 2020, with sizable growth of 8%p from 2019 as well. Entertainment programs, movies, and animation also increased by around 30%p compared to 2016 and 5-7%p compared to 2019, demonstrating OTTs' growing influence on Hallyu video content. Among these OTT services, Netflix's growth in market share is noteworthy; while YouTube's usage rate declined by 2-8%p, depending on the genre, compared to 2019, Netflix's increased by an average of 15%p during the same period. Particularly, Netflix's usage rate of Korean dramas and movies was 63-64%, surpassing entertainment programs (56.8%) and animations (53.2%).

Access to Korean video content

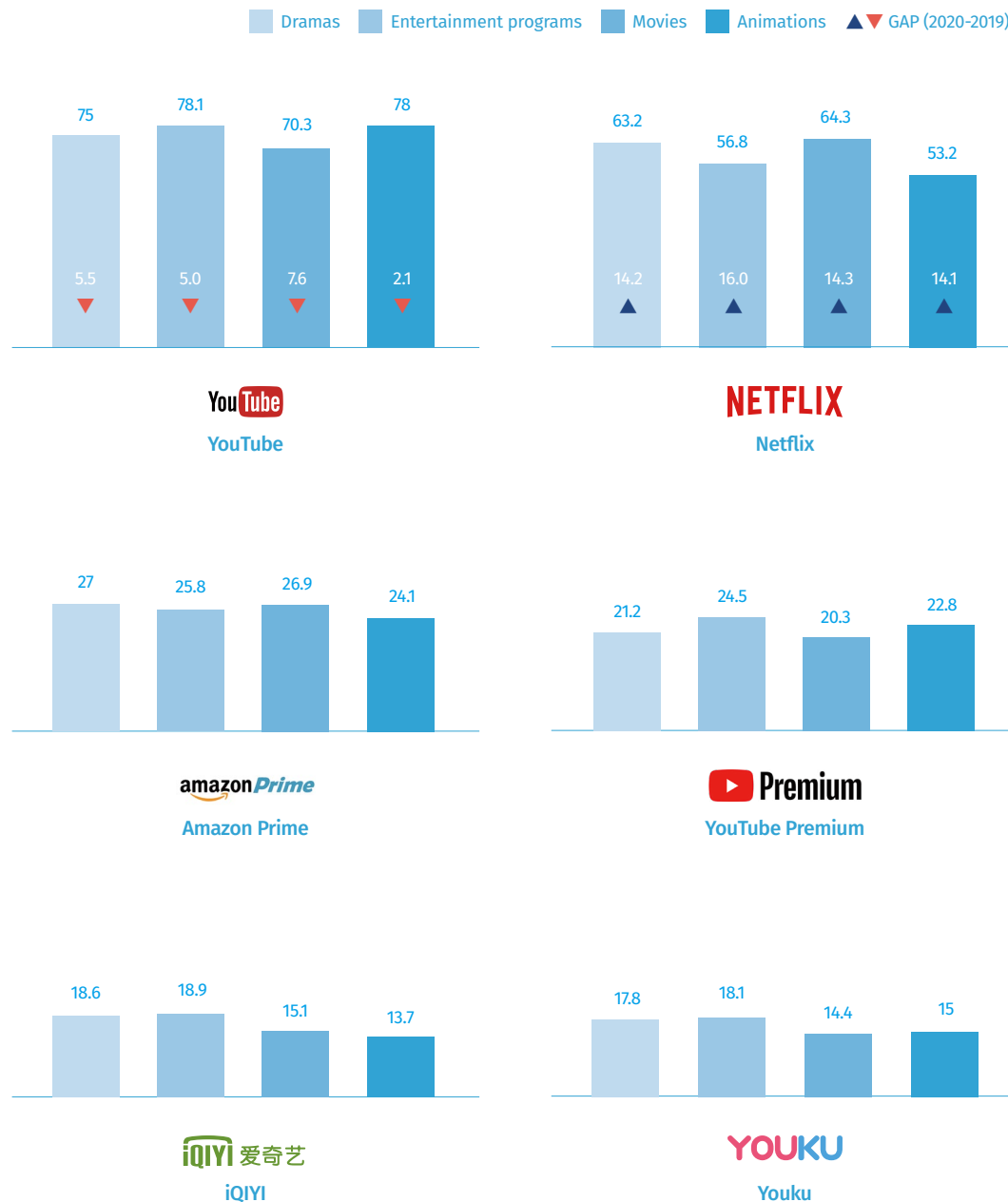
BASE: Previous consumers of Korean cultural content, unit: %, multiple response

		2016	2017	2018	2019	2020
Dramas 	No. of responses	(5,520)	(4,639)	(5,235)	(5,563)	(4,143)
	Online/mobile platforms	47.4	57.7	72.1	68.9	76.9
	TV	64.2	63.5	60.1	64.7	68.0
	Offline	-	-	18.9	18.3	20.9
	Other	-	-	-	2.5	0.2
Entertainment programs 	No. of responses	(5,041)	(4,038)	(4,652)	(4,892)	(3,569)
	Online/mobile platforms	48.7	60.2	70.2	71.2	78.8
	TV	60.6	62.6	57.5	62.3	66.7
	Offline	-	-	14.3	14.1	18.9
	Other	-	-	-	1.9	0.3
Movies 	No. of responses	(5,331)	(5,336)	(5,482)	(5,801)	(4,704)
	Online/mobile platforms	45.0	56.8	69.8	67.5	72.5
	TV	54.5	60.6	54.7	58.3	61.5
	Offline	-	-	24.4	24.9	27.6
	Cinema	-	-	-	25.7	23.9
Music 	No. of responses	(5,359)	(5,214)	(5,248)	(5,665)	(4,695)
	Online/mobile platforms	52.2	62.3	83.6	77.5	82.0
	TV	49.5	55	47.6	52.6	50.4
	Offline	-	-	14.5	18.8	19.0
	Radio	-	-	-	18.3	15.4
Animations 	No. of responses	(4,381)	(4,052)	(4,218)	(4,252)	(3,782)
	Online/mobile platforms	49.4	53.5	72.5	71.1	77.5
	TV	56.8	60.8	48.9	55	55.9
	Offline	-	-	15.5	16.6	19.4
	Other	-	-	-	2.2	0.7

Growing influence of Hallyu content in global OTT services

Main online/mobile platforms used to access Korean video content

BASE: Main online/mobile platforms used to access Korean cultural content, unit: %, multiple response

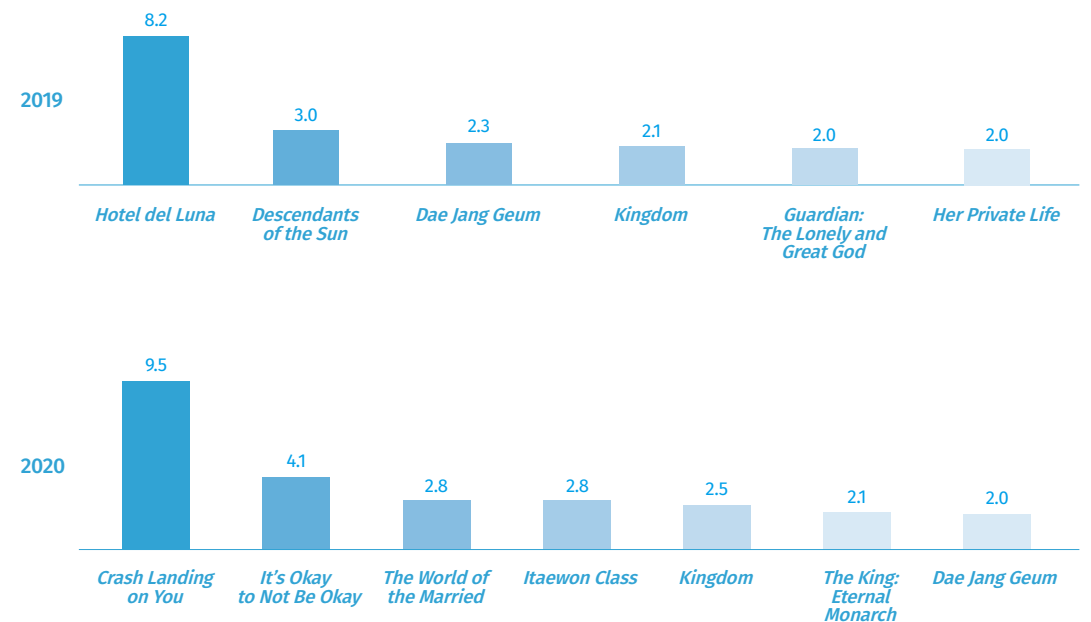


Global OTT services, especially Netflix, have substantially expanded the usage and availability of Korean video content to overseas Hallyu consumers through multinational distribution networks and production of original Korean content. Six works distributed or produced by Netflix dominated the ranking of top Korean dramas in 2020, from *Crash Landing on You* (1st) to *The King: Eternal Monarch* (6th). This is double the three works in the 2019 survey (*Hotel del Luna*, *Kingdom*, and *Guardian: The Lonely and Great God*), indicating the expansion of Netflix's influence.

Similarly, the respondents' favorite Korean movies were all films first released or distributed on Netflix, with the exception of *Parasite*. The ranking of actors also reflects this trend: except for Song Hye-kyo, the five top actors have all appeared in works distributed through Netflix. Notably, thanks to the popularity of *Crash Landing on You* distributed globally by Netflix, Hyun Bin's ranking surged from 14th in 2019 to 2nd in 2020, indicating a huge increase in recognition.

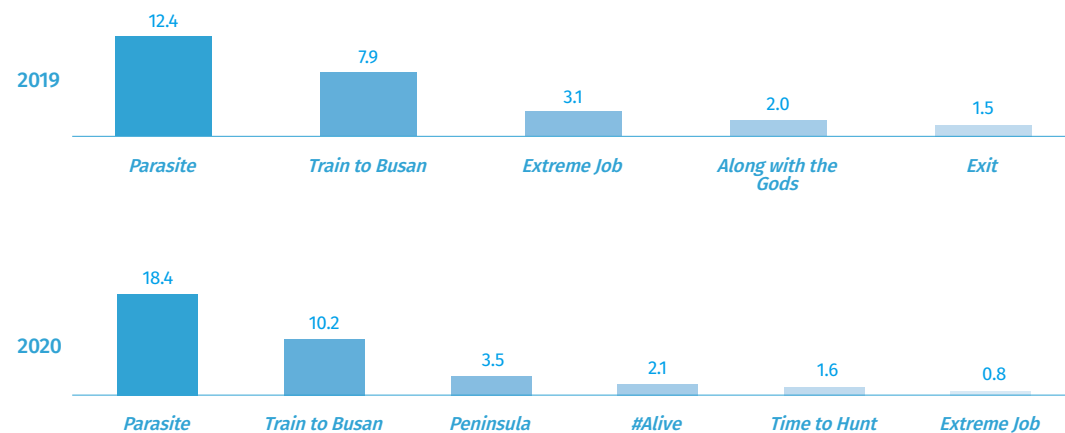
Popular Korean dramas

BASE: Previous consumers of Korean dramas, 2019 (n=5,563), 2020 (n=4,143), unit: %, Excluding "None" / "Don't know" (18.2%)



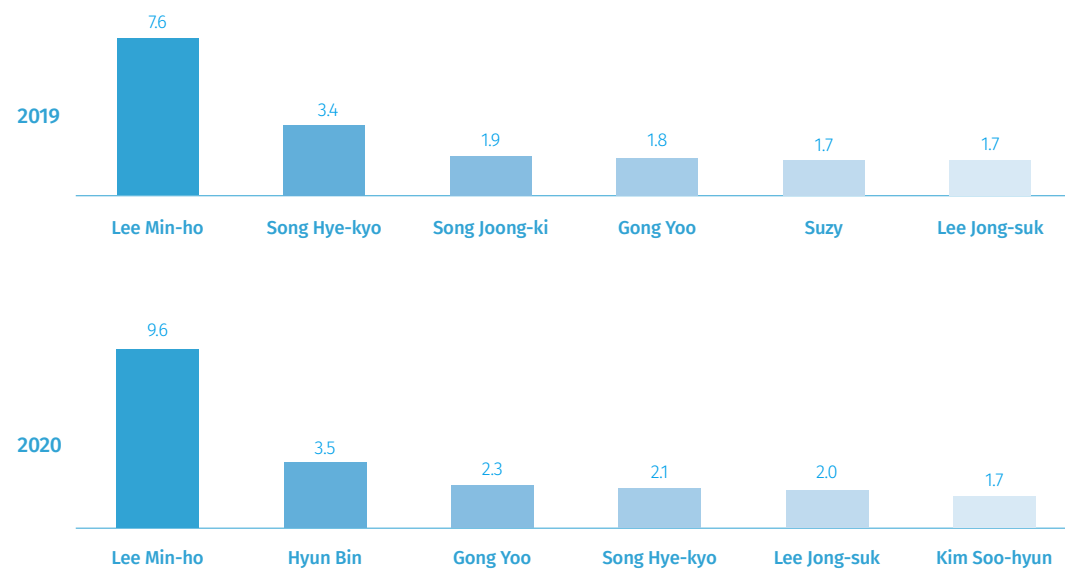
Favorite Korean movie

BASE: Previous consumers of Korean movies, 2019 (n=5,801), 2020 (n=4,143), unit: %, Excluding "None" / "Don't know" (28.7%)



Favorite Korean actor

BASE: 2019 total (n=8,000), 2020 total (n=8,500), unit: %, Excluding "None" / "Don't know" (18.2%)



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Slight increase in the favorability and popularity of Hallyu content

All 10 content categories record favorability above 70%

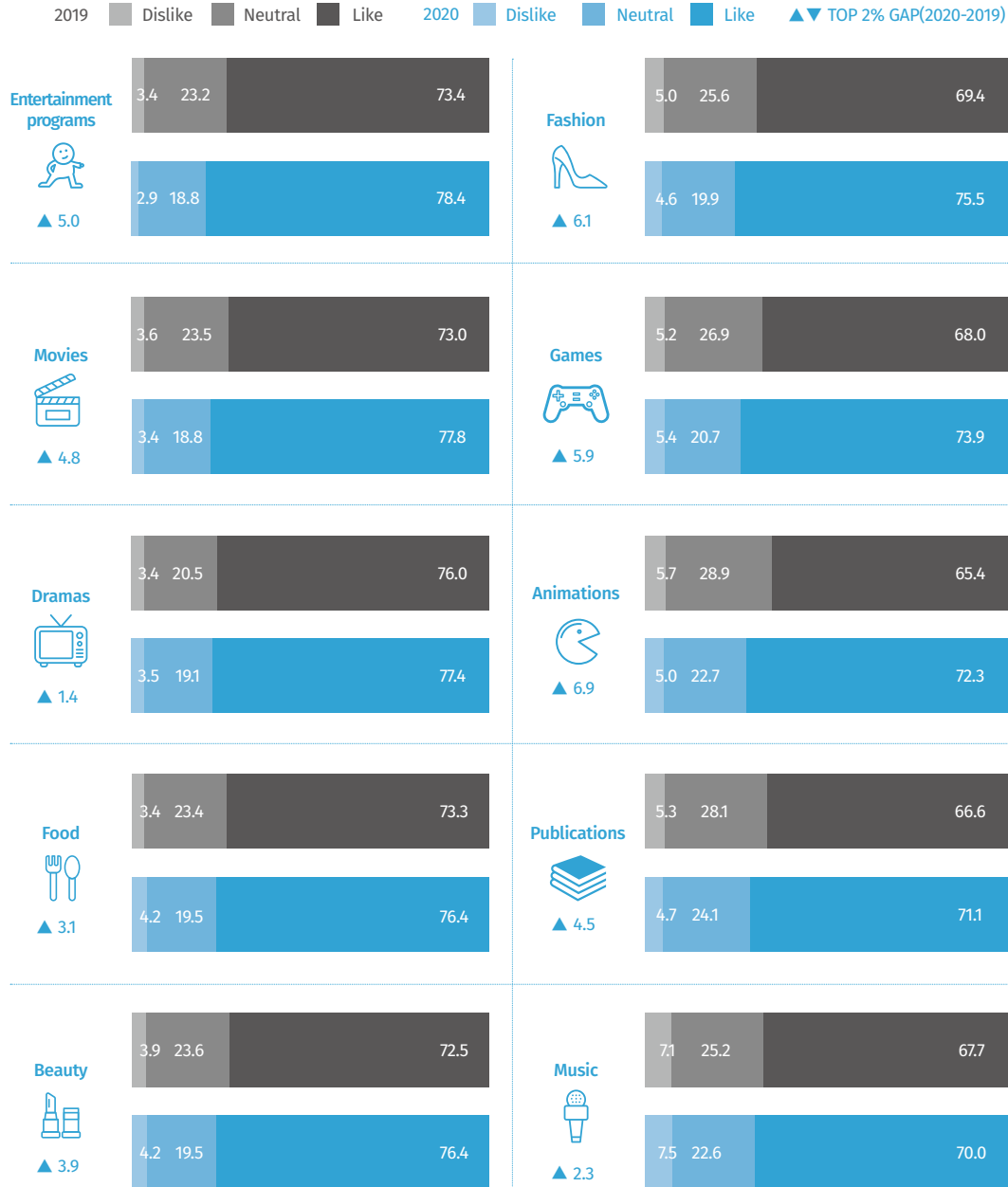
Respondents displayed a high favorability for Hallyu content, with all 10 categories recording above 70% and each increasing by 1-7%p compared to 2019. Only five categories (dramas, entertainment programs, food, movies, and beauty) exceeded 70% in the 2019 survey, whereas in 2020, synergies were produced among the different Korean content categories. This is significant in terms of Hallyu's sustainability and genre diversification.

Specifically, entertainment programs (78.3%), movies (77.8%), dramas (77.4%), food (76.4%), and beauty (76.3%) had the highest "Like" response rate, while K-Pop had the lowest "Like" (70.0%) and highest "Dislike" (7.5%) response rate. This indicates that notwithstanding K-Pop's popularity, many people also harbor a distaste for it.

By region, Asia and Oceania showed high favorability for entertainment programs, movies, and dramas; the Americas for dramas, food, and beauty; Europe for food and beauty; the Middle East for movies; and Africa for dramas.

Favorability of Hallyu content

BASE: Previous consumers of Hallyu content, unit: %



Popularity of K-Pop rose by about 5%p

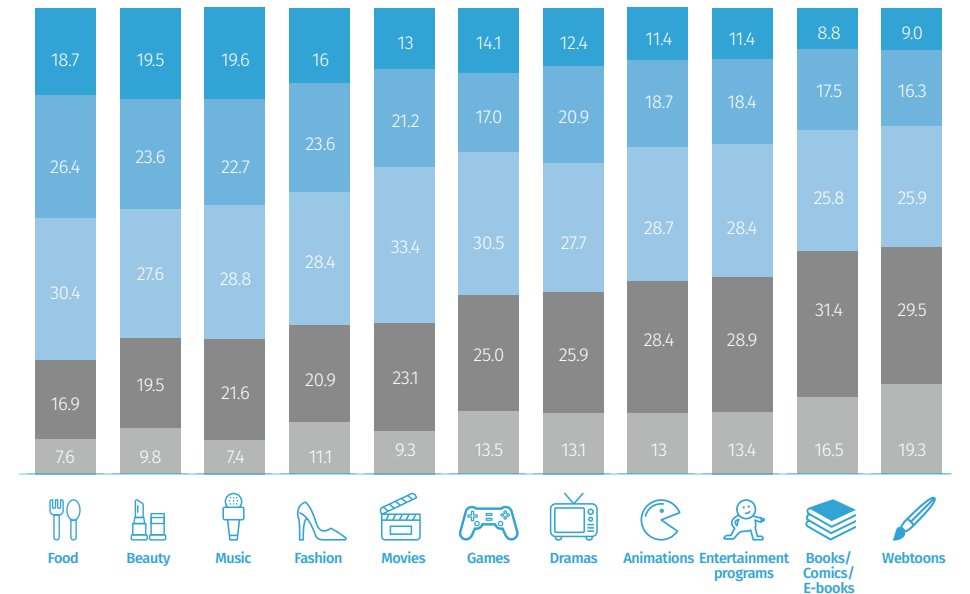
Local popularity of Hallyu content rose by 0.2-4.7%p compared to 2019 for all categories except food (0%). K-Pop in particular became more popular during this period, with an increase of 4.7%p. Food (45.1%), beauty (43.1%), music (42.2%), and fashion (39.6%) were locally the most popular, and of the categories traditionally defined as cultural content, Korean music (K-Pop) was considered the most popular overseas. By country, food, music, and beauty showed the highest popularity in most countries. Only in India did games record the highest popularity, a marked difference from other countries.

Popularity of Hallyu content

BASE: Total (n=8,500), unit: %

- Widely popular among the general public with thriving sales
- Widely known among the general public with moderate sales
- Known among not only some enthusiasts but also a considerable proportion of the general public
- Popular among some enthusiasts
- Almost no users

Category	2020	2019	Gap(20-19)
Food	45.1	45.1	0.0
Beauty	43.1	42.6	▲0.5
Music	42.2	37.5	▲4.7
Fashion	39.6	38.5	▲1.1
Movies	34.2	31.1	▲3.1
Games	33.3	29.9	▲3.4
Dramas	31.1	27.2	▲3.9
Animations	30.0	26.5	▲3.5
Entertainment programs	29.2	27.9	▲1.3
Books/Comics/E-books	26.3	23.3	▲3.0
Webtoons	25.3	25.1	▲0.2

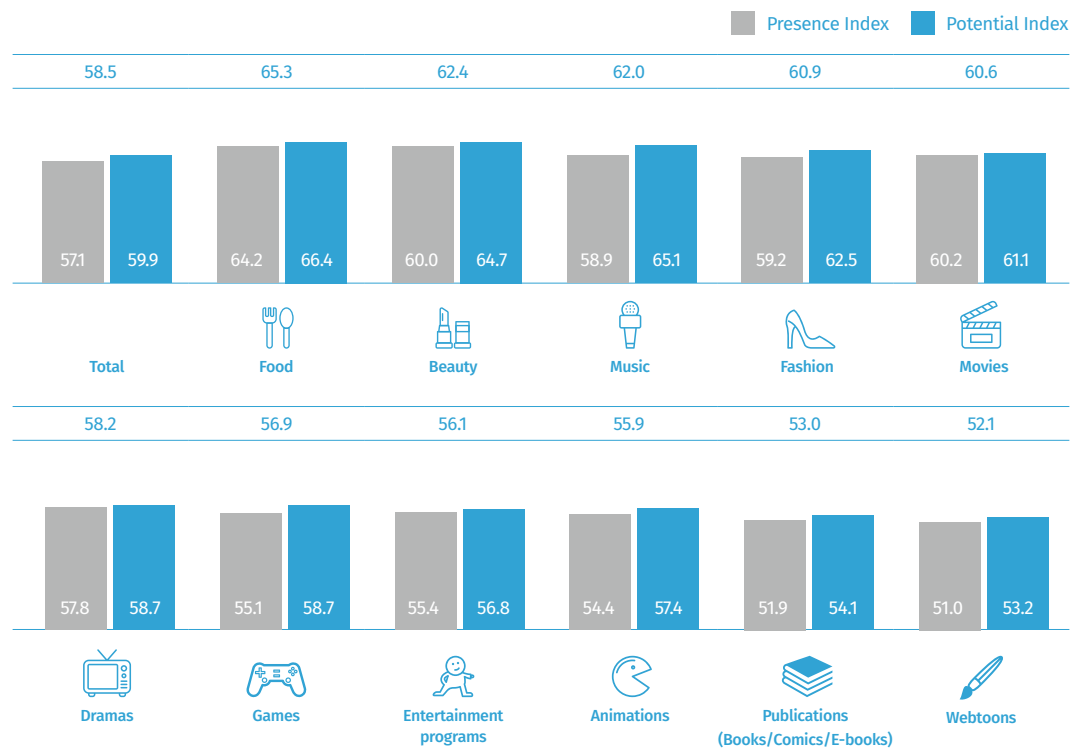


Brand Power Index of Hallyu content: Food (1st), Beauty (2nd), and Music (3rd)

The brand power index (BPI) of Hallyu content, a new addition in the *2021 Overseas Hallyu Survey*, did not greatly differ from the favorability and popularity rankings. The BPI of all Hallyu content was 58.5 (based on a 100-point scale); food (65.3), beauty (62.4), and music (62.0) were relatively high while webtoons (52.1), publications (53.0), and animations (55.9) were relatively low, pointing to the comparatively strong brand power of Korean food, Korean cosmetics, and K-Pop. Food, beauty, and music recorded the highest BPI in most countries, whereas only in India and Turkey did fashion record the highest BPI, a distinct difference from other countries.

Brand Power Index of Hallyu Content

Unit: points (out of 100)



*Presence Index: Measures the respondent's attitude toward Hallyu content based on the average score from a 100-point scale (20, 40, 60, 80, or 100 points)

**Potential Index: Measures the popularity of different Hallyu content in the respondent's country based on the average score from a 100-point scale (20, 40, 60, 80, or 100 points)

***Brand Power Index: Weighs the Presence Index and Potential Index by 50% each and converts to 100 points

2 0 2 1
GLOBAL
HALLYU
TRENDS

Popularity of Hallyu content and Hallyu stars becomes concentrated and fixed

Singers:

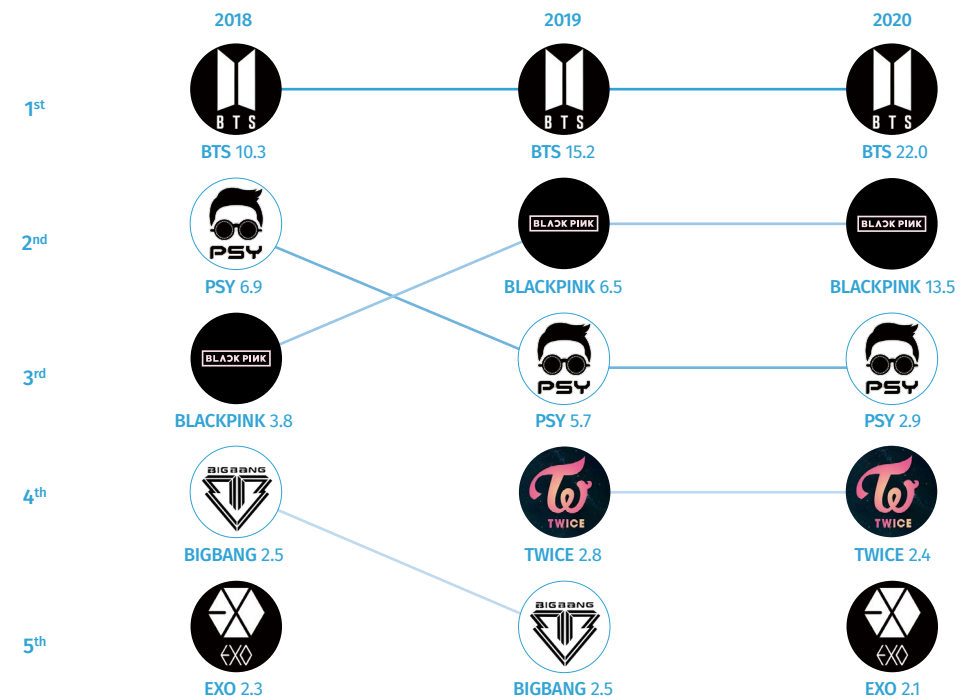
Widening popularity gap between BTS/BLACKPINK and other groups

BTS and BLACKPINK's duopoly in K-Pop is solidifying, with the former remaining the most favored artist for three consecutive years since 2018 and the latter rising from third in 2018 to second in 2019 and 2020. Meanwhile, the popularity gap between these two groups and those below them is deepening every year. BTS recorded a preference rating of 10.3% in 2018, which more than doubled to 22.0% in 2020, while BLACKPINK more than tripled from 3.8% to 13.5% during this period.

In contrast, the popularity gap between them and the artists at the third place and lower (PSY, TWICE, EXO, and BIGBANG) is widening every year, with no new singers or groups having entered the top five in three years. This indicates that popularity is becoming concentrated and fixed on just a few singers, a trend that is steadily worsening. This phenomenon coincides with the commencement of BTS and BLACKPINK's world tours that included North America and Europe. Moreover, the fact that groups ranking third and below have relied on past recognition and largely limited their concerts to Asia has contributed to these rankings.

Popular Korean Singer/Groups from 2018-2020

Unit: %



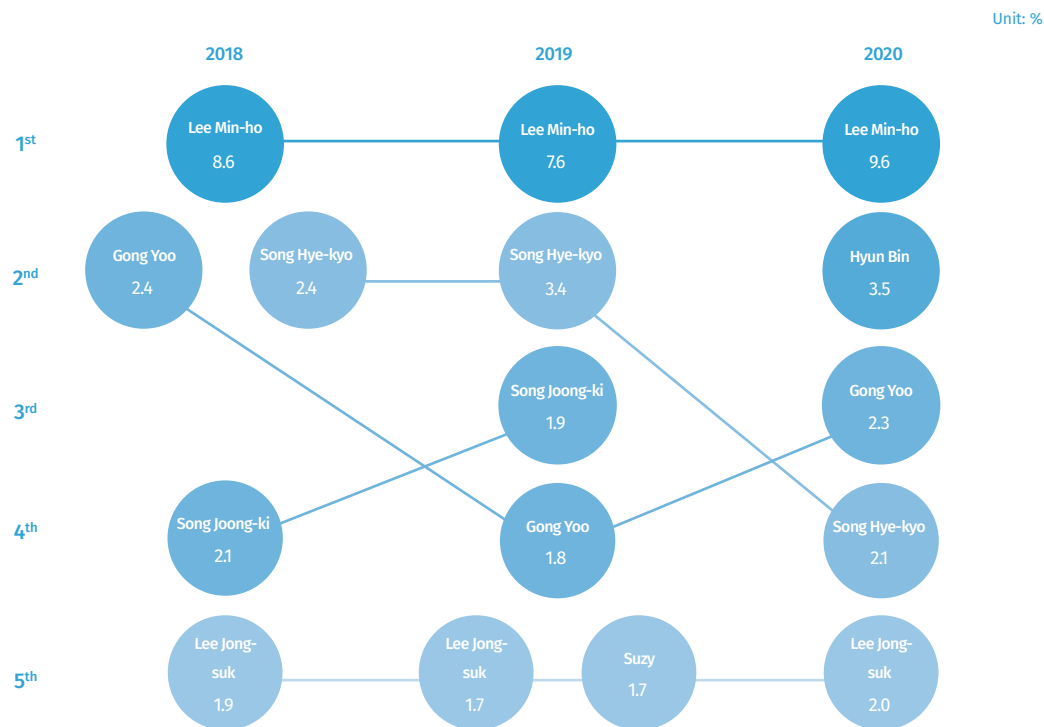
Actors:

Lee Min-ho claims first place for three years in a row as rankings remain fixed

Lee Min-ho topped the ranking of favorite Korean actors for three years in a row, maintaining a stable popularity gap (4.2–6.2%p) with those below him. In the early and mid-2010s, Lee Min-ho enjoyed a sort of first-mover advantage through the sensational popularity of *Boys Over Flowers* and *The Heirs* in Asia, and he maintained high recognition afterwards with *Legend of the Blue Sea* and *The King: The Eternal Monarch*. Particularly, his popularity growth in 2020 (2%p compared to 2019) is largely attributed to *The King: Eternal Monarch*, which was streamed globally on Netflix and ranked sixth amongst dramas.

Gong Yoo, Song Hye-kyo, and Lee Jong-suk also maintained spots in the top rankings for three years in a row, though with a considerable gap from Lee Min-ho. The only other actors included in the top five for three years were Suzy and Hyun Bin, who was boosted by *Crash Landing on You*'s sensational popularity. Thus, the actor rankings have remained rather fixed. Nevertheless, with the growing influence of global OTT companies like Netflix, actors featuring in the OTTs' original dramas will likely enter the rankings in the future.

Popular Korean actors from 2018-2020



Dramas and movies:

Concentration of popularity in top content intensifies

For Korean dramas and movies as well, popularity was highly concentrated in the top-ranking content. In terms of dramas, those distributed globally through Netflix ranked first for three consecutive years, and the gap with those in second place and lower grew. Notably, according to the 2020 survey results, all of the works in the rankings were distributed through Netflix, enabling the expansion of global OTTs' influence within the content industry.

The movie rankings showed similar trends: popularity was concentrated in first place (*Parasite*), and Netflix's sweeping influence was apparent (movies distributed on Netflix all ranked second to fifth). There were two clear differences with the drama rankings: from 2019, a grouping phenomenon occurred between the movies ranked first and second and those ranked third and below, and the gap between them widened. The popularity of *Parasite*, which won four academy awards, and *Train to Busan*, which movie fans worldwide regard as a well-made zombie film, completely dominated the rankings, raising concerns of a lack of content diversity.

Popular Korean dramas from 2018-2020

Unit: %

	2018	2019	2020
1	<i>Mr. Sunshine</i> 4.7	<i>Hotel del Luna</i> 8.2	<i>Crash Landing on You</i> 9.5
2	<i>Descendants of the Sun</i> 3.7	<i>Descendants of the Sun</i> 3.0	<i>It's Okay to Not Be Okay</i> 4.1
3	<i>Guardian: The Lonely and Great God</i> 3.4	<i>Dae Jang Geum</i> 2.3	<i>The World of the Married / Itaewon Class</i> 2.8
4	<i>What's Wrong with Secretary Kim</i> 2.9	<i>Kingdom</i> 2.1	-
5	<i>Are You Human</i> 2.6	<i>Guardian: The Lonely and Great God / Her Private Life</i> 2.0	<i>Kingdom</i> 2.5

Popular Korean movies from 2018-2020

Unit: %

	2018	2019	2020
1	<i>Train to Busan</i> 8.4	<i>Parasite</i> 12.4	<i>Parasite</i> 18.4
2	<i>Be with You</i> 5.8	<i>Train to Busan</i> 7.9	<i>Train to Busan</i> 10.2
3	<i>Along with the Gods: The Two Worlds</i> 4.5	<i>Extreme Job</i> 3.1	<i>Peninsula</i> 3.5
4	<i>Along with the Gods: The Last 49 Days</i> 2.1	<i>Along with the Gods</i> 2.0	<i>#Alive</i> 2.1
5	<i>Burning</i> 2.0	<i>Exit</i> 1.5	<i>Time to Hunt</i> 1.6

**Lack of new popular content
in genres optimized for contactless consumption
(games and animation)**

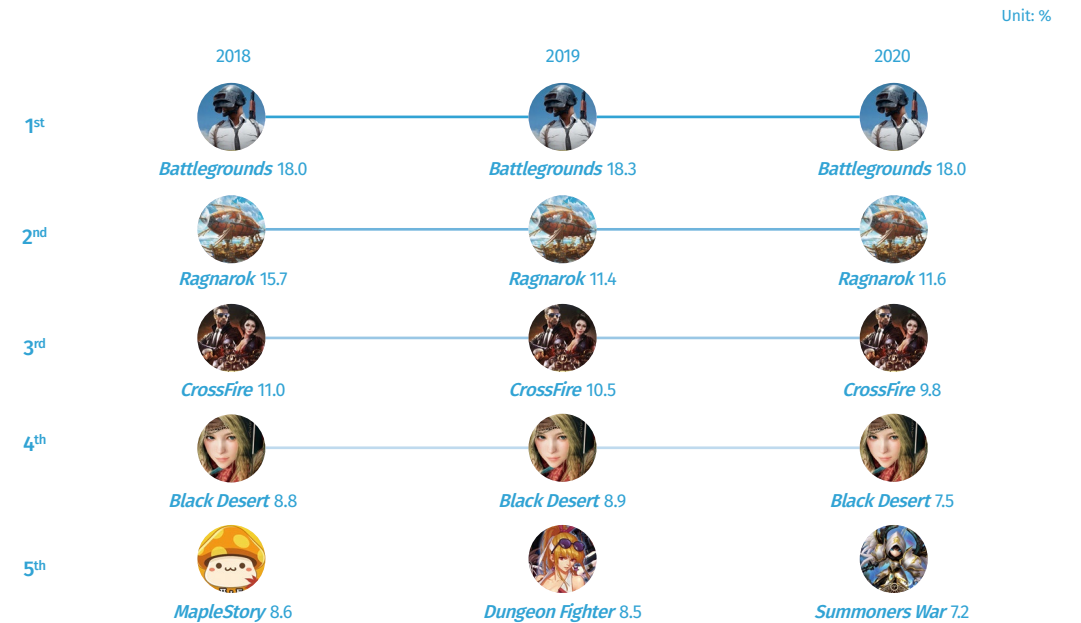
Korean games after *Battlegrounds*

As mentioned earlier, games benefited from the spread of contactless consumption due to COVID-19. In 2020, the Korean game industry recorded a substantial rise in exports (about 20%), comprising a staggering 80% of all Hallyu content exports. Thus, with their huge importance in the industry and suitability for the new content consumption paradigm, games are leading the spread of Hallyu. Nonetheless, the lack of new popular content is a cause for concern.

Battlegrounds, which topped the preference ranking for three consecutive years, is already over 5 years old, and the other titles in the rankings range from 6 to 19 years in age. Therefore, despite new sequels and versions and diversifying platforms, it is difficult to shake off the image of old titles. These trends in the game industry of upgrading versions, remaking popular content, and diversifying platforms are not limited to Korea but are a global phenomenon. Nevertheless, the fact that new content is not gaining popularity is an issue worthy of attention from a sustainability perspective.

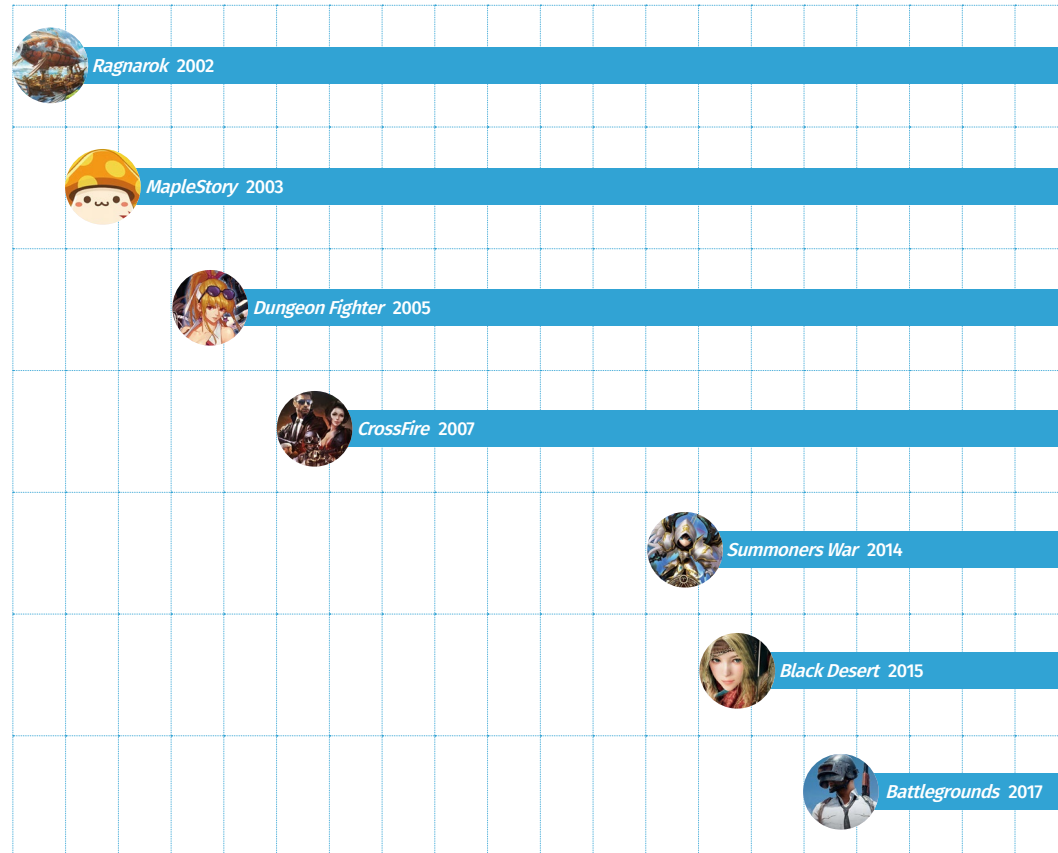
It is also worth considering encouraging the big three Korean game companies (NCsoft, Netmarble, and Nexon) to invest in small and medium-sized game studios and devising measures to promote mergers and acquisitions, as this can contribute to new content development on the premise of strengthening protection for SMEs.

