2022 MUSIC INDUSTRY WHITE PAPER

SUMMARY

Part 1 Music User Trends

1) Research Objectives and Overview

The objectives of this survey are to provide necessary information to music content users and producers through statistical user data and to use it as primary data for policy establishment for industrial promotion.

The survey was conducted on the general use of music for all citizens between the ages of 10 and 69. The survey is based on the period from 2021 to 2022, and the overall aspects of the usage patterns of domestic music users were measured. The detailed survey consisted of music use service, music purchase (physical album) behavior, viewing of offline music performance, use and measure of music use, fandom activity status, and etc.

2) Research Design

The subjects of this research include Koreans between the ages of 10 to 69, living in Korea, and who have been using music content "at least once every 2 to 3 months" in the past year. The survey was conducted once a year, and in cases where there were no separate mentions concerning content use research, the response standard covered the period from July 2021 to July 2022 (the past year). Data collection began through an online research method from July 22 to August 22, 2022. To increase the reliability, the collected data went through the process of editing and cleaning according to the professional verification process.

표 1 2021 Factual Research Design for Music Users

Classification	Content
Target Population	• All Koreans ages 10 to 69
Research Population	• Koreans ages 10 to 69 who used music contents "at least once every 2 to 3 months" over the past year
Research Area	• Nationwide
Data Collection Method	• Online structural survey
Sample Framework	• Resident Registration Population Statistics data as of June 2022 provided by the Ministry of the Interior and Safety • A total of 1,170,000 research panels nationwide were used as the sample framework of the research institution.
Sampling Method	• Proportional allocation according to gender/age/region
Sampling Error	• ±1.66%p p at 95% confidence level
Valid Sample	• 3,500 people
Data Collection Period	• July to August 2022 (Jul. 22 – Aug. 26)

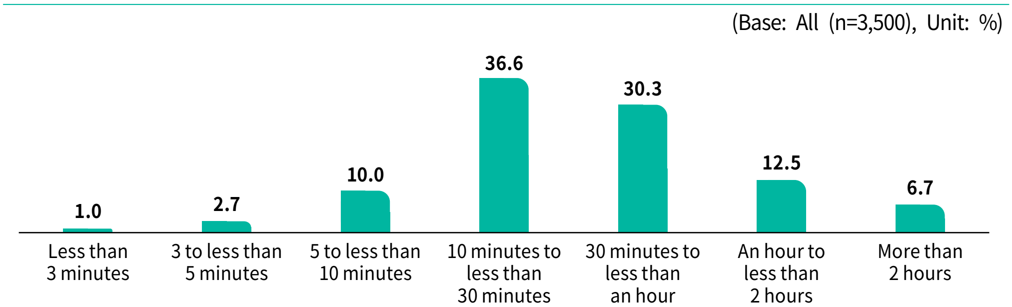
3) Main Research Results

3.1 Overall status of the general use of music

(1) Time slot for listening to music

Regarding the time slot for listening to music, the highest response was "10 minutes to less than 30 minutes" for one-time use when using it once at 36.6%, followed by "30 minutes to less than an hour" at 30.3%.

Figure 1 Time Slot for Listening to Music (for One-time Use)

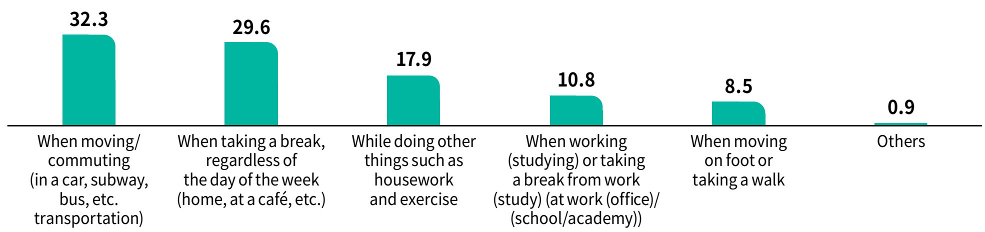


(2) Situation or place for listening to music

For the place or occasion for listening to music, "when moving/commuting (in a car, subway, bus, etc. transportation)" was the most selected response with 32.3%, followed by "when taking a break, regardless of the day of the week (home, at a café, etc.) (29.6%)," and "while doing other things such as housework and exercise (17.9%)."

Figure 2 Occasionor Place for Listening to Music

(Base: All (n=3,500), Unit: %)



Note) A new question created in 2022

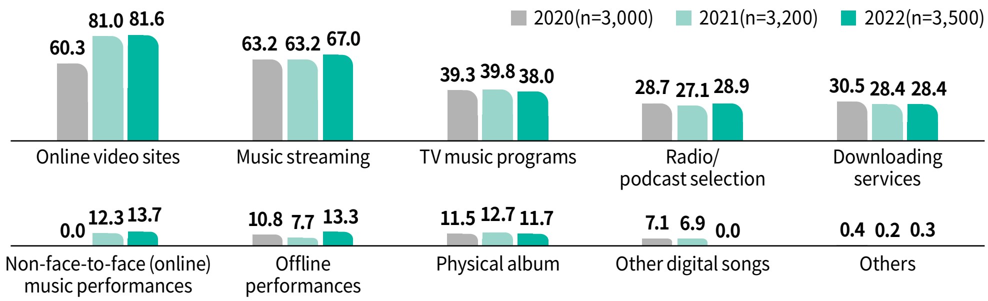
3.2. Method of listening to music

(1) Means of use or service for listening to music

In regard to the means of use or service used to listen to music, "Online video sites" was the most commonly used service at 81.6%, followed by "Music streaming (67.0%)" and "TV music programs (38.0%)."

Figure 3 Means of Use or Service for Listening to Music

(Base: All, multiple responses, Unit: %)

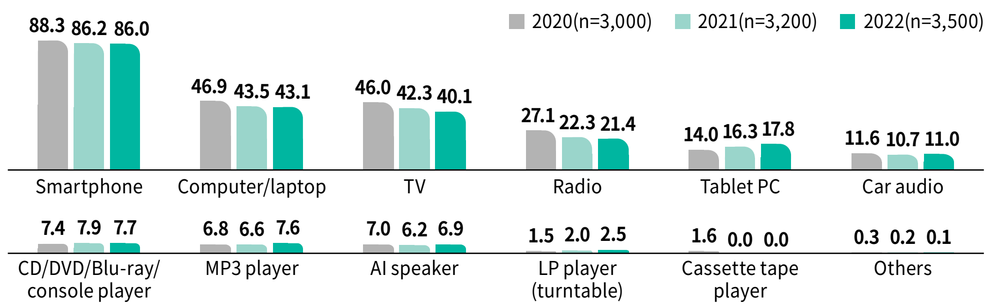


(2) Primary device used for listening to music

In regard to the primary device used for listening to music (based on 1+2+3 rankings), "Smartphone" was the most frequently used device with 86.0%, followed by "Computer/laptop (43.1%)," "TV (40.1%)," etc.

