Handbook on the analysis of major issues in Hallyu and regional trends throughout 2022

GLOBAL

2022

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Global Hallyu Trends

HALLYU

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2022 Global Hallyu Trends

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2022
GLOBAL HALLYU TRENDS

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prologue

Hallyu: Peak or Inflection Point?

Hallyu safely passed through the jet stream of the worst of the COVID-19 pandemic and made a soft landing in the endemic state. Compared with the first year of the COVID-19 outbreak in 2020, various Hallyu-related indicators and total exports have increased. Although the generalization of contactless consumption has contributed to Hallyu's growth, it is mainly attributed to the enhanced competitiveness of Hallyu contents itself. *Squid Game* sparked a global sensation and broke almost all records related to OTT video contents. *Squid Game* showed surprising ripple effects in terms of performance indicators, such as viewing households and time, and social aspects, such as public discourse and entertainment culture. Several subsequent Korean works achieved success, and global companies bolstered their investments in Hallyu contents.

Led by BTS, K-Pop also enjoyed a rise in popularity and influence. News of K-Pop groups charting on the Billboard Hot 100 and 200 became a daily occurrence. For BTS, the question was not *whether* they would top the Billboard chart but *how long* they would stay there. In today's digital era, the sales of physical albums by K-Pop singers continue to rise, and concert tours have resumed.

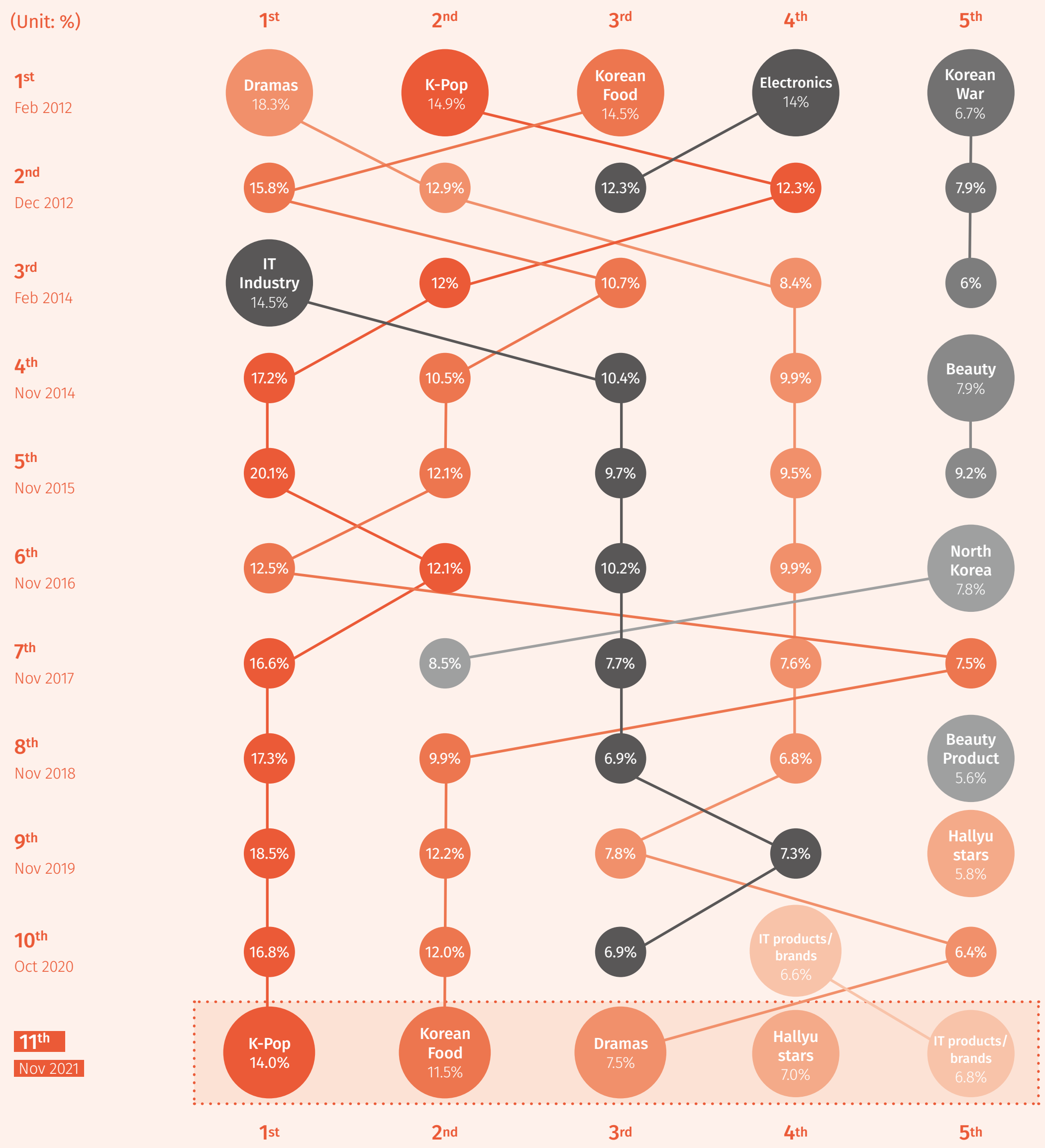
Given this landscape, rumors abound that Hallyu has reached its peak and will only decline from here onward. This claim has especially been fueled by the recent news of BTS temporarily suspending group activities. However, although no one can deny the group's massive influence on K-Pop and Hallyu, it should not be exaggerated to draw extreme "all-or-nothing" conclusions. The production system for K-Pop and other Hallyu contents continues to develop, the pool of experts is abundant, and the domestic and foreign capital investment is active. Considering these points, it is reasonable to claim that Hallyu has reached an inflection point rather than its peak.

Global Hallyu Trends, which sees its sixth publication this year, is a handbook that presents analyses of issues in Hallyu each year and summarizes the status of Hallyu by country and region. In particular, based on the *2022 Overseas Hallyu Survey* and *2021 Hallyu Economic Impact Study*, the *2022 Global Hallyu Trends* uses survey results from 8,500 overseas Hallyu consumers (users) in 18 countries and statistics on the exports of Hallyu contents to analyze the perceptions, consumption status, ripple effects, and the state of Hallyu in each country, as well as yearly issues in Hallyu. By comparing and analyzing the results by country and contents genre, *2022 Global Hallyu Trends* summarizes the major yearly issues in Hallyu and the status of Hallyu by region and present our findings to readers in an easy-to-understand report.

After safely emerging from the peak of the COVID-19 pandemic, Hallyu, as always, is actively adapting and evolving with paradigm shifts in all aspects, including production and distribution. It will be long before the world knows whether it has witnessed Hallyu's peak or passing of an inflection point. Nevertheless, *Global Hallyu Trends* will continue to fulfill its role faithfully as a reporter of Hallyu issues.

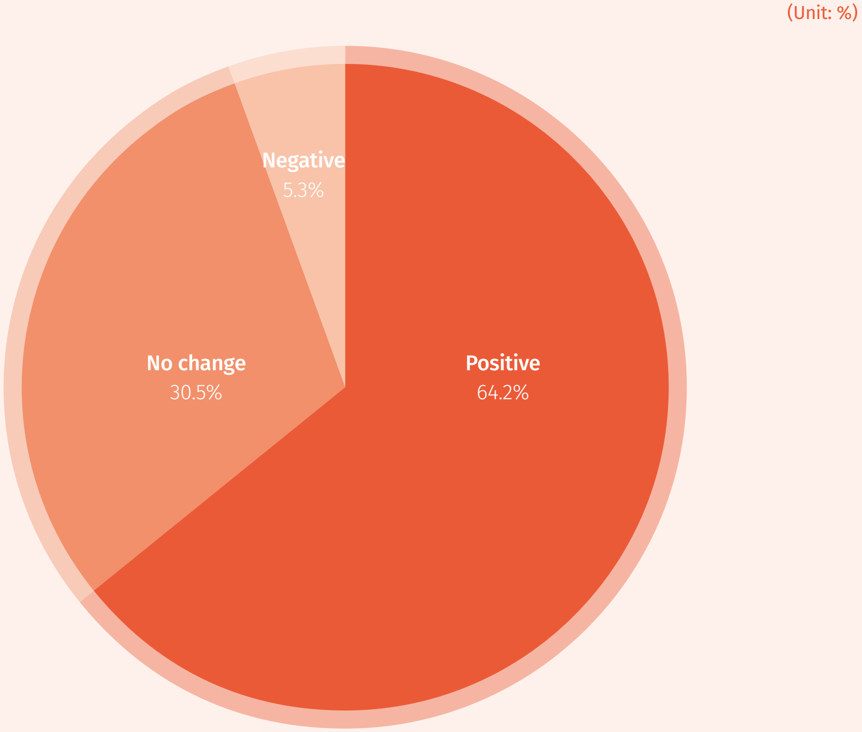
1. Images associated with Korea

For five consecutive years, "K-Pop" (14.0%) was the first term that overseas Hallyu consumers associated with Korea. This was followed by "Korean food" (11.5%), "Dramas" (7.5%), "Hallyu stars" (7.0%), and "IT products/brands" (6.8%). Notably, "Dramas" rose two places from fifth in 2020 to third place owing to the global sensation of *Squid Game*.

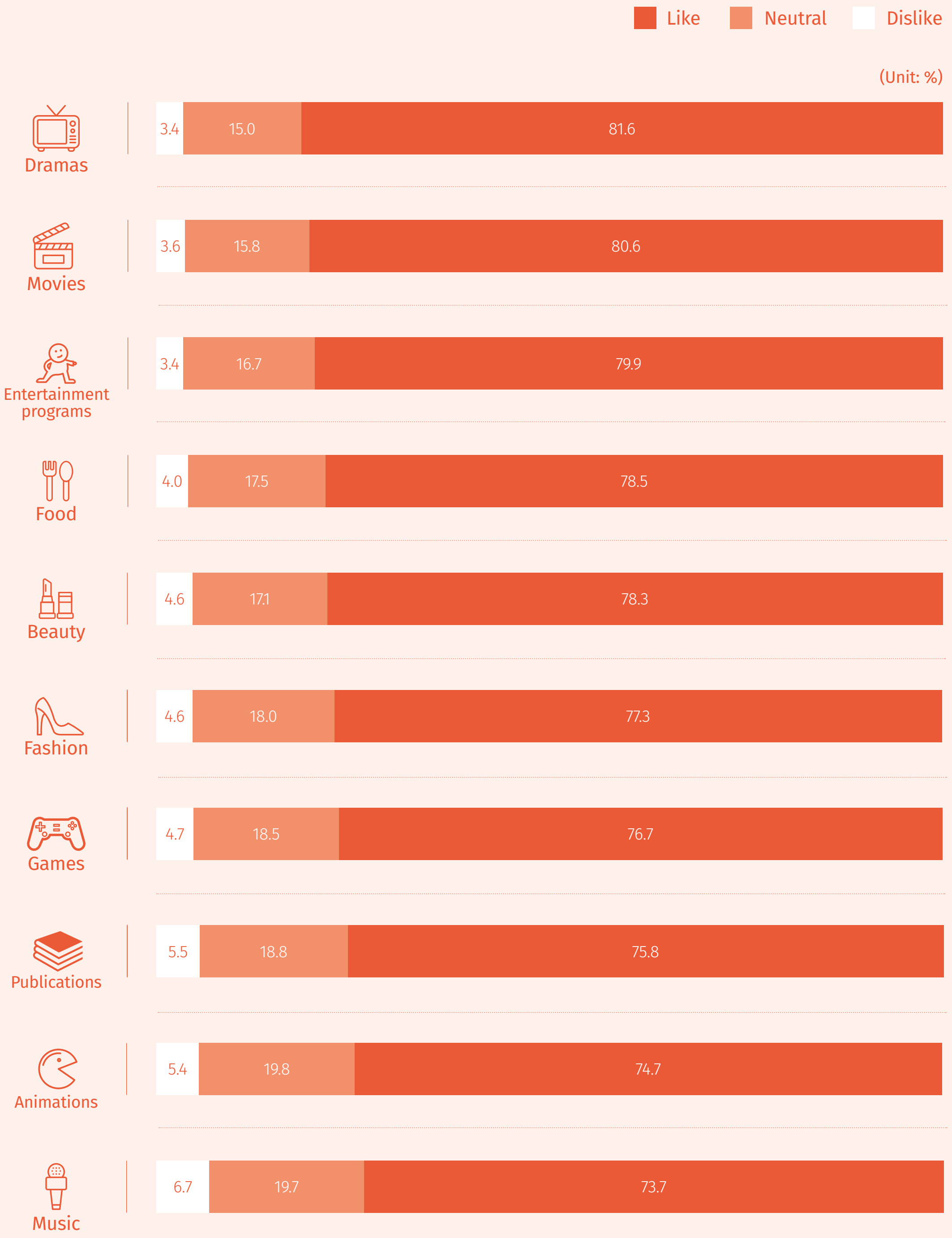


2. Changes in the perception of Korea after experiencing Hallyu contents

Nearly two-thirds (64.2%) responded that their perception of Korea changed positively after experiencing Hallyu contents, a 5.4% increase from 2020. South and Southeast Asian countries, including India (83.2%), Thailand (82.4%), and Vietnam (80.2%), showed relatively high rates of positive change, and the UAE (76.5%) and South Africa (73.5%) also showed high figures above 70%.

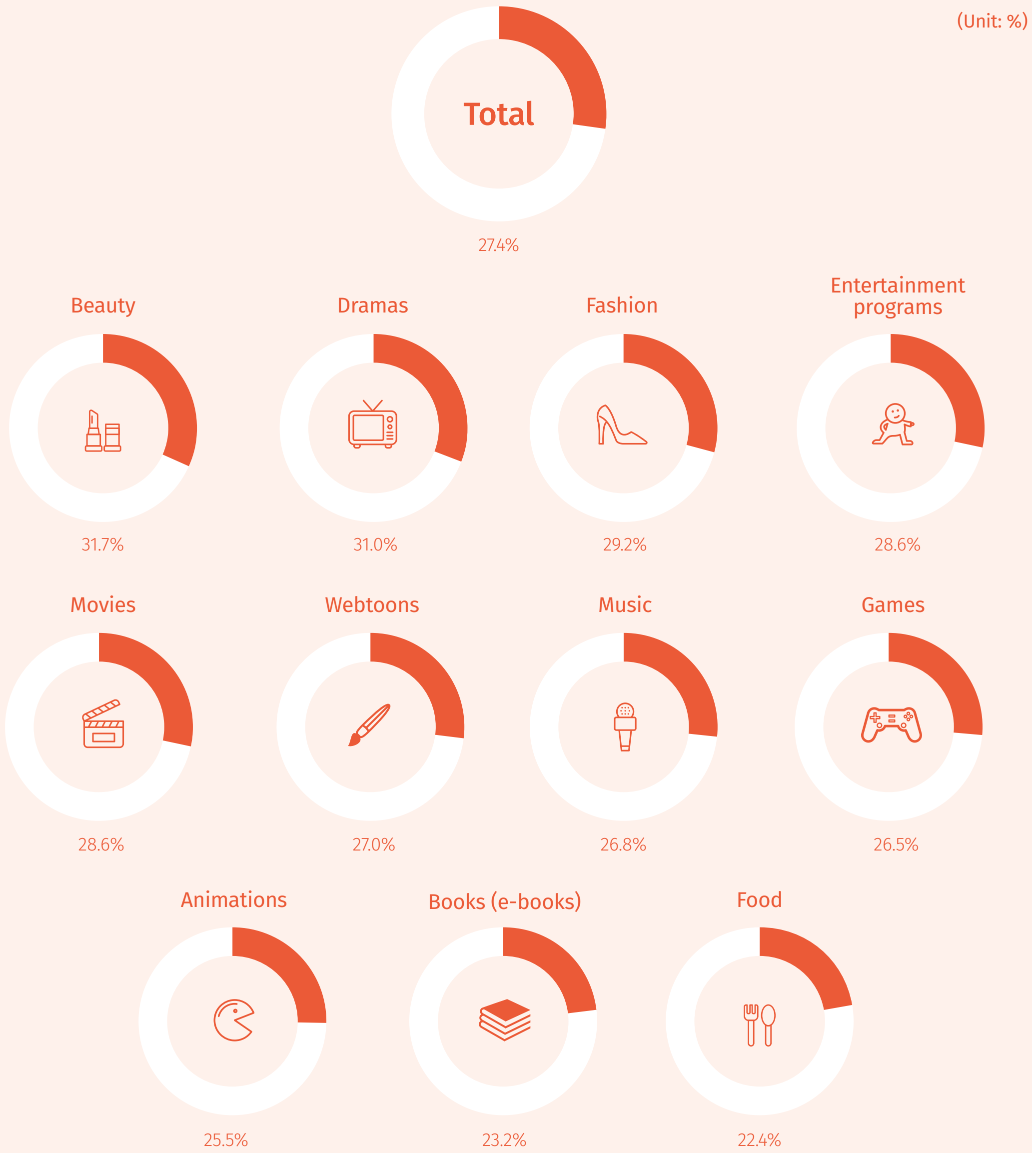


3. Favorability of Hallyu contents



4. Consumption of Hallyu contents by type

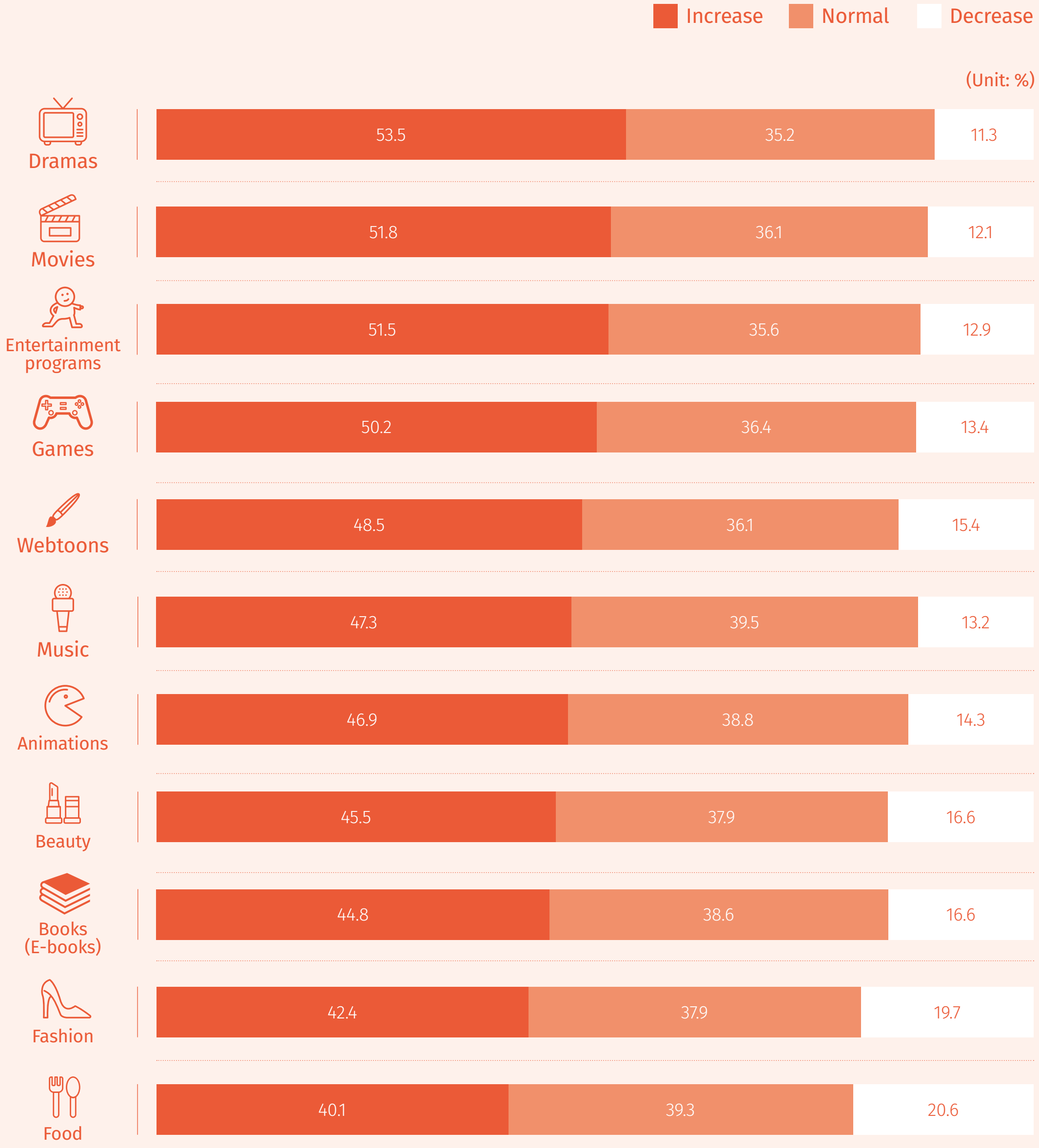
Of the types of cultural contents* consumed by overseas Hallyu consumers, "Beauty" was the most commonly consumed at 31.7%, followed by "Dramas" (31.0%), "Fashion" (29.2%), "Entertainment programs" (28.6%), and "Movies" (28.6%).



* The cultural contents are defined as cultural products and services(i.e., movies, games, animations, comics(webtoons), music, internet & mobile contents, broadcasting, etc.).

5. Changes in consumption of Hallyu contents compared with before the COVID-19 outbreak

The types of contents that saw increased consumption after the COVID-19 outbreak were mainly video contents, such as “Dramas” (53.5%), “Movies” (51.8%), “Entertainment programs” (51.5%), and “Games” (50.2%). Conversely, consumption significantly declined for contents where face-to-face consumption is important, such as “Food” (20.6%), “Fashion” (19.7%), and “Beauty” (16.6%).



6. Access to Hallyu contents

Following the previous year, the respondents primarily accessed Hallyu contents 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.

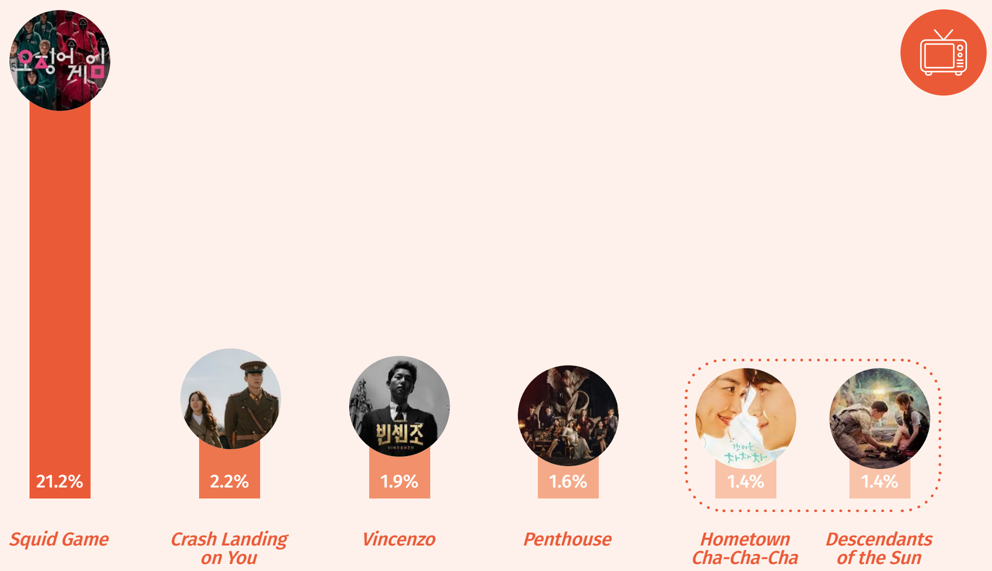
7. Popularity factors of Hallyu contents

	1st		2nd	
Dramas	Well-structured story	15.9%	Attractive appearance of actors	15.9%
Entertainment programs	Fun games/material	15.8%	Can indirectly experience Korean culture	12.8%
Movies	Well-structured story	17.3%	Can indirectly experience Korean culture	13.5%
Music	Addictive chorus/rhythm	18.3%	Attractive appearance/style of singer/group	14.8%
Animations	Excellent visuals	18.8%	Favorable character personality/role	17.3%
Publications	Favorable story/illustrations	20.3%	Various materials/genres	13.8%
Games	Favorable graphics/pictures	16.5%	Gameplay style/configuration	13.0%
Fashion	Favorable design	20.5%	Various product types/styles	15.4%
Beauty	Excellent effects/quality	23.0%	Low price for quality	11.4%
Food	Taste	33.8%	Experience Korean food/food culture through Hallyu contents	15.1%

8. Factors inhibiting favorability

	1st		2nd	
Dramas	Subtitles/dubs are inconvenient	11.1%	Korean is difficult and unfamiliar	11.0%
Entertainment programs	Korean is difficult and unfamiliar	11.7%	Subtitles/dubs are inconvenient	11.1%
Movies	Korean is difficult and unfamiliar	12.9%	Subtitles/dubs are inconvenient	11.7%
Music	Korean is difficult and unfamiliar	13.6%	Music genres are uniform	11.2%
Animations	Korean is difficult and unfamiliar	11.2%	Subtitles/dubs are inconvenient	11.0%
Publications	Insufficient translations into native language	16.1%	Strong Korean undertones	9.9%
Games	High device specifications	11.7%	Expensive to use	9.9%
Fashion	Sizes are not diverse	17.4%	High price for quality	16.4%
Beauty	High price for quality	16.1%	Exaggerated product promotions	11.6%
Food	Not cost-effective	11.8%	Difficult-to-use eating utensils	10.9%

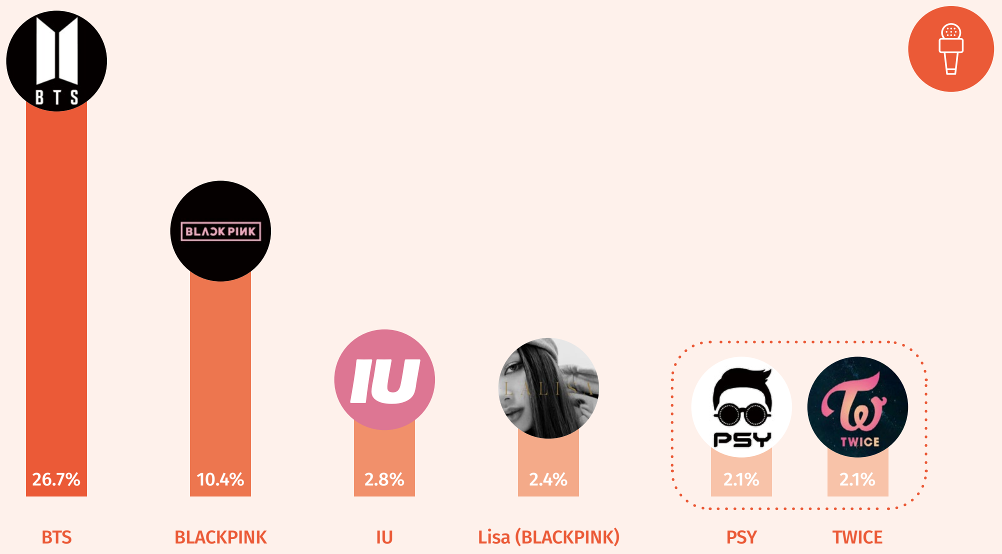
9. Favorite Korean dramas



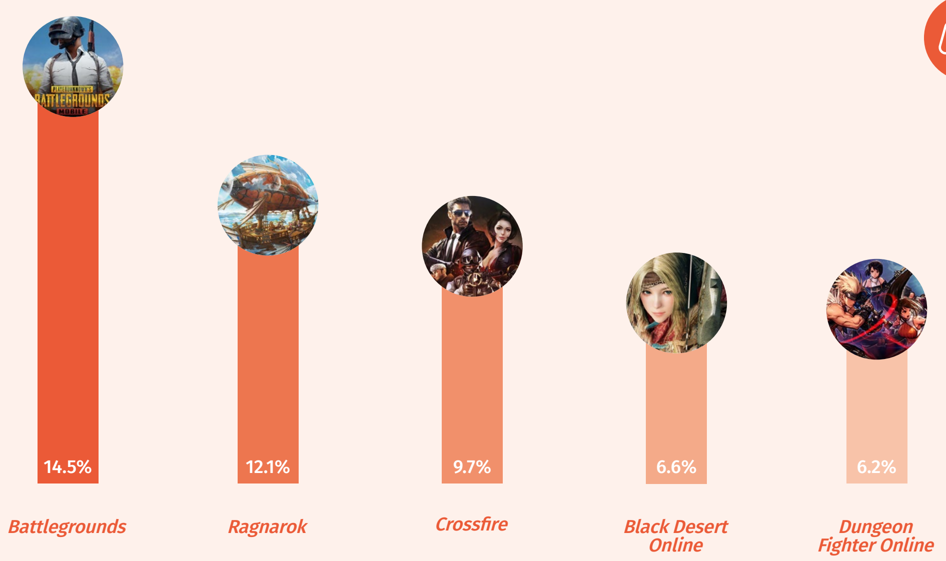
10. Favorite Korean movies

11. Favorite Korean actors

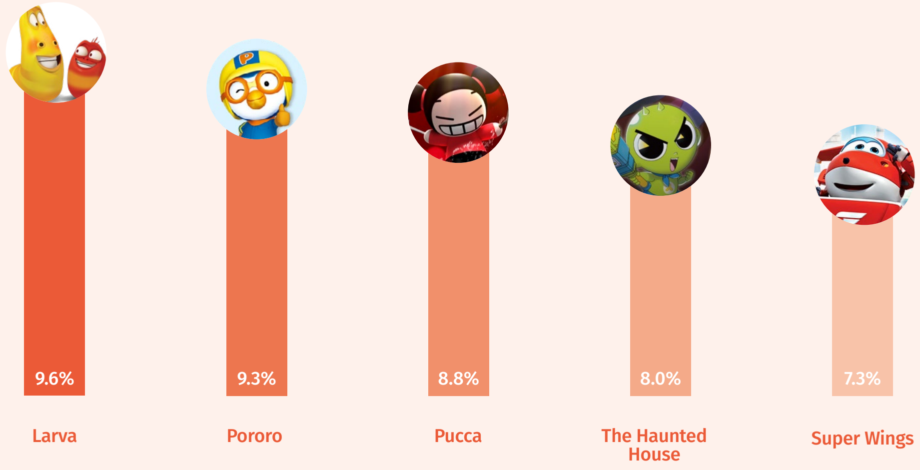
12. Favorite Korean singers/groups



13. Favorite Korean games



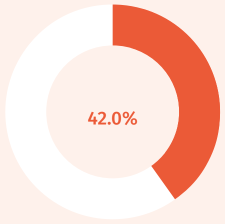
14. Favorite Korean characters (animation)



15. Intention to use Hallyu contents in the future

1. Intention to spend on Hallyu contents in the future

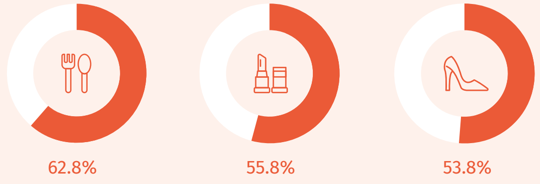
A total of 42.0% of all respondents expected their intention to spend on Hallyu contents to increase after one year.



2. Countries with high intention to spend on Hallyu contents

3. Intention to pay for Hallyu contents in the future

Hallyu contents with a high intention to pay for use were “Food” (62.8%), “Beauty” (55.8%), and “Fashion” (53.8%).

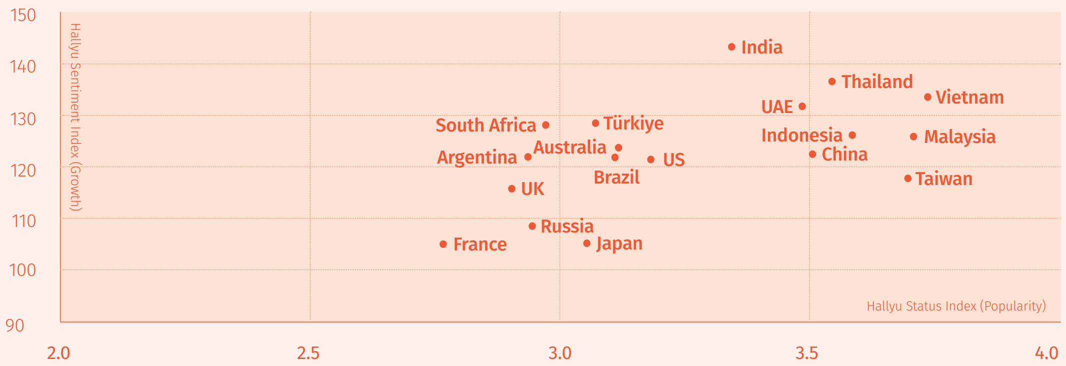


4. Countries with high intention to pay for Hallyu contents

16. Hallyu Index and usage indicators by country

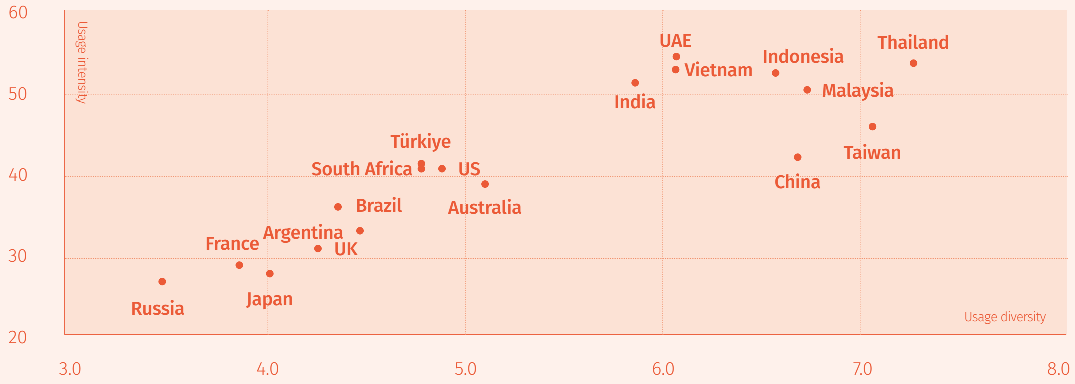
The Hallyu Status Index and Hallyu Sentiment Index were 3.2 and 123.2 on average, up 4.9% and 6.2% compared with the previous year, respectively. Notably, Hallyu was highly popular in countries where it had remained at a low-to-mid level in the past, such as the US, the UK, Australia, and South Africa. The usage diversity and usage intensity of Hallyu contents also increased by 8.6% and 18.5%, compared with the previous year, to 5.4 and 41.9, respectively. The US, Australia, the UK, and South Africa saw rapid increases in usage diversity and usage intensity compared with the previous year. Japan showed a particularly large rise in usage intensity.

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



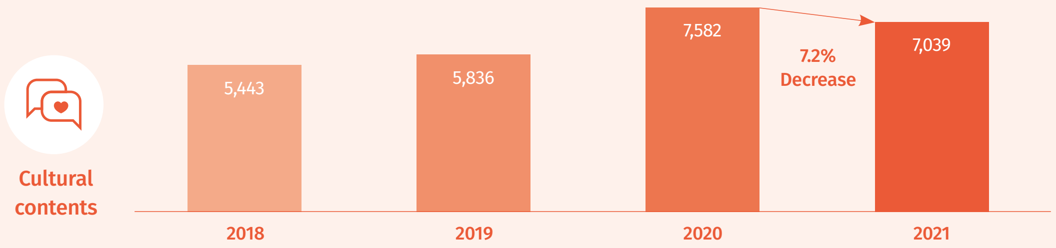
***Usage diversity**: The degree of diversity to which respondents consume Korean popular culture (measured from 1 to 10)

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

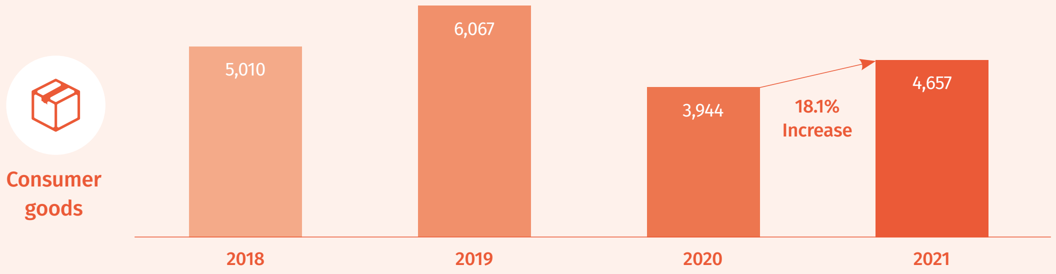
17. Exports due to Hallyu

In 2021, USD 11.6 billion in exports were attributed to Hallyu, up 1.5% from 2020. Exports of cultural contents products, which had substantially increased despite the COVID-19 pandemic, decreased by 7.2% in 2021 owing to the base effect, and tourism remained sluggish. However, with a staggering 19.2% rise in exports of consumer goods, total exports due to Hallyu shifted to an upward trend, albeit slight.

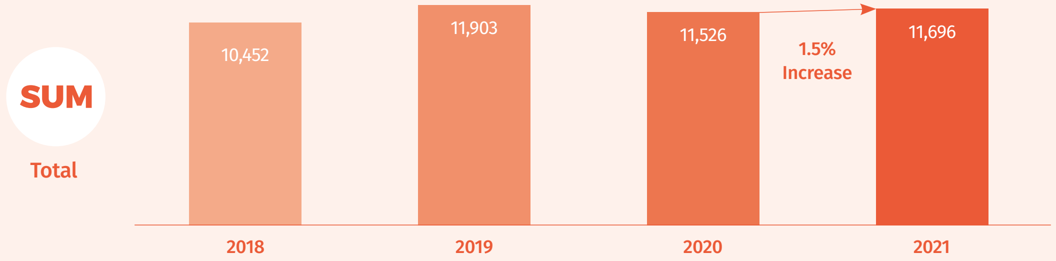
(Unit: millions of USD)



(Unit: millions of USD)



(Unit: millions of USD)



* The tourism industry, which was directly impacted by the COVID-19 pandemic, significantly contracted in 2020–2021.

Section 1

2022 Major Issues in Hallyu

ISSUE 1
The global sensation of Squid Game

ISSUE 2
Increased hybridity and solidification of fandoms in K-Pop

ISSUE 3
Expansion of Hallyu contents consumption owing to prolonged COVID-19 pandemic

ISSUE 4
Expanding popularization of Hallyu

ISSUE 5
K-Pop and Hallyu after BTS

ISSUE 1

The global sensation of Squid Game

Analysis of various performance indicators and popularity factors of Squid Game

It is no exaggeration to say that over the past year, Hallyu was driven by *Squid Game*. Since its release on September 17, 2021, *Squid Game* has broken almost all records related to global OTT contents. On October 13, 2021, Netflix announced that the drama recorded the highest number of viewing households in the history of the platform (*JoongAng Ilbo*, October 13, 2021)[1]. In the first 28 days after release, 142 million households watched *Squid Game*, considerably surpassing *Bridgerton*'s previous record of 82 million and also exceeding 100 million households for the first time. *Squid Game* also recorded approximately 1.65 billion hours of cumulative viewing time over the first 28 days, according to official figures published on Netflix's website. This is the highest viewership ever, leaving a large gap ahead of the 300 million hours by *Stranger Things* Season 4, which holds second place.

Squid Game also claimed the title of the first work to achieve the highest viewership in all countries where Netflix officially operates (83 countries as of October 2021). It topped the TV show rankings in all countries and the overall rankings compiled for all contents distributed by Netflix, remaining at the number one position for 53 days (46 consecutive days) (*The Dong-a Ilbo*, February 28, 2022)[2]. Merely three weeks after *Squid Game*'s release, Netflix's market capitalization rose by KRW 24,434.3 billion (+7.87%). The ripple effect of *Squid Game* was extremely massive—new subscribers in the third quarter of 2021 exceeded forecasts, recording 4.4 million (*JoongAng Ilbo*, October 10, 2021)[3]. The number of visitors to the show's Wikipedia page, which indirectly indicates its popularity among internet users, also exceeded that of *Game of Thrones*, which had previously ranked first (see Figure 1). The survey results for "Favorite Korean Drama" in the *2022 Overseas Hallyu Survey* also demonstrate the *Squid Game* sensation. *Squid Game* recorded a preference of 21.1%, nearly 10 times that of *Crash Landing on You* at the second place (2.2%) (see Figure 2).

Table 1 **Highest 28-day cumulative viewing time after first release of Netflix contents**

(As of July 20, 2022)

1st	***Squid Game* Season 1(1,650,450,000 hours)**	6th	*Money Heist* Part 4(619,010,000 hours)
2nd	*Stranger Things* Season 4(1,339,520,000 hours)	7th	*Stranger Things* Season 4(582,100,000 hours)
3rd	*Money Heist* Part 5(792,230,000 hours)	8th	*Lucifer* Season 5(569,480,000 hours)
4th	*Bridgerton* Season 2(656,260,000 hours)	**9th**	***All of Us Are Dead* Season 1(560,780,000 hours)**
5th	*Bridgerton* Season 1(625,290,000 hours)	10th	*The Witcher* Season 1(541,010,000 hours)

*Source: Netflix website

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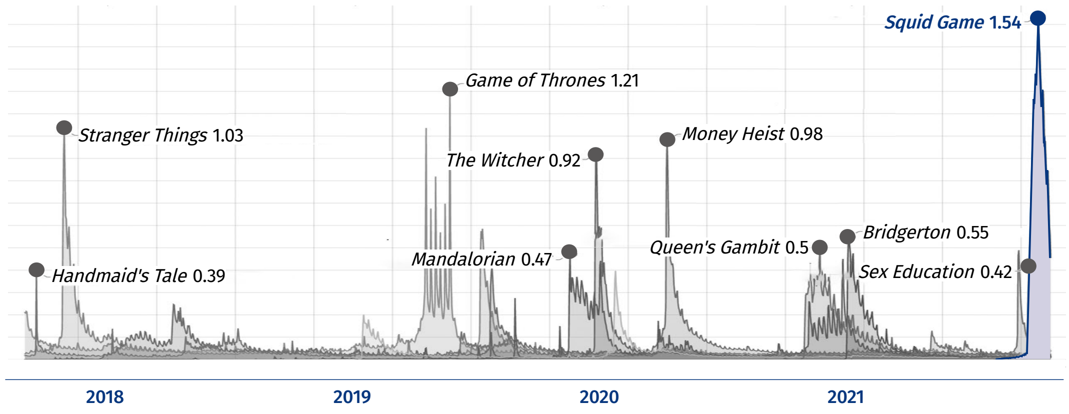
1. *JoongAng Ilbo* (October 13, 2021), "'*Squid Game*' records Netflix's highest viewership ever...111 million households."
2. *The Dong-a Ilbo* (February 28, 2022), "The first, most, and longest... Records broken by three-time SAG winner *Squid Game*."
3. *JoongAng Ilbo* (October 10, 2021), "Netflix market cap spikes 24 trillion, 'Now is the beginning, compared to the popularity of *Squid Game*...'"