Popular Korean games from 2018-2020



22-year-old Pucca carries Korean animation on her shoulders

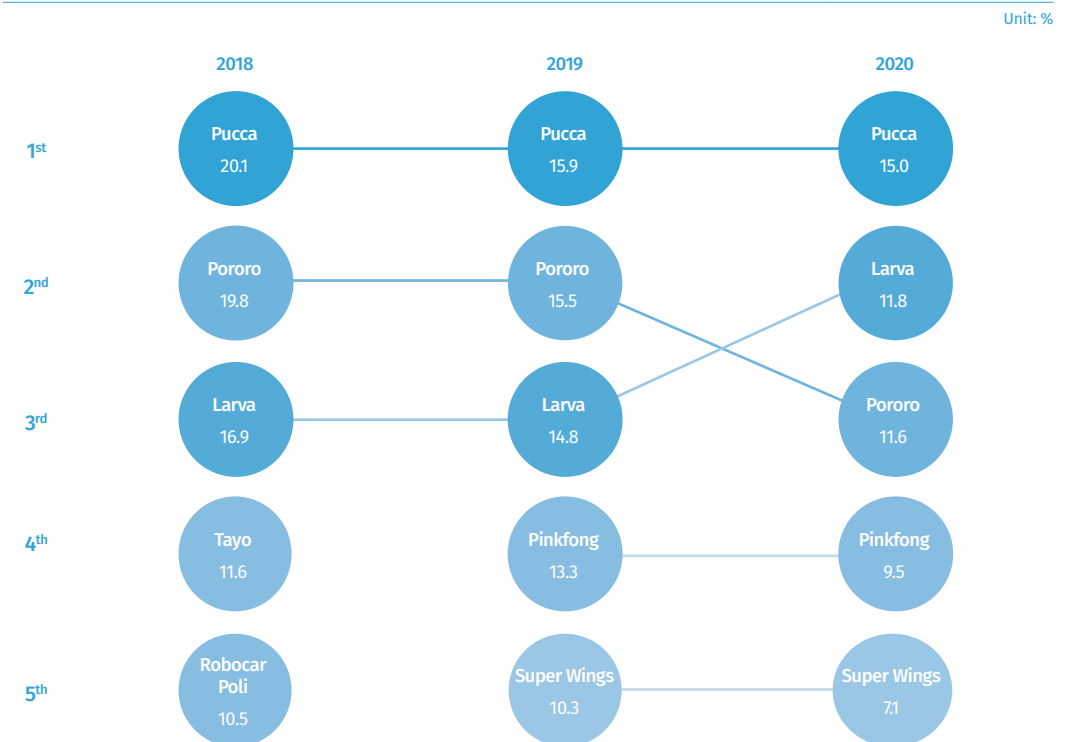
Release year of popular Korean games



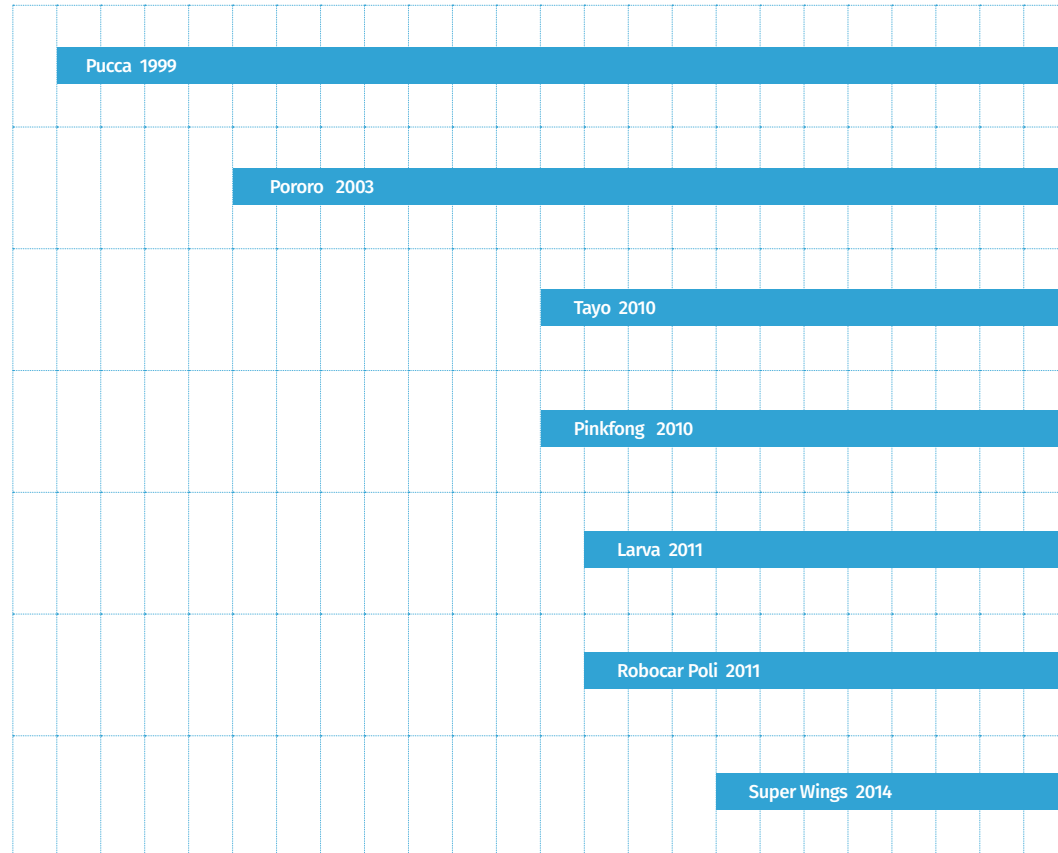
Animation, another genre benefitting from the spread of contactless consumption, showed a similar trend to games. One difference is that the character Pucca, who claimed first rank for three consecutive years, is much older than the game *Battlegrounds*. The fact that a character created in 1999 ranked first in 2020 attests to the high quality of its long-running content. From a negative viewpoint, however, this indicates that other characters released for over two decades have not surpassed Pucca's recognition abroad.

It is certainly worth noting the meteoric rises of Super Wings and Pinkfong, which kicked off the Shark Family craze and entered the 2019 rankings. Nevertheless, the fact that Pororo (created in 2003) is still one of the top characters, and that all other characters in the rankings are at least five years old, highlights the need for an overall generational replacement and measures to stimulate new content production.

Popular Korean animation characters from 2018-2020



Release year of popular Korean animation characters



Widening gap in popularization, growth, and consumption of Hallyu among countries

Deepening polarization of Hallyu’s popularization and growth

Changes in the Hallyu Index over the past three years (2018-2020), which measures the country-specific popularization and growth of Hallyu, indicates that the polarization between countries is becoming more pronounced. First, the Hallyu Status Index, which measures the popularization of Hallyu, increased from as little as 4% to as much as 13% in countries where Hallyu is most popular (Indonesia, Malaysia, Taiwan, China). On the other hand, it declined from 7% to 10% or showed little change in lower-ranking countries (UK, France, Australia, US).

The Hallyu Sentiment Index, which measures Hallyu’s growth, showed similar trends; it slightly increased in countries with normal or high growth (Indonesia, India, Turkey) but remained stagnant or dropped in declining countries (Japan, UK, France, Taiwan) or those with an index below 110. In Taiwan, where decoupling was observed between the Hallyu Status Index and Hallyu Sentiment Index, Hallyu enjoys robust popularity but the growth rate has slowed.

Hallyu Status Index by Country (2018-2020)

		2018	2019	2020	Change rate (2020-2018)
Hallyu Popularization Stage	Indonesia	3.35	3.65	3.80	13%
	Malaysia	3.44	3.58	3.71	7.8%
	Vietnam	-	3.62	3.61	-
Hallyu Expansion Stage	Taiwan	3.35	3.36	3.49	4.2%
	China	3.26	3.23	3.43	5.2%
	Thailand	3.30	3.42	3.39	2.7%
	India	3.06	3.04	3.20	4.6%
	Turkey	3.06	3.12	3.17	3.6%
	UAE	2.94	3.05	3.15	7.1%
	Brazil	2.85	3.12	2.98	4.6%
	Japan	2.86	2.82	2.88	0.7%
	Russia	2.63	2.70	2.82	7.2%
	US	2.95	2.77	2.77	-7.1%
	Argentina	-	-	2.75	-
	Australia	2.73	2.80	2.74	0.4%
	South Africa	2.52	2.54	2.69	6.7%
	France	2.66	2.76	2.68	0.8%
Minority Interest Stage	UK	2.76	2.60	2.49	-9.8%

Grouping phenomenon in Hallyu consumption: ASEAN and Greater China vs. Americas and Europe

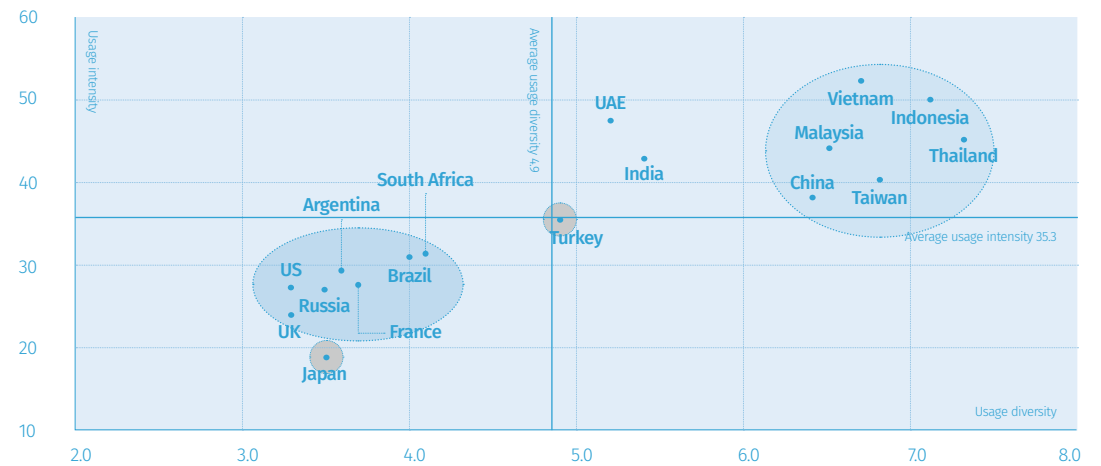
Hallyu Sentiment Index by Country (2018-2020)

		2018	2019	2020	Change rate (2020-2018)
Hallyu High Growth Group	Indonesia	133.68	141.90	135.05	1.0%
	India	132.40	137.13	133.68	1.0%
	Turkey	123.17	135.77	126.77	2.9%
Hallyu Medium Growth Group	Malaysia	133.20	127.55	124.12	-6.8%
	Thailand	129.35	136.87	124.07	-4.1%
	China	117.68	121.80	122.20	3.8%
	Vietnam	-	137.30	121.30	-
	Brazil	115.43	133.22	115.27	-0.1%
	UAE	126.44	128.00	114.63	-9.3%
	South Africa	117.06	125.25	112.21	-4.1%
	US	126.67	115.92	111.22	-12.2%
	Australia	113.85	115.17	111.04	-2.5%
	Russia	136.19	119.71	110.06	-19.2%
	Argentina	-	-	109.62	-
	Taiwan	119.95	115.92	108.02	-9.9%
	France	118.33	115.02	107.97	-8.8%
	UK	118.52	115.18	106.12	-10.5%
Hallyu Declining Group	Japan	94.25	88.72	94.37	0.1%

The distribution of usage intensity and usage diversity—country-specific indicators of Hallyu consumption—indicates a grouping phenomenon between specific regions. ASEAN and Greater China, where Hallyu was steadily popularized and is actively consumed, showed high usage intensity and usage diversity, thus forming one group. Conversely, the Americas and Europe, where Hallyu is much less popularized and consumed compared to the other two regions, formed a distinct opposing group.

Turkey's usage diversity and usage intensity were both close to the overall average, and it was the only European country to deviate from the second group. This is likely a reflection of Turkey's characteristically hybrid culture, which combines Eastern and Western cultures (Lee, 2013).¹ Japan recorded the lowest indicators not only in Asia but among all countries, clearly displaying the Galapagos effect in which local consumers strongly prefer their own country's culture. This phenomenon is enabled by Japan's massive domestic market (Shin, 2020).²

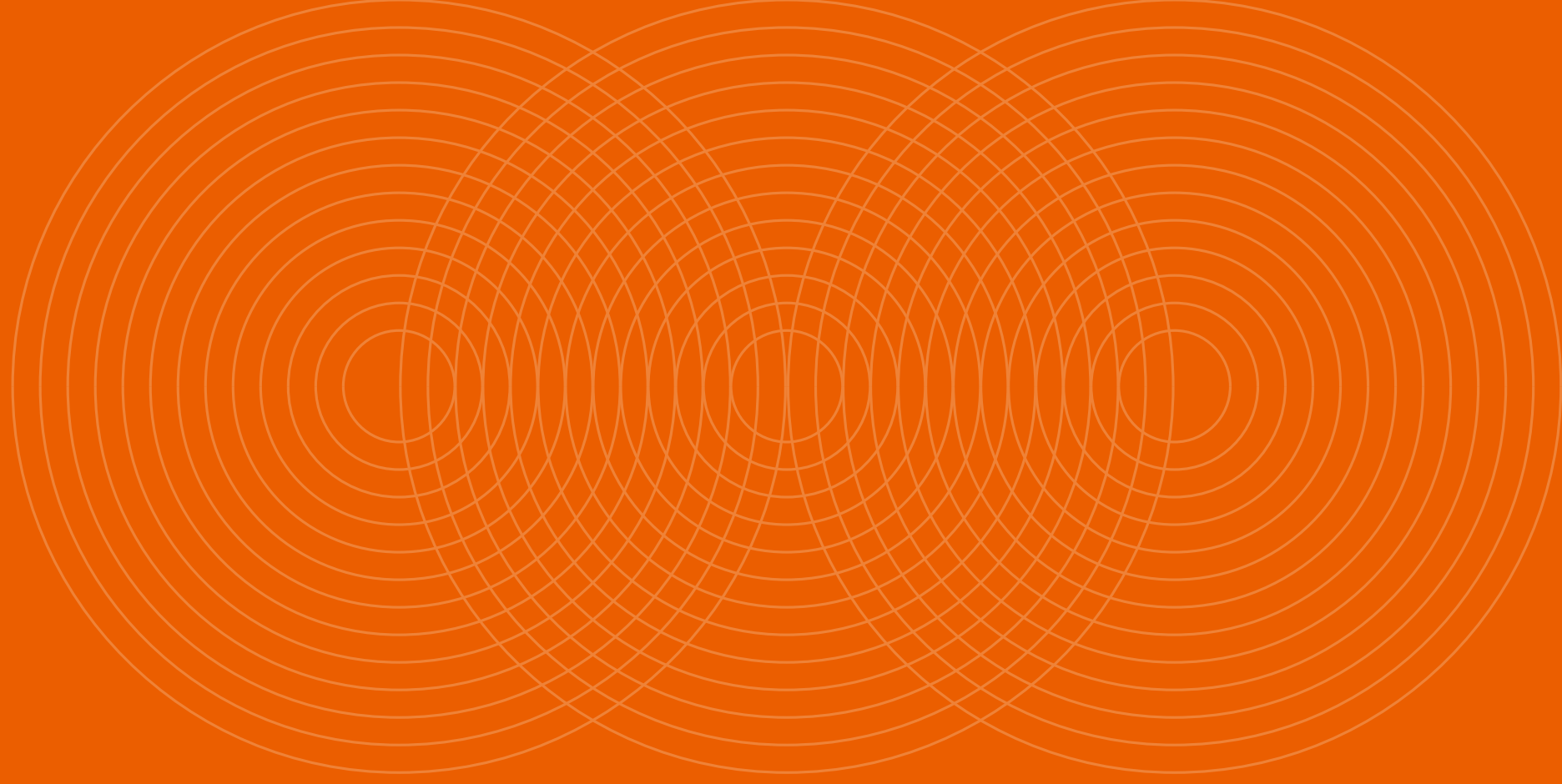
Distribution of Hallyu usage expansion indicators by country



¹ Lee, N. A. (2013). A Review on Turkish Cultural Codes. *Global Cultural Contents*, No. 10, pp. 21-50

² Shin, Y. J. (2020, November 21). Japanese "sense of crisis" to Hallyu in SEA...Why are they crazy for BLACKPINK?, *Maeil Business Newspaper*

Analysis of Hallyu Trends by Region and Country



Perception of Hallyu (Korea)

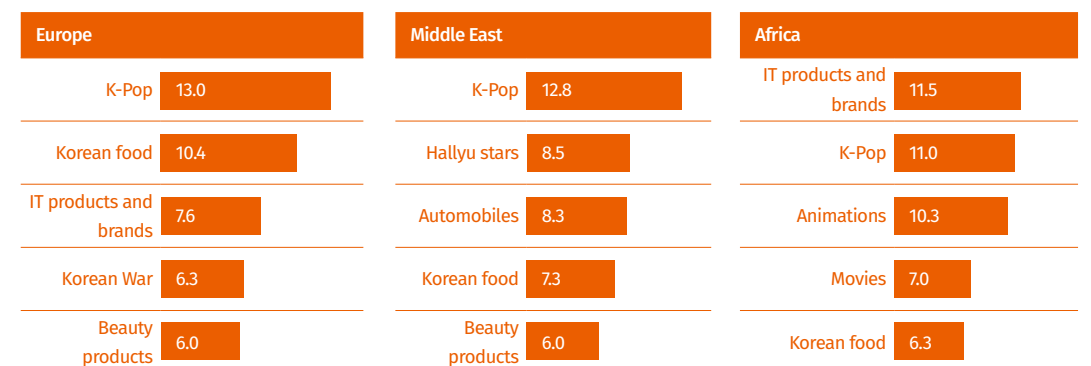
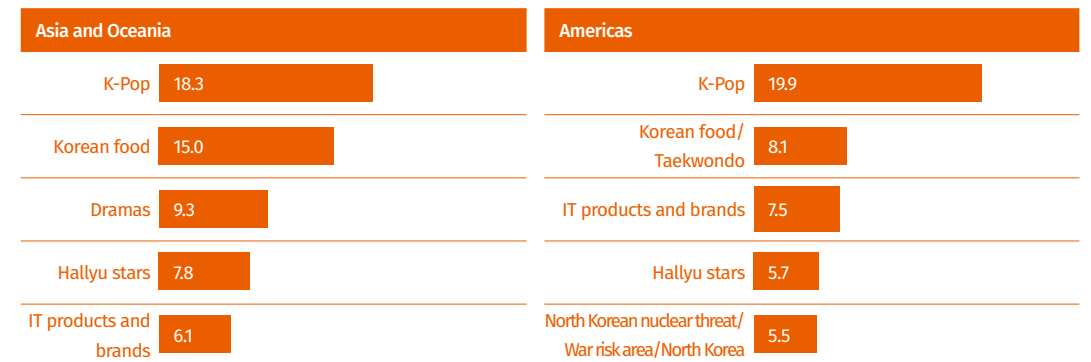
Images associated with Korea

Five Regions

In all regions except Africa, the image most frequently associated with Korea was K-Pop. K-Pop, which has maintained the top spot for four consecutive years since 2017, declined by 1.7%p from the 2019 survey and the number of regions where it ranked first dropped from five to four. Nevertheless, its influence still seems to be substantial. The association rate of K-Pop with Korea decreased in all regions; this was particularly so in the Americas, which showed a comparatively large decline of 5%p.

One of the images most frequently associated with Korea was Korean food, showing similar results to the 2019 survey. It ranked second in Asia and Oceania, the Americas, and Europe, fourth in the Middle East, and fifth in Africa. It increased by 2.8%p in Europe, a trend distinct from other regions. IT products and brands showed high association rates in all regions except the Middle East. Notably, Africa was the only region where they ranked first at a double-digit response rate, surpassing even K-Pop.

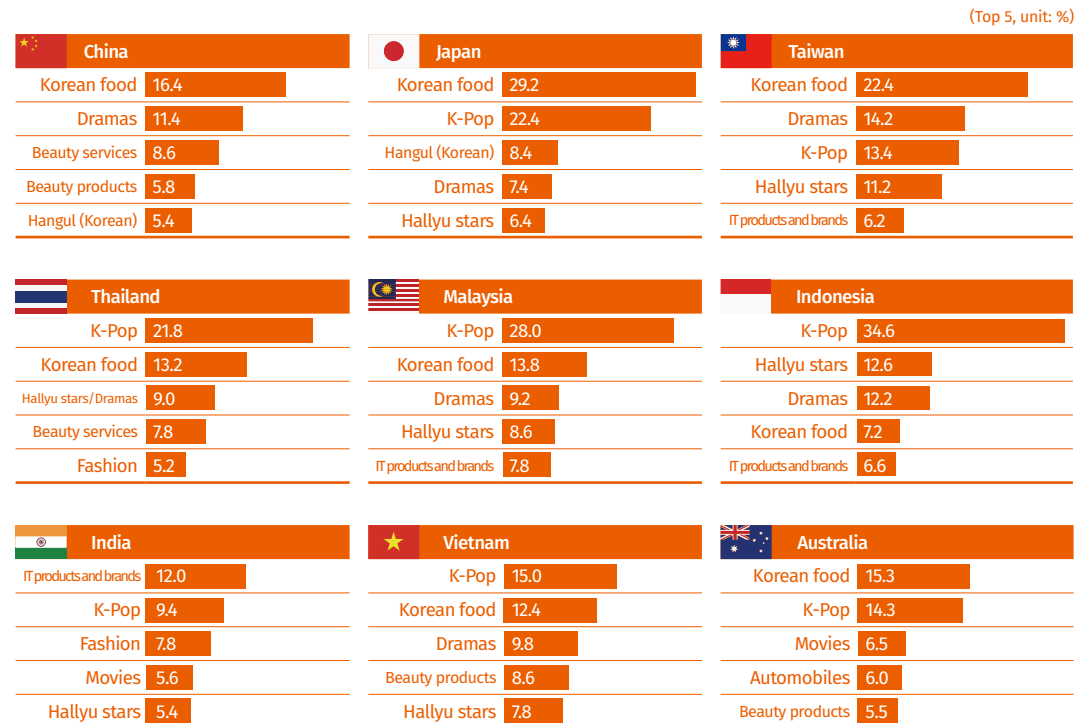
(Top 5, unit: %)



Asia and Oceania

In Asia and Oceania, the image most frequently associated with Korea was K-Pop, followed by Korean food, dramas, Hallyu stars, and IT products and brands. As in the 2019 survey, K-Pop and Korean food ranked first in four countries, showing a clear divide among the top-ranking associated images. K-Pop claimed first place in Thailand, Malaysia, Indonesia, and Vietnam, and Korean food topped the ranking in China, Japan, Taiwan, and Australia. Particularly in Japan, the response rate for Korean food nearly reached 30% and rose for the fourth consecutive year, confirming the steady growth of Korean food in Japan.

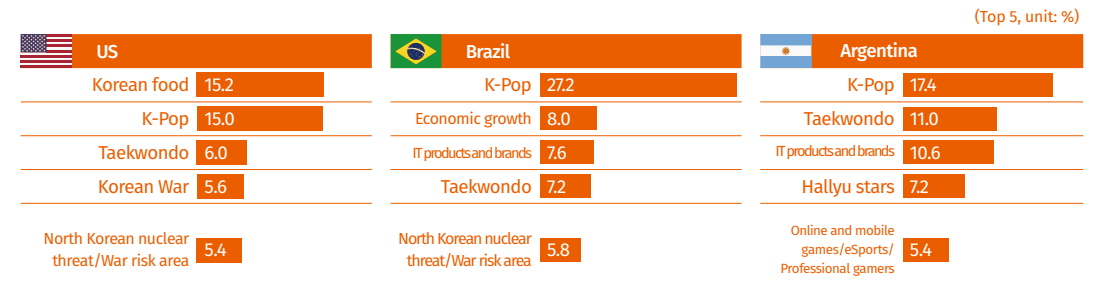
As in the past four years, India was the only country where IT products and brands recorded the highest association rate, though it slightly declined (2.6%p) from 2019. Meanwhile, excluding Australia, dramas and Hallyu stars also showed high association rates in most Asian and Oceania countries.



Americas

As in 2019, the most frequently associated image in the Americas was K-Pop. By country, in the US, the response rate for K-Pop decreased by 4%p from 2019, while Korean food claimed the top spot, and in Brazil, the response rate for K-Pop decreased by 3.6%p from 2019, though it maintained first place with a high result. In Argentina, which was included for the first time in this survey, K-Pop ranked first with a response rate of 17.4%, indicating an awareness of K-Pop somewhere between that of the US and Brazil.

Meanwhile, the response rate for Taekwondo more than doubled compared with 2019 in the US and Brazil, ranking third and fourth, respectively. In Argentina, Taekwondo ranked second after K-Pop with a high association rate of 11.0%, indicating the high awareness of Taekwondo in the Americas.

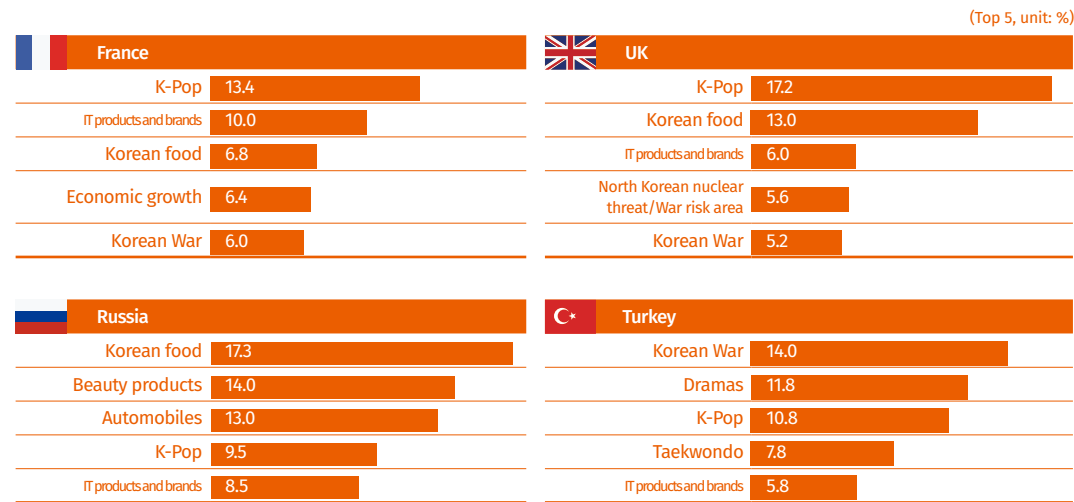


Europe

In Europe, K-Pop, Korean food, and IT products and brands were the images most associated in each country, and Korea-related political, social, and historical issues were included in the responses more than other regions. In France and the UK, K-Pop ranked first, as in the 2019 survey. However, the association rate of K-Pop in France has been declining every year since 2017, and in this survey it dropped by 2.2%p from 2019.

In contrast, the association rate of IT products and brands increased by 2.1%p and climbed from third in 2019 to second place in 2020. IT products and brands ranked third in the UK and fifth in Russia

and Turkey, indicating high awareness about them throughout Europe. In Russia, beauty products and automobiles ranked second and third, respectively, displaying a different trend from the top rankings in other countries. Meanwhile, the Korean War ranked first in Turkey, as in the 2019 survey, suggesting that the image of Korea as a military ally is still strong in Turkey.



Middle East and Africa

In the UAE, despite a slight decline by 1.5%p, K-Pop ranked first for the fourth consecutive year, followed by Hallyu stars, automobiles, Korean food, and beauty products. Hence, the image of Korean consumer goods was stronger than in other regions.

In South Africa, IT products and brands overtook K-Pop by a narrow margin, which had ranked first for two years in a row until 2019. These were followed by animations, movies, and Korean food. It is notable that animations ranked among the top images, in contrast with other regions.

Negative perceptions of Hallyu content and their causes

Five Regions

The rate of negative perceptions toward Hallyu content averaged 24.4% across 18 countries, a slight decline from 28.1% in 2018 and 26.6% in 2019. By region, though Asia and Oceania showed a decreasing rate of negative perceptions for three consecutive years from 2017 to 2019, it slightly increased in 2020 (0.7%p). The Americas showed a large decline (10.9%p). Europe also showed a decrease compared with 2019, and the Middle East (up 1.8%p) and Africa (down 1.0%p) showed slight changes.

The causes of negative perceptions toward Hallyu content were similar to those observed in the 2019 survey results. The excessive commercial and provocative nature of Hallyu and the need to protect the content industry of one's own country were the most common reasons in most regions, while the inappropriate behavior of Hallyu stars and influencers was also a common reason in the Americas and Africa.

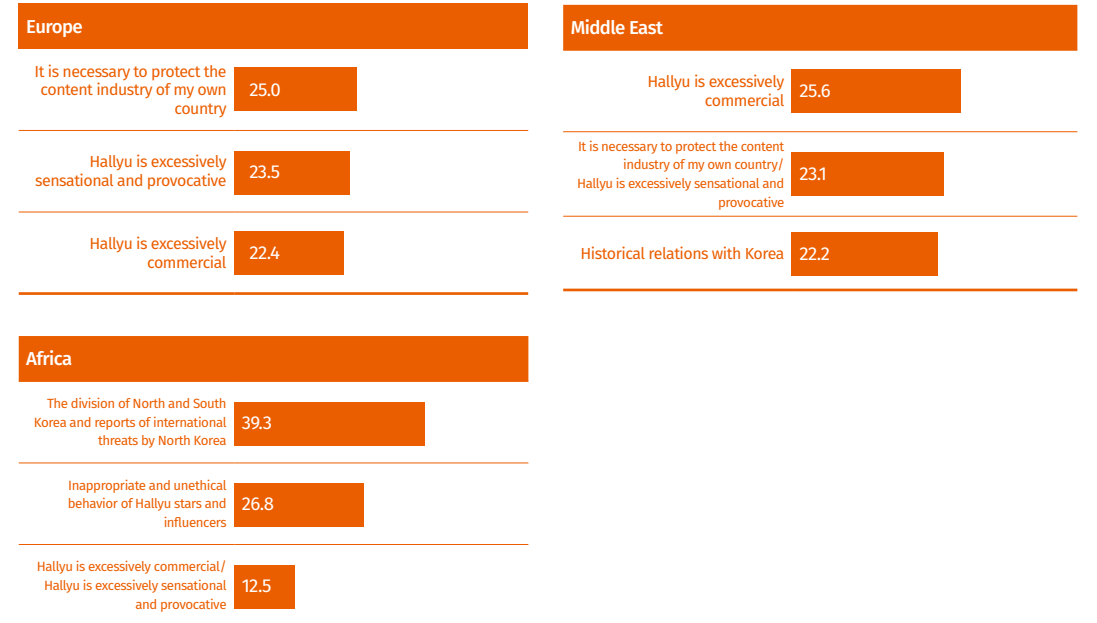
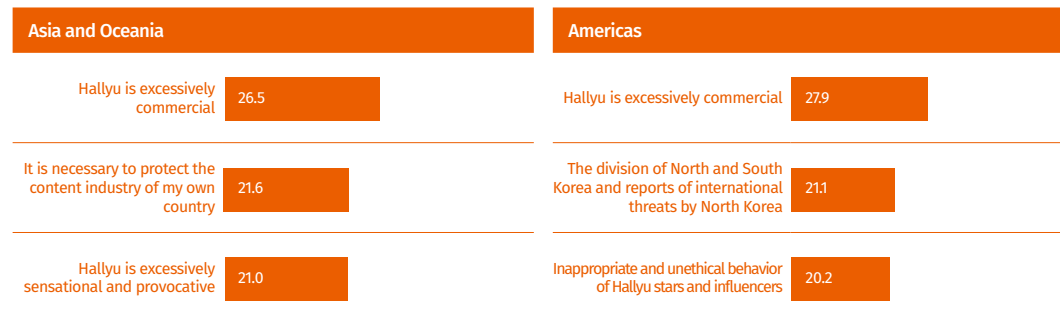
Negative perceptions toward Hallyu

(unit: %)

	Asia and Oceania	Americas	Europe	Middle East	Africa
2018	30.6	33.4	21.7	23.3	24.3
2019	29.2	27.4	22.1	27.5	15.0
2020	29.9	16.5	18.9	29.3	14.0

Reasons for negative perceptions toward Hallyu

(Top 3, unit: %)



Asia and Oceania

Regarding Asia and Oceania, China (38.8%), Japan (33.2%), India (37.2%), and Vietnam (35.4%) showed higher rates of negative perceptions than the regional average (29.9%), whereas Taiwan (17.8%), Thailand (29.6%), Malaysia (22.4%), Indonesia (27.2%), and Australia (27.3%) showed lower rates than the average.

In China and Japan in particular, negative perceptions have risen every year since 2018, which is attributed to political, diplomatic, and historical issues with Korea rather than Hallyu content's characteristics themselves. Political and diplomatic conflicts ranked third in China and first in Japan as the reason for negative perceptions. In Japan, this was followed by Korea's poor national character and historical relations with Korea, demonstrating that attributes unrelated to content are negatively impacting the perception of Hallyu. Meanwhile, the division of North and South Korea and reports of international threats by North Korea ranked highly in Malaysia, Indonesia, India, and Australia, showing that factors related to North Korea also have an adverse effect on Hallyu acceptance.

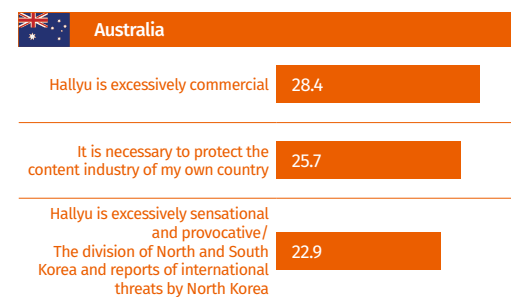
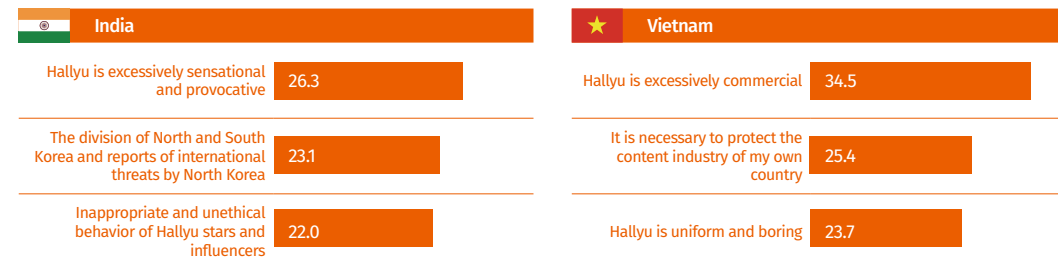
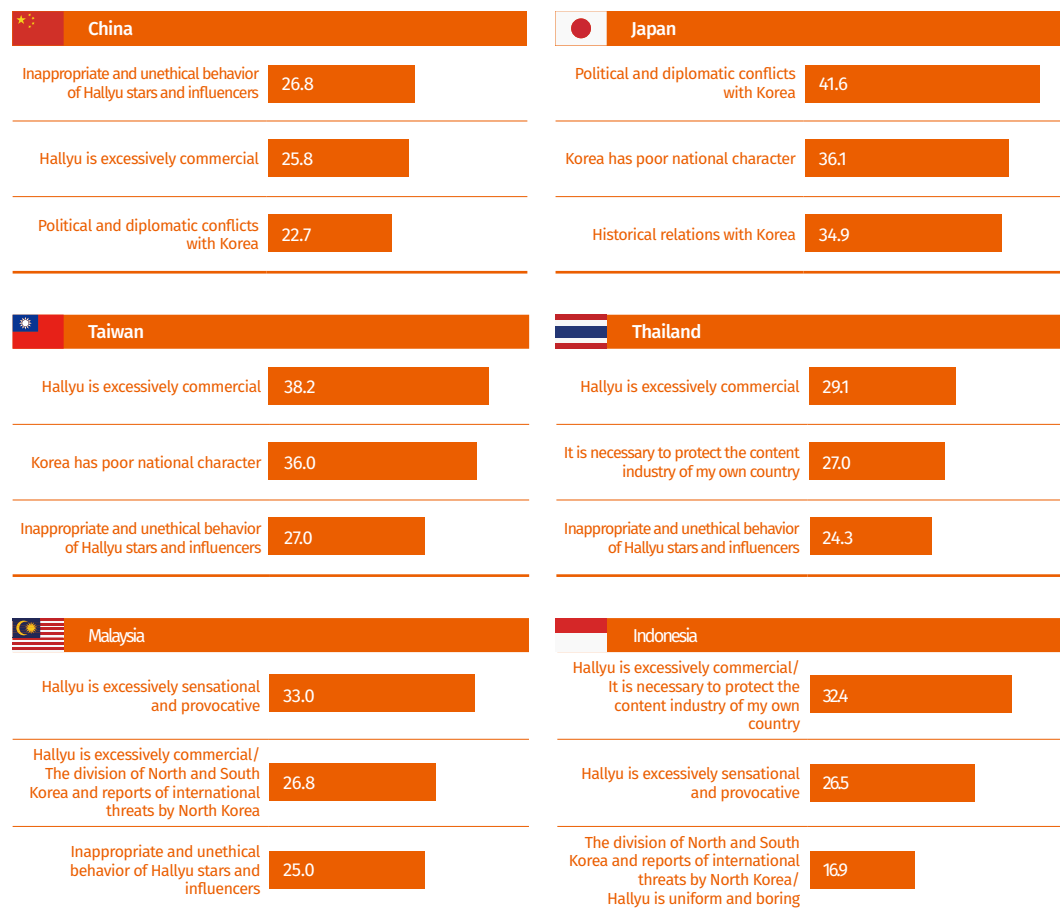
Negative perceptions toward Hallyu

(unit: %)

	China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Australia
2018	25.6	29.8	27.2	37.6	32.2	26	41.2	-	24.0
2019	31.4	31.4	31.2	19.6	37.4	24.6	27.0	21.8	34.2
2020	38.8	33.2	17.8	29.6	22.4	27.2	37.2	35.4	27.3

Reasons for negative perceptions toward Hallyu

(Top 3, unit: %)



Americas

In the Americas, negative perceptions of Hallyu have steadily declined for the past three years. The rate was 16.5% in 2020, nearly half of the 33.4% in 2018. The response rate declined by 74%p in the US and by nearly 10%p in Brazil from 2019.

Argentina's response rate of 11.4%, which is lower than those of the US and Brazil, suggests that overall perceptions of Hallyu there are positive.

Regarding the causes of negative perceptions toward Hallyu, the content's excessive commercial nature was the most common reason in all three countries, while its sensational and provocative nature and news related to North Korea were frequent reasons in two countries. Meanwhile, the inappropriate and unethical behavior of Hallyu stars was the most common reason for US respondents, unlike Brazil and Argentina. Thus, not only the positive but also the negative influence of stars is greater in the US than in other countries.