Figure 4 Primary Device Used for Listening to Music

(Base: All, multiple responses, Unit: % (based on 1+2+3 rankings))



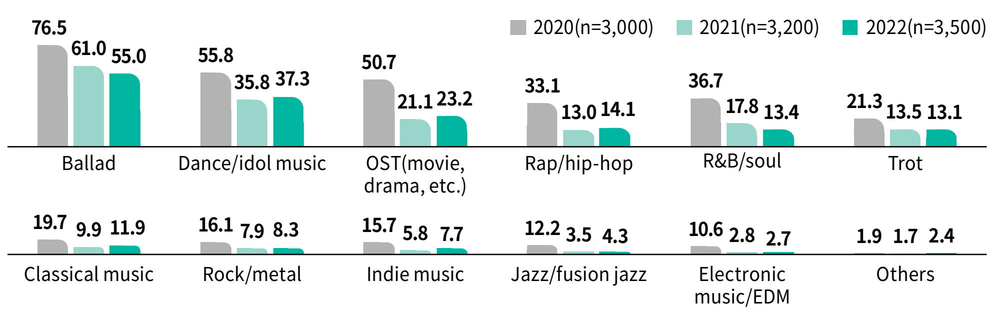
Note) "Cassette tape player" has been removed in 2021.

(3) Favorite music by genre

Based on the favorite music by genre, "Ballad" was the most popular genre at 55.0%, but it has shown a decreasing trend since 2020. It was followed by "Dance/idol music" at 37.3% and "OST (movie, drama, etc.)" at 23.2%.

Figure Favorite Music by Genre

(Base: All, multiple responses, Unit: % (based on 1+2 rankings))



Note It has been changed from the plural type (select all responses) in 2020 to the ranking type in 2021, so be careful when comparing them directly.

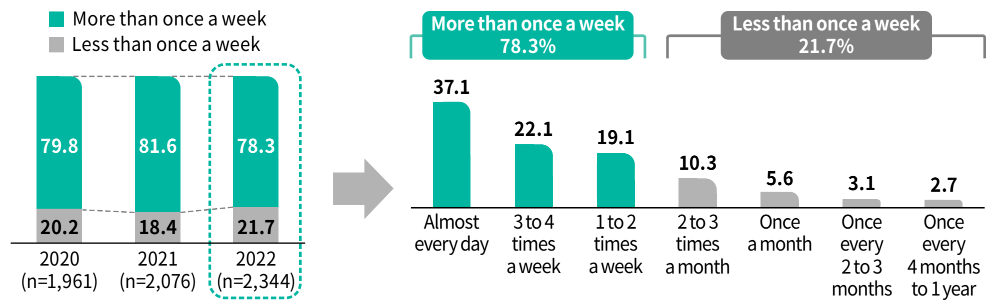
3.3 Use status of music streaming and downloading service

(1) Frequency of using music streaming and downloading services

The rate of using music streaming services "More than once a week" is 78.3%, a 3.3%p drop from the previous year. Looking at the characteristics of the respondent, it was relatively higher in women than men and in the 20s and 30s by age.

Figure 6 Frequency of Using Music Streaming Services

(Base: Music streaming service users, Unit: %)

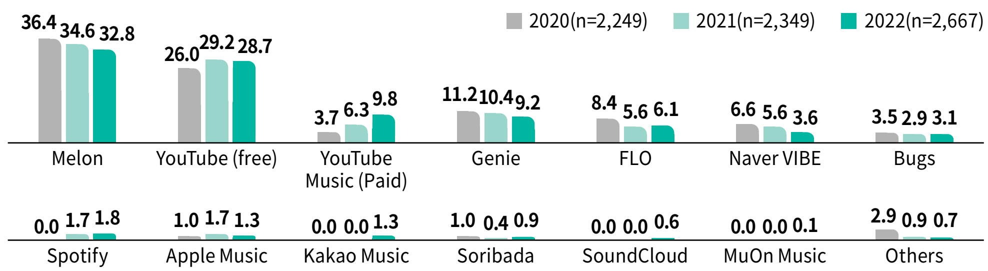


(2) Primarily used music streaming and downloading services

As a result of asking those who have used music streaming and downloading services (n=2,667) about the service they use the most, "Melon" was the highest at 32.8%, followed by "YouTube (free) (28.7%)" and "YouTube Music (paid) (9.8%)."

Figure Primarily Used Music Streaming and Downloading Services

(Base: Music streaming and downloading service users, Unit: %)

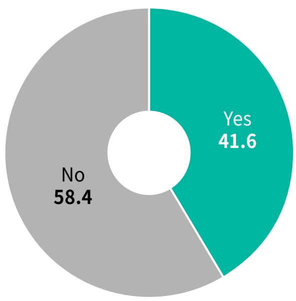


(3) Experience in changing music streaming and downloading services

The ratio of respondents who answered they had an experience of changing music streaming and downloading services was 41.6%, and it was relatively higher in women than men and in their 30s by age.

Figure Experience in Changing Music Streaming and Downloading Services

(Base: Music streaming and downloading service users (n=2,677), Unit: %)

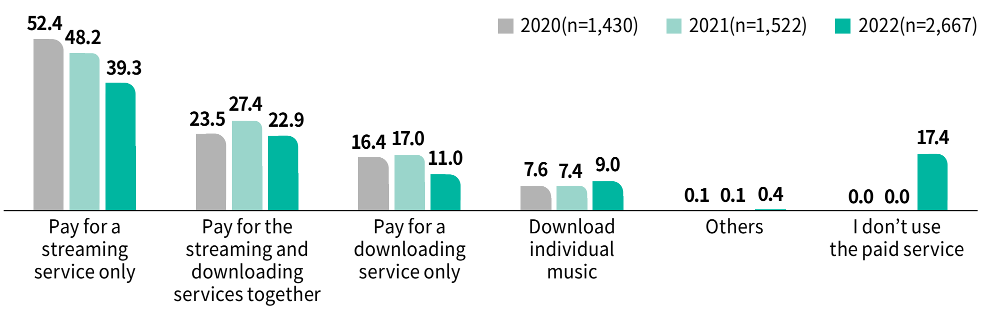


(4) Use method of paid music streaming and downloading services

As for the use method of paid music streaming and downloading services users (n=2,667), “pay for a streaming service only” was the highest at 39.3%, followed by “pay for the streaming and downloading services together (22.9%),” “pay for a downloading service only (11.0%),” “download individual music (22.9%),” etc.

Figure Use Method of Paid Music Streaming and Downloading Services

(Base: Music streaming and downloading servicer users, Unit: %)



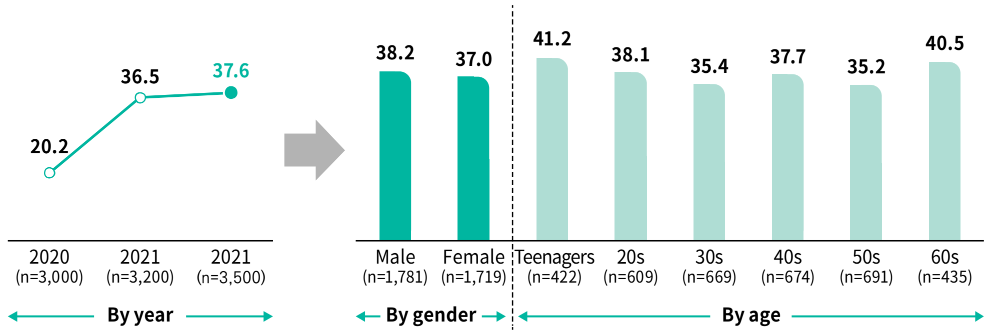
3.4 Experience of purchasing physical albums

(1) Experience of purchasing physical albums

The ratio of music users who purchased physical albums, such as CD, LP, DVD, Blu-ray, cassette tape, kino albums, and USB albums, was 37.6%.