Figure 1 Number of daily visitors to Wikipedia contents (drama) pages

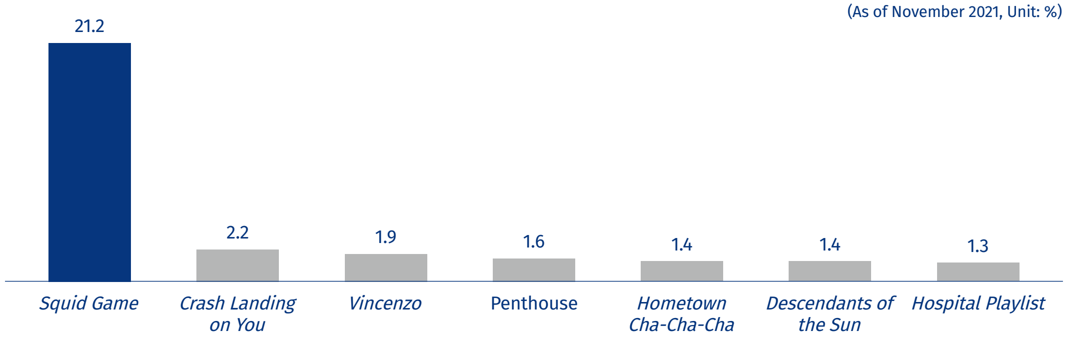
(As of October 26, Unit: million persons)



*Source: WOLFRAM website

Figure 2 Favorite Korean dramas

(As of November 2021, Unit: %)



*Source: KOFICE (2022). *2022 Overseas Hallyu Survey*.

Squid Game's record-breaking success is mostly attributed to its plot, composed of mainly simple and visual games that anyone can intuitively understand regardless of language or culture. Conversely, another major success factor is its detailed character narratives, which helped viewers easily empathize with the characters. Moreover, *Squid Game* combined the "death game" genre, which is popular and familiar overseas, with the Korean elements of *shinpa* (tear jerker) and familial (community) responsibility, giving the drama a fresh and universal appeal.

Performance and prospects of Korean video contents after Squid Game

Since *Squid Game* took the world by storm, Netflix and other global OTTs have been increasingly investing in and distributing Korean video contents. Netflix is the most active in this regard. At the beginning of 2022, Netflix announced that it would invest up to KRW 1 trillion in Korean contents production (*The Chosun Ilbo*, January 19, 2022)[4]. The Netflix original drama *My Name* remained in the top 5 on the "World Ranking" of FlixPatrol, a Netflix contents ranking site, for ten days immediately after its release on October 15, 2021. *Hellbound*, released on November 20, 2021, simultaneously entered the "Top 10 Popular Series" ranking in over 84 countries and topped FlixPatrol's "World Ranking" from the first day of release. At the beginning of 2022, *All of Us Are Dead* entered the "Top 10 Popular Series" ranking in 90 countries directly after release. As shown in Table 1, it ranked ninth in cumulative viewers over 28 days. Driven by the success of *Squid Game* and subsequent Korean works, in terms of popular Netflix contents producers' shares, Korea ranked second after the US, with a share of approximately 12% in the fourth quarter of 2021. This is nearly triple its share from the second quarter of 2020 (fourth place, see Table 2).

Table 2 Share ranking of popular Netflix contents producers

(As of January 17, 2022)

Position	Q4 2021	Q3 2021	Q2 2021	Q1 2021	Q4 2020	Q3 2020	Q2 2020
1	US (58.97%)	US (63.16%)	US (56.25%)	US (66.24%)	US (62.24%)	US (59.84%)	US (60.88%)
2	South Korea (11.87%)	South Korea (5.36%)	Mexico (5.3%)	UK (6.28%)	UK (7.41%)	UK (5.43%)	Spain (7.14%)
3	Colombia (3.5%)	Spain (4.72%)	Spain (5.13%)	South Korea (4.36%)	South Korea (4.2%)	South Korea (5.26%)	UK (5.61%)
4	Spain (3.05%)	Colombia (3.78%)	UK (4.5%)	Spain (2.64%)	Canada (2.7%)	Colombia (4.18%)	South Korea (4.51%)
5	UK (2.62%)	France (3.07%)	South Korea (4.49%)	Colombia (2.28%)	Spain (2.54%)	Poland (3.74%)	Poland (2.87%)
6	France (2.15%)	UK (2.71%)	Japan (2.96%)	India (2.03%)	Colombia (2.13%)	Mexico (3.57%)	France (2.16%)
7	Germany (2.11%)	Japan (2.43%)	Canada (2.57%)	Italia (1.8%)	France (1.97%)	Spain (3.12%)	Canada (2.06%)
8	India (2.09%)	Germany (1.96%)	Colombia (2.54%)	Mexico (1.52%)	India (1.64%)	Germany (3.04%)	Japan (2.02%)
9	Japan (1.91%)	Russia (1.79%)	China (2.04%)	Poland (1.43%)	Japan (1.48%)	France (1.83%)	Germany (1.94%)
10	Canada (1.61%)	India (1.29%)	Poland (1.88%)	France (1.28%)	Germany (1.46%)	Japan (1.55%)	Colombia (1.77%)

*Source: "What's on Netflix" website

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[4] *The Chosun Ilbo* (January 19, 2021), "Netflix to invest up to KRW 1 trillion for K-contents...Passive explanation for various controversies."

While not produced directly by Netflix, *Vincenzo*, *Hometown Cha-Cha-Cha*, *The King's Affection*, *Nevertheless*, and *Hospital Playlist* have also topped Netflix's popular contents rankings. *Extraordinary Attorney Woo*, produced by KT and distributed on Netflix, topped the "TV Show" ranking in 20 countries and ranked third worldwide according to FlixPatrol (*The Chosun Ilbo*, July 30, 2022)[5]. Season 2 of *Squid Game* and other Korean contents to be produced (released) in the future will likely benefit from intensifying competition among global OTTs and the diversification of distribution channels, as well as the halo effect of existing hits.

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[5] *The Chosun Ilbo* (July 30, 2022), "'Extraordinary Attorney Woo syndrome' that works overseas...It topped Netflix in 20 countries."

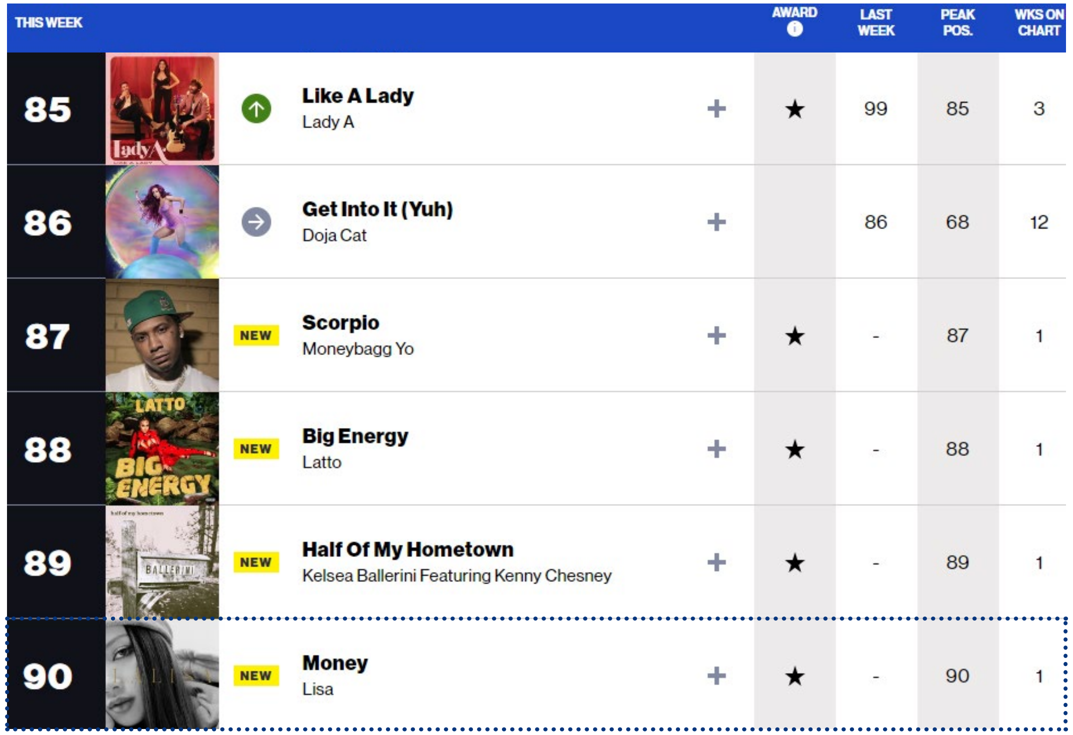
ISSUE 2

Increased hybridity and solidification of fandoms in K-Pop

Increased hybridity of K-Pop

Hybridity has long been highlighted as a trait and popularity factor of K-Pop, and it continues to grow in degree. Transnational factors have become essential in the entire process of producing and distributing K-Pop contents, from recruiting idol group members to collaborating with overseas experts. In particular, Lisa, the Thai member of BLACKPINK, released her solo debut album in September 2021 and re-sparked the discourse on K-Pop identity. Lisa's album *LALISA*, titled after her real name, sold 750,000 copies in its first week and a cumulative 950,000 copies (as of August 4, 2022). "*LALISA*," the title song of the same album, recorded over 500 million YouTube views and topped the iTunes Song Chart in 65 countries. Moreover, the B-side "MONEY" was streamed over 400 million times on Spotify and charted at number 90 on the Billboard Hot 100, a first for a female K-Pop singer.

Figure 3 **Billboard Hot 100 chart ranking as of November 6, 2021**



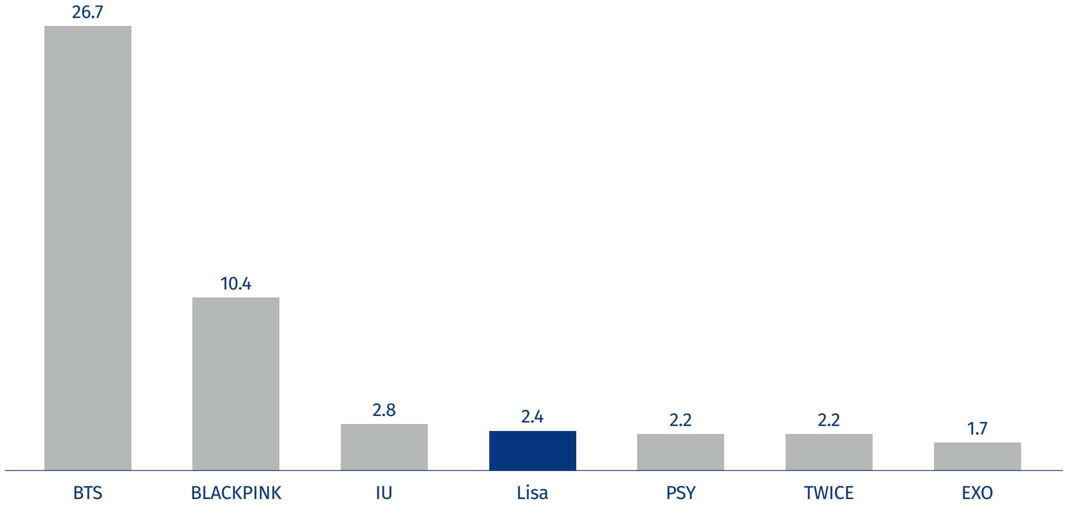
THIS WEEK				AWARD	LAST WEEK	PEAK POS.	WKS ON CHART
85	↑	**Like A Lady** Lady A	+	★	99	85	3
86	→	**Get Into It (Yuh)** Doja Cat	+		86	68	12
87	NEW	**Scorpio** Moneybagg Yo	+	★	-	87	1
88	NEW	**Big Energy** Latto	+	★	-	88	1
89	NEW	**Half Of My Hometown** Kelsea Ballerini Featuring Kenny Chesney	+	★	-	89	1
90	NEW	**Money** Lisa	+	★	-	90	1

*Source: Billboard website

Lisa, who holds a Thai nationality, is a member of one of the world's most popular K-Pop groups. Although the Korean agency planned and produced the album and music video, the multinational nature of the personnel renders meaningless the effort of defining and distinguishing the identities of K-Pop and Lisa according to nationality or geographic borders. The results of the "Favorite Korean Singer/Group" survey of the *2022 Overseas Hallyu Survey* also clearly show this attribute. Lisa ranked fourth after BTS, BLACKPINK, and IU and recorded a high preference of 23.4%, especially in her home country. Thai Hallyu fans recognize Lisa as a K-Pop singer.

Figure 4 **Favorite Korean singers/groups**

(As of November 2021, Unit: %)



*Source: KOFICE (2022). *2022 Overseas Hallyu Survey.*

Solidification of K-Pop fandoms

Twenty years have passed since the music consumption paradigm shifted from albums to digital, and album sales have changed from a measure of mass popularity to that of fandom loyalty. The consumption pattern, in which passionate fandoms, which include overseas fans, purchase physical albums together, is already well known. According to the first-week album sales ranking, which indicates the size and loyalty of fandoms of individual K-Pop singers/groups in Korea and overseas, only five of the top 30 albums were released over two years ago. Individual album sales have also tended to increase with the latest release; twelve of the top 30 albums were released in 2022. In a first for a female group, Aespa surpassed 1 million first-week sales in their second year after debut, an achievement previously considered exclusively the realm of male groups. Along with IVE and Lisa, these figures demonstrate that the fandom loyalty of female singers/groups is also solidifying (*YTN*, July 15, 2022)[6]. K-Pop singers' overseas performances, which had been suspended for the past two years owing to the COVID-19 pandemic, are also resuming, and K-Pop fandoms are expanding in numbers and strength as well.

Table 3 **First-week album sales ranking of K-Pop singers/groups**

(As of August 31, 2022)

Rank	Artist	Album Name	Release Date	Sale amount(Unit: copis)
1	BTS	*MAP OF THE SOUL : 7*	2020/2/21	3,378,6**
2		*Proof*	2022/6/10	2,752,4**
3		*BE*	2020/11/20	2,274,8**
4		*MAP OF THE SOUL : PERSONA*	2019/4/12	2,130,4**
5	Seventeen	*Face the Sun*	2022/5/27	2,0677**
6	BTS	*Butter*	2021/7/9	1,973.2**
7	NCT DREAM	*Glitch Mode*	2022/3/28	1,405,1**
8	Seventeen	*Your Choice*	2021/6/18	1,364,1**
9		*Attacca*	2021/10/22	1,335,8**
10	TOMORROW X TOGETHER	*minisode 2: Thursday's Child*	2022/5/9	1,248,3**
11	ENHYPEN	*MANIFESTO: DAY 1*	2022/7/4	1,241,1**
12	Seventeen	*SECTOR 17*	2022/7/18	1,126,1**
13	aespa	*Girls*	2022/7/8	1,126.0**
14	Lim Young-woong	*IM HERO*	2022/5/2	1,102,0**
15	Seventeen	*Tossing*	2020/6/22	1,097,8
16	NCT DREAM	*Hot Sauce*	2021/5/10	1,010,7**
17	BTS	*LOVE YOURSELF 轉 'Tear'*	2018/5/18	1,003,5**
18	ATEEZ	*THE WORLD EP.1 : MOVEMENT*	2022/7/29	936,0**
19	NCT	*Universe*	2021/12/14	933,4**
20	Seventeen	*Semicolon*	2020/10/19	932,0**
21	NCT 127	*Sticker*	2021/9/17	929.5**
22	IVE	*After LIKE*	2022/8/22	924,3**
23	EXO	*DON'T FIGHT THE FEELING*	2021/6/7	902,2**
24	Baekhyun	*Bambi*	2021/3/30	868,8**
25	BTS	*LOVE YOURSELF 'Answer'*	2018/8/24	868,0**
26	Stray Kids	*ODDINARY*	2022/3/18	853,0**
27	NCT DREAM	*Beatbox*	2022/5/30	848,3**
28	ENHYPEN	*DIMENSION : DILEMMA*	2021/10/12	818,7**
29	EXO	*DON'T MESS UP MY TEMPO*	2018/11/2	789,6**
30	BTS	*LOVE YOURSELF 承 'Her'*	2017/9/18	759,2**
31	Lisa	*LALISA*	2021/9/10	736,2**
32	Baekhyun	*Delight*	2020/5/25	704,5**

*Source: Hanteo Chart

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[6] *YTN* (July 15, 2022), "Aespa ushers in era of 1 million first-week sales for girl groups."

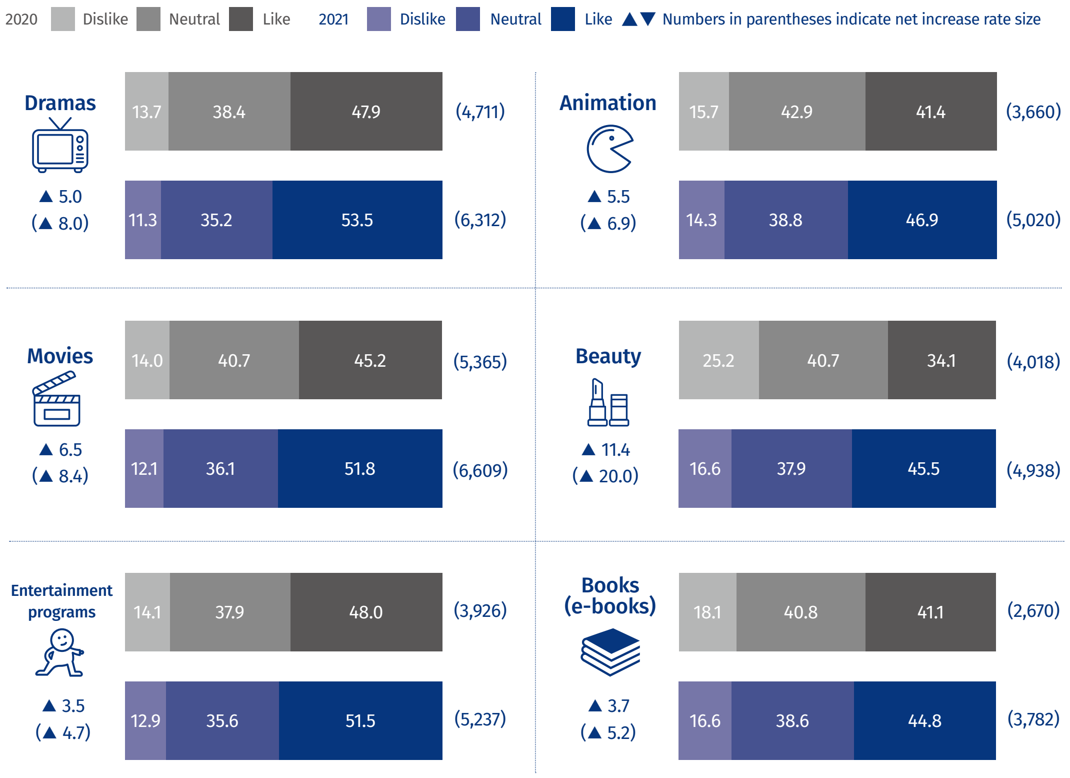
Expansion of Hallyu contents consumption owing to prolonged COVID-19 pandemic

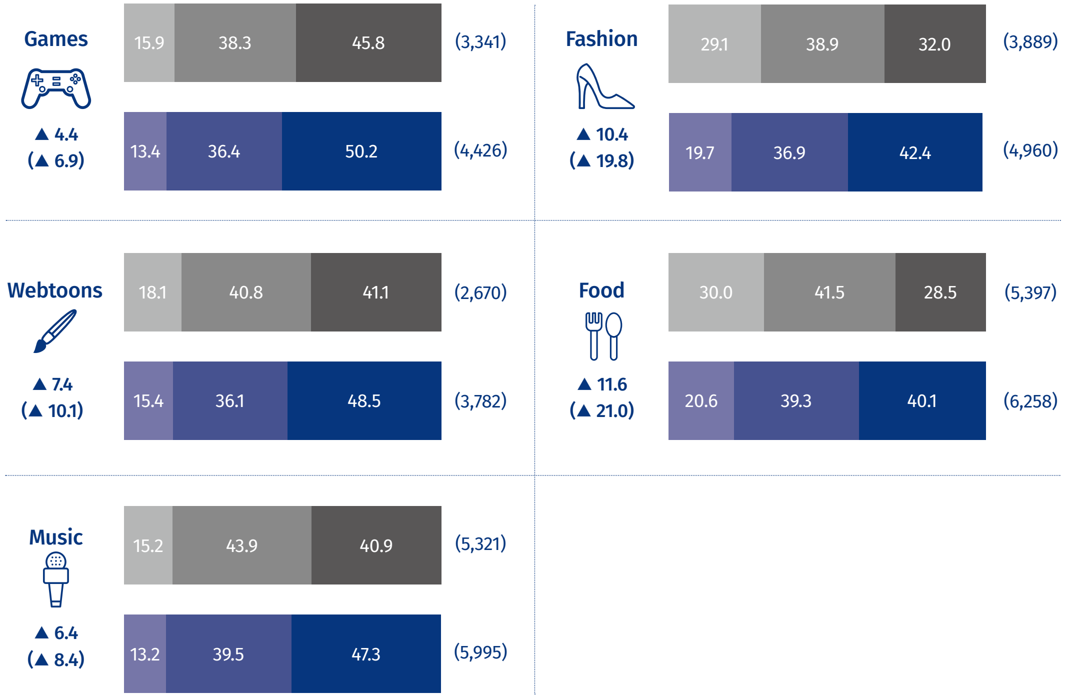
Increased Hallyu contents consumption compared with previous year

The types of contents that saw increased consumption (increased response rate) in 2021 compared with before the COVID-19 outbreak were mainly video contents, such as “Dramas” (53.5%), “Movies” (51.8%), “Entertainment programs” (51.5%), and “Games” (50.2%). Compared with 2020, the proportion of “Decrease” and “Similar” responses for all contents dropped, whereas that of “Increase” responses rose. Regarding net growth compared with the growth rate of the previous year, all contents from “Food” (21.0%) to “Entertainment Programs” (4.7%) also increased. This is attributed to the ripple effect of *Squid Game* and the generalization of contactless consumption behavior owing to the prolonged COVID-19 pandemic. As in the previous year, consumption declined more than other categories for contents where face-to-face consumption is important, such as “Beauty” (16.6%), “Fashion” (19.7%), and “Food” (20.6%).

Figure 5 Changes in consumption of Hallyu contents compared with before the COVID-19 outbreak

Base: Users with experience with Hallyu contents, n=(), Unit: %, %p





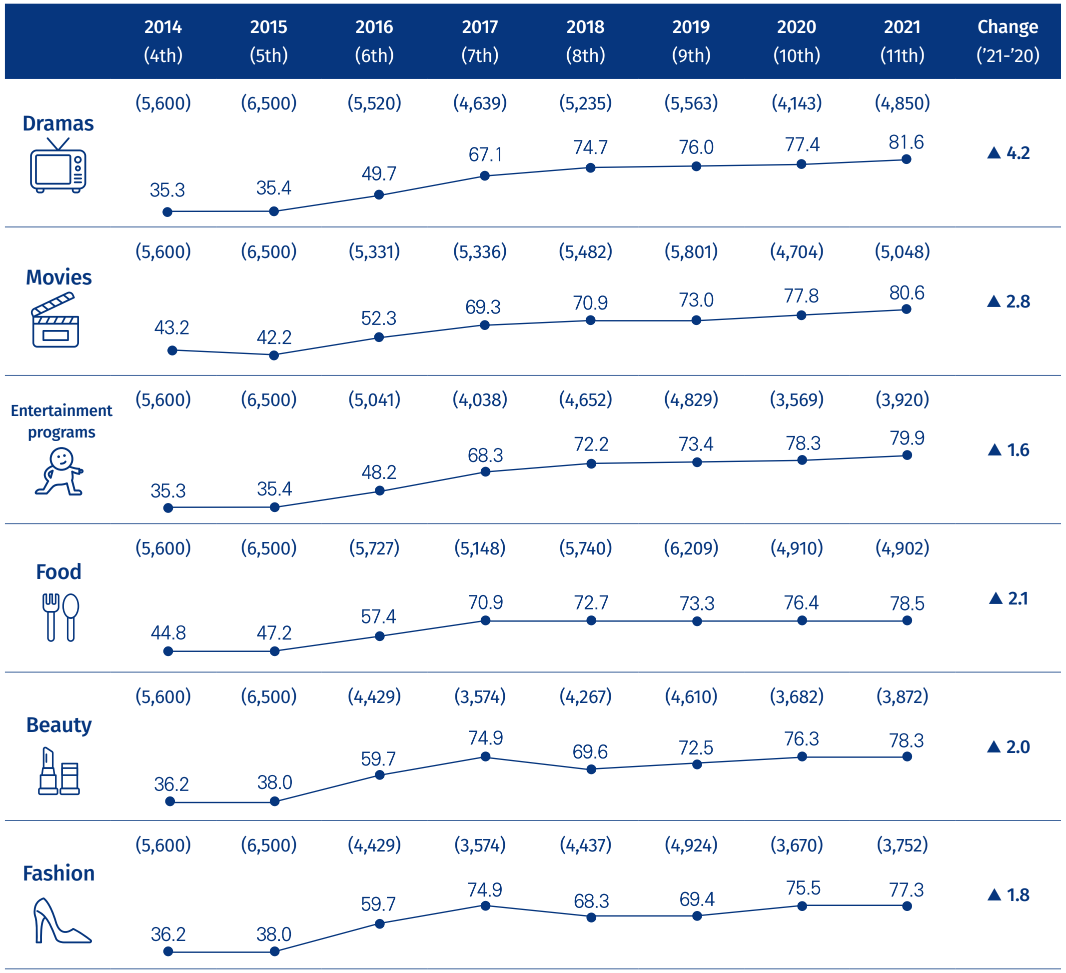
*Source: KOFICE (2022). *2022 Overseas Hallyu Survey.*

Drama favorability increase by 4.2% in 2021 from 2020

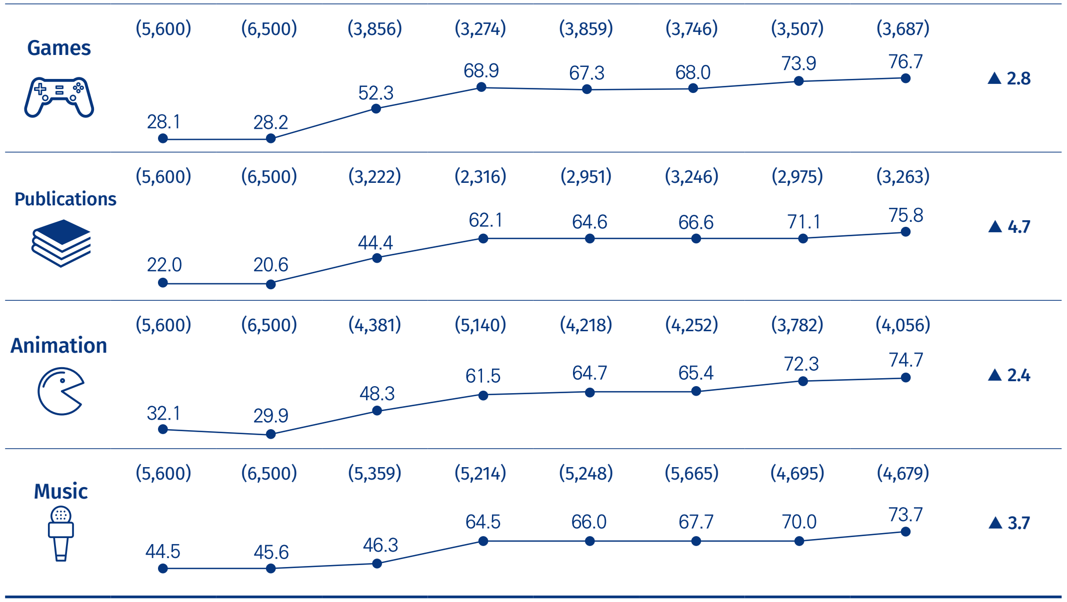
"Dramas" (81.6%) was the most favored Hallyu contents, and all genres rose by 1.6% to 4.7% compared with the previous year. This high favorability and increase rate for dramas can be attributed to the ripple effect of *Squid Game*. The publication that recorded the highest increase in favorability (4.7%) during the same period appears to have been influenced by the popularity of Sohn Won-pyung's *Almond*, a novel introduced by a BTS member on an entertainment program.

Figure 6 Changes in favorability of Hallyu contents

Base: Users with experience with Hallyu contents, n=(), Unit: Favorability(4+5) %, %p



	2014 (4th)	2015 (5th)	2016 (6th)	2017 (7th)	2018 (8th)	2019 (9th)	2020 (10th)	2021 (11th)	Change ('21-'20)
Dramas	(5,600)	(6,500)	(5,520)	(4,639)	(5,235)	(5,563)	(4,143)	(4,850)	
	35.3	35.4	49.7	67.1	74.7	76.0	77.4	81.6	▲ 4.2
Movies	(5,600)	(6,500)	(5,331)	(5,336)	(5,482)	(5,801)	(4,704)	(5,048)	
	43.2	42.2	52.3	69.3	70.9	73.0	77.8	80.6	▲ 2.8
Entertainment programs	(5,600)	(6,500)	(5,041)	(4,038)	(4,652)	(4,829)	(3,569)	(3,920)	
	35.3	35.4	48.2	68.3	72.2	73.4	78.3	79.9	▲ 1.6
Food	(5,600)	(6,500)	(5,727)	(5,148)	(5,740)	(6,209)	(4,910)	(4,902)	
	44.8	47.2	57.4	70.9	72.7	73.3	76.4	78.5	▲ 2.1
Beauty	(5,600)	(6,500)	(4,429)	(3,574)	(4,267)	(4,610)	(3,682)	(3,872)	
	36.2	38.0	59.7	74.9	69.6	72.5	76.3	78.3	▲ 2.0
Fashion	(5,600)	(6,500)	(4,429)	(3,574)	(4,437)	(4,924)	(3,670)	(3,752)	
	36.2	38.0	59.7	74.9	68.3	69.4	75.5	77.3	▲ 1.8



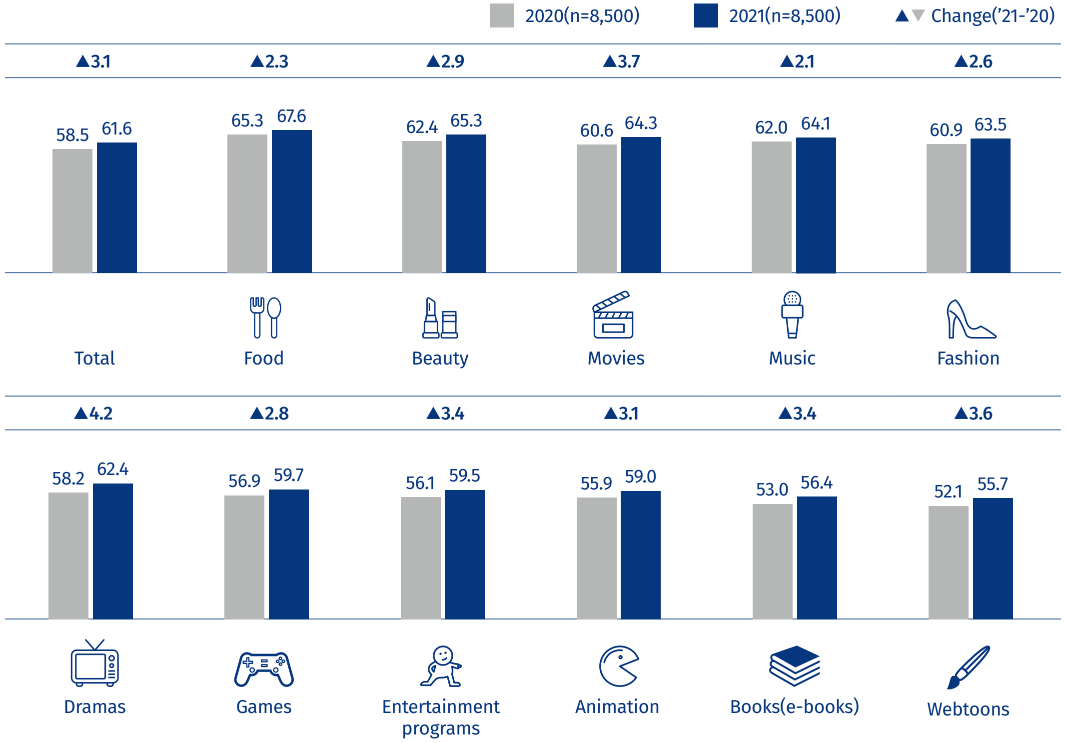
*Source: KOFICE (2022). *2022 Overseas Hallyu Survey.*

Hallyu contents Brand Power Index up 3.1 points from previous year

The Hallyu contents Brand Power Index (BPI), which has been measured since last year, recorded 61.6 points (out of 100), up 3.1 points from the previous year. By genre, “Food” (67.6), “Beauty” (65.3), “Movies” (64.3), and “Music” (64.1) recorded the highest BPI, in that order. “Dramas” (62.4, +4.2) showed the largest increase in BPI compared with the previous year, which, like its favorability score, can be attributed to the influence of *Squid Game*.

Figure 7 **Changes in Hallyu contents Brand Power Index**

Base: Total, n=8,500, Unit: points



*Source: KOFICE (2022). *2022 Overseas Hallyu Survey.*

ISSUE 4

Expanding popularization of Hallyu

Increase in Hallyu Index

The Hallyu Status Index increased in almost all countries. In particular, the US (17.1%), the UK (15.0%), Australia (14.8%), and South Africa (10.2%) showed double-digit growth compared with the previous year. This is the exact opposite of the regression that occurred in most countries in the Americas and Europe in the previous year.

Table 4 **Changes in Hallyu Status Index**

		Hallyu Status Index (2019)	Hallyu Status Index (2020)	Hallyu Status Index (2021)	Hallyu Status Index change rate (21-20)	Remarks
Hallyu popularization stage	**Vietnam**	3.62	3.61	3.71	2.8%	
	Malaysia	3.58	3.71	3.67	-1.0%	
	Taiwan	3.36	3.49	3.65	4.5%	1 stage increase
	Indonesia	3.65	3.80	3.57	-6.2%	
	Thailand	3.42	3.39	3.54	4.3%	1 stage increase
	China	3.23	3.43	3.51	2.2%	1 stage increase
Hallyu expansion stage	**UAE**	3.05	3.15	3.46	9.8%	
	India	3.04	3.20	3.36	5.2%	
	US	2.77	2.77	3.25	17.1%	
	Australia	2.80	2.74	3.14	14.8%	
	Brazil	3.12	2.98	3.13	5.0%	
	Japan	2.82	2.88	3.11	8.1%	
	Türkiye	3.12	3.17	3.06	-3.7%	
	South Africa	2.54	2.69	2.97	10.2%	
	UK	2.60	2.49	2.87	15.0%	1 stage increase
	Argentina	–	2.75	2.87	4.4%	
	Russia	2.70	2.82	2.86	1.5%	
	France	2.76	2.68	2.76	2.6%	

*Source: Jeon Jong-geun, Kim Seung-nyeon (2022). *Study on the economic ripple effects of Hallyu in 2021.* (Seoul: KOFICE).

The Hallyu Sentiment Index also rose in almost all countries, demonstrating a high level of interest and the growth of Hallyu. As in the previous year, India remained in the high-growth group, whereas Thailand, Vietnam, and the UAE rose one stage to join the high-growth group; Indonesia fell one stage from the high-growth group to the medium-growth group. Notably, Japan, the only country that has continuously been in the declining Hallyu group for several years, rose one stage to the medium-growth group.

Table 5 **Changes in Hallyu Sentiment Index**

		Hallyu Sentiment Index (2019)	Hallyu Sentiment Index (2020)	Hallyu Sentiment Index (2021)	Hallyu Sentiment Index change rate (21-20)	Remarks
Hallyu high-growth group	**India**	137.13	133.68	143.61	7.4%	
	Thailand	136.87	124.07	138.10	11.3%	1 stage increase
	Vietnam	137.30	121.30	132.40	9.2%	1 stage increase
	UAE	128.00	114.63	131.10	14.4%	1 stage increase
Hallyu medium-growth group	**Türkiye**	135.77	126.77	129.55	2.2%	
	South Africa	125.25	112.21	128.25	14.3%	
	Indonesia	141.90	135.05	127.23	-5.8%	1 stage decrease
	Malaysia	127.55	124.12	127.21	2.5%	
	Australia	115.17	111.04	124.31	12.0%	
	China	121.80	122.20	122.24	0.0%	
	Brazil	133.22	115.27	122.12	5.9%	
	US	115.92	111.22	121.53	9.3%	
	Argentina	–	109.62	121.23	10.6%	
	Taiwan	115.92	108.02	118.23	9.5%	
	UK	115.18	106.12	115.08	8.4%	
	Russia	119.71	110.06	107.38	-2.4%	
	France	115.02	107.97	104.00	-3.7%	
	Japan	88.72	94.37	103.68	9.9%	1 stage increase

*Source: Jeon Jong-geun, Kim Seung-nyeon (2022). *Study on the economic ripple effects of Hallyu in 2021*. (Seoul: KOFICE).

Increase in Hallyu usage indicators

Compared with 2020, the usage diversity of Hallyu contents rose from 4.9 to 5.4 points on average, and usage intensity rose from 35.3 to 41.9 points on average. Usage diversity fell from 5.3 to 4.9 points in 2020 owing to the impact of the COVID-19 pandemic, but this year, it increased to 5.4 points, restored to pre-COVID levels. Compared with the previous year, the average growth rate of usage diversity and usage intensity was 8.6% and 18.5%, respectively, demonstrating Hallyu's growth. In particular, the fact that the increase in usage intensity is more than double the increase in usage diversity proves that certain contents, such as *Squid Game*, are enjoying massive popularity. By country, notably, the US, Australia, and the UK recorded more than a 30% increase in both usage diversity and usage intensity compared with the previous year. All three countries are part of the Anglosphere and have witnessed the rapid spread of Hallyu recently.

Table 6 **Changes in Hallyu usage indicators**

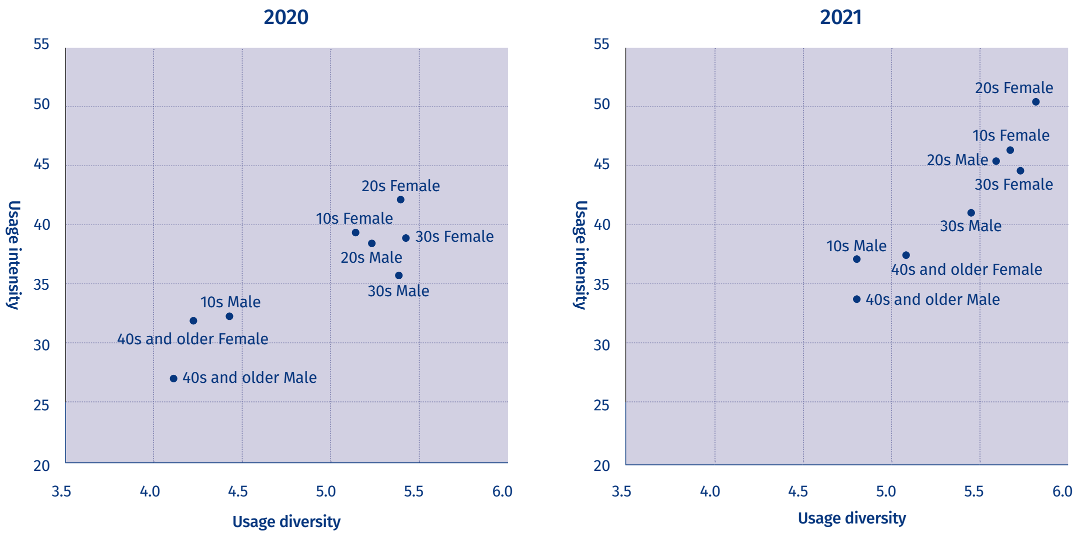
	Hallyu Status Index	Hallyu Sentiment Index	Usage diversity		Usage intensity	
			2020	2021	2020	2021
US	3.2	121.5	3.3	4.9	27.1	41.0
Brazil	3.1	122.1	4.0	4.4	30.7	36.3
Argentina	2.9	121.2	3.6	4.5	28.7	33.4
UK	2.9	115.1	3.3	4.3	23.6	31.5
France	2.8	104.0	3.7	3.9	27.7	29.1
Türkiye	3.1	129.6	4.9	4.8	35.2	41.6
Russia	2.9	107.4	3.5	3.5	26.7	27.4
China	3.5	122.2	6.4	6.7	37.9	42.3
Japan	3.1	103.7	3.5	4.0	18.9	28.6
Taiwan	3.7	118.2	6.8	7.1	40.1	46.2
Thailand	3.5	138.1	7.3	7.3	44.9	53.8
Malaysia	3.7	127.2	6.5	6.8	43.9	50.6
Indonesia	3.6	127.2	7.1	6.6	49.8	52.6
India	3.4	143.6	5.4	5.9	42.6	51.4
Vietnam	3.7	132.4	6.7	6.1	51.1	53.0
Australia	3.1	124.3	3.6	5.1	28.7	39.4
South Africa	3.0	128.3	4.1	4.8	31.3	41.3
UAE	3.5	131.1	5.2	6.1	47.2	54.3
Average	**3.2**	**123.2**	**4.9**	**5.4**	**35.3**	**41.9**

*Source: Jeon Jong-geun, Kim Seung-nyeon (2022). *Study on the economic ripple effects of Hallyu in 2021*. (Seoul: KOFICE).

Reduction in gap of Hallyu contents usage by sex and age

Based on changes in the distribution of Hallyu contents users by sex and age, usage diversity and usage intensity significantly increased for males in their 40s and older and those in their teens, who had low interest in Hallyu in the past. Although Hallyu contents consumption by females in their teens to 30s was identical to that in the previous year, survey results for year also showed increased usage indicators for both males and females in their 40s and males in their teens, which are relatively low-usage groups. The low- and high-user groups were clearly distinguished in 2020, but the gap between them slightly decreased in 2021. Thus, the age and sex gap of Hallyu contents users is narrowing.

Figure 8 **Changes in demographic group distribution according to Hallyu usage indicators**



*Source: Jeon Jong-geun, Kim Seung-nyeon (2022). *Study on the economic ripple effects of Hallyu in 2021*. (Seoul: KOFICE).