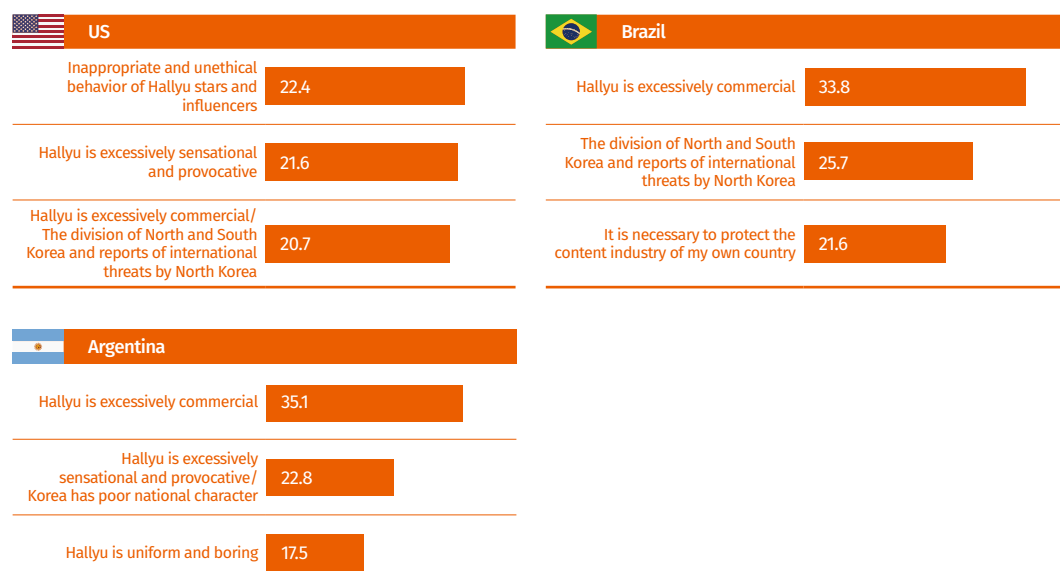
Negative perceptions toward Hallyu

(unit: %)

	US	Brazil	Argentina
2018	35.8	31	-
2019	30.6	24.2	-
2020	23.2	14.8	11.4

Reasons for negative perceptions toward Hallyu

(Top 3, unit: %)



Europe

In Europe, the rate of negative perceptions toward Hallyu was 18.9%, a slight drop of 3.2%p from 2019 and below the overall average of 24.4%. In France and the UK, the rate has steadily decreased for the third year in a row since 2018; the UK, in particular, recorded a decline of 10.4%p from 2018, indicating a substantial reduction in negative perceptions toward Hallyu. On the other hand, while Russia and Turkey recorded increases in negative perception rates in 2019, they decreased again in 2020.

The need to protect the content industry of one's own country was the most frequent reason in France, Turkey, and Russia, whereas the excessive sensational and provocative nature of the content was the top reason in the UK. The content being excessively commercialized was also a common reason in France, the UK, and Turkey, indicating its adverse impact on perceptions toward Hallyu.

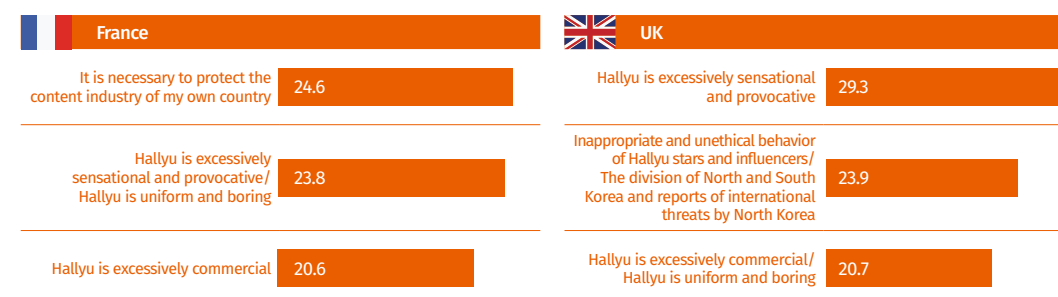
Negative perceptions toward Hallyu

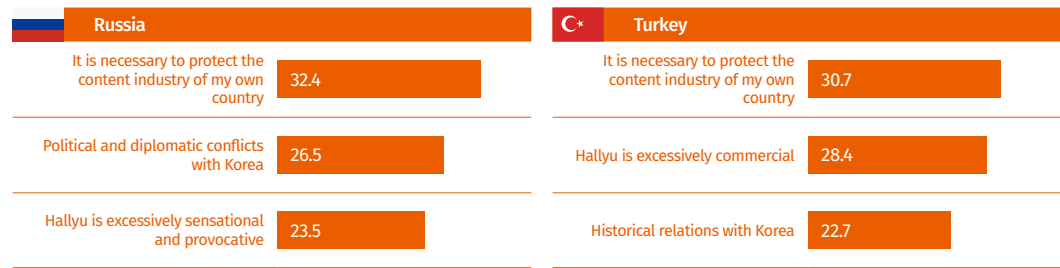
(unit: %)

	France	UK	Russia	Turkey
2018	28	28.8	5.8	21
2019	27.8	21.8	11.5	25.8
2020	25.2	18.4	8.5	22.0

Reasons for negative perceptions toward Hallyu

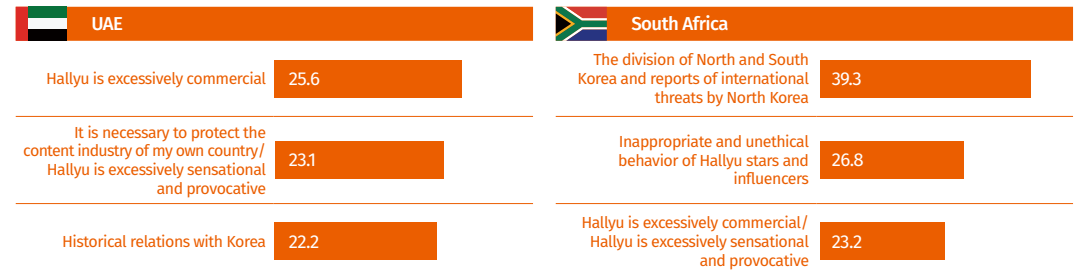
(Top 3, unit: %)





Reasons for negative perceptions toward Hallyu

(Top 3, unit: %)



Middle East and Africa

The rate of negative perceptions toward Hallyu rose for three consecutive years in the Middle East, reaching 29.3% in 2020. In contrast, Africa recorded a low rate of 14.0%, which continued to decline in 2020.

In both regions, the excessive commercial, sensational, and provocative nature of Hallyu content was the prominent reason; however, the need to protect the content industry of one's own country and historical relations with Korea had a greater impact in the Middle East. Reports related to North Korea and the inappropriate behavior of Hallyu stars showed a large influence in Africa, a significant difference from other regions.

Negative perceptions toward Hallyu

(unit: %)

	UAE	South Africa
2018	23.3	24.3
2019	27.5	15.0
2020	29.3	14.0

Changes in perception of Korea after experiencing Hallyu content

Five Regions

(Unit: %, points)

Year	Influence	Asia and Oceania	Americas	Europe	Middle East	Africa
2018	Negative	6.6	2.4	2.7	4.3	2.5
	No change	32.8	29.7	37.3	22.0	32.0
	Positive	60.5	67.9	59.9	73.8	65.5
	5-point scale	3.68	3.96	3.73	3.92	3.80
2019	Negative	5.5	3.7	3.1	4.8	1.3
	No change	32.3	32.1	40.2	26.3	25.0
	Positive	62.1	64.2	56.7	69.0	73.8
	5-point scale	3.74	3.86	3.66	3.84	3.90
2020	Negative	6.4	12.1	10.4	7.5	5.8
	No change	30.6	38.5	43.8	39.3	37.3
	Positive	63.1	49.4	45.8	53.3	57.0
	5-point scale	3.74	3.48	3.45	3.62	3.68

Regarding changes in perceptions of Korea after experiencing Hallyu content, Asia and Oceania recorded the largest positive change rate, followed by Africa, the Middle East, the Americas, and Europe. Overall, excluding Asia and Oceania, the positive change rate declined compared with 2018, showing a trend similar to the 2019 survey results. The Americas, which recorded the largest positive change rate in 2018, showed the greatest decline in the positive change rate in 2020 at nearly 20%p. Meanwhile, although Asia and Oceania had the highest positive change rate, the increase (2.6%p) was small compared with 2018.

Asia and Oceania

(Unit: %, points)

Year	Influence	China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Australia
2018	Negative	18.2	16.8	5.0	2.4	2.4	3.6	2.0	-	1.8
	No change	35.4	57.0	45.6	20.8	21.2	24.6	14.0	-	46.8
	Positive	46.4	26.2	49.4	76.8	76.4	71.8	84.0	-	51.5
	5-point scale	3.34	3.05	3.51	3.91	3.93	3.98	4.12	-	3.62
2019	Negative	12.6	16.2	5.6	2.2	2.4	1.8	2.6	2.0	4.3
	No change	34.0	61.8	42.6	24.2	28.6	21.2	15.2	17.6	49.3
	Positive	53.4	22.0	51.8	73.6	69.0	77.0	82.2	80.4	46.5
	5-point scale	3.53	3.01	3.54	3.92	3.84	4.10	4.11	4.1	3.53
2020	Negative	3.2	19.8	3.2	4.4	6.0	3.2	3.0	5.0	10.3
	No change	24.2	46.2	39.0	28.2	27.8	17.8	27.4	24.8	42.0
	Positive	72.6	34.0	57.8	67.4	66.2	79.0	69.6	70.2	47.8
	5-point scale	3.86	3.11	3.64	3.88	3.78	4.04	3.99	3.85	3.49

Within Asia and Oceania, Indonesian consumers showed the most positive change after experiencing Hallyu content. Indonesia recorded positive and negative change rates of 79.0% and 3.2%, and a high score of 4.04 on a 5-point scale. This is the highest and the only 4-point score not only in Asia and Oceania but among all 18 surveyed countries, indicating the enormous positive influence of Hallyu content in Indonesia.

Conversely, although the positive change rate of Japanese consumers increased compared with 2018 and 2019 (up 12%p from 2019), Japan still recorded the lowest rate among all surveyed countries at 3.11 on a 5-point scale. The majority of respondents who had consumed Hallyu content reported no change in their perception of Korea (46.2%), while 34% reported a positive change and 19.8% a negative change.

Americas

(Unit: %, points)

Year	Influence	US	Brazil	Argentina
2018	Negative	1.4	3.4	-
	No change	37.8	21.6	-
	Positive	60.8	75.0	-
	5-point scale	3.9	4.1	-
2019	Negative	5.2	2.2	-
	No change	45.0	19.2	-
	Positive	49.8	78.6	-
	5-point scale	3.6	4.1	-
2020	Negative	11.8	12.2	12.4
	No change	45.2	30.8	39.4
	Positive	43.0	57.0	48.2
	5-point scale	3.39	3.62	3.42

The rate of positive change in the perception of Korea after experiencing Hallyu content has steadily declined for three years in the US and Brazil. In the US, the positive change rate dropped by about 20%p from 60.8% in 2018 to 43.0% in 2020, a sizeable decline of about 0.5 on a 5-point scale. Similarly, in Brazil, the positive change rate dropped by 18.0%p from 2018, a decrease of about 0.5 on a 5-point scale.

Argentina recorded a 48.2% positive change rate, 39.4% no change rate, and 12.4% negative change rate, which corresponds to 3.42 on a 5-point scale, placing it between the US and Brazil.

Europe

(Unit: %, points)

Year	Influence	France	UK	Russia	Turkey
2018	Negative	4.6	1.8	1.5	2.8
	No change	41.2	47.0	41.5	16.3
	Positive	54.2	51.2	57.0	81.0
	5-point scale	3.6	3.6	3.6	4.1
2019	Negative	4.6	2.0	2.5	3.3
	No change	45.8	47.0	43.8	21.0
	Positive	49.6	51.0	53.8	75.8
	5-point scale	3.5	3.6	3.6	4.0
2020	Negative	14.0	8.4	14.0	5.0
	No change	42.2	54.2	45.3	31.3
	Positive	43.8	37.4	40.8	63.8
	5-point scale	3.37	3.33	3.33	3.83

In all four European countries, the positive change rate declined from 2018 and 2019. France, the UK, and Russia recorded positive change rates of 50-60% in 2018 but around 40% in 2020, and their scores on a 5-point scale declined from 3.6 to around 3.3. Russia's positive change rate in particular dropped by about 16%p from 2018, a relatively large decline among these three countries.

Turkey recorded the highest positive change rate in Europe; that is, 64% of Turkish respondents reported that their perception of Korea improved after experiencing Hallyu content. While this is lower than the positive change rate of 81.0% in 2018, it is still relatively high compared with other European countries. In addition, Turkey scored 4.0 or more on a 5-point scale up until 2019 and then slightly dropped to 3.83 in 2020.

Middle East and Africa

(Unit: %, points)

Year	Influence	UAE	South Africa
2018	Negative	4.3	2.5
	No change	22.0	32.0
	Positive	73.8	65.5
	5-point scale	3.9	3.8
2019	Negative	4.8	1.3
	No change	26.3	25.0
	Positive	69.0	73.8
	5-point scale	3.8	3.9
2020	Negative	7.5	5.8
	No change	39.3	37.3
	Positive	53.3	57.0
	5-point scale	3.62	3.68

In the Middle East and Africa, respondents' rate of positive change in perception after experiencing Hallyu content decreased. The UAE scored 3.9 on a 5-point scale in 2018, which declined to 3.8 in 2019 and further to 3.62 in 2020. From 2018 to 2019, the positive change rate decreased by 4.8%p and the negative change rate increased by 0.5%p, while in 2020 the positive change rate decreased by 15.7%p and the negative change rate increased by 2.7%p. Hence, the decline in the positive change rate was even greater from 2019 to 2020.

South Africa recorded similar results to the UAE, though the trend differed slightly. It scored 3.8 on a 5-point scale in 2018, which rose slightly to 3.9 in 2019 and then dropped to 3.68 in 2020.

The positive change rate increased from 65.5% in 2018 to approximately 74% in 2019 but plunged to 57% in 2020. Meanwhile, the negative change rate declined from 2.5% in 2018 to 1.3% in 2019 but more than quadrupled to 5.8% in 2020.

Consumption of Hallyu

Consumption Behavior of Hallyu users

Asia and Oceania

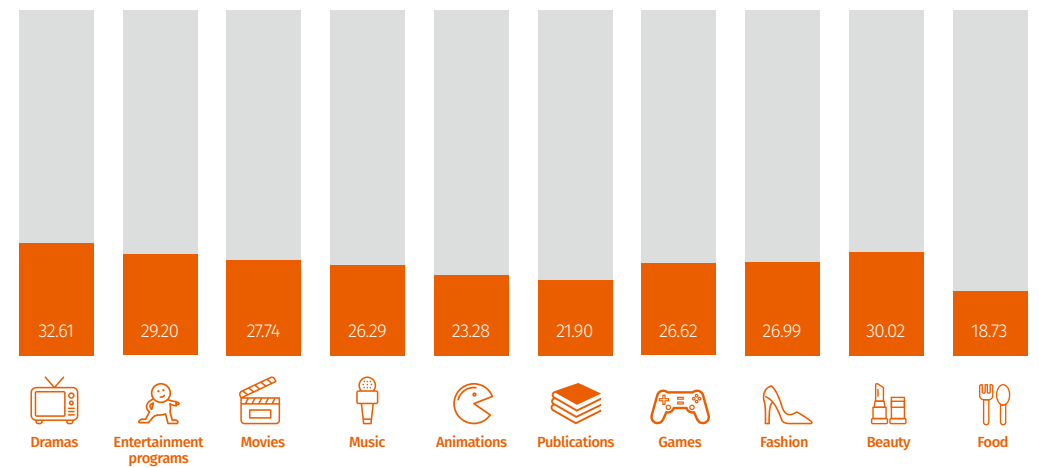
In Asia and Oceania, consumption of Hallyu content accounted for 24.55% of all cultural content consumption. Dramas (32.6%) were consumed the most, followed by beauty, entertainment programs, movies, fashion, and games, indicating active overall consumption of Korean video content and lifestyle products.

Meanwhile, online and mobile platforms were the most common channels to access Korean dramas in Asia and Oceania, followed by entertainment programs, movies, music, and animations. This is a marked difference from the 2019 survey, where most respondents still watched dramas on TV. Thus, the diffusion of new media channels for video content, such as OTT services, also took place in Asia and Oceania. Nevertheless, across all categories, 60% to 76% of respondents accessed content via TV, indicating the coexistence of new and traditional media.

The respondents primarily accessed content related to Korean fashion, beauty, and food through videos and photos on social media, which was accompanied by access through Korean video content. The respondents used local websites to access publications 11% more often than global websites, and they mostly played games online and via mobile platforms directly.

Consumption of Hallyu Content

(Unit: %)



Access Channels to Hallyu Content

(Multiple response, unit: %)



Americas

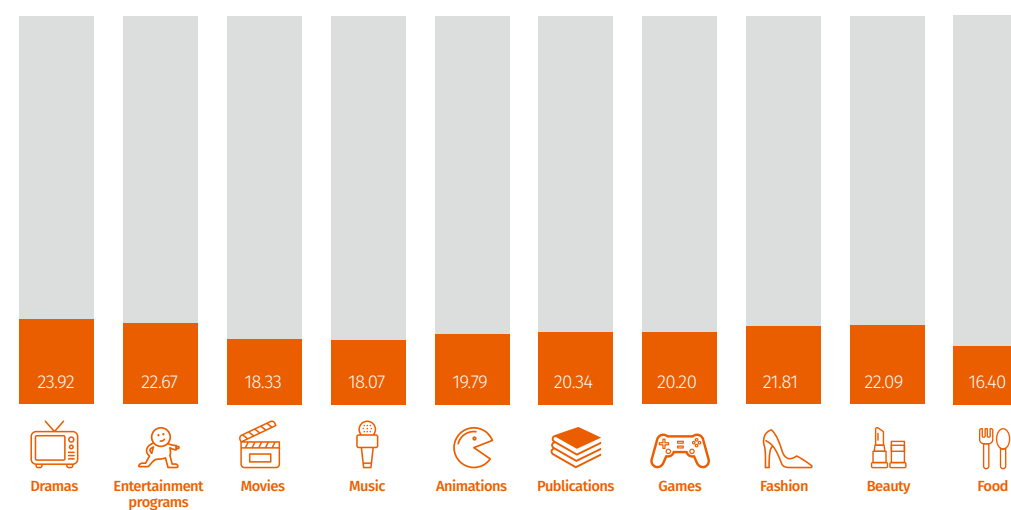
In the Americas, consumption of Hallyu content accounted for 17.11% of all cultural content consumption. Dramas (23.92%) were consumed the most, followed by entertainment programs, beauty, fashion, publications, and games. Among the surveyed regions, the Americas recorded the second-lowest share of Hallyu content consumption.

Meanwhile, respondents in the Americas also mainly accessed Korean video and music content through online and mobile platforms. Around 80% of the users accessed Korean dramas, entertainment programs, movies, and music through online and mobile platforms, while 35% to 55% accessed them on TV. Notably, over 80% of the respondents accessed K-Pop and animations via online and mobile platforms, exceeding the percentage in 2019.

Videos and photos on Social media were the most common channel to access content related to Korean fashion, beauty, and food. Many users also watched YouTube videos by individuals (beauty, food) and Korean video content (fashion) to access it. Most respondents directly played Korean games on online and mobile platforms, while publications were mostly accessed through global and local sites.

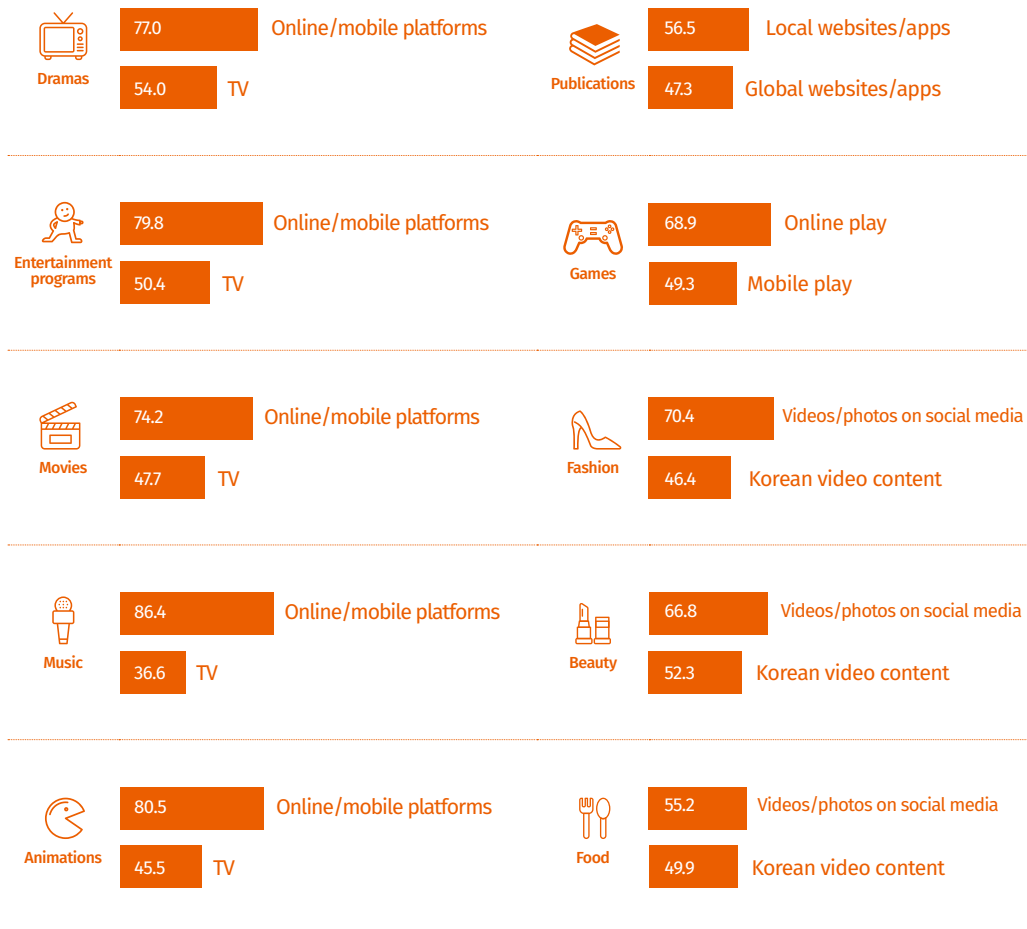
Consumption of Hallyu Content

(Unit: %)



Access Channels to Hallyu Content

(Multiple response, unit: %)



Europe

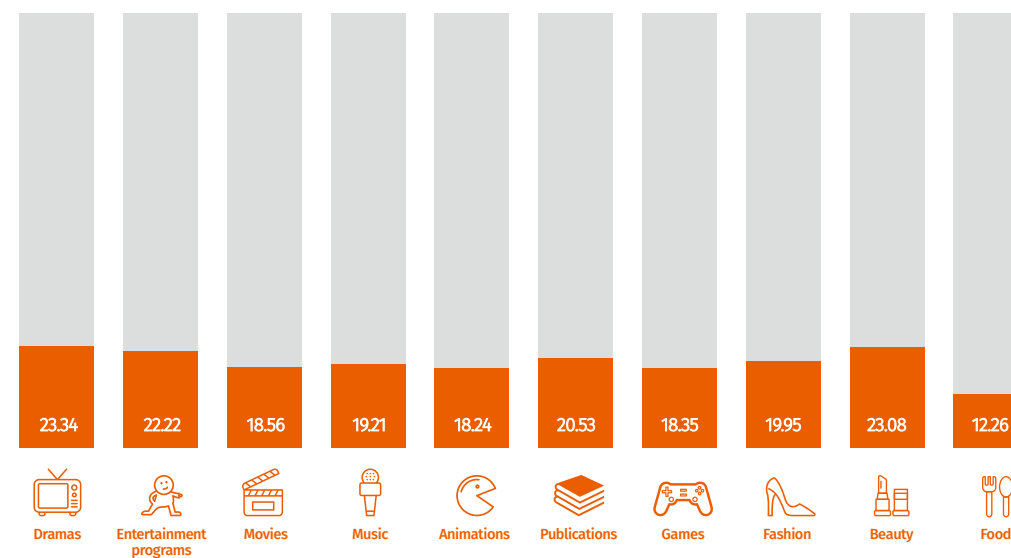
In Europe, consumption of Hallyu content accounted for 16.68% of all cultural content consumption, and like the Americas, consumption of dramas (23.34%) was the highest. The shares of consumption in Europe ranged from 12% to 23%, the lowest among the five regions.

In terms of access channels, like the other regions, most Europeans accessed Korean video and music content via online and mobile platforms; over 70% of the respondents used online and mobile platforms to consume dramas, entertainment programs, animations, and music, with only movies recording a share of online viewership below 70%. Access via TV, the second-highest channel of access, was also frequent, though the difference with online and mobile platforms was quite large at 20% to 40% depending on the category.

Videos and photos on social media were the most common channel to access content related to Korean fashion, beauty, and food. Many users also watched YouTube videos by individuals (beauty, food) and Korean video content (fashion). Most users directly played games online and on mobile platforms, while publications were mostly accessed through local and global sites.

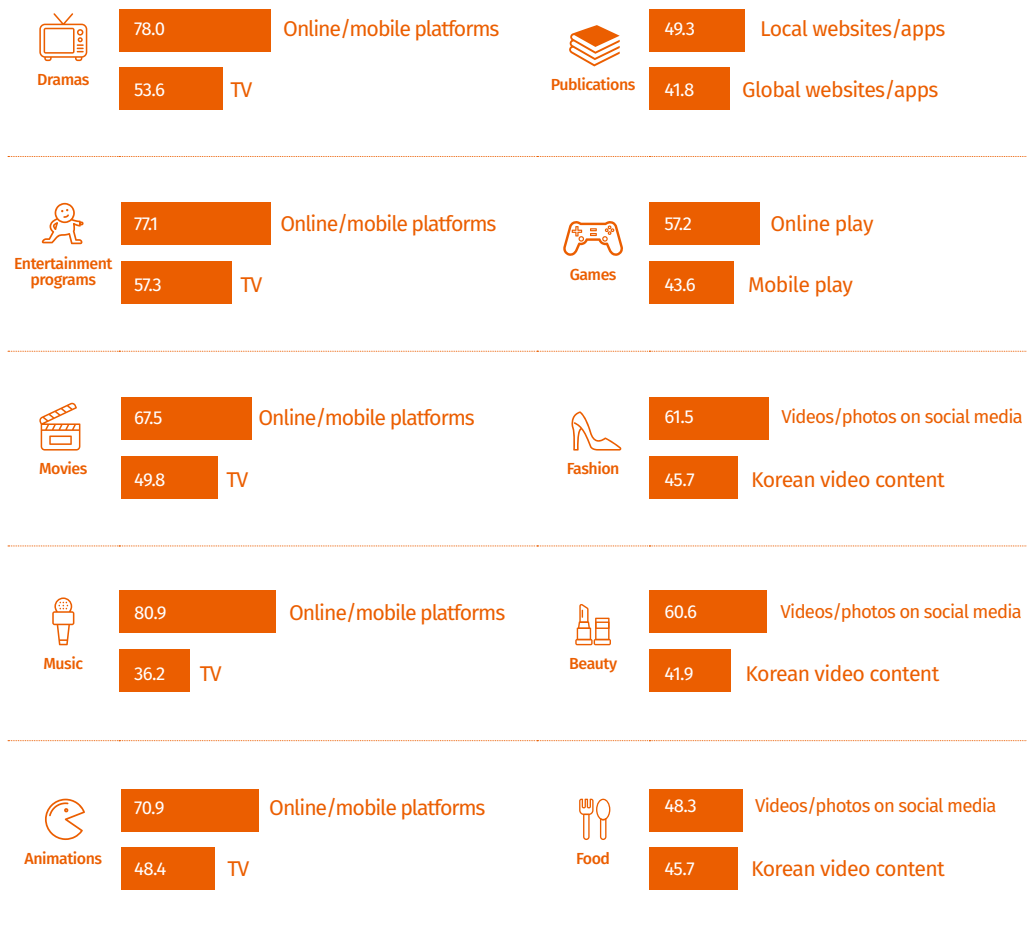
Consumption of Hallyu Content

(Unit: %)



Access Channels to Hallyu Content

(Multiple response, unit: %)



Middle East

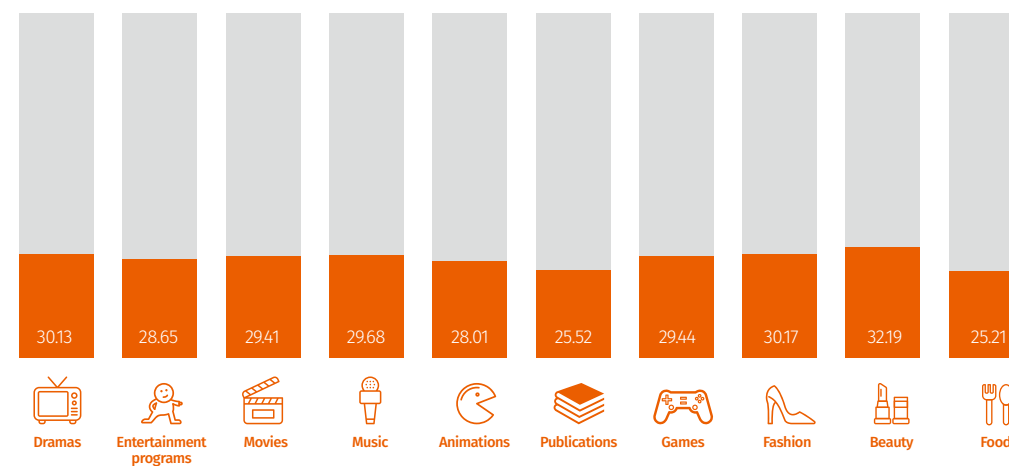
In the Middle East, consumption of Hallyu content accounted for 27.74% of all cultural content consumption. Beauty (32.19%) was consumed the most, followed by Korean fashion (30.17%) and dramas (30.13%). That all three categories exceeded 30% demonstrates the active consumption of these contents relative to other types.

Like the other regions, respondents in the Middle East primarily accessed Korean video and music content through online and mobile platforms. Over 70% of consumers used online and mobile platforms to access Korean dramas, entertainment programs, movies, animations, and K-Pop. Particularly, dramas (80.5%), entertainment programs (80.1%), and animations (81.1%) recorded rates above 80%.

In the Middle East, the channels used to access Korean fashion, beauty, and games differed from those in other regions. First, Korean video content was the most common channel to access fashion, though it ranked second in other regions. Like in other regions, videos and photos on social media were the most popular ways to access beauty-related content; however, events such as local shows, fairs, and exhibitions were the second-most common, thus partially demonstrating the effectiveness of holding local Hallyu-related events. Meanwhile, direct play via online channels was the most common way to access games, as in other regions. However, a difference with other regions is that Korean game videos were ranked as the second-most common channel to access games.

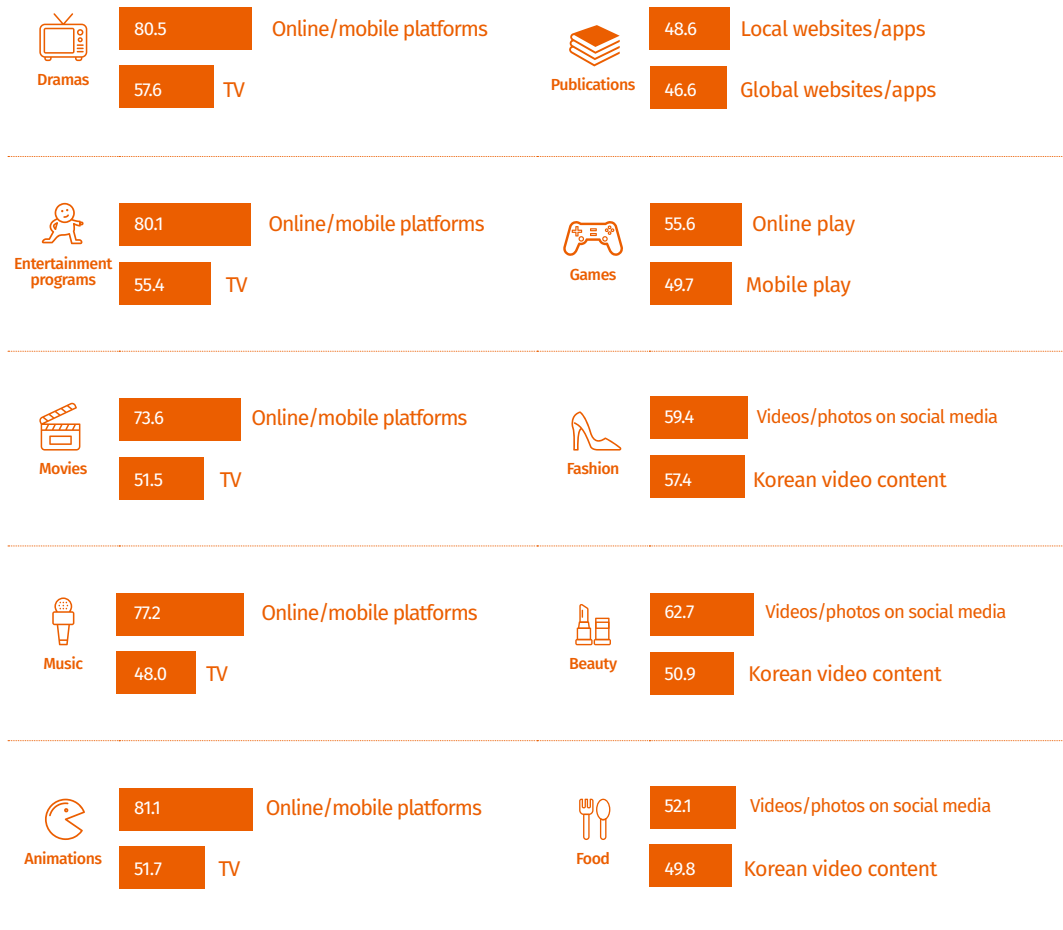
Consumption of Hallyu Content

(Unit: %)



Access Channels to Hallyu Content

(Multiple response, unit: %)



Africa

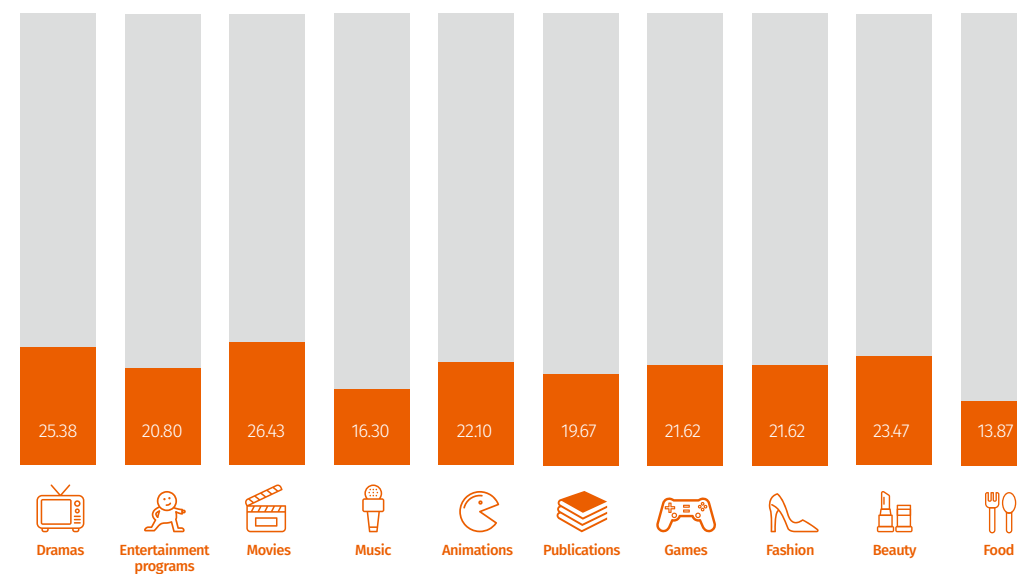
In Africa, consumption of Hallyu content accounted for 18.74% of all cultural content consumption, lower than the average of the five regions (21.45%). Movies (26.43%) were consumed the most, followed by Korean dramas (25.38%), beauty (23.47%), games and fashion (both 21.62%). These results indicate the comparatively active consumption of such content.

Like the other four regions, respondents in Africa reported overwhelmingly high use of online and mobile platforms to access Korean video and music content (72.5% to 86.3%). Particularly, 86.3% of the respondents accessed Korean music via online and mobile platforms, nearly double that of TV (46.2%), the second most used channel of access.

Videos and photos on social media were the most common channel to access content related to Korean fashion, beauty, and food. Many users also watched YouTube videos by individuals (beauty, food) and Korean video content (fashion) to access it. Similar to the results in other regions, most users directly played games on online and mobile platforms, while publications were mostly accessed through local and global sites.

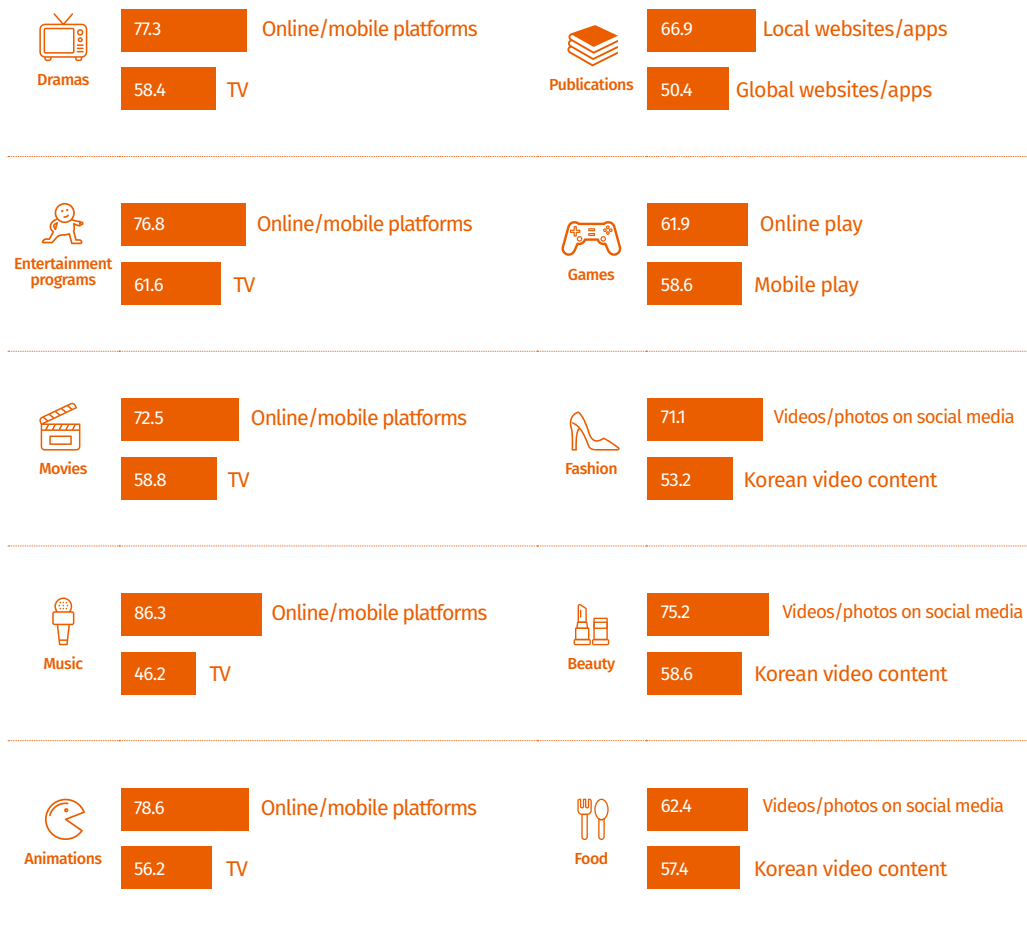
Consumption of Hallyu Content

(Unit: %)



Access Channels to Hallyu Content

(Multiple response, unit: %)



Spread of Hallyu Usage

The spread of Hallyu usage can be indicated by the relevant spread indicators (usage diversity and intensity) and the diffusion of its user groups. Usage diversity is “the degree of diversity with which respondents consume Korean popular culture” and is measured by summing up the number of responses indicating that a respondent has used one of the 10 types of Hallyu content over the past year (measured from 1 to 10). Content with a score of 6 or more is classified as having high usage diversity. Usage intensity is “the degree of intensity with which respondents consume a specific type of Korean popular culture” and is measured by surveying users about their proportion of consumption of the 10 types of Korean content and determining the largest value for each individual (measured from 0 to 100). Content with a score of 50 or more is classified as having high usage intensity.

Meanwhile, based on the usage diversity and intensity of Hallyu content, Hallyu users can be classified into avid, intensive, experimental, or low users. The proportion of avid users tended to be higher in countries where Hallyu was more popularized, and a high proportion of intensive users indicated a high likelihood of popularization in the future. However, proportions of experimental or low users tended to be higher in countries where Hallyu was not yet popularized. The 18 countries surveyed in 2020 recorded an average usage diversity of 4.9 and usage intensity of 35.3.