Figure 10 Experience of Purchasing Physical Albums

(Base: All, Unit: % (Yes %))



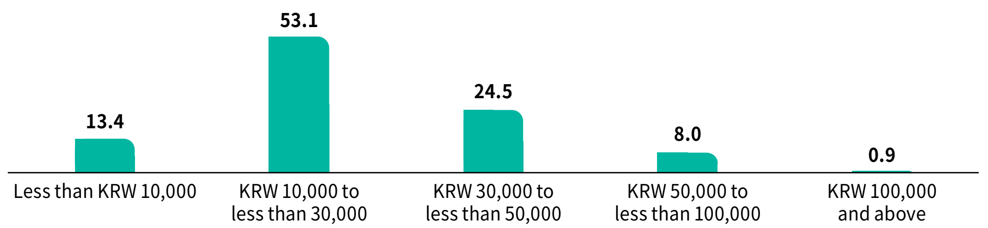
Note 1) In 2020, it asked whether or not there was a purchase experience, but in 2021, it was changed to a question asking for multiple responses on purchase experiences by physical album type.
2) “Blu-ray” was changed to “Blu-ray/4k Blu-ray.”

(2) Amount for purchasing music

The payment amount per album of those who have experience purchasing physical albums (n=1,316)was “KRW 10,000 to less than 30,000” at the highest of 53.1%.

Figure 11 Payment Amount for Purchasing One Physical Album

(Base: Physical album purchasers (n=1,316), Unit: %)

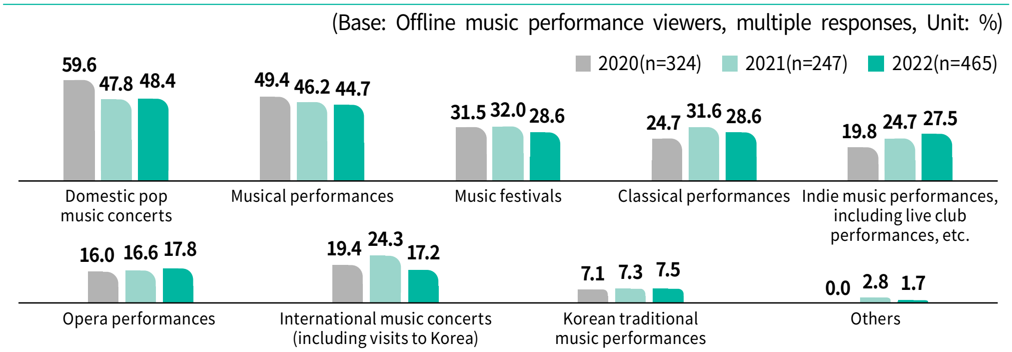


3.5 Overall status of viewing music performance

(1) Offline music performance genre for viewing

As for the viewing genre of offline music performance viewers (n=465), "domestic pop music concert" was the highest at 48.4%, followed by "musical performance (44.7%)," "music festival (28.6%)," "classical performance (28.6%)," etc.

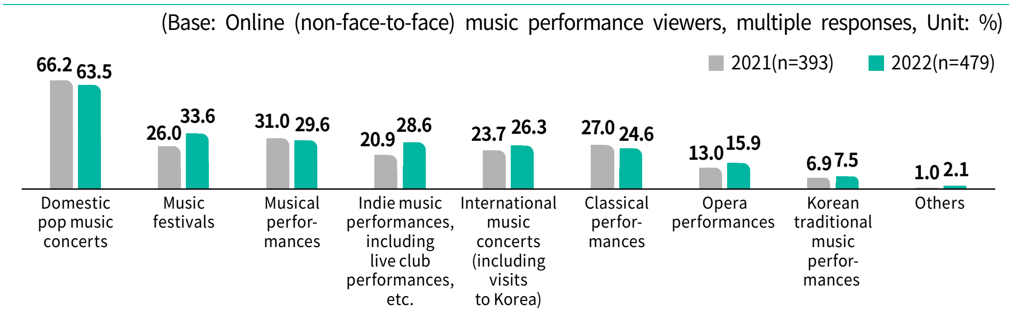
Figure 12 Offline Music Performance Genre for Viewing



(2) Online (non-face-to-face) music performance genre for viewing

The viewing genre of those who have experienced online (non-face-to-face) music performances (n=479) regardless of whether paid or free, "domestic pop music concert" was the highest at 63.5%, followed by "music festival (33.6%)," "musical performance(29.6%)," etc.

Figure 13 Online (Non-Face-to-Face) Music Performance Genre for Viewing



Note) Newly added in 2021.

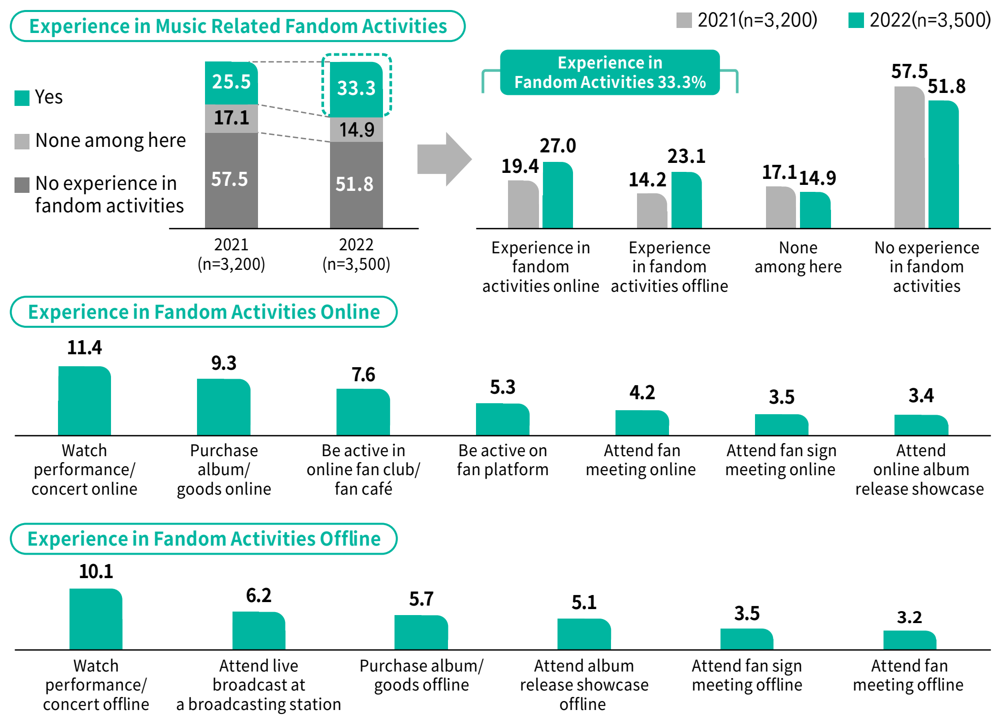
3.6 Overall status of fandom activities and music goods purchase

(1) Fandom activity status

Among the respondents, 33.3% of respondents had music-related fandom activities. Among them, 27.0% experienced fandom activities online, and 23.1% experienced fandom activities offline.

Figure 14 Experience in Music-related Fandom Activities

(Base: All, multiple responses, Unit: %)



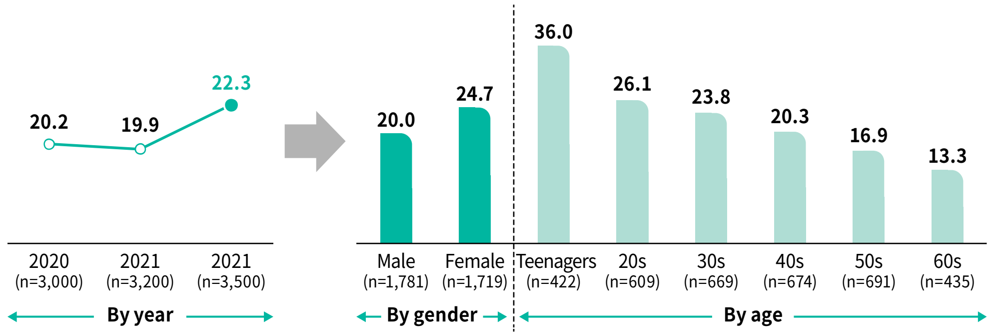
Note) Newly added in 2021.