BTS temporarily suspends group activities

On June 14, 2022, nine years after their debut, BTS announced a temporary suspension of group activities. Although the group did not disband, many voiced concerns that a temporary suspension of activities would hugely impact K-Pop and all of Hallyu amid its heyday. Indeed, the day after the announcement, the stock price of HYBE (BTS' management company) nosedived by nearly 25%, and almost KRW 2 trillion of market capitalization evaporated (*JoongAng Ilbo*, June 15, 2022)[7].

Figure 9 **Changes in HYBE stock price**

(As of August 23, 2022)

*Source: Naver Finance

The temporary suspension of the group's activities was influenced by several factors, such as members' military service problems and burnout. Jin, the oldest member, needed to enlist by this year; the agency and members chose to pursue individual or unit activities by enlisting sequentially rather than together. J-Hope took the lead in individual activities and achieved results that can dispel much of the public's concern about the group's hiatus. J-Hope's solo debut album *Jack In The Box* sold approximately 370,000 copies in its first week (see Table 7), and the pre-released song "MORE" topped the iTunes Song Chart in 84 countries. The album was commercially successful and received favorable reviews from leading critics such as *NME*, *Rolling Stone*, and Metacritic in terms of artistic merit (*The Korea Economic Daily*, July 21, 2022)[8]. The other members' solo and unit activities, which will continue sequentially in the future, are expected to show comparable performance.

Table 7 **First-week album sales ranking of K-Pop solo singers**

(As of August 23, 2022)

Rank	Artist	Album Name	Release Date	Sales amount (Unit: copies)
1	**Lim Young-woong**	*IM HERO*	2022/5/2	1,102,0**
2	**Baekhyun**	*Bambi*	2021/3/30	868,8**
3	**Lisa**	*LALISA*	2021/9/10	736,2**
4	**Baekhyun**	*Delight*	2020/5/25	704,5**
5	**Kim Ho-joong**	*PANORAMA*	2022/7/27	682,6**
6		*Wooriga*	2020/9/23	532,1**
7	**Young Tak**	*MMM*	2022/7/4	524,2**
8	**Kang Daniel**	*color on me*	2019/7/29	466,7**
9	**Rosé**	*R*	2021/3/16	448,0**
10	**Baekhyun**	*City Lights*	2019/7/10	380,7**
11	**J-Hope**	***Jack In The Box***	**2022/7/29**	**365,9****
12	**Kang Daniel**	*MAGENTA*	2020/8/3	323,1**
13		*The Story*	2022/5/24	316,6*
14		*YELLOW*	2021/4/13	316,5**
15	**D.O.**	*Sympathy*	2021/7/27	310,1**
16	**IU**	*LILAC*	2021/3/26	278,4**
17	**Kang Daniel**	*CYAN*	2020/3/24	261,4**
18	**Kim Ho-joong**	*The Classic Album I*	2020/12/18	260,2**
19		*The Classic Album II*	2020/12/18	258,5**
20	**Nayeon**	*IM NAYEON*	2022/6/24	252,9**

*Source: Hanteo Chart

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[7] *JoongAng Ilbo* (June 15, 2022), "HYBE drops bomb that BTS will halt activities... 2 trillion in market cap evaporates in one day."

[8] *The Korea Economic Daily* (July 21, 2022), "J-Hope, the first to begin BTS' solo careers, receives favorable reviews from foreign media... 'Powerful album'."

Future of K-Pop and Hallyu

Halting the activities of the world's most popular group will unavoidably impact the entire K-Pop scene and Hallyu. However, BTS did not disband but only temporarily suspended group activities, and the individual members still have considerable popularity (see Table 8). Therefore, the suspension of activities will not lead to a crisis in K-Pop or Hallyu as feared by the public. BTS and HYBE are not the only players in the K-Pop scene; Hallyu comprises numerous popular entities. Just as few expected the global success of BTS or *Squid Game*, the success of future artists and contents will also remain impossible to predict. *Nevertheless*, considering the advanced production system of K-Pop and Hallyu contents, expert pool, and scale of gathered domestic and foreign capital, the industry's fundamentals are not so weak that an individual group suspending activities would lead to a crisis in the entire industry.

Table 8 **Favorite Korean singers/groups by country**

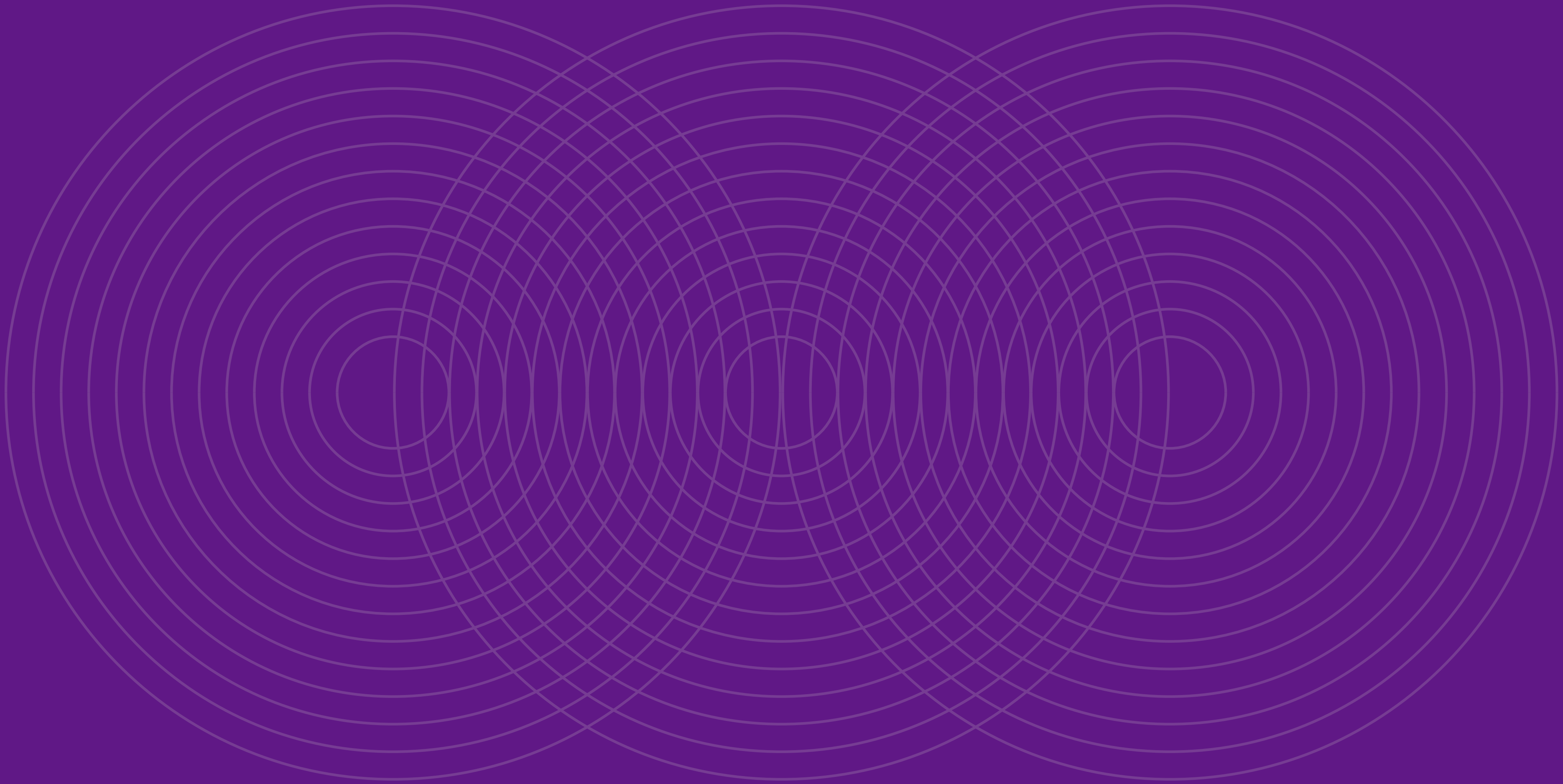
Base: Users with experience with Korean music, n=(), Unit: %

		Asia/Oceania									Americas			Europe				Middle East	Africa
	Total	China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Australia	US	Brazil	Argentina	France	UK	Russia	Türkiye	UAE	South Africa
No. of responses	(4,679)	(337)	(352)	(245)	(308)	(264)	(344)	(315)	(284)	(213)	(321)	(267)	(244)	(189)	(211)	(182)	(244)	(201)	(158)
BTS	26.7	1.8	29.8	17.6	7.8	27.7	36.3	30.8	29.2	21.6	29.6	35.6	44.3	31.7	21.8	28.6	32.4	31.3	30.4
BLACKPINK	10.4	2.4	2.8	4.1	30.5	29.5	20.1	1.3	19.4	7.5	5.6	10.5	4.9	6.3	2.4	5.5	16.4	5.5	3.8
IU	2.8	7.4	0.3	9.0	1.0	3.0	3.2	5.4	2.8	2.3	2.2	2.2	0.4	0.0	1.9	0.5	2.5	2.5	1.3
Lisa	2.4	0.0	0.0	1.2	23.4	1.5	2.0	1.0	2.1	0.5	0.3	1.1	0.8	0.0	0.9	2.2	0.4	1.0	0.0
PSY	2.2	1.5	0.3	0.8	0.3	1.1	0.3	4.4	0.0	2.8	2.2	5.2	0.8	4.2	4.7	3.3	2.9	2.5	8.2
TWICE	2.2	0.0	10.2	11.4	0.6	0.8	2.0	0.3	1.8	0.9	0.9	0.4	2.5	1.6	0.5	1.6	0.8	0.5	0.0
EXO	1.7	6.2	0.0	0.8	0.3	1.9	3.5	0.3	3.9	0.9	0.9	0.4	3.3	0.5	0.5	0.0	2.9	0.5	0.6
BIGBANG	1.6	4.5	1.4	11.4	0.3	2.3	1.5	0.3	4.9	4.2	0.0	0.4	1.6	0.0	0.5	0.0	2.9	0.5	1.3
Girls Generation	1.1	3.6	1.4	0.8	1.0	0.4	0.9	0.3	3.9	0.5	0.0	0.0	0.8	0.0	0.5	0.0	0.4	0.0	0.0
G-Dragon	1.0	4.5	0.3	1.2	0.3	0.8	0.0	0.3	1.1	0.9	0.6	0.0	0.4	0.5	1.4	0.0	0.0	3.5	5.7
Jeon Jungkook	**0.6**	**0.0**	**0.0**	**3.7**	**0.6**	**0.4**	**0.3**	**2.5**	**0.4**	**0.0**	**0.3**	**0.4**	**0.4**	**0.0**	**1.4**	**2.2**	**0.8**	**1.0**	**1.9**
GOT7	0.6	0.0	0.3	0.4	4.2	0.8	0.6	0.0	0.0	0.0	0.3	0.4	0.8	0.0	0.0	0.0	0.4	1.5	0.0
Super Junior	0.6	1.8	0.0	1.2	0.3	0.4	1.7	0.0	1.4	0.0	0.3	0.4	0.8	0.0	0.0	0.0	0.4	0.0	0.0
Kim Taehyung (V)	**0.5**	**2.4**	**0.0**	**0.4**	**0.0**	**0.0**	**0.6**	**1.6**	**0.0**	**0.0**	**0.3**	**0.7**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.5**	**0.6**
Park Jimin	**0.4**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.3**	**0.4**	**0.5**	**0.6**	**2.6**	**0.4**	**0.0**	**0.0**	**0.0**	**2.0**	**0.0**	**1.3**

*Source: KOFICE (2022). *2022 Overseas Hallyu Survey.*

Section 2

Analysis of Hallyu Trends by Region and Country



CHAPTER 1

Perception of Hallyu (Korea)

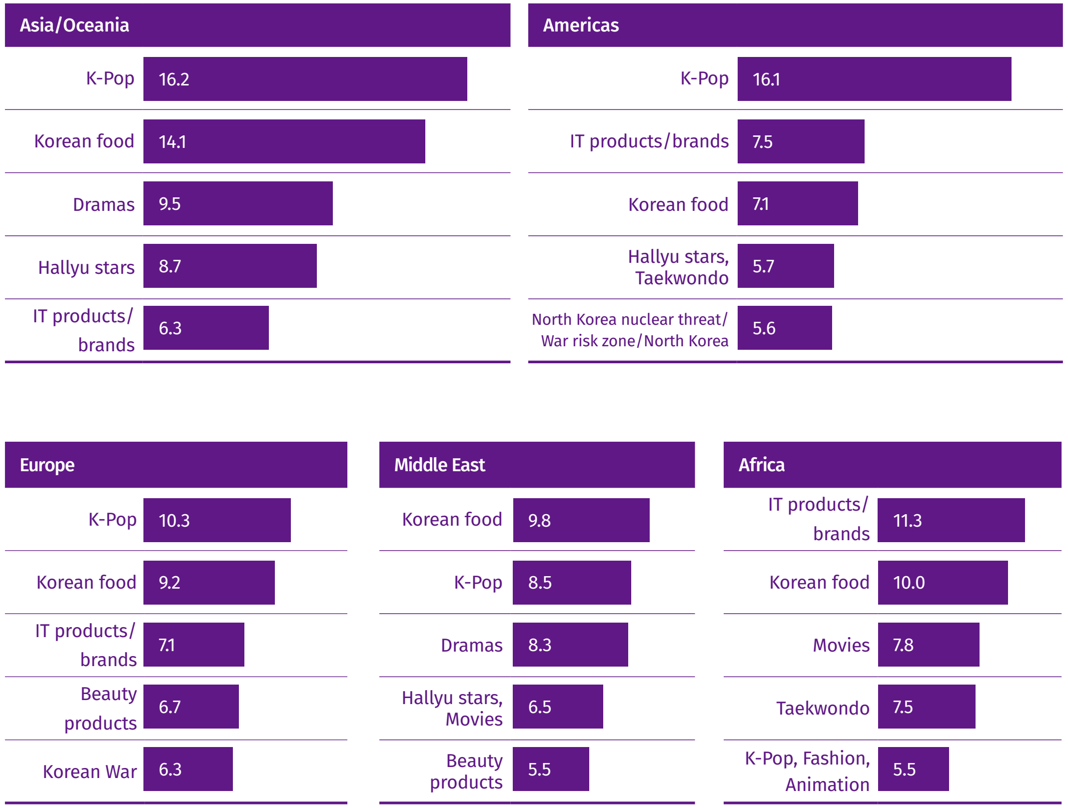
Images associated with Korea

Five regions

In all regions except Africa and the Middle East, K-pop was the most frequent response to the question 'images associated with Korea'. K-pop has maintained the top spot for five years since 2017. In year, although K-pop declined by 2.8% from the previous year's survey and the number of regions where it ranked dropped from four to three, its influence remained substantial. The association rate of K-pop with Korea decreased in all regions, particularly in Africa, which showed a comparatively large decline of 5.5%.

Korean food was one of the images most frequently associated with Korea, showing similar results to the previous year's survey. It ranked first in the Middle East, second in Asia, Europe, and Africa, and third in the Americas. Owing to the global sensation of *Squid Game*, the association rate of dramas increased by 1.1% compared with the previous year, rising two spots from fifth to third (Figure 1).

Figure 1



(Top 5, Unit: %)

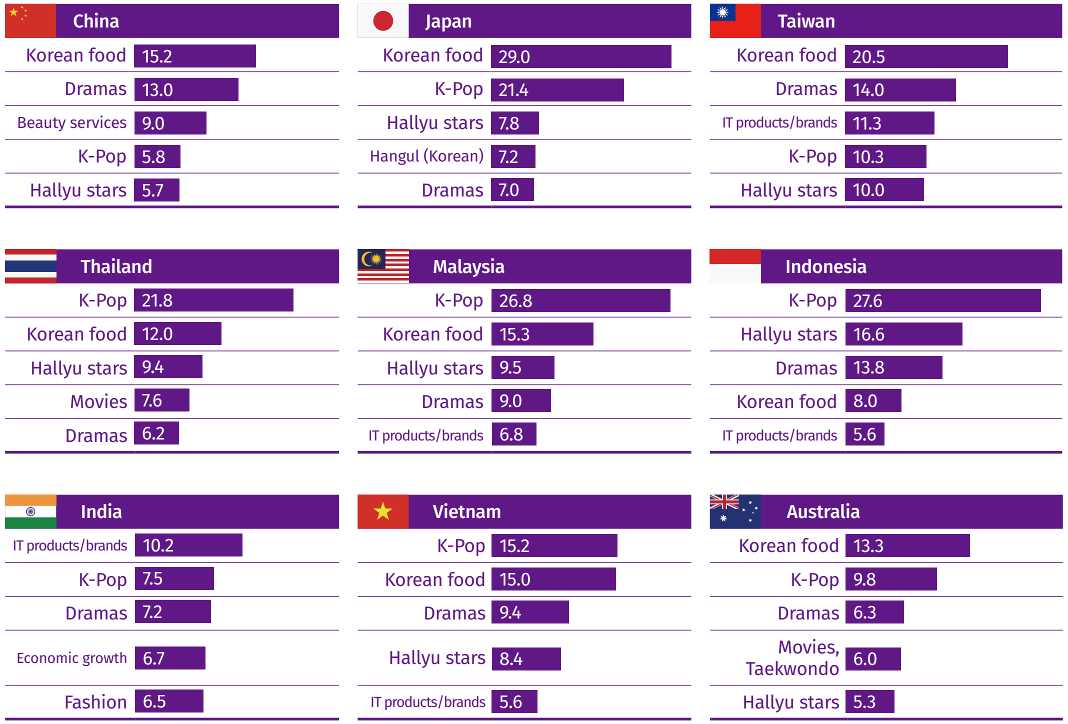
Asia and Oceania

K-pop was the image most frequently associated with Korea, followed by Korean food, dramas, Hallyu stars, and IT products/brands (Figure 2). As in the previous year's survey, K-pop and Korean food ranked first in four countries, showing a clear divide among the top-ranking associated images. K-pop recorded the highest association rate in ASEAN countries, such as Thailand, Malaysia, Indonesia, and Vietnam. Korean food topped the ranking in East Asia, such as in China, Japan, and Taiwan. In particular, in Japan, the response rate for Korean food recorded a high response rate of 30%, confirming the popularity of Korean food in Japan.

Over the past five years, only India showed the highest association rate for IT products/brands. However, the response rate decreased slightly compared with the previous year (1.8%). Meanwhile, excluding India, dramas and Hallyu stars also showed high association rates in most countries in the region.

Figure 2

(Top 5, Unit: %)

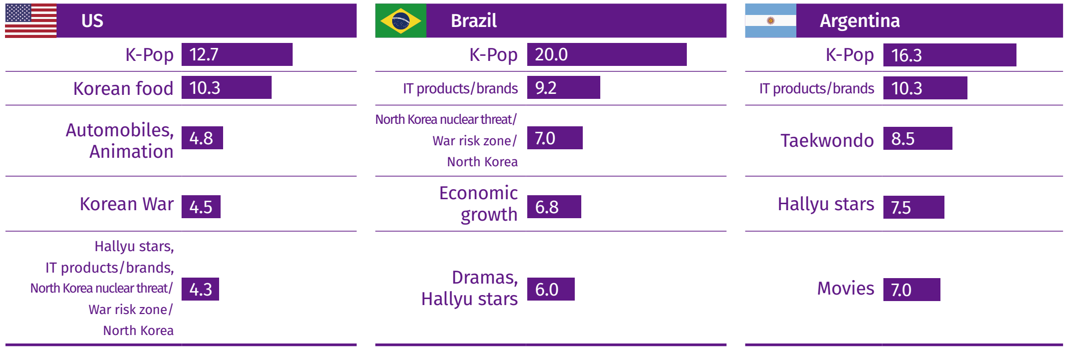


Americas

As in the previous year, K-pop was the most frequently associated image with Korea (Figure 3). By country, the response rate for K-pop decreased by 2.5% in the US compared with the previous year, although it reclaimed the top spot that had been taken by Korean food. Brazil's response rate for K-pop decreased by 7.2% from the previous year but remained high, maintaining the first place. The response rate of K-pop in Argentina, which was first included in the survey in 2020, ranked first for the second consecutive year at 16.3%. Meanwhile, IT products/brands and Hallyu stars ranked within the top five in all three countries. In particular, in Brazil and Argentina, IT products/brands ranked second after K-pop, evidencing the high awareness of IT products/brands across the Americas.

Figure 3

(Top 5, Unit: %)



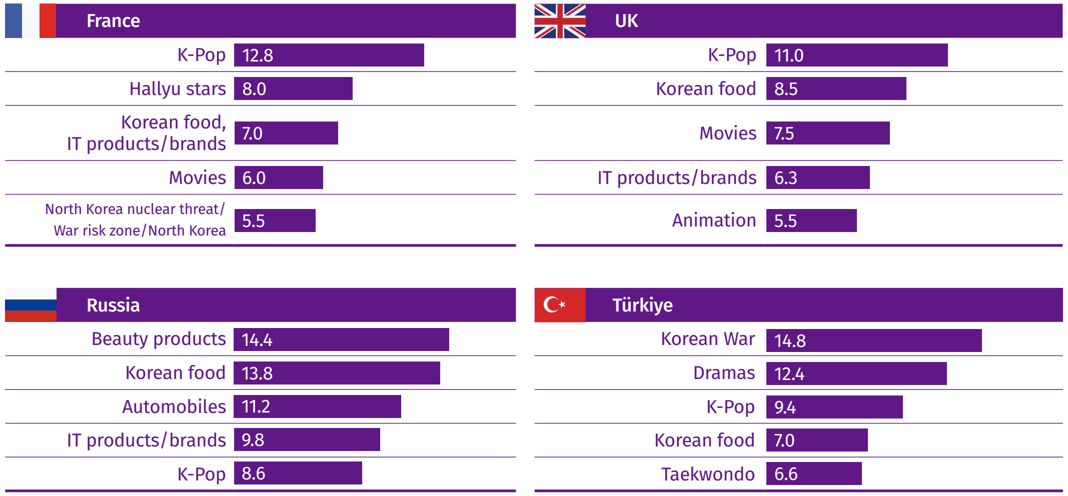
Europe

K-pop and Korean food were the most frequently associated images with Korea, and IT products/brands climbed the rankings in the three surveyed countries other than Türkiye (Figure 4). In France and the UK, K-pop remained in the first place following the previous year's survey. However, the association rate of K-pop in France has dropped every year since 2017, falling by 0.6% in this survey from the previous year. Conversely, the association rate of Hallyu stars increased by 2.6% and climbed five places from seventh in the previous year. IT products/brands ranked third in France and fourth in the UK and Russia, indicating high awareness in most of Europe.

In Russia, beauty products and automobiles ranked first and third, respectively, displaying a different trend from the other countries, as in the previous year. Meanwhile, the Korean War ranked first in Türkiye, as in last year's survey, suggesting that the image of Korea as a military ally remains strong in Türkiye.

Figure 4

(Top 5, Unit: %)



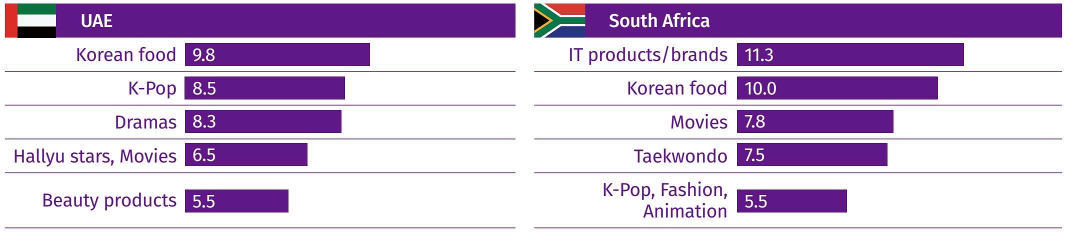
Middle East and Africa

In the UAE, Korean food took first place from K-pop, which had the highest association rate for four consecutive years, and the response rate also slightly increased (2.5%). Korean food was followed by K-pop, dramas, Hallyu stars, and movies, and the response rates for cultural contents overall increased compared with the previous year, when association rates of consumer goods were high (Figure 5).

Following the previous year, IT products/brands ranked first in South Africa. This was followed by Korean food, movies, Taekwondo, K-pop, fashion, and animation, the top-ranking categories. Notably, K-pop, which ranked second with an association rate of 11.0% in the previous year's survey, dropped by 5.5%.

Figure 5

(Top 5, Unit: %)



Negative perceptions of Hallyu contents and their causes

Five regions

The rate of negative perceptions toward Hallyu contents averaged 30.7% across 18 countries, an increase from 26.6% in 2019 and 24.4% in 2020 (Table 1). The rate in Asia and Oceania has been rising since the previous year's survey, although the increase was larger in this survey (6.2%). The Americas showed a large decline in the previous year (10.9%) and then a considerable increase (8.6%). The rate in Europe also increased by 2.8% compared with the previous year. The Middle East and Africa also showed large increases (10.7% and 10.8%, respectively).

The causes of negative perceptions toward Hallyu contents were similar to the previous year's survey results (Figure 1). The excessive commercial and provocative nature of Hallyu and the need to protect the domestic contents industry were the most common reasons in most regions. The inappropriate remarks and behavior of Hallyu stars and influencers were also common reasons in Asia and Oceania, Europe, and the Middle East regions.

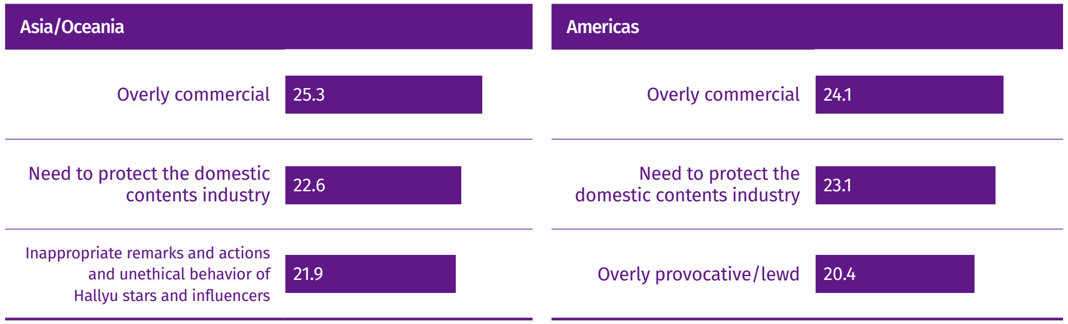
Table 1 Rate of negative perceptions toward Hallyu

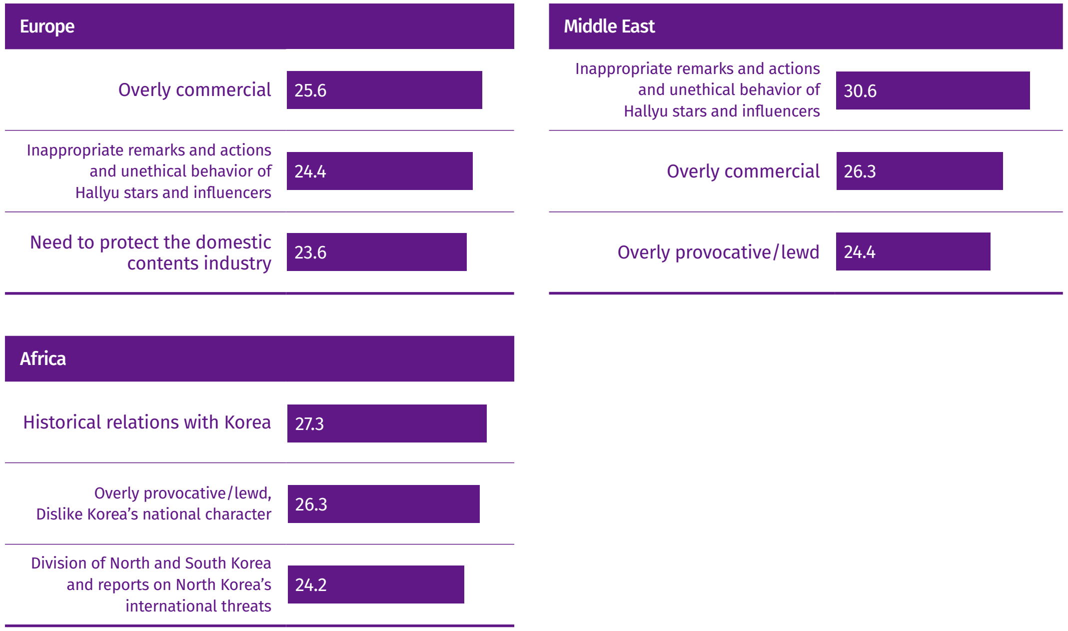
(Unit: %)

	Asia/Oceania	Americas	Europe	Middle East	Africa
2019	29.2	27.4	22.1	27.5	15.0
2020	29.9	16.5	18.9	29.3	14.0
2021	36.1	25.1	21.7	40.0	24.8

Figure 1 Reasons for negative perceptions toward Hallyu

(Top 3, multiple responses, unit: %)





Asia and Oceania

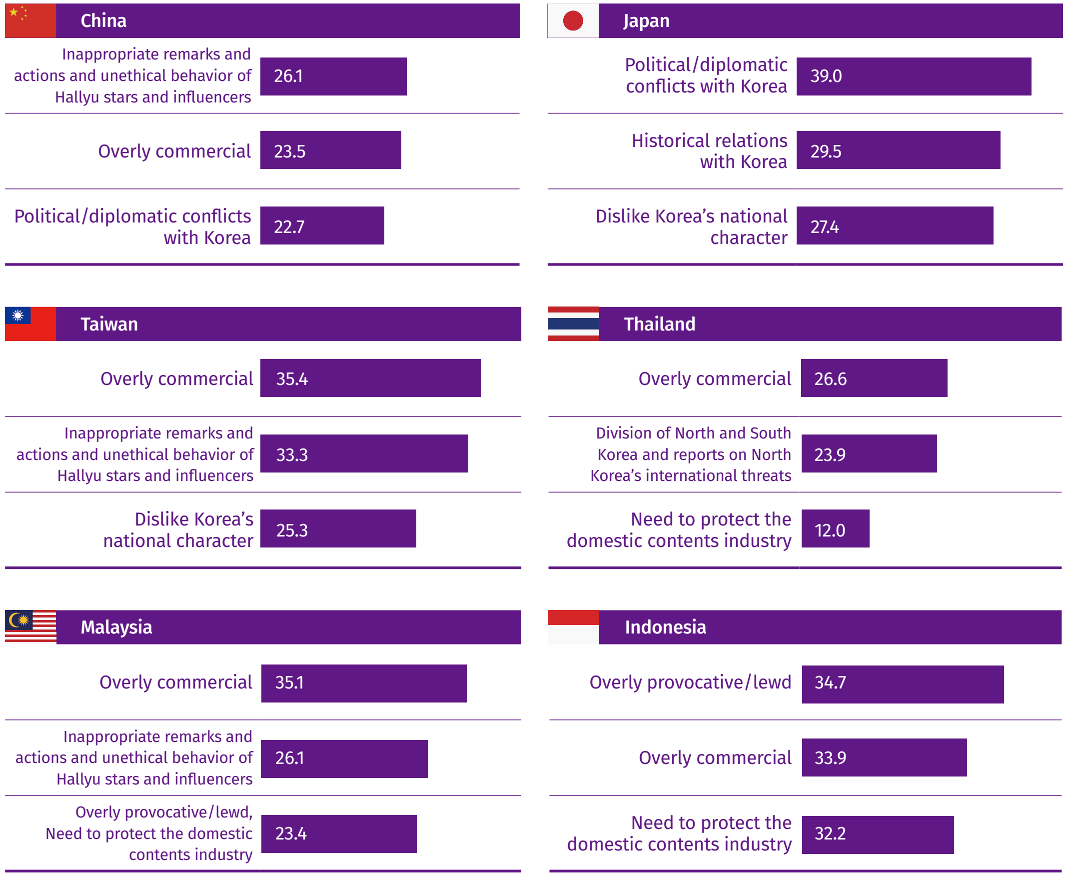
India (51.5%), Australia (45.0%), Vietnam (39.8%), China (39.7%), and Thailand (36.8%) showed higher rates of negative perceptions than the regional average (35.4%). However, Japan (29.2%), Malaysia (27.8%), Taiwan (24.8%), and Indonesia (24.2%) showed lower rates than the average (Table 2).

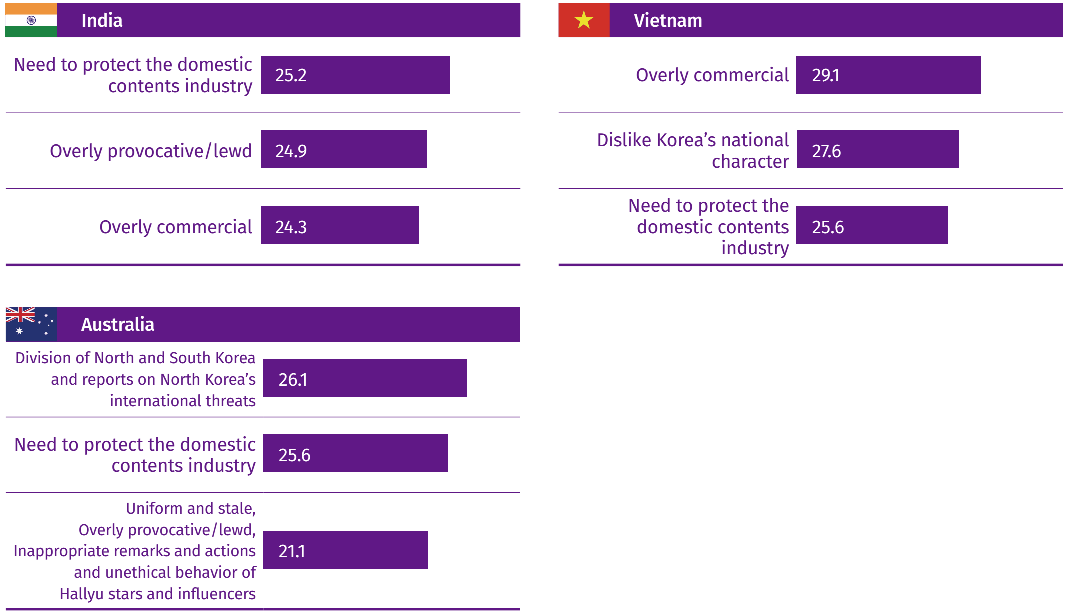
In particular, in China, Thailand, India, and Vietnam, the rate of negative perceptions has been rising since 2019. In countries other than China, the need to protect the domestic industry appears to have influenced the increase in negative perceptions. Meanwhile, the inappropriate remarks and actions and unethical behavior of Hallyu stars and influencers recorded high rankings in China, Taiwan, Malaysia, and Australia. Thus, negative issues related to Hallyu stars showed a negative ripple effect on Hallyu (Figure 2).

Table 2 Rate of negative perceptions toward Hallyu in Asia and Oceania (Unit: %)

	China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Australia
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
2021	39.7	29.2	24.8	36.8	27.8	24.2	51.5	39.8	45.0

Figure 2 Reasons for negative perceptions toward Hallyu in Asia and Oceania (Top 3, unit: %)





Americas

The rate of negative perceptions was 23.6%, a 7.1% increase from 16.5% in the previous year. The response rate rose by 13.6% in the US and 5.6% in Brazil from the previous year. Argentina's response rate of 13.5%—noticeably lower than those of the US and Brazil for the second consecutive year—indicated that overall perceptions of Hallyu there are positive (Table 3).

Regarding the causes of negative perceptions toward Hallyu (Figure 3), the contents' overly commercial nature was the most common reason in all three countries, and the need to protect the domestic contents industry was also a frequent reason in the US and Brazil. Brazilian respondents particularly cited the need to protect their domestic contents industry as the top reason, indicating widespread concern about Hallyu contents' encroachment of the domestic market.

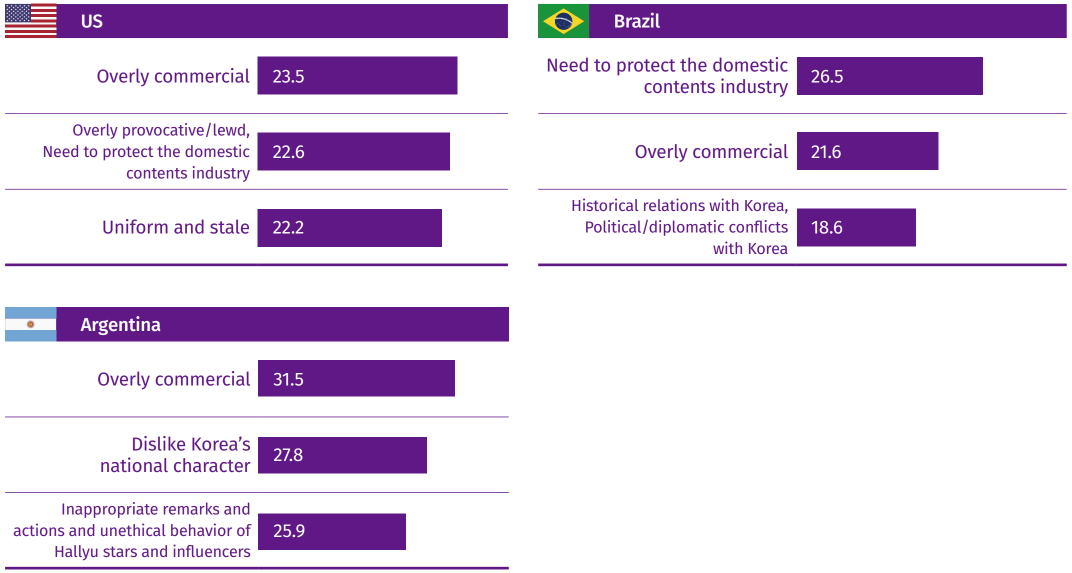
Table 3 Rate of negative perceptions toward Hallyu in the Americas

(Unit: %)

	US	Brazil	Argentina
2019	30.6	24.2	-
2020	23.2	14.8	11.4
2021	36.8	20.4	13.5

Figure 3 Reasons for negative perceptions toward Hallyu in the Americas

(Top 3, unit: %)



Europe

The rate of negative perceptions toward Hallyu was 22.5%, a slight increase of 3.6% from the previous year's survey and below the overall average of 30.7%. France and Russia showed steady declines for the third consecutive year since 2019, whereas the negative response rate in the UK nearly doubled (16.4%) from the previous year. Türkiye, which recorded a decrease in negative perception rates in the previous year's survey, showed a slight increase in this survey (Table 4).

In all countries, "overly commercial" ranked as a reason for negative perceptions; the top reason differed in each country. "Political/diplomatic conflicts with Korea" recorded the highest response rate in Russia. Notably, the survey took place before Russia's invasion of Ukraine, and the recognition of Korea as pro-American seems to have had an impact. "Inappropriate remarks and actions and unethical behavior of Hallyu stars and influencers" was also included in the rankings in the UK, Russia, and Türkiye (Figure 4).

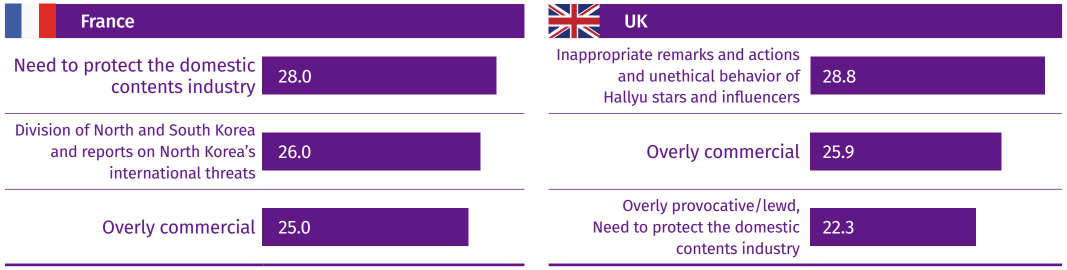
Table 4 Rate of negative perceptions toward Hallyu in Europe

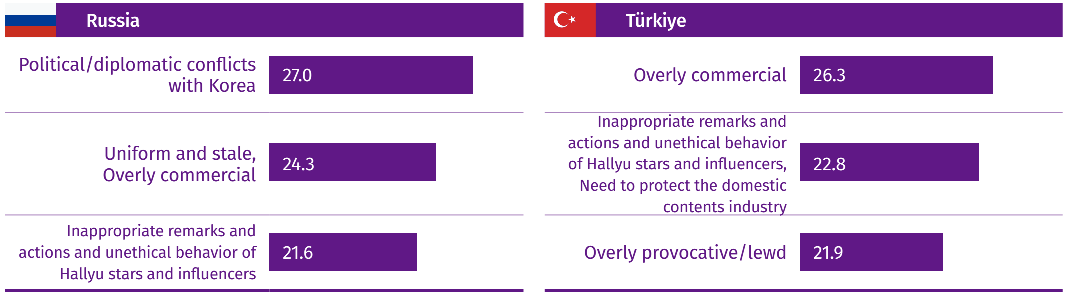
(Unit: %)

	France	UK	Russia	Türkiye
2019	27.8	21.8	11.5	25.8
2020	25.2	18.4	8.5	22.0
2021	25.0	34.8	7.4	22.8

Figure 4 Reasons for negative perceptions toward Hallyu in Europe

(Top 3, unit: %)





Middle East and Africa

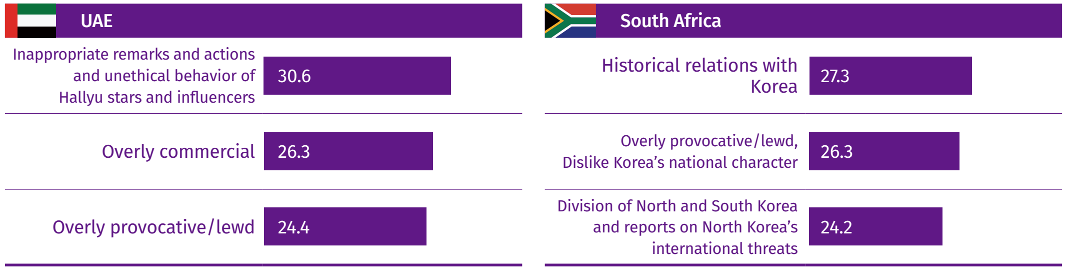
The rate of negative perceptions toward Hallyu rose for four consecutive years in the Middle East, reaching 40.0%. In Africa, the rate had declined until last year but increased by 10.8% to 24.8% in this year's survey (Table 5).