* For more information on the spread of Hallyu and distribution of Hallyu users, see *A Study on the Economic Ripple Effects of Hallyu in 2020* (Jeon, J.G. and Kim, S.N., 2021)

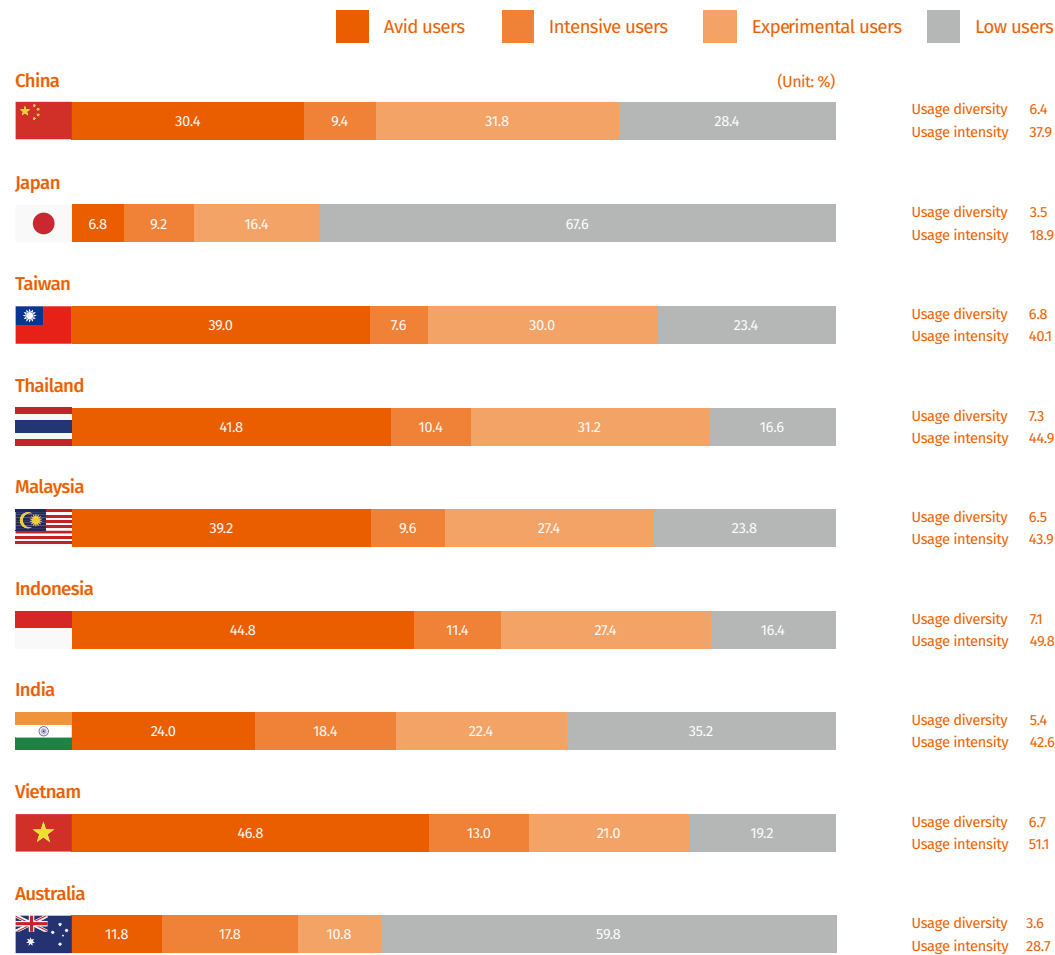
	Usage Spread Indicator	
	Usage Diversity	Usage Intensity
Avid users	≥6	≥50
Intensive users	<6	≥50
Experimental users	≥6	<50
Low users	<6	<50

Asia and Oceania

Thailand recorded the highest usage diversity (73) and Vietnam the highest usage intensity (51.1) among the 18 surveyed countries. In Asia and Oceania, seven countries other than Japan and

Australia scored above the average usage diversity (4.9) and usage intensity (35.3).

Notably, Vietnam was the only country that scored a “High” absolute rating for both usage diversity (6.7) and usage intensity (51.1). In Asia and Oceania, Japan recorded the lowest usage diversity (3.5) and usage intensity (18.9), as was the case in 2019, and its usage intensity was the lowest among all 18 countries.

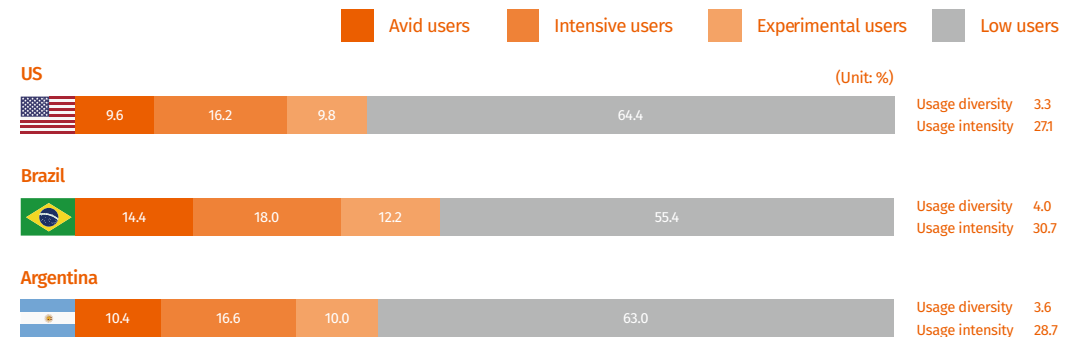


Regarding the distribution of Hallyu users by country, the proportion of avid users in Thailand, Indonesia, and Vietnam exceeded 40%, demonstrating the comparatively vigorous spread of Hallyu. Meanwhile, among the 18 countries, Japan had the smallest share of avid users at 6.8% and the largest share of low users at 67.6%, indicating that it will be challenging to popularize Hallyu in Japan.

Meanwhile, the countries with relatively many experimental users were China (31.8%), Thailand (31.2%), and Taiwan (30.0%). Experimental users formed the smallest group in most countries; only in China did they outnumber avid users, a result also observed in 2019. Experimental users in China used a staggering 8.7 types of Hallyu content in the past year; thus, if they became avid users, the popularization and maturity of Hallyu in China would expand even further.

Americas

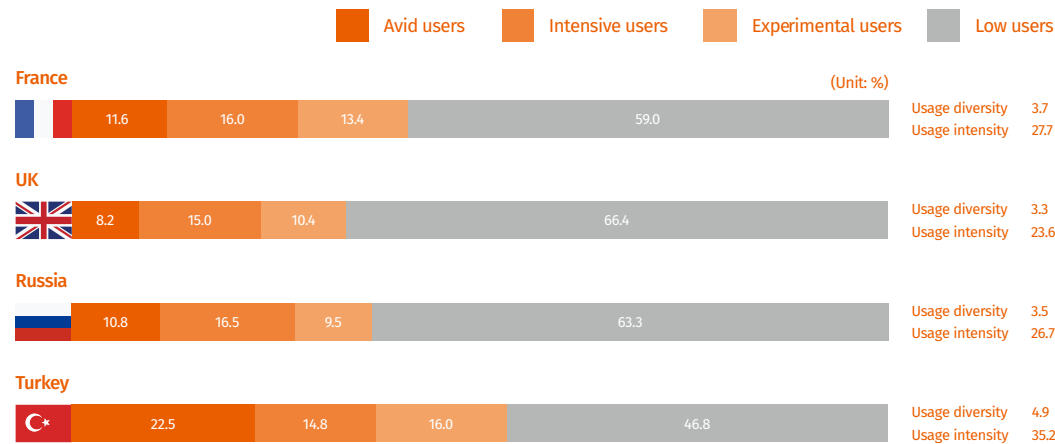
The usage diversity and usage intensity of the three surveyed countries in the Americas were lower than the averages among all 18 countries. The US in particular recorded a usage diversity of 3.3 and usage intensity of 27.1, which were much lower than that of Brazil and Argentina.



Regarding the distribution of Hallyu users, low users outnumbered avid users by five to six times, indicating that it would take quite some time for Hallyu to become popularized. In the US, the ratio of avid users was less than 10% while that of low users was close to 65%.

Europe

Overall, the usage diversity and intensity in Europe were lower than the total average. The UK in particular recorded a usage diversity of 3.3, the lowest among all 18 countries along with the US. In contrast, Turkey was the only country in the region to score close to the overall average, once again demonstrating that Hallyu has become more popularized in Turkey than in other European countries.

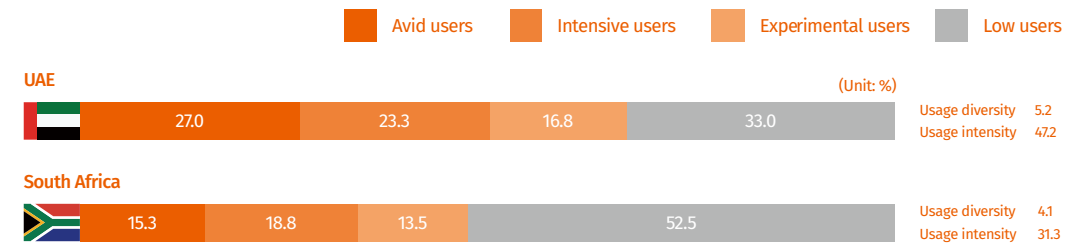


The distribution of Hallyu users also shows that Hallyu has spread the least in France, the UK, and Russia among all countries. In these three countries, low users outnumbered avid users by six to eight times. In particular, after Japan, the UK had the lowest ratio of avid users and the highest ratio of low users. This indicated that among the countries where Hallyu was least popularized, the UK ranked second.

Middle East and Africa

The usage diversity and intensity in the Middle East and Africa did not greatly deviate from the overall average. The UAE scored above-average usage diversity (5.2) and intensity (472), whereas South

Africa scored below-average usage diversity (4.1) and intensity (31.3), which were relatively low numbers.



In terms of the distribution of Hallyu users, the UAE showed relatively uniform ratios of avid, intensive, and low users, while the low users in South Africa outnumbered avid users by about 3.5 times, suggesting that Hallyu has not become very popularized in the country.

Changes in the consumption of Hallyu content compared to before the COVID-19 outbreak

Asia and Oceania

Regarding the changes in the consumption of Hallyu content compared to before the COVID-19 outbreak, Asia and Oceania showed results consistent with the overall trends. That is, many users responded that their consumption of publications and video content (dramas, entertainment programs, movies, games, and animations) increased, and a high percentage responded that their consumption of content for which face-to-face interaction is important (fashion, beauty, and food) decreased.

China, Thailand, Malaysia, Indonesia, and India recorded higher figures than the regional average for most content, whereas Japan, Taiwan, Vietnam, and Australia recorded lower figures than the average.

■ Decrease ■ Similar ■ Increase

(Unit: %, points)

China									
Dramas	10.2	40.6	49.2	5-point scale 3.50	Publications	12.7	35.7	51.6	5-point scale 3.52
Entertainment programs	11.8	35.0	53.2	5-point scale 3.55	Games	12.8	34.7	52.5	5-point scale 3.52
Movies	13.0	38.9	48.1	5-point scale 3.49	Fashion	22.0	34.2	43.8	5-point scale 3.35
Music	12.3	45.0	42.7	5-point scale 3.40	Beauty	15.3	42.4	42.4	5-point scale 3.36
Animations	12.9	42.9	44.2	5-point scale 3.47	Food	27.8	35.1	37.1	5-point scale 3.14

Japan									
Dramas	16.2	57.3	26.5	5-point scale 3.09	Publications	18.7	59.3	22.0	5-point scale 2.99
Entertainment programs	13.0	59.3	27.8	5-point scale 3.17	Games	13.9	62.4	23.8	5-point scale 3.13
Movies	14.0	66.1	19.9	5-point scale 3.06	Fashion	26.1	60.1	13.8	5-point scale 2.85
Music	16.2	61.8	22.0	5-point scale 3.07	Beauty	21.5	60.4	18.1	5-point scale 2.93
Animations	10.1	64.6	25.3	5-point scale 3.18	Food	19.6	68.3	12.1	5-point scale 2.87

Taiwan									
Dramas	9.4	61.2	29.5	5-point scale 3.24	Publications	16.7	63.7	19.7	5-point scale 3.00
Entertainment programs	11.1	64.0	24.9	5-point scale 3.17	Games	15.0	58.6	26.3	5-point scale 3.15
Movies	17.1	58.2	24.7	5-point scale 3.09	Fashion	21.2	61.1	17.7	5-point scale 2.96
Music	14.5	64.7	20.8	5-point scale 3.07	Beauty	21.9	58.6	19.5	5-point scale 2.98
Animations	17.5	61.4	21.1	5-point scale 3.03	Food	23.9	59.2	16.9	5-point scale 2.93

Thailand									
Dramas	14.1	27.5	58.4	5-point scale 3.62	Publications	23.2	32.9	43.9	5-point scale 3.31
Entertainment programs	14.4	32.3	53.3	5-point scale 3.53	Games	14.8	33.2	52.0	5-point scale 3.55
Movies	14.2	30.8	55.0	5-point scale 3.57	Fashion	33.9	28.9	37.2	5-point scale 3.09
Music	14.4	33.9	51.7	5-point scale 3.51	Beauty	25.3	35.9	38.9	5-point scale 3.23
Animations	18.1	33.3	48.6	5-point scale 3.42	Food	29.9	33.5	36.6	5-point scale 3.12

Malaysia									
Dramas	10.3	29.5	60.2	5-point scale 3.70	Publications	18.4	39.5	42.1	5-point scale 3.42
Entertainment programs	10.2	35.4	54.5	5-point scale 3.60	Games	11.7	39.1	49.2	5-point scale 3.34
Movies	9.4	35.1	55.5	5-point scale 3.64	Fashion	31.0	41.2	27.8	5-point scale 2.99
Music	11.2	37.1	51.6	5-point scale 3.54	Beauty	25.2	44.2	30.6	5-point scale 3.11
Animations	15.3	42.1	42.6	5-point scale 3.62	Food	37.9	32.3	29.8	5-point scale 2.92

Indonesia									
Dramas	10.1	28.6	61.3	5-point scale 3.72	Publications	10.0	40.4	49.6	5-point scale 3.53
Entertainment programs	8.1	35.4	56.5	5-point scale 3.62	Games	11.4	36.7	52.0	5-point scale 3.53
Movies	7.2	31.2	61.6	5-point scale 3.68	Fashion	28.6	30.6	40.8	5-point scale 3.17
Music	11.2	37.1	51.6	5-point scale 3.54	Beauty	22.9	33.3	43.8	5-point scale 3.26
Animations	9.1	41.4	49.5	5-point scale 3.49	Food	30.3	33.3	36.4	5-point scale 3.07

India									
Dramas	11.0	27.9	61.0	5-point scale 3.72	Publications	14.7	27.9	57.4	5-point scale 3.72
Entertainment programs	9.4	24.5	66.0	5-point scale 3.72	Games	10.8	26.8	62.4	5-point scale 3.72
Movies	10.8	28.6	60.6	5-point scale 3.72	Fashion	23.1	27.1	49.8	5-point scale 3.72
Music	8.9	29.5	61.6	5-point scale 3.72	Beauty	24.5	26.5	49.0	5-point scale 3.72
Animations	11.6	32.3	56.1	5-point scale 3.72	Food	25.6	20.2	54.2	5-point scale 3.72

Vietnam									
Dramas	14.8	47.0	39.4	5-point scale 3.36	Publications	21.2	45.6	33.2	5-point scale 3.16
Entertainment programs	19.4	38.2	42.4	5-point scale 3.29	Games	19.3	34.3	46.4	5-point scale 3.38
Movies	17.7	38.1	44.3	5-point scale 3.33	Fashion	32.8	40.2	27.0	5-point scale 2.96
Music	17.2	38.1	44.3	5-point scale 3.31	Beauty	28.8	39.0	32.2	5-point scale 3.08
Animations	20.3	53.2	26.6	5-point scale 3.07	Food	32.3	37.8	29.8	5-point scale 2.98

Australia									
Dramas	13.6	47.0	39.4	5-point scale 3.31	Publications	23.1	34.6	42.3	5-point scale 3.31
Entertainment programs	11.7	46.6	41.7	5-point scale 3.37	Games	17.6	43.1	39.2	5-point scale 3.32
Movies	14.8	54.0	31.2	5-point scale 3.23	Fashion	20.8	44.6	34.6	5-point scale 3.22
Music	15.6	58.1	26.3	5-point scale 3.15	Beauty	22.4	48.7	28.9	5-point scale 3.09
Animations	13.3	57.5	29.2	5-point scale 3.25	Food	23.8	50.8	25.4	5-point scale 3.01

Argentina									
Dramas	14.7	38.2	47.1	5-point scale 3.46	Publications	12.8	41.3	45.9	5-point scale 3.43
Entertainment programs	13.2	40.3	46.5	5-point scale 3.40	Games	17.7	32.0	50.3	5-point scale 3.39
Movies	9.9	44.9	45.2	5-point scale 3.43	Fashion	48.1	31.8	20.1	5-point scale 2.62
Music	16.6	37.1	46.4	5-point scale 3.36	Beauty	41.9	23.9	34.2	5-point scale 2.96
Animations	16.4	37.1	46.4	5-point scale 3.35	Food	43.5	32.9	23.6	5-point scale 2.67

Americas

In the Americas, more respondents reported that their consumption of contactless content increased compared to face-to-face content. The US and Argentina showed similar results as the overall average in all categories, whereas Brazil recorded above-average figures for most categories except beauty, indicating that the consumption of Korean content increased after the COVID-19 outbreak.

Europe

Compared to the other regions, Europe showed little change in the consumption of face-to-face and contactless content. The gap between the highest-scoring entertainment programs (3.38) and lowest-scoring fashion (2.93) was small compared to the other regions. The UK recorded the lowest averages for most content in not only Europe but among all countries, whereas Turkey showed the most Hallyu consumption compared to before COVID-19 for all categories in Europe.

Decrease Similar Increase

(Unit: %, points)

US									
Dramas	17.6	36.6	45.8	5-point scale 3.45	Publications	20.0	38.9	41.1	5-point scale 3.39
Entertainment programs	21.1	30.3	48.6	5-point scale 3.43	Games	17.1	41.1	41.8	5-point scale 3.34
Movies	22.7	35.9	41.4	5-point scale 3.30	Fashion	23.6	38.6	37.8	5-point scale 3.23
Music	18.9	47.1	34.0	5-point scale 3.20	Beauty	21.1	41.0	37.9	5-point scale 3.20
Animations	21.4	41.6	37.0	5-point scale 3.18	Food	29.2	45.8	25.1	5-point scale 2.97

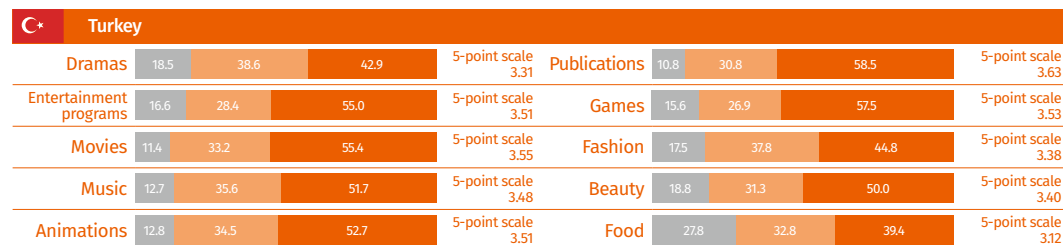
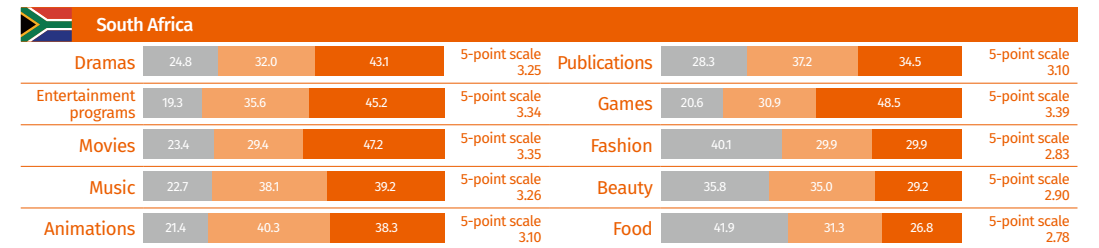
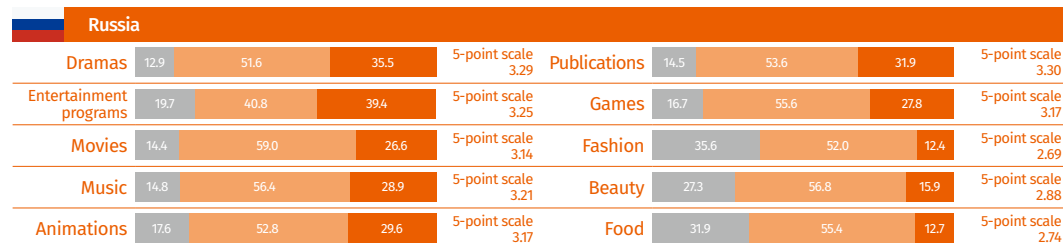
Decrease Similar Increase

(Unit: %, points)

France									
Dramas	15.7	47.2	37.1	5-point scale 3.29	Publications	12.3	49.3	38.4	5-point scale 3.35
Entertainment programs	12.4	43.8	43.8	5-point scale 3.42	Games	14.7	51.3	34	5-point scale 3.25
Movies	14.2	56.5	29.3	5-point scale 3.20	Fashion	22.9	50.3	26.8	5-point scale 3.04
Music	15.5	52.7	31.8	5-point scale 3.21	Beauty	23.4	46.2	30.3	5-point scale 3.10
Animations	12.2	51.4	36.5	5-point scale 3.33	Food	23.1	49.6	27.3	5-point scale 3.09

Brazil									
Dramas	13.6	30.1	56.3	5-point scale 3.61	Publications	24.6	31.5	43.8	5-point scale 3.32
Entertainment programs	19.8	32.3	47.9	5-point scale 3.40	Games	16.7	31.3	52.0	5-point scale 3.53
Movies	11.5	38.5	50.0	5-point scale 3.50	Fashion	33.8	27.2	39.0	5-point scale 3.06
Music	17.4	36.8	45.7	5-point scale 3.39	Beauty	32.9	29.0	38.1	5-point scale 3.08
Animations	16.5	32.6	50.8	5-point scale 3.44	Food	36.8	28.0	35.2	5-point scale 2.98

UK									
Dramas	24.0	40.8	35.2	5-point scale 3.14	Publications	24.2	40.0	35.8	5-point scale 3.15
Entertainment programs	23.6	39.1	37.3	5-point scale 3.19	Games	25.8	47	27.2	5-point scale 2.99
Movies	21.8	51.3	26.9	5-point scale 3.06	Fashion	31.3	43.8	25.0	5-point scale 2.88
Music	18.8	53.2	28.0	5-point scale 3.13	Beauty	30.8	38.4	30.8	5-point scale 2.98
Animations	21.1	54.6	24.3	5-point scale 3.06	Food	30.3	49.3	20.4	5-point scale 2.85

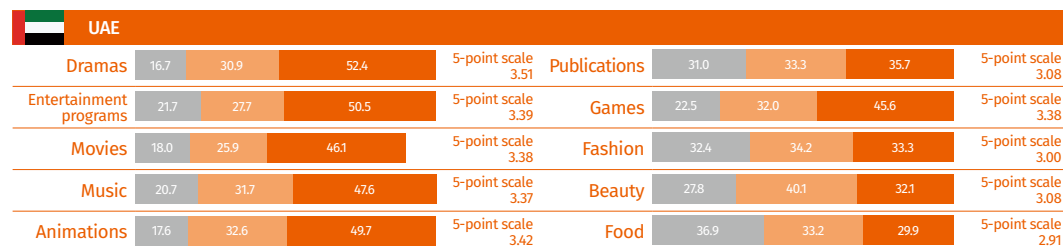


Middle East and Africa

The Middle East and Africa showed conspicuous changes in the consumption of face-to-face and contactless content, and most categories scored slightly below the regional averages. The UAE scored above the average for most categories while South Africa scored below the average for all categories, indicating that the consumption of Korean content did not greatly increase compared to before the COVID-19 outbreak.

■ Decrease ■ Similar ■ Increase

(Unit: %, points)



Popularity of Hallyu

Popularity and Favorability of Hallyu Content

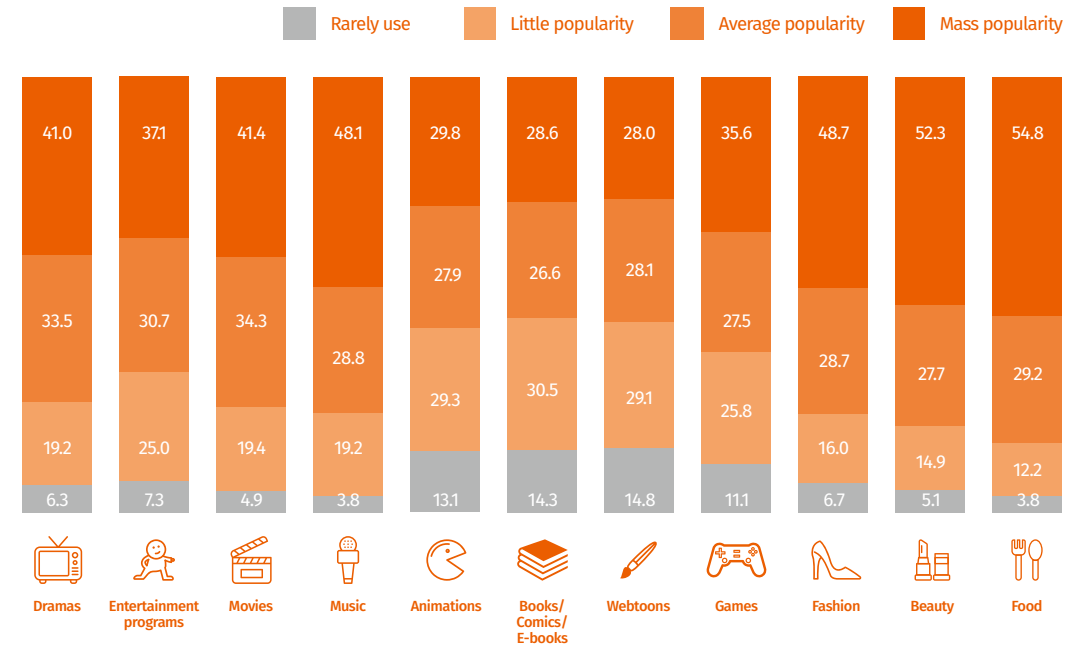
Asia and Oceania

According to evaluations of the popularity of Hallyu content in Asia and Oceania, the average response rate for “mass popularity” for all content was 40.5%. This was the highest among the five regions for the second consecutive year. Over half of the respondents perceived that Korean beauty and food are gaining popularity in their home countries, and over 48% perceived that Korean music and fashion have high mass popularity as well.

However, of the 10 different types of content among those who have experienced Hallyu content, the favorability of Korean entertainment programs was the highest at 81.2%, followed by movies and dramas. Respondents’ perception of the mass popularity of entertainment programs was relatively low compared with the content’s favorability, whereas music showed low favorability but was gaining considerable mass popularity.

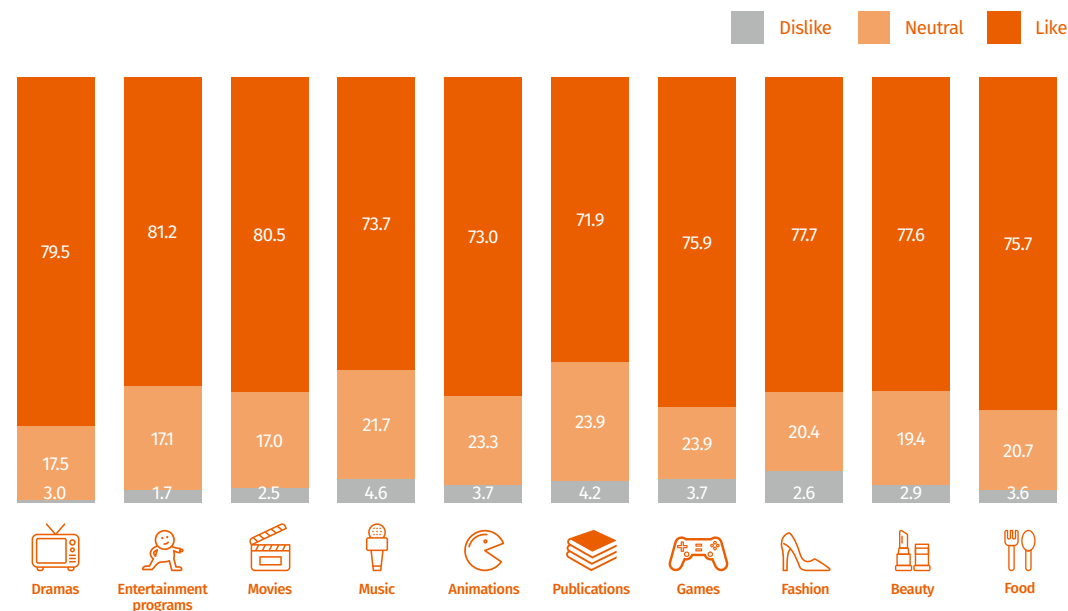
Local popularity

(Unit: %)



Favorability among those with experience

(Unit: %)



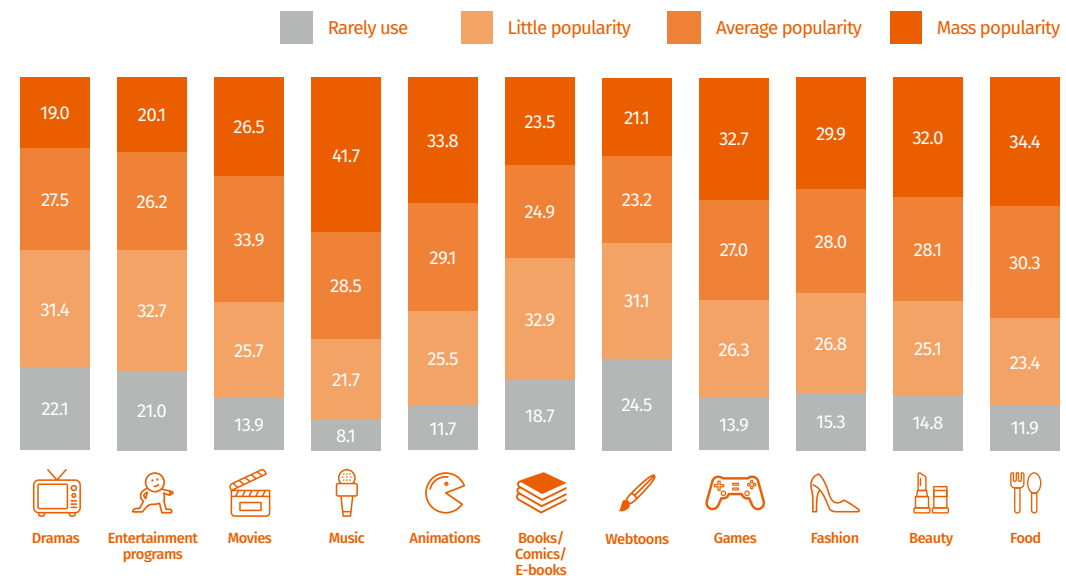
Americas

In the Americas, the Hallyu content with the highest mass popularity was K-Pop; it was the only type with a response rate exceeding 40%. Korean food dropped from first in 2019 to second in the current survey, followed by animations, games, and beauty. Over 30% of respondents perceived these Hallyu contents to have local mass popularity.

Among those with experience of Hallyu content, beauty recorded the highest favorability at 83%, followed by food, entertainment programs, and dramas, all with response rates exceeding 80%. While the mass popularity of entertainment programs and dramas was rather low at around 20%, both categories showed high favorability at rates exceeding 80%, ranking third and fourth, respectively. In contrast, music ranked first in mass popularity but last in favorability (71.6%) among the 10 types of content, indicating an enormous gap between popularity and favorability.

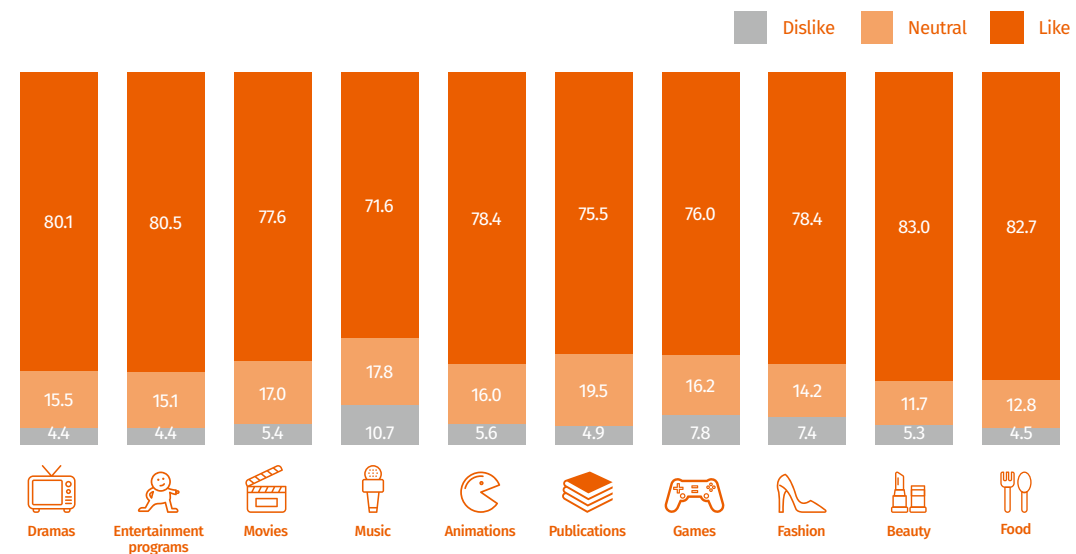
Local popularity

(Unit: %)



Favorability among those with experience

(Unit: %)



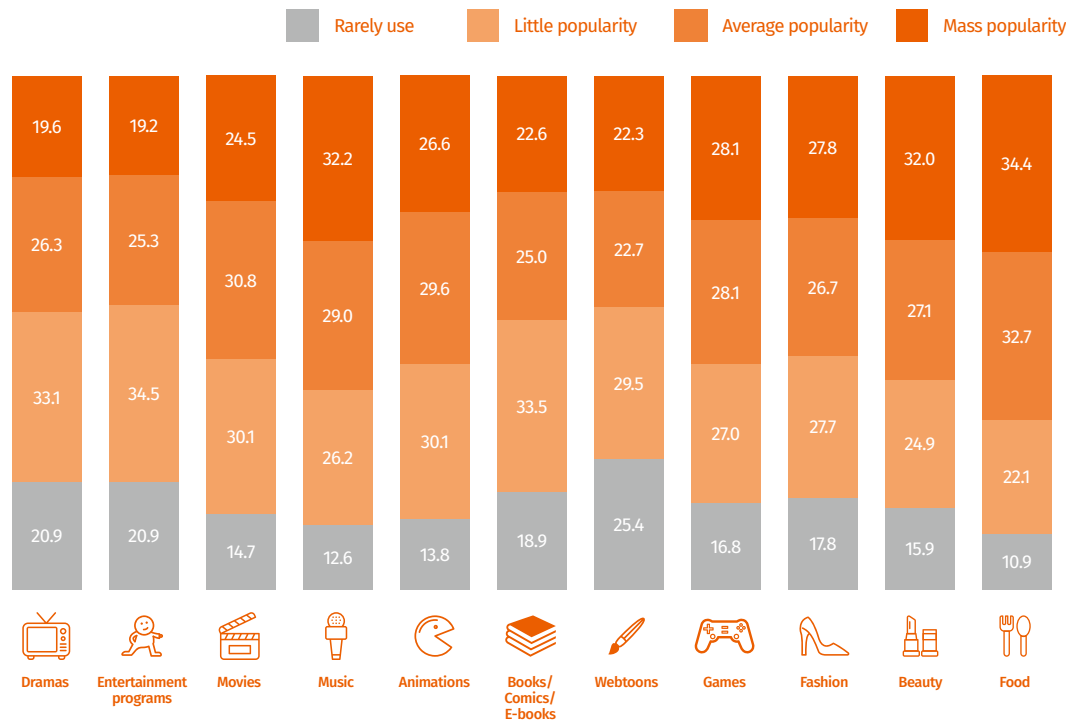
Europe

In Europe, the mass popularity of Hallyu content was the lowest among all regions, with an average of 23.1%. Korean food ranked first at close to 35%, followed by K-Pop and beauty with rates above 30%, showing similar results to the 2019 survey.

Meanwhile, the average favorability of Europeans with Hallyu experience was also the lowest among all regions, mirroring the 2019 result. Only Korean food recorded favorability above 70%, followed by movies, beauty, and entertainment programs. Conversely, only K-Pop recorded favorability below 60%, a low rate compared to the perception of its mass popularity. For this category, most regions showed a large gap between popularity and favorability.

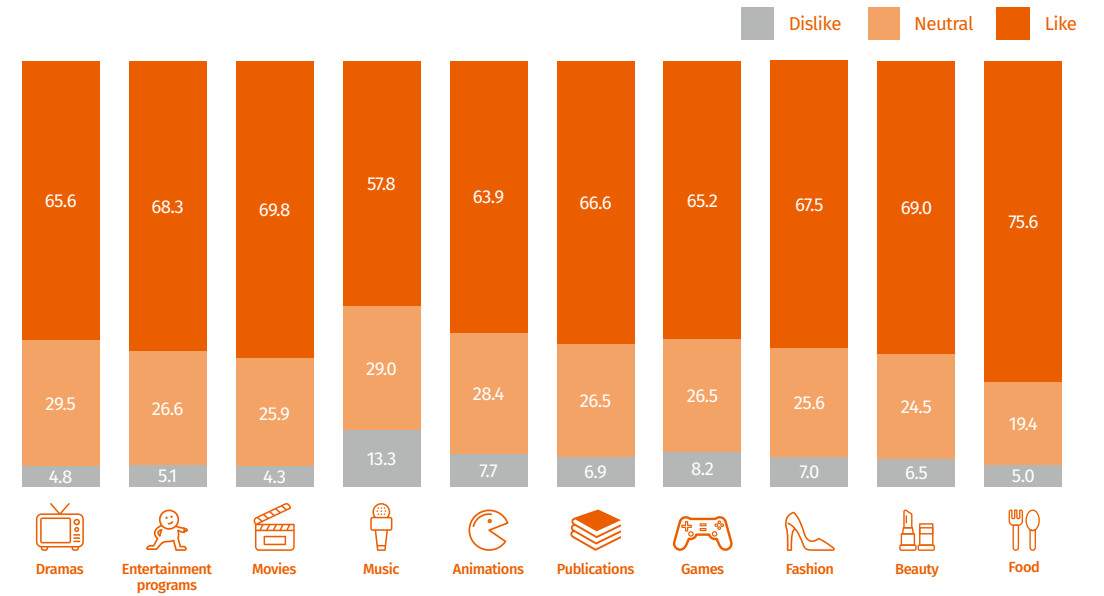
Local popularity

(Unit: %)



Favorability among those with experience

(Unit: %)



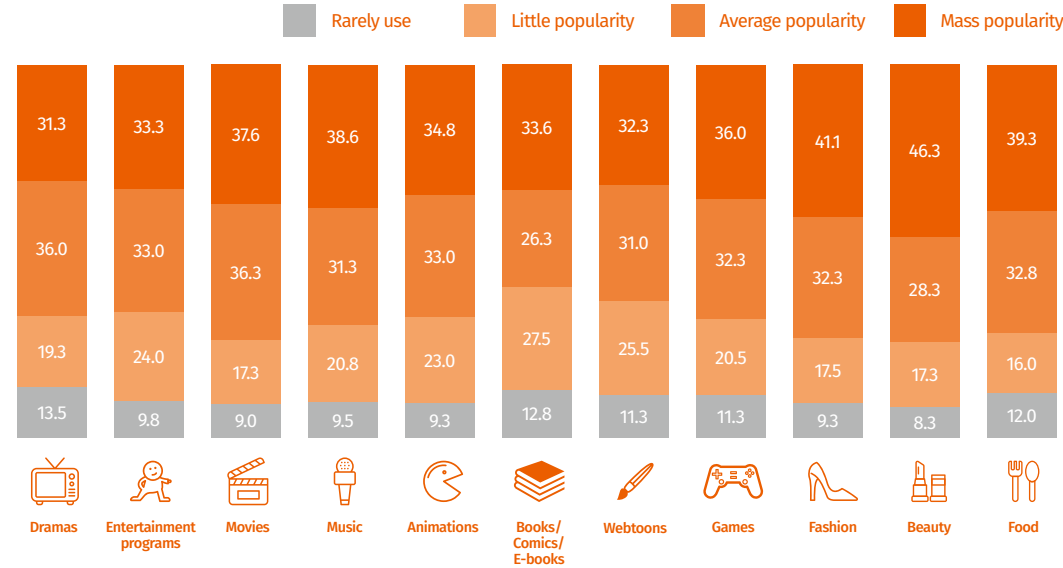
Middle East

The average popularity of Hallyu content in the Middle East was 35.4%, following Asia to take second place for the second consecutive year. As in 2019, Korean beauty recorded the highest popularity at 46.3%, followed by fashion and Korean food.