(2) Experience in purchasing music goods/MD

The ratio of respondents with experience purchasing music goods/MD was 22.3%, which was an increase from the previous year.

Figure 15 Experience in Purchasing Music Goods/MD

(Base: All, Unit: % (Yes %))



Part 2 Music Support Business Trends

1. Enhancement of Production Capabilities

(1) Muse On

"MUSE ON," a project that was launched in 2019 to discover promising musicians, was improved and promoted in 2021. In 2020, the project supported new and established musicians, but in 2021, it discovered and fostered new musicians with musicality and potential.

(2) Support for spacing-planning performances

The "Space Planning Performance Support" project, which has been in progress since 2020, is a project that promotes the development of the popular music performance industry through creative performance planning support. In 2021, to revitalize the popular music performance industry, the scope of support was expanded to new themed performances using existing performance halls, limiting the venue to new spaces, such as complex cultural space, regenerated space, etc. Moreover, following the emergence of corporate social responsibility, the ESG-type performance field was newly established.

(3) Support for hosting popular music performances online

In 2021, Korea Creative Content Agency newly established a support project for hosting popular music performance online to create a new revenue model by inducing the creation of an online performance market and to support the development of next-generation performance contents. A minimum of KRW 50 million to a maximum of KRW 500 million was invested per task to support holding a total of 45 online performances, including ▲realistic technology-combined online performances, ▲series-type online performances, and ▲short-term online performances.

(4) Production of online video contents

In 2021, the Korea Creative Content Agency launched an online video content production project, as online video contents emerged regardless of the genre, and the strengthening of online platforms became prominent. The project was established to support the domestic and international promotion of popular music musicians through music video content production and distribution support, supporting the production of ▲live clips, ▲promotional videos, ▲music videos, etc. Through this project, a total of 20 tasks were selected, and a maximum of KRW 20 million was funded. Among the supported musicians, the tasks that achieved 1.4 million views on YouTube and USD 11,000 in sales linked to support projects were selected for calculation.

(5) ICT-music (Music Tech) production support

The ICT-Music (Music Tech) production support is a support project newly launched in 2020 to support and cultivate these attempts actively. This project is aimed at domestic music startups and related companies that want to produce and service a convergence project combining music and new ICT technologies. The funding was provided to a total of 15 places with a maximum of KRW 270 million for the project's commercialization, PR, and marketing.

2) Domestic and overseas distribution support

(1) Seoul International Music Fair (MU:CON 2021)

Due to COVID-19 which lasted since 2020, it was held as an exclusively online event in 2021. "MU:CON Online 2021," which was held for 3 days from September 30 to October 2, consisted of an opening performance, online showcase, conference, matchmaking and pitching, and music tech. The showcase and conference including the opening performance were broadcast live through the YouTube KOCCA MUSIC channel, and the matchmaking was conducted through the MU:CON website.

The opening performance, held to commemorate the 10th anniversary of MUCON, featured musicians loved worldwide, including those who participated in past MUCON showcases such as NCT Dream, Jambinai, Younha, Pentacon, Heize, and Zion.T. It was held as a festival that domestic and foreign K-Pop fans could enjoy together, recording about 1.6 million online real-time viewers.

(2) Korea Spotlight

“Korea Spotlight,” a Korean pop music showcase held at major overseas music markets and festivals, is a project that has been promoted for strategic overseas expansion of many domestic popular music artists who showcase the music of various genres. Before the COVID-19 pandemic, Korean popular music musicians were introduced to music officials around the world at various music markets, including SXSW (USA), TGE (UK), Reeperbahn Festival (Germany), MIDEM (France), CMW (Canada), Music Matters (Singapore), etc.

In 2021, Korea Spotlight, an overseas K-Pop showcase program hosted by the Korea Creative Content Agency, was invited as the guest of honor to “Reeperbahn Festival,” Europe's largest music market held in Hamburg, Germany. A total of nine musicians participated, and “Bryn” and “Drippin” appeared in the opening showcase as part of the benefits of being the guest of honor. It was held as an online showcase, but the performance video was transmitted in real-time through the local showcase venue and the official Reeperbahn Festival website.

As of December, 2021, this showcase recorded 156,530 views, confirming European music officials’ interest in Korean musicians.

(3) Online marketing support project for overseas expansion

As online platforms such as YouTube and TikTok have become important media for spreading popular music's global recognition, and the importance of online promotion and marketing has emerged, the Korea Creative Content Agency launched an online marketing support project for overseas expansion in 2021. This project provides support for marketing costs and pre- and post-consulting for musicians planning to enter overseas markets, such as album releases, online and offline performances, video releases, and MD sales. A total of 50,557,158 views were achieved as a result of a marketing campaign of 76 contents for a total of 16 teams of musicians.

3) Future Prospects of the Music Market

According to the International Federation of the Phonographic Industry (IFPI), despite the downturn in the popular music performance market at home and abroad due to COVID-19, the global music market grew by 18.5% compared to 2020, recording USD 25.9 billion in sales. Paid music streaming services led the growth, and in 2021, global streaming services accounted for 65% of total music sales. In the "2021 Music User Survey" published by the Korea Creative Content Agency, the growth of streaming services is expected to continue, with the use of paid streaming services ranked first in the use method of online music services. As the spread of COVID-19 has stabilized globally, it is expected that the industry will be able to recover to pre-pandemic scale in 2022.

In regions such as the US and Europe, face-to-face performances, music festivals, and markets began to be held in the second half of 2021, and as a result, overseas tours of domestic musicians such as BTS, Monsta X, ADOY, and SE SO NEON resumed. However, despite the active venues of face-to-face performances, online performances, which have become a new genre rather than an alternative, are expected to be held continuously.

Moreover, various future technologies such as AI, blockchain, NFT, and metaverse are converging with the music industry to generate new music content and services. Major domestic entertainment companies are creating new revenue models by utilizing future technologies, such as NFTs and metaverses. They also promote various IP products and businesses by combining artist-based IP with future technology. The application of these new technologies is expected to influence the direction of future music industry business development.

The digital transformation phase and, the global pandemic of COVID-19 has generated many changes in the music industry at home and abroad. Yet, we will promote active policy support so that Korean popular music can grow further amidst these changes.