"Overly provocative/lewd contents" was a reason shared between both regions for negative perceptions of Hallyu. "Inappropriate remarks and actions and unethical behavior of Hallyu stars and influencers" in the Middle East and "Historical relations with Korea" in Africa showed strong ripple effects, demonstrating a significant difference (Figure 5).

Table 5 **Rate of negative perceptions toward Hallyu in the UAE and South Africa** (Unit: %)

	UAE	South Africa
2019	27.5	15.0
2020	29.3	14.0
2021	40.0	24.8

Figure 5 **Reasons for negative perceptions toward Hallyu in the UAE and South Africa** (Top 3, unit: %)



Changes in perception of Korea after using Hallyu contents

Five regions

Table 1

(Unit: %, points)

Year	Impact	Asia/Oceania	Americas	Europe	Middle East	Africa
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
2021	Negative	4.9	6.7	5.9	4.0	2.5
	No change	28.3	27.7	41.8	19.5	24.0
	Positive	66.7	65.5	52.3	76.5	73.5
	5-point scale	3.88	3.84	3.62	4.01	3.96

Regarding changes in perceptions of Korea after using Hallyu contents, the Middle East recorded the largest positive change rate, followed by Asia and Oceania, the Americas, and Europe (Table 1). In all regions, the positive change rate increased from 3% to 23.2% compared with the previous year. In particular, the Middle East and Africa recorded an increase rate of approximately 20%, a larger change compared with any other region.

Asia and Oceania

Table 2

(Unit: %, points)

Year	Impact	China	Japan	Taiwan	Thailand	Malaysia	Indonesia	India	Vietnam	Australia
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	4.10	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
2021	Negative	9.0	7.8	3.5	2.4	2.8	3.2	5.7	2.4	6.3
	No change	29.0	60.6	36.3	15.2	31.5	27.0	11.2	17.4	33.5
	Positive	62.0	31.6	60.3	82.4	65.8	69.8	83.2	80.2	60.3
	5-point scale	3.69	3.30	3.72	4.18	3.81	3.95	4.23	4.19	3.76

Indian consumers showed the most positive change after experiencing Hallyu contents (Table 2). India recorded positive and negative change rates of 83.2% and 5.7%, respectively, and a high score of 4.23 on a five-point scale. This is the highest score in Asia and Oceania and among all surveyed countries, indicating the enormous positive influence of Hallyu contents in India.

Conversely, although the positive change rate among Japanese consumers increased for three consecutive years, Japan still recorded the lowest rate among all surveyed countries at 3.30 on a five-point scale. Moreover, most respondents who used Hallyu contents reported no change in their perception of Korea (60.6%), whereas 31.6% reported a positive change and 7.8% a negative change.

Americas

Table 3

(Unit: %, points)

Year	Impact	US	Brazil	Argentina
2019	Negative	5.2	2.2	-
	No change	45.0	19.2	-
	Positive	49.8	78.6	-
	5-point scale	3.60	4.10	-
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
2021	Negative	11.2	4.8	2.5
	No change	31.5	22.8	28.3
	Positive	57.3	72.4	69.3
	5-point scale	3.70	3.99	3.87

In all three surveyed countries, the positive change rate of perception after using Hallyu contents significantly increased compared with the previous year (Table 3). In the US, the positive change rate increased by approximately 14% from 43.0% in 2020 to 57.3% in 2021, a rise of about 0.3 on a five-point scale. Similarly, in Brazil and Argentina, the positive change rate increased by 15.4% and 21.1%, respectively, compared with the previous year, corresponding to an increase of 0.37 and 0.45 points on a five-point scale. These two countries recorded higher values than the 18 countries' average of 3.83, indicating that the positive influence of Hallyu contents in the region is large.

Europe

Table 4

(Unit: %, points)

Year	Impact	France	UK	Russia	Türkiye
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	3.50	3.60	3.60	4.00
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
2021	Negative	9.0	7.0	4.0	4.6
	No change	49.5	39.5	50.0	29.2
	Positive	41.5	53.5	46.0	66.2
	5-point scale	3.40	3.63	3.50	3.92

In all four surveyed European countries, the positive change rate increased from the previous year (Table 4). France and Russia recorded positive change rates of 40% to 50%, or 3.4 and 3.5 points on a five-point scale, respectively. The UK recorded the highest positive change rate—an increase of approximately 16% (0.3 on a five-point scale) compared with the previous year.

Following 2019 and 2020, Türkiye recorded the highest positive change rate, with 66% of Turkish respondents reporting that their perception of Korea improved after using Hallyu contents. This is a 2.4% increase from the previous year; although small, it is high in absolute value compared with the other European countries. On the five-point scale as well, it scored close to 4, at 3.92 points.

Middle East·Africa

Table 5

(Unit: %, points)

Year	Impact	UAE	South Africa
2019	Negative	4.8	1.3
	No change	26.3	25.0
	Positive	69.0	73.8
	5-point scale	3.80	3.90
2020	Negative	7.5	5.8
	No change	39.3	37.3
	Positive	53.3	57.0
	5-point scale	3.62	3.68
2021	Negative	4.0	2.5
	No change	19.5	24.0
	Positive	76.5	73.5
	5-point scale	4.01	3.96

Respondents' positive change rate in perception after experiencing Hallyu contents also increased (Table 5). First, the Middle East (UAE) recorded a score of 3.62 on a five-point scale last year, which increased to 4.01 this year, indicating the broad spread of positive perceptions. The positive change rate increased by 23.2%, and the negative change rate decreased by 3.5%, showing a large rise in the positive change rate over the past year.

Africa (South Africa) also showed similar changes to the Middle East. On a five-point scale, the score increased by approximately 0.3 points from 3.68 in the previous year to 3.96, and the positive change rate increased by 16.5%. Conversely, the negative change rate declined to 2.5%, about half of 5.8% in the previous year, demonstrating that contact with Hallyu contents in Africa had a huge positive effect on changing perceptions of Korea.

CHAPTER 2

Hallyu consumption

Consumption behavior of Hallyu contents

Asia and Oceania

Consumption of Hallyu contents accounted for 29.87% of all cultural contents consumption (Figure 1). Beauty (35.12%) was consumed the most, followed by dramas, fashion, movies, and entertainment programs, evidencing the active overall consumption of Korean video contents and lifestyle products.

Meanwhile, online and mobile platforms were the most common channels to access Korean dramas, entertainment programs, movies, music, and animations. However, across all categories, 58–74% of the respondents accessed contents via TV, indicating the deepening coexistence of new and traditional media (Figure 2).

The respondents primarily accessed Korean fashion, beauty, and food through videos and photos on social media, accompanied by access through Korean video contents. The respondents used local websites to access publications 15% more often than global websites, and they mostly played games online and via mobile platforms directly.

Figure 1 Consumption of Hallyu contents in Asia and Oceania (Unit: %)

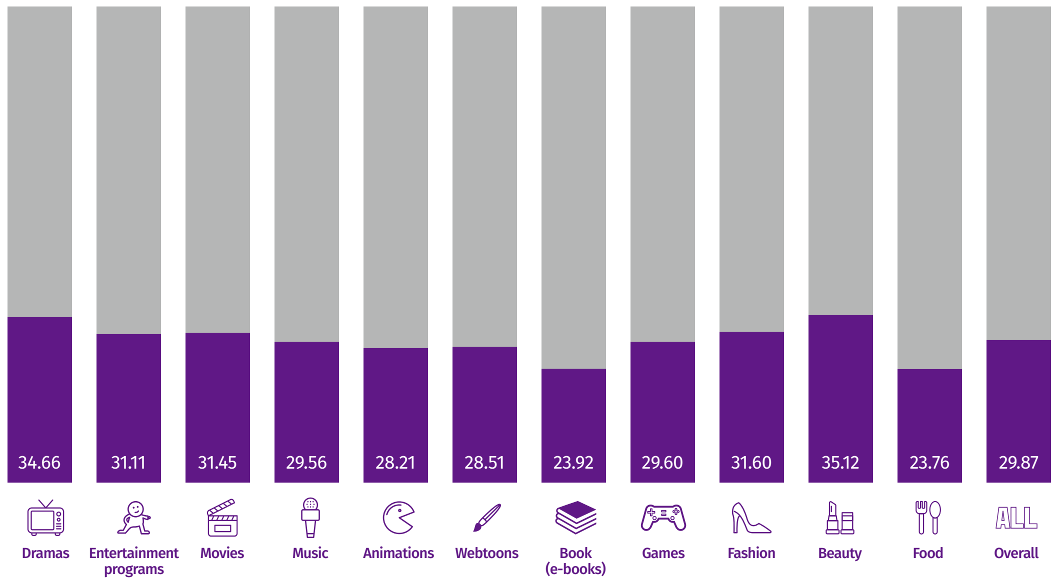
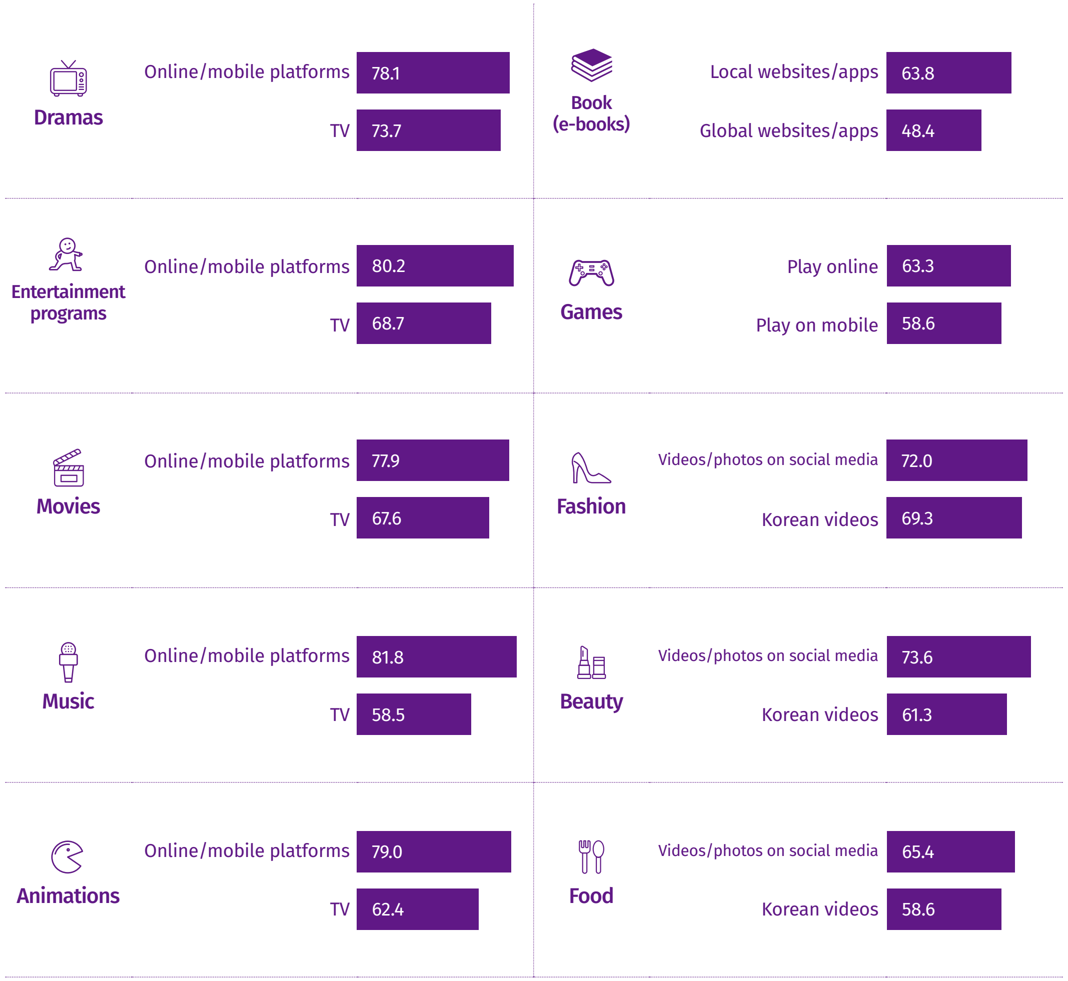


Figure 2 **Channels to Hallyu contents in Asia and Oceania** (Multiple responses, unit: %)



Americas

Consumption of Hallyu contents accounted for 23.88% of all cultural contents consumption, and as in Asia and Oceania, consumption of beauty (28.36%) was the highest. This was followed by fashion, entertainment programs, dramas, webtoons, and movies. Among the surveyed regions, the Americas recorded the second-lowest share of Hallyu contents consumption (Figure 3).

Meanwhile, respondents also mainly accessed Korean video and music contents through online and mobile platforms. Approximately 80% of the respondents accessed Korean dramas, entertainment programs, movies, music, and animations through online and mobile platforms, followed by access via TV. In particular, over 80% of consumers used music through online and mobile platforms.

Videos and photos on social media were the most common channels to access Korean fashion, beauty, and food. Many users watched YouTube videos by individuals (beauty, food) and Korean video contents (fashion). Most respondents directly played games through online and mobile platforms, whereas publications were frequently accessed through global and local sites (Figure 4).

Figure 3 **Consumption of Hallyu contents in the Americas** (Unit: %)

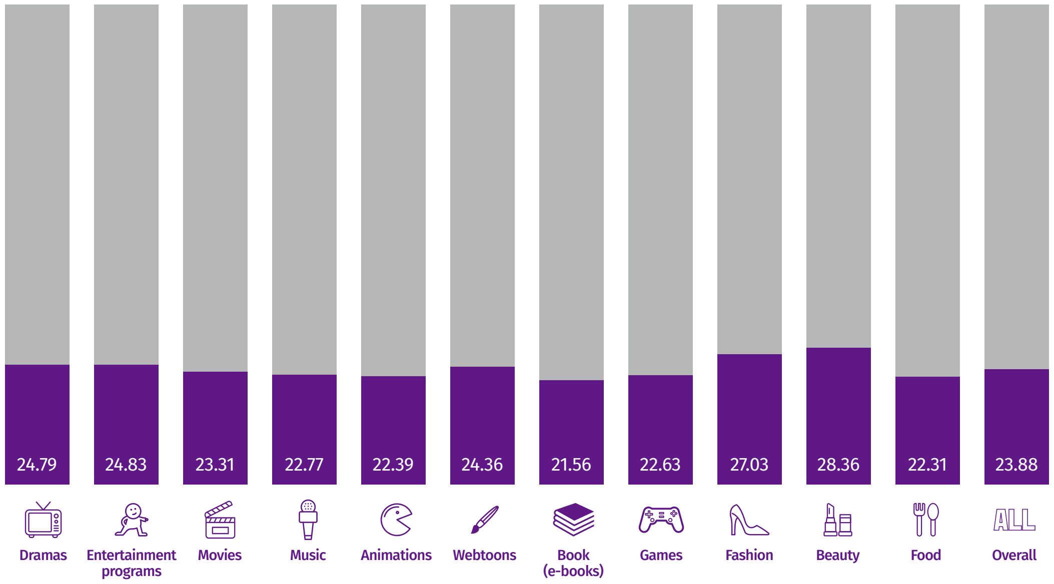
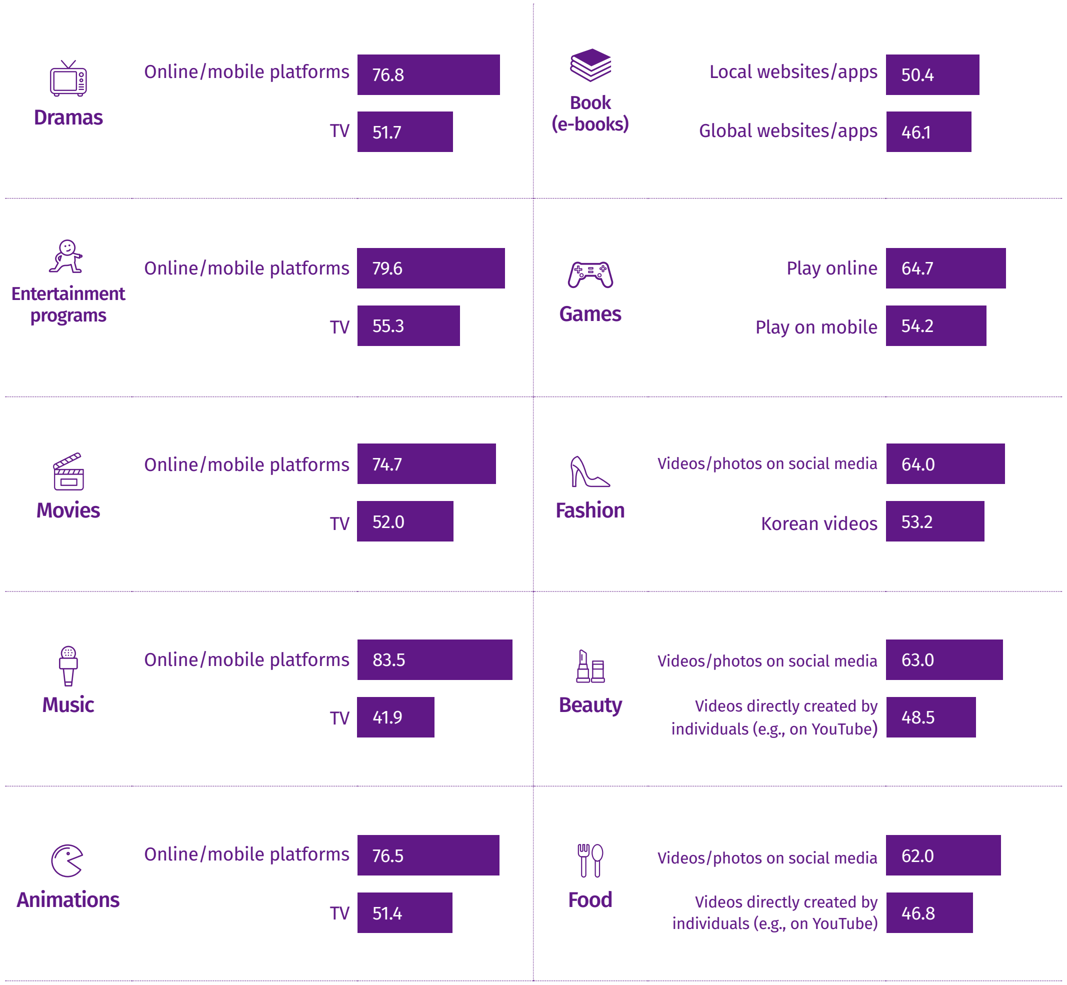


Figure 4 Channels to Hallyu contents in the Americas

(Multiple responses, unit: %)



Europe

Consumption of Hallyu contents accounted for 21.21% of all cultural contents consumption, with dramas accounting for the highest proportion (24.14%). The shares of Korean contents consumption by category ranged from 15% to 24%, which was the lowest among the five regions (Figure 5).

Regarding contents channels, like the other regions, respondents in Europe accessed Korean video and music contents through online and mobile platforms. Except for movies, the rate of access via online and mobile platforms for dramas, entertainment shows, animations, and music was higher than 70%. Access via TV, the second-highest channel, was also frequent, although the difference with online and mobile platforms was considerably large at 10–40% by category.

Videos and photos on social media were the most common channel to access Korean fashion, beauty, and food, and many users also watched YouTube videos by individuals (beauty, food) and Korean video contents (fashion). Most respondents directly played games through online and mobile platforms, while publications were mostly accessed through local and global sites (Figure 6).

Figure 5 Consumption of Hallyu contents in Europe

(Unit: %)

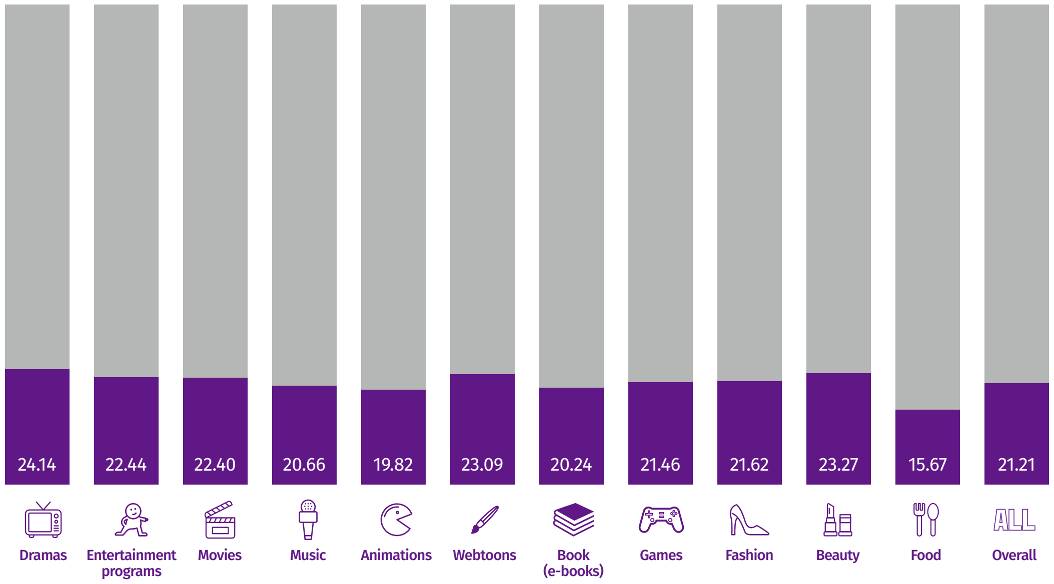
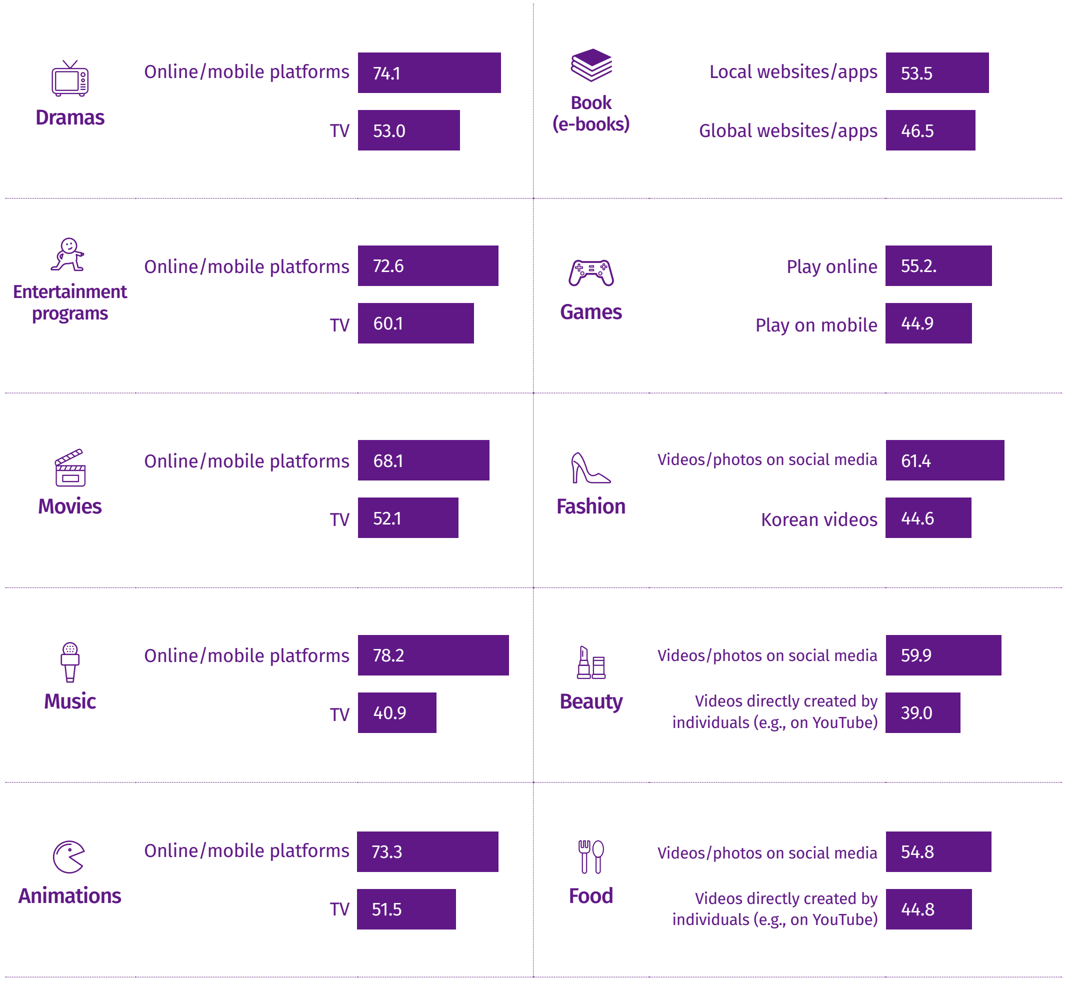


Figure 6 **Channels to Hallyu contents in Europe**

(Multiple responses, unit: %)



Middle East

Consumption of Hallyu contents accounted for 34.33% of all cultural contents consumption. Movies (40.54%) were consumed the most, followed by beauty (36.36%), music (35.56%), and entertainment programs (35.46%). All three categories exceeded 35%, demonstrating the active consumption of these contents relative to other types (Figure 7).

As in other regions, respondents in the Middle East primarily accessed Korean video and music contents through online and mobile platforms. Excluding movies, over 80% of consumers used online and mobile platforms to access dramas, entertainment programs, music, and animations. In particular, the proportion for music exceeded 85%.

The channels of access to Korean fashion, beauty, food, and games in the Middle East differed from those of the other regions. Korean video contents was the most common channel to access fashion, beauty, and food, whereas it ranked second or third in other regions. Meanwhile, direct play via online channels was the most common way to access games, as in other regions. However, a marked difference with other regions is that Korean game videos ranked as the second-most common channel to access games (Figure 8).

Figure 7 **Consumption of Hallyu contents in the Middle East**

(Unit: %)

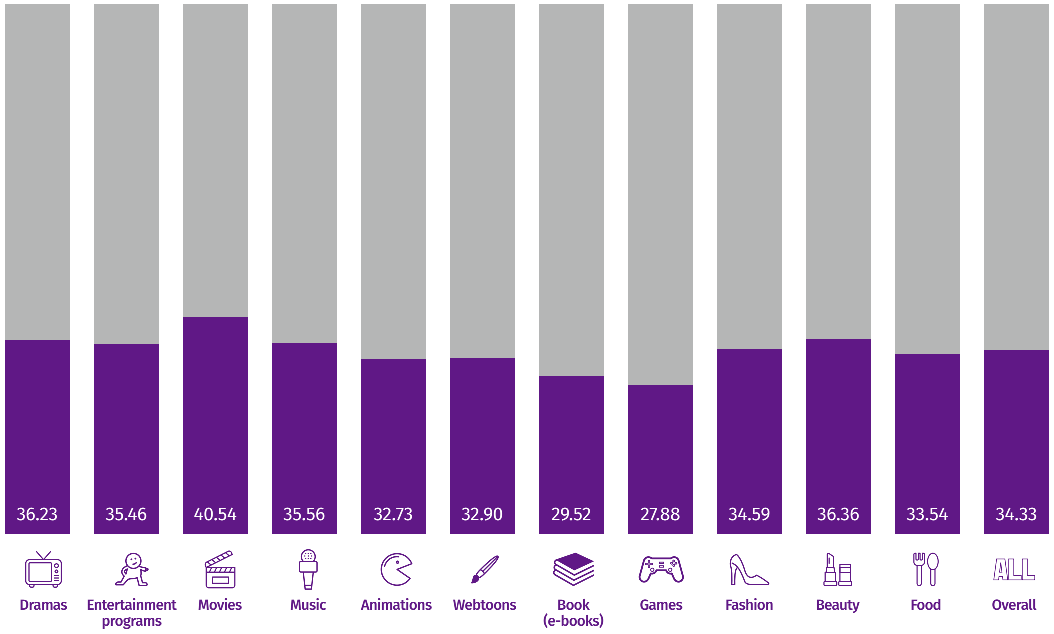


Figure 8 **Channels to Hallyu contents in the Middle East** (Multiple responses, unit: %)

Africa

Consumption of Hallyu contents accounted for 26.01% of all cultural contents consumption, lower than the average of the five regions (27.4%). Fashion (31.53%) was consumed the most, followed by beauty (30.21%), movies (29.59%), and dramas (27.56%), indicating the comparatively active consumption of this contents (Figure 9).

As in the other four regions, respondents in Africa reported high use of online and mobile platforms to access Korean video and music contents (66.5% to 79.1%), the most frequent channel, although the gap with TV was small compared with the other regions.

Videos and photos on social media were the most common channel to access Korean fashion, beauty, and food, and many users also watched YouTube videos by individuals to access this contents. Similar to the results in other regions, most users directly played games on online and mobile platforms. Publications were mostly accessed through local and global sites (Figure 10).

Figure 9 **Consumption of Hallyu contents in Africa** (Unit: %)

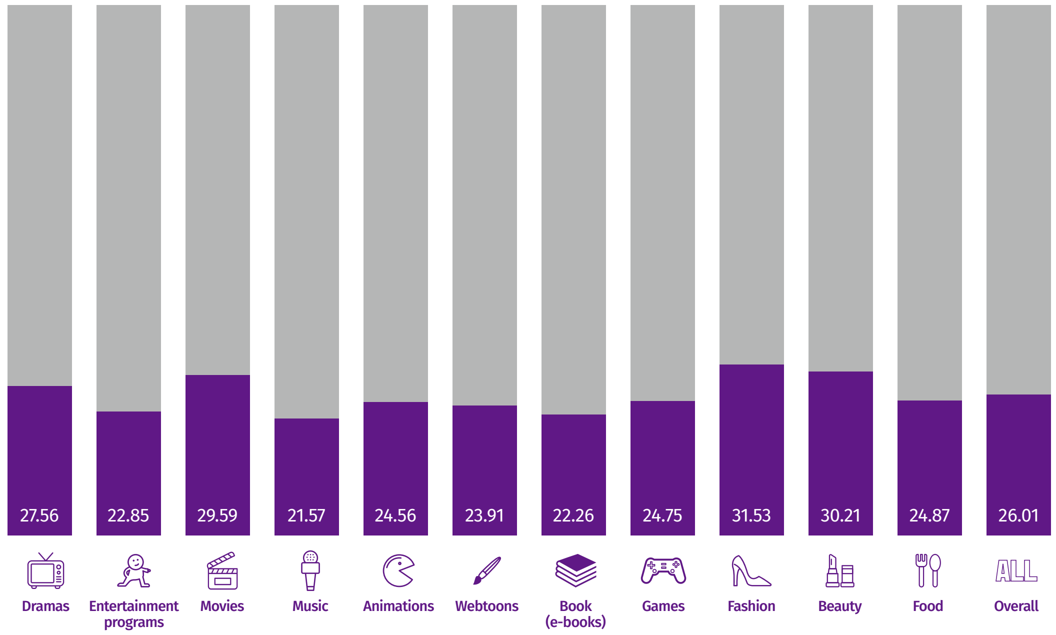
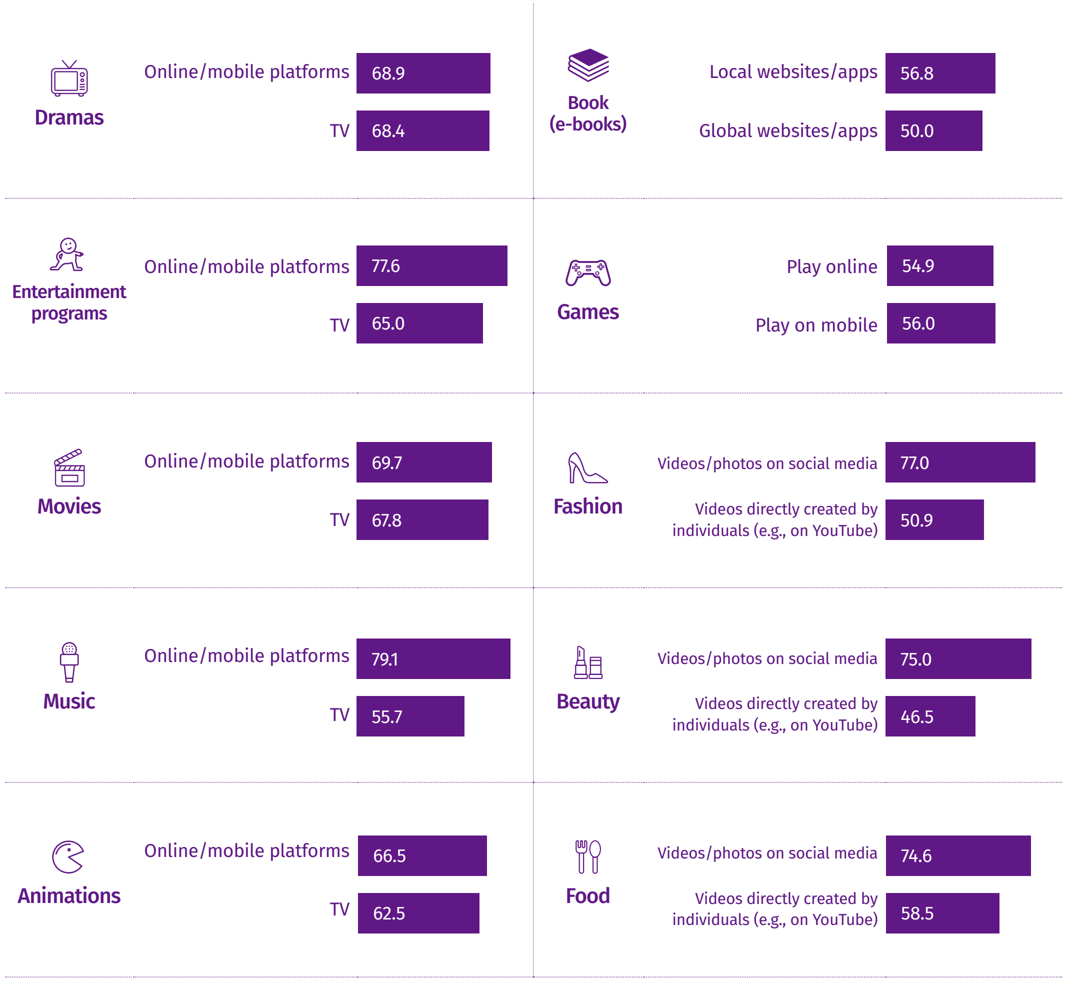


Figure 10 Channels to Hallyu contents in Africa (Multiple responses, unit: %)



Spread of Hallyu usage

The spread of Hallyu usage can be indicated by Hallyu spread indicators (usage diversity and usage intensity) and diffusion of Hallyu user groups (Table 1). Usage diversity is “the degree of diversity to which respondents consume Korean popular culture ” and is measured by summing the number of responses indicating that the respondent has used one of 10 types of Hallyu contents over the past year (measured from 1 to 10). Contents scoring 6 or more is classified as having high usage diversity. Meanwhile, usage intensity is “the degree of intensity to which respondents consume a specific type of Korean popular culture” and is measured by surveying users about their proportion of consumption of 10 types of Korean contents and determining the largest value for each individual (measured from 0 to 100). Contents scoring 50 or more is classified as having high usage intensity.
Based on their usage diversity and usage intensity of Hallyu contents, Hallyu users can be classified as avid, intensive, experimental, or low users. The proportion of avid users tended to be higher in countries where Hallyu was more popularized. A high proportion of intensive users indicated a high likelihood of popularization in the future. Meanwhile, proportions of experimental or low users tended to be higher in countries where Hallyu was not yet popularized. The 18 countries surveyed in 2021 recorded an average usage diversity of 5.4 and usage intensity of 41.9.

*For more information on the spread of Hallyu and distribution of Hallyu users, see *A Study on the Economic Ripple Effects of Hallyu in 2021*.

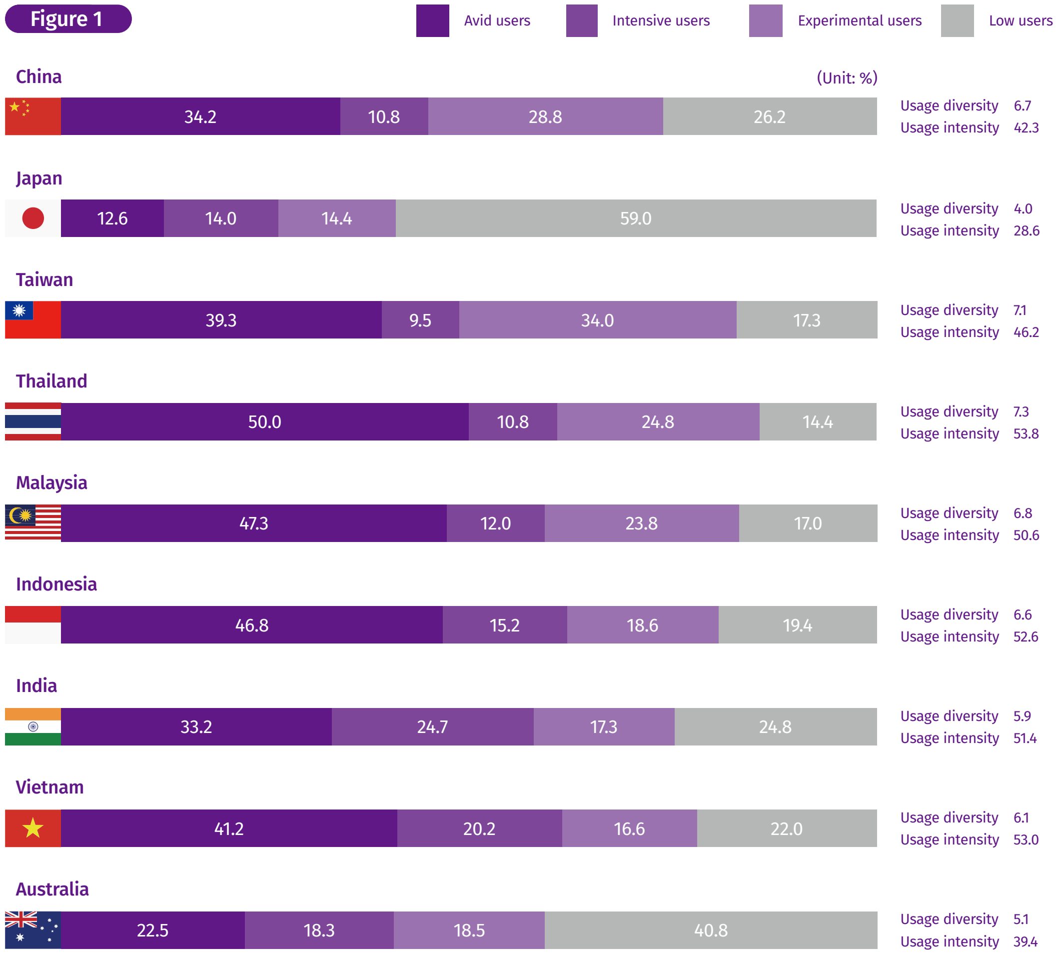
Table 1

	Usage 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 (7.3) and usage intensity (53.8), and the seven countries other than Japan and Australia scored above the average values of usage diversity (5.4) and usage intensity (41.9). Thailand, Malaysia, Indonesia, and Vietnam met the “high” threshold for both usage diversity (at least 6) and usage intensity (at least 50). Following the previous year, Japan was the country with the lowest usage diversity and intensity in the region. Both usage diversity (4.0) and usage intensity (28.6) were considerably low but increased by 0.5 and 9.7 compared with the previous year, respectively (Figure 1).

Figure 1



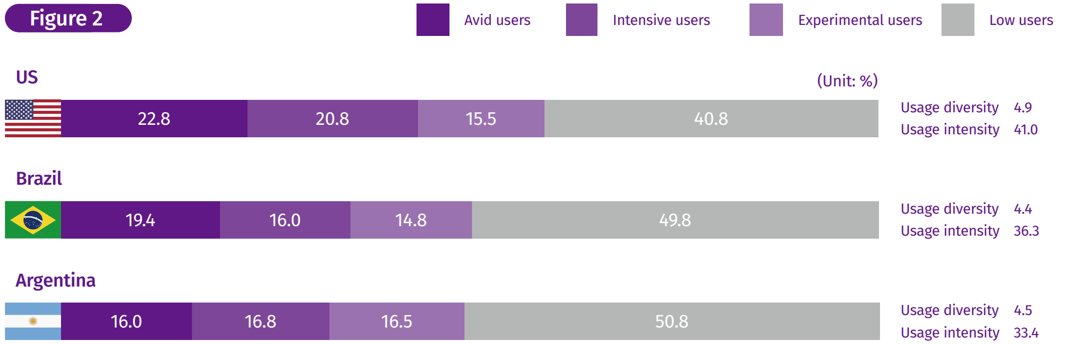
Regarding the distribution of Hallyu users by country, the proportion of avid users in Thailand, Malaysia, Indonesia, and Vietnam exceeded 40%, demonstrating the comparatively active spread of Hallyu. In Japan, the proportion of avid users was 12.6%, the lowest in the region but had increased by 5.8% compared with the previous year, rising two places in the overall country ranking. This indicates that Hallyu is spreading to some extent.

Meanwhile, countries with relatively many experimental users were Taiwan (34.0%) and China (28.8%). Only these two countries showed similar proportions of intensive and experimental users. Chinese experimental users consumed 8.5 Hallyu contents over the past year, the highest in the region.

Americas

Although the usage diversity and intensity of users were lower than the overall average, all three surveyed countries recorded an increase compared with the previous year. The US showed the largest change in usage diversity and usage intensity, with an increase of 1.6 and 13.9, respectively (Figure 2).

Figure 2

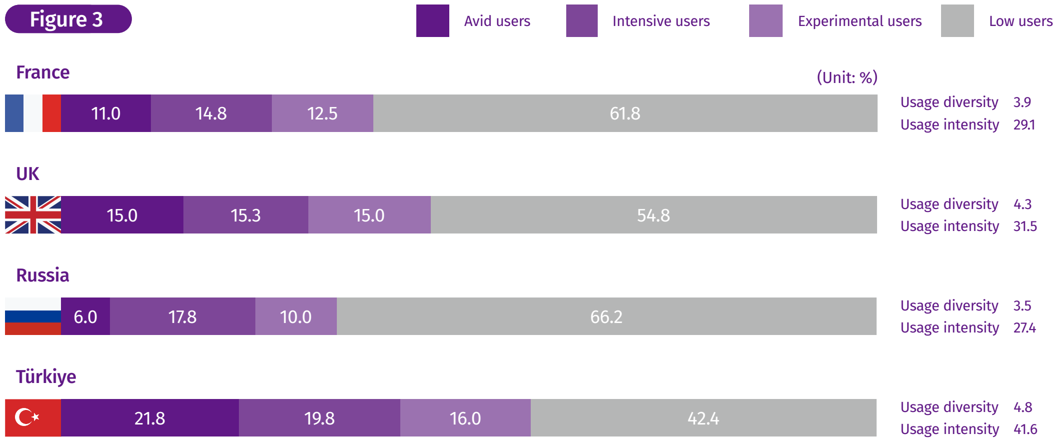


Regarding the distribution of Hallyu users, the proportions of avid and low users in the three countries differed by two to three times, although this gap significantly decreased compared with the previous year. In Argentina, the proportions of avid, intensive, and experimental users were nearly identical.