Movies ranked first for favorability, the only category that exceeded 80%, while dramas, fashion, and entertainment programs also showed high favorability. Conversely, Korean food and K-Pop showed relatively low favorability compared with their high popularity, raising concerns about a drop in their reuse rate.

Local popularity

(Unit: %)



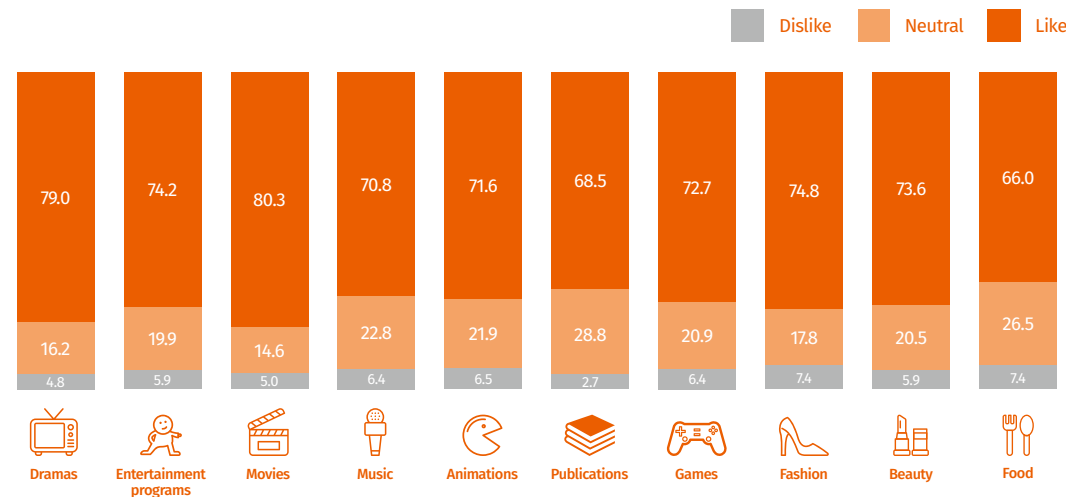
Africa

Following Europe, Africa ranked second-to-last for Hallyu popularity. Only about 25% of respondents in this region answered that Hallyu content has mass popularity. The local respondents perceived Korean food as the most popular content, followed by beauty and games, with response rates exceeding 30%. These categories were relatively popular, whereas dramas, entertainment programs, and webtoons showed very little mass popularity at about 17-18%.

Similar to the popularity ratings, food, fashion, and beauty all showed high favorability; dramas and entertainment programs in particular recorded 81.8% and 72.5%, respectively, a huge difference with their low popularity. This indicates the need for measures to expand opportunities for locals to access dramas and entertainment programs.

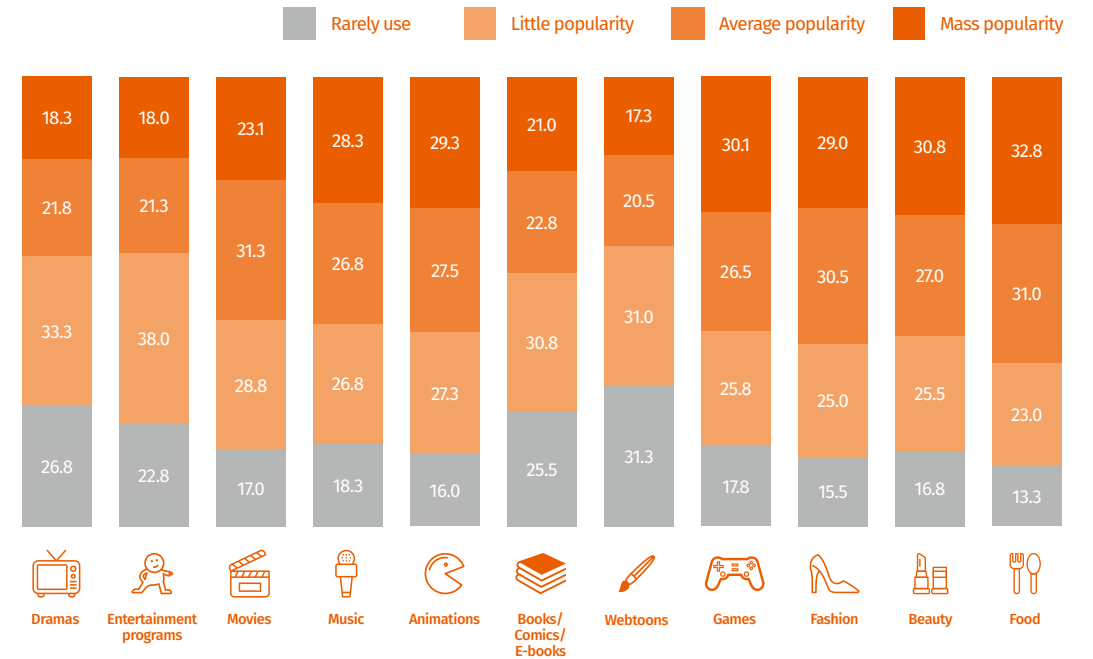
Favorability among those with experience

(Unit: %)



Local popularity

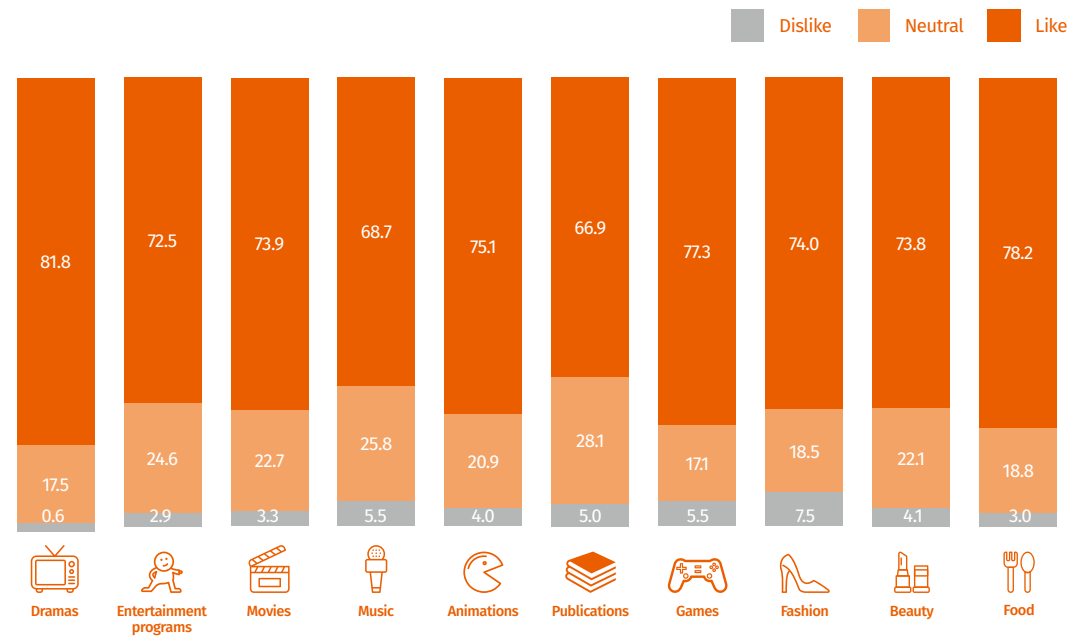
(Unit: %)



Factors for Popularity and Factors that Hinder Favorability of Hallyu Content

Favorability among those with experience

(Unit: %)



Asia and Oceania

The factors attributed to the popularity and those that hinder the favorability of Hallyu content were generally similar to those in 2019. First, regarding dramas and movies, respondents cited the actors' attractive appearance and well-structured storylines as factors increasing favorability, and language-related reasons such as inconvenient subtitles or dubs and the difficulty and unfamiliarity of the Korean language as factors hindering favorability. One of the major factors hindering the favorability of dramas was that the material, storylines, and genre were clichéd and uniform; for movies, many responded that the content was difficult to understand because of differences in language and culture.

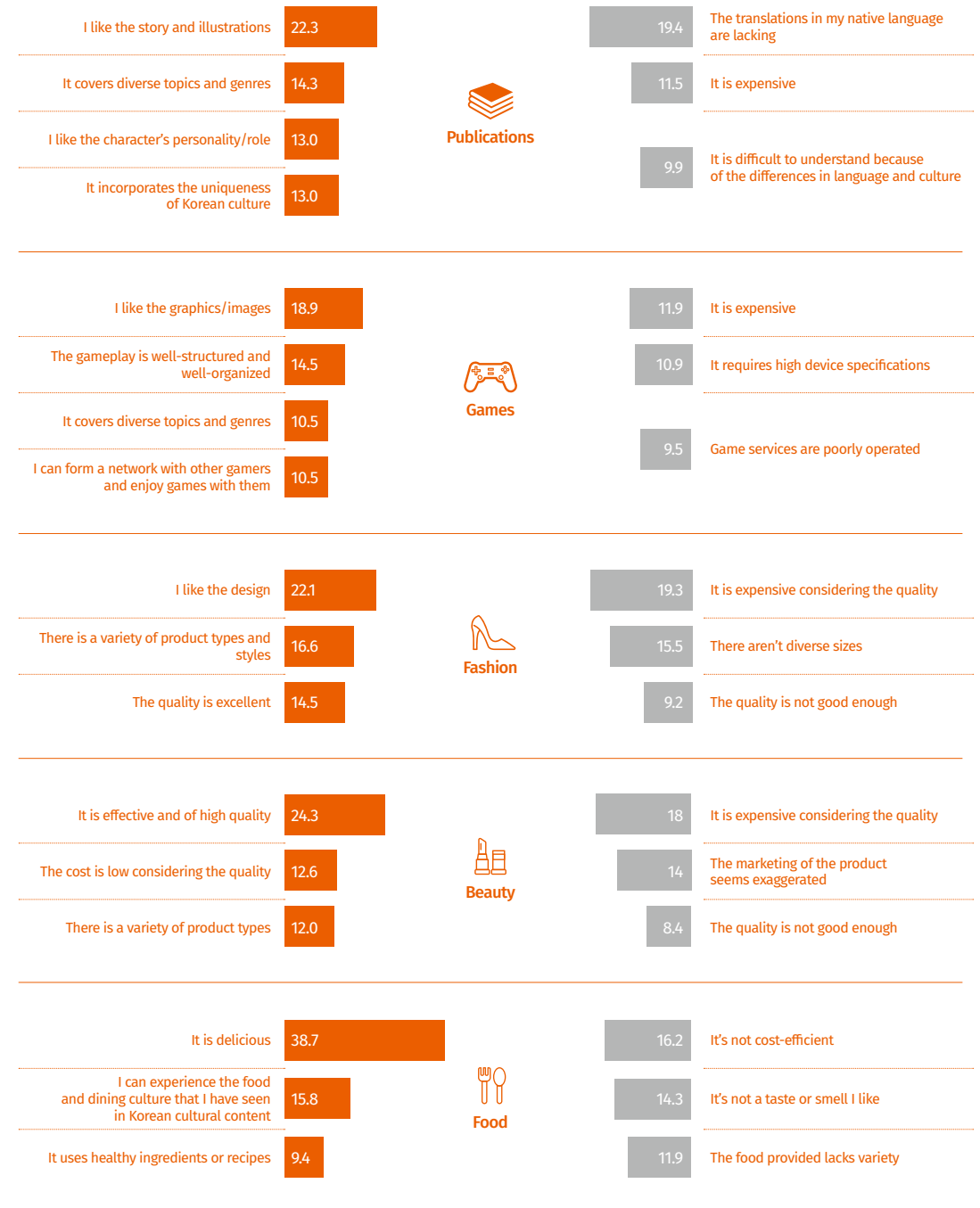
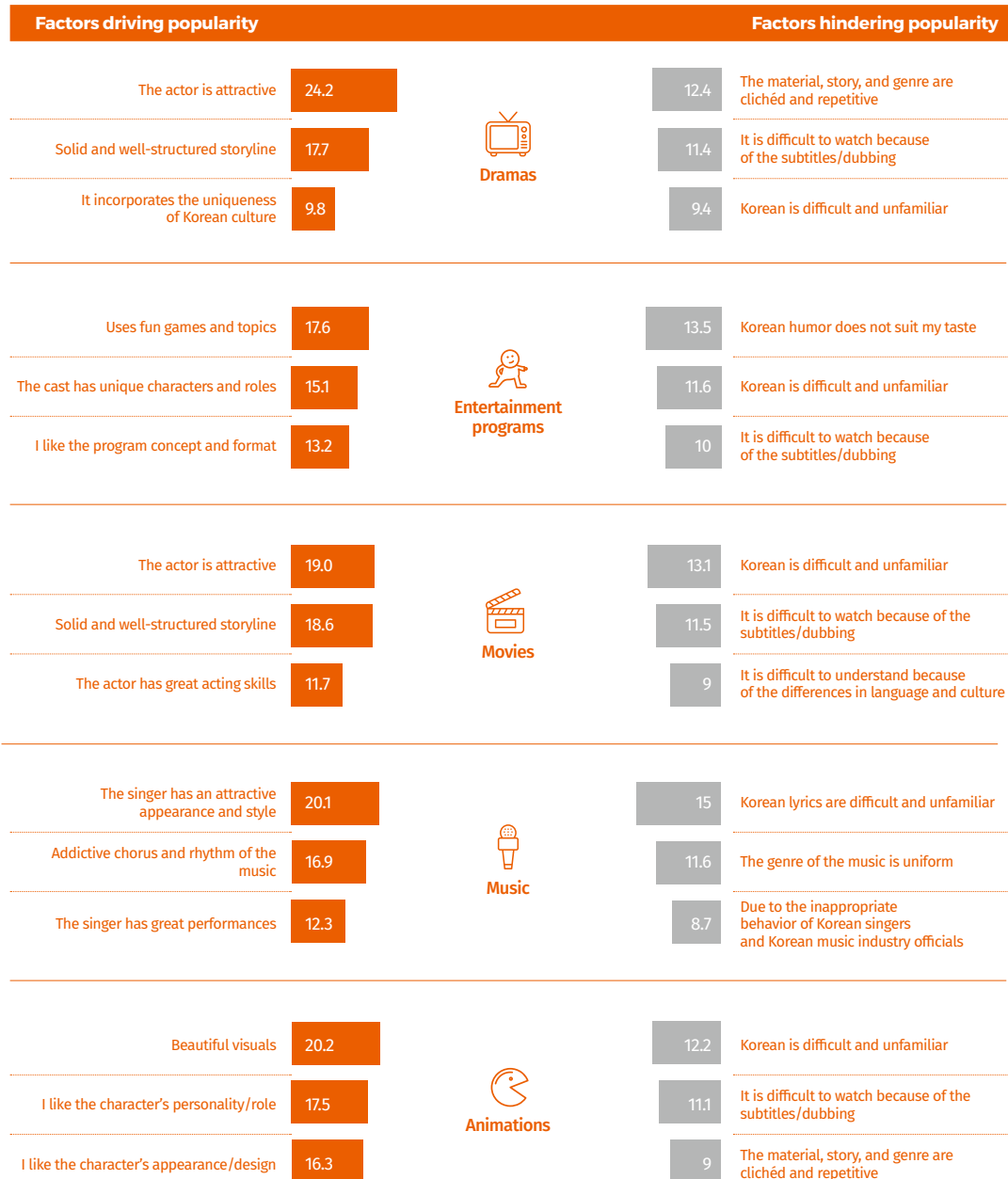
The main popularity factors of entertainment programs were related to content and quality, including the use of fun games and topics, the unique characters and roles of the cast, and favorable program concepts and formats. On the other hand, the most common factor hindering popularity was "Korean humor does not suit me"; language and cultural factors were also cited. Regarding music, respondents cited the attractive appearance and style and excellent performances of K-Pop singers as the major factors driving popularity. Meanwhile, the main factors inhibiting favorability included the difficulty in understanding Korean lyrics, the uniformity of the music genres, and the inappropriate behavior of Korean singers.

Animations' beautiful visuals and interesting characters were found to drive favorability, whereas language difficulties and the content's lack of originality hindered favorability. Like animations, factors driving the favorability of publications were related to their qualitative value, and factors inhibiting favorability included the lack of translations in the respondent's native language and difficulty in understanding the content due to differences in language and culture. Many respondents also cited the high cost of use as a factor hindering favorability.

Factors driving the popularity of games included their high-quality graphics and images, well-structured and well-organized gameplay, and ability to form a network with other gamers. Meanwhile, their high cost, high device specifications, and poor service operation were found to hinder favorability. The results for fashion were somewhat mixed: respondents cited the products' excellent designs, quality, and variety as the main favorability factors, and their low cost-effectiveness, limited sizes, and lack of diverse styles as factors inhibiting favorability. Beauty showed similar results to fashion: the excellent quality and variety of products were the major favorability factors, and low cost-effectiveness and dissatisfaction with quality were the major factors inhibiting favorability. The products' exaggerated marketing was also a factor hindering favorability.

For Korean food, taste was the greatest factor driving popularity. The respondents' ability to experience the Korean food and dining culture that they saw in Hallyu content ranked second, indicating that experiencing Hallyu content amplifies the consumer's interest in Korean food. On the other hand, low cost-effectiveness, undesirable taste and smell, and lack of variety were factors inhibiting favorability.

Top 3, Unit: %

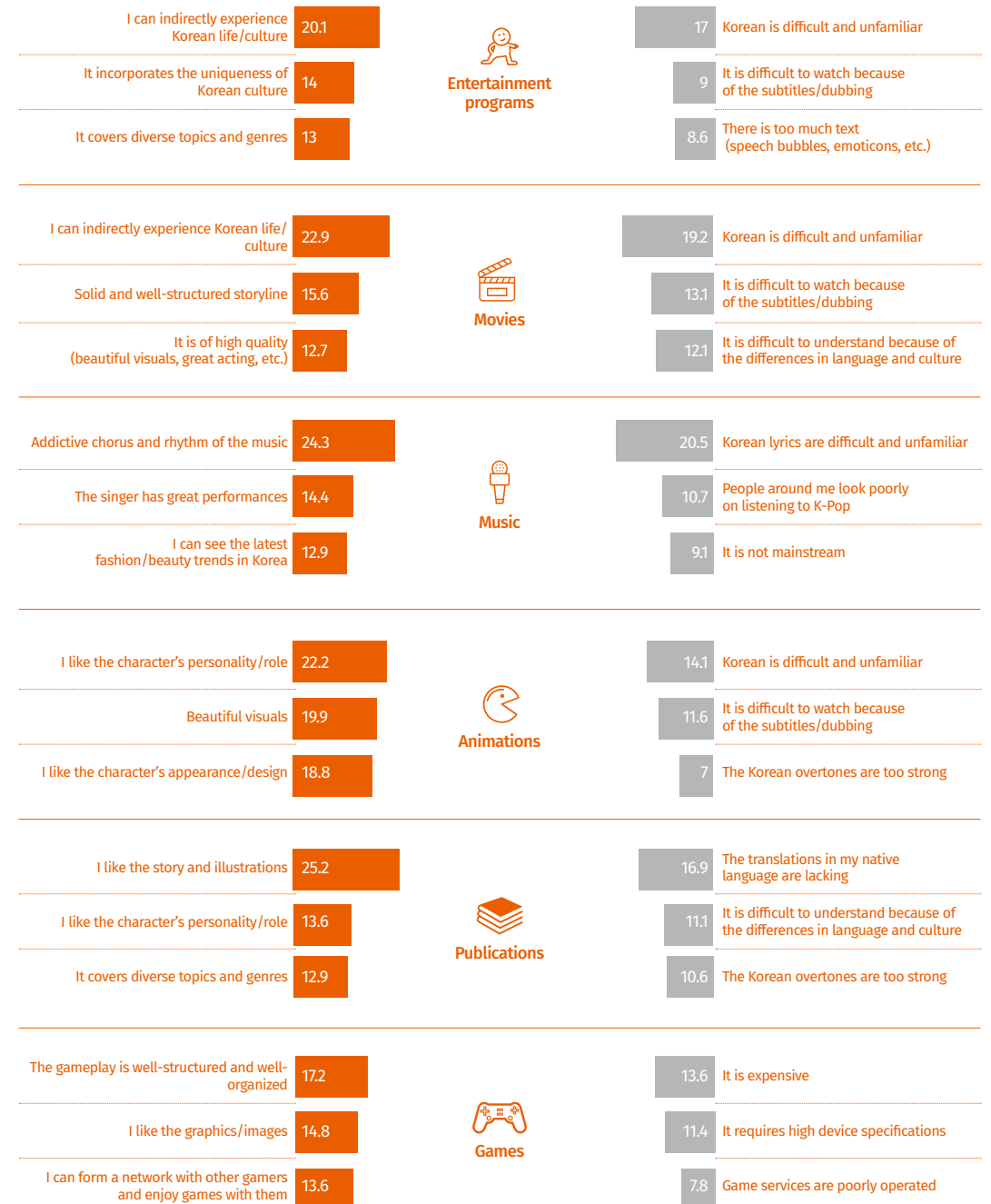


Americas

In the Americas, the ability to indirectly experience Korean culture was the most common popularity factor for Korean dramas, movies, and entertainment programs, unlike Asia and Oceania. The second-highest popularity factor for dramas was that they incorporate the uniqueness of Korean culture, suggesting that respondents in the Americas consume Hallyu content because they are attracted to Korea's exotic culture. These results considerably differ from those in Asia, where Korean culture is much more accessible.

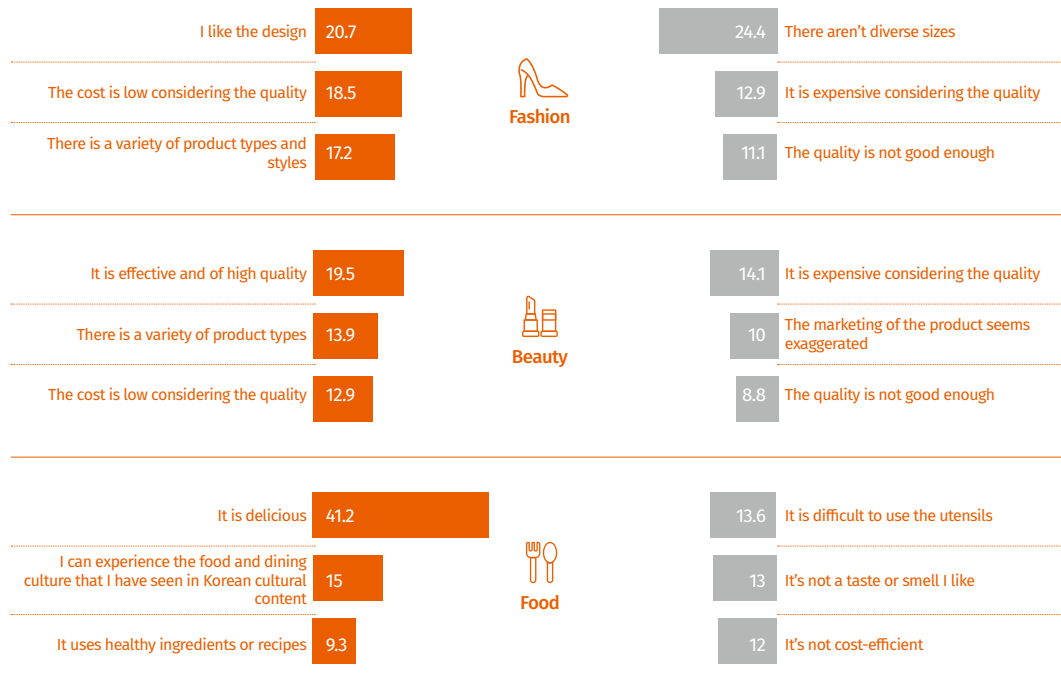
Meanwhile, in the Americas, language-related factors were the primary impediments to the favorability of videos, music, and publications. Such reasons include the fact that Korean is difficult and unfamiliar and that it is inconvenient to consume the content through subtitles or dubs, which were the top factors that hindered favorability. Regarding K-Pop, the music's addictive chorus and rhythm was the top popularity factor for the second consecutive year, followed by the excellent performances and appearances of K-Pop singers and groups.

For games, the factors driving or hindering favorability were the same as in Asia and Oceania; fashion and beauty showed similar results as well. However, the top impediment to favorability for fashion was the lack of diverse sizes, highlighting the importance of considering differences in body type when exporting to the Americas. The difficulty of using utensils was the greatest factor hindering favorability for Korean food, revealing the need to more proactively teach consumers how to use the utensils or provide alternatives such as forks in restaurants.



Top 3, Unit: %



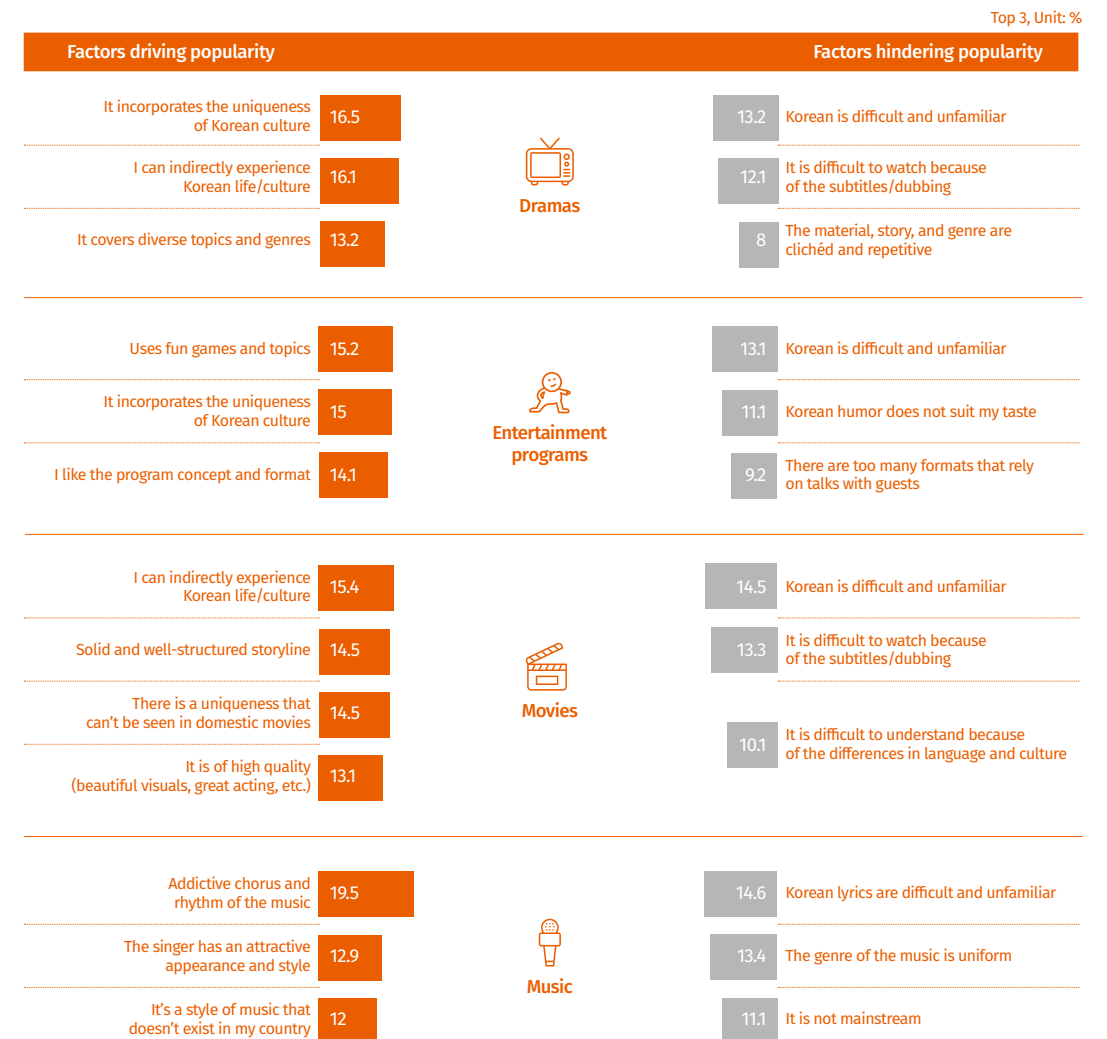


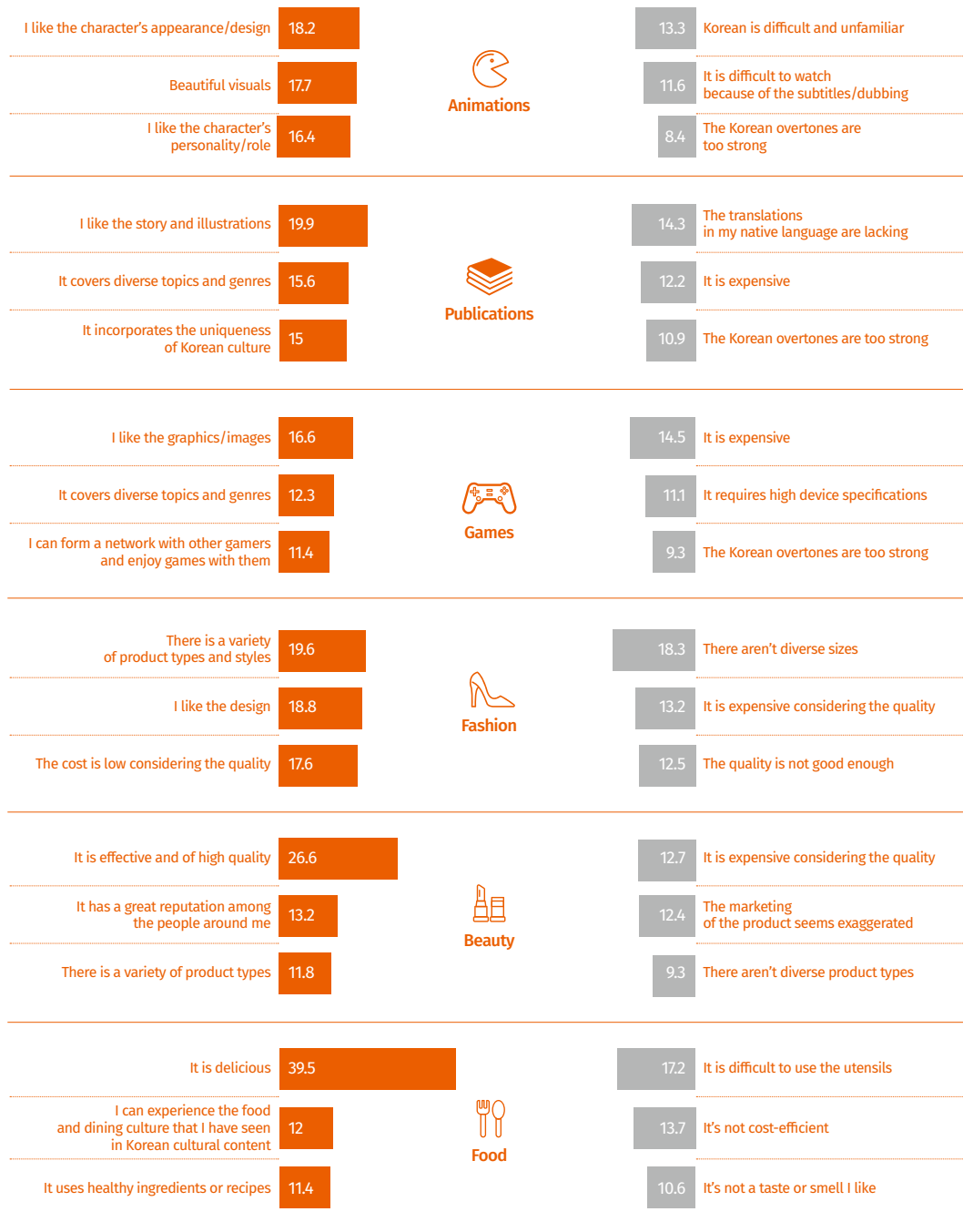
Europe

As in the Americas, curiosity toward Korean culture was a major popularity factor for most types of Hallyu content in Europe. Regarding the popularity factors for videos, music, and publications, the uniqueness of Korean culture and the ability to indirectly experience Korean life and culture were among the top factors for most of the content. For entertainment programs, movies, and animations, satisfaction with the quality of the content itself was the most important favorability factor. In contrast, Korean-related elements had almost no influence on favorability for games, as was observed in other regions. Instead, the top popularity factors for games included their high-quality graphics and images, variety of material and genres, and ability to form a network with other gamers.

In categories where language-related elements are critical (video, music, and publications), the

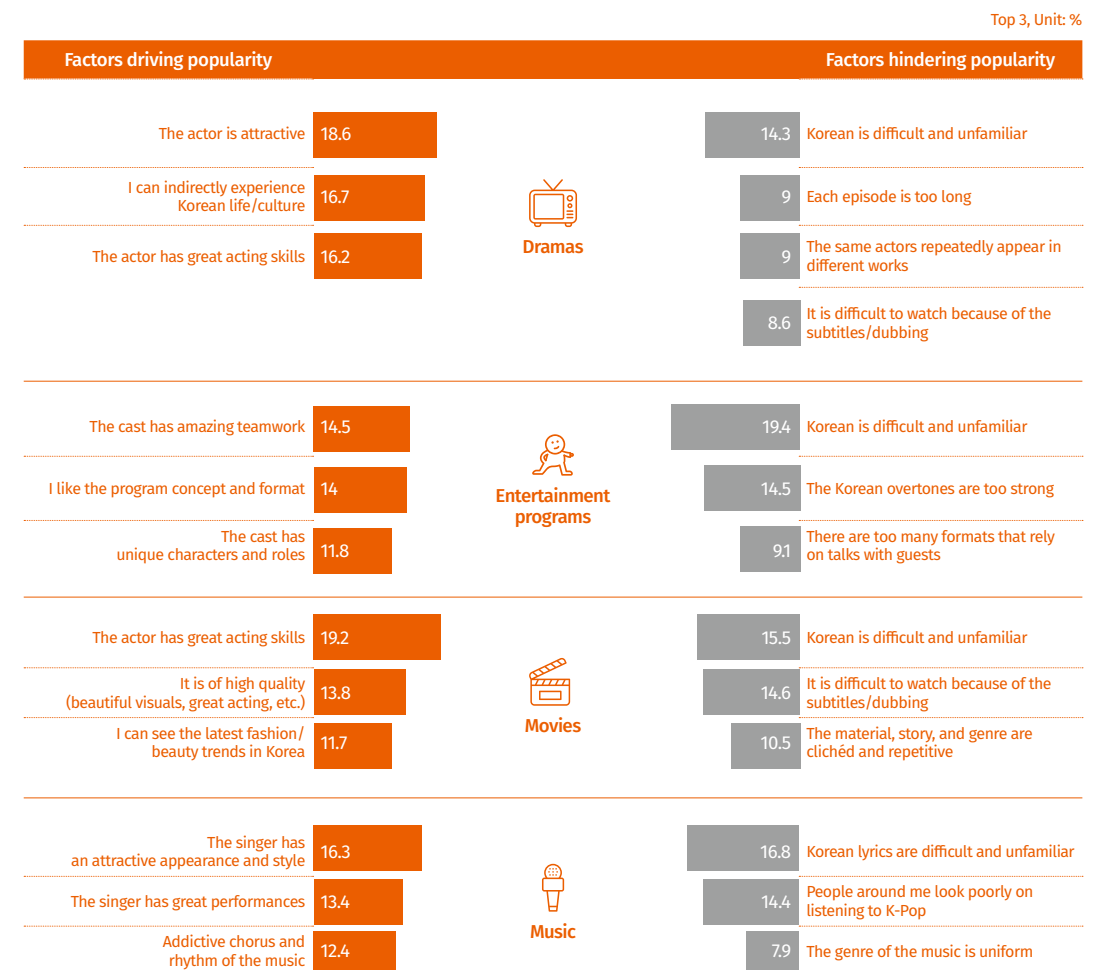
difficulty of Korean and inconvenience of translation, subtitles, and dubs were major factors hindering favorability. For dramas and music, the uniformity of content was a major impediment. Cost burden and dissatisfaction were factors hindering favorability for games, fashion, and beauty. Meanwhile, as in the Americas, the inconvenience of utensils was the greatest impediment to favorability for food, demonstrating that differences in food culture (i.e., whether chopsticks are used) have a substantial impact.