2022
音乐
产业白皮书

摘　要

第一节 音乐用户趋势

1）调查目的和概要

本次调查的目的是通过用户统计数据向音乐内容用户和制作人提供必要的信息，并将其用作树立行业振兴政策的基础资料。

为此，以10周岁~69周岁的全体国民为对象，对整体音乐的使用情况进行了问卷调查。调查以2021～2022年为对象，对国内音乐用户使用形态的整体进行了测量。详细的调查内容包括：音乐使用服务、实体专辑购买情况、音乐公演观看情况、音乐使用方式和手段、粉丝活动情况等。

2）调查设计

本调查的对象是居住在全国范围内的10周岁到69周岁以下国民中最近1年内“2~3个月1次以上”使用过音乐内容的用户。调查周期为一年一次，除非另有说明，内容使用调查的回答标准为2021年7月至2022年7月(最近一年)，资料通过在线调查收集。采集的资料按照专业的验证流程进行编辑(Editing)和清洗(Cleaning)，增加了资料的可信度。

表 1 音乐用户实情调查设计

项目	内容
目标总体	• 10周岁~69周岁的全体国民
调查总体	• 在10周岁~69周岁的全体国民中最近一年“2~3个月一次以上”使用过音乐内容的用户
调查地区	• 全国
资料收集方法	• 通过结构化的问卷在网上进行调查
抽样框	• 截至2022年6月，行政自治部提供的居民登记人口统计现状 • 将调查执行机构持有的全国固定样本组117万名作为抽样框
抽样方法	• 按各地区/性别/年龄比例分配
抽样误差	• 95%置信水平 ±1.66%p
有效样本	• 3,500名
资料收集时间	• 2022年7~8月(7.22.~8.26.)

3）主要调查结果

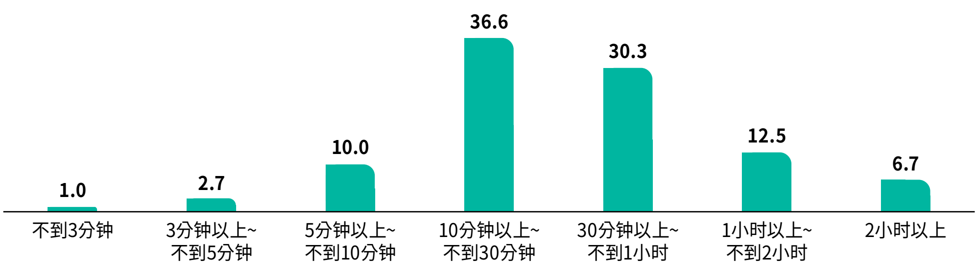
3.1. 与听音乐相关的生活方式

(1) 听音乐的时间

用户听一次音乐的时间为“10分钟以上~30分钟以下”的回答最多，占36.6%。其次是听一次音乐为“30分钟以上~1小时以下”的回答，占30.3%。

图 1 听音乐的时间(听一次时)

(Base：全体(n=3,500)，单位：%)

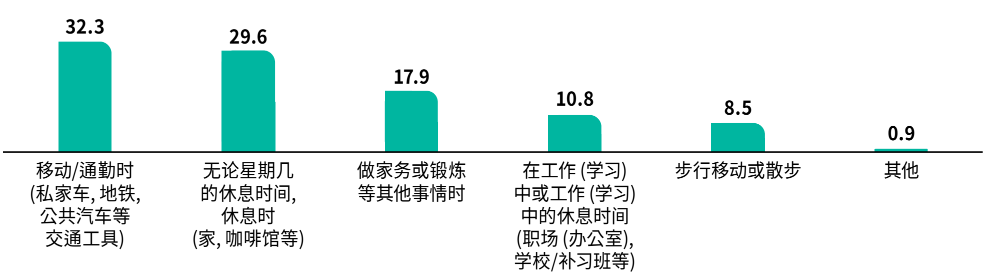


(2) 听音乐的场景或场所

在听音乐的主要场景或场所中，“移动/通勤时(在私家车、地铁、公共汽车等交通工具中)”占比最高，为32.3%。其次是“无论星期几的休息时间，休息时(在家、咖啡馆等)” (29.6%)，以及“做家务或锻炼等其他事情时(17.9%)”。

图 2 听音乐的场景

(Base：全体(n=3,500)，单位：%)



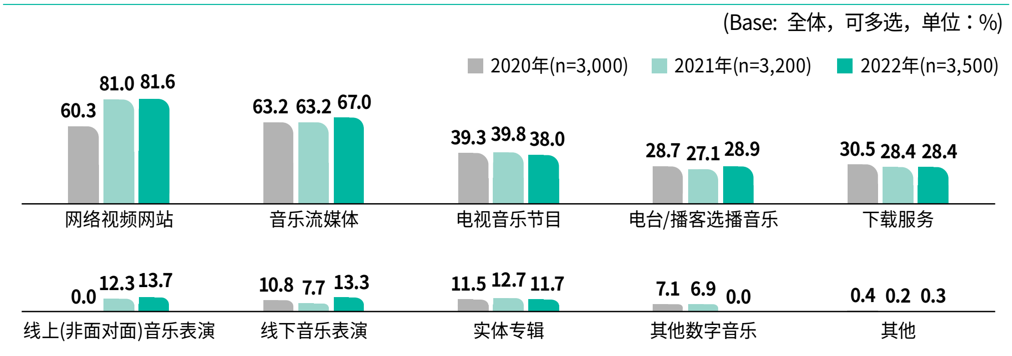
注) 2022年新问题项。

3.2. 音乐使用方法

(1) 听音乐时使用的方式或服务

在听音乐时使用的方式或服务中，“网络视频网站”以81.6%占据首位。其次是“音乐流媒体（67.0%）”和“电视音乐节目（38.0%）”。

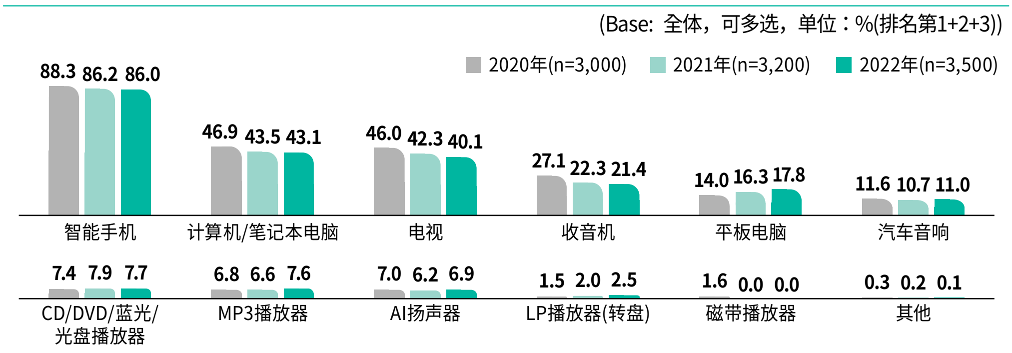
图 3 听音乐时使用的方式或服务



(2) 听音乐时使用的设备

在听音乐时使用的设备中(以第1+2+3位为准)，“智能手机” 以86.0%占据首位。其次是“计算机/笔记本电脑(43.1%)”，“电视(40.1%)”。

图 4 听音乐时使用的设备

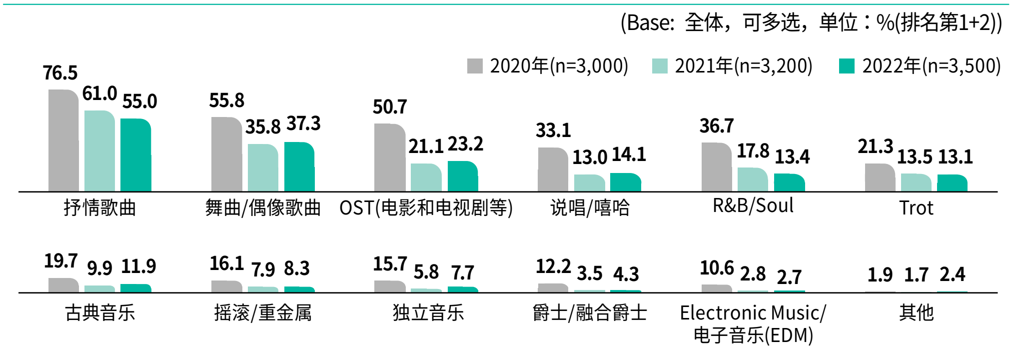


注）删除了2021年“磁带播放器”选项。

(3) 爱听的音乐类型

在爱听的音乐类型中(以第1+2位为准)，“抒情歌曲” 以55.0%占据首位，但在2020年之后呈现下降趋势。位于 “抒情歌曲” 之后的是 “舞曲/偶像歌曲”(37.3%)，“OST(电影、电视剧等)” (23.2%)。