Europe

Overall, usage diversity and usage intensity were lower than the total average. Russia recorded the lowest values among all 18 surveyed countries for both usage diversity (3.5) and usage intensity (27.4). Conversely, like in the previous year, Türkiye was the only country in the region to score close to the overall average, demonstrating that Hallyu has become more popularized in Türkiye compared with other European countries (Figure 3).

Figure 3

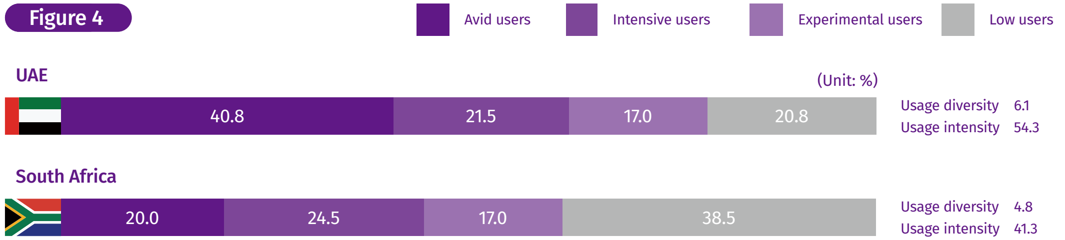


The distribution of Hallyu users also showed that the proportion of avid users was the lowest in France, the UK, and Russia. In all three countries, low users outnumbered avid users by two to ten times. In particular, Russia showed the lowest proportion of avid users alongside the highest proportion of low users, indicating that Hallyu has not been successfully popularized in the country.

Middle East and Africa

Usage diversity and usage intensity did not significantly deviate from the overall average. The UAE showed above-average values for usage diversity (6.1) and usage intensity (54.3). Conversely, South Africa showed values slightly lower than average for usage diversity (4.8) and usage intensity (41.3) (Figure 4).

Figure 4



Regarding the distribution of Hallyu users, the UAE showed a high proportion of avid users, whereas South Africa showed similar proportions of avid, intensive, and experimental users.

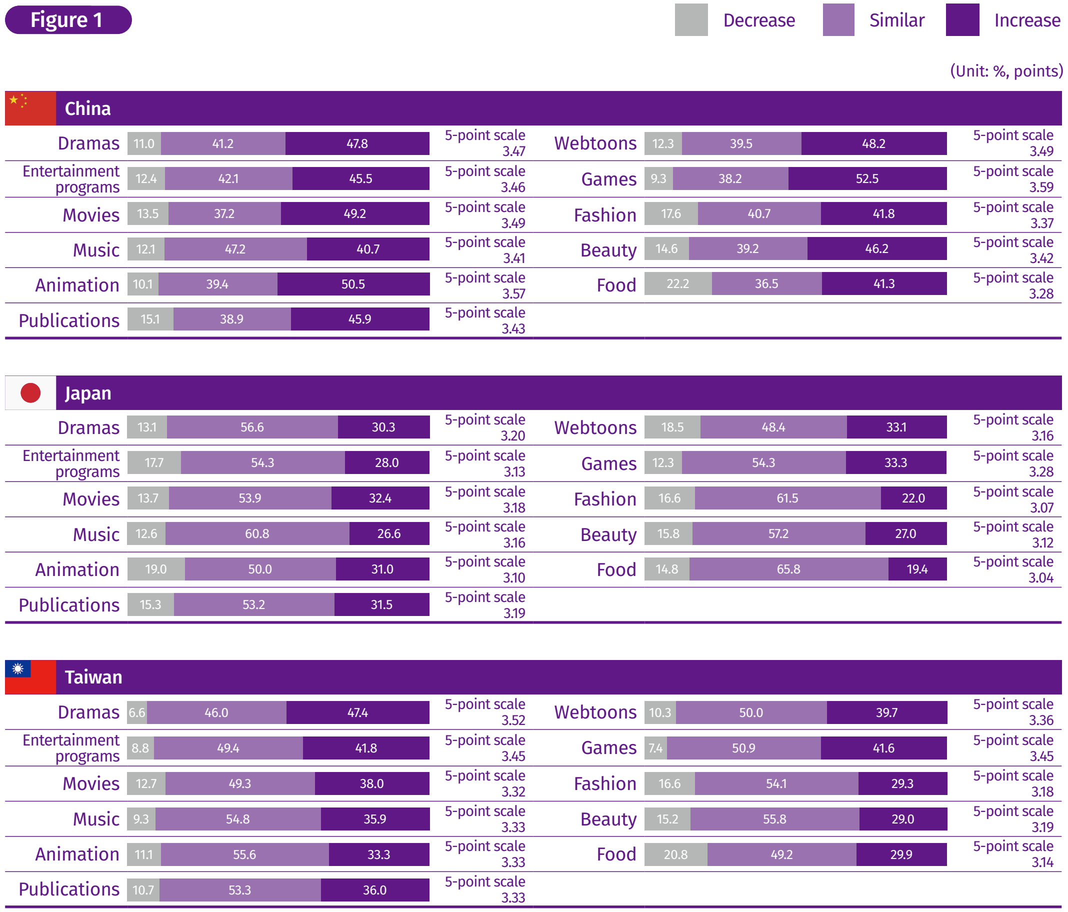
Changes in consumption of Hallyu contents compared with before the COVID-19 outbreak

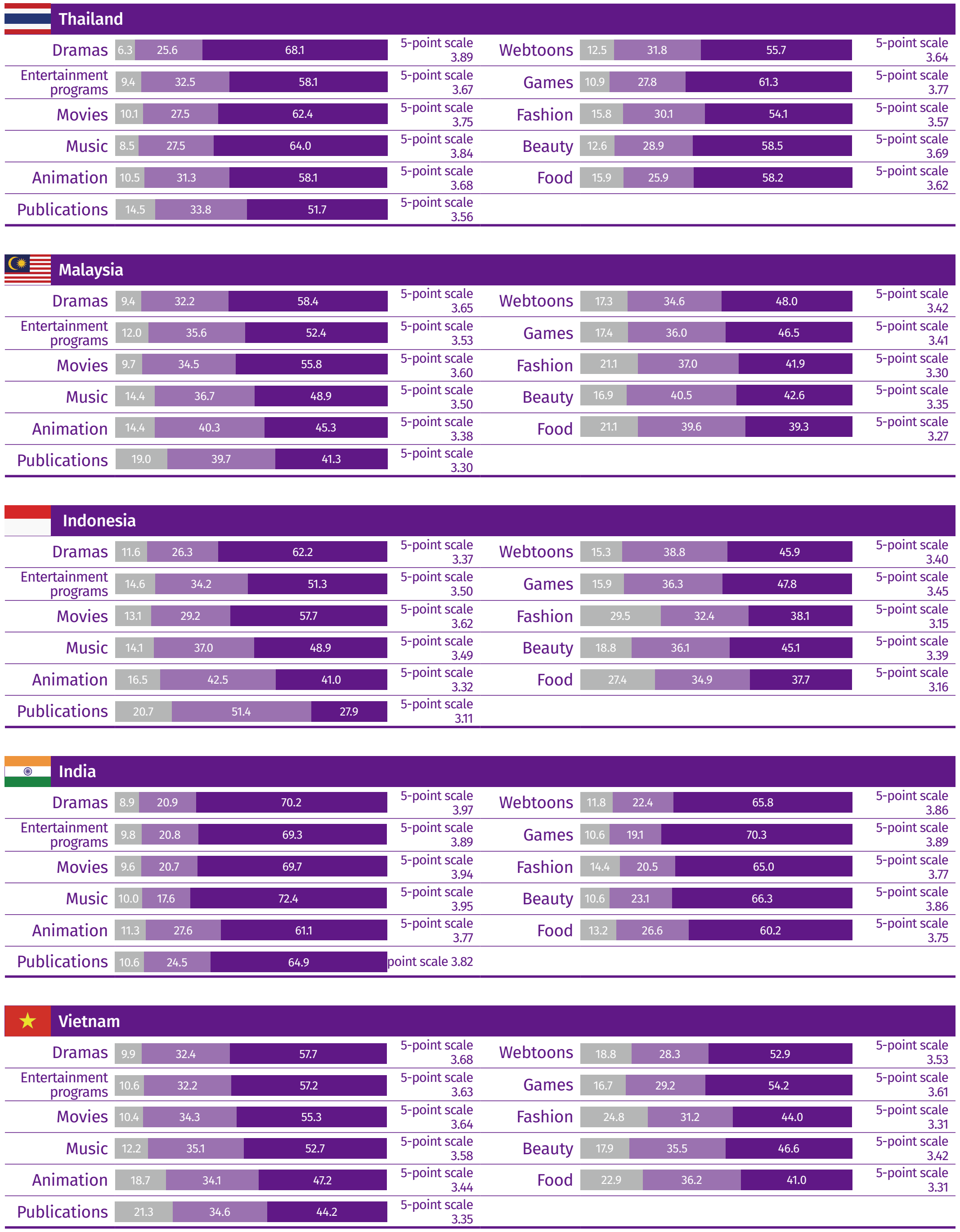
Asia and Oceania

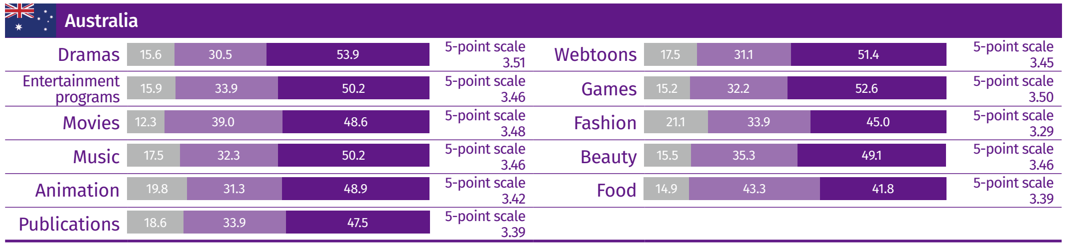
Similar to the previous year, many respondents indicated that their consumption of webtoons and video contents, such as dramas, movies, entertainment shows, and games, increased compared to before the COVID-19 outbreak. Conversely, consumption declined for contents that required face-to-face consumption, such as food, fashion, and beauty (Figure 1).

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

Figure 1



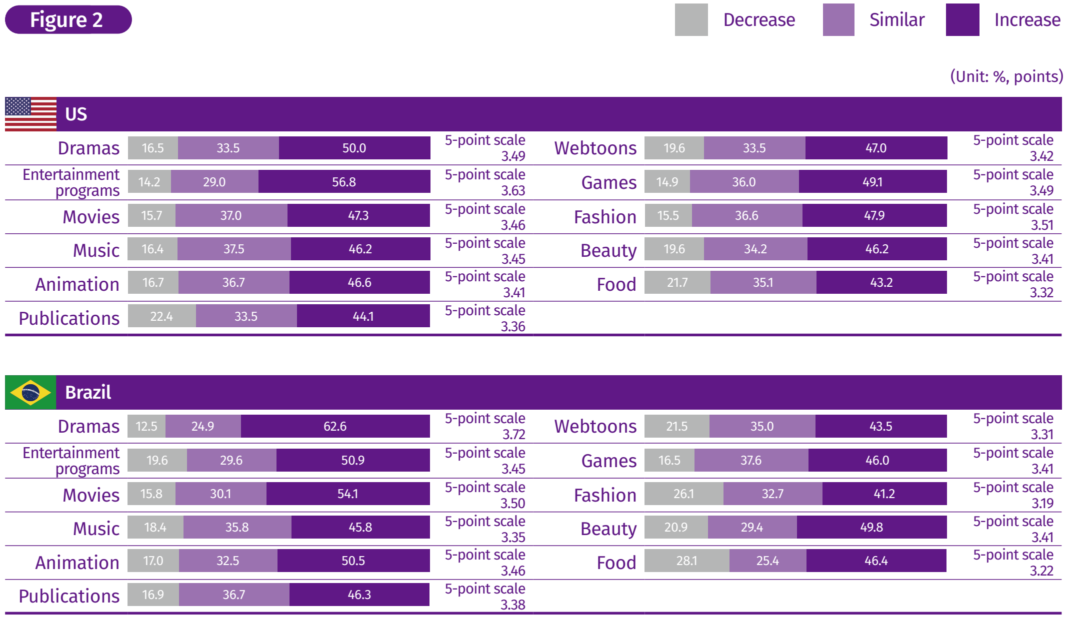


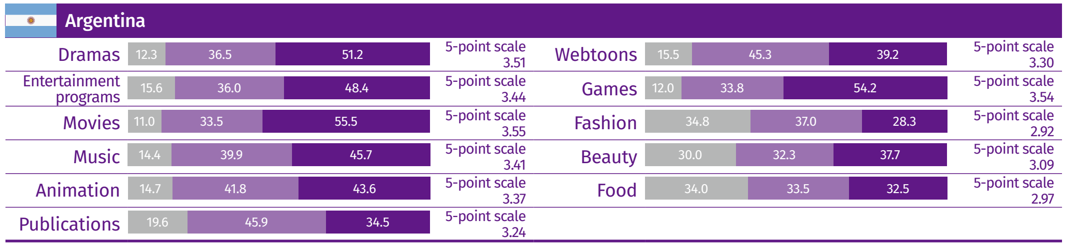


Americas

More respondents reported that their consumption of contactless contents increased compared with that of non-face-to-face contents. The US and Brazil showed figures similar to the overall average for most categories, whereas many categories in Argentina recorded below-average results. In particular, the figures for face-to-face contents, such as fashion, beauty, and food, were low (Figure 2).

Figure 2

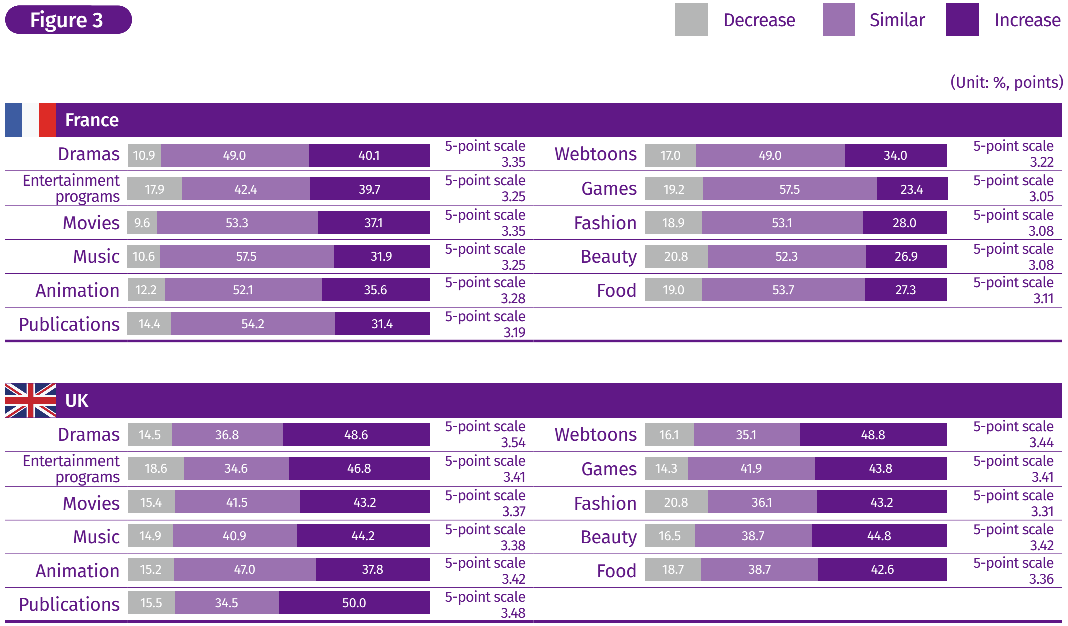


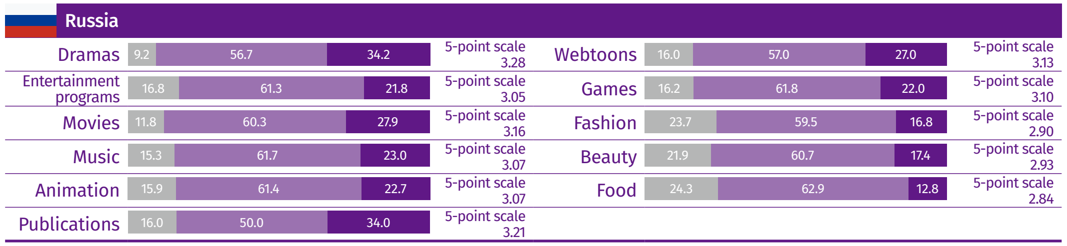


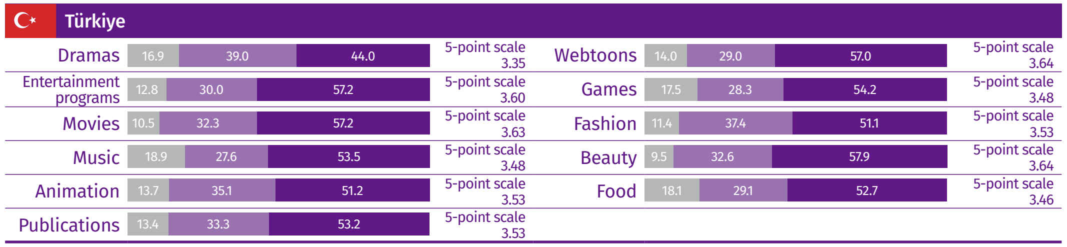
Europe

As in the previous year, Europe showed little change in consumption of face-to-face and non-face-to-face contents. The gap between the highest-scoring movies (3.42) and lowest-scoring food (3.15) was relatively small compared with the other regions. Russia recorded the lowest figures for most contents in Europe and among all countries, whereas Türkiye showed the most Hallyu consumption for all categories, except dramas, in Europe (Figure 3).

Figure 3







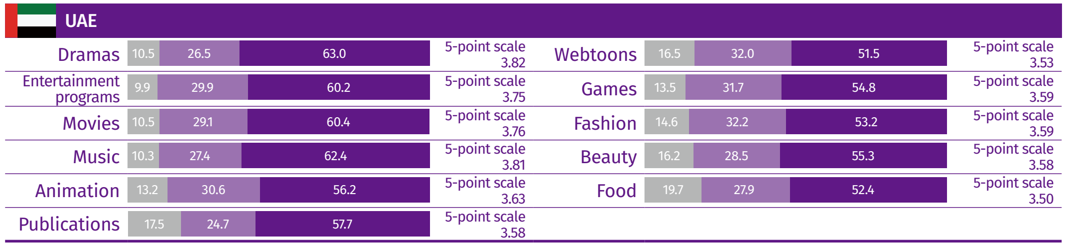
Middle East and Africa

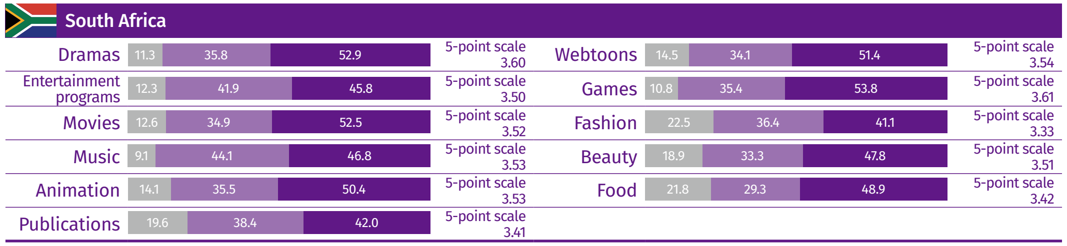
Unlike the previous year, the difference in change in consumption between face-to-face and non-face-to-face contents was small. The UAE's results were above average for most contents, and South Africa showed figures similar to the average. In both countries, drama consumption increased the most, which may reflect the impact of the *Squid Game* sensation (Figure 4).

Figure 4

▨ Decrease ▨ Similar ■ Increase

(Unit: %, points)





Popularity of Hallyu

Asia and Oceania

Based on the measurements of Hallyu contents' popularity in the region, the average response rate for "mass popularity" for all contents was 45.2%, the second-highest result among the five regions after the Middle East (Figure 1). Over half of the respondents perceived that Korean music, fashion, beauty, and food were gaining mass popularity in their home countries.

However, regarding the favorability of the 10 different types of contents by those who have experienced Hallyu contents, the favorability of Korean movies was the highest at 83.7%, followed by dramas and entertainment programs (Figure 2). The mass popularity of entertainment programs was relatively low compared with the contents' favorability, whereas music showed low favorability but considerable mass popularity.

Figure 1 Popularity in home country in Asia and Oceania

(Unit: %)

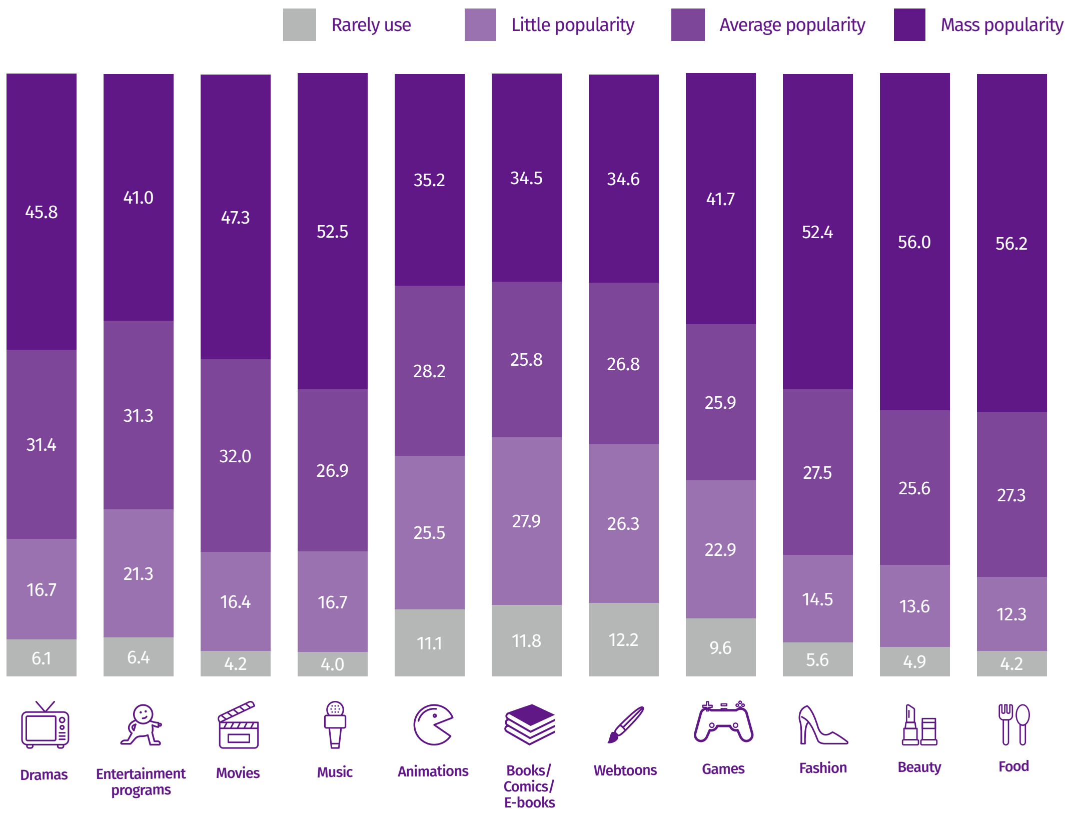
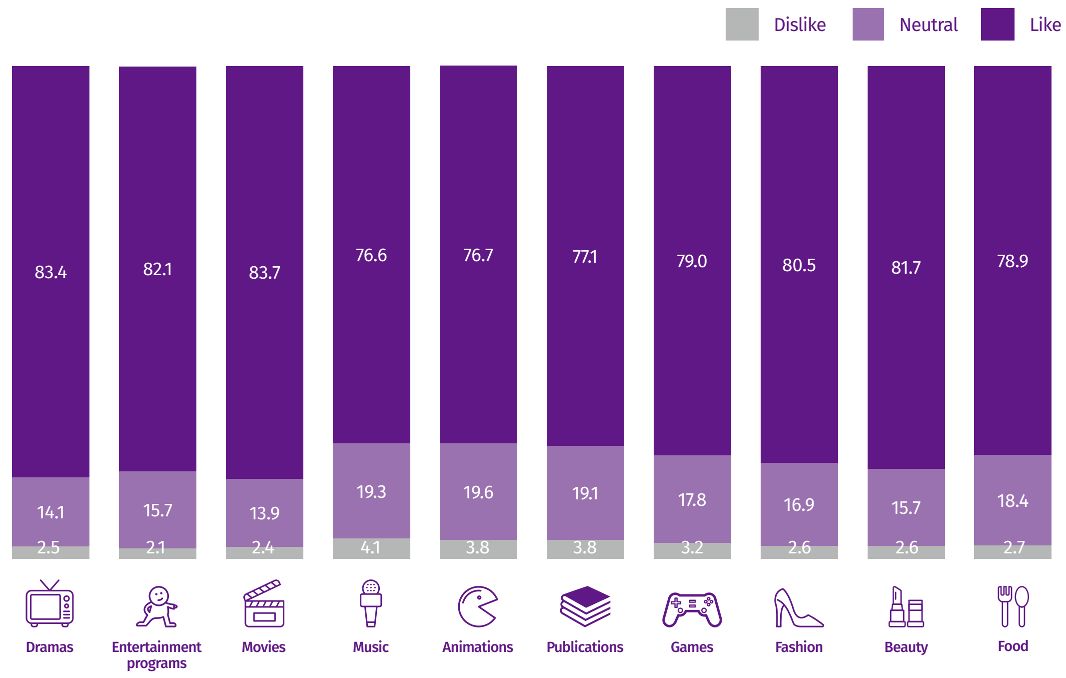


Figure 2 User favorability in Asia and Oceania

(Unit: %)



Americas

Music (45.9%) showed the highest mass popularity among the Hallyu contents. Food (43.8%) and beauty (40.9%) also recorded response rates over 40% and were perceived as popular Korean contents in the region (Figure 3).

Food recorded the highest favorability at 80.5%, followed by movies and dramas, which both exceeded 80% (Figure 4). The popularity of dramas was rather low at around 30%, although favorability exceeded 80%. Conversely, as in the previous year, music ranked first in mass popularity but last in favorability among the contents categories, indicating an enormous gap between popularity and favorability.

Figure 3 Popularity in home country in the Americas

(Unit: %)

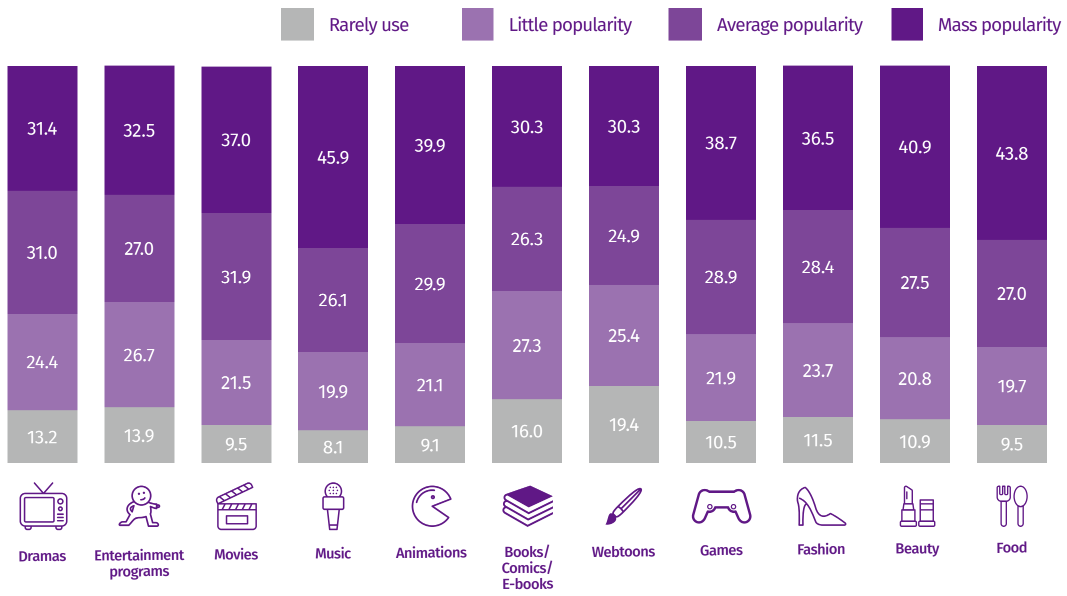
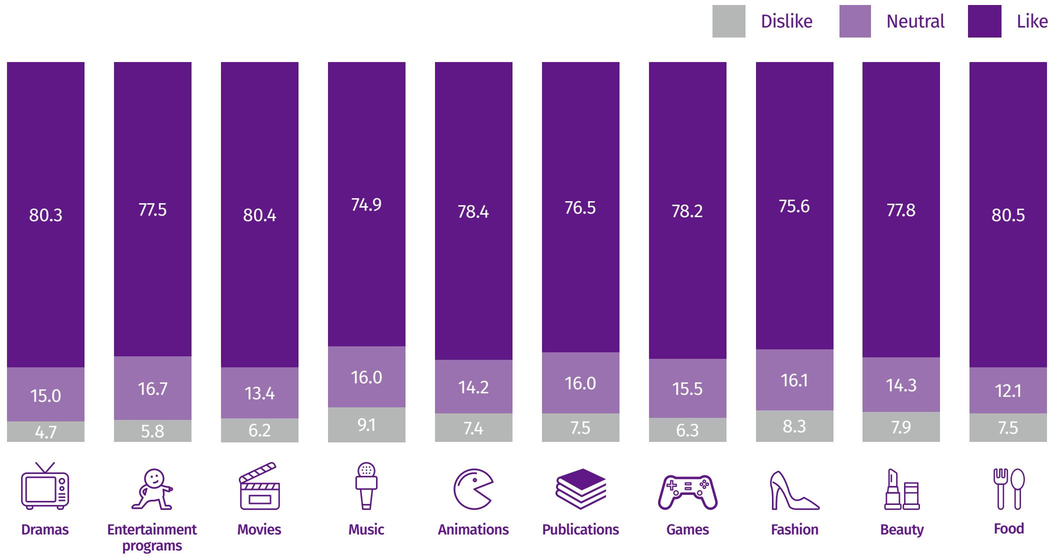


Figure 4 User favorability in the Americas

(Unit: %)



Europe

The mass popularity of Hallyu contents was the lowest, relative to the other regions, for the second consecutive year at 30.54%. Food and beauty were the most popular, with a response rate of 38.8% each, followed by music, fashion, and games, with response rates over 30% (Figure 5).

Meanwhile, the average favorability in Europe was also the lowest among all regions, mirroring the results from last year. Entertainment programs, dramas, food, and movies recorded favorability from 70% to 80%, whereas the other contents categories recorded results from 60% to 70%. As in the other regions, music showed high mass popularity and low favorability (Figure 6).

Figure 5 **Popularity in home country in Europe** (Unit: %)

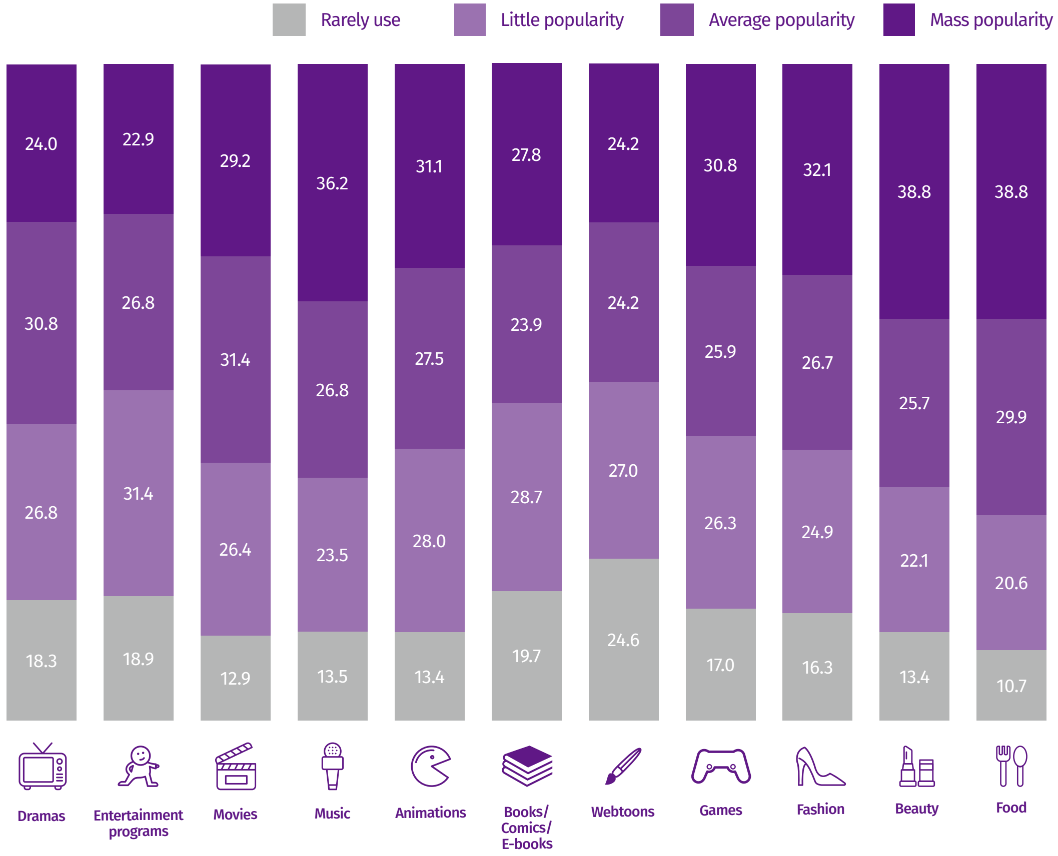
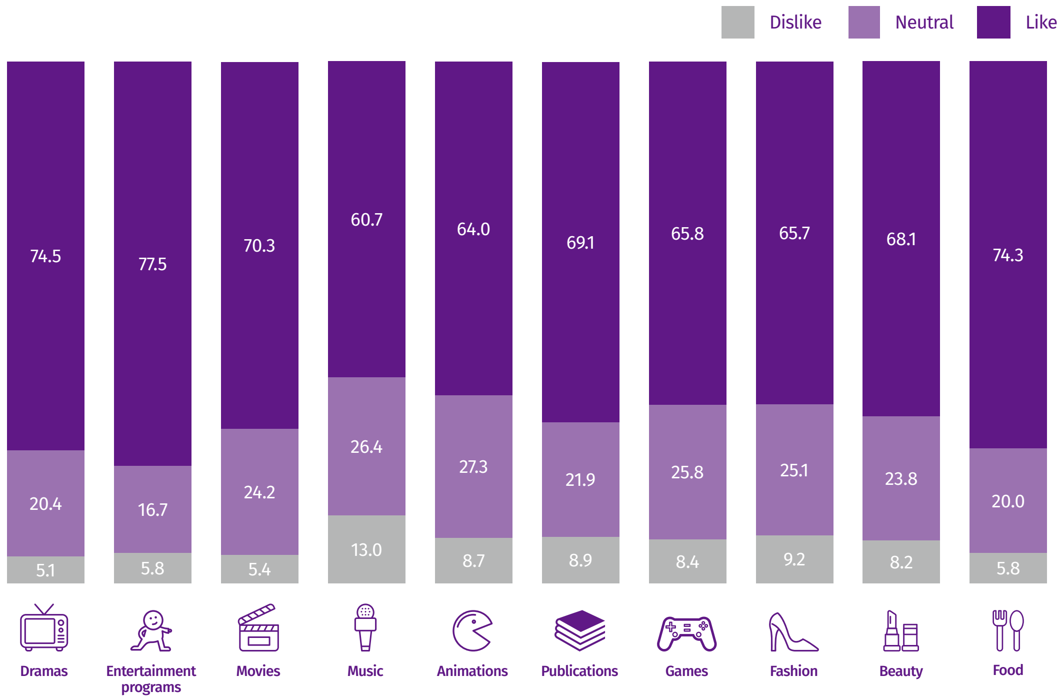


Figure 6 **User favorability in Europe** (Unit: %)



Middle East

The average mass popularity of Hallyu contents in the Middle East was 48.24%, the highest popularity of Hallyu contents among all regions. For the third consecutive year, Korean beauty recorded the highest popularity at 56.0%, followed by fashion and food (Figure 7).

Entertainment programs ranked first for favorability at 87.1%, and dramas, fashion, games, food, and music also showed high favorability exceeding 80%. Conversely, beauty and movies showed relatively low favorability compared with their high popularity, raising concerns about a drop in their reuse rate (Figure 8).

Figure 7 **Popularity in home country in the Middle East** (Unit: %)

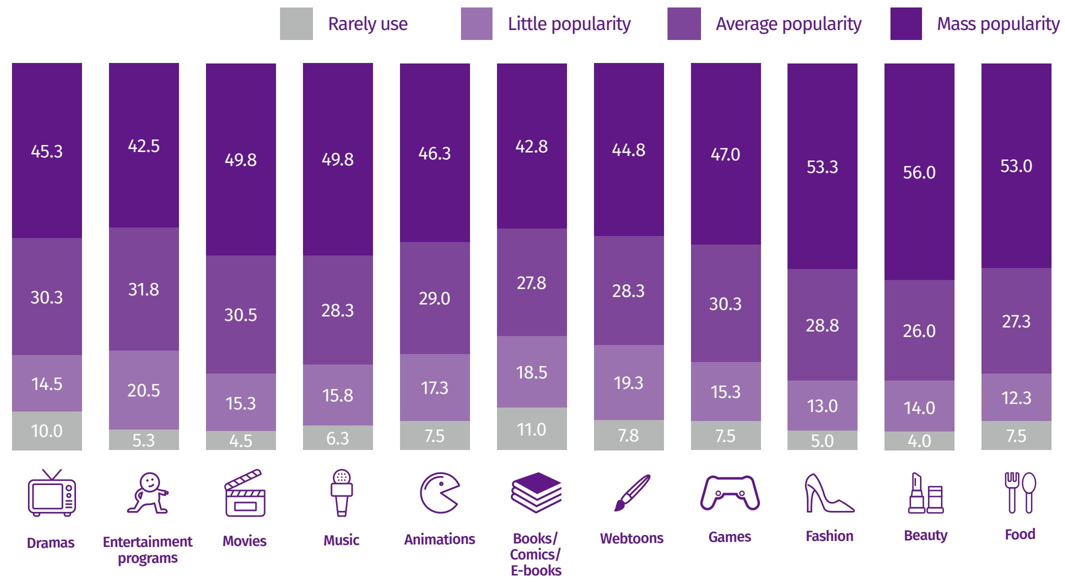
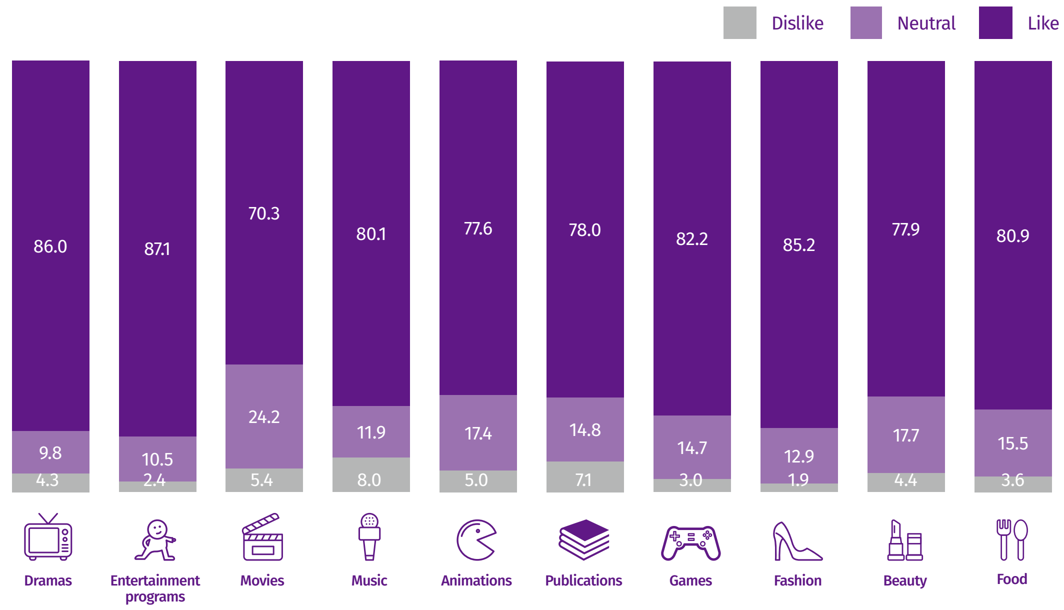


Figure 8 **User favorability in the Middle East** (Unit: %)



Africa

Following Europe, Africa ranked second to last in terms of Hallyu popularity. Only approximately 35% of respondents answered that Hallyu contents had mass popularity. However, this is a 10% increase compared with the previous year, indicating that Hallyu is spreading in the region (Figure 9). Movies were the most popular Hallyu contents, followed by beauty and games, with response rates exceeding 40%, showing their relatively high popularity in Africa. These categories were relatively popular, whereas dramas, entertainment programs, and webtoons showed low mass popularity, in the range of 20–30%.

Dramas recorded a favorability of 88.3%, the highest figure and a substantial difference with the popularity result (Figure 10). Opportunities for contact with dramas must be expanded to increase their popularity by leveraging their high favorability.