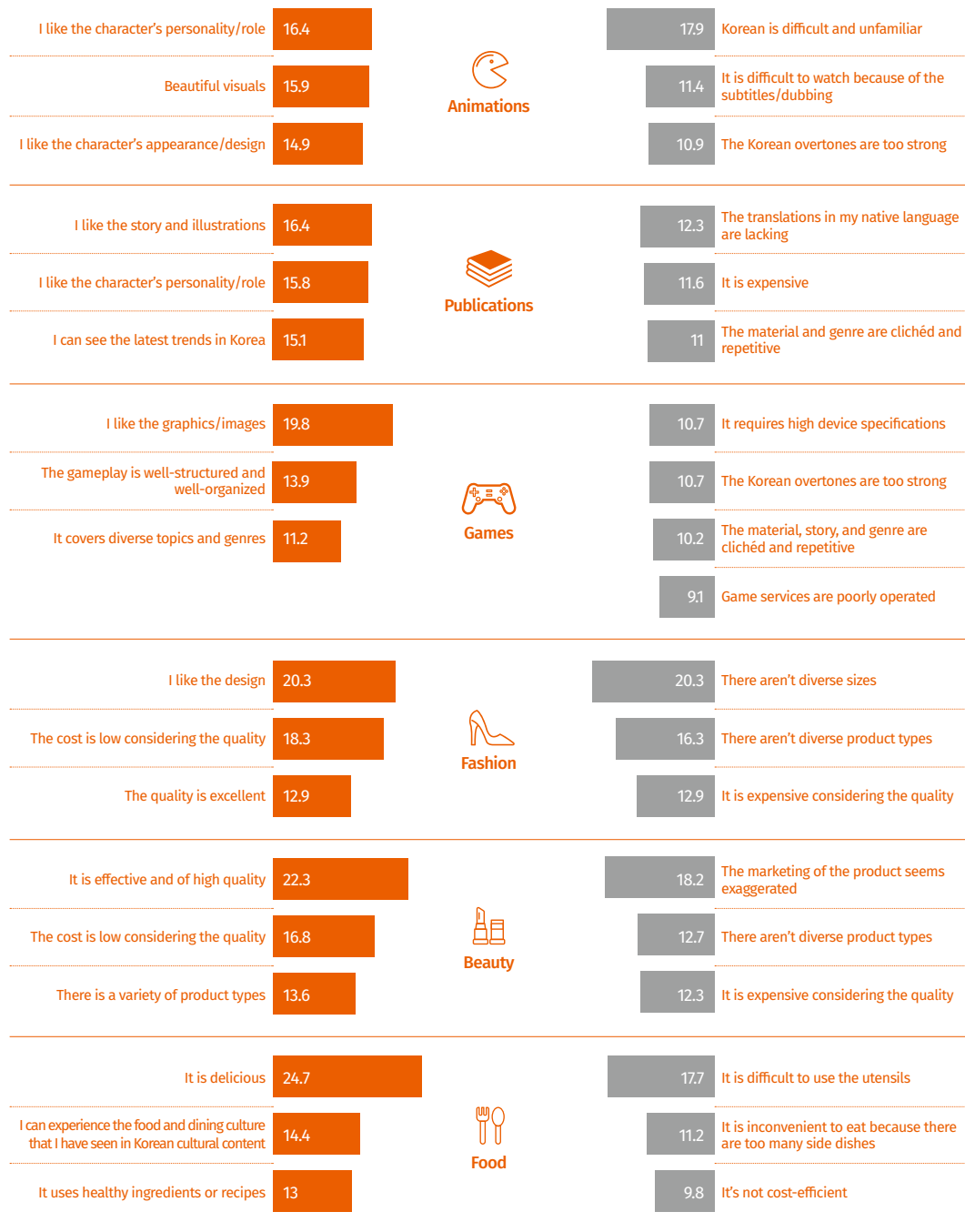




Middle East

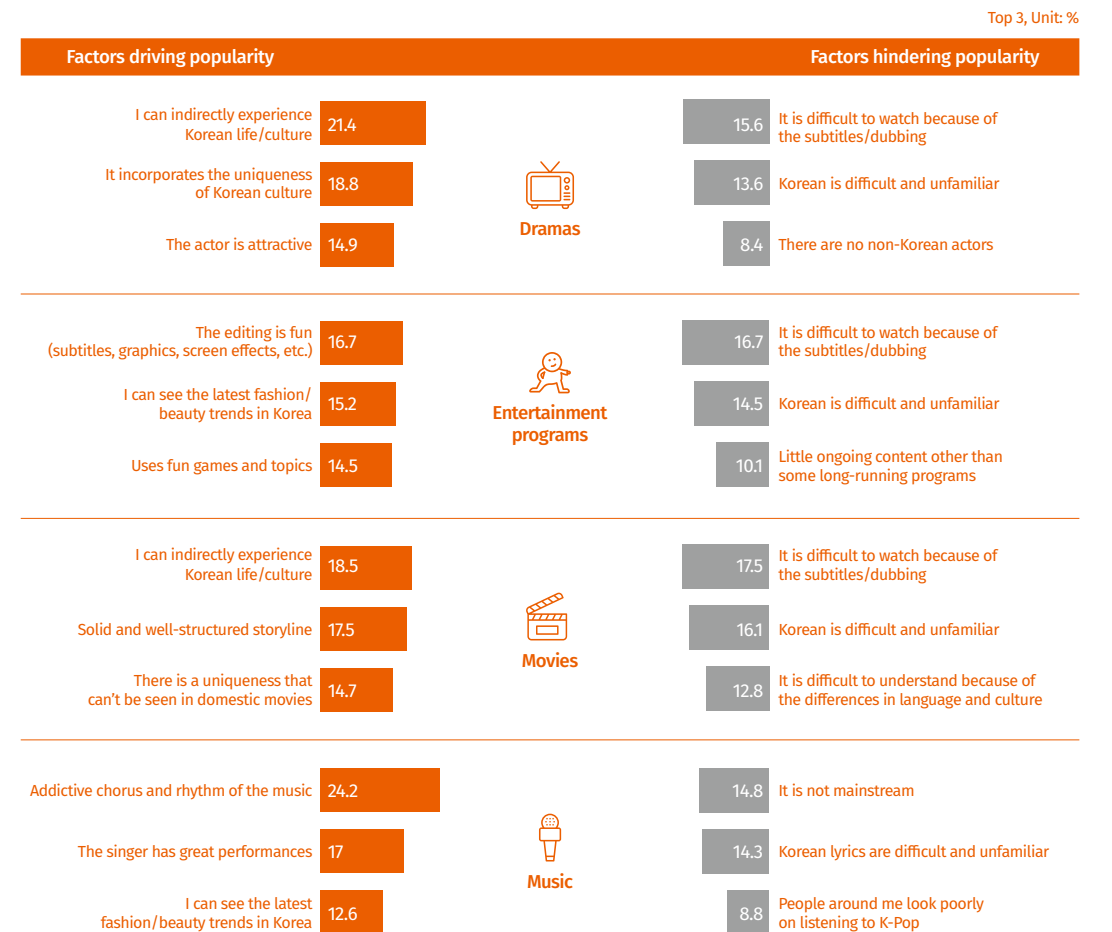
The results from the Middle East were more similar to those of Asia and Oceania than of the Americas or Europe, suggesting the influence of geographical proximity. Other than the second-place favorability factor for dramas, the major favorability factors for Korean videos and music were mostly related to the qualities of the content itself. Conversely, the factors impeding favorability for videos, music, and publications were mostly language-related, as was found in other regions. Games, fashion, beauty, and food also showed similar results with other regions.

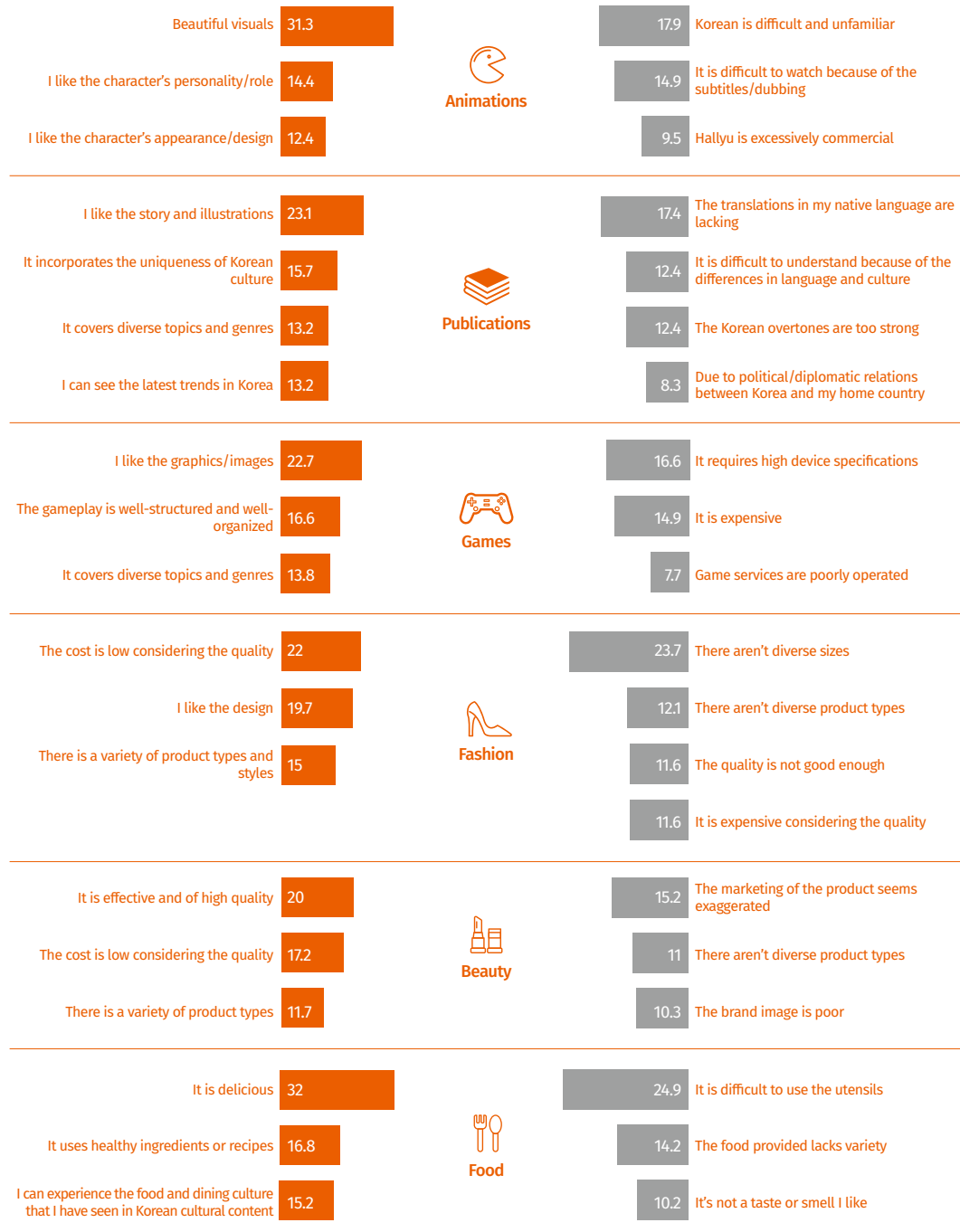




Africa

Africa showed similar results to Europe, as in the 2018 and 2019 surveys. The uniqueness of Korean culture was a key popularity factor for videos, music, and publications, and the difficulty in using or understanding the content due to language or cultural differences was a factor hindering favorability. Like the Middle East, games, fashion, beauty, and food showed similar results to other regions.





Preferred Hallyu Content

Five Regions

Top 3, Unit: %

Asia and Oceania			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 12.0	<i>Parasite</i> 13.6	<i>Battlegrounds</i> 20.3	Larva 16.9
<i>It's Okay Not to Be Okay</i> 4.8	<i>Train to Busan</i> 12.9	<i>Ragnarok</i> 12.4	Pororo 12.3
<i>The World of the Married</i> 4.1	<i>Peninsula</i> 5.1	<i>CrossFire</i> 9.5	Pinkfong 9.6
Americas			
Dramas	Movies	Games	Animation characters
<i>Kingdom</i> 4.8	<i>Parasite</i> 31.4	<i>CrossFire</i> 15.3	Pucca 31.9
<i>It's Okay Not to Be Okay</i> 4.4	<i>Train to Busan</i> 5.5	<i>Ragnarok/Battlegrounds</i> 13.8	Pororo 10.7
<i>The King: Eternal Monarch / A Piece of Your Mind/ Crash Landing on You/ Love Alarm</i> 2.7	<i>#Alive</i> 3.5	<i>Black Desert Online</i> 9.5	Pinkfong 7.5
Europe			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 3.8	<i>Parasite</i> 23.7	<i>Battlegrounds</i> 18.5	Pucca 15.4
<i>The Heirs</i> 2.9	<i>Train to Busan</i> 7.9	<i>Black Desert Online/ Ragnarok</i> 9.5	Pororo 13.3
<i>Hotel del Luna</i> 2.7	<i>#Alive</i> 2.1	<i>CrossFire</i> 8.4	Kongsuni 8.1

Middle East			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 9.5	<i>Parasite</i> 14.2	<i>Black Desert Online</i> 17.1	Pinkfong 12.9
<i>It's Okay Not to Be Okay</i> 3.3	<i>Train to Busan</i> 7.9	<i>Battlegrounds</i> 14.4	Pucca 11.4
<i>The King: Eternal Monarch</i> 2.9	<i>Time to Hunt</i> 3.8	<i>Summoners War/ Dungeon Fighter Online</i> 8.6	Pororo 9.0

Africa			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 13.6	<i>Parasite</i> 13.3	<i>Gunship Battle</i> 14.4	Pinkfong 17.4
<i>Kingdom</i> 5.8	<i>Time to Hunt</i> 6.6	<i>Battlegrounds</i> 9.9	Shinbi (The Haunted House) 10.0
<i>It's Okay Not to Be Okay</i> 3.9	<i>Train to Busan</i> 5.7	<i>Ragnarok/ Dungeon Fighter Online</i> 8.8	Larva 9.5

Asia and Oceania

The countries in Asia and Oceania recorded similar preference rankings for all contents except dramas. Older dramas remained popular in China and Japan, whereas both newer and older dramas were popular in Thailand, Indonesia, and Vietnam. The remaining countries mostly showed a high preference for newer dramas. Particularly, *Crash Landing on You* was so popular that it broke into the top 3 in all countries and claimed first in five countries. Along with this drama, *It's Okay to Not Be Okay*, *Kingdom*, *The World of the Married*, and *Itaewon Class* also ranked relatively high in preference. These dramas were all distributed on Netflix, indicating the powerful ripple effects of global OTTs in the video content industry.

As for movies, *Parasite* and *Train to Busan* claimed first and second in most countries, similar to the 2019 survey; *Parasite* topped the list in six countries including Japan, while *Train to Busan* scored the highest preference in four countries including China. In Japan, though *Parasite* was not included in the 2019 rankings, it likely exploded in popularity after its local release in January 2020 and winning four Academy Awards. Moreover, *A Moment to Remember*, the only film from the 2000s in the region, made it into the top rankings, indicating the preference for older films. Similar to dramas, Netflix-distributed movies such as *Train to Busan*, *#Alive*, *Peninsula*, *Intruder*, and *Time to Hunt* scored high ranks in most countries.

In terms of games, *Battlegrounds* and *Ragnarok* demonstrated their popularity for the second consecutive year. *Battlegrounds* topped the ranking in six countries and *Ragnarok* in three countries, displaying their duopoly on Korean games.

Regarding animation characters, Larva showed the highest preference, ranking first in six countries including China. Pororo was the most popular in Japan, while Pinkfong claimed first in India and Australia.

Top 3, Unit: %

China			
Dramas	Movies	Games	Animation characters
<i>My Love from the Star / Daejanggeum/ Flower of Evil</i> 7.3	<i>Train to Busan</i> 18.7	<i>Battlegrounds</i> 30.8	Larva 15.1
<i>Reply 1988</i> 5.3	<i>Parasite</i> 9.7	<i>CrossFire</i> 27.8	Super Wings 12.3
<i>Crash Landing on You/ Descendants of the Sun</i> 5.0	<i>Intruders</i> 2.7	<i>Dungeon Fighter Online</i> 11.5	Pororo 10.8

Japan			
Dramas	Movies	Games	Animation characters
<i>Winter Sonata</i> 12.5	<i>Parasite</i> 17.4	<i>Battlegrounds</i> 16.7	Pororo 14.2
<i>Crash Landing on You</i> 7.5	<i>Train to Busan</i> 5.0	<i>Lineage</i> 13.0	Super Wings/ Larva/ Cocomong 8.5
<i>Daejanggeum</i> 5.4	<i>A Moment to Remember</i> 2.8	<i>Summoners War</i> 9.4	Pinkfong/ Animals/ Shinbi (The Haunted House)/Tobot 6.6

Taiwan			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 11.1	<i>Train to Busan</i> 33.8	<i>Ragnarok</i> 18.6	Larva 19.2
<i>It's Okay Not to Be Okay</i> 9.0	<i>Parasite</i> 8.9	<i>KartRider</i> 17.4	Robocar Poli 15.0
<i>Itaewon Class</i> 6.5	<i>Along With the Gods</i> 5.8	<i>Lineage</i> 17.0	Pororo 14.2

Thailand			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 10.5	<i>Train to Busan</i> 11.9	<i>Ragnarok</i> 34.1	Larva 18.0
<i>Daejanggeum</i> 7.0	<i>Peninsula</i> 7.0	<i>Point Blank</i> 10.5	Pororo 17.7
<i>The King: Eternal Monarch / Kingdom</i> 4.5	<i>Parasite</i> 5.5	<i>Summoners War</i> 8.9	Pucca 14.7

Malaysia			
Dramas	Movies	Games	Animation characters
<i>It's Okay Not to Be Okay</i> 12.1	<i>Parasite/ Train to Busan/ Peninsula</i> 15.2	<i>Battlegrounds</i> 27.6	Larva 25.2
<i>Crash Landing on You</i> 8.3	<i>#Alive</i> 8.5	<i>MapleStory</i> 12.1	Pororo 13.5
<i>The World of the Married</i> 6.5	<i>Intruders</i> 2.1	<i>Ragnarok</i> 10.6	Pinkfong 9.1

Indonesia			
Dramas	Movies	Games	Animation characters
<i>The World of the Married</i> 15.5	<i>Parasite</i> 11.1	<i>Battlegrounds/ EOS RED</i> 32.6	Larva 27.4
<i>Crash Landing on You</i> 12.5	<i>Train to Busan</i> 9.0	<i>Point Blank/ KartRider</i> 17.6	Tayo/ Pororo 14.1
<i>Boys over Flowers</i> 6.8	<i>Peninsula</i> 8.1	<i>Ragnarok</i> 12.1	Pinkfong 8.7

India			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 21.0	<i>Parasite</i> 22.2	<i>Battlegrounds</i> 23.4	Pinkfong 18.7
<i>Kingdom</i> 5.5	<i>Peninsula</i> 7.5	<i>Gunship Battle</i> 12.5	Super Wings 10.7
<i>It's Okay Not to Be Okay</i> 4.6	<i>Time to Hunt</i> 5.8	<i>CrossFire</i> 12.1	Pororo 8.7

Vietnam			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 20.0	<i>Parasite</i> 15.8	<i>Battlegrounds/ Summoners War</i> 15.5	Larva 20.0
<i>Itaewon Class</i> 7.1	<i>Train to Busan</i> 4.3	<i>CrossFire</i> 14.2	Pucca 15.9
<i>Descendants of the Sun</i> 3.7	<i>Peninsula</i> 2.0	<i>Dungeon Fighter Online</i> 10.2	Pinkfong 15.5

Australia			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 15.5	<i>Parasite</i> 22.2	<i>Ragnarok</i> 11.5	Pinkfong 15.2
<i>Kingdom</i> 4.9	<i>Train to Busan</i> 7.2	<i>Black Desert Online/ Summoners War / Battlegrounds</i> 9.7	Pororo 12.1
<i>Hospital Playlist</i> 4.2	<i>Peninsula</i> 2.2	<i>Dungeon Fighter Online</i> 8.0	Pucca 9.8

Americas

Within the Americas, North and South America differed in terms of preferred content and concentration. *Crash Landing on You* was the most preferred drama in the US, whereas *It's Okay to Not Be Okay* topped the list in Brazil and Argentina. Argentine respondents in particular displayed a preference for older dramas such as *Stairway to Heaven* and *Boys Over Flowers*. Regarding movies, *Parasite* and *Train to Busan* ranked first and second in all three countries in the Americas; however, *Parasite's* preference rating in Brazil and Argentina doubled that in the US, showing a huge difference in concentration. *Peninsula* and *#Alive* also made the rankings, indicating the strong influence of Netflix-distributed titles in the Americas' video content market.

Meanwhile, *CrossFire* was the most popular game in Brazil and Argentina, while *Battlegrounds* was most preferred by US respondents. Pucca and Pororo were popular animation characters; particularly in South America, Pucca displayed overwhelming popularity with an average preference rating above 40%.

Argentina			
Dramas	Movies	Games	Animation characters
<i>It's Okay Not to Be Okay/ Stairway to Heaven</i> 5.7	<i>Parasite</i> 35.0	<i>CrossFire</i> 16.0	Pucca 40.0
<i>Kingdom</i> 4.6	<i>Train to Busan</i> 7.3	<i>Ragnarok</i> 13.6	Pororo 9.8
<i>Boys over Flowers/ The King: Eternal Monarch</i> 4.0	<i>#Alive</i> 5.6	<i>Battlegrounds</i> 10.8	Pinkfong 6.2

Top 3, Unit: %

US			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 5.1	<i>Parasite</i> 16.6	<i>Battlegrounds</i> 12.2	Pororo 10.8
<i>Kingdom</i> 3.7	<i>Train to Busan</i> 4.1	<i>Black Desert Online</i> 11.6	Larva 9.8
<i>Hospital Playlist</i> 2.9	<i>Peninsula</i> 2.6	<i>Dungeon Fighter Online</i> 11.0	Shinbi (The Haunted House) 8.2

Brazil			
Dramas	Movies	Games	Animation characters
<i>Kingdom/ A Piece of Your Mind</i> 5.7	<i>Parasite</i> 37.6	<i>CrossFire</i> 20.4	Pucca 31.6
<i>It's Okay Not to Be Okay</i> 4.3	<i>Train to Busan</i> 4.6	<i>Ragnarok</i> 18.5	Pororo 11.7
<i>Love Alarm</i> 3.8	<i>#Alive</i> 3.5	<i>Battlegrounds</i> 18.0	Super Wings 10.1

Europe

Similar to 2019, the European countries showed similar preference trends for all contents except dramas. The first-place drama in each country varied; the only commonly popular drama was *Kingdom*, which made the top 3 in France, the UK, and Russia. As for movies, *Parasite* and *Train to Busan* were overwhelmingly popular in Europe as well. One noteworthy result is that the 2003 film *Oldboy* ranked third in France.

Regarding games, *Battlegrounds* ranked first in all four countries, even exceeding a 30% preference rating in Turkey. *Black Desert Online* and *Ragnarok* also proved very popular, making the rankings of four and three countries, respectively. Meanwhile, Pucca was the most popular animation character in France, the UK, and Turkey, and Pororo topped the list in Russia. Pinkfong and Super Wings were also included in the rankings of two countries.

Top 3, Unit: %

France			
Dramas	Movies	Games	Animation characters
<i>Misaeng/ Mr. Sunshine</i> 5.4	<i>Parasite</i> 19.3	<i>CrossFire/ Ragnarok/ Battlegrounds</i> 11.4	Pucca 20.1
<i>Kingdom/ Crash Landing on You/ Love Alarm</i> 2.0	<i>Train to Busan</i> 8.2	<i>Dungeon Fighter Online</i> 10.2	Super Wings/ Kongsuni 9.2
<i>Stranger and 4 other works</i> 1.3	<i>Oldboy</i> 2.5	<i>Black Desert Online</i> 8.0	Pororo/ Shinbi (The Haunted House) 8.2

UK			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 11.0	<i>Parasite</i> 25.9	<i>Battlegrounds</i> 17.1	Pucca 15.3
<i>It's Okay Not to Be Okay</i> 4.7	<i>Train to Busan</i> 4.5	<i>Dungeon Fighter Online/ Ragnarok</i> 11.4	Pinkfong 11.4
<i>Kingdom</i> 3.9	<i>Steel Rain and 5 other works</i> 1.5	<i>Black Desert Online</i> 9.5	Pororo 9.7

Russia			
Dramas	Movies	Games	Animation characters
<i>The Heirs</i> 5.5	<i>Train to Busan</i> 20.0	<i>Black Desert Online/ Battlegrounds</i> 12.8	Pororo 32.5
<i>Strong Girl Bong-soon/ Memorist</i> 3.4	<i>Parasite</i> 16.9	<i>Lineage</i> 12.1	Robocar Poli 17.5
<i>Kingdom</i> 2.8	<i>#Alive and 4 other works</i> 1.9	<i>Ragnarok</i> 7.8	Pucca 8.4

Turkey			
Dramas	Movies	Games	Animation characters
<i>The King: Eternal Monarch</i> 6.3	<i>Parasite</i> 30.4	<i>Battlegrounds</i> 32.9	Pucca 16.7
<i>THE K2</i> 5.9	<i>#Alive</i> 4.6	<i>Point Blank</i> 10.8	Pinkfong 12.0
<i>Hotel del Luna</i> 5.4	<i>Flu/ Train to Busan</i> 2.7	<i>Black Desert Online/ CrossFire/ Seven Knights</i> 8.2	Super Wings 9.7

The Middle East and Africa

Respondents from the Middle East and Africa displayed similar preferences for Korean content. Regarding dramas, *Crash Landing on You* claimed the first rank in both regions, while *It's Okay to Not Be Okay* ranked second and third, respectively, indicating their high local popularity. Among movies, *Parasite* ranked first in both the Middle East and Africa, as in other regions.

Time to Hunt ranked third in the UAE and second in South Africa, showing a distinct result from other regions. Nevertheless, the trend of Netflix-distributed dramas and movies dominating the rankings held in the Middle East and Africa as well.

Although the top title in each region differed (*Black Desert Online* and *Gunship Battle*), their preference trends were somewhat similar in that both rankings included *Battlegrounds* and *Dungeon Fighter Online*. Meanwhile, Pinkfong was the most popular animation character in both the UAE and South Africa, a distinct result from other regions.

Top 3, Unit: %

UAE			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 9.5	<i>Parasite</i> 14.2	<i>Black Desert Online</i> 17.1	Pinkfong 12.9
<i>It's Okay Not to Be Okay</i> 3.3	<i>Train to Busan</i> 7.9	<i>Battlegrounds</i> 14.4	Pucca 11.4
<i>The King: Eternal Monarch</i> 2.9	<i>Time to Hunt</i> 3.8	<i>Summoners War / Dungeon Fighter Online</i> 8.6	Pororo 9.0

South Africa			
Dramas	Movies	Games	Animation characters
<i>Crash Landing on You</i> 13.6	<i>Parasite</i> 13.3	<i>Gunship Battle</i> 14.4	Pinkfong 17.4
<i>Kingdom</i> 5.8	<i>Time to Hunt</i> 6.6	<i>Ragnarok / Battlegrounds</i> 9.9	Shinbi (The Haunted House) 10.0
<i>It's Okay Not to Be Okay</i> 3.9	<i>Train to Busan</i> 5.7	<i>Dungeon Fighter Online</i> 8.8	Larva 9.5

Preferred Hallyu Stars

Five Regions

Top 5, Unit: %

	Singers		Actors
Asia and Oceania	BLACKPINK	17.3	Lee Min-ho 11.6
	BTS	16.6	Hyun Bin 3.6
	TWICE	4.1	Song Hye-kyo 3.2
	Girls' Generation	3.2	Gong Yoo 2.7
	BIGBANG	3.1	Kim Soo-hyun 2.5
Americas	BTS	32.3	Lee Min-ho 5.7
	BLACKPINK	10.8	Hyun Bin 3.4
	PSY	3.6	Lee Jong-suk 2.5
	EXO	1.8	Gong Yoo 2.3
	Kim Yo-han	1.1	Suzy 1.9
Europe	BTS	25.7	Lee Min-ho 7.6
	BLACKPINK	7.9	Hyun Bin 2.7
	PSY	5.7	Lee Jong-suk 2.2
	EXO	1.8	Park Shin-hye 1.8
	Stray Kids /G-Dragon	0.9	Ji Chang-wook 1.7
Middle East	BTS	29.2	Lee Min-ho 13.3
	BLACKPINK	8.4	Hyun Bin 3.8
	PSY/ Sulli	3.0	Gong Yoo/ Kim Soo-hyun 3.3
	EXO	2.5	Ji Chang-wook 2.8
	Rain	1.5	Park Shin-hye/ Song Hye-kyo 2.0
Africa	BTS	25.3	Lee Min-ho 7.8
	BLACKPINK	6.6	Hyun Bin 6.5
	PSY	6.0	Suzy 4.8
	G-Dragon	2.7	Gong Yoo 2.8
	EXO	2.2	Park Shin-hye/ Ji Chang-wook 2.5

Asia and Oceania

In Asia and Oceania, the most preferred Korean singers overall were BTS and BLACKPINK, while second-generation K-Pop idols still retained considerable popularity in some countries such as China and Japan. BTS claimed first place in four countries, including Australia, while BLACKPINK ranked first in three Southeast Asian countries. Chinese respondents preferred idols who debuted somewhat earlier, such as EXO, G-Dragon, Girls' Generation, and BIGBANG. Japan showed a similar trend with KARA and Girls' Generation, who ranked third and fourth; however, the relatively newer groups BTS, TWICE, and BLACKPINK were also included in the rankings, showing a slightly different pattern from China. Moreover, non-Korean members of multinational K-Pop groups gained more popularity in their home countries.

Lee Min-ho was the most popular actor in all countries except those in East Asia. Chinese and Japanese respondents preferred actors who have been locally popular for quite some time, as was the case for K-Pop. Kim Hee-sun, Jun Ji-hyun, Song Joong-ki, and Song Hye-kyo topped the rankings in China, while Bae Yong-joon, Jang Geun-suk, Choi Ji-woo, and Lee Byung-hun remained popular in Japan.

Top 5, Unit: %

	China	Japan	Taiwan
Singers	EXO	BTS	TWICE
	G-Dragon	TWICE	BTS
	Girls' Generation	KARA	IU
	BIGBANG	Girls' Generation	Girls' Generation
	IU	BLACKPINK	BIGBANG/BLACKPINK
Actors	Kim Hee-sun	Bae Yong-joon	Gong Yoo
	Jun Ji-hyun	Jang Keun-suk	Hyun Bin
	Lee Min-ho	Choi Ji-woo	Lee Min-ho
	Song Joong-ki	Lee Min-ho	Jun Ji-hyun
	Song Hye-kyo	Lee Byung-hun	Park Seo-joon

	Thailand	Malaysia	Indonesia
Singers	BLACKPINK	BLACKPINK	BLACKPINK
	GOT7	BTS	BTS
	Lisa	TWICE	IU/Super Junior
	BTS	BIGBANG	EXO
	BIGBANG	PSY	NCT/Rain/Girls' Generation
Actors	Lee Min-ho	Lee Min-ho	Lee Min-ho
	Gong Yoo	Lee Jong-suk	Kim Soo-hyun
	Song Joong-ki	IU	Song Hye-kyo
	Hyun Bin	Lee Kwang-soo / Hyun Bin	Song Joong-ki
	Rain	Gong Yoo	Hyun Bin

	India	Vietnam	Australia
Singers	BTS	BTS	BTS
	PSY	BLACKPINK	BLACKPINK
	Nancy/Sulli	BIGBANG	PSY
	Suga/G-Dragon	Girls' Generation	Sulli
	IU	IU	G-Dragon
Actors	Lee Min-ho	Lee Min-ho	Lee Min-ho
	Hyun Bin	Song Hye-kyo	Hyun Bin
	Suzy/ji Chang-wook	Rain	Gong Yoo
	Park Shin-hye/Lee Jong-suk	Jang Dong-gun	Suzy
	Kim Soo-hyun	Yoona	Song Hye-kyo/Lee Jong-suk

Americas

BTS displayed overwhelming popularity in the Americas, and BLACKPINK also recorded a relatively high preference rating. Particularly, 27.1% of US respondents preferred BTS, up 10%p from 2019. Brazil also showed a similar increase.

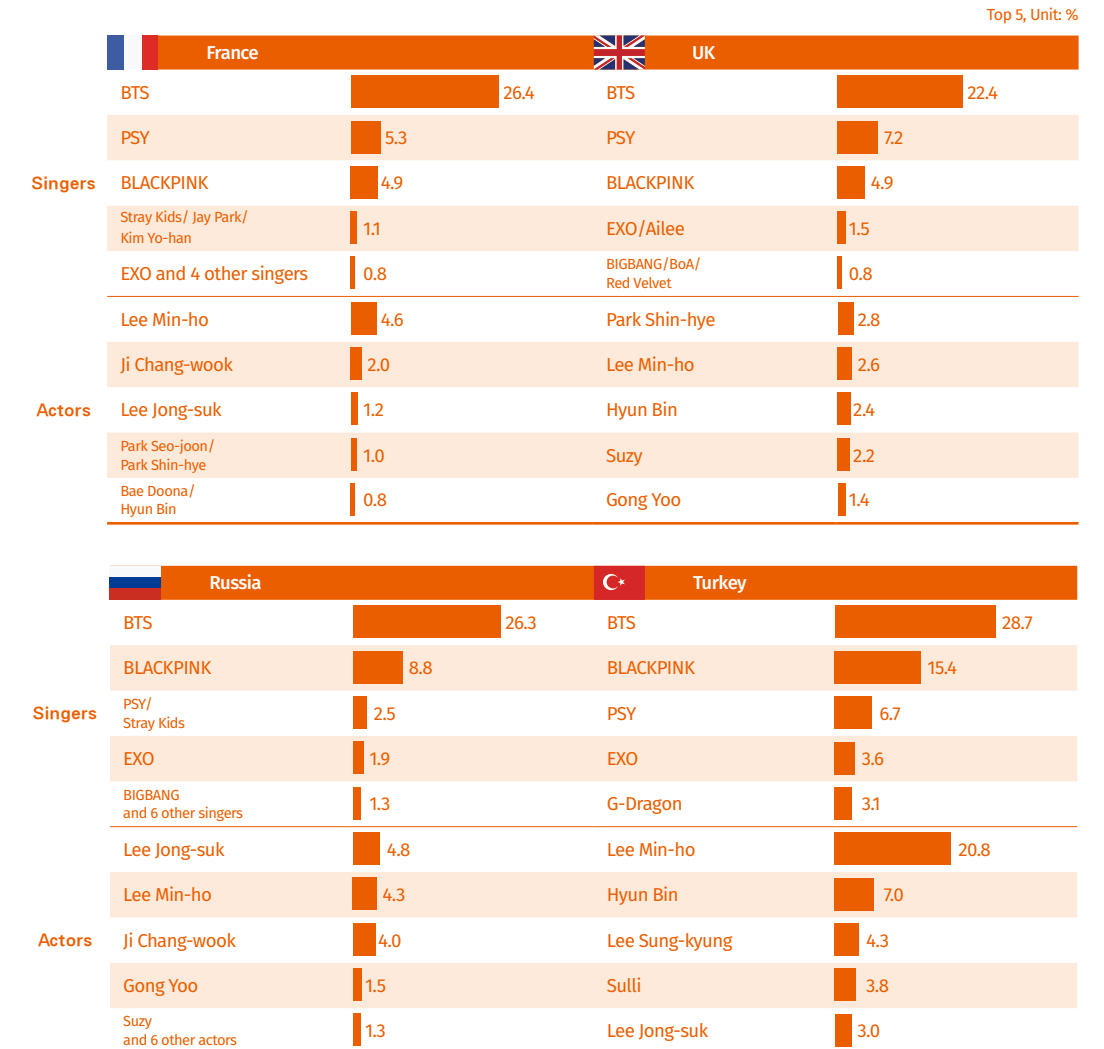
In Argentina, which was first surveyed in 2020, over 30% of respondents indicated a preference for BTS. BLACKPINK ranked second in all three countries, though the gap with BTS was considerably wide. The preference for Korean actors differed between North and South America; Hyun Bin claimed first place in the US due to the influence of *Crash Landing on You*, while Lee Min-ho held onto first place in Brazil and Argentina. Additionally, Lee Jong-suk was relatively popular in South America.



Europe

BTS was the most popular K-Pop group in Europe as well, with all four countries recording a higher preference rating than 2019. The ratings in France, the UK, and Turkey increased by about 6%p, 4%p, and 10%p, and Russia's doubled, indicating BTS' growth in popularity from 2019. PSY and BLACKPINK followed in preference after BTS, though like the Americas, there was a sizeable gap with first place.

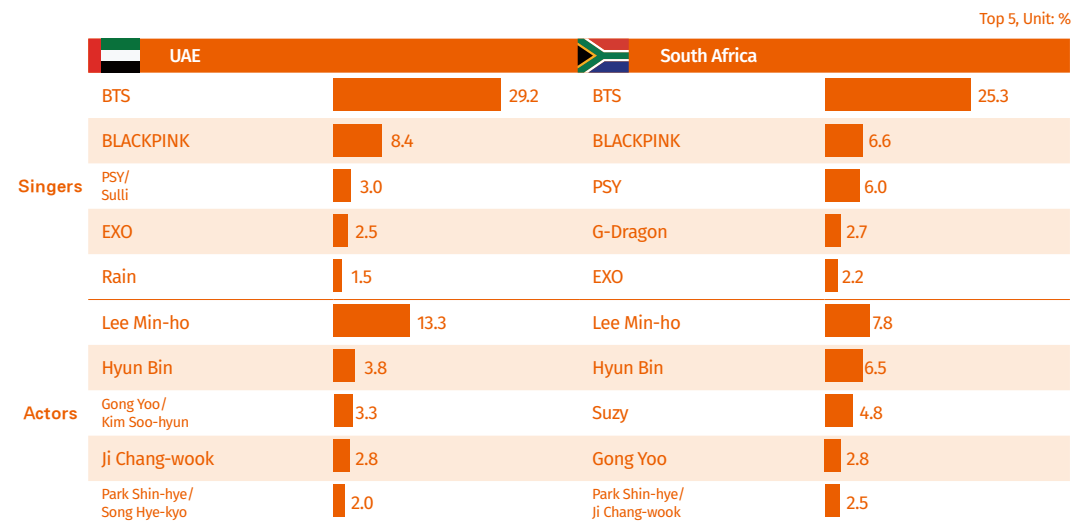
As for actors, Lee Min-ho, Park Shin-hye, and Lee Jong-suk all achieved high ratings, with Lee Min-ho displaying overwhelming popularity in Turkey. His rating increased by 8.3%p from 2019, suggesting that his Netflix drama *The King: Eternal Monarch* was hugely popular among locals.



The Middle East and Africa

BTS was the most preferred K-Pop group in the Middle East and Africa as well, with a large rise in preference from 2019. The UAE recorded a preference rating of 29.2% for BTS, up a staggering 14%p from 2019, and South Africa increased by about 10%p to 25.3%. BTS was followed by PSY and BLACKPINK, similar to other regions.

Meanwhile, Lee Min-ho, Hyun Bin, Gong Yoo, Ji Chang-wook, and Park Shin-hye were popular actors in both regions; particularly in the UAE, Lee Min-ho was overwhelmingly more preferred than the other actors.

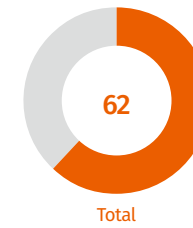


Brand Power Index of Hallyu Content

Five Regions

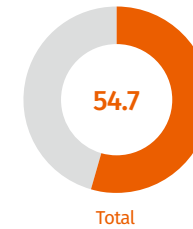
Unit: Points out of 100

Asia and Oceania



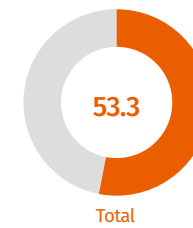
Food	69.6	Games	58.5
Beauty	66.8	Entertainment programs	61.2
Music	65.5	Animations	56.1
Fashion	65.4	Publications	54.8
Movies	64.6	Webtoons	54.9
Dramas	64.3		

Americas



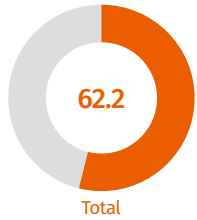
Food	60.0	Games	55.9
Beauty	56.5	Entertainment programs	50.0
Music	60.8	Animations	56.9
Fashion	55.4	Publications	50.9
Movies	56.6	Webtoons	48.4
Dramas	50.8		

Europe



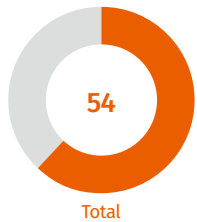
Food	60.2	Games	52.9
Beauty	56.6	Entertainment programs	49.3
Music	55.8	Animations	53.4
Fashion	54.0	Publications	50.5
Movies	54.6	Webtoons	48.4
Dramas	50.5		

Middle East



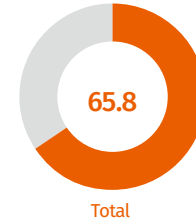
Food	65.0	Games	61.8
Beauty	67.1	Entertainment programs	60.8
Music	62.5	Animations	60.8
Fashion	65.2	Publications	57.7
Movies	63.9	Webtoons	58.1
Dramas	61.7		

Africa



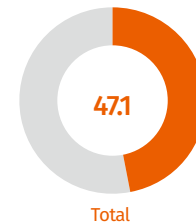
Food	61.1	Games	56.0
Beauty	56.7	Entertainment programs	50.1
Music	54.8	Animations	56.3
Fashion	57.5	Publications	48.7
Movies	55.5	Webtoons	46.3
Dramas	50.6		

China



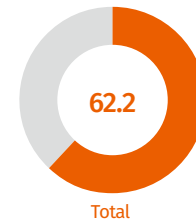
Food	70.2	Games	63.2
Beauty	71.1	Entertainment programs	66.0
Music	66.3	Animations	60.8
Fashion	69.2	Publications	60.7
Movies	68.3	Webtoons	59.7
Dramas	68.1		

Japan



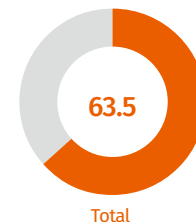
Food	63.7	Games	41.7
Beauty	52.3	Entertainment programs	41.1
Music	55.8	Animations	38.2
Fashion	48.6	Publications	38.5
Movies	48.5	Webtoons	37.7
Dramas	51.3		

Taiwan



Food	70.3	Games	60.2
Beauty	66.7	Entertainment programs	62.0
Music	63.4	Animations	54.6
Fashion	66.2	Publications	53.7
Movies	65.8	Webtoons	54.5
Dramas	66.4		

Thailand



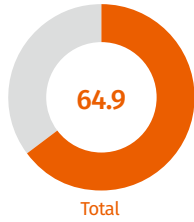
Food	69.4	Games	62.6
Beauty	68.3	Entertainment programs	62.2
Music	66.1	Animations	57.8
Fashion	68.0	Publications	57.5
Movies	65.7	Webtoons	58.0
Dramas	63.2		

Asia and Oceania

Following the Middle East, Asia and Oceania recorded the second-highest BPI among all regions. Korean food, beauty, music, and fashion in this region showed strong brand power, while that of animations, publications, and webtoons was relatively low.