图 5 爱听的音乐类型



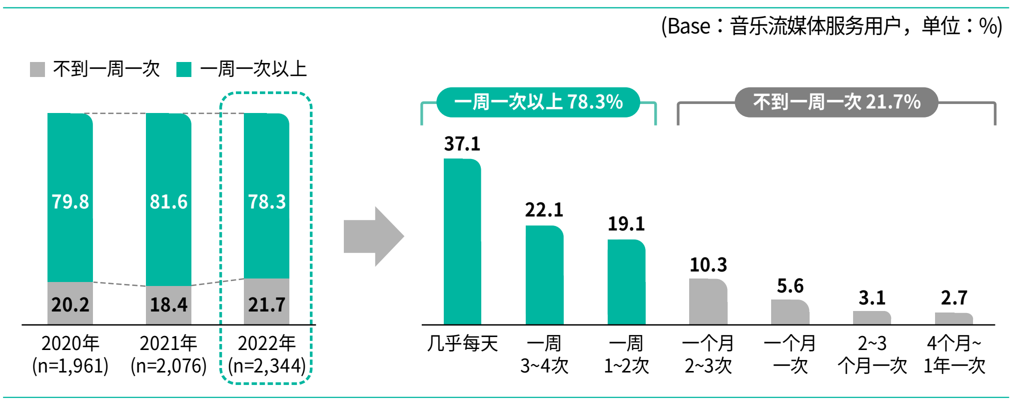
注) 从2020年的多选型(全部选择)变更为2021年的排序型，因此在直接比较时需注意。

3.3. 音乐流媒体和下载服务使用情况

(1) 音乐流媒体和下载服务使用频率

“一周1次以上”使用音乐流媒体的比例为78.3%，比上一年下降了3.3%p。从受访者的特性来看，女性使用频率相对高于男性，20~29岁和30~39岁年龄层使用频率相对较高。

图 6 音乐流媒体服务使用频率

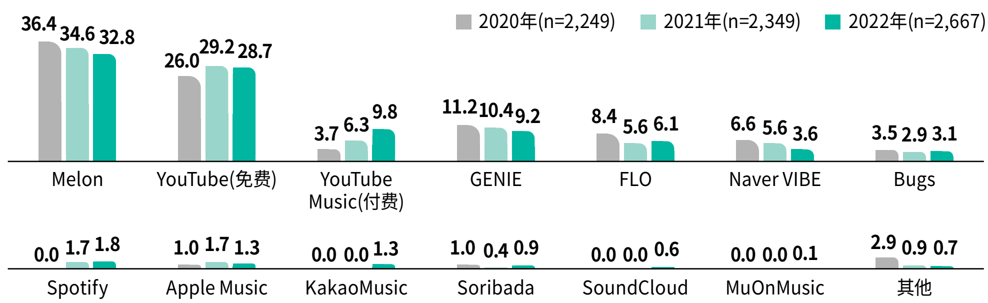


(2) 音乐流媒体和下载主要使用服务

在询问使用过音乐流媒体和下载服务的受访者(n=2,667)主要使用的音乐流媒体和下载服务时，“Melon”占比最高，为32.8%。其次是“YouTube(免费)” (28.7%)和 “YouTube Music(付费)” (9.8%)。

图 7 音乐流媒体和下载主要使用服务

(Base：音乐流媒体和下载服务用户，单位：%)

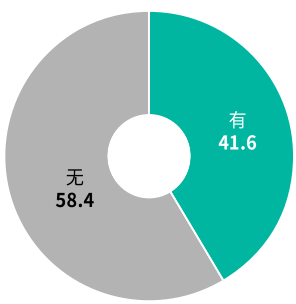


(3) 更换音乐流媒体和下载服务的经历

41.6%的受访者回答有过更换音乐流媒体和下载服务的经历，其中女性更换音乐流媒体和下载服务的经历相对高于男性，从年龄层来看，30~39岁的比例相对较高。

图 8 更换音乐流媒体和下载服务的经历

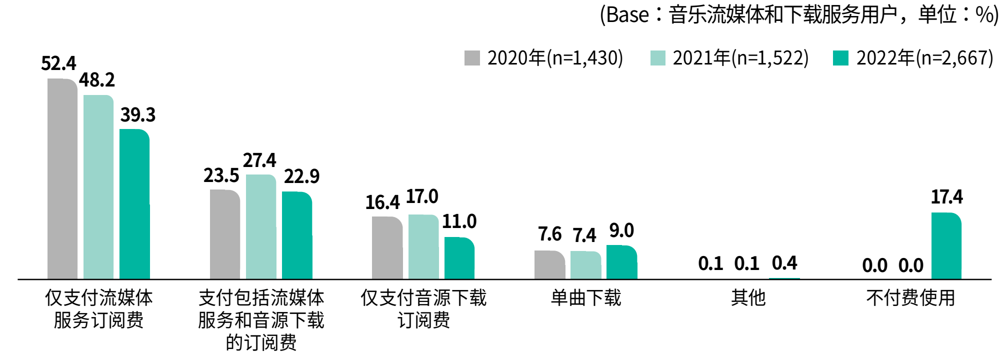
(Base：音乐流媒体和下载服务用户(n=2,667)，单位：%)



(4) 音乐流媒体和下载服务的付费使用方法

在音乐流媒体和下载服务用户(n=2,667)的付费使用方法中，“仅支付流媒体服务订阅费”占比最高，为39.3%。其次是“支付包括流媒体服务和音源下载的订阅费”(22.9%)，“仅支付音源下载订阅费” (11.0%)以及“单曲下载”(9.0%)。