Figure 9 **Popularity in home country in Africa** (Unit: %)

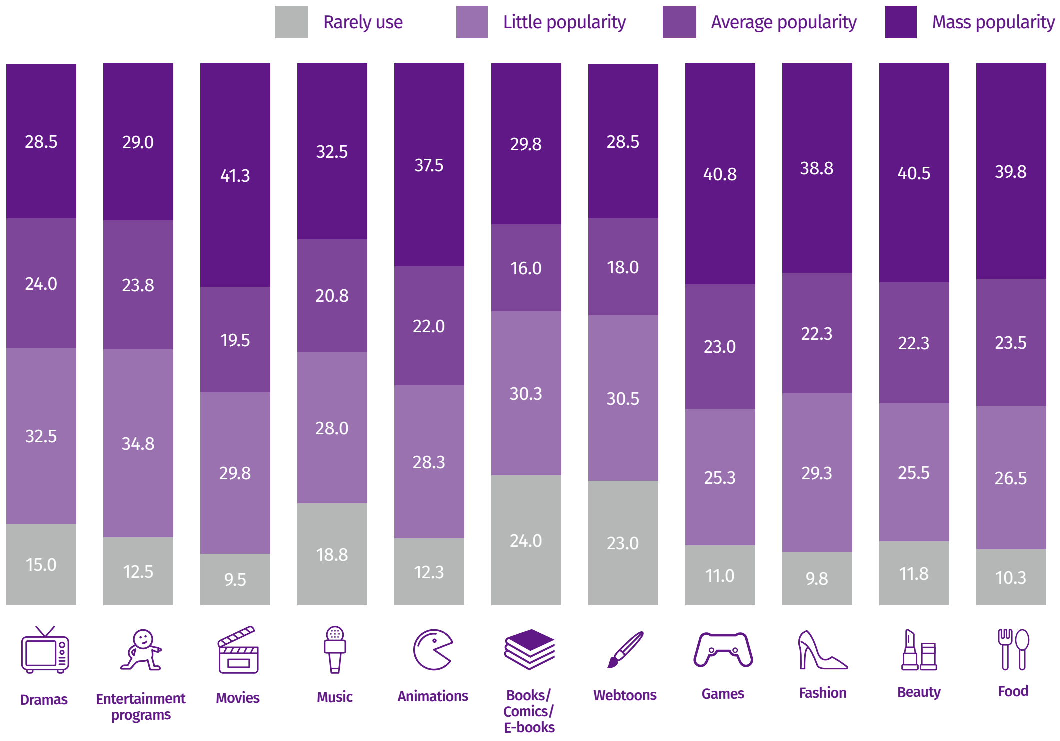
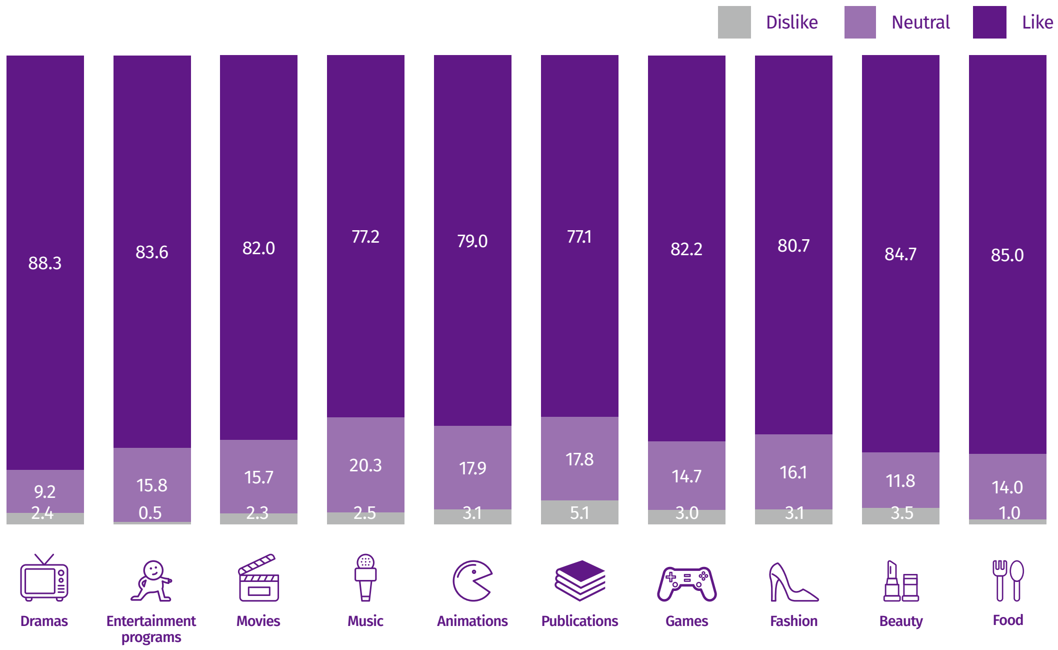


Figure 10 **User favorability in Africa**

(Unit: %)



Favorability and inhibiting favorabilty Factors of Hallyu Contents

Asia and Oceania

The Favorability and inhibiting favorabilty factors of Hallyu contents were generally similar to those in the previous year (Figure 1). Regarding dramas and movies, respondents cited the actors' appealing appearance and well-structured storylines as factors increasing favorability, and language-related reasons, such as inconvenience of dealing with subtitles or dubs and the difficulty and unfamiliarity of Korean, as factors hindering favorability. The material, storylines, and genre were clichéd and uniform—one of the major factors hindering the favorability of dramas. For movies, many responded that the contents was difficult to understand owing to differences in language and culture.

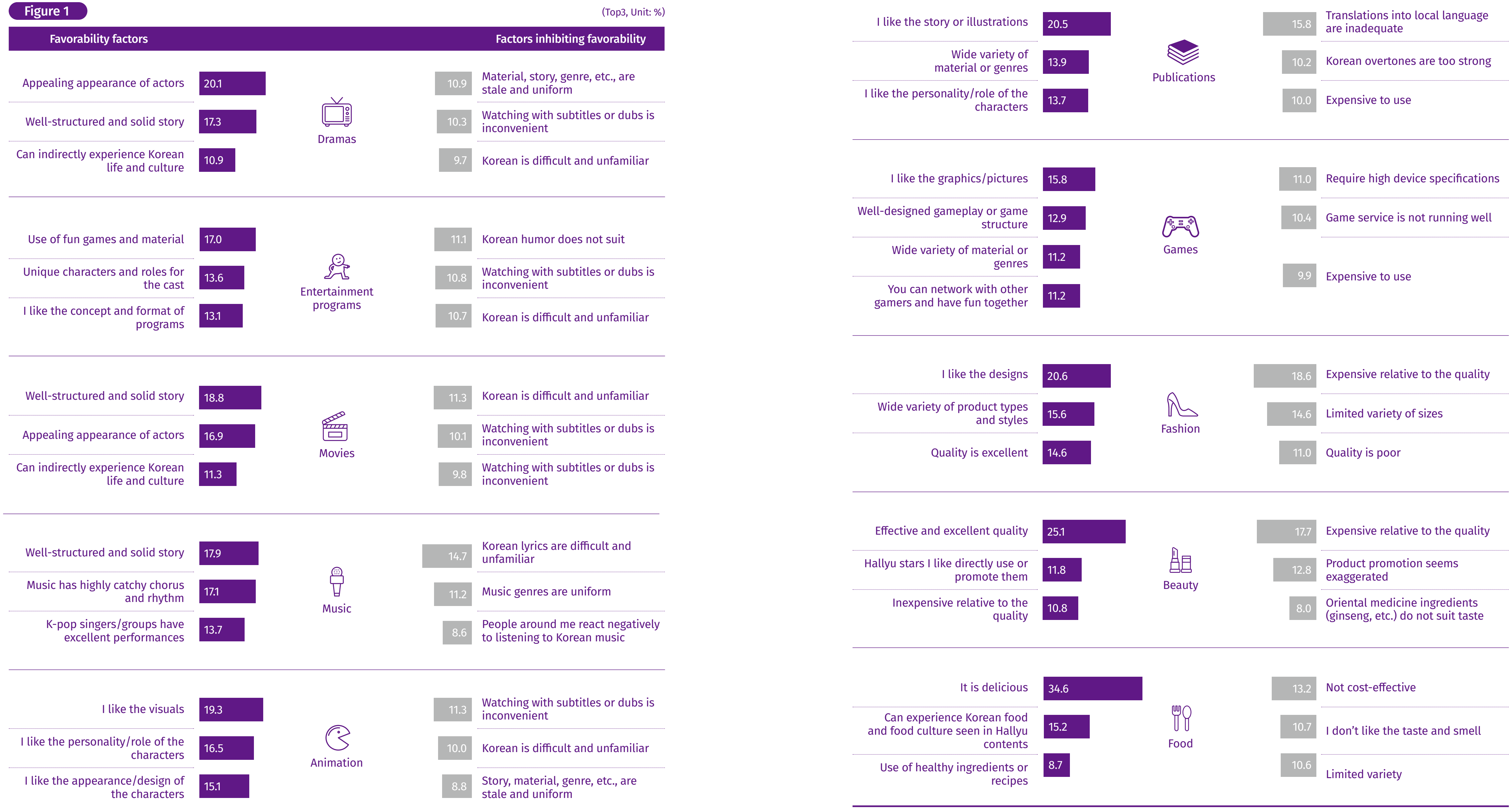
The main favorability factors of entertainment programs were related to contents and quality, including the use of fun games and topics, unique characters and roles of the cast, and favorable program concepts and formats. Meanwhile, "Korean humor does not suit" was the most common factor inhibiting favorability, and like dramas and movies, "language and cultural barriers" were found to impede favorability. Regarding music, respondents cited the appealing appearances and styles of K-pop singers, highly catchy chorus and rhythm, and excellent performances as the major factors driving favorability. As for factors inhibiting favorability, respondents cited incomprehensible Korean lyrics, uniform music genres, and negative reactions of people around them.

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

Factors driving the favorability 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 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. For beauty, favorability factors included the products' excellent quality and that the respondents' favorite Hallyu stars directly used or promoted the products, whereas their low cost-effectiveness and exaggerated promotions hindered favorability.

For Korean food, taste was the greatest factor driving favorability for the second consecutive year. The respondents' ability to experience the Korean food and dining culture that they saw in Hallyu contents ranked second, indicating that experiencing Hallyu contents amplified the consumer's interest in Korean food. Meanwhile, low cost-effectiveness, unfavorable taste and smell, and lack of variety were factors inhibiting favorability.

Figure 1


(Top3, Unit: %)
Favorability factors
Factors inhibiting favorability
Dramas
Appealing appearance of actors 20.1
Well-structured and solid story 17.3
Can indirectly experience Korean life and culture 10.9
10.9 Material, story, genre, etc., are stale and uniform
10.3 Watching with subtitles or dubs is inconvenient
9.7 Korean is difficult and unfamiliar
Entertainment programs
Use of fun games and material 17.0
Unique characters and roles for the cast 13.6
I like the concept and format of programs 13.1
11.1 Korean humor does not suit
10.8 Watching with subtitles or dubs is inconvenient
10.7 Korean is difficult and unfamiliar
Movies
Well-structured and solid story 18.8
Appealing appearance of actors 16.9
Can indirectly experience Korean life and culture 11.3
11.3 Korean is difficult and unfamiliar
10.1 Watching with subtitles or dubs is inconvenient
9.8 Watching with subtitles or dubs is inconvenient
Music
Well-structured and solid story 17.9
Music has highly catchy chorus and rhythm 17.1
K-pop singers/groups have excellent performances 13.7
14.7 Korean lyrics are difficult and unfamiliar
11.2 Music genres are uniform
8.6 People around me react negatively to listening to Korean music
Animation
I like the visuals 19.3
I like the personality/role of the characters 16.5
I like the appearance/design of the characters 15.1
11.3 Watching with subtitles or dubs is inconvenient
10.0 Korean is difficult and unfamiliar
8.8 Story, material, genre, etc., are stale and uniform
Publications
I like the story or illustrations 20.5
Wide variety of material or genres 13.9
I like the personality/role of the characters 13.7
15.8 Translations into local language are inadequate
10.2 Korean overtones are too strong
10.0 Expensive to use
Games
I like the graphics/pictures 15.8
Well-designed gameplay or game structure 12.9
Wide variety of material or genres 11.2
You can network with other gamers and have fun together 11.2
11.0 Require high device specifications
10.4 Game service is not running well
9.9 Expensive to use
Fashion
I like the designs 20.6
Wide variety of product types and styles 15.6
Quality is excellent 14.6
18.6 Expensive relative to the quality
14.6 Limited variety of sizes
11.0 Quality is poor
Beauty
Effective and excellent quality 25.1
Hallyu stars I like directly use or promote them 11.8
Inexpensive relative to the quality 10.8
17.7 Expensive relative to the quality
12.8 Product promotion seems exaggerated
8.0 Oriental medicine ingredients (ginseng, etc.) do not suit taste
Food
It is delicious 34.6
Can experience Korean food and food culture seen in Hallyu contents 15.2
Use of healthy ingredients or recipes 8.7
13.2 Not cost-effective
10.7 I don't like the taste and smell
10.6 Limited variety

Americas

Like the previous year, the ability to experience Korean culture indirectly was the most common favorability factor for dramas, movies, and entertainment programs, unlike in Asia and Oceania. The second-highest favorability factor for entertainment programs and third-highest for movies was the incorporation of the uniqueness of Korean culture, suggesting that respondents in the Americas consumed Hallyu contents because of their attraction to Korea's culture. These results considerably differed from those in Asia, where Korean culture was much more accessible.

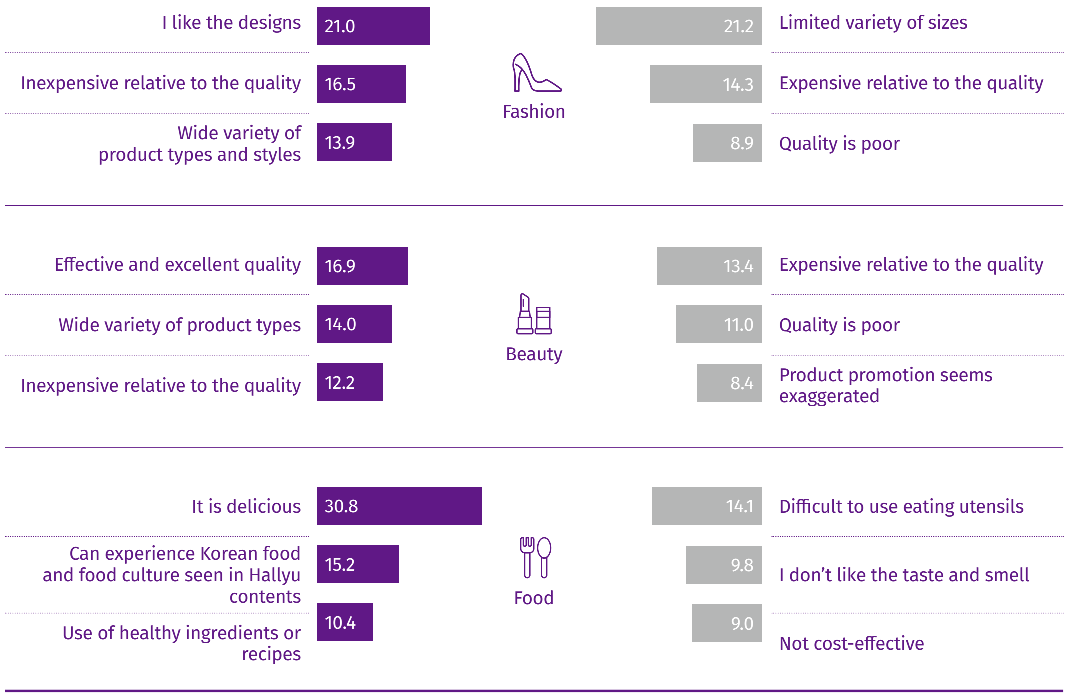
Meanwhile, language-related factors were the primary impediments to the favorability of videos, music, and publications. Such reasons included the perception of Korean as difficult and unfamiliar and the inconvenience of dealing with subtitles or dubs, which were the top factors that hindered favorability. As in the previous year, the top favorability factor for music was "catchy chorus and rhythm," followed by "can see the latest fashion/beauty trends in Korea."

For games, the factors driving or hindering favorability were the same as in Asia and Oceania, and fashion and beauty also showed similar results. However, as in the previous year, the top impediment to favorability for fashion was the lack of diverse sizes, highlighting the importance of considering differences in body type according to ethnicity. The difficulty of using utensils remained the greatest factor hindering favorability for Korean food, revealing the need to encourage restaurants more actively to provide options (e.g., forks) (Figure 2).

Figure 2

(Top3, Unit: %)

Favorability factors				Factors inhibiting favorability
Can indirectly experience Korean life and culture	18.2	Dramas	13.4	Korean is difficult and unfamiliar
Wide variety of material or genres	14.3		12.8	Watching with subtitles or dubs is inconvenient
Well-structured and solid story	13.1		8.2	Small number of episodes overall (usually not multiple seasons)
Can indirectly experience Korean life and culture	16.2	Entertainment programs	14.7	Korean is difficult and unfamiliar
Incorporate the uniqueness of Korean culture	14.6		11.8	Too many broadcast captions (text, speech bubbles, emoticons, etc.)
Use of fun games and material	13.2		9.9	Watching with subtitles or dubs is inconvenient
Can indirectly experience Korean life and culture	18.9	Movies	17.5	Korean is difficult and unfamiliar
Well-structured and solid story	16.2		12.3	Watching with subtitles or dubs is inconvenient
Incorporate a uniqueness not found in local movies	11.2		11.0	Watching with subtitles or dubs is inconvenient
Music has highly catchy chorus and rhythm	24.3	Music	14.7	Korean lyrics are difficult and unfamiliar
Can see the latest fashion/beauty trends in Korea	13.7		11.2	Music genres are uniform
K-pop singers/groups have excellent performances	12.7		8.6	People around me react negatively to listening to Korean music
I like the personality/role of the characters	22.2	Animation	11.6	Watching with subtitles or dubs is inconvenient
I like the visuals	19.9		10.4	Korean is difficult and unfamiliar
I like the appearance/design of the characters	18.8		9.9	Overly commercial
like the story or illustrations	21.8	Publications	16.2	Translations into local language are inadequate
I like the personality/role of the characters	13.9		11.3	Watching with subtitles or dubs is inconvenient
Incorporate the uniqueness of Korean culture	13.5		9.2	Expensive to use
Well-designed gameplay or game structure	19.2	Games	11.7	Expensive to use
I like the graphics/pictures	13.8		11.0	Require high device specifications
Incorporate the uniqueness of Korean culture	13.6		8.3	Game service is not running well



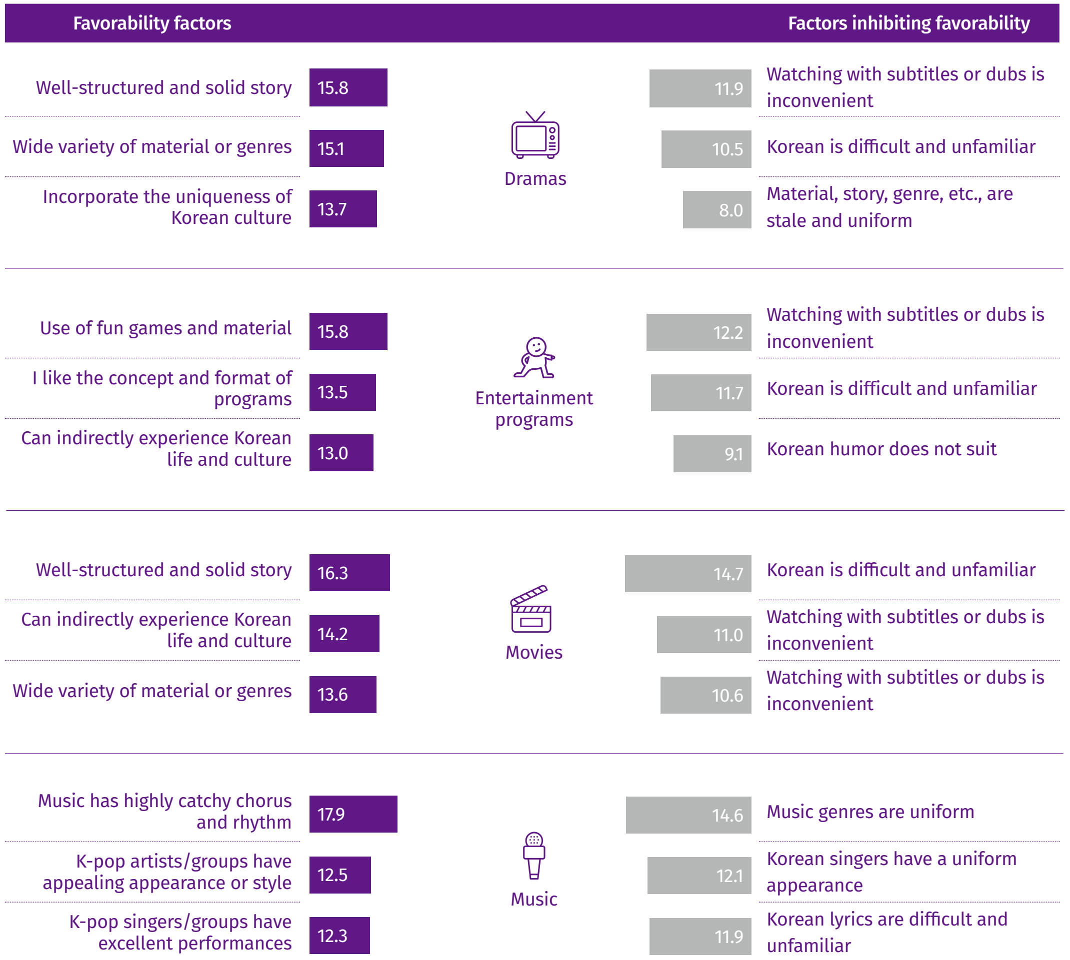
Europe

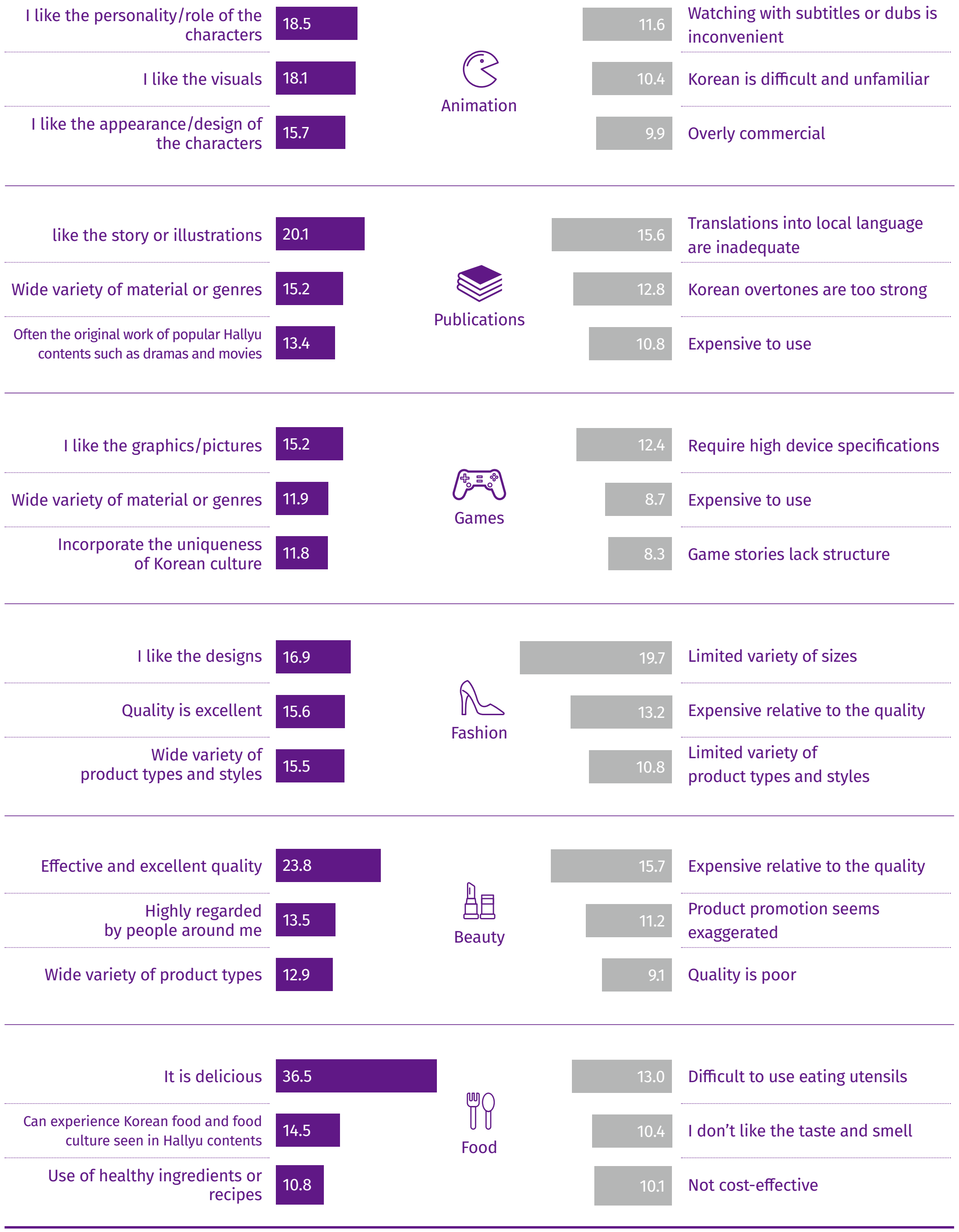
As in the Americas, curiosity toward Korean culture was a major favorability factor for most types of Hallyu contents in Europe (Figure 3). Regarding the favorability factors for videos, music, and publications, the uniqueness of Korean culture and the ability to experience Korean life and culture indirectly were among the top factors. For entertainment programs, movies, and animations, satisfaction with the quality of the contents itself was the major favorability factor. Conversely, Korean-related elements had almost no influence on favorability for games, as was observed in other regions. Instead, the favorability factors for games included their high-quality graphics and images, variety of material and genres, and ability to form a network with other gamers.

For categories where language-related elements were critical (video, music, and publications), the difficulty of Korean and the inconvenience of dealing with translations, subtitles, and dubs were major factors hindering favorability. For dramas and music, the uniformity of contents was a major impediment to favorability. 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 the substantial impact of differences in food culture (i.e., the use of chopsticks).

Figure 3

(Top3, Unit: %)



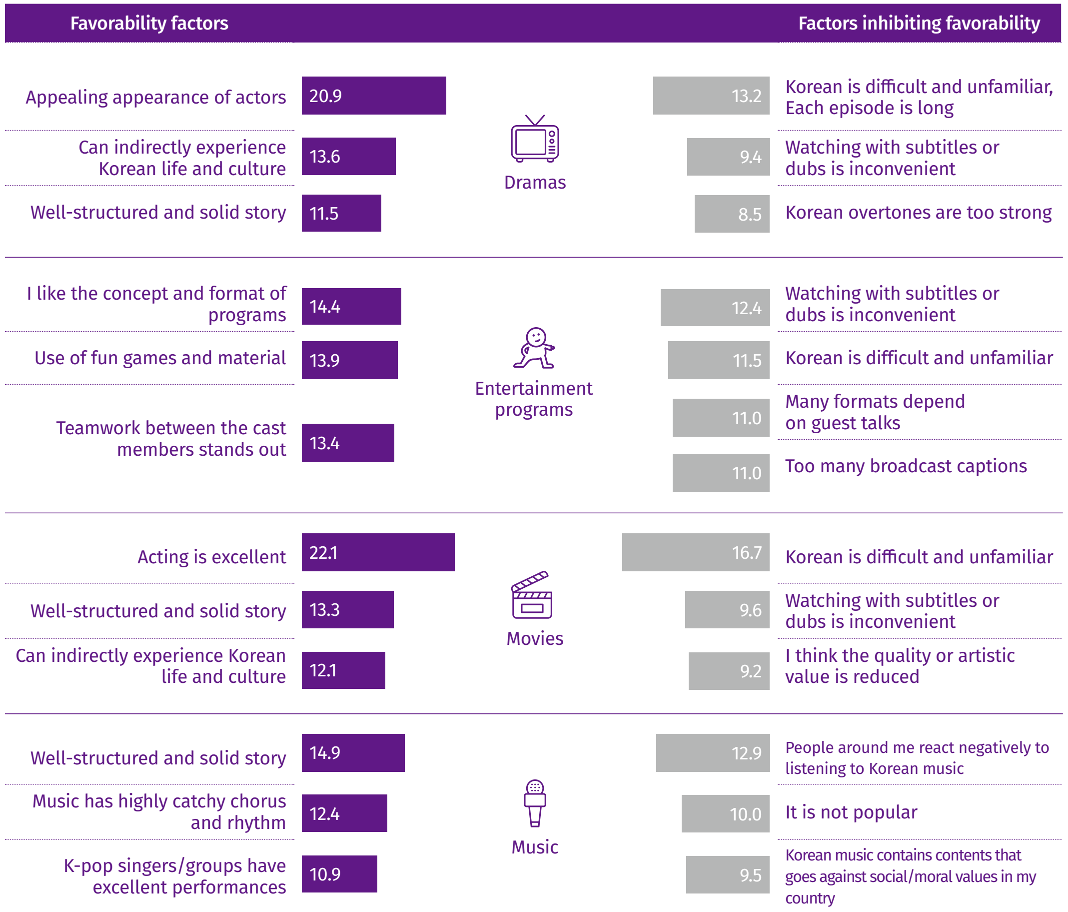


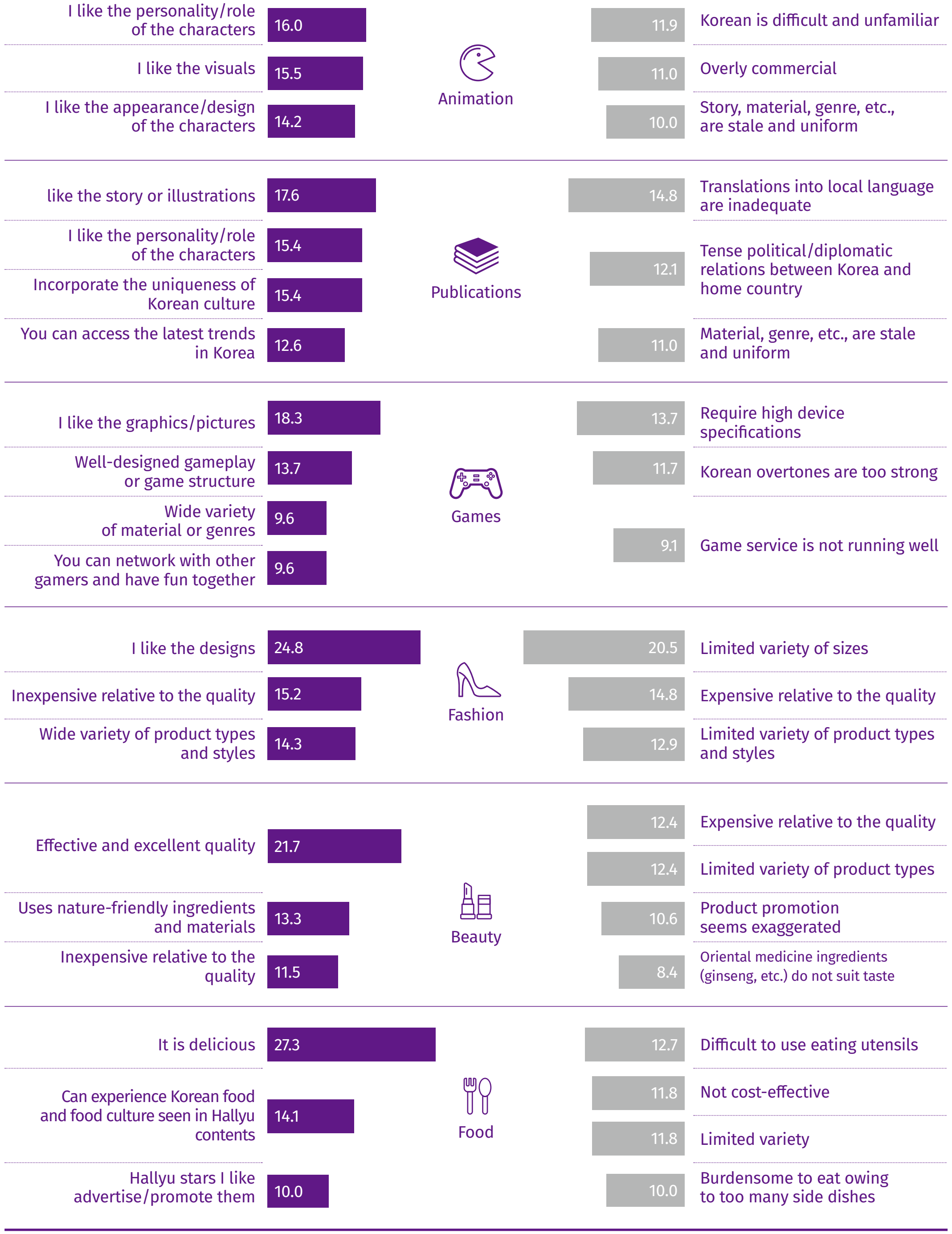
Middle East

The Middle East showed results mixing those of Asia and Oceania, the Americas, and Europe, suggesting the influence of geographic factors (Figure 4). The major favorability factors for Korean videos and music were related to the qualities of the contents itself and the ability to experience Korean culture indirectly. As in other regions, most factors inhibiting favorability for videos, music, and publications were related to language. Games, fashion, beauty, and Korean food also showed results similar to those of other regions.

Figure 4

(Top3, Unit: %)



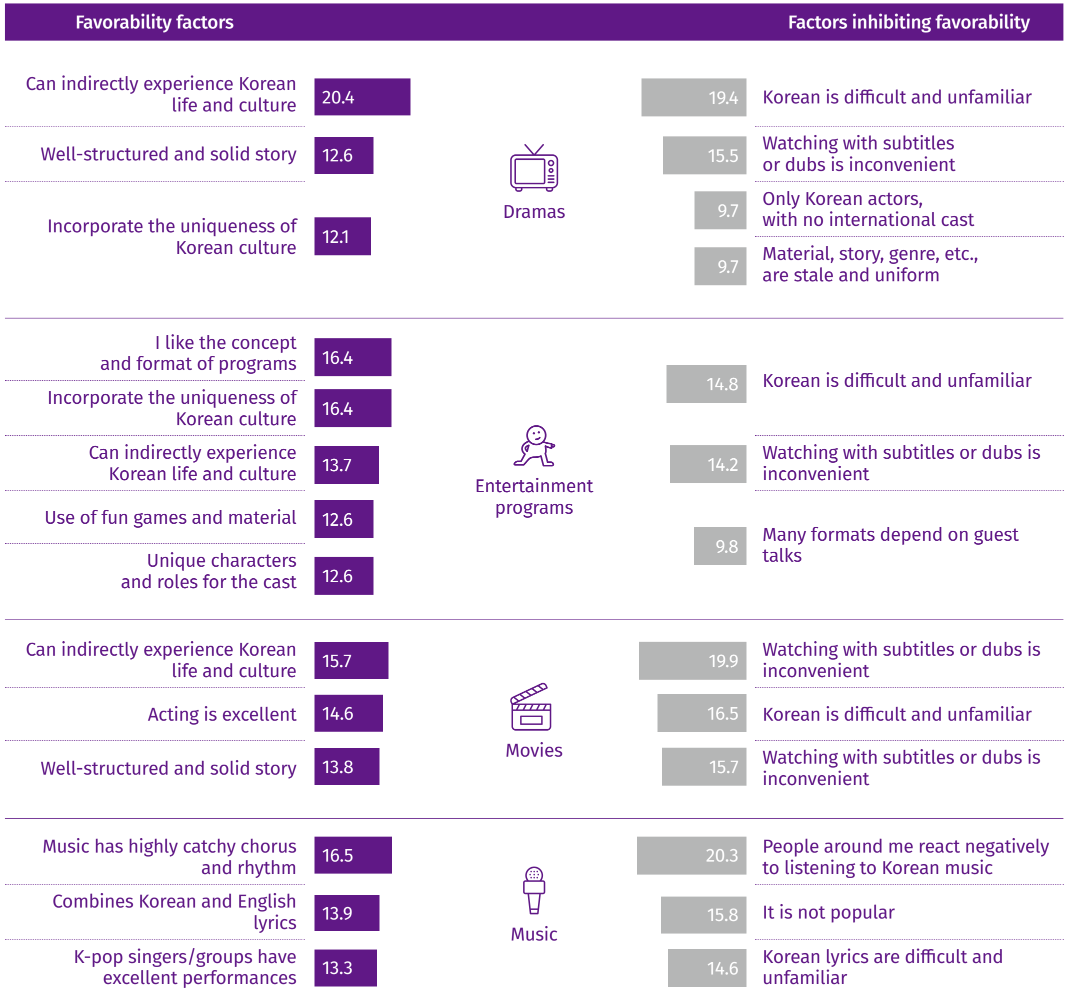


Africa

Africa showed similar results to Europe, as in the previous year. The uniqueness of Korean culture was a key favorability factor for videos, music, and publications, whereas the difficulty to use or understand the contents owing to language or cultural differences was a factor hindering favorability. Games, fashion, beauty, and food showed results similar to those of other regions (Figure 5).

Figure 5

(Top3, Unit: %)



I like the appearance/design of the characters	17.4	Animation	15.6	Korean is difficult and unfamiliar
I like the visuals	17.0		13.8	Watching with subtitles or dubs is inconvenient
Well-structured and solid story	17.0		9.8	Elements do not match my country's culture
I like the personality/role of the characters	14.7			
Wide variety of material or genres	16.9	Publications	17.4	Translations into local language are inadequate
like the story or illustrations	15.3		12.4	Difficult to understand contents owing to different language and culture
I like the personality/role of the characters	14.4		12.4	Korean overtones are too strong
			8.3	Tense political/diplomatic relations between Korea and home country
Well-designed gameplay or game structure	17.4	Games	14.7	Require high device specifications
I like the graphics/pictures	16.8		12.5	Expensive to use
Wide variety of material or genres	10.9		6.5	Game characters lack appeal, and their identity is ambiguous
			6.5	Korean overtones are too strong
I like the designs	26.1	Fashion	26.7	Limited variety of sizes
Wide variety of product types and styles	18.6		12.4	Limited variety of product types and styles
Inexpensive relative to the quality	12.4		9.9	Expensive relative to the quality
Inexpensive relative to the quality	16.0	Beauty	11.8	Product promotion seems exaggerated
Effective and excellent quality	14.6		10.4	Expensive relative to the quality
I like the packaging design	13.9		9.7	Limited variety of product types
Highly regarded by people around me	13.9			
It is delicious	28.5	Food	20.2	Difficult to use eating utensils
Can experience Korean food and food culture seen in Hallyu contents	17.1		11.9	Not cost-effective
Use of healthy ingredients or recipes	14.5		8.3	Burdensome to eat owing to too many side dishes

Favorite Hallyu contents

Five Regions

Figure 1

(Top3, Unit: %)

Asia/Oceania

Dramas		Movies		Games		Animation Characters	
Squid Game	13.8	*Train to Busan*	8.1	*Battleground*	16.6	Larva	14.5
Crash Landing on You	2.9	*Parasite*	7.2	*Ragnarok*	12.0	Pororo	9.9
Penthouse	2.7	*Seobok*	2.0	*Crossfire*	9.3	Super Wings	8.0

Americas

Dramas		Movies		Games		Animation Characters	
Squid Game	24.4	*Parasite*	16.0	*Ragnarok*	15.9	Pucca	19.2
Love Alarm	2.7	*Train to Busan*	5.4	*Crossfire*	12.2	Pororo	8.7
Vincenzo	2.0	*Call*	2.0	*Battleground*	11.6	The Haunted House	7.0

Europe

Dramas		Movies		Games		Animation Characters	
Squid Game	40.2	*Parasite*	16.1	*Battleground*	13.6	The Haunted House	12.1
Stranger	3.2	*Train to Busan*	6.0	*Ragnarok*	9.8	Pororo	10.4
Hotel Del Luna	1.1	*Midnight/ Oldboy*	1.2	*Point Blank*	8.3	Pucca	7.7

Middle East

Dramas		Movies		Games		Animation Characters	
Squid Game	25.5	*Parasite*	5.4	*Battleground*	15.7	The Haunted House	12.3
My Name	3.4	*Train to Busan*	5.0	*Black Desert Online*	13.2	Pucca	9.1
Vincenzo/ Beyond Evil	2.1	*Midnight*	2.9	*Crossfire*	10.7	Pinkfong	7.8

Africa

Dramas		Movies		Games		Animation Characters	
Squid Game	23.3	*Parasite*	4.6	*Gunship Battle*	13.6	Super Wings	11.6
Crash Landing on You/ Kingdom	3.4	*Call*	3.8	*Dungeon Fighter Online*	12.5	The Haunted House	11.2
The World of the Married/ Sweet Home	2.4	*Sweet & Sour*	3.4	*Ragnarok/ Crossfire*	10.9	Pinkfong	8.0

Asia and Oceania

The countries in this region recorded similar preference rankings for all contents except dramas (Figure 2). Old dramas remained popular in China and Japan, whereas most other countries favored relatively new ones. *Squid Game* topped the ranking in the region, excluding Japan, where *Winter Sonata* ranked first, demonstrating the global sensation of *Squid Game*. Taiwan, Malaysia, and Australia recorded an overwhelming preference of over 20%. Following last year, most dramas included in the rankings were provided through global OTTs, such as Netflix.

As for movies, *Parasite* and *Train to Busan* claimed first and second in most countries, respectively, as in the previous year's survey. In Japan, *Shiri*, *My Sassy Girl*, and *A Moment to Remember*, movies from the 1990s and 2000s, were included in the top rankings, indicating a preference for older films. Like dramas, nearly all movies included in the rankings were distributed through global OTTs. Regarding games, *Battlegrounds*, *Ragnarok*, and *Lineage* demonstrated popularity. *Battlegrounds* topped the ranking in five countries, and *Ragnarok* and *Lineage* in two countries, displaying their hold on Korean games.

Regarding animation characters, Larva showed the highest preference, ranking first in Taiwan and four other countries. Super Wings was the most popular in China and India and Pororo in Japan and Thailand.