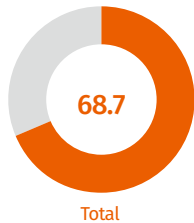
By country, the overall BPI for Hallyu content in Indonesia, Vietnam, and China was high, whereas that in Australia and Japan was low. Japan in particular recorded the lowest BPI among all 18 countries, and other than Korean food, most contents recorded the lowest level. Korean food recorded the highest BPI in most countries, though India was unique in that Korean movies and games showed the strongest brand power

 Malaysia



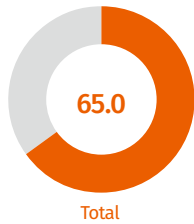
Food	75.9	Games	56.7
Beauty	73.1	Entertainment programs	67.8
Music	70.2	Animations	55.1
Fashion	70.9	Publications	51.8
Movies	69.6	Webtoons	52.8
Dramas	70.1		

 Indonesia



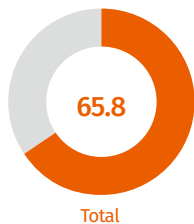
Food	74.6	Games	62.4
Beauty	72.8	Entertainment programs	68.6
Music	74.6	Animations	62.3
Fashion	72.1	Publications	59.8
Movies	72.7	Webtoons	61.8
Dramas	73.7		

 India



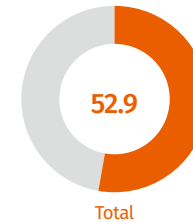
Food	65.8	Games	66.6
Beauty	66.1	Entertainment programs	64.3
Music	66.1	Animations	65.8
Fashion	65.8	Publications	63.3
Movies	66.7	Webtoons	61.5
Dramas	63.4		

 Vietnam



Food	72.4	Games	60.9
Beauty	73.7	Entertainment programs	65.4
Music	69.2	Animations	58.2
Fashion	71.8	Publications	58.0
Movies	68.2	Webtoons	57.9
Dramas	68.5		

 Australia



Food	62.5	Games	50.7
Beauty	54.6	Entertainment programs	51.0
Music	55.9	Animations	51.0
Fashion	54.0	Publications	48.2
Movies	54.0	Webtoons	48.6
Dramas	51.6		

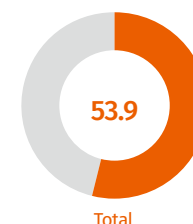
Americas

Among the five regions, the Americas recorded the third-highest BPI for Hallyu content. Nevertheless, this was about 4 points lower than the regional average, indicating that Hallyu content's brand power was relatively weak. As in Asia and Oceania, Korean food, music, and beauty brands showed strong brand power, with movies also recording high results. In contrast, dramas, entertainment programs, publications, and webtoons showed relatively low brand power.

By country, Brazil recorded the highest Hallyu content BPI in the region. Korean music showed strong brand power in South America, whereas Korean food recorded the highest BPI in North America, a unique result.

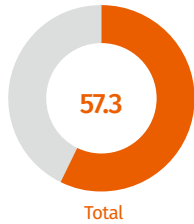
Unit: Points out of 100

 US



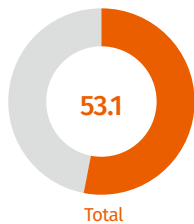
Food	62.5	Games	52.3
Beauty	55.8	Entertainment programs	51.8
Music	57.7	Animations	53.1
Fashion	54.9	Publications	50.4
Movies	53.3	Webtoons	49.7
Dramas	51.1		

Brazil



Food	59.1	Games	58.1
Beauty	58.8	Entertainment programs	53.7
Music	64.0	Animations	60.0
Fashion	57.1	Publications	53.6
Movies	60.1	Webtoons	50.3
Dramas	55.2		

Argentina



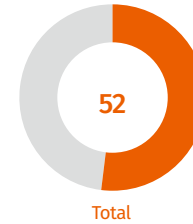
Food	58.3	Games	57.2
Beauty	54.8	Entertainment programs	44.6
Music	60.8	Animations	57.5
Fashion	54.2	Publications	48.7
Movies	56.4	Webtoons	45.1
Dramas	46.1		

Europe

Europe recorded the lowest Hallyu content BPI among all surveyed regions. The BPI for all content except food ranged from the 40s to the 50s, and dramas, entertainment programs, publications, and webtoons showed relatively lower scores. By country, Turkey recorded the highest BPI, while the UK recorded the lowest BPI after Japan. In Turkey, eight types of content scored above 60, while in the UK, only food, music, and beauty scored in the 50s and all other content scored in the 40s, displaying a stark contrast between the two countries. Notably in Russia, Korean food and beauty showed much higher BPIs than other content.

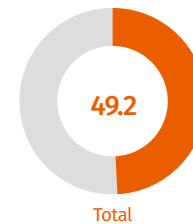
Unit: Points out of 100

France



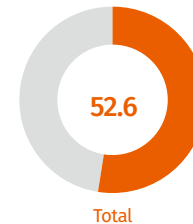
Food	57.3	Games	51.8
Beauty	51.2	Entertainment programs	48.8
Music	54.7	Animations	53.5
Fashion	51.3	Publications	50.5
Movies	53.8	Webtoons	49.8
Dramas	49.0		

UK



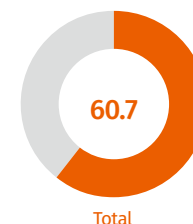
Food	56.4	Games	47.7
Beauty	50.7	Entertainment programs	46.2
Music	53.4	Animations	49.7
Fashion	49.3	Publications	47.1
Movies	49.3	Webtoons	45.9
Dramas	46.0		

Russia



Food	66.0	Games	50.8
Beauty	65.4	Entertainment programs	46.1
Music	53.0	Animations	50.6
Fashion	56.1	Publications	48.2
Movies	51.7	Webtoons	42.1
Dramas	48.2		

C* Turkey



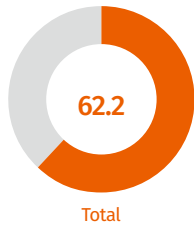
Food	62.8	Games	62.8
Beauty	61.9	Entertainment programs	56.9
Music	63.1	Animations	60.7
Fashion	61.2	Publications	57.3
Movies	65.1	Webtoons	56.1
Dramas	60.2		

The Middle East and Africa

Among all regions, the Middle East recorded the highest BPI for Hallyu content and Africa recorded the lowest after Europe, showing a distinct difference between the two regions. In both regions, Korean food, beauty, and fashion displayed strong brand power, while that of publications and webtoons was relatively weak.

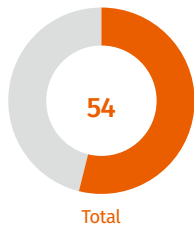
Unit: Points out of 100

UAE



Food	65.0	Games	61.8
Beauty	67.1	Entertainment programs	60.8
Music	62.5	Animations	60.8
Fashion	65.2	Publications	57.7
Movies	63.9	Webtoons	58.1
Dramas	61.7		

South Africa



Food	61.1	Games	56.0
Beauty	56.7	Entertainment programs	50.1
Music	54.8	Animations	56.3
Fashion	57.5	Publications	48.7
Movies	55.5	Webtoons	46.3
Dramas	50.6		

2 0 2 1
GLOBAL
HALLYU
TRENDS

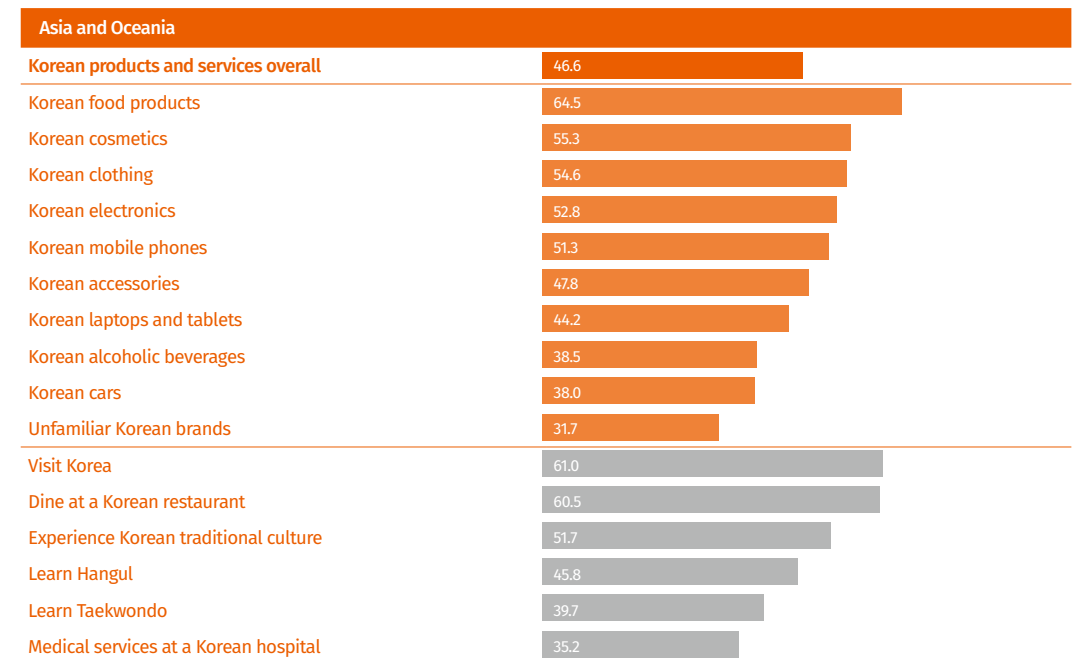
Ripple effects of Hallyu

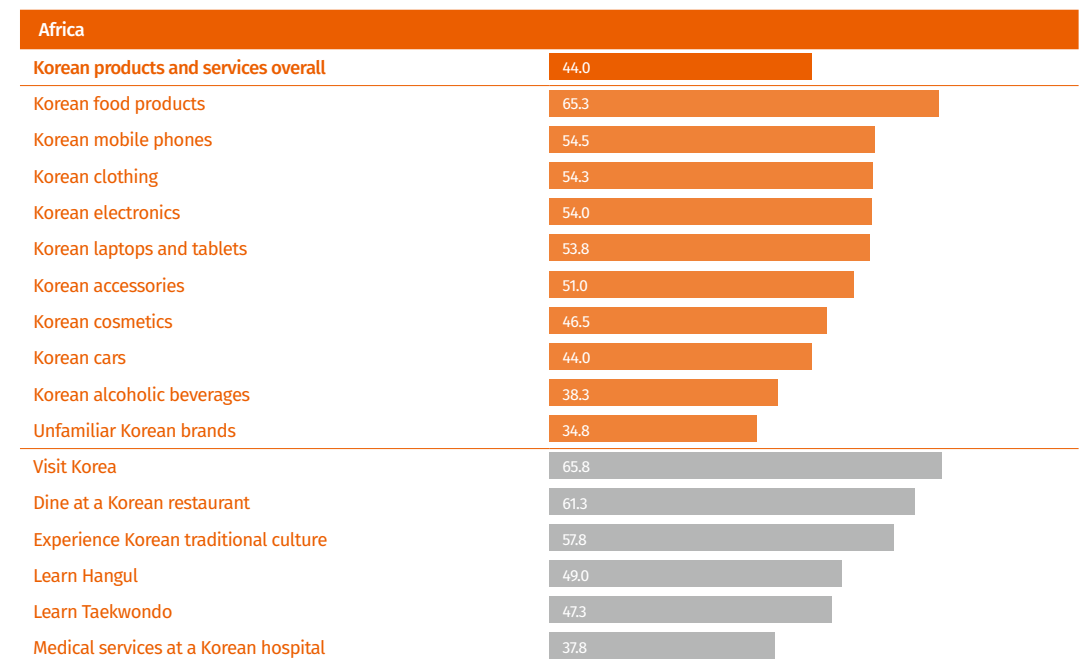
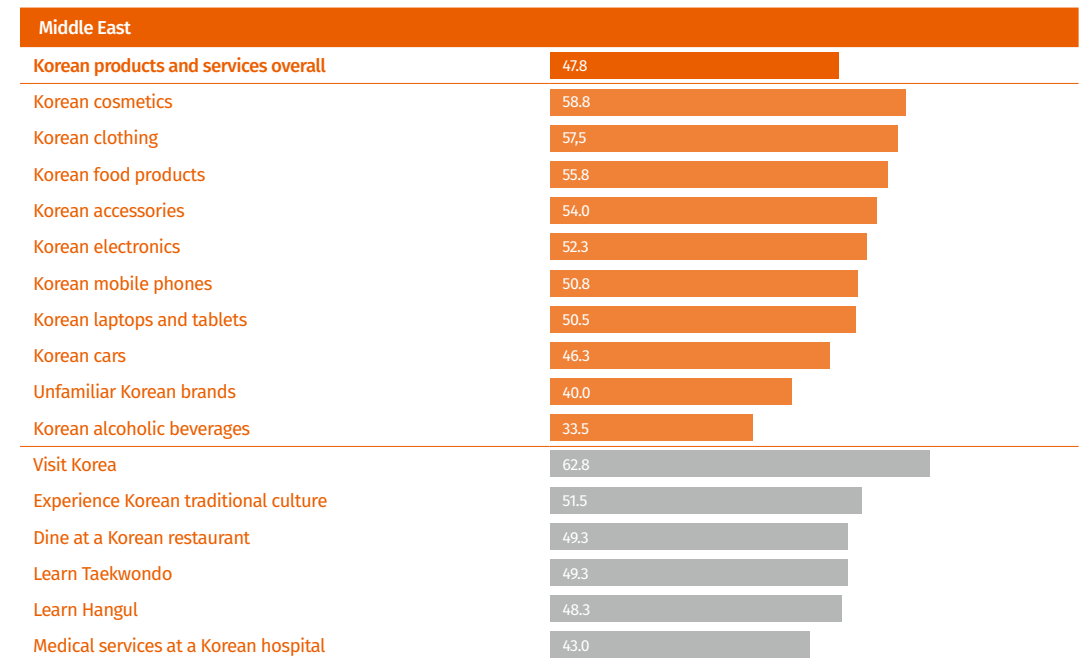
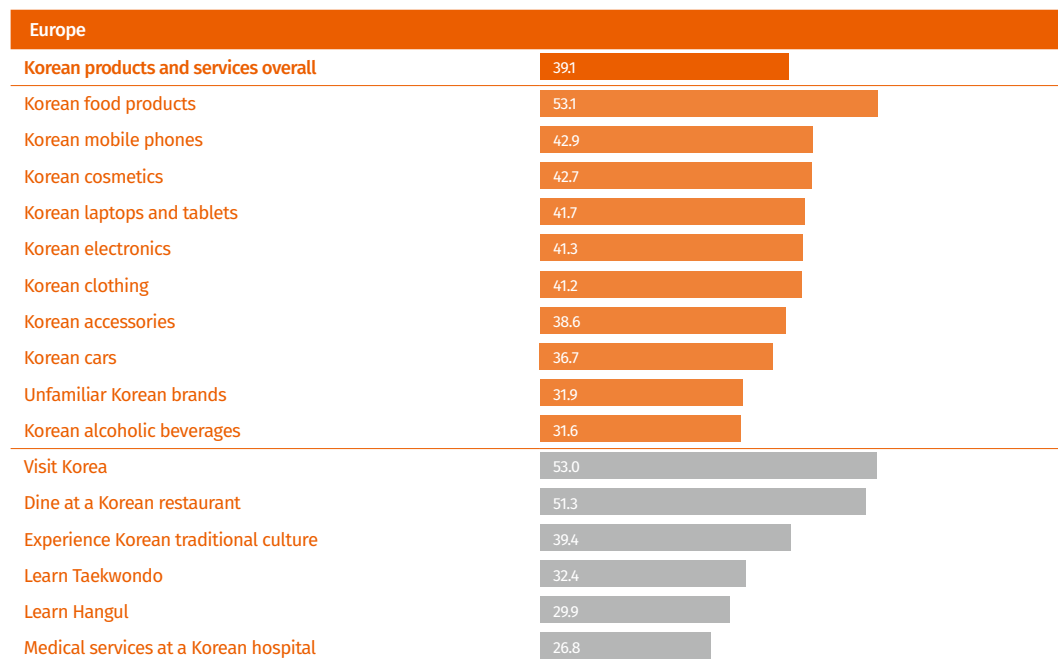
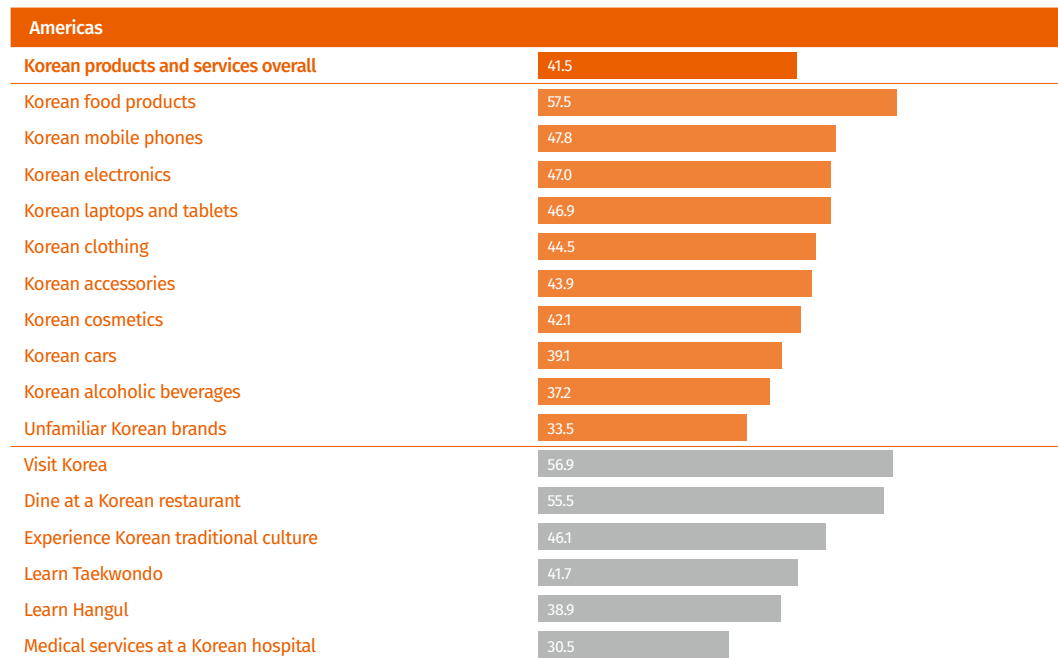
Intention to use Korean products and services in the future

Five Regions

According to the survey results, the intention to use Korean products and services in the future was highest in the Middle East for the second consecutive year, followed by Asia and Oceania, Africa, the Americas, and Europe. Among Korean products, the use intention for food was the highest, and among services, the intention to visit Korea was the highest. On the other hand, the use intentions for Korean alcoholic beverages and hospital medical services were the lowest in most regions.

(Top 2, Unit: %)



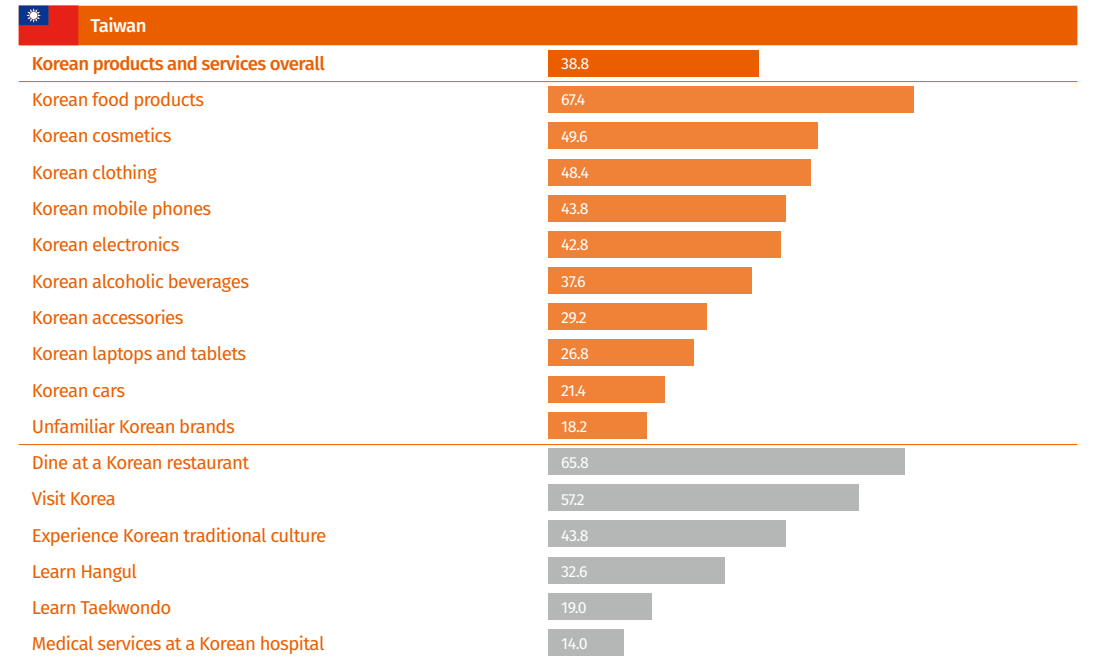
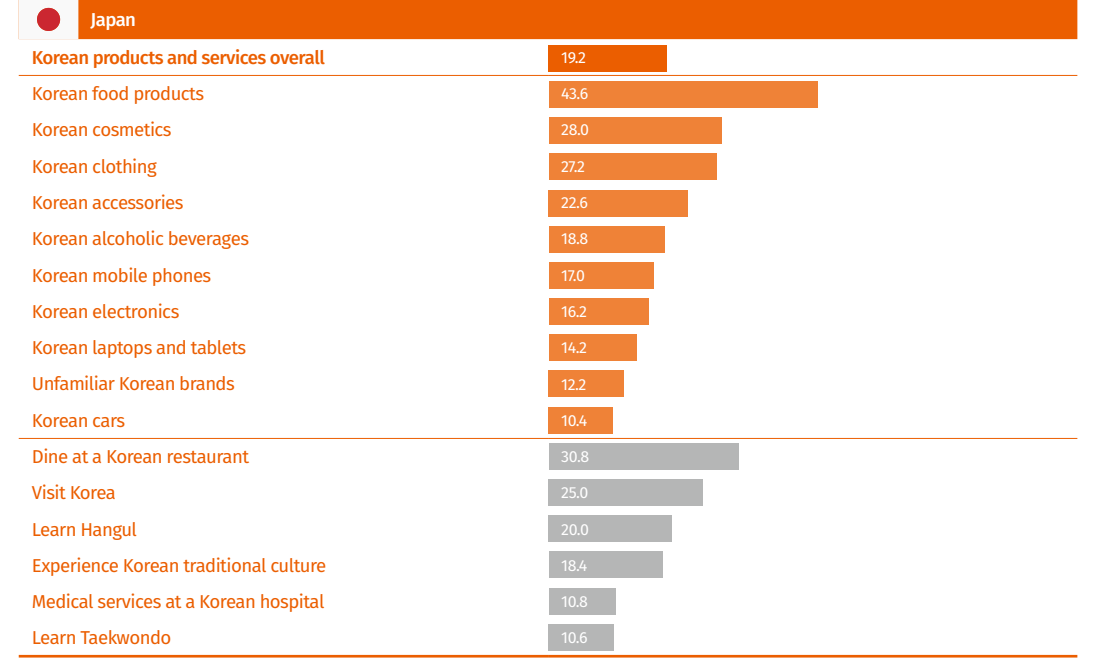
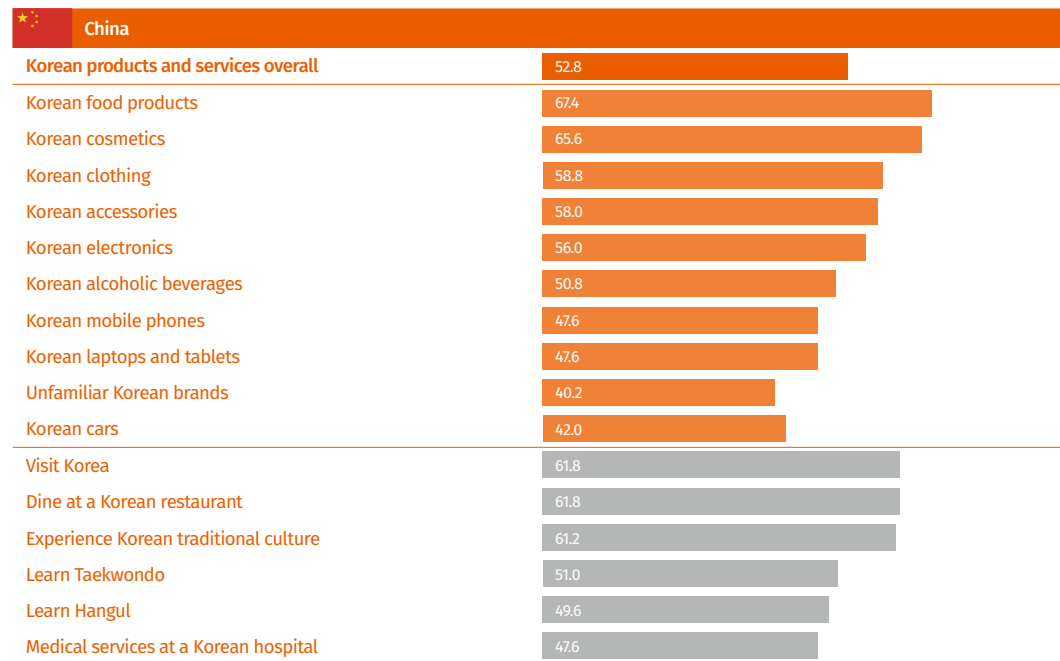


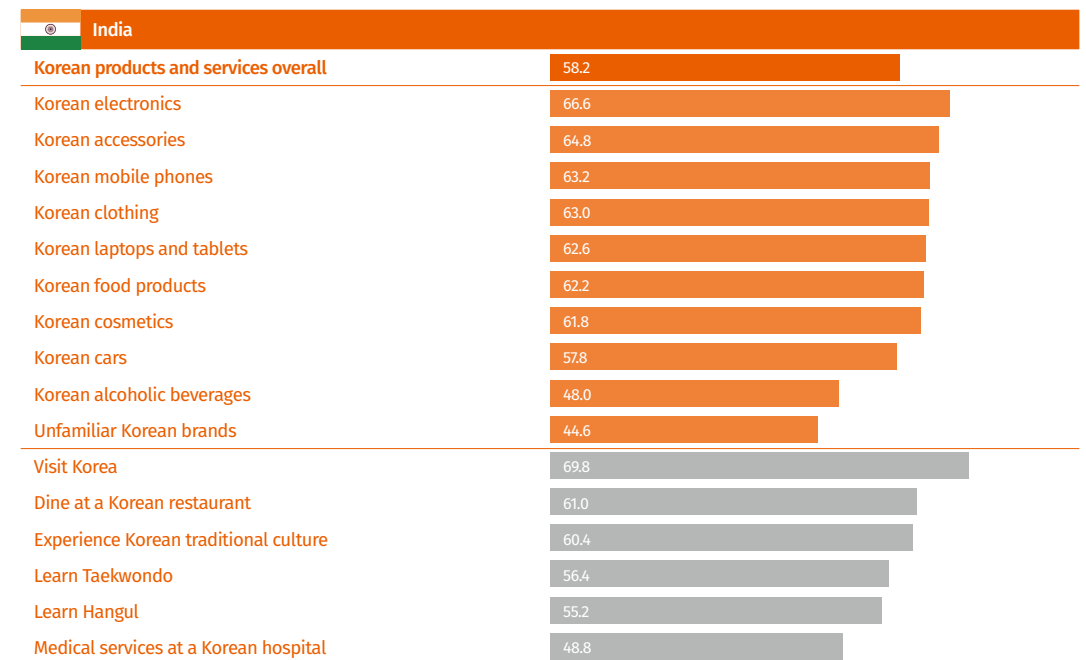
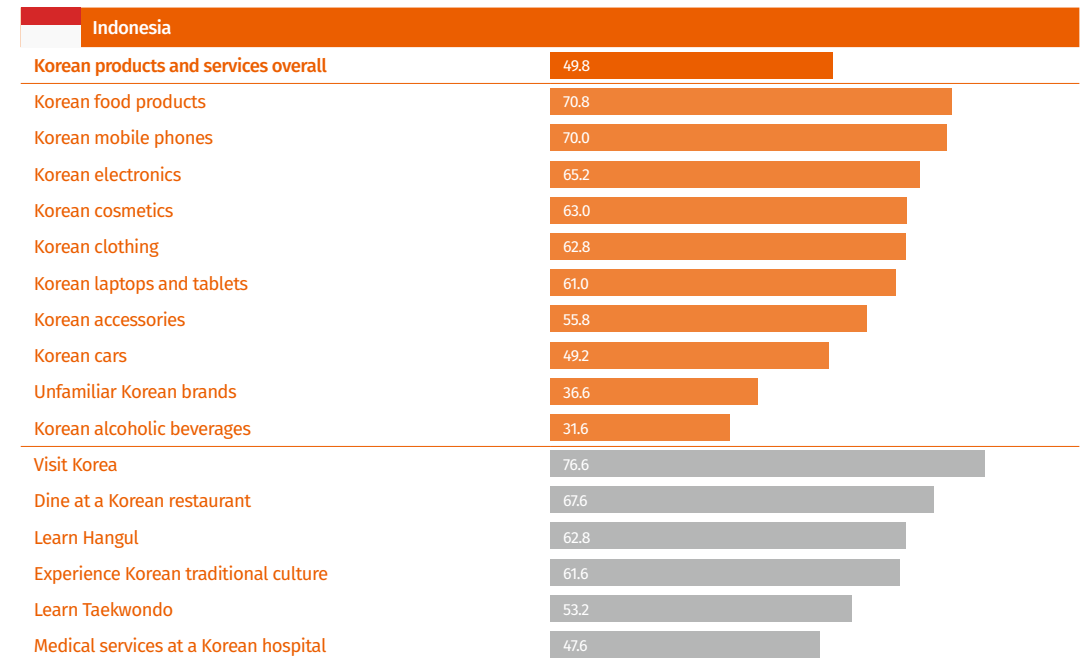
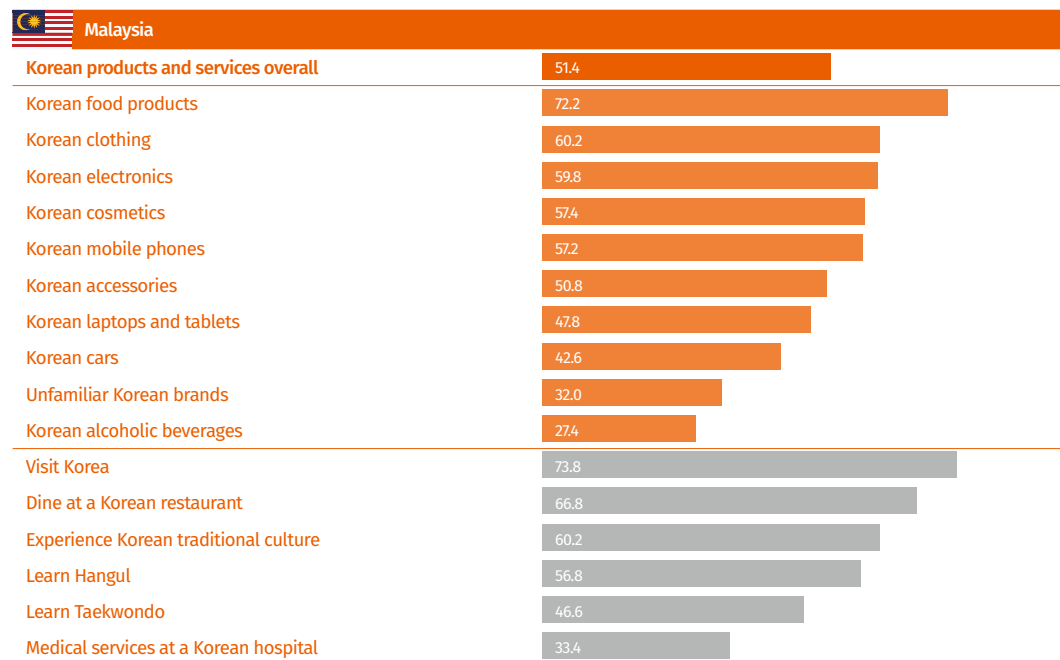
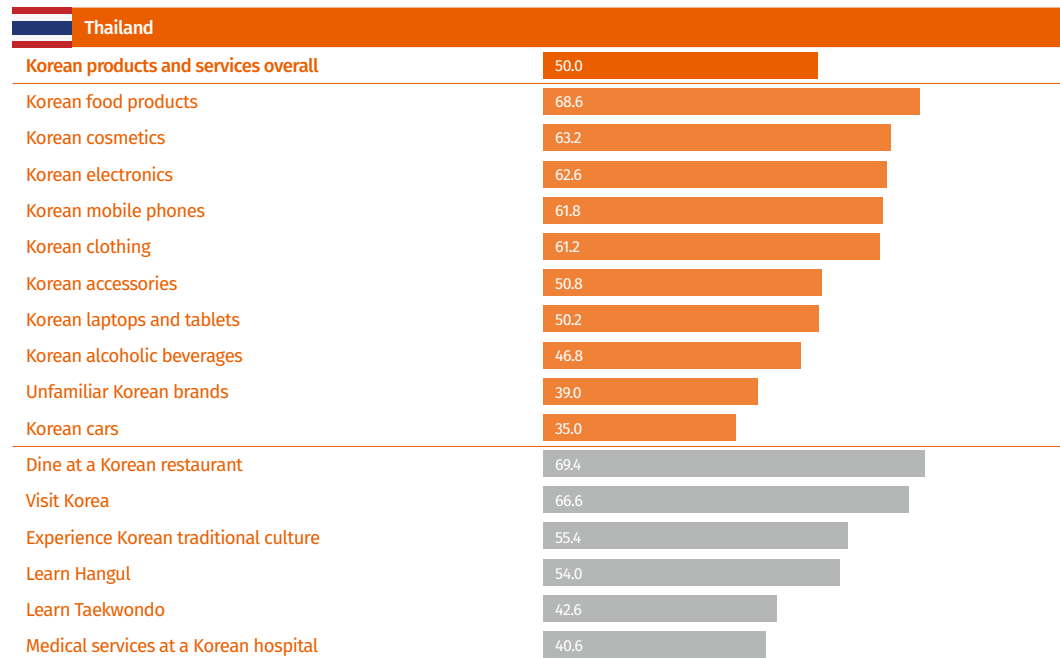
Asia and Oceania

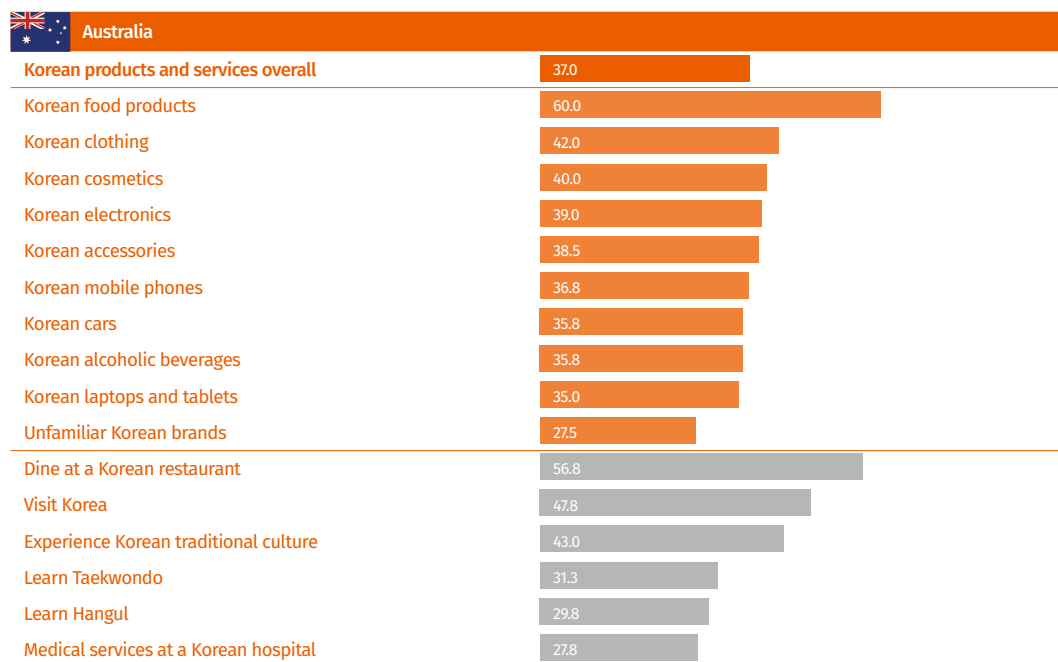
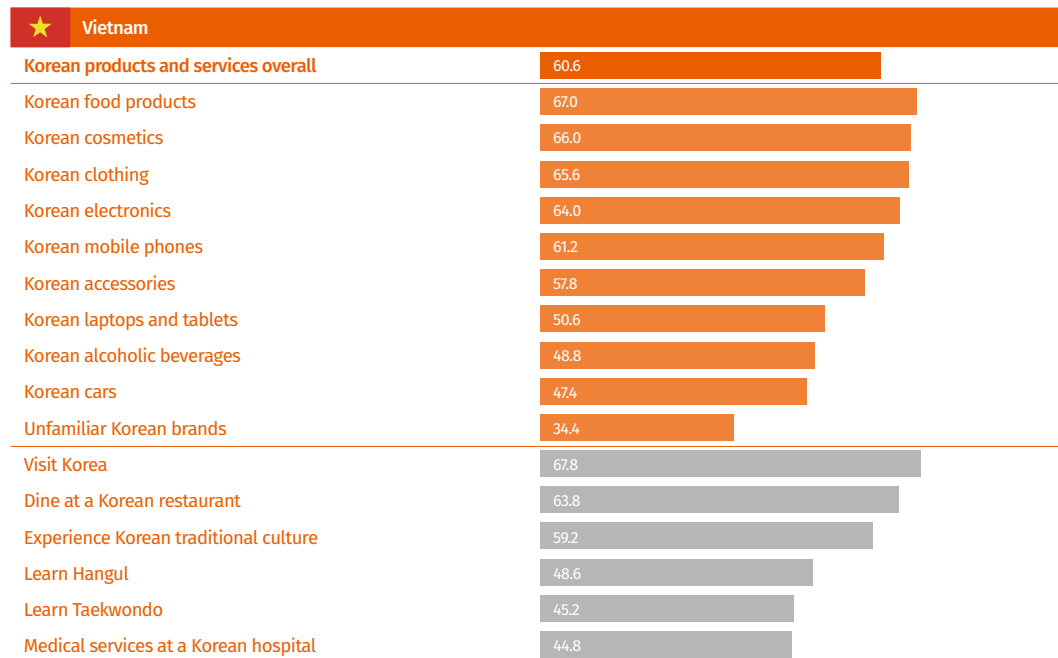
Of the five regions, Asia and Oceania showed the second-highest use intention for Korean products and services in the future. Among Korean products, the intention to use food, cosmetics, and clothing was generally high, and among services, the desire to visit Korea and dine at Korean restaurants was comparatively strong.

By country, respondents in China and Southeast Asia exhibited above-average use intention, whereas those in Japan and Australia showed below-average use intention. Japan, in particular, recorded the lowest use intention among all 18 countries for the second consecutive year, and except for purchasing Korean food and dining at Korean restaurants, all products and services recorded a low response rate at 10-20%. Nevertheless, the results were not entirely negative; the use intention for all products and services nearly doubled from 10.0% in 2019 to 19.2% in 2020. In contrast to Japan, Vietnam recorded the highest use intention for Korean products and services in this region for the second consecutive year, to the extent that 7 out of 17 products and services recorded a response rate over 60%.