图 9 音乐流媒体和下载服务的付费使用方法

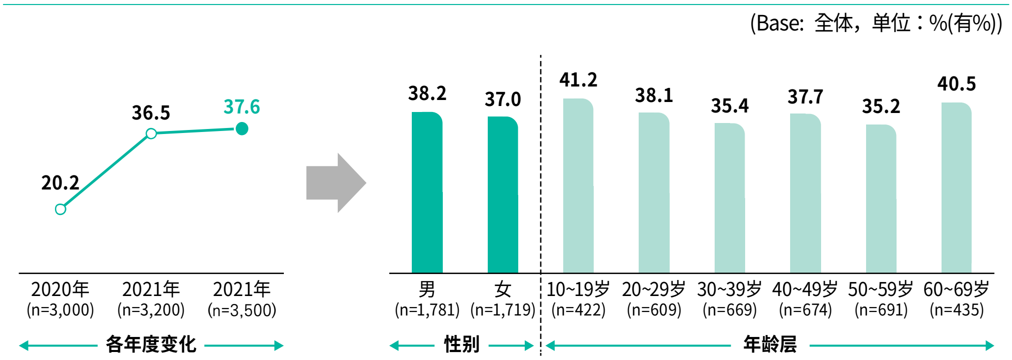


3.4. 实体专辑购买情况

(1) 实体专辑购买经历

CD、LP、DVD、蓝光/4K蓝光、盒式磁带、Kihno专辑、USB专辑等实体专辑购买体验率为37.6%。

图 10 实体专辑购买经历

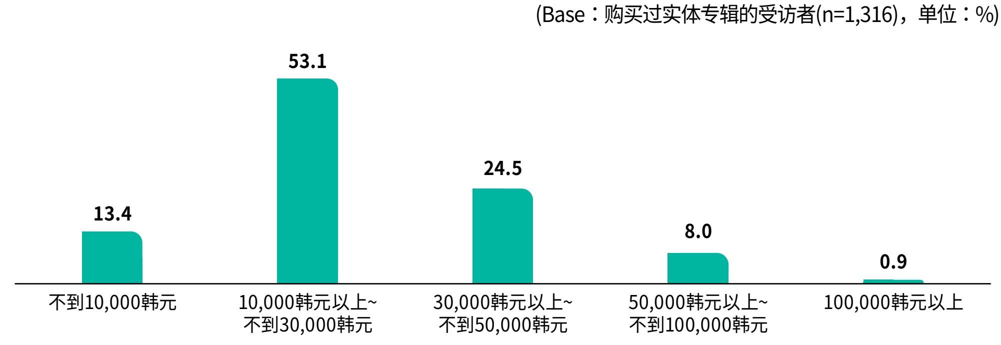


注 1) 2020年的问题为是否有购买经历，从2021年开始改为对各类型实体专辑购买经历的多选回答。
2) “蓝光”选项更改为“蓝光/4k蓝光”。

(2) 实体专辑支付金额

在购买过实体专辑的受访者的(n=1,316)每张专辑支付金额中，“10,000韩元以上～不到30,000韩元”占比最高，为53.1%。

图 11 每张实体专辑支付金额

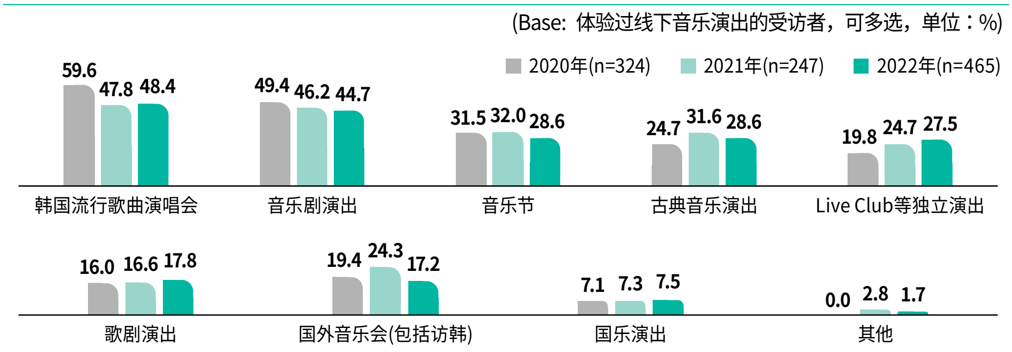


3.5. 音乐演出观看情况

(1) 线下音乐演出观看类型

在体验过线下音乐演出的受访者的(n=465)观看类型中，“韩国流行歌曲演唱会”占比最高，为48.4%。其次是“音乐剧演出”（44.7%）、“音乐节”（28.6%）”和“古典音乐演出（28.6%）”。

图 12 线下音乐演出观看类型

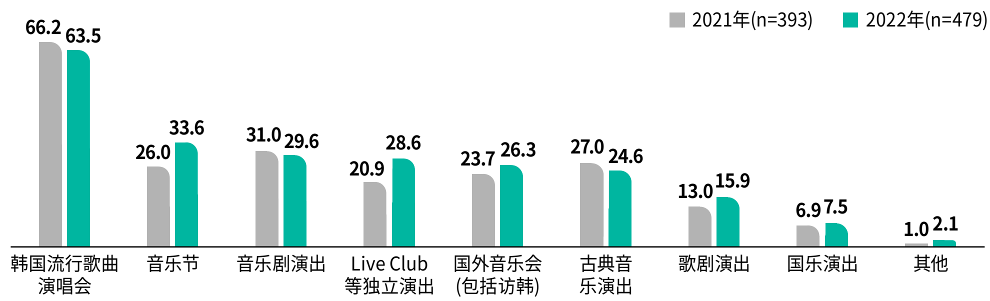


(2) 在线（非面对面）音乐演出观看类型

无论付费还是免费，在体验过在线（非面对面）音乐演出的受访者的（n=479）演出观看类型中，“韩国流行歌曲演唱会”占比最高，为63.5%。其次是“音乐节”(33.6%)，“音乐剧演出”(29.6%)。

图 13 在线（非面对面）音乐演出观看类型

(Base: 体验过在线(非面对面)音乐演出的受访者，可多选，单位：%)