Figure 2

(Top3, Unit: %)

China

Dramas		Movies		Games		Animation Characters	
Squid Game	7.9	*Train to Busan*	12.2	*Battleground*	27.6	Super Wings	15.9
My Love from the Star	5.1	*Parasite*	6.3	*Crossfire*	22.6	Larva	12.5
Descendants of the Sun	4.9	*Emergency Declaration*	3.8	*Dungeon Fighter Online*	15.5	Pucca/ Robocar Poli	10.8

Japan

Dramas		Movies		Games		Animation Characters	
Winter Sonata	11.9	*Parasite*	23.7	*Lineage*	27.3	Pororo	17.0
Squid Game	8.4	*Train to Busan/ A Moment to Remember*	4.1	*Battleground*	9.4	Tobot	11.0
Crash Landing on You	7.1	*My Sassy Girl/ Shiri/ Miracle in Cell No.7*	1.7	*Black Desert Online/Ragnarok*	3.9	Go Go Dino	8.0

Taiwan

Dramas		Movies		Games		Animation Characters	
Squid Game	22.8	*Train to Busan*	10.4	*Lineage/Kart Rider*	18.2	Larva	15.8
Hometown Cha-Cha-Cha	5.1	*Parasite*	8.8	*Ragnarok*	17.3	Robocar Poli/ Pororo	14.8
Crash Landing on You	3.5	*Seobok*	8.4	*Battleground*	12.6	Pucca/Tobot	8.4

Thailand

Dramas		Movies		Games		Animation Characters	
Squid Game	9.4	*Train to Busan*	7.5	*Ragnarok*	28.9	Pororo	12.5
Dae Jang Geum/ Vincenzo	4.9	*Parasite*	2.8	*Battleground*	11.9	Secret Jouju	9.5
Mr. Queen: The Secret	2.9	*Call*	1.3	*Black Desert Online*	9.9	Treehouse Detectives	8.4

Malaysia

Dramas		Movies		Games		Animation Characters	
Squid Game	22.4	*Train to Busan*	14.8	*Battleground*	23.0	Larva	24.0
Penthouse	5.3	*Parasite*	4.8	*Ragnarok*	11.5	Pinkfong	11.0
Hometown Cha-Cha-Cha	5.0	*Midnight*	3.3	*MapleStory*	10.9	Pororo	10.0

Indonesia

Dramas		Movies		Games		Animation Characters	
Squid Game	10.6	*Parasite*	6.4	*Ragnarok*	21.3	Larva	32.6
Penthouse	5.1	*Train to Busan*	5.8	*Point Blank*	17.5	Tayo	16.9
Hometown Cha-Cha-Cha	4.6	*Sweet & Sour*	2.0	*Battleground*	15.2	Pororo	10.3

India

Dramas		Movies		Games		Animation Characters	
Squid Game	14.3	*Train to Busan*	8.0	*Battleground*	16.5	Super Wings	10.3
Vincenzo	3.7	*Midnight*	7.1	*Crossfire*	11.1	Larva/Pororo	8.2
You Are My Spring	3.2	*Parasite*	4.8	*Gunship Battle*	10.8	Pinkfong	7.3

Vietnam

Dramas		Movies		Games		Animation Characters	
Squid Game	11.1	*Train to Busan*	3.8	*Battleground*	16.1	Larva	13.8
Hometown Cha-Cha-Cha	5.2	*Parasite*	3.4	*Crossfire*	11.2	Super Wings	9.7
Penthouse	4.9	*Seobok*	3.1	*Summoners War*	10.8	Pororo	8.8

Australia

Dramas		Movies		Games		Animation Characters	
Squid Game	25.1	*Parasite*	8.4	*Battleground*	11.1	Larva	8.7
Crash Landing on You	3.3	*Train to Busan*	5.8	*Black Desert Online*	10.5	Pororo	8.2
Reply 1988/ Vincenzo	1.4	*Space Sweepers*	1.8	*Crossfire*	9.9	The Haunted House /Tobot	7.1

Americas

North and South America showed similar contents preferences (Figure 3), unlike the previous year. For dramas, *Squid Game* ranked first in all three surveyed countries, and dramas distributed by global OTTs, such as *Love Alarm* and *Vincenzo*, also ranked high. Regarding movies, as in Asia and Oceania, *Parasite* and *Train to Busan* ranked first and second, respectively, in all three countries in the Americas. However, as in the previous year, *Parasite*'s preference rating in Brazil and Argentina doubled that in the US, showing a huge difference in intensity.

For games, *Battlegrounds* was the most favored in the US, *Crossfire* in Brazil, and *Ragnarok* in Argentina, and all three games ranked high in each country. Pucca and Pororo were popular animation characters. In particular, in South America, Pucca displayed overwhelming popularity with a preference rating above 25%.

Figure 3

(Top3, Unit: %)

US

Dramas		Movies		Games		Animation Characters	
Squid Game	20.3	*Parasite*	7.6	*Battleground*	11.5	Pororo /Go Go Dino	8.7
True Beauty	2.9	*Train to Busan*	3.6	*Ragnarok*	10.7	The Haunted House	8.3
Vincenzo/ Sweet Home	1.8	*Call*	3.0	*Dungeon Fighter Online/ Seven Knights*	9.3	Pinkfong	8.0

Brazil

Dramas		Movies		Games		Animation Characters	
Squid Game	32.8	*Parasite*	17.9	*Crossfire*	19.0	Pucca	28.6
Crash Landing on You/ Descendants of the Sun/ Love Alarm	2.7	*Train to Busan*	5.9	*Ragnarok*	18.0	Super Wings	9.5
Vincenzo	2.0	*Pandora*	2.6	*Battleground*	11.8	Pororo	8.7

Argentina

Dramas		Movies		Games		Animation Characters	
Squid Game	16.9	*Parasite*	23.2	*Ragnarok*	21.1	Pucca	26.3
Love Alarm	5.8	*Train to Busan*	6.7	*Battleground*	11.4	The Haunted House	10.5
Penthouse	2.9	*Forgotten/ Oldboy*	1.9	*Crossfire*	9.7	Pororo	8.8

Europe

Unlike the previous year, the surveyed European countries showed similar preference trends for most contents (Figure 4). Regarding dramas, *Squid Game* took first place, confirming the overwhelming preference for the drama in all countries. *Squid Game* recorded high preference scores of approximately 35% in France, the UK, and Türkiye. In particular, in Russia, more than half of the respondents (53.7%) chose *Squid Game* as their favorite drama. Regarding movies, *Parasite* and *Train to Busan* claimed first and second in all countries, respectively. The 19-year-old film *Oldboy* ranked third in France and Russia, showing that it remained favored in Europe. For games, *Battlegrounds* ranked first in three countries, excluding France; *Ragnarok* was the most popular in France. Regarding animation characters, The Haunted House ranked first in France and Russia, and Pororo, Super Wings, and Pucca were also popular.

Figure 4

(Top3, Unit: %)

France

Dramas		Movies		Games		Animation Characters	
Squid Game	39.0	*Parasite*	16.3	*Ragnarok*	17.0	The Haunted House	11.6
Love Alarm	3.0	*Train to Busan*	4.5	*Crossfire*	9.2	Treehouse Detectives	10.3
My Name	2.4	*Oldboy/ Sweet & Sour/ Minari*	1.5	*Battleground*	7.8	Pororo	9.7

UK

Dramas		Movies		Games		Animation Characters	
Squid Game	36.7	*Parasite*	8.3	*Battleground*	14.1	Pororo	9.8
Sweet Home	2.3	*Train to Busan*	3.6	*Point Blank*	9.8	Super Wings / Kongsuni	8.7
Stranger	1.7	*Call*	2.6	*Black Desert Online*	8.6	Go Go Dino	7.5

Russia

Dramas		Movies		Games		Animation Characters	
Squid Game	53.7	*Parasite*	16.7	*Battleground*	11.3	The Haunted House	19.4
Vincenzo	2.5	*Train to Busan*	10.6	*Black Desert Online/ Crossfire/ Lineage*	10.0	Pororo	17.3
Descendants of the Sun	1.5	*The Handmaiden/ Oldboy*	1.3	*Point Blank*	7.5	Robocar Poli	11.7

Türkiye

Dramas		Movies		Games		Animation Characters	
Squid Game	34.6	*Parasite*	19.9	*Battleground*	19.1	Pucca	13.9
Stranger	6.7	*Train to Busan*	5.1	*Ragnarok*	10.1	Super Wings	12.0
Hotel Del Luna	2.6	*Ayla*	2.3	*Point Blank*	9.0	The Haunted House	10.9

Middle East and Africa

Broadly speaking, the Middle East and Africa showed similar patterns, although many differences could be observed upon closer inspection. Like the other regions, *Squid Game* was the top-ranking drama in both Africa and the Middle East, although different dramas took the second and third places. For movies as well, *Parasite* ranked first in both regions, and the second and third-place movies were different. However, a similarity with the other regions was that all dramas and movies in the rankings were distributed by global OTTs (Figure 5). For games, *Battlegrounds* ranked first in the UAE and *Gunship Battle* in South Africa. Animation characters also differed, with The Haunted House and Super Wings ranking first in the UAE and South Africa, respectively.

Figure 5

(Top3, Unit: %)

UAE

Dramas		Movies		Games		Animation Characters	
Squid Game	25.5	*Parasite*	5.4	*Battleground*	15.7	The Haunted House	12.3
My Name	3.4	*Train to Busan*	5.0	*Black Desert Online*	13.2	Pucca	9.1
Beyond Evil/ Vincenzo	2.1	*Midnight*	2.9	*Crossfire*	10.7	Pororo	9.0

South Africa

Dramas		Movies		Games		Animation Characters	
Squid Game	23.3	*Parasite*	4.6	*Gunship Battle*	13.6	Super Wings	11.6
Crash Landing on You/ Kingdom	3.4	*Call*	3.8	*Dungeon Fighter Online*	12.5	The Haunted House	11.2
The World of the Married/ Sweet Home	2.4	*Sweet & Sour*	3.4	*Crossfire/ Ragnarok*	10.9	Pinkfong	8.0

Favorite Hallyu stars

Five regions

Figure 1

(Top3, Unit: %)

	Singer		Actor	
Asia/Oceania	BTS	22.6	Lee Min-ho	10.6
	BLACKPINK	12.9	Song Joong-ki	3.4
	IU	3.8	Gong Yoo/ Song Hye-kyo	3.2
	Lisa	3.6	Hyun Bin	3.1
	TWICE	3.1	Lee Ji-eun (IU)	2.7
Americas	BTS	35.8	Lee Min-ho	6.8
	BLACKPINK	7.0	Gong Yoo	4.2
	PSY	2.8	Hyun Bin	2.9
	IU	1.7	Jung Ho-yeon	2.7
	EXO	1.4	Lee Jung-jae	1.8
Europe	BTS	28.7	Lee Min-ho	6.8
	BLACKPINK	8.1	Lee Jong-suk/ Hyun Bin	2.3
	PSY	3.8	Jung Ho-yeon	1.8
	IU	1.3	Bae Suzy	1.7
	EXO/TWICE/Jungkook	1.1	Lee Jung-jae/ Ji Chang-wook	1.1
Middle East	BTS	31.3	Lee Min-ho	12.8
	BLACKPINK	5.5	Hyun Bin	3.5
	G-Dragon	3.5	Gong Yoo/ Song Hye-kyo/ Lee Jong-suk	2.8
	IU/PSY	2.5	Jun Ji-hyun	2.3
	V	1.5	Jung Ho-yeon	2.0
Africa	BTS	30.4	Lee Min-ho	11.3
	PSY	8.2	Hyun Bin	6.0
	G-Dragon	5.7	Jun Ji-hyun/ Ji Chang-wook	3.0
	BLACKPINK	3.8	Gong Yoo	2.5
	CL/BoA	2.5	Son Ye-jin	2.3

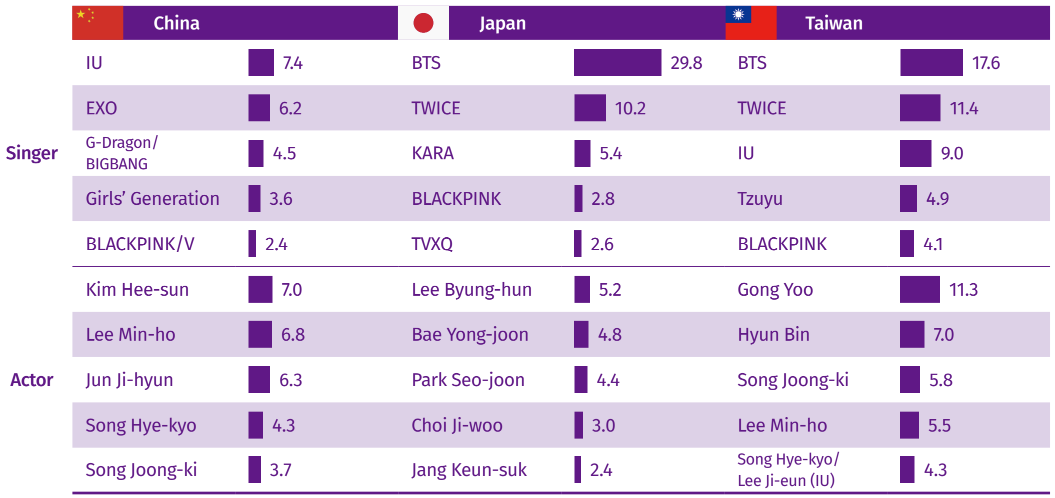
Asia and Oceania

Like in the previous year, BTS and BLACKPINK were the most preferred Korean artists overall in the region (Figure 2). In countries such as China and Japan, second-generation K-pop idols were still preferred. BTS claimed first place in Japan and five other countries, whereas BLACKPINK took the top spot in Thailand and Malaysia. In China, preference for idols who debuted relatively earlier, such as EXO, G-Dragon, BIGBANG, and Girls' Generation, was high. Notably, IU took the top spot for the first time. In Japan, Kara and TVXQ ranked third and fifth, respectively, whereas BTS, TWICE, and BLACKPINK also ranked in the top spots, showing a different trend from China. Non-Korean members of multinational groups gained more popularity in their home countries. This applied to TWICE, which has Japanese and Taiwanese members, and BLACKPINK and GOT7, which have Thai members.

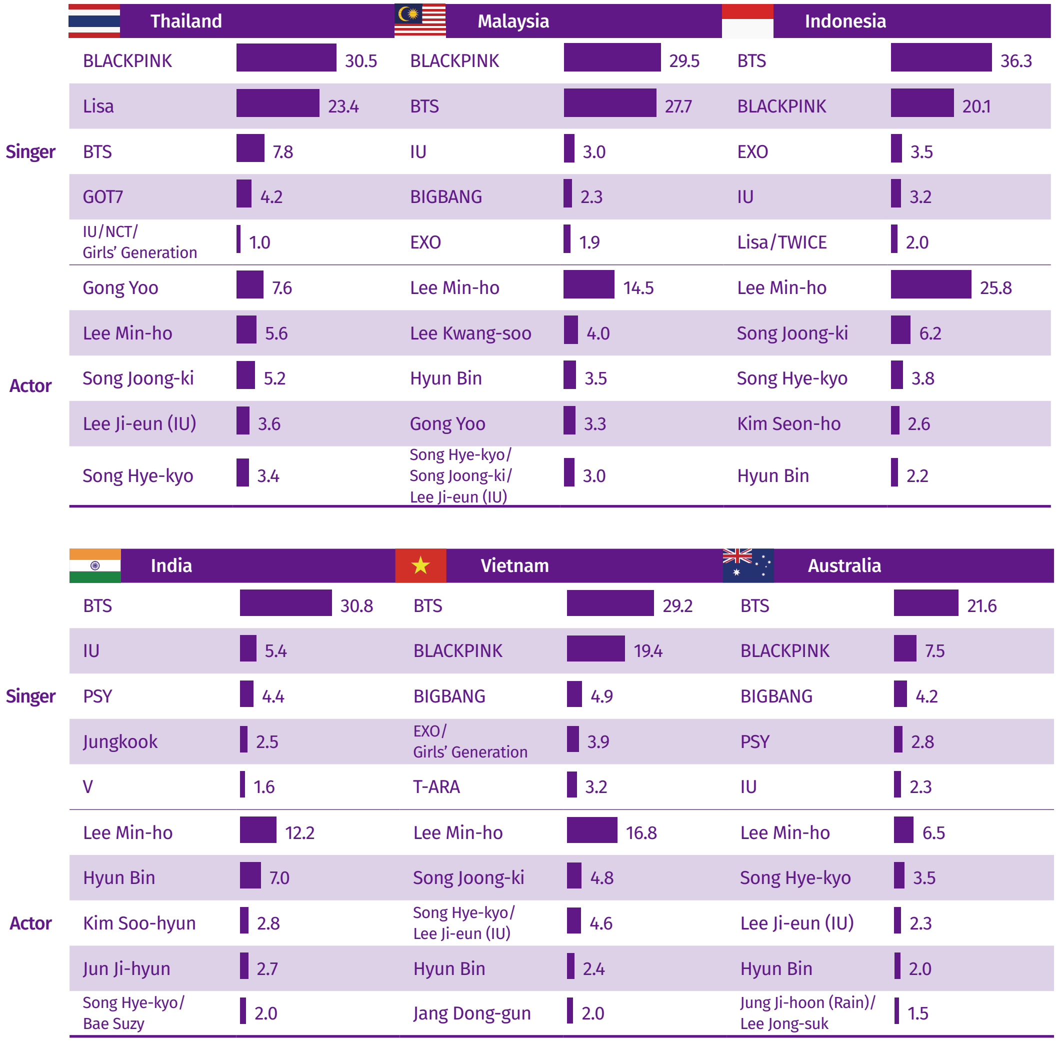
As for actors, Lee Min-ho took first place in Malaysia and four other countries. In China and Japan, like the artist preference rankings, actors who have long been popular in the countries recorded high response rates. Kim Hee-sun, Jun Ji-hyun, Song Joong-ki, and Song Hye-kyo ranked high in China. Lee Byung-hun, Bae Yong-joon, Choi Ji-woo, and Jang Geun-suk were still popular in Japan. Notably, Gong Yoo ranked first in Taiwan and Thailand.

Figure 2

(Top3, Unit: %)



	China		Japan		Taiwan	
Singer	IU	7.4	BTS	29.8	BTS	17.6
	EXO	6.2	TWICE	10.2	TWICE	11.4
	G-Dragon/ BIGBANG	4.5	KARA	5.4	IU	9.0
	Girls' Generation	3.6	BLACKPINK	2.8	Tzuyu	4.9
	BLACKPINK/V	2.4	TVXQ	2.6	BLACKPINK	4.1
Actor	Kim Hee-sun	7.0	Lee Byung-hun	5.2	Gong Yoo	11.3
	Lee Min-ho	6.8	Bae Yong-joon	4.8	Hyun Bin	7.0
	Jun Ji-hyun	6.3	Park Seo-joon	4.4	Song Joong-ki	5.8
	Song Hye-kyo	4.3	Choi Ji-woo	3.0	Lee Min-ho	5.5
	Song Joong-ki	3.7	Jang Keun-suk	2.4	Song Hye-kyo/ Lee Ji-eun (IU)	4.3



	Thailand		Malaysia		Indonesia	
Singer	BLACKPINK	30.5	BLACKPINK	29.5	BTS	36.3
	Lisa	23.4	BTS	27.7	BLACKPINK	20.1
	BTS	7.8	IU	3.0	EXO	3.5
	GOT7	4.2	BIGBANG	2.3	IU	3.2
	IU/NCT/ Girls' Generation	1.0	EXO	1.9	Lisa/TWICE	2.0
Actor	Gong Yoo	7.6	Lee Min-ho	14.5	Lee Min-ho	25.8
	Lee Min-ho	5.6	Lee Kwang-soo	4.0	Song Joong-ki	6.2
	Song Joong-ki	5.2	Hyun Bin	3.5	Song Hye-kyo	3.8
	Lee Ji-eun (IU)	3.6	Gong Yoo	3.3	Kim Seon-ho	2.6
	Song Hye-kyo	3.4	Song Hye-kyo/ Song Joong-ki/ Lee Ji-eun (IU)	3.0	Hyun Bin	2.2

	India		Vietnam		Australia	
Singer	BTS	30.8	BTS	29.2	BTS	21.6
	IU	5.4	BLACKPINK	19.4	BLACKPINK	7.5
	PSY	4.4	BIGBANG	4.9	BIGBANG	4.2
	Jungkook	2.5	EXO/ Girls' Generation	3.9	PSY	2.8
	V	1.6	T-ARA	3.2	IU	2.3
Actor	Lee Min-ho	12.2	Lee Min-ho	16.8	Lee Min-ho	6.5
	Hyun Bin	7.0	Song Joong-ki	4.8	Song Hye-kyo	3.5
	Kim Soo-hyun	2.8	Song Hye-kyo/ Lee Ji-eun (IU)	4.6	Lee Ji-eun (IU)	2.3
	Jun Ji-hyun	2.7	Hyun Bin	2.4	Hyun Bin	2.0
	Song Hye-kyo/ Bae Suzy	2.0	Jang Dong-gun	2.0	Jung Ji-hoon (Rain)/ Lee Jong-suk	1.5

Americas

As in the previous year, BTS had overwhelming popularity in the Americas, and BLACKPINK also recorded relatively high preference ratings. In all three surveyed countries, preference for BTS increased compared with the previous year, and over 40% of respondents in Argentina preferred BTS. BTS member Jimin ranked fifth and fourth in the US and Brazil, respectively, indicating that individual BTS members were also considerably popular (Figure 3).

Actor preference was divided between Lee Min-ho and Gong Yoo. Lee Min-ho ranked first in the US and Brazil, and Gong Yoo claimed the top spot in Argentina. Additionally, Gong Yoo and Lee Min-ho ranked second in Brazil and Argentina, respectively, indicating the two actors' popularity in the Americas. Meanwhile, Jung Ho-yeon and Lee Jung-jae were included in the rankings in the two South American countries, indicating that the popularity of *Squid Game* influenced the rise in recognition of the actors.

Figure 3

(Top3, Unit: %)

	US		Brazil		Argentina	
Singer	BTS	29.6	BTS	35.6	BTS	44.3
	BLACKPINK	5.6	BLACKPINK	10.5	BLACKPINK	4.9
	IU/PSY	2.2	PSY	5.2	EXO	3.3
	EXO/TWICE	0.9	Jimin	2.6	TWICE	2.5
	G-Dragon/ITZY/Taeyeon/Jimin	0.6	IU	2.2	BIGBANG	1.6
Actor	Lee Min-ho	5.2	Lee Min-ho	9.4	Gong Yoo	8.0
	Hyun Bin	2.7	Gong Yoo	4.4	Lee Min-ho	6.0
	Jun Ji-hyun	2.3	Jung Ho-yeon	3.8	Bae Suzy	5.3
	Song Hye-kyo/Park Shin-hye	1.8	Hyun Bin	3.6	Jung Ho-yeon	3.8
	Gong Yoo	1.5	Lee Jung-jae	2.2	Lee Jong-suk	3.5

Europe

BTS was the most popular K-pop group in Europe as well, with three surveyed countries recording a higher preference rating compared with the previous year (Figure 4). PSY and BLACKPINK followed in preference after BTS, although, as in the Americas, there was a sizable gap with first place. Moreover, RM, Jungkook, Jimin, and Lisa entered the rankings in each country, indicating the considerable popularity of the individual members of BTS and BLACKPINK.

Regarding actors, unlike in the previous year, Lee Min-ho ranked first in all four surveyed countries. However, Lee Min-ho's overwhelming popularity in Türkiye was the same as that in the previous year. Meanwhile, Jung Ho-yeon was included in the rankings in four countries and Lee Jung-jae in two countries, suggesting the influence of *Squid Game*'s popularity on actor preference, as in the Americas.

Figure 4

(Top3, Unit: %)

	France		UK	
Singer	BTS	31.7	BTS	21.8
	BLACKPINK	6.3	PSY	4.7
	PSY	4.2	BLACKPINK	2.4
	TWICE	1.6	IU	1.9
	RM/Sulli	1.1	Jungkook/G-Dragon	1.4
Actor	Lee Min-ho	3.3	Lee Min-ho	3.8
	Lee Jong-suk	2.8	Jun Ji-hyun/Hyun Bin	1.8
	Song Kang-ho/Jung Ho-yeon/Ji Chang-wook	1.5	Son Ye-jin	1.5
	Gong Yoo	1.0	Song Hye-kyo/Lee Jung-jae/Jung Ho-yeon	1.3
	Kim Ji-won/Kim Hyang-gi/Park Seo-joon/Bae Suzy	0.8	Ji Chang-wook	1.0

	Russia		Türkiye	
Singer	BTS	28.6	BTS	32.4
	BLACKPINK	5.5	BLACKPINK	16.4
	PSY	3.3	EXO/PSY/BIGBANG	2.9
	Jungkook/Lisa	2.2	IU	2.5
	TWICE	1.6	Jimin	2.0
Actor	Lee Min-ho	3.2	Lee Min-ho	15.8
	Jung Ho-yeon	2.0	Hyun Bin	6.0
	Kim Soo-hyun/Lee Jong-suk	1.4	Bae Suzy	4.6
	Lee Jung-jae	1.0	Lee Jong-suk	4.4
	Ma Dong-seok/Ji Chang-wook/Cha Eunwoo/Gong Yoo	0.8	Lee Sung-kyung/Jung Ho-yeon	2.4

Middle East and Africa

BTS was the most preferred K-pop group in the Middle East and Africa as well, with a slight rise in preference from the previous year. The preference rating in the UAE was 31.3% for BTS, up 2.1% from the previous year, whereas that in South Africa increased by approximately 5–30.4%. Notably, similar to other regions, BLACKPINK and PSY both ranked high, whereas G-Dragon ranked third in both countries (Figure 5). Regarding actors, Lee Min-ho was overwhelmingly popular in both regions, and Hyun Bin, Gong Yoo, and Jun Ji-hyun were also popular. In the UAE, Jung Ho-yeon of *Squid Game* was included in the rankings.

Figure 5

(Top3, Unit: %)

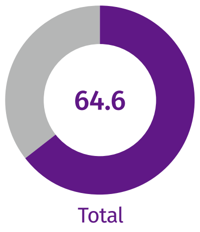
	UAE		South Africa	
Singer	BTS	31.3	BTS	30.4
	BLACKPINK	5.5	PSY	8.2
	G-Dragon	3.5	G-Dragon	5.7
	IU/PSY	2.5	BLACKPINK	3.8
	GOT7/V	1.5	CL/BoA	2.5
Actor	Lee Min-ho	12.8	Lee Min-ho	11.3
	Hyun Bin	3.5	Hyun Bin	6.0
	Song Hye-kyo/Lee Jong-suk/Gong Yoo	2.8	Jun Ji-hyun/Ji Chang-wook	3.0
	Jun Ji-hyun	2.0	Gong Yoo	2.5
	Jung Ho-yeon	2.0	Son Ye-jin	2.3

Five regions

Figure 1

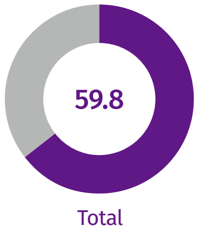
Unit: Points out of 100

Asia and Oceania



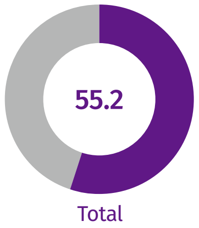
Dramas	66.8	Webtoons	58.5
Entertainment programs	63.4	Games	61.3
Movies	67.5	Fashion	67.8
Music	67.8	Beauty	69.0
Animation	59.2	Food	71.0
Books/manhwa/e-books	58.2		

Americas



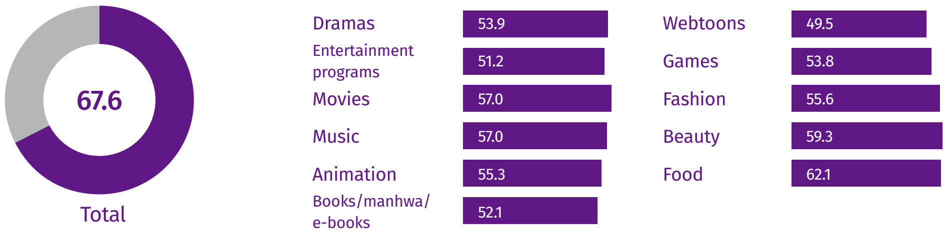
Dramas	59.1	Webtoons	54.0
Entertainment programs	57.0	Games	60.3
Movies	62.5	Fashion	59.4
Music	63.4	Beauty	60.9
Animation	61.3	Food	64.3
Books/manhwa/e-books	55.4		

Europe

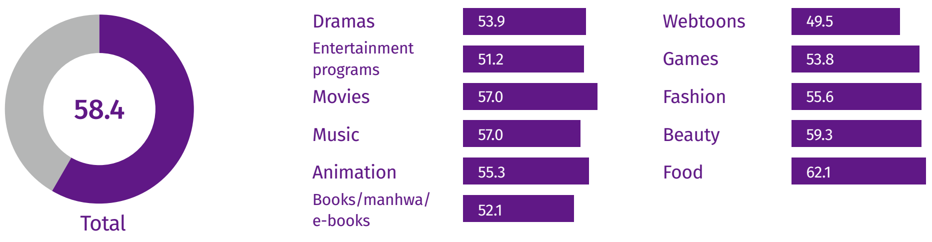


Dramas	53.9	Webtoons	49.5
Entertainment programs	51.2	Games	53.8
Movies	57.0	Fashion	55.6
Music	57.0	Beauty	59.3
Animation	55.3	Food	62.1
Books/manhwa/e-books	52.1		

Middle East



Africa



Asia and Oceania

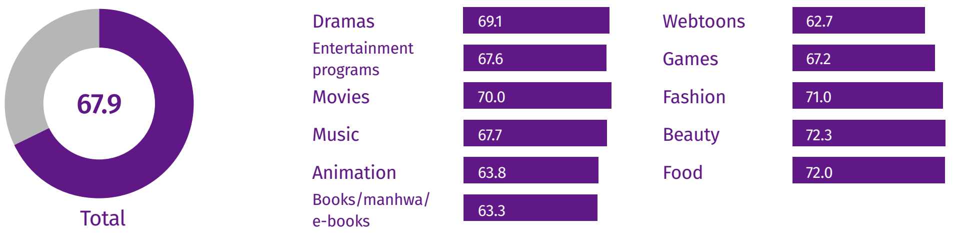
Following the Middle East, Asia and Oceania recorded the second-highest BPI among all regions. Korean food, beauty, music, and fashion in this region showed strong brand power, whereas that of publications, webtoons, and animations was relatively low (Figure 2).

Vietnam, China, and India recorded high BPI values overall, whereas Japan showed a low BPI, as in the previous year. Although Japan recorded the lowest BPI among all 18 surveyed countries, it showed a positive aspect: BPI increased by 4 points from the previous year. Korean food and beauty recorded the highest BPI in most countries. In India, the BPI difference between contents (highest to lowest = 5 points) was considerably small.

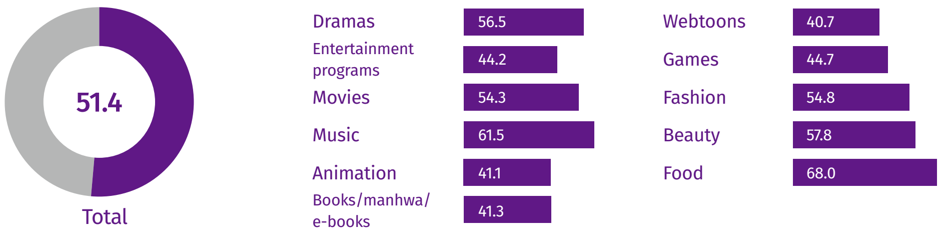
Figure 2

Unit: Points out of 100

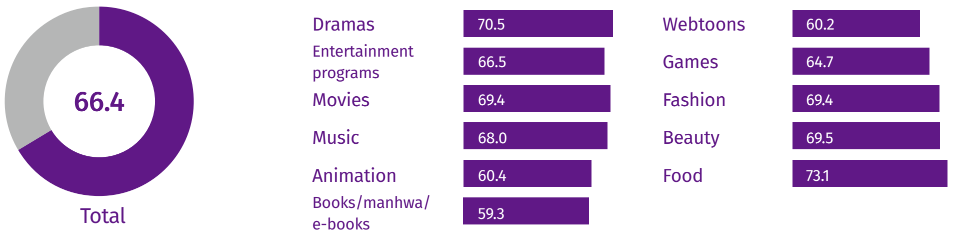
China



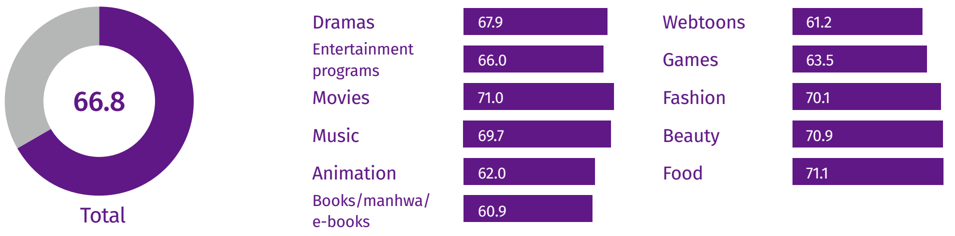
Japan

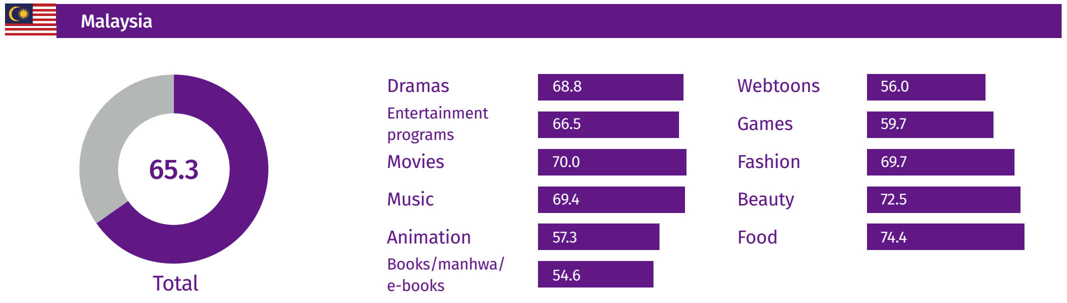


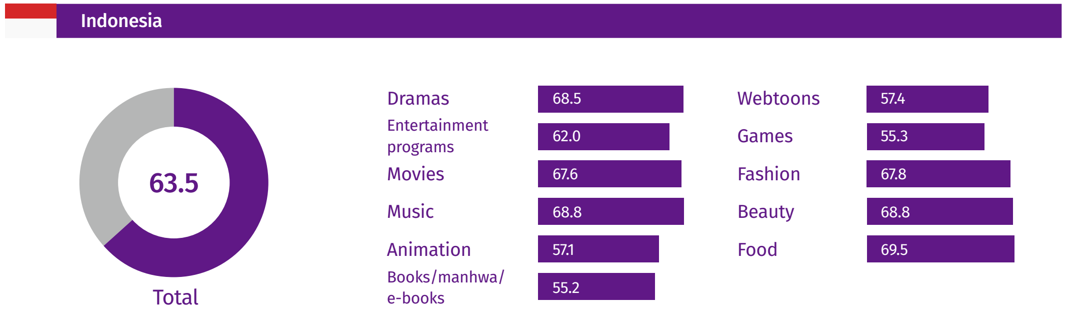
Taiwan

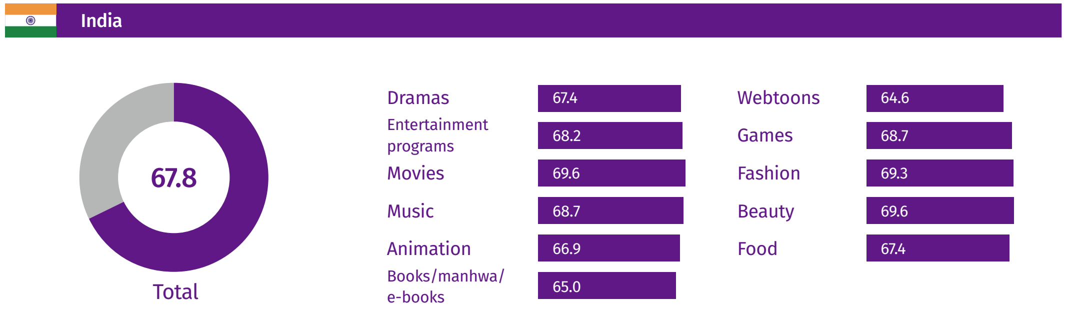


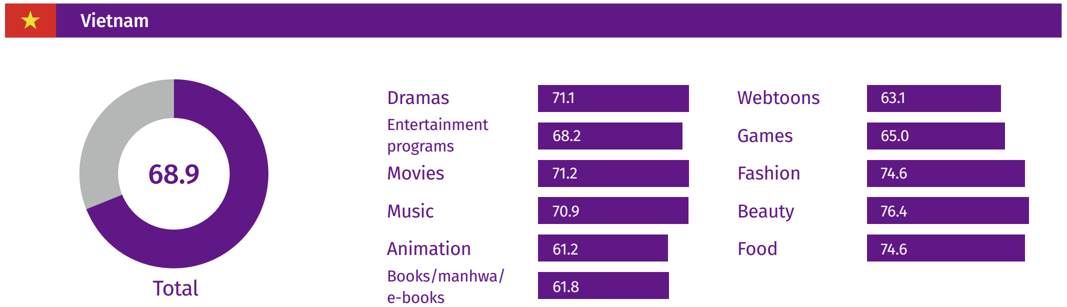
Thailand

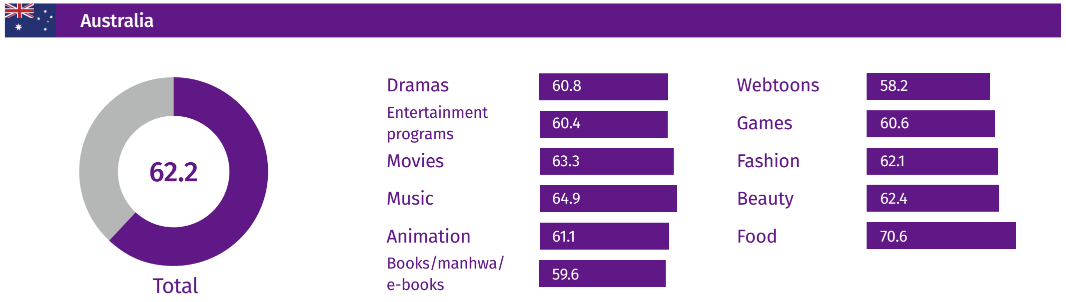










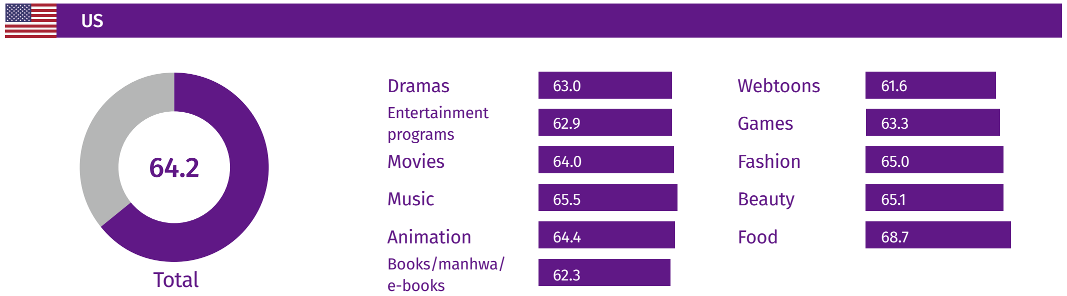


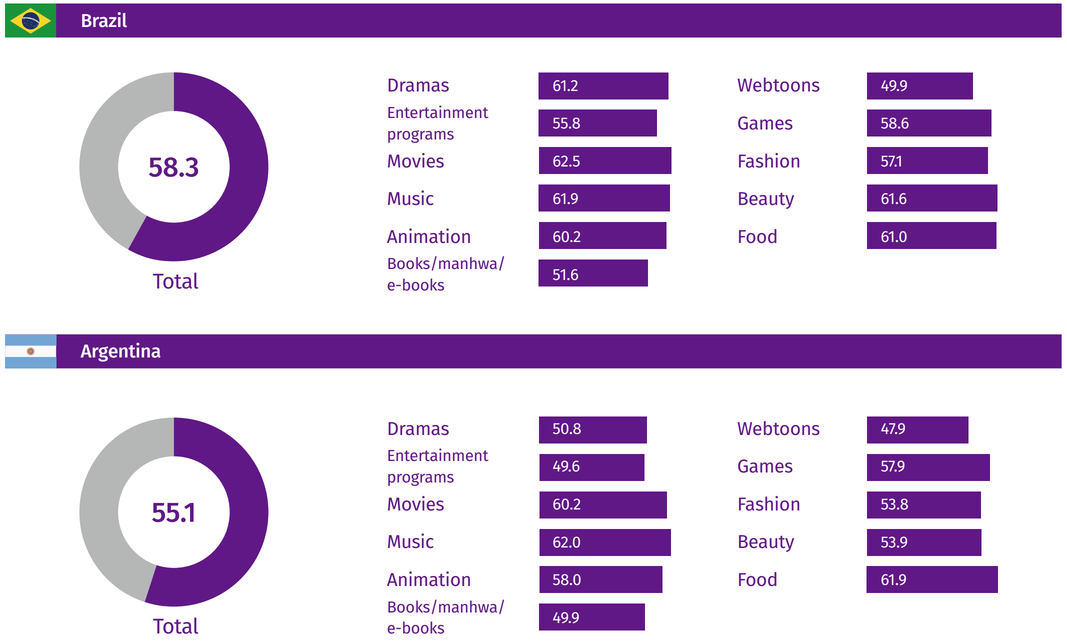
Americas

Among the five regions, the Americas recorded the third-highest BPI for Hallyu contents, and BPI increased in all three surveyed countries compared with the previous year. The US showed an increased BPI of more than 10 points from the previous year. As in Asia and Oceania, food and music brands showed strong brand power, with movies also recording high results. Conversely, publications, webtoons, and entertainment programs showed relatively low brand power (Figure 3). The US had the highest BPI in the region, unlike in the previous year (Brazil). The detailed BPI results also differed; the highest BPI was recorded for food in the US, movies in Brazil, and music in Argentina.