(Top 2, Unit: %)



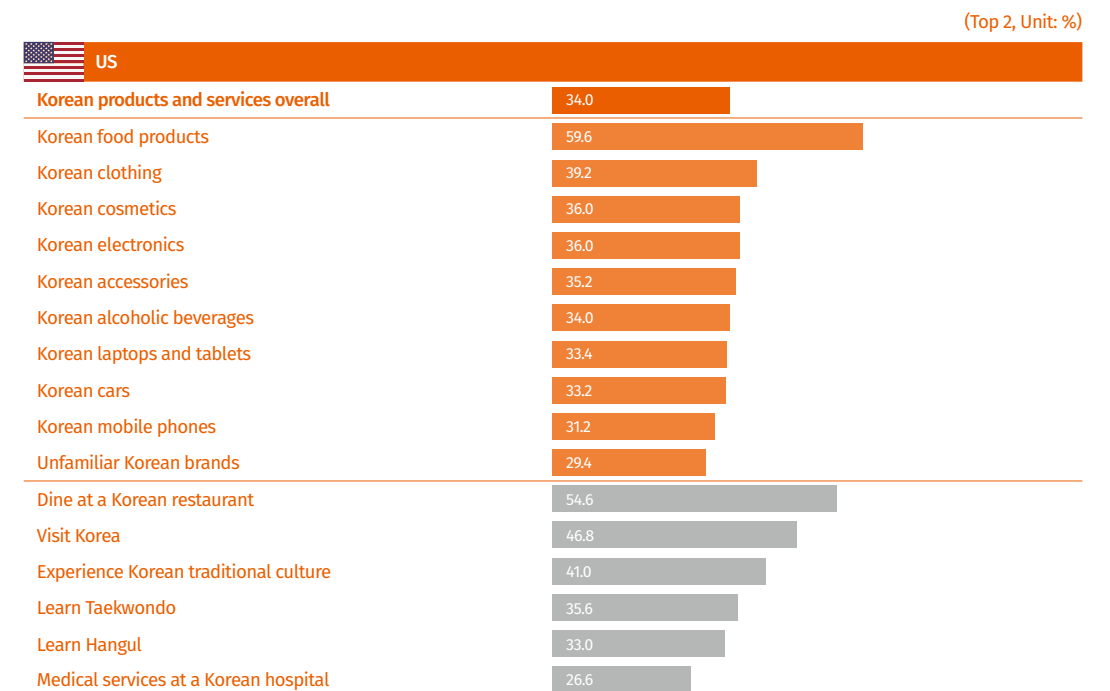


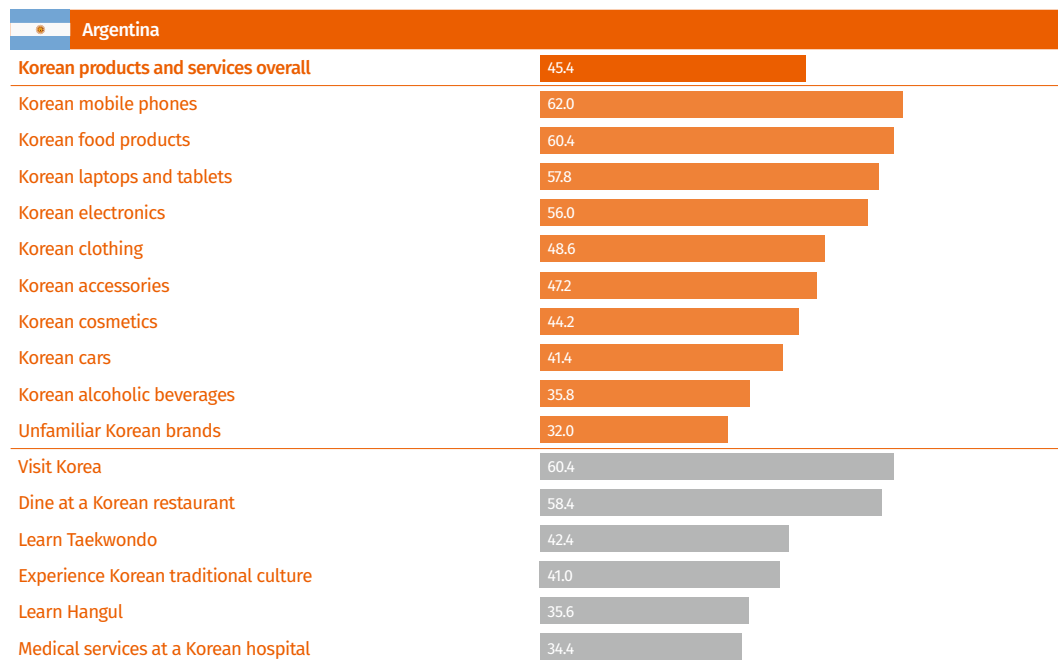
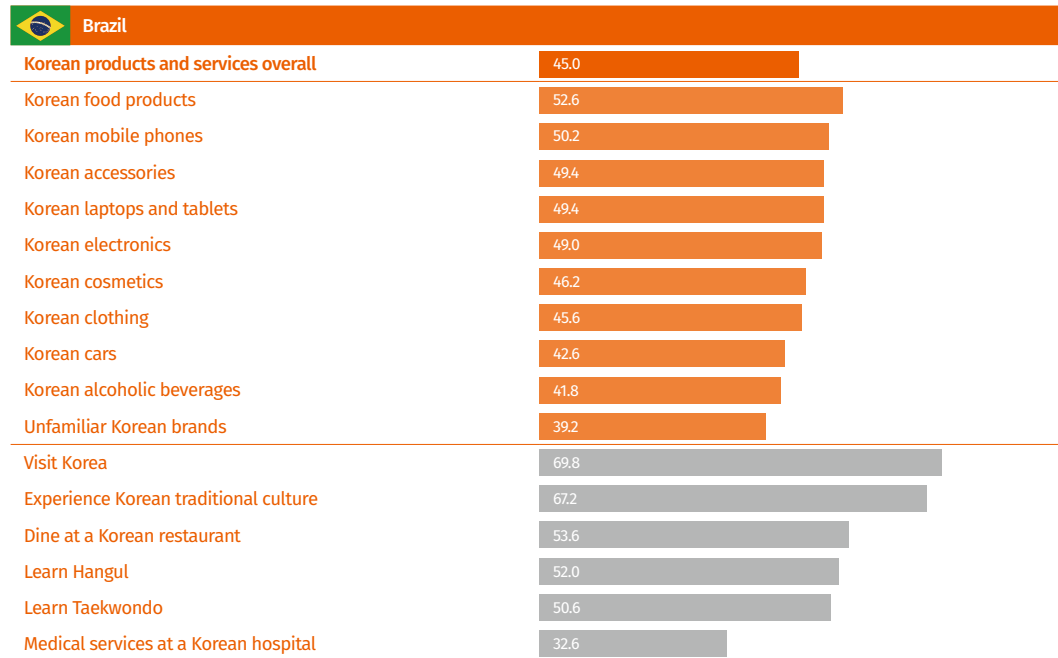


Americas

After Europe, the Americas recorded the lowest future use intention for Korean products and services among the five regions. Among Korean products, the intention to use food, mobile phones, and clothing was generally high, and among services, respondents expressed a desire to visit Korea and dine at Korean restaurants, similar to Asia and Oceania.

There were clear differences between North and South America; the US recorded relatively low results while Brazil and Argentina were higher than the regional average. Overall use intention in the US slightly declined from 2019, while the desire to purchase Korean food, clothing, cosmetics, and home appliances grew. In Brazil, overall use intention dropped by nearly 10%p from 2019, and the intention to use Korean mobile phones, laptops, and tablets was high. Argentina, a new addition in the 2020 survey, recorded a slightly higher overall use intention than Brazil, and respondents expressed a stronger desire to learn Taekwondo than did other countries.

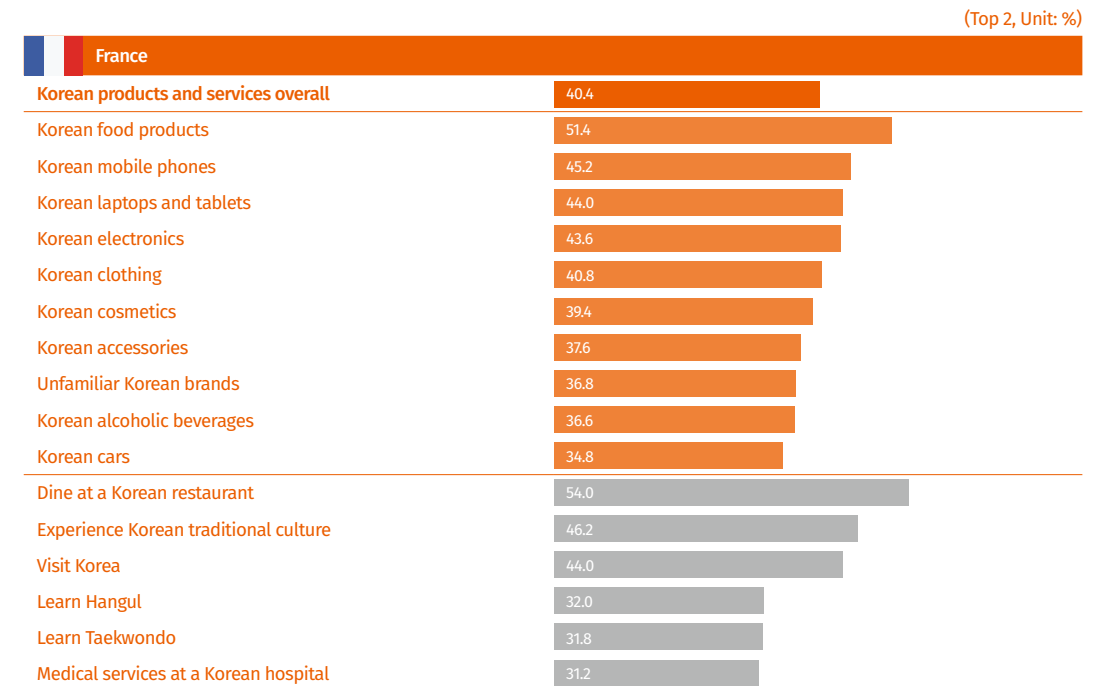


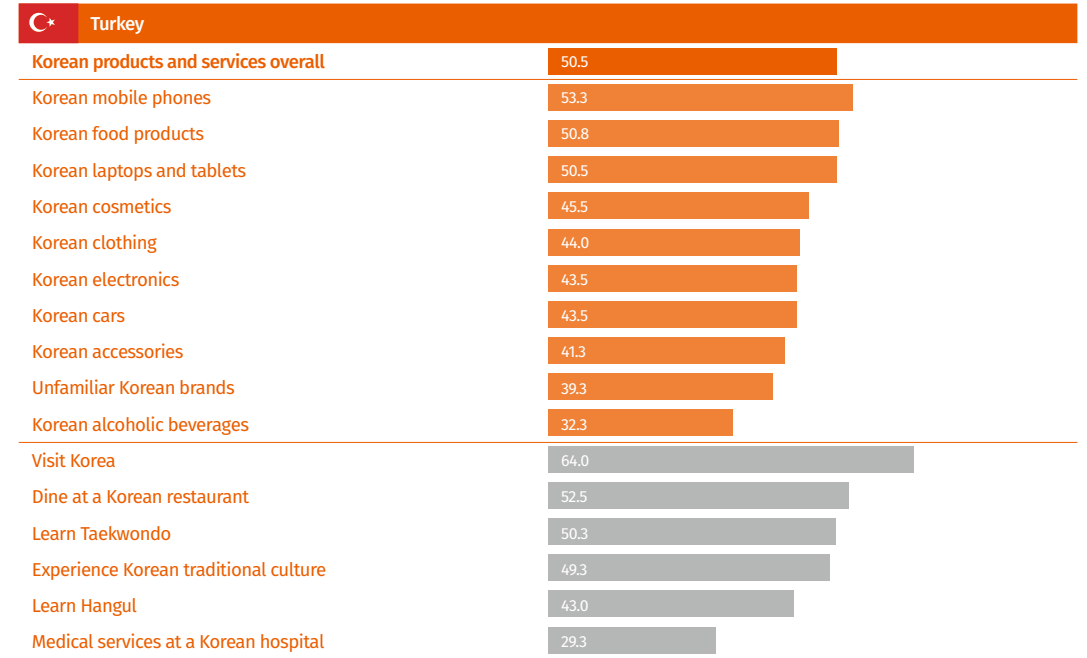
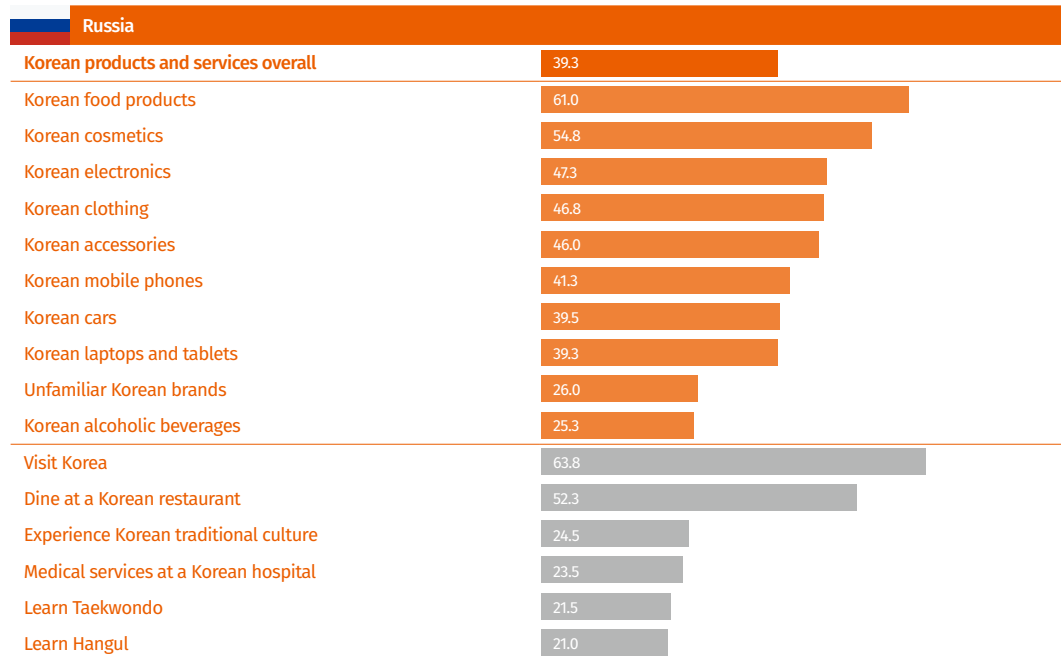
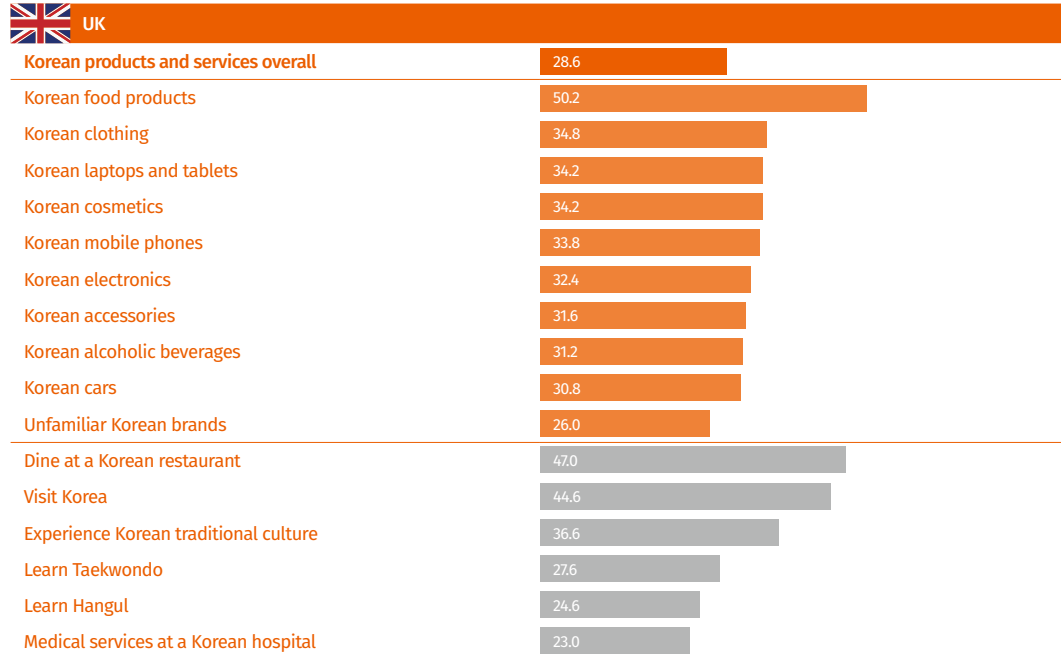


Europe

Europe recorded the lowest intention to use Korean products and services of all regions, and the response rates declined slightly from 2019. Overall, the respondents showed a strong intention to purchase Korean food, mobile phones, laptops, and tablets, along with a strong desire to dine at Korean restaurants and visit Korea.

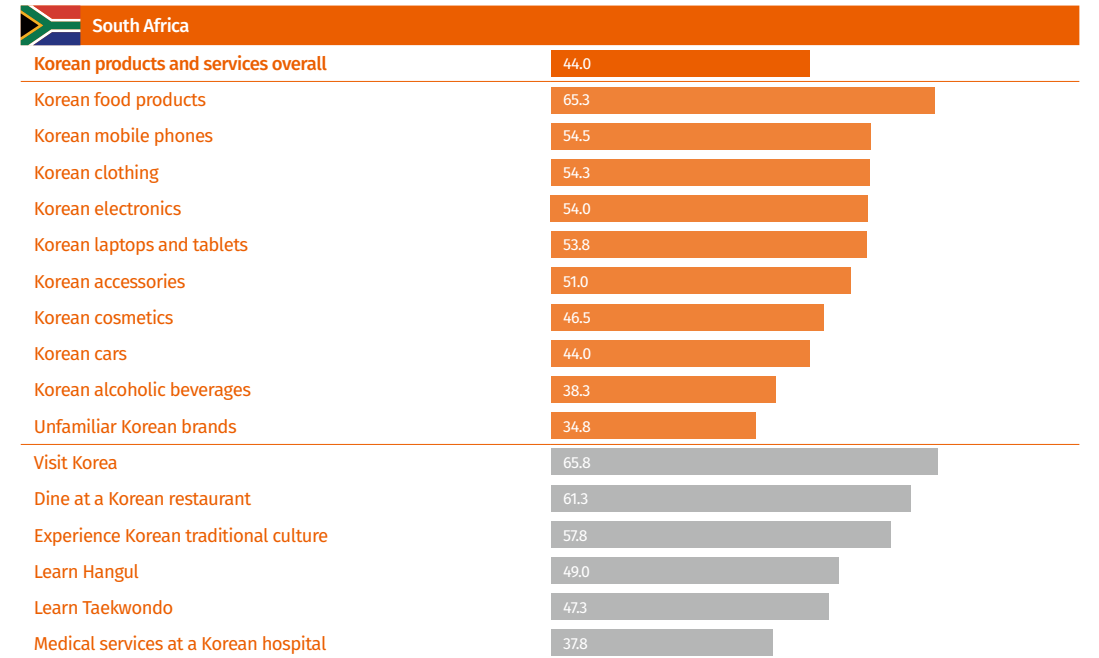
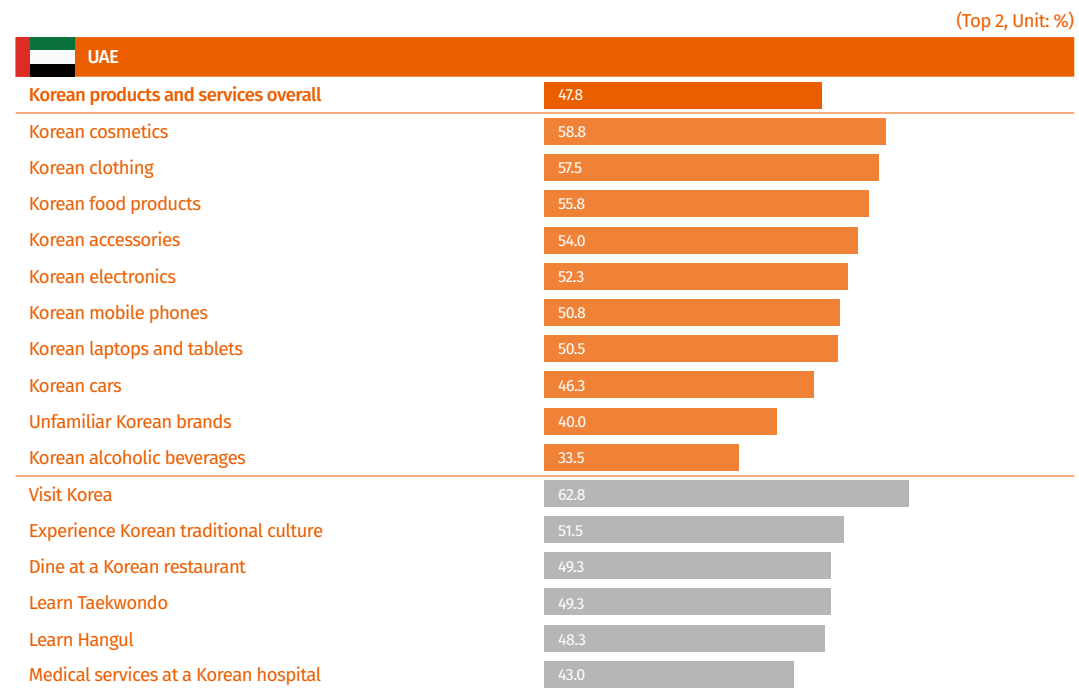
For the second consecutive year, Turkey recorded the highest use intention and the UK recorded the lowest after Japan, with a drop of nearly 10%p from 2019. Respondents in Russia and Turkey showed a relatively high intention to purchase Korean automobiles.





The Middle East and Africa

The Middle East showed the highest use intention for Korean products and services among all regions for the third year in a row, whereas Africa was close to the average of the five regions. Compared with 2019, the overall use intention in the Middle East decreased slightly and that in Africa increased slightly. Respondents in the Middle East showed a high intention to purchase Korean cosmetics, clothing, and food and to visit Korea and experience Korean traditional culture, while respondents in Africa showed a high intention to purchase Korean food, mobile phones, and clothing, visit Korea, and dine at Korean restaurants.

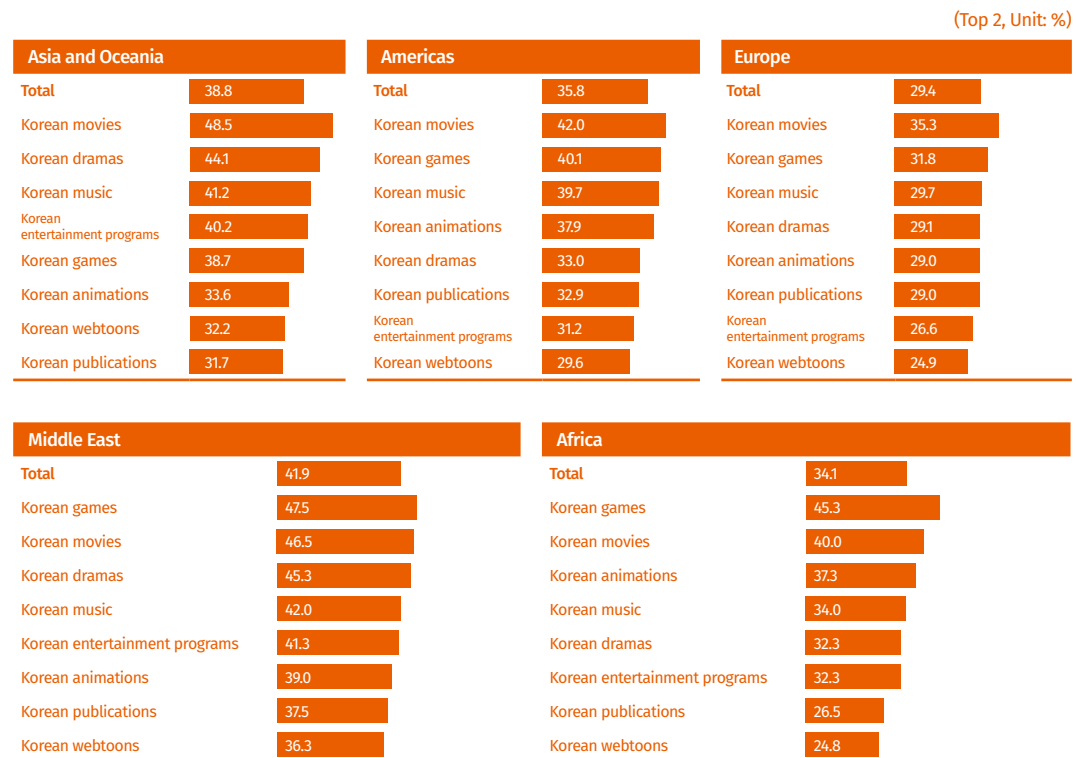


Intention to pay for Hallyu content in the future

Five Regions

The average intention to pay for Hallyu content in the future across all regions was 36%, similar to the 2019 survey (35.6%). Compared with 2019, the use intention in Asia and Oceania increased slightly, that in the Americas declined by 5%p, and the other regions showed similar results. For the second consecutive year, the Middle East recorded the highest intention to pay for content, and Europe recorded the lowest.

By content type, the intention to pay for movies was the highest in Asia and Oceania, the Americas, and Europe, whereas in the Middle East and Africa, the intention to pay for games (a new addition to the 2020 survey) was the highest. Overall, the intention to pay for movies, games, dramas, and music was relatively high, while that for publications, webtoons, and entertainment programs was low.



Asia and Oceania

In Asia and Oceania, the average intention to pay for all Hallyu content was 38.8%. China, Thailand, Indonesia, India, and Vietnam recorded above-average results, while Japan, Taiwan, Malaysia, and Australia recorded below-average results. As in 2019, India recorded the highest intention to pay for content among all 18 countries, whereas Japan recorded the lowest for the third consecutive year. However, the results in Japan were somewhat positive in that the intention to pay for Hallyu content increased by 7%p from 2019.

In terms of content type, the intention to pay for movies was the highest in eight countries, excluding Japan, where the intention to pay for dramas was the highest. Overall, many respondents were willing to pay for movies, dramas, music, games, and entertainment programs. Conversely, in most countries, the intention to pay for animations, webtoons, and publications was below average for all content types.



India		Vietnam		Australia	
Total	57.7	Total	42.0	Total	29.6
Korean movies	65.4	Korean movies	50.6	Korean movies	34.3
Korean games	62.0	Korean music	46.0	Korean games	32.5
Korean entertainment programs	59.2	Korean dramas	45.4	Korean dramas	30.8
Korean dramas	58.2	Korean entertainment programs	43.0	Korean music	30.8
Korean animations	58.2	Korean games	41.0	Korean entertainment programs	28.5
Korean music	54.6	Korean publications	38.0	Korean animations	28.3
Korean publications	52.4	Korean webtoons	36.6	Korean webtoons	26.8
Korean webtoons	51.6	Korean animations	35.4	Korean publications	24.8

Americas

The average intention to pay for Hallyu content in the Americas was 35.8%, similar to the average across all regions (36%), and slightly down from 2019. Respondents from the US and Argentina showed a lower intention than the regional average, while the response rate in Brazil was 6% higher. The difference between content types in the US was not large (about 8%), whereas that in Brazil and Argentina was about 16%. This implies that South American respondents more clearly distinguish between paid and free content than their North American counterparts.

By content type, the intention to pay for movies, music, games, and animations was high overall. That for music was the highest in North America, while that for movies was the highest in South America. The intention to pay for entertainment programs, webtoons, and publications was relatively low in all three countries.

(Top 2, Unit: %)

US		Brazil		Argentina	
Total	32.0	Total	41.8	Total	33.8
Korean music	36.2	Korean movies	49.0	Korean movies	42.6
Korean movies	34.4	Korean music	44.4	Korean games	42.2
Korean games	34.2	Korean animations	44.4	Korean music	38.6
Korean animations	33.6	Korean games	44.4	Korean animations	35.8
Korean dramas	31.0	Korean dramas	41.2	Korean publications	31.0
Korean publications	29.2	Korean publications	38.6	Korean entertainment programs	26.8
Korean webtoons	28.6	Korean entertainment programs	38.4	Korean dramas	26.8
Korean entertainment programs	28.4	Korean webtoons	33.6	Korean webtoons	26.6

Europe

Of the five regions, Europe reported the lowest average intention to pay for Hallyu content at 29.4%, up by a slight 1%p from 2019. Similar to the 2019 survey results, respondents in France and Turkey showed a relatively high intention to pay for content, while those in the UK and Russia reported the lowest levels not only in the region but among all surveyed countries. Nevertheless, both the UK and Russia saw increased rates from 2019 (up 2.8%p and 4.5%p, respectively), signaling the importance of future trends.

In terms of content type, similar to other regions, the intention to pay for movies, games, and music was high overall, while that for entertainment programs and webtoons was low in all four countries. The intention to pay for games and music was low in Russia and Turkey, respectively, a deviation from the average trend.

(Top 2, Unit: %)

France		UK	
Total	32.0	Total	25.5
Korean movies	39.0	Korean games	28.6
Korean games	37.0	Korean music	28.2
Korean music	31.8	Korean movies	28.2
Korean publications	31.2	Korean dramas	25.0
Korean animations	30.4	Korean animations	24.8
Korean dramas	29.2	Korean publications	23.6
Korean entertainment programs	28.8	Korean entertainment programs	23.4
Korean webtoons	28.4	Korean webtoons	22.2

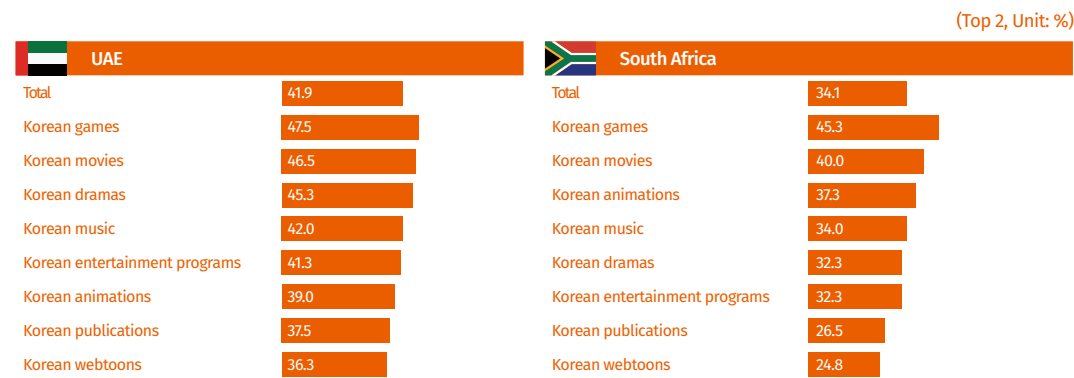
Russia		Turkey	
Total	18.1	Total	42.5
Korean movies	23.3	Korean movies	51.8
Korean animations	21.5	Korean games	48.3
Korean music	20.3	Korean dramas	45.3
Korean publications	19.5	Korean publications	42.5
Korean dramas	17.8	Korean animations	40.0
Korean entertainment programs	17.5	Korean music	38.3
Korean games	13.0	Korean entertainment programs	37.0
Korean webtoons	12.0	Korean webtoons	37.0

Influence of Hallyu content consumption on purchase or use of Korean products and services

The Middle East and Africa

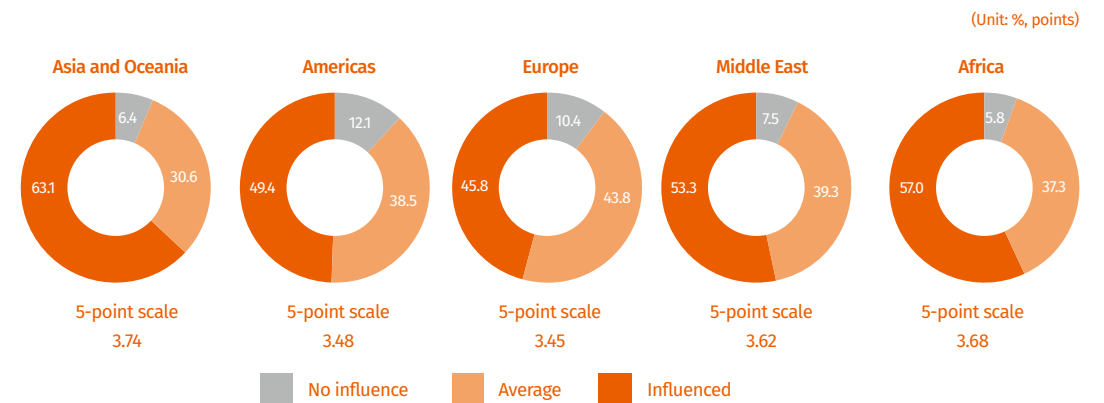
In the Middle East and Africa, the average intention to pay for Hallyu content was 41.9% and 34.1%, respectively. The Middle East reported the highest results among all regions for the second consecutive year, while Africa's results were slightly lower than the average for all regions. There was little difference from the 2019 survey results.

Respondents from both regions showed a high intention to pay for games and movies and a low intention to pay for publications and webtoons, which was similar to the other regions.



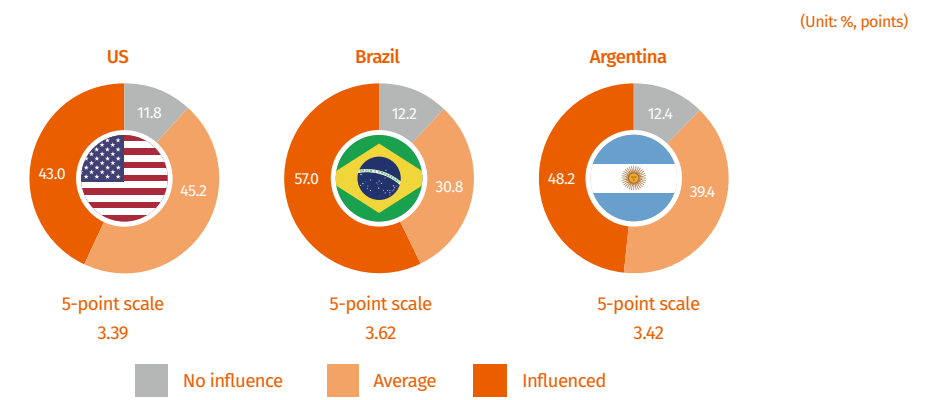
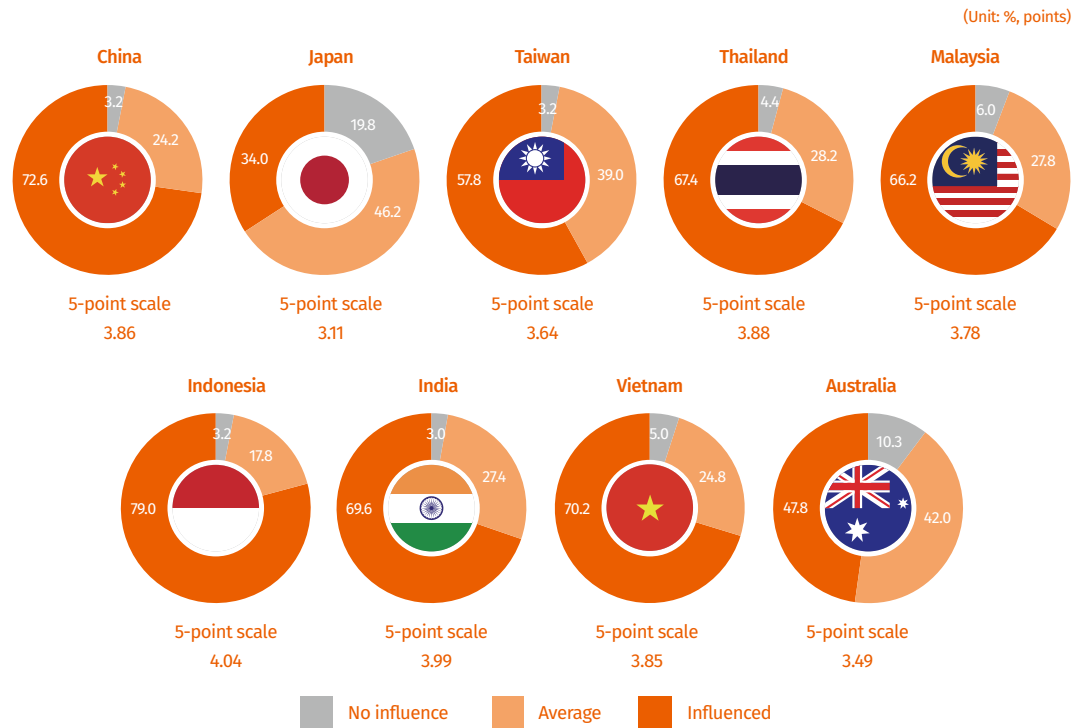
Five Regions

The respondents were asked whether consuming Hallyu content influenced their purchase or use of Korean products and services. More responded affirmatively than those who responded "No influence" or "Average." In particular, more than 60% of the respondents in Asia and Oceania reported that they were influenced, with a score of 3.74 on a 5-point scale. The Middle East and Africa recorded a high response rate of "Influenced" at around 55%, and the Americas was also close to 50%. Europe was the only region where the response rates for "Influenced" and "Average" were similar.



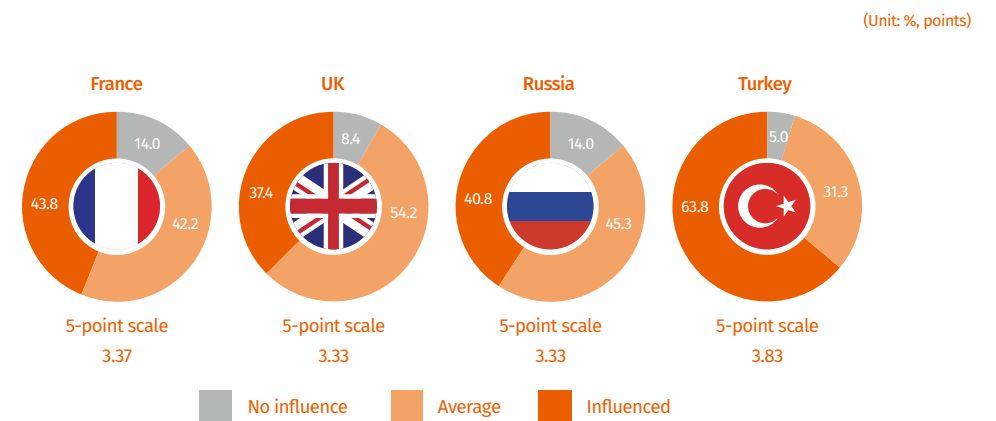
Asia and Oceania

Consuming Hallyu content had the greatest influence on the use of Korean products and services in Asia and Oceania. This trend was more pronounced in China and Southeast Asian countries, all of which scored at least 3.7 on a 5-point scale. Of all surveyed countries, Indonesia alone scored above 4 points, and consuming Hallyu content had the greatest influence on using Korean products and services. In contrast, only 34% of Japanese consumers responded "Influenced" (3.11 points), the lowest among all countries.



Europe

Consuming Hallyu content had the least influence on the use of Korean products and services in Europe. The UK, in particular, reported a higher rate of “Average” than “Influenced,” scoring the lowest on a five-point scale among all surveyed countries after Japan. In contrast, only in Turkey was the influence of Hallyu content relatively strong, with over 60% of respondents indicating that they were influenced (3.83 points).



Americas

Within the Americas, there was a marked distinction between North and South America. In the US, fewer respondents answered that consuming Hallyu content influenced their use of Korean products and services compared with those who answered “Average,” whereas more respondents answered “Influenced” in Brazil and Argentina. The influence of Hallyu content was particularly strong in Brazil, where nearly 60% of respondents answered “Influenced” (3.62 points).

The Middle East and Africa

In the Middle East and Africa, the influence of Hallyu content was slightly higher than the average among all regions. In both regions, over 50% of the respondents reported that they were affected (3.6 points), evidencing an above-average influence of Hallyu content consumption on the use of Korean products and services.

(Unit: %, points)