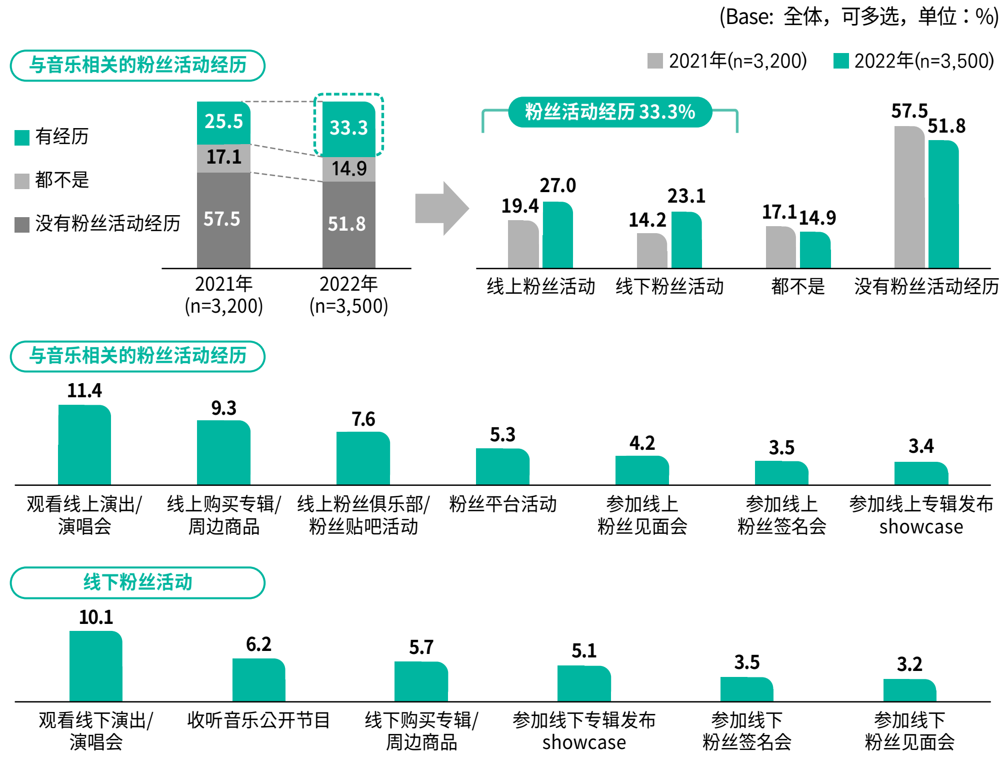
注) 2021年新问题项。

3.6. 粉丝活动及音乐周边商品(goods) 购买情况

(1) 粉丝活动情况

在受访者中，有过与音乐相关的粉丝活动经历的比率为33.3%。其中，在线上体验过粉丝活动的为27.0%，在线下体验过粉丝活动的为23.1% 。

图 14 与音乐相关的粉丝活动经历

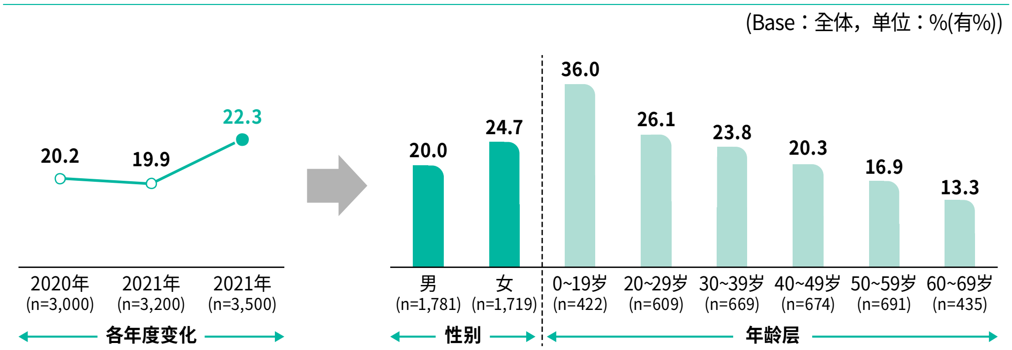


注）2021年新问题项。

(2) 音乐周边商品/MD购买经历

受访者购买过音乐周边商品/MD的比率为22.3%，较上年有所增加。

图 15 音乐周边商品/MD购买经历



第二节 音乐扶持项目趋势

1. 加强制作能力

(1) MuseOn

是一个发掘有潜力的音乐家的项目，于2019年首次推出，2021年改进了其实施方法。2020年新音乐家和老音乐家得到了扶持，但从2021起，该项目以发现和培养具有音乐天赋和潜力的新音乐家的形式进行。

(2) 空间规划型演出举办扶持

自2020年以来一直在推进的"空间规划演出举办扶持"项目是一个通过扶持创意演出规划来促进流行音乐演出行业发展的项目。此前的扶持范围将演出场地限定为综合文化空间、再生空间等新空间，2021年为振兴流行音乐演出产业，将扶持范围扩大到利用现有的演出场地重新打造的主题型演出。此外，随着企业社会责任的兴起，新设了ESG型演出领域。

(3) 流行音乐线上演出举办扶持

为了通过引导线上演出市场的形成来创造新的收入模式并支持新一代演出内容的开发，韩国文化产业振兴院于2021年新设了流行音乐线上演出举办扶持项目。每个课题最少补贴5千万韩元，最多补贴5亿韩元，共扶持举办45场线上演出，包括扩展现实技术结合型线上演出、系列型线上演出和短期型线上演出。

(4) 网络视频内容制作

随着网络视频内容的兴起以及网络平台优势凸显，韩国文化产业振兴院在2021年新设了网络视频内容制作扶持项目。该项目旨在通过音乐视频内容制作和分发扶持来支持韩国流行音乐人的国内外宣传，对现场剪辑、宣传视频、MV等进行了制作扶持。通过该项目共选定了20个课题，最高补贴2千万韩元，在扶持的音乐人中，实现了YouTube观看次数140万和与扶持项目相关的销售额11,000美元等成果。

(5) ICT-音乐(Music Tech)制作扶持

ICT-音乐（Music Tech）制作扶持项目2020年启动的一个新的扶持项目，该项目积极反映了基于技术的不断变化的音乐市场。针对推进将基于音乐和ICT新技术相结合的融复合项目的音乐产业初创企业和相关公司，共有15家获得了高达2.7亿韩元的项目制作所需的各项费用及推广和营销费用扶持。

2）国内外分发扶持

(1) 举办首尔国际音乐博览会(MU:CON 2021)

由于自2020年以来一直持续的新冠疫情，活动在2021年也策划为全面线上举行。“MUCON Online 2021”于9月30日至10月2日举行，为期3天，包括开幕表演、线上展示、线上会议、推介和商业配对以及音乐科技。包括开幕表演在内的展示和会议在KOCCA MUSIC YouTube频道上进行了直播，商业配对则通过MUCON网站进行。

为纪念MUCON10周年而举办的开幕演出，有包括NCT Dream、Jambinai、Younha、Pentagon、Heize和Zion.T等过去参加过MUCON展示的音乐人以及受到全世界喜爱的音乐人演出，创下在线实时观看人数约160万次，成为了让全球K-Pop粉丝共同欢愉的庆典。

(2) 举办Korea Spotlight

在主要海外音乐市场及庆典上举办的韩国流行音乐展示“Korea Spotlight”，是扶持各种流派音乐的音乐人战略性走向海外而一直推进的项目。在新冠疫情爆发以前，参加过SXSW（美国）、TGE（英国）、Reeperbahn Festival（德国）、MIDEM（法国）、CMW（加拿大）、Music Matters（新加坡）等多种音乐市场，向全世界音乐相关人士介绍了韩国流行音乐音乐人。

2021 年，韩国文化产业振兴院主办的海外K-Pop展示项目Korea Spotlight受邀作为主宾国参加在德国汉堡举办的欧洲最大音乐节“Reeperbahn Festival(以下称绳索街音乐节)”。共有9位音乐人参加，作为主宾国的优待，“Bryn”和“Drippin”在开幕式展示上进行了表演。尽管表演是以在线展示的形式举行的，但表演视频通过当地展示场地和绳索街音乐节官方网站进行了实时播放。

截至2021年12月，该展示的浏览量达到156,530次，证实了欧洲地区音乐相关人士对韩

国音乐人的兴趣。

(3) 进军海外的网络营销扶持项目

随着YouTube和TikTok等在线平台成为传播流行音乐全球知名度的重要媒体，在线推广和营销的重要性凸显，韩国文化产业振兴院于2021年新设了进军海外的网络营销扶持项目。该项目为计划进入海外市场的音乐人补贴专辑发行、线上线下演出、视频公开、MD销售等平台营销费用和前期/后期咨询。通过为总共16组音乐人开展76项内容的营销活动，共获得50,557,158次浏览量。

3）音乐市场未来前景

国际音乐产业协会（IFPI）表示，尽管新冠疫情导致国内外流行音乐演出市场停滞，但全球音源市场与2020年相比增长了18.5%，销售额达到259亿美元。音乐流媒体付费服务引领增长，2021年全球流媒体服务占整体音源销售额的65%。在韩国文化产业振兴院发布的《2021音乐用户实态调查》中，付费流媒体服务使用在网络音源服务使用方法中排名第一，流媒体服务增长势头预计将在未来持续。随着新冠疫情的传播在全球范围内趋于稳定，预计在2022年能够恢复到疫情前的产业规模。

美国和欧洲等地区从2021年下半年开始举办面对面演出、音乐节和市场，因此BTS、MONSTA　X、ADOY、新少年等韩国音乐人的海外巡演重新开始。即使重新积极举办面对面的演出，已经成为一种新类型而非替代品的在线演出将有望继续举行。

此外，人工智能、区块链、NFT和、元宇宙等各种未来技术正在与音乐产业融合，带来新的音乐内容和服务。韩国主要娱乐公司正在利用NFT和元宇宙等未来技术创造新的盈利模式。它还通过将未来技术融入基于艺术家的IP来推广各种IP产品和业务。这些新技术的应用将决定今后音乐产业未来业务发展的方向。

随着新冠疫情的全球流行，数字化转型局面给国内外音乐产业带来了很多变化。但在这种变化中,为了帮助韩国流行音乐取得进一步发展，韩国内容产业振兴院将积极推进政策扶持。