Figure 3

Unit: Points out of 100



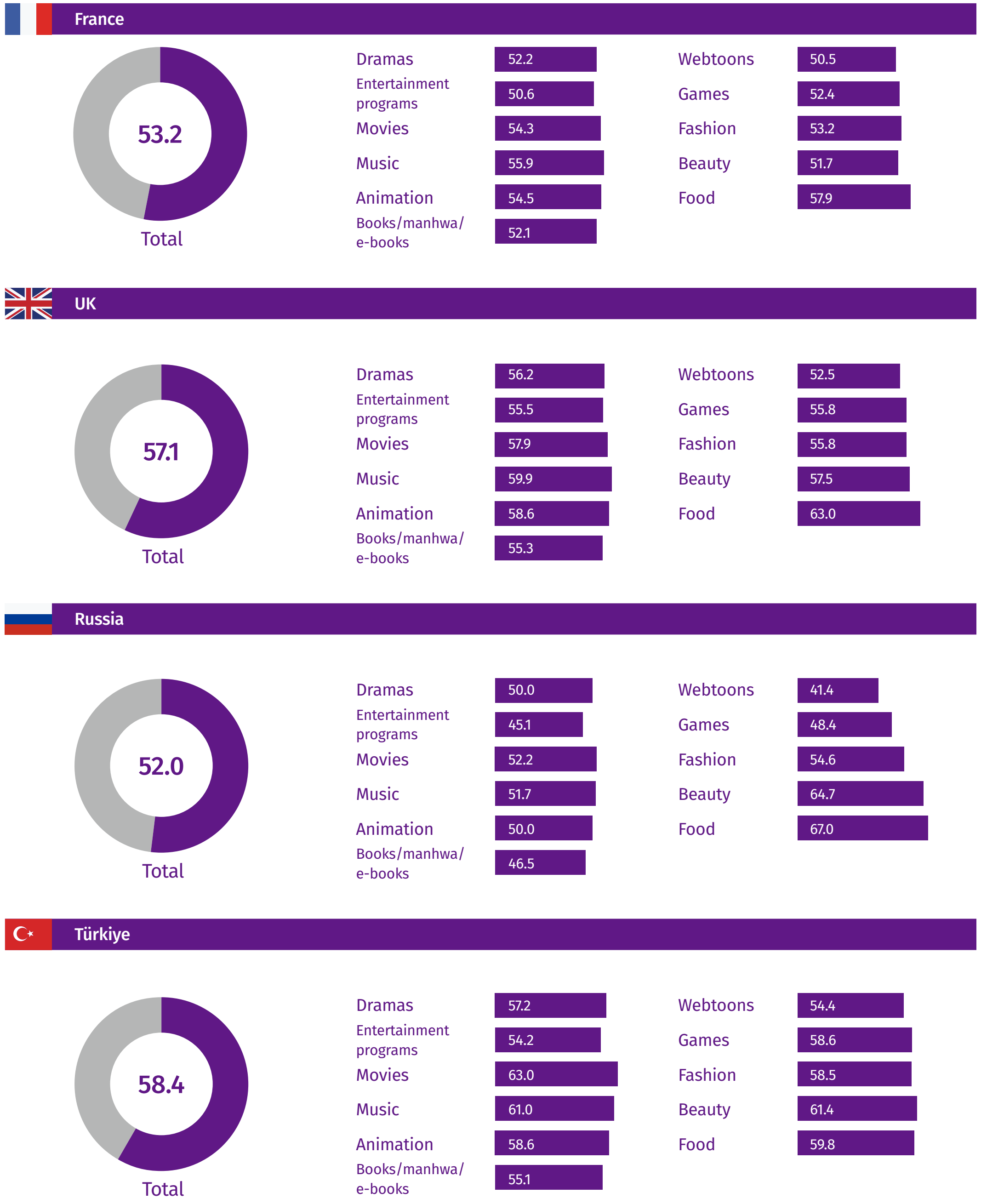


Europe

As in the previous year, Europe recorded the lowest BPI for Hallyu contents among all regions, although the BPI for France and the UK increased. Overall, food, beauty, movies, and music recorded high BPIs, whereas publications, webtoons, and entertainment programs showed relatively lower BPIs (Figure 4). Türkiye recorded the highest BPI, and the UK, which had recorded the second-lowest BPI after Japan among all surveyed countries in the previous year, showed an increase of 8 points and rose three places in the ranking. Notably, in Russia, which had the lowest BPI in the region, food and beauty showed much higher BPIs than other contents.

Figure 4

Unit: Points out of 100

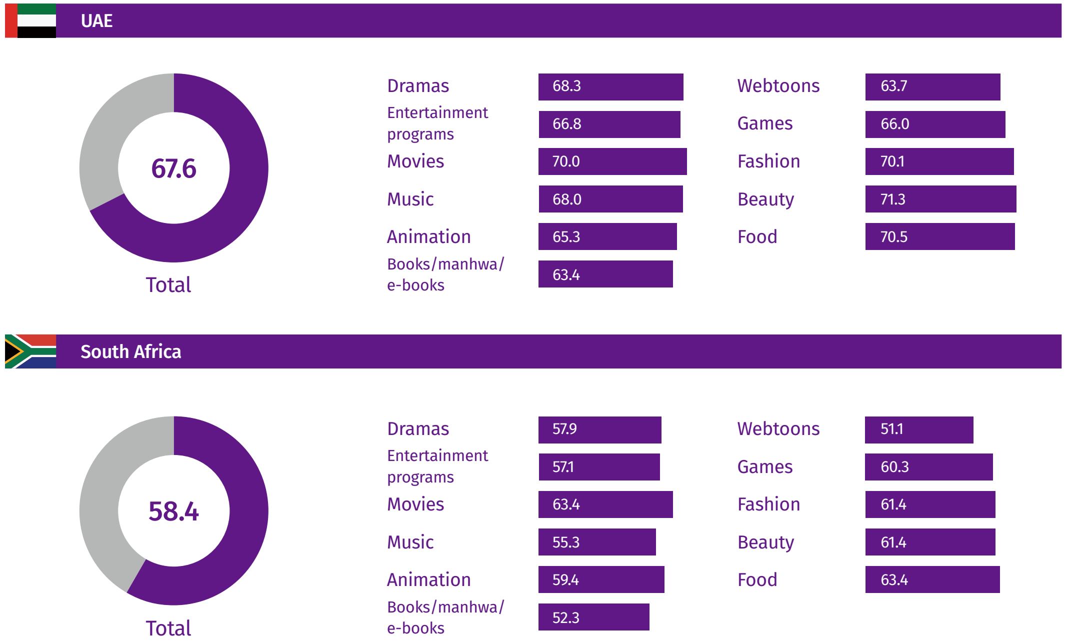


Middle East and Africa

As in the previous year, the Middle East recorded the highest BPI for Hallyu contents, and Africa recorded the lowest after Europe, showing a distinct difference between the two regions. In both regions, Korean food, beauty, fashion, and movies displayed strong brand power, whereas publications and webtoons had relatively weak brand power (Figure 5).

Figure 5

Unit: Points out of 100



GLOBAL
HALLYU
TRENDS

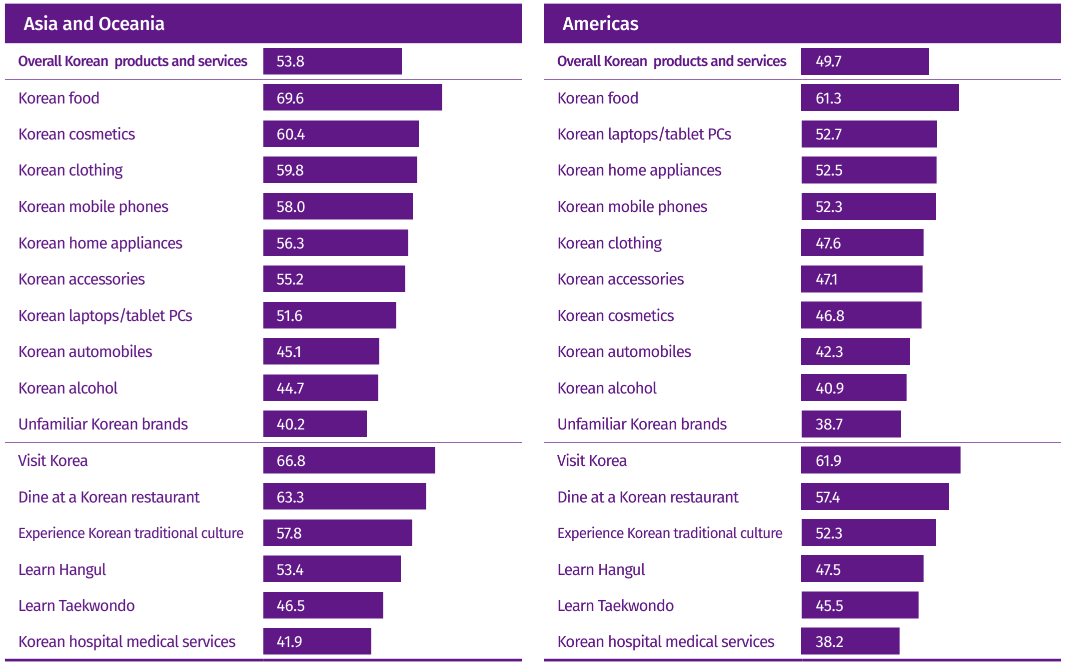
Intention to use Korean products and services in the future

Five regions

According to the survey results (Figure 1), the intention to use Korean products and services in the future was the highest in Africa, followed by the Middle East, Asia and Oceania, the Americas, and Europe. Among Korean products, the use intention for food was the highest. Among services, the intention to visit Korea was the highest. Meanwhile, the use intention for Korean alcoholic beverages and hospital medical services was the lowest in most regions.

Figure 1

(Top 2, unit: %)



Europe

Overall Korean products and services	42.1
Korean food	55.6
Korean home appliances	48.4
Korean mobile phones	48.3
Korean cosmetics	47.4
Korean laptops/tablet PCs	45.9
Korean clothing	42.7
Korean automobiles	41.6
Korean accessories	40.8
Unfamiliar Korean brands	36.3
Korean alcohol	34.6
Visit Korea	56.8
Dine at a Korean restaurant	52.6
Experience Korean traditional culture	41.4
Learn Taekwondo	35.2
Learn Hangul	34.4
Korean hospital medical services	30.5

Middle East

Overall Korean products and services	56.3
Korean clothing	65.3
Korean home appliances	63.8
Korean cosmetics	62.5
Korean food	61.0
Korean accessories	60.3
Korean mobile phones	59.3
Korean automobiles	56.5
Korean laptops/tablet PCs	55.8
Unfamiliar Korean brands	51.8
Korean alcohol	42.8
Visit Korea	67.0
Dine at a Korean restaurant	62.5
Experience Korean traditional culture	61.5
Learn Hangul	60.0
Learn Taekwondo	56.8
Korean hospital medical services	56.0

Africa

Overall Korean products and services	56.5
Korean food	71.8
Korean home appliances	66.8
Korean mobile phones	65.8
Korean clothing	65.0
Korean laptops/tablet PCs	63.8
Korean accessories	58.3
Korean automobiles	55.3
Korean cosmetics	53.5
Unfamiliar Korean brands	47.5
Korean alcohol	41.5
Visit Korea	76.5
Experience Korean traditional culture	67.5
Dine at a Korean restaurant	65.0
Learn Hangul	65.0
Learn Taekwondo	60.3
Korean hospital medical services	44.5

Asia and Oceania

Of the five regions, Asia and Oceania showed the third-highest use intention for Korean products and services in the future. Among Korean products, the intention to purchase food, cosmetics, and clothing was strong; among services, the desire to visit Korea and dine at Korean restaurants was comparatively strong (Figure 2). By country, respondents in Thailand, Malaysia, India, Vietnam, and Australia exhibited above-average use intention, whereas those in Japan and Indonesia showed markedly low use intention. Japan recorded the lowest use intention among all 18 surveyed countries, as in the previous year; except for purchasing Korean food and cosmetics and dining at Korean restaurants, all products and services recorded a low response rate at 10% to 20%. Conversely, the use intention for services in Australia increased by 18% from the previous year. In particular, the intention to purchase Korean food, dine at Korean restaurants, and visit Korea ranged from 65% to 70%.

Figure 2

(Top 2, unit: %)

China

Overall Korean products and services	52.7
Korean food	68.3
Korean cosmetics	66.5
Korean clothing	61.7
Korean accessories	60.3
Korean home appliances	56.7
Korean mobile phones	56.0
Korean laptops/tablet PCs	53.8
Korean alcohol	52.7
Korean automobiles	46.7
Unfamiliar Korean brands	46.3
Visit Korea	65.5
Dine at a Korean restaurant	63.7
Experience Korean traditional culture	60.3
Learn Hangul	53.3
Learn Taekwondo	51.7
Korean hospital medical services	47.5

Japan

Overall Korean products and services	18.6
Korean food	50.0
Korean cosmetics	32.6
Korean clothing	29.6
Korean accessories	24.8
Korean alcohol	21.6
Korean home appliances	17.6
Korean mobile phones	17.6
Korean laptops/tablet PCs	12.2
Unfamiliar Korean brands	11.0
Korean automobiles	8.6
Dine at a Korean restaurant	31.4
Visit Korea	29.6
Learn Hangul	21.0
Experience Korean traditional culture	17.4
Learn Taekwondo	8.6
Korean hospital medical services	8.4

Taiwan

Overall Korean products and services	51.5
Korean food	73.8
Korean clothing	57.0
Korean cosmetics	56.8
Korean mobile phones	56.8
Korean home appliances	50.3
Korean alcohol	48.0
Korean laptops/tablet PCs	43.3
Korean accessories	42.8
Korean automobiles	34.5
Unfamiliar Korean brands	31.3
Dine at a Korean restaurant	70.8
Visit Korea	67.8
Experience Korean traditional culture	56.0
Learn Hangul	44.0
Learn Taekwondo	31.0
Korean hospital medical services	27.0

Thailand

Overall Korean products and services	58.2
Korean food	72.8
Korean clothing	68.6
Korean cosmetics	66.4
Korean home appliances	63.4
Korean mobile phones	63.4
Korean accessories	60.0
Korean laptops/tablet PCs	59.2
Korean alcohol	53.8
Unfamiliar Korean brands	47.4
Korean automobiles	44.8
Visit Korea	71.4
Dine at a Korean restaurant	70.6
Experience Korean traditional culture	65.4
Learn Hangul	62.6
Learn Taekwondo	51.6
Korean hospital medical services	47.8

Malaysia

Overall Korean products and services	54.8
Korean food	73.0
Korean mobile phones	63.0
Korean cosmetics	62.3
Korean clothing	60.3
Korean home appliances	57.5
Korean accessories	55.3
Korean laptops/tablet PCs	53.3
Korean automobiles	44.8
Unfamiliar Korean brands	39.5
Korean alcohol	28.3
Visit Korea	75.3
Dine at a Korean restaurant	73.0
Experience Korean traditional culture	59.3
Learn Hangul	57.8
Learn Taekwondo	46.8
Korean hospital medical services	36.3

Indonesia

Overall Korean products and services	46.8
Korean food	67.6
Korean mobile phones	63.2
Korean home appliances	57.6
Korean clothing	55.6
Korean cosmetics	55.2
Korean laptops/tablet PCs	54.6
Korean accessories	52.4
Korean automobiles	43.0
Unfamiliar Korean brands	29.6
Korean alcohol	27.6
Visit Korea	73.8
Dine at a Korean restaurant	61.4
Learn Hangul	59.8
Experience Korean traditional culture	57.8
Learn Taekwondo	46.8
Korean hospital medical services	40.4

India

Overall Korean products and services	70.7
Korean clothing	74.8
Korean food	74.7
Korean mobile phones	74.2
Korean accessories	73.3
Korean cosmetics	72.7
Korean home appliances	72.5
Korean laptops/tablet PCs	70.8
Korean automobiles	67.0
Unfamiliar Korean brands	62.3
Korean alcohol	56.0
Visit Korea	75.7
Experience Korean traditional culture	71.5
Dine at a Korean restaurant	70.2
Learn Hangul	67.8
Learn Taekwondo	67.7
Korean hospital medical services	61.7

Vietnam

Overall Korean products and services	73.2
Korean food	77.4
Korean cosmetics	74.0
Korean clothing	72.4
Korean mobile phones	72.4
Korean home appliances	71.6
Korean accessories	64.8
Korean laptops/tablet PCs	62.4
Korean alcohol	57.8
Korean automobiles	56.8
Unfamiliar Korean brands	43.0
Visit Korea	77.0
Dine at a Korean restaurant	72.0
Experience Korean traditional culture	70.6
Learn Hangul	58.6
Learn Taekwondo	55.6
Korean hospital medical services	53.0

Australia

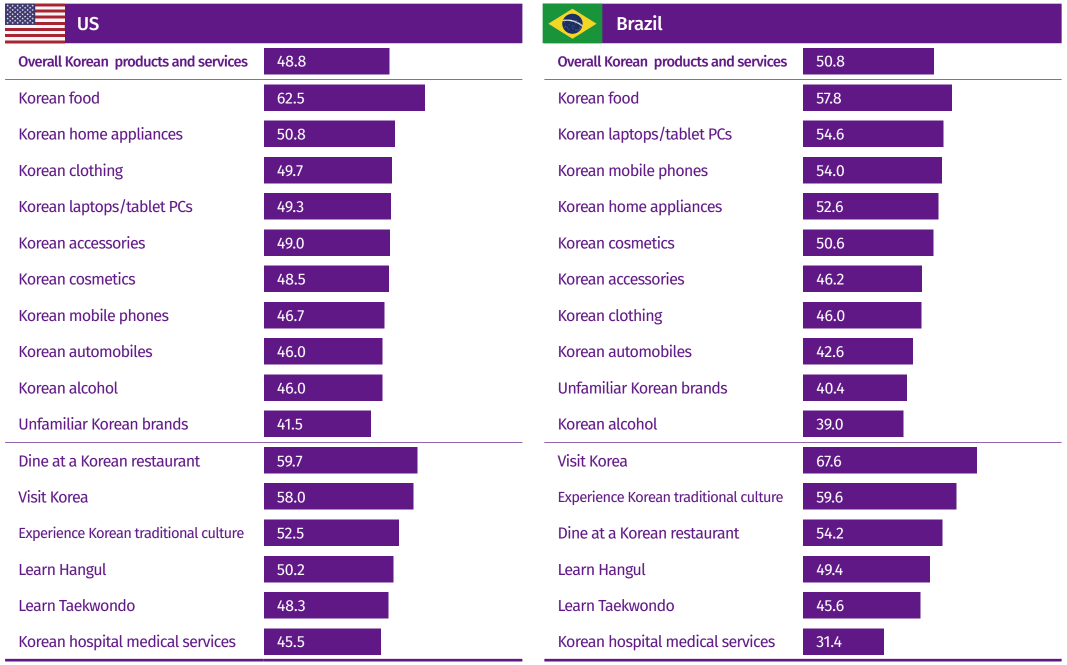
Overall Korean products and services	55.0
Korean food	69.5
Korean accessories	56.0
Korean home appliances	55.0
Korean automobiles	54.5
Korean clothing	53.3
Korean mobile phones	52.5
Korean automobiles	54.5
Korean alcohol	51.0
Korean laptops/tablet PCs	49.0
Unfamiliar Korean brands	45.0
Dine at a Korean restaurant	67.3
Visit Korea	65.5
Experience Korean traditional culture	59.0
Learn Taekwondo	51.8
Learn Hangul	51.0
Korean hospital medical services	47.0

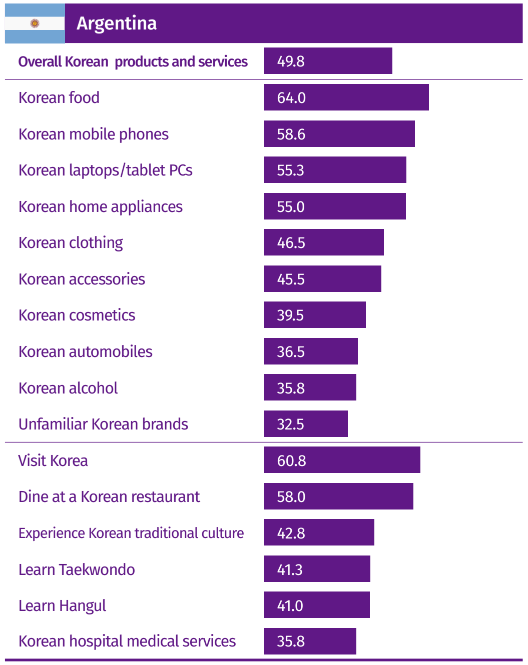
Americas

After Europe, the Americas recorded the lowest future use intention for Korean products and services among all regions. However, compared with the previous year, the intention to use services increased in all three surveyed countries (Figure 3). Among products, the intention to purchase food and laptop/tablet PCs was high, and among services, the desire to visit Korea and dine at Korean restaurants was evident. Overall, the intention to use Korean products and services in the US surged by approximately 15% compared with the previous year, and the desire to purchase Korean food and home appliances was especially high. In Brazil, use intention increased by about 6% from the previous year, and the results indicated a strong desire to purchase Korean food, laptop/tablet PCs, and mobile phones. In Argentina, use intention rose by approximately 4% from the previous year, and the detailed use intention results were similar to those of Brazil.

Figure 3

(Top 2, unit: %)



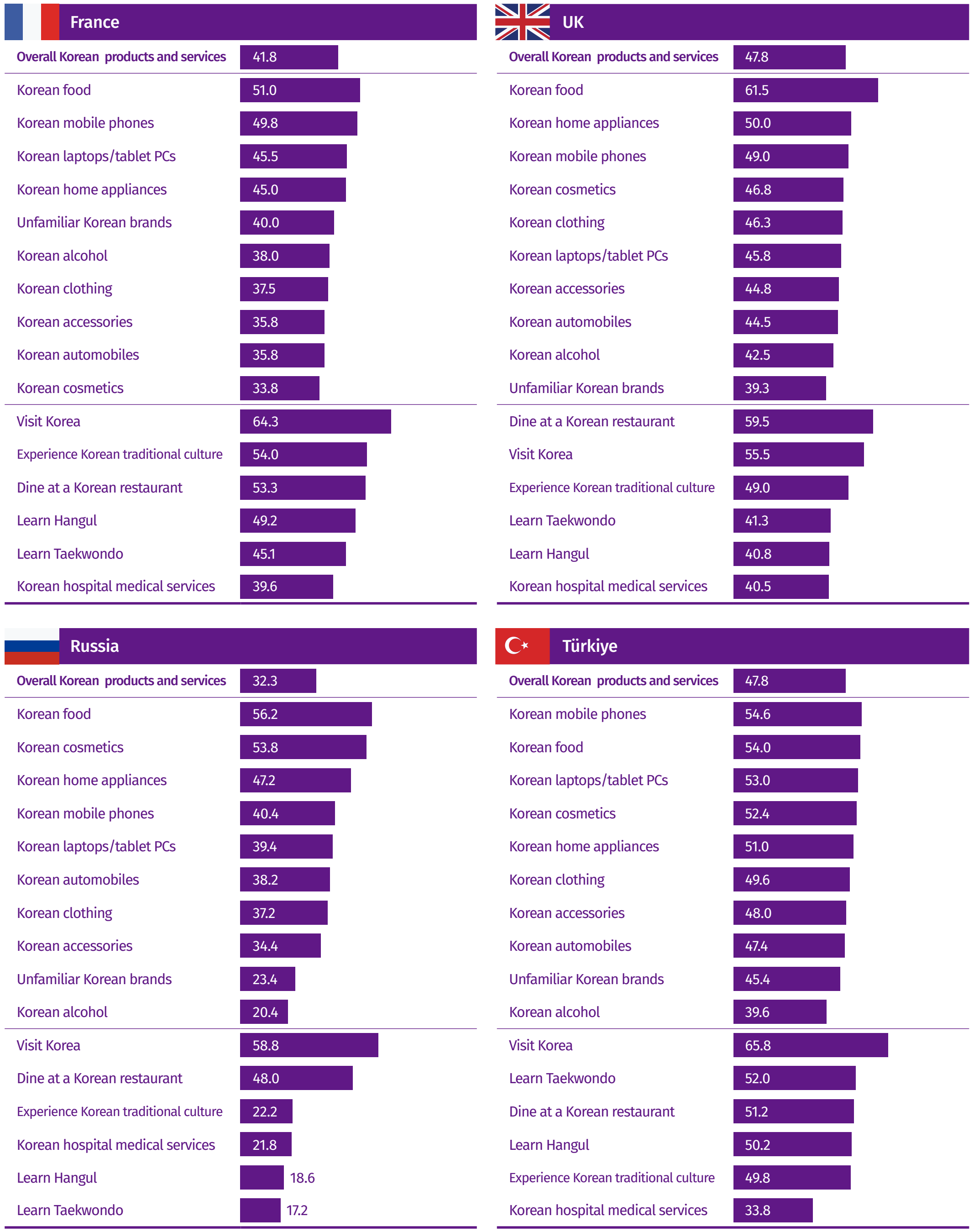


Europe

Europe recorded the lowest intention to use Korean products and services of all regions, although the response rates slightly increased from the previous year. Overall, the desire to purchase Korean food, mobile phones, cosmetics, and home appliances was strong, and the intention to visit Korea was also high (Figure 4). The UK and Türkiye showed the highest use intentions; the UK's result increased by approximately 20% compared with the previous year, and the intention to purchase Korean food and dine at restaurants was particularly high. Conversely, Russia showed the second-lowest results after Japan among all surveyed countries, with a 7% decrease in use intention compared with the previous year.

Figure 4

(Top 2, unit: %)

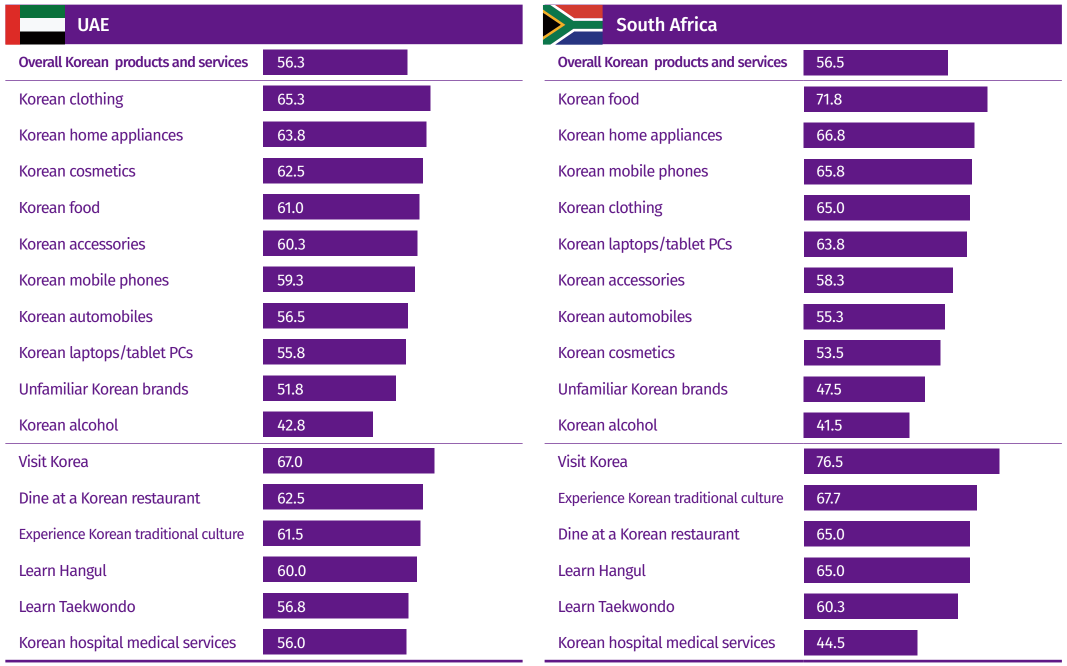


Middle East and Africa

Africa and the Middle East displayed the highest intention to use Korean products and services among all regions. Compared with the previous year, use intention increased by 12.5% in Africa and 8.5% in the Middle East. Respondents in the Middle East showed a high intention to purchase Korean clothing, home appliances, and cosmetics and visit Korea and dine at restaurants. Respondents in Africa showed a high intention to purchase Korean food, home appliances, and mobile phones and visit Korea and experience traditional culture (Figure 5).

Figure 5

(Top 2, unit: %)



Intention to pay for Hallyu contents in the future

Five regions

The average intention to pay for Hallyu contents in the future across all regions was 46.2%, approximately 10% higher compared with the previous year. The intention to pay for Hallyu contents increased in all regions compared with the previous year; the Middle East showed the highest intention, and Europe recorded the lowest. By contents, the intention to pay for Korean movies was the highest in all regions. Overall, the intention to pay for dramas and games was relatively high, whereas that for publications and webtoons was low (Figure 1).

Figure 1

(Top 2, unit: %)

Asia and Oceania

The average intention to pay for all Hallyu contents was 47.9%. China, Thailand, India, and Vietnam recorded above-average results, whereas Japan, Taiwan, Malaysia, Indonesia, and Australia recorded below-average results. As in the previous year's survey, India recorded the highest intention to pay for contents among all 18 surveyed countries, whereas Japan recorded the lowest for the fourth consecutive year. However, the results in Japan were somewhat positive in that the intention to pay for Hallyu contents increased by 2% from the previous year (Figure 2). By contents type, the intention to pay for movies was the highest in all countries. Overall, many respondents were willing to pay for dramas, music, and games. Conversely, in most countries, the intention to pay for animations, webtoons, and publications was below the average for all contents types.

Figure 2

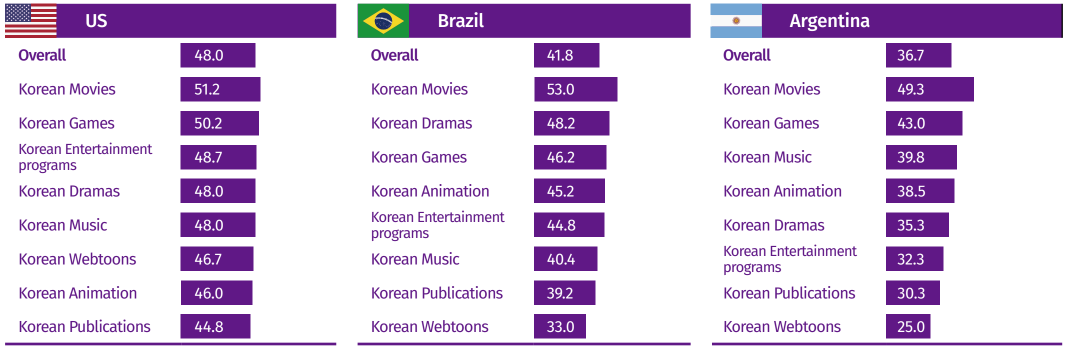
(Top 2, unit: %)

Americas

The average intention to pay for Hallyu contents in the Americas was 43.5%, lower than the average across all regions but 8% higher from the previous year. Respondents from the US expressed a higher intention than the regional average. The response rate in Brazil and Argentina was lower than the regional average. In the US, use intention increased by 16% from that in the previous year, and the variation between contents types was not large (6.4%). Conversely, in Brazil, use intention was the same as in the previous year, and the variation between contents types was considerably large at 20%. In Argentina as well, the variation in use intention between types exceeded 24%, indicating that South American respondents more clearly distinguished paid contents consumption compared with North American respondents. By contents type, the intention to pay for movies and games was high overall, but that for webtoons and publications was low in all three surveyed countries (Figure 3).

Figure 3

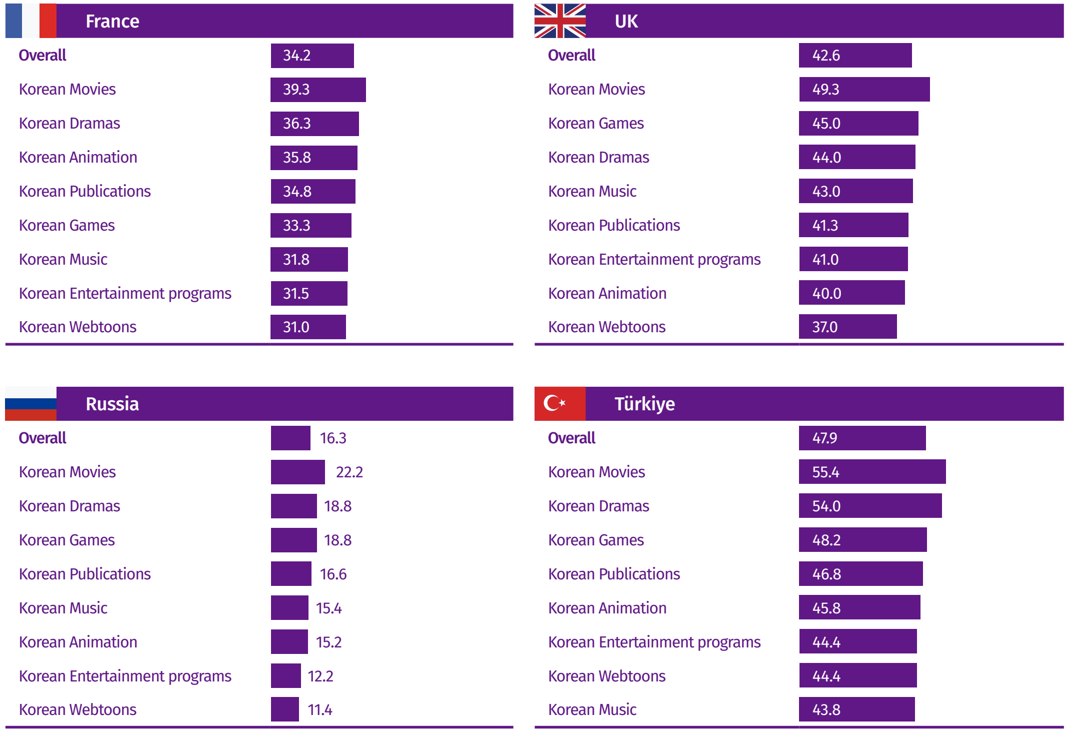
(Top 2, unit: %)



Europe

Of the five regions, Europe reported the lowest average intention to pay for Hallyu contents at 34.9%, up 5% from the previous year's survey. Similar to the previous year, respondents in the UK and Türkiye showed a relatively high intention to pay for contents, whereas those in Russia reported the lowest intention not only in the region but among all surveyed countries. The intention to pay for contents in the UK increased by about 17% compared with the previous year. By type, the intention to pay for movies, dramas, and games was high overall, whereas that for entertainment programs and webtoons was low in all four surveyed countries. Meanwhile, the intention to pay for music was considerably low in Türkiye, a deviation from the average trend (Figure 4).

Figure 4

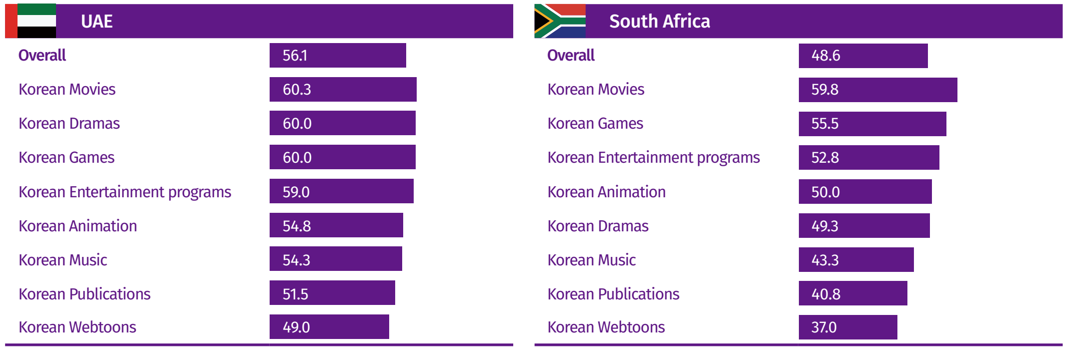


Middle East and Africa

In the Middle East and Africa, the average intention to pay for Hallyu contents was 56.1% and 48.6%, respectively. The Middle East reported the highest results among all regions, as in the previous year, followed by Africa. The results in the two regions increased by 14.2% and 14.5% from the previous year, respectively. Respondents from both regions showed a high intention to pay for movies and games and a low intention to pay for publications and webtoons, similar to the other regions (Figure 5).

Figure 5

(Top 2, unit: %)



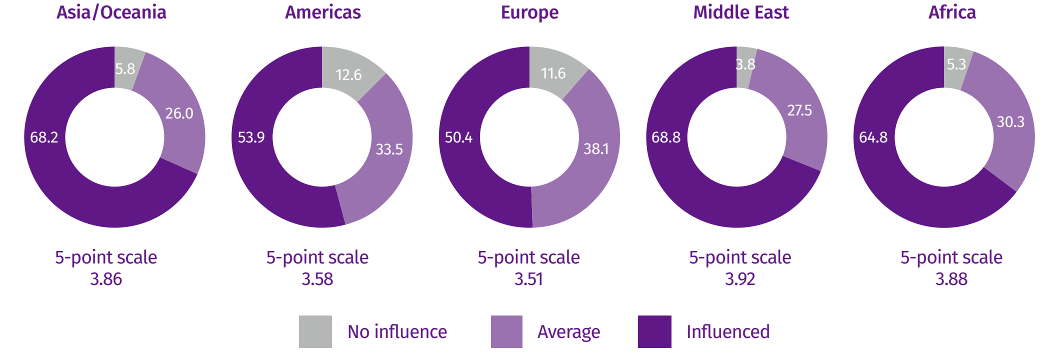
Influence of consuming Hallyu contents on purchasing or using Korean products and services

Five regions

As in the previous year, the respondents were asked whether consuming Hallyu contents influenced their purchase or use of Korean products and services. More responded in the affirmative, compared with those who responded with “No influence” or “Neutral” (Figure 1). More than 60% of the respondents in Asia and Oceania, the Middle East, and Africa reported that they were influenced, with a score of 3.8 on a five-point scale. In particular, in the Middle East, the ratio of influenced respondents jumped by 15.5% from the previous year, a 0.3 increase on a 5-point scale. In the Americas and Europe, the proportion of influenced respondents exceeded 50%, rising by 4.5% and 4.6% from the previous year, respectively.

Figure 1

(unit: %, point)

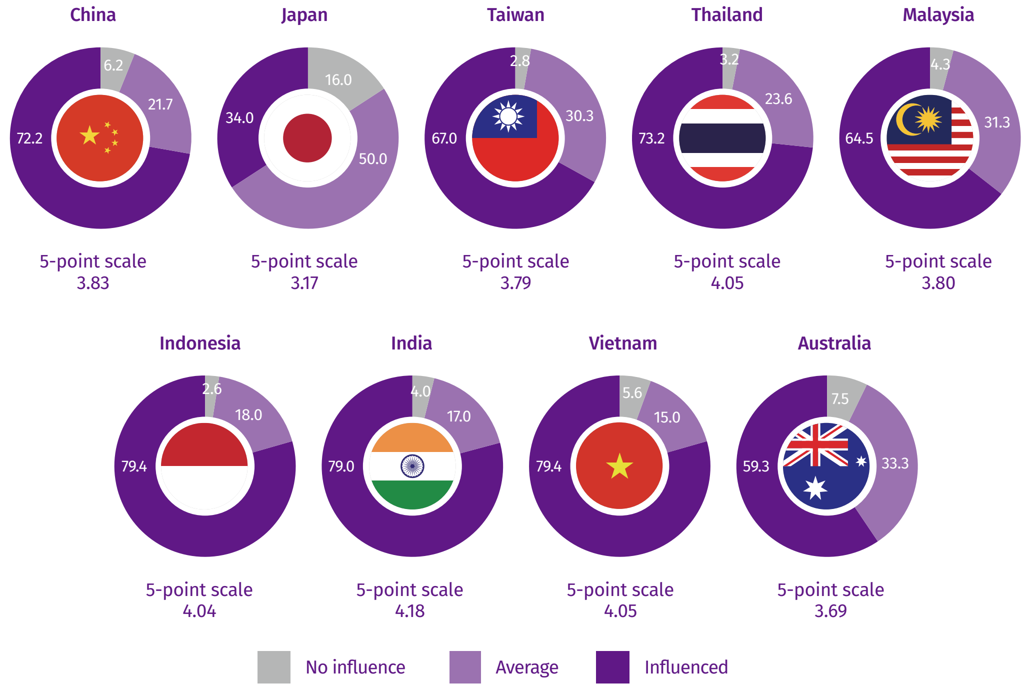


Asia and Oceania

Consuming Hallyu contents had a large influence on the use of Korean products and services in Asia and Oceania. Although the absolute number increased from the previous year, the Middle East and Africa recorded higher increase rates, outranking Asia and Oceania. In China, India, and Southeast Asian countries, the ratio of influenced respondents exceeded 70%, all scoring at least 3.8 points on a five-point scale. In particular, India showed the highest score of 4.18 among all surveyed countries, whereas Japan scored the lowest at 3.17, as in the previous year (Figure 2).

Figure 2

(unit: %, point)

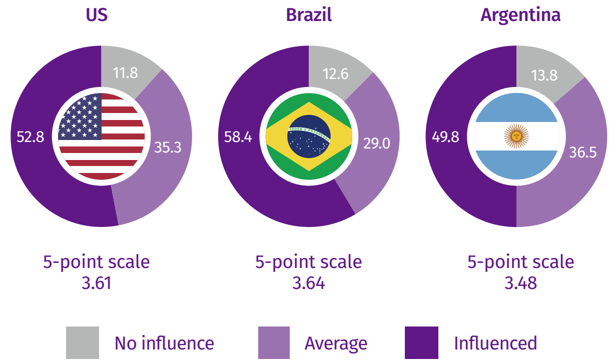


Americas

Only in Argentina did fewer than 50% of the respondents answer that consuming Hallyu contents influenced their use of Korean products and services. In the US and Brazil, over 50% of the respondents answered that they were influenced. In particular, in the US, the proportion of influenced respondents increased by 9.8% from the previous year, rising 0.22 points on a five-point scale (Figure 3).

Figure 3

(unit: %, point)

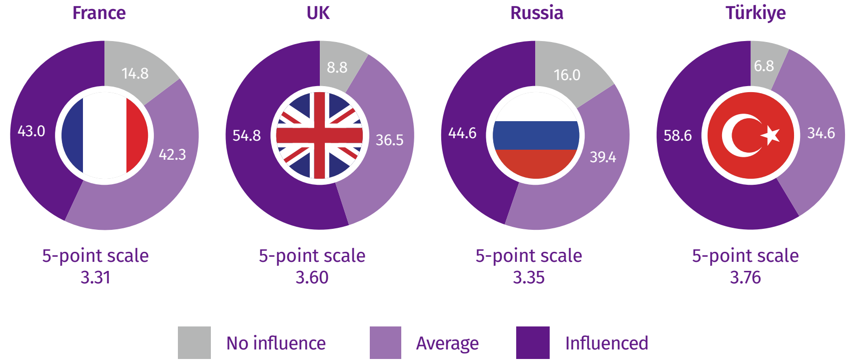


Europe

As in the previous year, consuming Hallyu contents had the least influence on the use of Korean products and services in Europe (Figure 4). However, the ratio of influenced respondents in the UK rose by 17.4% from the previous year, an increase of 0.27 points on a 5-point scale. Although Türkiye also recorded a slight decline compared with the previous year, the influence of Hallyu contents remained strong.

Figure 4

(unit: %, point)



Middle East and Africa

The influence of Hallyu contents significantly increased compared with the previous year. In both regions, the ratio of influenced respondents rose by 15.3% and 7.8% from the previous year, respectively, an increase of 0.3 and 0.2 points on a five-point scale. The proportion of respondents who were not influenced was only 3.8% and 5.3%, respectively (Figure 5).

Figure 5

(unit: %, point)